Strategic Asset Tracking System®
User Guide
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1 Overview

The Strategic Asset Tracking System® is designed to make collecting asset data fast and reliable. Use the software to track computers, equipment, furniture, vehicles and other valuable assets.

This document is divided into several sections that explain the functions of the Strategic Asset Tracking System®.

➔ The Web Application section describes the main system functions available through the user interface.

➔ The Handheld Application section explains the main functions available to users accessing the application certified mobile computers. These functions are only available if you are using compatible Automatic Data Capture (ADC) devices.
2 Web Application

2.1 Logging In

Open the application from a client PC that has network access to the web application. When the system is launched Login screen will prompt you to enter valid account credentials to connect.

If you're using the Installed Version of the application, you can log in to the system using your existing Windows® Active Directory credentials.

➢ The network domain must be specified along with the Windows account username using the following format: domain/username.
If you’re using the *Cloud Version* of the application, you can login with your username and password.

### 2.2 Navigation

The Menu bar at the top right of the application screen includes the following hyperlinks:

- **Assets** – For adding assets, managing assets, and viewing asset history
- **Inventory** – For taking periodic physical inventories of your assets
- **Reports** – For generating reports on *Assets* or *Inventory* data
- **Labels** – For printing barcode labels or RFID tags (if applicable)

The *Settings* gear icon (also top right) allows you to access additional screens to update system settings.
Click any of the available menu hyperlinks to navigate to the requested screen. After you login, the interface will default to the Assets screen, which is where your assets will displayed in a grid.

Depending on the your user security settings (as defined on the Users screen), some or all of the menu links may be hidden from view. For more information about Role based security, please consult the Users section of this guide.

2.3 Assets

The Assets screen is where all asset information is entered. The sub tabs along the top of this section give you access to the following:

1. Favorites – A shortcut to commonly used asset data fields
2. Main Data – General information about each asset, including location and description
3. Purchasing – Purchasing information, including when and where each asset was purchased
4. User Fields – User Defined information about each asset
5. History – A log of changes to each asset
The toolbar on the Assets screen contains the following buttons:

Assets Toolbar

The buttons perform the following functions:

- **New** – Creates a new asset record
- **Copy** – Copies the details of an existing asset record into a new asset record
Reset – Discards pending changes and clears currently selected asset data

Delete – Removes an asset record from the system

Save – Commits an asset record entry to the database

The Assets screen also includes search functionality, giving you the ability to search for specific asset records. To search for an asset, type or scan an Asset ID or Serial Number into the Search by Asset ID/Serial text field and click the Search ( ) button. If an asset record with that entered Asset ID or Serial Number is found, the system will display the associated asset record.

⚠ Depending on the your security settings (defined on the Users screen), some or all of the toolbar buttons may be hidden from view. For more information about role-based security, please consult the Users section of this guide.

2.3.1 Favorites

The Favorites tab is the default view for the Assets screen, and contains the default fields for entering basic information about each of your assets, including Description, Serial Number, Building, Room, and Model.
To create a new asset, click the New button and enter a unique Asset ID. Click Save to add the asset to the database.

An Asset ID is required for every asset. Every Asset ID must be unique.

To edit an asset record, select the asset you want to edit. Make your changes. The interface supports inline editing, allowing you to make changes to one or more asset data fields from the current view. Click Save to commit your changes. You can also cancel changes before saving by clicking the Reset button.

To delete an asset record, select the asset you want to delete. Click the Delete button. Confirm the deletion when prompted to remove the asset record from the database.

To copy an asset record, select the asset you want to copy and click the Copy button. This creates a copy of the selected asset, enabling you to enter a unique Asset ID for the new record. Click the Save button to add the new asset record to the system.

The Quick Add feature enables you to populate select fields outside of the Setup screen. Clicking the Quick Add button ( ) for an available field generates a popup window allowing you to enter the required data for the new field record. New entries will be automatically associated with the active asset record.
2.3.2 Main Data

To enter, modify or view the main data for an asset, click on the Main Data tab.

Under the Main Data tab, you can enter information about each asset including Description, Serial Number, Building, Room, Manufacturer, Department, Person, Asset Type, & Status. The Notes field is a text field allowing up to 255 characters of text.

From the Main Data tab, users can associate new Building, Room, Manufacturer, Department, Person, Asset Type, and Status records using the Quick Add feature.

To make an asset inactive, click the Inactive checkbox. This will keep the asset in the database, but will it not appear on the Inventory or Reports screens.

The Added On and Last Updated fields are system generated and cannot be edited.
2.3.3 Purchasing

To enter, modify or view the purchasing data for an asset, click on the *Purchasing* tab.

Under the *Purchasing* tab, enter relevant purchasing details about each asset including *Vendor*, *PO Number*, *Cost*, *Account*, *Warranty Number*, *Lease Number*, *Warranty Start Date*, *Warranty End Date*, *Lease Start Date*, *Lease End Date*, and *Acquisition Date*.

From the *Purchasing* tab, users can associate new *Vendor* and *Account* records using the *Quick Add* feature.

2.3.4 User Fields

To enter, modify or view user-defined data for an asset, click on the *User Fields* tab.
**User Fields** created on the Setup screen appear under the **User Fields** tab. Field types include text, date and checkbox.

### 2.3.5 History

To view the history of changes for a selected asset, click on the **History** tab.
Here you can view an audit log of changes made to an asset in the system. The History tab will add a new row for each asset whenever a data value is updated. Scroll to the right to see the Last Updated timestamp and the Username of the person who made the change.

2.3.6 Import Data

Click on the Import Data button to import data into the system. You can access Import Data from all of the sub tabs of the Assets screen. The button (建材) is located above the list of assets displayed on the Assets screen.
Clicking the Import Data button allows you to select to Download Locations Template, Download Assets Template, Import New, Import Existing, or Import New and Existing.

**Download Locations Template**

If you select *Download Locations Template*, the system will generate a correctly formatted XLS Microsoft Excel spreadsheet for importing *Building* and *Room* records.
The Region, Building and Room ID fields are required for all rows to successfully import. Rows without valid data are omitted from the import process. You can import new locations or update existing locations records using this template.

.removed or changing the order of the columns in the import template will cause the import to fail.

**Download Assets Template**

If you select Download Assets Template, the system will generate a correctly formatted XLS Microsoft Excel spreadsheet for importing Asset records. The spreadsheet contains a column for each asset field, including user fields added from the User Fields menu of the Setup screen.

The Asset ID field is required for all rows to successfully import. Rows without a valid Asset ID will be omitted from the import process. You can add new assets or update existing asset records using this template.

.removed or changing the order of the columns in the import template will cause the import to fail.

**Import New**

Import New allows you to select a valid XLS or XLSX file to in order to add new assets or locations to the system. Select the file and click Open in the popup window. Then select either a Location Template or Asset Template. Only new entries will be added. Existing entries will be ignored.

.The first record imported will begin in Row 2 of the spreadsheet. Any fields you leave blank will be left unassigned (for new records) or cleared (for existing records) during the import process. Incorrectly formatted entries (such as words where numbers are expected) will fail to import. Drop down field entries that are not already in the system will also fail to import.

**Import Existing**

Import Existing allows you to select a valid XLS or XLSX file to add new asset records to the system. Select the file and click the Open button in the popup window. Then select an Asset Template. Only existing entries will be updated. New entries will be ignored.

.The first record imported will begin in Row 2 of the spreadsheet. Any fields you leave blank will be left unassigned (for new records) or cleared (for existing records) during the import process. Additionally, a location import will fail if this option is chosen. Incorrectly
formatted entries (such as words where numbers are expected) will also fail to import, as will drop down field entries that are not already in the system.

New and Existing

New and Existing allows you to select a valid XLS or XLSX file to add or update asset records in the system. Select the file and click the Open button in the popup window. Then select an Asset Template. Both new and existing entries will be added and updated.

The first record imported will begin in Row 2 of the spreadsheet. Any fields you leave blank will be left unassigned (for new records) or cleared (for existing records) during the import process. Additionally, a location import will fail if this option is chosen. Incorrectly formatted entries (such as words where numbers are expected) will also fail to import, as will drop down field entries that are not already in the system.

2.4 Inventory

The Inventory screen is where physical inventories are created and taken. An inventory consists of one or more Rooms, and the assets currently assigned to the selected rooms as a part of the inventory. To conduct the inventory, you scan or enter the Asset ID of each asset you locate in order to indicate that you've Found an asset for the given inventory.

The following inventory functions are available:

Manage Inventory – Create, close, and delete physical inventories
Take Inventory – Scan or enter Found assets, view current list of Found / Unfound assets by location
A compact view of the *Inventory* screen can be viewed from a mobile browser, enabling you to perform limited inventory functions on mobile devices.

Throughout the *Inventory* screen, users can find the following buttons:

**Add Inventory** – Create a new inventory.

**Save / Add to Inventory** – Save a new inventory or add *Buildings* to a selected inventory.

**Expand View** – Expand window view so you can update associated *Building / Room* values for a selected inventory.

**Close Inventory** – Permanently close the selected inventory from further changes.

**Copy Inventory** - Copies the selected inventory, including associated *Building / Room*

**Delete Inventory** – Remove the selected inventory from the system, discarding associated transactions.

### 2.4.1 Manage Inventory

You can create, edit, delete, copy or close existing inventories from the *Manage Inventory* menu.
To create a new inventory, click the Add New Inventory tab and give it a name. Click the Save / Add button. Each inventory record will display the Inventory Name along with the Created Date and Count showing the number of assets found versus number of assets included.

☛ An Inventory Name is required for all inventories. Each name must be unique.

After creating the inventory, you can Building and Room locations you would like to be included as part of that inventory. First, enter or select a Building from the drop down list and click the Save / Add to Inventory button. By default, all Rooms in that Building are added to the inventory. Uncheck Room locations and click the Save / Add to Inventory button to remove them from the inventory.

To close an inventory, select it and click the Close Inventory button. The system will prompt for confirmation. After an inventory has been closed, no further changes to the inventory are allowed.

☛ Once an inventory has been closed, it cannot be reopened!

To delete an inventory, select it and click the Delete Inventory button. The system will prompt for confirmation.

☛ Once an inventory is deleted, associated transaction data cannot be recovered!

2.4.2 Take Inventory

You can inventory assets by scanning or entering Asset ID's to indicate they have been located or ‘Found’ from the Take Inventory. Open inventories are displayed under the Take Inventory header.
Choose from the list of open inventories to view the assets associated with that inventory. The system will expand the selected inventory to display the current list of *Found* assets, along with each asset's associated data. Use the colored toggle bar to switch between views for *Found Assets* or *Unfound Assets*. You can also filter by *Building* or *Room*.

To conduct the inventory, enter your current *Building* and *Room* location, and then scan or enter the *Asset ID* of each of the assets in that location. Depending on the current view, the system will either add the entered asset record to the list of *Found Assets*, or remove the entered record from the list of *Unfound Assets*.

If an *Asset ID* isn't already in the database, the system will prompt you to enter information for the new asset record. By default, available asset fields are limited to the fields marked in the *Favorites* sub-tab from the Assets screen.
2.5 Reports

To access the reporting features of the system, click on *Reports* on the menu bar. Reporting categories include:

- **Asset Reports** – a list of assets including main data, purchasing, and user-defined fields.
- **Inventory Reports** – detailed results of inventories.

By default, the *Reports* screen shows all assets you have permission to view. You can switch between *Asset Reports* and *Inventory Reports* by selecting from the dropdown list. Both
options include functionality to filter and sort as needed. You can save your sort and filter preferences in *Manage Filters*.

Throughout the *Inventory* screen, users can find the following buttons:

- **Clear All Filters** - Removes all filters applied to the current Report view.

- **Export Data** - Exports the current report view to Excel format.

- **Filter** - Filters the data based on the criteria you select.

All buttons from the *Reports* screen can be accessed from both the *Assets* and *Inventory* report options.

### 2.5.1 Asset Reports

To view asset data, click on the *Reports* in the menu, or select *Assets* from the dropdown list.
You can narrow the scope of data displayed by selecting one or more *Filter* options. Simply by click the *Filter* button (🔍) for the desired column and select your filter criteria.

Columns that include filter functionality include *Asset ID, Description, Region, Building, Room, Serial No., Person, Vendor, Manufacturer, Department, Asset Type, Status,* and *Account.*

To sort data, click on a column header to sort the current list in ascending or descending order.

### 2.5.2 Inventory Reports

Select *Inventories* from the drop down list and click on an inventory to view the results.

Once selected, the system will default to a list of *Found* assets for that inventory. You can change the report type using the dropdown list. Available inventory report types include:

- **Found Assets** – Displays all found assets in the selected inventory
- **Found / Moved** – Displays assets whose locations were changed during the *Take Inventory* process
- **Found / New** – Displays assets added during the *Take Inventory* process
- **Unfound Assets** – Displays any assets not found during the selected inventory
You can narrow the scope of data displayed by selecting one or more Filter options. Simply by click the Filter button ( ) for the desired column and select your filter criteria.

Columns that include filter functionality include Asset ID, Description, Region, Building, Room, Serial No., Person, Vendor, Manufacturer, Department, Asset Type, Status, and Account.

To sort data, click on a column header to sort the current list in ascending or descending order.

### 2.6 Labels

Click on Labels on the menu bar to access the label printing functions.

Label printing is not available in the hosted version of the application.
You can print barcode or RFID labels directly from the application. The system can send print jobs to any networked printer via Zebra Programming Language (ZPL) commands. If you are using an RFID printer, the system can automatically encode passive UHF RFID tags from the Labels screen.

Please contact your Strategic Systems Account Manager for a list of compatible printers,

### 2.6.1 Print Labels

You can print barcode or RFID labels from the Print Labels menu.

- You must add your printer in Manage Printing before printing labels.
To print labels, select the *Layout*, *Label Type*, and *Printer* you want to use from the list of available options. Clicking the *Print* button will send the print job to the network printer you have selected.

The *Layout* field lets you specify your desired label Symbology (1-Dimensional or 2-Dimensional barcode) requirements, and the inclusion of up to two additional fields for custom text. You can also specify if the label includes an RFID inlay. If a *Layout* with either the *Heading* or *Subheading* option is selected, the interface will display the necessary fields for entering custom values to include on your labels. The *Heading* value will display above the printed barcode, and the *Subheading* value will display below the printed barcode.

The *Label Type* field provides for predefined label dimensions.

The *Printer* field lets you select where you want to print. To add printers to the list, authorized users can access the *Add Printer* function in the *Manage Printers* menu.

The *Prefix* field gives you the option of including a barcode (or RFID) prefix on all printed labels.

The *Start* field lets you specify the first barcode (or RFID) value to print.

The *End* field lets you define the last barcode (or RFID) value to print. Leaving the *End* field empty will print a single label using the *Start* value entered.

### 2.6.2 Manage Printing
You can add, update, or delete previously created printer entries in the Manage Printing menu. All added printers will display as options in the Label Printing menu of the Labels screen.

To add a printer, expand the list of options by clicking the Edit button under the Printers header. Enter a printer name or relevant description into the Printer Name field, and click the Add button to expand the new entry. Required fields for printers include the following:

I.P. Address – The network address of the printer. Users can contact their network administrator for additional information on determining valid IP addresses.

DPI – The Dots Per Inch (DPI) setting for the printer. You should consult the printer user manual for additional information regarding DPI setting requirements.

RFID-Enabled – This slider bar used to differentiate between straight barcode and RFID-enabled printers. When this value is set to False, the printer will not display as an option if an RFID Label Type is selected from the Label Printing menu.

Calibrate - This button sends the automatic printer calibration command to the printer at the IP Address specified. The Calibrate command can be helpful when troubleshooting issues with printed labels.

To edit a printer, select the printer name from your drop-down list to expand the printer's current settings. You can update printer settings using inline editing from the browser interface. Clicking the Save button will update the printer's settings. Clicking the Cancel button will discard pending changes.

To delete a printer, select the printer from the dropdown list and click the associated Delete button. The interface will prompt for confirmation before removing the printer from the
system. Deleted printers will no longer display as options under the *Printer* list in the *Label Printing* menu.

### 2.7 Settings

Each interface screen includes a link to the *Settings* menu. This menu contains navigation access to the following screens:

* **Account** – For updating system settings and product licensing information
* **Setup** – For adding new records to asset data field lists
* **Users** – For defining role-based security settings and integration with Windows Active Directory
* **About** – For viewing Version Number, Copyright, and contact information
* **Change Password** – For changing a user’s password (only relevant for SaaS versions of Asset Tracking)

![Screen Shot](image.png)

### 2.8 Account

You can enter your company information, update system settings, and register the application for multiple users on the *Account* tab.
The following menus are available under the Account screen:

Registration – Activating product serial numbers
Information – System settings including Logos, Colors, and Currency
Import Data – Importing location and asset data from Asset Tracking V5

2.8.1 Registration

The Registration menu is where you can enter product serial numbers to remove trial license limitations and add additional users.
From the Register tab, you can enter a valid product serial into the Serial Number field and click the Activate button. The system will validate the entered serial number and generate an Activation Key to complete the registration.

If the product serial number can't be validated due to network or firewall restrictions, you will be required to send your company information, product serial number, and Server ID to registrations@sstid.com. Our support team will respond with the Activation Key required to complete the registration.

Alternatively, our support team can provide you with a License Key file that can be submitted to the application using the Upload License Key function. This allows you to save the license key to the server and select the file to complete the registration.

2.8.2 Information

You can enter your company information on the Information tab, including Company Name, Address, Phone, and Email. You can also define the Currency format you would like used throughout the system.

You can personalize the system by uploading your company logo. To select an image file, click the Upload button. The system will generate a popup window enabling you to select the file from a networked location. After selecting the file, click the Update button to save
the logo. The system will automatically scale images to the required dimensions (50px by 175px).

The logo image will display on all interface screens, including on the RFID handheld application (if applicable). Clicking the *Logo* from any screen will advance the system to the *Assets* screen.

You can also update the *Primary Color* and *Secondary Color* used throughout the system. Click on one of the current colors to bring up the color picker window. Select the color or enter the HEX code and click *Update*.

### 2.9 Setup

You can rename and organize asset fields used throughout the system on the *Setup* screen.

Fields on the *Setup* page are organized into *Favorites, Main Data, Purchasing*, and *User Fields*, just like the tabs on the *Assets* screen.

You can rename any field using the *Alternate* text field. If a valid *Alternate* value is entered, the system will display the new value in place of the default label throughout the system.

*Alternate* field values are associated with the current system language. If a different language is selected from the *Alt Language* list, you can specify a new *Alternate* field value to associate with the newly selected language.
You can populate lists for the following fields from the Setup screen:

*Region* – Bottom tier level for classifying the asset. Each Region can be contain multiple Building values
*Building* – Each Building can be associated with a single Region, and each Building can contain multiple Room values
*Room* – Each Room value can be associated with a single Building
*Manufacturer* – The company that originally produced the asset
*Department* – Defined area of responsibility within an organization for grouping the asset such as Human Resources or Information Technology
*Person* – Employee or person responsible for the asset
*Asset Type* – A category for classifying the asset such as computers, equipment or furniture.
*Status* – Used to indicate the condition or state on the asset such as new, good or poor.
*Vendor* – The company or organization from whom the asset was purchased
*Account* – Used for tracking accounting data like a general ledger account or a cost center

The Count value indicates the number of list items associated with each field.

### 2.9.1 Favorites

Fields listed as Favorites will display in the Favorites tab on the Assets screen, as well the handheld application. For more information about the handheld application, please refer to Section 4 of this guide.

You can drag and drop to reorder the fields or click on the star icon to remove the field from the list of favorites.
By default, the *Favorites* section includes the *Description, Serial Number, Building, Room, and Model* fields. You can make additional fields *Favorites* by clicking on the star icon next to the desired field.

### 2.9.2 Main Data

In the *Main Data* section, you can rename labels or add list items for basic information about each asset.

By default, the *Main Data* section includes *Description, Serial Number, Building, Room, Model, Manufacturer, Department, Person, Asset Type, Inactive, Notes, Status, and Region* fields. You can populate the associated lists for the *Building, Room, Manufacturer, Department, Person, Asset Type, Status, and Region* fields.

**Building**

To add a new *Building*, expand the list of buildings, clicking the *Expand View* icon in the *Building* menu. Then click the *Add New* icon. The *Name* field is required for each entry, but
you assign the new building to a Region (if applicable) and add optional address data. When finished, click the Save button to add the building to the system.

To edit an existing Building, expand the list of buildings and click the Edit button for the record you want to edit. Using the inline editor, make your changes and click the Save button to update the record.

To delete a Building, expand the list of buildings and click the Delete button for the record you want to eliminate. After confirming your requested deletion, the system will remove the record from the database.

☛ By default, deleting a Building record that has assigned Rooms will also remove all associated Rooms from the system. By default, assets that were previously assigned to a deleted Building will be reassigned to the “UNSPECIFIED” building.

Room
To add a new Room, expand the list of rooms, clicking the Expand View icon in the Room menu. Then click the Add New icon. The Name field is required for each entry, but you assign the new building to a Region (if applicable) and add optional address data. When finished, click the Save button to add the room to the system.

To edit an existing Room, expand the list of rooms and click the Edit button for the record you want to edit. Using the inline editor, make your changes and click the Save button to update the record.

To delete a Room, expand the list of rooms and click the Delete button for the record you want to eliminate. After confirming your requested deletion, the system will remove the record from the database.

☛ By default, assets that were previously assigned to a deleted Room will be reassigned to the “UNSPECIFIED” room.

Manufacturer
To add a new Manufacturer, expand the list of manufacturers by clicking the Edit icon in the Manufacturer menu. The Name field is required for each entry, and each Manufacturer record also includes fields for associating optional address and contact information data. Click the Save button to add the new record to the system.

To edit an existing Manufacturer, expand the list of manufacturers and click the Edit button for the desired record. Update the desired fields using the inline editor, and click the Save button to update the record.
To delete an existing Manufacturer, expand the list of manufacturers and click the Delete button for the desired record. After confirming the delete, the system will remove the record from the database.

☛ By default, deleting a Manufacturer record that has assigned Assets will reassign assets to the “UNSPECIFIED” manufacturer.

**Department**

To add a new Department, expand the list of departments by clicking the Edit icon in the Department menu. The Name field is required for each entry, and each Department record also includes fields for associating optional address and contact information data. Click the Save button to add the new record to the system.

To edit an existing Department, expand the list of departments and click the Edit button for the desired record. Update the desired fields using the inline editor, and click the Save button to update the record.

To delete an existing Department, expand the list of departments and click the Delete button for the desired record. After confirming the delete, the system will remove the record from the database.

☛ By default, deleting a Department record that has assigned Assets will reassign assets to the “UNSPECIFIED” department.

**Person**

To add a new Person, expand the list of people by clicking the Edit icon in the Person menu. The Name field is required for each entry, and each Person record also includes fields for associating optional address and contact information data. Click the Save button to add the new record to the system.

To edit an existing Person, expand the list of people and click the Edit button for the desired record. Update the desired fields using the inline editor, and click the Save button to update the record.

To delete an existing Person, expand the list of people and click the Delete button for the desired record. After confirming the delete, the system will remove the record from the database.

☛ By default, deleting a Department record that has assigned Assets will reassign assets to the “UNSPECIFIED” person.

**Asset Type**
To add a new *Asset Type*, expand the list of asset types by clicking the *Edit* icon in the *Asset Type* menu. The *Name* field is required for each entry. Click the *Save* button to add the new record to the system.

To edit an existing *Asset Type*, expand the list of asset types and click the *Edit* button for the desired record. Update the desired fields using the inline editor, and click the *Save* button to update the record.

To delete an existing *Asset Type*, expand the list of people and click the *Delete* button for the desired record. After confirming the delete, the system will remove the record from the database.

☛ By default, deleting an *Asset Type* record that has assigned Assets will reassign assets to the “UNSPECIFIED” asset type.

**Status**
To add a new *Status*, expand the list of statuses by clicking the *Edit* icon in the *Status* menu. The *Name* field is required for each entry. Click the *Save* button to add the new record to the system.

To edit an existing *Status*, expand the list of statuses and click the *Edit* button for the desired record. Update the desired fields using the inline editor, and click the *Save* button to update the record.

To delete an existing *Status*, expand the list of people and click the *Delete* button for the desired record. After confirming the delete, the system will remove the record from the database.

☛ By default, deleting a *Status* record that has assigned Assets will reassign assets to the “UNSPECIFIED” status.

**Region**
To add a new *Region*, expand the list of statuses by clicking the *Edit* icon in the *Region* menu. The *Region* field is required for each entry. Click the *Save* button to add the new record to the system.

To edit an existing *Region*, expand the list of regions and click the *Edit* button for the desired record. Update the desired fields using the inline editor, and click the *Save* button to update the record.

To delete an existing *Region*, expand the list of people and click the *Delete* button for the desired record. After confirming the delete, the system will remove the record from the database.
By default, deleting a Region record that has assigned Assets will reassign assets to the “UNSPECIFIED” region. Region may not be available in all versions of the application.

2.9.3 Purchasing

In The Purchasing section, you can rename labels or add list items for purchasing information about each asset.

By default, the Purchasing section includes Vendor, PO Number, Acquisition Date, Cost, Account, Warranty Number, Lease Number, Warranty Start Date, Warranty End Date, Lease Start Date and Lease End Date fields. You can populate the associated lists for the Vendor and Account fields.

Vendor
To add a new Vendor, expand the list of vendors by clicking the Edit icon in the Vendor menu. The Name field is required for each entry, and each Vendor record also includes
fields for associating optional address and contact information data. Click the Save button to add the new record to the system.

To edit an existing Vendor, expand the list of vendors and click the Edit button for the desired record. Update the desired fields using the inline editor, and click the Save button to update the record.

To delete an existing Vendor, expand the list of vendors and click the Delete button for the desired record. After confirming the delete, the system will remove the record from the database.

» By default, deleting a Vendor record that has assigned Assets will reassign assets to the “UNSPECIFIED” vendor.

Account
To add a new Account, expand the list of accounts by clicking the Edit icon in the Account menu. The Name field is required for each entry, and each Account record also includes fields for associating optional address and contact information data. Click the Save button to add the new record to the system.

To edit an existing Account, expand the list of vendors and click the Edit button for the desired record. Update the desired fields using the inline editor, and click the Save button to update the record.

To delete an existing Account, expand the list of accounts and click the Delete button for the desired record. After confirming the delete, the system will remove the record from the database.

» By default, deleting an Account record that has assigned Assets will reassign assets to the “UNSPECIFIED” account.

2.9.4 User Fields
You can create custom text, date, and checkbox fields in the User Fields section.
You can create up to 50 user fields. Slide the On/Off toggle to “On” to make the field active. Click on the start icon to make it to the Favorites menu.

2.9.5 Import Data

Click on the Import Data button to import data into the system. You can access Import Data from all of the rows in the Setup screen. The button ( ) is located above the list of assets displayed on the Assets screen.

Clicking the Import Data button allows you to select Download Template, Import New, Import Existing, or Import New and Existing.
Download Template

If you select *Download Locations Template*, the system will generate a correctly formatted XLS Microsoft Excel spreadsheet in order to add or update system records.

The *Region*, *Building* and *Room ID* fields are required for all rows to successfully import in the *Room* import. Rows without valid data are omitted from the import process.

The *First Name* and *Last Name* fields are required for all rows to successfully import in the *Person* import. Rows without valid data are omitted from the import process.

All other imports on the *Setup* page require only the first field (*Name*) to import successfully.

 Removing or changing the order of the columns in the import template will cause the import to fail.

Import New

*Import New* allows you to select a valid XLS or XLSX file to in order to add new assets or locations to the system. Select the file and click *Open* in the popup window. Then select either a *Location Template* or *Asset Template*. Only new entries will be added. Existing entries will be ignored.

 The first record imported will begin in Row 2 of the spreadsheet. Any fields you leave blank will be left unassigned (for new records) or cleared (for existing records) during the import process. Incorrectly formatted entries (such as words where numbers are expected) will fail to import. Drop down field entries that are not already in the system will also fail to import.

Import Existing
Import Existing allows you to select a valid XLS or XLSX file to add new asset records to the system. Select the file and click the Open button in the popup window. Then select an Asset Template. Only existing entries will be updated. New entries will be ignored.

* The first record imported will begin in Row 2 of the spreadsheet. Any fields you leave blank will be left unassigned (for new records) or cleared (for existing records) during the import process. Additionally, a location import will fail if this option is chosen. Incorrectly formatted entries (such as words where numbers are expected) will also fail to import, as will drop down field entries that are not already in the system.

New and Existing

New and Existing allows you to select a valid XLS or XLSX file to add or update asset records in the system. Select the file and click the Open button in the popup window. Then select an Asset Template. Both new and existing entries will be added and updated.

* The first record imported will begin in Row 2 of the spreadsheet. Any fields you leave blank will be left unassigned (for new records) or cleared (for existing records) during the import process. Additionally, a location import will fail if this option is chosen. Incorrectly formatted entries (such as words where numbers are expected) will also fail to import, as will drop down field entries that are not already in the system.

2.10 Users
You can enable Windows authentication using Windows Active Directory integration from the *Users* screen. You can also define *Roles* using names of User Groups that exist on the same network as the web application. Connected Windows users have system access privileges based on the defined security settings for the user's associated *Role(s)*. If a Windows user is assigned to multiple *Roles*, the system allows full system access.

To add a new *Role*, enter the *Name* for the *Role* and click the *Add* button. For security purposes, newly added *Roles* will not be assigned access by default.

To copy an existing *Role*, click the *Copy* button for the desired *Role* you want to duplicate and enter a *Name*. Click the *Save* button to add the new *Role*.

To edit a *Role*, click the *Edit* button for the *Role* you want to change and update the desired settings. Click the *Save* button to update the settings for the selected *Role*. The *Domain Users* Role cannot be edited.

To delete an existing *Role*, click the *Delete* button for the *Role* you want to eliminate and confirm the deletion when prompted. The *Domain Users* Role cannot be deleted.

Within each *Role*, administrators have the ability to restrict access to selected screens by defining *Page Permissions* for the Roles. Administrators can also restrict access to visible data by defining *Data Permissions*.

By default, *Domain Users* will exist as a defined Role with full administrator privileges over the entire system. To avoid being locked out of the system, the *Domain Users* role cannot be edited or deleted.

### 2.10.1 Page Permissions

After adding a Role, users with Admin rights can choose to restrict access by defining *Page Permissions* for that Role.
Access to each interface screen can be defined as *Show or Hide*. When access is set to *Hide*, the system will restrict user access to the given screen. By default, newly created Roles will have all Page Permission values set to *Hide*. The *Assets, Inventory, Reports,* and *Labels* screens contain submenus that can be restricted from the *Page Permissions* menu.

Within the *Assets* screen, administrators can set access to functionality as *Full, Edit* (restricting *Add* and *Delete* functionality), or *View Only*. Additionally, access to the *Import Data* feature can be restricted from the *Assets* screen.

Within the *Inventory* screen, users can limit a Role's access to *Full or None* for the *Take Inventory* and *Manage Inventory* submenus.

Within the *Reports* screen, users can limit a Role's access to *Full or None* for the *Assets Report* and *Inventory Report* types.

Within the *Labels* screen, users can limit a Role's access to *Full or None* for the *Manage Printing* submenus.
Page Permission definitions may affect available functionality for users of the optional handheld application.

### 2.10.2 Data Permissions

After adding a Role, users with Admin rights may choose to restrict access to available asset data by defining *Data Permissions* for that Role. Access to asset data can be restricted by the assigned location values for the assets (*Regions, Buildings*, and *Rooms*).

To display the current *Data Permission* settings, click the *Locations* header. By default, no *Data Permissions* are defined for created Roles.

To update *Data Permission* settings, click the Filter icon (🔍), and use the associated checkboxes to allow access to given *Regions* or *Buildings*. Expanding a *Region* will display all *Buildings* assigned to that *Region*.

Click the *Apply* button to save *Data Permission* settings.

Click the *Clear* button to remove all *Data Permission* settings for the given Role.

*Data Permission* definitions also affect access to data from the optional handheld application.
2.11 About

The About screen provides details on the version of Asset Tracking you are running, as well as contact information for support.

2.12 Change Password

The change password screen gives you the ability to update your password information.
Enter your Old Password, a New Password and confirm the New Password. Hit Save and your password will be updated.

➥ Your new password must meet complexity requirements.
3 Handheld Application

The Strategic Web Asset Tracking System includes a handheld application that runs on approved mobile barcode and RFID-enabled devices. From the handheld application, you can view asset data, perform asset updates, and take physical inventories from a supported mobile device. If the application is deployed to an approved mobile RFID-enabled device, you can also read and encode UHF passive RFID tags. For a list of approved handheld devices, please contact your Strategic Systems Account Manager.

After installation, the handheld application can be configured to connect to the web server hosting the Asset Tracking application, either via a wireless connection or in batch mode over a USB connection from a networked PC.

To launch the application, click the Asset Tracking icon from the list of installed programs.
When the system is launched, the interface will direct users to the Login screen.

3.1 Login

After the mobile application is launched, you will be taken to the Login screen. You can login using existing domain account credentials with access defined by security settings designated in the Users screen of the web application.

You must use an active network connection in order login for the first time. Once you have successfully connected to the mobile application, the system encrypts and caches your login credentials on the device for (60) days. Each subsequent login will renew the expiration of your saved credentials for another (60) days.
After entering valid username and password, click the *Login* button to connect to the application.

Clicking the *Exit* button closes the application and returns you to the handheld interface.

An active network connection is required anytime security settings are changed from the *Users* screen.

### 3.2 Navigation

After logging in, you will be taken to the *Welcome* screen, where you can choose from the following options: *Load, Update, Inventory, Encode,* and *Settings*.

![Handheld Application Screenshot]

*Depending on security settings, you may not have full access to all functions of the handheld application. User privileges to handheld features can be adjusted from the *Users* screen in the web application.*

*Load* - Load asset data for updates or physical inventories.
Update - Scan assets and make general changes to asset data outside of a physical inventory.

Inventory - Conduct physical inventories of previously created open inventories.

Encode - Read and encode UHF passive RFID tags.

Settings - Adjust configuration preferences and RFID settings (if applicable).

Logout - Logs you out of the application, then opens the Login screen.

The handheld application also includes the following navigation buttons on all screens:

- Back: This button returns you to the previous screen.

- Main Menu: This button displays the Welcome screen, allowing you to access the list of system functions.

3.3 Load

The Load screen enables you to store asset data locally on the handheld. Select one or more Buildings to pull data from your web server.
By default, the Load screen enables you to load data for General Updates. The list of Buildings available in General Update includes all Buildings that the current user has authorization to access. The list of options will also include the Inventory Name for all currently open inventories. Selecting an existing inventory from the list will filter available Buildings assigned to the selected inventory.

An active network connection is required in order for the Load function to work. If no connection is available, the application will continue to attempt to load data until connectivity is established.

### 3.3.1 Loading Data for General Update

Selecting the General Update option from the Load screen will display the full list of Buildings. Buildings that were previously loaded will display the number of assets loaded for the given Building. Each Building entry includes a checkbox so you can Load or Clear its data from the handheld database.
Clicking the *Load* button will load data for currently selected *Buildings*. The system will display a progress bar detailing the status of the load for each *Building*. When the load is completed, the progress bar will display in Green, with the total number of assets for the given *Building*.

Clicking the *Clear* button will remove locally stored data for currently selected *Buildings*.

### 3.3.2 Loading Data by Inventory

Selecting the *Inventory* option from the *Load* screen will filter the list of *Buildings* so that only *Buildings* assigned to that inventory will be displayed. *Buildings* that were previously loaded will show the number of assets loaded from the given *Building*. Each *Building* entry includes a checkbox, enabling you to *Load* or *Clear* data from the handheld database.
Clicking the Load button will load data for any Buildings you select. The system will display a progress bar indicating the status of the load for each Building. When the load is completed, the progress bar will display in Green, and the total number of assets for the given Building will display.

Clicking the Clear button will remove locally stored data for currently selected Buildings.

3.4 Update

From the Update screen, you can scan or manually enter the Asset ID or Serial Number of the asset you want to update. If network connectivity to the server is active ( ), the system will search across the networked database for a matching record. If network connectivity to the server is inactive ( ), the system will use the local handheld database for the search.
You can scan multiple barcode labels or RFID tags (if applicable) during a single session to populate a list of assets.

Additional handheld settings defined from the Settings screen allow you to further specify RFID settings, including the RFID tag Prefix and Encoding settings. Please refer to the Settings section of this User Guide for further information.

### 3.4.1 Scan Assets with Barcode

To search by scanning a barcode, ensure that the RFID checkbox is not checked, and scan the desired barcode with the integrated scanner.
If the asset exists in the database, the interface will display the associated Asset ID and Description for the found record. If the scanned value does not correspond to an existing Asset ID, the system will search for an associated Serial Number for an existing asset.

- If the searched value exists as both an Asset ID and a Serial Number for different asset records, the system will display data for the Asset ID match only.

If no asset record is found, the system will add the scanned value to the list of scanned Asset IDs, leaving the Description field empty. The system will also display an “N” signifying that the asset is New.

To update a previously scanned asset, select the asset from the list and click the Edit button to access the Edit Asset Data window for the selected asset.

To clear the list of previously scanned assets, click the Clear button.
To navigate to the Welcome screen, click the Back or Main Menu buttons. Navigating away from the Update screen will push changes to asset data to the web server when network connectivity is established.

3.4.2 Scan Assets with RFID Reader

To search by reading an RFID tag, check the RFID checkbox. Clicking the barcode icon will activate the laser barcode scanner to enable barcode scanning.

If the asset exists in the database, the interface will display the associated Asset ID and Description for the found record. If the scanned value does not correspond to an existing Asset ID, the system will search for an associated Serial Number for an existing asset.
If the searched value exists as both an Asset ID and a Serial Number for different asset records, the system will display data for the Asset ID match only.

If no asset record is found, the system will add the scanned value to the list of scanned Asset IDs, leaving the Description field empty. The system will also display an “N” signifying that the asset is New.

To update a previously scanned asset, select the asset from the list and click the Edit button to access the Edit Asset Data window for the selected asset.

To clear the list of previously scanned assets, click the Clear button.

To navigate to the Welcome screen, click the Back or Main Menu buttons.

3.4.3 Updating Asset Data from the Edit Assets Window

You can view and update data for previously scanned assets by selecting the asset from this list and clicking the Edit button.
You can update values for the selected asset by typing into the text fields or selecting from the dropdown lists. Click the Save button to store changes to the asset data locally to the device. The system will synchronize the asset record to the server when network connectivity is established.

Clicking the Cancel button will discard pending changes to the asset data.

Clicking the Remove button will prompt the user for confirmation, and remove the selected asset from the list of scanned assets.

Clicking the Back or Main Menu buttons from the Edit Assets window will advance the user to the requested screen.

☛ Only data from asset data fields marked as Favorites from the Setup screen will display on the handheld application.
3.5 Inventory

The *Inventory* function enables you to take physical inventories using the handheld application. Prior to using the *Inventory* function, at least one inventory should be loaded to the handheld from the *Load* function.

The *Inventory* field allows users to select from a list of previously loaded inventories on the handheld.

After selecting an *Inventory*, users can select from the filtered list of *Buildings* and *Rooms*, and click the *Take* button to begin scanning assets into inventory.

➜ Until a valid *Room* is selected, the *Take* button will display as a *View* button. The *View* function allows users to display the current list of *Found* and *Unfound* assets assigned to the selected *Inventory*.
Alternatively, users can scan a barcode or RFID tag to populate the Room field. To read an RFID tag for a Room, users must ensure the RFID checkbox is enabled. After entering a valid Room value, the Building and Inventory lists will filter to those for the selected Room. If only one Inventory and Building is associated with the selected Room, the system will auto populate the fields for the user and automatically advance to the Scan Assets screen.

### 3.5.1 Display Found Assets

After selecting to View or Start an inventory the system will, by default, display the list of unfound assets associated with that inventory. To access the list of Found assets, toggle over to the Found tab from the Inventory screen.

The Found list will display the Asset ID and associated Description values for assets that have been previously scanned into the selected Inventory and Room.
To enter assets into an inventory by scanning a barcode, ensure that the RFID checkbox is not checked, and use the devices integrated scanner to automatically capture the asset barcode.

To enter assets into an inventory by reading RFID tags, ensure that the RFID checkbox is checked, and pull the trigger to scan RFID tags using the integrated RFID antenna. Clicking the barcode icon will enable the integrated barcode scanner.

If the **Found** list is accessed from the **View Inventory** function, you can only view additional data for selected assets.

If the **Found** list is accessed from the **Start Inventory** function, you can edit additional data for selected assets.

### 3.5.2 Display Unfound Assets

After selecting to **View** or **Start** an inventory, users can view the list of **Unfound** assets by selecting the **Unfound** tab from the **Inventory** screen. The **Unfound** list will display the **Asset ID** and associated **Description** values for assets that have not yet been entered into the selected inventory.
To enter assets into inventory by scanning a barcode, ensure that the RFID checkbox is not checked, and use the device's integrated scanner to capture the asset barcode.

To enter assets into an inventory by reading RFID tags, ensure that the RFID checkbox is checked, and pull the trigger to scan RFID tags using the integrated RFID antenna. Clicking the barcode icon will enable the integrated barcode scanner.

If the Unfound list is accessed from the View Inventory function, selecting an asset from the list will allow users to view additional data for the selected asset.

### 3.5.3 Updating Asset Data from the Edit Assets Window

Users can view and update data for previously scanned assets by selecting the asset from this list and clicking the Edit button. Fields marked as Favorites will display in the Edit Assets window, giving you the ability to update data using the associated text fields or drop down lists.
Clicking the **Save** button will store changes to the asset data locally on the device.

Clicking the **Cancel** button will discard pending changes to the asset data.

Clicking the **Remove** button will prompt the user for confirmation, and then remove the selected asset from the list of scanned assets.

Clicking the **Back** or **Main Menu** buttons from the **Edit Assets** window will discard pending changes and advance the user to the requested screen.

Only data from asset data fields marked as **Favorites** from the **Setup** screen will display on the handheld application.

### 3.6 Encode

If using the application from an RFID-enabled handheld, the **Encode** function will display on the **Welcome** screen.
To read an RFID tag that has already been encoded, present the RFID tag in front of the RFID antenna of the handheld and click the Read button. The value encoded in the tag will display on the screen.

To encode an RFID tag, type or scan the data you want to encode. Depending on the Prefix and Encoding values defined from the Settings screen, up to 24 characters may be entered. Once the data is entered, present the single RFID tag in front of the RFID antenna of the handheld and click the Encode button.

If the encoding is successful, a ‘Success’ message will display.

If the encoding is not successful, a ‘Failed’ message with an explanation will display.

The RFID version of the application can only be used with UHF passive RFID tags.

Additional handheld preferences defined from the Settings screen enable you to further specify RFID settings, including RFID tag Prefix and Encoding.
3.7 Settings

The Settings screen enables you to update configuration preferences for the handheld application.

The Reader Strength slider bar adjusts the strength of the integrated RFID antenna. To increase the power of the RFID antenna, the slider should be moved to the Right.

The Encoding checkbox enables you to select between ASCII and HEX encoding. Depending on the Encoding value you choose, the system will display all RFID tag reads in the associated format throughout the application. Users can also enter a Prefix for the selected encoding value.

The Asset Tracking Server field lets you specify the address of the server application. When a connection to a network is active (via Wi-Fi or USB connectivity), the system will attempt to communicate with the web application using the entered Server value.

Entering a Prefix affects how the handheld application reads and encodes RFID tags throughout the application. The list of read RFID tags on the Update and Inventory screens
will display only those tags with the indicated *Prefix* encoded to the tags. RFID tags encoded via the application on the *Encode* screen will automatically include the *Prefix* in the encoded tag data.