



**TIPWeb-IT Asset
Management**

**Reference
Guide-Admin**

Table of Contents

(Subheadings are clickable links)

Getting Started

- Administrative View Dashboard 4
- Quick Search Tool 12
- Tag Information Overview..... 15
- Asset Status and Location Guidelines..... 22
- Asset Management Common Icons..... 25
- Customizing the Administrative User Dashboard..... 26

Audits

- Audits Overview 27
- Conduct a Site or District Initiated Audit 46
- Site Audit Overview..... 56
- Initiate Site Audit 74
- Complete Scan Site Audit..... 79
- Approving a Site Audit 80
- Running Audit Reports 81
- Complete District Requested Audit 88
- Audit Reconciliation 96
- Best Practices for Closing Old Audits 100
- Audit Checklist 101
- Audit Best Practices 103

Rooms

- Rooms Grid Overview 104
- Room Types 115
- Running Room Reports 116
- Room-Staff Import..... 121
- Create and Conduct a Room Audit 124
- Add or Edit a Room 130
- Adding Assets via Room Initialization..... 133
- Reconcile a Room Audit 136

Staff

- Staff Types 138
- Running Staff Reports..... 139
- Manage Staff Records 144
- Collect Items from Staff 150
- Issue Item to Staff Account 154
- Assess Staff Charges 156
- Staff Charge Payments 160
- View/Sign a Collection Receipt from Staff..... 163
- Staff Transaction Receipt 165

Issuing a Distribution Receipt to Staff	166
Staff Charge Receipt	168
Saving Attachments to Staff Records	171
Acquire Floating Staff and Issue Item	173
End-of-Year Collection and Reporting	175
Archiving Staff	177
Students	
Student Grid Overview	180
Running Student Reports	185
Creating a Report to see Student Inventory	191
Create a Report to View Students with No Distributions	192
Issue to Student Account	193
Collect from Student to a Room	195
Create a Charge Listing Report for Students	199
Assess Student Charges	200
Student Charge Payments	204
Student Charge Receipts	208
Student Transaction Receipts	211
Issuing a Distribution Receipt to Student	212
View/Sign a Collection Receipt from Student	214
Bulk Assess Student Charges	217
Saving Attachments to Student Records	218
Archiving Students	220
Tags	
Site Tag Information Reports	221
Quick Issue to Staff	223
Quick Issue to Students	226
Quick Collect Assets	228
Edit a Tag	234
Update Tag Locations or Status	241
Tag Export	245
Parent and Components Overview	249
Tags Grid Overview	254
Running Tags Reports	262
List all Issued Devices Based on Due Date	271
Using the Tags Grid for Bulk Edits	272
Transfer Assets Quickly via Tags Grid	275
Attach a File to a Tag	278
Initiate a Site-to-Site Transfer	279
Receiving a Site-to-Site Transfer	282
Approving Transfers	285

Transfer History Reports	289
Site-to-Site Transfer Ticket	291
Archiving Inventory (Tags).....	292
Sites	
Sites Grid Overview	297
Running Sites Reports.....	306
Managing Sites.....	313
Catalog	
Catalog Grid Overview	315
Product Catalog Table of Contents	325
Running Catalog Reports.....	325
Creating an Accessory for Products in the Catalog	330
Mobile Site Views	
Mobile Site Overview	332
Conduct Mobile Site Room Audit	334
Mobile App: Capture Data for Audit	337
Purchasing	
Purchasing Grid Overview	340
Running Purchasing Reports	348
Recording a Purchase Order.....	350
Edit Purchase Order Details	353
Add New Product to Catalog from Purchasing	358
Reprint a Purchasing Ticket.....	360
Show Closed Purchase Orders	362
Receive Vendor Purchases.....	363
Adding and Editing a Vendor	364
Adding and Editing a Funding Source	366
Ship Product to a Site	370
Receive Items for a Site in Admin View	372
Receiving Items to a Site in Site View.....	377
Receive Assets Using the PO Inventory Import.....	381
Preparing Data for the Receive By Tag Import	384
Add Attachment to Purchase Order	385
Troubleshooting Validation Errors During Import	386

Getting Started

Administrative View Dashboard

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



Training Inventory Statistics: All Sites, All Product Types

	Count	Value
Total Inventory	8,043	\$7,079,146.00
Available	3,795	\$1,928,585.00
In Use	3,800	\$4,885,649.00
Other	448	\$264,912.00

[Download_CSV](#)

Tag Distributions

Category	Percentage
Room	94.20%
Staff	2.31%
Student	3.46%
Transfer	0.04%

Tag Status Breakdown (Rooms)

Status	Count
Available	~3800
In Use	~3400
Other	~450
Disposed	~100
In Repair	~100
Lost	~100
Pending Transfer	~100
Returned to Vendor	~100
Stolen	~100
Surplus	~100
Used for Parts	~100

Tags Changed to In Use in Last 6 Months

Month	Count
July	0
August	0
September	0
October	1
November	0
December	0

General Dashboard Elements

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

Element	Description
<p>District Logo</p>	<p>Displays a district-provided .jpg or .gif image (400 pixels wide by 100 pixels tall) on all Asset Management dashboard views (admin and site)</p>
<p>District Name</p>	<p>Displays the assigned district name identified in Asset Management Settings</p>
<p>View Switch</p> <div data-bbox="121 905 440 953" style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Switch to site... ▼ </div>	<p>Allows a user to switch the current screen to the selected site view dashboard of Asset Management by entering the name of the site or selecting it from the drop-down menu</p>

Quick Links

Tools

Description	
<p>Archive</p>	<p>Allows inventory to be removed from active inventory quantities, or sets large groups of staff or students to inactive</p>

Description	
Data Import	Allows districts with a significant amount of data stored in another location to import their data into the Asset Management application. The Data Import Tool may not be available for all districts.
Initiate Site Audit	Allows an administrator to create site audits and identify the site(s), room type(s), product type(s), staff types(s), and grade(s) included on a site-level audit
Issue to Staff	Allows an administrator to issue an item to a staff member at any site
Issue to Students	Allows an administrator to issue an item to a student at any site
Print Tags	Allows an administrator to print new asset tag labels (with new tag numbers) by defining a tag header, setting margins, and selecting print quantity. Tags are affixed to each tracked item.
Quick Collect	Allows an administrator to collect items that were issued to staff or students by assigning a room or transfer at any site
Status Import	Allows an administrator to change the status of a group of tags listed on a spreadsheet. Supported status changes include "Auctioned," "Disposed," "In Repair," "In Use," "Recycled," "Returned to Vendor," "Sold," "Surplus," and "Used for Parts."

Description	
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

Description	
Asset Conditions	Condition categories sites utilize when indicating how much damage an asset has taken in its lifecycle
Charge Types	Charge categories sites utilize when assessing a charge to an item for damages or as a prerequisite before an item is issued
District Settings	Allows the customizations of Asset Management to district-specific procedures and policies
Email Notifications	Allows an administrator to specify which email notifications will be sent to users
Funding Sources	Funding categories used to associate each asset with the funding source utilized for purchase
Integration Settings	Follows an administrator to integrate with the Asset Management system data from G Suite for Education and JAMF MDM systems

Description	
Model End of Life	Allows an administrator to manage end-of-life information for items in the catalog
Report Settings	Allows an administrator to customize verbiage for distribution and collection receipts, as well as audit compliance reports
Room Types	General categories used to label different kinds of rooms within a site
Users	Allows an administrator to manage individuals who are granted access to Asset Management
Vendors	Anyone and/or any company that provides goods or services to your district; similar to a supplier

Navigation Bar

Note: View of many dashboard elements is dependent on access given to the logged-in user.

Description	
 Home	Displays district-provided logo, switch-to-site drop-down menu, tag-related detailed graphs, district-wide inventory statistics, and Mobile-IT Setup

Description	
 Catalog	Displays product details within the district and respective location information, and provides access to preconfigured product reports
 Purchasing	Allows an administrator to record essential purchasing data, assign tag numbers, and receive items to sites and rooms
 Sites	Displays the physical locations defined by the district and provides access to preconfigured site inventory reports
 Tags	Allows an administrator to use “Basic” and “Advanced” filters to search for tags and save, share, view, and print reports based on respective filters
 Audits	Allows an administrator to initiate, view the progress of, and reconcile inventory audits
<p>Quick Search</p> 	Allows a user to quickly search for a specific tag, serial number, student, or staff member
 Help	Takes user to the Frontline Learning Center to access articles and videos for various learning and troubleshooting tasks
 Log Out	Removes the user from the current session

Panel Display Reports

Note: Items in panel charts are interactive and can be toggled on and off. Click any active item in the key to turn it off. Click any inactive item in the key to turn it on.

Description	
Quadrant	There are four (4) quadrants allowing the user to customize the dashboard with preconfigured reports. The user can determine the order of panel quadrants in the dashboard. The user's customized preferences are applied to any site they have permissions.
 Panel Settings	Allows users to customize dashboard panel view to display one of many preconfigured reports, including statistics, notifications, and login information
None	Quadrant is left blank
Notifications	Shows audits, tags, transfers, and tickets created, and provides links to actionable items
Purchasing: Outstanding Tags to Receive	Shows quantity of tags waiting to be received on a purchase order. Filters include "Tagging Overdue By" and "Purchase Date Range."
Inventory Statistics	Shows quantity and monetary value of all or select inventory ("Total," "Available," and "In Use"). Filters include Regions (if enabled), Sites, and Product Types. Downloadable .csv file available.

Description	
New Tags Received	Displays new tags received. Filters include Product Types, Funding Sources, and Date Range. Downloadable .csv file available.
Site Transfer	Displays transfers, as selected by user. Filters include Transfer Type, Origin Site, Destination Site, Funding Source, Product Type, and Date Range. Downloadable .csv file available.
Tag Distributions	Shows the breakdown of tag locations by percentage/quantity
Tag Status Change Over Time	Shows the trend of tags, according to selected status, over a period of time. Filters include Status and Date Range.
Tag Status Breakdown (Rooms)	Shows status of tags allotted to rooms across the district
User Login	Displays user login statistics. Filters include Region (if enabled), Site, User Role, User Type, and Date Range. Downloadable .csv file available.

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.

When entering a serial number in the Tag/Serial search field, clicking the  **Begin Search** icon or pressing the **Enter** key on the keyboard opens a dialog box showing the serial number and item description.

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.

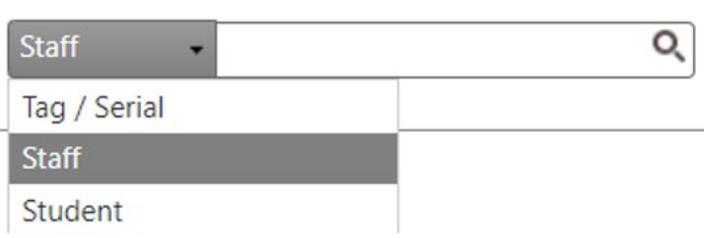
Search for a Serial Number

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.

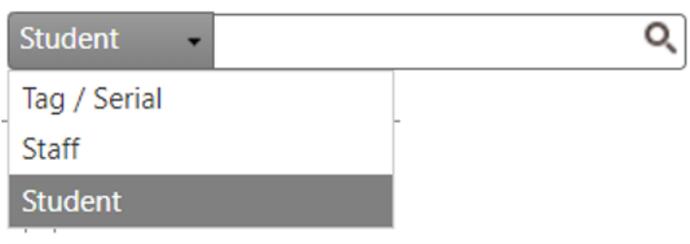
Search for a Staff Member



Tag / Serial	Staff
	Staff
	Student

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



The screenshot shows a search interface with a dropdown menu. The dropdown menu is open, showing options: 'Student', 'Tag / Serial', 'Staff', and 'Student'. The 'Student' option at the bottom is highlighted in a dark grey color. To the right of the dropdown is a search input field with a magnifying glass icon.

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 Information

Tag/Serial:

✔ [Quick Verify](#)

Select Action... ▼

Detail	Status History	Audit History	Ticket History	Components	Attachments
Tag: T28358				Device Name:	
Serial: 8685987				External IP:	
Site: Charles Bailey HS				Internal IP:	
Location: Room: 600				Last Login Date:	
Asset Type: Standalone				Last Login User:	
Status: Available				Last Seen Date:	
Scan Date: 02/10/2021				LAT/LONG:	
RFID: Not Enabled				MAC Address:	
				MDM Status:	
				OS:	
				Asset Condition: Excellent	
				Due Date:	
Tag Notes:					



- **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

Funding Information:

Source: Initial	Account Code:
Order Number:	Purchase Date: 01/01/2018
Vendor:	Purchase Price: \$259.99
Funding Source: 1300-Technology	Invoice Date:
FRN:	Invoice Number:
State Funding:	Expiration Date: 01/01/2023
Federal Funding:	

- **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 Information:

Product: 24" ViewSonic VG2456 LED 	
Number: 2000031 	
Product Type: Monitor	
Manufacturer: ViewSonic	
Model: VG2456	
Suggested Price: \$260.00	
Product Notes: <input type="text"/>	

- **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

Tag Information ✕

Tag/Serial: ✔ Quick Verify Select Action... ▾

Detail	Status History	Audit History	Ticket History	Components	Attachments
	Status: Available Source: Room: 600 Status Notes: Clearing out old rooms			Site: Charles Bailey HS Destination: Room: 600 Scan Date: 02/10/2021 Scan By: Gena Admin	
	Status: Available Source: Room: Old1000 Status Notes:			Site: Charles Bailey HS Destination: Room: 600 Scan Date: 02/10/2021 Scan By: Gena Admin	
	Status: Disposed Source: Room: Old1000 Status Notes: DATA IMPORT 2020-11-26			Site: Charles Bailey HS Destination: Room: Old1000 Scan Date: 11/26/2020 Scan By: system	

⏪ ⏩ 1 ⏪ ⏩
Page size: 10 ▾
3 items in 1 pages

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

Tag Information ✕

Tag/Serial:

✔ [Quick Verify](#)

Detail	Status History	Audit History	Ticket History	Components	Attachments
❌ Missing	Audit Date: 2/17/2021 6:18:01 PM Created By: Gena Admin Action Taken: Ignored Performed By: Gena Admin	Expected Location: Charles Bailey HS Room: 600 Audit Location: Charles Bailey HS Room: 600			

⏪ ⏩ 1 ⏪ ⏩

Page size:

1 items in 1 pages

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

Tag Information ✕

Tag/Serial:
✓ [Quick Verify](#)
Select Action... ▾

Detail
Status History
Audit History
Ticket History
Components
Attachments

Component Tag:

Components

🔄
Transfer All Components

Product Name	Product Type	Tag	Serial	Action
Dell Latitude 3301	Laptop	5354	KL9R468	✖ 🔄
Dell Latitude 3301	Laptop	5356	KL9R469	✖ 🔄
Dell Latitude 3301	Laptop	5357	KL9R470	✖ 🔄

- 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

Tag Information ✕

Tag/Serial:
✓ [Quick Verify](#)
Select Action... ▾

Detail
Status History
Audit History
Ticket History
Components
Attachments (1)

+
Add Attachment

📄

File Name: [Example Police Report.pdf](#)

File Size: 53.59 KB

Notes:

Date Attached: 2/13/2023 11:07:10 AM

Attached By: District Admin

-

⏪
⏩
1
⏴
⏵

Page size:

1 items in 1 pages

- Each attached file

EDUCATIONAL TECHNOLOGY

May 2024

Page **20** of **387**

- **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	<ul style="list-style-type: none"> Collect: Not Allowed

Status	Location	Status Change
		<ul style="list-style-type: none"> • Transfer: All Statuses <i>except</i> Lost & Stolen • Direct Change: Any Status
In Use	Issued to Staff/Student	<ul style="list-style-type: none"> • Collect: Any Status • Transfer: Not Allowed • Direct Change: Not Allowed
In Use	Room/Site	<ul style="list-style-type: none"> • Collect: Not Allowed • Transfer: Any Status <i>except</i> Lost & Stolen • Direct Change: Any Status
Actioned, Disposed, Recycled, Sold, Stolen, Returned to Vendor, Used for Parts	Room/Site	<ul style="list-style-type: none"> • Collect: Any Status • Transfer: Any Status <i>except</i> Lost & Stolen

Status	Location	Status Change
		<ul style="list-style-type: none"> • Direct Change: Not Allowed
Surplus	Room/Site	<ul style="list-style-type: none"> • Collect: Any Status • Transfer: Any Status except Lost & Stolen • Direct Change: Auctioned, Disposed, Recycled
In Repair, Lost	Issued to Staff/Student	<ul style="list-style-type: none"> • Collect: Any Status • Transfer: Any Status except Lost & Stolen • Direct Change: In Use
In Repair, Lost	Room/Site	<ul style="list-style-type: none"> • 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 Administrative User Dashboard

Asset Management allows each user with "Administrative View" permissions to customize the reports in each  **Home** dashboard panel, as well as change or update  **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 **New Tags Received** for a graph of recently received assets.

3. Filter information, if required.
4. Click on  **Save**. The dashboard updates to reflect the changes.

Audits

Audits Overview

The Audits page provides the site level the ability to view administrative-created audits (respective to the site) and the progress of room audits as they move to different statuses. Only the administrative level takes actions on "Scan Complete" administrative-created audits.

View Site Audits

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

Filters  allow the administrative level to search for specific tag information to identify tags available to reconcile (at least one filter must be selected).

Filters			
Audit Name:	Please search: <input type="text"/>	Created Date:	Equal To <input type="text"/>
Site:	Please select: <input type="text"/>	Audit Due Date:	Equal To <input type="text"/>
		Last Modified Date:	Equal To <input type="text"/>
		Progress:	2 items checke <input type="text"/>
		Compliance:	Please select: <input type="text"/>
		Police Report Required:	Please select: <input type="text"/>

Filter	Description
Audit Name	Unique alpha/numeric assignment to a district-created audit
Site	Single-select drop-down menu containing a list of each site by name within Asset Management
Created Date	Displays the date the audit is created by the administrative level

Filter	Description
Audit Due Date	Displays the date when the audit must be completed
Last Modified Date	Displays the last date any room audit within the respective site has been modified (includes changing the audit status)
Progress	Displays the percentage of room audits, respective to the site, in the room audit status of "Scanned" or "Reconciled," or if the site "Closed" the site audit
Compliance	Displays the compliance status of the sites regarding the audit
Police Report Required	Displays the requirements regarding a police report for tags in the status of "Lost" or "Stolen"

The "Filter Results" grid is located below the filters section and displays a list of audits based on the choices selected in the **Progress** filter.

Audit Name	Created Date	Audit Due Date	Last Modified Date	New	In Progress	Scan Complete	Closed	Progress ?	Compliance ?	Actions
Last Modified Test	03/09/2021		03/09/2021	0	0	9	0	100% Scanned		
Summer 2021 District Audit	05/06/2021		05/06/2021	40	0	0	0	0% Scanned		
Summer 2021 District Audit	05/06/2021		05/06/2021	49	0	0	0	0% Scanned		

⊕ Add Record ⚙ Edit Columns ✉ E-Mail Compliance Report Please Select Audit Report...

⏪ ⏩ 1 ⏴ ⏵ Page size: 10 3 items in 1 pages

Function	Description
 Add Record	Begins the "Initiate Site Audit" process
 Edit Columns	Allows an administrator to select which columns to display on the "View Site Audits" grid and in what order they display Available fields include "Audit Name," "Created Date," "Audit Due Date," "Last Modified Date," "New," "In Progress," "Scan Complete," "Closed," "Progress," "Compliance," "Action," "Site," "Inventory," "Verified," "Missing," "Misplaced," "Police Report," "First Scan Date," and "% Scanned."
 Email Compliance Report	Allows an administrator to e-mail a copy of the "Compliance Report" to the audit creator, audit approver, primary site contact, or other specified e-mail addresses
Audit Name	Unique alpha/numeric designation of an administrative audit
Site	Single-select drop-down menu containing a list of each site by name within Asset Management
Created Date	Displays the date the audit is created by the district level
Audit Due Date	Displays the date when the audit must be completed. Audits not completed/marked as "Scan Complete" by the due date appear in red.

Function	Description
Last Modified Date	Displays the last date any room audit within the respective site has been modified (includes changing the audit status)
New	Displays the number of room audits created, respective to the site, and the filters set during the site audit creation
In Progress	Displays the number of room audits, respective to the site, in the room audit status of "In Progress"
Scan Complete	Displays the number of room audits, respective to the site, in the room audit status of "Scan Complete"
Closed	Displays the number of room audits, respective to the site, in the room audit status of "Closed"
Progress	Displays the percentage of room audits, respective to the site, in the room audit status of "Scanned" or "Reconciled," or if the site "Closed" the site audit
Compliance	Displays the compliance status of the sites regarding the audit

Actions Column

Function	Description
 Sync Found Items	Matches up missing tags from a current audit with misplaced tags on administrative-initiated

Function	Description
	"Approved" audits, and updates their status to "Found"
 District Audit Details	Opens the "District Audit Details" window; lists each room audit created by the district and their respective tag audit state information
Audit Detail Report	Provides, in CSV format, a list of tags and their last audit state from room audits located in the respective administrative-created site audit ("Site ID," "Site Name," "Region," "Tag," "Asset Type," "Parent Tag," "Serial Number," "Audit State," "Audit Scan Date," "Audit Scan By," "Audit Location," "Expected Location," "Location Type," "Grade," "Audit Date," "Audit By," "Audit Notes," "Audit Status," "Action Taken," "Product Number," "Product Name," "Model," "Manufacturer," "Product Type," "Inventory Status," "Tag Notes," "Order Number," "Funding Source," "Department," "Purchase Price," and "Facility ID")
 Audit Compliance Report	Allows users to e-mail a copy of the "Audit Compliance Report" (PDF format)

Reconcile Audits

Reconcile Audits, located in the top navigation bar under  **Audits**, allows site administrators to change tag statuses (located within "Scan Complete" audits) based on the filtered results of the respective room audit (includes administrative-initiated audits for the site).

Basic Filters  allow the site administrator to search for specific tag information to identify tags available to reconcile (at least one filter must be selected).

Basic Filters					
Audit Name:	Please select: <input type="text"/>	Site Name:	Please select: <input type="text"/>	Funding Source:	Please select: <input type="text"/>
Tag Audit State:	Please select: <input type="text"/>	Expected Location Site:	Please select: <input type="text"/>	Product Type:	Please search: <input type="text"/> 
Location Audit Status:	Please select: <input type="text"/>	Expected Location Type:	Please select: <input type="text"/>	Asset Type:	Please select: <input type="text"/>
Action Taken:	Please select: <input type="text"/>	Tag Status:	Please select: <input type="text"/>		

Filter	Description
Audit Name	Drop-down menu containing a list of available audits with Asset Management for the respective site
Tag Audit State	Multi-select drop-down menu containing a list of available tag audit states within Asset Management ("Found," "Misplaced," "Missing," and "Verified")
Location Audit Status	Multi-select drop-down menu containing a list of audit statuses (includes "Scan Complete," "In Progress," and "New")
Action Taken	Multi-select drop-down menu containing a list of actions ("No Action Taken," "Ignored," "Transfer to Room," "Transfer to Staff," "Transfer to Student," "Auctioned," "Disposed," "Lost," "Recycled," "Returned to Vendor," "Sold," "Stolen," "Surplus," and "Used for Parts")
Site Name	Multi-select drop-down menu containing a list of each site

Filter	Description
Expected Location Site	Multi-select drop-down menu containing a list of possible matching audit site categories ("Matches Audit Site" and "Does Not Match Audit Site")
Expected Location Type	Multi-select drop-down menu containing a list of location types ("Room," "Staff," and "Student")
Tag Status	Multi-select drop-down menu containing a list of tag statuses ("Auctioned," "Available," "Disposed," "In Repair," "In Transit," "In Use," "Lost," "Pending Transfer," "Recycled," "Returned to Vendor," and "Sold")
Funding Source	Multi-select drop-down menu of financial resources used to purchase an item
Product Type	Filter for a product type within Asset Management
Asset Type	Multi-select drop-down menu containing a list of tag component associations ("Standalone," "Parent," or "Component")

Advanced Filters  allow the site administrator to search for specific tag information to identify tags available to reconcile (at least one filter must be selected).

Advanced Filters

Tag List ?

Audit Date:	Equal To	<input type="text"/>		
Audit Due Date:	Equal To	<input type="text"/>		
Last Scan Date:	Equal To	<input type="text"/>		
Price:	Equal To	<input type="text" value="Enter a dollar amount."/>		
Include Site Audits:	<input type="checkbox"/>			
Show Only Approved:	<input type="checkbox"/>			

Filter	Description
Tag/Serial List	Filter for a specific tag or serial number for reconciliation
Audit Date	Calendar tool excluding all audited tags respective to the time frame indicated
Audit Due Date	Calendar tool limiting all audited tags with due dates respective to the time frame indicated
Last Scan Date	Calendar tool limiting all audited tags respective to the time frame indicated
Price	Filter respective to each tag's purchase price (may be different from the product's suggested price)
<input type="checkbox"/> Include Site Audits	When selected, displays the most recent tag audit state per tag, regardless of whether it was a site-level audit or an district-created audit

EDUCATIONAL TECHNOLOGY

May 2024

Page **34** of **387**

Filter	Description
<input type="checkbox"/> Show Only Approved	When selected, displays tag audit state information only within administrative-created audits approved by the site level

The "Reconcile Filter Results" grid is located below the filters section and displays a list of audits, based on the choices selected in the "Progress" filter.

0 item(s) selected Edit Columns Reconcile Please Select Audit Report... ▾										
<input type="checkbox"/>	Audit State	Tag	Product Name	Tag Status	Funding Source	Last Scan Date	Expected Location	Audit Location	Audit Date	Actions
<input type="checkbox"/>	Missing	7559	77" StarBoard FX TRIO	Available	0902-Cares Act	02/02/2021	Grayson Elementary Room: 900	None		
<input type="checkbox"/>	Missing	7560	77" StarBoard FX TRIO	In Use	0902-Cares Act	01/07/2021	Grayson Elementary Room: 603	None		

Function	Description
Items Selected	Provides a count of tags selected for reconciliation
 Edit Columns	<p>Allows an administrative user to select which columns display on the "Reconcile Audits" grid and in what order they display</p> <p>Available fields include "Audit State," "Tag, Actions," "Asset Type," "Audit Date," "Audit Due Date," "Audit Location," "Expected Location," "Funding Source," "Last Scan Date," "Product Name," "Product Type," "Serial," and "Tag Status"</p>
 Reconcile	Opens the "Reconcile Inventory" window and allows an administrative user to take action in bulk on the filtered tags
Audit State	Displays respective tag audit states (includes "Missing," "Misplaced," and "Verified")

Function	Description
Tag	Unique identifier affixed to each item (an asset tag or an Asset Management-created tag number) and used to track individual items within Asset Management
Product Name	Name of the product
Tag Status	Current status of the tag
Funding Source	Financial resources used to purchase an item
Last Scan Date	Calendar tool limiting all audited tags respective to the time frame indicated
Audit Due Date	Calendar tool limiting all audited tags with due dates respective to the time frame indicated
Expected Location	Current location associated with the tag
Audit Location	Location where the tag was found during an audit
Audit Date	Displays the date the audit was conducted
Action	Line-item tool to reconcile the respective tag with the available reconciliation options
 Reconcile Audit Note	Appears when a note was recorded when a tag audit state of "Missing" or "Misplaced" was reconciled, or if the site made a note on the respective room audit (mousing over the icon will display the specific note)

District Audit Details

The "District Audit Details" window allows the site level to view all room audits created by the administrative level and the site's progress in performing the respective site audit. This window also allows the site level to "Approve" a site audit's results (communicating to the district level the site is ready for the district to reconcile the audit's results). The "Room Types," "Staff Types," and "Grades" fields are dependent on the **Audit For** selection.

District Audit Details

Audit Details		
Audit Name: Last Modified Test	Product Types: All	Ignore Tags Modified Date:
Audit For: Room	Room Types: All	New: 0
Created Date: 03/09/2021		In Progress: 0
Last Modified Date: 03/09/2021		Scan Complete: 9

Please Select Audit Report... Refresh								
Location	Status ?	Modified Date	Inventory	Verified	Found	Missing	Misplaced	Actions
<input type="text"/>	All items checked							
Room: 100	Scan Complete	03/09/2021	0	0	0	0	0	 
Room: 101	Scan Complete	03/09/2021	0	0	0	0	0	 

Function	Description
Audit Name	Unique alpha/numeric assignment to an administrative-created audit
Audit For	Specifies what is included in the audit; can include individual selections or combination of rooms, staff, and/or students

Function	Description
Created Date	Displays the date the audit was created
Last Modified Date	Displays the last date any room audit within the site audit was modified
Audit Due Date	Displays the date the audit must be completed
Product Types	Displays what product types are included in the audit
Room Types	Displays what room types are included in the audit
Staff Types	Displays what staff types are included in the audit
Grades	Displays the grade level assigned to staff members/students
Ignore Tags Modified Date	Displays the cutoff date for modified tags to be included in the audit
New	Displays the number of room audits created, respective to the site, in the audit status of "New"

Function	Description
In Progress	Displays the number of room audits, respective to the site, in the room audit status of "In Progress"
Scan Complete	Displays the number of room audits, respective to the site, in the room audit status of "Scan Complete"

District Audit Grid

Function	Description
 Approve Audit	Marks all room audits within the site audit as "Approved" (also moves all room audits to "Finalized") and no longer allows room audits to be denied or edited
Approve Audit OR Complete Scan (Move to Reconcile)	Marks all room audits within the site audit as "Approved" (also moves all room audits to "Scan Complete") and no longer allows audits to be denied or edited
 Reopen Audit	Changes all "Scan Complete" room audits

Function	Description
	within the site audit back to the status of "In Progress" for continued editing
 Edit	Located in each audit's row; the process by which a site may edit/add tags to the respective audit
Location	Displays whether the line item is a room, staff, or student (up to 13 alpha/numeric characters)
Status	State of the audit ("New," "In Progress," "Scan Complete," and "Closed")
Modified Date	Displays the last date the room audit was modified
Inventory	Displays the inventory quantity of the tags located in the room

Function	Description
Verified	Displays the inventory quantity of the tags that were verified in the room
Missing	Displays the inventory quantity of the tags that were not verified as located in the room
Found	Displays the inventory quantity of the tags that were expected to be located in this room but were located in another room
Misplaced	Displays the inventory quantity of the tags that were located in this room yet expected to be located in another room
 Audit Details	Action that allows the site level to add notes to each "Missing" and/or "Misplaced" tag while displaying the "Room Audit Details" ("Audit Status," "Last Modified Date," "Last Modified By," "Created

Function	Description
	Date," "Created By," "Scan Complete Date," "Scan Complete By," "Audit Inventory," "Initiated By," "Approved By," "Approved Date," "Verified," "Found," "Missing," "Misplaced," detailed product information, "Tag Number," and "Tag Details"
<p>Room Audit Summary Report</p>	For "Rooms"; 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 On," "Audit Inventory" ("Verified," "Found," "Missing," "Misplaced"), "State," "Product," "Tag," "Asset Type," "Expected Location," "Audit Location," and "Action Taken"
<p>Staff Audit Summary Report</p>	For "Staff"; includes "Staff ID," "Staff Name," "Staff Type," "Site Name," "Date Printed," "Status,"

Function	Description
	<p>"Created By," "Created Date," "Last Modified By," "Last Modified Date," "Initiated By," "Approved By," "Approved Date," "Scan Complete By," "Scan Completed On," "Audit Inventory" ("Verified," "Found," "Missing," "Misplaced"), "State," "Product," "Tag," "Asset Type," "Expected Location," "Audit Location," and "Action Taken"</p>
<p>Student Audit Summary Report</p>	<p>For "Students"; includes "Student ID," "Student Name," "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 On," "Audit Inventory" ("Verified," "Found," "Missing," "Misplaced"), "State," "Product," "Tag," "Asset Type," "Expected Location," "Audit Location," and "Action Taken"</p>

Audits Reports

The **Audits** page provides reports to be view/printed that compile information from multiple audits for viewing in one report.

Under "Please Select Audit Report"

Function	Description
Full Compliance Report	Provides, in PDF format, an outline for each approved/closed audit on the "View Site Audits" grid. The report includes "Audit Name," "Inventory," "Verified," "Missing," "Misplaced," "Created Date," "Approved Date," and "Completed Date."
Audit Listing	Provides, in CSV format, a list of all the administrative-initiated audits across all sites, based on the filters applied to the "View Site Audits" grid. This report includes "Audit Name," "Site," "Created Date," "Last Modified Date," "Audit Due Date," "New," "In Progress," "Scan Complete," "Closed," and "Progress."

Under "District Audit Details"

Function	Description
District Audit Listing Report	Provides, in CSV format, a breakdown of the results of an entire district-initiated audit, based on the filters applied to the "District Audit Details" grid. This report includes "Location," "Status Modified Date," "Inventory," "Verified," "Found," "Missing," "Misplaced," "Audit Due Date," "Approved By," "Approved Date," "Scan Completed By," "Scan Completed Date," "Total

Function	Description
	Inventory," "Total Verified," "Total Found," "Total Missing," and "Total Misplaced."

Under "Reconcile Audits"

Function	Description
Audit Details Report	Provides, in CSV format, a filtered list from room audits of tags and their last audit state. This report includes "Site ID," "Site Name," "Tag," "Asset Type," "Parent Tag," "Serial Number," "Audit State," "Audit Scan Date," "Audit Scan By," "Audit Location," "Expected Location," "Location Type," "Grade," "Audit Date," "Audit Due Date," "Audit By," "Audit Status," "Action Taken," "Product Number," "Product Name," "Model," "Manufacturer," "Product Type," "Tag Status," "Tag Notes," "Order Number," "Funding Source," "Department," "Purchase Price," and "Facility ID."
Closed Audit Details Report	Provides, in CSV format, a filtered list from closed room audits of tags and their last audit state. This report includes "Site ID," "Site Name," "Tag," "Asset Type," "Parent Tag," "Serial Number," "Audit State," "Audit Scan Date," "Audit Scan By," "Audit Location," "Expected Location," "Location Type," "Grade," "Audit Date," "Audit Due Date," "Audit By," "Audit Status," "Action Taken," "Product Number," "Product Name," "Model," "Manufacturer," "Product Type," "Tag Status," "Tag Notes," "Order Number," "Funding Source," "Department," "Purchase Price," and "Facility ID."

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 and in the Administrative View. 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.

District Initiated Audits for Learning ISD

Filters

Audit Name:

Site:

Created Date: Equal To

Audit Due Date: Equal To

Last Modified Date: Equal To

Progress: 2 items checked

Compliance: Please select:

Police Report Required: Please select:

Please Select Audit Report...

Audit Name	Created Date	Audit Due Date	Last Modified Date	New	In Progress	Scan Complete	Closed	Progress ?	Compliance ?	Actions
Winter 2023 - Staff Grayson Elementary	01/30/2023		01/30/2023	0	0	2	19	50% Reconciled		<input type="button" value="📄"/> <input type="button" value="🔗"/> <input type="button" value="🔄"/> <input type="button" value="📧"/>
Jackson Staff - Winter 2023	01/30/2023		01/30/2023	7	2	11	0	55% Scanned		<input type="button" value="📄"/> <input type="button" value="🔗"/> <input type="button" value="🔄"/> <input type="button" value="📧"/>
Ridgemont MS - Winter 2023 Student	01/30/2023		01/30/2023	7	1	52	0	87% Scanned		<input type="button" value="📄"/> <input type="button" value="🔗"/> <input type="button" value="🔄"/> <input type="button" value="📧"/>
Grayson Front Office - Feb 2023	02/01/2023		02/01/2023	2	1	7	0	70% Scanned		<input type="button" value="📄"/> <input type="button" value="🔗"/> <input type="button" value="🔄"/> <input type="button" value="📧"/>

- Click on the respective audit's row. The District Audit Details window opens.
- Search for the respective room, staff, or student. *The location column is searchable. Enter/scan the respective room, staff, or student.
- Click  **Edit**, located on the respective row. The Room Audit window opens.
- Enter/scan each tag number expected for the room, staff, or student into the Enter Tag field.
- 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.

Audit Scan Results



Tag Details

Tag: T30722	Product Name: Lenovo IdeaPad N20P
Serial: 987736180	Product Type: Laptop
Status: In Use	Funding Source: 1300-Technology

Tag is marked as  **Missing** on this audit

Tag is expected to be in the hands of
Staff: [Kellie E Egli](#) at **Grayson Elementary**



Verify Tag



Mark Tag as Misplaced



Update Tag Location

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.

Update Tag Location

Expected Location:	Staff: Kellie E Egli
Transfer To:	Room
Room Number:	801-NRS
Room Description:	Nurse
Collect to Status:	Available
Status Notes:	

Note: Updating the location of the tag will mark it as 'Misplaced' on this audit.



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.

Audit Scan Results



Tag Details

Tag: T4039	Product Name: Brother MFC-L2707DW
Serial: U63310F2F000627	Product Type: Printer
Status: In Use	Funding Source: 0902-Cares Act

Tag is marked as Missing on this audit

Tag is expected to be in
Room: 804-Rcpt at **Grayson Elementary**



Mark Tag as Misplaced



Transfer to Staff or Student

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.

Transfer Tag to Staff or Student



Expected Location:	Room: 804-Rcpt
Transfer To:	Staff
Staff ID:	107814
Staff Name:	Sandra M Hardy
Audit Notes:	

Note: Updating the location of the tag will mark it as 'Misplaced' on this audit.



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.

Initialize Room Inventory

When an asset with a tag is found in a room during a Room Audit, but the tag does not exist in the system, it can be added directly from the Room Audit window by selecting **Initialize Room Inventory**. After entering the Tag the Room audit, the system will display "Tag not in System".

Room Audit



Tag not in system

 Initialize Room Inventory

Product	Type	Price	Inventory
---------	------	-------	-----------

1. Click  **Initialize Room Inventory**. The Initialize Room Inventory window opens.

Initialize Room Inventory

Done

Location Details

Site: Grayson Elementary

Room: 804-Rcpt

Add New Product

Product Number:

Product Name:

Funding Source:

Status:

Tag:

Serial:

Scan History for Today:

Product	Tag	Serial	Status	Funding Source	Actions
No records to display.					
Page size: <input type="text" value="10"/>					0 items in 1 pages

Note: Initialized Inventory will be added as 'Verified' on audit

2. Enter/scan each product number into the Product Number field or click the binocular icon to Search for the product number.
3. Select the funding source from the Funding Source dropdown menu.
4. Select the status from the Status dropdown menu.
5. Enter the custom field information, if applicable.
6. Enter/scan the tag number in the Tag field. If you type in the Tag, hit **<ENTER>** to allow the system to verify it is a unique tag number.
7. Enter/scan the serial number in the Serial field, if required.
8. Click **Save**.
9. Click **Done** to close the Initialize Room Inventory window.

Initialize Staff Inventory

When an asset with a tag is found during a Staff Audit, but the tag does not exist in the system, it can be added and assigned directly to a staff member from the Staff Audit window

by selecting Initialize Inventory to Staff. After entering the tag to the Staff audit, the system will display “Tag not in System”

Staff Audit ✕

✔
Tag not in system

Staff: [Kim Phipps](#)
[804-Rcpt](#)

🔍
Initialize Inventory to Staff

Product	Type	Price	Inventory	Verified	Found	Missing	Misplaced	Actions
No records to display.								

1. Click 🔍 **Initialize Inventory to Staff**. The Initialize Staff Inventory window opens.
2. Enter/scan each product number into the Product Number field or click the binocular icon to search for the product number.
3. Select the funding source from the Funding Source dropdown menu.
4. Select the status from the Status dropdown menu.
5. Enter the custom field information, if applicable.
6. Enter/scan the tag number in the Tag field. If you type in the Tag, hit **<ENTER>** to allow the system to verify it is a unique tag number.
7. Enter/scan the serial number in the Serial field, if required.
8. Click ✕ **Done** to close the Initialize Staff Inventory window.

Initialize Student Inventory

When an asset with a tag is found during a Student Audit but the tag does not exist in the system, it can be added and assigned directly to a student from the Student Audit window by selecting **Initialize Inventory to a Student**.

After entering the tag to the Student audit, the system will display “Tag not in System.”

Student Audit ×

 Student: Todd R Spitsnaugle 

Tag not in system

 **Initialize Inventory to Student**

Product	Type	Price	Inventory	Verified	Found	Missing	Misplaced	Actions
No records to display.								

⏪ ⏩ 1 ⏪ ⏩

Page size:
0 items in 1 pages

1. Click on  **Initialize Inventory to Student**. The Initialize Student Inventory window opens.
2. Enter/scan each product number into the Product Number field or click the binocular icon to search for the product number.
3. Select the funding source from the Funding Source dropdown menu.
4. Select the status from the Status dropdown menu.
5. Enter the custom field information, if applicable.
6. Enter/scan the tag number in the Tag field. If you type in the Tag, hit **<ENTER>** to allow the system to verify it is a unique tag number.
7. Enter/scan the serial number in the Serial field, if required.
8. Click  **Done** to close the Initialize Student Inventory window.

Create a New Product

When an asset found during a Room, Staff or Student Audit does not appear in your catalog, site administrators or users can add product if it has been defined at the district level using the Create New Product feature from the Initialization window.

1. After receiving the message that the Tag is not in the system, click  **Initialize Room Inventory**. The Initialize Room Inventory window opens.
2. Click **Add New Product**. The Create New Product fields open within the Initialize Room Inventory window.
3. Enter the Product details. Red fields are required information.

4. Click  **Save**, located at the bottom of the window.

Site Audit Overview

The Audits page provides users at the site level the ability to view administrative-created audits (respective to their site) and the progress of the room audits as they move to different statuses. Only the administrative level takes actions on "Scan Complete" administrative-created audits.

Note:

- *When running the "Audit Detail" report, if "Arrange by Audit Information" is selected, the columns "Audit Status," "Audit State," "Action Taken," and "Status" appear at the beginning of the spreadsheet.
- For districts with the "Departments" feature installed and enabled, the "Room," "Staff," and "Student" audit windows will display the "Department" field when the product row is expanded. "Department" will then be included on the "Audit Detail" report.
- *The "E-Mail Staff to Audit Homerooms" option is only available if "Audit For: Room" is selected.
- *The "E-Mail Staff to Audit Inventory" option is only available if "Audit For: Staff" is selected. Staff members must be active and have a valid e-mail in their Staff profile in order to receive an e-mail.
- "Reconcile Audits" is only available when "Restrict from Reconciling District Initiated Audits" has been disabled by the administrator. Site administrators must have room-view access to reconcile audits. The "Collect Transfer to Staff" and "Transfer to Student" actions are only available to site administrators with the ability to add/edit rooms, students, and staff.
- On the "View Site Audits" and "District Audit Details" grids, hover the mouse over a help icon to view additional information about a topic.

View Site Audits

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

Basic Filters

"Basic Filters" allow the administrative level to search for specific tag information to identify tags available to reconcile (at least one filter must be selected).

Filter	Description
Audit Name	Unique alphanumeric assignment to a district-created audit
Created Date	Displays the date the audit was created by the administrative level
Audit Due Date	Displays the date by which the audit must be completed
Last Modified Date	Displays the last date any room audit within the respective site has been modified (includes changing the audit status)
Progress	Displays the percentage of room audits, respective to the site, in the room audit status of "Scanned" or "Reconciled," or if the site "Closed" the site audit
Compliance	Displays the compliance status of the sites related to the audit
Police Report Required	Displays the requirements regarding a police report for tags in the status of "Lost" or "Stolen"

View Site Audits Grid

The "View Site Audits Grid" is located beneath Basic Filters on the "Audits" grid.

Filter	Description
Show Closed	Displays closed audits within the audit grid
 Edit Columns	<p>Located at the top of the "View Site Audits" grid, allows an administrator to select which columns display on the "View Site Audits" grid and in what order they display</p> <p>Available fields include Audit Name, Created Date, Audit Due Date, Last Modified Date, New, In Progress, Scan Complete, Closed, Progress, Compliance, Action, Site, Inventory, Verified, Missing, Misplaced, and Police Report</p>
 E-Mail Compliance Report	<p>Located at the top of the "View Site Audits" grid, allows an administrator to e-mail a copy of the Compliance Report to the audit creator, audit approver, primary site contact, or other specified e-mail addresses</p>
Audit Name	Unique alpha/numeric designation of an administrative audit
Site	Single-select drop-down menu containing a list by name of each site within Asset Management
Created Date	Displays the date the audit is created by the district level
Audit Due Date	Displays the date by which the audit must be completed. Audits not completed/marked as "Scan Complete" by the due date appear in red.

Filter	Description
Last Modified Date	Displays the last date any room audit within the respective site has been modified (includes changing the audit status)
New	Displays the number of room audits created, respective to the site, and the filters set during the site audit creation
In Progress	Displays the number of room audits, respective to the site, in the room audit status of "In Progress"
Scan Complete	Displays the number of room audits, respective to the site, in the room audit status of "Scan Complete"
Closed	Displays the number of room audits, respective to the site, in the room audit status of "Closed"
Progress	Displays the percentage of room audits, respective to the site, in the room audit status of "Scanned" or "Reconciled," or whether the site "Closed" the site audit
Compliance	Displays the compliance status of the audited sites

Actions Column

Function	Description
 Sync Found Items	Matches up missing tags from a current audit with misplaced tags on administrative-initiated

Function	Description
	"Approved" audits, and updates their status to "Found"
 District Audit Details	opens the "District Audit Details" window; lists each room audit created by the district and their respective tag audit state information
Audit Detail Report	Provides, in CSV format, a list of tags and their last audit state from room audits located in the respective administrative-created site audit (Site ID, Site Name, Region, Tag, Asset Type, Parent Tag, Serial Number, Audit State, Audit Scan Date, Audit Scan By, Audit Location, Expected Location, Location Type, Grade, Audit Date, Audit By, Audit Notes, Audit Status, Action Taken, Product Number, Product Name, Model, Manufacturer, Product Type, Inventory Status, Tag Notes, Order Number, Funding Source, Department, Purchase Price, and Facility ID) *
 Audit Compliance Report	Allows users to e-mail a copy of the Audit Compliance Report (PDF format)

Reconcile Audits

Reconcile Audits, located in the top navigation bar under "Audits," allows the site administrators to change tag statuses (located within "Scan Complete" audits) based on the filtered results of the respective room audit (includes administrative-initiated audits for the site).

Basic Filters

"Basic Filters" allow the site administrator to search for specific tag information to identify tags available to reconcile (at least one filter must be selected).

Filter	Description
Audit Name	Drop-down menu containing a list of available audits within Asset Management for the respective site
Tag Audit State	Multi-select drop-down menu containing a list of available tag audit states within Asset Management (Found, Misplaced, Missing, and Verified)
Location Audit Status	Multi-select drop-down menu containing a list of audit statuses (includes Scan Complete, In Progress, and New)
Action Taken	Multi-select drop-down menu containing a list of actions (No Action Taken, Ignored, Transfer to Room, Transfer to Staff, Transfer to Student, Auctioned, Disposed, Lost, Recycled, Returned to Vendor, Sold, Stolen, Surplus, and Used for Parts)
Room Number	Multi-select drop-down menu containing a list of each room at the site
Expected Location Site	Multi-select drop-down menu containing a list of possible matching audit site categories (Matches Audit Site and Does Not Match Audit Site)

Filter	Description
Expected Location Type	Multi-select drop-down menu containing a list of location types (Room, Staff, and Student)
Tag Status	Multi-select drop-down menu containing a list of tag statuses (Auctioned, Available, Disposed, In Repair, In Transit, In Use, Lost, Pending Transfer, Recycled, Returned to Vendor, and Sold)
Funding Source	Multi-select drop-down menu of financial resources used to purchase an item
Product Type	Filter for a product type within Asset Management
Asset Type	Multi-select drop-down menu containing a list of tag component associations (Standalone, Parent, or Component)

Advanced Filters

Advanced Filters allow the site administrator to search for specific tag information to identify tags available to reconcile (at least one filter must be selected).

Filter	Description
Tag List/Serial List	Filter for a specific tag or serial number for reconciliation

Filter	Description
Audit Date	Calendar tool excluding all audited tags respective to the time frame indicated
Audit Due Date	Calendar tool limiting all audited tags with due dates respective to the time frame indicated
Last Scan Date	Calendar tool limiting all audited tags respective to the time frame indicated
Price	Filter respective to each tag's purchase price (may be different from the product's suggested price)
<input type="checkbox"/> Include Site Audits	When selected, displays the most recent tag audit state per tag, regardless of whether it was a site-level audit or an administrative-created audit
<input type="checkbox"/> Show Only Approved	When selected, displays tag audit state information only within administrative-created audits approved by the site level

Reconcile Audits Grid

The "Reconcile Audits" grid displays tags and their audit details respective to the audit filters (defaults to display only administrative-created site audits).

Function	Description
 Edit Columns	<p>Located at the top of the "Reconcile Audits" grid, allows an administrator to select which columns display on the Reconcile Audits grid and in what order they display</p> <p>Available fields include Tag, Audit State, Actions, Asset Type, Audit Date, Audit Due Date, Audit Location, Expected Location, Funding Source, Last Scan Date, Product Name, Product Type, Serial, and Tag Status</p>
 Reconcile	<p>Opens the "Reconcile Inventory" window and allows a user to take action in bulk on the filtered tags</p>
Audit State	<p>Displays respective tag audit states (includes Missing, Misplaced, and Verified)</p>
Tag	<p>Unique identifier affixed to each item (an asset tag or an Asset Management-created tag number) and used to track individual items within Asset Management</p>
Product Name	<p>Name of the product</p>
Tag Status	<p>Current status of the tag</p>
Funding Source	<p>Financial resources used to purchase an item</p>
Last Scan Date	<p>Date the tag was last issued and/or a change of status was made in Asset Management</p>
Expected Location	<p>Current location associated with the tag</p>
Audit Location	<p>Location the tag was found during an audit</p>
Audit Date	<p>Displays the date the audit was conducted</p>

Actions Column

Function	Description
Select Action	Line-item tool to reconcile the respective tag with the available reconciliation options
 Reconcile Audit Note	Appears when a note was recorded when a tag audit state of "Missing" or "Misplaced" was reconciled or if the site made a note on the respective room audit (mousing over the icon will display the specific note)

District Audit Details

The "District Audit Details" window allows the site level to view all room audits created by the administrative level and the site's progress in performing the respective site audit. This window also allows the site level to "Approve" a site audit's results (communicating to the district level the site is ready for the district to reconcile the audit's results). The "Room Types," "Staff Types," and "Grades" fields are dependent on the "Audit For" selection.

District Audit Details Summary

Function	Description
Audit Name	Unique alpha/numeric assignment to an administrative created audit
Audit For	Specifies what is included in the audit; can include individual selections or combination of rooms, staff, and/or students

Function	Description
Created Date	Displays the date the audit was created
Last Modified Date	Displays the last date any room audit within the site audit was modified
Audit Due Date	Displays the date by which the audit must be completed
Product Types	Displays the product types included in the audit
Room Types	Displays the room types included in the audit
Staff Types	Displays the staff types included in the audit
Grades	Displays the grade level assigned to staff members/students
Ignore Tags Modified Date	Displays the cutoff date for modified tags to be included in the audit
New	Displays the number of room audits created, respective to the site, in the audit status of "New"

Function	Description
In Progress	Displays the number of room audits, respective to the site, in the room audit status of "In Progress"
Scan Complete	Displays the number of room audits, respective to the site, in the room audit status of "Scan Complete"

District Audit Grid

Function	Description
 Approve Audit	Marks all room audits within the site audit as "Approved" (also moves all room audits to "Finalized") and no longer allows room audits to be denied or edited
Approve Audit OR Complete Scan (Move to Reconcile)	Marks all room audits within the site audit as "Approved" (also moves all room audits to "Scan Complete") and no longer allows audits to be denied or edited
 Reopen Audit	Changes all "Scan Complete" room audits within the site audit back to the status of "In Progress" for continued editing

Function	Description
 Edit	<p>Located on each audit's row; the process by which a site may edit/add tags to the respective audit</p>
<p>Location</p>	<p>Displays whether the line item is a room, staff, or a student (up to 13 alpha/numeric characters)</p>
<p>Status</p>	<p>State of the audit (New, In Progress, Scan Complete, and Closed)</p>
<p>Modified Date</p>	<p>Displays the last date the room audit was modified</p>
<p>Inventory</p>	<p>Displays the inventory quantity of the tags located in the room</p>
<p>Verified</p>	<p>Displays the inventory quantity of the tags that were verified in the room</p>
<p>Missing</p>	<p>Displays the inventory quantity of the tags that were not verified as located in the room</p>

Function	Description
<p style="text-align: center;">Found</p>	<p style="text-align: center;">Displays the inventory quantity of the tags that were expected to be located in this room but were located in another room</p>
<p style="text-align: center;">Misplaced</p>	<p style="text-align: center;">Displays the inventory quantity of the tags that were located in this room yet expected to be located in another room</p>
<p style="text-align: center;"> Audit Details</p>	<p style="text-align: center;">Action – allows the site level to add notes to each "Missing" and/or "Misplaced" tag while displaying the Room Audit Details (Audit Status, Last Modified Date, Last Modified By, Created Date, Created By, Scan Complete Date, Scan Complete By, Audit Inventory, Initiated By, Approved By, Approved Date, Verified, Found, Missing, Misplaced, Detailed Product Information, Tag Number, and Tag Details)</p>
<p style="text-align: center;">Room Audit Summary Report</p>	<p style="text-align: center;">For Rooms, 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 On, Audit Inventory (Verified/Found/Missing/Misplaced), State, Product, Tag, Asset Type,</p>

Function	Description
	<p>Expected Location, Audit Location, and Action Taken</p>
<p>Staff Audit Summary Report</p>	<p>For Staff, includes Staff ID, Staff Name, Staff Type, Site Name, Date Printed, Status, Created By, Created Date, Last Modified By, Last Modified Date, Initiated By, Approved By, Approved Date, Scan Complete By, Scan Completed On, Audit Inventory (Verified/Found/Missing/Misplaced), State, Product, Tag, Asset Type, Expected Location, Audit Location, and Action Taken</p>
<p>Student Audit Summary Report</p>	<p>For Students, includes Student ID, Student Name, 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 On, Audit Inventory (Verified/Found/Missing/Misplaced), State, Product, Tag, Asset Type, Expected Location, Audit Location, and Action Taken</p>

Audit Reports

The **Audits** page provides one report to be view/printed that compiles information from multiple sites for viewing in one report.

The "Audit Listing Report" provides, in CSV format, a list of all the district-initiated audits across all sites based on the filters applied to the "View Site Audits" grid. The report includes Audit Name, Site, Created Date, Last Modified Date, New, In Progress, Finalized, Closed, and Progress.

Under "Please Select Audit Report"

Function	Description
Full Compliance Report	Provides, in PDF format, an outline for each approved/closed audit on the View Site Audits grid. The report includes Audit Name, Inventory, Verified, Missing, Misplaced, Created Date, Approved Date, and Completed Date.
Audit Listing	Provides, in CSV format, a list of all the administrative-initiated audits across all sites based on the filters applied to the "View Site Audits" grid. This report includes Audit Name, Site, Created Date, Last Modified Date, Audit Due Date, New, In Progress, Scan Complete, Closed, and Progress.

Under "District Audit Details"

Function	Description
District Audit Listing Report	Provides, in CSV format, a breakdown of the results of an entire district-initiated audit based on the filters applied to the "District Audit Details" grid. This report

Function	Description
	<p>includes Location, Status Modified Date, Inventory, Verified, Found, Missing, Misplaced, Audit Due Date, Approved By, Approved Date, Scan Completed By, Scan Completed Date, Total Inventory, Total Verified, Total Found, Total Missing, and Total Misplaced.</p>

Under "Reconcile Audits"

Function	Description
<p>Audit Details Report</p>	<p>Provides, in CSV format, a filtered list of tags and their last audit state from room audits. This report includes Site ID, Site Name, Tag, Asset Type, Parent Tag, Serial Number, Audit State, Audit Scan Date, Audit Scan By, Audit Location, Expected Location, Location Type, Grade, Audit Date, Audit Due Date, Audit By, Audit Status, Action Taken, Product Number, Product Name, Model, Manufacturer, Product Type, Tag Status, Tag Notes, Order Number, Funding Source, Department, Purchase Price, and Facility ID.</p>
<p>Closed Audit Details Report</p>	<p>Provides, in CSV format, a filtered list of tags and their last audit state from closed room audits. This report includes Site ID, Site Name, Tag, Asset Type, Parent Tag, Serial Number, Audit State, Audit Scan Date, Audit Scan By, Audit Location, Expected Location, Location Type, Grade, Audit Date, Audit Due Date, Audit By, Audit Status, Action Taken, Product Number, Product Name, Model, Manufacturer, Product Type, Tag Status, Tag Notes, Order Number,</p>

Function	Description
	Funding Source, Department, Purchase Price, and Facility ID.

Initiate Site Audit

"Site Audits" initiated at the administrative level allow for audits of "Site(s)," "Product Type(s)," "Room Type(s)," "Staff Type(s)," and "Grade(s)." These audits provide site-level users the ability to quickly identify missing/misplaced tags and at an expected/unexpected location.

Tags can only be included in one audit at a time. Until a tag has been verified or reconciled, it cannot be included in a new administrative- or site-created site audit. With this in mind, it is best practice to complete any audit that is started so that unfinished audits do not cause issues in the future.

Initiate Site Audit

1. Click on **Initiate Site Audit**, located under "Admin Tools Quick Links" menu. The "Initiate Site Audit" window opens.

Initiate Site Audit ✕

Save Preference

Save Preference As

Saved Preferences

Audit Name:	Spring 2023 District Wide
Audit For:	All items checked ▼
Audit Due Date	Select date...
Restrict Site Access:	<input type="checkbox"/>

Site(s):	Choose Site(s) for Audi ▼ AT LEAST 1 SITE MUST BE SELECTED
Product Type(s):	All items checked ▼
Room Type(s):	All items checked ▼
Staff Type(s):	All items checked ▼
Grade(s):	All items checked ▼
Verify Tags Modified After:	Select date...
E-Mail Staff to Audit Homerooms:	<input type="checkbox"/>
E-Mail Staff to Audit Inventory:	<input type="checkbox"/>

2. Enter a unique name for the site audit within the **Audit Name** field.
3. Select the location type (**Room**, **Staff**, or **Student**) in the "Audit For" drop-down menu. This selection will dictate which options appear in the remainder of the form.
4. (Optional) Select the **Audit Due Date** using the  calendar popup tool. Once set, the **Audit Due Date** cannot be changed and site users will be unable to scan tags to the audit after the due date.
5. Select **Restrict Site Access** to restrict site-level users from editing an audit, without affecting their ability to record tag information. This option will restrict site-level users from marking a location as "Scan Complete," deleting an audit, or removing items from an audit.
6. Select **Site(s)**, **Product Type(s)**, **Room Type(s)**, **Staff Type(s)**, and **Grade(s)**, if required.
7. To ignore tags modified after a specific date, select the respective date using the  calendar tool in the **Ignore Tags Modified After** field. Setting the **Verify Tags Modified After** date will set all tags in the selected status whose scan date is after the date to a "verified" condition on the audit.
8. Select **E-Mail Staff to Audit Homerooms** to e-mail staff members a notification to perform an audit of items assigned to their homeroom. The **E-Mail Staff to Audit Homerooms** option is only available if **Audit For: Room** is selected.
9. Select **E-Mail Staff to Audit Inventory** to e-mail staff members a notification to perform an audit of items assigned to them.
10. When **E-Mail Staff to Audit Homerooms** and/or **E-Mail Staff to Audit Inventory** is selected, active staff who have valid email addresses within the application will receive an e-mail that allows the staff member to run and finalize the audit for items issued to them and/or their homeroom. Staff members will receive an email with a link to their current audit. Staff members do not need to have permissions within the application to access their "Audit Page" and will be unable to access additional locations within Asset Management.

11. Click on  **GO**. After the site audit is created, the "Initiate Site Audit" window closes and displays the "View Site Audits" grid. This grid is sorted by "Created Date," displaying the most recently created audit at the top of the grid.

If one or more tags currently exist on another district-created site audit or site-created room audit, and are in the state of "Missing" or "Misplaced," those tags must be reconciled before a new administrative-created site audit can be created that includes those tags. Also, if any of the tags are located on a transfer, they must be received before an administrative-created site audit can be created that includes those tags.

If this occurs, Asset Management identifies the tag(s) blocking the creation of a new administrative-created site audit. The "Audit Error Report" is available in CSV file format on the notification window to open and/or print.

Initiate Audit Error



One or more tags currently exist on another audit in the state of **MISSING** or **MISPLACED**. You must reconcile these tags before creating a new audit.



Note that some tags might be located on transfers and will need to be received first.

 [Download Audit Error Report CSV](#)

OK

Save Search Preferences – Save Preference (Admin only)

Asset Management gives users the ability to save preferences to initiate site audits faster.

1. Click on Initiate Site Audit, located under Admin Tools Quick Links menu.
2. Enter respective site audit information. Red fields are required information.

Warning: Do not click on  Go.

3. Click on  **Save Preference**, located on the left side of the "Initiate Site Audit" window, to create criteria for "District-Initiated Site Audits."
4. The "Save Preference As" window opens. Enter the preference name in the **Preference Name** field.

5. Click on  **Save**. The preference appears at the top of the "Saved Preference" list, located below the three "Save Preference" actions.
6. Click on  **Close** to close the "Initiate Site Audit" window.

Using the "Save Preference" feature, when a user adjusts/edits/adds data sets selected for the "Saved Preference" in the modal window and clicks **Save Preference** again, the new criteria are updated and saved within the search. This will update the "Last Modified Date" and the "Saved Preference Name" displays at the top of the list, below the three "Save Preference" actions.

Save Search Preferences – Save Preference As (Admin only)

Asset Management gives users the ability to save preferences to initiate site audits faster. Using the "Save Preference As" feature saves a copy of the current "Save Preference" with the same validations but with adjusted preferences, and requires a unique name.

1. Click on **Initiate Site Audit**, located under Admin Tools Quick Links menu.
2. Select a search preference.
3. Adjust preferences, if needed.

Warning: Do not click on  Go.

4. Click on  **Save Preference As**, located on the left side of the "Initiate Site Audit" window, to save a copy of the current "Save Preference" with same validations but with adjusted preferences. This requires a unique name.
5. The "Save Preference As" window opens. Enter the preference name in the **Preference Name** field.
6. Click on  **Save**. The preference appears at the top of the "Saved Preference" list, located below the three "Save Preference" actions.
7. Click on  **Close** to close the "Initiate Site Audit" window.

Save Search Preferences – Saved Preferences (Admin only)

The Saved Preferences feature shows the list of Saved Preference previously created.

Saved Preferences



Preference Name	Created By	Last Modified Date	Actions
Technology Audit	District Admin	02/15/2023 14:12:23 PM	

Page size: 10
 1 items in 1 pages

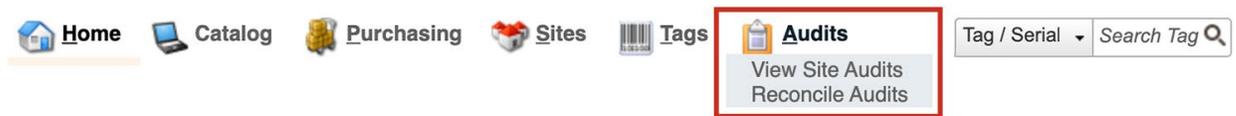
1. Click on **Initiate Site Audit**, located under "Admin Tools Quick Links" menu.
2. Click on **Saved Preferences**. The "Saved Preferences" window opens and displays a list of previously created "Saved Preferences."
3. Click on a saved preference to view the saved preference criteria and click **GO** to proceed with the audit.
4. Click on **Delete**, located under the "Actions" column, to delete the saved preference. After clicking on **Delete**, a message displays: "Are you sure you want to delete this saved preference?"
5. Click on **OK**. The window refreshes and the preference is removed from the grid.
6. Click on **Close** to close the "Saved Preferences" window.
7. Click on **Close** to close the "Initiate Site Audit" window.

Complete Scan Site Audit

The site can edit a room audit and all the respective tags within the room audit while it is in the status of New or In Progress. Audits must be in the status of Scan Complete before reconciling tag audit states. This prevents sites from editing the audit details after the district established deadline has passed.

Note: Only district created audits are displayed within the View Site Audits grid.

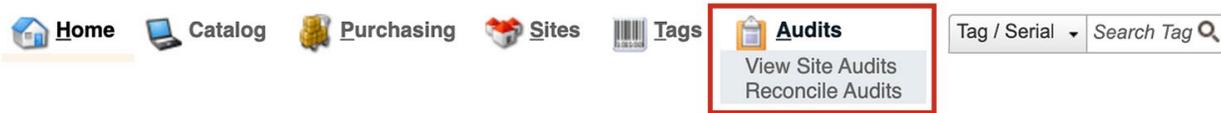
1. On the top navigation bar, click on  **Audits**. The Audits menu displays.
2. Click on **View Site Audits**.



3. Search for the respective administrative created site audit using the filters.
4. On the respective site audit's row under the Actions column, click on  **Complete Scan of All Audits** to open the Complete Scan Audits Confirmation window.
5. Click **OK** to complete scan of all audits for this selection.

Approving a Site Audit

Audits must be in the status of Approved before reconciling tag audit states. The site has the ability to edit a room audit and all of the respective tags within the room audit while it is in the status of New or In Progress. Finalizing the audit prevents sites from editing the audit details after the district established deadline has passed.



1. In the top navigation bar, click **View Site Audits** in the **Audits** menu.
2. Search for the desired district created site audit using the filters.
3. Click on  **Finalize Audits**, located on the respective site audit's row under the **Actions** column.
4. The **Finalize Audits Confirmation** window opens. If you wish to Finalize Audits for the respective site audit, click **OK**.

Pro Tip:

Only approve audit after all rooms, staff, or student audits are complete and site edits have been made.

Running Audit Reports

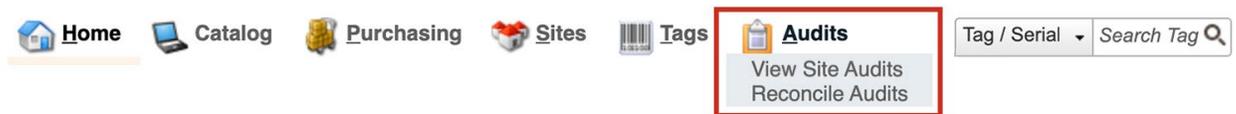
The **Audits** page provides reports to be viewed/printed that compile information from multiple sites.

Audit Detail Report

This report provides a listing of the tags and their displayed audit state from room audits, based on the filters applied to the "Reconcile Audits" grid.

The report includes, in CSV format, "Site ID," "Site Name," "Tag," "Asset Type," "Parent Tag," "Serial Number," "Audit State," "Audit Scan Date," "Audit Scan By," "Audit Location," "Expected Location," "Location Type," "Grade," "Audit Date," "Audit By," "Audit Status," "Action Taken," "Audit Notes," "Product Number," "Product Name," "Model," "Manufacturer," "Product Type," "Tag Status," "Tag Notes," "Order Number," "Funding Source," "Purchase Price," "Purchase Price," and "Facility ID."

1. Click on  **Audits**, located in the top navigation bar. The "Audits" menu displays.
2. Click on **Reconcile Audits**.



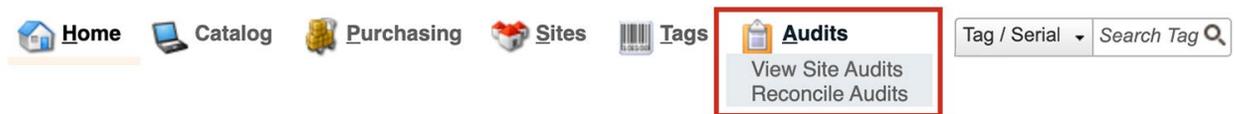
3.  Filter for the respective audited tags using the "Reconcile Audits" filters. At least one filter must be applied.
4. Click  **Apply Filter(s)**. The respective tags are displayed in the "Reconcile Audits" grid.
5. Click on **Please Select Audit Report** drop-down menu, located above the "Reconcile Audit" blue grid header.
6. Select **Audit Detail Report** under the "--- Excel ---" menu subcategory. The "Audit Detail Report Settings" window opens.
7. Select **Arrange by Audit Information**, if desired, to show the "Audit Status," "Audit State," "Action Taken," and "Status" columns at the beginning of the spreadsheet.
8. Click  **GO**.

9. If prompted "Do you want to open or save "AuditDetailReport.csv," click on **Open**.
The "Audit Detail Report" opens in Microsoft Excel.

Site Audit Detail Report

This report includes, in CSV format, "Audit Status," "Audit State," "Action Taken," "Inventory Status," "Site ID," "Site Name," "Region," "Department," "Tag," "Asset Type," "Parent Tag," "Serial Number," "Audit Scan Date," "Audit Scan By," "Audit Location," "Expected Location," "Location Type," "Grade," "Audit Date," "Audit By," "Audit Notes," "Product Number," "Product Name," "Model," "Manufacturer," "Product Type," "Tag Notes," "Order Number," "Funding Source," "Purchase Price," and "Facility ID."

1. Click on  **Audits**, located in the top navigation bar. The "Audits" menu displays.
2. Click on **View Site Audits**.



3. Locate the row for the respective administrative-created audit.
4. Click on  **Audit Detail Report**, located under the "Actions" column. The "Audit Detail Report Settings" window opens.
5. Select **Arrange by Audit Information** to show the "Audit Status," "Audit State," "Action Taken," and "Status" columns at the beginning of the spreadsheet.
6. Click  **GO**. The "Audit Detail Report" opens in Microsoft Excel.

Room Audit Summary Report

This report provides, in PDF format, a listing of room audits' tags and their last audit state, based on the filters applied to the "Rooms" grid. It includes "Room Number," "Room Name," "Room Type," "Status," "Created By," "Created Date," "Last Modified By," "Last Modified Date," "Initiated By," "Approved By," "Approved Date," "Scan Completed By," "Scan Completed On," "Audit Inventory," "Verified," "Found," "Missing," and "Misplaced."

1. Click on  **Audits**, located in the top navigation bar. The "Audits" menu displays.

2. Click on **View Site Audits**.



3. Search for the respective administrative-created site audit.
4. Click on  **District Audit Details**, located under the "Actions" column. The "District Audit Details" window opens.
5. Search for the respective room audit.
6. Click on  **Room Audit Summary Report**, located under the "Actions" column. The "Room Audit Summary Report" window opens.
7. Click on  **Close** to close the "Room Audit Summary Report" window.
8. Click on  **Close** to close the "District Audit Details" window.

Room Audit Detail Report

This report provides, in PDF format, a listing of room audits' tags and their last audit state, based on the filters applied to the "Rooms" grid and by report filters ("Audit State" and/or "Audit Status"). It includes "Site ID," "Site Name," "Tag," "Serial Number," "Audit State," "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."

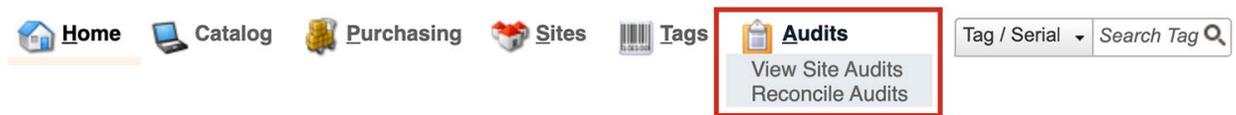
1. Navigate to the desired "Site" using the **Switch to Site** dropdown above the "Quick Links."
2. Click on  **Rooms**, located in the top navigation bar. The "Audits" menu displays.
3. Click on the **Please Report Room Report** drop-down menu, located above the "Rooms" blue grid header.
4. Select **Room Audit Detail Report** under the "--- Excel ---" menu subcategory. The "Filter Report" window opens.

5. Select the respective audit filters from the **Audit State** and **Audit Status** drop-down menus.
6. Click on  **GO**.
7. If prompted "Do you want to open or save RoomAuditDetailReport.csv," click on **Open**. The "Room Audit Detail Report" opens within Microsoft Excel.

Compliance Report

This report provides, in PDF format, an outline for a single approved/closed audit on the View Site Audits grid. The report includes Audit Name, Inventory, Verified, Missing, Misplaced, Created Date, Approved Date, and Completed Date. When compliance information is added, the report also includes Compliance Status, Police Report Attached, District Notes, and Updates.

1. Click on  **Audits**, located in the top navigation bar. The "Audits" menu displays.
2. Click on **View Site Audits**.



3. Click on the  **Compliance Report**, located under the "Actions" column on the blue grid header. The "Compliance Report" window opens.
4. Click  **Record Compliance** to add compliance information, located at the bottom of the report. The "Record Compliance" window opens.
5. Select the **Compliance Status** of the audit.
6. Select the "Police Report Attached" information for the audit:
 - **Yes** – The "Site" attached a police report for each item with a "Lost" status and is compliant
 - **No** – The "Site" did not attach a police report for each item with a "Lost" status and is not compliant
 - **Not Required** – A police report is not required

- **Not Set** – The default setting, meaning nothing has been indicated
- (Optional) Enter notes in the "Notes" field.
 - Click on  **Save**. The Compliance Report updates with the revision.

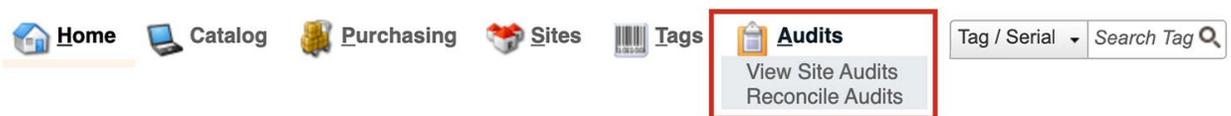
Note: At the bottom of the "Compliance Report" is an "E-Mail Report" action. Clicking on this action allows the user to e-mail a copy of the report to specified users:

- Audit Creator – The creator of the site audit
- Audit Approver – The approver of the site audit
- Primary Site Contact – The primary site contact where the audit is located
- Additional E-Mail Addresses – Any additional users

Full Compliance Report

This report provides, in PDF format, an outline for each approved/closed audit on the View Site Audits grid. The report includes Audit Name, Site Name, Inventory, Verified, Missing, Misplaced, Created Date, Approved Date, and Completed Date.

- Click on  **Audits**, located in the top navigation bar. The "Audits" menu displays.
- Click on **View Site Audits**.

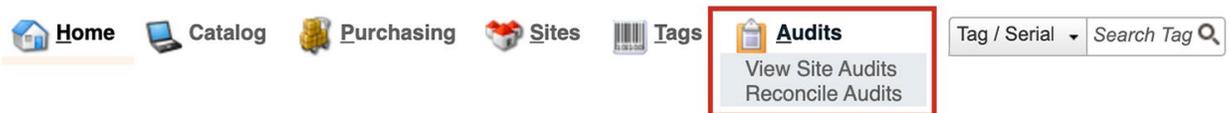


- Click on the **Please Select Audit Report** drop-down menu, located above the "Audits" blue grid header.
- Select **Full Compliance Report** under the "--- PDF ---" menu subcategory. The "Full Compliance Report" window opens.
- Select **Arrange by Audit Information** to show the "Audit Status," "Audit State," "Action Taken," and "Status" columns at the beginning of the spreadsheet.
- Click on  **Close** to close the "Full Compliance Report" window.

Audit Listing Report

This report, in CSV format, provides a list of all the district-initiated audits across all sites based on the filters applied to "View Site Audits." The report includes "Audit Name," "Site," "Created Date," "Last Modified Date," "New," "In Progress," "Scan Complete," "Closed," "Progress," "Police Report," "Inventory," "Verified," "Misplaced," "Missing," "Compliance Status," and "Recent Notes on Compliance Report."

1. Click on  **Audits**, located in the top navigation bar. The "Audits" menu displays.
2. Click on **View Site Audits**.

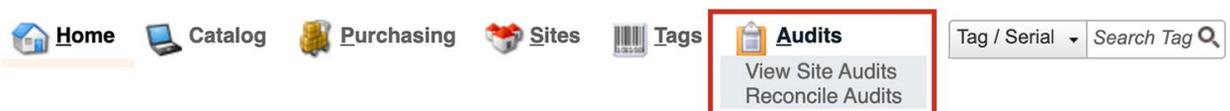


3. Click on the **Please Select Audit Report** drop-down menu, located above the "Audits" blue grid header.
4. Select **Audit Listing** under the "--- Excel ---" menu subcategory.
5. If prompted "Do you want to open or save Audit_Listing.csv," click on **Open**. The "Audit Listing" report opens within Microsoft Excel.

District Audit Listing Report

This report, in CSV format, provides a breakdown of the results of an entire district-initiated audit, based on the filters applied to the "District Audit Details." The report includes "Location," "Location ID," "Grade," "Status," "Modified Date," "Inventory," "Verified," "Found," "Missing," "Misplaced," "Audit Due Date," "Approved By," "Approved Date," "Assigned To," "Scan Completed By," "Scan Completed Date," "Total Inventory," "Total Verified," "Total Found," "Total Missing," and "Total Misplaced."

1. Click on  **Audits**, located in the top navigation bar. The "Audits" menu displays.
2. Click on **View Site Audits**.



3. Locate the respective audit.
4. Click on  **District Audit Details** under the "Actions" column. The "District Audit Details" window opens.
5. Click on the **Please Select Audit Report** drop-down menu, located above the blue grid header.
6. Select **District Audit Listing**.
7. If prompted "Do you want to open or save <Audit Name>_Listing.csv," click on **Open**. The "District Audit Listing" report opens within Microsoft Excel.

Note: For customers with the "Departments" feature installed and enabled, "Department" will be included on the "Audit Detail Report," "Site Audit Detail Report," and "Room Audit Detail Report."

Complete District Requested Audit

The Audits page provides the site level the ability to open, conduct, and view the progress of each audit created by the district. *Before an audit can be reconciled, the site must indicate that it has completed each phase of the audit.

Finalize a Room Audit

A room audit marked as "Scan Complete" indicates all items within the room have been entered / scanned. Finalization of each room audit is a verification by the auditor that the room has been audited. (Even empty rooms should be finalized.)

The  Edit feature for a "Scan Complete" room audit indicates it is not active.

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.

District Initiated Audits for Learning ISD

Filters

Audit Name:

Site:

Created Date:

Audit Due Date:

Last Modified Date:

Progress:

Compliance:

Police Report Required:

Please Select Audit Report...

Audit Name	Created Date	Audit Due Date	Last Modified Date	New	In Progress	Scan Complete	Closed	Progress ?	Compliance ?	Actions
Winter 2023 - Staff Grayson Elementary	01/30/2023		01/30/2023	0	0	2	19	50% Reconciled		
Jackson Staff - Winter 2023	01/30/2023		01/30/2023	7	2	11	0	55% Scanned		
Ridgemont MS - Winter 2023 Student	01/30/2023		01/30/2023	7	1	52	0	87% Scanned		
Grayson Front Office - Feb 2023	02/01/2023		02/01/2023	2	1	7	0	70% Scanned		

- Click  **District Audit Details**, located under the Actions column on the respective audit's row.

Audit Name	Created Date	Last Modified Date	Scan Complete	Closed	Progress ?	Actions
Grayson Front Office - Feb 2023	01/30/2023	01/30/2023	2	19	50% Reconciled <div style="width: 50%;"><div style="background-color: green; height: 10px;"></div></div>	   

This selection causes the District Audit Details window to open.

- Search for the respective room audit and click  **Edit**, located on the respective row.

District Audit Details ✕

Audit Details

Audit Name: Grayson Front Office - Feb 2023	Product Types: All	Ignore Tags Modified Date:
Audit For: Room, Staff	Room Types: 1 Selected ▼	New: 2
Created Date: 02/01/2023	Staff Types: 1 Selected ▼	In Progress: 1
Last Modified Date: 02/01/2023	Grades: All	Scan Complete: 7

✔ Approve Audit ↺ Reopen All Please Select Audit Report... 

Location	Status ?	Modified Date	Inventory	Verified	Found	Missing	Misplaced	Actions
<input type="text" value=""/>	All items checked ▼							
 Room: 800-Scrt	Scan Complete	02/01/2023	4	4	0	0	0	  
 Room: 801-NRS	In Progress	02/01/2023	3	2	0	1	0	  
 Room: 802-Prn	Scan Complete	02/01/2023	3	3	0	0	0	  
 Room: 803-Cnslr	Scan Complete	02/01/2023	3	3	0	0	0	  

This selection causes the Room Audit window to open.

- Click  **Complete Scan**, located above the blue grid header. The Room Audit window closes, and the District Audit Details grid updates the room audit's status to "Scan Complete."

Room Audit

✔

Room: 801-NRS
Nurse

Initialize Room Inventory

Product	Type	Price	Inventory	Verified	Found	Missing	Misplaced	Actions
▶ Cisco Ooma 2602	IP Phone	60.00	1	1	0	0	0	
▶ Mac Mini	Desktop	650.00	1	1	0	0	0	
▶ Brother MFC-L2707DW	Printer	200.00	1	0	0	1	0	
Audit Totals:			3	2	0	1	0	

⏪ ⏩ 1 ⏪ ⏩

Page size: 10

3 items in 1 pages

Reopen a Room Audit

If a room audit has been marked as "Scan Complete," the room audit's Edit feature is not active. To re-activate the room audit's Edit feature, an administrative or site administrator can reopen the room audit's status of Scan Complete. This edits the room audit's status to "In Progress." (The exception to this is if the site audit has been marked as "Approved.")

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



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.

District Initiated Audits for Learning ISD

Filters

Audit Name: Created Date: Progress:

Site: Audit Due Date: Compliance:

Last Modified Date: Police Report Required:

Audit Name	Created Date	Audit Due Date	Last Modified Date	New	In Progress	Scan Complete	Closed	Progress ?	Compliance ?	Actions
Winter 2023 - Staff Grayson Elementary	01/30/2023		01/30/2023	0	0	2	19	50% Reconciled		<input type="button" value="🔍"/> <input type="button" value="🔒"/> <input type="button" value="🔄"/> <input type="button" value="📄"/> <input type="button" value="🗑️"/>
Jackson Staff - Winter 2023	01/30/2023		01/30/2023	7	2	11	0	55% Scanned		<input type="button" value="🔍"/> <input type="button" value="🔒"/> <input type="button" value="🔄"/> <input type="button" value="📄"/> <input type="button" value="🗑️"/>
Ridgemont MS - Winter 2023 Student	01/30/2023		01/30/2023	7	1	52	0	87% Scanned		<input type="button" value="🔍"/> <input type="button" value="🔒"/> <input type="button" value="🔄"/> <input type="button" value="📄"/> <input type="button" value="🗑️"/>
Grayson Front Office - Feb 2023	02/01/2023		02/01/2023	2	1	7	0	70% Scanned		<input type="button" value="🔍"/> <input type="button" value="🔒"/> <input type="button" value="🔄"/> <input type="button" value="📄"/> <input type="button" value="🗑️"/>

- Click  **District Audit Details**, located under the Actions column on the respective audit's row.

Audit Name	Created Date	Last Modified Date	Scan Complete	Closed	Progress ?	Actions
Grayson Front Office - Feb 2023	01/30/2023	01/30/2023	2	19	50% Reconciled	<input type="button" value="🔍"/> <input type="button" value="🔒"/> <input type="button" value="🔄"/> <input type="button" value="📄"/> <input type="button" value="🗑️"/>

This selection causes the District Audit Details window to open.

District Audit Details ✕

Audit Details

Audit Name: Grayson Front Office - Feb 2023	Product Types: All	Ignore Tags Modified Date:
Audit For: Room, Staff	Room Types: 1 Selected ▾	New: 2
Created Date: 02/01/2023	Staff Types: 1 Selected ▾	In Progress: 1
Last Modified Date: 02/01/2023	Grades: All	Scan Complete: 7

Location	Status ?	Modified Date	Inventory	Verified	Found	Missing	Misplaced	Actions
<input type="text" value=""/> <input type="button" value="🔍"/>	<input type="text" value="All items checked"/> <input type="button" value="⌵"/>							
Room: 800-Scrty	Scan Complete	02/01/2023	4	4	0	0	0	<input type="button" value="🔍"/> <input type="button" value="🔒"/> <input type="button" value="🔄"/> <input type="button" value="📄"/> <input type="button" value="🗑️"/>
Room: 801-NRS	In Progress	02/01/2023	3	2	0	1	0	<input type="button" value="🔍"/> <input type="button" value="🔒"/> <input type="button" value="🔄"/> <input type="button" value="📄"/> <input type="button" value="🗑️"/>
Room: 802-Prn	Scan Complete	02/01/2023	3	3	0	0	0	<input type="button" value="🔍"/> <input type="button" value="🔒"/> <input type="button" value="🔄"/> <input type="button" value="📄"/> <input type="button" value="🗑️"/>
Room: 803-Cnslr	Scan Complete	02/01/2023	3	3	0	0	0	<input type="button" value="🔍"/> <input type="button" value="🔒"/> <input type="button" value="🔄"/> <input type="button" value="📄"/> <input type="button" value="🗑️"/>

- Search for the respective room audit in the status of "Scan Complete."
- Click  **Reopen**, located on the respective row. The Reopen window opens and displays the message, "You are about to reopen Room XXX for scanning. This will set the status back to In Progress."

- Click **Confirm**. The Reopen window closes and the District Audit Details grid updates the room audit's status to In Progress.

You can alternately click  **Reopen All**, located above the blue grid header. The Reopen All window opens and displays the message "You are about to reopen all audits that are part of XXX. This will set the status of all locations back to "In Progress."

Approve a Site Audit

Only site administrators can approve an administrative-created site. This approval indicates all room audits have been conducted, and the site is ready for the district level to reconcile the results. The process also changes all room audits to the status of "Scan Complete," regardless of their current status.

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



This selection opens the District Initiated Audits page.

- 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.

District Initiated Audits for Learning ISD

Filters

Audit Name:

Site:

Created Date:

Audit Due Date:

Last Modified Date:

Progress:

Compliance:

Police Report Required:

Please Select Audit Report...

Audit Name	Created Date	Audit Due Date	Last Modified Date	New	In Progress	Scan Complete	Closed	Progress ?	Compliance ?	Actions
Winter 2023 - Staff Grayson Elementary	01/30/2023		01/30/2023	0	0	2	19	50% Reconciled		
Jackson Staff - Winter 2023	01/30/2023		01/30/2023	7	2	11	0	55% Scanned		
Ridgemont MS - Winter 2023 Student	01/30/2023		01/30/2023	7	1	52	0	87% Scanned		
Grayson Front Office - Feb 2023	02/01/2023		02/01/2023	2	1	7	0	70% Scanned		

- Click  **District Audit Details**, located under the Actions column on the respective audit's row.

 Add Record  Edit Columns  E-Mail Compliance Report Please Select Audit Report... 						
Audit Name	Created Date	Last Modified Date	Scan Complete	Closed	Progress ?	Actions
Grayson Front Office - Feb 2023	01/30/2023	01/30/2023	2	19	50% Reconciled <div style="width: 50%;"><div style="background-color: green; height: 10px;"></div></div>	    

This selection causes the District Audit Details window to open.

District Audit Details ✕

Audit Details

Audit Name: Grayson Front Office - Feb 2023	Product Types: All	Ignore Tags Modified Date:
Audit For: Room, Staff	Room Types: 1 Selected ▼	New: 2
Created Date: 02/01/2023	Staff Types: 1 Selected ▼	In Progress: 1
Last Modified Date: 02/01/2023	Grades: All	Scan Complete: 7

 Approve Audit
  Reopen All
 Please Select Audit Report...   Refresh

Location	Status ?	Modified Date	Inventory	Verified	Found	Missing	Misplaced	Actions
<input type="text" value=""/>	All items checked ▼							
 Room: 800-Scrty	Scan Complete	02/01/2023	4	4	0	0	0	  
 Room: 801-NRS	In Progress	02/01/2023	3	2	0	1	0	  
 Room: 802-Prn	Scan Complete	02/01/2023	3	3	0	0	0	  
 Room: 803-Cnslr	Scan Complete	02/01/2023	3	3	0	0	0	  

- Click Approve **Audit**, located above the blue grid header. The Approve Audit window opens and displays the message, "You are about to approve all audits that are part of XXX. This will set the status of all audits back to Scan Complete and will allow assets to be reconciled by the district."
- Click **Confirm**. The Approve Audit window closes, and the District Audit Details grid updates the respective room audit's statuses to Closed/Scan Complete.

Complete Scan (Move to Reconcile)

For an audit to move to the Reconcile phase, all Rooms, Staff, or Student location on the audit must be in a status of "Scan Complete."

How it Works: Administrative admins can use the Complete Scan (Move to Reconcile) action from Administrative View to verify that scanning is complete for the audit. This

action changes all locations in the status "New" or "In Progress" to "Scan Complete" and changes all locations with no inventory or just found/verified tags to the status of "Closed."

Once the action is confirmed, the user is taken directly to the Reconcile grid to reconcile inventory.

To perform this action, use the Switch to Site dropdown menu to switch to Administrative View.

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.

District Initiated Audits for Learning ISD

Filters

Audit Name:

Site:

Created Date: Equal To

Audit Due Date: Equal To

Last Modified Date: Equal To

Progress: 2 items checked

Compliance: Please select:

Police Report Required: Please select:

 Add Record  Edit Columns  E-Mail Compliance Report

Audit Name	Created Date	Audit Due Date	Last Modified Date	New	In Progress	Scan Complete	Closed	Progress ?	Compliance ?	Actions
Winter 2023 - Staff Grayson Elementary	01/30/2023		01/30/2023	0	0	2	19	50% Reconciled		    
Jackson Staff - Winter 2023	01/30/2023		01/30/2023	7	2	11	0	55% Scanned		    
Ridgemont MS - Winter 2023 Student	01/30/2023		01/30/2023	7	1	52	0	87% Scanned		    
Grayson Front Office - Feb 2023	02/01/2023		02/01/2023	2	1	7	0	70% Scanned		    

3. Click  **Complete Scan (Move to Reconcile)**, located in the Actions column for the respective audit. This selection causes the Complete Scan (Move to Reconcile) window to open.
4. Click **Confirm**. The Complete Scan (Move to Reconcile) window closes.

When the administrative admin sets administrative-initiated audits approval to District Only, the Complete Scan (Move to Reconcile) and Reopen Audit actions are hidden from site administrators and site users in the District Audit Details window.

Audit Reconciliation

When conducting official audits, the district level will initiate and reconcile the audit, whereas the site level will conduct the audit (by scanning tags). The reconciliation process begins once a site audit has been "Finalized" (all scanning is complete and the site has located as many assets as possible). No action is taken against tags in the state of "Found" or "Verified."

Reconciliation Overview

Reconciliation of an audit will be faster and easier if the planning stage of the audit addresses all actions that will be taken against tags in the state of "Misplaced" or "Missing" once the site audit has been "Finalized." Your tags will be in the following states:

<p>Misplaced</p> <ul style="list-style-type: none">• Tags located on unexpected sites• Tags located in a different room than expected• Tags issued to students• Tags issued to staff	<p>Missing</p> <ul style="list-style-type: none">• Tags not scanned during the audit
---	--

The "Reconcile Audits" grid allows the filtering of tags in different locations and different states to allow you to view assets in a way that makes reconciliation easier. For example, if you know you will be collecting all assets scanned in a different SITE than expected to the site they were scanned, you can filter based on the criteria and use the BULK reconcile wizard to collect them in one action. Utilizing filtering to organize tags allows the district-level user to quickly reconcile using both individual and bulk reconciliation.

The administrative level can reconcile tag audit states in "Scan Complete" audits. The "Reconcile Audits" grid defaults to display administrative-created tag audit states. Once all administrative-created tag audit states have been reconciled, the most recent of the administrative- or room- (site) created tag audit states are displayed. The administrative level can quickly reconcile tags in the audit state of "Misplaced" or "Missing."

Review any site-created **N** Audit Notes (located in the Actions column) associated with tags prior to reconciling. These notes are intended to provide the administrative level with additional information regarding the specific tag's audit state.

When an (*) asterisk is located next to a step there will be supplemental information regarding the step within the Notes area below.

The notes entered when reconciling an audited tag are displayed on the "Status History" tab for the respective tag in the "Tag Information" window.

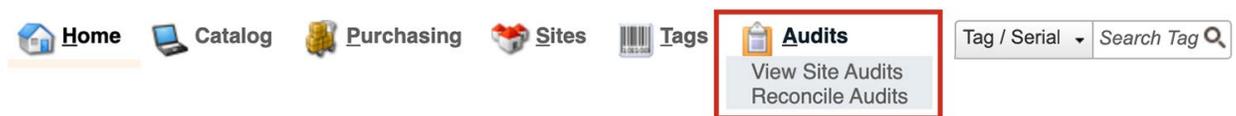
"Asset Type" is one of the search fields available. Asset Types reflect a tag's component association. They are defined as:

- Standalone - A tag not assigned to another tag, nor has tags assigned to it
- Parent - A tag with one or more tags assigned to it
- Component - A tag assigned to another tag

"Tag Status Change Options" are accessed using the "Actions" drop-down menu on the "Reconcile Inventory" grid. Tag Status options are: Missing tags to Ignore, Lost, Stolen, Auctioned, Disposed, Recycled, Returned to Vendor, Sold, Surplus, or Used for Parts.

Reconcile Tag Audit States in Bulk

1. Click on  **Audits**, located in the top navigation bar. The "Audits" menu displays.
2. Click on **Reconcile Audits**.



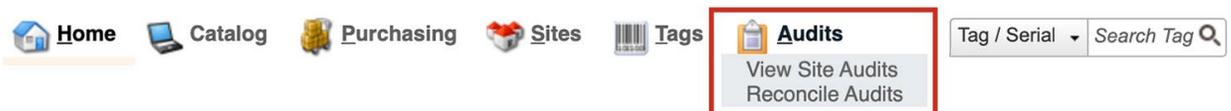
3.  **Filter** for the respective audited tags using **Reconcile Audits Filters**.
4. Click  **Apply Filter(s)**. The respective tags are displayed in the "Reconcile Audits" grid.
5. To select all items on the "Reconcile Audits" grid, select the checkbox in the upper left of the blue grid header. To select individual items, select the checkbox next to the respective item.

6. To reconcile all "Misplaced" or "Missing" tags displayed in the grid, click  **Reconcile**, located above the blue grid header. The **Reconcile Inventory** window opens. *
7. Review the "Reconcile Details" for tags to be marked "Scan Complete" and "Tags Removed from Reconciliation."
8. Select the respective location in the **Location** drop-down menu.
9. Select the respective state in the **Audit State** drop-down menu.
10. Select the respective action from the **Action** drop-down menu.
11. Add reconcile notes in the **Audit Notes** field (optional).
12. Click  **Begin Reconcile Audit**. The **Reconcile Confirm** window opens with a tag quantity to reconcile. A message displays "Proceed with Inventory Update?".
13. Click **OK** to reconcile. A success statement window opens.
14. Click **OK** to close the "Reconcile Complete" window.
15. Click on  **Close** to close the **Reconcile Inventory** window.

Reconcile an Individual Tag's Audit State

The administrative level can individually reconcile tags in the audit state of "Misplaced" or "Missing."

1. Click on  **Audits**, located in the top navigation bar. The "Audits" menu displays.
2. Click on **Reconcile Audits**.



3.  **Filter** for the respective audited tags using the "Reconcile Audits Filters."
4. Click  **Apply Filter(s)**. The respective tags are displayed in the "Reconcile Audits" grid.

5. To reconcile "Missing" tags displayed in the grid, click the **Select Action** drop-down menu located on the tag's row under the "Actions" column and choose the respective action. The "<Status Notes>" window opens.
6. Add reconcile notes in the **Status Notes** field.

Click  **Save Notes**. The "Status Notes" window closes, and the "Reconcile Audits" grid refreshes and displays the new details of the reconciled tag.

Best Practices for Closing Old Audits

If you are attempting to open an audit and are receiving an error that there are audits opened for the sites/tags in question, walk through the following steps to check for issues.

- Check that all sites have completed their asset scanning and have approved all audits.
- Move all audits to the reconciliation state.
- In the reconciliation grid, filter your tag audit state by "Misplaced" or "Missing" to filter tags needing to be reconciled.
- In the reconciliation grid, reconcile missing tags in bulk:
 - Filter tag audit state: "Missing"
 - Select **Go**.
 - Check all assets under second blue grid header.
 - Select **Reconcile** to have the "Reconcile Inventory" window appear.
 - Select **Location**, choose the audit state (for bulk reconcile), and "Desired Action" to be taken upon assets.
 - Select **Go**.

Repeat these steps for each audit state and all locations (room, student, staff).

- Check unreconciled tags to determine if they are in transit status, or on an alternate open audit.
- Locate tags that are not reconciled and not appearing on the Reconcile Audits page.
 - Navigate to **Site > View Site Audit > Open District Audit Details > Filter Status to Scan Complete**.
 - Identify any tags that may have been scanned into a different audit.
 - Identify any tags that are on an incomplete Site-to-Site Transfer and still need to be reconciled. (You will need to research these transfers and either cancel or complete them in order to reconcile them on the audit.)

[Audit Checklist](#)

Use the following printable checklist to complete the phases of your audit.

Preparation

- Strategic planning
- Define scope of work
- Communication plan
- Compile resources
- Rooms: entered and assigned a type
- Check for unreconciled (i.e., site-created room audits, or district-created site audits)
- Complete site-to-site transfers

Creating the Audit

- Make audit name descriptive
- Identify the sites to be audited during the same date/time block
 - Create single audits or batch audits under a single audit name
- Identify product type(s), room type(s), staff type(s), and grades to be targeting in the audit
- Decide if it's necessary to ignore tags modified after a certain date
- Determine if the audit should be restricted

Reconciling Data

Audits should not be approved until *all audits* created at a given time are complete. This allows misplaced tags to be located.

- Review any site-created audit notes

- Reconcile any staff or student audits
- Reconcile missing tags to a status of "Lost" ¹
- Review all misplaced tags ¹
 - Site-to-Site Misplaced: consider if collection is appropriate
 - Room-to-Room Misplaced: collect to their audit location

Reporting

- View audit detail report
 - Tag listing report
-

Notes

¹ Parent and/or component tags cannot be "Bulk" reconciled

Audit Best Practices

The goal of an audit of assets within Asset Management is to verify the established list of assets expected to be in a room or issued to staff/students at a site. Simultaneously, audits are designed to capture asset locations when they have moved from their expected location.

Audit

There are three distinct steps involved in the audit process:

1. **Strategic Planning:** Preparing for the physical audit.

Creating policies for how the audit team will handle different scenarios and standardize their actions across the district will reduce the time spent per site. Areas to focus on prior to the physical audit are:

- **Scope:** Define the Scope of Work, Resources Available, and Determine the Stakeholders.
 - **Communication Plan:** How and when will stakeholders know what is expected during the audit?
 - **Misc:** Consider any other miscellaneous items.
2. **Audit Process:** Performing the audit
 3. **Reconciliation:** Taking action on the audit results and reporting to stakeholders

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).

There are multiple functions that allow a site to perform tasks pertaining to the creation of rooms, the altering of existing room details, and the reporting of inventory within each room.

Rooms Functionality

	Room Number	Description	Room Type	Other	Staff Assigned	Actions
>	101	Assistant Principal	Office		0	
>	102	Counseling Office	Office		0	
>	103	Registration Office	Office		0	
>	104	First grade	Classroom		0	
>	105	First grade	Classroom		0	

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."

Functions	
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.
 Edit	Located on each room's row, this is the process by which a site may edit the respective room's details.
Actions	<p>Allows the site user to affect the room's inventory in the following ways:</p> <ul style="list-style-type: none">  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

102 Counseling Office Office 0

Details Inventory Staff Audits

Room Number: 102 Other: Notes:

Description: Counseling Office

Room Type: Office

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

Product Number	Product Name	Total Inventory	In Use	Available
1001	Acer Aspire One A0532h-2588	3	3	0

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.

Details	
Room to Room Transfer	<p>Expanding the Product line item provides:</p> <ul style="list-style-type: none"> • 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.

The screenshot shows the 'Staff' tab for room 102. At the top, there are tabs for 'Details', 'Inventory', 'Staff', and 'Audits'. Below the tabs, there is a search bar for 'Staff ID' with a dropdown arrow and a refresh icon. Below the search bar, there are buttons for 'Reassign All Staff' and 'Show Inactive', and a 'Refresh' button. The main content is a table with the following columns: Staff ID, First, Middle, Last, Grade, Staff Type, and Actions. The table contains one row of data: Staff ID 1015, First name NILAY, Middle name, Last name ADOCK, Grade 09, Staff Type Teacher, and an Actions column with a red prohibition sign and a person icon. At the bottom of the table, there are navigation buttons (back, forward, page 1), a 'Page size: 10' dropdown, and a status indicator '1 items in 1 pages'.

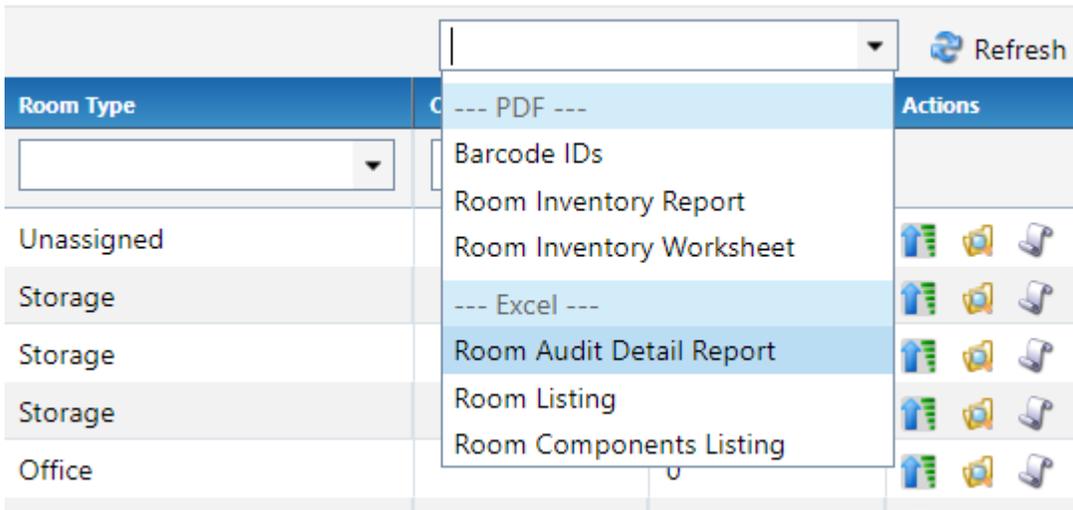
This assignment is tied directly to Staff-Run Audits, Inventory Reports, and the integration with the Help Desk Management System.

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.
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.).

Details	
<p>Actions</p>	<p>Functions allowing the site user to affect the staff's room association.</p> <ul style="list-style-type: none">  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.



The screenshot shows a table with columns for 'Room Type' and 'Actions'. A dropdown menu is open over the table, listing several report options: '--- PDF ---', 'Barcode IDs', 'Room Inventory Report', 'Room Inventory Worksheet', '--- Excel ---', 'Room Audit Detail Report', 'Room Listing', and 'Room Components Listing'. The 'Room Audit Detail Report' option is currently selected. The table rows show room types: 'Unassigned', 'Storage', 'Storage', 'Storage', and 'Office'.

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.
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

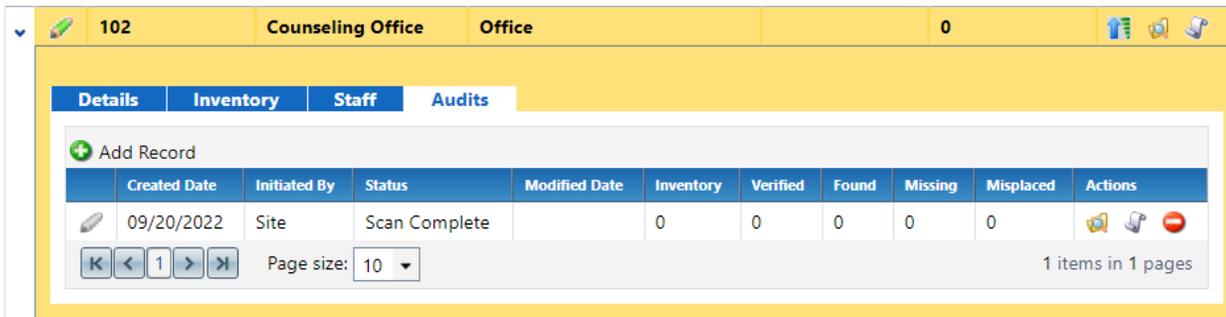
 **Room Inventory Rpt**

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 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



Created Date	Initiated By	Status	Modified Date	Inventory	Verified	Found	Missing	Misplaced	Actions
09/20/2022	Site	Scan Complete		0	0	0	0	0	  

The "Audits" tab displays each audit created for the respective room.

Details	
 Add Record	Add an audit to this room.
 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.)
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.

Details	
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.
Actions	<p>Functions allowing the site user to affect the room's audit.</p> <ul style="list-style-type: none">  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).

Room Types

"Room Types" are general categories used to label different kinds of rooms within a site. Examples of "Room Types" include "Classroom," "Lab," "Storage," and "Office." This is helpful to the administrative level as a filter when searching for or reporting on assets and creating site audits. Once a "Room Type" is added to the "Room Types" table, it is available for the site-level user to apply to a new or existing room.

Add a Room Type

Manage Room Types ✕

+ Add Record 🔄 Refresh	
	Room Type
	Classroom
	Computer Lab
	Cubicle
	Distribution
	Lab
	Library
	Meeting
	Network
	OFF Site
	Office

⏪ ⏩ 1 2 3 > >>
 Page size:
24 items in 3 pages

1. Click on **Room Types** under "Management Quick Links." "Manage Room Types" opens.
2. Click on **Add Record**.
3. Enter the **Room Type** and **Description** in the respective fields. Red fields are required.
4. Click on **Add**.
5. Click on **Close** to close the "Manage Room Types" window.

Running Room 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.

The screenshot shows the 'Rooms' grid with columns for Room Number, Description, and Room Type. A dropdown menu is open, showing options for PDF and Excel reports. The 'Actions' column contains icons for report generation.

Room Number	Description	Room Type	Actions
700-MDF	Server/MDF	Network	[Icons]
W001	Operations Equipment	Storage	[Icons]
W002	Instructional Equip/Materials	Storage	[Icons]
W003	Shipping/Disposal	Storage	[Icons]

Report options in the dropdown menu:

- PDF ---
 - Barcode IDs
 - Room Inventory Report
 - Room Inventory Worksheet
- Excel ---
 - Room Audit Detail Report
 - Room Listing
 - Room Components Listing

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-Staff Import

In Asset Management, staff members are associated with certain rooms. Administrative users can export a current room-staff template that lists all room-staff assignments for that site. The user can then easily add/edit/remove staff room assignments. After edits are made, users can import the new spreadsheet to the site.

Export Room-Staff Assignment Template

1. Click on  **Rooms**, located in the top navigation bar.
2. Click on **Room-Staff Import** under the "Management Quick Links" menu. The "Room-Staff Import" window opens.
3. Click on the **download template** hyperlink to download a template. The downloaded template will reflect the rooms and associated staff at the time of the download. Most browsers will save the file in your downloads folder.

Select template file below ([download template](#))

4. Click on  **Close** to close the "Room-Staff Import" window.
5. Edit the "Room-Staff Import" by adding the **Staff ID** in the correct column next to the room to which that staff is assigned. You can add a second staff member to that room by adding a new line to the template, duplicating the room information and including the new **Staff ID**, as shown below.

A	B	C	D
SiteID	RoomNumber	RoomDescription	StaffID
001	101	English	1015
001	100	English	1004326
001	100	English	1782
001	000-Recv	Receiving Room	

Import Room-Staff Assignment Template

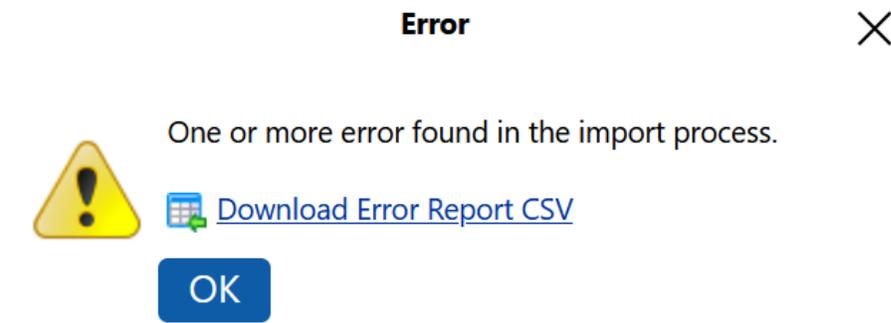
Import a new "Room-Staff" assignment template, incorporating all edits made to staff assignments at the site.

1. Click on  **Rooms**, located in the top navigation bar.
2. Click on **Room-Staff Import** under "Management Quick Links" menu. The "Room-Staff Import" window opens.
3. Click **Browse** to navigate to the respective template.
4. Click **Open** to add the file.
5. Click on  **Begin Import**. The "Import Confirmation" window opens, indicating the quantity of new staff assignments.
6. Click on  **Stop Import** to cancel the import.
7. Click on  **Finish Import** to complete the import.
8. Click on  **Close** to close the "Room-Staff Import" window.

Template Rules

- All staff added or removed from the import template will be reflected in the **Staff** tab for the corresponding room.
- If no staff are currently assigned to rooms in Asset Management, the template will export one row for every unique room at the site.
- If staff are currently assigned to rooms, the template will include a row for every unique staff ID assigned to a room at the site.
- If multiple staff need to be assigned to a single room, duplicate the room number row.
- Staff can be assigned to multiple rooms at the site.
- If the same staff ID is entered for a duplicate room, only the first room-staff assignment will be made in Asset Management.

- Rooms do not require a staff assignment.
- Rooms do not need to be listed in descending order when imported.
- If the staff ID field is left blank in the template, no room-staff assignment will be made in Asset Management.
- If the staff ID field is deleted in the template, the room-staff assignment will be deleted in Asset Management.
- If a room number is added to the template that does not exist at the site in Asset Management, no room will be created, and the upload will fail.
- If a staff ID that does not exist at the site is added to the template, no staff will be created, and the upload will fail.
- If an error occurs with the template upload, the “Error” window will open and provide an opportunity to download the error log for review.



Create and Conduct a Room Audit

A "Room Audit" allows a site to scan all tags in a room and quickly identify missing and misplaced items. "Room" audits can be created by the site or administrative-level users.

When conducting a "Room" audit, items located in the room but not found in the database can be initialized (added to the database by administrators and site users) using "Initialize Room Inventory." If the item's product has not been defined in the "Catalog," it can be defined by administrators during the audit using "Create New Product."

Create a Room Audit

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. The grid expands and displays the **Details**, **Inventory**, **Staff**, and **Audits** tabs.
4. Click on the **Audits** tab.
5. Click on  **Add Record**, located in the **Audits** tab. The "Room Audit" window opens.

Room Audit ✕

Enter Tag... ✔ Room: 119
Math

Initialize Room Inventory

Product	Type	Price	Inventory	Verified	Found	Missing	Misplaced	Actions
▶ TI 73 Calculator	Calculator	110.00	4	0	0	4	0	
▶ Lenovo ThinkCentre M57e	Desktop	650.00	1	0	0	1	0	
▶ Elmo EV-4400AF	Document Camera	2300.00	1	0	0	1	0	
▶ 77" StarBoard FX TRIO	Interactive Whiteboard	1500.00	1	0	0	1	0	
▶ Cicso Ooma 2602	IP Phone	60.00	1	0	0	1	0	
▶ Sharp PG-F212X Projector	LCD Projector	749.00	1	0	0	1	0	
▶ iPod touch 32GB -4th Gen	Tablet	290.00	1	0	0	1	0	
▶ Meraki MR46 AP	Wireless Access Point	1250.00	1	0	0	1	0	
▶ 19" ThinkVision L197	Monitor	156.00	1	0	0	1	0	
Audit Totals:			12	0	0	12	0	

Page size: 9 items in 1 pages

- Review the products listed on the "Room Audit" grid.
 - If any product should be excluded from this room audit, click on **Exclude** under the "Actions" column on the respective product's row.
- To begin conducting the room audit immediately, skip to "Conduct a Room Audit," below.
- To conduct the audit later, click the "X" to close the "Room Audit" window.

Conduct a Room Audit

"Room Audits" in the status of "New" or "In Progress" are eligible to add/edit tags in a room. All respective tags expected to be in the room start in the tag audit state of "Missing." As each expected tag is scanned into the room audit, the tag's audit state moves from "Missing" to "Verified." Any tag scanned into a room audit for which it is not expected to be located is added to the room audit as "Misplaced." The tag then appears in the expected room location as "Found" if that room has an audit in progress.

The "Found" state persists until an administrative audit has been approved or until a site-created room audit has been marked as "Scan Complete."

- 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. The grid expands and displays the **Details**, **Inventory**, **Staff**, and **Audits** tabs.
4. Click on the **Audits** tab. The audits list is opened.

119 Math Classroom 1										
Details Inventory Staff Audits										
Add Record										
	Created Date	Initiated By	Status	Modified Date	Inventory	Verified	Found	Missing	Misplaced	Actions
	02/22/2023	Site	New		12	0	0	12	0	
	03/22/2021	District	Closed	03/22/2021	11	10	0	0	1	

Page size: 10 2 items in 1 pages

5. Search for the respective room audit.
6. Click on **Edit**, located in the same row. The "Room Audit" window opens.
7. Enter/scan each tag number located in the respective room into the **Enter Tag** field.
 - Enter all tags physically located in the respective room. Do this even if the product is not listed in the "Room Audit" window as an issued product for that room. Asset Management identifies each tag as "Missing," "Misplaced," "Found," or "Verified."
8. Click on **Save** to leave the "Room Audit" window.
9. Click **Complete Scan** to end and lock the audit from additional tag entries. This changes the audit status from "In Progress" to "Scan Complete."

Initialize Create New Product During a Room Audit

When "Initializing Inventory" during a "Room Audit," if the product has not been defined in the "Catalog," a district administrator can add it using the "Create New Product" feature from the "Room Audit" window.

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

2. Filter the "Rooms" grid to locate the respective room.
3. Click on  **Initialize Room Inventory**. The "Initialize Room Inventory" window opens.
4. Click  **Add New Product**. The window refreshes and displays the "Create New Product" fields.

Initialize Room Inventory

 [Cancel](#)

Create New Product

Product Number:	<input type="text" value="2000155"/>	Suggested Price:	<input type="text" value="\$0.00"/>
Product Name:	<input type="text"/>	Serial Required:	<input type="checkbox"/>
Manufacturer:	<input type="text"/>	Allow Untagged:	<input type="checkbox"/> ?
Model:	<input type="text"/>	Active:	<input checked="" type="checkbox"/>
Product Type:	<input type="text"/>	Notes: <input type="text"/>	
Area:	<input type="text"/>		
SKU:	<input type="text"/>		
Model End of Life:	<input type="text"/>		
Projected Life:	<input type="text"/>		
Other #1:	<input type="text"/>		
Other #2:	<input type="text"/>		
Other #3:	<input type="text"/>		

5. Enter the product information in the respective fields. The "Product Number" field auto-populates. Red fields are required information.
6. Click on  **Save**. You are returned to the "Initialize Room Inventory" window.
7. Complete the tag information by filling in the required fields.
8. Select the **Funding Source** from the drop-down menu.
9. Select the **Status** from the drop-down menu.
10. Enter/scan the tag number in the **Tag** field.
11. Click  **Save**. The system will verify the tag does not already exist in the database.
12. Enter/scan the serial number in the **Serial** field.

13. Click on  **Save**.

14. Click on  **Done** to close the "Initialize Room Inventory" window.

Room Inventory During a Room Audit

When an asset with a tag is found in a room during a "Room Audit," but the tag does not exist in the system, it can be added directly from the "Room Audit" window by selecting **Initialize Room Inventory**, if the user has permission to add new assets.

Room Audit ✕

Tag not in system



Room: 119
Math


Tag: 5475

Serial: UI89445-875563

Status: In Use

Condition: Select Condition... ▾


Initialize Room Inventory

Product	Type	Price	Inventory	Verified	Found	Missing	Misplaced	Actions
▶ Elmo EV-4400AF	Document Camera	2300.00	1	1	0	0	0	
▶ 77" StarBoard FX TRIO	Interactive Whiteboard	1500.00	1	0	0	1	0	

1. Click on  **Initialize Room Inventory**. The "Initialize Room Inventory" window opens.

Initialize Room Inventory

 [Done](#)

Location Details

Site: Learning Campus

Room: 119

 Add New Product

Product Number:    

Product Name: 19" ThinkVision L197

Funding Source: 

Status: 

Tag:  

Serial:

Scan History for Today:

Product	Tag	Serial	Status	Funding Source	Actions
No records to display.					

  1   Page size: 0 items in 1 pages

Note: Initialized Inventory will be added as 'Verified' on audit

 [Done](#)

2. Enter/scan the product number in the **Product Number** field. If the product does not exist in the "Catalog," see "Create New Product During a Room Audit," above.
3. Select the **Funding Source** from the drop-down menu.
4. Select the **Status** from the drop-down menu.
5. Enter/scan the tag number in the **Tag** field.
6. Click  **Save**. The system will verify the tag does not already exist in the database.
7. Enter/scan the serial number in the **Serial** field.
8. Click on  **Save**.
9. Click on  **Done** to close the "Initialize Room Inventory" window.

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).

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.

102 Counseling Office Office 0

Details Inventory Staff Audits

Staff Assigned To Room

Staff ID:

Reassign All Staff Show Inactive Refresh

Staff ID	First	Middle	Last	Grade	Staff Type	Actions
<input type="text"/>						
1015	NILAY		ADOCK	09	Teacher	

Page size: 10 1 items in 1 pages

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.

Edit a Room Type

Manage Room Types

Add Record Refresh

Room Type
Classroom
Computer Lab
Cubicle
Distribution
Lab
Library
Meeting
Network
OFF Site
Office

Room Type:

Description:

Page size: 10 24 items in 3 pages

1. Click on **Room Types** under "Management Quick Links." "Manage Room Types" opens.
2. Click on  **Edit** in the respective room type's row.
3. Edit the **Room Type** and/or **Description**.
4. Click on  **Update**.
5. Click on  **Close** to close the "Manage Room Types" window.

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.

Initialize Room Inventory

[Done](#)

Location Details

Site: Learning Campus

Room: 118

Product Number:

Product Name:

Funding Source:

Status:

Tag:

Serial:

Scan History for Today:

Product	Tag	Serial	Status	Funding Source	Actions
No records to display.					

Page size:
0 items in 1 pages

[Done](#)

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. If you currently have asset tags that could serve as your Asset Management tag numbers (unique identifiers), you will not need to print Asset Management tags.
- Districts with the "Departments" feature enabled will be asked to assign each tag to a specific department.
- Scanner requirements include using a scanner that is programmed to read symbology 128A. Contact Frontline Education for more information and/or current scanning equipment available to purchase.

Reconcile a Room Audit

Once a "Room Audit" is in the status of "Scan Complete," the site can quickly take action on each tag in the state of "Missing" or "Misplaced" or take no action at all. If a tag is "Missing," the site can change the status of the tag. If a tag is "Misplaced," the tag can be collected to the room. Once all tags have had an action taken regarding their respective audit state, the audit can be closed.

"Site Users" are restricted from this process.

"Site Administrators" can *only* reconcile site created audits in a status of "Scan Complete."

1. Click on  **Rooms**, located in the top navigation bar.
2. Filter to find the respective room where the audit currently resides.
3. Click on the respective row to expand the grid.
4. Click the **Audits** tab.
5. Click on  **Audit Details**, located under the "Actions" column on the row of the respective "Scan Complete" audit. The "Room Audit Details" window opens.

Room: 118 Audit Detail
Assigned To: Timothy Cochran

Status: Scan Complete	Initiated By: Site	Audit Inventory: 15
Created By: Trainer 1 Admin/Admin	Scan Completed By: Trainer 1 Admin/Admin	Verified: 11
Created Date: 02/23/2023	Scan Completed On: 02/23/2023	Found: 0
Last Modified By: Trainer 1 Admin/Admin		Missing: 4
Last Modified Date: 02/23/2023		Misplaced: 0

State	Product	Tag	Asset Type	Actions
>  Missing	Cicso Ooma 2602	00:0C:F1:85:61:09	Standalone	Select Action...
>  Missing	Meraki MR46 AP	T550031	Standalone	Select Action...

6. Use the search fields to identify which tag to take action on, or start at the top of the grid to take action on each "Missing" or "Misplaced" tag.
7. Click on the **Select Action** drop-down menu in the respective tag's row.

- After an action has been taken, the respective tag will be sorted to the bottom of the "Room Audit Details" grid.
 - "Missing" tags - Choose **No Action** and supply notes about why no action is being taken, OR choose to change the tag's status to "Lost"
 - "Misplaced" tags - Choose **No Action** and supply notes about why no action is being taken, OR choose to **Collect** the tag to the current room (the tag will be in the status of "Available").
8. After taking action on desired items, click on  **Wrap Up Audit** to set all remaining tags to "No Action" and supply notes about why no action is being taken for the remaining tags
- This also changes the audit status from "Scan Complete" to "Closed."
9. Click on  **Close** to close the "Room Audit Details" window.

Note:

- The tags in the "Room Audit Details" window are sorted by "Audit State." The grid is sorted first by "Missing," then "Misplaced," then "Found," then "Verified."
- "Asset Type" is one of the search fields available. "Asset Types" reflect a tag's component association. They are defined as:
 - Standalone - A tag not assigned to another tag, nor has tags assigned to it
 - Parent - A tag with one or more tags assigned to it
 - Component - A tag assigned to another tag

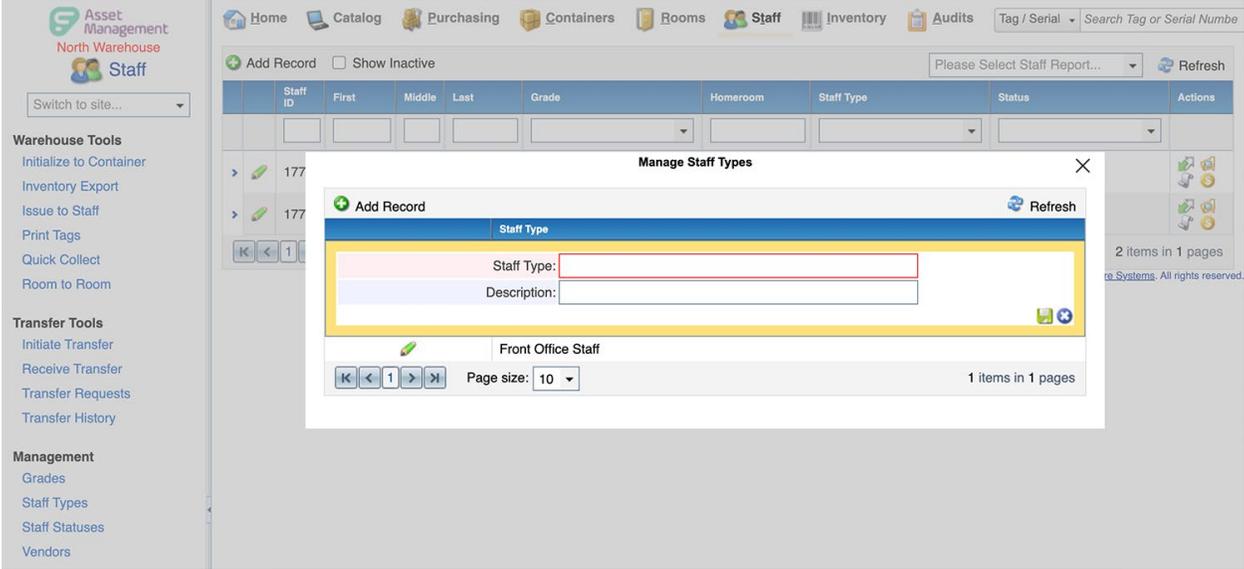
Staff

Staff Types

Staff Types are general categories used to label different kinds of staff members within a site. Staff Types might include Teacher, Technical Staff, Administrative Personnel, and others.

It is possible to manually add staff members. The best practice is to use the ID number produced by your student management system when manually adding. The data import will 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. In the Management Quick Links menu, click **Staff Types**. The Manage Staff Types window opens.
3. Click  **Add Record**.
4. Enter the new staff type's details. Red fields are required.
5. Click  **Add**.
6. Click  **Close** to close the Manage Staff Types window.



The screenshot displays the 'Manage Staff Types' interface. At the top, there is a navigation bar with options like Home, Catalog, Purchasing, Containers, Rooms, Staff, Inventory, and Audits. Below this is a table with columns: Staff ID, First, Middle, Last, Grade, Homeroom, Staff Type, Status, and Actions. A modal window titled 'Add Record' is open, showing a form with 'Staff Type' and 'Description' fields. The 'Staff Type' field is highlighted in red, indicating it is required. Below the form, there is a preview of 'Front Office Staff' and a 'Page size' dropdown set to 10.

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**.
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," "Homerroom," "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

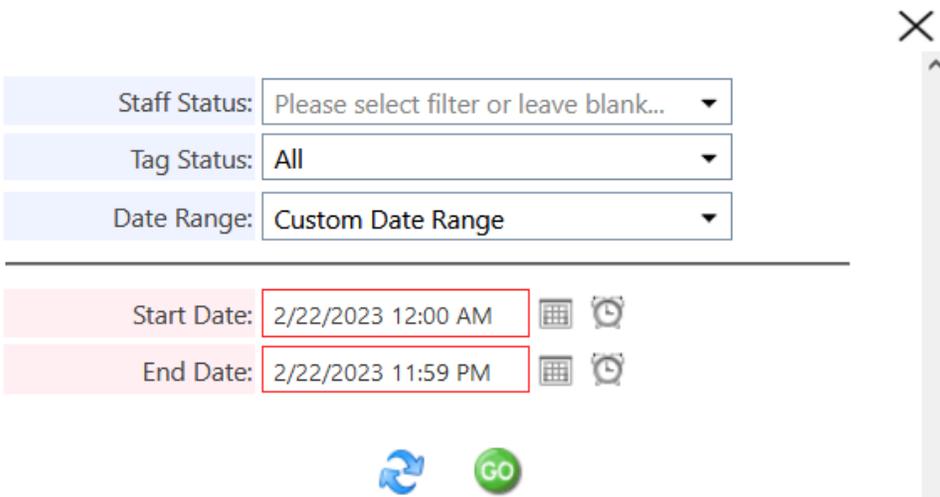
This report, in CSV format, provides charge activity details for respective staff members within a site. This report includes "Staff ID," "Last Name," "First Name," "Middle Name," "Staff Type," "Status," "Grade," "Homerroom," "Product," "Tag," "Charge Type," "Description," "Charge Notes," "Issue Date,"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



The screenshot shows a 'Filter Report' window with a close button (X) in the top right corner. It contains three dropdown menus: 'Staff Status' with the value 'Please select filter or leave blank...', 'Tag Status' with the value 'All', and 'Date Range' with the value 'Custom Date Range'. Below these are two input fields for 'Start Date' and 'End Date', both containing '2/22/2023'. The 'Start Date' field is highlighted with a red border and includes a calendar icon and a clock icon. The 'End Date' field also includes a calendar icon and a clock icon. At the bottom of the window are a blue refresh icon and a green 'GO' button.

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**.

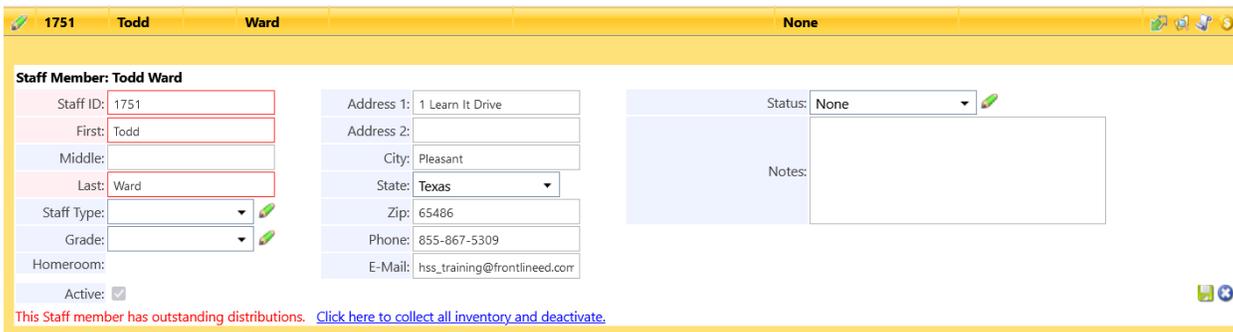
Edit a Staff Record

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.



Staff Member: Todd Ward

Staff ID: 1751
 First: Todd
 Middle:
 Last: Ward
 Staff Type:
 Grade:
 Homeroom:
 Active:

Address 1: 1 Learn It Drive
 Address 2:
 City: Pleasant
 State: Texas
 Zip: 75086
 Phone: 855-867-5309
 E-Mail: hss_training@frontlineed.com

Status: None
 Notes:

This Staff member has outstanding distributions. [Click here to collect all inventory and deactivate.](#)

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

Staff Inventory Collection and Deactivation

 [Done](#)

Collect to:

Return to Room:    

Room Description: **Technology Storage**

Collect to Status:

Status Notes: 

Tag / Serial: 

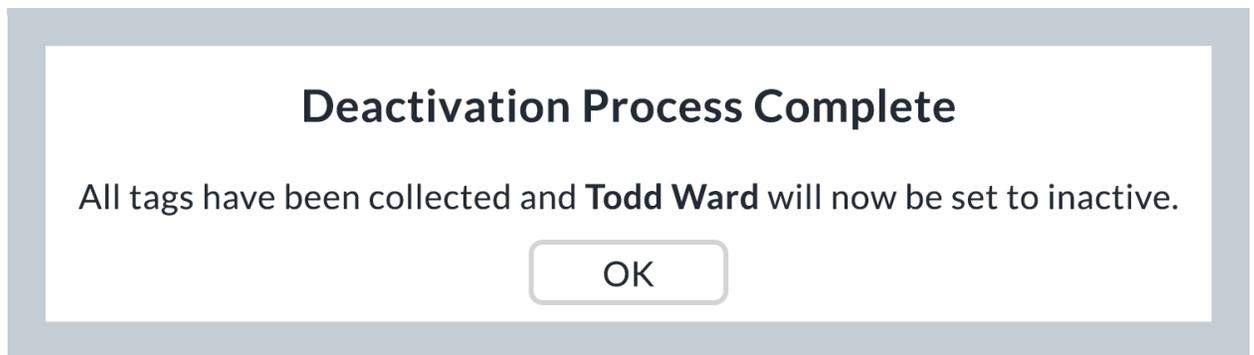
Inventory for Todd Ward

Tag	Serial	Product #	Product	Complete
5517	QX45111	2000057	HP Mini 110-1126NR	

 [Done](#)

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.

Staff Deactivation Process – Collect to a Site

If the staff member is leaving the site but not the district, the asset can be transferred to the new site utilizing the "Collect to a Site" method (see below), if the user wishes to transfer the asset with the staff member.

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. Select **Click here to collect all inventory and deactivate**. The "Staff Inventory Collection and Deactivation" window opens.
6. Select **Site** from the "Collect to" drop-down menu.
 - If the staff member has already been added to the chosen site, an additional option will appear called **Automatically Issue to <STAFF NAME>**.

Staff Inventory Collection and Deactivation



Collect to:

Return to Room:    

Room Description: **Technology Storage**

Collect to Status:

Status Notes: 

Tag / Serial: 

Inventory for Todd Ward

Tag	Serial	Product #	Product	Complete
5517	QX45111	2000057	HP Mini 110-1126NR	



8. Select the site the tag is being collected to from the **Destination Site** drop-down menu.
9. Select the room the tag will be collected to from the **Destination Room** drop-down menu.
10. Select **Automatically Issue to <STAFF NAME>**. Selecting **Automatically Issue to <STAFF NAME>** triggers the following:
 - The inventory automatically transfers to the destination site/room.

- The inventory is automatically issued to the staff member.
- If the option is selected, "Available" will no longer be an option in the "Status" dropdown.
- Accessory collection is not an option during this process – all accessories are moved along with the asset.
- "Status and Inventory History" for the tag number automatically updates with the appropriate data.

11. Select the status from the **Collect to Status** drop-down menu.

12. (Optional) Enter notes in the **Status Notes** field. Click on  **Lock/Unlock** to secure.

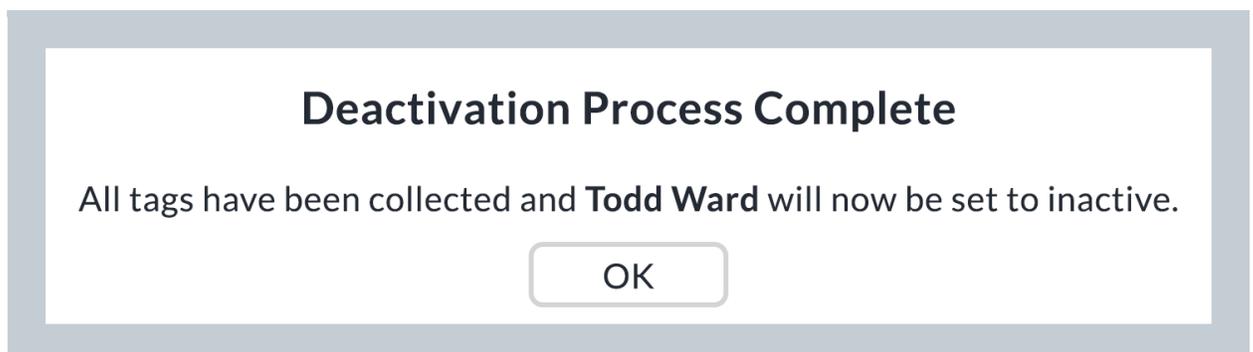
13. Enter/scan the tag number in the **Tag** field.

14. Click on  **Save**.

15. If there are accessories assigned to the tag, they will display. Edit the collected accessory quantity for any missing accessories.

16. To collect the tag and respective accessories, click on  **Collect Accessories**. The "Deactivation Process Complete" window opens.

17. The following message displays: "All tags have been collected and (name of Staff) will now be set to inactive."



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

Note:

- Quick Collect and Transfer Permissions are established by the Administrative Administrator. If the user does not have these permissions, the “Click here to collect all inventory and deactivate” link will not display.

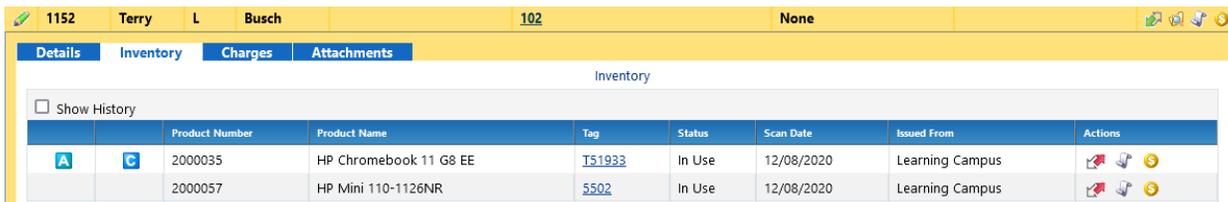
Collect Items from Staff

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.



The screenshot shows the 'Inventory' tab selected. The table below is a representation of the data shown in the screenshot.

		Product Number	Product Name	Tag	Status	Scan Date	Issued From	Actions
		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.
 - The "Collect To" field defaults to "Room."

Quick Collect

 [Done](#)

Collect to:

Return to Room:
ROOM NUMBER REQUIRED

Room Description:

Collect to Status:

Status Notes:

Tag / Serial:

Scan History for Today:

Product	Tag	Source	Destination	Reports	Actions
No records to display.					

Page size: 0 items in 1 pages

 [Done](#)

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

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

Collect from Staff Account to a Transfer

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



Product Number	Product Name	Tag	Status	Scan Date	Issued From	Actions
2000035	HP Chromebook 11 G8 EE	IS1933	In Use	12/08/2020	Learning Campus	  
2000057	HP Mini 110-1126NR	5502	In Use	12/08/2020	Learning Campus	  

- 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.

Quick Collect

 [Done](#)

Collect to:

Pickup Location:

Pickup Room Description:

Add to Transfer:

Destination Site:

Collect to Status:

Status Notes:

Tag / Serial:

Scan History for Today:

Product	Tag	Source	Destination	Reports	Actions
---------	-----	--------	-------------	---------	---------

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.

Issue Inventory

 [Done](#)

Staff ID:    

Staff Name: **Nilay Adock**

Due Date:   

Tag / Serial: 

Current Inventory: Please Select Inventory Report... ▾

	Product Number	Product	Tag	Status	Scan Date	Source
	2000033	Dell Latitude 3301	5434	In Use	02/22/2023	Room: 600
	2000057	HP Mini 110-1126NR	5499	Lost	12/08/2020	Staff: Nilay Adock

    Page size: 2 items in 1 pages

 [Done](#)

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.

Assess a Charge ✕

Individual: Lou A Bond

Charge Type: Broken Keyboard

Suggested Percentages: 100%= \$0.00 75%= \$0.00
50%= \$0.00 25%= \$0.00

Product and Tag:

Show History

		Product Number	Product Name	Tag	Status	Scan Date	Actions
A	C	2000035	HP Chromebook 11 G8 EE	T51931	In Use	06/08/2021	Select
		2000057	HP Mini 110-1126NR	5501	In Use	12/08/2020	Select

Page size: 2 items in 1 pages

Charge Amount: \$20.00

Charge Notes:

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.

Edit a Charge ✕

<p>Individual: Lou A Bond</p> <p>Product Number: 2000035</p> <p>Product Name: HP Chromebook 11 G8 EE</p> <p>Tag: <input style="width: 150px;" type="text" value="T51931"/></p>	<p>Price: \$250.00</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: right;">Suggested Percentages:</td> <td style="text-align: left;">100%= \$250.00</td> <td style="text-align: left;">75%= \$187.50</td> </tr> <tr> <td></td> <td style="text-align: left;">50%= \$125.00</td> <td style="text-align: left;">25%= \$62.50</td> </tr> </table>	Suggested Percentages:	100%= \$250.00	75%= \$187.50		50%= \$125.00	25%= \$62.50
Suggested Percentages:	100%= \$250.00	75%= \$187.50					
	50%= \$125.00	25%= \$62.50					
<p>Charge Type: Broken Keyboard</p> <p>Charge Amount: \$20.00</p> <p>Satisfied: <input type="checkbox"/></p>	<p>Charge Notes: <input style="width: 150px;" type="text" value="Please enter notes here..."/></p> <p>Void: <input type="checkbox"/></p>						



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**.

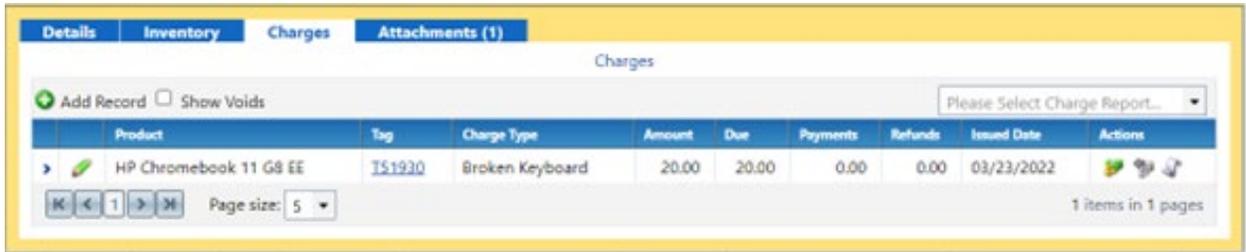
9. Click  **Close** to close the Edit a Charge window.
10. Above the Charges grid for the respective staff member, select **Show Voids** to view the voided charge.

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.



Product	Tag	Charge Type	Amount	Due	Payments	Refunds	Issued Date	Actions
HP Chromebook 11 G8 EE	T51930	Broken Keyboard	20.00	20.00	0.00	0.00	03/23/2022	  

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).

New Payment

Charge Type: Broken Keyboard	Charge Notes: Missing keys
Charge Amount: \$20.00	
Amount Due: \$20.00	
Payment Date: 2/17/2023	Payment Notes: Please enter notes here...
Amount: Enter a dollar amount.	
Satisfied: <input type="checkbox"/>	

Charge History for: Nilay Adock

Payment Date	Amount	Received By	Site Name	Notes
No records to display.				
Page size: 10				0 items in 1 pages

7.

- 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.

- On the top navigation bar, click **Staff**.
- Filter for the respective staff member.
- 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**.

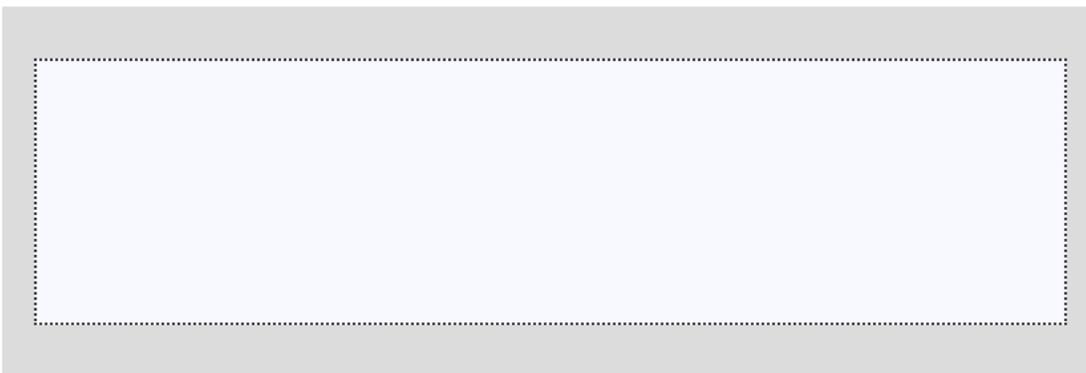
[View/Sign a Collection Receipt from Staff](#)

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**.

Sign Receipt



 Decline Signature

 Clear Signature

 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 Receipt](#)

"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.

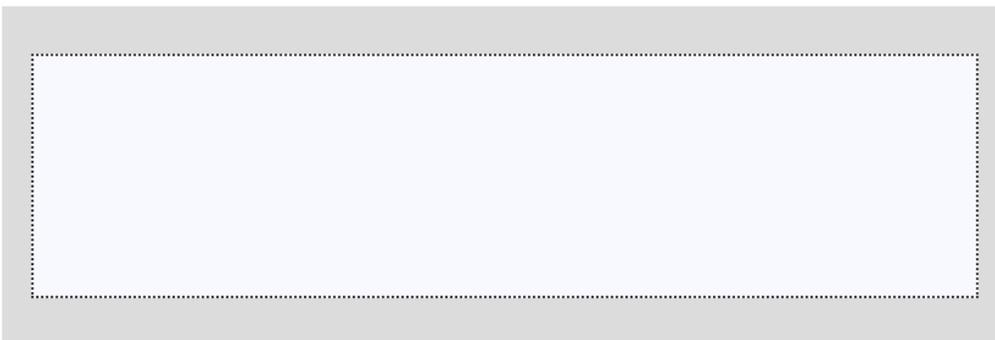
Issuing a Distribution Receipt to Staff

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.)

Sign Receipt



 Decline Signature

 Clear Signature

 Accept 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 Receipt

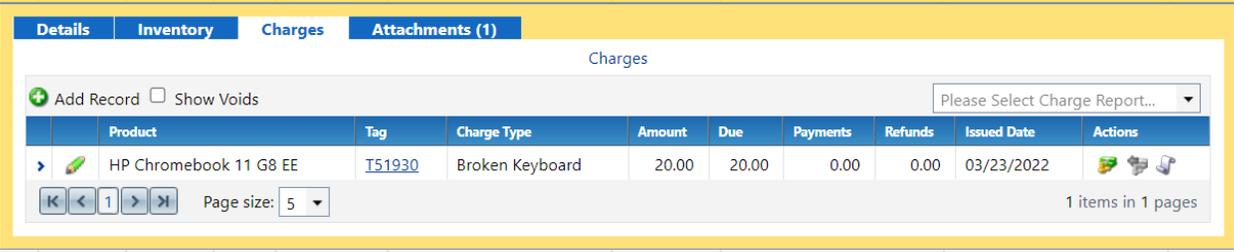
"Charges" are assessed when an item has been damaged and/or as a prerequisite before an item is issued. "Charge Types" are created by the administrator. All charges require the selection of an established "Charge Type." The administrator also determines whether users can adjust the dollar amount required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



Charges										
Product	Tag	Charge Type	Amount	Due	Payments	Refunds	Issued Date	Actions		
HP Chromebook 11 G8 EE	T51930	Broken Keyboard	20.00	20.00	0.00	0.00	03/23/2022	  		

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:

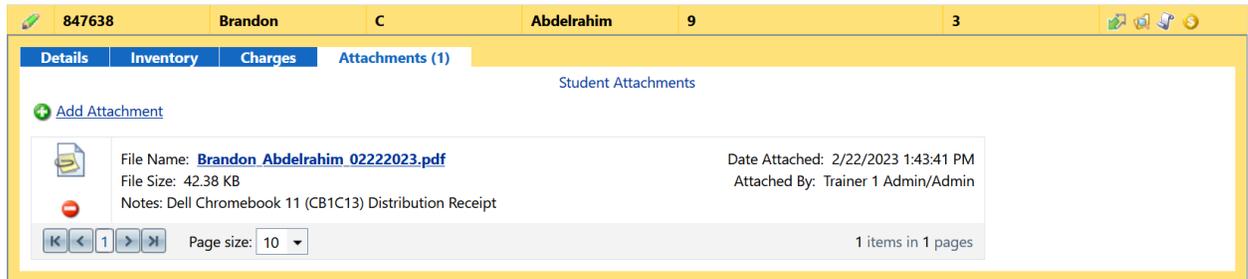
- Product Name: Alphabetically by product, then non-product

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.

Add Attachment

Attachment:

Notes:

Maximum Upload File Size: 1MB



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

- Decide on whether to decentralize collections, to collect at each campus, or to collect at another specified collection site.
- 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 labeled with school names for easy reference.

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.

Archiving Staff

The "Archive Staff" tool allows district-level administrators to set large groups of staff to "Inactive."

Staff eligible for this process must meet the following criteria:

- No inventory currently assigned to them
- No unsatisfied charges assigned to them

Note: All active staff will reappear with the next update from the district's Student Information System or HR System import.

Archive Staff with No Obligations

1. Click on **Archive**, located in the "Admin Tools" Quick Links menu. The "Archive" window opens.
2. Select **Staff** from the **Archive** drop-down menu.
3. Select the respective site(s) from the **Sites** drop-down menu.
4. Select the respective staff type(s) from the **Staff Types** drop-down menu.
5. Select the respective grade(s) from the **Grades** drop-down menu.
6. Click on  **GO**. The "Confirm Archive" window opens and displays the quantity of staff to inactivate.
7. Click on  **Staff Selected for Archive** to open a report, in CSV format, to review the staff being archived.
8. If prompted "Do you want to open or save csv...," click on **Open**.
9. Confirm the number of staff selected by typing the staff quantity into the **Confirm the count by typing it here** field.
10. Click **Confirm**. The "Archive Inventory" window opens and displays a success statement.
11. Click **OK**.

12. Click on  **Close** to close the "Archive" window.

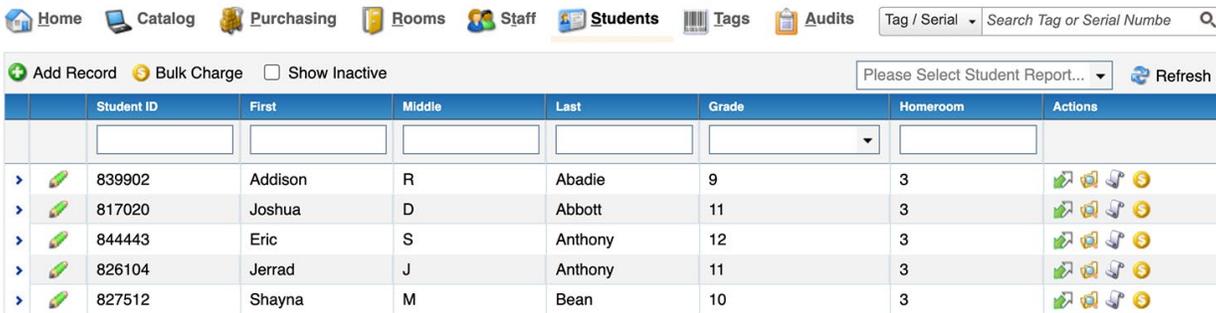
Students

Student 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.



	Student ID	First	Middle	Last	Grade	Homeroom	Actions
>	839902	Addison	R	Abadie	9	3	    
>	817020	Joshua	D	Abbott	11	3	    
>	844443	Eric	S	Anthony	12	3	    
>	826104	Jerrad	J	Anthony	11	3	    
>	827512	Shayna	M	Bean	10	3	    

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	
<p>Search Fields</p>	<p>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</p>
<p> Edit</p>	<p>Allows a site user to add/edit the respective student's details</p>
<p> Issue Inventory to Student</p>	<p>Under Actions, allows a site user to issue an item(s) to the respective student</p>
<p> Inventory History</p>	<p>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</p>
<p> View Transaction Receipt Report</p>	<p>Under Actions, displays a list of all products and the respective tag numbers issued to the student (PDF format)</p>
<p> Assess Charge</p>	<p>Under Actions, allows charges to be assessed to a student for lost/stolen items and/or accessories</p>

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.

817020	Joshua	D	Abbott	11	3
Details Inventory Charges Attachments					
Student: Joshua D Abbott					
Student ID: 817020	Address 1: 5096 Charles St		Student E-Mail: hss_training@frontlineed.com		
First: Joshua	Address 2:		Parent E-Mail: hss_training@frontlineed.com		
Middle: D	City: Austin		Notes:		
Last: Abbott	State: TX				
Grade: 11	Zip: 78623				
Homeroom: 3	Phone: 915-867-9305				

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.

[Home](#)
[Catalog](#)
[Purchasing](#)
[Rooms](#)
[Staff](#)
[Students](#)
[Tags](#)
[Audits](#)
 Tag / Serial Search Tag or

+ Add Record

 Show Inactive
 Please Select Student Report...

	Student ID	First	Middle	Last	Grade	
	<input type="text"/>	--- PDF ---				
						Barcode IDs
						Full Charges Receipt
						Transaction Receipts
						--- Excel ---
>	839902	Addison	R	Abadie	9	Accessory Listing
>	817020	Joshua	D	Abbott	11	Charge Listing
>	844443	Eric	S	Anthony	12	Inventory Due Date Listing
>	826104	Jerrad	J	Anthony	11	Student Inventory Status
>	827512	Shayna	M	Bean	10	Sent Students Receipts
>	849916	Maria	M	Beard	11	Student Listing
>	839841	Jessica	M	Bowser	11	Charge Activity Listing
>	836581	Taylor	J	Boyce	11	Students with No Distributions
>	843015	Jesus		Caballero	9	

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 Student 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 range** 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.

Issue Inventory

 [Done](#)

Student ID:    

Student Name: **Brandon C Abdelrahim**

Due Date:   

Tag / Serial: 

Current Inventory:

Please Select Inventory Report... 

Product Number	Product	Tag	Status	Scan Date	Source
2000057	HP Mini 110-1126NR	5540	In Use	12/08/2020	Student: Brandon C Abdelrahim

  **1**   Page size: 1 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: 1 items in 1 pages

 [Done](#)

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.

Quick Collect

[Done](#)

Collect to:

Return to Room:
ROOM NUMBER REQUIRED

Room Description:

Collect to Status:

Status Notes:

Tag / Serial:

Scan History for Today:

Product	Tag	Source	Destination	Reports	Actions
No records to display.					

Page size: 0 items in 1 pages

[Done](#)

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.

Quick Collect

[Done](#)

Collect to:

Pickup Location:

Pickup Room Description:

Add to Transfer:

Destination Site:

Collect to Status:

Status Notes:

Tag / Serial:

Scan History for Today:

Product	Tag	Source	Destination	Reports	Actions
HP Mini 110-1126NR	5540	Student: Brandon C Abdelrahim	Room: 600	<input type="text" value="Reports..."/>	

Page size: 1 items in 1 pages

[Done](#)

- 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.
- 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.
- Select the tag status from the **Collect to Status** drop-down menu.
- (Optional) Enter notes in the **Status Notes** field.
 - Click on **Lock/Unlock** to secure.
- Verify the tag number in the "Tag" field.
- 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.

Assess a Charge

Individual: Brandon C Abdelrahim

Charge Type: **Charger - Chromebook**

Suggested Percentages: 100% = \$0.00, 75% = \$0.00, 50% = \$0.00, 25% = \$0.00

Product and Tag:

Show History

	Product Number	Product Name	Tag	Status	Scan Date	Actions
C	2000027	Hayes Infinity (MGH1990)	T31501	In Use	02/27/2023	Select

Page size: 10 1 items in 1 pages

Charge Amount:

Charge Notes:

Payment Information (Optional)

Payment Date:

Amount:

Satisfied:

Payment Notes:

Charge History for: Brandon C Abdelrahim

Product Name	Charge Type	Charge Amount	Amount Due	Date Satisfied	Notes
None	Lab Fee	15.00	15.00		N

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.

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

- Click on  **Students**, located in the top navigation bar.
- Filter for the respective student.
- 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.
- 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: <input style="width: 150px;" type="text" value="5540"/>	Price: \$380.00 <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Suggested</td> <td style="padding: 2px;">100%= \$380.00</td> <td style="padding: 2px;">75%= \$285.00</td> </tr> <tr> <td style="padding: 2px;">Percentages:</td> <td style="padding: 2px;">50%= \$190.00</td> <td style="padding: 2px;">25%= \$95.00</td> </tr> </table>	Suggested	100%= \$380.00	75%= \$285.00	Percentages:	50%= \$190.00	25%= \$95.00
Suggested	100%= \$380.00	75%= \$285.00					
Percentages:	50%= \$190.00	25%= \$95.00					

Charge Type: <input style="width: 150px;" type="text" value="Broken Keyboard"/> Charge Amount: <input style="width: 150px;" type="text" value="\$20.00"/> Satisfied: <input checked="" type="checkbox"/>	Charge Notes: <input style="width: 150px; height: 40px;" type="text" value="Please enter notes here..."/> Void: <input type="checkbox"/>
--	---



- Select **Void**.
- 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."
- Click **OK**.
- 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.

New Payment

Charge Type: Broken Keyboard Charge Amount: \$20.00 Amount Due: \$20.00	Charge Notes: <input style="width: 90%;" type="text" value="Please enter notes here..."/>
Payment Date: <input style="width: 80%;" type="text" value="2/27/2023"/>  Amount: <input style="width: 80%;" type="text" value="Enter a dollar amount."/> Satisfied: <input type="checkbox"/>	Payment Notes: <input style="width: 90%;" type="text" value="Please enter notes here..."/>

Charge History for: Brandon C Abdelrahim

Payment Date	Amount	Received By	Site Name	Notes
No records to display.				

Page size:
0 items in 1 pages

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.

The screenshot shows a dialog box titled "Issue Refund" with a close button (X) in the top right corner. The dialog contains the following fields:

- Individual: Brandon C Abdelrahim
- Charge Type: Broken Keyboard
- Charge Amount: \$20.00
- Amount Received: \$20.00
- Refund Amount: 20.00 (This field is highlighted with a red border and a blue selection bar.)
- Refund Notes: (An empty text area)

A green "Save" icon is located in the bottom right corner of the dialog box.

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.

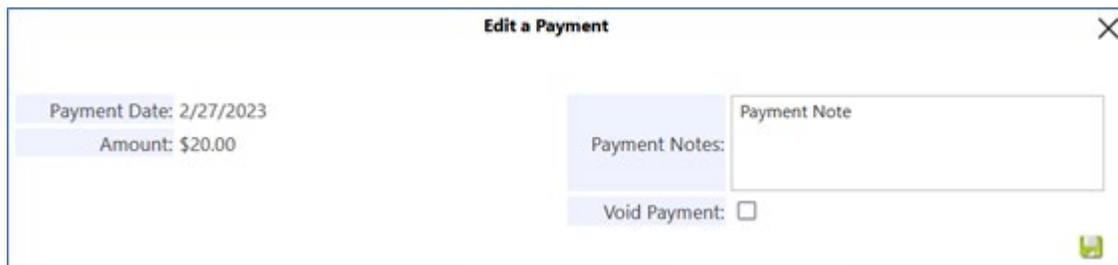
Void a Charge Payment

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**.

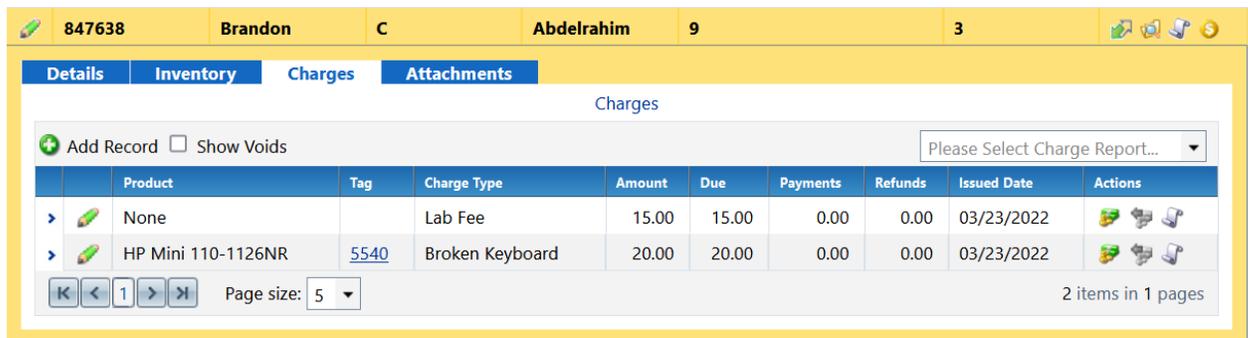
Student Charge Receipts

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.



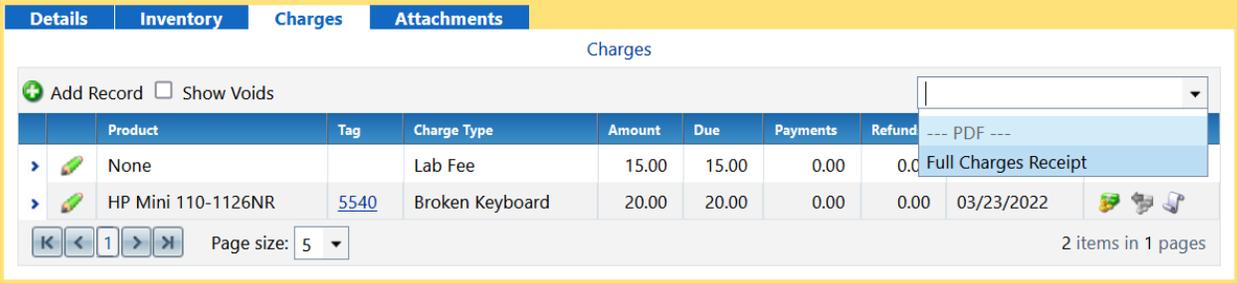
Product	Tag	Charge Type	Amount	Due	Payments	Refunds	Issued Date	Actions
> None		Lab Fee	15.00	15.00	0.00	0.00	03/23/2022	
> HP Mini 110-1126NR	5540	Broken Keyboard	20.00	20.00	0.00	0.00	03/23/2022	

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.



	Product	Tag	Charge Type	Amount	Due	Payments	Refund	
>	None		Lab Fee	15.00	15.00	0.00	0.0	--- PDF --- Full Charges Receipt
>	HP Mini 110-1126NR	5540	Broken Keyboard	20.00	20.00	0.00	0.00	03/23/2022

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.

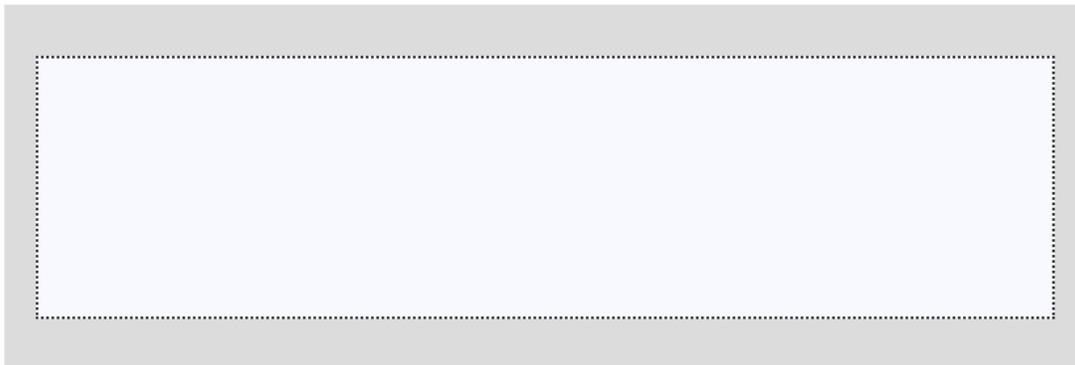
Issuing a Distribution Receipt to Student

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**.

Sign Receipt



Decline Signature



Clear Signature



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 your 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.

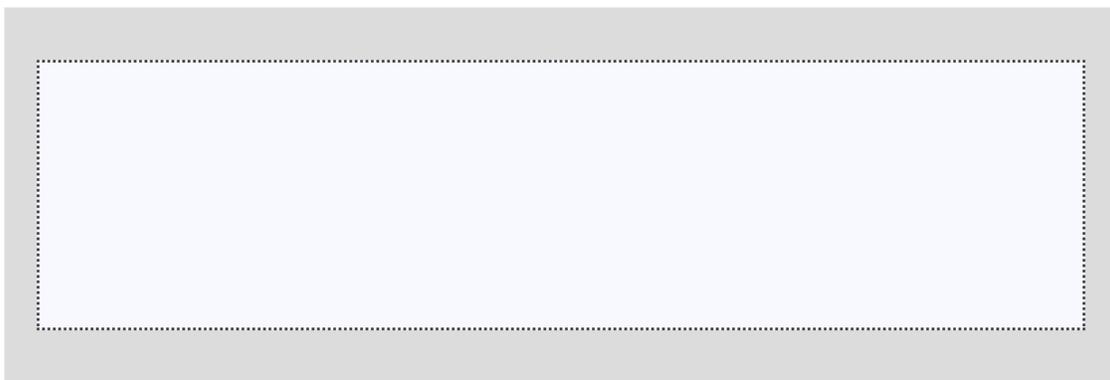
[View/Sign a Collection Receipt from Student](#)

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**.

Sign Receipt



 Decline Signature

 Clear Signature

 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.

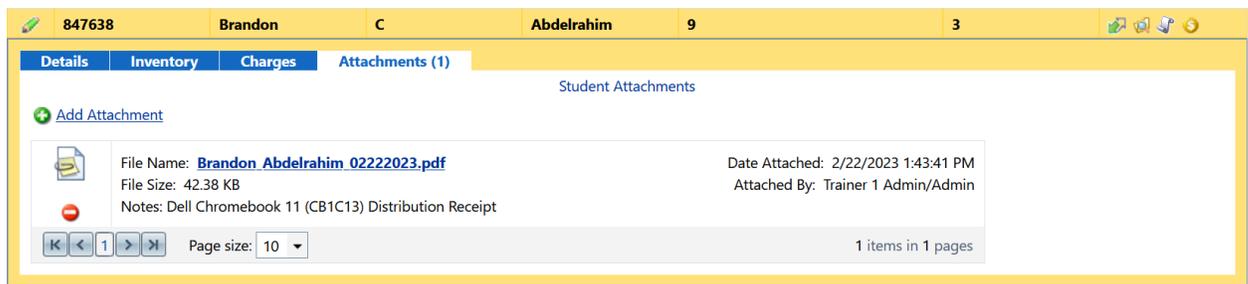
Bulk charges are applied to every student listed in the Students grid. To apply the charge to a subset of students (for example, 8th graders), filter the records in the Students grid prior to applying the charge.

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.

Add Attachment

Attachment:

Notes:

Maximum Upload File Size: 1MB

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.

Click  **Save**.

Archiving Students

The "Archive Students" tool allows district-level admins to set large groups of students to "Inactive."

Students eligible for this process must meet the following criteria:

- No inventory currently assigned to them
- No unsatisfied charges assigned to them

Note: All active students will reappear with the next update from the district's Student Information System import.

Archive Students with No Obligations

1. Click on **Archive**, located in the **Admin Tools Quick Links** menu. The "Archive" window opens.
2. Select **Students** from the **Archive** drop-down menu.
3. Select the respective site(s) from the **Sites** drop-down menu.
4. Select the respective grade(s) from the **Grades** drop-down menu.
5. Click on  **GO**. The "Confirm Archive" window opens and displays the quantity of students to inactivate.
6. Click on **Students Selected for Archive** to open a report, in CSV format, to review the students being archived.
7. If prompted "Do you want to open or save csv...," click on **Open**.
8. Confirm the number of students selected by typing the student quantity into the **Confirm the count by typing it here** field.
9. Click **Confirm**. The "Archive Inventory" window opens and displays a success statement.
10. Click **OK**.
11. Click on  **Close** to close the "Archive" window.

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** 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.

Issue Inventory

[Done](#)

Staff ID: 📄 🔒 🔑 🔄

Staff Name: **Nilay Adock**

Due Date: 📅 🔒 🔑 🔄

Tag / Serial: 📄

Current Inventory: Please Select Inventory Report... ▾

	Product Number	Product	Tag	Status	Scan Date	Source
A	2000033	Dell Latitude 3301	5434	In Use	02/22/2023	Room: 600
	2000057	HP Mini 110-1126NR	5499	Lost	12/08/2020	Staff: Nilay Adock

⏪ ⏩ 1 ⏪ ⏩ Page size: 10 ▾ 2 items in 1 pages

[Done](#)

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.

✕

Staff to Staff Transfer Confirmation



Tag **T51937** is currently assigned to **Kendra Harper**.

Please confirm that you want to transfer **HP Chromebook 11 G8 EE** and the listed accessories to **Nilay Adock**.

Name	Description	Price	Issued	Collected
Chromebook Charger	Chromebook Charger	40.00	0	<input type="text" value="0"/>

K
<
1
>
>>

Page size:
5
▼

1 items in 1 pages

Confirm
Cancel

- 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:    

Student Name: **Sean M Bouldin**

Due Date:   

Tag / Serial: 

Current Inventory: Please Select Inventory Report... ▾

	Product Number	Product	Tag	Status	Scan Date	Source
	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
	2000035	HP Chromebook 11 G8 EE	T51911	In Use	12/07/2020	Student: Sean M Bouldin

 Page size: 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

 Page size: 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.

Quick Collect

[Done](#)

Collect to:

Return to Room:

Room Description:

Collect to Status:

Status Notes:

Tag / Serial:

Scan History for Today:

Product	Tag	Source	Destination	Reports	Actions
HP Mini 110-1126NR	5517	Staff: Todd Ward	Room: 600	<input type="text" value="Reports..."/>	
Dell Latitude 3301	5434	Staff: Nilay Adock	Room: 600	<input type="text" value="Reports..."/>	

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

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

 [Done](#)

Quick Collect

Collect to:

Pickup Location:    

Pickup Room Description:

Add to Transfer:    

Destination Site:

Collect to Status:

Status Notes: 

Tag / Serial: 

Scan History for Today:

Product	Tag	Source	Destination	Reports	Actions
HP Mini 110-1126NR	5517	Staff: Todd Ward	Room: 600	<input type="text" value="Reports..."/>	
Dell Latitude 3301	5434	Staff: Nilay Adock	Room: 600	<input type="text" value="Reports..."/>	

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.



The image shows a search input field with a dropdown menu on the left containing the text 'Tag / Serial' and a search icon on the right.

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.

Tag Information ✕

Tag/Serial: ✔ Quick Verify Select Action... ▾

Detail	Status History	Audit History	Ticket History	Components	Attachments (1)
Tag:	<input style="border: 1px solid red;" type="text" value="T31507"/>			Image Date:	<input type="text" value="06/15/2020"/>
Serial:	<input style="border: 1px solid red;" type="text" value="MW1227261965"/>			Device Name:	
Site:	Learning Campus			External IP:	
Location:	Room: 600			Internal IP:	
Status:	Available			Last Login Date:	
Date:	02/10/2021			Last Login User:	
				Last Seen Date:	
				LAT/LONG:	
				MAC Address:	
				MDM Status:	
				OS:	
				Asset Condition:	<input type="text" value="Select an Asset Condition"/>
				Due Date:	
Tag Notes:	<input style="width: 100%; height: 40px;" type="text"/>				

Save
 Close

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 Lifecycle Report."
5. Click on **Update**.
6. Click on **Close** to close the "Tag Information" window.

Edit a Tag's Funding Information

Editing a tag's "Funding Information" is only available for tags with a "Source" of "Initial." An initial source indicates that an asset was added to the database without "Purchase Order" information.

Administrative users and site users must first be logged into the site the tag is located to edit a tag's Funding 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 in the "Funding Information" section.

Funding Information:

Source: Initial	Account Code:
Order Number:	Purchase Date: 01/01/2018
Vendor:	Purchase Price: \$259.99
Funding Source: 1300-Technology	Invoice Date:
FRN:	Invoice Number:
State Funding:	Expiration Date: 01/01/2023
Federal Funding:	



5. Edit the **Funding Source**, **Purchase Date**, and **Purchase Price**, as needed, or select **Associate to Purchase Order**. (**Associate to Purchase Order** is available for Administrative Administrators only.)
6. Review and verify the information is correct.
7. Click on  Update. The window refreshes and updates the "Funding Information."
8. Click on  **Close** to close the "Tag Information" window.

Associate a Tag to a Purchase Order

Editing a tag's "Funding Information" is only available for tags with a "Source" of "Initial." An initial source indicates that an asset was added to the database without "Purchase Order" information.

Associating a tag to a "Purchase Order" allows administrators to associate an initialized tag to a specific product line on a purchase order and have the funding information automatically matched.

1. Click within the **Tag/Serial Search** field, located on 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 in the "Funding Information" section.
5. Select **Associate to Purchase Order**. The "Associate to Purchase Order" window opens.

Associate to Purchase Order ✕

[✕ Cancel](#)

Purchase Order

Funding Info

Confirmation

Select a Purchase Order

Order Number	Purchase Date	Vendor	Status	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Refresh
07-020101	04/10/2020	Nationwide Bus Sales	Closed	Select
10292016	08/26/2019	All Things Digital	Open	Select
111782	05/30/2020	Hayes	Closed	Select
122684	07/15/2020	Hayes	Closed	Select

6. Search for the respective purchase order.
7. Click on **Select**, located in the respective purchase order's row. The window updates with the "Purchase Order Details" and "Product Details."
8. Click on **Select Product Line on Purchase Order** to associate a tag with a product line. The window updates with the purchase order product lines.

9. Select a product line from the grid. The window returns to the previous screen and "Funding Source," "Account Code," "Purchase Price," and "Department" fields are automatically populated.
 1. To manually update the **Funding Source**, **Purchase Price**, and/or **Account Code**, enter the information into the corresponding fields.
10. Click on  **Final Confirmation**. The window updates with the new funding information. The "Associate to Purchase Order" window displays the following message "Confirm that the Following information is correct and click 'GO' to add the tag to the purchase order. Note that this action cannot be undone."
11. Click on  **GO**.
12. Click on  **Close** to close the "Associate to Purchase Order" window.

Remove Tag from a Purchase Order

If an asset has been brought into the database via the "Purchasing" grid and associated to the wrong "Purchase Order," it can be removed from that "Purchase Order."

Administrative users and site users must first be logged into the site the tag is located to edit a tag's Funding Information.

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

Funding Information:

Source: Order	Account Code: 83-081-0555-18-002
Order Number: 111782 	Purchase Date: 05/30/2020
Vendor: Hayes	Purchase Price: \$501.27
Funding Source: 1300-Technology	Invoice Date:
FRN:	Invoice Number:
State Funding:	Expiration Date: 05/30/2025
Federal Funding:	

[Remove Tag From Order](#)

4. Click on  **Remove Tag from Order**, located in the "Funding Information" section.
5. Click **OK** in the "Remove Tag from Order" confirmation window.
6. Click on  **Close** to close the "Tag Information" window.

Edit a Tag's Assigned Product

Editing a tag's assigned product number is only available for tags with a "Source" of "Initial." An initial source indicates that an asset was added to the database without "Purchase Order" information.

Administrative users and site administrators must be logged into the site the tag is located to edit a tag's assigned product number.

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

Tag / Serial ▾



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.

Product Information:

Product: 24" ViewSonic VG2456 LED 

Number: 2000031 

Product Type: Monitor

Manufacturer: ViewSonic

Model: VG2456

Suggested Price: \$260.00

Product Notes:



4. Click on  **Edit**, located next to the "Product Number" field in the "Purchasing Information" section.
5. Search for the respective product.
6. Click on **Select**, located in the respective product's row. The window updates with the selected product's information.
7. Review and verify the "Current Product" and "Selected Product" information is correct.
8. Click on  **Update**. The window refreshes to show the newly assigned product.
9. Click on  **Close** to close the "Tag Information" window.

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.
- Review **Bulk Edit**, located on the "Tags" page above the blue grid header, to edit multiple tags at once, as well as the **Purchase Price**, **Purchase Date**, **Funding Source**, and **Status** (only available to administrative-level users).
- 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** in the "Purchasing" grid.

Update Tag Locations 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".

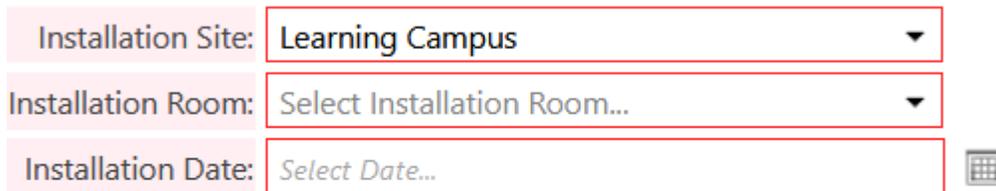
Set Tag Installation Information for a Single Tag

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.

Set Installation Location and Date



 **Note: Installation details cannot be edited once they are set.**

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

Detail	Status History	Audit History	Ticket History	Components	Attachments
Tag: 5456					
Serial: ANT209035					
Site: Learning Campus					
Location: Room: 600					
Asset Type: Parent					
Status: Available					
Scan Date: 02/10/2021					
RFID: Not Enabled					
				Device Name:	
				External IP:	
				Internal IP:	
				Last Login Date:	
				Last Login User:	
				Last Seen Date:	
				LAT/LONG:	
				MAC Address:	

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."

The screenshot shows the 'Tag Information' window for tag 5456. The 'Components' tab is active, displaying a table of assets assigned to this tag. The table has columns for Product Name, Product Type, Tag, Serial, and Action. Three Dell Latitude 3301 laptops are listed with tags 5354, 5356, and 5357.

Product Name	Product Type	Tag	Serial	Action
Dell Latitude 3301	Laptop	5354	KL9R468	[Remove] [Scan]
Dell Latitude 3301	Laptop	5356	KL9R469	[Remove] [Scan]
Dell Latitude 3301	Laptop	5357	KL9R470	[Remove] [Scan]

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

The screenshot shows a search field with the text 'Tag / Serial' and a search icon.

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** 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.

A search input field with a dropdown menu on the left labeled "Tag / Serial" and a magnifying glass icon on the right.

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 **J** 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.

A search input field with a dropdown menu on the left labeled "Tag / Serial" and a magnifying glass icon on the right.

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 screenshot shows the 'Search Tags' interface. On the left, there are three buttons: 'Save Search', 'Save Search As', and 'Saved Searches'. The main area is divided into two sections: 'Basic Filters' and 'Advanced Filters'. The 'Basic Filters' section contains several dropdown menus and search boxes: 'Site Name' (Please select), 'Location' (Please select), 'Product Type' (Please search), 'Status' (Please select), 'Asset Type' (Please select), 'Manufacturer' (Please search), 'Funding Source' (Please select), 'Vendor' (Please search), and 'Grade' (empty). Below the filters are two icons: a refresh icon and a 'GO' button.

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” (relative 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" (relative 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 (relative 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

Tag	Serial	Product Number	Product Name	Manufacturer	Product Type	Site Name	Location	Asset Type	Status	Vendor	Funding Source	Grade	Email	Parent Email
B100100	Y386GH4F65525	2000119	2007 Blue Bird Bus (AA 76)	Blue Bird	Bus	Admin Building	Room: Bus Yard	Standalone	In Use	Nationwide Bus Sales	0900-District			
B100101	Y386GT4F69556	2000119	2007 Blue Bird Bus (AA 76)	Blue Bird	Bus	Admin Building	Room: Bus Yard	Standalone	In Use	Nationwide Bus Sales	0900-District			
B100102	Y386RT4F79564	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 screenshot shows a table with columns: Tag, Serial, Product Number, Manufacturer, Product Name, Product Type, Site Name, Location, and Asset Type. A dropdown menu is open in the upper right corner, listing report options: PDF, Inventory Quantity Report, Excel, Archived Inventory, Components Listing, E-Rate Report, and Model End of Life.

Tag	Serial	Product Number	Manufacturer	Product Name	Product Type	Site Name	Location	Asset Type
T500151	A234001150	2000121	Dell	Dell Chromebook 11 (CB1C13)	Chromebook	Charles Bailey HS	Student: Jacklyn K Sheppard	Standalone
T500152	A234001151	2000121	Dell	Dell Chromebook 11 (CB1C13)	Chromebook	Charles Bailey HS	Room: 11111	Standalone
T500153	A234001152	2000121	Dell	Dell Chromebook 11 (CB1C13)	Chromebook	Charles Bailey HS	Room: 11111	Standalone
T500154	A234001153	2000121	Dell	Dell Chromebook 11 (CB1C13)	Chromebook	Charles Bailey HS	Room: 11111	Standalone
T500155	A234001154	2000121	Dell	Dell Chromebook 11 (CB1C13)	Chromebook	Charles Bailey HS	Room: 11111	Standalone

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.

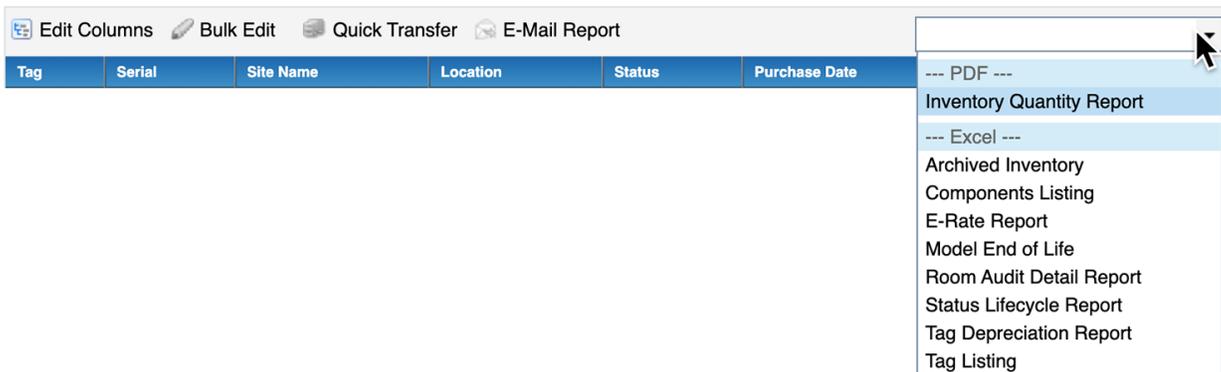


- **Status Lifecycle Report** - downloads, in .CSV format, a list of the tags displayed (within the Tags grid) every time each tag was in a particular status (user selects the desired Status and Date Range within the Status Lifecycle Report window).
- **Tag Depreciation Report** - displays, in .CSV format, 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.

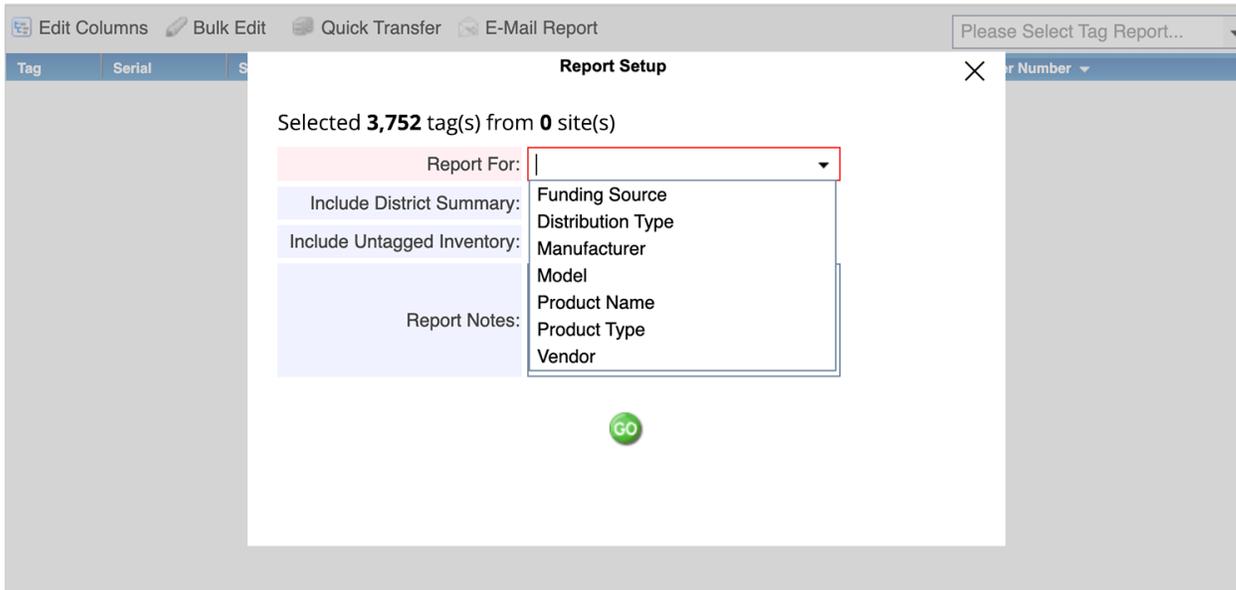


Inventory Quantity Report

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**. 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** drop-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**, 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.

Quick Transfer
✕

Transfer Details

Transfer Type: Site to Site ▼

+ Create a new transfer

Tag Details

Selected **6** tag(s) from **2** site(s)

[View Inventory Details](#)

Transfer from Site(s): All items checked ▼

Destination Site: Learning Campus ▼

Destination Room: 200 ▼

Status: Available ▼

Status Notes: Transfer to correct site

GO

Perform a Site-to-Site Quick Transfer

1. Click on  **Tags**, located in 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 **Site to Site** using the **Transfer Type** drop-down menu.
5. Click on  **Create a New Transfer**.
6. Select the site(s) where the tags are currently located using the **Transfer from Site(s)** drop-down menu.
7. Review the "Tag Details" box to verify the number of tags available to transfer. Only "Available" tags qualify for this process.

8. Select the destination site from the **Destination Site** drop-down menu.
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**. The "Site to Site Transfer" window opens.
13. Confirm that the number of tags displayed in red and the destination site are accurate.
14. Type in the confirmation word (case sensitive) displayed on the "Site to Site Transfer Confirmation" window.
15. Click on **Confirm**. A processing window opens and displays the progress of the transfer.
16. The "Transfer Complete" window opens and displays the message "Transfer Completed Transfer Successful."
17. Click **OK**.

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**. 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.

Initiate a Site-to-Site Transfer

Asset Management allows items to be moved from one site to another through the process called "Site-to-Site Transfers." The site currently storing the items initiates the transfer by identifying each tag to send, and the destination site receives the transfer by confirming each tag received.

Site-to-Site Transfers do not allow tags in the status of "Lost" or "Stolen" to be transferred. Scanning or typing one of these tag numbers into the transfer will result in an error and the tag status will need to be updated to add it successfully to the transfer.

1. Click on **Initiate Transfer** under "Transfer Tools Quick Links." The "Initiate Transfer" window opens.
2. Select the site receiving the item(s) from the **Destination** drop-down menu.
3. Click on  **Create New Transfer** next to the "Destination" field.

Initiate Transfer ×

Transfer Details

Transfer #: ↓ ↻

Type: Site to Site

Status: New

Destination: Learning Campus

Actions

 Submit Transfer

 Delete Transfer

 Print Transfer Ticket

Submitted Approved Scheduled In Transit Receiving Completed



Tagged Inventory to Transfer ↑

Tag / Serial: ↓ ↻

Tag	Product Number	Product Name	Previous Status	Actions	
C	3817	2000064	Lenovo ThinkCentre M57e	In Use	

⏪ ⏩ 1 ⏴ ⏵ Page size: 10 1 items in 1 pages

Untagged Inventory to Transfer ↓

Transfer Notes ↓

4. For tagged items, enter/scan the **Tag Number** or **Serial Number** into the **Tag/Serial** field, located in the "Tagged Inventory to Transfer" section.

If the tag(s) added to the transfer are an Asset Type of "Component" or "Parent," an additional warning screen will display to verify the transaction. Review "Components Overview" for more details.

5. For untagged items, click on **Untagged Inventory to Transfer** to expand this section.
6. Enter/scan the product number in the **Product Number** field, OR  **Search** to select the respective untagged product.
7. Enter an alpha/numeric value in the **Identifier** field.

The "Identifier" is an alphanumeric value of up to 25 characters (such as a serial number) used to provide extra identifying information of untagged inventory. The identifier is associated with the quantity of the untagged inventory entered. No two quantities of the same product can have the same Identifier.

8. Enter the quantity to transfer into the **Quantity** field.
9. Click on  **Add Untagged Inventory**.
10. For transfer notes, click on **Transfer Notes** to expand this section. Type any notes regarding the transfer in the text box.

"Transfer Notes" communicating specific details about a transfer can be added when initiating a transfer. They can be edited in various stages of the transfer: while the transfer is in the status of "New," "Pending Approval," or "Submitted" (for Site-to-Site Transfers or Site-to-Warehouse Transfers), and while the transfer is in the status of "New," "Pending Approval," "Submitted," "Delayed," or "Scheduled" (for Warehouse-to-Site Transfers).

11. Click  **Save**. A "Transfer Notes Saved" message displays.
12. Click  **Submit Transfer** at the top right side of the "Initiate Transfer" window, located in the "Actions" section. This puts the transfer in the status of "Submitted." (If the user submitting the transfer also has permissions to approval the transfer, or the transfer does not require approval, the transfer will be in a status of "Approved").



13. Click on  **Ship Transfer**. The "Print Transfer Ticket" section populates, and if signatures are required, a signature box will appear for the person delivering the items to the designation site.
14. Collect signature if required, click **Accept Signature** and type the name of the person who signed, then click **Complete Signature**. This places the transfer into a status of "In Transit."
15. Click  **Print Transfer Ticket** if a printed ticket is desired.
16. Click on  **Close** to close the "Initiate Transfer" window.

The transfer ticket remains with a status of "In Transit" until all items are received in full. Once the items are received, the status changes to "Complete."

Receiving a Site-to-Site Transfer

Asset Management allows items to be moved from one site to another through a process called "Site-to-Site Transfers." The site currently storing the items initiates the transfer and the destination site receives the transfer.

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

"Transfer Notes" communicating specific details about a transfer can be added when initiating a transfer. They can be edited in various stages of the transfer: while the transfer is in the status of "New," "Pending Approval," or "Submitted" (for Site-to-Site Transfers or Site-to-Warehouse Transfers), and while the transfer is in the status of "New," "Pending Approval," "Submitted," "Delayed," or "Scheduled" (for Warehouse-to-Site Transfers). "Transfer Notes" will display username of the note creator and the time and date created. *Only* the note creator can edit or delete a note they have posted.

Receiving a Transfer

Printed "Transfer Tickets" may be sent with the transferred items. These tickets can assist the user at the destination site in finding the correct transfer and verifying items and quantity received.

1. Click the **Transfers Ready to be Received** link in the "Notifications" panel of the **Home** page dashboard. The "Transfers Ready to be Received" window opens.
2. When receiving transfers using "Receive Transfer" under the "Transfer Tools Quick Links," the "Transfer Search" window opens. Hide transfers in the status of "Complete" by deselecting "Show Completed," located above the blue grid header.
3. Locate the respective transfer and select  **View Transfer** under the "Actions" column. The "Receive Transfer Window" opens.

Receive Transfer ✕

Transfer Details	Actions
Transfer #: <input style="border: 1px solid red;" type="text" value="5095"/> 📄 🔗	<div style="margin-bottom: 10px;"> Sign Transfer Ticket </div> <div> Print Transfer Ticket </div>
Type: Site to Site	
Status: Receiving	
Origin: Charles Bailey HS	

Submitted Approved Scheduled In Transit Receiving Completed

Inventory cannot be received until the transfer ticket is signed.

4. The "Transfer Ticket" contains the tag numbers in the respective site-to-site transfer. If you require another copy of the "Transfer Ticket," select **Print Transfer Ticket** on the "Receive Transfer" window.
5. Click on **Sign Transfer Ticket** to begin the receiving process.
 1. Use your mouse or touch the screen to digitally sign, then click **Accept Signature**.
 2. Enter name of receiver and click **Complete Signature**.
6. Click **Tagged Inventory** to expand that section and begin the process of verifying received tagged items.
7. Select the respective **Room** for item placement using the **Room** drop-down menu.
8. Select the **Status** of the item(s) being received or select **Use Previous Tag Status**.
9. Enter/scan the **Tag Number** or **Serial Number** into the **Tag/Serial** field. If you manually enter the number, click on **Receive** to issue this item to the respective room.
10. Continue to enter/scan tag numbers until the check icon (indicates all tags for this product received), located under the "Complete" column, turns green for each tagged product on the transfer.
11. For transfer notes, click on **Transfer Notes** to expand this section. Type any notes regarding the transfer in the text box.

For Untagged Items

12. Enter the container number into the **Container** field or  **Search** for the container number.
13. Click on  **Receive Container Inventory**.
14. Continue to enter/scan tag numbers or serial numbers until the check icon (indicates all tags for this product received), located under the "Complete" column turns green for each tagged product on the transfer.
15. Click on  **Close** to close the "Receive Transfer" window.

The "Transfer Ticket" remains with a status of "In Transit" until all items are received. Once the items are received, the status changes to "Complete."

Approving Transfers

This article discusses transfer approval.

When approval restrictions are set for transfers, a notification appears under "Transfer Notifications" in the "Notifications" panel on the **Home** page dashboard.

Transfer Notifications

Transfers Pending Approval: 2

Transfers Denied: 0

Transfers Ready to be Received: 0

Transfers Delayed: 0

Partial Transfers - In progress: 0

Transfers that show "Pending Approval" status need approval prior to shipping to destination site.

"Transfer Notes" communicating specific details about a transfer can be added when initiating a transfer. They can be edited in various stages of the transfer: while the transfer is in the status of "New," "Pending Approval," or "Submitted" (for Site-to-Site Transfers or Site-to-Warehouse Transfers), and while the transfer is in the status of "New," "Pending Approval," "Submitted," "Delayed," or "Scheduled" (for Warehouse-to-Site Transfers). "Transfer Notes" will display username of the note creator and the time and date created. *Only* the note creator can edit or delete a note they have posted.

Approve Transfer – Status Pending Approval

1. Click the **Transfers Pending Approval** link on the "Notifications" panel. The "Transfers Pending Approval" window opens.
2. Click on  **View Transfer** under the "Actions" column for the "Pending Approval" line item. The "Receive Transfer" window opens.
3. The user may approve or deny the transfer.
 - To approve:
 1. Click  **Approve Transfer**. The "Transfer Approved" window opens.
 2. Click **OK**.
 - To deny:

1. Click  **Deny Transfer**. The "Deny Transfer" window opens.
2. Fill in the "Name" and "Title," if prompted.
3. Click on  **Go**.
4. Click on  **Close** to close the "Receive Transfer" window.

Approve Transfer – Status "In Transit"

When approval restrictions are set for transfers, a notification appears under "Transfer Notifications" in the "Notifications" panel on the **Home** page dashboard.

Transfers that show "In Transit" status need approval prior to being received at destination site.

1. Click the **Transfers Pending Approval** link on the "Notifications" panel. The "Transfers Pending Approval" window opens.
2. Click on  **View Transfer** under the "Actions" column for the "In Transfer" line item. The "Receive Transfer" window opens.
3. Click  **Approve Transfer**. The screen refreshes.
 1. If receiving a tagged item, proceed to Step 4.
 2. If approving an untagged item, click  **Approve Transfer**. The screen refreshes and the box under the "Complete" column is now checked. No further action is needed to receive these items.
4. Click **OK**.
5. Under the **Received Tagged Inventory** drop-down menu, select **Room**, **Status**, and **Tag**.
6. To keep the tag status the same as when it originated, select **Use Previous Tag Status**.
7. Click on  **Save**. The screen refreshes and the status now shows "Complete."
8. Click on  **Close** to close the "Receive Transfer" window. The screen refreshes and the "Notifications" panel updates.

Approve Transfer – Denied Transfer

When approval restrictions are set for transfers, a notification appears under "Transfer Notifications" in the "Notifications" panel on the **Home** page dashboard.

Transfers that show "Denied" have been declined at the destination site and need to be deleted or revised and resubmitted.

1. Click the **Transfers Denied** link on the "Notifications" panel. The "Transfers Denied" window opens.
2. Click on  **View Transfer** under the "Actions" column for the denied transfer. The "Receive Transfer" window opens.
3. Perform one of the following actions:
 1. To delete a single item, click on  **Delete** for that item.
 2. To delete an entire transfer, click on  **Delete** in the upper-right "Actions" area.
 3. To add or remove needed items, click on  **Submit Transfer** in the upper-right "Actions" area.
4. Click on  **Close** to close the "Receive Transfer" window. The screen refreshes and the "Notifications" panel updates.

Approve Transfer – E-Mail Notification

The administrator can select a setting that automatically generates an e-mail notification that is sent when a transfer needs approval by the recipient. The recipient can then click a link in the e-mail that goes directly to the approval screen. Once there, the recipient can approve or deny the transfer.

The administrator can also select a setting that prompts the application to automatically send an e-mail notification when a transfer needs approval by the recipient. The recipient can click a link in the e-mail that goes directly to the approval screen. This allows the recipient to approve or deny the transfer without logging into Asset Management.

1. In the "Transfer Pending Approval" e-mail, locate the sentence reading, "To approve or deny this transfer, click here."

2. Click the **click here** link. The "Transfer Approval" tab opens.
3. Click on  **Approve Transfer** to approve the transfer. The "Approve Transfer" window opens.
4. When prompted, enter your **Name** and **Title** in the appropriate fields.
5. Click on  **GO**.

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	<i>Approved By and Approved On date.</i>
Edited	<i>Last Edited By and Last Edited On date.</i>
Denied	<i>Denied By and Denied On date.</i>
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.

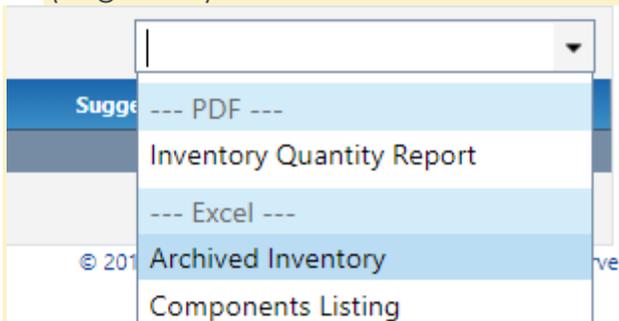
Archiving Inventory (Tags)

Archiving Inventory (Tags) in Asset Management

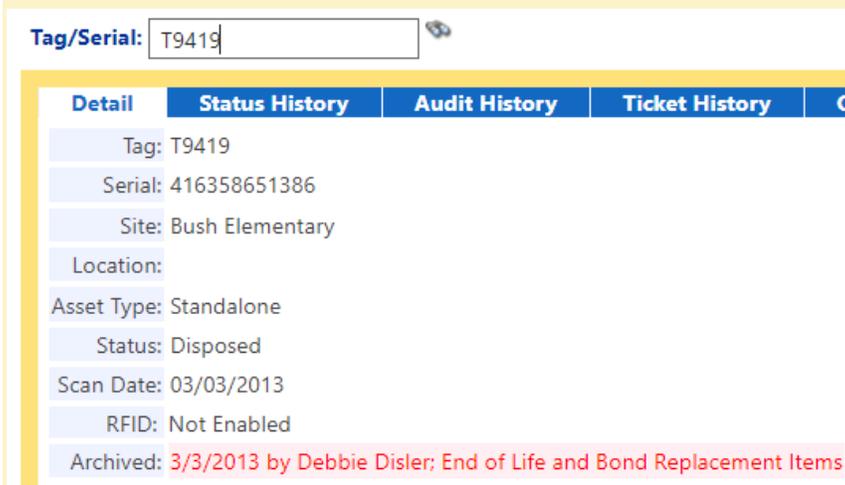
There are two ways to archive inventory in Asset Management.

Assets that are no longer being used for various reasons can be removed from active inventory counts by being archived. Archived assets are removed from active inventory counts based on a specific Site, Status and Status Date.

Note: After tags have been archived, they can be viewed in "Archived Inventory Report (Tags Grid)":



They can also be viewed within "Tag Search" (archived field displays detailed archive information in red):



Archiving Inventory via Archive Tool

The "Archive Inventory" feature is accessible in the Administrative View and requires Administrator credentials. Tags with a status of "Auctioned," "Disposed," "Lost," "Returned to Vendor," "Sold," "Stolen," "Surplus" and/or "Used for Parts" qualify for the archiving process.

Steps to Archive Inventory

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

Switch to site...

Admin Tools

Archive

Data Import

Archive

Archive: Inventory

Filter Tags for Archive

Status: Choose Statuses for Archive...

Prior to Date: Select date...

Site: Choose Sites for Archive...

Notes:



2. (Required) Select the desired tag Status(es) from the "Status" drop-down field.
3. (Required) Select the desired **Prior to Date**.
4. (Required) Select the desired **Site(s)** from the "Site" drop-down field.
5. Enter any notes regarding this batch of archived tags.

6. Click **Confirm**. The "Archive Inventory" window opens with the number of tags selected to be archived.
7. Click on  **Tag(s) Selected for Archive** to open a CSV report and review the tags selected to be archived.
8. Confirm the number of tags selected to archive by typing the tag count into the "Confirm the count by typing it here" field.

3 Tag(s) selected for Archive
Confirm the count by typing it here:

Proceed with Archiving?



Confirm

Cancel

9. Click **Confirm**.
10. Wait until you see the message indicating the archive is successful, then click **OK** to close the "Archive Inventory" window.



Archiving Inventory via Tags Grid

Archive tags via the **Tags Grid** to remove a specific list of Assets from the application. Archived Tags will no longer be included in any reports or statistical graphs within the application. You will still be able to view the "Tag Information" window for any archived asset.

This feature is accessible in the Administrative View Tags Grid and requires Administrator credentials.

Steps to Archive Inventory

1. Navigate to the **Tags**. Using advanced filters, set the criteria to find the tags needing to be archived, then click the **Go** button to view the tags in the filter results.

Caution: It is important that *only* the tags that will be archived are showing in the results grid.

▼ **Advanced Filters**

Tag List
▼
?

4 tags entered

79928

79929

79930

79931

79932

2. Once the tags grid has been populated, choose the **Bulk Edit** option to open the "Bulk Edit" window.
3. In the **Bulk Edit Details** box, choose "Status" as the field to edit. The number of tags to be archived will be displayed in the **Tag Details** box.
4. In the **Update Records To** drop-down, choose the tag status to be archived (e.g., "Disposed," "Surplus," etc.).

Bulk Edit
×

Bulk Edit Details

Field to Edit: Status ▼

Tag Details

Selected **3** tag(s)

0 tag(s) on a **transfer, container**, not listed with their **parent tag**, or are **pending Lost/Stolen** approval, or on an **open audit** have been removed from the edit.

Update Records To: Disposed ▼

Archive Records

Status Notes: Outdated equipment removal ↓

5. Make sure the **Archive Records** checkbox is checked.

6. Include any relevant notes in the **Status Notes** field.
7. Click the **Go** button to archive the tags.

Sites

Sites Grid Overview

Sites are the locations to which you will issue and account for items within your district. The **Sites** page allows an administrative district-level user to create, view, and quickly see products for which each site is responsible.

Sites Functionality

The screenshot shows the 'Sites' page in the TIPWeb-IT Admin interface. At the top, there is a navigation bar with icons for Home, Catalog, Purchasing, Sites, Tags, and Audits. A search bar is present with the text 'Tag / Serial' and 'Search Tag or Serial Number'. Below the navigation bar, there are controls for 'Add Record' and 'Show Inactive'. The main area displays a table with columns: Site ID, Site Name, Contact, Phone, Site Type, and Warehouse. A dropdown menu is open over the Warehouse column, showing options for PDF and Excel reports, including Distribution Status Report, Distribution Inventory Report, Fixed Assets Report, Site Listing, Charge Listing, Charge Activity Listing, Staff Inventory Status Report, Sent Receipts, and Site Transfer Summary Report.

The **Sites** page provides the following reports to be viewed/printed (results are dependent on how the "Sites" grid is filtered).

Sites Grid Function	Description
Add Record	Adds a site to Asset Management
Show Inactive	Allows the user to search for and view inactive sites
Search Fields	Located at the top of the "Catalog" grid, allows the user to search for a specific site using the Site ID, Site Name, Contact, Phone, Site Type, and/or Region search fields

Sites Grid Function	Description
 Edit	Allows an administrative user to add/edit the respective site's details

Sites Details

	999	Admin Building	Valerie Rensi	9158675309	Admin/Dept Building	False	None
--	-----	----------------	---------------	------------	---------------------	-------	------

Details | **Inventory**

Site: Admin Building

Site ID: 999	Shipping Address	Primary Site Contact
Site Name: Admin Building	Address 1: 1111 Tin Street	Name: Valerie Rensi
Site Type: Admin/Dept Building	Address 2:	Phone: 9158675309
Region: None	City: Austin	E-Mail: learning@hayessoft.com
Facility ID:	State: TX, Zip: 78623	Primary Region Contact
Designated Transfer Site: True	Instructions:	E-Mail:
Warehouse: False	Billing Address	Notes:
	Address 1:	
	Address 2:	
	City:	
	State: Zip:	
	Instructions:	

Selecting a site allows a user to view details for the respective site. The **Details** tab displays each site's information, as entered by the district-level administrator.

Detail Tab Function	Description
Site ID	An alpha and/or numeric site number that likely corresponds to the student management system's site ID numbers
Site Name	Name the site/location goes by

Detail Tab Function	Description
Site Type	Description of the different types or groups of sites/locations (such as Elementary Campus, District, Warehouse, etc.)
Region	Description of the different physical locations of the sites (such as North, South, East of River, etc.)
Facility ID	Internal number assigned to facility
Designated Transfer Site	Allows inventory to be transferred to it from another site
Warehouse	Indicates whether the site is a warehouse
Contact	Name of the person responsible for the respective site's instructional technology inventory. The "Inventory" tab displays the products and their respective inventory counts, including "In Use" and "Available" counts.
Phone	Phone number of the site's contact
Email	Email of the site's contact

Detail Tab Function	Description
Shipping Address	Address used when shipping items to this site. The subsequent Address 1, Address 2, City, State, Zip, and Instruction fields pertain to Shipping Address.
Billing Address	Address used when shipping items to this site. The subsequent Address 1, Address 2, City, State, Zip, and Instruction fields pertain to Billing Address.
Primary Site Contact	The subsequent Name, Phone, and Email fields pertain to the person responsible for managing the respective site's inventory
Primary Region Contact	Email of person responsible for the Region's inventory
Notes	General notes pertaining to the site

Sites Inventory

	999	Admin Building	Valerie Rensi	9158675309	Admin/Dept Building	False	None
Details		Inventory					
Inventory by Product							
 Refresh							
Product Number	Product Name	Total Inventory	In Use	Available			
<input type="text"/>	<input type="text"/>						
> 2000001	Cisco 2500 Watt Power Supply	4	4	0			
> 2000002	Cisco UCS 5108 Server Chassis	1	1	0			

Selecting a site allows a user to view the “Inventory” tab for the respective site. The “Inventory” tab displays the products at that site and their respective inventory counts, including “In Use” and “Available” counts.

Inventory Tab Function	Description
Product Number	Product number of product(s) that have been assigned to this site
Product Name	Name of the product(s) that have been assigned to this site
Total Inventory	Quantity of the product(s) assigned to this site
In Use	Quantity of the product tagged and currently having the status of "In Use"
Available	Quantity of the product tagged and currently having the status of "Available"
Site Product Information	Clicking on product in the “Inventory” tab expands the grid and provides more information about the product
Inventory Type	Indicates the “tagged” or “untagged” product
Location Type	Indicates the type of location where the product is situated within the site; includes Rooms, Staff, Students, and Transfers

Inventory Tab Function	Description
In Use	Quantity of the product tagged and currently in the status of "In Use" by location type
Available	Quantity of the product tagged and currently in the status of "Available" by location type
Auctioned	Quantity of the product tagged and currently in the status of "Auctioned" by location type
Disposed	Quantity of the product tagged and currently in the status of "Disposed" by location type
Recycled	Quantity of the product tagged and currently in the status of "Recycled" by location type
 Detailed Inventory	Provides a detailed view of product counts by specific location

Sites Reports

Home Catalog Purchasing **Sites** Tags Audits Tag / Serial Search Tag or Serial Number

+ Add Record Show Inactive

Site ID	Site Name	Contact	Phone	Site Type	Warehouse	
						--- PDF ---
						Distribution Status Report
						Distribution Inventory Report
						Fixed Assets Report
						--- Excel ---
						Site Listing
						Charge Listing
						Charge Activity Listing
						Staff Inventory Status Report
						Sent Receipts
						Site Transfer Summary Report
999	Admin Building	Valerie Rensi	9158675309	Admin/Dept Building	False	
002	Charles Bailey HS	Julia Control	9158675309	Campus - High School	False	
102	Hayes Elementary	Lisa Bass	9158675309	Campus - Elementary	False	
104	Jackson Elementary	Jill Lindsey	9158675309	Campus - Elementary	False	
001	Learning Campus	Todd Ward	9158675309	Campus - High School	False	
042	Learning MS	Hunter Woods	9158675309	Campus - Middle School	False	

The **Reports** drop-down menu in the upper right corner of the "Sites" grid provides several options for access preconfigured reports. Filtering records in the "Sites" grid allows reporting on a subset of records.

Report Detail	Description
Distribution Status Report	Provides a PDF showing qty of assets by Status and Site Available Filters: Site(s), Include District Summary
Distribution Inventory Report	Provides a PDF showing a list of assets by site for a chosen status; includes Tag, Serial, Product Name, and Location fields Available Filters: Site(s), Status
Fixed Assets Report	Provides a PDF showing assets by site; includes Tag, Serial, PO Number, Purchase Date, Product Name, Manufacturer, Model and Purchase Price fields Available Filters: Site(s)

Report Detail	Description
<p>Site Listing</p>	<p>Provides a .csv file listing sites; includes Site ID, Site Name, Site Type, Region Name, Contact, Phone, Email, Warehouse, Designated Transfer Site, Facility ID, Notes, Shipping Address, Instructions for Shipping Address, Billing Address, and Instructions for Billing Address fields Available Filters: Site(s)</p>
<p>Charge Listing</p>	<p>Provides a .csv file listing charges assessed; includes Site ID, Site Name, Location Type, Last Name, First Name, Middle Name, Staff Type, Grade, Homeroom, Product, Tag, Charge Type, Description, Charge Notes, Issue Date, Charge Amount, Amount Paid, Amount Due, and Satisfied Date fields Available Filters: Charges for (staff/student), Issue Date Range, Charge Type, and Charge Issued</p>
<p>Charge Activity Listing</p>	<p>Provides a .csv file listing student charges (satisfied or unsatisfied) and all charge payments; includes Site Name, Location Type, Last Name, First Name, Middle Name, Staff Type, Grade, Homeroom, Product, Tag, Charge Type, Description, Charge Notes, Issue Date, Charge Amount, Activity Date, Activity Type, Activity Amount, Activity Notes, Activity Recorded By, and Satisfied Date fields Available Filters: Charges For, Activity Date Range and Charge Type</p>
<p>Staff Inventory Status Report</p>	<p>Provides a .csv file listing assets currently issued to staff; includes Site ID, Site Name, Staff ID, Last Name, First Name, Middle Name, Grade, HomeRoom, Staff Type, Staff Status, Product, Model,</p>

Report Detail	Description
	<p>Product Type, Suggested Price, Tag, Serial, Asset Type, Parent Tag, Tag Status, Status ID, Scan Date, and Status Notes fields</p> <p>Available Filters: Site(s), Staff Status, and Tag Status</p>
<p>Sent Receipts</p>	<p>Provides a .csv file listing receipts emailed by the system; includes Site ID, Site Name, Location Type, Staff ID, Last Name, First Name, Middle Name, Staff Type, Grade, HomeRoom, Receipt Type, Signed Receipt, Email Date, Student Email, Parent Email, and Email fields</p> <p>Available Filters: Sent Receipt For, Sent Receipt Date Range, and Sent Receipt Type</p>
<p>Site Transfer Summary Report</p>	<p>Provides a .csv file listing transfers for each site by qty; includes Site ID, Site Name, Tags Transferred (qty), and Tags Received (qty) fields</p> <p>Available Filters: Date Range</p>

Running Sites Reports

"Sites" is the Asset Management area where administrators can add locations (sites). The reports include all sites in the district by default. To return a subset of data, users must apply a filter to the records in the grid prior to running the report.

	Site ID	Site Name	Contact	Phone	Site Type	Warehouse
>	999	Admin Building	Valerie Rensi	9158675309	Admin/Dept Building	False
>	002	Charles Bailey HS	Julia Control	9158675309	Campus - High School	False
>	102	Hayes Elementary	Lisa Bass	9158675309	Campus - Elementary	False
>	104	Jackson Elementary	Jill Lindsey	9158675309	Campus - Elementary	False
>	001	Learning Campus	Todd Ward	9158675309	Campus - High School	False

Distribution Status Report

This report, in PDF format, provides administrative users status inventory counts for respective tag statuses issued at the filtered sites, as long as the quantity for the respective status is above 0.

1. Click on **Sites**, located in the top navigation bar.
2. Click the **Please Select Site Report** drop-down menu, located above the blue grid header.
3. Select **Distribution Status Report** under the "--- PDF ---" menu subcategory. The "Filter Report" window opens.
4. Select all sites or specific sites by checking appropriate box(es) from the **Site(s)** drop-down menu.
5. (Optional) Check the **Include District Summary** checkbox.
6. Click on **GO**. The **Distribution Status Report** opens in the "View Report" window.
7. Click on **Close** to close the "View Report" window.

8. Click on  **Close** to close the "Filter Report" window.

Distribution Inventory Report

This report, in PDF format, provides administrative users a detailed tag list filtered by site(s) and status(es). This report does not included tags that are archived.

1. Click on  **Sites**, located in the top navigation bar.
2. Click the **Please Select Site Report** drop-down menu, located above the blue grid header.
3. Select **Distribution Inventory Report** under the "--- PDF ---" menu subcategory. The "Filter Report" window opens.
4. Select all sites or specific sites by checking appropriate box(es) from the **Site(s)** drop-down menu.
5. Select tag status from the **Status** drop-down menu.
6. Click on  **GO**. The "Distribution Inventory Report" opens in the "View Report" window.
7. Click on  **Close** to close the "View Report" window.
8. Click on  **Close** to close the "Filter Report" window.

Fixed Assets Report

This report, in PDF format, provides administrative users a detailed purchase order(s) fixed asset list respective to filtered site(s). This report only lists tags from purchase orders and not room initialization or archived tags.

1. Click on  **Sites**, located in the top navigation bar.
2. Click the **Please Select Site Report** drop-down menu, located above the blue grid header.
3. Select **Fixed Assets Report** under the "--- PDF ---" menu subcategory. The "Filter Report" window opens.

4. Select all sites or specific sites by checking appropriate box(es) from the **Site(s)** drop-down menu.
5. Click on  **GO**. The "Fixed Assets Report" opens in the "View Report" window.
6. Click on  **Close** to close the "View Report" window.
7. Click on  **Close** to close the "Filter Report" window.

Site Listing Report

This report, in CSV format, provides "Site ID," "Site Name," "Region Name," "Contact," "Phone," "E-Mail," "Warehouse Site," "Designated Transfer Site," "Facility ID," "Notes," "Shipping Address," "Instructions for Shipping Address," "Billing Address," and "Instructions for Billing Address."

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

Charge Listing Report

This report, in CSV format, provides a listing of all assessed charges (satisfied or unsatisfied) across the district, filtered by "Staff" or "Student," "Issue Date Range," "Charge Type," and "Charge Issued." The report includes "Site ID," "Site Name," "Location Type," "ID," "Last Name," "First Name," "Middle Name," "Staff Type," "Grade," "Homeroom," "Product," "Tag," "Charge Type," "Description," "Charge Notes," "Issue Date," "Charge Amount," "Amount Paid" (combined total for all respective payments for the charge), "Amount Due," and "Satisfied Date."

1. Click on  **Sites**, located in the top navigation bar.
2. Click the **Please Select Site Report** drop-down menu, located above the blue grid header.

3. Select **Charge Listing** under the "--- Excel ---" menu subcategory. The "Charge Listing Filters" window opens.
4. Select the respective **Charges For** from the drop-down menu.
5. Select the **Issue Date Range** from the drop-down menu.
6. (Optional) Select the respective **Charge Type** from the drop-down menu.
7. (Optional) Select the **Charge Issued** from the drop-down menu.
8. If "Charge Issued" is selected, enter quantity in **Qty**.
9. Click on  **GO**.
10. If prompted "Do you want to open or save csv," click on **Open**. The "Charge Listing Report" opens within Microsoft Excel. If your browser does not prompt to open the file, check your downloads folder.
11. Click on  **Close** to close the "Charge Listing Filters" window.

Charge Activity Listing Report

This report, in CSV format, provides a listing of students/staff, their respective charges (satisfied or unsatisfied), and all charge payments (payment, void, or refund) respective to a site. The report includes "Site Name," "Location Type," "ID," "Last Name," "First Name," "Middle Name," "Staff Type," "Grade," "Homeroom," "Product, Tag," "Charge Type," "Description," "Charge Notes," "Issue Date," "Charge Amount," "Activity Date," "Activity Type," "Activity Amount," "Activity Notes," "Activity Recorded By," and "Satisfied Date."

1. Click on  **Sites**, located in the top navigation bar.
2. Click the **Please Select Site Report** drop-down menu, located above the blue grid header.
3. Select **Charge Activity Listing** under the "--- Excel ---" menu subcategory. The "Charge Activity Listing Filters" window opens.
4. Select the respective **Charges For** from the drop-down menu.
5. Select the **Activity Date Range** from the drop-down menu.
6. (Optional) Select the **Charge Type** from the drop-down menu.

7. Click on  **GO**.
8. If prompted "Do you want to open or save csv," click on **Open**. The "Charge Activity Listing Report" opens within Microsoft Excel. If your browser does not prompt to open the file, check your downloads folder.
9. Click on  **Close** to close the "Charge Activity Listing Filters" window.

Staff Inventory Status Report

This report, in CSV format, provides a detailed list of items issued to staff members.

1. Click on  **Sites**, located in the top navigation bar.
2. Click the **Please Select Site Report** drop-down menu, located above the blue grid header.
3. Select **Staff Inventory Status Report** under the "--- Excel ---" menu subcategory. The "Filter Report" window opens.
4. Select all sites or specific sites by checking appropriate box(es) from the **Site(s)** drop-down menu.
5. Select the respective **Staff Status** from the drop-down menu.
6. Select the respective **Tag Status** from the drop-down menu.
7. Click on  **GO**.
8. If prompted "Do you want to open or save csv," click on **Open**. The "Staff Inventory Status Report" opens within Microsoft Excel. If your browser does not prompt to open the file, check your downloads folder.
9. Click on  **Close** to close the "Filter Report" window.

Sent Receipts Report

This report, in CSV format, provides a list of receipts sent to students/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," "Student E-Mail," "Parent E-Mail," and "E-Mail."

1. Click on  **Sites**, located in the top navigation bar.
2. Click the **Please Select Site Report** drop-down menu, located above the blue grid header.
3. Select **Sent Receipts Report** under the "--- Excel ---" menu subcategory. The "Sent Receipt Report" window opens.
4. Select the respective **Sent Receipt For** from the drop-down menu.
5. Select the **Sent Receipt Date Range** from the drop-down menu.
6. Select the **Sent Receipt Type** from the drop-down menu.
7. Click on  **GO**.
8. If prompted "Do you want to open or save csv," click on **Open**. The "Sent Receipts Report" opens within Microsoft Excel. If your browser does not prompt to open the file, check your downloads folder.
9. Click on  **Close** to close the "Sent Receipts Report" window.

Site Transfer Summary Report

This report, in CSV format, provides administrative users a detailed list of transferred and received items by site.

1. Click on  **Sites**, located in the top navigation bar.
2. Click the **Please Select Site Report** drop-down menu, located above the blue grid header.
3. Select **Site Transfer Summary Report** under the "--- Excel ---" menu subcategory. The "Transfer Summary Report" window opens.
4. Select the respective **Date Range** from the drop-down menu.
5. Click on  **GO**.
6. If prompted "Do you want to open or save csv," click on **Open**. The "Site Transfer Summary Report" opens within Microsoft Excel. If your browser does not prompt to open the file, check your downloads folder.

7. Click on  **Close** to close the "Transfer Summary Report" window.

Note:

- If users are assigned to only certain departments, they will only be able to view the statistics for those departments.
- The Distribution Inventory Report does not include tags that are archived.
- The Fixed Asset Report only lists tags from Purchase Orders and not room initialization or archived tags.

Managing Sites

Sites is the Asset Management area which allows you to add the locations (sites) to which you will issue and account for items. Normally, a site will correspond to a physical address where a building or group of buildings that make up a campus or district administrative offices. A site is where we might find an asset during an audit. It is helpful to enter as much site related information into Asset Management as you have available.

	999	Admin Building	Valerie Rensi	9158675309	Admin/Dept Building	False	None
--	-----	----------------	---------------	------------	---------------------	-------	------

Details **Inventory**

<p>Site: Admin Building</p> <p>Site ID: 999</p> <p>Site Name: Admin Building</p> <p>Site Type: Admin/Dept Building</p> <p>Region: None</p> <p>Facility ID:</p> <p>Designated Transfer Site: True</p> <p>Warehouse: False</p>	<p>Shipping Address</p> <p>Address 1: 1111 Tin Street</p> <p>Address 2:</p> <p>City: Austin</p> <p>State: TX, Zip: 78623</p> <p>Instructions:</p> <p>Billing Address</p> <p>Address 1:</p> <p>Address 2:</p> <p>City:</p> <p>State: Zip:</p> <p>Instructions:</p>	<p>Primary Site Contact</p> <p>Name: Valerie Rensi</p> <p>Phone: 9158675309</p> <p>E-Mail: learning@hayessoft.com</p> <p>Primary Region Contact</p> <p>E-Mail:</p> <p>Notes:</p>
---	---	--

Add a Site

1. in the top navigation bar, click **Sites**.
2. Click **Add Record**.
3. Enter the **Site ID**, **Site Name**, and **Site Type** in the respective fields.
4. Enter additional information about the site in the remaining fields, if desired. Red fields are required.
5. Select/deselect the check box next to **Designated Transfer Site** and **Warehouse** to enable/disable those features. Once activated, a "Warehouse" cannot be deactivated.
6. Click **Add**.

Edit a Site

1. On the top navigation bar, click  **Sites**.
2. Filter for the respective site.
3. On the site's row, click  **Edit**.
4. Update the respective information. **Site ID** is not available to edit.
5. Select/deselect the check box next to **Active** to deactivate a site.
6. Click  **Update**.

Site Types

Site Types are general categories used to identify different kinds of sites within your district. Examples of Site Types include Elementary Campus, Middle School Campus, Print Services, and Administration. Site Types are very helpful when searching and reporting on assets in your district.

Add a Site Type

1. On the top navigation bar, click  **Sites**.
2. Under Management Quick Links, click **Site Types** to open the Manage Site Types window.
3. Click  **Add Record**.
4. Enter the **Site Type** and/or **Description** in the respective fields. Red fields are required.
5. Click  **Add**.
6. Click  **Close** to close Manage Site Types.

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.*

		Refresh
	o --- PDF ---	Price
	Product Catalog Report	
	--- Excel ---	
	Product Listing	670.00
	Inventory Aging By Product Type	380.00
	Inventory Quantity By Product Type	720.00
	Inventory Value By Product Type	600.00
	Missing Inventory Value By Product Type	1200.00
	Site Inventory Aging By Product Type	
	15 " Screen	22
		530.00

Catalog Reports Dropdown	
Product Catalog Report	<p>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.</p> <p>Filters available include Area, Other #2, Other #3 Projected Life, Notes and Allow Untagged.</p>
Product Listing	<p>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.</p>
Inventory Aging by Product Type	<p>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.</p>

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.

			2000106	Brother MFC-L2707DW	Brother	MFC-L2707DW	Printer	Toner: TN-760	12	200.00
--	--	--	---------	---------------------	---------	-------------	---------	---------------	----	--------

Details | **Inventory** | **Accessories**

Product: Brother MFC-L2707DW

Product Number: 2000106	Brother	Total Inventory: 12
Product Name: Brother MFC-L2707DW	Model End Of Life: MFCL2707DW - 08/31/2022	Total Available: 12
Manufacturer: Brother	Projected Life: 7	Total Value: \$2,400.00
Model: MFC-L2707DW	Other #1: Toner: TN-760	
Product Type: Printer	Other #2:	
Area: None	Other #3:	
SKU:	Suggested Price: \$200.00	
Notes:	Serial Required: True	
	Allow Untagged: False	



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.

	2000106	Brother MFC- L2707DW	Brother	MFC- L2707DW	Printer	Toner: TN-760	12	200.00																								
<p>Details Inventory Accessories</p> <p style="text-align: center;">Inventory by Site Refresh</p> <table border="1"> <thead> <tr> <th>Site ID</th> <th>Site Name</th> <th>Site Type</th> <th>Total Inventory</th> <th>In Use</th> <th>Available</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>W003</td> <td>Technology Warehouse</td> <td>Warehouse</td> <td>12</td> <td>0</td> <td>12</td> </tr> <tr> <td colspan="3" style="text-align: right;">Total:</td> <td>12</td> <td>Total: 0</td> <td>Total: 12</td> </tr> </tbody> </table> <p>Page size: 10 1 items in 1 pages</p>									Site ID	Site Name	Site Type	Total Inventory	In Use	Available	<input type="text"/>	W003	Technology Warehouse	Warehouse	12	0	12	Total:			12	Total: 0	Total: 12					
Site ID	Site Name	Site Type	Total Inventory	In Use	Available																											
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																											
W003	Technology Warehouse	Warehouse	12	0	12																											
Total:			12	Total: 0	Total: 12																											

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	<p>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.</p> <p>Location Type - includes Rooms, Staff, and Students.</p> <p>Detail Inventory - A detailed view of inventory counts by specific location and status.</p>

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.

			2000121	Dell Chromebook 11 (CB1C13)	Dell	CB1C13	Chromebook	450	280.00
--	--	--	---------	-----------------------------	------	--------	------------	-----	--------

Assigned Accessories

Assign Accessories

Name	Description	Price	Consumable	Units	Actions
Chromebook Charger	Chromebook Charger	40.00	No	1	

Page size: 10 1 items in 1 pages

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.

Product Catalog Table of Contents

"Product Catalog Management" allows districts to manage, and track in Asset Management tagged and untagged assets within the district.

The "Product Catalog" feature follows similar permissions, based on view and editing options, as the "Parts Catalog."

The screenshot shows the 'Product Catalog' interface for Learning Independent School District. The navigation menu on the left includes 'Asset Management', 'Training', 'Home', and 'Admin Tools' (Archive, Data Import, Initiate Site Audit, Issue to Staff, Issue to Students, Print Tags, Quick Collect, Status Import, Transfer History) and 'Management'. The main content area displays 'Training Inventory Statistics: All sites, All Product Types' with a bar chart and a summary table.

	Count	Value
Total Inventory	7,953	\$7,250,596.00
Available	3,824	\$2,151,279.00
In Use	3,863	\$4,899,985.00
Other	266	\$199,332.00

Running Catalog Reports

The **Catalog** 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.

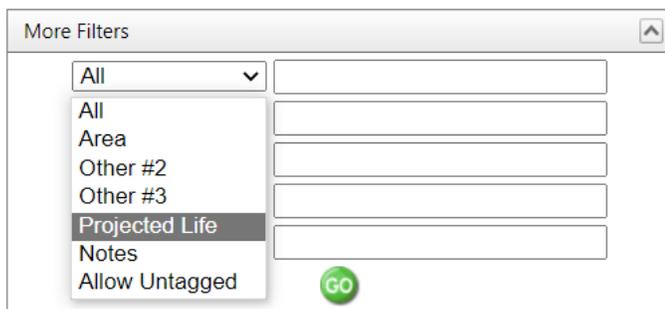
When in *Administrative View* the reports include all products in the **Catalog**. In *Site View* the reports include all products located at the current site. To return a subset of data, the user is required to apply a filter to the records in the grid prior to running the report.

Product Catalog Report

This report, in PDF format, provides a complete listing of products with product barcodes and images (if provided). Barcodes speed up the process of initializing items to a room.

1. Click on  **Catalog**, located in the top navigation bar.
2. Click on the **Please Select Catalog Report** drop-down menu, located above the blue grid header.
3. Select **Product Catalog Report** under the "--- PDF ---" menu subcategory. The "View Report" window opens.
4. If desired, select additional filters using the **More Filters** drop-down menu within the "View Report" window (optional).

View Report



To display only untagged products in the catalog report, select **Allow Untagged** in the filter drop-down menu, and enter "true" into the open text field.

5. Click on  **GO**. The **Product Catalog Report** opens.

Product Listing

This report, in XLS format, provides a complete detailed listing of products within Asset Management. Details include Product Number, Product Name, Manufacturer, Model, Product Type, Other #1, Other #2, Other #3, Price, Quantity, and Total Value.

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

Inventory Aging by Product Type

This administrative report, in CSV format, provides: Product Type, Location, Type, Quantity, and Age (calculated by the purchase date of the item).

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

Inventory Value by Product Type

This administrative report, in CSV format, provides a total value breakdown of Product Type quantities at each site.

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

Missing Inventory Value by Product Type

This administrative report, in CSV format, provides the total missing value by Product Type, Site, and Missing Counts.

1. Click on  **Catalog**, located in the top navigation bar.
2. Click on the **Please Select Catalog Report** drop-down menu, located above the blue grid header.
3. Select **Missing Inventory Value by Product Type** under the "--- Excel ---" menu subcategory.
Missing tags must be in a state of Reconciled to be included in the Missing Inventory Value by Product Type report.
4. Enter a search beginning date in the **Audit Start Date** field using the interactive calendar feature.
5. Enter a search ending date in the **Audit End Date** field using the interactive calendar feature.
6. Click on  **GO**.
7. When the message appears asking "Do you want to open or save **Missing Inventory Value by Product Type.xls**", click on **Open**. The **Inventory Aging by Product Type** report opens in Microsoft Excel. If your browser does not prompt to open the file, check your downloads folder.

Site Inventory Aging by Product

This administrative report, in CSV format, provides: Product Type, Site, Location, Type, Quantity, and Age (calculated by the purchase date of the item).

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

[Creating an Accessory for Products in the Catalog](#)

Accessories are optional items that may be issued along with the product when it is issued to a student or staff member. An example of an accessory for a laptop might be a power adaptor or a laptop messenger bag. Asset Management will automatically issue the accessory with the associated product and can be configured to automatically assess a charge to the student or staff member's account if the accessory is not returned during the collection process.

Note:

- Consumable – No or yes designation made at 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.

Add and Assign a New Accessory

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

Assign an Existing Accessory

1. Click on  **Catalog**, located in the top navigation bar.
2. Filter for and click on the product to add an accessory. The product row turns yellow.
3. Click on the **Accessories** tab.
4. Click on  **Assign Accessories**. The **Manage Accessories** window opens.
5. Click on  **Add Record**.
6. Filter for the respective accessory.
7. Verify the **Units** quantity (this reflects the quantity accessories issued per product). Edit the **Units** field, if necessary.
8. Click on  **Assign**.
9. Click on  **Close** to close the **Manage Accessories** window.

Mobile Site View

Mobile Site Overview

The Mobile Site View allows ease of use when accessing your Asset Management data using a smart/mobile device. When accessing the Asset Management login screen using your smart/mobile device's browser window, enable the Mobile Site View by clicking on **Mobile Site** (located beneath the Log On button).

Mobile Site Functionality

"Room Audits" are available in the Mobile Site View of Asset Management. An "Audit" allows a site to scan all tags in a room and quickly identify missing items, misplaced items, and where those misplaced items should be located.

Function	Description
Create New Audit	Allows a user to add an audit to this room
Back	Displays the previous Mobile Site screen viewed
Date	Displays the date the audit was created
Audit By	Displays the login name of the user who created the audit
Status	Status of the audit ("New," "In Progress," "Finalized," and "Closed")

Function	Description
Inventory	Displays the inventory count of the tags expected to be in the room
Audit Count	Displays the count of tags entered during the room audit
Tag	Displays the tag numbers identified in the respective room audit ("Expected" and "Misplaced")
Product	Name of the product
State	Displays the respective audit tag state ("Missing," "Misplaced," and "Verified")
Finalize	Ends and locks the respective audit from additional tag entries (also changes the audit status to "Finalized")
Log Off	Logs the user out of the Mobile Site View and returns them to the Asset Management login screen

Conduct Mobile Site Room Audit

"Room Audits" are available in the **Mobile Site View** of Asset Management. The Asset Management **Mobile Site View** allows ease of use when accessing your Asset Management data using a smart/mobile device. An "Audit" allows a site to scan all tags in a room and quickly identify missing items, misplaced items, items found in an unexpected location, and where those misplaced items should be located.

Log In to the Mobile Site View

1. Access your district's Asset Management login screen within your smart/mobile device's browser window.
2. Click on **Mobile Site** (located beneath the  **Log On** button).
3. Enter your Asset Management username and password.
4. Click on  **Log On**. Upon successful log on, your assigned site will be listed on the "Audit Inventory" screen.

Create a Mobile Site Room Audit

"Initializing" is the process used when entering items currently located in a room but not yet tagged/tracked in Asset Management (for example, a mounted ceiling projector that was purchased years ago). Additionally, this verifies the tag on the current audit.

This process requires a tag for each item initialized and is only available for audits in the status of "New" or "In Progress."

1. After logging in to the **Mobile Site View**, click on the respective site's **Name**.
2. Scroll down the page and click on the respective **room**. OR, using the **search** field at the top of the screen, enter the room number for the respective room and click on  **Verify**. The screen changes and displays all audits for the respective room and their respective audit status.
3. Click on  **Create a New Audit**. The new audit opens.
4. Scan/enter each tag number located in the respective room into the **Tag** field at the top of the screen.

- You can enter all tags physically located in the respective room, even if the product is not listed in the "Room Audit" window as an issued/expected product for that room. Asset Management identifies each tag as "Missing," "Misplaced," "Found," or "Verified" and allows the site administrator to take action tag by tag.

Back

Audit Inventory

Complete Scan

Site: **Learning Campus**
 Room: **600, Technology Storage**
 Inventory: **2078**
 Audit Count: **6**

Tag:
✓
↻

TAG VERIFIED

Initialize Room Inventory >

Room Inventory

Tag	Product	State
T28823	24" Acer V247Y LED Monitor	Missing

- If needed, click on Back **Back** to leave the audit prior to finalizing.
- Click on Complete Scan **Complete Scan** to end and lock the audit from additional tag entries. This changes the audit status from "In Progress" to "Finalized."

Continue an In Progress Audit

- After logging in to the **Mobile Site View**, click on the respective site's **Name**.
- Scroll down the page and click on the respective **room**. OR, using the **search** field at the top of the screen, enter the room number for the respective room and click

on  **Verify**. The screen changes and displays all audits for the respective room and their respective audit status.

3. Locate, by scrolling down the page, and click on the respective "In Progress" room audit.

Back

Audit Inventory

Site: **Learning Campus**
Room: **600, Technology Storage**
Inventory: **0**

Create New Audit >

Audit History

Date	Audit By	Status
02/24/23	Trainer3	In Progress
03/22/21	Trainer1	Closed

4. Scan/enter each tag number located in the respective room into the **Tag** field at the top of the screen.
 - You can enter all tags physically located in the respective room, even if the product is not listed in the "Room Audit" window as an issued/expected product for that room. Asset Management identifies each tag as "Missing," "Misplaced," or "Verified" and allows the site administrator to take action tag by tag.
5. If needed, click on Back **Back** to leave the audit prior to finalizing.
6. Click on Complete Scan **Complete Scan** to end and lock the audit from additional tag entries. This changes the audit status from "In Progress" to "Finalized."

Mobile App: Capture Data for Audit

"Room Audits" are available in the **Mobile Site View** of Asset Management. The Asset Management **Mobile Site View** allows ease of use when accessing your Asset Management data using a smart/mobile device. An "Audit" allows a site to scan all tags in a room and quickly identify missing items, misplaced items, and where those misplaced items should be located.

While performing audits with a mobile device, you may identify data not previously captured in Asset Management (such as an out-of-the-way room or an uncommon product). The **Mobile Site View** allows the capture of this missing data into Asset Management. The following features assist in performing efficient and comprehensive audits.

Add a Room

1. After logging in to the **Mobile Site View**, click on  **Verify** or the respective site's **Name**.
2. Click on  **Create New Room**, located at the top of the page.
3. Enter the room's details. Red fields are required information.
4. Click on  **Save Room**, located at the bottom of the page.

Initialize an Item to a Room

"Initializing" is the process used when entering items currently located in a room but not yet tagged/tracked in Asset Management (for example, a mounted ceiling projector that was purchased years ago). Additionally, this verifies the tag on the current audit.

This process requires a tag for each item initialized and is only available for audits in the status of "New" or "In Progress."

1. After logging in to the **Mobile Site View**, click on  **Verify** or the respective site's **Name**.
2. Locate and select the respective room. The screen changes and displays all audits for the respective room and their respective audit status.
3. Locate and select the respective audit.

4. Click on **Initialize Room Inventory >** **Initialize Room Inventory**.
5. Enter the product number representing the item being initialized into the **Product Number** field (products and product numbers are available in the "Catalog").
6. Click on **Next**. The screen refreshes with the product description and respective initializing fields.
7. Enter the item's details. Red fields are required information.
8. Click on **< Initialize Inventory and Verify on Audit** **Initialize Inventory and Verify on Audit**. The screen refreshes and displays the tag added to the audit (and Asset Management) with the "Tag Audit State" as "Verified."

Add a Product

"Products" are the items district-level administrators have entered into Asset Management. This creates an application-wide accessible product catalog from which tags are assigned.

"Product Number" is an auto-generated field. You have the option of entering your own existing product number or letting Asset Management assign the new product an auto-generated Asset Management product number. **Product Names** are limited to 90 characters.

This process requires administrator rights.

1. After logging in to the **Mobile Site View**, click on **Verify** or the respective site's **Name**.
2. Locate and select the respective room. The screen changes and displays all audits for the respective room and their respective audit status.
3. Locate and select the respective audit.
4. Click on **Initialize Room Inventory >** **Initialize Room Inventory**.
5. Click on **Create New Product >** **Create New Product**. The screen refreshes with the **Product Detail** fields.
6. Enter the product's details. Red fields are required information.

7. Click on **< Save Product** **Save Product**. The product is added to the district's product "Catalog." The screen refreshes with the product description and respective initializing fields.
8. Enter the item's details. Red fields are required information.
9. Click on **< Initialize Inventory and Verify on Audit** **Initialize Inventory and Verify on Audit**. The screen refreshes and displays the tag added to the audit (and Asset Management) with the "Tag Audit State" as "Verified."

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).

The screenshot shows the TIPWeb-IT interface. At the top, there are navigation tabs: Home, Catalog, **Purchasing**, Sites, Tags, and Audits. A search bar is present with the text 'Tag / Serial' and 'Search Tag or Serial Number'. Below the navigation, there are buttons for 'Add Record', 'Import Inventory', and 'Show Closed', along with a dropdown menu for 'Please Select Purchasing Report...' and a 'Refresh' button. The main area displays a table of purchase orders with columns for Order Number, Purchase Date, Vendor, Status, Est. Delivery Date, and Notes. One row is highlighted in yellow, showing Order Number 21-041501, Purchase Date 04/15/2021, Vendor Dell Marketing, LLC, and Status Open. Below this row, a detailed view is shown with tabs for 'Details', 'Products', and 'Attachments'. The 'Details' tab is active, displaying the following information:

- Purchase Order: 21-041501**
- Purchase Order #: 21-041501
- Vendor: Dell Marketing, LLC
- Funding Request #:
- State Funding:
- Federal Funding:
- Purchase Date: 04/15/2021
- Est. Delv. Date:
- Status: Open
- Notes:

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.

The screenshot displays the 'Purchase Inventory' section of the TIPWeb-IT Admin interface. At the top, there are navigation tabs for 'Details', 'Products', and 'Attachments'. Below the tabs is a table with the following columns: Product Number, Product Name, Funding Source, Account Code, Ordered, Received, Shipping, Tags Received, Status, and Actions. A single row is visible with the following data: Product Number: 2000112, Product Name: Dell Latitude 3510, Funding Source: 1300-Technology, Account Code: 86-55776-4355-20-003, Ordered: 11, Received: 11, Shipping: 11, Tags Received: 11, Status: Closed. Below the table, a 'Details' section provides further information: Purchase Price: \$685.53, Ordered Qty: 11, Shipping Qty: 11, Received Qty: 11, and Available Qty: 0. A sub-table shows 'Shipped To Site' information for Grayson Elementary and Jackson Elementary, with columns for Invoice Number, Invoice Date, Shipping, Received Tags, Status, and Actions. The Grayson Elementary row shows 6 shipped and 6 received tags, while the Jackson Elementary row shows 5 shipped and 5 received tags. The status for both is 'Closed'. Navigation controls for the table and details view are visible at the bottom of the screenshot.

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	<p>Functions allowing the district level administrator to affect each product's processing within the respective purchase order.</p> <ul style="list-style-type: none"> • 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.

Function	Definition
Specific Product Information	Displays the product's Details tab.
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.

Show Closed
 Please Select Purchasing Report...

Order Number	Purchase Date	Vendor	Status	Est. Delivery Date	Notes
21-041501	04/15/2021	Dell Marketing, LLC	Open		

Purchase Order Attachments

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
<p>Purchase Order Listing</p>	<p>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.</p>
<p>Product Line Listing Report</p>	<p>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.</p> <p>Filters include: "Show only outstanding tags to receive", "Tagging Overdue by" and "Purchase Date Range"</p>

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.

Product Line Listing Filter ×

Show Only Outstanding Tags to Receive:

Tagging Overdue By: Please Select Overdue Limit... ?

Purchase Date Range: Please Select Date Range...

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.

Recording a Purchase Order

Asset Management allows new items to be assigned to sites through **Purchasing** in the top navigation bar. This process allows you to record essential purchasing data (purchase order number, purchase date, vendor, funding source, FRN, and quantity).

A purchase order can be utilized by multiple sites to assign newly acquired items to those sites.

Notes:

- A purchase order will remain in the status of "Open" until the administrator changes the purchase order status to "Closed." Products can be added to an "Open" purchase order indefinitely.
- A purchase order can be closed without processing all the products within it. Existing products can still be edited, received from a vendor, and shipped/received. Changing to a status of "Closed" prevents the addition of products and the ability to edit purchase order details. Once closed, a purchase order can only be reopened by the administrative level.
- Districts with the "Departments" feature enabled will be asked to assign each product on the purchase order to a specific department. If the same product needs to be assigned to more than one department within a purchase order, the product must be added to the purchase order once per department.

Adding a Purchase Order

This process requires administrator-level credentials. Creating an Asset Management purchase order requires the products and vendors, respective to the purchase order, to exist in your Asset Management data.

Pro Tip: A printed product catalog will allow you to utilize a scanner during this process to identify and quickly scan the product number.

1. Click on  **Purchasing**, located in the top navigation bar.
2. Click on  **Add Record**.

3. Enter the purchase order details. Red fields are required information. The default status for a new purchase order is "Open."
4. Click on  **Add**.

Adding Products to a Purchase Order

1. Click on  **Purchasing**, located in the top navigation bar.
2. Filter the "Purchasing" grid to locate the respective purchase order.
3. Click on the respective purchase order's row. The grid expands.
4. In the **Products** tab, click on  **Add Record**.
5. Enter the product details. Red fields are required information.
6. Click on  **Add**.
7. To continue adding products, repeat steps 4 through 6.

Import Inventory to a Purchase Order

This process allows the administrative level to import purchase order details and issue products to the room, staff, or student(S) at a site(s).

1. Click on  **Purchasing**, located in the top navigation bar.
2. Click on  **Import Inventory**. The "Purchase Order Inventory Import Manager" window opens.
3. Click on **Browse** in the "Upload File" section to locate the respective file. Click on the file name.

Pro Tip: If your table has a header row, select **My table has headers** in the "Import Details" section. "Required Fields" specifies the data required for a successful upload.

4. Click on **Open** to add the file.
5. Click on **Import**.

6. Under "Settings," select the **Import To** location and **Active Sheet** from their respective drop-down menus.
7. Identify **Product Name** and/or **Product Number** from the respective column drop-down menus.
8. Click on **Detect Custom Fields**.
 - Custom fields will display in the "Required Fields" and "Optional Fields" of the "Import Details" section. If a custom field is required, it must be identified.
9. Under "Import Review," set all required fields from their respective drop-down menus.
10. Click on **Validate**. A success message appears.
 - If the file does not pass validation, information about what needs correction is provided.
11. Click on **Finish**. The "Confirm Import Window" opens.
12. Click **OK**.

Edit Purchase Order Details

Purchasing allows the editing of purchase orders and product-related details within a purchase order. Not all fields can be modified at all times. Edits allowed on a purchase order depend on the permissions of the user and the stage of the purchase (whether items have been received and/or tagged).

Edit Purchase Order Detail

Admins can modify portions of the purchase order detail, regardless of purchase order status.

1. Click on  **Purchasing**, located in the top navigation bar.
2. Filter the "Purchasing" grid to locate the respective purchase order.
3. Click on  **Edit**, located in the purchase order's row. The grid expands.



4. Update the respective purchase order information as desired. If changing the "Vendor," that vendor must be in the vendor table prior to editing the purchase order.
5. Click on  **Update**.

Edit Product Detail Information

Admins can edit the purchase price, purchase date, and funding information assigned to products on a purchase order. If the administrative level created and added the products to the purchase order, the site administrator does not have permission to edit those purchasing details.

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

2. Filter the "Purchasing" grid to locate the respective purchase order.
3. Click on the respective purchase order's row. The grid expands.
4. On the **Products** tab, locate the respective product.
5. Click on  **Edit**, located in the product's row.

	2000132	Meraki MR46 AP	2000-eRate	83-085-4655-20-004	33	33	33	33	Closed		
Product Number:	<input type="text" value="2000132"/>		Purchase Price:	<input type="text" value="\$1,265.89"/>	Ordered Quantity:	<input type="text" value="33"/>	Received Quantity:	<input type="text" value="33"/>			
	Meraki MR46 AP										
Funding Source:	<input type="text" value="2000-eRate"/>										
Account Code:	<input type="text" value="83-085-4655-20-004"/>										

6. Update the respective product information.
7. Click on  **Update**.

Edit a Product Number that Has Not Shipped

Admins can modify a product number on a purchase order that has no shipped items.

1. Click on  **Purchasing**, located in the top navigation bar.
2. Filter the "Purchasing" grid to locate the respective purchase order.
3. Click on the respective purchase order's row. The grid expands.
4. On the Products tab, locate the respective product.
5. Click on  **Edit**, located in the product's row.
6.  **Search** for the product number. The "Search Products" window opens.
7. Filter the records to locate the correct product and click **Select** in the products row.
8. Click on  **Update**.

Edit a Product Number that Has Shipped

Admins can modify a product number on a purchase order that has at least one item shipped.

1. Click on  **Purchasing**, located in the top navigation bar.
2. Filter the "Purchasing" grid to locate the respective purchase order.
3. Click on the respective purchase order's row. The grid expands.
4. On the **Products** tab, locate the respective product.
5. Click on  **Edit**, located in the product's row.
6. Click on  **Edit**, located next to the product number. The "Edit Product" window opens.

Edit Product ✕

 Select Product

 Custom Fields

 Confirmation

Current Product

Product Number: 2000107
Product Name: iPad Air 4th Gen
Manufacturer: Apple
Model: A2316
Product Type: Tablet
Model End of Life:

Select a New Product

Product Number:





Product Name:



Manage Custom Fields

7. In the "Select a New Product" section, enter the correct "Product Number" or  **Search** for the product number.
8. After entering the product number, click  **Next**. The "Product Name" populates.

Note: If you search for the product number, the "Product Name" auto-populates.

9. Verify that the "Product Name" is correct.

10. Click  **Manage Custom Fields**.
11. Resolve any custom field conflicts identified in the "Custom Fields" section.
12. Click  **Final Confirmation**.
13. In the "Confirmation" section, a  success or  failure icon appears next to any assigned "Custom Fields." *If there are conflicts, you will need to resolve the conflicts by assigning the custom fields of the "Current Product" to the custom fields of the "New Products."
9. Click  **GO**. The "Edit Confirmation" window opens.
10. Click **OK**.

Edit a Product's Ordered Quantity or Received Quantity

Admins can modify the "Quantity Ordered" and/or the "Received Quantity" for an "Open" product on a purchase order. Quantities can be modified unless the "Tags Received" quantity is greater than zero.

1. Click on  **Purchasing**, located in the top navigation bar.
2. Filter the "Purchasing" grid to locate the respective purchase order.
3. Click on the respective purchase order's row. The grid expands.
4. On the **Products** tab, locate the respective product.
5. Click on  **Edit**, located in the product's row.
6. Enter the new quantity.
7. Click on  **Update**.

Remove a Product from a Purchase Order

Admins can remove an "Open" product on a purchase order. Quantities can be modified unless the "Tags Received" quantity is greater than zero.

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

2. Filter the "Purchasing" grid to locate the respective purchase order.
3. Click on the respective purchase order's row. The grid expands.
4. On the **Products** tab, locate the respective product.
5. Click on  **Delete**, located in the product's row. The screen refreshes and the product is removed from the purchase order.

Associated Permissions

Administrative View: District Settings > User Role Settings > Site Admin
(applies to all "Site Admin" users)

Restrict from Associating Tags to Purchase Orders

User-level permissions: Purchasing > Admin User, Site Admin, Site User
(applies to each user individually)

View Access

Add/Edit

Note: To edit the Asset Condition, Custom Field, Due Date, Installation Info, Status, Purchase Date, Purchase Price, and/or Funding Source assigned to a specific tag with a "Source" of "Initial," use Bulk Edit.

Add New Product to Catalog from Purchasing

Asset Management allows administrators to add new products to the catalog through the Purchasing menu option on the top navigation bar. This process allows you to record essential product data (product number, product name, manufacturer, model, product type, area, SKU, model end of life, projected life, suggested price, serial required, allow untagged, active, notes).

Add a New Product to Catalog from a Purchase Order

1. On the top navigation bar, click  **Purchasing**.
2. Filter the Purchasing grid to locate the respective purchase order.
3. Click on the respective purchase order's row to expand the grid.
4. In the Products Tab, click  **Add Record**.
5. Click **Search** to search for the product number. The "Search Products" window opens.

Search Products
✕

 Add New Product  Refresh				
Product Number	Product Name	Manufacturer	Product Type	Quantity
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
▶ 2000041	19" ThinkVision L197	Lenovo	Monitor	Select
▶ 2000042	2 Seat Mod Taping Station	Proteam	Furniture	Select
▶ 2000119	2007 Blue Bird Bus (AA 76)	Blue Bird	Bus	Select

6. If the product is not in the catalog, click  **Add New Product**. The "Create New Product" window

opens.

Create New Product

Product Number:	2000134	Suggested Price:	\$0.00
Product Name:		Serial Required:	<input type="checkbox"/>
Manufacturer:		Allow Untagged:	<input type="checkbox"/> ?
Model:		Active:	<input checked="" type="checkbox"/>
Product Type:		Notes:	
Area:			
SKU:			
Model End of Life:			
Projected Life:			
Other #1:			
Other #2:			
Other #3:			

- The product number field is auto-populated. Red fields are required.
- Enter a unique product name.
- Next to the respective field drop-down menu, click  **Edit** to add manufacturers, product types, and areas.
- Enter the remaining product details.
- Click  **Save** to add the product to the catalog.

Reprint a Purchasing Ticket

After creating an Asset Management purchase order, adding the respective product(s) to the purchase order, and receiving the item(s) from a vendor, Asset Management allows you to ship those item(s) to a site or multiple sites. Products must be received before they can be assigned/shipped to sites.

The Purchasing Ticket can be used to quickly receive the items to the respective site and provide documentation that items were physically received on the site.

When applicable, purchasing tickets display additional information after a tag is received into a room within a site. This includes who received the tag to the room, when the tag was received, room the tag was received into, tag number assigned to the asset, and respective serial number of the asset.

Reprint a Purchasing Ticket – Admin View

This process allows the administrative level to receive items to a room located on the respective site, assign the status of the item (available or in use), assign the tag to the item, and record any required custom field data.

1. On the top navigation bar, click  **Purchasing**.
2. Filter the Purchasing grid to locate the respective purchase order.
3. Click on the respective purchase order's row. The grid expands.
4. In the Products tab, locate the respective product. In the Actions column, click  **Ship to Site**. The “Shipping Management” window opens.

Shipping Management ✕

Product Number: 2000111	Order Quantity: 10	Shipping Quantity: 10
Product Name: Lenovo IdeaPad 5	Received Quantity: 10	Available Quantity: 0

Site: 📍 🗑️

Invoice Number:

Invoice Date: 📅 🗑️

Quantity: 🗑️

Shipped To Site	Invoice Number	Invoice Date	Shipping Quantity	Received Tags	Status	Actions
 Learning M5			10	0	Open	🗑️ 📄 📅 🚫

⏪ ⏩ 1 ⏪ ⏩ Page size: 5 1 items in 1 pages

5. Locate the respective site. Click  **Process Print Ticket** to generate the Purchasing Ticket for this product as it was delivered to this site.
6. Once processed, the Process Print Ticket icon will update to  **Print Ticket**. Click the icon to generate the purchasing ticket in PDF format.

Reprint a Purchasing Ticket – Site View

This process allows the administrative level to receive items to a room located on the respective site, assign the status of the item (available or in use), assign the tag to the item, and record any required custom field data.

1. On the top navigation bar, click  **Purchasing**.
2. Filter the Purchasing grid to locate the respective purchase order.
3. Click on the respective purchase order's row. The grid expands.
4. On the Products tab, locate and click on the respective product with a Shipping quantity greater than zero. The grid expands.

2000107	iPad Air 4th Gen	1000-Carl Perkins	4756-978-0642-90-659	15	15	15	1	Open
Details								
Purchase Price: \$599.99			Ordered Qty: 15		Shipping Qty: 15			
			Received Qty: 15		Available Qty: 0			
Shipped To Site	Invoice Number	Invoice Date	Shipping	Received Tags	Status	Actions		
Learning Campus			5	1	In Transit			
 Page size: 10							1 items in 1 pages	

5. Under the Actions column, click  **Print Ticket** to generate the purchasing ticket in PDF format. If you expand the product and it displays No Records to Display (including no Print Ticket under the Actions column) and there is a Shipping quantity greater than zero, it means the items shipped by the district were not shipped to your site.

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.

Receive Vendor Purchases

After creating an Asset Management purchase order and adding the respective products to the purchase order, Asset Management allows you to document the receipt of those products when they arrive from the vendor. Products must be received before they can be assigned/shipped to sites.

Receive a Product From a Vendor

This process requires administrator level credentials. A purchase order must have been created with products assigned to it which are being received.

Hint: A printed product catalog will allow you to utilize a scanner during this process to identify and quickly scan the product number.

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

Note: A Purchase Order will close when the last item on the order is received. The user will receive a message upon receiving the last item asking if the purchase order should be Closed. Once closed, the user can select the Show Closed box on the purchase order page to view closed purchase orders.

Products can be added to an Open purchase order indefinitely. A purchase order can be closed without processing all the products within it. This does not affect editing, receiving from a vendor, shipping, and/or receiving for a site for existing products in the closed purchase order. It merely locks the purchase order, preventing the addition of additional products and removing the ability to edit the details of the purchase order.

Once closed, a purchase order can only be reopened by the administrative level.

[Adding and Editing a Vendor](#)

A vendor is an individual or a company who provides/supplies products to your district (similar to a supplier). This process requires administrative level or site administrator level credentials.

Adding a Vendor

1. Click on **Vendors** under "Management Quick Links." The "Manage Vendors" window opens.
2. Click on  **Add Record**.
3. Enter the name of the vendor in the **Vendor Name** field.
4. Enter the account number of the vendor in the **Account Number** field.
5. Click on  **Add**.
6. Click on  **Close** to close the "Manage Manufacturers" window.

Editing a Vendor

1. Click on **Vendors** under "Management Quick Links." The "Manage Vendors" window opens.
2. Locate the **Vendor**.

If the vendor is not visible on the grid, search for the vendor using the search window located below the blue grid header under "Manufacturer." Search by Vendor Name or Account Number.

Vendor	Account Number
<input type="text"/>	<input type="text"/>

3. Click on  **Edit** next to the vendor's name. The grid expands.
4. Update the information in the necessary fields: **Vendor Name** and **Account Number**.

5. Click on  **Update**.
6. Click on  **Close** to close the "Manage Manufacturers" window.

Adding and Editing a Funding Source

Funding Sources are the identifiable sources that represent a sum of money or other financial resources used to purchase an item. When adding a product to an existing purchase order, Asset Management requires a funding source be selected. The "Funding Sources" screen allows a district-level administrative user to add to/edit the list of funding sources.

Note: A funding source can only be deleted if it has not been assigned to a tag. To edit a Funding Source assigned to a specific tag, there are two administrator options:

1. For tags with an Inventory Type of "Initial," use Bulk Edit.
2. For tags with an Inventory Type of "Order," use Edit Purchase Order Details.

Add a Funding Source

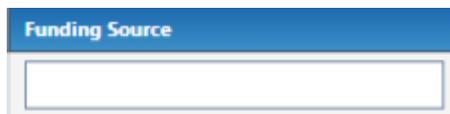
1. Click on **Funding Sources** under **Management** Quick Links. The **Manage Funding Sources** window opens.
2. Click on  **Add Record**.
3. Enter the funding source name in the **Funding Source** field.
4. Enter the funding source description in the **Description** field.
5. (Optional) Enter/search for the users allowed to submit tags with this funding source in a transfer in the **Transferring Restricted To** field.
6. Enter user e-mail addresses in **Status Notifications Sent To** field. A nightly notification will be sent to the specified e-mails if at least one tag with this funding source is put into an end-of-life status.

7. Click on  **Add**.
8. Click on  **Close** to close the "Manage Funding Sources" window.

Searching for a Funding Source

Because there is a possibility of having numerous funding sources, Asset Management provides a search function to locate the respective funding source.

1. Click on **Funding Sources** under "Management Quick Links." The "Manage Funding Sources" window opens.
2. Enter the respective funding source in the search box under Funding Source in the blue grid header.



The image shows a blue header bar with the text "Funding Source" in white. Below the header is a white search input box with a thin grey border.

3. Press **Enter**. The screen refreshes and displays the matching funding source.
4. Click on  **Close** to close the "Manage Funding Sources" window.

Edit a Funding Source

1. Click on **Funding Source** under "Management Quick Links." The "Manage Funding Sources" window opens.
2. Locate the **Funding Source**.

If the funding source is not visible on the grid, search for the funding source using the search box under "Funding Source" in the blue grid header.



The image shows a blue header bar with the text "Funding Source" in white. Below the header is a white search input box with a thin grey border.

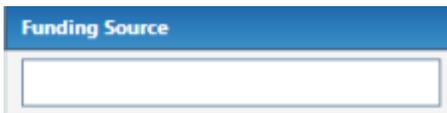
3. Click on  **Edit** next to the funding source's name. The grid expands.

4. Update the information in the necessary fields: **Funding Source**, **Description**, **Transferring Restricted To**, **Status Notifications Sent To**, and **Transfer Notifications Sent To**.
5. Click on  **Update**.
6. Click on  **Close** to close the "Manage Funding Source" window.

Delete a Funding Source

1. Click on **Funding Source** under "Management Quick Links." The "Manage Manufacturers" window opens.
2. Locate the **Funding Source**.

If the funding source is not visible on the grid, search for the funding source using the search box under Funding Source in the blue grid header.



3. Click on  **Delete** under the **Actions** column.

If the funding source is assigned to any products, the user will receive a tooltip, "Funding Source is currently in use," and will not be able to delete.

4. Click on  **Save**.
5. Click on  **Close** to close the "Manage Funding Source" window.

Restrict Transfer of Tags per Funding Source

Certain funding sources (e-Rate) require assigned users for site-to-site transfers within a district. If a restricted funding source tag is added to a transfer, the transfer and ALL tags within it will not be eligible to be "Submitted" and/or placed "In Transit" unless there is an assigned user to the restricted funding source.

Warning: Assigned users in this process, with multiple assigned sites (User Management), may receive notification for each assigned site regarding transfers with restricted funding source tags.

1. Click on **Funding Sources** under "Management Quick Links." The "Manage Funding Sources" window opens.
2. Search for the respective **Funding Source**.
3. Click on  **Edit** next to the funding source's name. The grid expands.
4. Enter the respective Asset Management username(s) into the **Transferring Restricted To** field.
5. Click on  **Update**.
6. Click on  **Close** to close the "Manage Funding Sources" window.

E-mail Notifications

The "E-mail Notifications Sent To" feature allows administrators to input e-mail addresses for restricted funding sources. A nightly notification is sent to the respective e-mails if (1) at least one tag with the restricted funding source is submitted on a transfer for the day or (2) a restricted funding source is placed into an end-of-life status. Include a semi-colon (;) after each entry if there are multiple e-mail addresses.

1. Click on **Funding Sources** under "Management Quick Links." The "Manage Funding Sources" window opens.
2. Search for the respective **Funding Source**.
3. Click on  **Edit** next to the funding source's name. The grid expands.
4. Enter the respective e-mail addresses into the **Status Notifications Sent To** field.
5. Click on  **Update**.
6. Click on  **Close** to close the "Manage Funding Sources" window.

Ship Product to a Site

After creating an Asset Management purchase order, adding the respective product(s) to the purchase order, and receiving the item(s) from a vendor, Asset Management allows you to ship those item(s) to a site or multiple sites. Products must be received before they can be assigned/shipped to sites.

Note: A purchase order will remain in the status of "Open" until the district-level administrator changes the purchase order status to "Closed." Products can be added to an "Open" purchase order indefinitely.

Ship Product(s) to a Site

This process requires administrator-level credentials. Creating an Asset Management purchase order requires the products and vendors, respective to the purchase order, to pre-exist in your Asset Management data.

Pro Tip: A printed product catalog will allow you to utilize a scanner during this process to identify and quickly scan the product number.

1. Click on  **Purchasing**, located in the top navigation bar.
2. Filter the "Purchasing" grid to locate the respective purchase order.
3. Click on the respective purchase order's row. The grid expands.
4. In the **Products** tab, locate the respective product to ship.
5. Click on  **Ship to Site**. The "Shipping Management" window opens.
6. Enter the **Site ID** into the **Site** field (typing in the number requires clicking on  **Next**). OR, click on  **Search** to select the **Site ID**.
7. Enter the invoice number in the **Invoice Number** field.
8. Click on  **Open the calendar popup** to set the **Invoice Date**.
9. Enter the quantity to ship in the **Quantity** field.
10. Click on  **Save**. The "Shipping Management" grid updates.
11. To enter shipping quantities for other sites respective to this purchase order's selected product, repeat steps 6 through 10.

12. Click on  **Process Print Ticket** on the respective shipment's row. The shipping status changes to "In Transit."
13. Click on  **Print Ticket** to generate the PDF.

Closing Out a Purchase Order

A purchase order can be closed without processing all the products within it. Existing products can still be edited, received from a vendor, and shipped/received. Changing to a status of "Closed" prevents the addition of products and the ability to edit purchase order details.

Once closed, a purchase order can only be reopened by the administrative level.

"Invoice Number" and "Invoice Date" are optional fields. When the information is saved in the "Shipping Management" window, any data in those two fields will be associated with assets scanned as part of the purchase order. The invoice number and invoice date will show up on the funding information for the tags and on the purchasing ticket.

Invoice numbers can be edited at any time through the "Edit" function.

Receive Items for a Site in Admin View

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

Receive Items for a Site via Scanning Tags

This process allows the administrative level user to receive items to a room located on the respective site, assign the status of the item (available or in use), assign the tag to the item, and record any required custom field data.

The screenshot displays the TIPWeb-IT Admin View interface. At the top, there is a navigation bar with icons for Home, Catalog, Purchasing, Sites, Tags, Audits, and a search box for 'Tag / Serial'. Below the navigation bar, there is a 'Purchasing' grid with columns for Order Number, Purchase Date, Vendor, Status, Est. Delivery Date, and Notes. A row for order number 23-010301 is selected, showing a purchase date of 01/02/2023, vendor 'Lenovo', and status 'Open'. Below this row, the 'Purchase Inventory' grid is expanded, showing columns for Product Number, Product Name, Funding Source, Account Code, Ordered, Received, Shipping, Tags Received, Status, and Actions. A row for product number 2000111 is visible, showing a product name of 'Lenovo IdeaPad 5', funding source '1300-Technology', account code '1526-3568-040-11-000', and a status of 'Open'. The interface also includes an 'Add Record' button and a 'Refresh' button.

1. Click on **Purchasing**, located in the top navigation bar.
2. Filter the "Purchasing" grid to locate the respective purchase order.
3. Click on the respective purchase order row. The grid expands.
4. In the **Products** tab, enter/scan the product number for the respective product to receive.
5. Click on **Ship to Site**. The "Shipping Management" window opens.
6. Click on **Scan Tags** on the respective "In Transit" shipment row. The "Receive By Tag" window opens.
7. Select the room for the product from the **Room** drop-down menu.
8. Select the status of the product from the **Status** drop-down menu.

- **Available:** Assigns this item to this room for the purpose of later issuing it to an individual or another room
- **In Use:** Assigns this item to this room and designates it is not available to issue to another room, staff, or student

9. Enter/scan the item's tag into the **Tag** field.

10. If applicable, continue to scan all tags until the entire quantity of this product has been received (the "Room and Status" field will default to the last user-selected settings).

11. Once all items have been received, a success message displays to communicate receiving for this product is complete. Click  **Done** to close the "Receive By Tag" window.

12. If applicable, continue to receive items for all respective "In Transit" shipments respective to this purchase order following steps 6 through 11.

13. Click  **Done** to close the "Shipping Management" window.

Receive By Tag
✕

 Done

Product: 2000077
PowerShot SD 1300 IS

Room:

Status:

Tag:

Serial:

Tag	Serial	Location	Status	Action
T65359	HNGE9874Gn	Room: 100	Available	



Page size:

1 items in 1 pages

Note:

When applicable, purchasing tickets  display additional information after a tag is received into a room within a site. This includes who received the tag to the room, when the tag was received, the room the tag was received into, the tag number assigned to the asset, and the respective serial number of the asset.

Receive Items for a Site via Importing Tags

Prepare "Receive By Tag Import" data template

The "Receive By Tag" import allows the user to receive items to a room/student/staff located on the respective site by importing an XLSX or CSV file into Asset Management. If the product type has associated Custom Fields, the custom field data may also be included in the import. You are required to include any custom field that is configured as "required" in the application.

Template Requirements:

You will need a separate template (or worksheet in a workbook) for each location type in which assets are to be placed.

- To import to a location of Room, the file must contain the minimum: Tag#, Serial# (if required for product type), Room#, and Status.
- To import to a location of Student, the file must contain the minimum: Tag#, Serial# (if required for product type), and Student ID.
- To import to a location of Staff, the file must contain the minimum: Tag#, Serial# (if required for product type), and Staff ID.
- Required fields mentioned above should have a cell format of "general"
- Custom Fields should have a cell format that matches that field's data type in the application

See the video below to help create your data template.

Receive Items for a Site via "Receive by Tag" Import Tool

The process of receiving assets using the "Receive by Tag" import allows administrative-level users to receive items to a room, student, or staff member by importing an XLSX or CSV file into Asset Management.

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

Receive By Tag Import Manager ✕

Upload File

Select file to import (.xls, .xlsx)

Browse

Current File: TagImportLMS_23_010301.xlsx

My table has headers Re-Import

Import Details

Import Type: Receive By Tag
Required Fields: Room, Serial, Status, Tag
Optional Fields: Image Date

Settings

Import To: Room

Active Sheet: RoomDistAdmin

[Set all Empty Columns to Do Not Import](#)

Validation

Validate
Finish

Import Preview

Make sure the columns in your file match the TIPWeb-IT field names.

Room	Status	Serial	Tag	Image Date	
TechStorage	Available	AABBCCDD	T481100	12/30/2022	
TechStorage	Available	AABBCCDE	T481101	12/30/2022	

1. Click on **Purchasing**, located in the top navigation bar.
2. Filter the "Purchasing" grid to locate the respective purchase order.
3. Click on the respective purchase order row. The grid expands.
4. In the **Products** tab, enter/scan the respective product to receive.
5. Click on **Ship to Site**. The "Shipping Management" window opens.
6. Click on **Import Tags** in the respective "In Transit" shipment row. The "Receive By Tag Import Manager" window opens.
7. Review the "Import Details" box to verify the respective file contains data for each of the required fields and/or optional fields.
8. Browse and select the respective file by clicking on **Browse** (located in the "Upload File" box).
9. If the respective file does not contain a header row, deselect the **My Table Has Headers** box.
10. Click on **Import**. The window refreshes with the file's data.

11. From the "Settings" box, click the **down arrow** and select the type of location to which the tags will be imported: Room, Staff, Student.
12. If no headers exist on the spreadsheet, assign the type of data located in each column to the respective product's required and/or optional fields, using the drop-down menus located in the blue grid header.
13. Click on **Validate**. This reviews the file for possible issues and reports those findings in the "Validation" box.
14. When the validation message displays "Validation Successful!" click on **Finish**. The "Confirm Import" window appears.
15. The message "You are about to finish your import. This action cannot be undone. Are you sure you want to finish your import?" displays. Click **OK**. The import brings in the tags, closes the "Receive by Tag Import Manager" window, returns you to the "Shipping Management" window, and updates the respective site's "Received Tags" count and status.
16. Click  **Done** to close the "Shipping Management" window.

Import Process Videos

Receiving Items to a Site in Site View

Asset Management allows newly acquired items to be assigned to your sites through the "Purchasing" grid. Receiving items to your site requires one or more products within a purchase order to be in the status of "In Transit." The admin will send a pick ticket with the new items.

Using the purchasing ticket, Asset Management allows site users to receive items to a room located on the respective site, assign the status of the item ("Available" or "In Use"), assign the tag to the item, and record any required admin-created custom field data (such as serial number, image date, etc.).

Note:

- If you do not have a purchasing ticket, re-print the purchasing ticket by clicking on  **Pick Ticket** (located in the same "Actions" column as  **Scan Tag into Inventory**).
- An admin-created purchase order will remain in the status of "Open" until all items have been received or the administrator changes the purchase order status to "Closed." A site-created purchase order will remain in the status of "Open" until all tags have been received to rooms or until the administrator changes the purchase order status to "Closed."
- An admin-created purchase order can be closed without processing all products within it. This does not impact editing, receiving from a vendor, shipping, and/or receiving for a site for existing products in the closed purchase order. It merely locks the purchase order, preventing the addition of products and removing the ability to edit the details of the purchase order.
- Once closed, a purchase order must be reopened by the administrator.

Receive Items from a Purchase Order via Scanning Tags

1. Click on  **Purchasing**, located in the top navigation bar.
2. Enter/scan the purchasing ticket barcode for the purchase order number in the **Order Number** field.
3. Click on the respective purchase order's row. The grid expands to show the **Details**, **Products**, and **Attachments** tabs.

4. Click on the **Products** tab.
5. Enter/scan the product number for the respective product to receive.
6. Click on the respective product's row. The grid expands to show the **Details** area.
7. Click on  **Scan Tag into Inventory** in the "Actions" column in the respective "In Transit" shipment row. The "Receive By Tag" window opens.
8. Select the room for the product from the **Room** drop-down menu.
9. Select the status of the product from the **Status** drop-down menu.
 - **Available** - Assigns this item to this room for the purpose of later issuing it to an individual or another room
 - **In Use** - Assigns this item to this room and designates it is not available to issue to another room, staff, or student
10. Enter/scan the item's tag into the **Tag** field.
11. Enter/scan any extra data into the respective field(s). Red fields are required information.
12. Continue to scan all tags until the entire quantity of this product has been received (the "Room and Status" field will default to last user selected settings), if applicable.
 - Once all items have been received, a success message displays to communicate receiving for this product is complete.
13. Click  **Done** to close the "Receive By Tag" window.
14. Continue to receive items for all respective "In Transit" shipments respective to this purchase order following steps 7 through 13, if applicable.

Receive Items from a Purchase Order via Importing Tags

This process allows the site level to receive items to a room located on the respective site by importing an XLS or XLSX file into Asset Management. The file must contain the data for required fields (respective to the product and product type), as this process also requires the

assignment the status of the item ("Available" or "In Use"), assignment of the tag to the item, and assignment of any required custom field data.

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

1. Click on  **Purchasing**, located in the top navigation bar.
2. Filter for the respective purchase order.
3. Click on the respective purchase order's row. The grid expands to show the **Details**, **Products**, and **Attachments** tabs.
4. Click on the **Products** tab.
5. Enter/scan the product number for the respective product to receive.
6. Click on the respective product's row. The grid expands to show the **Details** area.
7. Click on  **Import Tags** in the "Actions" column. The "Receive By Tag Import Manager" window opens.
8. Review the "Import Details" box to verify the respective file contains data for each of the import type and/or required fields.
9. Click on **Browse** to locate the respective file to import. Click on the file name.
10. Click on **Open** to add the file.
11. If the respective file does not contain a header row, deselect **My Table Has Headers**.
12. Click on **Import**. The window refreshes with the file's data.
13. From the "Settings" box, click the **down arrow** and select the type of location to which the tags will be imported (Room, Staff, or Student).
14. If no headers exist on the spreadsheet, assign the type of data located in each column to the respective product's required and/or optional fields, using the drop-down menus located in the blue grid header.
15. Click on **Validate**. This reviews the file for possible issues and reports those findings in the "Validation" box.

16. When the validation message displays "Validation Successful!" click on **Finish**. The "Confirm Import" window opens.
17. The message "You are about to finish your import. This action cannot be undone. Are you sure you want to finish your import?" displays. Click **OK**.
18. The import brings in the tags, closes the "Receive by Tag Import Manager" window, returns you to the "Purchasing" page, and updates the respective product's "Received Tags" count.

Receive Assets Using the PO Inventory Import

AM allows newly acquired items to be assigned to your sites through the Purchasing page. A district can receive assets to one or more purchase orders via the "Purchase Order Import" process.

Prepare a Data Template for your Purchase Order Import

You will need a separate template (or worksheet within a workbook) for each location type in which assets are to be placed.

	Field Considerations
	Products defined in the catalog as "serial required" will require a value in the "Serial #" field.
	Custom fields defined as "Required" in AM will be required to have data in the template.
	Look up the product number in your catalog and add it to your import file.
	Required fields should have a cell format of "General."
	The "Invoice Date" field is an optional field and should have a cell format of "date."
	Custom fields should have a cell format that matches that field's format in Asset Management.

The following items are *required* within Asset Management prior to import:

- Purchase order(s) have been recorded in the purchasing grid by adding the required fields (PO#, Vendor, and PO Date), at minimum
- Product(s) are defined in the Catalog
- Funding source(s) exist in the "Funding Sources" table

Use the Purchase Order Inventory Import Tool

The "Purchase Order Inventory Import" is helpful when assets are added to your database after they are set up or installed, or you have a very large order of assets that come pre-tagged by the vendor.

1. Click on  **Purchasing**, located in the top navigation bar.
2. Verify that the purchase order(s) to which you are importing assets have been defined.
3. Click on  **Import Inventory**.
4. Review the "Import Details" box to verify the desired file contains data for each of the required fields and/or optional fields.
5. Click **Browse** to select the desired file to import.
6. If the desired file does not contain a header row, uncheck the box labeled **My Table Has Headers**.
7. Click on **Import** to refresh the window with the file's data.
8. Select the **Location Type** to which you are importing: room, student, or staff. You must have a separate file or worksheet for each type and can only import to one location type at a time for each site.
9. For workbooks with multiple worksheets, you will also be prompted to select the active worksheet.
10. In the **Import Review** section, identify the product name and/or product number from their respective column drop down menus.

11. Click on **Detect Custom Fields**. Custom fields will display in the "Required Fields" line and "Optional Fields" line of the "Import Details" section. If a custom field is required, it must be identified.
12. In the "Import Preview" area, verify that each column in your spreadsheet is mapped to the corresponding field in Asset Management. Be sure to select **Do Not Import** for any empty column or data that is not related to the import.
13. Click on **Validate** to review the file for possible issues.
14. Once the validation is successful, click on **Finish**.

Preparing Data for the Receive By Tag Import

The **Receive By Tag** import is completed during the recording of a Purchase Order in the Purchasing Grid at the Product level. It allows the user to receive items to a room/student/staff located on the respective site by importing an XLS or XLSX file into Asset Management.

Template Requirements

You will need a separate template for each location type in which assets are to be placed.

- To import to a **Room**, the file must contain the minimum: **Tag#**, **Serial#** (if required for product type), **Room#**, and **Status**.
- To import to a **Student**, the file must contain the minimum: **Tag#**, **Serial#** (if required for product type), and **Student ID**.
- To import to a **Staff** member, the file must contain the minimum: **Tag#**, **Serial#** (if required for product type), and **Staff ID**.

If the product type has associated Custom Fields, the custom field data may also be included in the import.

Add Attachment to Purchase Order

This article describes how to add attachments to purchase orders.

Asset Management allows for attachments of up to 1 MB in size to be attached to a purchase order.

1. Click on  **Purchasing**, located in the top navigation bar.
2. Filter the "Purchasing" grid to locate the respective purchase order.
3. Click on the respective purchase order's row. The grid expands to show the Details, Products, and Attachments tabs.
4. Click on the **Attachments** tab.
5. Click on  **Add Attachment**. The "Add Attachment" window open.

Add Attachment

Attachment:	<input type="text"/>	<input type="button" value="Browse"/>
-------------	----------------------	---------------------------------------

Notes:	<div style="border: 1px solid #ccc; height: 60px;"></div>
--------	---

Maximum Upload File Size: 1MB

6. Click on **Browse** to locate the respective file. Click on the file name.
7. Click on **Open** to add the file.
8. (Optional) Enter any respective notes regarding the attachments in the Notes field.
9. Click on  **Save**.

Click  **Delete**, as needed, to delete attachments from purchase order items.

[Troubleshooting Validation Errors During Import](#)

Errors when importing a purchase order template can be caused by numerous issues in the data of the import file. The follow are common errors and their solutions.

A Line Item Doesn't Exist In the Import

Solution

Check for blank data at the ends of the import preview. Blank data could be related to phantom data in the spreadsheet. Blank data should be deleted from the spreadsheet and re-imported.

Invalid Product Number/Name

Solution

Check that the product number exists and is active in the catalog. Check that the product name exists and is written exactly as it exists in the catalog.

It is a best practice to use product number versus product name as it reduces room for human error and typos.

Invalid Room Number

Solution

Check that both Site ID and Room exists in the site importing the data. The import file must include the Site ID – not the Site Name – and the room must exist on the import file exactly how it is written in Asset Management.

Invalid Order Number

Solution

Check that the user has created the Purchase Order shell in purchasing. The Purchase Order shell must exist in Asset Management prior to being uploaded.