



Asset Management

Admin View Training Manual

July 2022

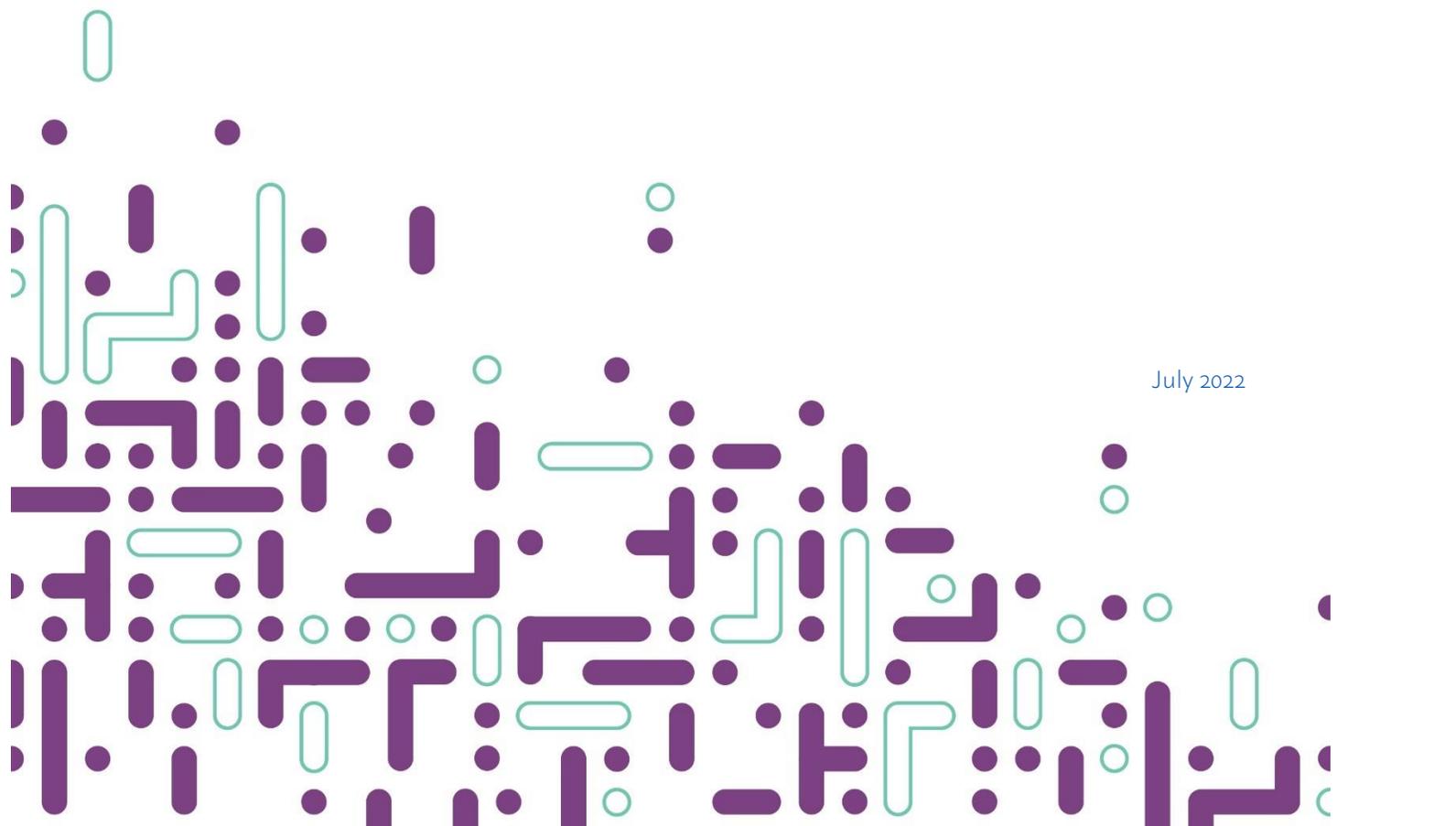


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Hello & Welcome

... to the Frontline Asset Mgmt. application!

If you are reading this, you have in your hand what we hope will prove to be a very useful training guide as well as a reference guide to assist you in answering the questions you have on a daily basis about the functionality of Asset Mgmt..

For twenty plus years, Frontline has been training persons just like you in the use of our software solutions for school administrators. We have made it our business to understand the instructional technology issues and challenges you face on.

If you are attending one of our hands-on or webcast training sessions, you are being led by one of our experienced training staff. Our trainers are proficient in Asset Mgmt. and will be able to offer you real life examples and processes to assist you in applying the application to your situation.

This training manual is divided into three sections:

- 1. Need to Know** (white pages)
those topics for which you need a basic understanding to begin using the Asset Mgmt. administrative view
- 2. Nice to Know** (yellow pages)
those topics that will further enhance your use of Asset Mgmt.'s more advanced functions
- 3. In the Know** (blue pages)
helpful overview information and definitions for each main page within the application

Don't Wait! Ask us!

This is your training time and we want you to get the most from it.

If you have a question, please do not hesitate to ask it right away.

Our trainers feel comfortable taking questions as you have them.

Don't let that question you have go unasked!

Continued on next page

Each page of this training manual has information which quickly categorizes where in the application the content discussed on that page can be found. Located on the upper right-hand side of each page, there are icons and a written path directly under the icon.

The page header icons are listed below and symbolize the following Asset Mgmt. areas:



For more information regarding different Asset Mgmt. areas, see the In the Know section of this training manual.



NOTES

NOTES



Asset Mgmt. Application Overview



FIRST THINGS FIRST

Pin Point Instructional Technology with Tags

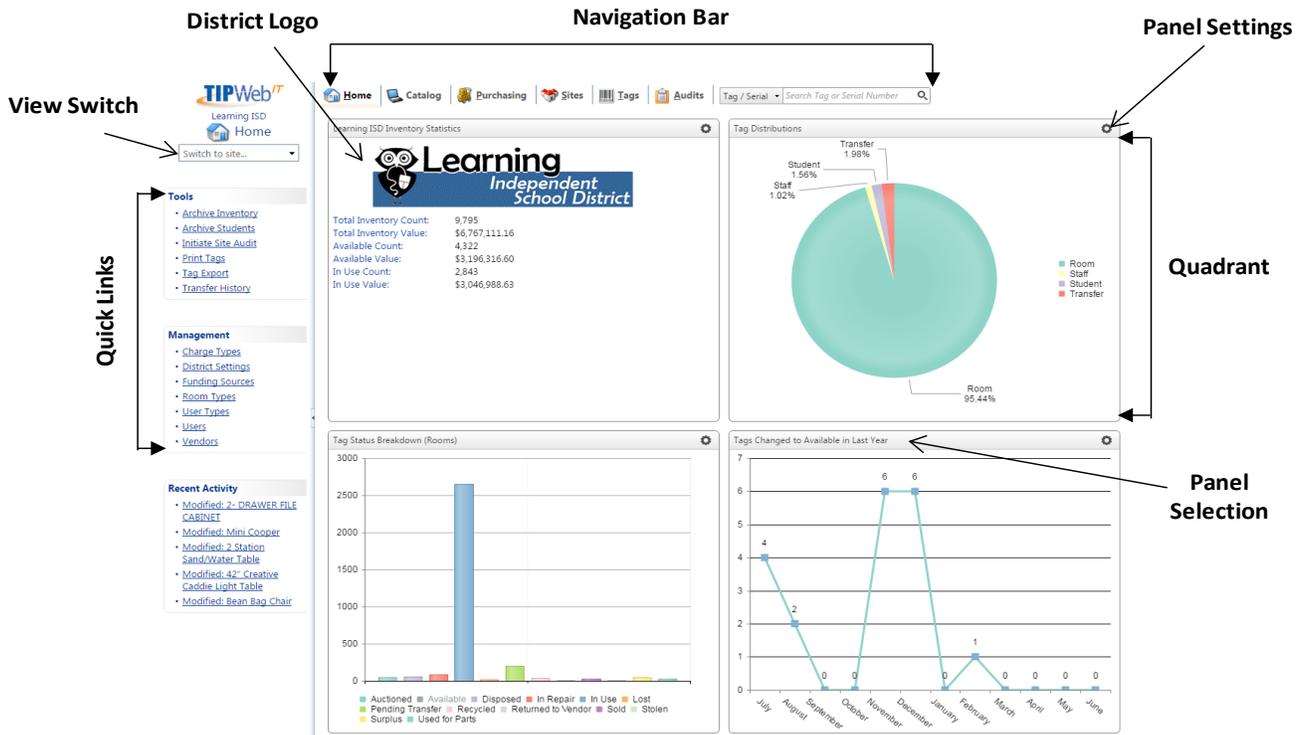


NOTES

FIRST THINGS FIRST



Administrative View Dashboard



Navigation Bar provides access to the main sections of Asset Mgmt.

District Logo district provided jpg or gif image (400 pixels wide by 100 pixels tall) on all Asset Mgmt. user's home screen - admin view and site view

View Switch provides quick access to other sites within the district (based on user settings)

Quick Links provide areas of control respective to the Asset Mgmt. section

Learning Center link to access training materials and videos

Panel Settings option for users to customize dashboard panel view including statistics, notifications, and/or alerts

Panel Selection displays panel selection for each quadrant



Interface Introduction

The screenshot shows the Asset Management application interface. At the top, there is a navigation menu with options like Home, Catalog, Purchasing, Sites, Tags, Audits, and a search bar for Tag / Serial. Below the navigation is a grid of asset data. The grid has a header with columns: Product Number, Product Name, Manufacturer, Model, Product Type, Other #1, and Price. The grid contains several rows of data, including items like '13, 4/4 CELLO HAPSBURG', '410 SLICER, ST& BRAKE', and '10-unit Notebook Storage Cart'. The grid is annotated with labels: 'Grid Header' points to the top row of the grid; 'Grid Data' points to the rows of data; 'Grid Filters' points to the filter icons in the header; 'Reports' points to a dropdown menu in the top right; 'Grid Counts' points to the text '208 items in 21 pages' at the bottom right; 'Page Size Display' points to a dropdown menu showing 'Page size: 10'; and 'Grid Pagination' points to the navigation buttons at the bottom left.

Grid Header labels and provides sorting abilities for the columns/filters respective to the grid data

Grid Data displays data in a framework made up of columns and rows respective to the Asset Mgmt. section

Grid Pagination allows reviewing of grid data in manageable portions

Page Size Display allows different grid sizes to display various amounts of data and can be set to remember the user's size preference per grid

Reports displays the available reports respective to the Asset Mgmt. section

Grid Filters allows you to reduce the grid data's results to display only the content you filter

Grid Counts displays the total items and pages based on selections



Common Icons

We will introduce the specific meanings of all icons used in each area of Asset Mgmt.. Many icons appear frequently throughout the application. The following are the most common icons:

-  **Add** – adds something in regards to the area of Asset Mgmt. in which you are located
-  **Edit** – opens the selected item/individual/area to edit any applicable data
-  **Save** – saves selected information to be accessed at a later time
-  **Custom Product Field** – mouse over this icon and it provides additional information regarding the reviewed item
-  **Accessories** – mouse over this icon and it provides the accessories issued (clickable to allow for editing issued quantity, if applicable)
-  **Notes** – mouse over this icon and it provides any notes entered
-  **Refresh** – refreshes the Asset Mgmt. area and returns the current screen to its original state
-  **Print** – opens a PDF version of the data you wish to view with the option to view, save, and/or print the respective data
-  **Lock** – locks the data entered into the respective data field in order to prevent the information from changing
-  **Unlock** – allows the respective data field to be altered with new data
-  **Search** – engages the search function

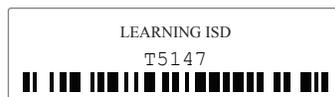
Did You Know?

Blue Grid Headers are clickable and sort the grid's data (ascending or descending) by the grid header item selected.

What are Tags?

Tags are the unique identifiers used to track items in Asset Mgmt.. Tags are affixed to each item you wish to track.

Tags can be your district's currently affixed asset tags (unique identifiers) or the tags available to print within Asset Mgmt..



Each Asset Mgmt. tag measures 1/2" x 1 3/4" and have barcodes for ease of tracking. 80 tags are printed per sheet of labels (Avery Label #5167 or OnLinelabels.com OL25LP).



Did You Know?

The tag number/
bar code is the key to
recording the location
of an item.

It is important to use
good quality tags.

The Avery 5167
is a paper label.
The OL25LP from
Onlinelabels.com is
a durable polyester
label that works well
for items not handled
every day (like a ceiling
mounted projector).

**For items handled on
a daily basis, such as
laptops or tablets,
invest in a more
durable metal tag.**

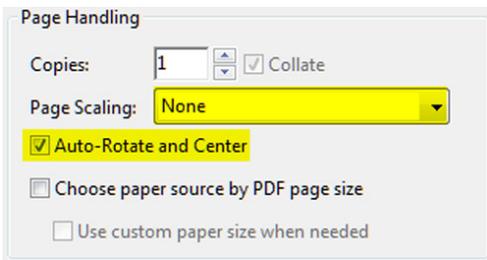


Print New Tags

1. Click on **Print Tags**, located on the Quick Links **Tools** menu.



2. The **Tag Header** of the tag is customizable. Insert the desired text (consult the Administrative Administrator before making changes).
3. Click on **Preview Tags** to test print the label alignment on a sample sheet. If the labels are misaligned, close the preview and use the **Margin Offset** controls to adjust them until they are printing correctly.
4. Enter the number of **Tags** you wish to print in the **Print Quantity** field.
5. Click on **Print Final Tags**.
6. Click on the PDF reader's print icon, review the print window, and click OK (see note →).



7. Click **Done** to close the **Print Tags** window.

IMPORTANT!

To print **Asset Mgmt. Tags**, the computer you are using must have a PDF reader installed.

If you are using **Adobe® Reader®** version 10 or higher, make sure the **Page Sizing & Handling** setting is:

- **Size Options** must be set to **Actual Size**.

If you are using **Adobe® Reader®** any version prior to version 10, make sure the **Print Screen's Page Handling** settings are as listed below.

- **Page Scaling** must be set to **None**.
- **Auto-Rotate and Center** must be **checked**.

Tag/Serial Search Introduction

Tag/Serial Search is located on the top navigation bar. It allows a user to search for a specific Tag and review details regarding that Tag.

When search for a **Tag** the **Tag Information** window opens. The user has the option to **Change Location** by selecting the dropdown arrow and selecting either **Collect**, **Room Transfer**, or **Quick Return**. User will be redirected based on selection.

The **Tag Information** window provides five tabs of data: **Detail**, **Status History**, **Audit History**, **Components**, and **Attachments**.

» The **Detail** tab provides current tag information, including:

Tag Details

- Tag Number
- Serial Number
- Site
- Location
- Status
- Asset Type
- Scan Date
- RFID
- Custom Field Info
- Tag Notes

Funding Info

- Source
- Order Number
- Funding Source
- Account Code
- Vendor
- Purchase Date
- Purchase Price
- Expiration Date
- Asset UID

Product Info

- Product
- Product Number
- Product Type
- Manufacturer
- Model
- Suggested Price
- Product Notes
- Product Image

- » The **Status History** tab provides the tag's location history within the district (including: Status, Source, Status Notes, Site, Destination, Scan Date, and Scan By)
- » The **Audit History** tab provides the tag's audit history (including: Tag Audit State, Audit Date, Created By, Expected Location, and Audit Location)
- » The **Components** tab allows the assignment of a tag to another tag, linking them in a parent/component relationship. The features and information on this screen are relevant to the respective tag's current Asset Type and relationship(s)
- » The **Attachments** tab provides a depository to save files related to the tag and information regarding the file (including: File Name, File Size, Notes, Date Attached, and Attached By). The Distribution Receipt once signature is accepted will be uploaded to the attachments tab. Click in the Tag Search field, located on the top navigation bar.

Did You Know?

Within the **Status History** tab, **Audit History** tab, and **Attachments** tab, the grids are sorted by the newest to oldest.

Therefore the most recent information will always be at the top of the respective grid.



Tag /Serial Search

To search by tag, the exact tag alpha/numeric digits are required. To search by serial number

1. Click in the **Tag/Serial Search** field, located on the top navigation bar.

2. Enter all or part of the tag/serial number (it can be made up of alpha and/or numeric characters).
3. Click on the **Tag/Serial Number** displayed in the list, or select the  **Search** icon.

Note: The search window will autocomplete as characters are typed into the field.

4. If you have entered part of a tag/serial number, the Results window will open and display a list of possible items matching the search data. The full tag/serial number is displayed in the list. Click on the desired item.
5. The **Tag Information** window will appear and display the details of the tag.
6. If you wish to search for another tag, use the **Tag Search** field located at the top of the **Tag Information** window and repeat steps 2 through 4.

Note: to search for a serial number, exit back out to the main page and repeat steps 1 through 4.

7. Click on  to close the **Tag Information** window.

Did You Know?

Within the **Tag Information** window, you may have an icon to the right of a field.

This icon is clickable and will take you to the respective location displayed.

Most of these icons will only appear if the tag is located on the site you are logged into.

Staff/Student Search

To search by **Staff** or **Student** Name or ID at least three (3) alpha and/or numeric digits are required.

1. Click on the dropdown arrow next to the **Tag/Serial Search** on the top navigation bar and select **Staff** or **Student**.



2. Enter all or part of the **Staff/Student** ID or name (it can be made up of alpha and/or number characters). 
3. Click on the ID/Name displayed in the or select the **Search** to expand.
4. If you have entered part of a name or ID the **Results** window will open and display a list of possible items matching the search data. The full name or ID is displayed in the list. Click on the desired item.
5. The **Staff/Student** Information window will appear and display details.
6. Click on  to close the **Staff/Student** Information window.



Untagged Items

Districts traditionally do not tag every item purchased. This means there are untagged items on sites throughout the district.

Asset Mgmt. captures transfer quantities for untagged products during the **Transfer** process (to and from sites).

The district level administrator designates if a product (within the Catalog) can be treated as untagged inventory. Only these products will be allowed to ship quantities as untagged.

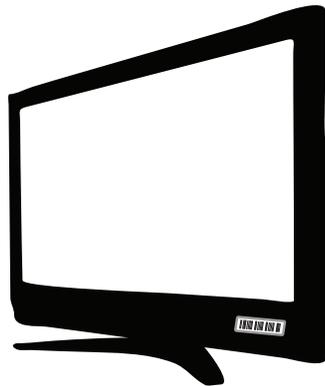
Common untagged items include:

- Chairs/Desks/Tables
- Filing Cabinets
- Chalk boards/White Boards
- Old Equipment
- Trash Cans

Untagged:



Tagged:



Did You Know?

Warehouses allow for untagged storage and reporting.

This is in addition to the untagged quantities identified during a site to site transfer.

*See the **Nice to Know** section of this training manual for more information about setting up and using **Warehouses**.

Add Users

Users are the individuals who are granted access to Asset Mgmt..

1. Click on Users under **Management Quick Links**.
2. Click on  **Add Record**.
3. Enter the new user's details. Red fields are required information. Choose a **User Role** respective to their position.
4. Move respective sites over to the **Assigned Sites** area for this user.
5. Click on  **Save**.

Limit Permissions for Sites

Only **Administrative Administrators** can limit access rights to site level individuals. Permissions can be set for the following areas: **Catalog, Purchasing, Rooms, Staff, and Students**.

1. Click on **Users** under **Management** Quick Links.
2. Search for the desired site level individual.
3. Click on  **Manage User Permissions**, located on the user's row. This opens the **Permissions** window.
4. Deselect the desired permission settings for the individual.
5. Click on  **Save**.

Did You Know?

A Asset Mgmt. site user can be assigned to multiple sites.

Within the **Assigned Sites** field, the first site listed is the site user's primary site.

The site user will view switch to any additional assigned sites.

Districts utilizing the **Warehouse** feature will also need to identify **Drivers** in the **Users** screen.

Drivers manage the shipments to and from warehouses.

*See the **Nice to Know** section of this training manual for more information about setting up and using **Warehouses**.

True or False

In pairs or small groups, read the following statements and circle whether the statement is true or false.

- | | | |
|--|------|-------|
| 1. The Learning Center is required in order to use Asset Mgmt.. | TRUE | FALSE |
| 2. The clickable blue grid headers only sort the grid data in ascending order. | TRUE | FALSE |
| 3. Asset Mgmt. Tags have barcodes on them and are scannable. | TRUE | FALSE |
| 4. The Quick Links section of the screen is collapsible. | TRUE | FALSE |
| 5. After limiting the data in a grid through filtering,  Refresh refreshes the respective grid area and returns the current screen to its original unfiltered state. | TRUE | FALSE |
| 6. Asset Mgmt.  Help will open in another browser window. | TRUE | FALSE |
| 7. The Reports drop down menu is located above the blue grid headers in the top left-hand corner of a majority of Asset Mgmt. screens. | TRUE | FALSE |
| 8. Recent Activity , located at the bottom of the Quick Links area, displays the last several areas of Asset Mgmt. which were modified by the user. | TRUE | FALSE |

DISTRICT PREFERENCES



District Wide Preferences Check List

An Administrative Administrator user can set several district encompassing preferences. Ask yourself the following questions when deciding which preferences to set:

APPLICATION SETTINGS:

HOME PAGE IMAGE.

- Do you want to display the district's logo on the Asset Mgmt. home page?**
 - No, leave blank. - no action
 - Yes - Quick Links > District Settings > Application Settings
 - Select **Browse and then Upload Image** to display the desired image

TIMEOUT CONTROL

- Do you want to increase the timeout control from 15 to 30 minutes?**
 - No, leave at 15 minutes. - no action
 - Yes - Increase to 30 minutes. Quick Links > District Settings > Application Settings
 - Select **30 Minutes** from the dropdown menu

INVENTORY MANAGEMENT SETTINGS:

INVENTORY TRANSACTION HISTORY FOR ROOMS, STAFF, AND STUDENTS.

- Do you want to hide older data regarding collected/returned tag transaction history from showing up on receipts and inventory history screens?**
 - No, show all transactions in the status of returned, even if the items were returned years ago. - no action
 - Yes - Quick Links > District Settings > Inventory Management Settings
 - Select **Show After the Following Date** and select the desired date

Continued on next page 

NOTES

DISTRICT PREFERENCES



STUDENT INVENTORY DATA.

- Do you want items issued to students at one campus to follow them to a new campus within the district?**
 - No - no action
 - Yes - Quick Links > District Settings > Inventory Management Settings
 - Select **Automatically Transfer Student Inventory Data**

AUDITS.

- Do you want the district to be able to reconcile the audit without site approval/denial?**
 - No - no action
 - Yes - Quick Links > District Settings > Inventory Management Settings
 - Select **District Only**
- Do you want to prevent a site user from synching tags denoted as found across all open district created audits?**
 - No - no action
 - Yes - Quick Links > District Settings > Inventory Management Settings
 - Select **Allow Manual Synchronization of Found Items Across Open Audits that have been Reconciled**
- Do you want to prevent a site user from performing an audit on an individual tag when they are in possession of the tag ?**
 - No - no action
 - Yes - Quick Links > District Settings > Inventory Management Settings
 - Select **Allow Quick Tag Verification on Tag Information Modal**
- Do you want to prevent a site user from collecting tags denoted as misplaced when scanned on an audit for that campus?**
 - No - no action
 - Yes - Quick Links > District Settings > Inventory Management Settings
 - Select **Disable Tags from Being Collected if Located at Another Site**

Continued on next page 

NOTES

DISTRICT PREFERENCES



TAG STATUS.

- Do you want the Police Report and Attachment to be required when the tag's status is changed to Lost?**
 - No - no action
 - Yes - Quick Links > District Settings > Inventory Management Settings
 - Select **Lost Status: Police Report # and Attachment Required**

- Do you want administrator approval when the tag's status is changed to Lost?**
 - No - no action
 - Yes - Quick Links > District Settings > Inventory Management Settings
 - Select **Lost Status Requires Approval**

- Do you want the Police Report and Attachment to be required when the tag's status is changed to Stolen?**
 - No - no action
 - Yes - Quick Links > District Settings > Inventory Management Settings
 - Select **Stolen Status: Police Report # and Attachment Required**

- Do you want administrator approval when the tag's status is changed to Stolen?**
 - No - no action
 - Yes - Quick Links > District Settings > Inventory Management Settings
 - Select **Stolen Status Requires Approval**

- Do you want to remove the option to select certain statuses for Site View users?**
 - No - no action
 - Yes - Quick Links > District Settings > Inventory Management Settings
 - Select **Enable/Disable Statuses for Sites and Departments**

Continued on next page 

NOTES

DISTRICT PREFERENCES



NOTIFICATION SETTINGS:

STATUS NOTIFICATIONS

- Do you want site users to receive on screen warnings when attempting to collect tags in the status of In Repair?**
 - No - no action
 - Yes - Quick Links > District Settings > Notification Settings
 - Select **Notify user when Collecting Tags that are In Repair**

USER ROLE SETTINGS:

SITE ADMINISTRATOR.

- Do you want all site administrators to transfer items from one room to another in bulk?**
 - Yes - no action
 - No - Quick Links > Settings > User Role Settings
 - Select **Restrict Bulk Room To Room Transfers**
- Do you want all site administrators to associate tags to purchase orders?**
 - Yes - no action
 - No - Quick Links > Settings > User Role Settings
 - Select **Restrict from Associating Tags to Purchase Orders**
- Do you want all site administrators to create new room audit results?**
 - Yes - no action
 - No - Quick Links > Settings > User Role Settings
 - Select **Restrict from Creating New Room Audits**
- Do you want all site administrators to edit product information on purchase orders created at the district level?**
 - Yes - no action
 - No - Quick Links > Settings > User Role Settings

NOTES

DISTRICT PREFERENCES



- Select **Restrict from Editing Products on a District Purchase Order**

- Do you want all site administrators to reconcile District initiated audit results?**
 - Yes - no action
 - No - Quick Links > Settings > User Role Settings
 - Select **Restrict from Reconciling District Initiated Audits**

- Do you want all site administrators to reconcile Finalized room audit results?**
 - Yes - no action
 - No - Quick Links > Settings > User Role Settings
 - Select **Restrict from Reconcile Site Initiated Audits**

- Do you want all site administrators to quickly transfer inventory from one site to another during the deactivation process for staff members?**
 - Yes - no action
 - No - Quick Links > Settings > User Role Settings
 - Select **Restrict Quick Transfers of Inventory when Deactivating Staff**

SITE USER.

- Do you want all site users to create new room audits?**
 - Yes - no action
 - No - Quick Links > Settings > User Role Settings > Site User
 - Select **Restrict from Creating New Room Audits**

- Do you want all site users to ship site to site transfers?**
 - Yes - no action
 - No - Quick Links > Settings > User Role Settings > Site User
 - Select **Restrict Shipping of Initiated Inventory Transfers**

NOTES

DISTRICT PREFERENCES



TRANSFER SETTINGS:

RESTRICTED FUNDING SOURCES:

- Do you want tags with a restricted funding source to be able to be deleted from the transfer ?**
 - No - No action
 - Yes - Quick Links > District Settings > Transfer Settings
 - Select **Enable Denied Asset Process**

REQUIRED TRANSFER APPROVALS FOR TRANSFERS: SITE TO SITE:

- Do you want the destination site's administrator to approve/deny each transfer waiting to be shipped to their site?**
 - No - No approval needed prior to shipping items to another site, no action
 - Yes - Quick Links > District Settings > Transfer Settings
 - Select **Initiated Transfers Require Approval**

- Do you want the destination site's administrator to approve/deny each transfer shipped and waiting to be received on their site?**
 - No - No approval needed to receive items shipped to a site, no action
 - Yes - Quick Links > Settings > Transfer Settings
 - Select **Inventory Received from a Site Requires Approval from Administrator**

- Do you want the user to capture a digital signature when conducting a transfer?**
 - No - No no action
 - Yes - Quick Links > Settings > Transfer Settings
 - Select **Transfers Require Digital Signatures to be Captured**

NOTES

DISTRICT PREFERENCES



REPORT SETTINGS:

COMPLIANCE REPORT TEXT

- Do you want to customize the Auto Compliance Report that outlines the outcome of an audit?**
 - No - no action
 - Yes - Quick Links > District Settings > Report Settings
 - Input your customized message.

DISTRIBUTION RECEIPT UPLOAD

- Do you want to automatically upload a signed distribution receipt to the respective student or staff member?**
 - No - no action
 - Yes - Quick Links > District Settings > Report Settings
 - Select **Automatically upload signed distribution receipts to student or staff member**
- Do you want to automatically upload a signed distribution receipt to the distributed tag?**
 - No - no action
 - Yes - Quick Links > District Settings > Report Settings
 - Select **Automatically upload signed distribution receipts to the distributed tag**

DISTRIBUTION RECEIPT LOGO

- Do you want to display the district's logo on the student/staff distribution receipt?**
 - No, leave blank. - no action
 - Yes - Quick Links > District Settings > Report Settings
 - Select **Browse and then Upload Image** to display the desired image

NOTES



Application Settings

Settings allows the administrative level to set a preference which affects each site's **Home Page Image**.

Home Page Image



This preference sets a logo district wide on the application Dashboard for each view and campus within the district.

The window must be refreshed for changes to be implemented.

The logo displays district-wide. Everyone logging into Asset Mgmt. within your district will see the logo.

Hint: Preferred pixel size of logos is 400x100 pixels.

1. Click on **District Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens.
2. Under **Home Page Image**, Click Browse to locate the desired file. Click on the **file name**.
3. Click **Open** to add file.
4. Click **Upload Image**.
5. Click the  **Save** icon. The confirmation message **All preference changes have been saved** appears.
6. Click on  to close the **Manage District Settings** window.



Application Settings

Settings allows the administrative level to set a preference which affects each site's **Timeout Control**.

Timeout Control

The **Timeout Control** allows the district to change the time it takes for the application to timeout due to the user being idle.

An administrator is able to keep the default idle timeout of 15 minutes or may extend to 30 minutes. The setting change affects all users within the district.



1. Click on **District Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens.
2. Under **Timeout Control**, click the dropdown arrow next to **Idle Timeout**.
3. Click the  **Save** icon. The confirmation message **All preference changes have been saved** appears.
4. Click on  to close the **Manage District Settings** window.

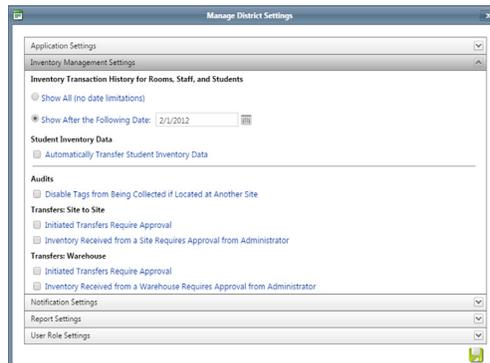
Inventory Management Settings

Settings allows the administrative level to set a preference which affects each site's **Student Transaction Receipts**, **Staff Transaction Receipts**, and the **Inventory History** screens for students, staff, and rooms.

Inventory Transaction History for Rooms, Staff, and Students

This preference sets a district wide preference to display inventory assigned to rooms, students and/or staff after a specified period of time. This hides returned transaction history the district deems unnecessary to display and/or print out on receipts and inventory history screens.

1. Click on **District Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens with the **Inventory Transaction History for Rooms, Staff, and Students** section open.



2. Select **Show After the Following Date**.
3. Click on the **calendar tool**. An interactive calendar opens.
4. Search for and select the **desired date**.
5. Click  **Save**. A success statement displays.
6. Click on  to close the **Manage Settings** window.

Did You Know?

In Use, **Lost**, and **Stolen** inventory will continue to show regardless of date constraints.

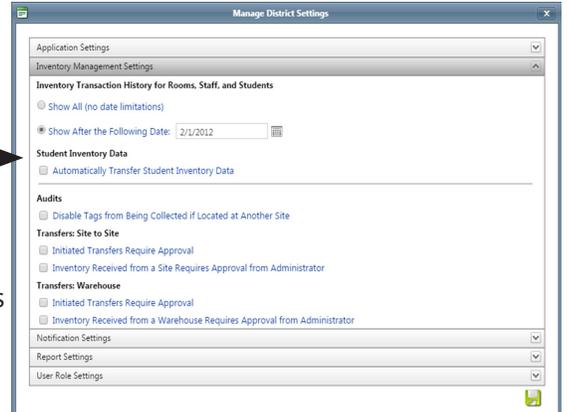
The default setting is set to **Show All (no date limitations)**.

Inventory Management Settings

Settings allows the administrative level to set a preference which affects each site's **Inventory Management**.

Student Inventory Management

This preference sets a district wide preference to automatically transfer student issued inventory items to the student's new campus. This means the items issued to the student at a previous campus will now be part of the new campus' inventory and no longer the previous campus' inventory.



1. Click on **District Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens.
2. Click on **Inventory Management Settings** to expand this section.
3. Select **Automatically Transfer Student Inventory Data**.
4. Click  **Save**. A success statement displays.
5. Click on  to close the **Manage District Settings** window.

Did You Know?

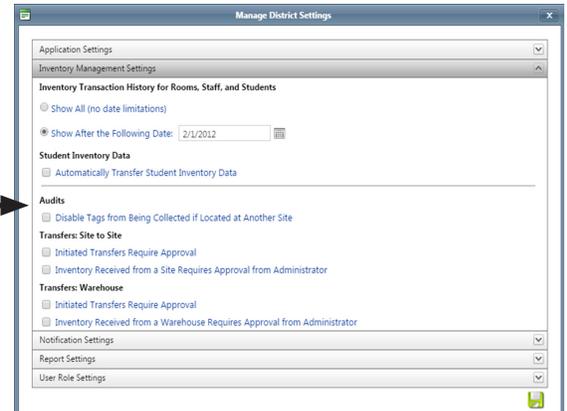
After clicking **Save** for this preference, the transfer of student issued items will occur with the next student information system import, usually run each night.

Inventory Management Settings

Settings allows the administrative level to set a preference which affects each site's **Inventory Management**.

Set Approvals for Audits

This preference affects the reconciliation of tags during an audit, such as who must approve the audit, when a tag must be scanned during an audit, and whether or not a tag can be collected. The preference can be toggled on and off.



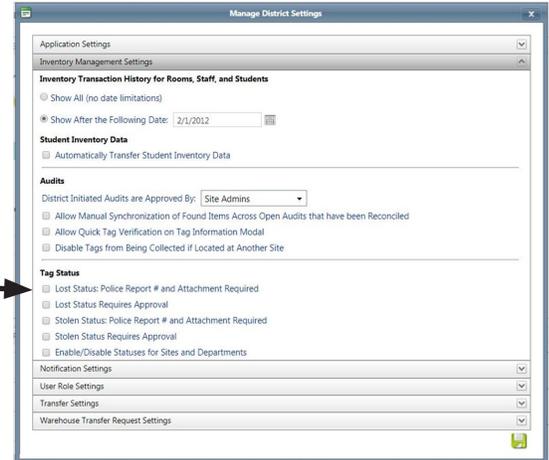
1. Click on **District Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens.
2. Click on **Inventory Management Settings** to expand this section.
3. Select the desired settings:
 - **District Initiated Audits are Approved By Site Admins** enables the destination site's administrator to approve/deny each transfer waiting to be shipped from another site.
 - **District Initiated Audits are Approved By District Only** enables the the district to reconcile the audit without site approval/denial.
 - **Allow Manual Synchronization of Found Items Across Open Audits that have been Reconciled** enables tags across all open district created audits to be synchronized.
 - **Allow Quick Tag Verification on Tag Information Modal** enables the the district to reconcile the audit without site approval/denial.
 - **Disable Tags from Being Collected if Located at Another Site** prevents the user from complete the Collect action for that tag in the stature of Misplaced if the expected location is at a different site
4. Click  **Save**. A success statement displays.
5. Click on  to close the **Manage Settings** window.

Inventory Management Settings

Settings allows the administrative level to set a preference which affects each site's **Inventory Management**.

Set Approvals for Tag Status

This preference affects tags that are Lost or Stolen. The preference can be toggled on and off.



1. Click on **District Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens.
2. Click on **Inventory Management Settings** to expand this section.
3. Select the desired settings.
4. Click  **Save**. A success statement displays.
5. Click on  to close the **Manage District Settings** window.

Did You Know?

When selecting **Police Report # and Attachment Required**, the Police Report # and Attachment are required when a tag's status is changed to **Lost** or **Stolen**.

When selecting **Requires Approval**, when selected, approval by an administrator is required when a tag's status is changed to **Lost** or **Stolen**.

Notification Settings

Site level individuals can collect a tag in the status of **In Repair** to a room. This process changes the tag's status to **Available**.

Enabling this setting provides sites with an on screen notification asking if they wish to proceed with collecting the **In Repair** tag.

1. Click on **District Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens.
2. Click on **Notification Settings** to expand this section.
3. Under the **Notification Settings** area, select the desired restriction from the available list.



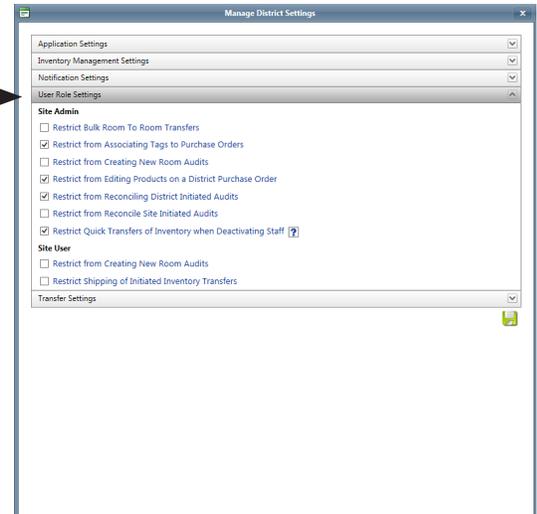
4. Click  **Save**. A success statement displays.
5. Click on  to close the **Manage Settings** window.



User Role Settings: Site Administrators

The **Site Admin** view within the **Management District Settings** window allows an **Administrative Administrator** to set a district wide preference for all **site administrator** roles.

1. Click on **District Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens.
2. Click on **User Role Settings** to expand this section.
3. Under the **Site Admin** section, select the desired restriction(s) from the available list.



- **Restrict Bulk Room To Room Transfers** removes the ability for site administrators to transfer items from one room to another in bulk.
- **Restrict from Associating Tags to Purchase Orders** removes the ability for site administrators to associate tags to purchase orders.
- **Restrict from Creating New Room Audits** removes the ability for site administrators to create new room audits.
- **Restrict from Editing Products on a District Purchase Order** removes the ability for site administrators to edit product information on purchase orders created at the district level.
- **Restrict from Reconciling District Initiated Audits** removes the ability for site administrators to reconcile District initiated audits

Continued on next page

DISTRICT PREFERENCES



Asset Mgmt. > Admin View > Quick Links

- **Restrict from Reconcile Site Initiated Audits** removes the ability for site administrators to reconcile Finalized room audit results.

- **Restrict Quick Transfers of Inventory when Deactivating Staff** restricts site admins from quickly transferring inventory from one site to another during the deactivation process for staff members.

4. Click  **Save**. A success statement displays.
5. Click on  to close the **Manage District Settings** window.

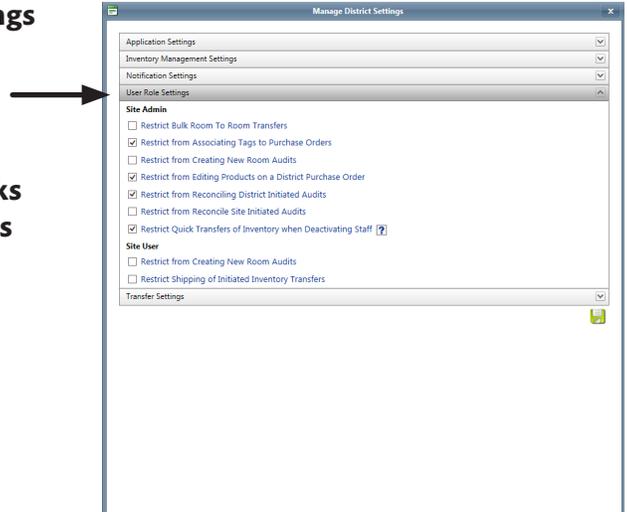
NOTES



User Role Settings: Site Users

The **Site User** view within the **Management District Settings** window allows an **Administrative Administrator** to set a district wide preference for all **site user** roles.

1. Click on **District Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens.
2. Click on **User Role Settings** to expand this section.
3. Under the **Site User** section, select the desired restriction(s) from the available list.



- **Restrict from Creating New Room Audits** removes the ability for site users to create new room audits.

- **Restrict Shipping of Initiated Inventory Transfers** removes the ability for site users from placing a site to site initiated transfer in the status of In Transit.

4. Click  **Save**. A success statement displays.
5. Click on  to close the **Manage District Settings** window.

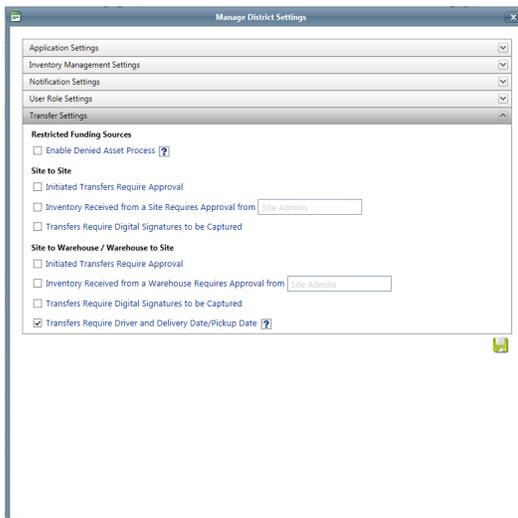
Transfer Settings

Settings allows the administrative level to set a preference which affects each site's **Transfer Settings**.

Approvals for Restricted Funding Sources

These preferences affect tags with a restricted funding source. If selected, tags with a restricted funding source cannot be deleted by the approver. Instead, they are marked as 'denied' and removed from the transfer but are still displayed on the transfer, itself.

1. Click on **Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens.
2. Click on **Transfer Settings** to expand this section.
3. Under the **Restricted Funding Sources** area, select the desired restriction from the available list.



4. Click  **Save**. A success statement displays.
5. Click on  to close the **Manage District Settings** window.

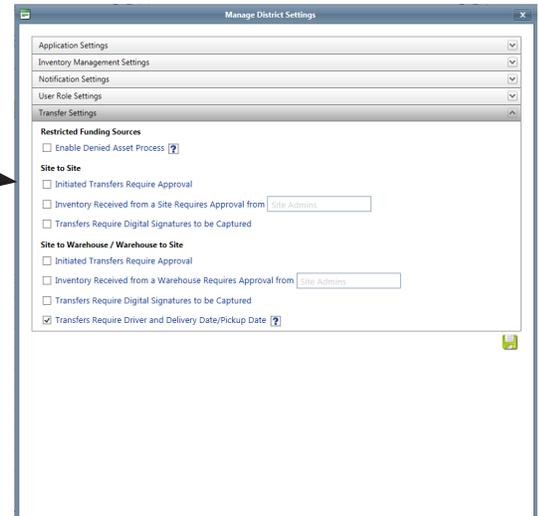


Transfer Settings

Settings allows the administrative level to set a preference which affects each site's **Transfer Settings**.

Approvals for Site to Site Transfers

These preferences affect site to site transfers. If both site and warehouse are selected, the destination site reviews a transfer at two different times (once before it is put in transit and once after the transfer has arrived at the site). Destination site administrators review each transfer in order to deny or approve (the whole transfer or specific line items) the shipment to their site.



1. Click on **Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens.
2. Click on **Transfer Settings** to expand this section.
3. Select the desired settings:
 - **Initiated Transfer Require Approval** enables the destination site's administrator to approve/deny each transfer waiting to be shipped from another site.
 - **Inventory Received from a Site Requires Approval from Site Administrator** enables the destination site's administrator to approve/deny each transfer shipped and waiting to be received on the destination site.
 - **Inventory Received from a Site Requires Approval from District Only** enables the district administrator to approve/deny each transfer shipped and waiting to be received on the destination site.
4. Click  **Save**. A success statement displays.
5. Click on  to close the **Manage District Settings** window.

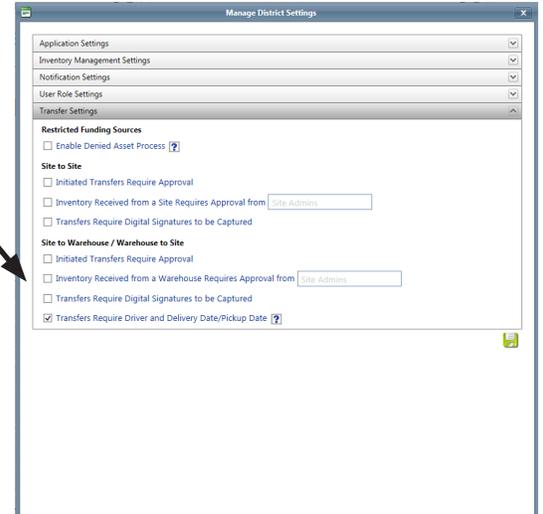


Transfer Settings

Settings allows the administrative level to set a preference which affects each site's **Transfer Settings**.

Approvals for Transfers Involving Warehouses

These preferences require at least one warehouse to be created in Asset Mgmt. and they will affect transfers involving warehouses. If both site and warehouse are selected, the destination site reviews a transfer at two different times (once before it is put in transit and once after the transfer has arrived at the site). Destination site administrators review each transfer in order to deny or approve (the whole transfer or specific line items) the shipment to their site.



1. Click on **District Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens.
2. Click on **Transfer Settings** to expand this section.
3. Select the desired settings:
 - **Initiated Transfer Require Approval** enables the destination site's administrator (warehouse or site) to approve/deny each transfer waiting to be shipped.
 - **Inventory Received from a Warehouse Requires Approval from Site Admin** enables the destination site's administrator to approve/deny each transfer shipped and waiting to be received on the destination site.
 - **Inventory Received from a Warehouse Requires Approval from District Only** enables the district administrator to approve/deny each transfer shipped and waiting to be received on the destination site.
4. Click  Save. A success statement displays.
5. Click on  to close the **Manage District Settings** window.

Did You Know?

Warehouses allow for untagged storage and reporting.

This is in addition to the untagged quantities identified during a site to site transfer.

*See the **Nice to Know** section of this training manual for more information about setting up and using **Warehouses**.



Report Settings

For districts who issue one to one devices to students and staff, it may be important to assign the **distribution receipt** to the **item/tag** in addition to the **student/staff** member.

This is established by selecting the “**Automatically upload signed distribution receipts to the distributed tag**” found under **Distribution Receipt Upload at Report Settings**. To activate this functionality, select the **check box**.

1. Click on **Report Settings** located on the **Quick Links Management** menu. The **Manage District Settings** window opens.
2. Click on the **Distribution Receipt** to expand this section.
3. Under the **Distribution Receipt Upload** area, specify the desired selections.

The screenshot shows the 'Manage Report Settings' window with the 'Distribution Receipt' section expanded. Under 'Distribution Receipt Upload', the checkbox 'Automatically upload signed distribution receipts to student or staff member' is checked, while 'Automatically upload signed distribution receipts to the distributed tag' is unchecked. The 'Distribution Receipt Logo' section shows a 'Browse' button and the LISD logo. The 'Distribution Receipt Text' section has a dropdown menu set to 'Students' and a rich text editor containing the following text:

As the Custodian for equipment being received, I am responsible for the following:

1. Ensuring all equipment is used for approved District purposes and not for personal gain.
2. Exercising "reasonable care" for equipment safekeeping.
3. Ensuring equipment is in good working condition or equipment maintenance needs are met.
4. Ensuring equipment is assigned/used by a responsible person who has been made aware of his/her respective responsibilities for property and is properly trained in its use and pertinent safety issues.
5. Ensuring equipment is accessible at all time for audit purposes.

4. Click  **Save**. A success statement displays.
5. Click on  to close the **Manage District Settings** window.



Getting Started Check List

To begin tracking your tagged products in Asset Mgmt., district specific data elements need to be created.

As you create the required data management areas within Asset Mgmt., it is suggested to add as much information in the optional fields as possible.

ADMINISTRATIVE VIEW

- Catalog Screen**
 - Product Types
 - Custom Fields
 - Manufacturers
 - Vendors
 - Funding Sources
 - Areas
 - Products
 - Images
 - Accessories
- Sites Screen**
 - Site Types
 - Sites
- Users Screen**
- Print Tags**
- Room Types**
- Charge Types**

SITE VIEW

- Rooms Screen**
 - Rooms

Did You Know?

Warehouses allow for untagged storage and reporting.

This is in addition to the untagged quantities identified during a site to site transfer.

*See the **Nice to Know** section of this training manual for more information about setting up and using **Warehouses**.



Add Product Types

Product Types is defined as the description of the different types or groups of products. This is similar to the categories online stores organize their products because they have varies manufacturers for the same kind of device.

For example, you may want to include a product type of laptop, calculator, desktop, white board, cell phone, etc...

BEST PRACTICE: Even if the district currently tracks just one product within a product type, create the product type using the generic term anyway.

In the future, newer models of the same brand may be purchased and/or a change in purchase preferences may be approved and the product will no longer be the only product within the **Product Type**.

1. Click on  **Catalog**, located on the top navigation bar.
2. Click on **Product Types** under **Management Quick Links**.
3. Click on  **Add Record**.
4. Enter the name of the **Product Type**.
5. Click on  **Save**.
6. Click on  to close the **Product Types** window.



Add Custom Fields

Asset Mgmt. allows you to create up to four **Custom Fields**. The custom field created for the respective **Product Type** allows you to denote specific information per tag.

For example, you may wish to know the operating system installed on each desktop computer, or you may wish to track which of your laptops are instructional or non-instructional.

1. Click on  **Catalog**, located on the top navigation bar.
2. Click on **Product Types** under **Management Quick Links**.
3. Click on  **Edit**.
4. Within the **Add Custom Field** box, enter the name of the **Custom Field**.
5. Use the **Field Type** drop down menu to select the new custom field's data type.
 - Boolean (True/False)
 - DateTime (Date and Time)
 - Double (Money)
 - Integer (Number)
 - Percent (Percent)
 - String (Text)
6. To make the custom field required each time a tag is issued for this product type, click on the **Required Field** check box. If you do not wish to make the custom field required, leave it empty.
7. Click on  **Add Custom Field**.
8. To add additional custom fields to this product type, repeat steps 5 through 8.
9. Click on  to close the **Manage Product Types** window.

Did You Know?

Asset Mgmt. allows you to remove a custom field for a particular product type up **until the point a tag has been issued** using the respective product type.

When you click on  **Edit** for the product type, if a  **Delete** icon appears to the right of the custom field. You may delete the custom field.

If the  **Delete** icon is not present, a tag has already been issued using this product type and the custom field may now contain data.

Therefore, you can **no longer delete** it.



Add Manufacturers

Manufacturers is a list of companies to which the products in Asset Mgmt. are associated. For example, companies like: Dell, Apple, and/or Sony.

1. Click on  **Catalog**, located on the top navigation bar.
2. Click on **Manufacturers** under **Management Quick Links**.
3. Click on  **Add Record**.
4. Enter the name of the **Manufacturer**.
5. Click on  **Save**.
6. Click on  to close the **Manage Manufacturers** window.

Add Vendors

A **Vendor** is an individual or a company who provides goods or services to your district (similar to a supplier).

1. Click on **Vendors** under **Management Quick Links**.
2. Click on  **Add Record**.
3. Enter the new vendor's details. Red fields are required information.
4. Click on  **Save**.
5. Click on  to close the **Manage Vendors** window.

Add Funding Sources

Funding Sources are the identifiable sources which represent a sum of money or other financial resources used to purchase an item. When adding a product to an existing purchase order, Asset Mgmt. requires a funding source be selected.

1. Click on **Funding Sources** under **Management Quick Links**.
2. Click on **Add Record**.
3. Enter the name of the new funding source. Red fields are required information.
4. Click on **Save**.
5. Click on to close the **Manage Funding Sources** window.

Note: Users have the capability to search for funding sources by utilizing the search field within the **Manage Funding Sources** window.



Add Areas

Areas is a generic area where all the tags attached to the product is associated. For example, microscopes are assigned to the “science” area and will never be associated with any other area.

1. Click on **Areas** under **Management Quick Links**.
2. Click on **Add Record**.
3. Enter name of the **Area**.
4. Click on **Save**.
5. Click on to close the **Manage Areas** window.

Did You Know?

Districts sometimes have a couple funding sources requiring increased management of tags associated with the funding source (such as: e-Rate).

Asset Mgmt. allows an additional site to site transfer approval process for tags associated with the respective funding source before they can be moved from one site to another.

*See the **Nice to Know** section of this training manual for more information about setting up and using **Restricted Funding Sources**.



Add a Product

Products are the items district administrators have entered (either imported during the implementation process or added manually) into Asset Mgmt..

This creates an application wide accessible product catalog.

NOTE: If a product's items are not going to be tagged and tracked by the tag's unique identifier, select the **Allow Untagged** field to enable this feature. This allows the product to be tracked by quantity on site to site transfers across the district.

Product Naming Convention Best Practices: For ease of searching and consistency use the product manufacturer and model within the Product Name. Example: 'Dell Latitude E5500'.

NOTE: Spacing affects the naming convention.

1. Click on  **Catalog**, located on the top navigation bar.
2. Click on  **Add Record**.
3. Enter the Product details. Red fields are required information.
4. Click on  **Save**.

Did You Know?

Duplicating an existing product is a time saving feature when adding similar products to Asset Mgmt..

A duplicated product must have a different **Product Name** and **Product Number** than the original product.

To duplicate a product, search for the product you wish to duplicate.

Click on  **Duplicate** located on the respective product's row. Rename/edit the **Product Name** to differentiate it from the original product you chose to duplicate.



Add an Image to a Product

Images are pictures associated with a product and are displayed in the product catalog. Valid image file extensions are jpg, jpeg, gif, png, and bmp.

Images are specific to the product, not the product type, and can be added on-the-fly within a product's details tab.

1. Click on  **Catalog**, located on the top navigation bar.
2. Filter for and click on the product to which you wish to add an image. The product row turns yellow.
3. Click on  **Edit** in the respective product's row.
4. Next to the **No Image Selected** box, click on  **Edit**.
5. Click on  **Add Record**.
6. Enter the new **Image Name** and **Description**, if desired.
7. Click on **Select** to locate the desired image.
8. Search for the saved image, select it, and click **Open**.
9. Click on  **Assign**. The new image will replace the **No Image Selected** box.
10. Click on  **Save**.

Did You Know?

Images can be found by conducting an internet search for the respective product.

Once found, right-click your mouse and save the image to your computer (choose a location where you can locate it from within Asset Mgmt.).

If an image cannot be found online, a digital photograph can be taken and used (valid image file extensions are jpg, jpeg, gif, png, and bmp).

The size limit of the image cannot exceed 75 kb.



Add a New Accessory

Accessories are optional items that may be issued along with the product when it is issued to an individual. An example of an accessory for a laptop might be a power adaptor or a laptop messenger bag.

1. Click on  **Catalog**, located on the top navigation bar.
2. Filter for and click on the product to which you wish to add an accessory. The product row turns yellow.
3. Click on the **Accessories** tab.
4. Click on  **Assign Accessories**.
5. Click on  **Add Record**.
6. Enter the **Name** of the accessory and the number of **Units** issued per product issued. These are required fields.
7. Enter **Description**, **Price** and if this accessory is **Consumable**, if desired.
8. Click on  **Add and Assign**. This simultaneously adds the new accessory to the accessory list and assigns it to the selected product.
9. Click on  to close the **Manage Accessories** window.



Assign an Existing Accessory

1. Click on  **Catalog**, located on the top navigation bar.
2. Filter for and click on the product to which you wish to add an accessory. The product row turns yellow.
3. Click on the **Accessories** tab.
4. Click on  **Assign Accessories**.
5. Filter for the desired accessory.
6. Verify the **Units** number (this reflects how many of this accessory will be issued per product issued). Edit the **Units** field, if necessary.
7. Click on  **Assign**.
8. Click on  to close the **Manage Accessories** window.



Merge Existing Products

Merging existing products is a way to clean up the product listing within the Catalog, to eliminate duplicate and incorrect entries.

1. Click on  **Catalog**, located on the top navigation bar.
2. Search for the product you wish to merge into another. This is referred to as the **Origin** product.
3. Click on  **Merge** located on the respective product's row.
4. Select or search for a Product to Merge Into ( / ).
5. Select  **Manage Custom Fields**.

Note: If the origin product has custom fields associated to it, decisions on how to incorporate them into the existing product must be made.

- a. For Custom Fields, select the **Select Matching Custom Field(s)** in which the new merged product will contain.
 - b. Select **Remove Custom Field** if the field is no longer needed.
6. Select  **Final Confirmation**.
 7. Select  **Go**.
 8. Type **Merge** in the confirmation field.
 9. Click **Confirm**.



Add Site Types

Site Types are general categories used to identify different kinds of sites within your district. Examples of Site Types include: Elementary Campus, Middle School Campus, Administration, etc...

1. Click on  **Sites** located on the top navigation bar.
2. Click on **Site Types** under **Management Quick Links**.
3. Click on  **Add Record**.
4. Enter the new site's details. Red fields are required information.
5. Click on  **Save**.
6. Click on  to close the **Manage Site Types** window.

Add Sites

Sites allows you to add the locations (sites) to which you will issue and account for items. It is helpful to enter as much site related information into Asset Mgmt. as you have available.

1. Click on  **Sites** located on the top navigation bar.
2. Click on  **Add Record**.
3. Enter the new site's **Site ID**, **Site Name**, and **Site Type** and provide additional information regarding this site, if desired.

Red fields are required information.

4. Click on  **Save**.

Did You Know?

If you are in a school system in which the state assigns ID's to sites/campuses, it is best practice to use this ID when creating a site in Asset Mgmt..

For all other sites, use your own numbering scheme.

Asset Mgmt. will not allow the duplication of Site IDs.



Add Room Types

Room Types are general categories used to label different kinds of rooms within a site.

Examples of Room Types might include: Classroom, Computer Lab, Storage, etc...

1. Click on **Room Types** under **Quick Links Management**.
2. Click on  **Add Record**.
3. Enter the new room type's details. Red fields are required information.
4. Click on  **Save**.
5. Click on  to close the **Manage Room Types** window.

Add/Edit Rooms

1. **View Switch** to the desired site.
2. Click on  **Rooms**, located on the top navigation bar.
3. Click on  **Add Record** or click on  **Edit**. for the desired room.
4. Enter/Edit the room's details. Red fields are required information.
If you wish to assign this to a **Room Type** which is not currently listed in the drop down menu, you may edit and/ or create a **Room Type** by clicking on  **Manage Room Types** to the right of the **Room Types** field.
5. Click on  **Save**.

Did You Know?

Organizing rooms by **Room Type** allows filtering/sorting the site's list of rooms by the established **Room Types**.

Also, when creating **Site Audits**, **Room Type** is an available filter to utilize.



Add Charge Types

Charge Types are the categories of charges sites utilize in assessing an item when it has been damaged and/or before an item is issued. All charges require the selection of an established **Charge Type**.

Examples include: Re-Image Fee, Damage and Protection Insurance, Security Deposit, Cracked Screen, etc...

1. Click on **Charge Types** under **Management Quick Links**.
2. Click on  **Add Record**.
3. Enter the new charge type's details. Red fields are required information.
4. Click on  **Save**.
5. Click on  to close the **Manage Charge Types** window.

Did You Know?

There are three optional settings for each **Charge Type**. They are:

Show Percentages:

When selected this will display four calculations based on the respective product's suggested price multiplied by 100%, 75%, 50%, and 25%.

Allow Price Change:

When selected this will allow the site user to increase/decrease the charge type's default charge amount.

Tag Required:

When selected this will require the site user to identify which tag this charge is assigned.

Match Terms to Definitions

In pairs or small groups, match the terms to the definitions.

- | | | | |
|-----------------|-----------|-----------|--|
| Scan Date | 1. | ___ | When checked, allows a search for and view of products or sites marked as inactive |
| Tag Number | 2 | 1. | The date a tag was last issued or a change of status occurred |
| Expiration Date | 3 | ___ | The description of the different types or groups of products |
| Product Number | 4 | ___ | An auto generated field, however, the administrative level has the option to enter their own number |
| Location Type | 5 | ___ | A date calculated by subtracting the Purchase Date of the tag by the district's assigned Projected Life (number of years) to the respective product |
| Consumable | 6 | ___ | Includes Rooms, Staff, and Students |
| Product Type | 7 | ___ | Unique identifier affixed to each item (which could be a district asset tag and/or a Asset Mgmt. created number) and used to track individual items within Asset Mgmt. |
| Show Inactive | 8 | ___ | A yes or no designation indicating if an accessory is expected to be returned when the respective tag/item is collected (established by a district administrator) |

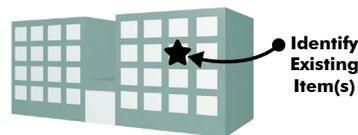


Inventory Introduction

Before an item can be issued to an individual or show up on a room inventory report, it must first be issued a tag and a room location on a site.

There are three ways to issue items to rooms on a site. They are:

1. Initialize -



Example: a mounted ceiling projector which was purchased years ago

Initializing a room is the process by which you tell Asset Mgmt. where each currently owned item is located within a site. This process is most commonly used when entering items currently located in a room not yet tagged/tracked in Asset Mgmt..

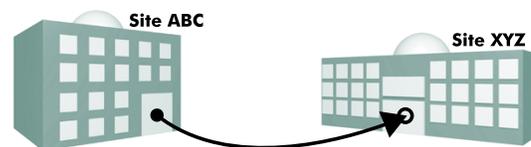
2. Purchase Orders -



Example: newly purchased computers for a computer lab

This process allows you to simultaneously record basic purchasing data (purchase order number, purchase date, vendor, funding source, and quantity), link tags to the newly acquired items, and issue them to the specified location (room) on a site.

3. Site to Site Transfers -



Example: site XYZ taking ownership of a laptop cart which was not being used on site ABC

This allows tagged items in the status of “Available” to be moved from one site to another site. The site which currently stores the items will initiate the transfer. The site the items will be moved to will receive the transfer.



Initialize Items to Rooms



The following steps require item tags.

1. **View Switch** to the desired site.
2. Click on  **Rooms**, located on the top navigation bar.
3. Using the **Rooms** filter, search for the desired room to which you wish to initialize products.
4. Click on  **Initialize Room Inventory** located on the room's respective row.
5. Select the **Funding Source** for the item you are initializing.
6. Locate the product in the printed product catalog and scan the **Product Number** barcode into the **Product Number** field OR click on  **Search** to find and select the desired product.
7. Select the **Status** of the item.

Available - assigns item to the room for the purpose of later issuing it to an individual or another room.

In Use - assigns item to the room with a status of "in use" making it unavailable to issue to a staff member or a student.

8. Locate the item's **Tag** and scan it into the **Tag** field.
9. If a serial number is required, enter the serial number of this item into the **Serial** field.
10. Once successfully initialized, the item appears in the **Scan History for Today** grid.
11. Click  **Done** to close the **Initialize Room Inventory** window.

Did You Know?

The **Product Catalog** is a complete listing of products within Asset Mgmt.. It has detailed information regarding each product, including a product number barcode from which to scan.

A print out of the **Product Catalog** will allow you to utilize a scanner during the initialization process in order to identify and quickly scan the product number.

Review a sample product catalog in the "In The Know" section of this training manual.

HOW IT GETS HERE



Purchasing Overview

The **Purchasing** page allows the administrative level or site administrator to create purchase orders, ship, receive, and assign items to rooms while simultaneously recording essential purchasing data (purchase order number, purchase date, vendor, funding source, and quantity).



Order Number	Purchase Date	Vendor	Status	Status	Status	Est. Delivery Date	Notes
PO32056	03/04/2015	All Things Digital	Open	Open	Open	03/04/2015	
PO 998877	06/09/2014	All Things Digital	Open	Open	Open		
PO 889977	06/09/2014	CDW	Open	Open	Open		
PO 778899	06/09/2014	CDW	Open	Open	Open		
PO 667799	06/09/2014	All Things Digital	Open	Open	Open		
RM6002-1	03/04/2013	All Things Digital	Open	Open	Open	03/29/2013	
RM53-1	02/25/2013	All Things Digital	Open	Open	Open	03/11/2013	
RM704-1	02/18/2013	Fry's	Open	Open	Open	03/04/2013	
RM32-1	01/07/2013	Nextag	Open	Open	Open	01/31/2013	
5700342	12/18/2012	Digitek	Open	Open	Open	02/01/2013	

Order Number	Purchase Date	Vendor	Status	Status	Status	Est. Delivery Date	Notes
PO32056	03/04/2015	All Things Digital	Open	Open	Open	03/04/2015	
PO 998877	06/09/2014	All Things Digital	Open	Open	Open		
PO 889977	06/09/2014	CDW	Open	Open	Open		

Purchase Order Number: PO 889977

Purchase Order #: Purchase Date:

Vendor: Est. Deliv. Date:

Status:

Notes:

A purchase order may contain multiple products. Items can be shipped to multiple sites.

Did You Know?

The administrative level may add items to any existing site created purchase order.

Site level administrators can create purchase orders and add products to purchase orders, in addition to the site users' ability to print purchasing tickets and scan items to rooms.

HOW IT GETS HERE



Completing a Purchase Order:

This check list is intended to help you identify the information needed to complete a purchase order within Asset Mgmt..

ADMINISTRATIVE VIEW

- Purchasing Screen**
 - Create a Purchase Order:
 - Verify each Product is in Asset Mgmt.
 - Verify the Vendor is in Asset Mgmt.
 - Verify necessary Funding Sources are in Asset Mgmt.
 - Adding a Product to a Purchase Order:
 - Product Number
 - Funding Source
 - Account Code, if desired
 - Purchase Price (per unit)
 - Ordered Quantity
 - Received Quantity (at district level), if desired
 - Receive a Product From a Vendor
 - Ship Product(s) to a Site (matching physical movement of the product)
 - Site ID
 - Quantity to Ship to Desired Site
 - Print/Send Asset Mgmt. Purchasing Ticket to Site
 - OPTIONAL: Receive Items for a Site
 - New/Never Used Tag Numbers
 - Room(s) to Receive Into
 - Close Purchase Order
 - Import Inventory

Did You Know?

There are two ways to bring items in through a Purchase Order.

- Create a Purchase Order and line items then scan tags when items are received.
- Create Purchase Order and Import all tags to site and location on the site.

NOTES



Create a Purchase Order

Creating a Asset Mgmt. purchase order requires the products and vendors, respective to the purchase order, to exist in your Asset Mgmt. data.

1. Click on  **Purchasing**, located on the top navigation bar.
2. Click on  **Add Record**.
3. Enter the **Purchase Order** details. Red fields are required information.
(The default status for a new purchase order is **Open**.)
4. Click on  **Save**.

Adding Products to a Purchase Order

1. Filter the **Purchasing** grid to locate the purchase order you just created.
2. Click on the respective purchase order's row. The grid expands.
3. On the Products tab, click on  **Add Record**.
4. Enter the **Product** details. Red fields are required information.
5. Click on  **Save**.
6. To continue adding products to this purchase order, follow steps 3 through 5.



Import Inventory to a Purchase Order

This process allows the Administrative level to import the details of a purchase order to the point of issuing to the room, staff, or student at a specified site or sites.

From Purchasing:

1. Click on  **Import Inventory**. The **Purchase Order Import Inventory Manager** window opens.
2. Click on Browse in the **Upload File** section, to locate the desired file. Click on the file name.

Hint: If your table has a header row, click on the box next to My table has headers. In the **Import Details** section the Required Fields line specifies the data fields required for a successful upload.

3. Click on Open to add the file.
4. Click on **Import**.
5. Under **Settings**, select the **Import To location** and **Active Sheet** from their respective drop down menus.
6. Identify **Product Name** and/or **Product Number** from their respective column drop down menus.
7. Click on **Detect Custom Fields**.

Custom fields will display in the **Required Fields** line and **Optional Fields** line of the **Import Details** section. If a custom field is required, it must be identified.

8. Under **Import Review**, set all required fields from their respective drop down menus.
9. Click on **Validate**. A success message will appear.
If the file does not pass validation, information about what needs correction is provided.
10. Click on **Finish**. The **Confirm Import** Window opens.
11. Click on **OK**.



Receive Product(s) From a Vendor

After creating a Asset Mgmt. purchase order and adding the respective products to the purchase order, Asset Mgmt. allows you to document the receipt of those products when they arrive from the vendor.

Products must be received before they can be assigned/shipped to sites.

1. Click on  **Purchasing**, located on the top navigation bar.
2. Filter the **Purchasing** grid to locate the desired purchase order.
3. Click on the respective purchase order's row. The grid expands.
4. On the **Products** tab, locate the desired product to receive.
5. Click on  **Receive**. The **Receive Quantity** window opens.
6. Enter the quantity received in the **Quantity** field.
7. Click on  **Save**. The **Receive Quantity** window closes and the **Received** column for the respective product is updated.



Ship Product(s) to a Site

After creating a Asset Mgmt. purchase order, adding the respective product(s) to the purchase order, and receiving the item(s) from a vendor, Asset Mgmt. allows you to ship those item(s) to a site or multiple sites.

1. Click on  **Purchasing**, located on the top navigation bar.
2. Filter the **Purchasing** grid to locate the desired purchase order.
3. Click on the respective purchase order's row. The grid expands.
4. On the **Products** tab, locate the desired product to ship.
5. Click on  **Ship to Site**. The **Shipping Management** window opens.
6. Enter the **Site ID** into the **Site** field (typing in the number requires clicking on Next).
-- OR --
Click on  **Search** to select the **Site ID**.
7. Enter the quantity to ship in the **Quantity** field.
8. Click on  **Save**. The grid on the **Shipping Management** window is updated.
9. If applicable, continue entering shipping quantities for other sites respective to this purchase order's selected product by following steps 6 through 8.
10. Click on  **Process Print Ticket** on the respective shipment's row. This changes the shipment status to **In Transit**.
11. Click on  **Print Ticket** to generate the PDF.
12. Using the PDF reader's controls, print the **Purchasing Ticket**.



Receive Items for a Site via Scanning Tags

After creating a Asset Mgmt. purchase order, receiving the item(s) from a vendor, and shipping those item(s) to a site, Asset Mgmt. allows an Administrative Administrator to receive those shipped items on behalf of the site.

A purchase order shipment to a site must be in the status of **In Transit** before items can be received to the respective site.

1. Click on  **Purchasing**, located on the top navigation bar.
2. In the **Order Number** field, enter/scan the purchasing ticket barcode for the purchase order number.
3. Click on the respective purchase order's row.
4. On the **Products** tab, locate or scan the purchasing ticket barcode for the desired product to receive.
5. Click on the respective product's row.
6. Click on  **Ship to Site**. The **Shipping Management** window opens.
7. Click on  **Scan Tag into Inventory** on the respective **In Transit** shipment row. The **Receive By Tag** window opens.
8. From the Room field's drop down, select the room into which to assign this product.

Did You Know?

By the time an item is received into a room from a purchase order, a unique tag should be placed on the item.

When applicable, **Purchasing Tickets** display additional information after a tag is received into a room within a site.

This includes: who received the tag to the room, when the tag was received, room the tag was received into, tag number assigned to the asset, and respective serial number of the asset.

Continued on next page 

HOW IT GETS HERE



9. Select the status of the product from the **Status** drop down menu.
 - Available** - assigns this item to this room for the purpose of later issuing it to an individual or another room.
 - In Use** - assigns this item to this room and designates it is unavailable to issue to another room, staff, or student.
10. If extra data is required, enter/scan the data into the respective field(s).
11. Locate the item's **Tag** and scan it into the **Tag field**.
12. If applicable, continue to scan all tags until the entire quantity of this product has been received (the **Room** and **Status** field will default to last user selected setting).
13. Once all items have been received, a success message will display to communicate receiving for this product is complete. Click **Done** to close the **Receive By Tag** window.
14. If applicable, continue to receive items for all respective **In Transit** shipments respective to this purchase order's selected product by following steps 6 through 12.

Did You Know?

HINT: Use the purchasing ticket barcodes to scan the purchase order number and the product number for each **In Transit** product.



Receive Items for a Site via Importing Tags

1. Click on  **Purchasing**, located on the top navigation bar.
2. Filter the **Purchasing** grid to locate the desired purchase order.
3. Click on the respective purchase order's row.
4. On the **Products** tab, locate the desired product to receive and click on the respective product's row.
5. Click on  **Ship to Site**. The **Shipping Management** window opens.
6. Click on  **Import Tags** on the respective **In Transit** shipment row. The **Receive By Tag Import Manager** window opens.
7. Review the **Import Details** box to verify the desired file contains data for each of the **Required Fields** and/or **Optional Fields**.
8. Browse and select the desired file by clicking on **Browse** (located in the **Upload File** box).
9. If the desired file does not contain a header row, deselect **My Table Has Headers** by clicking on the box.
10. Click on **Import**. The window refreshes with the file's data.
11. Select the active spreadsheet by using the **Active Sheet** drop down menu (located in the **Actions** box).
12. Assign each column's data type to the respective product's required/optional fields, using the drop down menus (in the blue grid header).
13. Click on **Validate**. This reviews the file for possible issues and reports those findings in the **Validation** box.

Did you Know?

This process allows the administrative level to receive items to a room located on the respective site by importing an **XLS** or **XLSX** file into Asset Mgmt..

The import process must contain the exact number of tags shipped to the respective site per product.

The file must contain the data for required fields (respective to the product and product type) as this process also requires the assignment of the status of the item (available or in use), assignment of the tag to the item, and assignment of any required custom field data.

Continued on next page 



14. When the validation message displays “Validation Successful!”, click on **Finish**. The **Confirm Import** window appears.
15. The message “You are about to finish your import. This action cannot be undone. Are you sure you want to finish your import?” displays. Click **OK**.
16. The import brings in the tags, closes the **Receive by Tag Import Manager** window, returns you to the **Shipping Management** window, and updates the respective site’s **Received Tags** count and Status.
17. Click **Done** to close the **Shipping Management** window.

Close a Purchase Order

A purchase order can be closed without processing all of the products within it. This does not effect editing, receiving from a vendor, shipping, and/or receiving existing products for a site in the closed purchase order.

Closing a purchase order locks it, preventing the addition of additional products and removing the ability to edit the details of the purchase order.

1. Click on  **Purchasing**, located on the top navigation bar.
2. Filter the **Purchasing** grid to locate the desired purchase order.
3. Click on  **Edit**.
4. Select **Closed** from the **Status** drop down menu.
5. Click on  **Save**.

Did You Know?

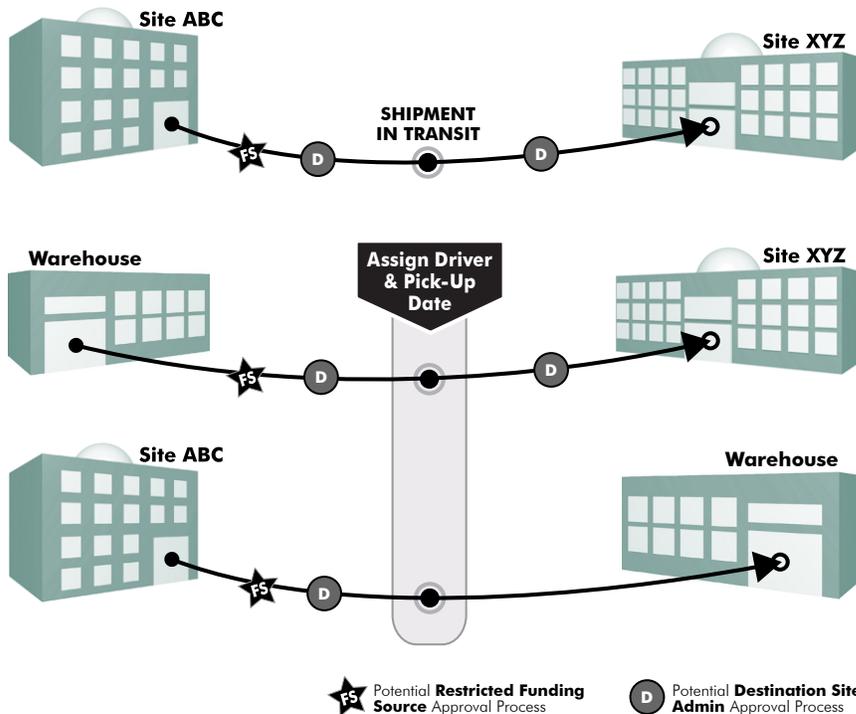
A district created purchase order will remain in the status of **Open** until an Administrative Administrator changes the purchase order status to **Closed**.

A site created purchase order will remain in the status of **Open** until all of the tags have been received to rooms or until an Administrative Administrator changes the purchase order status to **Closed**.

Once **Closed**, a purchase order has to be reopened by an Administrative Administrator.

Transfer Process Overview

Asset Mgmt. allows items to be moved from one site to another site through Site to Site Transfers. Warehouses are special kinds of sites. Below is an overview of the 3 ways a transfer can take place.



Approvals may be required for two reasons (established by the district level):

1. A district wide rule to require the **destination site's administrator(s) to approve** any items intended to be shipped to their site. It is possible for this approval process to occur twice before the transfer can be received by the destination site.
2. A restricted **Funding Source** is associated with one or more tags and requires the identified Asset Mgmt. user to approve its addition to the transfer in order to be shipped from its current location.

Did You Know?

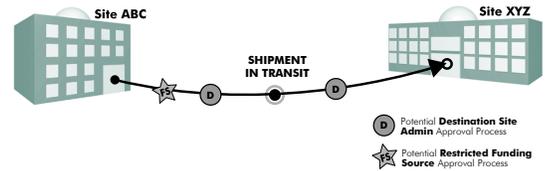
Driver Notifications on the **Home** page quickly communicate transfers assigned to the respective driver (includes alerts regarding warehouse deliveries and site pickups).

Clicking on a **Driver Notification** opens a window listing each respective transfer assigned to the driver.

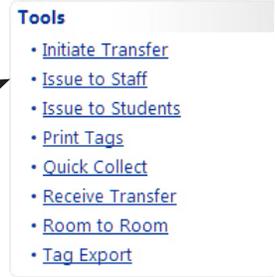
Initiate Transfer: Site to Site

Site to Site Transfers do not allow tags in the status of **Lost** or **Stolen** within a transfer. **Tag Search** or **Tags** screen will help you verify the item's current status.

NOTE: If the district has enabled **Restricted Funding Sources**, the district has identified users who can approve the inclusion of restricted funding source tags to a site to site transfer.



1. **View Switch** to the desired site.
2. Click on **Initiate Transfer** under Quick Links **Tools**.
3. Using the **Destination** field's drop down menu, select the site receiving the item(s).
4. Click on **GO** next to the **Destination** field.
5. For **tagged items**, scan or enter the **Tag Number** into the **Tag** field, located in the **Tagged Inventory to Transfer** section.
6. For **untagged items**, click on **Untagged Inventory to Transfer** to expand this section
7. Enter the product number in the **Product Number** field OR **Search** to select the desired untagged enabled product.
8. Enter the number to transfer into the **Quantity** field.
9. Click on **Add Untagged Inventory**.
10. Click **Submit Transfer** at the top right hand side of the **Initiate Transfer** window, located in the **Actions** section. This puts the transfer in the status of **Submitted**.



Did You Know?

A **site to site transfer** progresses through the following statuses from the time it is created until all items have been received:

- **New**
- **Submitted**
- **In Transit**
- **Receiving**
- **Complete**



Ship Transfer: Site to Site

Once you **Submit Transfer**, depending on the district level's preference settings, the transfer may be waiting for the destination site to approve the transfer and the transfer's status would be **Pending Approval**.

After the destination site approves the transfer or if an approval is not required, the next step is to prepare the shipment for transit and send it to the destination site.

BEST PRACTICE: Print the **Transfer Ticket** for the site to site transfer and include it with the physical shipment of items.

1. **View Switch** to the desired site.
2. Click on **Initiate Transfer** under Quick Links **Tools**.
3. Locate the desired transfer using the **Existing Transfer** grid filters.
4. Click **Select** on the respective transfer's row.
5. Click on **Print Ticket**.
6. Using the PDF reader's controls, print out the **Transfer Ticket**.
7. Click on **Ship Transfer**. This changes the transfer status to **In Transit**.

Did You Know?

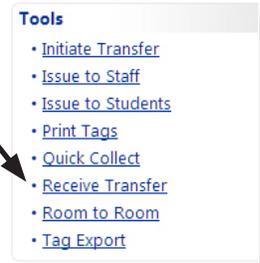
If approval of a site to site transfer is required, due to district level preference settings, the destination site's administrator(s) must approve or deny the transfer items.

If denied, the transfer returns to the **New** status.

If approved, the transfer is changed to the **Submitted** status.

Receive Transfer

Transfers can contain tagged and untagged items. Asset Mgmt. allows you to receive both kinds of items into their respective sections without leaving the **Receive Transfer** window.



1. Click on **Receive Transfer** under **Tools** Quick Links.
2. Scan/enter the **Transfer Number** located on the **Transfer Ticket**.

For Tagged Items:

3. For **Tagged items**, select the desired **Room** to place the item using the **Room** field's drop down menu.
4. Select the **Status** of the item(s) being received or select the **Use Tag Status Prior to Transfer**.
5. Scan or enter the **Tag Number** into the **Tag** field. If you manually enter the number, click on  **Receive** to issue this item to the selected room.
6. Continue to enter tag numbers until the  **Complete** icon turns green for each tagged product on the transfer.

For Untagged Items:

7. Enter the **Container Number** into the **Container** field.
8. Click on  **Receive**.
9. Continue to enter container numbers until the  **Complete** icon turns green for each untagged product on the transfer.
10. Click  **Done** to exit the **Receive Transfer** screen.

Did You Know?

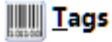
The **Transfer Ticket** contains all of the tag numbers in the respective site to site transfer.

These tickets can be used to help receive the transferred items into Asset Mgmt..

If you wish to print another copy of the **Transfer Ticket**, select  **Print Ticket** on the **Receive Transfer** screen.



Tags Grid: Filter Controls



Basic Filters, located at the top of the **Tags** grid, displays the most common fields for easy access when searching for tag information. This section provides two types of filter controls. They are:

- **Combo Dropdown** ▼ -
Displays when there are less than 25 items to select from
- **Auto Complete Box** 🔍 -
Entering text into the field provides results to select (displays when there are more than 25 items to select from)

Advanced Filters, located at the top of the **Tags** grid below the **Basic Filters**, displays all of the available search fields.

Tag List ?

Allows a user to filter by a specific tag. Tag numbers can be added by typing or scanning. Up to 500 tags can be searched at a time.

Combo Dropdown

Auto Complete Box

Tag List ?

Use **Add Expression** and/or **Add Group** to identify the desired filter(s). Link filter expressions and/or groups with the four And/Or Statements (including: And, Or, Not And, and Not Or).

Did You Know?

Site Name is the only required field.

A user must select at least one site to perform a search on the **Tags** page.



Tags Grid: Saved Search Criteria

Saving search criteria establishes a quick way to apply commonly desired search fields, column organization, and sort values to the Asset Mgmt. data.

NOTE: This process does not save the filtered data. It saves the settings established to apply to your data at will.

1. Click on **Tags**.
2. Select the desired filters, using the **Basic Filters** and/or the **Advanced Filters**.
3. Click . The screen refreshes and displays the respective tag information.
4. If needed, click on the **Edit Columns** (located above the **Tags** blue grid header) to toggle on/off the data fields to display within the **Tags** grid.
5. If desired, rearrange the data fields in the **Tags** grid by dragging and dropping the respective field's blue grid header.
6. If desired, single click on a field's blue grid header to sort the **Tags** grid ascending. Single click a second time to sort descending. Single click a third time to clear the sort.
7. Click **Save As**. The **Save Search As** window opens.
8. Enter the desired search criteria name in the **Search Name** field. (This name will be displayed in the **Saved Searches** window.)
9. Click **Save**. The screen refreshes and the saved search is listed.

Did You Know?

Any changes you wish to make to an existing saved search can easily be made.

Click on the respective saved search, make the desired changes and then click on **Save Search**.

A list of all existing saved searches are available in the **Saved Searches** window, just click on **Saved Searched** to launch this window.



Bulk Edit Tag Information

Bulk Edit, located above the blue grid header bar of the Tags grid, allows a district administrative user to edit multiple tags at once.

1. Click on **Tags**, located on the top navigation bar.
2. Filter the **Tags** grid to display the desired tags to be edited.
3. The **Tag Information** window will appear and display the details of the tags.
4. Click on **Bulk Edit**. The **Bulk Edit** window opens. The number of **Tags Selected to Edit** is displayed in the upper left hand corner of this window.
5. Choose the field with the respective tags' information to edit in the **Select Field Name** drop down menu.
6. Enter the respective data or choose from the available options in the **Update Records To** field.
7. Click on **Next**. This displays the **Sample Selection** grid containing a small number of tags selected for bulk edit.
8. Click on **Update**. The **Bulk Edit Confirmation** window opens with a review of the bulk edit details.
9. Click **OK** to proceed with the bulk edit. The screen refreshes and the **Tags** grid displays the edited tags.

Did You Know?

The **Bulk Edit** tool does not allow edits to tags with the **Source** of **Order**.

This means only initialized tags are available to bulk edit.

EXCEPTION:

Status Bulk Edits allow tags with any **Source** and will only move tags located in rooms.



Quick Transfer: Room to Room

Quick Transfer allows administrative administrators the ability to bulk transfer tags (in the status of Available) from multiple rooms at a site to a single destination room within the same site without scanning each tag.

1. Click on **Tags**, located on the top navigation bar.
2. Filter the **Tags** grid for the desired tags to transfer
3. Click on **Quick Transfer**.
4. Select **Room to Room** using the **Transfer Type** drop down menu.
5. Click on **Create a New Transfer**.
6. Select the desired site from the **Site** drop down menu.
7. Select the desired room(s) where the tags are currently located using the **Transfer from Room(s)** drop down menu.
8. Review the **Tag Details** box to verify the number of tags available to transfer. Only **Available** tags qualify for this process.
9. Select the desired room from the **Destination Room** drop down menu.
10. Select the desired tag status from the **Status** drop down menu.
11. Click **Go**.
12. Confirm the transfer details are accurate and type in the confirmation word (case sensitive).
13. Click on **Confirm**. A processing window appears and displays the progress of the transfer. The message “Room to Room Transfer Completed” appears.
14. Click **OK**.

WARNING:

This process cannot be undone.

All Asset Mgmt. users across the district will **lose access** to the application until processing is complete.

It is recommended to perform large quick transfers during times of low use of the application.

Tags associated with **Restricted Funding Sources** are not eligible for **Quick Transfers**.



Quick Transfer: Site to Site

Quick Transfer allows administrative administrators the ability to bulk transfer tags (in the status of Available) from multiple origin sites to a single destination without scanning each tag.

1. Click on **Tags**, located on the top navigation bar.
2. Filter the **Tags** grid for the desired tags to transfer.
3. Click on **Quick Transfer**.
4. Review the **Tag Details** box to verify the number of tags available to transfer. Only **Available** tags qualify for this process.
5. Select **Site to Site** using the **Transfer Type** drop down menu.
6. Click on **Create a New Transfer**.
7. Select the desired site(s) where the tags are currently located using the Transfer from Site(s) drop down menu (**Select All** and **Deselect All** can be utilized to affect this field).
8. Review the **Tag Details** box to verify the number of tags available to transfer. Only **Available** tags qualify for this process.
9. Select the desired site from the **Destination Site** drop down menu.
10. Select the desired room from the **Destination Room** drop down menu.
11. Click **Go**. The **Site to Site Transfer Confirmation** window opens.

WARNING:

This process cannot be undone.

All Asset Mgmt. users across the district will **lose access** to the application until processing is complete.

It is recommended to perform large quick transfers during times of low use of the application.

Tags associated with **Restricted Funding Sources** are not eligible for **Quick Transfers**.

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12. Click on **Confirm**. A processing window appears and displays the progress of the transfer.
13. The **Transfer Complete** window opens and the message “Transfer Successful! Your Transfer Number is:” appears.
14. To view/print the **Transfer Ticket**, click on  **Print Transfer Ticket**. The respective transfer ticket is displayed and, using the PDF reader’s controls, print out the transfer ticket.
15. Click  to close the **Transfer Ticket** window.
16. Click **OK** to close the **Transfer Complete** window.

Did You Know?

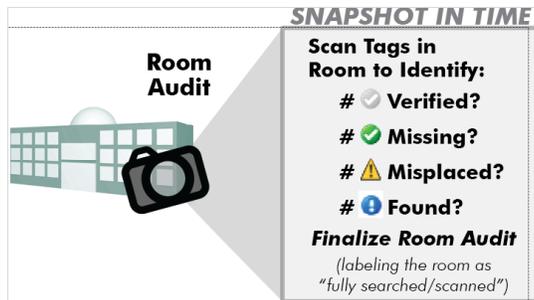
If the district level **Restricted Site Access** to a site audit, thus removing the ability to **Finalize** a room audit, the restriction does NOT restrict the site administrator from **Approving** the site audit.

Approving a site audit will move all room audits within the respective site audit to **Finalized**.



Audits Introduction

An Audit allows a site to scan all tags in a room and quickly identify missing items, misplaced items, and where those misplaced items should be located.



The **Site Audit** feature allows the administrative level to create room audits on a specific site, finalize the audits, review, and reconcile the various tag audit states.

Things to keep in mind:

- **Initiating Site Audits** - Audits can encompass all tags within a site or a specific set of tags filtered by Product Type, Room Type, and Last Scan Dates.
- **View Site Audits** - Only district level created site audits are displayed.
- **Reconcile Audits** - The administrative level uses the reconciliation process to take action on tag audit states in bulk. Additionally, all room audits are displayed. This includes district level created audit and site level created audit results. Once all of a finalized audit's tags have been reconciled, the room audit's status will change to the Closed status.

Did You Know?

The Asset Mgmt. audit process enables sites to identify, track, and update where the items they are responsible for are located at that specific moment in time.

This process satisfies the district's annual requirement of accounting for all site items and enables the site to perform spot audits at will.

Initiate Site Audit

A **Site Audit** allows the district level to provide sites with identified tags and/or rooms to audit. This gives sites ready-made rooms audits for staff to scan tags into.

NOTE: Districts can create site audits for any tags currently not found on another non-reconciled audit.

1. Click on **Initiate Site Audit**, located on **Quick Links** under **Tools**.
2. Select the desired site(s) in the **Site** drop down menu.
3. Select the desired product type(s) in the **Product Type(s)** drop down menu.
4. Select the desired room type(s) in the **Room Type(s)** drop down menu.
5. To ignore tags modified after a specific date, select the desired date using the calendar tool in the **Ignore Tags Modified After** field.
6. To restrict site level individuals from altering the audit without affecting their ability to record tag information, select **Restrict Site Access**.
7. Click  **Go**.
8. After the site audit is created, the **Initiate Site Audit** window closes and displays the **View Site Audits** grid. This grid is sorted by **Created Date**, displaying the most recently created audit at the top.

Did You Know?

The **Ignore Tags Modified After** field is looking at each tag's **Last Scan Date** respective to the filters set.

This is the date the tag was last issued and/or a change of status was made in Asset Mgmt..

Restricting Site

Access prevents site level individuals from changing aspects of district level created audits. Including:

- **Finalizing** the audit
- **Deleting** the audit
- **Removing products** from the audit (and subsequent tags)



Finalize Site Audit

The site has the ability to edit a room audit and all of the respective tags within the room audit while it is in the status of **New** or **In Progress**.

Audits must be in the status of **Finalized** before reconciling tag audit states. The district can move all room audits for a district created audit (by site) to the status of **Finalized**.

NOTE: Site Administrators can mark a district created site audit  **Approved** (seen under the **Progress** column). Doing this moves all room audits within the respective site audit to **Finalized** and removes the ability of any future edits to any respective room audit.

1. Click on  **Audits**, located on the top navigation bar. The **Audits** menu displays.
2. Click on **View Site Audits** in the **Audits** menu.
3. Search for the desired administrative level created site audit using the filters.
4. Click on  **Finalize Audits**, located on the respective site audit's row under the **Actions** column.
5. The **Finalize Audits Confirmation** window opens. If you wish to **Finalize Audits** for the respective site, click **OK**.
6. All audit counts for the respective site will now be listed under the **Finalized** column on the **View Site Audits** grid.

Did You Know?

If the district level **Restricted Site Access** to a site audit, thus removing the ability to **Finalize** a room audit, the restriction does NOT restrict the site administrator from **Approving** the site audit.

Approving a site audit will move all room audits within the respective site audit to **Finalized**.



Reconcile Tag Audit States in Bulk

The administrative level has the ability to reconcile tag audit states of **Misplaced** or **Missing** located in **Finalized** audits. Additionally, room audits created by the administrative level or site level are displayed.

NOTE: **Asset Types** of **Parent** and **Component** are not eligible for bulk reconciling.

1. Mouse over  **Audits**, located on the top navigation bar, and click on **Reconcile Audits** on the **Audits** menu.
2. Filter for the desired tags using the **Reconcile Audits Filters**.
3. Click  **Go**. The respective tags are displayed in the **Reconcile Audits Grid** and the **Reconcile Audits Filters** collapse.
4. To reconcile all **Misplaced** or **Missing** tags displayed in the grid, click  **Reconcile** located above the blue grid header bar. The **Reconcile Inventory** window opens.
5. Select the desired action in the **Action** drop down menu.
6. Add notes regarding this reconciliation in the **Audit Notes** field.
7. Click  **Go**. The **Reconcile Inventory Confirmation** window appears with a tag count respective to the Reconcile Audit Filters set.
8. Click **OK** to reconcile. A success statement window will appear.
9. Click **OK** to close the success statement window.
10. Click on  to close the **Reconcile Inventory** window.

Best Practice:

Review any site created  **Audit Notes** (located in the **Actions** column) associated with tags prior to reconciling.

These notes are intended to provide the district with additional information regarding the specific tag's audit state.



Reconcile an Individual Tag Audit State

The administrative level has the ability to reconcile tag audit states which are in **Finalized** audits. Additionally, room audits created by the administrative level or site level are displayed.

1. Click on  **Audits**, located on the top navigation bar. The **Audits** menu displays.
2. Click on **Reconcile Audits** in the **Audits** menu.
3. Select a previously created audit under **Audit Name** or filter for the desired audited tags using the **Reconcile Audits Filters**.
4. Click  **Go**. The respective tags are displayed in the **Reconcile Audits Grid** and the **Reconcile Audits Filters** collapse.
5. To reconcile an individual tag displayed in the grid, click the **Select Action** drop down menu located on the tag's row under the **Actions** column and choose the desired action.

The **Status Notes** window appears.

6. Enter notes regarding this reconciliation in the **Status Notes** field.
7. Click  **Save Notes**. The **Status Notes** window closes and the **Reconcile Audits** grid refreshes, displaying the newly reconciled tag's details.

Did You Know?

There are two kinds of audit notes available for tags in the **Reconcile Audits** page.

- **Site View Note:** site entered information intended to communicate with the district regarding the respective tags (only in **Finalized** room audits)
- **District View Reconcile Note:** district entered information when reconciling Missing or Misplaced tags. They are displayed on the tag's **Status History** tab in the **Tag/Serial Search** window

Apply Grid Filter(s)

Asset Mgmt. allows a user to filter data on many pages/areas. Most Asset Mgmt. grids have filters below the blue grid headers. You may type in and/or select from available drop down menus to activate a search using the filter(s) provided.

The following example uses the **Catalog** grid.

1. Review the blue grid headers and decide how you would like to filter for the desired data.

Note: In this example, we are searching for a 230 watt Sharp LCD projector. Product type LCD Projector. Product Type LCD Projector, Manufacturer-Sharp, Model-PO-F212 and Other-1

2. Under the header you wish to filter by, enter the respective data and select the enter key on your keyboard.

We filtered by Product Type of “LCD projector” and narrowed the information to nine possible LCD projectors. We can easily see the Sharp model and click on the respective row to review the product.

Product Number	Product Name	Manufacturer	Model	Product Type	Other #1
				LCD projector	
> 1035	1510X Long Throw Projector	Dell Computers	1510X	LCD projector	
> 1076	DC80A XGA Portable Digital Presenter	Lumens	DC80A	LCD projector	
> 1062	Hitachi CP X301	Hitachi	CP X301	LCD projector	230 Watt
> 1063	Hitachi CP-X201	Hitachi	CP-X201	LCD projector	190 Watt
> 1064	Hitachi CP-X251 3LCD Projector	Hitachi	CP-X251	LCD projector	
> 1083	NEC NP300	NEC	NP300	LCD projector	202 Watt
> 1084	NEC NP400	NEC	NP400	LCD projector	230 Watt
> 1095	Sharp PG-F212X	Sharp	PG-F212X	LCD projector	230 Watt

3. Continue to populate multiple filters to find the respective data.

We filtered by Product Type of “LCD projector” and Other #1 of “230 watt” and narrowed the information to three possible projectors. We can easily see the Sharp model and click on the respective row to review the product.

Product Number	Product Name	Manufacturer	Model	Product Type	Other #1
				LCD projector	230 watt
> 1062	Hitachi CP X301	Hitachi	CP X301	LCD projector	230 Watt
> 1084	NEC NP400	NEC	NP400	LCD projector	230 Watt

Did You Know?

Filtering is the process by which a user separates desired data from the entire data presented on the respective page/area by using a filter or multiple filters.

This process does not remove data from the application. It merely makes the desired data easier to find/view.



View Switch

View Switch provides access to other sites within the district (based on user settings).

1. Click on the **Switch to Site** drop down menu, located on the upper left hand corner of **Quick Links**.



2. Scroll through the list of available sites.
3. Click on the desired site. The screen refreshes and displays the respective site's Asset Mgmt. view.
4. To return to the user's primary view, click on the **Switch to Site** drop down menu and choose the first site listed.

Unlock a Field

The locking of data within Asset Mgmt. data fields prevents information from changing.

1. Locate the field you wish to change.
2. Click on  **Locked**, located next to the field. This will unlock the field and the icon will change to  **Unlocked**.
3. Enter the new data into the field. The field will become locked again.

Did You Know?

A Asset Mgmt. site user can be assigned to multiple sites.

Within the Assigned Sites field, the first site listed is the site user's primary site.

The site user will view switch to any additional assigned sites.

Districts with the Departments feature enabled will be asked to assign each user to a specific department or departments.

Edit a Tag's Details

An Administrator role login allows editing from the administrative view. A User role login must be logged into the site on which the tag is located to be able to edit the tag's information.

1. Click within the **Tag/Serial Search** field, located on the top navigation bar.

2. Enter the desired tag number (it can be made up of alpha and/or numeric characters).
3. Click on  **Search** or select the **Enter** key on your keyboard.
4. The **Tag Information** window will appear and display the details of the tag.
5. Click on  **Edit**.
6. Edit the Tag Number field, Serial Number, Tag Notes, and any additional custom fields (required fields are red).
7. To cancel, click on  **Cancel Changes**.
8. To save the changes, click on  **Update**.
9. Click on  to close the **Tag Information** window.

Did You Know?

Within the **Tag Information** window, you may have an icon to the right of the **Location** field.

This icon is clickable and will take you to the respective location displayed (Staff, Students, or Rooms).

This icon will only appear if the tag you searched for is located on a site.

The **Product** field, under **Product Information**, also has a clickable icon to the right of it and it will take you to the **Catalog** page for this respective product.

This icon is always available.



Edit a Tag's Assigned Product

Editing a tag's assigned product number is only available to tags with an **Source** of **Initial**. Administrative level users and site administrators are allowed to edit a tag's assigned product number. They must first be logged into the site where the tag is located.

1. Click within the **Tag Search** field, located on the top navigation bar.



2. Enter the desired tag number (it can be made up of alpha and/or numeric characters).
3. Click on  **Search** or select the **Enter** key on your keyboard.
4. The **Tag Information** window will appear and display the details of the tag.
5. Click on  **Edit Product Number** (located in the **Product Information** section).
6. Search for the desired product.
7. Click on **Select**, located on the desired product's row. This updates the window with the **Selected Product's** information.
8. Review and verify the **Current Product** and **Selected Product** information are correct.
9. To save the changes, click on  **Update**.
10. Click on  to close the **Tag Information** window.

Warning:

This will not change the associated information located in the **Funding Information** section.

To edit **Purchase Price, Purchase Date** or **Funding Source** data for tags with an **Source** of **Initial**, review **Bulk Edit** (only accessible to administrative level administrators).

Assign a Tag to Another Tag

Only tags in the status of **Available** are eligible to be assigned to a parent. When a component is assigned to a parent, it automatically moves to the parent's current location.

This action is recorded in the tag's **Status History**.

1. Search for the current **Parent** tag in the **Tag/Serial Search** field. The **Tag Information** window opens and displays the tag's details.
2. Click on **Components** tab.
3. Enter the intended **Component** tag into the **Component Tag** field. (If a scanner is not being utilized, click on ) The tag is displayed in the **Components** grid.
4. Click on  to close the **Tag Information** window.

Did You Know?

As components are assigned to existing tags, the **Asset Type** of the tags are changed respectively. There are three Asset Types:

- **Standalone** - a tag not assigned to another tag and has no tags assigned to it
- **Parent** - a tag with one or more tags assigned to it
- **Component** - a tag assigned to another tag (a component can only be assigned to one parent)

A tag can only be assigned one **Asset Type** at a time. Therefore, a component cannot also be a parent.



Transfer a Component to Another Tag/Parent

When a component is assigned to a parent, it automatically moves to the parent's current location. This action is recorded in the tag's Status History.

A tag can only be assigned one **Asset Type** at a time. Therefore, a component cannot also be a parent.

1. Search for the current **Parent** tag in the **Tag/Serial Search** field. The **Tag Information** window opens and displays the tag's details.
2. Click on **Components** tab.
3. Locate the desired tag (to transfer from this parent) in the **Components** grid.
4. Click on **Transfer Component**, located on the same row. The **Transfer Component** window opens.
5. Enter the tag number of the new parent in the **New Parent Tag** field. (If a scanner is not being utilized, click on ) The new parent's product name and current location are displayed.
6. To complete the transfer, click **Go**. A success statement is displayed.
7. Click **OK**. The screen refreshes and the tag is no longer listed as a component of the parent displayed.

Did You Know?

If all of the components assigned to a parent need to be transferred to another parent, use the **Transfer All Components** feature.

It is located above the blue grid header bar of the **Components** grid.

BEST PRACTICE:

Verify the desired components being physically transferred are digitally displayed in the **Components** grid.

Remove Component from Parent

Removing a component/parent relationship from a tag does not remove the tag from Asset Mgmt.. This changes the **Asset Type** from **Component** to **Standalone**.

1. Search for the **Parent** tag in the **Tag/Serial Search** field. The **Tag Information** window opens and displays the tag's details.
2. Click on **Components** tab.
3. Locate the desired tag to remove from the parent in the **Components** grid.
4. Click on **Remove as Component**, located on the respective tag's row. The screen refreshes and the tag is no longer listed as a component of the parent.

Remove Parent from Component

Removing a component/parent relationship from a tag does not remove the tag from Asset Mgmt.. This changes the **Asset Type** from **Component** to **Standalone**.

1. Search for the **Component** tag in the **Tag/Serial Search** field. The **Tag Information** window opens and displays the tag's details.
2. Click on **Components** tab.
3. Locate the desired tag to remove from the parent in the **Components** grid.
4. Click on **Remove as Component**, located at the bottom left-hand corner. The screen refreshes.

Did You Know?

As parent tags and their respective component tags move around the district, additional warning screens are displayed before completing the desired action.

- **Moving a parent** - a list of the respective component(s) are displayed and allows the removal of one or more components from the assigned parent.
- **Moving a component** - the parent's information is displayed and warns the component tag will be unassigned from the parent tag.



Components Listing Report

This report provides a listing of all current component tags and parent tags within the district. This report does not require the filtering of the Tags grid.

The report includes Parent Tag, Asset Type, Tag, Serial, Product Number, Product Name, Manufacturer, Model, Product Type, Other 1, 2, & 3, Suggested Price, Site ID, Location ID, Location Description, Location Type, Status, Destination, Asset UID, Custom Field data, Tag Notes, RFID, Source, Order Number, Vendor, Funding Source, Account Code, Purchase Price, Projected Life, Expiration Date, Last Scan Date, Last Scan By, fields, SKU, Area, Last Audit Date and Last Audit By.

The **Components Listing** is available in CSV format.

1. Click on  **Tags**, on the top navigation bar.
2. Click on **Tags' Report Drop Down Menu**, located above the **Tags'** blue grid header.
3. Select **Components Listing** under the **--- Excel ---** menu subcategory.
4. When the message appears asking "Do you want to open or save ComponentsListing.csv ...", click on **Open**.
5. The **Components Listing** file will open within a spreadsheet program (like Microsoft Excel). You may choose to search, filter, sort, delete, save, and/or close the file using spreadsheet program's controls.

Attach a File to a Tag

Each file attachment cannot exceed 1MB.

1. Click within the **Tag/Serial Search** field, located on the top navigation bar.

2. Enter the desired tag number (it can be made up of alpha and/or numeric characters).
3. Click on  **Search** or select the **Enter** key on your keyboard.
4. The **Tag Information** window will appear and display the details of the tag.
5. Click on the **Attachments** tab.
6. Click on  **Add Attachment**. The **Add Attachment** window opens.
7. Click **Browse** to search for and select the desired file.
8. Enter any desired notes into the **Notes** field.
9. Click on  **Save**. This closes the **Add Attachment** window and refreshes the **Attachments** tab.
10. Click on  to close the **Tag Information** window.

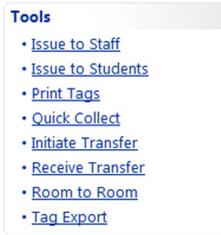
Did You Know?

The number of attachments are displayed on the **Attachment** tab within parentheses.



Room to Room Transfer

1. **View Switch** to the desired site.
2. Click on **Room to Room** under Quick Links **Tools**.



3. In the **Transfer to Room** field enter the **room number** to which the item will be moved. If you manually enter the number, click on **Next** to proceed to the next field **OR** click on **Search** to find and select the Room Number.
4. Using the **Status** field's drop down menu, select the **Status** of the item being moved.
 - Available** - assigns item to the room for the purpose of later issuing it to an individual or another room.
 - In Use** - assigns item to the room with a status of 'in use', making it unavailable to issue to a staff member or a student.
5. Scan/enter the **Tag Number** into the **Tag** field. If you manually enter the number, click on **Save** to add this item to the room.
6. If accessories were issued to this tag, they will be displayed to remind you to transfer them with the item being moved from its current room. Select **Transfer Selected** to transfer the listed accessories.
7. Select **Done** to exit the **Room to Room** window.

Did You Know?

Unless changed, the **Status** field will retain the original settings from step 4.

If multiple tags are to be moved to the same room, select the **Lock** icon.

This allows you to scan all of the tag numbers without entering the room number for each tag.

Transfer History

Asset Mgmt. allows items to be moved from one site to another site through **Site to Site Transfers** (site only process) and **Quick Site to Site Transfers** (administrative only process).

The **Transfer History** window allows an administrator to search for, view, and/or print **Transfer Tickets** for all site to site transfers (in any status) throughout the district.

1. Click on **Transfer History**, located in the Quick Links **Tools** menu.
2. Filter for the desired site to site transfer.
3. Click on  **Print Ticket** located on the site to site transfer's row. This opens the **Transfer Print Ticket Report** window.
4. Use the PDF reader's controls to view, save, and/or print the respective transfer ticket.
5. Click on  to close the **Transfer Print Ticket Report** window.
6. Click on  to close the **Transfer History** window.



*Selecting **Transfer History Report** from the **Please Select Transfer Report** drop-down menu opens a spreadsheet that lists all transfer data history for a particular filter.

Did You Know?

If a transfer ticket is in the status of **New**, the listed items on the transfer ticket may change prior to being placed **In Transit**.



Archive Inventory

The **Archive Inventory** feature allows inventory to be removed from active inventory counts. Tags with a status of **Auctioned, Disposed, Lost, Recycled, Returned to Vendor, Sold, Stolen, Surplus, and Used for Parts** qualify for the archiving process. Three sets of information are required to be identified to archive tags. They are: **Tag Status, Prior to Date, and Site.**

1. Click on **Archive Inventory**, located on the **Quick Links Tools** menu. The **Archive Inventory** window opens.
2. Select the desired tag **Status(es)** from the **Status** drop down field.
3. Select the desired **Prior to Date** from the calendar tool.
4. Select the desired **Site(s)** from the **Site** drop down field.
5. Enter any notes regarding the selected tags.
6. Click on  **Go**. The **Confirm Archive** window opens with the number of tags selected to be archived.
7. Review the tags selected to be archived. Click on  **Tag(s) Selected for Archive** to open a CSV report.

When the message appears asking “Do you want to open or save **TagsSelectedForArchive.csv** ...”, click on **Open**. The **Tag(s) Selected for Archive** report will open within a spreadsheet program.

8. Confirm the number of tags selected to archive by typing the tag count into the **Confirm the count by typing it here** field.
9. Click **OK**.
10. Click on  to close the **Archive Inventory** window.

Did You Know?

This feature is accessible in the **Administrative** view and requires **Administrator** credentials.

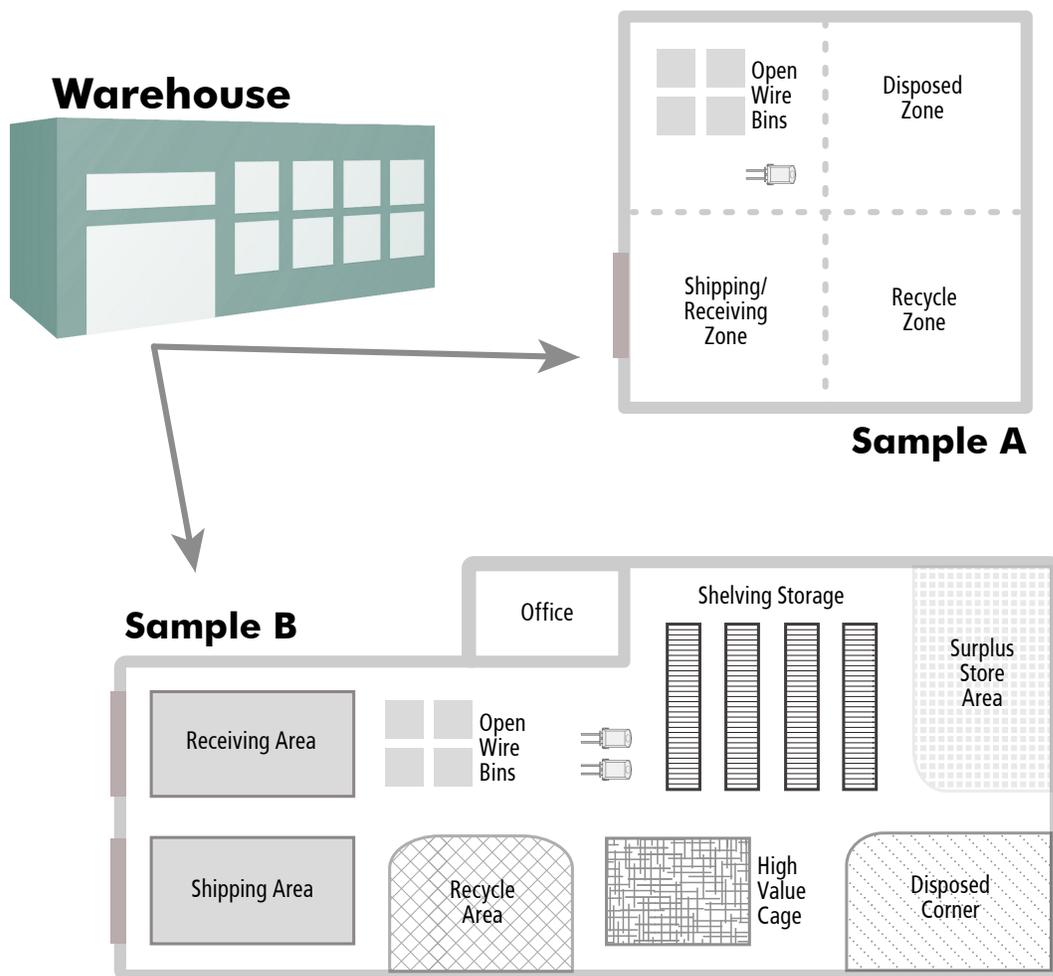
After tags have been archived, they can be viewed in the **Archived Inventory Report** and/or within **Tag Search** (Tag details will display archive information in red).

WAREHOUSES

Warehouse Overview

Warehouses are special kinds of sites. They are centralized locations allowing the tracking and storage of tagged and untagged inventory. They contain **Rooms**, **Containers**, and **Staff**.

Depending on the district, a warehouse could be a small portable building or a large facility capable of housing a significant quantity of goods and assets. In addition, a district could have multiple warehouses of varying sizes. Such as:





WAREHOUSES

Warehouse vs. “Normal” Site

A **Warehouse** is a site with added functionality.
A warehouse is different than a “normal” site by:



Warehouse



“Normal” Site

WAREHOUSES	“NORMAL” SITES
Track Tagged & Untagged Items	Track Only Tagged Items
Report on Tagged & Untagged Items	Report Only on Tagged Items
Manage Inventory in Locations: Rooms, Staff, Containers , & Transfers	Manage Inventory in Locations: Rooms, Staff, Students , & Transfers
Transfers to and from a Warehouse Require Assigned Drivers & Delivery Dates	Transfers to other “Normal” Sites do NOT Require Assigned Drivers or Delivery Dates
Inventory Grid (with Inventory Export)	Tags Grid (with Tags Export)
Transfer Containers Full of Items to “Normal” Sites	Receive Items out of Containers Shipped to the Site



Catalog Introduction

The **Catalog** page allows an administrator to view each district level tracked product. The administrative level adds the products to the Catalog database and identifies the required information to be tracked with each product.

Product Number	Product Name	Manufacturer	Model	Product Type	Other #1	Price
1005	10-unit Notebook Storage Cart	Anthro	NCC10	Cart		1699.00
1035	1510X Long Throw Projector	Dell Computers	1510X	LCD projector		890.14
1000	17 inch V173-DJb LCD Monitor	Acer	V173-DJb	Monitor	17"	134.95
1054	19 LE1909wm Wide LCD Monitor	Hewlett-Packard	LE1909wm	Monitor	19"	174.97
1004	20-Unit Laptop Storage Cart	Anthro	LTSC00WH/SM	Cart		1899.00
1090	21.5 Secondary Notebook LCD Display	Samsung		Monitor	21.5"	249.95
1006	22 inch E2237FWH Widescreen LCD Monitor	AOC	E2237FWH	Monitor	22"	232.95
1003	30-Unit Laptop Storage Cart	Anthro	LTSC30WH/SM	Cart		1999.00
1022	300AF plus	AverMedia	300AF	Document Camera		699.00
1098	6-position spirit SD Listening Center	Spirit		Listening Center		269.95

Site ID	Site Name	Site Type	Total Inventory	In Use	Available																				
044	Reagan Middle School	Campus - Middle School	20	12	8																				
<table border="1"> <thead> <tr> <th>Location Type</th> <th>Total Inventory</th> <th>In Use</th> <th>Available</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Room</td> <td>10</td> <td>2</td> <td>8</td> <td></td> </tr> <tr> <td>Staff</td> <td>10</td> <td>10</td> <td>0</td> <td></td> </tr> <tr> <td colspan="2">Total: 20</td> <td colspan="2">Total: 12</td> <td>Total: 8</td> </tr> </tbody> </table>						Location Type	Total Inventory	In Use	Available	Actions	Room	10	2	8		Staff	10	10	0		Total: 20		Total: 12		Total: 8
Location Type	Total Inventory	In Use	Available	Actions																					
Room	10	2	8																						
Staff	10	10	0																						
Total: 20		Total: 12		Total: 8																					
002	Charles Bailey High School	Campus - High School	10	0	10																				
001	Learning Campus	Campus - High School	20	1	19																				
			Total: 50	Total: 13	Total: 37																				

The **Catalog** grid allows you to search for district tracked active products (default) and inactive products (if “Show Inactive” is selected).

Did You Know?

Each product’s information and any accessory associated with a product (as entered by the administrative level) is available to review.

There is also a breakdown of the product’s inventory count for your district by site.



Catalog Overview

Add a Record  - adds a product to Asset Mgmt.

Show Inactive - when checked, allows the administrative level to search for and view any product marked as inactive

Search Fields - located at the top of the Catalog grid, allows a user to search for a specific product using the Product Number, Product Name, Manufacturer, Model, Product Type, Other #1, and/or Price search fields

Edit  - located on each product's row, is the process by which the administrative level may add/edit the respective product's details

Duplicate  - located on each product's row, is the process by which the administrative level may duplicate an existing product's details for time saving measures

Product Details Tab

The **Details Tab** displays each product's information as entered by the administrative level.



- **Product Number** - an auto generated field, however, the administrative level has the option to enter their own product number
- **Product Name** - name of the product

Continued on next page 



- **Manufacturer** - company which produces the product
- **Model** - manufacturer's specific version of the product
- **Product Type** - description of the different types or groups of products (such as laptop, calculator, printer, cell phone, etc...)
- **Area** - an area to which a product is associated (such as science, math, technology, etc...)
- **SKU** - defined by a retailer's coding system to distinguish individual products within the respective retailer's point-of-sale system
- **Notes** - displays any administrative level created notes
- **Projected Life** - number of years the administrative level deems this item to be usable
- **Other #1, Other #2, Other #3** - optional fields used to track miscellaneous information regarding the product
- **Suggested Price** - suggested replacement price for the product
- **Serial Required** - true or false setting requiring a serial number to be recorded when a tag is initially issued for this product
- **Allow Untagged** - true or false setting enabling the product to transfer using inventory counts (as they do not have unique identifiers on each item) and, if the warehouse feature is enabled, to track and report on those quantities
- **Image of Product** - picture associated with the product and displayed on numerous screens and various reports
- **Total Inventory** - quantity of the product (district wide)
- **Total Available** - quantity of the product which are tagged and currently in the status of "Available" district wide (versus the status of "In Use")
- **Total Value** - calculated by the Total Inventory count multiplied by the Suggested Price

Continued on next page 



Product Inventory Tab

The **Inventory Tab** displays the product's Total Inventory count, the total In Use, and the total Available respective to the site(s) to which the product has been issued.

Site ID	Site Name	Site Type	Total Inventory	In Use	Available
044	Reagan Middle School	Campus - Middle School	20	12	8
Location Type			Total Inventory	In Use	Available
Room			10	2	8
Staff			10	10	0
Total: 20			Total: 12	Total: 8	
002	Charles Bailey High School	Campus - High School	10	0	10
001	Learning Campus	Campus - High School	20	1	19
Total: 50			Total: 13	Total: 37	

- **Site ID** - an alpha and/or numeric identification number as assigned by the student management system, imported into the Asset Mgmt. data, and/or as entered by the district administrator
- **Site Name** - name of the site
- **Site Type** - general categories used to identify different kinds of sites (such as: Elementary Campus, Print Services, Administration, etc...)
- **Total Inventory** - quantity of the product as assigned to this site by the district administrator
- **In Use** - quantity of the product tagged and currently in the status of "In Use"
- **Available** - quantity of the product tagged and currently in the status of "Available"
- **Site Level Information:**
 - **Location Type** - includes Rooms, Staff, and Students
 - **Actions Column:**
 - **Detail Inventory** - a detailed view of inventory counts by specific location

Did You Know?

On the **Inventory** tab, clicking on the site expands the grid to display where the product is located within that site.

It displays pertinent location type(s) (Room, Staff, and/or Student) which are issued at the site level and the respective type's inventory total.

The "Actions" icon for each location type displays the specific rooms, staff members, and/or students to whom the item has been issued.

Continued on next page



Product Accessories Tab

The **Accessories Tab** displays each accessory associated with the product. Accessories may be issued with a tagged item. The accessory is not tagged.

The screenshot shows a software interface with a yellow header bar containing product information: '1022 300AF plus AverMedia 300AF Document Camera 699.00'. Below the header are tabs for 'Details', 'Inventory', and 'Accessories'. The 'Accessories' tab is active, displaying a table titled 'Assigned Accessories'. The table has columns for Name, Description, Price, Consumable, Units, and Actions. Two accessories are listed: 'Replacement Remote' with description '#COMMPREM1', price 19.99, and 'Soft Carrying Case' with description '#VisionPCC', price 69.99. Both are marked as non-consumable and have 1 unit.

Name	Description	Price	Consumable	Units	Actions
Replacement Remote	#COMMPREM1	19.99	No	1	
Soft Carrying Case	#VisionPCC	69.99	No	1	

- **Assign Accessories** - assigns optional items which may be issued along with the product
- **Edit** - is located on each accessory's row and is the process a district administrator uses to add/edit/alter the respective accessory's details
- **Name** - name of the accessory
- **Description** - description of the accessory as entered by the district administrator
- **Price** - replacement price of the accessory
- **Consumable** - no or yes designation of the district administrator to establish what is not expected to be returned when the tag/item is collected
- **Units** - number of units to be issued when the associated product is issued to room, staff member, or student
- **Actions Column:**
 - **Remove** - a process which removes the accessory from the respective product



Catalog Reports

There are five product related reports which can be viewed/printed from the **Catalog** page.

Catalog Report Drop Down menu:

- **Product Catalog Report** - complete listing, in PDF format, of products within Asset Mgmt. and has detailed information regarding each product (including product number barcodes)
 - Additional on screen filters are located at the top of the screen
- **Product Listing** - provides, in XLS format, a listing of all district tracked products and the details of those items
- **Inventory Aging By Product Type** - provides, in XLS format, a listing of Product Type, Location Type, Quantity, and Age (which is calculated by the purchase date of the item) for the entire district
- **Inventory Quantity By Product Type** - provides, in CSV format, a listing of Product Type, Site Name, and Quantity for the entire district
- **Inventory Value By Product Type** - provides, in XLS format, the total quantity and value of inventory by product type, by site
- **Missing Inventory Value By Product Type** - provides, in XLS format, the total missing quantity and missing value of inventory by product type, by site
- **Site Inventory Aging By Product** - provides, in XLS format, Product Type, Site Name, Location Type, Quantity, and Age (calculated by the purchase date of the item) for the respective site

Did You Know?

If you filter the **Catalog** grid before selecting a catalog report, the report will display only the filtered information.

Once the PDF preview of the **Product Catalog Report**, the on screen filters allow additional filters to be applied.

Example:

Produce a **Product Catalog** for only **Untagged** enabled products.



Purchasing Introduction

The **Purchasing** page allows the administrative level to create purchase orders, import purchase data, receive items, ship items to sites, and quickly assign items to sites in addition to recording essential purchasing data (purchase order number, purchase date, vendor, funding source, and quantity).

The screenshot shows the main Purchasing interface. At the top, there are navigation tabs for Home, Catalog, Purchasing, Sites, Tags, and Audits. A search bar is present for 'Tag / Serial' with a search icon. On the right, there are links for Help and Log Off. Below the navigation, there are buttons for 'Add Record', 'Import Inventory', and 'Show Closed'. A dropdown menu for 'Please Select Purchasing Report...' and a 'Refresh' button are also visible. The main area contains a table with the following columns: Order Number, Purchase Date, Vendor, Status, Est. Delivery Date, and Notes. The table lists several purchase orders, including PO32056, PO 998877, PO 889977, PO 778899, PO 667799, RM6002-1, RM53-1, RM704-1, RM32-1, and 5700342. The status for all listed orders is 'Open'. At the bottom of the table, there are navigation controls and a page size dropdown set to 10. The footer indicates '35 items in 4 pages'.

Order Number	Purchase Date	Vendor	Status	Est. Delivery Date	Notes
PO32056	03/04/2015	Digitek	Open	03/04/2015	
PO 998877	06/09/2014	All Things Digital	Open		
PO 889977	06/09/2014	CDW	Open		
PO 778899	06/09/2014	CDW	Open		
PO 667799	06/09/2014	All Things Digital	Open		
RM6002-1	03/04/2013	All Things Digital	Open	03/29/2013	
RM53-1	02/25/2013	All Things Digital	Open	03/11/2013	
RM704-1	02/18/2013	Fry's	Open	03/04/2013	
RM32-1	01/07/2013	Nextag	Open	01/31/2013	
5700342	12/18/2012	Digitek	Open	02/01/2013	

The screenshot shows the 'Purchase Inventory' details page for order RM6002-1. The page has a yellow header with the order ID, date (03/04/2013), vendor (All Things Digital), status (Open), and estimated delivery date (03/29/2013). Below the header, there are tabs for 'Details', 'Products', and 'Attachments'. The main content area is a table with columns: Product Number, Product Name, Funding Source, Account Code, Ordered, Received, Shipping, Tags Received, Status, and Actions. A single product is listed: 1060 HP Compaq Tablet PC Tc4400, District-Budgeted, 945, with 6 ordered, 6 received, 6 shipping, and 1 tag received. The status is 'Open'. Below the table, there are details for the purchase price (\$1,100.00), ordered and received quantities (6), and shipping and available quantities (6). A 'Shipped To Site' table shows the item is shipped to 'Learning Campus' with a quantity of 6 and 1 tag received. The status is 'Open'. At the bottom, there are navigation controls and a page size dropdown set to 5. The footer indicates '1 items in 1 pages'.

Product Number	Product Name	Funding Source	Account Code	Ordered	Received	Shipping	Tags Received	Status	Actions
1060	HP Compaq Tablet PC Tc4400	District-Budgeted	945	6	6	6	1	Open	

Shipped To Site	Shipping	Received Tags	Status	Actions
Learning Campus	6	1	Open	

A purchase order may contain multiple products.

Items can be assigned/shipped to multiple sites.



Purchasing Overview

Add Record  - allows a site administrator to add a purchase order to Asset Mgmt.

Search Fields - located at the top of the **Purchasing** grid, allows searching for a specific purchase order using the Order Number, Purchase Date, Vendor, Status, Estimated Delivery Date, and/or Notes search fields

Edit  - located on each purchase order's row, is the process by which the administrative level may add/edit the respective purchase order's details

Purchase Order Details

Selecting a purchase order allows a user to view details for the respective purchase order. The **Details** tab displays each purchase order's information as entered by the creator of the purchase order (site administrator or administrative level).



- **P.O. Number** - an alpha and/or numeric purchase order number
- **Vendor** - name of an individual or a company who provides/supplies products to your district (similar to a supplier)
- **Status** - state of the purchase order (open purchase orders have full functionality, closed purchase orders prohibit editing the purchase order details and adding additional products)
- **Purchase Date** - date the purchase is submitted to a vendor and it is also used to calculate the item's expiration date (may be the date the item's warranty goes into effect)

Continued on next page 



- **Estimated Delivery Date** - date the items on the purchase order are expected to be received from the vendor
- **Notes** - displays any notes entered by the creator of the purchase order and/or an administrative user

Purchase Order Products

Selecting a purchase order allows a user to view the products associated with the respective purchase order. The **Products** tab displays each purchase order's product information as assigned by the creator of the purchase order and/or an administrative user.

Product Number	Product Name	Funding Source	Account Code	Ordered	Received	Shipping	Tags Received	Status	Actions
LENOVON20P	Lenovo IdeaPad N20p Chromebook	Technology	810-22-5555-22	110	0	0	0	Open	
2000047	HAYES INFINITY MGH1990 Laptop	Technology	800810555321	15	15	15	15	Closed	

- **Product Number** - the number assigned to the product by the administrative level
- **Product Name** - name of the product
- **Funding Source** - origin of financial resources used to purchase items
- **Account Code** - an alpha and/or numeric code indicating a district specific financial tracking number
- **Ordered** - quantity of the product ordered from the vendor
- **Received** - quantity of the product received by the district from the vendor (site created purchase orders will automatically populate with the quantity ordered)
- **Shipping** - quantity of the product the administrative level has shipped to respective sites (site created purchase orders will automatically populate with the quantity ordered)

Did You Know?

Products with a Received quantity of zero are available to **Delete** from a purchase order.

The delete icon will be grayed out (inactive) if a **Received** quantity is higher than zero.

Continued on next page



- **Tags Received** - quantity of the product tagged and issued to a room on the respective sites
- **Status** - state of the product within the purchase order ('Open' products have items left to be tagged, 'Closed' products have all been tagged)
- **Actions** - functions allowing the administrative level to affect each product's processing within the respective purchase order
 - **Receive** - receives a quantity of the product delivered to the district from the vendor
 - **Ship to Site** - assigns available product quantities to sites and allows the administrator level to assign and issue tags to a respective site's room (Purchasing Tickets are located on this screen)
 - **Delete** - deletes any product assigned to the respective purchase order with no received items
- **Specific Product Information** (click on the product to display the respective product's **Details** tab):

Product Number	Product Name	Funding Source	Account Code	Ordered	Received	Shipping	Tags Received	Status	Actions
1060	HP Compaq Tablet PC Tc4400	District-Budgeted	945	6	6	6	1	Open	

Shipped To Site	Shipping	Received Tags	Status	Actions
Learning Campus	6	1	Open	

- **Purchase Price** - amount entered when adding the product to the respective purchase order (may be different than the product's suggested price)

Did You Know?

A **Purchasing Ticket** is a printable list, in PDF format, detailing the items to package, how many, and to which site to ship those items (also serves as a packing slip for the respective site staff).

Continued on next page



- **Received Quantity** - quantity of the product received by the district from the vendor (site created purchase orders will automatically populate with the quantity ordered)
- **Shipping Quantity** - quantity of the product the district has shipped to respective sites (site created purchase orders will automatically populate with the quantity ordered)
- **Available Quantity** - quantity of the product received by the district from the vendor and not yet shipped to a site
- **Shipped to Site** - located in the details grid, is a list of site names which have been shipped the respective product for this purchase order
- **Shipping** - located in the details grid, is the quantity of the product the district has shipped to respective sites
- **Received Tags** - located in the details grid, is the quantity of the product tagged and issued to a room on the respective sites
- **Status** - located in the details grid, is the state of the site's shipment ('In Transit' shipments have items left to be tagged, 'Closed' shipments have tagged all shipped items)



Sites Introduction

The **Sites** page allows an Administrative Administrator to create sites, view site details, and quickly review products for which each site is responsible.

The screenshot displays the 'Sites' page in the Asset Management system. The top navigation bar includes Home, Catalog, Purchasing, Sites, Tags, Audits, a search box, Help, and Log Off. The main content area shows a table of sites with columns for Site ID, Site Name, Contact, Phone, Site Type, Warehouse, and Region. A pop-up window shows the 'Inventory by Product' for site 001, listing products like '17 inch V173-DJb LCD Monitor' and 'Acer Aspire One AO532h-2588' with their respective inventory counts.

Site ID	Site Name	Contact	Phone	Site Type	Warehouse	Region
999	Administration - District			District	False	None
109	Bright Elementary			Campus - Elementary	False	East
111	Bush Elementary			Campus - Elementary	False	East
046	Carlson Middle School			Campus - High School	False	North
110	Carrington Elementary			Campus - Elementary	False	West
002	Charles Bailey High School	Jonathan Riley	512-219-8755	Campus - High School	False	North
113	Creekside Elementary			Campus - Elementary	False	North
041	Cypress Springs Middle School			Campus - Middle School	False	North
105	Dixon Elementary			Campus - Elementary	False	None
W003	East Warehouse	Connie James	512-555-5555	Warehouse	True	East

Product Number	Product Name	Total Inventory	In Use	Available
1000	17 inch V173-DJb LCD Monitor	60	60	0
1001	Acer Aspire One AO532h-2588	41	13	28
1003	30-Unit Laptop Storage Cart	10	0	10
1004	20-Unit Laptop Storage Cart	5	0	5
1005	10-unit Notebook Storage Cart	4	3	1

Sites are the locations to which you will issue and account for items within your district.

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Sites Overview

- **Add Record**  - add a site to Asset Mgmt.
- **Show Inactive** - when checked, allows a user to search for and view any site marked as inactive
- **Search Fields** - located at the top of the Site grid, allows a district administrative user to search for a specific site using the Site ID, Site Name, Contact, Phone, Site Type, Warehouse, and/or Region search fields
- **Edit**  - is located on each site's row and is the process by which an administrator may add/edit the respective site's details
- **Quick Links Tools** (only when Sites is selected):
 - Site Types - located under **Management** Quick Links, are general categories used to identify different kinds of sites within your district (Examples of Site Types include: Middle School Campus, Print Services, Administration, etc...)

Sites Details Tab

The **Details** tab displays each site's information as entered by the administrative level.



001 Learning Campus Sally Cartright 512-219-7999 Campus - High School None		
Site Details Inventory		
Site: Learning Campus		
Site ID: 001	Contact: Sally Cartright	Notes:
Site Name: Learning Campus	Phone: 512-219-7999	
Site Type: Campus - High School	Email: scartright@lisd.org	
Region: None	Warehouse: False	
Shipping Address		Billing Address
Address 1: 119111 Learning Avenue		Address 1:
Address 2:		Address 2:
City: Austin		City:
State: TX		State:
Zip: 78722		Zip:
Instructions:		Instructions:

- **Site ID** - an alpha and/or numeric site number which likely corresponds with the student management system's site ID numbers

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- **Site Name** - name the site/location goes by
- **Site Type** - description of the different types or groups of sites/locations (such as Elementary Campus, District, Warehouse, etc...)
- **Region** - description of the different physical locations of the sites (such as North, South, East of River, etc...)
- **Contact** - name of the person responsible for the respective site's instructional technology inventory (includes Phone, Email, and respective Notes)
- **Warehouse** - true/false field indicating site is a warehouse (warehouses allow tracking, shipping, and reporting of tagged and untagged inventory)
- **Shipping Address** - address used when shipping items to this site (includes Address 1, Address 2, City, State, Zip, and respective Instructions)
- **Billing Address** - address used when billing items to this site (includes Address 1, Address 2, City, State, Zip, and respective Instructions)

Sites Inventory Tab

The **Inventory Tab** displays the products and their respective inventory counts, including In Use and Available counts.

Product Number	Product Name	Total Inventory	In Use	Available																																				
> 1000	17 inch V173-D1b LCD Monitor	60	60	0																																				
▼ 1001	Acer Aspire One A0532h-2588	41	13	28																																				
<table border="1"> <thead> <tr> <th>Inventory Type</th> <th>Location Type</th> <th>Total Inventory</th> <th>In Use</th> <th>Available</th> <th>Auctioned</th> <th>Disposed</th> <th>Recycled</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Tagged</td> <td>Room</td> <td>39</td> <td>4</td> <td>28</td> <td>3</td> <td>4</td> <td>0</td> <td></td> </tr> <tr> <td>Tagged</td> <td>Transfer</td> <td>2</td> <td>2</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td></td> </tr> <tr> <td colspan="2">Total:</td> <td>41</td> <td>6</td> <td>28</td> <td>3</td> <td>4</td> <td>0</td> <td></td> </tr> </tbody> </table>		Inventory Type	Location Type	Total Inventory	In Use	Available	Auctioned	Disposed	Recycled	Actions	Tagged	Room	39	4	28	3	4	0		Tagged	Transfer	2	2	0	0	0	0		Total:		41	6	28	3	4	0		Total: 6 Total: 28 Total: 3 Total: 4 Total: 0		
Inventory Type	Location Type	Total Inventory	In Use	Available	Auctioned	Disposed	Recycled	Actions																																
Tagged	Room	39	4	28	3	4	0																																	
Tagged	Transfer	2	2	0	0	0	0																																	
Total:		41	6	28	3	4	0																																	
> 1003	30-Unit Laptop Storage Cart	10	0	10																																				
> 1004	20-Unit Laptop Storage Cart	5	0	5																																				
> 1005	10-unit Notebook Storage Cart	4	3	1																																				

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- **Product Number** - the number assigned to the product by the district administrator
- **Product Name** - name of the product
- **Total Inventory** - quantity of the product assigned to the site by the administrative level
- **In Use** - quantity of the product tagged and currently in the status of “In Use” respective to site
- **Available** - quantity of the product tagged and currently in the status of “Available” respective to site
- **Auctioned** - quantity of the product tagged and currently in the status of “Auctioned” respective to site
- **Disposed** - quantity of the product tagged and currently in the status of “Disposed” respective to site
- **Recycled** - quantity of the product tagged and currently in the status of “Recycled” respective to site
- **Specific Product Information:**
 - **Location Type** - includes Rooms, Staff, Students, and Transfers
 - **In Use** - quantity of the product tagged and currently in the status of “In Use” by location type
 - **Available** - quantity of the product tagged and currently in the status of “Available” by location type
 - **Actions Column:**
 - **Detail Inventory**  - a detailed view of inventory counts by specific location

Did You Know?

Clicking on the product will display the location type (Room, Staff, Student, and/or Transfer) the item is associated to and the respective inventory total.

The action icon for each location type will display the specific rooms, staff members, and/or students to which the item has been associated.

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Sites Reports

The **Sites** page provides five reports in two areas to be viewed/printed.

- **Sites Report Drop Down** menu:
 - **View Distribution Status Report** - provides, in PDF format, inventory detail across all sites. As long as the count of the sites is above, the count will populate in the report.
 - **View Distribution Inventory Report** - provides, in PDF format, administrative users a detailed list of tag data across all sites
 - **View Fixed Assets Report** - provides, in PDF format, administrative users a detailed list of fixed assets from purchase orders across all sites
 - **View Sites Report** - provides, in XLS format, provides site's Site ID, Site Name, Contact, Phone, Site Type, Warehouse indicator and Region
 - **View Student Charge Activity Listing** - provides, in CSV format, a listing of the students, their respective charges (satisfied or unsatisfied), and all charge payments (payment, void, or refund) respective to a site



Tags Introduction

Tags allows the administrative level to search, view, print, and/or bulk edit tags within Asset Mgmt..

Tag	Serial	Product Number	Product Name	Manufacturer	Product Type	Location	Asset Type	Status	Vendor	Funding Source	Source
T1226		2000207	Cisco 2500 Watt Power Supply	Cisco	Power Supply	Room: Serv 100	Standalone	Available	Cisco	Erate	Order
T1227		2000207	Cisco 2500 Watt Power Supply	Cisco	Power Supply	Room: Serv 100	Standalone	Available	Cisco	Erate	Order
T1228		2000207	Cisco 2500 Watt Power Supply	Cisco	Power Supply	Room: Serv 100	Standalone	Available	Cisco	Erate	Order
T1229		2000207	Cisco 2500 Watt Power Supply	Cisco	Power Supply	Room: Serv 100	Standalone	Available	Cisco	Erate	Order
T4880		2000204	Cisco UCS 5108 Server Chassis	Cisco	Server	Room: Serv 100	Standalone	Available	Cisco	Erate	Order

Tags Search Functionality

Tag Search - section allowing the application of filters and the saving of the filter, sort, and column organization settings

- **Save Search** - saves the current filter set established in the Basic Filters and Advanced Filters areas
- **Save Search As** - creates a new saved search based on the current filter set established in the Basic Filters and Advanced Filters areas
- **Saved Searches** - opens the Saved Searches window and allows the search of existing searches and the deletion of desired searches
- **Refresh** - refreshes and returns the Tags screen filters and search results grid to their original states
- **Go** - applies the filter settings (Basic Filters and Advanced Filters)

Did You Know?

The **Tags** screen can display all fields listed in the Advanced Filters drop down as columns of data. By doing this, it will require horizontal scrolling.

It is recommended to collapse the **Quick Links** area to maximize the on screen data.

Continued on next page



Basic Filters  - located above the Tags grid, allows a district administrative user to search for specific tag information using the following:

- **Site Name** - name the site/location goes by
- **Location** - includes: Rooms, Staff, Students, and Transfer
- **Product Type** - description of the different types or groups of products (such as laptop, calculator, printer, cell phone, etc...)
- **Status** - indicates the state or condition of the item (such as: Available - designated as available for the purpose of issuing, In Use - designated as not available to issue)
- **Asset Type** - displays Standalone, Parent, or Component (respective to the tag and if it has a current component relationship established)
- **Manufacturer** - company which produces the product
- **Funding Source** - the origin of financial resources used to purchase an item
- **Vendor** - name of an individual or a company who provides/supplies products to your district (similar to a supplier)

Advanced Filters  - located above the Tags grid, allows a district administrative user to search for specific tag information using the following:

Tag List  - Allows a user to filter by a specific tag. Tag numbers can be added by typing or scanning. Up to 500 tags can be searched at a time

Custom Filters:

- **Tag** - the unique identifier used to track items within Asset Mgmt. (may be an asset tag)
- **Serial** - if required by the district, a serial number recorded when the tag is initialized or received to a room
- **Product Number** - the number assigned to the product by the district
- **Product Name** - name of the product

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- **Manufacturer** - company which produces the product
- **Model** - manufacturer's specific version of the product
- **Product Type** - description of the different types or groups of products (such as laptop, calculator, printer, cell phone, etc...)
- **Other #1, Other #2, & Other #3** - optional fields used to track miscellaneous information regarding the product
- **Suggested Price** - suggested replacement price for the product
- **Site ID** - an alpha and/or numeric site number which likely corresponds with the student SIS system's site ID numbers
- **Site Name** - name the site/location goes by
- **Location ID** - an alpha and/or numeric number corresponding with the student/staff ID number or room number of the respective location
- **Location Description** - includes Rooms, Staff, and Students and their respective information
- **Location Type** - displays the assigned Staff Type or Room Type associated with the respective staff member or room
- **Status** - indicates the state or condition of the item (such as: Available - designated as available for the purpose of issuing, In Use - designated as unavailable to issue)
- **Status Notes** - displays any entered notes entered at the time of a status change
- **Custom Tag Field 1, 2, 3, & 4** - custom fields created by a district administrative user
- **Tag Notes** - displays any entered notes
- **Due Date** - allow users to assign a due date to a tag/item distributed to a staff member or a student, which then tracks when tags/items become past due.

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IN THE KNOW

- **Source** - the origin of the tagged inventory item: Initial (item was initialized), Imported (item was imported into Asset Mgmt.), or Order (item was received from a purchase order)
- **Order Number** - an alpha and/or numeric purchase order number
- **Funding Source** - the origin of financial resources used to purchase an item
- **Purchase Price** - amount entered by the administrator level when adding the product to the respective purchase order (may be different than the product's suggested price)
- **Purchase Date** - date the purchase is submitted to a vendor and also used to calculate the item's expiration date
- **Vendor** - name of an individual or a company who provides/supplies products to your district (similar to a supplier)
- **Account Code** - an alpha and/or numeric code indicating a district specific financial tracking number
- **Projected Life** - number of years the district administrator predicts this product is deemed to be usable
- **Expiration Date** - is calculated by subtracting the Purchase Date by the district's predicted Projected Life in number of years
- **Last Scan By** - the Asset Mgmt. user name who last issued or changed the status of this tag
- **Last Scan Date** - the date this tag was last issued and/or a change of status was made in Asset Mgmt.

Filter the Tags grid using any of the column headers and filter settings including:

- | | | |
|----------------------------|-------------------------|----------------|
| • Contains | • Not Between | • Ends With |
| • Starts With | • Is Empty | • Not Equal To |
| • Equal To | • Is Null | • Less Than |
| • Greater Than | • Does Not Contain | • Not Is Null |
| • Greater Than or Equal To | • Less Than or Equal To | |
| • Between | • Not Is Empty | |

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Controls for Results Grid

- **Edit Columns**  - located at the top of the Tags grid, allows a district administrative user to manipulate the columns within the Tags grid by adding or removing Asset Mgmt. data fields
- **Moving Columns** - data fields displayed in the Tags grid can be repositioned by dragging the desired column to a new location within the grid
- **Sort** - arranges the grid's data by column. Single click on a field's blue grid header to sort the Tags grid ascending, click a second time to sort descending, and a third time to clear the sort.

The Bulk Edit  feature provides administrative administrators with editing capabilities for a filtered set of initialized tags. Bulk edits currently available are:

- **Purchase Date** - date the purchase is submitted to a vendor and it is also used to calculate the item's expiration date (may be the date the item's warranty goes into effect)
- **Purchase Price** - amount entered by the Administrative Administrator when adding the product to the respective purchase order (may be different than the product's suggested price)
- **Funding Source** - the origin of financial resources used to purchase an item
- **Custom Field**- custom fields created by a district administrative user
- **Due Date** - allow users to assign a due date to a tag/item distributed to a staff member or a student, which then tracks when tags/items become past due.
- **Status** - indicates the state or condition of the item (such as: Available-designated as available for the purpose of issuing, In Use - designated as unavailable to issue)

Quick Transfer  - located at the top of the Tags grid, allows a district administrative user to move available tags from one location to another without scanning each respective tag

- **Room to Room** - allows the quick transfer of available tags from a room to a destination room within the same site using the Tags filters to select the desired tags
- **Site to Site** - allows the quick transfer of available tags from a site or multiple sites to a room at a destination site using the Tags filters to select the desired tags



Tags Reports

The **Tags** page provides reports to be viewed/printed.

- **Inventory Quantity Report** - displays, in PDF format, tag quantity based on selection. User has opportunity to select a Site Summary and to Include Untagged Inventory.
- **Archived Inventory** - displays, in XLS format, tags within Asset Mgmt. which have been archived, including detailed information regarding each tag (includes the archiving process details).
- **Components Listing** - displays, in CSV format, a listing of all current component tags and parent tags within the district.
- **Room Audit Detail Report** - displays, in XLS format, tags and their respective audit state for room audit(s) within a respective site.
- **Status Lifecycle Report** - displays, in CSV format, tag information for qualifying items which have been in the selected status and time frame (specified by the filter set).
- **Tag Listing** - complete listing, in CSV format, of tags within Asset Mgmt. containing detailed information regarding each tag.
- **Tag Depreciation Report** - complete listing, in CSV format, information related to the value of tags as determined by select filters and provides the depreciation value of the tags.

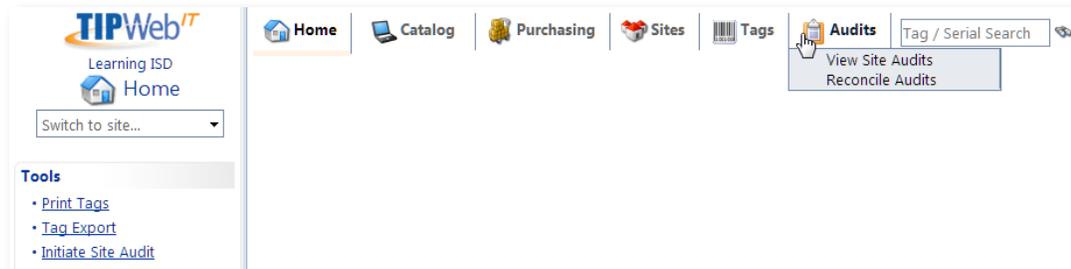
Did You Know?

If the **Tags** grid is filtered before selecting the **Tag Listing** report, the report will display only the filtered tag information.



Audits Introduction

The **Audits** page provides the administrative level the ability to initiate, view the progress, and reconcile site level room audits.



Initiate Site Audit

Initiate Site Audit, located on **Quick Links** under **Tools**, allows the administrative level to create room audits by Site, Product Type, and/or Room Type.

- **Audit Name** - reference given to the audit by the district level administrative administrator who created the audit
- **Site** - multi select drop down menu containing a list of the site names contained within Asset Mgmt.
- **Product Type** - multi select drop down menu containing a list of product types within Asset Mgmt.



- **Room Type** - multi select drop down menu containing every room type within Asset Mgmt.
- **Ignore Tags Modified After** - a calendar tool excluding all tags from room audits brought into Asset Mgmt. after the date indicated

View Site Audit

View Site Audit, located on the top navigation bar under **Audits**, allows the administrative level to view all site audits created by the administrative level and the site's progress in performing the respective room audits.

Audit Name	Site	Created Date	Last Modified Date	New	In Progress	Finalized	Closed	Progress	Actions
Learning ISD Audit on 07/01/2014	Dixon Elementary	07/01/2014	02/29/2016	0	0	4	31	Approved	[Icons]
Learning ISD Audit on 06/10/2014	Learning Campus	06/10/2014	06/10/2015	0	0	1	23	Approved	[Icons]
Learning ISD Audit on 06/10/2014	Charles Bailey High School	06/10/2014	06/10/2014	0	0	1	98	Approved	[Icons]
Learning ISD Audit on 06/10/2014	Learning Campus	06/10/2014	06/10/2014	0	0	1	29	Approved	[Icons]
Learning ISD Audit on 02/08/2014	Eight Elementary	02/08/2014	02/29/2016	0	0	18	16	Approved	[Icons]
Learning ISD Audit on 02/08/2014	Carlson Middle School	02/08/2014	02/29/2016	0	0	33	0	Approved	[Icons]
Learning ISD Audit on 02/08/2014	Charles Bailey High School	02/08/2014	02/29/2016	0	0	1	109	Approved	[Icons]
Learning ISD Audit on 02/08/2014	Cypress Springs Middle School	02/08/2014	02/29/2016	0	0	17	17	Approved	[Icons]

- **Audit Name** - reference given to the audit by the district level administrative administrator who created the audit
- **Site** - name of the site/location for which the audits have been created
- **Created Date** - displays the date the audit was created
- **Last Modified Date** - displays the last date any room audit within the respective site has been modified (includes changing the audit status)
- **New** - displays the number of room audits created, respective to the site
- **In Progress** - displays the number of room audits, respective to the site, in the room audit status of In Progress
- **Finalized** - displays the number of room audits, respective to the site, in the room audit status of Finalized

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- **Closed** - displays the number of room audits, respective to the site, in the room audit status of Closed
- **Progress** - displays the percentage of room audits, respective to the site, in the room audit status of Finalized and Closed
- **Actions Column:**
 - **Move to Reconcile** - The administrative level can quickly reconcile tags
 - **Finalize Audits** - changes all of the room audit statuses from In Progress to Finalized
 - **Restrict Site Access** - when selected, restricts site level users from: Finalizing an audit within the respective room, Deleting a district created room audit, and Removing product(s) from a district created room audit
 - **District Audit Details** - opens the District Audit Details window, lists each room audit's summary information assigned to the district created site audit

Reconcile Audits

Reconcile Audits, located on the top navigation bar under **Audits**, allows the administrative level to change tag statuses (located within Finalized audits) based on the filtered results of the respective room audit results (includes site created room audits and district created room audits).

Audit State	Tag	Product Name	Funding Source	Last Scan Date	Expected Location	Audit Location	Audit Date	Actions
Misplaced	T9075	17 inch V173-Djb LCD Monitor	District-Bond	02/08/2014	Learning Campus Room: 22	Learning Campus Room: 21	06/10/2014	Select Action
Misplaced	T9095	17 inch V173-Djb LCD Monitor	District-Bond	02/28/2013	Learning Campus Room: 21	Learning Campus Room: 20	06/10/2014	Select Action
Misplaced	7001	ELMO EV-4400AF	General	02/23/2011	Dixon Elementary Room: 105	Dixon Elementary Room: 104	07/01/2014	Select Action
Misplaced	3801	Lenovo ThinkCentre M57e - 6305	General	02/07/2011	Learning Campus Room: 8002	Learning Campus Room: 8001	06/10/2014	Select Action



-  **Show Filters** - allows the administrative level to search for specific tag information in order to identify tags available to reconcile (at least one filter must be selected)
 - **Audit Name** - unique alpha/numeric assignment to a district created audit
 - **Tag Audit State** - multi select drop down menu containing a list of available tag audit states within Asset Mgmt.
 - **Room Audit Status** - multi select drop down menu containing a list of audit statuses (includes Closed, Finalized, In Progress, and New)
 - **Product Type** - multi select drop down menu or auto search field containing a list of product types within Asset Mgmt.
 - **Asset Type** - multi select drop down menu containing a list of tag component associations (Standalone, Parent, or Component)
 - **Site Name** - multi select drop down menu containing a list of each site by name within Asset Mgmt.
 - **Expected Location Site** - multi select drop down menu containing the option to display results which matching the audit site or results not matching the audit site
 - **Expected Location Type** - multi select drop down menu containing a list of location types (Room, Staff, and Student)
 - **Funding Source** - the origin of financial resources used to purchase an item
 - **Audit Date** - calendar tool identifying the date the audit was created
 - **Last Scan Date** - calendar tool identifying the date a tag was last audited
 - **Price** - a filter respective to each tag's purchase price (may be different than the product's suggested price)
 - **Tag** - unique identifier affixed to each item (which could be a district asset tag) and used to track individual items within Asset Mgmt.

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- **Reconcile Audits Grid** - displays tags and their audit details respective to the audit filters
- **Reconcile**  - opens the Reconcile Inventory window and allows user to take action in bulk on the filtered tags
- **Audit State** - displays respective tag audit states (Missing/Misplaced/Verified)
- **Tag** - unique identifier affixed to each item (which could be a district asset tag and/or a Asset Mgmt. created tag number) and used to track individual items within Asset Mgmt.
- **Product Name** - name of the product
- **Funding Source** - the identified source used to purchase the tag
- **Last Scan Date** - the date the tag was last issued and/or a change of status was made in Asset Mgmt.
- **Expected Location** - the current location associated with the tag
- **Audit Location** - the physical place within the site where the tag was found
- **Audit Date** - displays the date the audit was conducted
- **Actions Column** -
 - **Select Action** - line item drop down menu tool to reconcile the respective tag with the available reconciliation options

Audits Reports

The **Reconcile Audits** page provides a report to be viewed/printed respective to the search results displayed in the grid.

- **Audit Detail Report** - displays, in XLS format, tags and their respective audit state for room audit(s) within a respective site



ACTION ITEMS

List and prioritize Asset Mgmt. related processes needing to be accomplished in the near future.

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