DALLAS
INDEPENDENT SCHOOL DISTRICT

TIPWeb-IT Asset Management

Reference Guide-Site

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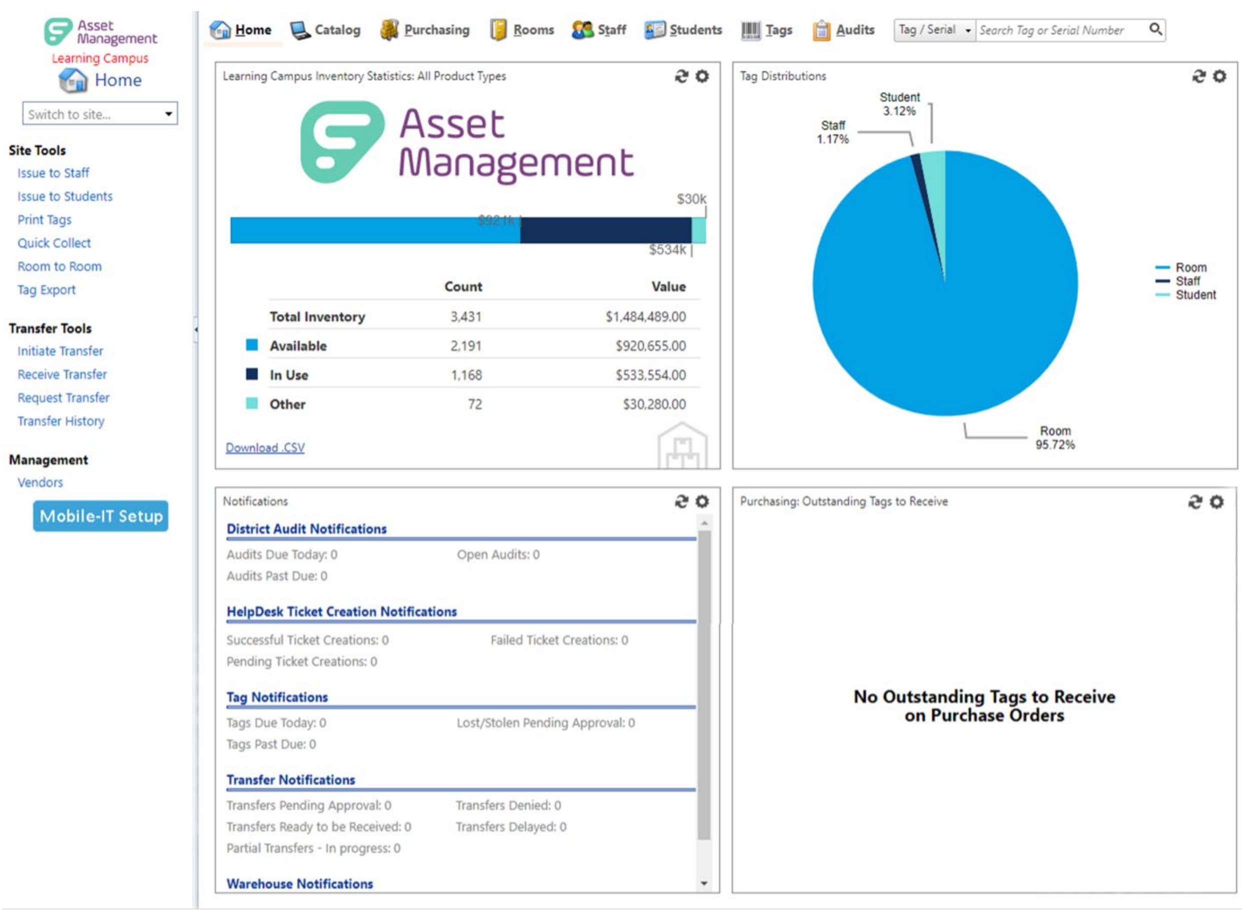
Getting Started

Site View Dashboard

The Asset Management **Home** page is a customizable dashboard for each user based on their permissions. The dashboard is customized through various alerts, clickable links, application notifications, and **site-wide** information.

Note: Dashboard preferences may be different at the administrative and site level.



General Dashboard Elements

Home Dashboard

Function	Description
District Logo	Displays a district-provided .jpg or .gif image (400 pixels wide by 100 pixels tall) on all Asset Management home screens (admin view and site view)
Site Name	**Displays the assigned Site Name identified in Asset Management "Sites" grid**
View Switch 	**Allows a user assigned to multiple sites to switch the current screen to another assigned site by entering the name of the site or selecting it from the drop-down menu**

Site Tools Quick Links

Function	Description
Issue to Staff	Allows a site to issue an item in the status of "In Use" to a staff member
Issue to Students	**Allows a site to issue an item in the status of "In Use" to a student**
Print Tags	**Allows a site to print new tag labels and affix them to each tracked item (NOT USED AT DALLAS ISD)**

Function	Description
Quick Collect	Allows a site to collect "In Use" items to a room or transfer them
Room to Room	Allows items to be moved from one room to another within a site through a process called "Room-to-Room Transfers"
Tag Export	Allows a site to compile a report showing all tags within Asset Management respective to the site

Transfer Tools Quick Links

Function	Description
Initiate Transfer	Allows items to be moved from one site to another through a process called "Site-to-Site Transfers"
Receive Transfer	Allows items to be moved from one site to another through a process called "Site-to-Site Transfers"
Request Transfer	Allows items to be requested from a Warehouse through a process called "Warehouse-to-Site Transfers"
Transfer History	Allows an administrator to search for, view, and/or print Transfer Tickets for all site-to-site transfers (in any status) throughout the district

Management Quick Links

Function	Description
Vendor	Individuals and/or companies who provide goods or services to your district (similar to a supplier)

Top Navigation Bar

View is dependent on access given by the Administrative Administrator.

Function	Description
Home	Displays district-provided logo, switch to site drop-down menu, clickable alerts, tag-related detailed graphs, site-wide inventory statistics, and Mobile-IT Setup
Catalog	Displays product details within the site and respective location information
Purchasing	Allows a site-level administrator to view district-created purchase orders, create site-level purchase orders, and receive and assign items to rooms while simultaneously recording essential purchasing data
Rooms	Displays the locations you will see and account for items within your district

Function	Description
Staff	Allows a site-level administrator to add or edit a staff member's details and track inventory assigned to them
Students	Allows a site-level administrator to add or edit a student's details and track inventory assigned to them
Tags	Allows a site-level administrator to use "Basic" and "Advanced" filters to search, view, and/or print asset details respective to this site. This is an on-screen way to access the data also located in the "Tag Export."
Audits	Provides the ability to initiate, view progress, and reconcile tag audit states
Quick Search	Allows a user to search quickly for a specific tag, serial number, student, or staff member
Help	Takes user to the Learning Center, where you will need to search for the issue using keywords
User	Identifies the user currently logged in to the Asset Management application and allows the user to log off from the application

Panel Display Reports

Displays options for users to customize the dashboard panel view including statistics, notifications, and/or alerts.

Function	Description
None	Quadrant is left blank
Notifications	Shows audits, tags, and transfers at this site requiring action by a user
Outbound Transfers Pending Approval	Shows transfer #, created date, destination site, and progress for transfers initiated or received at this site.
Staff Status	Shows a list of staff, including Staff ID, Staff Name, Status and Inventory Count for this site. Filters include Staff Status, Staff Inventory and Staff Location Site.
Purchasing: Outstanding Tags to Receive	Shows quantity of tags to be received on a purchase order (at this site). Filters include Tagging Overdue By and Purchase Date Range.
Inventory Statistics	Shows quantity and monetary value of inventory at this site (total, available,

Function	Description
	and in use). Filters include Product Type.
Tag Distributions	Shows the breakdown of assigned tags by percentage/quantity for this site.
Tag Status Change Over Time	Shows the trend of tags, according to selected status, over a period of time for this site. Filters include Status and Date Range.
Tag Status Change Over Time	Shows status of tags allotted to a room at this site.
User Login	Shows which users have logged in to Asset Management at this site during an allotted period of time. Filters include User Roles, User Types and Date Range.

Quick Search Tool

Quick Search is located along the top navigation bar of Asset Management from the administrative and site view. It allows a user to search for a specific tag, serial number, student, or staff member.

Search for a Tag

1. Enter a tag number in the Tag/Serial search field (it can be made up of alpha and/or numeric characters). After entering 3 characters, a list of tags auto-populates.

2. Click on the respective tag number. The "Tag Information" window opens and displays the details of the tag.

3. To search for another tag, you can return to the Tag/Serial search bar or use the **Tag** field, located within the "Tag Information" window, and repeat steps 1 and 2.

4. Click on **Close** to close the "Tag Information" window.

Search for a Serial Number

To search by serial number, at least 3 alpha and/or numeric digits are required.

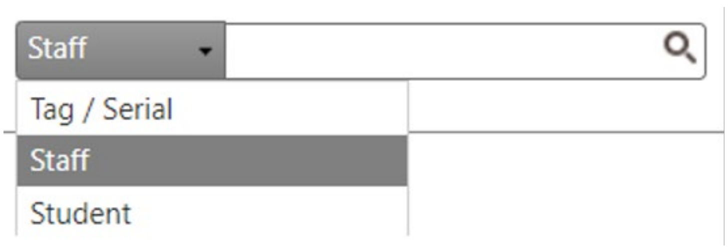
1. Enter part or all of the item's serial number in the **Tag/Serial** search field (it can be made up of alpha and/or numeric characters). After entering 3 characters, a list of serial numbers auto-populates.

2. Click on the respective serial number. The "Tag Information" window opens and displays the details of the tag.

3. To search for another serial number, use the **Tag/Serial** field, located within the "Tag Information" window, and repeat steps 1 and 2.

4. Click on **Close** to close the "Tag Information" window.

Search for a Staff Member



1. Click the **Tag/Serial** drop-down menu, located in the top navigation bar.
2. Click **Staff**.
3. Type the Staff ID number or name in the **Staff** search field.
4. When you have entered 3 characters, a list of names will begin to auto-populate.
    - If the staff you are searching for displays, click the name.
    - If the staff you are searching for does not display, enter the complete name and click the **Begin Search** icon or press **Enter** on the keyboard. If a matching staff is found, click the name.
    - When entering a Staff ID, it must be exact in order to find a result.
5. The "Staff Information" window opens and displays the details of the staff.
6. Click on **Close** to close the "Staff Information" window.

Search for a Student

1. Click the **Tag/Serial** drop-down menu, located in the top navigation bar.

2. Click **Student**.
3. Type the Student ID number or name in the **Student** search field.
4. When you have entered 3 characters, a list of names will begin to auto-populate.
    - If the student you are searching for displays, click the name.
    - If the student you are searching for does not display, enter the complete name and click the **Begin Search** icon or press **Enter** on the keyboard. If a matching student is found, click the name.
    - When entering a Student ID, it must be exact in order to find a result.
5. The "Student Information" window opens and displays the details for the student.
6. Click on **Close** to close the "Student Information" window.

Tag Information Overview

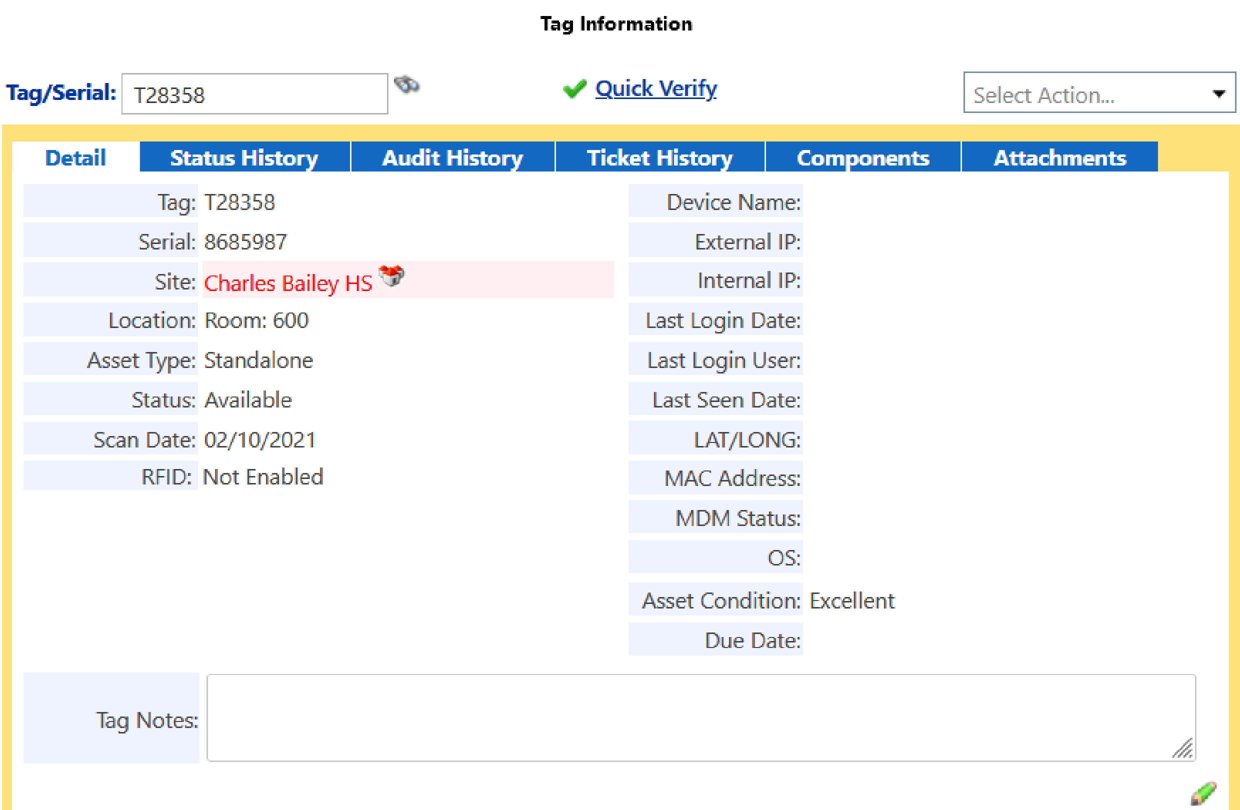
The "Tag Information" window displays every field that is tracked for one asset in the database. This window is accessible from the "Quick Search" feature in the top navigation bar. It allows a user to search for a specific tag or by an item's serial number (a minimum of 3 digits are required), review details regarding the tag, edit tag-specific information, or move a tag's location.

Within the **Status History** tab, **Audit History** tab, and **Attachments** tab, the grids are sorted from newest to oldest. Therefore, the most recent information will always be at the top of the respective grid.

Detail Tab

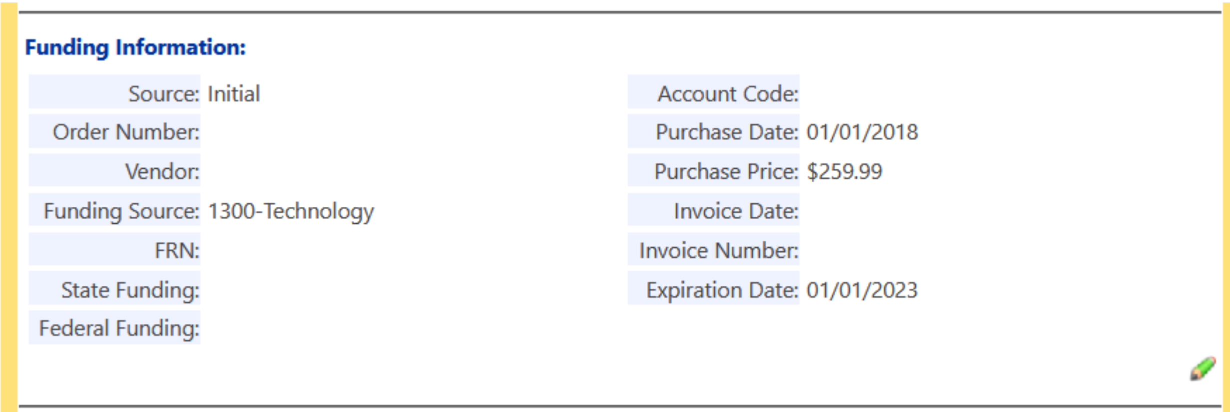
The **Detail** tab displays information about an asset such as location and status, funding, and product information.

Tag Information



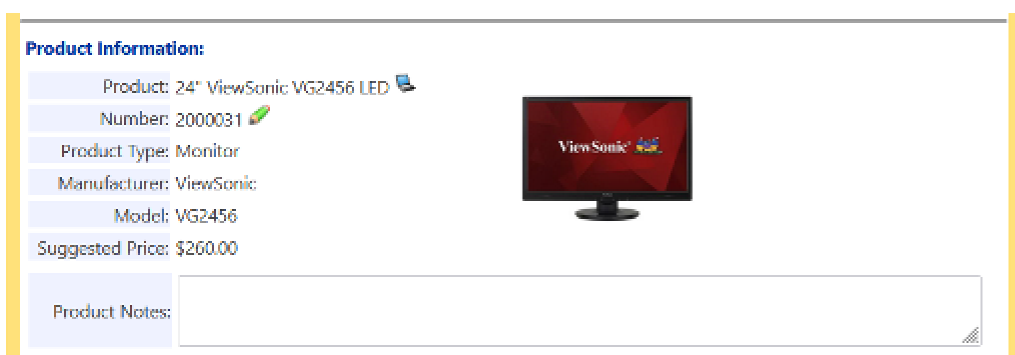
- **Tag Number** - The unique identifier that is used to track items within Asset Management (may be an asset tag)
- **Serial Number** - If required by the district, a serial number that was recorded when the tag was issued for a product
- **Site** - Name of the site where this tag currently resides. The icon to the right of the site name is clickable and will take you to the respective location displayed.
- **Location** – Displays the location type and name within the site where this tag currently resides (displays red if tag is not located at your location)
- **Asset Type** – Displays whether this asset is a standalone, parent, or component
- **Status** - Displays the current status of this asset (e.g., "In Use," "Available," "Lost," "Disposed")
- **Transfer Number** - Displays when the asset status is "Pending Transfer"
- **Scan Date** – Displays the last date this asset had and change of status and/or location
- **RFID** - "Enabled," "Not Enabled," or "Not Found"
- **Mobile Device Management integration fields** ("Device Name," "External IP," "Internal IP," "Last Login Date," "Last Login User," "Last Seen Date," "LAT/LONG," "MAC Address," "MDM Status OS") – These fields contain data that is migrated from a mobile device management system such as Google Suites or JAMF
- **Custom Fields** – Custom field configured by the district
- **Tag Notes** – Notes pertaining to this tag
- **Due Date** – If issued to a staff or student with a set due date, the due date is shown here

Funding Information



- **Source** – Indicates whether the asset was added via the purchasing grid (order) or the room initialization process (initial)
- **Order Number** – Purchase order number used to purchase this asset
- **Funding Source** – Funding source used to purchase this asset
- **Account Code** – Account code applied to the purchase of this asset
- **Vendor** – Vendor this asset was purchased from
- **Purchase Date** – Date this asset was purchased
- **Purchase Price** – Price paid for this asset
- **Expiration Date** – Date this asset is projected to be replaced

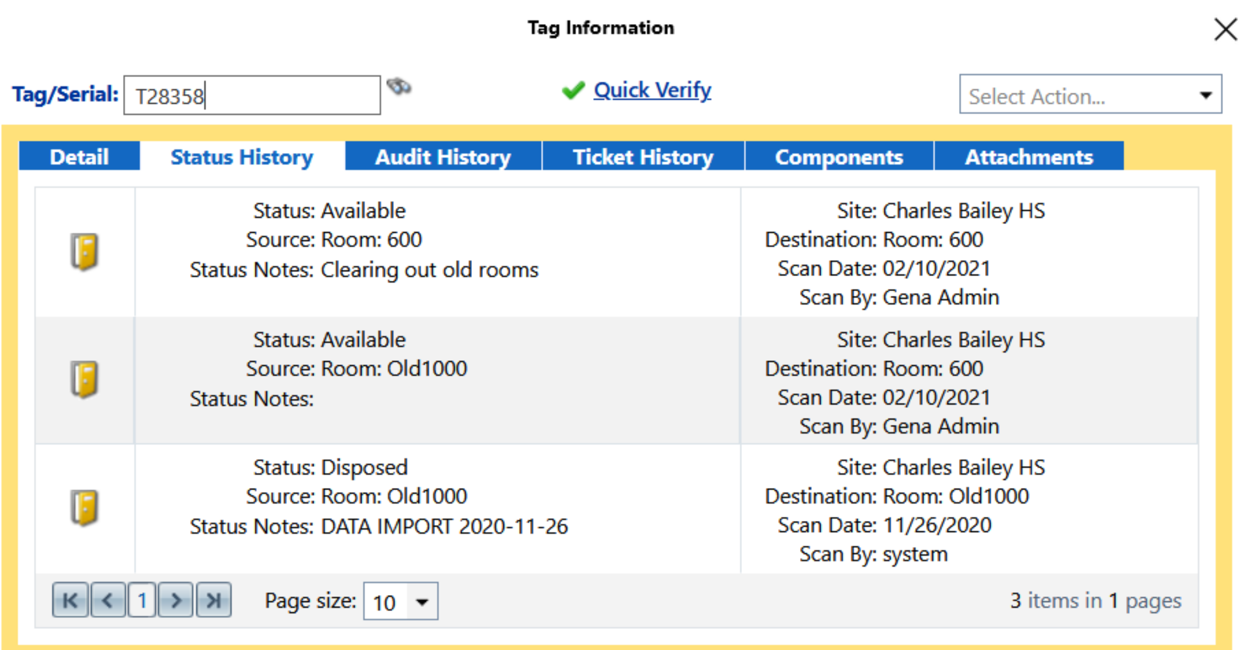
Product Information



- **Product** – Name of the product this asset is associated with

- **Product Number** – Number of the product this asset is associated with
- **Product Type** – Type of product this asset is associated with
- **Manufacturer** – Manufacturer of the product this asset is associated with
- **Model** – Model of the product this asset is associated with
- **Suggested Price** – Average cost of the product this asset is associated with
- **Product Notes** – Notes pertaining to the product this asset is associated with
- **Product Image** – Image of the product this asset is associated with

Status History Tab

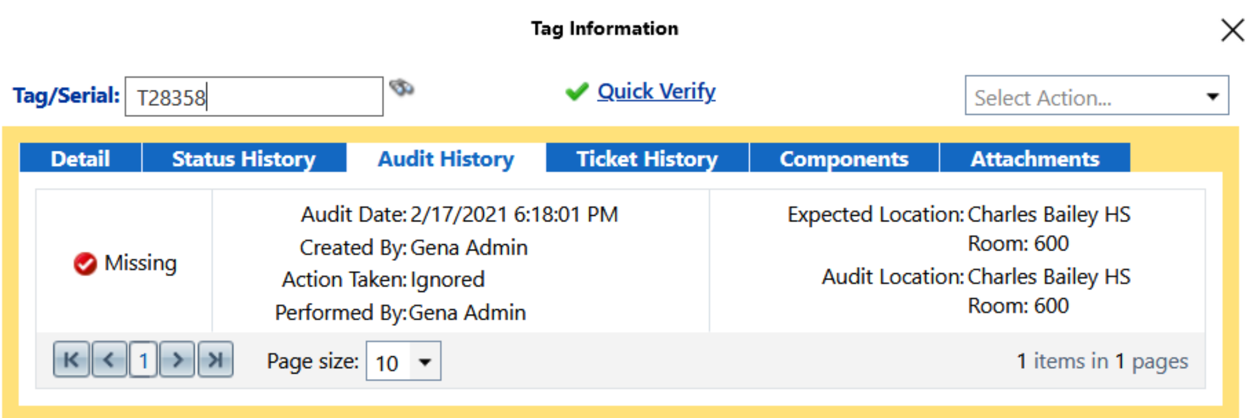


Each "Status History" record sorts by newest to oldest scan date.

- **Status** – Asset status at the time of the log entry
- **Source** – Location of asset at the time of the log entry
- **Status Notes** – Notes entered during the action
- **Site** – Site of asset at the time of the log entry

- **Destination** – Destination of asset if entry is recording a transfer
- **Scan Date** - Date the action was taken (issued or change of status)
- **Scan By** – Person logged in when action was taken

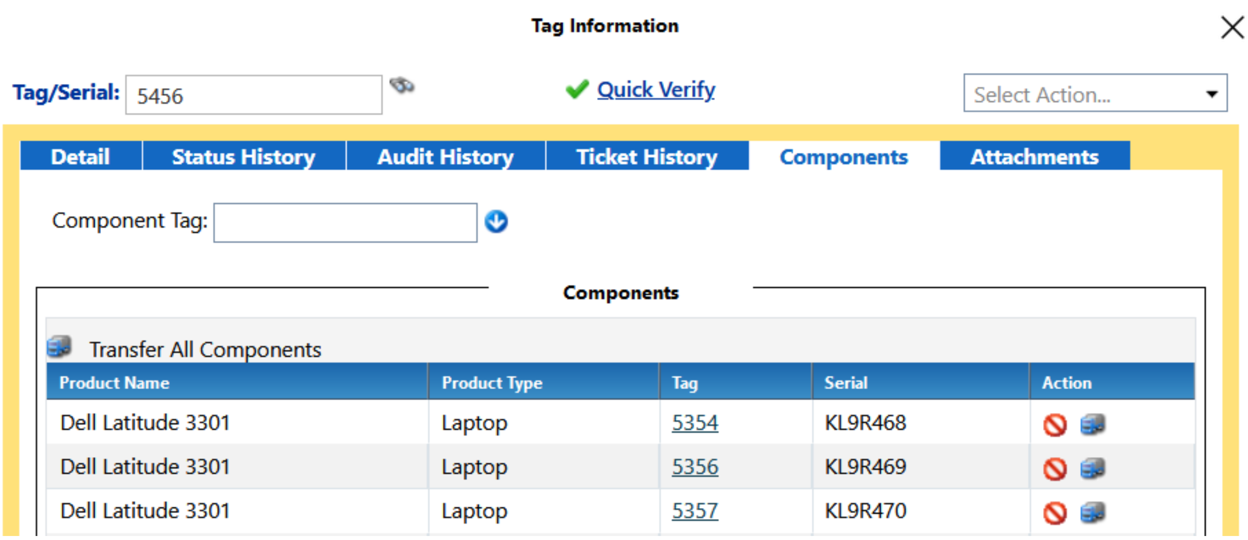
Audit History Tab



This tab shows each tag audit state record.

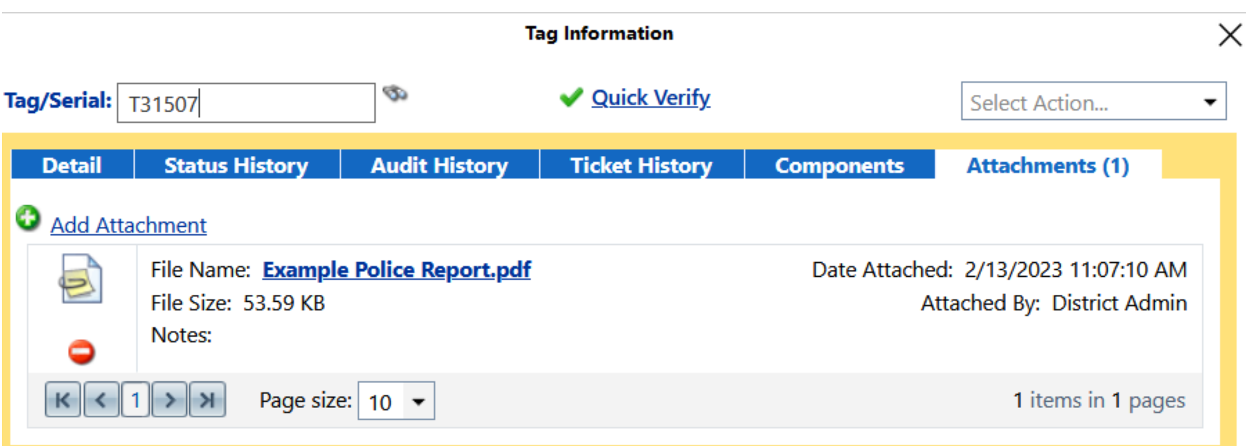
- **Tag Audit State** – State of asset at time of audit reconciliation
- **Audit Date** – Date audit was initialized
- **Created By** – Name of person who created the audit
- **Expected Location** – Expected location of asset at the time of the audit
- **Audit Location** – Location where asset was scanned during audit (or where expected if not scanned)

Components Tab



- Information regarding the respective "Asset Type" the tag is assigned
- Component processes
    - Remove established relationships
    - Assign a tag to another tag
    - Transfer 1+ component to another tag/parent

Attachments Tab



- Each attached file

- **File Name** – Name of attached file
- **File Size, Notes** – Size of attached file
- **Date Attached** – Date file attached
- **Attached By** – Name of person who attached the file

Tag Information Reports

- **Tag Lifecycle Report** – Accessible in the "Select Action" dropdown, this report displays, in CSV format, all events associated to a tag's life within Asset Management. Fields include "Event Date," "Event User," "Event Name," "Tag Status," "Tag Site Update," "Tag Location Update," and "Event Details."

Note: Tag search results for districts with the "Departments" feature enabled will display the department to which the tag is assigned. If the user viewing the tag search results is not assigned to the respective tag's assigned department, the "Department" field will be red.

Asset Status and Location Guidelines

This article describes the basic rules associated with asset status and location guidelines.

Asset Location

Assets must be located in one of the two following areas:

In a room		*OR*		With a Staff or Student

Asset Movement

Assets can move via the following areas:

Room to room within a site	Site to site
Staff/Student to room	Room to Staff/Student

Asset Rules

Consider the following asset rules below.

Each Status Change relies on the Status AND Location of the Tag being changed.

Status	Location	Status Change
Available	Room/Site	• Collect: Not Allowed

Status	Location	Status Change
		• Transfer: All Statuses *except* Lost & Stolen • Direct Change: Any Status
In Use	Issued to Staff/Student	• Collect: Any Status • Transfer: Not Allowed • Direct Change: Not Allowed
In Use	Room/Site	• Collect: Not Allowed • Transfer: Any Status *except* Lost & Stolen • Direct Change: Any Status
Actioned, Disposed, Recycled, Sold, Stolen, Returned to Vendor, Used for Parts	Room/Site	• Collect: Any Status • Transfer: Any Status *except* Lost & Stolen

Status	Location	Status Change
		• Direct Change: Not Allowed
Surplus	Room/Site	• Collect: Any Status • Transfer: Any Status except Lost & Stolen • Direct Change: Auctioned, Disposed, Recycled
In Repair, Lost	Issued to Staff/Student	• Collect: Any Status • Transfer: Any Status except Lost & Stolen • Direct Change: In Use
In Repair, Lost	Room/Site	• Collect: Any Status or Quick Return • Transfer: Any Status except Lost & Stolen • Direct Change: Not Allowed

Asset Management Common Icons

The following icons are common throughout Asset Management.

Icon	Functionality
	Adds something in regard to the area of Asset Management in which you are located
	Edit the applicable item
	Saves selected information
	Refreshes the content and returns the screen to its original state
	Search functionality
	Explore additional details respective to the record
	Displays a note respective to the record/item
	Displays any custom field information associated with the record/item
	Displays any accessories associated with the record/item

Customizing the Site User Dashboard

Asset Management allows each user with "Site View" permissions to customize the reports in each **Home** dashboard panel as well as changing or updating **User Profile** information.

Customizing Dashboard Panels

The Home page dashboard consists of four customizable panels of specialized information that populate when the Home page is accessed. Panel options may include statistics, tag distributions, alert notifications, or tag status changes.

The dashboard initially is the same for all users. As a user updates the dashboard, it becomes specific to that user. The user's customized preferences are applied to any site they have permission to access.

Dashboard preferences may be different at the administrative and site level.

1. Click the **Panel Settings** icon in the upper right corner of the respective panel. The "Panel Settings" window opens.
2. Select the respective panel from the **Panel Display** drop-down menu. If no panel is desired, select **None**.

   Example: Select **Notifications** for a list of notifications about what is currently happening with inventory within the user's site. Filter information, if required.

3. Click on **Save**. The dashboard updates to reflect the changes.

Audits

Conduct a Site or District Initiated Audit

An Audit allows a site to scan tags associated to a Room, Staff, and/or Student and quickly identify missing or misplaced items.

How an Initiated Audit Works

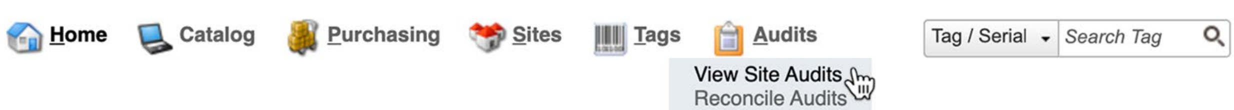
When a district or site level audit is initialized, each asset is recorded as being "missing" in the room it was located at the time of audit initialization. To conduct the audit, each site then opens a room in the audit, scans all tags found in that room, moves to the next room, and so forth, until all rooms in the audit have been scanned.

Tags that are scanned during the audit will be "Verified," "Found," or "Misplaced" depending on where they were scanned. Tags that are included in the audit, but not scanned, will remain as "Missing" until the reconciliation process is complete. Other activity that may take place during an audit includes recording an Asset Condition, adding new assets via Room Initialization, and defining new products in the Catalog.

Conduct an Audit

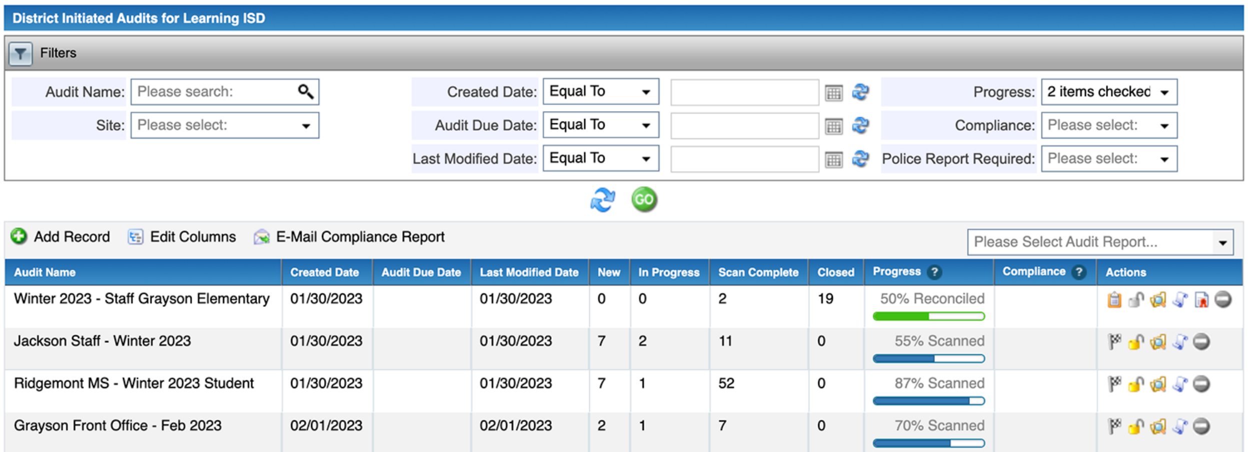
Audits in the status of "New" or "In Progress" will be listed in the Audits grid at each Site. The purpose of an audit is to verify that assets are being recorded in the correct location and to locate lost or stolen assets. Audits will also identify assets that for some reason have not yet been added to your Asset Management database. Once an audit has been initialized, the Site users will conduct the audit.

1. Click **Audits** in the top navigation bar and select **View Site Audits** from the dropdown.



This selection opens the District Initiated Audits page.

2. Reference the Filters section at the top of the page, as needed, to define results by Audit Name, Site, Created Date, etc., or locate the audit in question directly from the Audit grid.



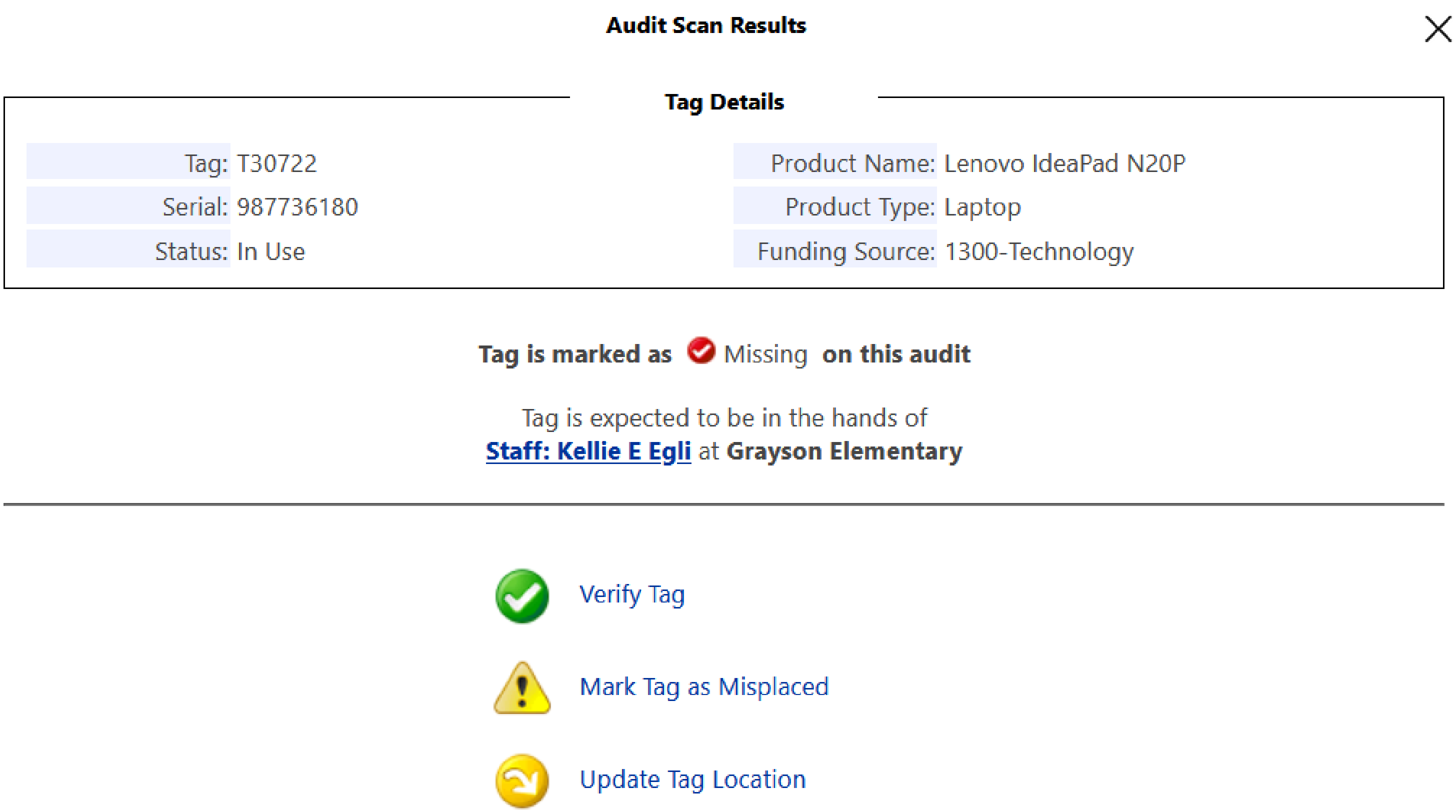
3. Click on the respective audit's row. The District Audit Details window opens.
4. Search for the respective room, staff, or student. *The location column is searchable. Enter/scan the respective room, staff, or student.
5. Click **Edit**, located on the respective row. The Room Audit window opens.
6. Enter/scan each tag number expected for the room, staff, or student into the Enter Tag field.
7. If desired, select the asset's condition from the Condition dropdown. A saved message displays.

If an unintentional tag is entered/scanned in an audit, there is a limited time in which to undo this entry. Expand the grid for the respective product and locate the tag. Under the Actions header, click on **Undo** to remove the tag from the audit. If the icon is grayed out, you can no longer perform this action.

If a tag is entered, which is not expected for the current room/staff/student, the Audit Scan Results window opens. Click the dropdowns below to follow the steps based on the audit location type.

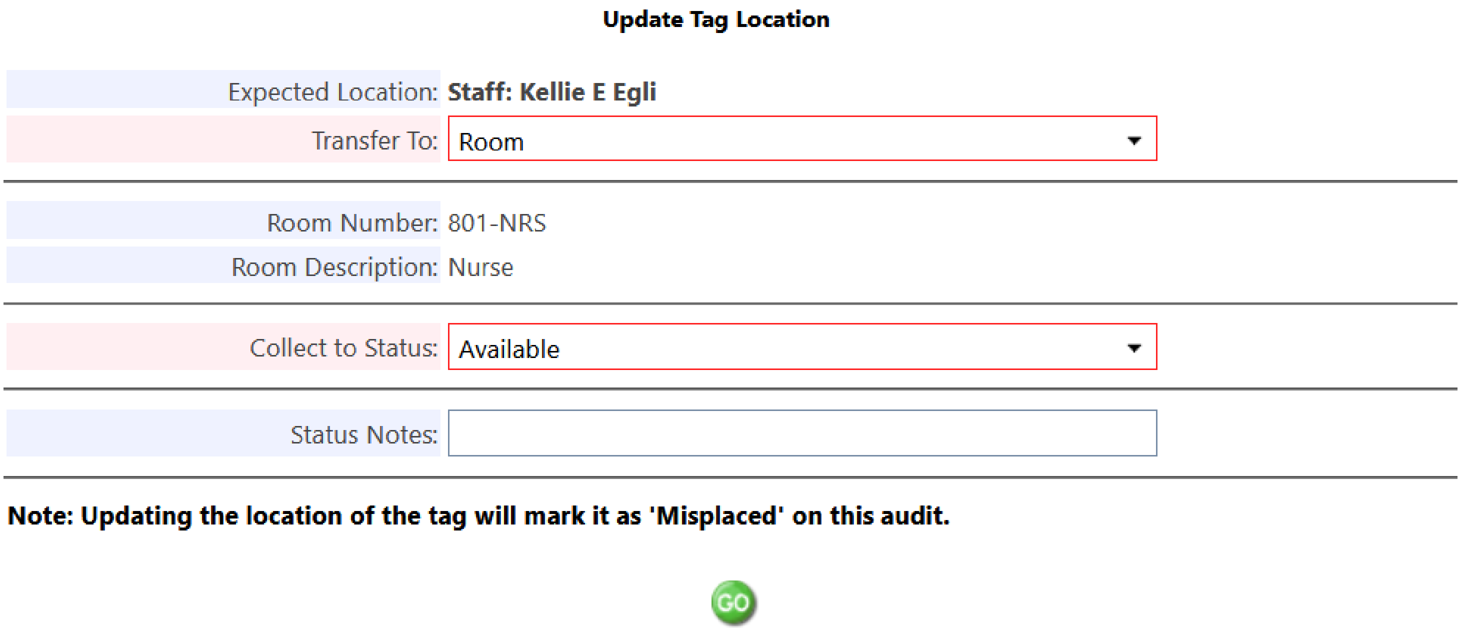
Room Audit Actions

If a tag that was expected to be in a location type of "Staff" or "Student" is scanned into a Room, the Audit Scan Results window will open.



1. Select the Action for the scanned tag.

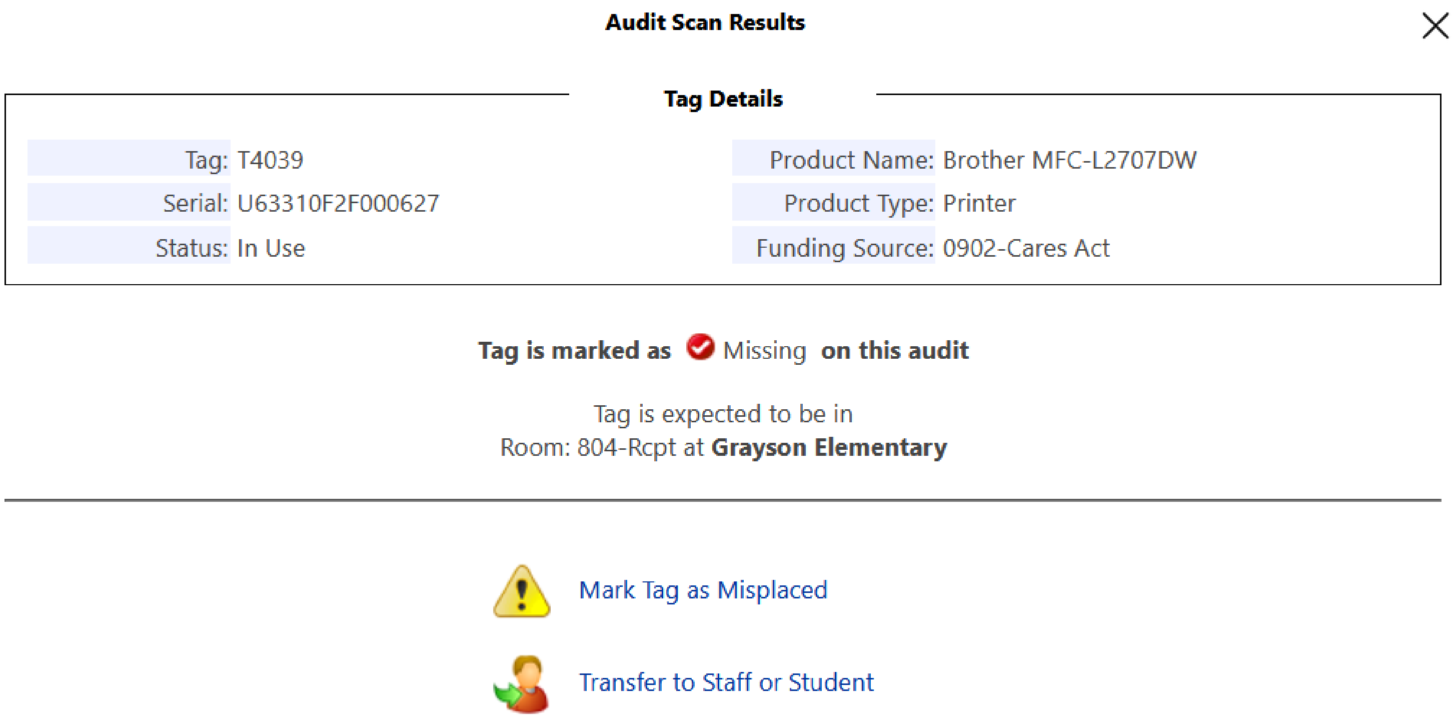
Verify Tag	Indicates that the tag is located with the staff or student mentioned in the message and should not be moved to the room as part of the audit.
Mark Tag as Misplaced	Indicates the tag is in the room and a site or admin level user will make the final determination about its location during reconciliation.
Update Tag Location	Indicates the tag should be moved to the room currently being scanned. This option will open the "Update Tag Location" window.



2. Select **Room** from the "Transfer To" dropdown menu.
3. Select the respective status from the Collect to Status dropdown menu. (Room)
4. Enter any notes into the Status/Audit Notes field (optional).
5. Click **GO**.
6. Click “**X**” to leave the Room Audit window and leave the room audit in a status of “In Progress”.
7. Click **Complete Scan** to close the Room Audit window and change the room audit status from "In Progress" to "Scan Complete."

Staff/Student Audit

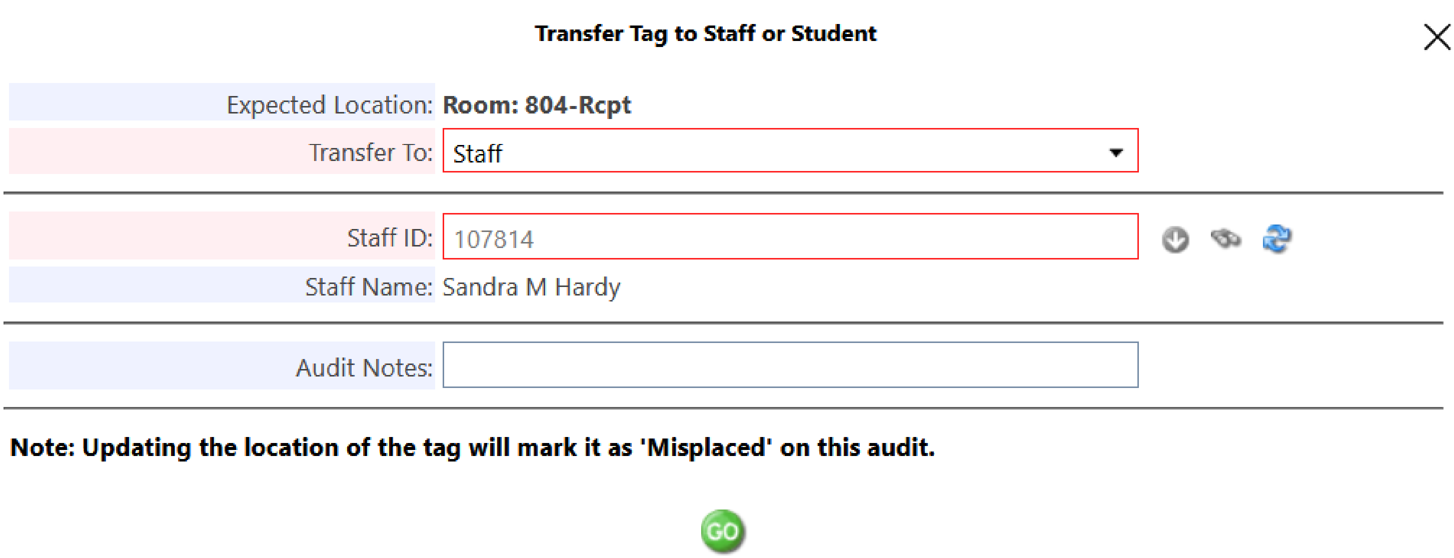
If a tag that was expected to be in a location type of "Room" is scanned into a Staff or Student, the Audit Scan Results window will open.



1. Select the Action for the scanned tag.

Mark Tag as Misplaced: Indicates the tag is in the hands of the staff or student and a site or admin level user will make the final determination about its location during reconciliation.

Transfer to Staff or Student: Indicates the tag should be moved to the staff or student where it was scanned. This option will open the "Transfer Tag to Staff or Student" window.



2. Verify/select the respective location in the "Transfer To" dropdown menu.

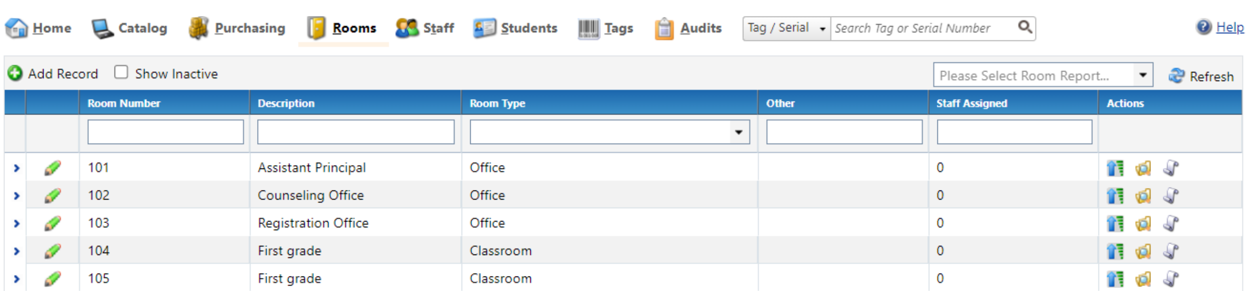
3. Verify/enter the respective staff/student in the "Staff/Student ID" field.
4. Enter any notes into the Audit Notes field (optional).
5. Click **Go**.
6. Click “**X**” to leave the Staff/Student Audit window and leave the room audit in a status of “In Progress”.
7. Click **Complete Scan** to close the Room Audit window and changes the room audit status from In Progress to Scan Complete.

Rooms

Rooms Grid Overview

The Rooms screen displays the physical location within a site to which an item is assigned. The Rooms grid allows you to search for active rooms (default) and inactive rooms (if "Show Inactive" is selected).

Rooms Functionality

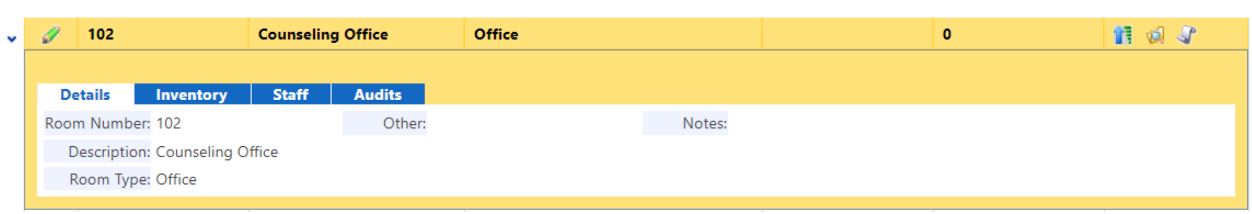


Rooms allow a site to perform multiple tasks pertaining to the creation of rooms and the inventory within each room.

Functions	
Add Record	Adds a room to this site.
Show Inactive	When checked, allows a site to search for and view any room marked as "inactive."
Search Fields	Located at the top of the Rooms grid, allows a site to search for a specific room using the Room Number, Description, Room Type, and/or Other search fields.

Functions	
Edit	Located on each room's row, this is the process by which a site may edit the respective room's details.
Actions	Allows the site user to affect the room's inventory in the following ways: • **Initialize**: Located on each room's row, this is the process by which a site adds an item to the database and assigns it to a room. (This is used when the item is pre-existing; do not use this for new items.) • **Room History**: Displays the inventory history of the respective room, including: Product Number, Product Name, Tag, Status, and Scan Date. • **Room Inventory Report**: Located on each room's row, this contains the inventory assigned to the respective room. This report is in PDF format and focuses on providing the details of Products in the room, the Qty, and Tag# for those products. Fields include: Product Number w/Barcode, Product Name, and other Product Details, as well as the Tag Numbers and any accessories assigned to the Product.

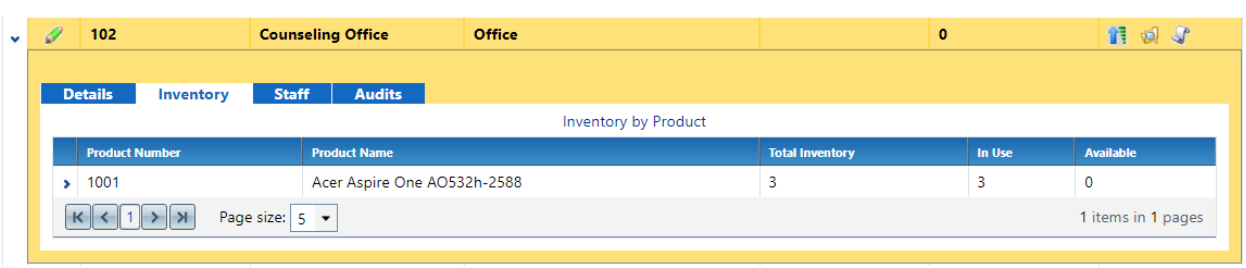
Room Details



The "Details" tab displays each room's detailed information as entered by the site.

Details	
Room Number	An alpha and/or numeric room number which corresponds with the site's floor plan (up to 13 alpha/numeric characters).
Description	The name of the room (e.g., Principal's Office, Library, Chemistry Lab, etc.).
Room Type	General categories designated by an Administrative user which are used to label different types of rooms within a site (e.g., Classroom, Computer Lab, Storage, etc.).
Other	An optional field which the site can use to track miscellaneous information regarding this room.
Notes	Displays any site created notes that may be helpful for the site.

Room Inventory

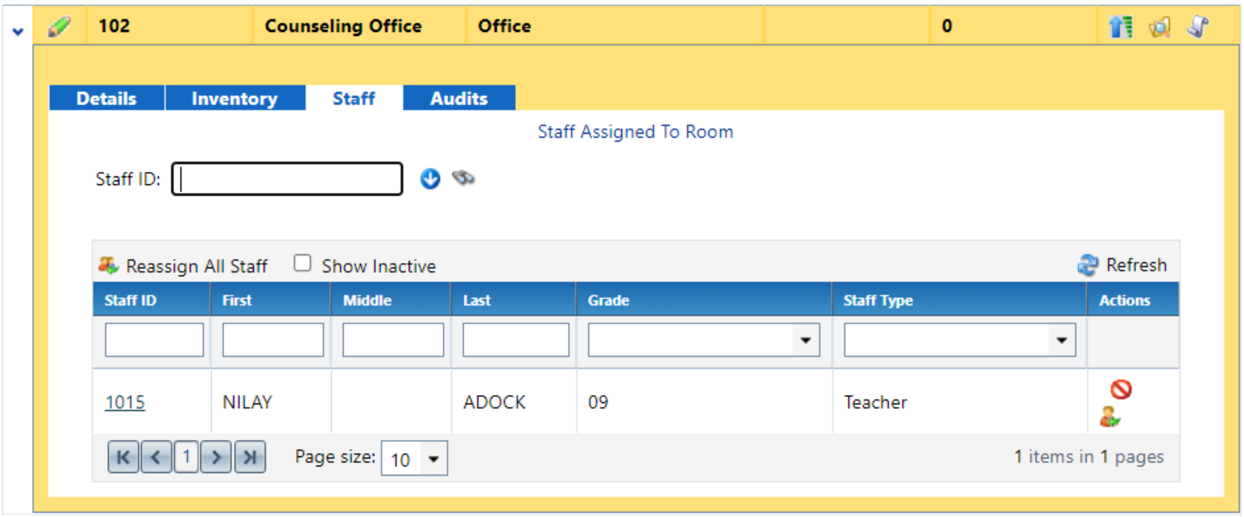


The "Inventory" tab displays each room's inventory counts for the site by product.

Details	
Product Number	An alpha and/or numeric room number which corresponds to the site's floor plan (up to 13 alpha/numeric characters).
Product Name	The name of the room (e.g., Principal's Office, Library, Chemistry Lab, etc.).
Total Inventory	General categories designated by an Administrative user which are used to label different types of rooms within a site (e.g., Classroom, Computer Lab, Storage, etc.).
In Use	An optional field which the site can use to track miscellaneous information regarding this room.
Available	Displays any site-created notes that may be helpful for the site.
Room to Room Transfer	Expanding the Product line item provides: • Asset Tag List: A list of the individual assets that match this product. • Room-to-Room Transfer: A link to allow the transfer of a tag from one room to another.

Room Staff

The "Staff" tab displays the staff assigned to the room, for homeroom association.

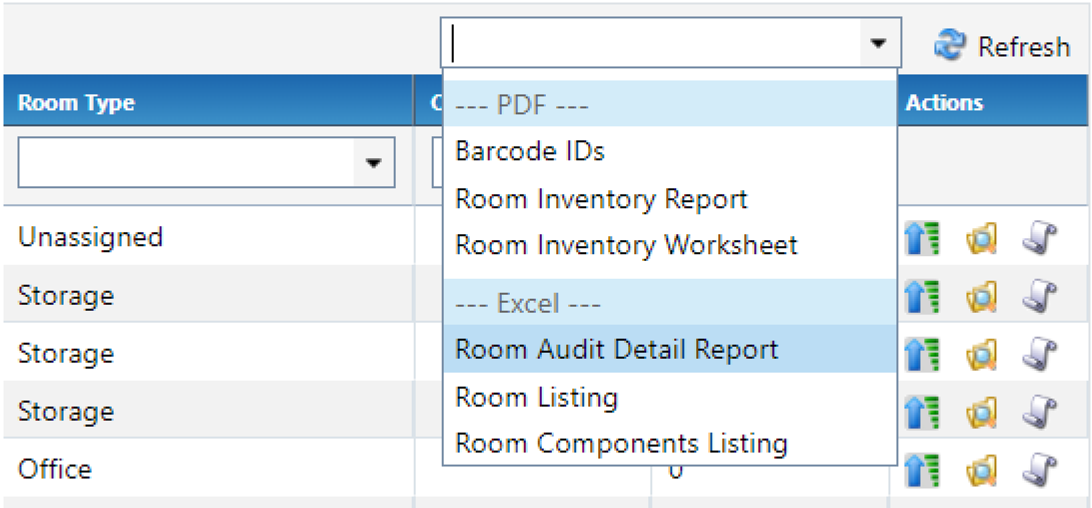


Details	
Staff ID Search Field	Located at the top of the "Staff" tab, allows a site to search for a specific staff member for homeroom association.
Reassign All Staff	Allows a user to search or enter in a room number to reassign all associated staff members to another room.
Show Inactive	When checked, allows a site to view staff members marked as inactive for the room.
Staff ID	An alpha and/or numeric identification number.
First	First name of staff member.

Details	
Middle	Middle name of staff member.
Last	Last name of staff member.
Grade	Grade level to which the staff member is associated.
Staff Type	General categories used to label different types of staff members within a site (e.g., Teacher, Technical Staff, Administrative Personnel, etc.).
Actions	Functions allowing the site user to affect the staff's room association. • **Remove Staff**: Removes the association of the staff member to the room. • **Reassign Staff**: Allows a user to search or enter in a room number to reassign the staff member to another room.

Rooms Reports

The "Rooms" grid provides multiple reports to be viewed/printed.



In the Rooms Report dropdown menu, results are returned for ALL ROOMS unless the Rooms Grid has been filtered for a subset of records.

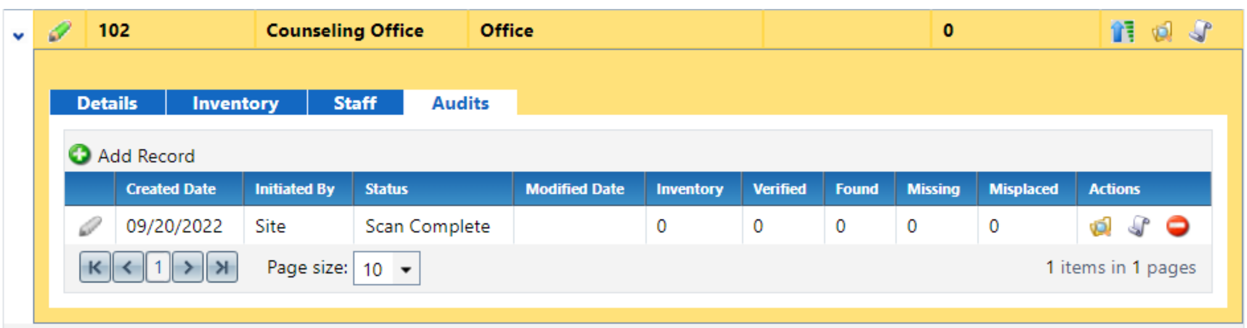
Report Dropdown Menu	
Barcode IDs	Provides, in PDF format, a listing of the rooms on a site and their respective barcodes.
Room Inventory Report	Provides, in PDF format, a listing of the Products in a room, including the Qty and Tag# for those products. Fields include: Product Number w/Barcode, Product Name, and other Product Details, as well as the Tag Numbers and any accessories assigned to the Product.
Room Inventory Worksheet	Provides, in PDF format, a listing of the items within each room and their respective details including Tag, Product Name, Model, Product Type, Serial, Price, and any information in the "Other" field.

Report Dropdown Menu	
Room Audit Detail Report	Provides, in CSV format, a listing of the tags and their last audit state from room audits (based on the filters applied to the Rooms grid and by the report filters).
Room Listing	Provides, in CSV format, a listing of the rooms on a site, including a room's Room Number, Room Description, Room Type, and any information stored in the "Other" field.
Room Components Listing	Provides, in CSV format, a listing of all parent and component tags for each room located on the site or for the rooms for which the rooms grid has been filtered.

Individual Record Reports	
Room Inventory Rpt	Located on each room's row, this contains the inventory assigned to the respective room. This report is in PDF format and focuses on providing the details of Products in the room, the Qty, and Tag# for those products. Fields include: Product Number w/Barcode, Product Name, and other Product Details, as well as the Tag Numbers and any accessories assigned to the Product.
Room Audit Summary Rpt	Located on the "Audits" tab under each room's record, each audit's row contains the respective room audit's details for THIS audit. Fields include: Room Name, Room Number, Room Type, Site

Individual Record Reports	
	Name, Date Printed, Audit Status, Last Modified Date, Last Modified By, Created Date, Created By, Finalized Date, Finalized By, Audit Inventory counts, Tag Number, Expected Location. Audit Location, and Action Taken.

Room Audits



The "Audits" tab displays each audit created for the respective room.
DO NOT PERFORM OR DELETE AUDITS FROM THE ROOMS SCREEN.

Details	
Add Record	Add an audit to this room. (Do not create an audit without consulting with Controllable Asset Management first.)
Edit	Located on each audit's row, this is the process by which a site may edit/add tags to the respective audit. (Closed Audits cannot be edited.) (Do not edit an audit without consulting with Controllable Asset Management first.)

Details	
Created Date	Displays the date the audit was created.
Initiated By	Shows if the audit was initiated by the Site or District.
Status	State of the audit (i.e., New, In Progress, Finalized, and Closed).
Modified Date	Displays the last date the audit was modified.
Inventory	Displays the inventory count of the tags located in the room.
Verified	Displays the inventory count of the tags which were verified in the room.
Found	Displays the inventory count of the tags that were expected to be in this room but were in another room.
Missing	Displays the inventory count of the tags which were not verified to be in the room.
Misplaced	Displays the inventory count of the tags which were in this room yet expected to be in another room.

Details	
Actions	Functions allowing the site user to affect the room's audit. • **Audit Details**: Allows functionality for Finalized audits to act on Missing and/or Misplaced tags while displaying the room audit's details, including: Audit Status, Last Modified Date, Last Modified By, Created Date, Created By, Finalized Date, Finalized By, Audit Inventory counts, detailed product information, Tag Number, and Tag details. (Site Administrators can ONLY take action on Finalized site-created audits.) • **Room Audit Summary Report**: Located on each audit's row, this contains the respective room audit's details for THIS audit, including: Room Name, Room Number, Room Type, Site Name, Date Printed, Audit Status, Last Modified Date, Last Modified By, Created Date, Created By, Finalized Date, Finalized By, Audit Inventory counts, Tag Number, Expected Location, Audit Location, and Action Taken. • **Delete**: Allows the respective audit to be deleted (audits in the status of Closed are exempt from this function). (Do not delete an audit without consulting with Controllable Asset Management first.)

Assign Staff to Multiple Homerooms

Staff members may instruct in several locations in a building. Staff members can be assigned to multiple homerooms using the "Staff" tab.

Note:

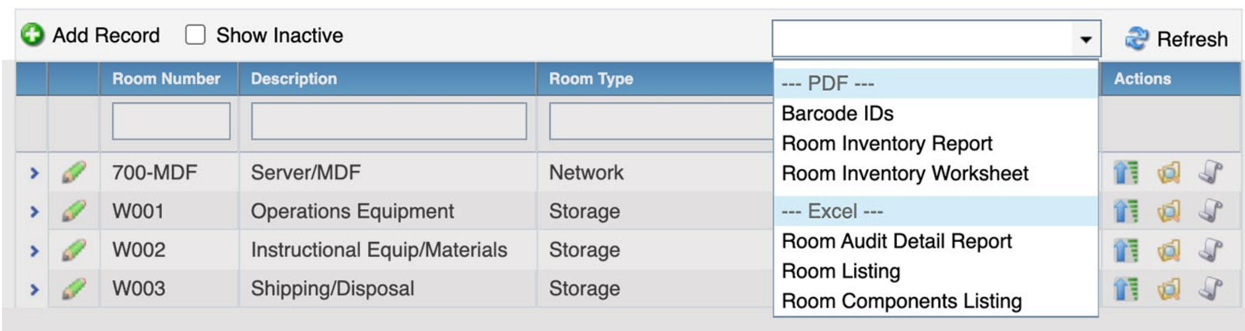
- When the staff member is assigned to a homeroom, the "Staff Assigned" column increases by 1.
- Staff members are removed or reassigned using the **Remove Staff** and **Reassign Staff** actions in the "Actions" column.

1. Click on **Rooms**, located in the top navigation bar.
2. Filter to find the respective room.
3. Click on the respective row to expand the grid.
4. Click the **Staff** tab.
5. Enter/scan the Staff ID in the **Staff ID** field or click **Search** to find and select the appropriate staff member.
    - If you enter/scan the number, click on **Next** to proceed to the next field. The staff member is added to the "Staff" grid.
    - If you **Search** for the staff member, the "Staff Room Assignment" window opens. Click **Select** in the respective staff member's row. The window refreshes and adds the staff member to the "Staff" grid.

Running Rooms Reports

"Rooms" are the physical locations within a site to which items are assigned.

The "Rooms" grid provides access to several preconfigured reports in PDF format, or as a CSV or XLSX extract that can be view and manipulated in a spreadsheet program such as Excel or Google Sheets. "Rooms" reports include all rooms located at the current site. To return a subset of data, the user must apply a filter to the records in the grid prior to running the report.



Barcode ID Report

Available in PDF format, this report provides "Room Numbers" and their respective barcodes in a format that can be printed to a sheet of labels using the Avery 5167 label format.

1. Click on **Rooms**, located in the top navigation bar.
2. Click the **Please Select Room Report** drop-down menu, located above the blue grid header.
3. Select **Barcode IDs** under the "--- PDF ---" menu subcategory. The "Barcode IDs" document opens within a PDF reader.

Room Inventory Report

The "Room Inventory Report" provides inventory counts and detailed information regarding the product(s) and their respective tags issued to each room. The report includes "Room Number"; "Room Name"; "Room Type"; "Site Name"; "Date Printed"; "Product Name"; "Product Number"; "Manufacturer"; "Model"; "Product Type"; "Area"; "Price"; "Other 1, 2, & 3"; "SKU"; "Projected Life"; "Tag Number"; "Qty"; and "Accessory" fields.

1. Click on Rooms, located in the top navigation bar.
2. (Optional) Filter the "Rooms" grid to select the respective rooms.
3. Click the **Please Select Room Report** drop-down menu, located above the blue grid header.
4. Select **Room Inventory Report** under the "--- PDF ---" menu subcategory. The "Room Inventory Report" opens within a PDF reader.

Room Inventory Worksheet

Available in PDF format, this report provides a listing of the items within each room and their respective details, including "Room Number," "Room Type," "Tag," "Product Name," "Model," "Product Type," "Other 1," "Serial," and "Price" fields.

1. Click on **Rooms**, located in the top navigation bar.
2. Click the **Please Select Room Report** drop-down menu, located above the blue grid header.
3. Select **Room Inventory Worksheet** under the "--- PDF ---" menu subcategory. The "Room Inventory Worksheet Setup" popup opens.
4. (Optional) Check the **Include Inventory Assigned to Staff in Room** check box.

Note: When selecting **Include Inventory Assigned to Staff in Room** the report will alter: the "Other #1" column will be replaced with the "Assigned To" column. The "Assigned To" column displays staff member(s) associated to the room inventory.

5. Click on **GO** to run the report. The "Room Inventory Worksheet" opens within a PDF reader.

Room Audit Detail Report

Available in CSV format, this report provides a listing of the tags and their last "Room" audit state, based on the filters applied to the "Rooms" grid and by the report filters ("Audit State" and/or "Audit Status"). It includes "Site ID," "Site Name," "Tag," "Serial Number," "Audit State," "Audit Scan Date," "Audit Scan By," "Audit Location," "Expected Location," "Room Type," "Audit Date," "Audit By," "Audit Status," "Action Taken," "Audit Notes," "Product Number," "Product

Name," "Model," "Manufacturer," "Catalog Type," "Inventory Status," "Tag Notes," "Order Number," "Funding Source," and "Purchase Price."

1. Click on **Rooms**, located in the top navigation bar.
2. Click the **Please Select Room Report** drop-down menu, located above the blue grid header.
3. Select **Room Audit Detail Report** under the "--- Excel ---" menu subcategory. The "Filter Report" window opens.
4. (Optional) Select audit filters from the **Audit State** and/or **Audit Status** drop-down menus.
5. Click on **GO**.
6. If prompted with "Do you want to open or save csv," click **Open**. The "Room Audit Detail Report" opens within your computer's spreadsheet program. If your browser does not prompt you to open the file, check your downloads folder.

Room Listing Report

Available in CSV format, this report provides a listing of the rooms on a site, including a room's "Room Number," "Room Description," "Room Type," "Room Other," and "Staff Assigned Count" fields.

1. Click on Rooms, located in the top navigation bar.
2. Click the **Please Select Room Report** drop-down menu, located above the blue grid header.
3. Select **Room Listing** under the "--- Excel ---" menu subcategory. The "Filter Report" window opens.
4. If prompted with "Do you want to open or save csv," click **Open**. The "Rooms Report" opens within your computer's spreadsheet program. If your browser does not prompt to open the file, check your downloads folder.

Room Components Listing

Available in CSV format, this report provides a current listing of all component tags and parent tags at a site. This report does not require the filtering of the "Rooms" grid. The report includes "Parent Tag"; "Asset Type"; "Tag"; "Serial"; "Product Number"; "Product Name"; "Manufacturer"; "Model"; "Product Type" "Other 1, 2, & 3"; "Suggested Price"; "Room Number"; "Room Description"; "Room Type"; "Status"; "Asset UID"; "MDM Field Data"; "Custom Field Data"; "Tag Notes"; "Source"; "Order Number"; "Vendor"; "Funding Source"; "Account Code"; "Purchase Price"; "Purchase Date"; "Projected Life"; "Expiration Date"; "Last Scan Date"; and "Last Scan By" fields.

1. Click on **Rooms**, located in the top navigation bar.
2. Click the **Please Select Room Report** drop-down menu, located above the blue grid header.
3. Select **Room Components Listing** under the "--- Excel ---" menu subcategory. The "Filter Report" window opens.
4. If prompted with "Do you want to open or save "RoomComponentsListing.csv," click **Open**. The "Room Components Listing" opens within your computer's spreadsheet program. If your browser does not prompt to open the file, check your downloads folder.

View an Individual Room's Inventory Report

Available in PDF format, this report provides detailed product information, respective tags, and inventory quantities per room.

1. Click on **Rooms**, located in the top navigation bar.
2. Filter the "Rooms" grid to locate the respective room.
3. Click on **Room Inventory Report**, located on the respective room's row under the "Actions" column. The report launches as a PDF.
4. (Optional) Click on the PDF reader's print icon, review the print window, and click **OK**.
5. Click on **Close** to close the "Room Inventory Report" window.

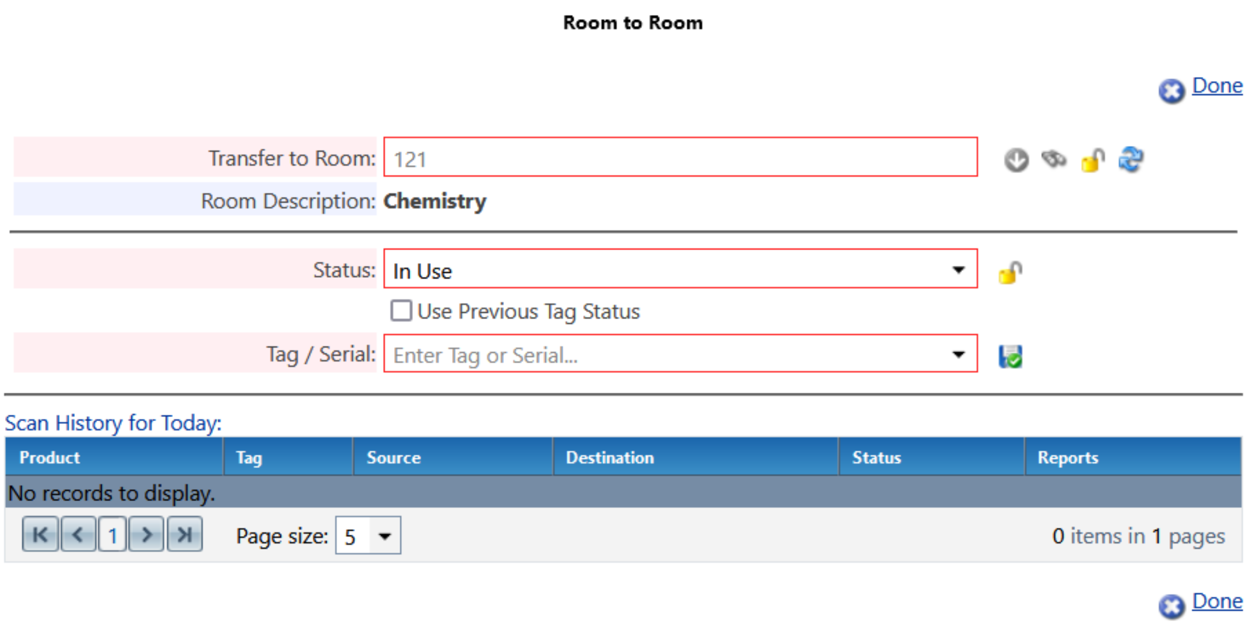
View an Individual Room's Audit Summary Report

Available in PDF format, this report provides a listing of the tags and their respective audit states within the room audit. The report includes "Room Number," "Room Name," "Room Type," "Site Name," "Date Printed," "Status," "Created By," "Created Date," "Last Modified By," "Last Modified Date," "Initiated By," "Approved By," "Approved Date," "Scan Completed By," "Scan Completed Date," "Audit Inventory Quantity," "Verified Quantity," "Found Quantity," "Missing Quantity," "Misplaced Quantity," "State," "Product," "Tag," "Asset Type," "Expected Location," "Audit Location," and "Action Taken" (sorted by "Audit Tag State").

1. Click on **Rooms**, located in the top navigation bar.
2. Filter the "Rooms" grid to locate the respective room.
3. Click on the respective room's row to display all tabs.
4. Click on the **Audits** tab.
5. Click on **Room Audit Summary Report**, located on the respective audit's row under the "Actions" column. The report launches as a PDF.
6. (Optional) Click on the PDF reader's print icon, review the print window, and click **OK**.
7. Click on **Close** to close the "Room Audit Summary Report" window.

Room-to-Room Transfers

Asset Management allows items to be moved from room to room within a site through a process called "Room-to-Room Transfers." Assets located at another site or issued to a student or staff member cannot be transferred through this process but must be transferred using a "Site-to-Site Transfer" or collected to a room using the "Quick Collect" process.Click on **Room to Room**, located in the "Site Tools Quick Links" menu. The "Room to Room" window opens.



2. Enter/scan the **Room Number** where the item will be moved. If you manually enter the number, click on **Next** or press the **Enter** key on your keyboard to proceed to the next field. OR, click on **Search** to find and select the appropriate "Room."
3. If multiple tags are being moved to the same room, select the **Lock** icon on the respective field(s). This allows you to scan tag numbers without entering redundant information for each tag.
4. Select the status of the item being moved using the **Status** drop-down menu.
5. (Optional) Click on **Lock/Unlock** to lock the status.
6. Enter/scan the tag number into the **Tag** field. If you manually enter the number, click on **Save** to add this item to the selected room.

7. Continue to scan or enter tag numbers until all items have been moved to the selected room. If desired, you can unlock and change the **Room** field and/or change the **Status** field before entering another tag. Unless changed, those fields retain the original settings from steps 2 and 3.

8. Click on **Done** to close the "Room to Room" window.

Note:

- If the tag(s) added to the "Room-to-Room Transfer" are an "Asset Type" of "Component" or "Parent," an additional warning screen will display to verify the transaction.

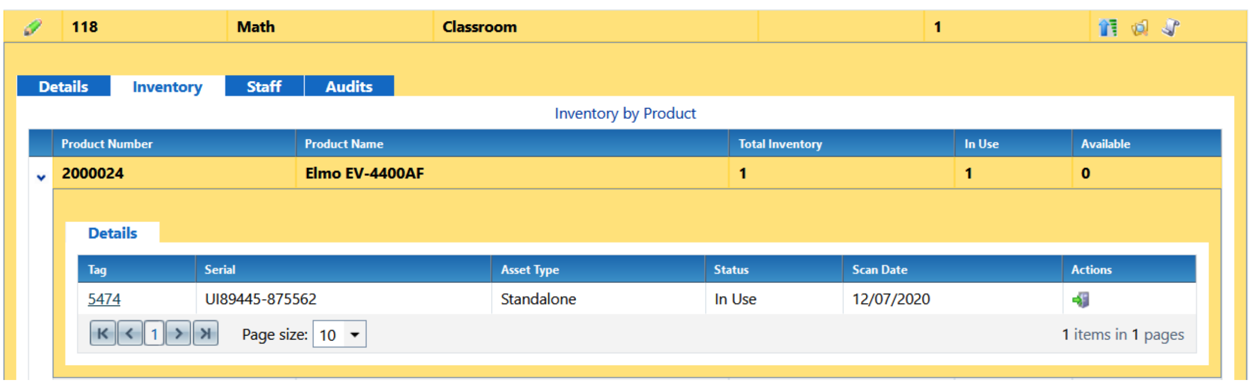
If the tag searched for is not found, located at another site, or issued to a person, a message will be displayed.

Room-to-Room Transfer – Room Inventory Details

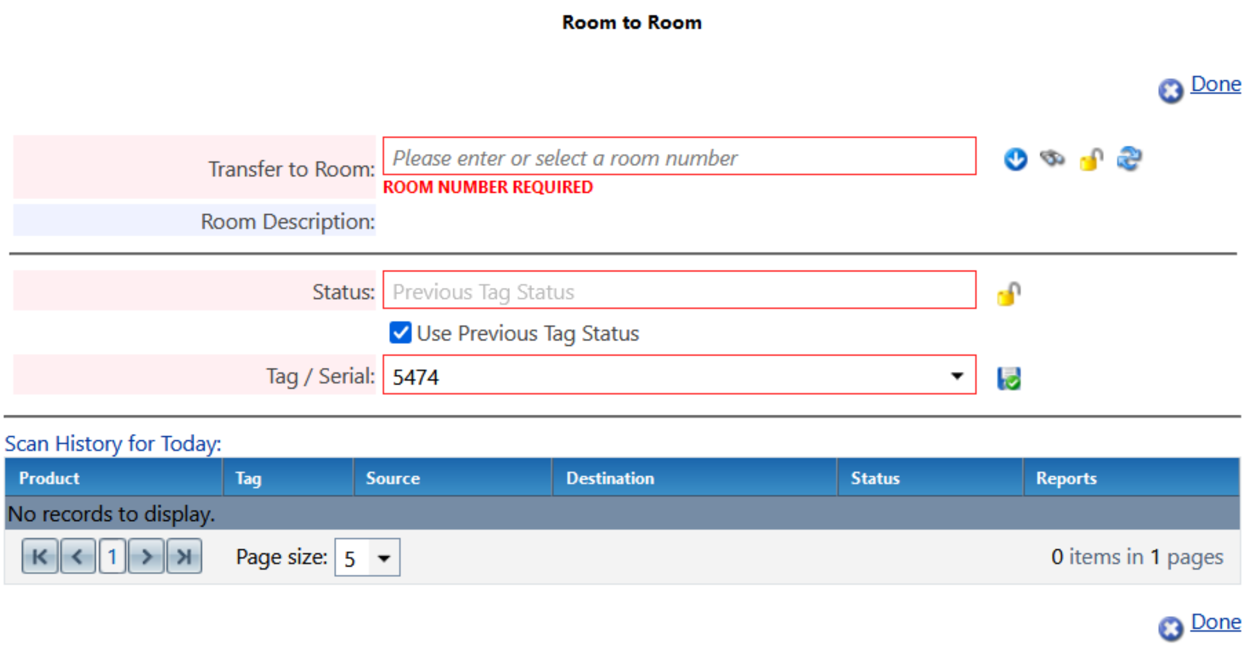
Users can view all tags within a room and conduct a "Room-to-Room Transfer" from the individual "Room Inventory Details" grid.

A site user must have permission to perform a room-to-room transfer. Permissions are established by the "Administrative Administrator."

1. Click on **Rooms**, located in the top navigation bar.
2. Filter to find the respective room where the tag currently resides.
3. Click on the respective row to expand the grid.
4. Click the **Inventory** tab.
5. Click on the respective product row to expand the grid. The **Product Details** tab displays.



6. Under "Actions," select **Room to Room Transfer**. The "Room to Room" window opens.



7. The "Tag Number" automatically populates, and the **Use Previous Status** option is enabled by default. To select a new tag status, deselect **Use Previous Status**; select new tag status from the **Status** drop-down menu.

8. Enter the room number in the **Transfer to Room** field or **Search** for the respective room.

9. Click on **Save**.

10. Click on **Done** to close the "Room to Room" window. The "Rooms" grid refreshes with an updated list of tags in the room.

Add or Edit a Room

The "Rooms" grid displays the physical location within a site to which an item is assigned. Each site in the district will define a room for every physical location within the site that might have inventory assigned to it. Rooms can also be associated with a "Staff" member to allow a staff member to be responsible for the inventory in their assigned room(s).

Room Name Convention:

(Barcode Number from Asset Tag on edge of door) (Physical Room Number)

Example: 754832 105F

Room Description Convention:

(Physical Room Number) (Descriptive information such as the room's function or unique location.)

Example: 105F Nurse Office

Add a Room

1. Click on **Rooms**, located in the top navigation bar.
2. Click on **Add Record**.
3. Enter the **Room Number** and **Description** in the respective fields.
4. Enter additional information about the room in the remaining fields, if desired. Red fields are required. It is best practice to associate a "Room Type" with every room.
5. Click on **Add**.

Edit a Room

1. Click on **Rooms**, located in the top navigation bar.
2. Click on **Edit** in the respective room type's row.
3. Edit the room details.

4. Select/deselect the check box next to **Active** to activate/deactivate the room.

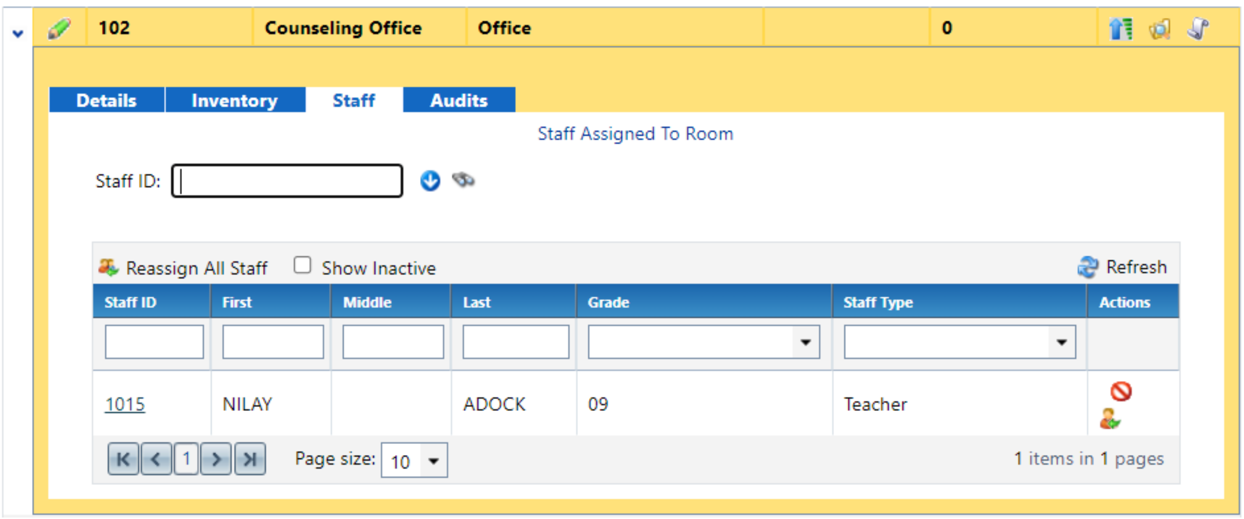
5. Click on **Update**.

Associate a Staff Member to a Room

1. Click on **Rooms**, located in the top navigation bar.

2. Find the desired room and click to expand the record.

3. Click the **Staff** tab.



4. Enter the **Staff ID** or click **Search** to find the desired staff member.

The staff member is associated to the room and can now be reassigned to another room or removed from the room at any time.

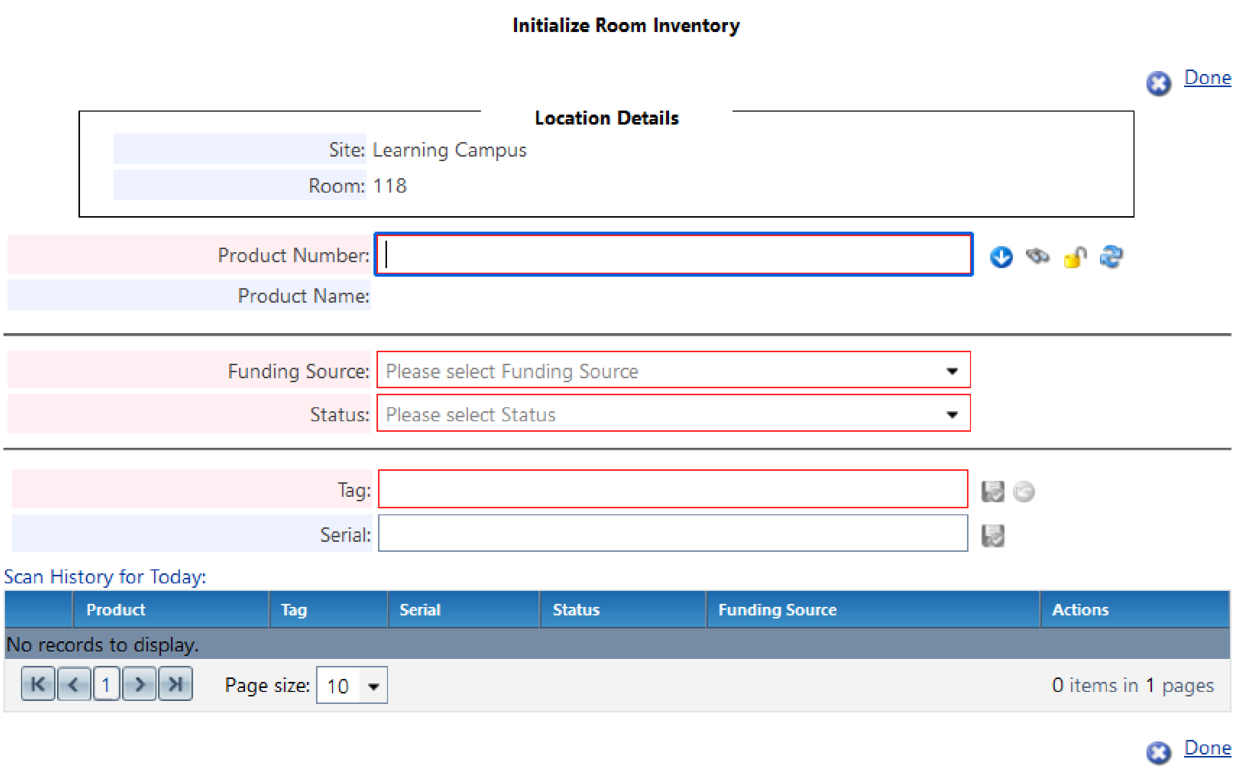
Adding Assets via Room Initialization

"Initialize Room Inventory" is a process by which a district can add existing assets to Asset Management. Although it is best practice to add assets via the recording of a purchase order, there are circumstances in which "Room Initialization" is an effective alternative. For example, an asset may have been missed during the data conversion process, or someone might donate an asset to the district. This process will always start in "Site View," at the "Site" and in the "Room" where the asset currently resides.

Initialize Items to a Room

The following steps require tags for each item initialized.

1. Click on **Rooms**, located in the top navigation bar.
2. Filter for the room for which you wish to initialize products.
3. Click on **Initialize Room Inventory**, located in the room's respective row. The "Initialize Room Inventory" window opens.



4. Locate the product in the printed product catalog and scan the "Product Number" barcode into the **Product Number** field, or use **Search** to select the desired product.
5. Select the **Funding Source** for the item you are initializing using the drop-down menu.
6. Select the Status of the item:
    - **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 not available to issue to another room, staff, or student.
7. Locate the item's tag and enter/scan it into the **Tag**
8. If a serial number is required, enter/scan the serial number of this item into the **Serial** field.
9. Once successfully initialized, the item appears in the "Scan History for Today" grid.
10. Click **Done** to close the "Initialize Room Inventory" window.

Unlock Product Number

If you wish to initialize different products to the same room without leaving the "Initialize Room Inventory" window, you will need to unlock the "Product Number" field when you are ready to start scanning tags for a different product.

1. The "Product Number" field retains the last product number selected. Click on **Locked**, located to the right of the "Product Number" field. This will unlock the "Product Number" field and the icon will change to **Unlocked**.
2. Click **Search** to search the "Catalog." If you have a printed product catalog, locate the next "Product Number" barcode and scan the barcode into the unlocked **Product Number** field. The **Product Number** field will become locked again. This allows you to initialize multiples of this product with just one scan of the product number.

3. Click **SELECT** to select the desired product from the "Catalog."
4. Continue adding the **Funding Source**, **Status**, **Tag**, and **Serial** fields for the assets in this room that match the "Product Number."

Note:

- "Tags" are the unique identifiers used to track items within Asset Management. Tags are affixed to each item you wish to track. Reach out to the Controllable Asset Management Department for asset tags.

Staff

Running Staff Reports

"Staff" are the employees who may have an issued item within a site. There are several helpful reports available in the "Staff" grid. If you filter the "Staff" grid before selecting a staff report, the report will display only the filtered information.

Barcode IDs Report

This report, in PDF format, provides "Staff ID," "First Name," "Middle Name," "Last Name," and a respective barcode based on the staff member's ID number.

1. Click on **Staff**, located in the top navigation bar.
2. Click on **Please Select Staff Report** drop-down menu, located above the blue grid header.
3. Select **Barcode IDs** under the "--- PDF ---" menu subcategory. The "Barcode IDs" report opens.

Accessory Listing Report

This report, in CSV format, provides detailed information for accessories issued to staff members. This report includes "Staff ID," "Last Name," "First Name," "Middle Name," "Grade," "Homeroom," "Staff Type," "Status," "Tag," "Product Name," "Accessory Name," "Issued Date," "Quantity Issued," "Quantity Missing," and "Missing Value."

1. Click on **Staff**, located in the top navigation bar.
2. Click on **Please Select Staff Report** drop-down menu, located above the blue grid header.
3. Select **Accessory Listing** under the "--- Excel ---" menu subcategory.
4. If prompted "Do you want to open or save “StaffAccessoryListing.csv," click on **Open**. The "Accessory Listing" report opens within Microsoft Excel.

Charge Listing Report

This report, in CSV format, provides a list of respective charges (satisfied or unsatisfied) for staff members at a respective site. This report includes "Staff ID," "First Name," "Middle Name," "Last Name," "Staff Type," "Status," "Grade," "Homeroom," "Product," "Tag," "Charge Type," "Description," "Charge Notes," "Issue Date," "Site Name," "Charge Amount," "Amount Paid" (all respective payments), "Amount Due," and "Satisfied Date."

1. Click on **Staff**, located in the top navigation bar.
2. Click on **Please Select Staff Report** drop-down menu, located above the blue grid header.
3. Select **Charge Listing** under the "--- Excel ---" menu subcategory. The "Filter Report" window opens.
4. (Optional) Filter charges using the **Charge Type** and **Charge Issued** drop-down menus.
5. Click on GO **GO**.
6. If prompted "Do you want to open or save “StaffChargeListing.csv," click on **Open**. The "Charge Listing" report opens within Microsoft Excel.

Inventory Due Date Listing Report

This report, in CSV format, provides a list of staff members with overdue items. This report includes "Staff ID," "First Name," "Middle Name," "Last Name," "Staff Type," "Status," "Grade," "Homeroom," "Phone," "E-mail," "Product Name," "Tag," "Due Date," and "Past Due."

1. Click on **Staff**, located in the top navigation bar.
2. Click on **Please Select Staff Report** drop-down menu, located above the blue grid header.
3. Select **Inventory Due Date Listing** under the "--- Excel ---" menu subcategory.
4. If prompted "Do you want to open or save “InventoryDueDateListing.csv," click on **Open**. The "Staff Inventory Due Date Listing" report opens within Microsoft Excel.

Staff Listing Report

This report, in CSV format, provides a list of the staff members and includes "Staff ID," "First Name," "Middle Name," "Last Name," "Grade," "Homeroom," "Staff Type," "Status," and "Current Site."

1. Click on **Staff**, located in the top navigation bar.
2. Click on **Please Select Staff Report** drop-down menu, located above the blue grid header.
3. Select **Staff Listing** under the "--- Excel --- menu subcategory.
4. If prompted "Do you want to open or save "Staff.csv," click on **Open**. The "Staff Listing" report opens within Microsoft Excel.

Charge Activity Listing Report

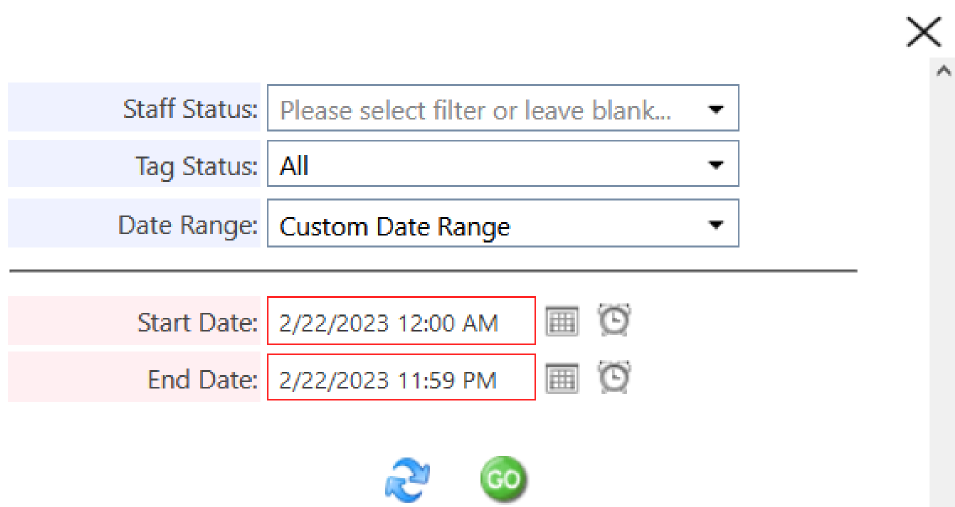
This report, in CSV format, provides charge activity details for respective staff members within a site. This report includes "Staff ID," "Last Name," "First Name," "Middle Name," "Staff Type," "Status," "Grade," "Homeroom," "Product," "Tag," "Charge Type," "Description," "Charge Notes," "Issue Date," "Site Name," "Charge Amount," "Activity Date," "Activity Type," "Activity Amount," "Activity Notes," "Activity Recorded By," and "Satisfied Date."

1. Click on **Staff**, located in the top navigation bar.
2. Click on **Please Select Staff Report** drop-down menu, located above the blue grid header.
3. Select **Charge Activity Listing** under the "--- Excel ---" menu subcategory.
4. If prompted "Do you want to open or save "StaffChargeActivityListing.csv," click on **Open**. The "Charge Activity Listing" report opens within Microsoft Excel.

Staff Inventory Status Report

This report, in CSV format, provides a detailed list of items issued to staff members. This report includes "Site Name," "Staff ID," "Last Name," "First Name," "Middle Name," "Grade," "Home Room," "Staff Type," "Staff Status," "Product, Model," "Product Type," "Suggested Price," "Tag," "Serial," "Asset Type," "Parent Tag," "Tag Status," "Status ID," "Scan Date," and "Status Notes."

1. Click on **Staff**, located in the top navigation bar.
2. Click on **Please Select Staff Report** drop-down menu, located above the blue grid header.
3. Select **Staff Inventory Status** under the "--- Excel ---" menu subcategory. The "Filter Report" window opens.
4. (Optional) Filter the status using the **Staff Status**, **Tag Status**, and **Date Range** drop-down menus.
5. Choosing **Custom Date Range** opens additional fields.
    1. Click on **Open the calendar popup** to select the "Start Date."
    2. Click on **Open the time view popup** to select the start time.
    3. Click on **Open the calendar popup** to select the "End Date."
    4. Click on **Open the time view popup** to select the ending time



6. Click on **GO**.
7. If prompted "Do you want to open or save “StaffInventoryStatus.csv," click on **Open**. The "Staff Inventory Status" report opens within Microsoft Excel.

Sent Staff Receipts Report

This report, in CSV format, provides a list of receipts sent to staff. This report includes "Site ID," "Site Name," "Location Type," "ID," "Last Name," "First Name," "Middle Name," "Staff Type," "Grade," "Homeroom," "Receipt Type," "Signed Receipt," "E-Mail Date," and "E-Mail."

1. Click on **Staff**, located in the top navigation bar.
2. Click the **Please Select Staff Report** drop-down menu, located above the blue grid header.
3. Select **Sent Staff Receipts** under the "--- Excel ---" menu subcategory. The "Sent Staff Receipts Report" window opens.
4. Select the **Sent Receipt Date Range** from the drop-down menu.
5. Select the **Sent Receipt Type** from the drop-down menu.
6. Click on **GO**.
7. If prompted "Do you want to open or save "SentStaffReceiptsReport.csv," click on **Open**. The "Sent Staff Receipts Report" opens within Microsoft Excel.
8. Click on **Close** to close the "Sent Staff Receipts Report" window.

Manage Staff Records

Staff records are most often brought into the Asset Management system via integration with the district's student information or HR system. This nightly integration helps keep staff records up to date and is considered best practice for populating staff records.

Add a Staff Record

Adding staff members manually is possible. Best practice is to use the ID number produced by your student management system when manually adding. This allows the data import to update the record you added and does not create a second account for the same staff member.

1. Click on **Staff**, located in the top navigation bar.
2. Click on **Add Record**. The grid expands and displays "Staff Member: New Staff Member."
3. Enter the staff member's details. Red fields are required information.
4. Click on **Add**.

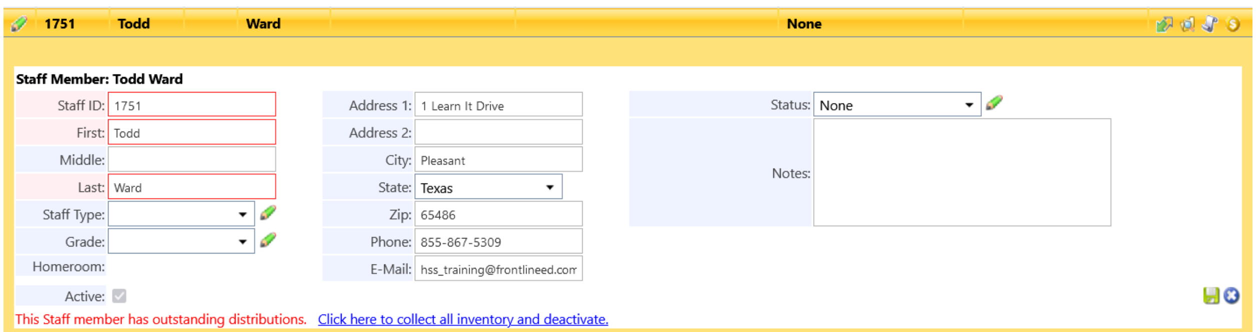
Edit a Staff Record

1. Click on **Staff**, located in the top navigation bar.
2. Locate the record of the staff member you wish to edit.
3. Click on **Edit** to the left of the staff member's name. The grid expands.
4. Edit the staff member's details. Red fields are required information.
5. Click on **Update**.

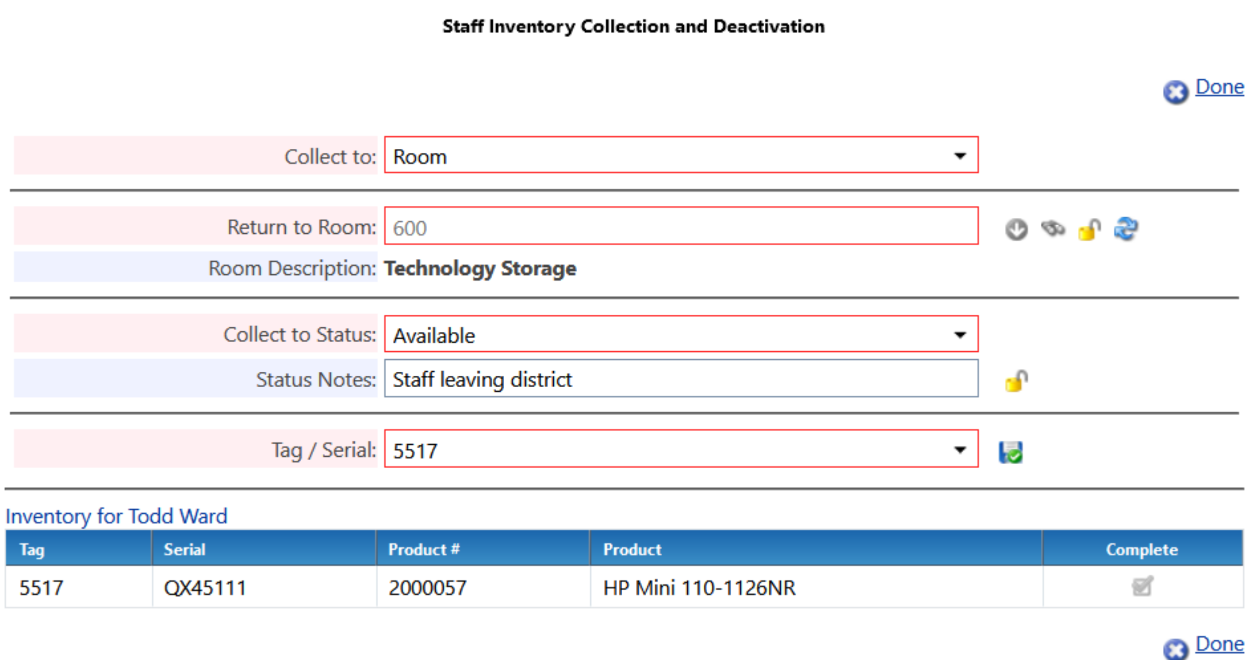
Staff Deactivation Process – Collect to a Room

This process allows a site administrator to collect an "In Use" item from a staff member who is leaving the site and/or district while deactivating the staff record. If the staff member has any outstanding charges on their account, the account cannot be deactivated. Tags with restricted funding sources must be collected prior to a staff deactivation.

1. Click on **Staff**, located in the top navigation bar.
2. Filter for the respective staff member.
3. Click on **Edit** in the respective staff member's row. The staff information grid expands.
4. The message "This Staff member has outstanding distributions" displays in red at the bottom of the grid.

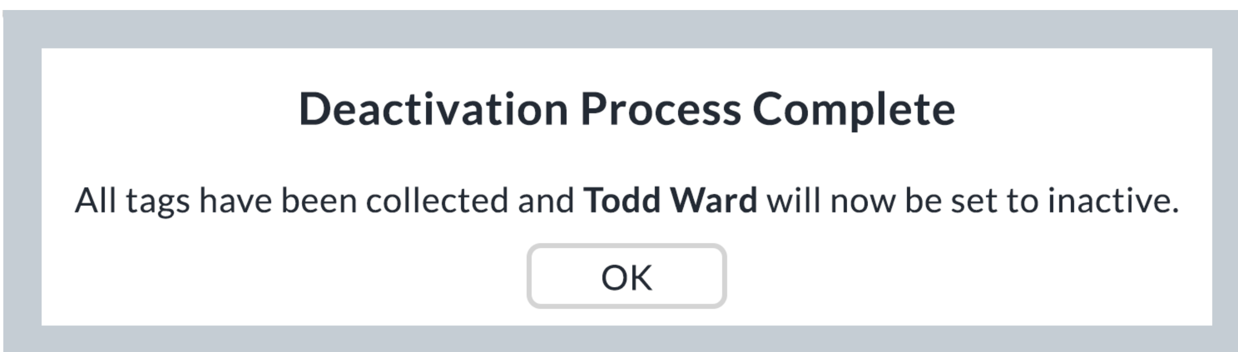


5. Click on the link **Click here to collect all inventory and deactivate**. The "Staff Inventory Collection and Deactivation" window opens.



6. Select **Room** from the "Collect to" drop-down menu.

7. Enter the room number where the tag will reside in the **Return to Room** field and click on **Next**, OR click on **Search** and select the respective room.
8. Select the status from the **Collect to Status** drop-down menu.
9. (Optional) Enter notes in the **Status Notes** field. Click on **Lock/Unlock** to secure.
10. Enter/scan the tag number in the **Tag** field.
11. Click on Save.
12. If there are accessories assigned to the tag, they will display. Edit the collected accessory quantity for any missing accessories.
13. To collect the tag and respective accessories, click on **Collect Accessories**. The "Deactivation Process Complete" window opens.
14. The following message displays: "All tags have been collected and (name of Staff) will now be set to inactive."



15. Click **OK**. The screen returns to the "Staff" grid.

Note: If a staff member has transferred and still shows items assigned to them form previous campus, notify Controllable Asset Management to transfer the items and inactivate the staff member.

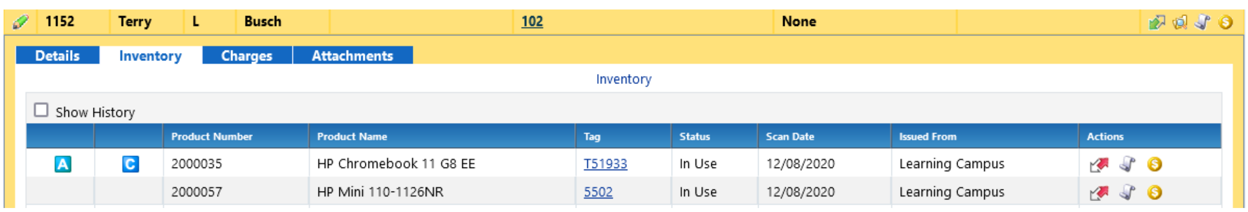
Collect Items from Staff

This process allows a site to collect an item in the status of "In Use" from a staff member to a room or transfer.

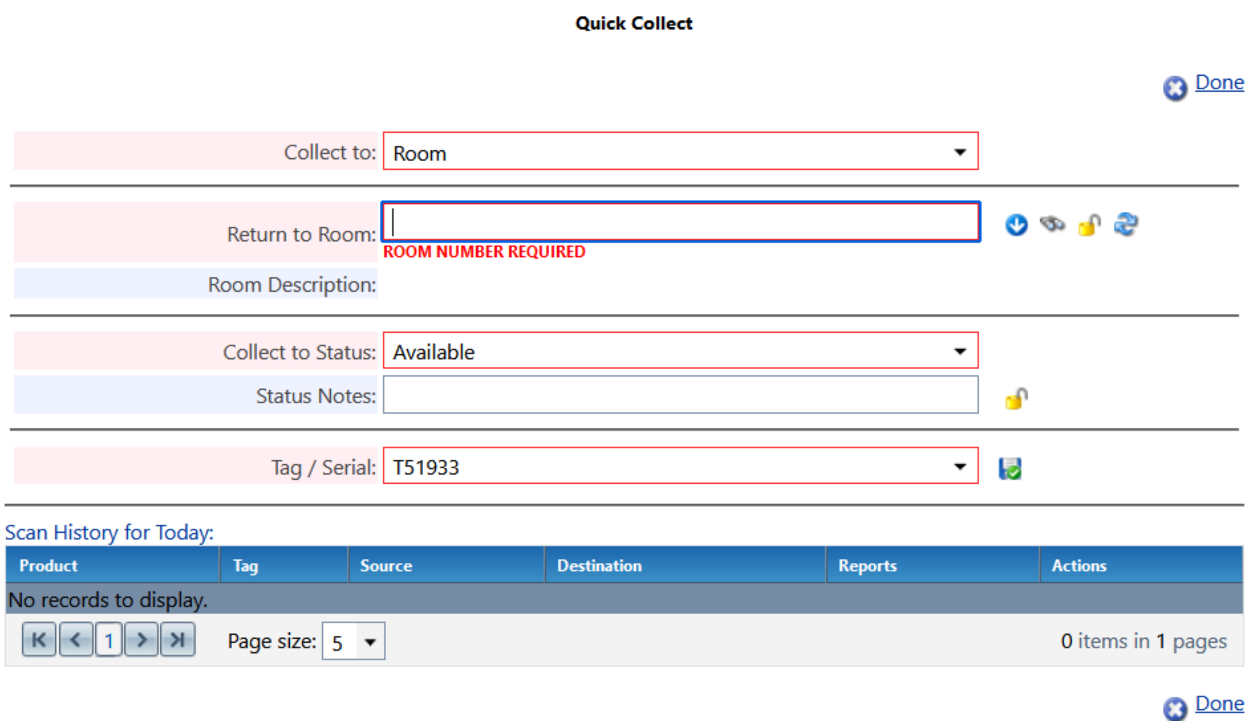
> **Note:** To locate the tag's originating source before or after you have collected the item from the staff member, perform a "Tag Search" for the respective tag number and check the **Status History** tab.

Collect from Staff Account to a Room

1. Click on **Staff**, located in the top navigation bar.
2. Filter for the respective staff member. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.



3. Within the **Inventory** tab, locate the item to be collected and click on **Quick Collect** under the "Actions" column. The "Quick Collect" window opens.
   - Fields will auto-populate with tag information.
   - The "Collect To" field defaults to "Room."



4. Enter/verify the room number collecting the tag in the **Return to Room** field.
   - To edit the room, click the **Lock/Unlock** to unlock the field.
   - Click on **Search** and select the respective **room**.
5. Select the tag status from the **Collect to Status** drop-down menu
6. (Optional) Enter notes in the **Status Notes field**. Click on **Lock/Unlock** to secure.
7. Verify the tag number in the "Tag" field.
8. Click on **Save**.
   - If there are accessories to be collected for this tag, they will display in the "Collect Accessories" grid. Edit the **Collected Quantity** for the respective accessory.
9. To collect the tag and respective accessories, click on **Collect Accessories**.
10. To generate a "Collection Receipt" and capture a digital signature, select the **Full Collection Receipt** from the "Reports…" drop-down menu

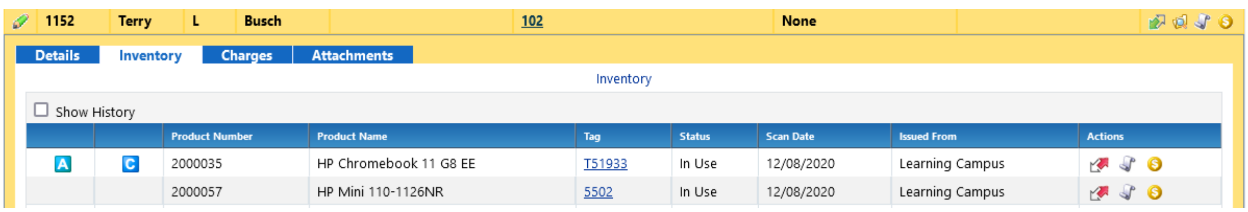
11. To assess a charge to associated to the collected tag and staff member account, click on **Assess Charge**, located under the "Actions" column in the "Scan History for Today" grid.

12. Click on **Done** to close the "Quick Collect" window.

Collect from Staff Account to a Transfer

Only to be used to add to an existing transfer and the item is being disposed of.

1. Click on **Staff**, located in the top navigation bar.
2. Filter for the respective staff member. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.



1152 Terry L Busch 102 None

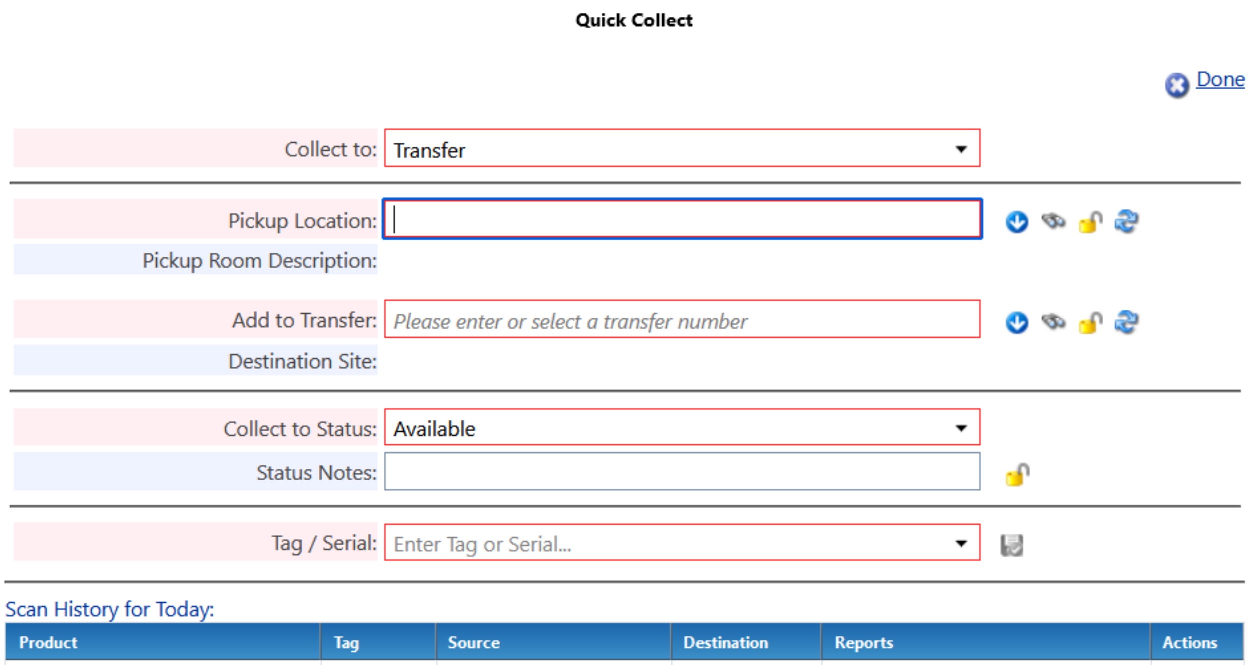
Details Inventory Charges Attachments

Inventory

Show History

		Product Number	Product Name	Tag	Status	Scan Date	Issued From	Actions
A	C	2000035	HP Chromebook 11 G8 EE	T51933	In Use	12/08/2020	Learning Campus	
		2000057	HP Mini 110-1126NR	5502	In Use	12/08/2020	Learning Campus	

3. Within the Inventory tab, locate the item to be collected and click on **Quick Collect** under the "Actions" column. The "Quick Collect" window opens.
    - Fields will auto-populate with tag information.



4. Select **Transfer** from the "Collect To" drop-down menu.
5. Enter/verify the room number collecting the tag in the **Pickup Location** field.
   - To edit the location, click **Lock/Unlock** to unlock the field.
   - Click on **Search** and select the respective **room**.
6. Click on **Search** next to the "Add to Transfer" field.
   - If the transfer does not exist, select a destination from the **Destination** drop-down menu located in the "Create a New Transfer" area. Click on **GO**.
   - To use an existing transfer, select the transfer from the "Search for an Existing Transfer" grid.
7. Select the tag status from the **Collect to Status** drop-down menu.
8. (Optional) Enter notes in the **Status Notes** field. Click on **Lock/Unlock** to secure.
9. Verify the tag number in the "Tag" field.
10. Click on **Save**.

- If there are accessories to be collected for this tag, they will display in the "Collect Accessories" grid. Edit the **Collected Quantity** for the respective accessory.

11. To collect the tag and respective accessories, click on **Collect Accessories**.
12. To generate a "Collection Receipt" and capture a digital signature, select the **Full Collection Receipt** from the "Reports…" dropdown menu
13. To assess a charge to associated to the collected tag and staff member account, click on **Assess Charge**, located under the "Actions" column in the "Scan History for Today" grid.
14. Click on **Done** to close the "Quick Collect" window.

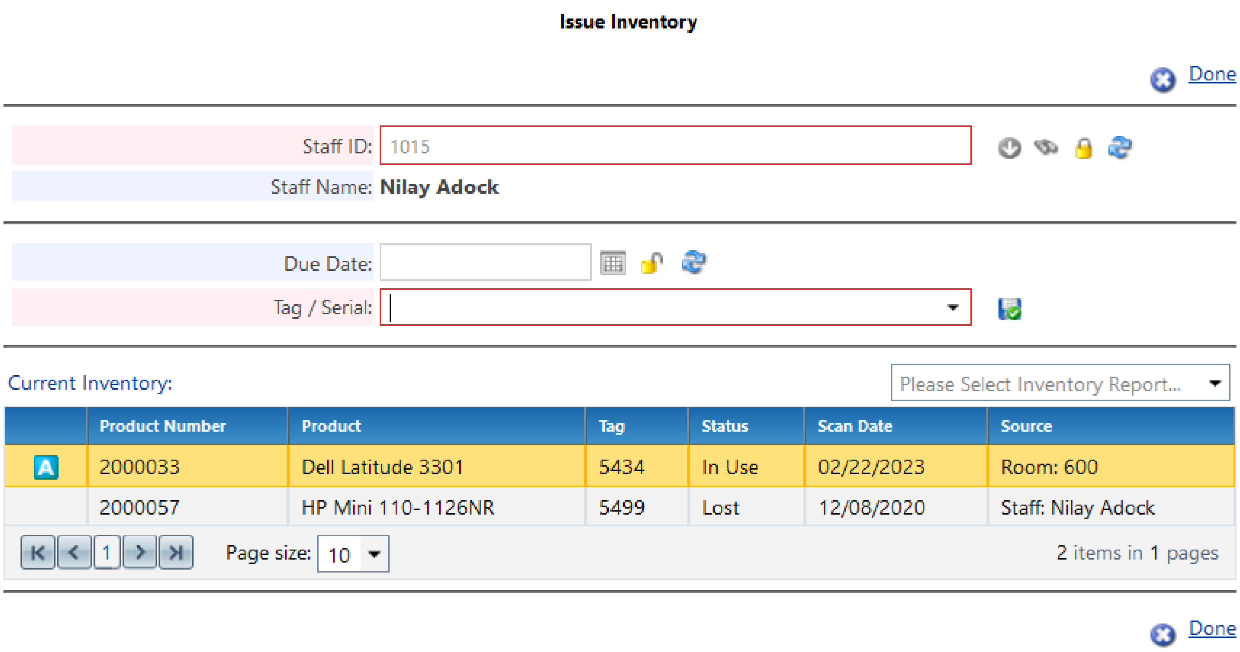
Issue Item to Staff Account

Staff are the employees within a site to which an item is issued. Staff records are most often brought into the Asset Management system via an integration with the district's student information system or an HR system.

Staff are considered a type of location, not a user.

Issue Item from Staff Account

1. On the top navigation bar, click **Staff**.
2. Filter the Staff grid to locate the respective staff member.
3. In the respective staff member's row, click **Issue Inventory to Staff** under the Actions column. The Issue Inventory window opens.



4. If desired, utilize the **Calendar** tool to choose a **Due Date**.
5. Enter/scan the tag number in the **Tag** field.
6. Click on **Save**. The tag is added to the Current Inventory grid at the bottom of the Issue Inventory window.

7. If there are accessories issued with this asset, they will be indicated with the **Accessory** icon to the left of the asset. Floating above the icon will cause a popup window to show the included accessories. Clicking on the icon will allow the user to change the quantity of each accessory if needed.
8. To collect a digital signature and generate a "Distribution Receipt," click on **Please Select Inventory Report** drop-down menu.
9. Select the desired receipt under the PDF menu subcategory. The receipt displays all items issued to this staff member from the staff member's home site and acquired sites.
    1. **Full Transaction Receipt** displays each item that has been issued to this staff member.
    2. **Full Distribution Receipt** displays each item plus the verbiage created in the Report Settings by an administrator.
    3. **Today's Transaction Receipt** only displays the items which have been issued or collected today.
10. Click on **Done** to close the Receipt window
11. Click on **Done** to close the Issue Inventory window

Note: If the tag(s) issued to the staff member are an Asset Type of Component or Parent, an additional warning screen will display to verify the transaction.

Assess Staff Charges

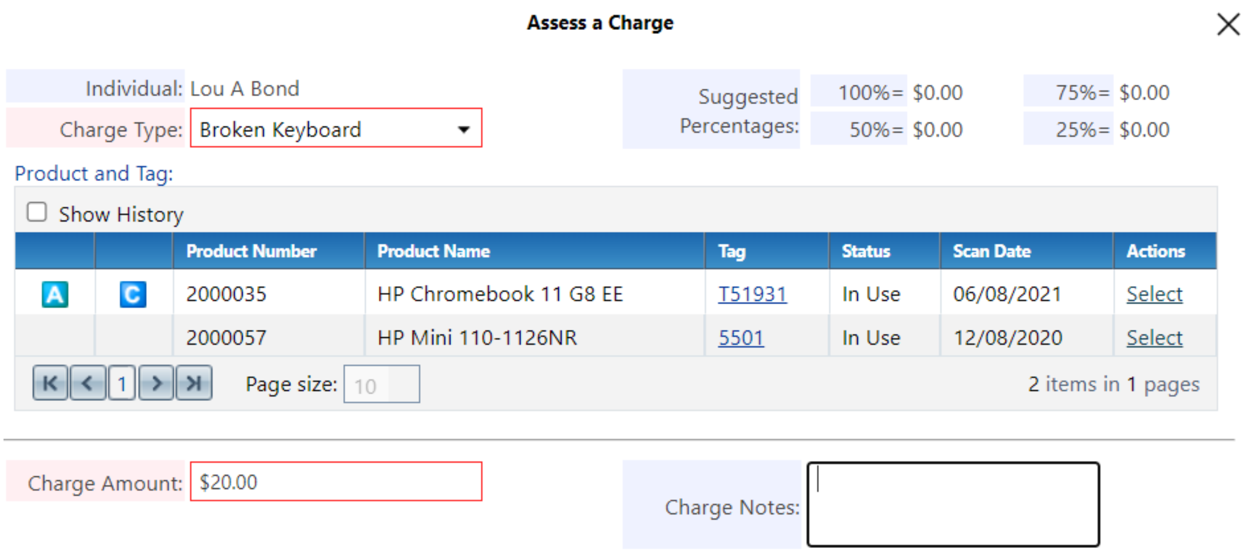
Charges are assessed when an item has been damaged and/or as a prerequisite before an item is issued. The Charge Assessment window allows the site user to document the specifics of a charge and its payment history.

Assess a Charge

Assessing a charge with a tag allows the site user to document and/or receive a specified dollar amount regarding an item/tag issued to the staff member: for example, missing accessory, broken part, late charge, etc.

A charge can be assessed without a tag to allow the site user to document and/or receive a specified dollar amount prior to the issuance of an item to a staff member: for example, insurance, deposit, permission form, etc.

1. On the top navigation bar, click **Staff**.
2. Filter for the respective staff member.
3. In the respective staff member's row, click **Assess Charge** under the Actions column. The grid expands to display the following tabs: **Details**, **Inventory**, **Charges**, and **Attachments**.
4. Click on the **Charges** tab.
5. Click **Add Record**. The Assess a Charge window opens.



6. Select a charge type from the Charge Type drop-down menu.
    - If the administrative administrator does not require a tag to be associated with the selected charge type, skip to step 8.
7. Under the Actions header, click **Select** to associate an In Use item to the charge.
    - If the item is no longer in the status of In Use for this staff member, click on the **Show History** option in the Product and Tag header section. This will display all items which were previously issued to this staff member.
8. If desired, adjust the charge amount in the **Charge Amount** field. This step requires the user to have permission to change the amount, which is dictated on the Admin View Charge Types record.
9. Enter any respective notes regarding this charge into the **Charge Notes** field (optional).
10. Click **Save**. The charge is added to the Charge History grid at the bottom of the Assess a Charge window.
11. Click **Close** to close the Assess a Charge window.

Charge Types are created by the administrative administrator. Depending on established settings, a site user may or may not:

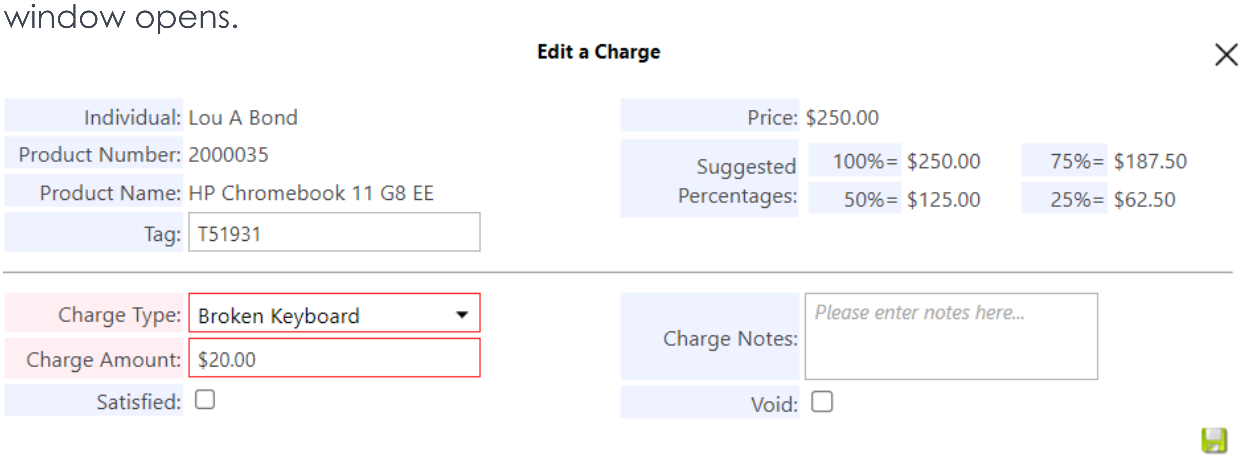
- Edit the price of a charge type*
- View percentages based on the product's replacement price

*If the Charge Amount displayed price is in black text, the charge amount can be edited.

Void a Charge

A charge can be voided only if there are no payments associated with the charge. To void a charge with payments, each payment must be voided first.

1. On the top navigation bar, click **Staff**.
2. Filter for the respective staff member.
3. In the respective staff member's row, click **Assess Charge** located under the Actions column. The grid expands to display the following tabs: **Details**, **Inventory**, **Charges**, and **Attachments**.
4. Click the **Charges** tab.
5. On the respective charge's row, click **Edit Assessed Charge**. The Edit a Charge window opens.



6. Select **Void**.
7. Click **Update**. The Void Charge Confirmation window opens and displays the message "You are about to void this charge. This action cannot be undone."
8. Click **OK**.

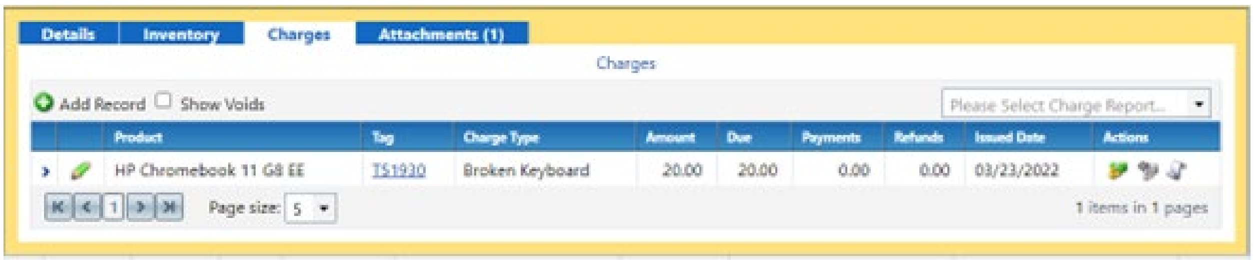
9. Click **Close** to close the Edit a Charge window.
10. Above the Charges grid for the respective staff member, select **Show Voids** to view the voided charge.

Staff Charge Payments

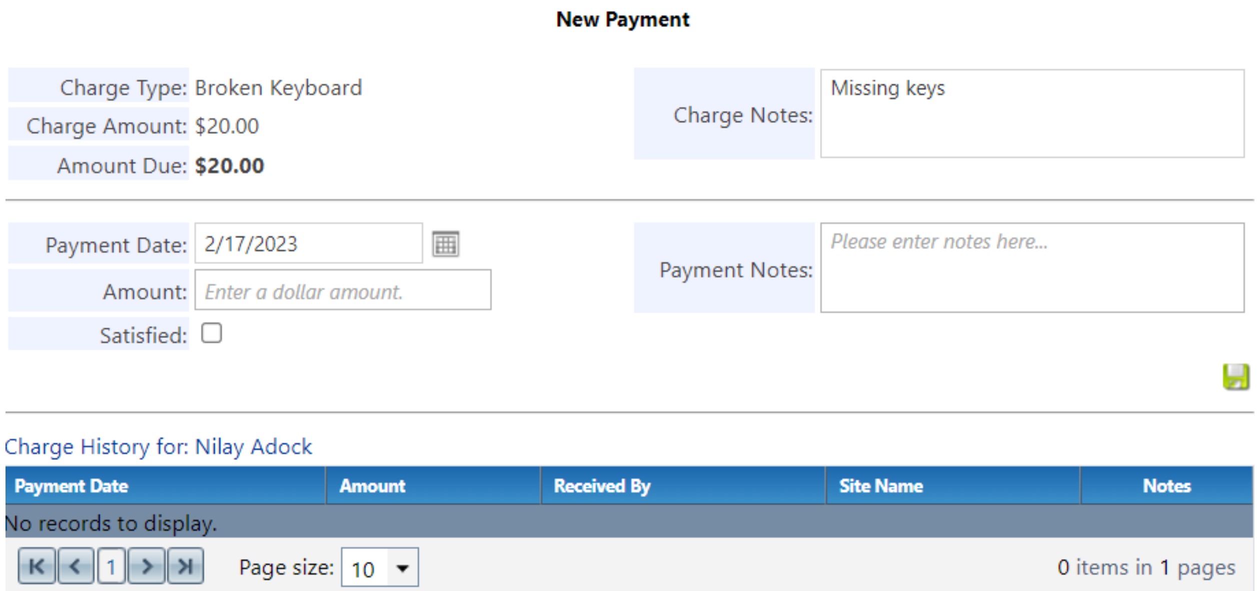
Charges are assessed when an item has been damaged and/or as a prerequisite before an item is issued.

Process a Charge Payment

1. On the top navigation bar, click **Staff**.
2. Filter for the respective staff member.
3. In the respective staff member's row, click **Assess Charge** under the Actions column. The grid expands displaying the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.



4. In the respective charge's row, click **New Charge Payment** under the Actions column. The New Payment window opens.
5. Enter a payment amount into the **Amount** field.
6. Enter any respective notes regarding this charge into the **Payment Notes** field (optional).



7.

8. Click **Save**. The charge payment is added to the Charge History grid at the bottom of the New Payment window and the message "Payment has been saved successfully" displays.

If the Payment Amount matches the Charge Amount Due, the charge will automatically be set to **Satisfied**. If a Charge Payment is voided for a satisfied charge, the charge will automatically return to **Unsatisfied**.
Charge Types are created by the administrative administrator. Depending on the established settings, a site user may or may not:

- edit the price of a charge type
- view percentages based on the product's replacement price

Refund a Charge Payment

Refunds to a charge payment are displayed on the staff member's Charge Receipt.

1. On the top navigation bar, click **Staff**.
2. Filter for the respective staff member.
3. In the respective staff member's row, click **Assess Charge** under the Actions column. The grid expands displaying the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.

4. On the respective charge's row, click **Refund**. The Issue Refund window opens.
5. Enter the respective refund amount in the **Refund Amount** field.
    A. The default amount for this field is the total charge amount received to date.
6. Enter any respective notes regarding this charge into the Refund Notes field (optional).
7. Click **Save**.
    A. The refunded amount is displayed under the **Refunds** column in the Charges grid.

Void a Charge Payment

Refunds to a charge payment are displayed on the staff member's Charge Receipt.

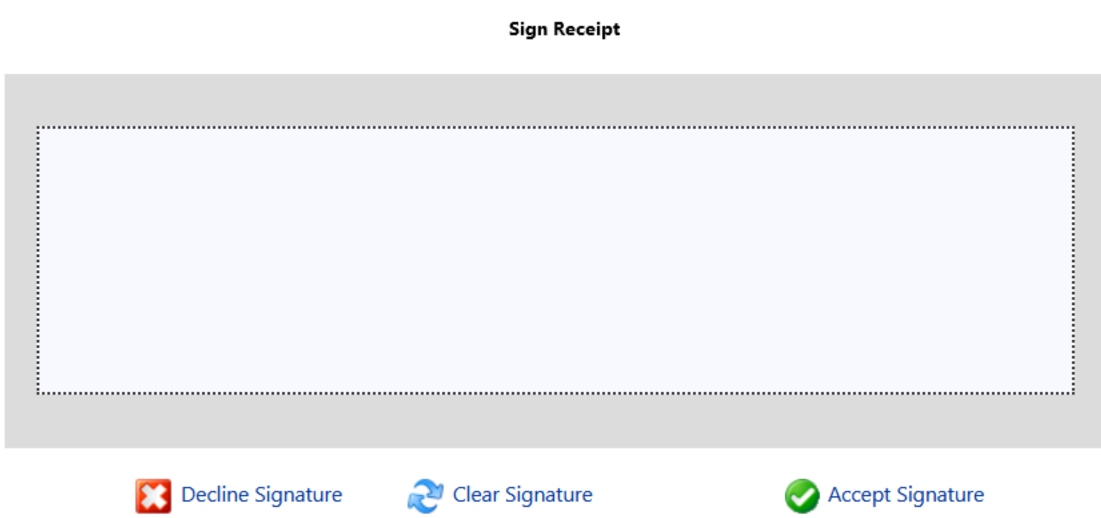
1. On the top navigation bar, click **Staff**.
2. Filter for the respective staff member.
3. In the respective staff member's row, click **Assess Charge** under the Actions column. The grid expands displaying the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
4. Click on the respective charge's row. The grid expands to display all respective payments.
5. On the respective payment's row, click **Edit Payment**. The Edit a Payment window opens.
6. Enter any respective notes regarding this charge into the **Payment Notes** field (optional).
7. Select **Void Payment**.
8. Click **Update**.

View/Sign a Collection Receipt from Staff

At the individual level, the collection receipt focuses on inventory collected or returned by a staff member. Once an item has been collected, the individual can digitally sign the receipt, which is then automatically stored under the **Attachments** tab.

View/Sign Collection Receipt from Staff Record

1. Click on **Staff**, located in the top navigation bar.
2. Click the name of respective staff member. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
3. Click on the **Inventory** tab.
4. Under "Actions," click on **Product Collection Receipt** in the row of the respective tag number. The "Product Collection Receipt" window opens.
5. Scroll to the bottom of the receipt and click **Sign Receipt**. The "Sign Receipt" window opens.
6. Using a mouse or stylus, sign in the window.
7. Click **Decline Signature**, **Clear Signature**, or **Accept Signature**.



- Clicking **Accept Signature** allows immediate access to a PDF of the receipt that contains the captured information and signature.

7. Click on **Close** to close the "Product Distribution Receipt" window.

E-Mail Collection Receipt to Staff

When "Allow Sites to E-Mail Receipts to Staff" is enabled, a digital copy of the collection receipt can be e-mailed and kept with the staff member's records.

1. Click on **Staff**, located in the top navigation bar.
2. Click the name of respective staff member. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
3. Click on the **Inventory** tab.
4. Under "Actions," click on **Product Collection Receipt** in the row of the respective tag number. The "Product Collection Receipt" window opens.
5. Scroll to the bottom of the receipt and click **E-Mail Receipt**. The "E-Mail Confirmation" window opens.
6. Enter an e-mail address in the **Staff E-Mail Address** field.
   - If the staff member has an e-mail address on file, the e-mail address automatically populates.
7. Select **Update E-Mail Record** to add the e-mail address to the staff member record. If your district updates staff records via integration with a student information system, you must update the email record in that system.
8. Click on **Confirm** to send the e-mail.
9. Click on **Close** to close the "Product Collection Receipt" window.

Staff Transaction Receipts

"Staff" are the employees to which an item is issued within a site. The "Staff Transaction Receipt" provides, in PDF format, a listing of all products and their respective tag numbers issued to a particular staff member.

View Staff Transaction Receipt

This report provides "Staff Name," "Address," "Site," "Date Printed," "Product Name," "Product ID," "Tag Number," "Serial Number," "Status," "Issued Date," "Returned Date," "Value," and "Accessory Information" (including quantity, name, value, and if it must be returned).

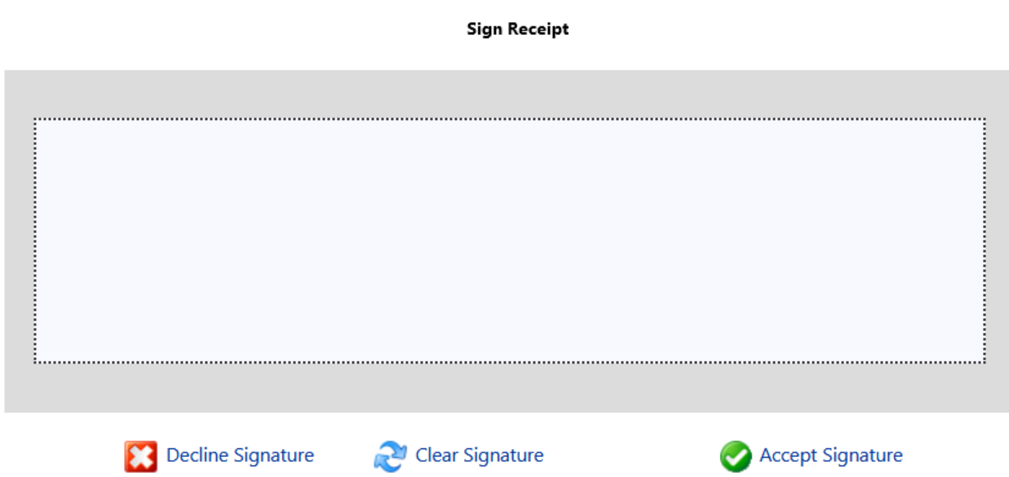
1. Click on **Staff**, located in the top navigation bar.
2. Filter for the respective staff member for whom you wish to print a receipt.
3. Click on **View Transaction Receipt**, located in the respective staff member's row under the "Actions" column. The "Transaction Receipt Report" window opens.
4. Review the print window.
5. Click on the PDF reader's print icon.
6. Click **Print**.
7. Click on **Close** to close the "Transaction Receipt Report" window.

Issuing a Distribution Receipt from Staff

At the individual level, the distribution receipt focuses on a single inventory item assigned to a staff member. Once an item has been assigned, the individual can digitally sign the receipt, which is then automatically stored under the **Attachments** tab.

View/Sign Distribution Receipt from Staff

1. Click on **Staff**, located in the top navigation bar.
2. Click the name of respective staff member or student. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
3. Click the **Inventory** tab.
4. Under "Actions," click on **Product Distribution Receipt** in the row of the respective tag number. The "Product Distribution Receipt" window opens.
5. Scroll to the bottom of the receipt and click **Sign Receipt**. The "Sign Receipt" window opens.
6. Using a mouse or stylus, sign in the window.
7. Click **Decline Signature**, **Clear Signature**, or **Accept Signature**. (Clicking **Accept Signature** allows immediate access to a PDF of the receipt containing the captured information and signature.)



7. Click on **Close** to close the "Product Distribution Receipt" window.

E-Mail Distribution Receipt from Staff

When "Allow Sites to E-Mail Receipts to Staff" is enabled, a digital copy of the collection receipt can be e-mailed and kept with the staff member's records.

1. Click on **Staff**, located in the top navigation bar.
2. Click the name of respective staff member. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
3. Click the **Inventory** tab.
4. Under "Actions," click on **Product Distribution Receipt** in the row of the respective tag number. The "Product Distribution Receipt" window opens.
5. Scroll to the bottom of the receipt and click **E-Mail Receipt**. The "E-Mail Confirmation" window opens.
6. Enter an e-mail address in the **Staff E-Mail Address** field.
    - If the staff member, student, or parent has an e-mail address on file, the e-mail address automatically populates.
7. Select **Update E-Mail Record** to add the e-mail address to the staff member's record.
8. Click on **Confirm** to send the e-mail.
9. Click on **Close** to close the "Product Distribution Receipt" window.

Note:

- If the receipt was previously signed, it can be viewed from the **Attachments** tab for the respective user.
- If an item has a due date, the "Due Date" is indicated in the bottom-right corner of the "Product Distribution Receipt." By signing the "Product Distribution Receipt," the staff acknowledges the due date.

Staff Charge Receipts

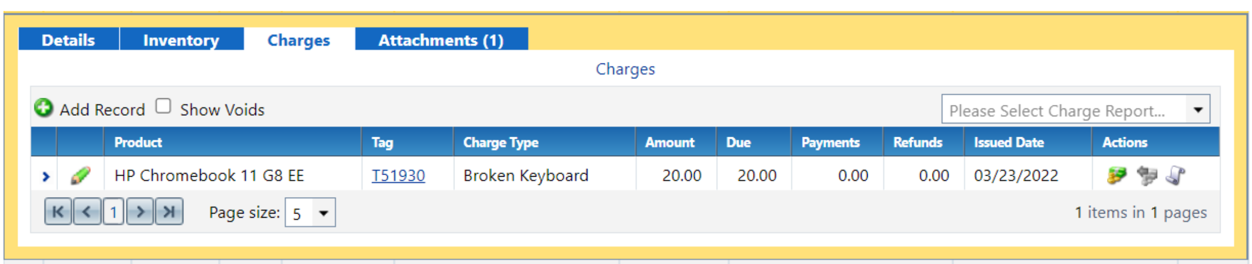
"Charges" are assessed when an item has been damaged and/or as a prerequisite before an item is issued. "Charge Types" are created by the administrator. All charges require the selection of an established "Charge Type." The administrator also determines whether users can adjust the dollar amount required to satisfy a charge. Charges can be either "Unsatisfied" or "Satisfied."

When charges are applied to a staff account it is possible to generate an individual "Charge Receipt" or a "Full Charges Receipt."

View Staff Charge Receipt

The "Staff Charge Receipt" provides, in PDF format, the information regarding the product, the charge type assigned, the status of the charge, any charge notes, and payment history, including who collected the payment and from which campus the payment was collected, for a particular staff member.

1. Click on **Staff**, located in the top navigation bar.
2. Filter for the respective staff member.
3. Click on the respective staff member's row. The grid expands displaying the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
4. Click on the **Charges** tab. The "Charges" grid expands.



5. Locate the item where the charge was assessed.
6. Click on **Charge Receipt**, located in the respective charge's row under the "Actions" column. The receipt launches as a PDF.
7. Click on **Close** to close the "Charge Receipt" window.

View Full Charge Receipt

The "Full Charge Receipt" provides, in PDF format, information regarding all items issued to the staff member, the charge types assigned, the charge dates, the charge amounts, any charge notes, and payment summary for each charge. The report also provides the total of all charges, total paid, and total amount due.

1. Click on **Staff**, located in the top navigation bar.
2. Filter for the respective staff member.
3. Click on the respective staff member's row. The grid expands displaying the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
4. Click on the **Charges** tab. The "Charges" grid expands.
5. Click on **Please Select Charge Report** drop-down menu, located above the blue grid header.
6. Select **Full Charges Receipt** under the "--- PDF ---" menu subcategory. The "Full Charge Receipt Settings" window opens.
7. Select **Charge Date**, **Charge Amount**, **Charge Type**, or **Product Name** from the "Sort By" drop-down menu. **Charge Date** is selected by default.
8. Select **Include Satisfied Charges** to include satisfied charges on the receipt.
9. Click on **GO**. The receipt launches as a PDF.
10. Click on **Close** to close the "Full Charge Receipt Settings" window.

The "Full Charges Receipt" sorts accordingly:

- Charge Date: Most recent date first
- Charge Amount: Highest charge amount
- Charge Type: Alphabetically by type

The "Full Charges Receipt" sorts accordingly:

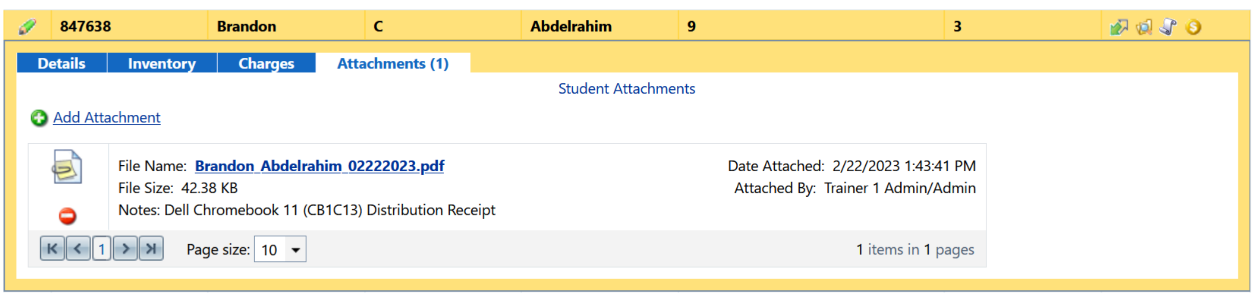
- Product Name: Alphabetically by product, then non-product

If the **Show Voids** filter is selected, the "Full Charges Receipt" dropdown is hidden from the user.

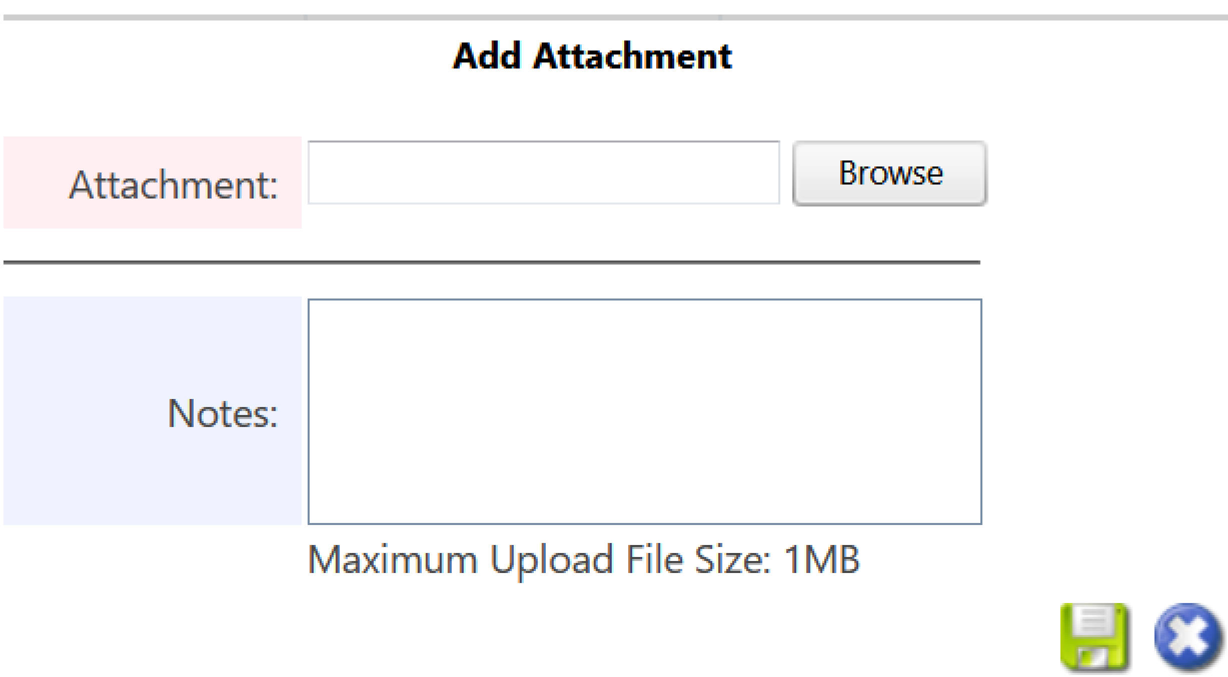
Saving Attachments to Staff Records

It is possible to manually add staff members. The best practice is to set up a nightly integration with your student information system. If manually entering staff members, use the ID number produced by your student management system. The data import to update the record you added and will not create a second account for the same staff member.

1. On the top navigation bar, click **Staff**.
2. Click the name of the respective student or staff member. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
3. Click the **Attachments** tab. The attachments grid expands.



4. Click **Add Attachment**. The Add Attachment window opens.



5. Click **Browse** to locate the respective file, then click the file name. Files are restricted to a single 1MB or less file.
6. Click **Open** to add the file.
7. Enter respective notes regarding the file in the Notes field. Notes have a 500-character limit restriction.
8. Click **Save**.

Acquire Floating Staff and Issue Item

This process allows a site to issue an item to a staff member who "floats" between multiple sites.

If the staff member does not currently reside in your site's staff grid (your site may not be listed as the staff member's "home" site in your district's student information system), you can acquire the individual through the Quick Issue to Staff screen. Once the item has been issued, the item will be in the status of In Use.

After the item you issued to this floating staff member has been collected, the staff member will no longer appear on your staff grid.

Acquire and Issue an Item to a Floating Staff Member

1. Located in the Site Tools Quick Links menu, click **Issue to Staff**. The Issue Inventory window opens.
2. Enter/scan the staff member's ID number in the Staff ID field.
3. If the ID is located within your district's staff data, the **Staff Not Found** window opens and displays the following message: "The Staff ID entered does not exist at your site. Click OK to add this staff member and continue." Click **OK** to acquire the staff member to your site.
4. If multiple tags are to be issued to the same staff member, select the **Lock** icon next to the Staff ID field. This allows you to scan all the tag numbers without entering the same staff member's ID for each tag.
5. Enter/scan the tag number to be issued in the **Tag** field.
6. Click **Save**. The district-wide Current Inventory for this staff member is displayed in the bottom grid. It displays all tags issued from all sites to this staff member.
7. If desired, collect a digital signature to generate a distribution receipt by selecting **Full Distribution Receipt** from the “Please Select Inventory Report” dropdown menu. Today's Transaction Receipt only displays the items issued or collected today (district wide). All other items on the staff member's account, including those items issued or collected today, are available on the Full Transaction Receipt (district wide).

8. Click **Done** to close the Issue Inventory window.

End-of-Year Collection and Reporting

The following end-of-year considerations and examples cover the process processes around collecting issued devices from students and staff members before the leave for summer break.

While each district is different, the following examples are common processes and procedures districts are using to make collection as efficient as possible.

Collection Process Considerations

- Students can be scheduled to drop off devices at a specific time period.
- Communicate to families ahead of time about the items required for drop off (i.e., asset only, or asset and accessories).

Collection Methods

- Have a manned collection process where students can hold up asset for quick, hands-free scanning by staff members.
- Have a drop-off location for students to leave assets. Staff members can later scan assets using Quick Collect.
- If you have a single collection location, utilize carts, pallets, or boxes.

Digital Signature Options

- Make sure the collection device has easy access so that parents/students can easily sign.
- Ensure signed collection receipts are attached to student accounts in the district settings.
- Have sanitation items available for cleaning sign-in devices after each use.

High-Level Collection Process Examples

The following are collection example scenarios to consider.

Scenario 1

1. Students walk up to a specified station, bringing their assets and accessories.
2. A staff member scan devices and has the parents/students digitally sign (if applicable).
3. A second staff member places the device and accessories in a bag and transports the bag to the holding location on campus.

Scenario 2

1. Parent drives student up to vehicle-accessible drop off point.
2. A staff member scan devices and has the parents/students digitally sign (if applicable).
3. A second staff member places the device and accessories in a bag and transports the bag to the holding location on campus.

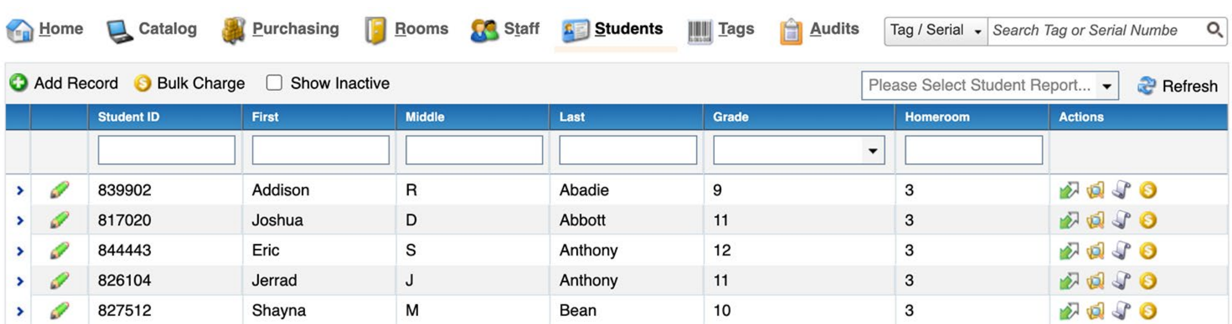
Students

Students Grid Overview

Students are the individuals within a site who may have an issued item. The Students grid allows you to search for active students (default) and inactive students (if "Show Inactive" is selected). Students are imported/updated on a nightly basis from your Student Management system.

Students Functionality

Students allows a site user to add students, edit student details, issue items to students, and view/print student inventory reports.



Functionality	
Add Record	Add a student to this site
Bulk Charge	Single charge assessed to multiple students
Show Inactive	Allows a search for and view of students marked as inactive

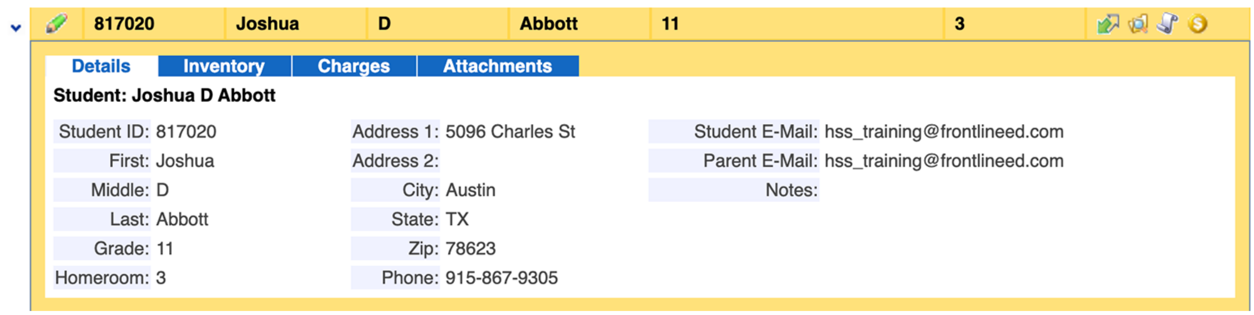
Functionality	
Search Fields	Located at the top of the Students grid, allows a site to search for a specific student using Student ID, First Name, Middle Name, Last Name, Grade, and Homeroom
Edit	Allows a site user to add/edit the respective student's details
Issue Inventory to Student	Under Actions, allows a site user to issue an item(s) to the respective student
Inventory History	Under Actions, displays the inventory history of the respective student, including Product Number, Product Name, Tag, Status, Scan Date, Source, Destination, Notes, and Custom Field Information
View Transaction Receipt Report	Under Actions, displays a list of all products and the respective tag numbers issued to the student (PDF format)
Assess Charge	Under Actions, allows charges to be assessed to a student for lost/stolen items and/or accessories

Students Selection

Selection of a student allows a user to view details for that respective student via a series of tabs.

Students Details

The "Details" tab displays each student's detailed information, as imported into Asset Management from the student management system and/or as entered by the site user.

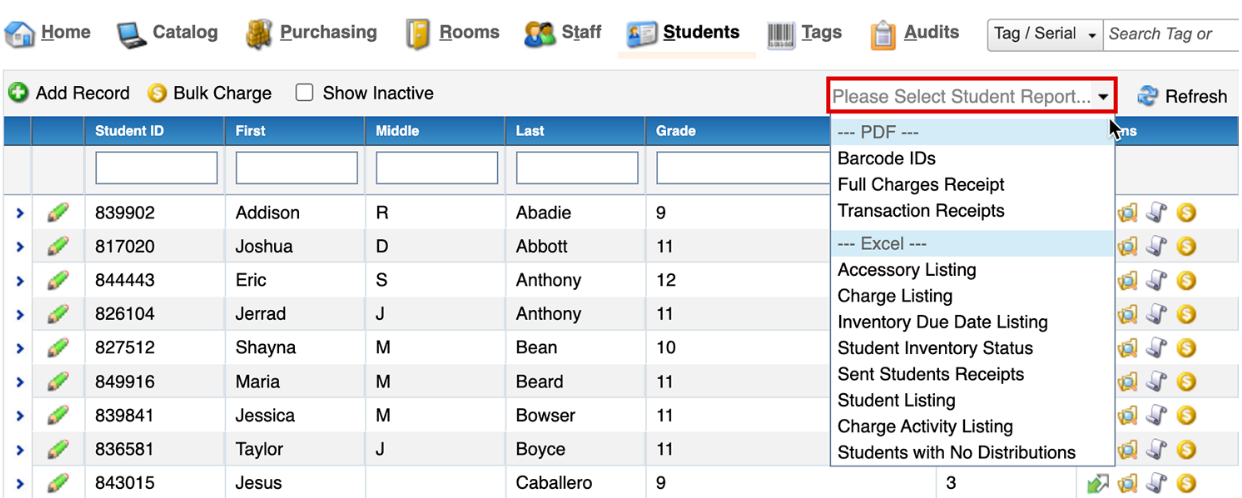


Students "Details" Tab	
Student ID	An alpha and/or numeric identification number
First	First name of student
Middle	Middle name of student
Last	Last name of student
Grade	Grade level the student is associated
Homeroom	Homeroom the student is associated
Address 1	Address of student
Address 2	Secondary address of student

Students "Details" Tab	
City	City of student
State	State of student
Zip	Zip code of student
Phone	Phone number of student
Student E-Mail	E-mail address of student
Parent E-Mail	E-mail address of parent
Notes	Displays any site user created notes

Students Reports

The Students grid provides multiple reports to be viewed and/or printed. When viewing reports, ALL STUDENTS are included unless the Students Grid has been filtered for a subset of records prior to running the report.



Students Reports	
Barcode IDs	Provides a list of all students within a site and their respective ID number barcode (PDF format)
Full Charges Receipts	Provides a report including full receipts of all charges and charge activity for each student
Transaction Receipts	Provides a list of all products and their respective tag numbers, issued to the student(s) (PDF format)
Accessory Listing	Provides a list of the quantity of accessories issued to students and quantity missing (CSV format)
Charge Listing	Provides a list of students with assessed charges (satisfied and/or unsatisfied) (CSV format)
Inventory Due Date Listing	Provides a list of students with overdue items (CSV format)
Student Inventory Status	Provides a list of students, items issued to them, and the respective details of those items

Students Reports	
Student Listing	Provides a list of the students (CSV format)
Charge Activity Listing	Provides a list of the student's respective charges (satisfied or unsatisfied), and any charge payments (payment, void, or refund (CSV format)
Students with No Distributions	Provides a list filtered by Product Type of students who were not issued the respective product type (CSV format)
View Transaction Receipt Report	Student Grid area – provides a list of all products and the respective tag numbers issued to the student(s) (PDF format)

Running Students Reports

"Students" are the individuals that may have an issued item within a site. The "Students" grid provides access to several preconfigured reports in PDF format, or as a CSV or XLSX extract that can be viewed and manipulated in a spreadsheet program such as Excel or Google Sheets. "Students" reports include all students located at the current site. To return a subset of data, the user must apply a filter to the records in the grid prior to running the report.

Barcode IDs Report

This report, in PDF format, provides "Student ID," "First Name," "Middle Name," "Last Name," and a respective barcode based on the student's ID number.

1. Click on **Students**, located in the top navigation bar.
2. Click on the **Please Select Student Report** drop-down menu, located above the blue grid header.
3. Select **Barcode IDs** under the "--- PDF ---" menu subcategory. The "Barcode IDs report" opens.

Full Charges Receipt

This report, in PDF format, provides student "Full Charges Receipts" with detailed information for all charges. The report includes "Student ID," "First Name," "Middle Name," "Last Name," "Student Address," "Date Printed," "Product Name," "Product Number," "Tag," "Charge Type," "Charge Date," "Amount," "Satisfied Date," and "Accessories."

1. Click on **Students**, located in the top navigation bar.
2. Click on **Please Select Staff Report** drop-down menu, located above the blue grid header.
3. Select **Full Charges Receipts** under the "--- PDF ---" menu subcategory. The "Full Charges Receipts" report opens.

Transaction Receipts

This report, in PDF format, provides student transaction receipts with detailed item information status for issued items. The report includes "Student ID," First Name," "Middle Name," "Last

Name," "Student Address," "Date Printed," "Product Name," "Product Number," "Tag," "Status," "Issued On Date," "Returned On Date," "Value," and "Accessories."

1. Click on **Students**, located in the top navigation bar.
2. Click on **Please Select Staff Report** drop-down menu, located above the blue grid header.
3. Select **Transaction Receipts** under the "--- PDF ---" menu subcategory. The "Transaction Receipts" report opens.

Charge Listing Report

This report, in CSV format, provides a list of respective charges (satisfied or unsatisfied) for students at the respective site. The report combines all respective payments for a charge into one "Amount Paid" field. It includes "Student ID," "First Name," "Middle Name," "Last Name," "Grade," "Homeroom," "Product," "Tag," "Charge Type," "Description," "Charge Notes," "Issue Date," "Site Name," "Charge Amount," "Amount Paid" (all respective payments), "Amount Due," and "Satisfied Date."

1. Click on **Students**, located in the top navigation bar.
2. Click on **Please Select Student Report** drop-down menu, located above the blue grid header.
3. Select **Charge Listing** under the "--- Excel ---" menu subcategory. The "Filter Report" window opens.
4. (Optional) Filter charges using the **Charge Type** and **Charge Issued** drop-down menus.
5. Click on **GO**.
6. If prompted "Do you want to open or save “StaffChargeListing.csv," click on **Open**. The "Charge Listing" report opens within Microsoft Excel.

Student Inventory Status Report

This report, in CSV format, provides a detailed list of items issued to students. This report includes "Site Name," "Student ID," "Last Name," "First Name," "Middle Name," "Grade," "Home

Room," "Student Notes," "Product Name," "Model," "Product Type," "Suggested Price," "Tag," "Serial," "Asset Type," "Parent Tag," "Scan Date," "Status," "Status Date," and "Status Notes."

1. Click on **Students**, located in the top navigation bar.
2. Click on **Please Select Student Report** drop-down menu, located above the blue grid header.
3. Select **Student Inventory Status** under the "--- Excel ---" menu subcategory. The "Filter Report" window opens.
4. (Optional) Filter the status using the **Status** and **Date Range** drop-down menus.
5. Choosing **Custom Date Range** opens additional fields.
    1. Click on **Open the calendar popup** to select the "Start Date."
    2. Click on **Open the time view popup** to select the start time.
    3. Click on **Open the calendar popup** to select the "End Date."
    4. Click on **Open the time view popup** to select the end time.
6. Click on **GO**.
7. If prompted "Do you want to open or save “StudentInventoryStatus.csv," click on **Open**. The "Student Inventory Status" report opens within Microsoft Excel.

Sent Students Receipts Report

This report, in CSV format, provides a list of receipts sent to students. This report includes "Site ID," "Site Name," "Location Type," "ID," "Last Name," "First Name," "Middle Name," "Grade," "Homeroom," "Receipt Type," "Signed Receipt," "E-Mail Date," "Student E-Mail," and "Parent E-Mail."

1. Click on **Students**, located in the top navigation bar.
2. Click the **Please Select Students Report** drop-down menu, located above the blue grid header.
3. Select **Sent Students Receipts** under the "--- Excel ---" menu subcategory. The "Sent Students Receipt Report" window opens.

4. Select the **Sent Receipt Date Range** from the drop-down menu.
5. Select the **Sent Receipt Type** from the drop-down menu.
6. Click on **GO**.
7. If prompted “Do you want to open or save “SentStudentsReceiptsReport.csv,” click on **Open**. The "Sent Students Receipts Report" opens within Microsoft Excel.
8. Click on **Close** to close the "Sent Students Receipts Report" window.

Student Listing Report

This report, in CSV format, provides a list of the students and includes "Student ID," "First Name," "Middle Name," "Last Name," "Grade," "Homeroom," and "Student E-Mail."

1. Click on **Students**, located in the top navigation bar.
2. Click on **Please Select Student Report** drop-down menu, located above the blue grid header.
3. Select **Student Listing** under the "--- Excel ---" menu subcategory.
4. If prompted "Do you want to open or save “Student.csv," click on **Open**. The "Student Listing" report opens within Microsoft Excel.

Charge Activity Listing Report

This report, in CSV format, provides charge details for respective students within a site. This report includes "Student ID," "First Name," "Middle Name," "Last Name," "Grade," "Homeroom," "Product," "Tag," "Charge Type," "Description," "Charge Notes," "Issue Date," "Site Name," "Charge Amount," "Activity Date," "Activity Type," "Activity Amount," "Activity Notes," "Activity Recorded By," and "Satisfied Date."

1. Click on **Students**, located in the top navigation bar.
2. Click on **Please Select Student Report** drop-down menu, located above the blue grid header.
3. Select **Charge Activity Listing** under the "--- Excel ---" menu subcategory.

4. If prompted "Do you want to open or save "StudentChargeActivityListing.csv," click on **Open**. The "Charge Activity Listing" report opens within Microsoft Excel.

Inventory Due Date Listing Report

This report, in CSV format, provides a list of students with overdue items. The report includes "Student ID," "First Name," "Middle Name," "Last Name," "Grade," "Homeroom," "Phone," "Student E-mail," "Parent E-Mail," "Product Name," "Tag," "Due Date," and "Past Due."

1. Click on **Students**, located in the top navigation bar.
2. Click on **Please Select Student Report** drop-down menu, located above the blue grid header.
3. Select **Inventory Due Date Listing** under the "--- Excel ---" menu subcategory.
4. If prompted "Do you want to open or save "InventoryDueDateListing.csv," click on **Open**. The "Inventory Due Date Listing" report opens within Microsoft Excel.

Students with No Distributions Report

This report, in CSV format, provides a list of students, respective to the site, with no issued items. The report includes "Student ID," "First Name," "Middle Name," "Last Name," "Grade," "Homeroom," and "Student Notes."

1. Click on **Students**, located in the top navigation bar.
2. Click on **Please Select Student Report** drop-down menu, located above the blue grid header.
3. Select **Students with No Distributions** under the "--- Excel ---" menu subcategory. The "Filter Report" window opens.
4. Select a product type(s) using the **Product Type** drop-down menu.
5. Click on **GO**.
6. If prompted "Do you want to open or save "StudentsWithNoDistributions.csv," click on **Open**. The "Students with No Distributions" report opens within Microsoft Excel.
7. Click on **Close** to close the "Filter Report" window.

Accessory Listing Report

This report, in CSV format, provides detailed information for accessories issued to students. This report includes "Student ID," "Last Name," "First Name," "Middle Name," "Grade," "Homeroom," "Product Name," "Accessory Name," "Issued Date," "Tag, "Quantity Issued," "Quantity Missing," and "Missing Value."

1. Click on **Students**, located in the top navigation bar.
2. Click on **Please Select Student Report** drop-down menu, located above the blue grid header.
3. Select **Accessory Listing** under the "--- Excel ---" menu subcategory.
4. If prompted "Do you want to open or save "StudentAccessoryListing.csv," click on **Open**. The "Accessory Listing" report opens within Microsoft Excel.

Creating a Report to See Student Inventory

When you begin to prepare for end-of-year, you need an accurate list of which student has what inventory. The following guide will help you create a report to see student inventory.

Access & Visibility: Site Admins can use this feature.

In Site View, you can use filter students in the Student Grid and use the Student Inventory Status to export a report. This report provides a listing of the students, the items issued to them, and the respective details of those items.

1. Under Site View, view the **Student Grid**.
2. **Filter** students for specific data set (i.e., homeroom or grade level).
3. In **Student Report Drop Down**, choose **Student Inventory Status**.
4. Choose **status** of inventory for report.
5. Choose a **date rang**e if desired.
6. **Export** the report in CSV format, which can be viewed in a spreadsheet application.

Create a Report to View Students with No Distributions

The No Distribution report allows you to identify students who do not have assigned devices. The following is a step-by-step process for creating a No Distribution report.

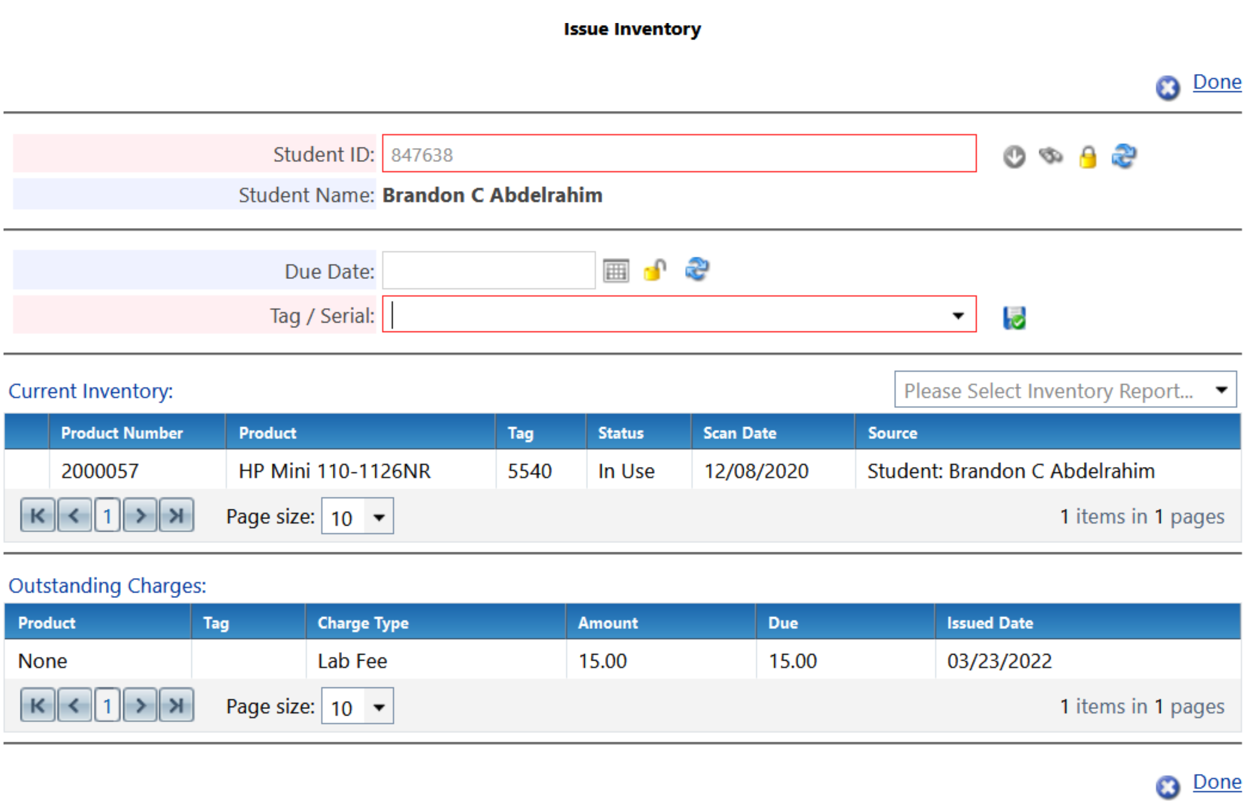
Creating a No Distribution Report

1. In Site view, select **Students** from the top navigation menu.
2. Choose the **Students Report** drop-down menu in the grid header.
3. Select the **Students with No Distribution** report.
4. Use the **Filter Report** menu to select all products that can be assigned as student devices.
5. Click the **Go** button and open the exported file in your favorite spreadsheet application.

Issue To Student Account

"Students" are individuals at a site who may have an issued item.

1. Click on **Students**, located in the top navigation bar.
2. Filter for the respective student.
3. Click on **Issue Inventory to Student**, located in the respective student's row under the "Actions" column. The "Issue Inventory" window opens.



4. Enter the tag number in the **Tag** field.
5. Click on **Save**. This updates the "Current Inventory" grid (displaying all tags issued to this student).
6. If the issued device includes accessories, it will be indicated with the **Accessories** icon to the left of the asset in the "Current Inventory" grid. Click the icon to change the quantity issued.

7. If a "Transaction Receipt" is desired for this transaction, select "Today's Transaction Receipt" from the **Please Select Inventory Report** drop-down menu above the "Current Inventory" grid.

8. Click on **Done** to close the "Issue Inventory" window.

Note:

- "Today's Transaction Receipt" only displays the items that have been issued or collected today. All other items on the student's account, including those items issued or collected today, are available on the "Full Transaction Receipt."

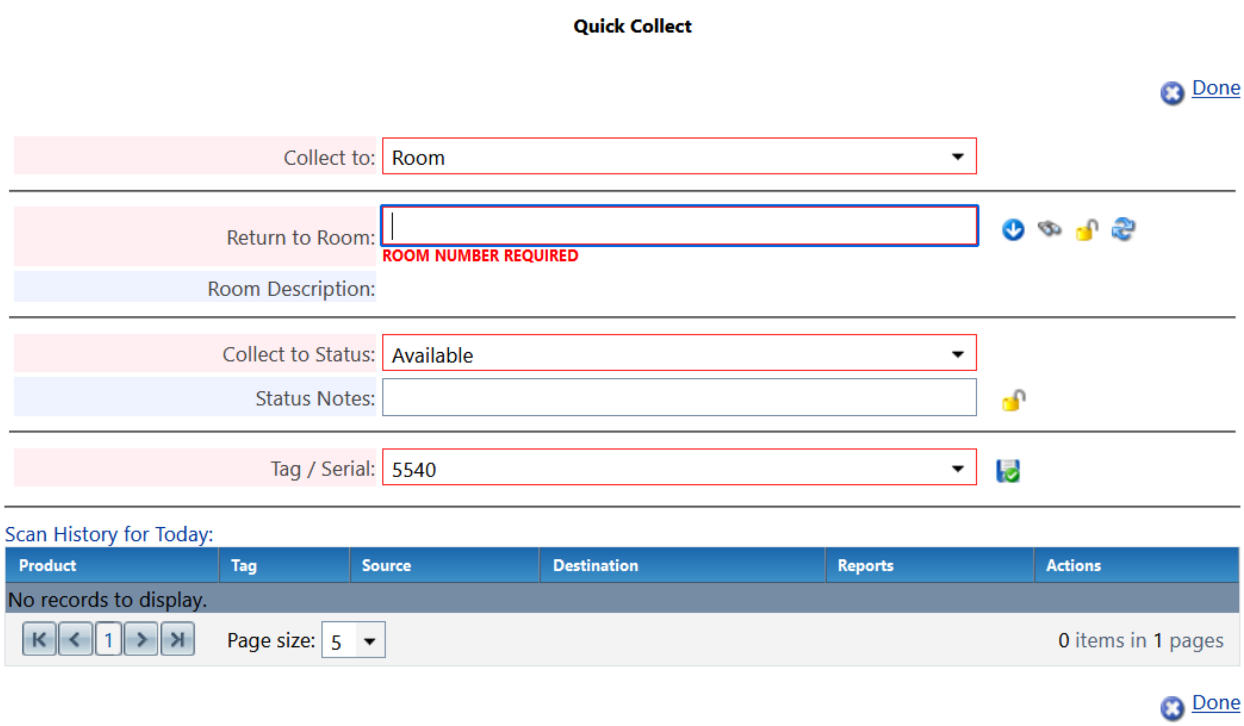
- If the tag(s) issued to the student are an "Asset Type" of "Component" or "Parent," an additional warning screen will display to verify the transaction.

Collect from Student to a Room

This process allows a site to collect from a student an item in the status of "In Use." To locate the tag's originating source before or after you have collected the item from the student, perform a "Tag Search" for the respective tag number and review the **Status History** tab.

Collect from Student to a Room

1. Click on **Students**, located in the top navigation bar.
2. Filter for the respective student. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs. The record expands to show the **Inventory** tab.
3. Locate the item to be collected and click on **Quick Collect** under the "Actions" column. The "Quick Collect" window opens.



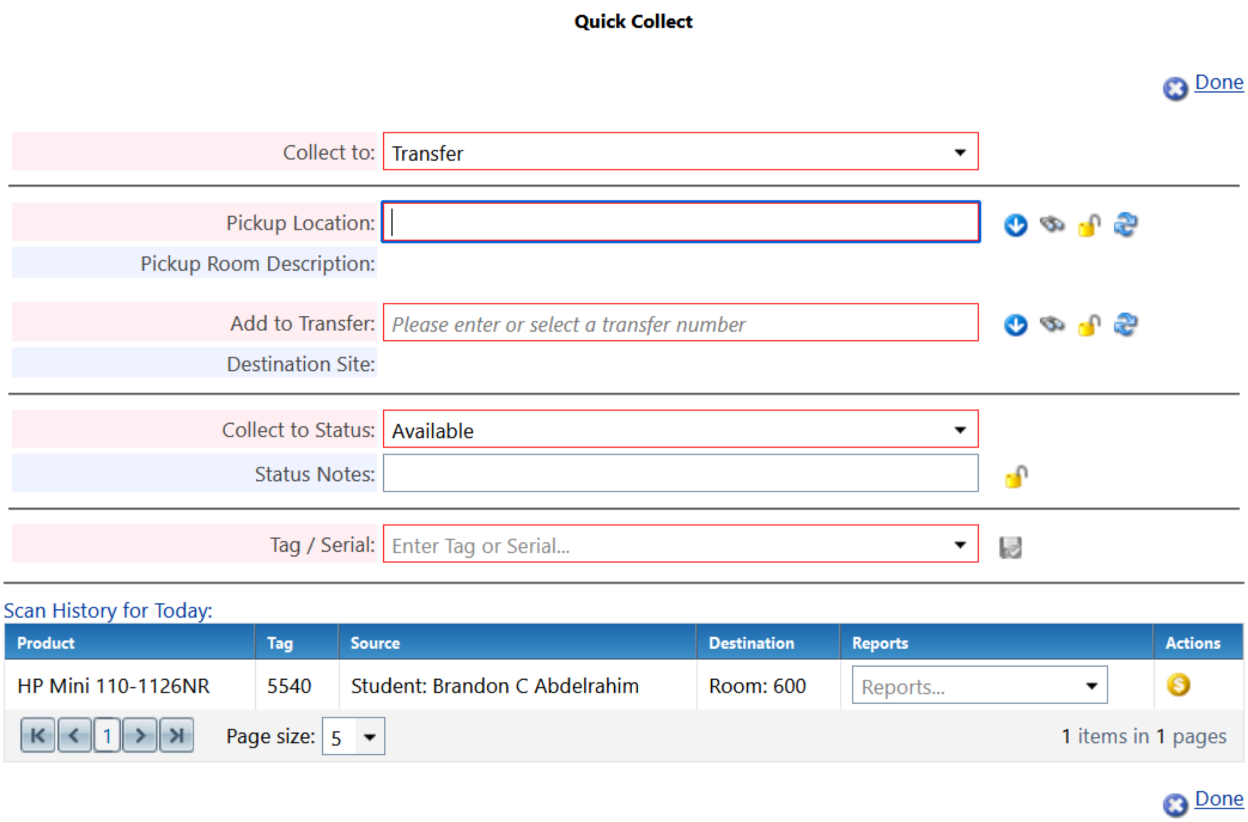
4. Click on **Search** and select the respective room. If you know the room number, you can type it directly into the **Room Number** field and press **Enter** on your keyboard.
5. Select the tag status from the **Collect to Status** drop-down menu.

6. (Optional) Enter notes in the **Status Notes** field.
    1. Click on **Lock/Unlock** to secure if collecting more than one asset.
7. Verify the tag number in the "Tag" field.
8. Click on **Save**.
    1. If there are accessories to be collected for this tag, they will display in the "Collect Accessories" grid. Edit the **Collected Quantity** for the respective accessory.
9. To collect the tag and respective accessories, click on **Collect Accessories**.
10. Click on **View Transaction Receipt**, located under the "Actions" column, to view the report in PDF format.
11. To assess a charge to a staff member's tag, click on **Assess Charge**, located under the "Actions" column on the "Audits" grid.
12. Click on **Done** to close the "Quick Collect" window.

Collect from Student to a Transfer

If the asset being collected is to be transferred to another site, it can be collected directly to a current transfer or to a new transfer.

1. Click on **Student**, located in the top navigation bar.
2. Click on the respective student's row. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs. The record expands to show the **Inventory** tab.
3. Locate the item to be collected and click on **Quick Collect** under the "Actions" column. The "Quick Collect" window opens.
4. Select **Transfer** from the "Collect to" drop-down menu.



5. Click on **Search** and select the respective room. If you know the room number, you can type it directly into the **Room Number** field and press **Enter** on your keyboard.
6. Click on **Search** next to the "Add to Transfer" field.
   - If the transfer does not exist, select a destination from the **Destination** drop-down menu located in the "Create a New Transfer" area. Click on **GO**.
   - To use an existing transfer, select the transfer from the "Search for an Existing Transfer" grid.
7. Select the tag status from the **Collect to Status** drop-down menu.
8. (Optional) Enter notes in the **Status Notes** field.
   - Click on **Lock/Unlock** to secure.
9. Verify the tag number in the "Tag" field.
10. Click on **Save**.

- If there are accessories to be collected for this tag, they will display in the "Collect Accessories" grid. Edit the **Collected Quantity** for the respective accessory.

11. To transfer the tag and respective accessories, click on **Collect Accessories**.
12. Click on **View Transaction Receipt**, located under the "Actions" column to view the report in PDF format.
13. To assess a charge to a staff member's tag, click on **Assess Charge**, located under the "Actions" column on the "Audits" grid.
14. Click on **Done** to close the "Quick Collect" window.

Create a Charge Listing Report for Students

When evaluating the charges for students and staff at the close of the school year, a Charge Listing Report is available from the site view. This report provides a listing of the students and their respective charges (satisfied or unsatisfied). It combines all respective payments for a charge into one Amount Paid field.

Access & Visibility: Site Admins can use this feature.

Creating a charge listing report

1. Navigate to the **Student Grid** in Site View.
2. **Filter the grid** for a specific data set, like homeroom or grade level.
3. Choose the **Student Report** drop down and select **Charge Listing**.
4. Choose the **status** of inventory for the report.
5. **Export** the report in CSV format and open it in your favorite spreadsheet software.

All students with no outstanding obligations or distributions will be set to "inactive."

Assess Student Charges

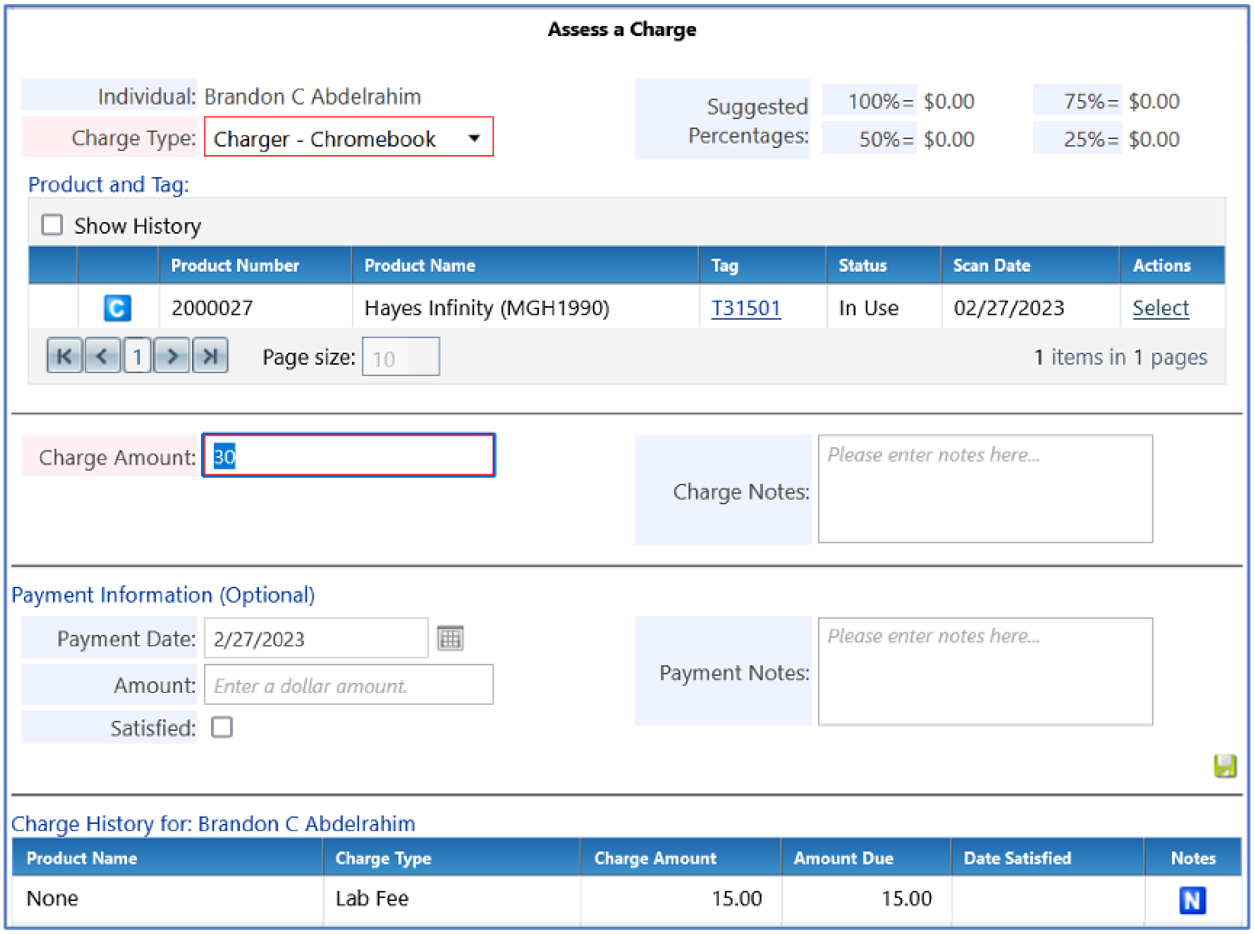
"Charges" are assessed when an item has been damaged and/or as a prerequisite before an item is issued. The "Charge Assessment" window allows the site user to document the specifics of a charge and its payment history.

Assess a Charge to a Student

Assessing a charge with a tag allows the site user to document and/or receive a specified dollar amount regarding an item/tag issued to a student (for example, a missing accessory, broken part, or late charge).

A charge can be assessed without a tag to allow the site user to document and/or receive a specified dollar amount prior to the issuance of an item to a staff (for example, insurance, deposit, or permission form).

1. Click on **Students**, located in the top navigation bar.
2. Filter for the respective student.
3. Click on **Assess Charge**, located in the respective student's row under the "Actions" column. The grid expands displaying the **Details**, **Inventory**, **Charges**, and **Attachments** tabs. The record expands and displays the **Charges** tab.
4. Click on **Add Record**. The "Assess a Charge" window opens.



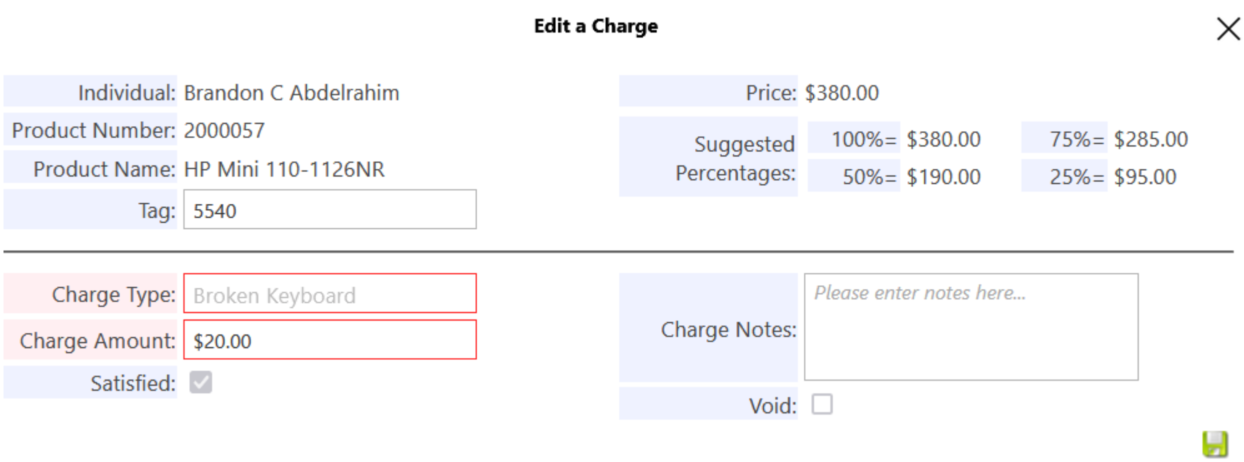
5. Select a charge type from the **Charge Type** drop-down menu.
   - If the charge type does not require a tag to be associated with the selected charge type, skip to step 8.
6. Click on **Select**, located under the "Actions" header, to associate an "In Use" item to the charge.
   - If the item is no longer in the status of "In Use" for this student, click on the **Show History** option in the "Product and Tag" header section. This will display all items that were previously issued to this student.
7. If the charge type allows, and it is desired, adjust the charge amount in the **Charge Amount** field.
8. (Optional) Enter any respective notes regarding this charge into the **Charge Notes** field.

9. Click on **Save**. The charge is added to the "Charge History" grid at the bottom of the "Assess a Charge" window.
10. Click on **Close** to close the "Assess a Charge" window.

Void a Charge for a Student

A charge can be voided only if there are no payments associated with the charge. In order to void a charge with payments, each payment must be voided first.

1. Click on **Students**, located in the top navigation bar.
2. Filter for the respective student.
3. Click on **Assess Charge**, located in the respective student's row under the "Actions" column. The grid expands displaying the **Details**, **Inventory**, **Charges**, and **Attachments** tabs. The record expands and displays the **Charges** tab.
4. Click on **Edit Assessed Charge**, located on the respective charge's row. The "Edit a Charge" window opens.


Edit a Charge

Individual: Brandon C Abdelrahim
Product Number: 2000057
Product Name: HP Mini 110-1126NR
Tag: 5540
Price: $380.00
Suggested Percentages: 100%= $380.00 75%= $285.00 50%= $190.00 25%= $95.00
Charge Type: Broken Keyboard
Charge Amount: $20.00
Satisfied:
Charge Notes: Please enter notes here...
Void:

5. Select **Void**.
6. Click on **Update**. The "Void Charge Confirmation" window opens and displays the message "You are about to void this charge. This action cannot be undone."
7. Click **OK**.
8. Click on **Close** to close the "Edit a Charge" window.

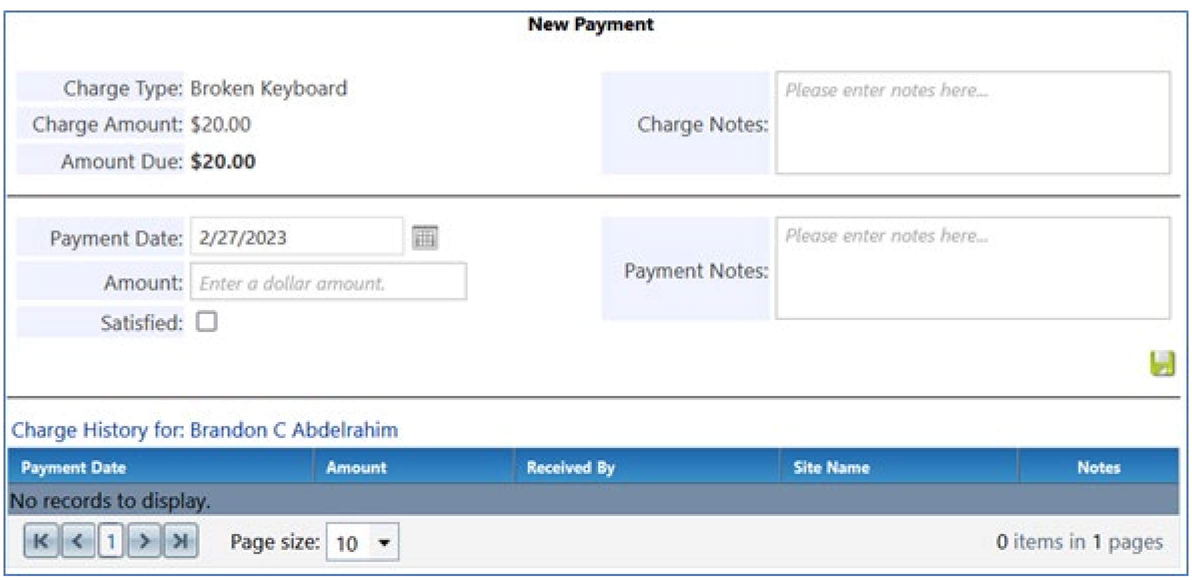
9. To view the voided charge, select ☐ **Show Voids**, located above the "Charges" grid for the respective student.

Student Charge Payments

Charges are assessed when an item has been damaged and/or as a prerequisite before an item is issued. Charge Types are created by the administrative administrator and all charges require the selection of an established Charge Type. The administrative administrator also determines if site level users can adjust the dollar amount required to satisfy a charge. Charges can be either unsatisfied or satisfied.

Process a Charge Payment

1. Click on **Students**, located in the top navigation bar.
2. Filter for the respective student.
3. Click on **Assess Charge**, located in the respective student's row under the **Actions** column. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs. The **Charges** tab is expanded.
4. Click on **New Charge Payment**, located in the respective charge's row under the **Actions** column. The **New Payment** window opens.



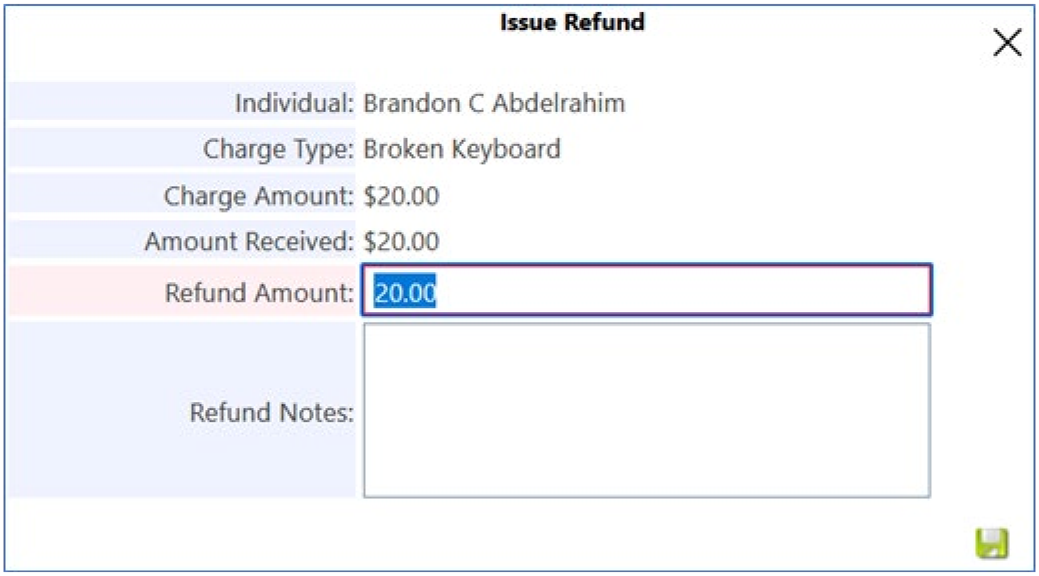
5. Enter a payment amount into the **Amount** field.

If the Payment Amount matches the Charge Amount Due, the charge will automatically be set to satisfied. If a Charge Payment is voided for a satisfied charge, the charge will automatically return to unsatisfied.

6. Enter any respective notes regarding this charge into the **Payment Notes** field (optional).
7. Click on **Save**. The Charge Payment is added to the **Charge History** grid at the bottom of the **New Payment** window and the message "Payment has been saved successfully" displays.
8. Click on **Close** to close the **New Payment** window.

Refund a Charge Payment

1. Click on **Students**, located on the top navigation bar.
2. Filter for the respective student.
3. Click on **Assess Charge**, located in the respective student's row under the **Actions** column. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs. The **Charges** tab is expanded.
4. Click on **Refund**, located in the respective charge's row under the **Actions** column. The **Issue Refund** window opens.



5. Enter the respective fund amount in the **Refund Amount** field.
    a. The default amount for this field is the total charge amount received to date.

6. Enter any respective notes regarding this refunded payment into the **Refund Notes** field (optional).

7. Click on **Save**.
    a. The refunded amount is displayed under the **Refunds** column in the **Charges** grid.

The refunded amount is displayed under the **Refunds** column in the **Charges** grid.

Void a Charge Payment

Refunds to a charge payment are displayed on the staff member's Charge Receipt. If a Charge Payment is voided for a satisfied charge, the charge will automatically return to unsatisfied.

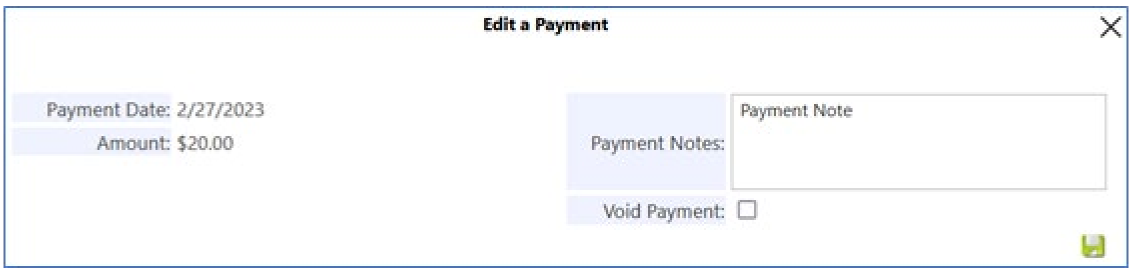
1. Click on **Students**, located on the top navigation bar.

2. Filter for the respective student.

3. Click on **Assess Charge**, located in the respective student's row under the **Actions** column. The grid expands and displays

the **Details**, **Inventory**, **Charges**, and **Attachments** tabs. The **Charges** tab is expanded.

4. Click on the respective charge's row. The grid expands to display all respective payments.
5. Click on **Edit Payment**, located on the respective payment's row. The **Edit a Payment** window opens.



6. Enter any respective notes regarding this charge into the **Payment Notes** field (optional).
7. Select Void **Payment**.
8. Click on **Update**.

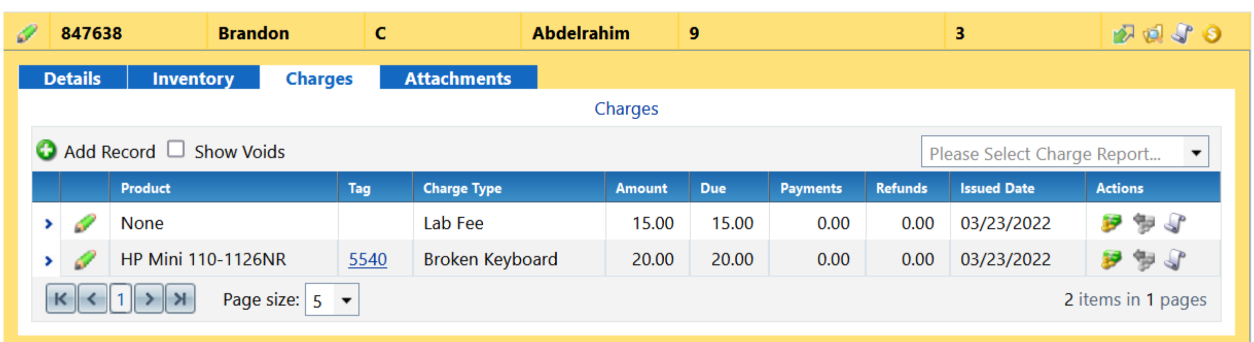
Student Charge Receipts

Charges are assessed when an item has been damaged and/or as a prerequisite before an item is issued. Charge Types are created by the administrative administrator and all charges require the selection of an established Charge Type. The administrative administrator also determines if site level users can adjust the dollar amount required to satisfy a charge. Charges can be either unsatisfied or satisfied.

View Student Charge Receipt

The Charge Receipt provides, in PDF format, the information regarding the product, the charge type assigned, the status of the charge, any charge notes, and payment history, including who collected the payment and from which campus the payment was collected, for a particular student.

1. Click on **Students**, located in the top navigation bar.
2. Filter for the respective student.
3. Click on the respective student's row. The grid expands displaying the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
4. Click on the **Charges** tab.

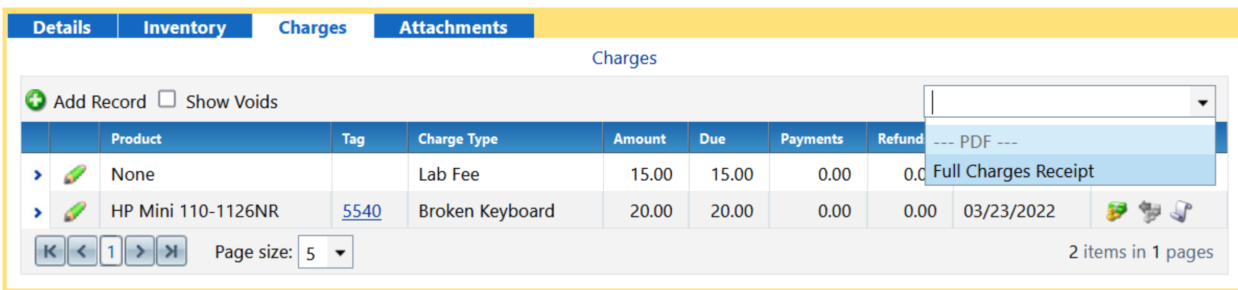


5. Locate the item where the charge was assessed.
6. Click on **Charge Receipt**, located in the respective charge's row under the **Actions** column. The receipt launches as a PDF.
7. Click on **Close** to close the **Charge Receipt** window.

View Full Charge Receipt

The Full Charge Receipt provides, in PDF format, information regarding all items issued to the student, the charge types assigned, the charge dates, the charge amounts, any charge notes, and payment summary for each charge. The report also provides the total of all charges, total paid and total amount due.

1. Click on **Students**, located on the top navigation bar.
2. Filter for the respective student.
3. Click on the respective student's row. The grid expands displaying the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
4. Click on the **Charges** tab.



5. Click on **Please Select Charge Report** drop-down menu, located above the blue grid header in the list of charges.
6. Select **Full Charges Receipt** under the --- PDF --- menu subcategory. The **Full Charge Receipt Settings** window opens.
7. Select **Charge Date**, **Charge Amount**, **Charge Type**, or **Product Name** from the **Sort By** drop-down menu.
   a. **Charge Date** is selected by default
8. Select Include **Satisfied Charges** to include satisfied charges on the receipt (optional).
9. Click on **GO**. The receipt launches as a PDF.
10. Click on **Close** to close the **Full Charge Receipt Settings** window.

Full Charges Receipt sorts accordingly:

- Charge Date - sorts by the most recent date first
- Charge Amount - sorts by the highest charge amount
- Charge Type - sorts alphabetically by type
- Product Name - sorts alphabetically by product, followed by non-products

If the Show Voids filter is selected, the Full Charges Receipt drop-down is hidden from user.

Student Transaction Receipts

Students are the individuals within a site that may have an issued item. The Student Transaction Receipt provides, in PDF format, a listing of all products and respective tag numbers issued to a particular student.

> **Note:** To view and/or print the Student Transaction Receipt, the computer you are using must have a PDF reader installed (for example, Adobe Reader).

View Individual Student Transaction Receipt

This report provides Student Name, Address, Site, Date Printed, Product Name & ID, Tag Number, Serial Number, Status, Issued Date, Returned Date, Value, and Accessory Information (including each accessory's quantity, name, and value, and whether it must be returned or not).

1. Click on **Student**, located in the top navigation bar.
2. Filter for the respective student.
3. Click on **View Transaction Receipt**, located in the respective student's row under the "Actions" column. The report opens in the "Transaction Receipt Report" window.
4. Click on **Close** to close the **Transaction Receipt Report** window.

Multiple Student Transaction Receipts

This report, in PDF format, provides student transaction receipts with detailed item information status for issued items. The report includes Student ID, First Name, Middle Name, Last Name, Student Address, Date Printed, Product Name, Product Number, Tag, Status, Issued On Date, Returned On Date, Value, and Accessories.

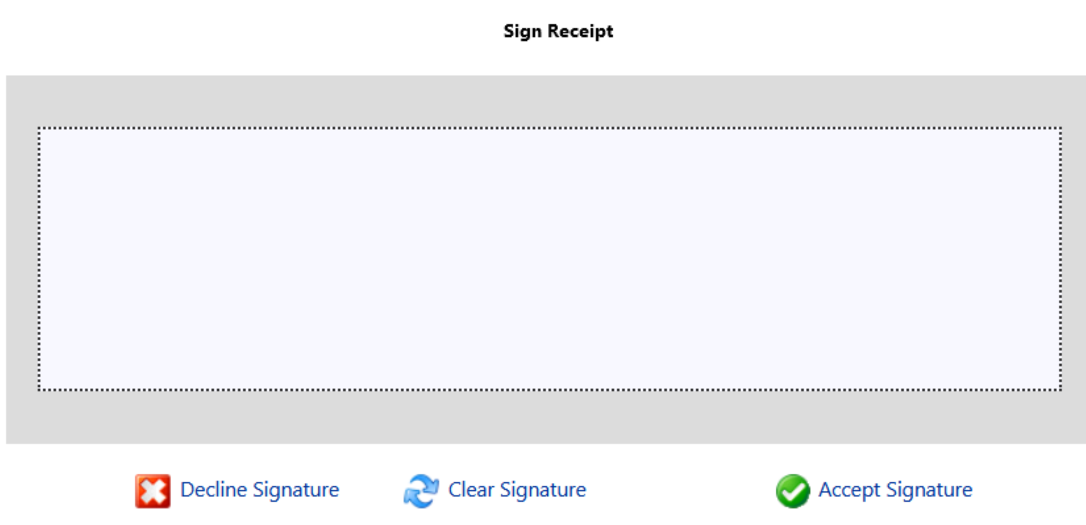
1. Click on **Students**, located in the top navigation bar.
2. Click on the **Please Select Student Report** drop-down menu, located above the blue grid header.
3. Select **Transaction Receipts** under the --- PDF --- menu subcategory. The **Transaction Receipts** report opens.

Issuing a Distribution Receipt from Student

At the individual level, the distribution receipt focuses on a single inventory item assigned to a student. Once an item has been assigned, the individual can digitally sign the receipt, which is then automatically stored under the **Attachments** tab.

View/Sign Distribution Receipt from Student

1. Click on **Students**, located in the top navigation bar.
2. Click the name of respective student. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
3. Click on the **Inventory** tab.
4. Under "Actions," click on **Product Distribution Receipt** in the row of the respective tag number. The "Product Distribution Receipt" window opens.
5. Scroll to the bottom of the receipt and click **Sign Receipt**. The "Sign Receipt" window opens.
6. Using a mouse or stylus, sign in the window.
7. Click **Decline Signature**, **Clear Signature**, or **Accept Signature**.



- Clicking **Accept Signature** allows immediate access to a PDF of the receipt containing the captured information and signature.

7. Click on **Close** to close the "Product Distribution Receipt" window.

E-Mail Distribution Receipt from Student

When "Allow Sites to E-Mail Receipts to Students/Parents" is enabled, a digital copy of the collection receipt can be e-mailed and kept with the student's records.

1. Click on **Students**, located in the top navigation bar.
2. Click the name of respective student. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
3. Click on the **Inventory** tab.
4. Under "Actions," click on **Product Distribution Receipt** in the row of the respective tag number. The "Product Distribution Receipt" window opens.
5. Scroll to the bottom of the receipt and click **E-Mail Receipt**. The "E-Mail Confirmation" window opens. Be sure to get the digital signature first if you want to email a signed receipt.
6. Enter an e-mail address in the **Student or Parent E-Mail Address** field.
    - If the staff member, student, or parent has an e-mail address on file, the e-mail address automatically populates.
7. Select **Update E-Mail Record** to add the e-mail address to the student or parent's record. If you district is integrated with a student information system for staff and/or student accounts, you must update the email address in that system.
8. Click on **Confirm** to send the e-mail.
9. Click on **Close** to close the "Product Distribution Receipt" window.

Note:

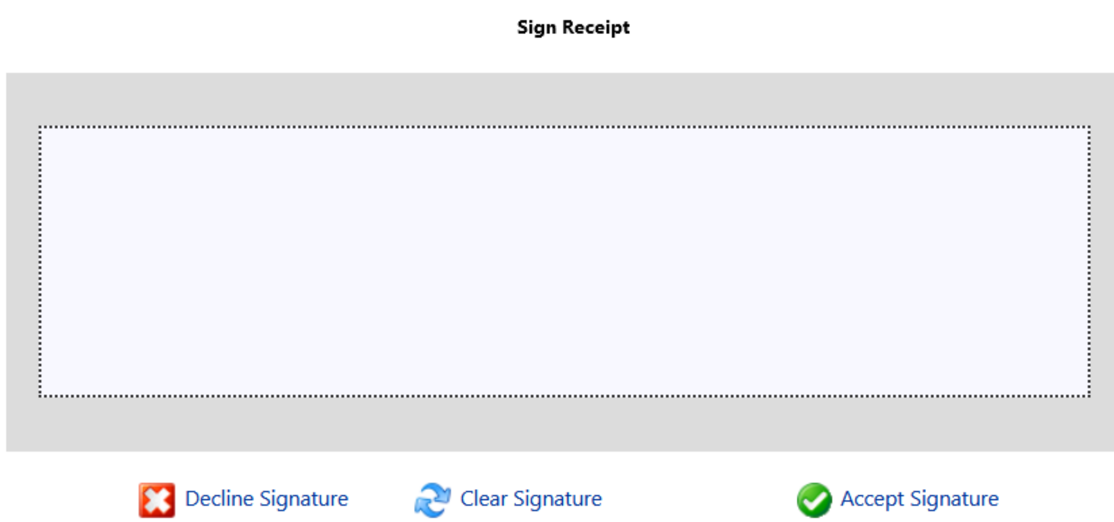
- If the receipt was previously signed, it can be viewed from the **Attachments** tab for the respective user.
- If an item has a due date, the "Due Date" is indicated in the bottom-right corner of the "Product Distribution Receipt." By signing the "Product Distribution Receipt," the student acknowledges the due date.

View/Sign a Collection Receipt from Student

At the individual level, the collection receipt focuses on inventory collected or returned by a student. Once an item has been collected, the individual can digitally sign the receipt, which is then automatically stored under the **Attachments** tab.

View/Sign Collection Receipt from Student

1. Click on **Students**, located in the top navigation bar.
2. Click the name of respective student. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
3. Click on the **Inventory** tab.
4. Under "Actions," click on **Product Collection Receipt** in the row of the respective tag number. The "Product Collection Receipt" window opens.
5. Scroll to the bottom of the receipt and click **Sign Receipt**. The "Sign Receipt" window opens.
6. Using a mouse or stylus, sign in the window.
7. Click **Decline Signature**, **Clear Signature**, or **Accept Signature**.



- Clicking **Accept Signature** allows immediate access to a PDF of the receipt that contains the captured information and signature.

7. Click on **Close** to close the "Product Distribution Receipt" window.

E-Mail Collection Receipt to Student

When "Allow Sites to E-Mail Receipts to Students/Parents" is enabled, a digital copy of the collection receipt can be e-mailed and kept with the student's records.

1. Click on **Students**, located in the top navigation bar.
2. Click the name of respective student. The grid expands and displays the **Details**, **Inventory**, **Charges**, and **Attachments** tabs.
3. Click on the **Inventory** tab.
4. Under "Actions," click on **Product Collection Receipt** in the row of the respective tag number. The "Product Collection Receipt" window opens.
5. Scroll to the bottom of the receipt and click **E-Mail Receipt**. The "E-Mail Confirmation" window opens.
6. Enter an e-mail address in the **Student or Parent E-Mail Address** field.
    - If the student or parent has an e-mail address on file, the e-mail address automatically populates.
7. Select **Update E-Mail Record** to add the e-mail address to the student or parent's record. If your district updates student records via integration with a student information system, you must update the email record in that system.
8. Click on **Confirm** to send the e-mail.
9. Click on **Close** to close the "Product Collection Receipt" window.

Note:

- If the receipt was previously signed, it can be viewed from the **Attachments** tab for the respective user.

- If an item has a due date, the "Due Date" is indicated in the bottom-right corner of the "Product Distribution Receipt." By signing the "Product Distribution Receipt," the student acknowledges the due date.

Bulk Assess Student Charges

With the Bulk Charge window, you can submit a single charge to multiple students at once. This is a great way to assess an annual acceptable use policy for those 1:1 programs, or issue an annual deposit for device use.

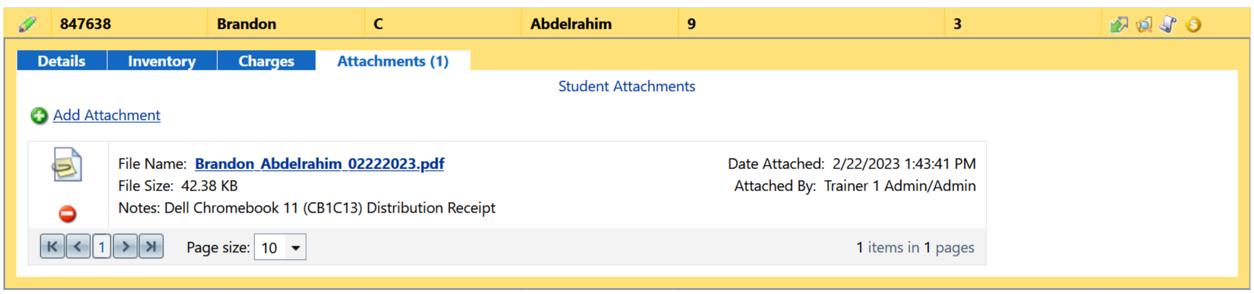
Bulk charges are applied to every student listed in the Students grid. To apply the charge to a subset of students (for example, 8th graders), filter the records in the Students grid prior to applying the charge.

1. On the top navigation bar, click **Students**.
2. Filter for the respective student.
3. Above the blue grid header, click **Bulk Charge**. The Bulk Charge window opens.
4. Select a charge type from the Charge Type drop-down menu. The Charge Amount auto-populates.
5. Enter any respective notes regarding this charge into the Charge Notes field (optional).
6. Enter information in the Payment Information section, as needed.
7. Click **GO**. The Bulk Charge Confirmation window opens.
8. In the Confirmation field, enter **Charge**.
9. Click **Confirm**.
10. Click **OK**.
11. Click **Close** to close the Bulk Charge window.

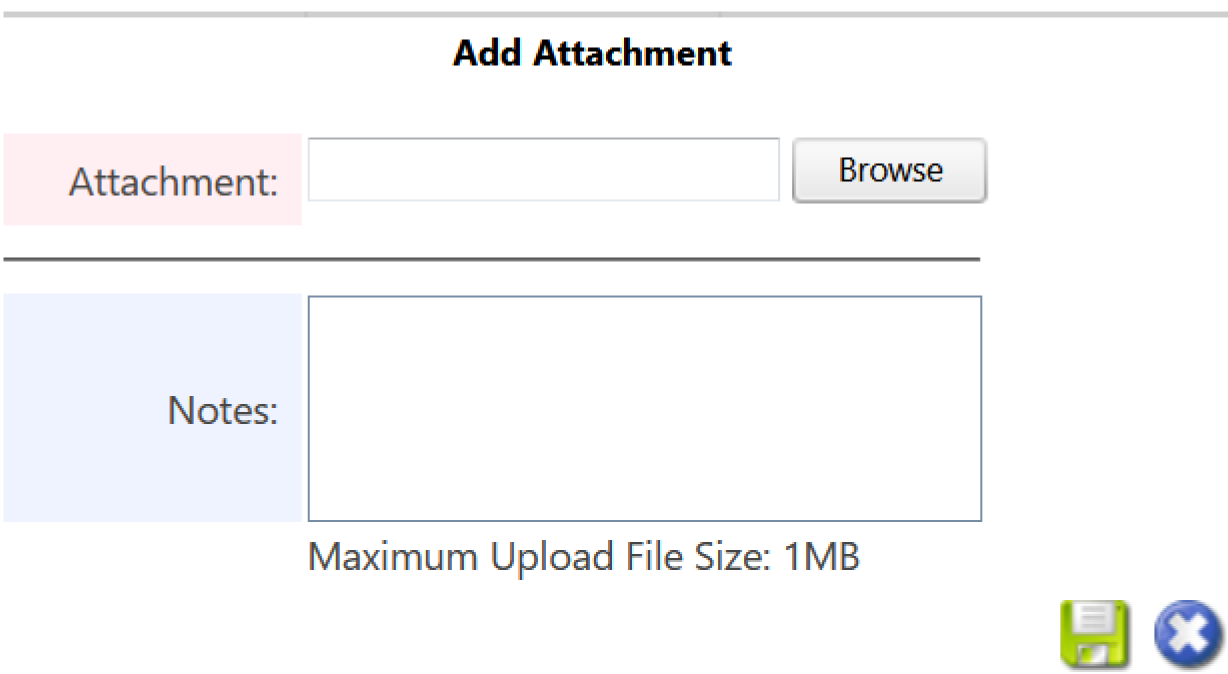
Saving Attachments to Student Records

It is possible to upload documents directly to a student record in Asset Management.

1. On the top navigation bar, click **Student**.
2. Click the name of respective student. The grid expands and displays the Details, Inventory, Charges, and Attachments tabs.
3. Click the **Attachments** tab. The attachments grid displays.



4. Click **Add Attachment**. The Add Attachment window opens.



5. Click **Browse** to locate the respective file. Click on the file name. Files are restricted to a single 1MB or less file.

6. Click **Open** to add the file.
7. Enter respective notes regarding the file in the Notes field. Notes have a 500-character limit restriction.
8. Click **Save**.

Tags

Site Tag Information Reports

"Tag Search" is available in the top navigation bar. It allows a user to search for a specific tag or an item's serial number (a minimum of 3 digits are required), review tag details, and edit tag-specific information. To edit the attributes of a tag, review "Edit a Tag".

Tag Lifecycle Report

This report, in XLS format, provides all events associated with a tag's life within Asset Management. The user filters the tags by "Status History," "Audit History," and "Date Range." This report includes "Event Date," "Event User," "Event Name," "Tag Status," "Tag Site Update," "Tag Location," and "Event Details."

1. Click within the **Tag/Serial** search field, located in the top navigation bar.

2. Enter/scan the tag number (it can be made up of alpha and/or numeric characters).
3. Click on **Search** or press the Enter key on your keyboard. The "Tag Information" window opens and displays the tag details.
4. Click on the **Select Action** drop-down menu, located in the upper right corner of the "Tag Information" window.
5. Select the respective location under the "--- View Report ---" menu subcategory. The "Tag Lifecycle" window or "Tag Lifecycle Report Filter" window opens.
6. Uncheck **Include Status History** and/or **Include Audit History** to remove data. The default is to include status and audit history.
7. Click on **Select Date Range To** to specify the date range. The current date is the default date.

Note: For the "Custom Date" selection, click on the **Calendar Control** icons next to the **Start Date** and **End Date** fields to change the date.

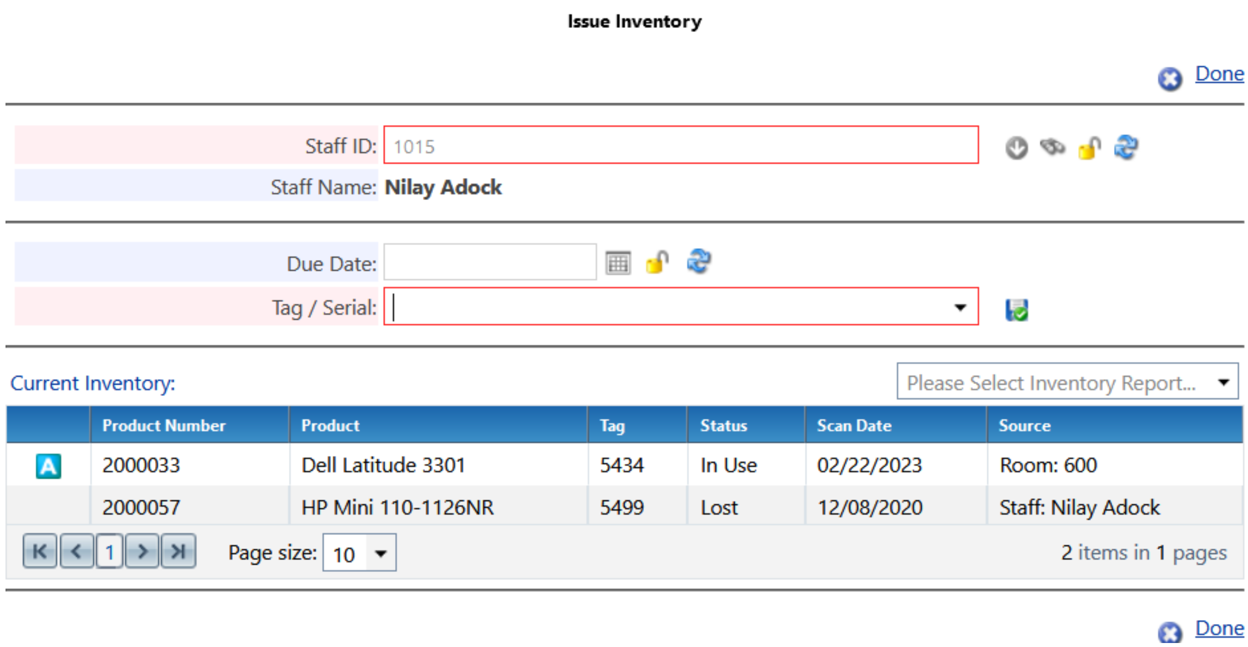
8. Click on **GO**.
9. If prompted "Do you want to open or save LifecycleReport.csv ...", click on **Open**. The "Tag Lifecycle Report" opens within Microsoft Excel.
10. Click on **Close** to close the "Tag Lifecycle Report Filter" window.
11. Click on **Close** to close the "Tag Information" window.

Quick Issue to Staff

This process allows a site to issue an item to a staff member, in the status of In Use.

Quick Issue an Item to a Staff Member

1. In the Site Tools Quick Links menu, click **Issue to Staff**. The Issue Inventory window opens.



2. In the Staff ID field, enter/scan the staff member's ID number. You can also click **Search** to filter for and select the desired staff. If multiple tags are to be issued to the same staff member, select the **Lock/Unlock** next to the Staff ID field. This allows you to scan all tag numbers without entering the same staff member's ID for each tag.

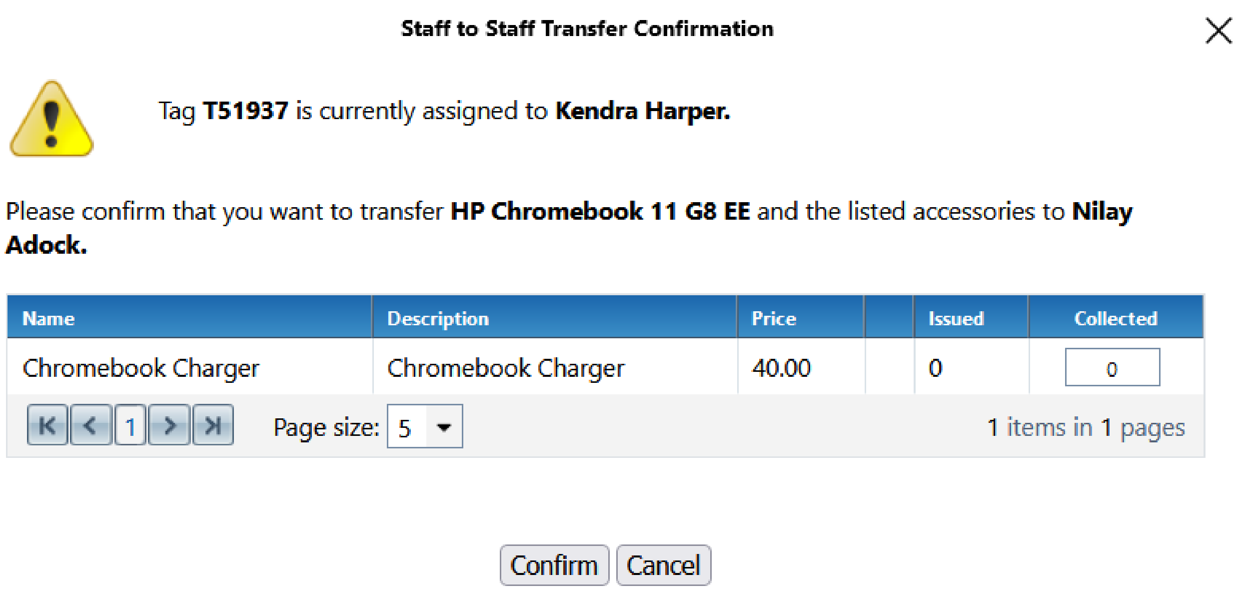
3. In the Due Date field, enter a date, if needed.

   - To select a due date, click the **Open the calendar popup** next to the Due Date field.
   - Click **Lock/Unlock** to secure the date.

4. In the Tag/Serial field, enter/scan the tag number to be issued or the serial number.

5. Click **Save**.

    - The Staff to Staff Transfer Confirmation window will open if the tag is issued to another staff member.



- Review and click **Confirm**.
- This updates the Current Inventory grid (displaying all tags issued to this staff member).

6. To generate a Transaction Receipt and capture a digital signature for this transaction, select **Today's Transaction Receipt** or **Full Transaction Receipt** from the "Please Select Inventory Report" dropdown menu. Today's Transaction Receipt only displays the items which have been issued or collected today. All other items on the staff member's account, including those items issued, transferred, or collected today, are available on the Full Transaction Receipt.

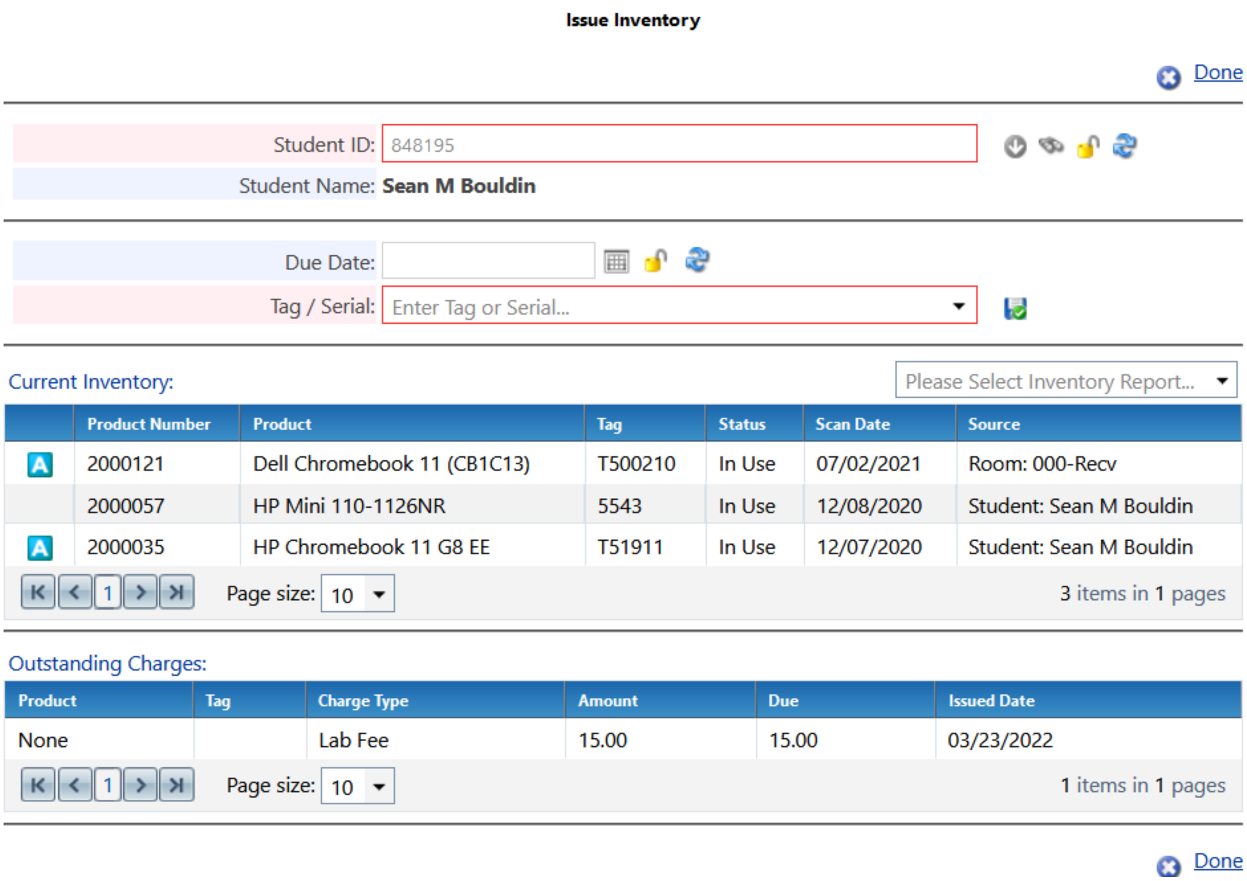
7. Click Done to close the Issue Inventory window.

Note: If the tag(s) issued to the staff member are an Asset Type of Component or Parent, an additional warning screen will display to verify the transaction.

Quick Issue to Students

This process allows a site to issue an item to a student, in the status of "In Use."

1. Click on **Issue to Students**, located in the "Site Tools Quick Links" menu. The "Issue Inventory" window opens.



Issue Inventory

Done

Student ID: 848195
Student Name: **Sean M Bouldin**

Due Date:
Tag / Serial: Enter Tag or Serial...

Current Inventory:

Please Select Inventory Report...

	Product Number	Product	Tag	Status	Scan Date	Source
A	2000121	Dell Chromebook 11 (CB1C13)	T500210	In Use	07/02/2021	Room: 000-Recv
	2000057	HP Mini 110-1126NR	5543	In Use	12/08/2020	Student: Sean M Bouldin
A	2000035	HP Chromebook 11 G8 EE	T51911	In Use	12/07/2020	Student: Sean M Bouldin

1 Page size: 10 — 3 items in 1 pages

Outstanding Charges:

Product	Tag	Charge Type	Amount	Due	Issued Date
None		Lab Fee	15.00	15.00	03/23/2022

1 Page size: 10 — 1 items in 1 pages

Done

2. In the **Student ID** field, enter/scan the student's ID number. If a student ID barcode isn't available to scan, click on **Search** to filter and select the respective student.

3. Click on **Next**.

4. If multiple tags are to be issued to the same student, select the **Lock/Unlock** next to the **Student ID** field. This allows you to scan all tag numbers without entering the same student's ID for each tag.

5. If the student has charge(s), the charge(s) display in the "Outstanding Charges" grid (located below the "Current Inventory" grid).

6. (Optional) In the **Due Date** field, enter a date, if needed. The **Due Date** field is an optional field. When the student ID is entered, the cursor will skip to the **Tag** field.
    1. Click on **Open the calendar popup** next to the **Due Date** field to select a due date.
7. Click on **Lock/Unlock** to secure the date.
8. In the **Tag/Serial** field, enter/scan the tag number to be issued or the serial number.
9. Click on **Save**.
    1. This updates the "Current Inventory" grid (displaying all tags issued to this student).
10. To view a "Transaction Receipt" for this transaction, select **Today's Transaction Receipt** and/or the **Full Transaction Receipt** from the “Please Select Inventory Report” drop-down menu. **Today’s Transaction Receipt** only displays the items that have been issued or collected today. All other items on the student’s account, including those items issued or collected today, are available on the **Full Transaction Receipt**.
11. Click on **Done** to close the "Issue Inventory" window.

Note: If the tag(s) issued to the student are an "Asset Type" of "Component" or "Parent," an additional warning screen will display to verify the transaction.

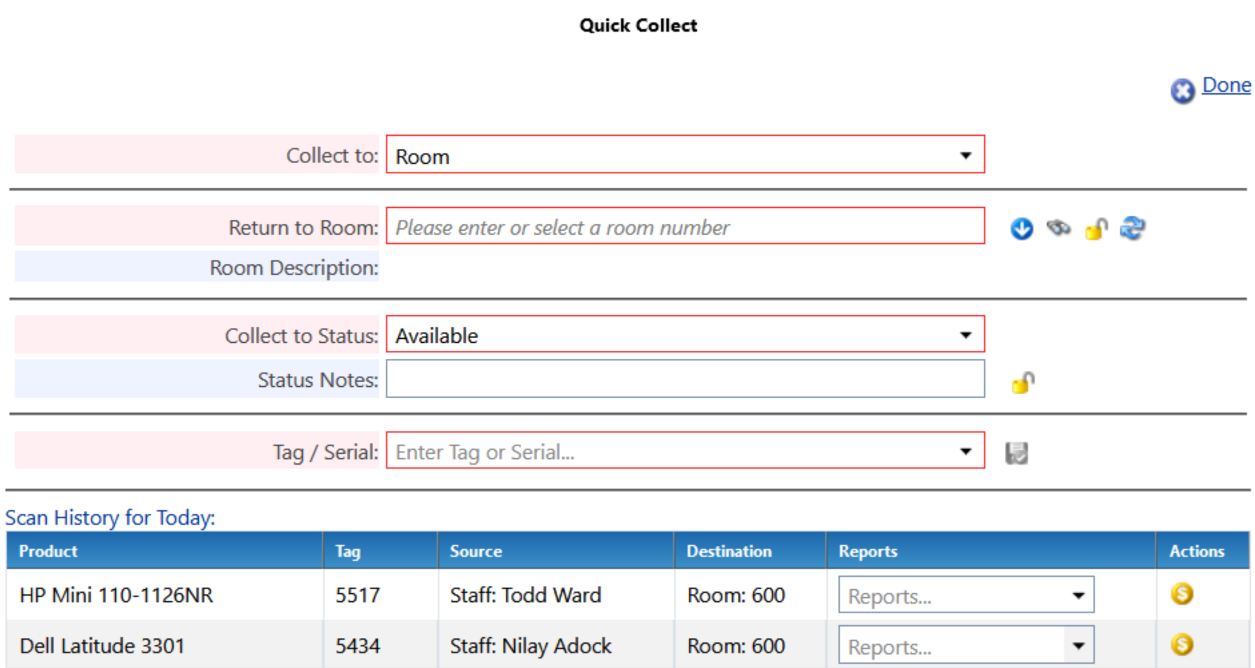
Quick Collect Assets

The "Quick Collect" process allows a user to quickly collect an asset that has been issued to a "Staff" member or "Student" to a room, transfer, or new status.

Quick Collect to a Room

Collecting an asset to a room is allowed only if the asset is currently issued to a staff or student. If the asset is already in a room in the "Available" status, the asset is blocked from collection and a validation error will notify the user: "Cannot Quick Collect this Tag. This Tag is Available in Room: 1234."

1. Click on **Quick Collect**, located in the "Site Tools Quick Links" menu. The "Quick Collect" window opens.



2. Select **Room** from the "Collect" to drop-down menu.
3. In the **Site Name** field (not available in "Site View"), enter the site where the asset is located.
    - If the asset has a restricted funding source, the asset will be blocked from collection and a validation notifies the user of the restricted funding source: "Invalid Tag Number; This tag requires restricted funding source approval."

4. In the **Return to Room** field, enter the room number where this tag will be collected and click on **Next**. OR, click on **Search** and select the respective room.
   - If multiple tags are to be collected to the same room, select **Lock/Unlock** next to the "Return to Room" field. This allows you to scan the tag numbers without entering the room number for each tag.
5. Enter the desired status in the **Collect to Status** drop-down menu.
6. (Optional) Enter notes regarding tag status in the **Status Notes** field.
   - Click on **Lock/Unlock** to secure.
7. Enter/scan the tag number in the **Tag** field.
8. Click on **Save**.
9. Accessories to be collected for this tag display in the "Collect Accessories" grid.
   - If needed, edit the **Collected Quantity** for the respective accessory.
   - During the accessory collection process, if an accessory that has the "Missing Charge" setting enabled, is not returned, a charge will be assessed to the staff/student member, based on the price designated for the accessory. The charge will be viewable under the staff/student record.
   - Click on **Collect Accessories** to collect the tag and respective accessories.
10. The collection history displays in the bottom grid. It displays all tags collected today.
11. To generate a "Collection Receipt" and capture a digital signature, select the **Full Collection Receipt** from the "Reports…" drop-down menu.
12. To assess a charge to associated to the collected tag and staff member account, click on **Assess Charge**, located under the "Actions" column in the "Scan History for Today" grid.
13. Click on **Done** to close the "Quick Collect" window.

Quick Collect to a Status Change

1. Click on **Quick Collect**, located in the "Site Tools Quick Links" menu. The "Quick Collect" window opens.
2. Select **Room** from the "Collect" to drop-down menu.
3. In the **Site Name** field (not available in "Site View"), enter the site where the asset is located.
   - If the asset has a restricted funding source, the asset will be blocked from collection and a validation notifies the user of the restricted funding source: "Invalid Tag Number; This tag requires restricted funding source approval."
4. In the **Return to Room** field, verify the room number where this tag will be collected.
5. To edit the room, click on **Lock/Unlock** to unlock the field. OR, click on **Search** and select the respective room.
   - If the asset is already in a room in the "Available" status, the asset is blocked from collection and a validation error will notify the user: "Cannot Quick Collect this Tag. This Tag is Available in Room: 1234".
6. Select the tag status from the **Collect** to Status drop-down menu.
7. (Optional) Enter notes regarding tag status in the **Status Notes** field. Click on **Lock/Unlock** to secure.
8. Enter/scan the tag number in the **Tag** field. The tag information populates.
9. Click on **Save**.
10. Accessories to be collected for this tag display in the "Collect Accessories" grid.
    - If needed, edit the **Collected Quantity** for the respective accessory.
    - During the accessory collection process, if an accessory that has the "Missing Charge" setting enabled, is not returned, a charge will be assessed to the staff/student member, based on the price designated for the accessory. The charge will be viewable under the staff/student record.

- Click on **Collect Accessories** to collect the tag and respective accessories.

11. The collection history displays in the bottom grid. It displays all tags collected today.

12. To generate a "Collection Receipt" and capture a digital signature, select the **Full Collection Receipt** from the "Reports…" dropdown menu

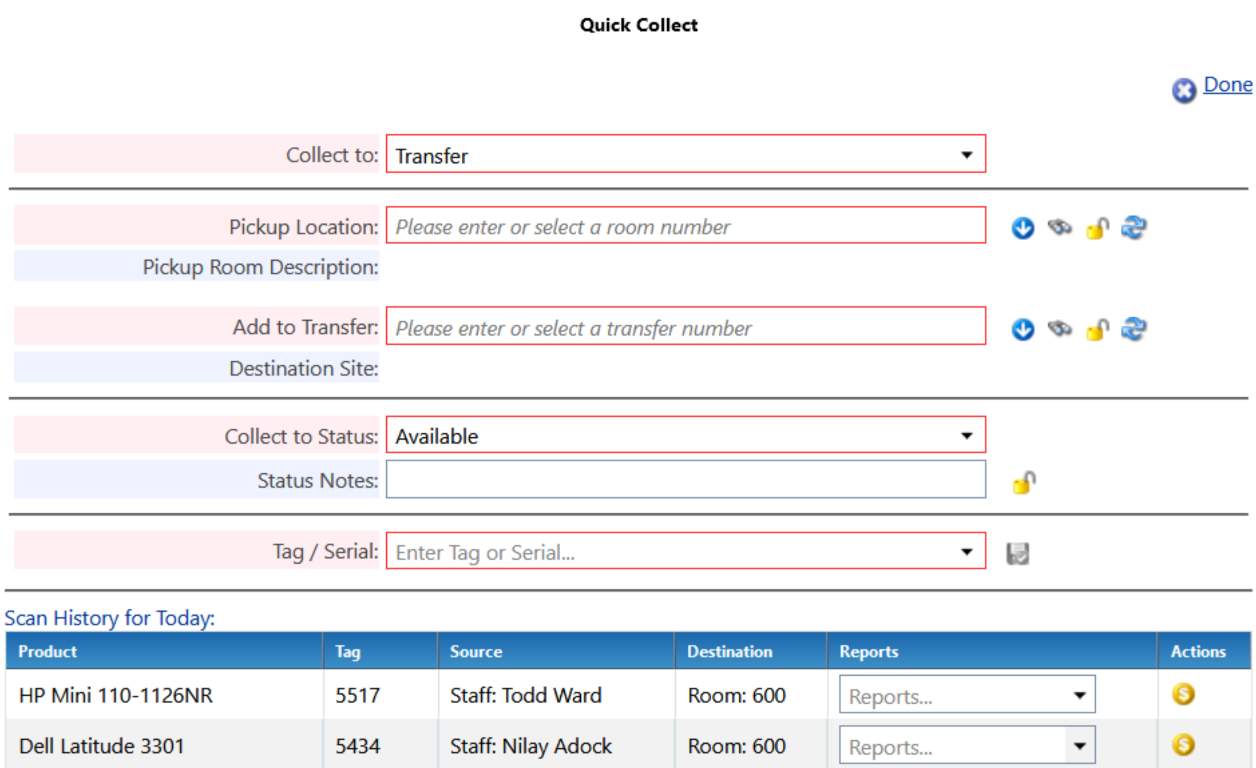
13. To assess a charge to associated to the collected tag and staff member account, click on **Assess Charge**, located under the "Actions" column in the "Scan History for Today" grid.

14. Click on **Done** to close the "Quick Collect" window.

Quick Collect to a Transfer

Only use this function to an existing transfer for disposal.

1. Click on **Quick Collect**, located in the "Site Tools Quick Links" menu. The "Quick Collect" window opens.



2. Select **Transfer** from the "Collect" to drop-down menu.
3. In the **Site Name** field (not available in "Site View"), enter the site the asset is located.
    - Selecting a site will transfer the asset to the site chosen if the asset is not already at that site location.
4. In the "Pickup Location" field, verify the room number where this tag will be collected.
5. To edit the room, click on **Lock/Unlock** to unlock the field. OR, click on **Search** and select the respective room.
6. Click on **Search** next to the "Add to Transfer" field.
    - If the transfer does not exist, select a destination from the **Destination** drop-down menu, located in the "Create a New Transfer" field. Click **Create New Transfer**.
    - To use an existing transfer, select the transfer from the "Search for an Existing Transfer" grid.
7. Select the tag status from the **Collect to Status** drop-down menu.
    - If the asset is already in a room in the "Available" status, the asset is blocked from collection and a validation error will notify the user: "Cannot Quick Collect this Tag. This Tag is Available in Room: 1234."
8. (Optional) Enter notes regarding tag status in the **Status Notes** field.
    - Click on **Lock/Unlock** to secure.
9. Enter/scan the tag number in the **Tag** field. The tag information populates.
10. Accessories to be collected for this tag display in the "Collect Accessories" grid. Edit the **Collected Quantity** for the respective accessory.
11. Click on **Save**.
12. Accessories to be collected for this tag display in the "Collect Accessories" grid.
    - If needed, edit the **Collected Quantity** for the respective accessory.

- During the accessory collection process, if an accessory that has the "Missing Charge" setting enabled, is not returned, a charge will be assessed to the staff/student member, based on the price designated for the accessory. The charge will be viewable under the staff/student record.
- Click on **Collect Accessories** to collect the tag and respective accessories.

13. The collection history displays in the bottom grid. It displays all tags collected today.
14. To generate a "Collection Receipt" and capture a digital signature, select the **Full Collection Receipt** from the "Reports…" dropdown menu
15. To assess a charge to associated to the collected tag and staff member account, click on **Assess Charge**, located under the "Actions" column in the "Scan History for Today" grid.
16. Click on **Done** to close the "Quick Collect" window.

Edit a Tag

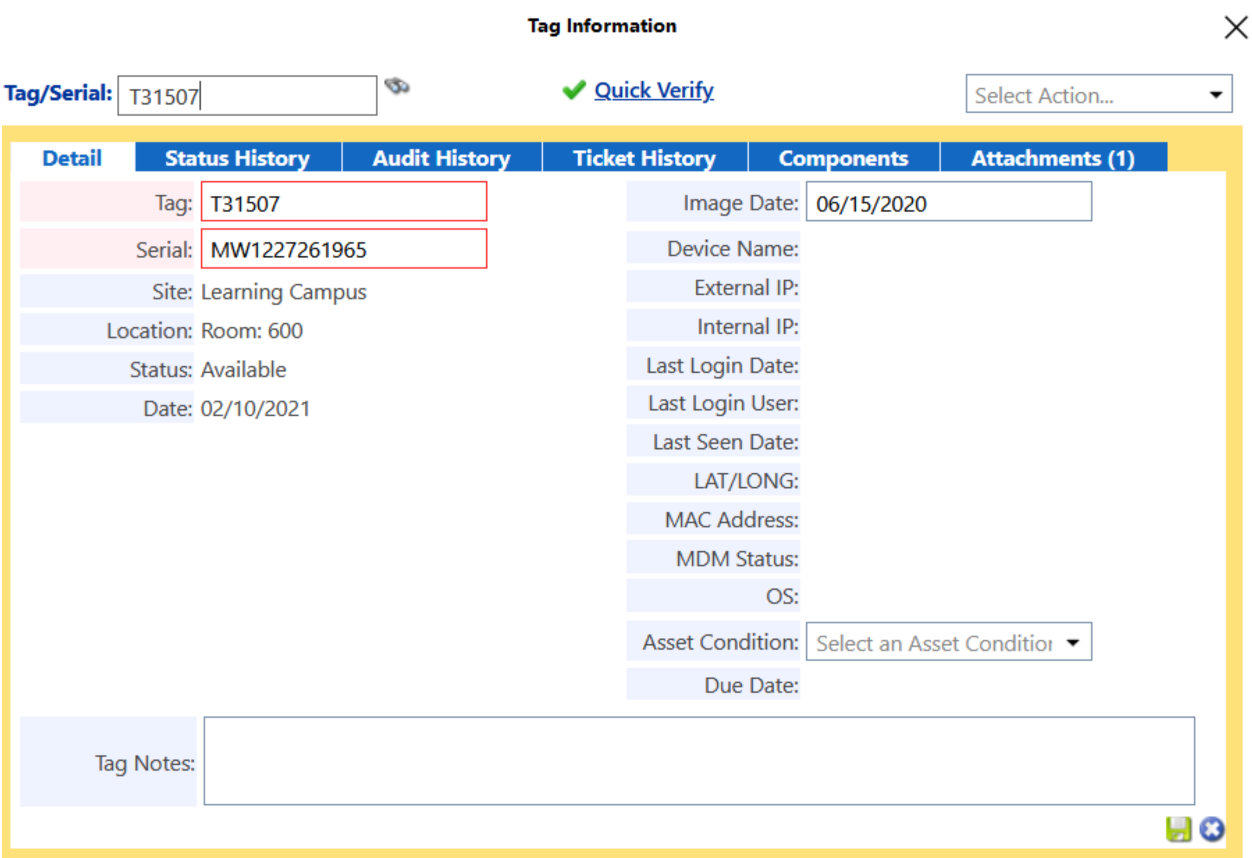
Tag Search is available in the top navigation bar. It allows a user to search for a specific tag or an item's serial number (a minimum of 3 digits are required), review tag details, and edit tag-specific information. To change the status of a tag, review "Update Tag Location and Status".

Edit a Tag's Details

Administrative-level users and site administrators can edit a small number of fields associated with the tag (including the tag number, serial number, tag notes, and custom fields, if they apply). They must be logged into the site where the tag is located to edit the tag's information.

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

2. Enter/scan the tag number (it can be made up of alpha and/or numeric characters).
3. Click on **Search** or press the **Enter** key on your keyboard. The "Tag Information" window opens and displays the tag details.



4. Click on **Edit**, located below and to the right of the "Tag Notes" field. Edit the **Tag**, **Serial**, **Tag Notes**, **Asset Condition**, **Due Date**, and any additional custom fields (required fields are red). "Due Dates" apply only to inventory assigned to a student or staff member. When the **Due Date** is equal to today's date, a small alert icon is placed next to the date. When the **Due Date** is past due, the text will turn red. Changes are logged for this tag in the "Tag Lifecyle Report."
5. Click on **Update**.
6. Click on **Close** to close the "Tag Information" window.

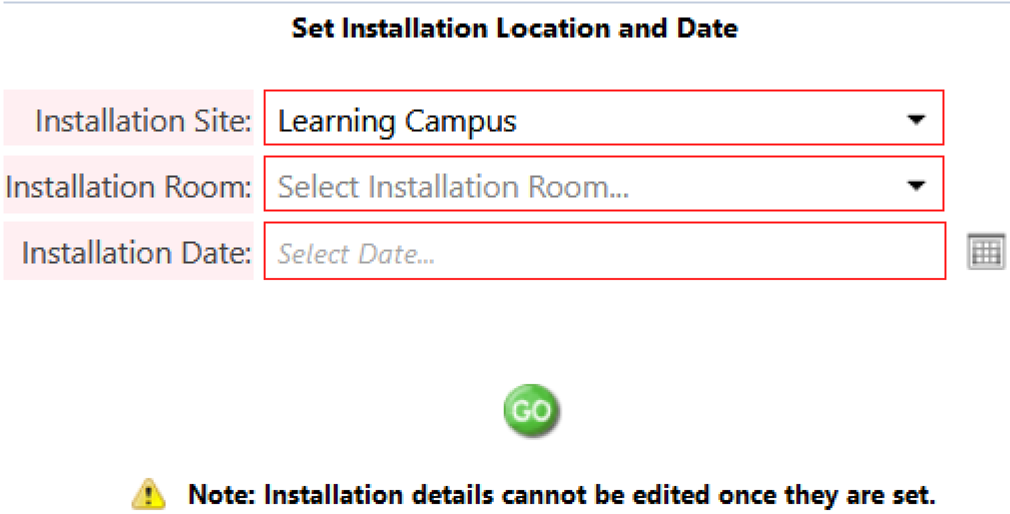
Update Tag Location or Status

"Tag Search" is available in the top navigation bar. It allows a user to search for a specific tag or an item's serial number (a minimum of 3 digits are required), review tag details, and edit tag-specific information. To edit the attributes of a tag, review "Edit a Tag".

Set Tag Installation Information for a Single Tag

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

5. Enter/scan the tag number (it can be made up of alpha and/or numeric characters).
6. Click on **Search** or press the **Enter** key on your keyboard. The "Tag Information" window opens and displays the tag details.
7. Click on **Set Installation Data**, located in the "Installation Information" section.



8. Edit the **Installation Site**, **Installation Room**, and **Installation Date** (required fields are red).
9. Click on **Go**.
10. Click on **Close** to close the "Tag Information" window.

Change Tag Location

If a tag is located in a room at the user's site and has a status of "Available," the tag can be issued to a staff member, student, or room from the "Tag Information" window.

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

2. Enter/scan the tag number (it can be made up of alpha and/or numeric characters).
3. Click on **Search** or press the **Enter** key on your keyboard. The "Tag Information" window opens and displays the tag details.
4. Click on the **Select Action** drop-down menu, located in the upper right corner of the "Tag Information" window.
5. Select the respective location under the "--- Change Location ---" menu subcategory. The "Issue Inventory" window or "Room to Room" window opens.
6. Enter/scan the **Student** or **Staff ID** (when issuing tag to student or staff).
    1. Click on the **Calendar Control** (open the calendar popup) to set the **Due Date**.
7. Enter/scan the **Room** (when completing a "Room" transfer).
    1. For a room transfer, select **Use Previous Tag Status**, or deselect and use the drop-down menu to designate new status.
8. The tag is not automatically issued. Click on **Save** to issue the tag.
9. Click on **Done**.
10. Click on **Close** to close the "Tag Information" window.

Change Tag Status

A user must be logged into the site where the tag is located to edit the tag's status.

If required, a user must add the "Police Record #" and "Attachment" when changing the status to "Lost" or "Stolen."

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

2. Enter/scan the tag number (it can be made up of alpha and/or numeric characters).
3. Click on **Search** or press the **Enter** key on your keyboard. The "Tag Information" window opens and displays the tag details.
4. Click on the **Select Action** drop-down menu, located in the upper right corner of the "Tag Information" window.
5. Select the respective status under the "--- Change Status ---" menu subcategory. The "Change Status" window opens.
6. Enter/scan the sale price in the **Sale Price** field if the tag status is changed to "Sold" or "Auctioned."
7. (Optional) Enter notes related to status change in the **Status Notes** field.
8. The tag is not automatically issued. Click on **Save** to issue the tag.
9. Click on **GO**.
10. Click on **Close** to close the "Tag Information" window.

Delete a Tag

A user must be logged into the site where the tag is located to delete a tag.

Criteria must be met to delete a tag, including source of "Initial," asset type of "Standalone" or "Component," located in a "Room," and no "Audit" or "Transfer" history.

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

2. Enter/scan the tag number (it can be made up of alpha and/or numeric characters).
3. Click on **Search** or press the **Enter** key on your keyboard. The "Tag Information" window opens and displays the tag details.
4. Click on the **Select Action** drop-down menu, located in the upper right corner of the "Tag Information" window.
5. Select the status **Delete** under the "--- Administrative ---" menu subcategory. The "Delete Tag" window opens.
6. Verify the tag to be deleted. Click **Confirm**. The "Tag Information" window closes.

Tag Export

The Tag Export file is accessible by any user logged in with Administrative or Site View permissions. The user must navigate to each site individually to run this export, the export is not available in a Warehouse.

The Tag Export, in CSV format, is a complete listing of the tags within Asset Management respective to site views. It has detailed information regarding each tag, including:

Where each Tag is located:

Site Name & Site ID	Grade
Location Description, Location ID, & Location Type	Email
Room Description	Parent Email
Region	Transfer Number
Facility ID	

What kind of item each Tag is tracking:

Product Name & Product Number	Manufacturer
Product Type	3 possible Product Other Fields' information

Product Description	Suggested Price
Model	Model End of Life
SKU	

Each Tag's specific information:

Tag Number	Serial Required
Active or Inactive	Parent Tag Destination
Asset Type (Standalone, Parent, or Component)	Tag Notes
Status o Department Assigned (if Department feature enable)	Due Date
4 possible Tag Custom Fields' information	RFID
Last Scan Date & Last Scan By	Asset Condition
Last Audit Scan Date & Last Audit Scan By	Police Report #

Projected Life	Last Audit Date
Expiration Date	Last Audit By
Serial Number	Staff Status
Asset UID	Installation Site, Installation Room, and Installation Date
Area	

Each tag's inventory & funding history:

Source (Initial or Order)	FRN
Order Number, if applicable	State Funding %
Funding Source	Federal Funding %
Account Code	Invoice Date
Vendor, if applicable	Invoice Number

Purchase Price & Purchase Date

Mobile Device Management Integrated Fields: (if applicable)

Device Name	Internal IP
Last Login Date	LAT/LONG
Last Login User	MAC Address
Last Seen Date	MDM Status
External IP	OS

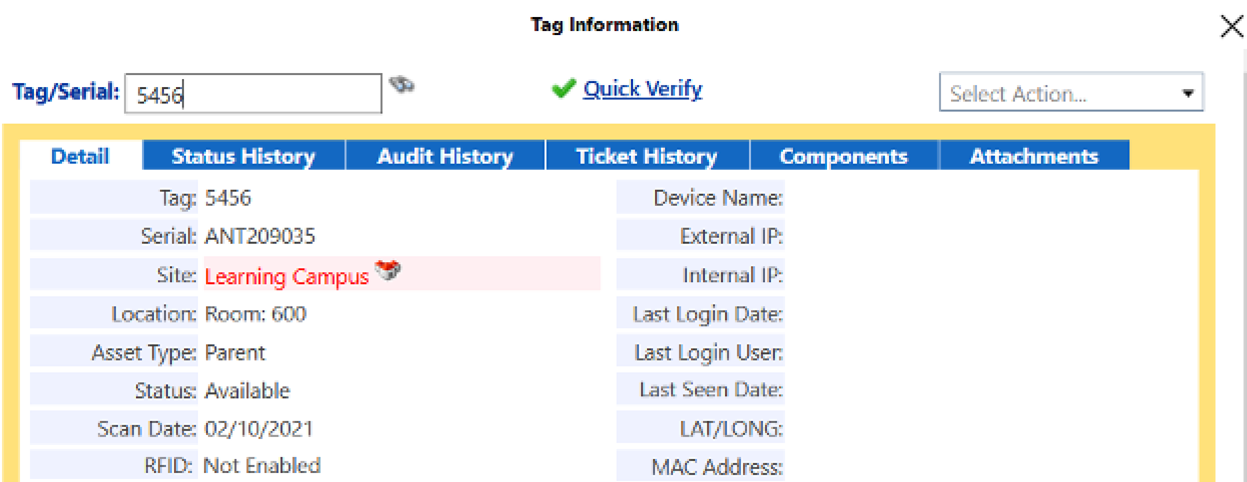
Export the Tag Export File

1. In the Site Tools Quick Links menu, click on **Tag Export**.
2. The following message displays: "Tag Export will take several minutes to generate and cannot be selected again until it is complete. Please click on 'OK' to proceed". Click **OK**.
3. If prompted "Do you want to open or save TagExport.csv…", click on **Open**. The Tag Export file opens within Microsoft Excel.

Parent and Components Overview

"Components" allows one or more existing tags (such as a Chromebook) to be assigned to another existing tag (such as a charging cart) by adding the tags into the **Components** tab in the "Tag Information" window. Once the relationship is established, the edited tag becomes the "Parent" and the associated tags become "Components." This allows all tags to move throughout the district, as a group, by only moving the parent tag. Examples include laptops in a laptop cart or a mobile workstation with various technology items.

Asset Types



There are three "Asset Types" within the Asset Management system. The "Asset Type" of an asset indicates whether the asset will be managed (moves and status changes) in a group or as one asset.

- **Standalone** – This is the default asset type for every asset added to your database. Standalone assets are managed on a one-to-one basis.
- **Parent** – When other assets are associated with an asset, it becomes a parent
- **Component** – When an asset is associated with another asset, it becomes a component

Components reflect the current tag status of their parent.

As a parent is moved throughout the district, the components move with the parent.

- Room-to-Room Transfers

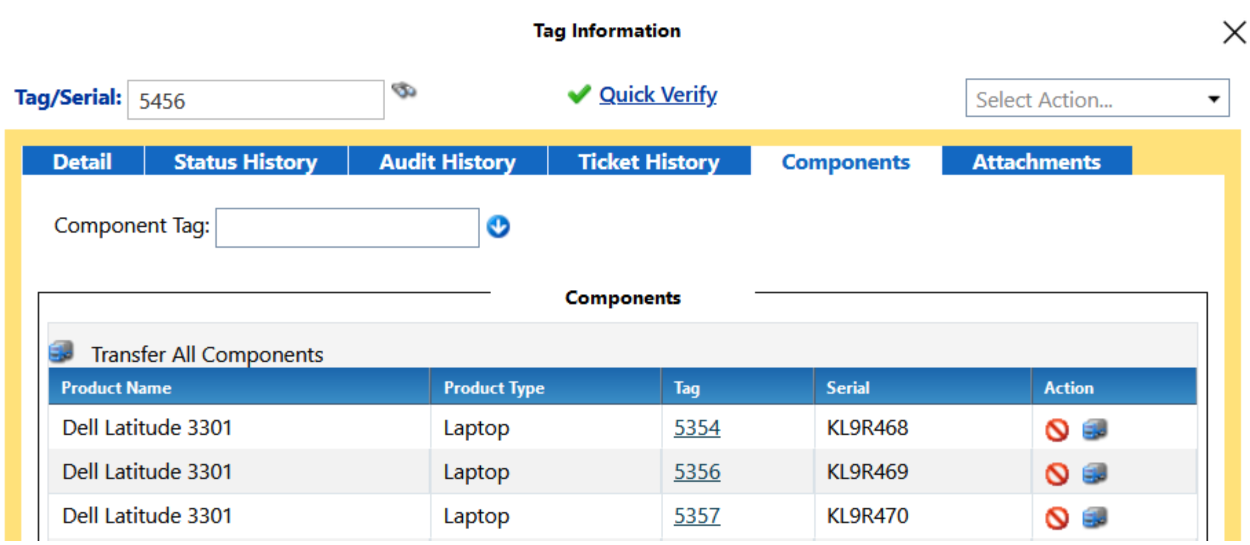
- Issuing to Staff
- Issuing to Students
- Site-to-Site Transfers

For each of the actions listed above, a warning screen displays the parent's respective components. This allows the removal of one or more components from the assigned parent.

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

Assigning 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. Click within the **Tag/Serial Search** field, located in the top navigation bar.

2. Enter/scan the tag number of the intended "Parent" tag (it can be made up of alpha and/or numeric characters).

3. Click on **Begin Search** or press the **Enter** key on your keyboard. The "Tag Information" window opens and displays the tag details.
4. Click on the **Components** tab.
5. Enter the intended component in the **Component Tag** field. (If a scanner is not being used, click on .) The tag is displayed in the "Components" grid.

Transfer a Component to Another Tag/Parent

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

2. Enter/scan the tag number of the "Parent" tag (it can be made up of alpha and/or numeric characters).
3. Click on **Search** or press the **Enter** key on your keyboard. The "Tag Information" window opens and displays the tag details.
4. Click on the **Components** tab.
5. Locate the tag to transfer from the parent in the "Components" grid.
6. Click on **Transfer Component**, located in the respective tag's row. The "Transfer Component" window opens.
7. 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.
8. Click on GO **GO** to complete the transfer. A success statement displays.
9. Click **OK**. The window updates and the tag is no longer listed as a component of the parent.

Transfer All Components to Another Tag/Parent

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

2. Enter/scan the tag number of the Parent tag (it can be made up of alpha and/or numeric characters).
3. Click on **Search** or press the ∫ key on your keyboard. The "Tag Information" window opens and displays the tag details.
4. Click on the **Components** tab.
5. Verify the desired tags (to transfer from this parent) in the "Components" grid.
6. Click on **Transfer All Components**, located above the blue grid header. The "Transfer Component" window opens.
7. 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.
8. Click on **GO** to complete the transfer. A success statement displays.
9. Click **OK**. The window updates and the tag is no longer listed as a component of the parent.

Remove Component from Parent

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

2. Enter/scan the tag number of the "Parent" tag (it can be made up of alpha and/or numeric characters).
3. Click on **Search** or press the **Enter** key on your keyboard. The "Tag Information" window opens and displays the tag details.
4. Click on the **Components** tab.
5. Locate the tag to remove from the parent in the "Components" grid.

6. Click on **Remove as Component**, located in the respective tag's row. The window updates and the tag is no longer listed as a component of the parent.

Remove Parent from Component

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

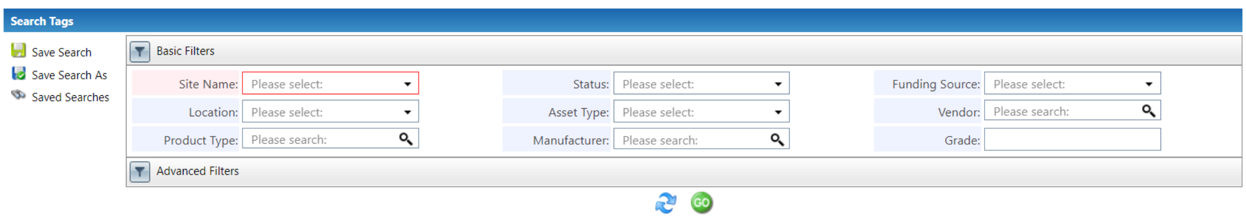
2. Enter/scan the tag number of the "Component" tag (it can be made up of alpha and/or numeric characters).
3. Click on **Search** or press the **Enter** key on your keyboard. The "Tag Information" window opens and displays the tag details.
4. Click on the **Components** tab.
5. Click on **Remove as Component**, located at the bottom left-hand corner.

Note: When "Departments" are enabled, to associate a component to a parent, the user must have access to the department of the parent and the department of the component.

Tags Grid Overview

The “Tags” grid, located on the top navigation bar, allows an administrator or site view user to search, view, share reports, and print tags within the Asset Management application. Administrative and user-level users can also use the “Tags” grid to transfer assets or make bulk edits for select fields if given the corresponding permissions.

Tags Functionality



The “Search Tags” section of the “Tags” grid allows Administrative View users to save search criteria and column settings for custom searches and reporting utilizing “Basic Filters” and “Advanced Filters.”

- **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.
- **Basic Filters** - located at the top of the “Tags” grid, allows the user to search for specific tag information using the following:
    - **Site Name** – name of the site/location as defined by the district. This field is a required filter and available in the Administrative View Tags Grid only as all searches in the Site View Tags Grid are automatically filtered to the current site.
    - **Location** – includes Rooms, Staff, Students, and Transfer.
    - **Product Type** – description of the different types or groups of products (such as laptops, calculators, printers, cell phones, 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 source of financial resources used to purchase an item.
- **Vendor** - the name of an individual or a company who provides/supplies products to your district.

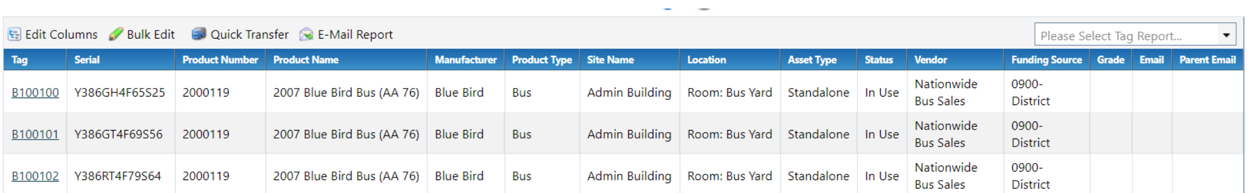
- **Advanced Filters -** located at the top of the "Tags" grid, allows the user to search for specific tag information using the following:
    - **Tag** – the unique identifier which is used to track items within Asset Management (may be an asset tag).
    - **Serial** – if required by the district, a serial number which was recorded when the tag was issued for a product.
    - **Asset UID** – is available for customers with an asset integration setup (paid add-on to Asset Management) and displays the unique asset number brought into Asset Management from the district's integration files (usually sourced from the district's financial or fixed asset system).
    - **Product Number** – an auto-generated field; however, the district-level administrative user has the option to enter their own product number.
    - **Product Name** – the name of the product.
    - **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 laptops, calculators, printers, cell phones, etc.).

- **Other #1, Other #2, and 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 management system's site ID numbers.
- **SKU** – defined by a retailer's coding system to distinguish individual products within the respective retailer's point-of-sale system.
- **Site Name** – name the site/location goes by.
- **Location ID** – an alpha and/or numeric number which corresponds 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 respective “Room Type” or “Staff Type.”
- **Asset Type** – displays “Standalone,” “Parent,” or “Component” (respective to the tag and if it has a current component relationship established).
- **Parent Tag** – displays the tag number of the parent tag the component tag is assigned (respective to the tag and if it has a current component relationship established).
- **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 Condition –** displays the condition of the asset as defined in the “Asset Condition" table
- **Destination** - for tags in the status of “In Transit”, this field displays the site name responsible for receiving the tag once it arrives.
- **Status Notes** – displays any entered notes entered at the time of a status change.

- **Custom Tag Field 1, Custom Tag Field 2, Custom Tag Field 3, and Custom Tag Field 4** – custom fields created by a district administrative user and applied to the "Product Type."
- **Tag Notes -** displays any entered notes.
- **RFID –** displays "Enabled" or "Not Found" for customers with RFID (paid add-on to Asset. Management) to indicate which tags have been associated with an EPC (for districts that do not have this paid RFID add-on, the field displays Not Enabled).
- **Department –** displays the department assigned to the tag (only for Customers with the "Departments Feature" installed).
- **Due Date -** date the tag must be returned to the site.
- **Source –** the source of the tagged inventory item: "Initial" (item was initialized), or "Order" (item was received from a purchase order).
- **Order Number** – an alpha and/or numeric purchase order number.
- **Funding Source** – the source of financial resources used to purchase an item.
- **Purchase Price** – amount entered by the district level administrator 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 it is also used to calculate the item's expiration date (may be the date the item's warranty goes into effect).
- **Vendor** – the name of an individual or a company who provides/supplies products to your district (like a supplier).
- **Account Code** - an alpha and/or numeric code indicating a district-specific financial tracking number.
- **Projected Life** - number of years the administrative level predicts this product is deemed to be usable.

  - **Expiration Date** - is calculated by increasing the "Purchase Date" by the district's predicted Projected Life in the number of years.
  - **Last Scan By** - the Asset Management username 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 Management.
  - **Last Audit Scan Date** - The last date on which the tag was scanned on an audit.
  - **Last Audit Scan By** - The name of the user who performed the last audit scan.
  - **Room Description** - the name of the room (such as Principal's Office, Library, Chemistry Lab, etc.).
  - **Facility ID** - the internal number assigned to a facility.
- **Refresh –** refreshes and returns the "Tags" grid filters and search results grid to their original states.
- **Go -** applies the filter settings ("Basic Filters" and "Advanced Filters").

Filter Results Grid


Edit Columns Bulk Edit Quick Transfer E-Mail Report Please Select Tag Report...

Tag	Serial	Product Number	Product Name	Manufacturer	Product Type	Site Name	Location	Asset Type	Status	Vendor	Funding Source	Grade	Email	Parent Email
B100100	Y386GH4F65S25	2000119	2007 Blue Bird Bus (AA 76)	Blue Bird	Bus	Admin Building	Room: Bus Yard	Standalone	In Use	Nationwide Bus Sales	0900-District			
B100101	Y386GT4F69S56	2000119	2007 Blue Bird Bus (AA 76)	Blue Bird	Bus	Admin Building	Room: Bus Yard	Standalone	In Use	Nationwide Bus Sales	0900-District			
B100102	Y386RT4F79S64	2000119	2007 Blue Bird Bus (AA 76)	Blue Bird	Bus	Admin Building	Room: Bus Yard	Standalone	In Use	Nationwide Bus Sales	0900-District			

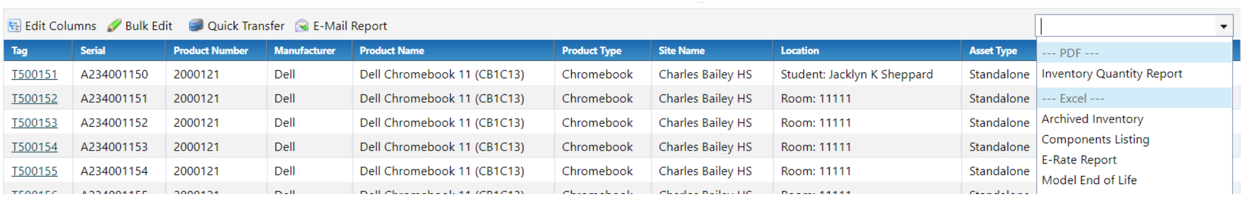
The filter results section of the "Tags" grid is directly below the "Refresh" and "Go" icons and displays the result of filters applied in the basic and/or advanced searches.

- **Edit Columns** - located at the top left of the filter results grid, allows a district administrative user to manipulate the columns included in the search results by adding or removing Asset Management data fields.

- **Bulk Edit** – located at the top of the filter results grid, allows a district administrative user to edit multiple tags at once regarding the following fields.
    - **Asset Condition** – displays the condition of the asset as defined in the "Asset Condition" table.
    - **Custom Field** – special field created by user denoting specific information for a tag.
    - **Due Date** – date the tag must be returned to the site.
    - **Funding Source** – the source of financial resources used to purchase an item.
    - **Installation Info** – the location (site and room) of a tag, and the date the tag is received at that location.
    - **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 district level administrator when adding the product to the respective purchase order (may be different than the product's suggested price).
    - **Status** – status of the tag.
- **Quick Transfer** – located at the top of the filter results 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" grid 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" grid filters to select the desired tags.
- **E-Mail Report** - located at the top of the filter results grid, allows users to e-mail the latest copy of the Tag Listing report to specified users.

- **Moving Columns** - data fields displayed in the filter results grid can be repositioned by dragging the desired column to a new location with the grid.

Tags Reports



The "Tags" grid provides reports to be viewed/printed. These reports can be accessed by clicking the dropdown box in the upper right corner of the filter results grid. Filtered results will be displayed within the respective report except for the "Archived Inventory Report" and the "Room Audit Detail" reports.

- **Inventory Quantity Report** – displays in PDF format, lists total quantities of tags based on criteria defined by the user.
- **Archived Inventory** - downloads, in .CSV format, tags within Asset Management that have been archived, including detailed information regarding each tag (archive date, archive notes, and the district administrative user who performed the respective archive process).
- **Components Listing** - downloads, in .CSV format, a listing of all current component tags and parent tags within the district.
- **E-Rate Report** – downloads, in .CSV format, a list of the tags displayed in the Tags Grid and their respective ERate related data such as FRN, State Funding %, Federal Funding %, Invoice Number, Invoice Date, Delivery and Installation Site, and Date.
- **Model End of Life** – downloads, in .CSV format, a list of the tags displayed in the Tags Grid and their respective data relating to Model end of life, Approaching the end of life, and Past end of life.
- **Room Audit Detail Report** - downloads, in .CSV format, tags and their respective audit state for room audit(s) within a respective campus.

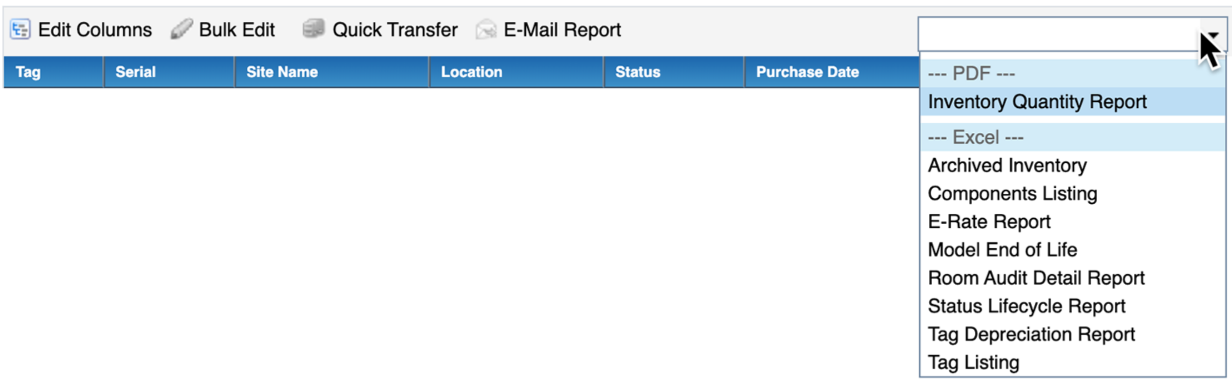
- **Status Lifecycle Report** - downloads, in .CSV format, a list of the tags displayed (within the Tags grid) every time each tag was in a particular status (user selects the desired Status and Date Range within the Status Lifecycle Report window).
- **Tag Depreciation Report** - displays, in .CSV format, information related to the value of tags as determined by select filters and provides the depreciation value of the tags. (When creating a "Tag Depreciation Report", annual depreciation and depreciated value are calculated only when the purchase price, purchase date, and projected life of a tag are available.)

Tag Listing - downloads, in .CSV format, the columns, and tags displayed within the filter results grid.

Running Tags Reports

The "Tags" grid, located in the top navigation bar, allows admin view or site view users with "Tags" grid permission to search, view, and/or print reports respective to the selected filters. The administrative view user will be able to search all assets in the district, whereas a site view user can search for assets at their respective site.

> Except for the "Archived Inventory Report," assets must be listed in the filter results grid to be included in the report.

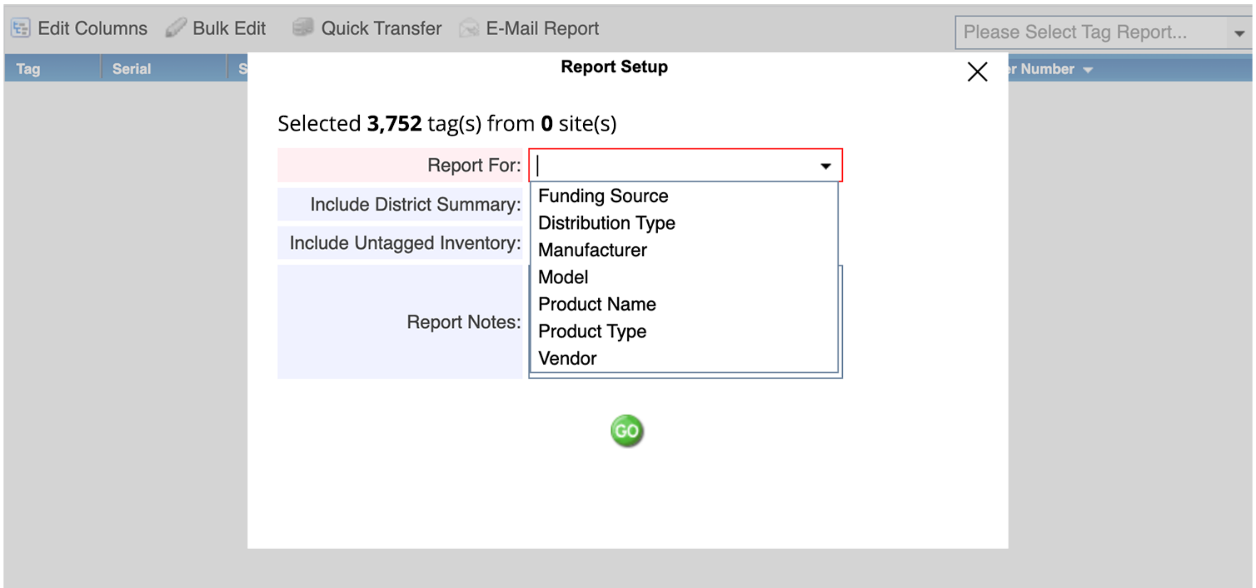


Inventory Quantity Report

This report, in PDF format, provides inventory quantities respective to the selected filters. Report options include "Funding Source," "Distribution Type," "Manufacturer," "Model," "Product Name," "Product Type," and "Vendor."

1. Click on **Tags**, located in the top navigation bar.
2. Filter the "Tags" grid, using the **Basic Filters** and/or **Advanced Filters** feature, for the respective tag information.
3. Click on **Apply Filters**.
4. Click the **Please Select Tag Report** drop-down menu, located above the blue grid header.
5. Select **Inventory Quantity Report** under the "--- PDF ---" menu subcategory. The "Report Setup" window opens.

6. Select the report option from the **Report For** drop-down menu. The report will be organized by the field chosen in this step and location of the assets in the filter results grid.



7. (Optional) Select **Include District Summary**. This option will include a one-page summary of all assets in the filter results grid.

8. (Optional) Select **Include Untagged Inventory**. This option will include a quantity for both tagged and untagged inventory items.

9. (Optional) Enter notes in **Report Notes** box. Text placed in the "Report Notes" box will appear at the top of each page in the report.

10. Click on GO **GO**. The "Inventory Quantity Report" opens in PDF format.

Archived Inventory Report

This report, in CSV format, provides a detailed list of archived tags. The "Archived Inventory Report" will list all archived tags and ignore the tags that are in the filter results grid. The report includes "Archive Date," "Archive By," "Archive Notes," "Tag," "Serial," "Product Number," "Product Name," "Manufacturer," "Model," "Product Type," "Other" fields (1, 2, and 3), "Suggested Price," "Site ID," "Site Name," "Region," "Location ID," "Location Description," "Location Type," "Name," "Status," "Custom Tag" fields (1, 2, 3, and 4), "Tag Notes," "Source," "Order Number," "Vendor," "Funding Source," "Account Code," "Purchase Price," "Purchase Date," "Projected Life," "Expiration Date," "Last Scan Date," "Last Scan By," "SKU," "Area," "FRN," "State Funding Percentage," "Federal Funding Percentage," "Invoice Date," "Invoice Number," "Installation Site," "Installation Date," "Facility ID," "Staff Status," "CFDA," and "Sale Price."

1. Click on **Tags**, located in the top navigation bar.
2. Click the **Please Select Tag Report** drop-down menu, located above the blue grid header.
3. Select **Archived Inventory** under the "--- Excel ---" menu subcategory.
4. If prompted with "Do you want to open or save csv," click on **Open**. The "Archived Inventory" opens within Microsoft Excel. If your browser does not prompt you to open the file, check your downloads folder.

Components Listing

This report, in CSV format, provides a district-wide list of current component and parent tags. The report includes "Parent Tag," "Asset Type," "Tag," "Serial," "Product Number," "Product Name," "Manufacturer," "Product Type," "Site Name," "Location," "Status," "Vendor," "Funding Source," "Grade," and "Email" fields.

1. Click on **Tags**, located in the top navigation bar.
2. Filter the "Tags" grid, using the **Basic Filters** and/or **Advanced Filters** feature, for the respective tag information.
3. Click the **Please Select Tag Report** drop-down menu, located above the blue grid header.
4. Select **Components Listing** under the "--- Excel ---" menu subcategory.
5. If prompted with "Do you want to open or save csv," click on **Open**. The "Components Listing" opens within Microsoft Excel. If your browser does not prompt you to open the file, check your downloads folder.

E-Rate Report

This report, in CSV format, provides "E-Rate" asset information from purchase orders. The report includes "Site ID"; "Site Name"; "Current Room"; "Room Description"; "Tag"; "Serial"; "Product Number"; "Product Name"; "Manufacturer"; "Model"; "Purchase Order"; "Vendor"; "Funding Source"; "FRN"; "State Funding Percentage"; "Federal Funding Percentage"; "Department";

"Account Code"; "Purchase Date"; "Purchase Price"; "Invoice Number"; "Invoice Date"; "Delivery Site"; "Delivery Date"; "Original Install Site"; "Original Install Room"; "Original Install Date"; "Expiration Date"; "Status"; "Asset Condition"; "Asset Type"; "Custom Tag Field #1, #2, #3, and #4"; "Tag Notes"; "Status Notes"; "Last Scan Date"; and "Staff Status" fields.

1. Click on **Tags**, located in the top navigation bar.
2. Filter the "Tags" grid, using the **Basic Filters** and/or **Advanced Filters** feature, for the respective tag information.
3. Click the **Please Select Tag Report** drop-down menu, located above the blue grid header.
4. Select **E-Rate Report** under the "--- Excel ---" menu subcategory.
5. If prompted with "Do you want to open or save E-RateReport.csv," click on **Open**. The "E-Rate Report" opens within Microsoft Excel. If your browser does not prompt you to open the file, check your downloads folder.

Room Audit Detail Report

This report, in CSV format, provides a listing of the tags and their respective audit state for room audit(s) within a respective campus. The "Room Audit Detail Report" is not available in "Site View" (check the "Rooms Grid Reports"). This report includes "Site ID," "Site Name," "Tag," "Serial Number,"
"Audit State," "Audit Scan Date," "Audit Scan By," "Audit Location," "Expected Location," "Room Type," "Audit Date," "Audit By," "Audit Status," "Action Taken," "Audit Notes," "Product Number," "Product Name," "Model," "Manufacturer," "Product Type," "Inventory Status," "Tag," "Notes," "Order Number," "Funding Source," "Department," and "Purchase Price."

1. Click on **Tags**, located in the top navigation bar.
2. Click the **Please Select Tag Report** drop-down menu, located above the blue grid header.
3. Select **Room Audit Detail Report** under the "--- Excel ---" menu subcategory. The "Filter Report" window opens.
4. (Optional) Filter the report using the **Site**, **Audit State**, and/or **Audit Status** drop-down menus.

5. Click on **GO**.
6. If prompted with "Do you want to open or save csv," click on **Open**. The "Room Audit Detail Report" opens within Microsoft Excel. If your browser does not prompt you to open the file, check your downloads folder.
7. Click on **Close** to close the "Filter Report" window.

Status Lifecycle Report

This report, in CSV format, provides a list of all statuses, at various times, to the filtered tags. Dependent on selected filters in the "Tags" grid, this report may include "Selected Status," "Status Notes," "Origin Site," "Scan Date," "Scan By," "Tag," "Serial," "Product Number," "Product Name," "Manufacturer," "Product Type," "Site Name," "Location," "Asset Type," "Status," "Vendor," and "Funding Source."

1. Click on **Tags**, located in the top navigation bar.
2. Filter the "Tags" grid, using the **Basic Filters** and/or **Advanced Filters** feature, for the respective tag information.
3. Click the **Please Select Tag Report** drop-down menu, located above the blue grid header.
4. Select **Status Lifecycle Report** under the "--- Excel ---" menu subcategory. The "Status Lifecycle Report Filters" window opens.
5. Filter the report using the **Status** and **Date Range** dop-down menus. These are required fields.
6. Choosing **Custom Date Range** opens additional fields.
    1. Click on **Open the calendar popup** to select the "Start Date."
    2. Click on **Open the calendar popup** to select the "End Date."
7. Click on **GO**.
8. If prompted with "Do you want to open or save csv," click on **Open**. The "Status Lifecycle Report" opens within Microsoft Excel. If your browser does not prompt you to open the file, check your downloads folder.

Model End of Life Report

This report, in CSV format, provides information related to the age of tags as filtered using the "Tags" grid filters ("Basic" and/or "Advanced"). The report includes "Site ID," "Site Name," "Location," "Tag Number," "Serial Number," "Product Name," "Product Type," "Manufacturer," "Model," "Suggested Price," "Projected Life," "Status," "Funding Source," "Account Code," "Purchase Date," "Purchase Price," "Model End of Life," "Approaching End of Life," and "Past End of Life" fields.

1. Click on **Tags**, located in the top navigation bar.
2. Filter the "Tags" grid, using the **Basic Filters** and/or **Advanced Filters** feature, for the respective tag information.
3. Click the **Please Select Tag Report** drop-down menu, located above the blue grid header.
4. Select **Model End of Life Report** under the "--- Excel ---" menu subcategory.
5. When the message appears asking, "Do you want to open or save ModelEndOfLife.csv," click on **Open**. The "Model End of Life Report" opens within Microsoft Excel. If your browser does not prompt you to open the file, check your downloads folder.

Tag Depreciation Report

This report, in CSV format, provides tag depreciation value based on selected filters. The user filters the tags by "Report Date," what tags to "Report On," whether to "Calculate Depreciation" by month or year, and whether or not to "Include Archived Inventory." This report includes "Site ID," "Site Name," "Location," "Archive Date," "Archive By," "Archive Notes," "Tag Number," "Serial Number," "Product Name," "Product Type," "Manufacturer," "Model," "Suggested Price," "Projected Life," "Status," "Funding Source," "Account Code," "Purchase Date," "Purchase Price," "Age," "Annual Depreciation," "Monthly Depreciation," "Depreciated Value," "FRN," "State Funding Percentage," "Federal Funding Percentage," "Sale Price," "Invoice Date," "Invoice Number," and "Staff Status."

When creating a "Tag Depreciation Report," annual depreciation and depreciated value are calculated only when the purchase price, purchase date, and projected life of a tag is available.

1. Click on **Tags**, located in the top navigation bar.

2. Filter the "Tags" grid, using the **Basic Filters** and/or **Advanced Filters** feature, for the respective tag information.
3. Click the **Please Select Tag Report** drop-down menu, located above the blue grid header.
4. Select **Tag Depreciation Report** under the "--- Excel ---" menu subcategory. The "Tag Depreciation Report Filters" window opens.
5. Click on **Calendar Control (open the calendar popup)** next to the **Report Date** field to edit the date. The current date is the default date.
6. Select "Month" or "Year" from the **Calculate Depreciation By** drop-down menu.
7. Select or deselect **Include Archived Inventory**.
8. Click on **GO**.
9. If prompted with "Do you want to open or save csv," click on **Open**. The "Tag Depreciation Report" opens within Microsoft Excel.

Tag Listing Report

If the "Tags" grid is filtered using the "Tag Listing" report, the report will display only the filtered tag information in a CSV file. The "Tag Listing" report default columns include "Tag," "Serial," "Product Number," "Product Name," "Manufacturer," "Product Type," "Site Name," "Location," "Asset Type," "Status," "Vendor," and "Funding Source." Edit columns to include a greater amount of tag information, including:

- Where each tag is located:
  - Site
  - Site ID
  - Region
  - Location
  - Location ID
  - Location Type

  - Destination
  - Facility ID
- What kind of item each tag is tracking:
  - Product Type
  - Product Name
  - Product ID
  - Product Description
  - Model
  - SKU
  - Manufacturer
  - 3 possible product Other Fields' information
  - Model End of Life
  - Projected Life
  - Suggested Price
- Each Tag's specific information:
  - Tag Number
  - Serial Number
  - Asset UID
  - Asset Type
  - Parent Tag
  - Active or Inactive
  - Status ("In Use" or "Available")
  - Area Assigned

    - 4 possible tag Custom Fields' information
    - RFID
    - Expiration Date
    - Last Scan Date & by Whom
- Each Tag's inventory and funding history:
    - Inventory Type ("Initial" or "Order")
    - Order Number
    - Account Code
    - Vendor
    - Funding Source
    - Purchase Price
    - Purchase Date

1. Click on **Tags**, located in the top navigation bar.
2. Filter the "Tags" grid, using the **Basic Filters** and/or **Advanced Filters** feature, for the respective tag information.
3. Click the **Please Select Tag Report** drop-down menu, located above the blue grid header.
4. Select **Tag Listing** under the "--- Excel ---" menu subcategory.
5. If prompted with "Do you want to open or save csv," click on **Open**. The "Tag Listing" report opens within Microsoft Excel.

List All Issued Devices Based on Due Date

The tags grid is a quick way to get you a list of devices and it allows you to set parameters to filter the data to match the information you need. The following is a step-by-step process for creating a listing of all devices issued to staff or students, based on due date.

Who can use this feature?

- **Admin** or **Site Admin**

The Process

1. From the **Tags** grid, set the following parameters:
    - Location: Student and/or Staff
    - Status: In Use
    - If in District view, choose Site view
    - Filter for any additional data sets (i.e., grade level)
2. Add a **Due Date** column from the Edit Column action above the Tags grid header.
3. Choose **Tags Listing** from the **Tags Report** drop down menu.
4. Open the exported file in your favorite spreadsheet software.

Pro Tip

Remove data columns that do not apply to the current search. Add columns that enhance reported data. Leaving basic filters as default returns all records for that field.

Using the Tags Grid for Bulk Edits

Bulk Edit, located at the top of the "Tags" grid, allows an administrative user to edit multiple tags at once. The Bulk Edit tool does not allow edits to tags with the Inventory Type of "Order." This means only initialized tags are available to bulk edit.

The fields eligible to be edited are Department, Purchase Date, Purchase Price, Funding Source, and Status.

Bulk Edit Tag Information

Administrative-level users and site administrators can edit a small number of fields associated with the tag (including the tag number, serial number, tag notes, and custom fields, if they apply). They must be logged into the site where the tag is located to edit the tag's information.

1. Click on **Tags**, located in the top navigation bar.
2. Filter the "Tags" grid for the desired tags to be edited.
3. Click on **Bulk Edit**. The "Bulk Edit" window opens.
4. Select the respective field to edit using the **Field to Edit** drop-down menu. Additional fields populate.
5. Select/enter additional information in respective fields.
6. Click on **Next**. This displays the "Sample Selection" grid containing a small sample of tags selected for bulk edit.
7. Click on GO **GO**, located below the "Sample Selection" grid. The "Bulk Edit Confirmation" window opens with a review of the respective bulk edit details.
8. Click **OK** to proceed with the bulk edit. The "Bulk Edit Complete" window opens and displays a success message.
9. Click **OK**.

Bulk Edit Status Change and Archive

1. Click on **Tags**, located in the top navigation bar.

2. Filter the "Tags" grid for the desired tags to be edited.
3. Click on **Bulk Edit**. The "Bulk Edit" window opens.
4. Select **Status** using the **Field to Edit** drop-down menu.
5. Select the respective status in the **Update Records To** field.
6. Check **Archive Records**.

Note: Archive Records is not available for the statuses of "Available," "In Repair," or "In Use."

7. Click on **Next**. This displays the "Sample Selection" grid containing a small sample of tags selected for bulk edit.
8. Click on **GO**, located below the "Sample Selection" grid. The "Bulk Edit Confirmation" window opens.
9. Enter the number of tags being archived in the **Confirm the count by typing it here** field.
10. Click the **Tag(s) Selected for Archive** report at the bottom of the "Bulk Edit Confirmation" window. A report opens in CSV format listing all the tags impacted by this operation.
11. Click **Confirm** to proceed with the bulk edit. The "Bulk Edit Complete" window opens and displays a success message.
12. Click **OK**.

Bulk Edit Notes

To edit the Purchase Date, Purchase Price, and/or Funding Source assigned to a specific tag with an Inventory Type of "Order," use **Edit Purchase Order Details**.

* Only districts with the "Departments" feature enabled will have the "Department" option displayed in the **Field to Edit** drop-down menu.

** Bulk Edit Statuses are limited. The table below breaks down the rules pertaining to status-changing in bulk, as they relate to the tag's Location. Tags with the Asset Type of "Parent" are eligible for bulk edit status changes and will automatically update respective "Component" tags. Tags with the Asset Type of "Component" are not eligible for bulk edit status changes if their Parent is not part of the filtered data.

AVAILABLE = Tags in the status of "Available"

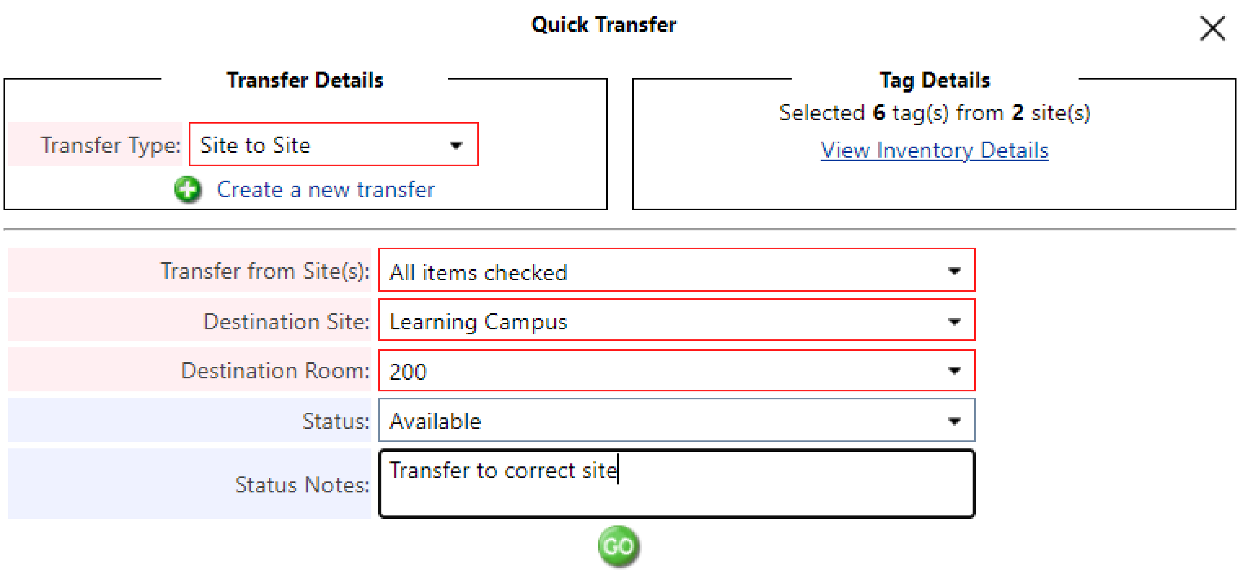
NOT AVAILABLE = Tags not in the status of "Available" (includes Auctioned, Disposed, In Repair, In Use, Lost, Recycled, Returned to Vendor, Sold, Stolen, Surplus, and Used for Parts)

Status Transfer Details	Rooms	Staff	Students	Transfers
From AVAILABLE to NOT AVAILABLE (Example: "Available" to "Returned to Vendor")	**YES**	**NO**	**NO**	**NO**
From NOT AVAILABLE to NOT AVAILABLE (Example: "In Repair" to "Disposed")	**YES**	**YES**	**YES**	**NO**
From NOT AVAILABLE to AVAILABLE Only "In Use" and "In Repair" are eligible NOT AVAILABLE statuses (Example: "In Use" to "Available" or "In Repair" to "Available")	**YES**	**NO**	**NO**	**NO**

Transfer Assets Quickly via Tags Grid

Quick Transfer allows administrative administrators the ability to bulk transfer tags (in the status of Available) from multiple origin sites to a single destination or from multiple rooms at a site to a single destination room within the same site. This process does not require each tag to be scanned. Filter the Tags grid to select the desired tags.

Note: Tags issued to a student or staff member cannot be included in a Quick Transfer.



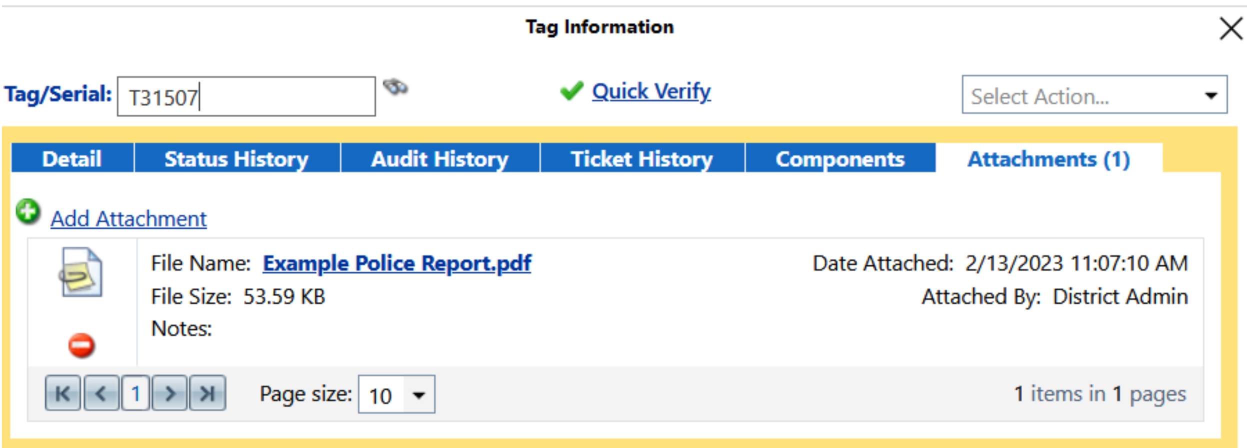
Perform a Room-to-Room Quick Transfer

1. Click on **Tags**, on the top navigation bar.
2. Filter the "Tags" grid for the respective tags to transfer.
3. Click on **Quick Transfer**. The "Quick Transfer" window opens.
4. Select **Room to Room** using the **Transfer Type** drop-down menu.
5. Click on **Create a New Transfer**.
6. Select the site using 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 destination room from the **Destination Room** drop-down menu.
10. Select the tag status from the **Status** drop-down menu.
11. Enter **Status Notes** (optional). Character limit of 1,000.
12. Click on GO **GO**. The "Room to Room Transfer Confirmation" window opens.
13. Confirm that the number of tags displayed in red and the destination room are accurate.
14. Type in the confirmation word (case sensitive) displayed on the "Room to Room Transfer Confirmation" window.
15. Click on **Confirm**. A processing window opens and displays the progress of the transfer.
16. The "Quick Transfer" window opens and displays the message "Transfer Completed Transfer Process Complete."
17. Click **OK**.

Attach a File to a Tag

Tag Search is available in the top navigation bar. It allows a user to search for a specific tag or an item's serial number (a minimum of 3 digits are required), review details regarding that tag, and edit tag specific information. To change the status of a tag, review Change Tag Status.



1. On the top navigation bar, click within the Tag/Serial Search field. 

2. Enter/scan the tag number of the intended Parent tag. This can consist of alphabetic or numeric characters.
3. Click **Search** or hit the Enter key. The Tag Information window opens to display the tag details.
4. Click the **Attachments** tab.
5. Click **Add Attachment** to open the window.
6. Click **Browse** to search for and select the respective file.
7. Enter any necessary notes in the Notes field (optional).
8. Click **Save** to close the Add Attachment window. The Attachment tab updates.
9. Click **Close** to close the Tag Information Window.

Transfer History Reports

Asset Management allows items to be moved from site to site through site process only transfers (Site-to-Site, Site-to-Warehouse, and Warehouse-to-Site) and administrative only process (Quick Transfers).

The Transfer History window allows an administrator to search for, view, and print a Transfer Report for all site-to-site transfers (in any status) throughout the district.

Transfer Condition	Report Includes:
Pending approval or has been approved	*Approved By* and *Approved* On date.
Edited	*Last Edited By* and *Last Edited On* date.
Denied	*Denied By* and *Denied On* date.
Initiating site has added delivery instructions to the transfer	Notes will be included on the Transfer Ticket, just below the From/To boxes.

Review a Site-to-Site Transfer Ticket

1. Under "Admin Tools Quick Links", click **Transfer History** to open the Transfer History window.
2. Filter for the respective site-to-site transfer.
3. On the site-to-site transfer's row, click **Print Transfer Report** to display the Transfer Ticket.
4. **Print** or **Save** the ticket as desired.

5. Click **Done** to close the Transfer Ticket view.

6. Click Close to close the Transfer History window.

Site-to-Site Transfer Ticket

This article discusses site-to-site ticket transfer.

The "Transfer Ticket" contains the following:

- List of the product(s) and respective tag numbers included in the site-to-site transfer.
- "Notes" section where the initiating site communicates transfer details to the receiving site.
- Digital signatures and any updates made to the transfers throughout its lifecycle.

Updates made to the transfer appear on the "Transfer Ticket" in the sections "Ready for Pickup," "Pickup Postponed," and "Removed from the Transfer."

Print a Copy of a Transfer Ticket

"Transfer Ticket" can be printed by either site involved in the transfer at any point during the transfer.

1. Locate the correct transfer in **Initiate Transfer**, **Receive Transfer**, or **Transfer History** in the "Transfer Tools Quick Links" menu.
2. Enter the transfer number in the **Transfer #** field or click on **Search** to find and select the appropriate transfer.
3. Click on **Print Transfer Ticket** in the "Actions" section. The "Transfer Ticket" opens in the "Review Transfer" window.
4. Select **Display Images** to display catalog images of the product on the "Transfer Ticket."
5. Using the PDF reader's controls, print out the "Transfer Ticket."
6. Click on **Done** to close the "Transfer Ticket."
7. Click on **Close** to close the "Receive Transfer" window.

Catalog

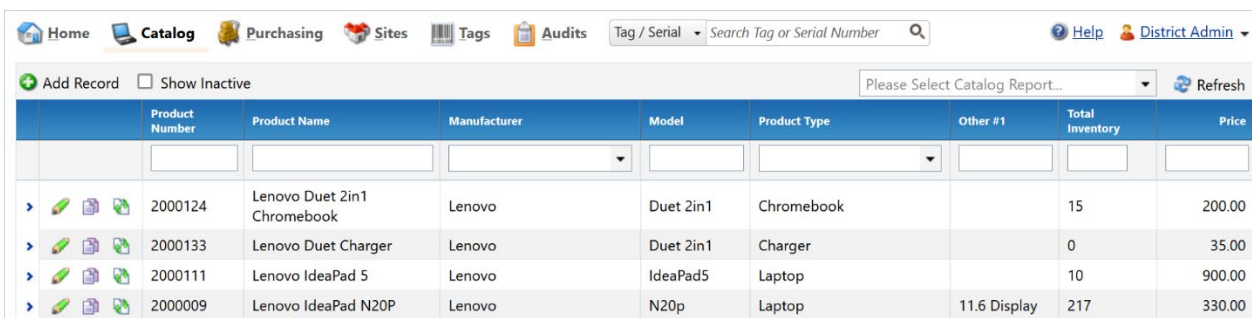
Catalog Grid Overview

The Catalog is a group of tables that create a framework, or categorization, of products in your database. These tables help standardize the way your assets are presented by providing preset definitions of product types, manufacturers, product names, model end-of-life, and images.

Products must exist in the catalog prior to adding an associated asset and can be added and edited ONLY at the "Administrative View" by an administrator or user with permission to edit the catalog. This grid is also available at the Site View and will be automatically filtered to show only those products that are located at the corresponding site. Site level admins and users can view the details of products that reside at their assigned site(s).

Catalog Functionality

The **Catalog** grid allows an administrator to add a new product, view existing products, inventory details, sites where product resides, and respective accessories.



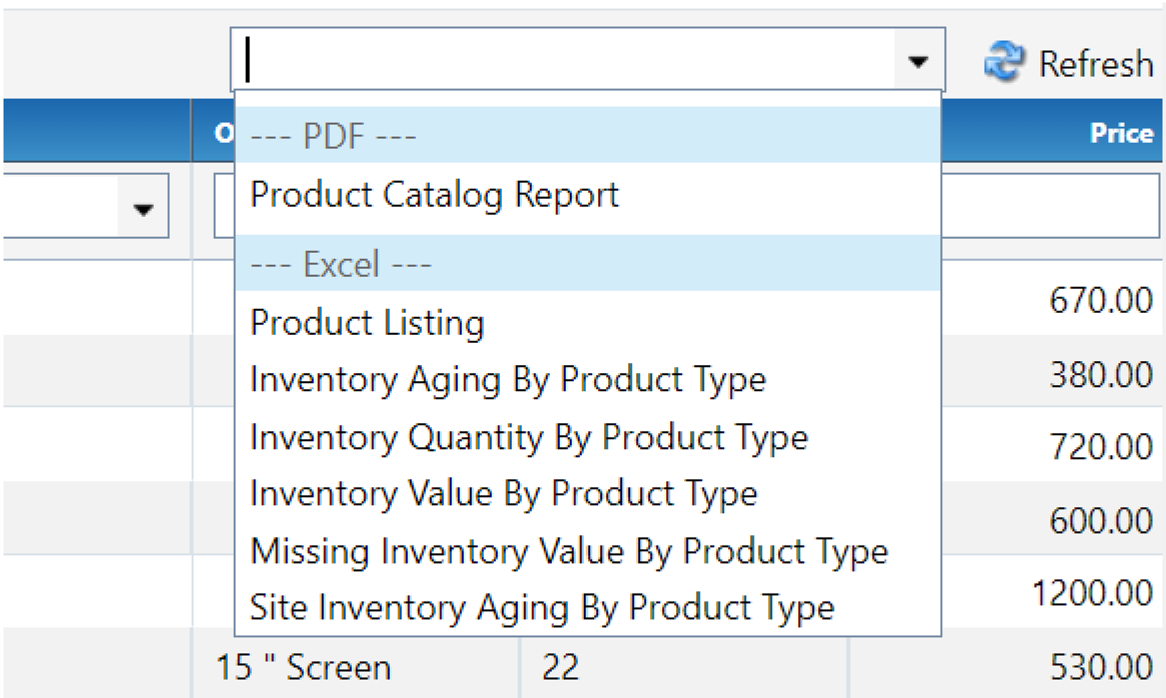
Product Number	Product Name	Manufacturer	Model	Product Type	Other #1	Total Inventory	Price
2000124	Lenovo Duet 2in1 Chromebook	Lenovo	Duet 2in1	Chromebook		15	200.00
2000133	Lenovo Duet Charger	Lenovo	Duet 2in1	Charger		0	35.00
2000111	Lenovo IdeaPad 5	Lenovo	IdeaPad5	Laptop		10	900.00
2000009	Lenovo IdeaPad N20P	Lenovo	N20p	Laptop	11.6 Display	217	330.00

Catalog Grid Functions	
Add Record	Adds a product to the Asset Management catalog.
Show Inactive	When checked, allows the viewing of any product marked as inactive.

Catalog Grid Functions	
Search Fields	Located at the top of the **Catalog** grid, the search fields allow for keyword and dropdown filtering of products using the Product Number, Product Name, Manufacturer, Model, Product Type, Other #1, and/or Price search fields.
Edit	Located on each product's row, this is the process by which a user may add/edit the respective product's details.
Duplicate	Located on each product's row, this is the process by which a user may duplicate an existing product's details for time-saving measures.
Merge	Located on each product's row, this is the process by which a user may merge assets associated with two products into one to clean up duplicate and incorrect entries.

Catalog Reports

The **Catalog** grid provides the following report options. This grid is also available at the Site View and will be automatically filtered to show only those products that are located at the corresponding site. *Results are dependent on how the Catalog grid is filtered prior to selecting the report.*

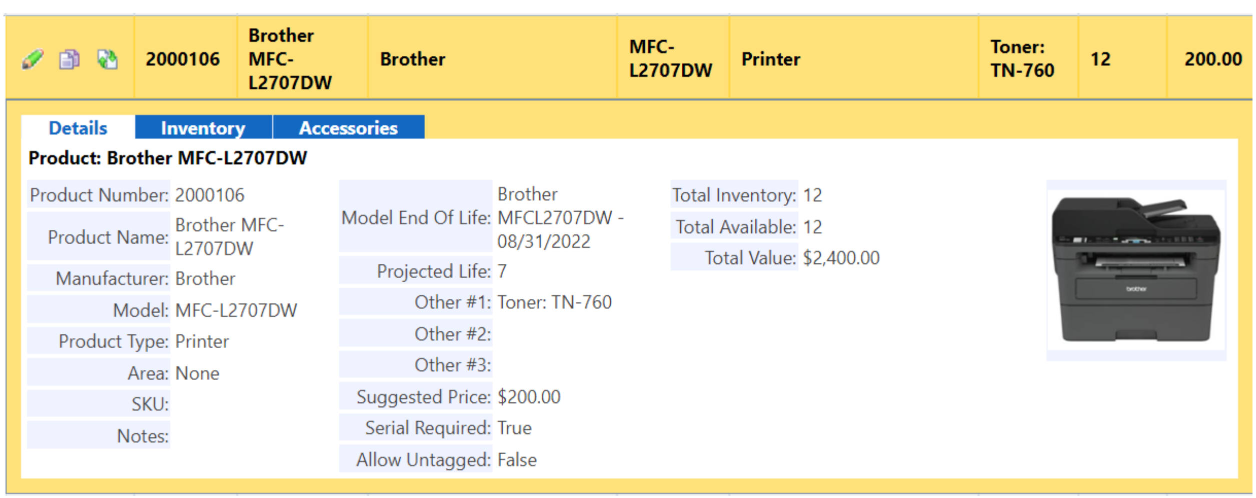


Catalog Reports Dropdown	
Product Catalog Report	Provides, in, PDF format, a listing of all and includes Product Description, Product Number, Manufacturer, Model, Product Type, Area, Price, Other 1, 2, & 3, Total Inventory (qty), SKU, Projected Life, Allow Untagged and Notes fields. Filters available include Area, Other #2, Other #3 Projected Life, Notes and Allow Untagged.
Product Listing	Provides, in CSV format, a listing of all products and includes Product Number, Product Name, Manufacturer, Model, Product Type, Other #1, Other #2, Other #3, Price, Quantity and Total Value fields.
Inventory Aging by Product Type	Provides, in CSV format, a listing of Product Type, Site Name, Location Type, Quantity, and Age (which is calculated by the purchase date of the catalog item) for the entire district.

Catalog Reports Dropdown	
Inventory Quantity by Product Type	Provides, in CSV format, a listing of Product Type, Location Type, Quantity for the entire district.
Inventory Value by Product Type	Provides, in CSV format, the total value of existing inventory across the district. Includes Product Type, Site, Quantity and Total Value
Missing Inventory Value by Product Type	Provides, in CSV format, the total value of missing inventory from audit. Includes Product Type, Site, Missing Count and Total Missing Value. Filters include Audit Start Date and Audit End Date.
Site Inventory Aging by Product	Provides, in CSV format, a listing of Product Type, Site, Location Type, Quantity, and Age (which is calculated by the purchase date of the catalog item) for the entire district.

Product Details

Selecting a product allows a user to view details for the respective product. The Details tab displays each product's information.

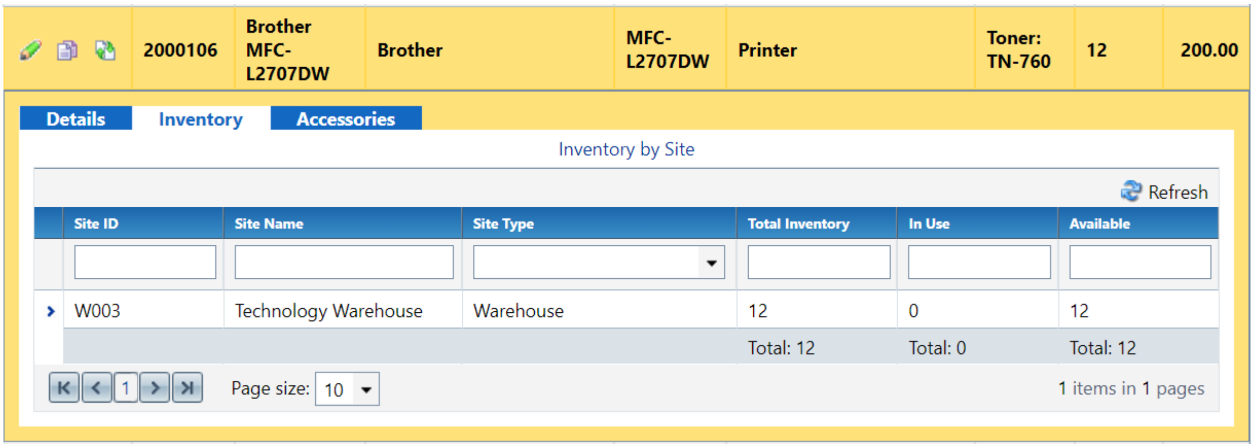


Product Details Tab	
Product Number	An auto-generated field; however, the district-level administrative user has the option to enter their own product number.
Product Name	Name of the product.
Manufacturer	Company which produces the product.
Model	Manufacturer's specific version of the product.
Product Type	Description of the different types or groups of products (such as laptop, calculator, printer, cell phone, etc.).
Area	A descriptive area to which a product is associated (such as science, special education, 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 user-created notes.
Model End of Life	Displays the known end-of-life date for the product.
Projected Life	Number of years this product is predicted to be usable.
Other #1	Optional field used to track miscellaneous information regarding the product.

Product Details Tab	
Other #2	Optional field used to track miscellaneous information regarding the product.
Other #3	Optional field used to track miscellaneous information regarding the product.
Suggested Price	Suggested replacement price for the product.
Serial Required	True or false setting used to require a serial number be recorded when a tag is issued for this product.
Allow Untagged	True or false setting used to allow this product to be tracked by qty instead of individual tag number. Most commonly used for products in a warehouse.
Total Inventory	Quantity of the product.
Total Available	Quantity of the product tagged and currently in the status of "Available" (versus the status of "In Use").
Total Value	Calculated by the Total Inventory count multiplied by the Suggested Price.
Image of Product	Picture associated with the product and displayed on numerous screens and various reports.

Product Inventory

Selecting a product allows a user to view details for the respective product. The Inventory tab displays the product's total inventory count, the total In Use, and the total Available. It displays the sites to which the product has been issued and the status of the item at the site level.

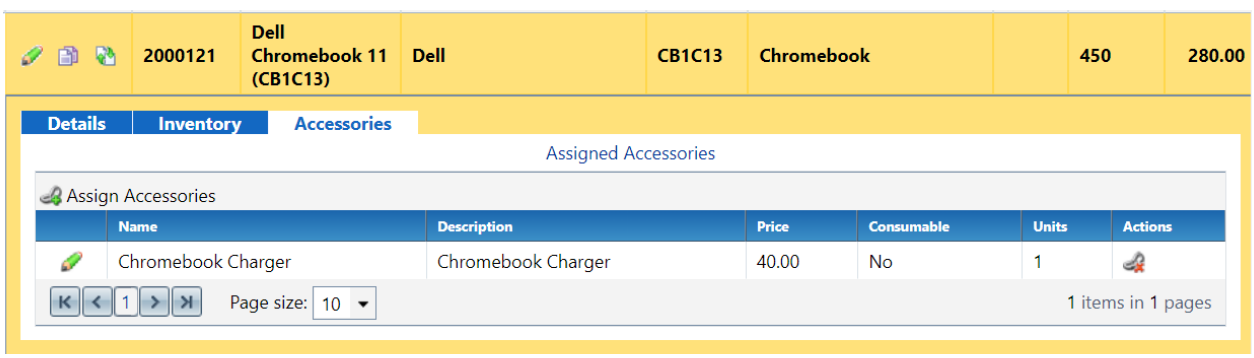


Product Inventory Tab	
Site ID	An alpha and/or numeric identification number as assigned by the student management system, imported into the Asset Management data, and/or as entered by the administrative level.
Site Name	Name of the site.
Site Type	General categories used to identify different kinds of sites (such as: Elementary Campus, Middle School Campus, Print Services, Administration, etc.).
Total Inventory	Quantity of the product as assigned to this site.
In Use	Quantity of the product tagged and currently in the status of "In Use."

Product Inventory Tab	
Available	Quantity of the product tagged and currently in the status of "Available."
Site Level Information	Clicking on the site will display the location type (Room, Staff, and/or Student) the item is issued to at the site level and the respective type's inventory total. The action icon for each location type will display the specific rooms, staff members, and/or students the item has been issued. **Location Type** - includes **Rooms**, **Staff**, and **Students**. **Detail Inventory** - A detailed view of inventory counts by specific location and status.

Product Accessories

Selecting a product allows a user to view details for the respective product.
The **Accessories** tab displays each accessory associated with this product. Accessories may be issued with a tagged item. The accessory, however, is not tagged.



Product Accessories Tab	
Assign Accessories	Assigns optional items which may be issued along with the product to which it is assigned.
Edit	Is located on each accessory's row and is the process by which an administrator may add/edit/alter the respective accessory's details.
Name	Name of the accessory.
Description	Description of the accessory as entered by the administrative level.
Price	Replacement price of the accessory.
Consumable	No or yes designation of the administrative level to establish what is not expected to be returned when the tag/item is collected.
Missing Charge	Enabling this setting will automatically assess a missing accessory charge to the student or staff when not returned during collection. The charge amount will be set to the price of the accessory.
Units	Number of units to be issued when the associated product is issued to room, staff member, or student.

Product Accessories Tab	
Actions	**Remove** - a process that removes the accessory from the respective product.

Purchasing

Purchasing Grid Overview

The Purchasing grid allows an administrative district-level user to create purchase orders, receive items, ship items to sites, and quickly assign items to sites while simultaneously recording essential purchasing data (purchase order number, purchase date, vendor, funding source, and quantity).

The Attachments tab allows the user to attach files of up to 1MB to a purchase order. This could be an invoice, packing slip, or copy of the initial purchase request. A purchase order may contain multiple products. Items can be assigned and/or shipped to multiple sites.

A user with Site View privileges will only see Purchase Order detail from POs that resulted in asset that are located at their assigned site(s).

Purchasing Functionality

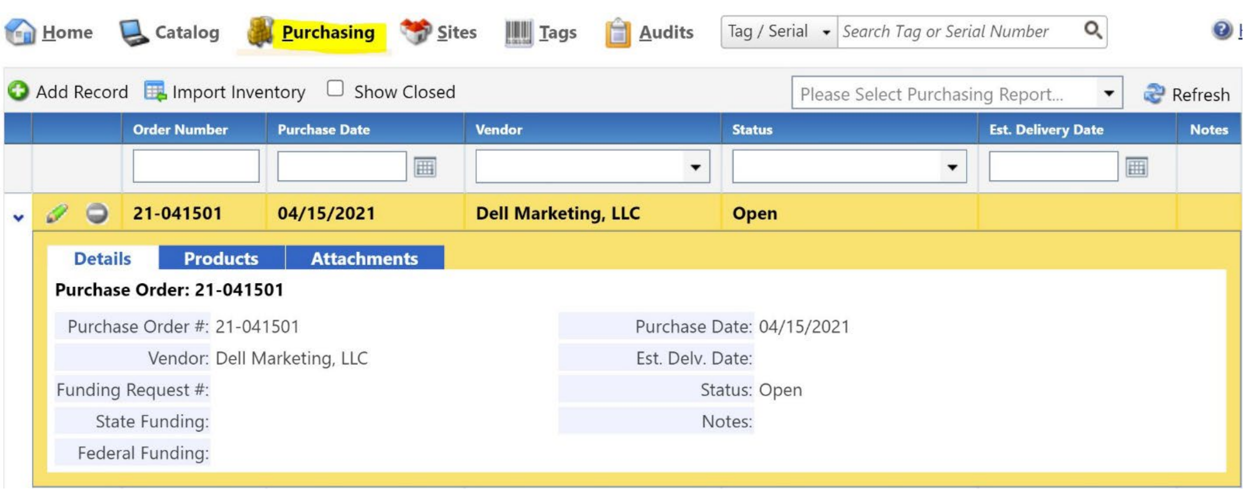
The following functionality is available throughout Purchasing:

Function	Definition
Add Record	Record a purchase order in Asset Management
Import Inventory	Import inventory directly to a purchase order
Search Fields	Allows a district administrator to search for purchase orders using the order ID, purchase date, vendor, status, estimated delivery date, or notes fields. Located at the top of the Purchasing grid.

Function	Definition
Edit	The process by which an administrator may add/edit the order details. Located on each purchase order's row.

Purchase Order Tabs

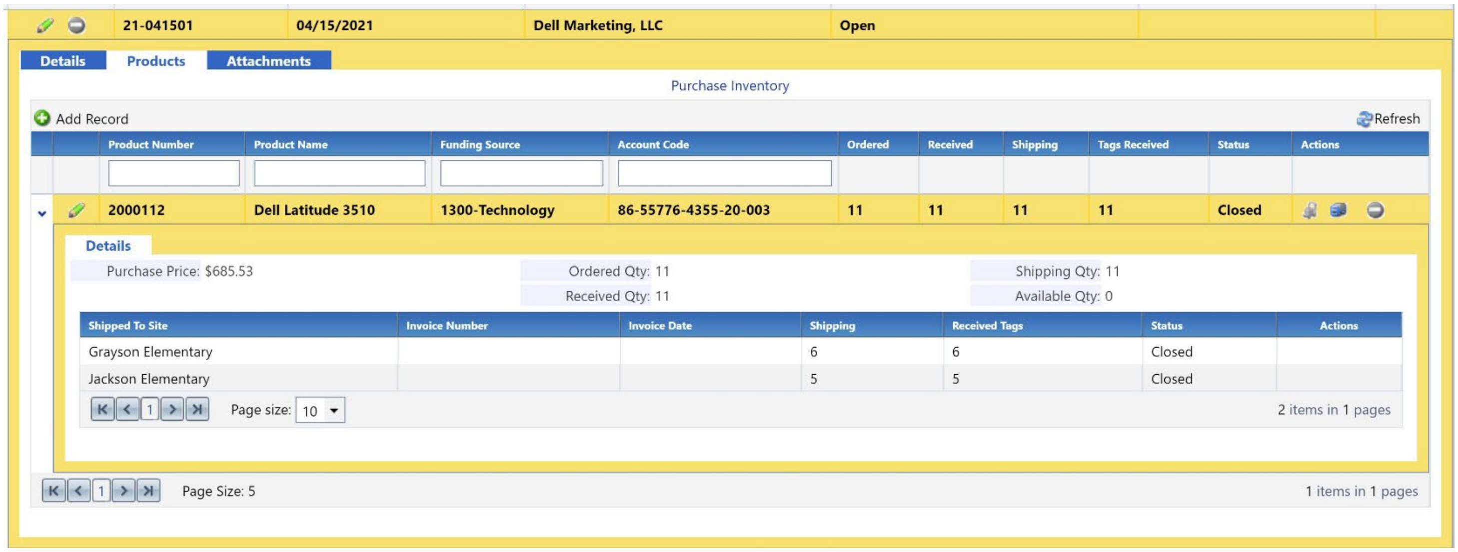
The **Details** tab displays each purchase order's information as entered by the creator of the purchase order (site administrator or administrative level).



Function	Definition
Purchase Order ID	An alpha-numeric purchase order number
Vendor	Name of an individual or a company who provides/supplies products to your district (similar to a supplier)

Function	Definition
Funding Request #	Number assigned to the funding request covering the purchase of the product; necessary for the E-Rate report.
Stated Funding	The percent of funding on this purchase coming from state level funds.
Federal Funding	The percent of funding on this purchase coming from federal level funds.
Purchase Date	The 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).
Estimated Delivery Date	The date the items on the purchase order are expected to be received from the vendor.
Status	The current status of this purchase order.
Notes	Displays notes entered by the creator of the purchase order and/or a district level user.

The **Products** tab displays each purchase order's product information as assigned by the creator of the purchase order and/or a district level user.

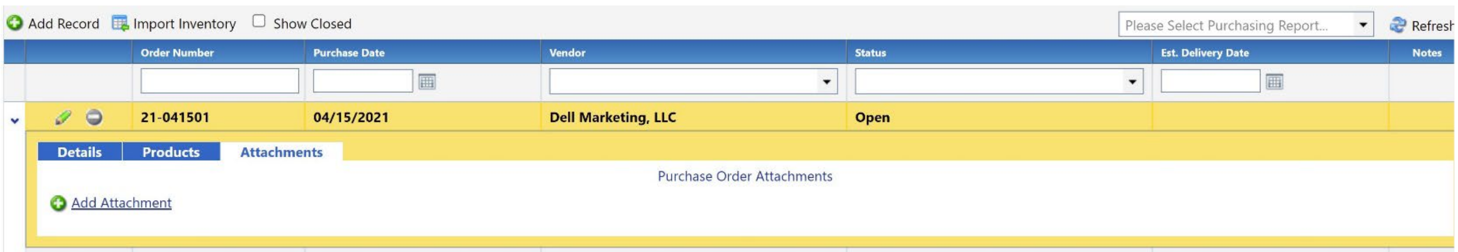


Function	Definition
Edit	Edit the contents of the grid row.
Product Number	Asset Management assigned product number.
Product Name	Name of the product.
Funding Source	The percent of funding on this purchase coming from state level funds.
Account Code	Source of financial resources used to purchase an item.
Ordered	Quantity of the product ordered from the vendor.

Function	Definition
Received	Quantity of the product received by the district from the vendor.
Shipping	Quantity of the product the district has shipped to respective sites.
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 district level administrator 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 district level administrator to assign and issue tags to a respective site's room. • **Delete** - Deletes any product assigned to the respective purchase order with no received items.
Specific Product Information	Displays the product's Details tab.

Function	Definition
Purchase Price	Amount entered by the district level administrator when adding the product to the respective purchase order (may be different than the product's suggested price).
Ordered Quantity	Quantity of the product ordered from the vendor.
Received Quantity	Quantity of the product received by the district from the vendor.
Shipping Quantity	Quantity of the product the district has shipped to respective sites.
Available Quantity	Quantity of the product received by the district from the vendor and not yet shipped to a site.
Shipped to Site	A list of site names which have been shipped the respective product for this purchase order.
Invoice Number	Number designated by the vendor for billing.
Invoice Date	Date vendor creates the invoice.
Shipping	Quantity of the product the district has shipped to respective sites.
Received Tags	Quantity of the product tagged and issued to a room on the respective sites.

The **Attachments** tab displays any attachment details saved to the purchase order. It includes the type of file, file name, file size, and notes. The date the attachment was saved and the name of the person saving the file is displayed. The attachment can be deleted using the delete icon.



Function	Definition
Add Attachment	Allows an attachment to be added to the purchase order.
Browse	Allows the user to search for the desired file to attach to the purchase order.
Notes	Information pertaining to the file to be attached is inserted here.
Save	Saves the attachment to the purchase order.
Cancel	Cancels the attachment of the file selected.

The **Purchasing** grid provides the following report options. Reports are accessed via the dropdown in the upper right corner of the grid. This grid is also available at the Site View and will be automatically filtered to show only those purchase orders that are located at the corresponding site. To report on a subset of data, filter the **Purchasing Grid** prior to running the report.

Report Option	Report Description
Purchase Order Listing	Provides in .CSV format a list of all the Purchase Orders displayed on the Purchase Grid. The report includes Order Number, Purchase Date, Vendor, FRN, State Funding %, Federal Funding %, Status, Estimated Delivery Date, and Notes.
Product Line Listing Report	Provides in .CSV format, Product Line detail for all Purchase Orders displayed on the Purchase Grid. The report includes Order Number, Purchase Date, Vendor, Vendor Account Number, FRN, State Funding %, Federal Funding %, Purchase Order Status, Estimated Delivery Date, Notes, Product Number, Product Name, Funding Source, Account Code, Purchase Price, Shipped to SiteID, Shipped to Site Name, Invoice Number, Invoice Date, Shipping Quantity, Received Tags, Line Status, and Line Number. Exported in CSV format. Filters include: “Show only outstanding tags to receive”, “Tagging Overdue by” and “Purchase Date Range”

Running Purchasing Reports

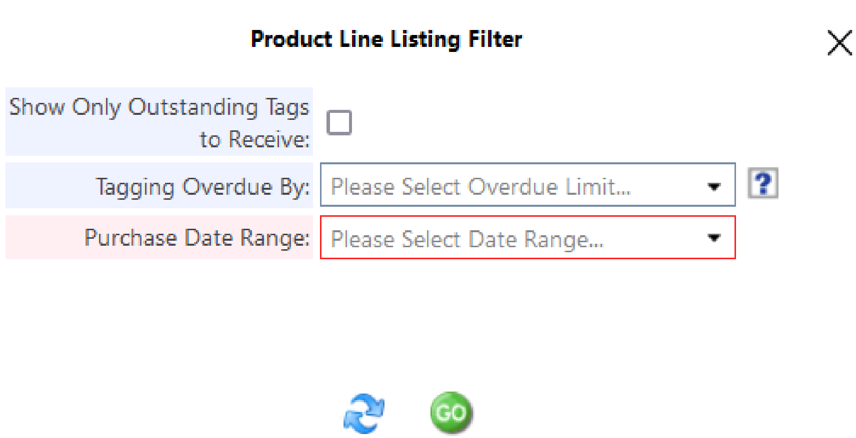
The "Purchasing" grid provides access to preconfigured reports as .csv extracts that can be viewed and manipulated in a spreadsheet program such as Excel or Google Sheets.

When in "Administrative View," the reports by default include all purchase orders in the district. In "Site View," the reports include all purchase orders for assets located at the current site. To return a subset of data, the user is required to apply a filter to the records in the grid prior to running the report.

Product Line Listing Report

This report, in .csv format, provides a list of all line items on all open purchase orders in the district, using applied filters. The report includes Order Number, Purchase Date, Vendor, Vendor Account Number, FRN, State Funding %, Federal Funding %,Purchase Order Status, Estimated Delivery Date, Notes, Product Number, Product Name, Funding Source, Account Code, Purchase Price, Shipped to Site ID, Shipped to Site Name, Invoice Number, Invoice Date, Shipping Quantity, Received Quantity, Line Status, and Line Number.

1. Click on **Purchasing**, located on the top navigation bar.
2. Click on the **Please Select Purchasing Report** drop-down menu, located above the blue grid header.
3. Select **Product Line Listing Report** under the "--- Excel ---" menu subcategory. The "Product Line Listing Filter" window opens. Select the desired filters. **Purchase Date Range** is a required filter.



4. Click on **GO**.

5. When the message appears asking "Do you want to open or save csv," click on **Open**. The "Product Line Listing Report" opens in Microsoft Excel. If your browser does not prompt you to open the file, check your downloads folder.

Purchase Order Listing

This report, in .csv format, provides a complete listing of all purchasing records displayed on the "Purchasing" grid. The report includes Order Number, Purchase Date, Vendor, FRN, State Funding %, Federal Funding %, Status, Estimated Delivery Date, and Notes fields.

1. Click on **Purchasing**, located on the top navigation bar.
2. Click on **Please Select Purchasing Report** drop-down menu, located above the blue grid header.
3. Select **Purchase Order Listing** under the "--- Excel ---" menu subcategory.
4. When the message appears asking "Do you want to open or save csv," click on **Open**. The "Purchase Order Listing Report" opens in Microsoft Excel. If your browser does not prompt you to open the file, check your downloads folder.

Show Closed Purchase Orders

The Purchasing grid displays only open purchase orders. Closed purchase orders are hidden from the grid except when **Show Closed** is selected. **Closed** means that tags can still be received against the purchase order, but no additional products can be added.

An Administrative Administrator can edit the purchase price, purchase date, and funding information assigned to products on a purchase order. If the site level created the purchase order, they will be able to edit those purchase orders they created, but not those created by the administrative level.

After exiting out of the Purchasing screen, Show Closed will revert to deselected.

1. On the top navigation bar, click **Purchasing**.
2. Select **Show Closed**.
3. From the Status drop-down menu, select **Closed**, located on the blue grid header. The screen refreshes and displays the closed purchase orders.