



User Name:

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## Add Asset

Welcome to your new asset tracking system.

# Asset Tracking System

## Phase 1

- **Navigation**
- Searching for Assets
- Individual Asset Screen
- Attribute Management
- Creating reports

Home

Search

Management

Custom List

Create Report

Settings



**Add Asset**

This is the application navigation bar.  
This is where you would look to manage your assets.  
Let's take a look at each button....



## Add Asset

Home.

The home page is populated with a set of common management tasks. You start at home and you can return to home at any time to access these options.

Category:

Subcategory:

Brand:

Location:

Status:

Contact:

## Search.

If you know which assets you want to manage, start here.

Enter the ID number if you know it or select attributes from the dropdown menus if you don't.

Click Search.

ID	91
Description	Comcast-Philadelphia
Company	Comcast
Address 1	One Comcast Center
Address 2	1701 JFK Blvd
City	Philadelphia
State	PA
Zip	19101
<u>Edit</u> <u>Delete</u> <u>New</u>	
... <u>82</u> <u>83</u> <u>84</u> <u>85</u> <u>86</u> <u>87</u> <u>88</u> <u>89</u> <u>90</u> <u>91</u>	

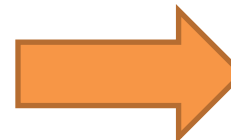
- Model
- Brand
- Category
- Location
- Status

What do we mean by management?

Perform an **action** to an **attribute**....

**Actions:**

- Add
- Update
- Delete



**Attributes:**

- Model
- Brand
- Category
- Location
- Status

Management

This is where you manage details of attributes that are associated with assets.

ID	91
Description	Comcast-Philadelphia
Company	Comcast
Address 1	One Comcast Center
Address 2	1701 JFK Blvd
City	Philadelphia
State	PA
Zip	19101
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">New</a>	
... <a href="#">82</a> <a href="#">83</a> <a href="#">84</a> <a href="#">85</a> <a href="#">86</a> <a href="#">87</a> <a href="#">88</a> <a href="#">89</a> <a href="#">90</a> <a href="#">91</a>	

Model  
Brand  
Category  
Location  
Status

When would I use this?

Let's say you have a number of various assets assigned to a location like Comcast and they decide to move their office to new building. You have two options:

- (1) You could select all the assets at that location, create a new location, and assign the assets to that location OR
- (2) you can navigate to Management → Location, select the existing Comcast location and update it to reflect the new information.

Management → Location

<u>Category</u>	<u>Brand</u>	<u>Subcategory</u>	<u>Item #</u>	<u>Location</u>	<u>Contact</u>	<u>Status</u>
<a href="#">Select</a> Server	Compaq	ML330 Servers	1	Sabre45	Smith	Missing
<a href="#">Select</a> Desktop	Compaq	C900 Desktops	2	Sabre4	Alba	Unreliable
<a href="#">Select</a> Server	Compaq	ML370 G3 Servers	3	Sabre1	Pitt	Unreliable
<a href="#">Select</a> Notebook	Compaq	N1000c Notebooks	4	Sabre84	Jolie	Broken
<a href="#">Select</a> Desktop	Dell	Dimension 1300	5	Sabre50	Alba	Unreliable
<a href="#">Select</a> Desktop	Compaq	PIII 1.0GHz thru 1.3GHz (Slim) Desktops	6	Sabre66	Smith	Goodie
<a href="#">Select</a> Notebook	Compaq	M700 Notebooks	7	Sabre56	Jolie	Goodie
<a href="#">Select</a> Notebook	Compaq	Notebook 100 Notebooks	8	Sabre71	Smith	Broken
<a href="#">Select</a> Server	Dell	PowerEdge Server 1800	9	Sabre82	Smith	Broken
<a href="#">Select</a> Server	Dell	PowerApp Appliance Server 150	10	Sabre78	Alba	Broken
<a href="#">Select</a> PDA	Compaq	H3650 Pocket PC PDA	11	Sabre84	Smith	Goodie
<a href="#">Select</a> Desktop	Compaq	CDTV 528 Desktops	12	Sabre34	Pitt	Broken
<a href="#">Select</a> Desktop	Compaq	EZ2700 Desktops	13	Sabre83	Smith	Damaged
<a href="#">Select</a> PDA	Compaq	H3900 PDA	14	Sabre1	Jolie	Goodie

### Custom List.

This is an option to select multiple assets and to add them to a custom list. This option will help facilitate bulk transactions and is fundamental in bar code scanning support.

Category	Brand	Sub-category	Product ID	Status	Description
Desktop	Compaq	C 900 Desktop	1	Good	Good condition
			3	Broken	Drop off of second floor on concret side walk
			5	Missing	Lost during shipment to N York site
			234	Good	Good condition
			235	Damaged	Chip case, left side
			134	Good	Good condition
PDA	Dell	H365 Pocket Pc PDA	321	Good	Good condition
			222	Damaged	Cracked Screen
			125	Broken	Dropped in a fish tank
			7	Good	Good condition
			9	Good	Good condition
			45	Missing	Stollen from bag at airport
Notebook	Compaq	N10000c Notebook	58	Good	Good condition
			21	Good	Good condition
			2	Broken	"M" and "T" keys are broken
			88	Good	Good condition

By Brand

By Category

By Model

By User

By Location

By Status

### Create Report.

Want to review assets? Reports will display assets grouped by different attributes. Additionally, export the information to Excel for more manipulation and printing options.

Home

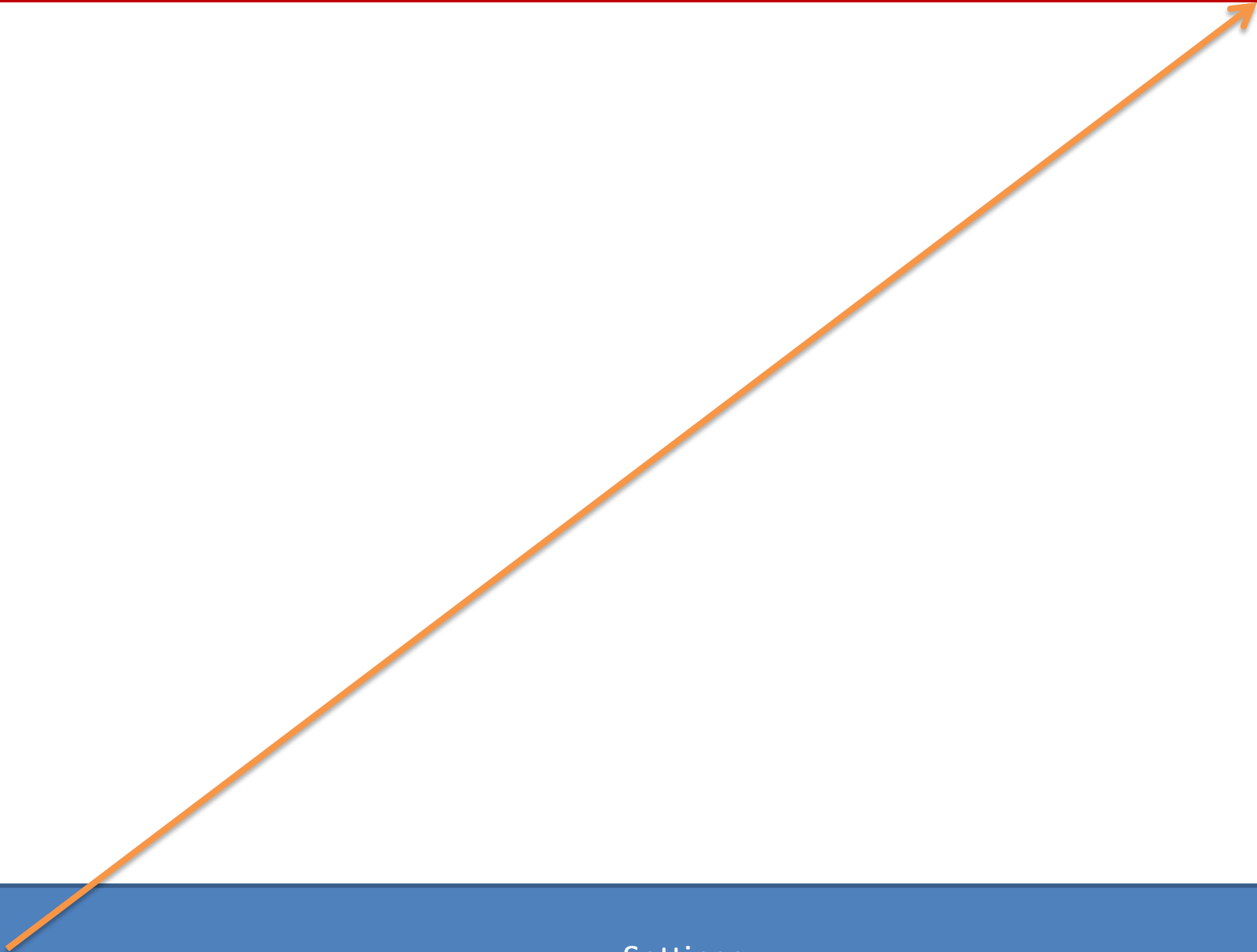
Search

Management

Custom List

Create Report

Settings



Settings.

This is where you'll find user settings and admin functionality.

# Asset Tracking System

## Phase 1

- Navigation
- Searching for Assets
  - Selecting an individual asset
  - Specifying criteria and listing many assets
- Individual Asset Screen
- Attribute Management
- Creating reports

Category: Notebook ▾

Subcategory: Lite 4/25e Notebooks ▾


Brand: Compaq ▾

Location: Comcast-Philadelphia ▾

Status: Broken ▾

Contact: ▾

Search



There are two ways to go:

1. If you know an assets ID number
  - a. type in the ID number,
  - b. click search, and
  - c. you will be directed to the *individual asset screen* ([slide 16](#)) detailing relevant information.
2. If you want to see all assets that meet your specified criteria
  - a. select what you want to see from the drop down menu,
  - b. click search, and
  - c. a list of assets will be display.

Continue to see more about specifying criteria...

More about Search.  
Selecting an individual asset.

<u>Category</u>	<u>Brand</u>	<u>Subcategory</u>	<u>Item #</u>
<a href="#">Select</a> Server	Compaq	ML330 Servers	1
<a href="#">Select</a> Desktop	Compaq	C900 Desktops	2
<a href="#">Select</a> Server	Compaq	ML370 G3 Servers	3
<a href="#">Select</a> Notebook	Compaq	N1000c Notebooks	4
<a href="#">Select</a> Desktop	Dell	Dimension 1300	5
<a href="#">Select</a> Desktop	Compaq	PIII 1.0GHz thru 1.3GHz (Slim) Desktops	6
<a href="#">Select</a> Notebook	Compaq	M700 Notebooks	7
<a href="#">Select</a> Notebook	Compaq	Notebook 100 Notebooks	8

Selecting criteria will create a list that can be used for a few different task options:

1. Select an individual asset → you will be directed to the aforementioned *individual asset screen* ([slide 16](#)) that displays all information for that asset.
2. (Phase II) Select multiple assets and perform a bulk transaction—for example, changing the status of several assets to “broken”.
3. (Phase II) Select one or more assets and move it to a custom list.

More about Search.

Specifying criteria and listing many assets.

# Asset Tracking System

## Phase 1

- Navigation
- Searching for Assets
- Individual Asset Screen
  - Viewing
  - Adding
  - Archiving and Deleting
  - Editing
- Attribute Management
- Creating reports

Id: 8

Category: Notebook

Brand: Compaq

Model: Lite 4/25e

Status: Broken

Location: Comcast Philadelphia

Owner: Vladimir Kerbasky

Status History:

10/31/02 - Broken

12/13/94 - Good

12/08/94 - In Service

05/05/87 - Good

Owner History:

05/05/87 - Vladimir Kerbasky

[Edit](#)[Archive](#)[Delete](#)

Once you select a single asset you are sent to the *individual asset screen*. All of the information relevant to that asset will be displayed including:

- ✓ Brand, Category, Model
- ✓ Current and past status
- ✓ Custom Details
- ✓ Location
- ✓ Current and past owners
- ✓ Purchase Information

Another way to get here:

- ✓ Add a new asset

Individual Asset Screen  
This is a read only screen.

Category: Desktop

Brand: Compaq

Sub-Category: AP200 (SDRAM Ver.) Wor

Location: Sabre1

Status: Goodie

Contact: Alba, Jessica

Cost:

Picture:

Details:

December 2008						
Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Date of Purchase:

### Adding an Asset:

1. Navigate to *Home*
2. Click *Add New Asset*

This brings you to a form that allows you to add attributes.

After filling in the forms and selecting to add the asset you will be redirected to the *individual asset screen*.

Id: 8

Category: Notebook

Brand: Compaq

Model: Lite 4/25e

Status: Broken

Location: Comcast Philadelphia

Owner: Vladimir Kerbasky

Status History:

10/31/02 - Broken

12/13/94 - Good

12/08/94 - In Service

05/05/87 - Good

Owner History:

05/05/87 - Vladimir Kerbasky

### Action Buttons

1. Delete
2. Archive
3. Edit

This asset was created as an example.  
Let's get rid of it.

Click the *Delete* button.

Edit

Archive

Delete

Back to the Individual Asset Screen.  
Action buttons.

Are you sure you want to permanently delete this asset?

Delete

Cancel

Delete – Permanently removes an asset and all associated information from the database.

Archive – Used to render an asset inactive. The information stays in the database and is available as historical data.

**We are deleting the asset** we just created **because it never existed** and we do not want records of it lingering in the database.

*Click Cancel for now so we can continue to use it for this exercise.*

Delete or Archive.

Id: 8

Category: Notebook

Brand: Compaq

Model: Lite 4/25e

Status: Broken

Location: Comcast Philadelphia

Owner: Vladimir Kerbasky

Status History:

10/31/02 - Broken

12/13/94 - Good

12/08/94 - In Service

05/05/87 - Good

Owner History:

05/05/87 - Vladimir Kerbasky

### Action Buttons

1. Archive
2. Delete
3. Edit

Let's click the *Edit* button.

Edit

Archive

Delete

Back to the Individual Asset Screen.  
Action buttons.

Id: 8

Category:	Notebook	Add
Brand:	Compaq	Add
Model:	Lite 4/25e Notebooks	Add
Location:	Comcast-Philadelphia	Add
Status:	Broken	Add
Owner:	Alba, Jessica	Add

Save

Cancel

Editing an asset is easy to do. Now that you have chosen to edit an asset you can change the asset's properties.

Used for:

- ✓ Assigning an asset to a new
  - ✓ Owner
  - ✓ Location
- ✓ Updating the asset's
  - ✓ Status
  - ✓ Details

To edit the asset change the attribute and click save.

Individual Asset Screen.  
Action Buttons → Edit.

Id: 8

Category: Notebook

Brand: Compaq

Model: Lite 4/25e

Status: Broken

Location: Comcast Philadelphia

Owner: Jessica Alba



Notice you are back to a read-only screen with the updates visible.

Let's go back to the Edit screen.

Status History:

10/31/02 - Broken

12/13/94 - Good

12/08/94 - In Service

05/05/87 - Good

Owner History:

12/05/08 - Jessica Alba

05/05/87 - Vladimir Kerbasky



Edit

Archive

Delete

Individual Asset Screen.

Action Buttons → Edit.

Id: 8

Category:	<input type="text" value="Notebook"/>	<input type="button" value="Add"/>
Brand:	<input type="text" value="Compaq"/>	<input type="button" value="Add"/>
Model:	<input type="text" value="Lite 4/25e Notebooks"/>	<input type="button" value="Add"/>
Location:	<input type="text" value="Comcast-Philadelphia"/>	<input type="button" value="Add"/>
Status:	<input type="text" value="Broken"/>	<input type="button" value="Add"/>
Owner:	<input type="text" value="Alba, Jessica"/>	<input type="button" value="Add"/>

Until now we have assumed that the attributes—location, status, etc—were populated in the dropdown boxes.

Adding an entry to an attribute lookup can be done by simply clicking the appropriate *Add* button.

*All of the add buttons take you to a form that is functionally the same from one form to the next, so let's just look at one of them.*

Click *Add* in the location row and you will be directed to the *Location Management Screen*.

Individual Asset Screen.

Adding an attribute from the individual Asset Screen.

# Asset Tracking System

## Phase 1

- Navigation
- Searching for Assets
- Individual Asset Screen
- **Attribute Management**
  - Adding and Updating
  - Deleting
- Creating reports

ID	1
Description	Sabre1
Company	Sabre1
Address 1	6172 10TH
Address 2	
City	Municipality of Murrysville
State	MD
Zip	
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">New</a>	
1 2 3 4 5 6 7 8 9 10 ...	

Model

Brand

Category

Location

Status

The Location Management Screen is accessible through two methods:

1. From the *Individual Asset Screen* (*how we got here*) OR
2. by navigating to **Management** → **Location**

We came here to add a new location so click *new*.

Notice, you can also edit or delete a location from this screen.

Attribute Management.  
Location Management.  
Adding a Location.

Description	Verizon
Company	Verizon
Address 1	
Address 2	1429 Walnut St
City	Philadelphia
State	PA
Zip	19110
<a href="#">Insert</a> <a href="#">Cancel</a>	

Let's switch to Verizon.

Fill out the information and click insert.

Attribute Management.  
Location Management.  
Adding a Location.

Id: 8

Category: Notebook

Brand: Compaq

Model: Lite 4/25e

Status: Broken

Location: Verizon 

Owner: Jessica Alba

Status History:

10/31/02 - Broken

12/13/94 - Good

12/08/94 - In Service

05/05/87 - Good

Owner History:

12/05/08 – Jessica Alba

05/05/87 - Vladimir Kerbasky

Edit

Archive

Delete

After filling out the information you will notice 1 of 2 things:

- A) *If you came here from the individual asset screen* you will return to that screen AND all of the information you edited will be repopulated into the fields with the new location selected.
- B) Otherwise, you would return to a read-only version of the location you just updated/added.

Notice that deleting an attribute will permanently remove that attribute

Attribute Management.  
Location Management.  
Adding a Location.

# Asset Tracking System

## Phase 1

- Navigation
- Searching for Assets
- Individual Asset Screen
- Attribute Management
- **Creating reports**



## Add Asset

By Brand

By Category

By Model

By User

By Location

By Status

A report displays assets grouped by the attributes selected.

Look at it as a pre-built search.

Let's click Create Report → By User.

Create Report.

Select a User:

Go

- All
- Alba, Jessica
- Kerbasky, Vladimir
- Jolie, Angelina

You will be prompted to select an individual user or all users from a drop down box.

In this example, Vladimir Kerbasky just happily retired. We want to see what assets are assigned to him so we can make sure they are all returned.

Select Vladimir from the drop down list then select *Go*.

Vladimir KerbaskyID   Status

- |    |                            |     |        |
|----|----------------------------|-----|--------|
| 1. | Compaq Notebook Lite 4/25e | 8   | Broken |
| 2. | Blackberry PDA Storm       | 237 | Good   |

[Export](#)

This report shows both of Vladimir's Assets.

This output can also be exported to excel.

# Asset Tracking System

## Phase 1

### Objective:

- Develop a core functioning application
- Display asset information
- Add/Archive assets
- Edit asset attributes
- Add custom attributes
- Support CSV exports