

HOW TO USE ASSETS MODULE

Navigate to Inventory/Capital Assets under Property -> Inventory/Capital Assets, and click on it



If you cannot click on Inventory/Capital Assets in iSoms menu, you will need to ask an administrator for permissions to this module before you can use it.

You are greeted with the search screen, where you can navigate to any Inventory/Capital Assets that have already been added and access them.

The screenshot shows the 'Assets: Search' interface. At the top, there are three tabs: 'ALL', 'LAST 7 DAYS ACTIVITY', and 'LAST 30 DAYS ACTIVITY'. Below the tabs is a section for 'Asset Status' with three radio buttons: 'Active' (selected), 'Disposed', and 'Any Status'. The main search area contains several filter fields: 'Purchased From', 'Purchased Through', 'Disposed From', 'Disposed Through', 'Item/Part Number', 'Agency Tag', 'Item Serial Number', 'Item Description', 'Item Classification', 'Make', 'Model', 'Color', 'Style', 'Location', 'Condition', 'Disposed Reason', 'Assigned From', 'Assigned Through', 'Assigned To', 'Warranty Expires From', 'Warranty Expires Through', and 'Comment/Keyword'. A 'SEARCH' button is located at the bottom right of the search area.

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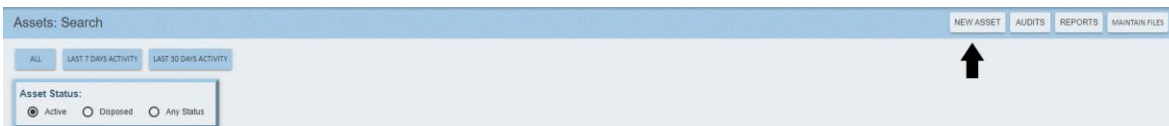
At the top of the search you have three quick search buttons that you can utilize to find all open, opened in the last 7 days, and opened in the last 30 days.

You can also search by keyword, Purchase From and Through Dates, Disposed Dates, Item/Part Number, Make, Model, Color, etc., then click the lookup button at the bottom. (Notice that All Agencies is not selected by default, so if you want to search All Agencies, check this option before search)

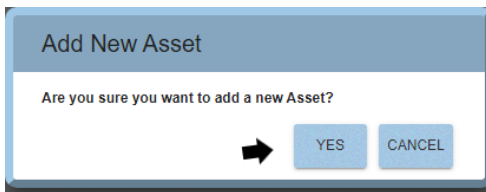
If any fields are missing, to enter something for those fields, they will be located in Maintain files in the top right. (If you cannot see this button, it is because you do not have permission) Ask administration to add something in the field you are needing.

HOW TO ADD NEW INVENTORY/CAPITAL ASSET

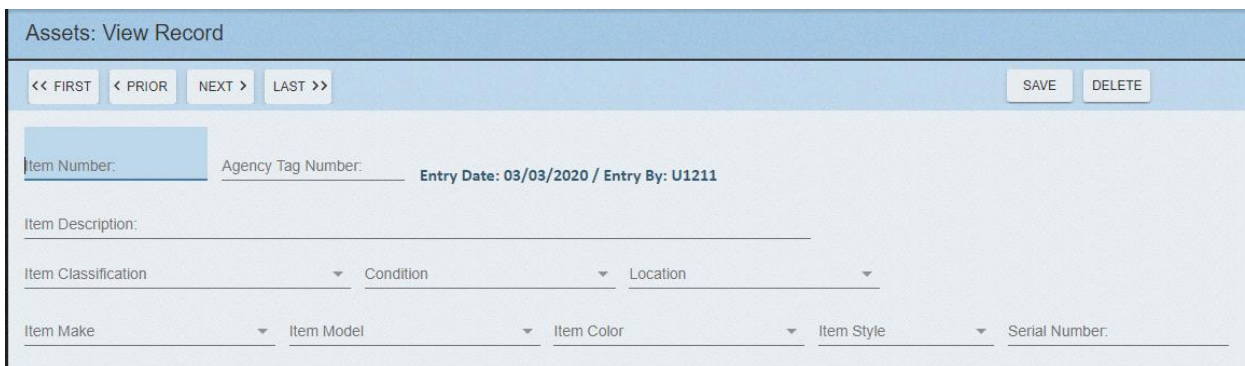
To add new ASSET, from the search screen, navigate to the top right where it says NEW ASSET. Click on NEW ASSET button.



It will ask, Are you sure you want to add a new ASSET? Click YES.



A new screen will appear where you can add your new ASSET. Enter Item Number, Tag Number, Item Description, Item Classification, any notes you may have, attachments need, and images you want to add.

A screenshot of the 'Assets: View Record' form. At the top, there are navigation buttons: '<< FIRST', '< PRIOR', 'NEXT >', and 'LAST >>'. To the right are 'SAVE' and 'DELETE' buttons. Below the navigation buttons are input fields for 'Item Number:', 'Agency Tag Number:', and 'Entry Date: 03/03/2020 / Entry By: U1211'. Below these is a text area for 'Item Description:'. Below the text area are three dropdown menus: 'Item Classification', 'Condition', and 'Location'. Below these are five more dropdown menus: 'Item Make', 'Item Model', 'Item Color', 'Item Style', and 'Serial Number:'. Each dropdown menu has a small downward arrow next to it.

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There are more tabs located towards the bottom to enter more information about this asset like Purchase Info, Service Info, Assignment History, Transaction History and more.

Purchase Info | Service Info | Assignment History | Transaction History | Notes | Images

Purchase Date: [calendar icon] 0 Purchase PO#: Invoice Number: Grant #: Purchase Condition: [dropdown]

Warranty Start: [calendar icon] Warranty End: [calendar icon] Warranty PO#: Warranty Invoice Nu... 0 Warranty Cost:

Disposition Date: [calendar icon] 0 Disposed Value: Disposed Condition: [dropdown] Disposed Reason: [dropdown]

Purchased From: [input] [SEARCH] [EDIT] [ADD]

When done entering new ASSET, click the save button in the top middle. This will add your new BOLO record.

HOW TO ACCESS INVENTORY/CAPITAL ASSETS REPORTS

When on the ASSETS search screen, in the top right next to the NEW ASSET button, find the REPORTS button and click on that.

Assets: Search [NEW ASSET] [AUDITS] [REPORTS] [MAINTAIN FILES]

ALL [LAST 7 DAYS ACTIVITY] [LAST 30 DAYS ACTIVITY]

Asset Status: Active Disposed Any Status

Purchased From: [calendar icon] Purchased Through: [calendar icon] Disposed From: [calendar icon] Disposed Through: [calendar icon]

Item/Part Number: Agency Tag: Item Serial Number: Item Description

Item Classification: [dropdown] Make: [dropdown] Model: [dropdown] Color: [dropdown] Style: [dropdown]

Location: [dropdown] Condition: [dropdown] Disposed Reason: [dropdown]

List Reports
Details Report
Transactions Report
Assignment Report
Stats Report
Form Reports
Custom Forms

There are many different kinds of reports here to choose from, but they all work the same. (For example go to List reports)

This will direct you to the Assets list reports page.

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YOUR AGENCY

Assets: List Reports

Records to Include:
 Active Only Disposed Only Any Status

Report Style
Listing

Purchased From: Purchased Through:

Disposed From: Disposed Through:

Warranty Expires From: Warranty Expires Through:

Item Classification: Make:

Model: Color:

Style: Condition

Location Disposed Reason

Purchased From:

Here you can narrow down your list report by Purchase Dates, Disposed Dates, Warranty Dates, Make, Model, Color, and more.

Make sure to choose the correct Report Style at the top from the dropdown.

Listing

By Classification

By Assigned To

Audit Listing

By Audit Disposition

By Audit Classification

By Audit Assigned To

By Make/Model

Once you have the right criteria entered that you want to see for your list reports, click view at the bottom to view. (Make sure PDF is selected in report format to view)

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Location Disposed Reason

Purchased From:

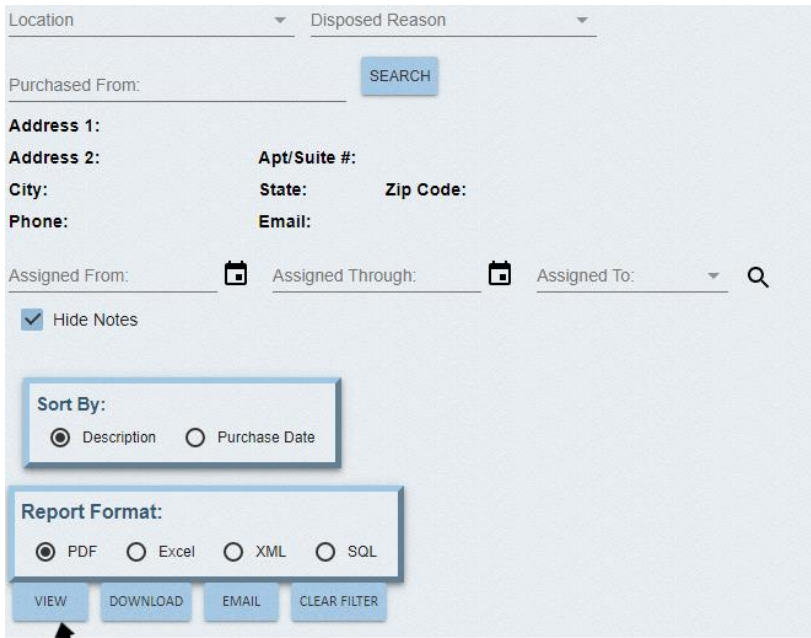
Address 1:
Address 2: **Apt/Suite #:**
City: **State:** **Zip Code:**
Phone: **Email:**

Assigned From: Assigned Through: Assigned To:

Hide Notes

Sort By:
 Description Purchase Date

Report Format:
 PDF Excel XML SQL



These report steps are the same for any of the reports that you choose from the REPORTS drop down. Follow these steps for any choice that you pick.

Version 1.1

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