

## (Formerly TIPWeb-IT)

Release Notes – Version 13.1

Frontline Education is happy to announce the release of Asset Management v13.1 which includes the following enhancements:

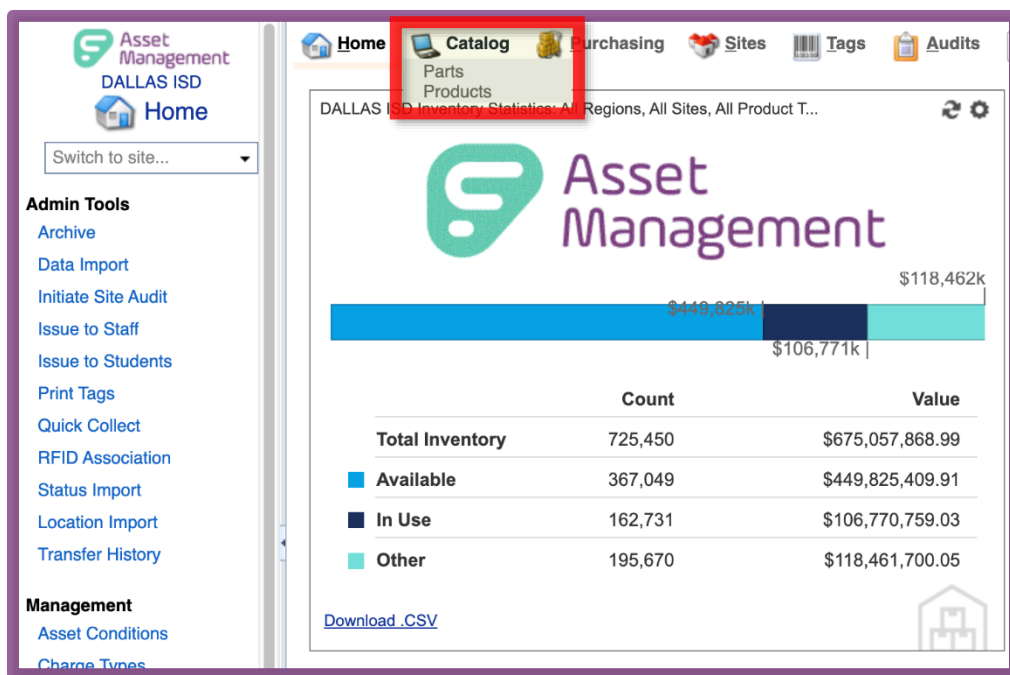
- 1) **Parts Management: Parts Catalog, Site Inventory, Product Assignment, Inventory History, Minimum Stock**
- 2) **District Settings: Access API and SSO documentation**
- 3) **Reconcile Tags on Transfers: Notes & Print Transfer Ticket**

### 1.TIH-833: Parts Management: Parts Catalog, Site Inventory, Product Assignment, Inventory History, Minimum Stock

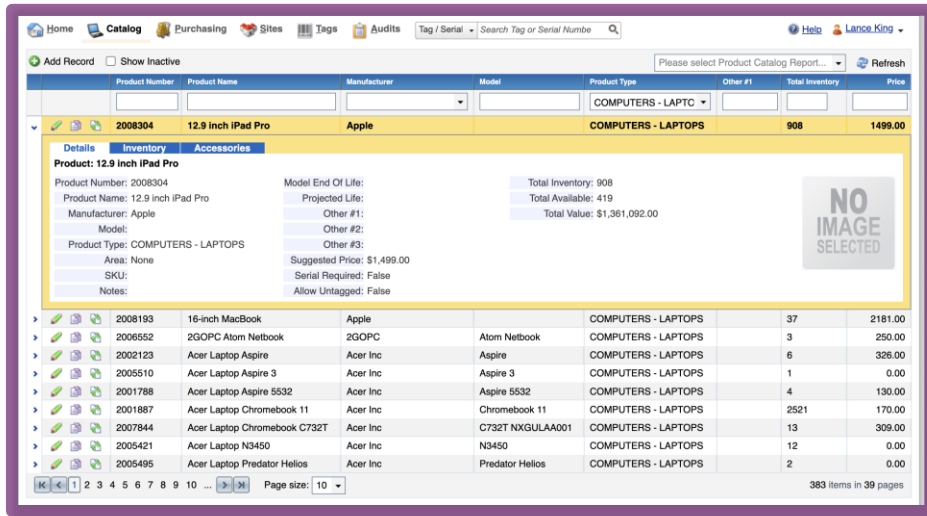
Asset Management Users can now add and track untagged consumable parts at each site. Parts Management will help to inventory the untagged parts needed for repairs across your district, whether that is for Technology, Maintenance, or Operations, your teams will have the perfect spot to track your consumables.

#### Catalog: Product Catalog Menu

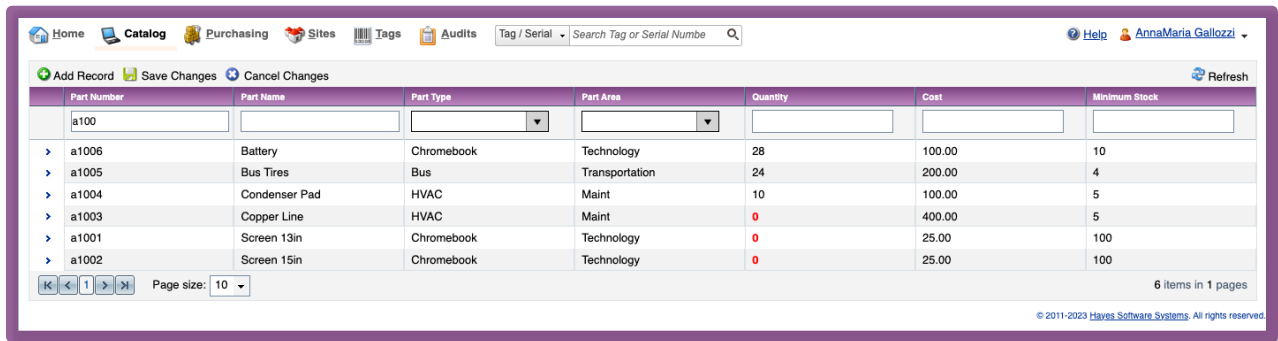
- Upon logging in, Admin and Site Users can now click “Catalog” from the top navigation and see a new drop-down menu displaying “Parts” and “Products.”
- All user types will view the Parts Catalog by default. Steps to modify permissions are described further in this document.



- Clicking “Products” from the Catalog menu will take you to the traditional Product Catalog.



- Clicking “Parts” from the Catalog menu will take you to the new Parts Catalog.



## User Permissions to Restrict Site View Users





















As an admin, there are permissions that can be turned on and off for non-admin users.

New options for permissions:


- **View Parts** - access and view the parts grid
  - If View Parts catalog is disabled, other capabilities for Parts will be disabled automatically.
- **Add/Edit Parts Catalog Items** – add new Parts catalog items/edit existing Parts catalog items
- **Remove/Add Parts Inventory (qty)** - update inventory quantity for parts at the site or district level
- **Associate Products** - associate a Product in the Product Catalog to a Part

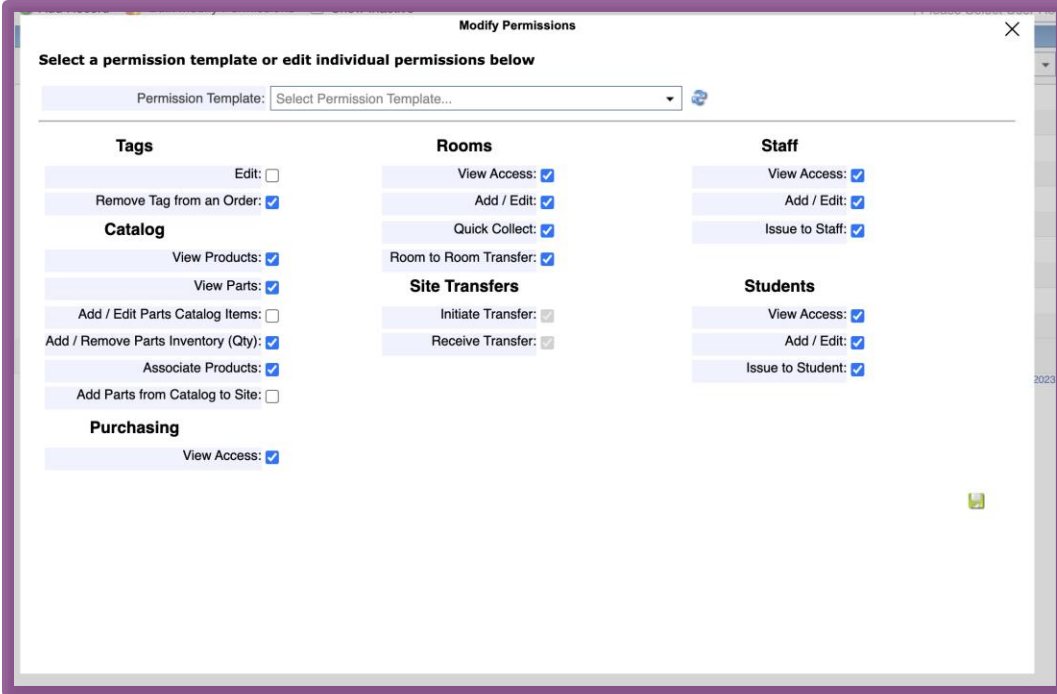
- If View Product catalog is disabled, associate products to parts is not possible
- **Add Part from Catalog to Site** - ability to see full catalog and add parts from full catalog to that site

The chart below shows the default permissions and which can be edited.

	View Parts	Add/Edit Parts Catalog Items	Remove/Add Parts Inventory (qty)	Associate Products	Add Parts from Catalog to Site
Admin Admin	 Default Active-Non Editable	 Default Active-Non Editable	 Default Active-Non Editable	 Default Active-Non Editable	 Default Active-Non Editable
Site Admin	 Default Active-Editable	 Default Active-Editable	 Default Active-Editable	 Default Active-Editable	 Default Active-Editable
Admin User	 Default Active-Editable	 Default Inactive-Editable	 Default Active-Editable	 Default Inactive-Editable	 Default Inactive-Editable
Site User	 Default Active-Editable	 Default Inactive-Editable	 Default Active-Editable	 Default Inactive-Editable	 Default Inactive-Editable

### Steps to Edit Permissions:

- Log in as an Admin to the Admin View.
- On the left navigation under Management, select “Users”.
- To change user permissions, you can click  for the user and the Modify Permissions window will appear.

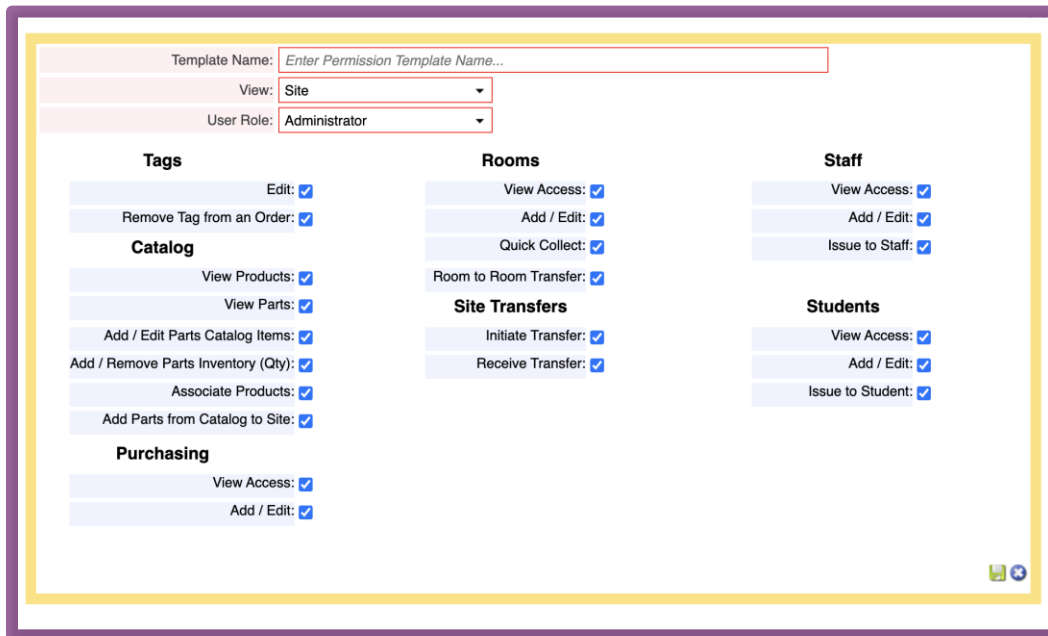
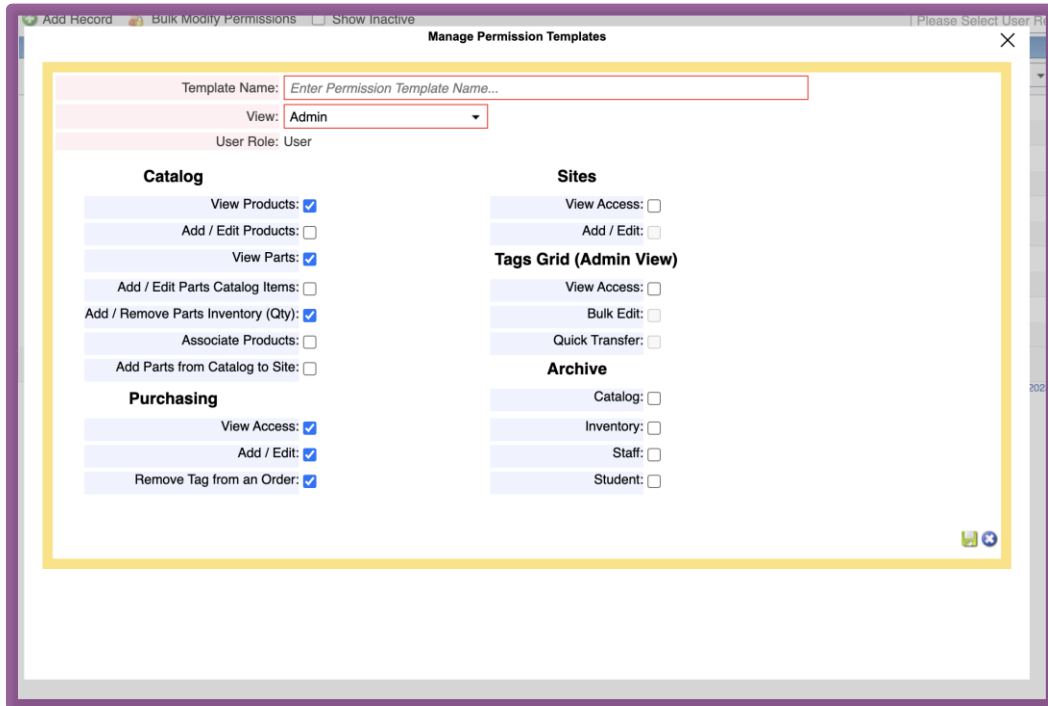


The screenshot shows a 'Modify Permissions' window with a title bar and a close button. Below the title bar, there is a section titled 'Select a permission template or edit individual permissions below' with a dropdown menu for 'Permission Template' set to 'Select Permission Template...'. The main content area is divided into several categories, each with a list of permissions and their status (checked or unchecked):

- Tags**
  - Edit:
  - Remove Tag from an Order:
- Catalog**
  - View Products:
  - View Parts:
  - Add / Edit Parts Catalog Items:
  - Add / Remove Parts Inventory (Qty):
  - Associate Products:
  - Add Parts from Catalog to Site:
- Purchasing**
  - View Access:
- Rooms**
  - View Access:
  - Add / Edit:
  - Quick Collect:
  - Room to Room Transfer:
- Site Transfers**
  - Initiate Transfer:
  - Receive Transfer:
- Staff**
  - View Access:
  - Add / Edit:
  - Issue to Staff:
- Students**
  - View Access:
  - Add / Edit:
  - Issue to Student:

Steps to Create/Edit Permission Templates:

- To edit Permission Templates to easily apply user permissions on a broader scale you can click Permission Templates under Management while on the User screen.
- Three different User Permission Template types are available: Admin User, Site Admin, and Site User.
- If creating a new template, after saving, navigate to your user and Modify Permissions choosing the Permission Temple from the dropdown option.



Template Name:

View:

User Role:

**Tags**

Edit:

Remove Tag from an Order:

**Catalog**

View Products:

View Parts:

Add / Edit Parts Catalog Items:

Add / Remove Parts Inventory (Qty):

Associate Products:

Add Parts from Catalog to Site:

**Purchasing**

View Access:

**Rooms**

View Access:

Add / Edit:

Quick Collect:

Room to Room Transfer:

**Site Transfers**

Initiate Transfer:

Receive Transfer:

**Staff**

View Access:

Add / Edit:

Issue to Staff:

**Students**

View Access:

Add / Edit:

Issue to Student:

## Parts Management Catalog

The Parts Catalog Grid includes in-line edit capabilities and functions differently from your Product Catalog Grid.

- To add a new record, click “Add Record” at the top of the Parts Catalog Grid and a new blank line will open up as the first row in the grid.
- You will be able to add new records without navigating away from the grid.
- Click “Save Changes” at the top of the Parts Catalog to add the new part to your catalog.
- Click “Cancel Changes” to close and discard any modifications to your catalog.

**Note:** any unsaved changes will be lost. If you navigate away from the grid, change a filter or hit refresh, adds or changes will be lost. Please save changes frequently and often.

You have unsaved changes. Any unsaved changes will be lost.

Part Number	Part Name	Part Type	Part Area	Quantity	Cost	Minimum Stock
<input type="text" value="a100"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
a1006	<input type="text" value="Required"/>	None	None		0	0
a1005	Bus Tires	Bus	Transportation		200	4
a1004	Condenser Pad	HVAC	Maint		100	5
a1003	Copper Line	HVAC	Maint	0	400.00	5
a1001	Screen 13in	Chromebook	Technology	0	25.00	100
a1002	Screen 15in	Chromebook	Technology	0	25.00	100

3 items in 1 pages

### Part Number:

- Part Number must be a unique identifier.
- Part Number can be a duplicate to Product Number as Parts are its own Catalog.
- Max character limit is 30 alphanumeric characters

### Part Name:

- Part Name must be a unique name.
- Part Name can be a duplicate to Product Name as Parts are its own Catalog
- Max characters limit of 30 alphanumeric characters

### Part Type and Part Area:

- Part Type and Part Area are drop downs menus created by users who have access to add and edit parts.
- To add a new Part Type or Part Area to the drop-down list, type you new entry and select the green plus sign.
- Part Type and Part Area fields are searchable and once the field is highlighted, click the name, or hit enter to save the selection.
- To navigate to the next field from the two drop down fields, you must click on the field - tabbing to move between drop down fields is not enabled.
- The character limit in these fields is 100 characters.

Part Number	Part Name	Part Type	Part Area	Quantity	Cost	Minimum Stock
a100						
a1006	Battery	Chromebook	None		0	0
a1005	Bus Tires	Chrom	Transportation	200	200	4
a1004	Condenser Pad	Chromebook	Maint	100	100	5
a1003	Copper Line		Maint	0	400.00	5
a1001	Screen 13in		Technology	0	25.00	100
a1002	Screen 15in		Technology	0	25.00	100

### Quantity

- The Quantity field in the grid is not editable from the Part Catalog grid.
- The Quantity field aggregates all site inventory for that part automatically. Steps to add inventory to sites are described further in this document.
- Field type is integer, and the character limit is 5,000,000.

**Note:** When the Quantity number appears in red, this is an indicator the Part quantity has fallen below the minimum stock required by the district.

Part Number	Part Name	Part Type	Part Area	Quantity	Cost	Minimum Stock
a100						
> a1006	Battery	Chromebook	Technology	28	100.00	10
> a1005	Bus Tires	Bus	Transportation	24	200.00	4
> a1004	Condenser Pad	HVAC	Maint	10	100.00	5
> a1003	Copper Line	HVAC	Maint	0	400.00	5
> a1001	Screen 13in	Chromebook	Technology	0	25.00	100
> a1002	Screen 15in	Chromebook	Technology	0	25.00	100

## Cost

- The cost field is not a required field
- Field type is decimal with no \$ present
- Field can accept up to \$100,000 in cost per item
- Cost field is per item, not an aggregate of all the parts in inventory

## Minimum Stock

- When the Quantity number appears in **red**, this is an indicator the Part quantity has fallen below the minimum stock required by the district.
- The field can accept up to 500,000 in minimum stock
- Field type is integer
- Field is not required

## Inventory Tab

- Click on the carrot ">" next to the Part.
- On the Inventory tab, you have the capability to add or remove inventory quantity to sites through in-line editing.



The screenshot displays a software interface for managing inventory. The main window shows a table with columns: Part Number, Part Name, Part Type, Part Area, Quantity, Cost, and Minimum Stock. A modal window titled "Add Inventory" is open, showing a table with columns: Location, Quantity, and Minimum Stock. The modal table lists six schools: High School, S Early College High School, S McAllen High School, S Memorial High School, S Rowe High School, and Sugu High school, each with a quantity of 5 and a minimum stock of 0. The modal also has "Add Inventory", "Save Changes", and "Cancel Changes" buttons, and a "Refresh" button. The main window also has "Add Record", "Save Changes", and "Cancel Changes" buttons, and a "Refresh" button.

## Add Inventory to Sites

- Click "Add Inventory" to view a list of sites to add parts inventory.
  - Once a site has been added to the inventory it is removed from the modal. If all sites are added to the modal pops up and says "No records to display"
- Make sure to check the box so the new site inventory quantity is added for the part.
  - If do not check your entry will not be saved, no error displays
- Tab or use your mouse to click into the next site quantity box.
- Click "Save" to associate the part to selected sites.
- Click the checkbox at the top left of the grid to select all sites in the system.
  - All sites including warehouse display

Part Name	Part Type	Part Area	Quantity
<b>Assign Sites</b>			
1 item(s) selected			Refresh
<input type="checkbox"/>	Site Name	Quantity	
	<input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/>	003 New Tech at B.F. Darrell	<input type="text" value="10"/>	
<input type="checkbox"/>	Bigtown High	0	
<input type="checkbox"/>	005 Molinas High	0	
<input type="checkbox"/>	T007 Jefferson High (Pre Tornado)	0	
<input type="checkbox"/>	008 Kimber High	0	
<input type="checkbox"/>	012 Pinkston High	0	
<input type="checkbox"/>	013 Roosevelt High	0	
<input type="checkbox"/>	014 Samuel High	0	
<input type="checkbox"/>	021 WT White High	0	
<input type="checkbox"/>	022 Woodrow Wilson High	0	
		Page size: 10	499 items in 50 pages

When performing a **Site Name search**, clicking the **select all check box** at the top-left of the modal will only select the sites returned in the search results, allowing you to add site inventory in bulk.

**Assign Sites** ✕

30 item(s) selected  Refresh

<input checked="" type="checkbox"/>	Site Name	Quantity
	<input type="text" value="high"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Bigtown High	10
<input checked="" type="checkbox"/>	005 Molinas High	5
<input checked="" type="checkbox"/>	T007 Jefferson High (Pre Tornado)	0
<input checked="" type="checkbox"/>	008 Kimber High	0
<input checked="" type="checkbox"/>	012 Pinkston High	0
<input checked="" type="checkbox"/>	013 Roosevelt High	0
<input checked="" type="checkbox"/>	014 Samuel High	0
<input checked="" type="checkbox"/>	021 WT White High	0
<input checked="" type="checkbox"/>	022 Woodrow Wilson High	0
<input checked="" type="checkbox"/>	023 Carter High	0

⏪ ⏩ 1 2 3 ⏪ ⏩
Page size: 10
30 items in 3 pages

As an admin in the admin view, can add sites without parts inventory quantity, allowing for site users to add their quantity later.

**Inventory** | **Products** | **Inventory History**

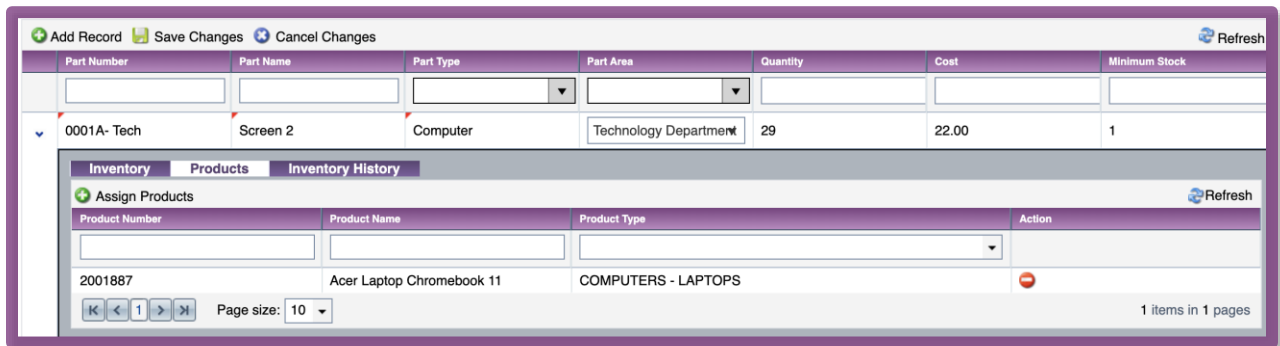
Add Inventory Save Changes Cancel Changes  Refresh

Location	Quantity	Minimum Stock
<input type="text"/>	<input type="text"/>	<input type="text"/>
#Pari01	11	33
000 General	3	0
005 Molinas High	5	0
006 Hillhurst High	0	0
007 Jefferson High	0	0
008 Kimber High	0	0
009 Lincoln High	0	0
012 Pinkston High	0	0
013 Roosevelt High	0	0
014 Samuel High	0	0

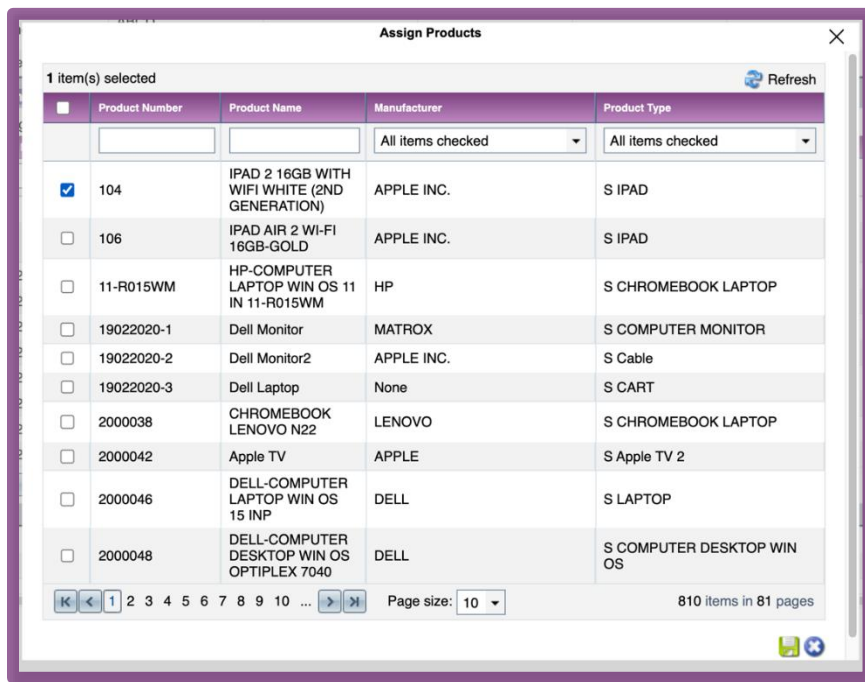
⏪ ⏩ 1 2 3 4 ⏪ ⏩
Page size: 10
32 items in 4 pages

**Products Tab**

As an admin, you can assign products to parts. This assignment will allow users to see which products use certain parts.

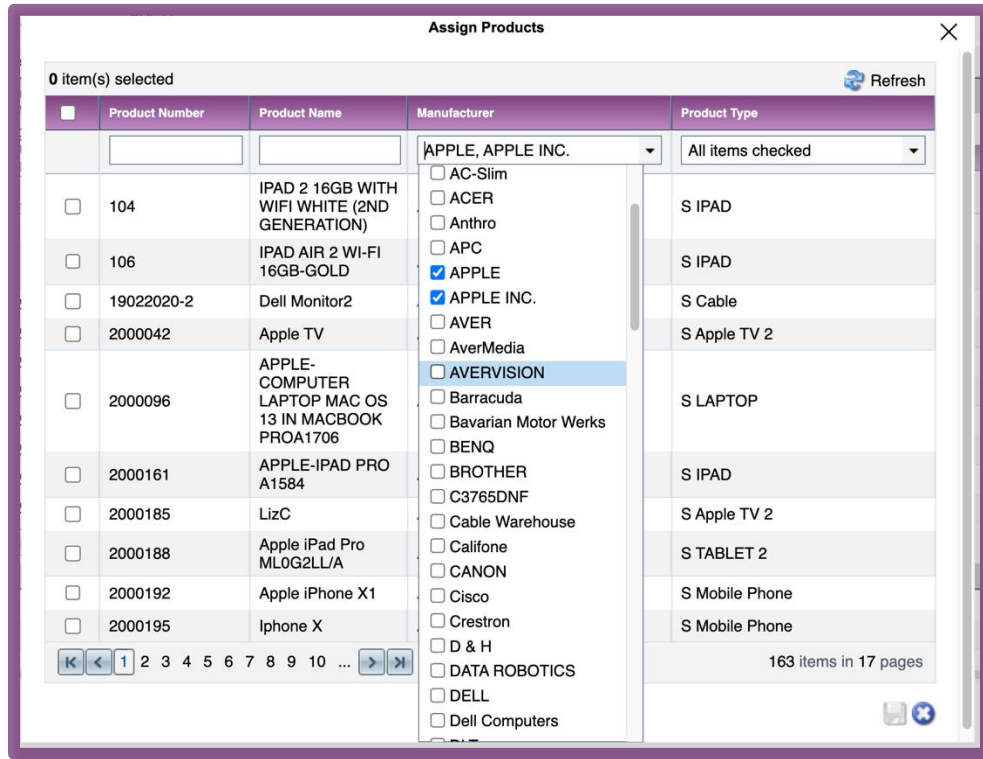


- By clicking “Assign Products”, a modal will open allowing you to search the whole product catalog.
- Search by product number, product name, manufacturer, and product type.



- To assign products to a part, check the boxes next to the product.

- Once a blue check is visible, you can click **Save** to keep your changes or **Cancel** to reject selections and close the modal.



When performing a search for product number, product name, manufacturer, or product type, clicking the **select all check box** at the top-left of the modal will only select the sites returned in the search results, allowing you to add site inventory in bulk.

## Inventory History Tab

- The **Inventory History Tab** shows all adjustments made to the Parts Inventory Quantity, who made the adjustments, when they were made, and quantity count changes. The Inventory History tab will track the Date, User (First and Last Name), Site Name, Quantity. Adjustment and Final Quantity of the Part.
- Negative adjustments are indicated in red and with a negative (-) sign.
- Positive adjustments are indicated in green.

Date	User	Site Name	Quantity Adjustment	Final Quantity
03/20/2023	AnnaMaria Gallozzi	High School	-2	3
03/20/2023	AnnaMaria Gallozzi	S McAllen High School	5	5
03/20/2023	AnnaMaria Gallozzi	S Memorial High School	5	5
03/20/2023	AnnaMaria Gallozzi	S Rowe High School	5	5
03/20/2023	AnnaMaria Gallozzi	S Early College High School	5	5
03/20/2023	AnnaMaria Gallozzi	High School	5	5
03/20/2023	AnnaMaria Gallozzi	Sugu High school	5	5

## Site View

- At the site level view, like the product catalog, site users will only be able to view parts allocated to their site by default but not what other sites have in inventory.
- The Catalog menu will now show two options, Parts and Products.
- The Product Catalog grid will function without new changes.
- The Parts Catalog grid will be viewable if user permissions permit.

**Note:** When the quantity numbers appear in red, it is an indicator that the quantity has fallen below the minimum stock required by the site.

The site minimum stock can be set at the district level or at the site level.

Part Number	Part Name	Part Type	Part Area	Quantity	Cost	Minimum Stock
a1006	Battery	Chromebook	Technology	5	100.00	0
a1005	Bus Tires	Bus	Transportation	4	200.00	0
a1004	Condenser Pad	HVAC	Maint	0	100.00	0
a1001	Screen 13in	Chromebook	Technology	5	25.00	10

- If the site user has access to add a new Part, “Add Record” will open the in-line edit function to allow the user to add Part Number, Part Name, Part Type, Part Area, Quantity, Cost and Minimum Stock for the site.
- Site created parts will roll up to the district parts catalog.
- An Admin Admin or District Admin, can make edits to the part created by a site at the district view.
- Click on the “Show Full Parts Catalog” button, if the part the site user is looking for does not have inventory or has not been associated to that site.

- The part quantities can be updated if the user has the permission to “Add Part from Catalog to site.” To add a part to your site, you can update the quantity and/or the minimum stock for that site.

Part Number	Part Name	Part Type	Part Area	Quantity	Cost	Minimum Stock
a100						
> a1006	Battery	Chromebook	Technology	5	100.00	0
> a1005	Bus Tires	Bus	Transportation	4	200.00	0
> a1004	Condenser Pad	HVAC	Maint	0	100.00	0
> a1003	Copper Line	HVAC	Maint	0	400.00	0
> a1001	Screen 13in	Chromebook	Technology	2	25.00	10
> a1002	Screen 15in	Chromebook	Technology	0	25.00	0

On the site level grid, when the carrot on the lefthand side is clicked and the row is expanded, only two tabs are shown, unlike the Admin View. The two tabs shown are “Products” to show product associations and “Inventory History” to show all inventory changes.

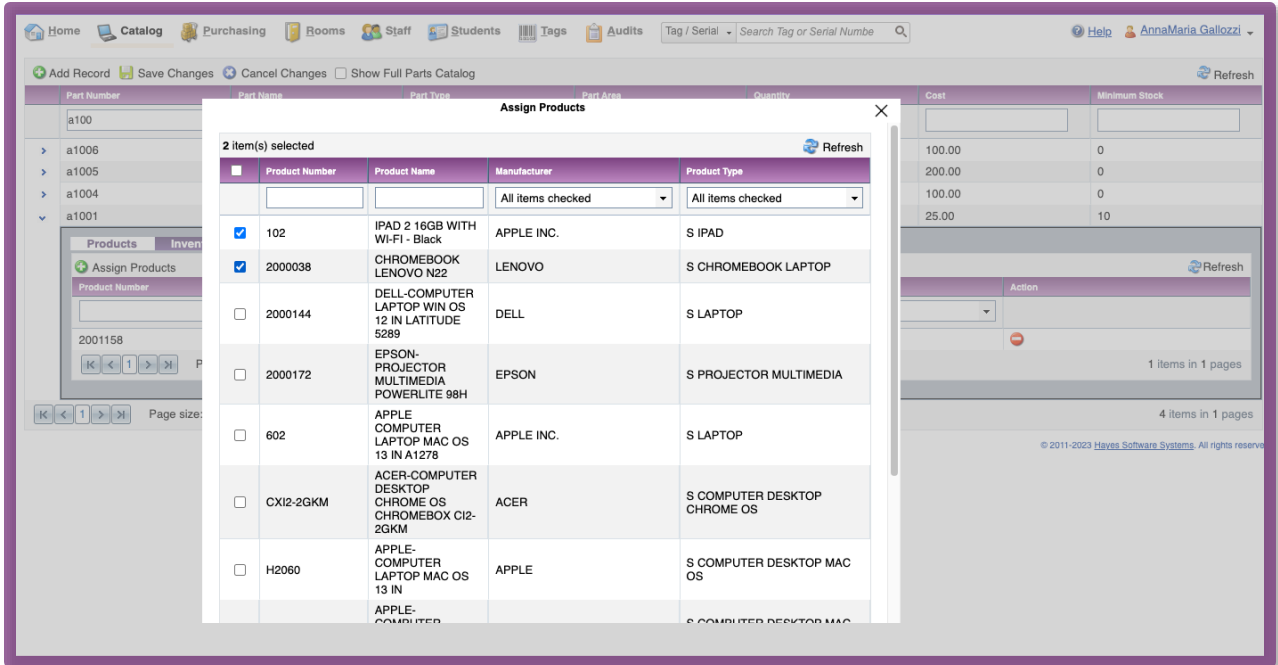
## Products Tab

- If the site user has permission to Assign Products, the button will be enabled and the modal will pop-up when clicked.
- If the user does not have permission to assign products, they will be able to view the product associations but not assign products.
- Site users can only see the products from their own site, not all products.

Part Number	Part Name	Part Type	Part Area	Quantity	Cost	Minimum Stock
a100						
> a1006	Battery	Chromebook	Technology	5	100.00	0
> a1005	Bus Tires	Bus	Transportation	4	200.00	0
> a1004	Condenser Pad	HVAC	Maint	0	100.00	0
> a1001	Screen 13in	Chromebook	Technology	5	25.00	10

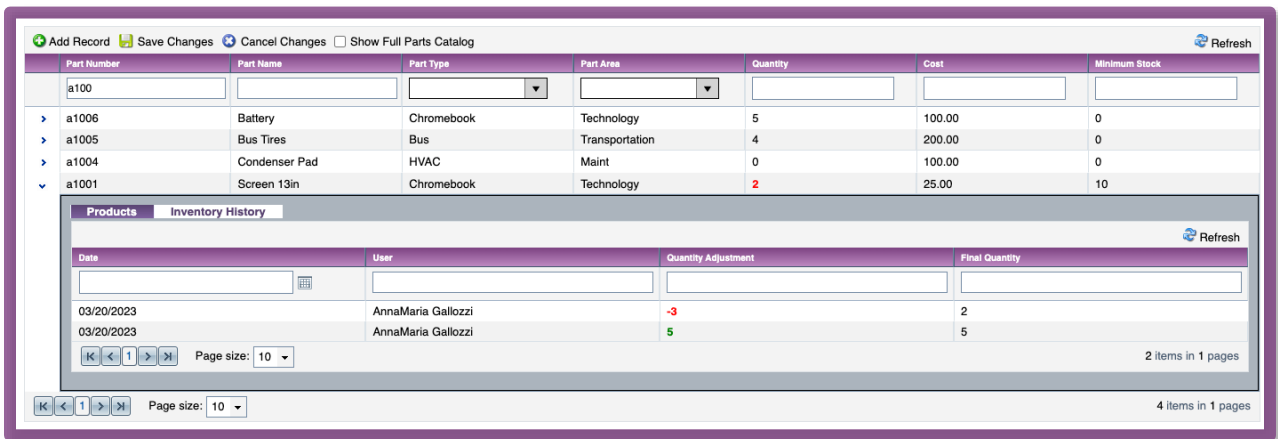
  

Product Number	Product Name	Product Type	Action
2001158	Dell Chromebook 11 SE	CHROMEBOOK	⊖



## Inventory History Tab

- The inventory history tab will show all adjustments made to the Parts inventory quantity: who made the adjustments, when they were made, and quantity count changes.
- The Inventory History tab will track the Date, User (First and Last Name), Site Name, Quantity Adjustment and Final Quantity of the Part.
- Negative adjustments are indicated in red and with a negative (-) sign
- Positive adjustments are indicated in green.





## Other Considerations:

- All parts will be added manually. Untagged items at a Warehouse site or Tagged items in inventory cannot be automatically converted to parts. There is no current process to upload excel spreadsheets to create parts.
- Minimum Stock, Cost, Quantity searches are dependent on the user clicking away from the box after hitting enter. The user can click anywhere outside of the search box.
- Special Characters are not searchable
- Upcoming features of Parts Management we plan to tackle in 2023:
  - Email notifications for Minimum Stock Alerts
  - Importing Parts in Bulk
  - Editing Parts in Bulk
  - Reporting

## 2.TIH-821 District Settings: Access API and SSO documentation

The Admin Admin role has access the API secret key and can create SSO documentation to help with the setup of your purchased SSO solution. Support will still help with set up questions, but you now have quick access to technical documentation for your district IDP administrator to begin the process.

- Log in as an Admin Admin on the Admin View to navigate to “District Settings” on your left navigation panel.
- When “Manage District Settings” opens, navigate to “API and SSO Information”.

**Manage District Settings** ✕

Application Settings	▼
Inventory Management Settings	▼
Notification Settings	▼
User Role Settings	▼
Transfer Settings	▼
Warehouse Transfer Request Settings	▼
API and SSO Information	▲

**The API Secret displayed below is to connect to the Frontline Asset Management Rest API. The data accessed by the API are tags distributed to Staff or Students and the statuses associated with them.**

**API URL**  
<https://www.tipwebstaging.com/TIPWebAPI/>

Secret Key	Passphrase	
*****	*****	Show

## API

- By clicking “Show” next to the “Secret Key” and “Passphrase” the information needed to authenticate to the Frontline Asset Management REST API will display.
- After the information has been shown, it can be hidden again.

REST API provides you with programmatic access to your data in Frontline Asset Management (formerly TIPWeb-IT). The flexibility and scalability of REST API make it an excellent choice for integrating with your other applications and for performing complex operations on a large scale. However, understanding and using REST API requires basic familiarity with software development, web services, and the Frontline Asset Management user interface.

You can use any tool or development environment that can make REST requests. If you have many records to process, consider using this API which is based on REST principles and optimized for large sets of data.

Access API documentation here: <https://apidocs.tipwebhss.com/>

Read, write, update or delete operations performed using the API on the customers instance are executed on the live, production database and in real-time. Any changes made to the instance and its database will take effect immediately and are irreversible.

Please contact [Frontline Customer Support](#) for guidance on the API.

## SSO Documentation

- You can generate SSO documentation to walk you through how to configure SSO for your system based on the IDP and protocol your district uses.
- Once your Domain, Idp and Protocol have been entered, clicking Generate Documentation will navigate you to a webpage with setup instructions specifically for your selections.

**API and SSO Information**

The API Secret displayed below is to connect to the Frontline Asset Management Rest API. The data accessed by the API are tags distributed to Staff or Students and the statuses associated with them.

**API URL**  
<https://www.tipwebstaging.com/TIPWebAPI/>

**Secret Key**      **Passphrase**

T!PWeb!T@pp      This Is Used TIPWeb IT      Hide

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**SSO Documentation**

Use the form below to generate SSO documentation.

**Domain \***      **Idp \***      **Protocol \***

frontlineed.com      
 ✓ Please Select  
 ADFS  
 Azure  
 Google  
 Classlink  
 Generic
       Please Select ▾      Generate Documentation

Required field.

To generate your appropriate documentation, you will first need to understand you IDP and what Protocol you have. Below is a table of the supported IDPs and Protocols.

IDP	Protocol	Group Setup/Information
ADFS	<ul style="list-style-type: none"> <li>• SAML</li> <li>• WsFed</li> </ul>	Groups configured can pull over for users through SSO
Azure	<ul style="list-style-type: none"> <li>• SAML</li> </ul>	If you are using Groups in Azure, the same groups must be set up in your Active Directory (AD)
Google	<ul style="list-style-type: none"> <li>• SAML</li> </ul>	Google groups are not configured to pull over into Asset Management SSO
Classlink	<ul style="list-style-type: none"> <li>• SAML</li> </ul>	When configuring Classlink, please have your Classlink technical rep prepared to meet with Frontline and your district. They are the only person who can configure and send your groups to Asset Management
Generic	<ul style="list-style-type: none"> <li>• SAML</li> </ul>	For RapidID, we will need the meta data to come over

### Changing Existing SSO Setup

If you already have SSO configured for your Asset Management Site and you want to change your SSO provider, please make sure to know your IDP and Protocol. Please be sure to follow the steps on the generated document to ensure your IDP configurations are accurate to eliminate troubleshooting time. After you generate your documentation, you should reach out to [Frontline Customer Support](#) for guidance on next steps and timing of the transition.

### New SSO Setup

If you are a new customer wanting to configure your purchased SSO, speak with your implementation manager after you generate your documentation. Please be sure to follow the steps on the generated document to ensure your IDP configurations are accurate to eliminate troubleshooting time.

We will help you switch over or configure your SSO. The SSO configuration can take one full day for Frontline to configure. **During the setup time no one from the district should log into the system. If someone logs in during the set up or switch it will create a duplicate user.** If a duplicate user is created, we will need to extend the lockout longer to clean up duplicates.

## 3.TIH-1 Reconciled Tags on Transfers: Notes & print Transfer Ticket

In our 12.4 release, we introduced how to reconcile tags on transfers. When an audit is created and a tag is on the audit and a transfer, reconciliation will remove or complete tags on transfers when tags on the transfer site no longer match the origin site of the transfer.

1. On the audit, during reconciliation, if a tag is on a transfer the transfer will be completed if the destination site matches the audit site and the transfer is in "In Transit" or "Receiving"
  2. On the audit, during reconciliation, if a tag is on a transfer the transfer will be removed if the destination site does not match the audit site and the transfer is in "In Transit" or "Receiving"
  3. On the audit, during reconciliation, if a tag is on a transfer the transfer will be removed from the transfer when the transfer is in the status of "New", "Submitted" or "Pending Approval".
- To enhance this feature, we have added the ability to track what was removed from a transfer in two spots.
  - The first report you can access to view tags that have been removed from a transfer due to an audit reconciliation is under transfer history on the left side navigation.

- Once you have navigated to transfer history, click on the scroll.

**Transfer History** ✕

Show Completed Please Select Transfer Report... Refresh

Transfer Number	Created Date	Origin Site	Destination Site	Status	Actions
49412	03/08/2023	#Pari01	TR_Warehouse	Submitted	
49411	03/07/2023	Ken Site 5	Ken Site	Complete	
49410	03/01/2023	938 Advanced Academic Services	#Pari01	Complete	
49409	02/27/2023	Pari	000 General	Complete	
49408	02/17/2023	Ken Site	Ken Site 2	New	
49407	01/27/2023	000 General	003 New Tech at B.F. Darrell	New	
49406	01/26/2023	014 Samuell High	Newsite02	Receiving	
49405	01/25/2023	014 Samuell High	000 General	New	
49404	01/25/2023	TH01_Warehouse	000 General	In Transit	
49403	01/25/2023	TH01_Warehouse	000 General	In Transit	

Page size: 10 57545 items in 5755 pages

- The scroll will open the transfer ticket with a Note added of Tags that have been removed from the transfer due to an audit reconciliation.

**Transfer Ticket**

Transfer Number: 49406  
 Created By: kirithi  
 Date Printed: 03/08/2023  
 Date Created: 01/26/2023  
 Last Edited By: kirithi  
 Last Edited On: 01/26/2023  
 Pickup Date: 01/26/2023

<b>From:</b> 014 Samuell High 8928 Palisade Dr. Dallas, TX 75217-2099	Contact: Phone: 972-892-5100 Driver: kirithi	<b>To:</b> Newsite02	Contact: Phone: Driver: kirithi
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Approved By: kirithi, kirithi Approved On: 01/26/2023

**Notes**  
 01/26/2023 System: 1 tag(s) have been collected as part of the audit reconciliation.  
 Tag(s) removed from the transfer are:  
 ABC01

**Tagged Inventory on Transfer**

1 -Man Sled	Product Type: ATHLETIC
<b>Tag</b>	<b>Serial</b>
ABC03	199

- There are two other places on the actual transfer that will alert the user that tags have been removed during reconciliation. At the top of the transfer and in transfer notes as highlighted below.
- Viewing the transfer will display a Note added of Tags that have been removed from the transfer due to an audit reconciliation.

The screenshot displays the 'Initiate Transfer' window. It is divided into two main sections: 'Transfer Details' and 'Actions'. The 'Transfer Details' section shows the following information:

- Transfer #: 49406
- Type: Site to Warehouse
- Status: Receiving
- Destination: Newsite02

The 'Actions' section contains a 'Print Transfer Ticket' button.

Below these sections is a progress bar with six stages: Submitted, Approved, Scheduled, In Transit, Receiving, and Completed. The first five stages are marked with green checkmarks, while the 'Completed' stage is marked with a grey checkmark. A red box highlights a message below the progress bar: '1 tag(s) have been collected as part of the audit reconciliation.' To the right of this message is an 'Expand all' link.

Below the progress bar are three expandable sections: 'Tagged Inventory on Transfer', 'Untagged Inventory on Transfer', and 'Transfer Notes'. The 'Transfer Notes' section is currently expanded, showing a text area for 'Enter Transfer Notes' and a save icon.

At the bottom of the window, a system message is displayed in a yellow box, also highlighted with a red border: 'System 1/26/2023 10:51:38 AM 1 tag(s) have been collected as part of the audit reconciliation.'