

# **MobileAsset Users' Manual**

## ***Web Module***



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# Welcome

## Getting Started

The following steps will get you started using the MobileAsset. These steps should be done in order. Click on the links provided below to see the Help topics necessary to perform each step.

The steps below discuss manually entering information into your database; however, much of this data can be imported using the MobileAsset PC application. Importing data is also discussed in the MobileAsset Quick Start Guide that came with your CD. The Quick Start Guide is also available for download at:

Even if you are planning on importing your information, we recommend that you review the steps below to help you understand how the different types of data interrelate.

**Note:** The screen shots in this Help file are from Internet Explorer using the Vista operating system. The look of some screens may vary slightly in different browsers and operating systems.

1. Use the MobileAsset PC application to setup your **Groups** and **Users** in **Security** and to define your **Company** information. Please see the MobileAsset Online Help for more information on using the PC application.
2. [Create Sites](#) and [Create Locations](#): Once your Groups and Users are setup and you have entered your Company information in the PC application, you are ready to begin entering sites and locations into the database.

A site is a major classification for areas that contain assets within your company. For instance, if you have two warehouses, you might set up MobileAsset to have two sites: Warehouse 1 and Warehouse 2. You must enter at least one site before can add assets to your system.

Assets that you enter into your system must each be assigned to a Site and a Location within that site. Using the example above, within Warehouse 1, you might have three locations: Main Storage Area, Manager's Office and Administrative Office. We suggest creating one site for each building that contains assets.

It is important to note that you can have the same Location code defined at more than one Site - for instance, Warehouse 1 and Warehouse 2 may each have Location codes of Shelf 1 - so always pay attention to which Site you are working with when performing transactions.

Setting up your locations now will allow you to just pick a Location from a list when you begin adding inventory later. It is possible, however, to define Locations as you add inventory.

If you already have location information contained in another database, you may want to use MobileAssets Import function rather than manually entering in this information. For more information on importing locations, please refer to the topic Importing Into the Database in the MobileAsset PC Online Help.

You must create a minimum of one Site, one Location at that Site.

3. [Create Vendors](#), [Create Manufacturers](#), [Create Depreciation Classes](#): **These are all optional features.** You can manually create or import this information. It is helpful to

## MobileAsset Users' Manual

enter this information prior to setting up your assets.

4. **Create Asset Types:** This is the first step in creating an Asset in the application. You must first create your Asset Types, then each asset you add to the system must be assigned to a specific Asset Type. You can think of Asset Types as a classification for assets. For instance, you may have an Asset Type of *IBM Laptop X6000* that defines the manufacturer, size specs, etc. of this particular type of computer. Then specific computers of the same type are assigned as assets to the *IBM Laptop X6000* asset type. Asset Types are created in the database using the New Asset Type screen. You can then assign assets to a specific asset type on the New Asset screen.

The Asset Type defines the Description, Depreciation Class, Category, Manufacturer and Model Number of the asset.

5. **Create Assets:** One or more **Assets** can be assigned to each Asset Type. The individual assets are a unique item of a specific make and model number. Each asset is given an Asset Tag that is unique across all Sites and Locations.

You are now ready to perform transactions on your MobileAsset application!

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## Definitions

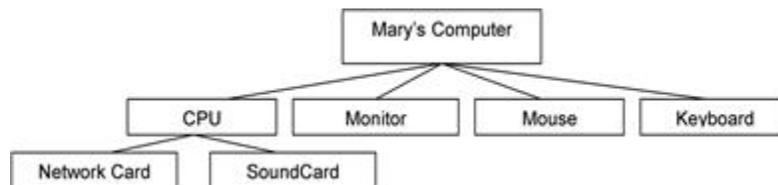
### Asset

One or more **Assets** can be assigned to each Asset Type. The individual assets are a unique item of a specific make and model number. Each asset is given an Asset Tag that is unique across all Sites and Locations.

### Asset Linking

Asset Linking, also known as Asset Kitting, allows you to link two or more assets together to form one new asset. For example, the asset Mary's Computer may consist of 4 separate assets - CPU, Keyboard, Mouse and Monitor. These four individual assets are linked together to form one new asset, Mary's Computer. In this example, Mary's Computer is known as the "Parent" asset and the four component assets are the "Child Assets".

A child asset can have only one parent, however, a parent may have multiple child assets and be a child itself. In this scenario, the linking might look like this:



In the example above, Mary's Computer is the parent of the assets CPU, Monitor, Mouse and Keyboard. CPU is the parent of Network Card and SoundCard.

Therefore, CPU is both the child of Mary's Computer and the parent of Network Card and SoundCard.

### Asset Tag

A unique identifier you assign each asset in your database (this is done on the New Asset screen). The tag can be letters or numbers or a combination of both. The asset tag is printed and attached to the physical asset. Creation of the tags can be done using the Wasp Labeler application that installed when you installed the software. To access Labeler, from the **Main** screen, click **Labels > Asset Tags**.

The number on the tag corresponds to the asset tag number in the database. An asset tag usually contains a barcode for quick identification and tracking.

### Asset Type

This is the first step in creating an Asset in the software. You must first create your Asset Types, then each asset you add to the system must be assigned to a specific Asset Type. You can think of Asset Types as a classification for assets. For instance, you may have an Asset Type of *IBM Laptop X6000* that defines the manufacturer, size specs, etc. of this particular type of computer. Then specific computers of the same type are assigned as assets to the *IBM Laptop X6000* asset type. Asset Types are created in the database using the New Asset Type screen, or you can import this information. You can then assign assets to a specific asset type on the New Asset screen.

The Asset Type defines the Description, Depreciation Class, Category, Manufacturer and Model Number of the asset.

**Description** can be any text used to describe the Asset Type.

**Depreciation Class** controls whether or not depreciation will be calculated for this Asset Type (Depreciation Class is further defined below).

**Category** is a superset of the Asset Type. This can be very broad (furniture, computer equipment, etc.) or more specific (desk, chair, lamp, monitor, PC, keyboard, etc.)

**Manufacturer** records the brand or maker of the Asset Type.

**Model #** records the manufacturer's designation for this Asset Type.

## Depreciation Class

Depreciation Classes can be created to determine a specific Depreciation Method.

The Depreciation Class is assigned to one or more Asset Types (on the New Asset Type screen). All assets assigned to that Asset Type will follow the Depreciation Method defined in the specified Depreciation Class.

## Depreciation Methods

If you are using the Standard version of MobileAsset, you have two depreciation methods: *None* and *Straight Line*. If you are using the Professional version, you will have six depreciation methods to choose from: *None*, *Straight Line*, *Double Declining Balance*, *150% Declining Balance*, *Declining Balance Custom* and *Sum of the Years' Digits*.

Definitions for each of these methods are provided below:

- **Straight Line** - The simplest and most commonly used depreciation method, straight line depreciation is calculated by taking the purchase or acquisition price of an asset subtracted by the salvage value divided by the total productive years (Life) the asset can be reasonably expected to benefit the company.

**Example:**

purchase price of asset – approximate salvage value  
----- (divided by) -----  
estimated useful life of asset

Assume you buy a new computer for your business costing approximately \$5,000. You expect a salvage value of \$200 selling parts when you dispose of it. Accounting rules allow a maximum useful life of five years for computers; in the past, your business has upgraded its hardware every three years, so you think this is a more realistic estimate of useful life, since you are apt to dispose of the computer at that time. Using that information, you would plug it into the formula:

\$5,000 purchase price - \$200 approximate salvage value  
----- (divided by) -----  
3 years estimated useful life

The answer, \$1,600, is the depreciation charges your business would take annually if you were using the straight line method.

- **Double Declining Balance** - The double declining balance depreciation method is similar to the straight-line method. To use it, the system first calculates depreciation as if it were the straight line method. Then it determines the total percentage of the asset that is depreciated the first year and doubles it. Each subsequent year, that same percentage is multiplied by the remaining balance to be depreciated. At some point, the value will be lower than the straight-line charge, at which point, the double

declining method should be scrapped and straight line used for the remainder of the asset's life. Remember that the IRS does allow businesses to switch depreciation methods one time in the life of an asset.

MobileAsset will not make this switch for you. It is up to the individual business to keep track of when the switch to straight line depreciation should be made.

In MobileAsset, you must enter at least 100% for the custom declining balance.

**Example:**

In our straight-line example, we calculated that a \$5,000 computer with a \$200 salvage value and an estimated useful life of three years would be depreciated by \$1,600 annually. The first year, we have to compare this to the total amount to be depreciated, in this case, \$4,800 [\$5,000 base - \$200 salvage value = \$4,800]. Dividing \$1,600 by \$4,800, we discover the straight-line depreciation charge [\$1,600] is 33.33% of the total depreciation amount [\$4,800]. Using this information, we double the 33.33% figure to 66.67%.

In the first year, we would take \$4,800 multiplied by .6667 to get a total depreciation charge of approximately \$3,200. In the second year, we would take the same percentage [66.67%] and multiply it by the remaining amount to be depreciated. Continuing with the example, we find that \$1,600 is the remaining amount to be depreciated at the start of the second year [\$4,800 - \$3,200 = \$1,600]. Multiply 1,600 by .6667 to get \$1,066. This is the depreciation charge for the second year – or not! Remember that once the depreciation charges dip below the amount that would be charged using the straight-line method, the double declining balance should be scrapped and straight line immediately utilized. The straight line method called for charges of \$1,600 per year. Obviously, the \$1,066 charge is smaller than the \$1,600 that would have occurred under straight line. Thus, the depreciation charge for the second year would be \$1,600.

The equation below illustrates this method:

depreciable base \* (2 \* 100% / useful life in years)

- **150% Declining Balance** - This method uses 150% of the straight-line percentage for the first year. The same percentage is then applied to the remaining balance, each succeeding year.
- **Declining Balance Custom** - This method allows you to enter a custom declining balance percentage. Declining Balance is a common depreciation-calculation system that involves applying the depreciation rate against the non-depreciated balance. Instead of spreading the cost of the asset evenly over its life, this system expenses the asset at a constant rate, which results in declining depreciation charges each successive period.

**Example:**

If an asset that costs \$1,000 is depreciated at 25% each year, the deduction is \$250.00 in the first year and \$187.50 in the second year, and so forth.

- **Sum of the Years' Digits** - To calculate depreciation charges using the sum of the years' digits method, take the expected life of an asset (in years) count back to one and add the figures together.

**Example:**

10 years useful life =  $10 + 9 + 8 + 7 + 6 + 5 + 4 + 3 + 2 + 1$  Sum of the years = 55

In the first year, the asset would be depreciated 10/55 in value [the fraction 10/55 is equal to 18.18%] the first year, 9/55 [16.36%] the second year, 8/55 [14.54%] the third year, and so on. Going back to our example from the straight-line method: a \$5,000 computer with a \$200 salvage value and 3 years useful life would be calculated as follows:

3 years useful life =  $3 + 2 + 1$  Sum of the years = 6

Taking \$5,000 - \$200 we have a depreciable base of \$4,800. In the first year, the computer would be depreciated by 3/6ths [50%], the second year, by 2/6 [33.33%] and the third and final year by the remaining 1/6 [16.67%]. This would have translated into depreciation charges of \$2,400 the first year, \$1,599.84 the second year, and \$800.16 the third year. The straight-line example would have simply charged \$1,600 each year, distributed evenly over the three years of useful life.

### Location

Locations are places within a particular Site where Assets reside. Typically, a **Site** is a building or area that contains one or more inventory **Locations**. For instance, *Sebastian's Office* might be a location within the site *My Company*.

### Child Asset

An asset that is linked to a parent asset. See the illustration in the Asset Linking definition, above.

### Parent Asset

Any asset that has child assets attached to it. See the illustration in the Asset Linking definition, above.

### Serial Number

If an asset has a **Serial Number** and you choose to record it, it is associated with a specific Asset, not with an Asset Type.

### Site

The software can manage assets at one or more **Sites** (specific buildings or vehicles) depending on the version of the software you have. Typically, a **Site** is a building that contains one or more asset Locations. For instance, *Sebastian's Office* might be a location within the site *My Company*. Pay attention to the Site you are working with when using Asset.

## Logging In

[Logging In to MobileAsset](#)

[Logging In Using Windows NT Authentication](#)

[Using the Sample Company](#)

[Logging In When You Have Access to Multiple Databases \(Enterprise Only\)](#)

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### Logging In to MobileAsset Web:

After entering the URL of MobileAsset you will be presented with the Login page.

1. The **Login** page of the MobileAsset application is where you will enter your user name and password. An example of this page is shown below:



The screenshot shows the MobileAsset Web Edition login interface. It features a yellow header with the 'MobileAsset' logo and 'Web Edition' text. Below the header is a photo of a woman. The main area contains two input fields for 'User Name' and 'Password', a checkbox for 'Use Sample Company', and a 'Login' button. At the bottom, it shows 'Version: 6.1 (Build: 7.20.2010.248)' and a 'Help' link.

2. Enter your **User Name** and **Password**, then click the **Login** button. The **User Name** and **Password** are the same as your MobileAsset User Name and Password (set on the **Add New User** screen in the MobileAsset PC application).

Click the **Help** link to access this help file.

The **Main Menu** will appear. Please refer to the topic Navigating the **Main Menu** for more information on this page.

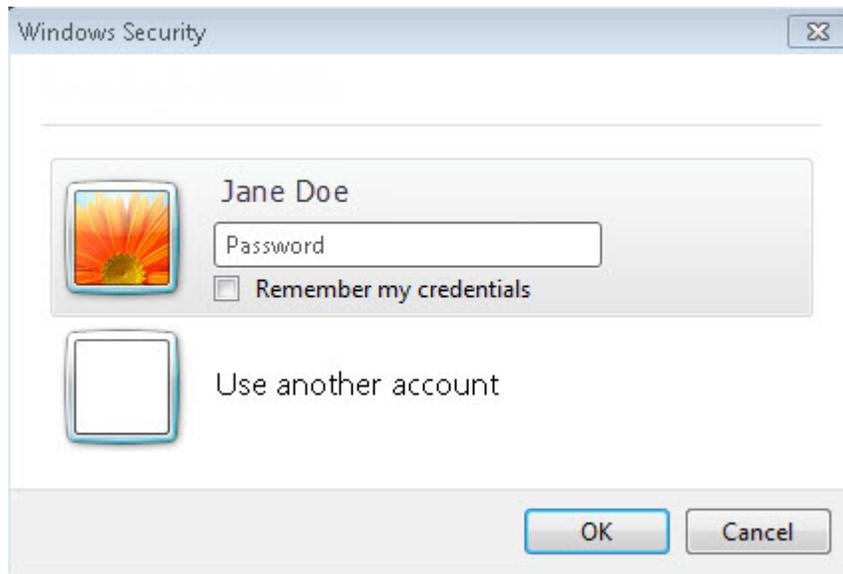
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### Logging In Using Windows NT Authentication:

If your business is using Windows NT Authentication, MobileAsset will recognize any Groups setup in the MobileAsset PC application that match a group in the Active Directory and take care of the user account creation process for you.

1. If Windows NT Authentication is turned on, the first time a user tries to access MobileAsset from his/her network machine, the standard **Windows Network Login**

screen, similar to the one shown below, will appear:



2. After entering the user name and password, the OS will check to see if a **Group** exists in MobileAsset matching the group this user is assigned to in the Active Directory. If there is, the user is logged on to MobileAsset and a **User Account** is automatically created for this user in the Mobile Asset PC Application (**Security > Manager Users**).

---

### Using the Sample Company:

If you want to log in using the Sample Company, select the **Use Sample Company** checkbox, then click the **Login** button. This company contains a set of data you can use to learn about MobileAsset. You can practice using the features and functions contained in the software using this data. You can enter information into the Sample Company; however, when upgrading to a new version, this data will be lost. It is very important that you do not enter any information into the Sample Company that you do not want to lose. The Sample Company is meant for training purposes only and should not be used as your working database. For more information on using the Sample Company, please refer to the topic [Using the Sample Company](#).

**MobileAsset**  
*Web Edition*

User Name Password

Use Sample Company

Version: 6.1 (Build: 7.20.2010.248)

---

### Logging In When You Have Access to Multiple Databases (Enterprise Only)

If you have created multiple databases for use with two or more companies, you will see the **Company Selection List** after logging on. You will only see this screen if you have access to more than one database.

**Using Windows NT Authentication with Multiple Companies:** If you have multiple companies setup in MobileAsset (see [Working with Multiple Companies](#)) and you are using Windows NT Authentication, the process works much the same as above, except the user will be taken to the **Company Selection List** to choose the company they want to work with before entering MobileAsset.

---

## Company Selection List

The **Company Selection List** page appears after you log on to MobileAsset if you have created multiple databases and you have access to more than one database.

### Selecting a Company:

1. After logging in to MobileAsset, you will see a page similar to the following (if you have created multiple databases and you have access to more than one database). You will only see those companies to which you have been given access in **Security** in MobileAsset on the PC. The first time you log in using the Admin login, you will see all companies.



Company	Group Name
Wasp Barcode Technologies	
Test DB 6-4-10	
WaspTrackAssetMain	Wasp Team
WaspTrackAssetMain	Wasp Development

2. Click on the company you wish to access. MobileAsset will open with the desired company's information displayed. Note that the title bar at the top of the window indicates which company you currently have open.

Click **Cancel** on the **Company Selection List** to return to the **Log In** page.

---

## Using the Sample Company

The **Sample Company** contains a set of data you can use to learn about MobileAsset. You can practice using the features and functions contained in the software using this data.

You can enter information into the Sample Company; however, when upgrading to a new version, this data will be lost. It is very important that you do not enter any information into the Sample Company that you do not want to lose. The Sample Company is meant for training purposes only and should not be used as your working database.

### Accessing the Sample Company:

1. On the **Log In** page, select the **Use Sample Company** checkbox, then click the **Login** button. The following message appears:



Click **OK** on the popup message.

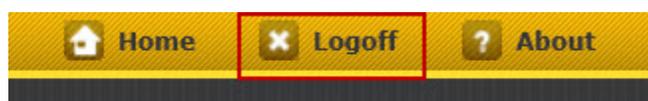
2. You can use the software as normal once logged in. You can create additional asset types and assets, link assets, dispose of assets, etc. When using the Sample Company, the **Main Menu** will display **Wasp MobileAsset Trial Company** in the title bar. On reports, the company name and each address line will be followed by "trial".

---

### Windows NT Authentication Users:

If you are using Windows NT Authentication, follow these steps to access the Sample Company:

1. Log off MobileAsset Web by clicking the Log Off link on the toolbar:



The **Log Out** screen will appear.

2. On the **Log Out** screen, click **Log In as Different User**.



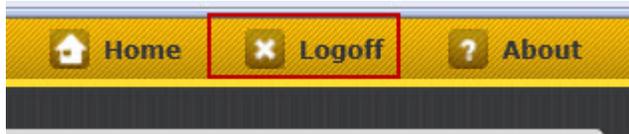
The MobileAsset **Web Log In** screen appears.

3. Select **Use Sample Company**, enter your **User Name** and **Password**, then click **Login**.



## Logging Out

To **Log Out** of MobileAsset, click the **Log Out** button from the top of any page.



The **Log In Again** screen will appear:



Click the **Here** button to [Log In](#) again or click [Login as a Different User](#).

---

## Login as Different User

If your business is using Windows NT Authentication, the user currently logged into the computer is automatically logged into MobileAsset. If a different user needs to log in to MobileAsset from a machine where a user is already logged in, click the **Log Out** button at the top of the screen.



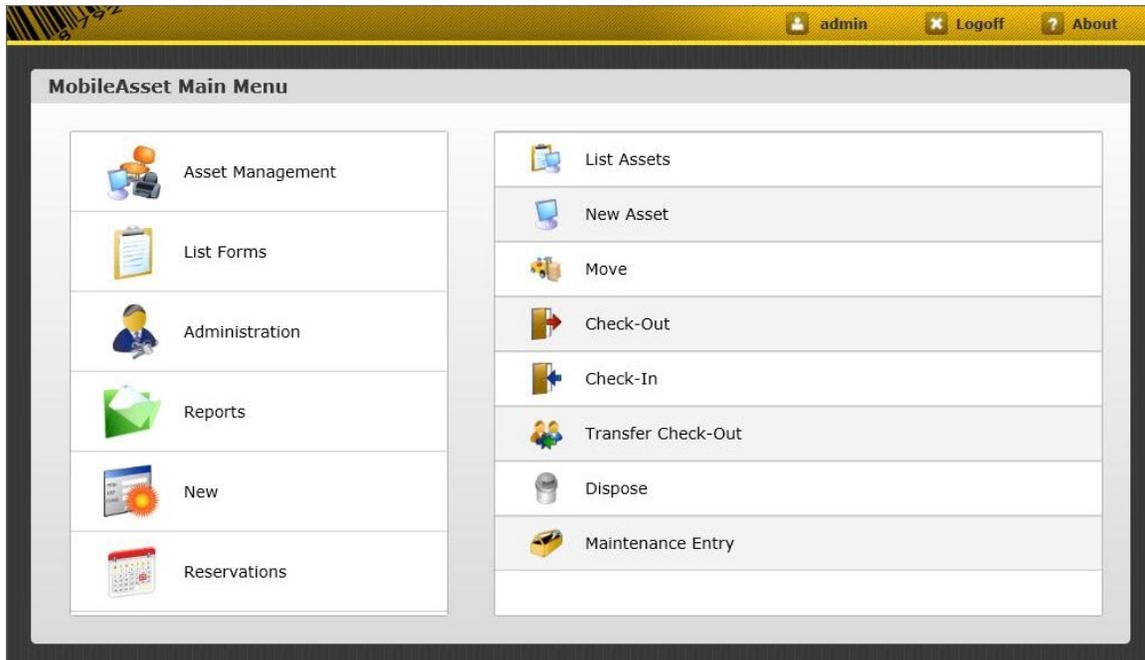
The [Log On](#) page appears allowing you to login again or login as a different user.



## Navigating the Main Menu

The **Main Menu** is the first page you will see upon logging in to MobileAsset. You can access all of the features of MobileAsset from the **Main Menu**. The **Main Menu** first appears with the Asset Management options displayed by default.

Below is an example of the **Main Menu**:



The **Main Menu** is divided into two sections:

### [Title Bar](#)

### [Navigation Window](#)

#### **Title Bar**

The **Title Bar** is visible from any screen in MobileAsset. The database/company currently open (if you have created more than one database) and the **Username** of the user currently logged in display here.



This section also contains the following links:

**Home** - Click this icon to return to the **Main Menu** from any screen in MobileAsset.

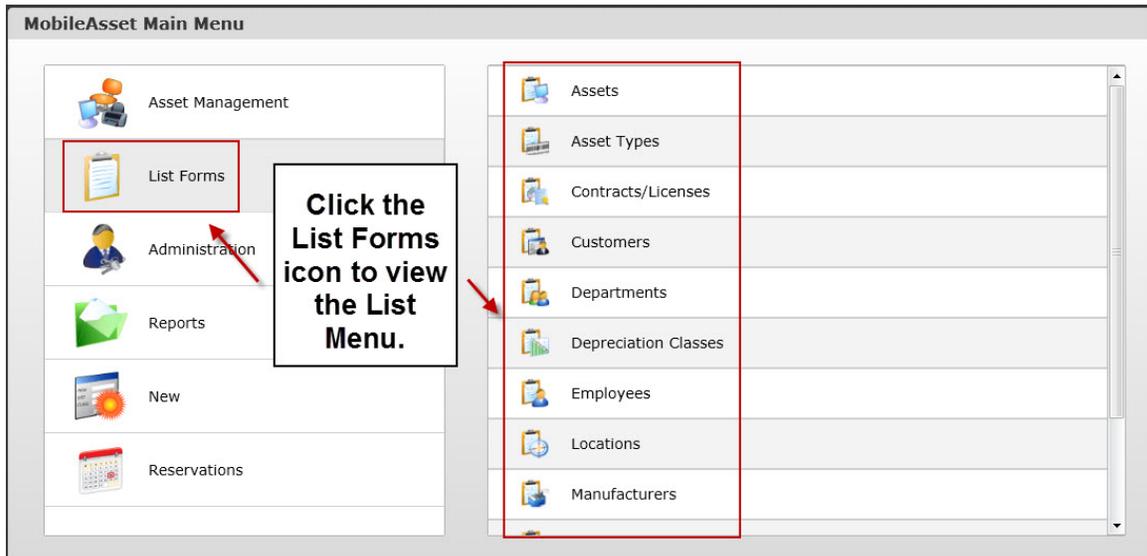
**Logoff** - Click this icon to log out of MobileAsset. The **Log Off** screen will appear allowing you to log in again or [log in as a different user](#).

[About](#) - Click this icon to view information about this version of MobileAsset.

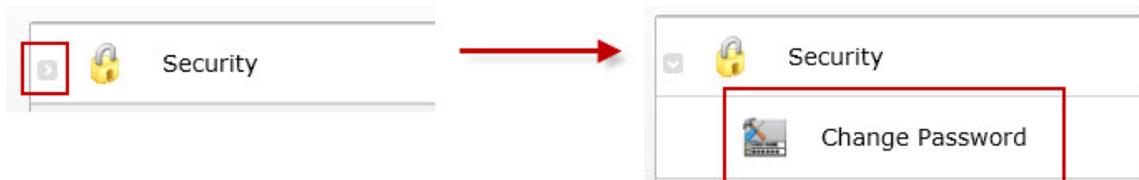
---

## Navigation Window

The **Navigation Window** displays icons you can use to access various parts of the software. When you first open MobileAsset, the **Asset Management** menu will be open. To open another menu, click on the icon on the left. For example, if the **List Forms** icon is clicked, the **List** menu will appear, as displayed below:



If an arrow precedes an option, click on the icon to reveal the options:

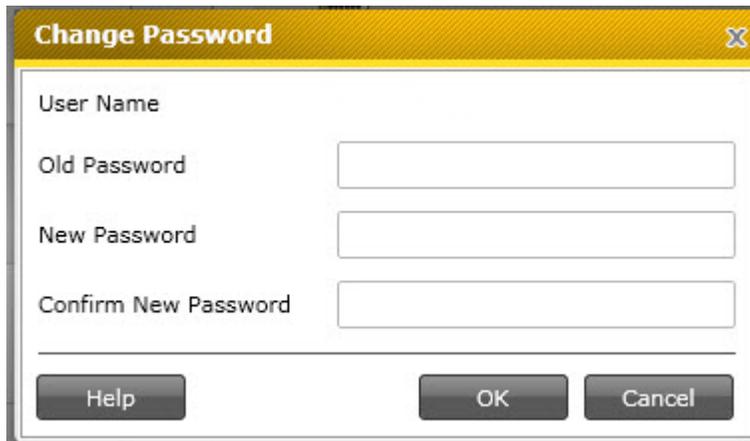


When the menu items are displayed, a down arrow will precede the menu. Click the icon to hide the menu options.

## Changing Your Password

The **Change Password** feature allows you to change your current password. Keep in mind that if you are using Windows NT Authentication, changing your password in MobileAsset does not change your network password. If you change your MobileAsset password, you will need to use your new password (not your network password) to login to MobileAsset on the web or on the PC. For more information on Windows NT Authentication, please see the [Security](#) topic.

1. To access this feature from the **Main Menu**, select **Administration > Security > Change Password**.



The screenshot shows a 'Change Password' dialog box with a yellow header. It contains the following fields and buttons:

- User Name (text input)
- Old Password (password input)
- New Password (password input)
- Confirm New Password (password input)
- Buttons: Help, OK, Cancel

2. Enter your old password followed by your new password. Enter your new password again, then click the **OK** button to save the changes.

### Password Rules:

- Passwords are case sensitive.
- A Password may contain any of the following characters:

A - Z (uppercase & lowercase),

0 - 9

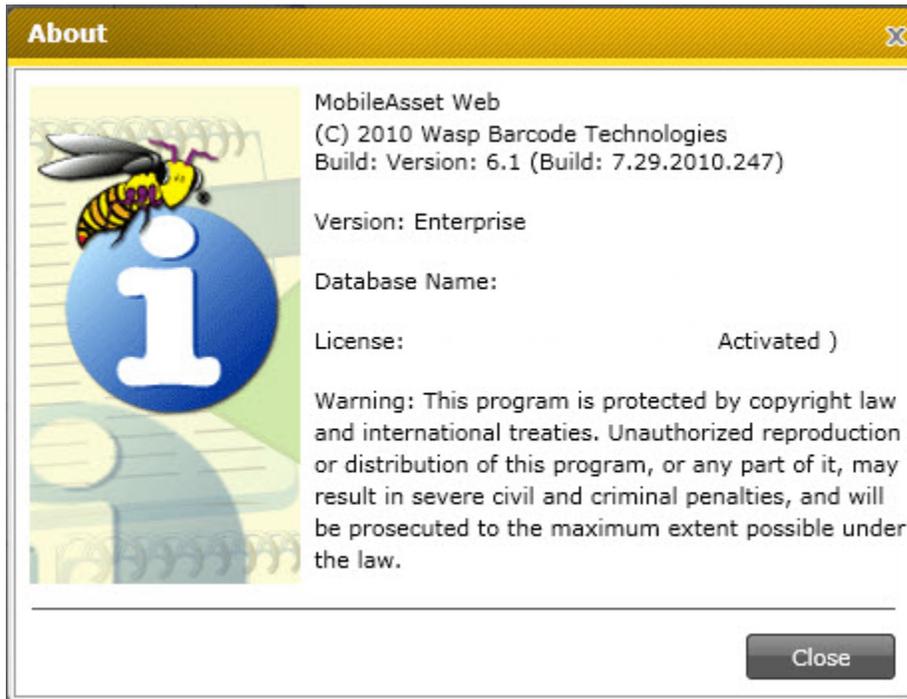
or any of these special characters: ` ~ ! @ # \$ % ^ & \* ( ) \_ + - = [ ] { } | < > ? : ; ,

---

## About Screen

Click the **About** icon to view details about your version of MobileAsset and license details.

Below is an example of the **About** screen:



Click **Close** to close the screen.

---

# Adding Information

## Adding New Assets

The **New Asset** page is used to enter a new asset into the database.

The following topics are discussed in this section:

[Accessing the New Asset Page](#)

[General Tab](#)

[Asset Linking Tab](#)

[Depreciation Tab](#)

[Attachments Tab](#)

[Picture Tab](#)

[Maintenance Tab](#)

[Contracts Tab](#)

[Transaction History Tab](#)

[Custom Fields Tab](#)

---

### Accessing the New Asset Page:

To access this feature, from the **Main Menu** select **Asset Management > New Asset**.

OR

From the **Main Menu** select **New > Asset**.

This feature can also be accessed from the [Asset List](#) by clicking the **New Record** button on the toolbar. For more information on using the list screens, please refer to the topic [Working with Lists](#).

The **New Asset** page is divided into several tabs as shown below:

### New Asset Page > General Tab

An example of the **General Tab** is shown in the screen shot above.

**Pinning:** You may notice that some fields on this and other tabs have a **Pin** icon in front of them. These fields represent data that can be "pinned". Pinning allows you to "lock" the information entered into a field. This is convenient if, for example, you are entering multiple new assets for a particular site and location. You can enter the site and location once, then pin them. The fields will retain the information you entered through each new entry until you unpin them. In the example screen shown below, values are entered in the Site, Location and Department Code fields. These three fields were **Pinned** by clicking on their pushpins, causing them to look like this.



Click the pushpin again to unlock the field to enter different information.

Click the **Pin All** icon to pin every field that offers the pinning feature. Click it again to undo pinning for all fields.

### To Create an Asset:

1. Enter information in the required fields. You must enter information in the Asset Tag, Asset Type, Site, and Location fields.

**Note:** If you are using [Automatic Asset Tags](#), you do not need to enter anything in the Asset Tag field. If the [Automatic Asset Tags](#) function is turned on (**Administration > Options** on the PC version of MobileAsset), the **Asset Tag** field will appear as follows:



The tag will be generated when you click the **Save** button or when you click the button next to the **Asset Tag** field.

2. When you select an **Asset Type**, the following screen will display:



Select **Yes** to populate fields with information from the Asset Type such as Check Out Length, Model Number, Vendor, etc. For example, if **Check Out Length** information is entered for the Asset Type, it will appear here.

If you have enabled the [Edit Inherited Asset Type Data](#) option on the **Options** screen, you can make changes to the information that is populated from the Asset Type. If this option is not enabled, these fields will be disabled and you will not be able to make changes.

If you do not want to incorporate information from the Asset Type, other than the Asset Type number and Description, click **No**.

3. The **Department Code**, **Serial No.**, **Condition**, **Hyperlink** and **Additional Info** fields are optional.

The **Hyperlink** field can be used to store a link to the manufacturer's website, or even to a location on your network. When a valid web address is entered in this field, the icon next to it will be enabled. Clicking the icon will open your web browser and access the website.

**Note:** When using the drop down lists to enter information in a field (Asset Type, Site, Location, etc.), the last few selections will appear in the list. If you want to search for an existing value, select **<More>** from that field's drop down list to access the List screen.

Use the vertical scroll bar to select a record from the List and click the List dialog's **Select** button.

4. Click **OK** if you are done entering information for this asset or click on another tab to proceed with entering more information.

---

### New Asset Page > Asset Linking Tab

**Asset Linking** is only available in the Professional and Enterprise versions of MobileAsset.

**Asset Linking**, also known as Asset Kitting, allows you to link two or more assets together to form one new asset. For example, the asset Mary's Computer may consist of 4 separate assets - CPU, Keyboard, Mouse and Monitor. These four individual assets are linked together to form one new asset, Mary's Computer. For a complete definition of **Asset Linking** and an example, please refer to the [Definitions](#) topic.

The **Asset Linking** tab allows you to create links:

The screenshot shows the 'Asset Linking' tab in the MobileAsset software. At the top, there is a status bar that says 'automatically assigned'. Below this is a tabbed interface with several tabs: 'General', 'Asset Linking' (which is selected), 'Depreciation', 'Picture', 'Attachments', 'Maintenance', 'Contracts', 'Transaction History', and 'Custom Fields'. In the 'Asset Linking' tab, there is a checkbox labeled 'Transact as Whole' which is checked. Below this, there is a 'Parent Asset:' field with a dropdown menu and a red pushpin icon. Underneath that is a 'Child Asset(s):' field with a large empty rectangular area. At the bottom right of this section are two buttons: 'Link' and 'Unlink'. At the very bottom of the window, there is a footer bar containing a 'Help' button, a 'Pin All' button with a red pushpin icon, a 'Print Tag On OK - Copies:' field with a value of '0' and a spinner, and 'OK' and 'Cancel' buttons.

1. The **Asset Tag** value entered on the **General** tab will be displayed at the top, but can still be edited, if desired.
2. If this asset is to be the **Parent**, or top-level asset, of this group, you can leave the **Parent Asset** field blank. If you want to give this asset a parent (for instance, if this asset is a monitor and you want to link to the asset Mary's Computer), select an asset from the drop down list in the **Parent Asset** field.

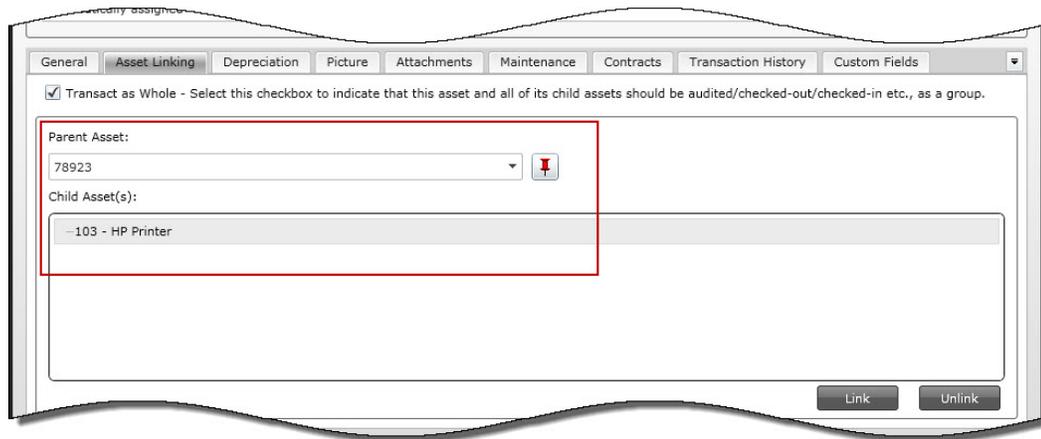
The asset can have a parent assigned to it and be a parent (have child assets assigned to it).

Select **<More>** from the drop down list to access the Asset List. Remember, you can filter the asset list to only display "Top Level" assets, or parent assets, if needed. See the [Working with Lists](#) topic for further information.

3. To associate child assets with this asset (the current asset will be the "parent" of these assets), click the Link button below the **Child Asset(s)** window. The **Asset List** will appear.

Highlight the desired asset in the Asset List, then click the **Select** button. The selected

asset will appear in the **Child Asset(s)** window as shown below:



In this example, asset number 78923 is the parent of the current asset and 103-HP Printer is the child.

**A Note about the Transact as Whole Flag:** In the example above, the **Transact as whole** flag is checked; therefore, any functions (check-in, check-out, audit, move, etc.) will be performed as a whole for the group. This flag is driven from the top down, meaning the selection made for the parent asset will override the selection for a child asset. If you want to move only one asset that is a child of this asset, you will need to deselect this checkbox. Deselecting it on the **Edit Asset > Asset Linking** tab for the child asset (in this case, Asset 103) will not override the selection made for this asset, and this group would still be moved as a whole. Similarly, if the **Transact as whole** flag was **NOT** selected on this tab, but it IS selected for Asset 78923 (the parent of this asset), the group would still be transacted as a whole because the selections made for the parent of this asset would take precedence. To put it another way, if you think of these relationships in the vein of child-rearing, one of your children may decide it is ok to borrow the car, but you as the parent do not think it is ok. Your decision as the parent would override that of the child.

Also keep in mind that when you check out an asset that has **Transact as whole** turned on and you select to use the **Default Due Date** (on the **Check Out** screen) MobileAsset will search all assets linked to the selected asset to find the maximum checkout duration. The program will use this maximum length to calculate the due dates for all the linked assets. This ensures that all the assets in the transaction have the same due date even if some of the linked assets have different checkout durations.

You can unlink child assets by highlighting the asset in the **Child Assets** list and clicking the **Unlink** button.

4. Click **OK** if you are done entering information for this asset or click another tab to proceed with entering more information.

---

**New Asset Page > Depreciation Tab:**

Click the **Depreciation** tab if you want the software to calculate depreciation for this asset. The method used by the system to calculate depreciation is dependent on the Asset Type assigned to this asset.

The **Asset Tag** value entered on the **General** tab will be displayed at the top, but can still be edited, if desired.

The screenshot shows the 'Depreciation' tab in the MobileAsset software. At the top, the 'Asset Tag' is 'Automatically assigned' and the 'Asset Description' is empty. The 'Depreciate Asset' checkbox is disabled and checked, with a message: 'Assets of this asset type cannot be depreciated.' Below this, there are fields for 'Purchase Order', 'Purchase Date', 'Purchase Cost' (0.00), and 'Salvage Value' (0.00). To the right, there are fields for 'Depreciation Begin Date', 'Last Depreciation Date', 'Total Depreciation', 'Current Depreciation', and 'Book Value'. The bottom of the window shows 'Print Tag On OK - Copies: 0' and 'OK' and 'Cancel' buttons.

1. Click the **Depreciate Asset** checkbox if you want the software to calculate depreciation. The **Depreciate Asset** checkbox will be disabled if a **Depreciation Class** has not been defined for the Asset Type specified on the **General** tab **-or-** that Asset Type has a **Depreciation Class**, but its **Depreciation Method** is "None".
2. **The depreciation method used for an asset is determined by the Depreciation Class assigned to the Asset Type.** This information appears in the **Class Info** box and cannot be modified from this screen. If you want to change the **Depreciation Method** or the **Life** of a particular asset, you will need to make changes to the **Depreciation Class** assigned to the Asset Type, or create a new **Depreciation Class** to assign to the Asset Type. See the **Depreciation Class** help topic for further information.
3. **Purchase Cost** and **Depreciation Begin Date** are required fields when **Depreciate Asset** has been enabled, therefore, you must complete them if you want to calculate depreciation. These two fields are used in the calculation. Please see the [Definitions](#) topic for detailed explanations of each **Depreciation Method**.
4. **Purchase Order**, **Purchase Date** and **Salvage Value** are optional fields. If a **Salvage Value** is not specified, the **Calculate Depreciation** function will assume a **Salvage Value** of zero dollars.

The **Class Info**, **Last Depreciation Date**, **Total Depreciation**, **Current Depreciation**, and **Depreciated Value** cannot be modified. Information is populated in these fields by the system as depreciation functions are performed.

In the following example, an asset is being entered that uses **5-year Straight-Line** depreciation:

The screenshot shows the 'Depreciation' tab of an asset management application. The interface includes several input fields and a summary box. On the left, there is a 'Depreciate Asset' checkbox which is checked. Below it are fields for 'Purchase Order', 'Purchase Date', 'Purchase Cost' (set to 899.00), and 'Salvage Value' (set to 0.00). A 'Class Info' box contains the following details: 'Class: 5 Year Straight Line', 'Depreciation Method: Straight-Line', and 'Life:'. On the right side, there are fields for 'Depreciation Begin Date' (7/14/2010), 'Last Depreciation Date', 'Total Depreciation', 'Current Depreciation', and 'Book Value'. The bottom of the window features a 'Help' button, a 'Pin All' button, a 'Print Tag On OK - Copies:' dropdown set to 0, and 'OK' and 'Cancel' buttons.

5. Click **OK** if you are done entering information for this asset or click the next tab to proceed with entering more information

---

### New Asset Page > Attachments Tab

To attach an image or other documentation to this Asset, click on the **Attachments** tab:

The screenshot shows the 'Attachments' tab of the same asset management application. The main area is a large empty box with two sub-sections: 'Asset Attachments' and 'Asset Type Attachments'. To the right of this box is a vertical column of buttons: 'View', 'Add', 'Remove', 'Set Default Image', and 'Save To File'. The bottom of the window features a 'Help' button, a 'Pin All' button, a 'Print Tag On OK - Copies:' dropdown set to 0, and 'OK' and 'Cancel' buttons.

1. To add an attachment, click the **Add** button.



A screen will appear allowing you to navigate to the desired file on your computer. Attachments are copied to the MobileAsset database from the external source you browse to when you click the **Add** button. Any change made to the external source file after adding the attachment will not update the attachment in the database. To update the database with a later version of an attached file, you must first **Remove** the attachment from the database, then **Add** the file again.

Asset **Attachments** relate only to the specific Asset being recorded. Asset Type **Attachments** relate to every Asset recorded for this Asset Type.

2. If you have attached an image, you can designate this the "default" image (meaning this is the image that will appear on the **Picture** tab) by clicking the **Set Default Image** button.
3. After you have added at least one file, the **View** button is enabled. This feature allows you to view the attached file. The **File Associations** defined in Windows Explorer determine which application will be started to open files, based on their filename extensions. On most machines, a PDF file would be opened by Adobe® Reader, for example. Image attachments can be viewed the same way or you can use the **Picture** tab to use Asset's internal image viewer.

The **Save to File** button copies the selected attachment from the database to any drive and folder available on your system.

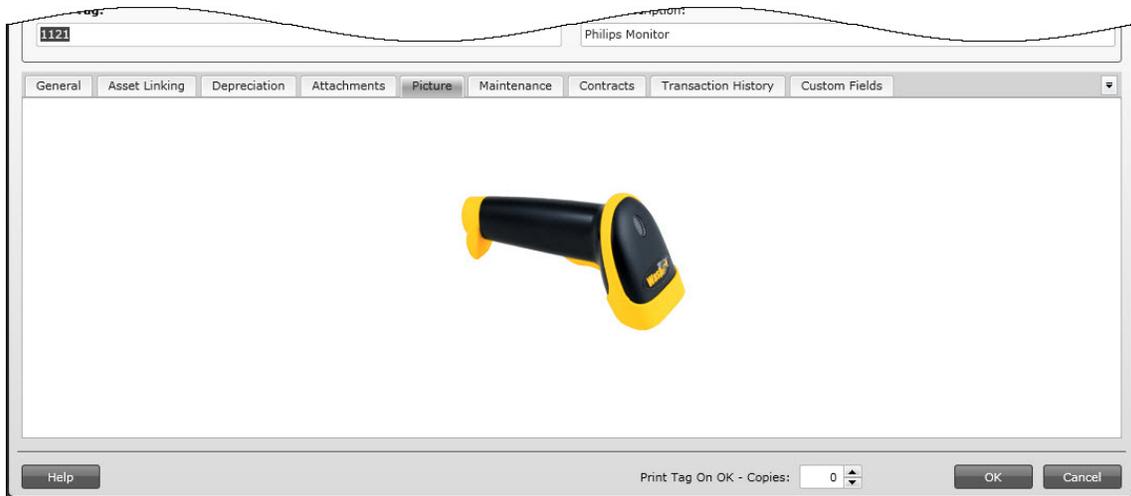
The **Remove** button can only be used to **Remove Asset Attachments**. It is grayed-out (disabled) when an Asset Type **Attachment** is selected. These Asset Type **Attachments** may be related to other Asset Tags under the same Asset Type. Asset Type **Attachments** can only be removed via the **Edit Asset Type Attachments** tab (see **Creating New Asset Types** for further information.).

4. Attachments are not actually added to the database until the **OK** button is clicked. You can click it at this time if you are finished adding additional information, or click it later, after you have completed information on other tabs.

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### New Asset Page > Picture Tab

Click the **Picture** tab to view any image files that have been attached to either the **Asset Type Attachments** folder or the **Asset Attachments** folder.



1. The first time you access this tab it will be blank if a default picture has not been added on the **Attachments** tab either on the **Add/Edit Asset** screen or the **Add/Edit Asset Type** screen (for the **Asset Type** assigned to this asset).

The current default picture is always displayed on the **Picture** tab. Right click the image to see the popup **Picture** menu. This menu allows you to **Add** (a new) Image or to **Select** (a previously added) Image. Any image you select for display will become the new default image.

The files listed in the **Select Image** sub-menu are a combination of Asset Type Attachment images and Asset Attachments images, sorted alphabetically, by filename.

2. Image files are not actually added to the database until the **OK** button is clicked. You can click it at this time if you are finished adding additional information, or click it later, after you have completed information on other tabs.

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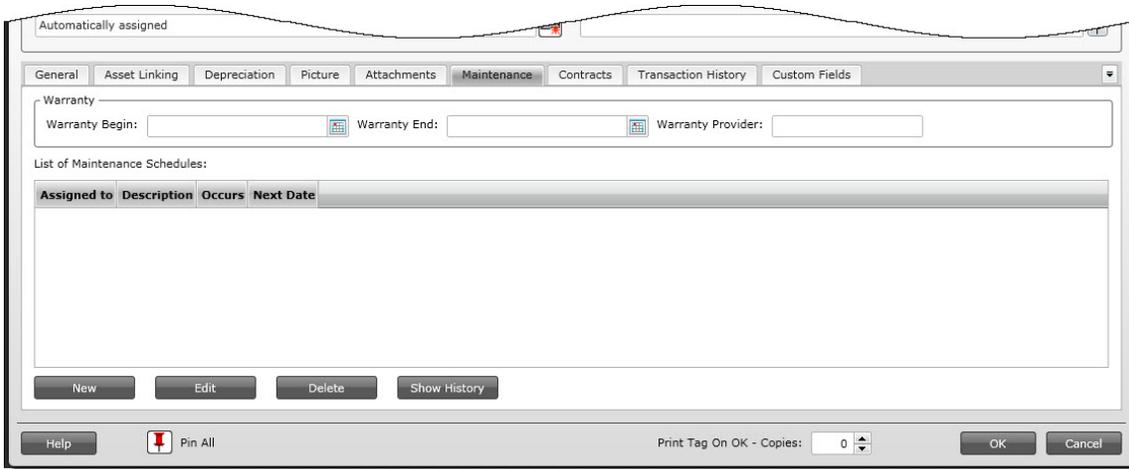
### New Asset Page > Maintenance Tab

The **Maintenance** tab allows you to define maintenance procedures, a maintenance schedule, and warranty information for an Asset.

This tab allows you to:

- [Enter Warranty Information](#)
- [Enter New Maintenance Schedules](#)
- [Edit Existing Maintenance Schedules](#)
- [View Maintenance History](#)

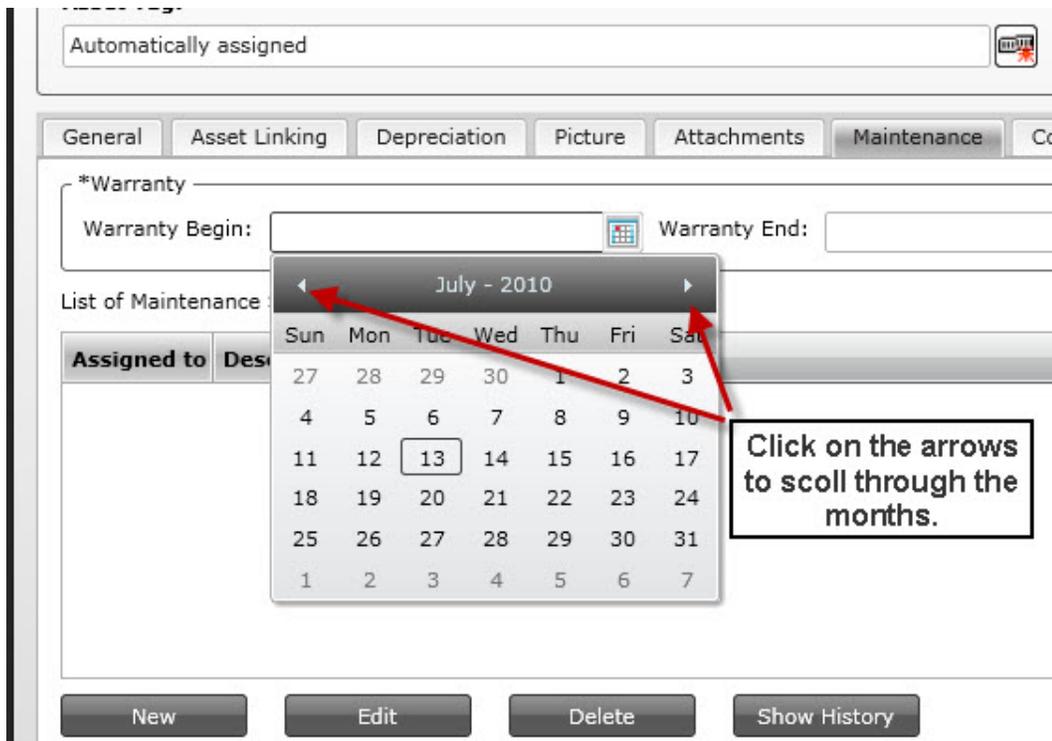
Below is an example of the **Maintenance** tab:



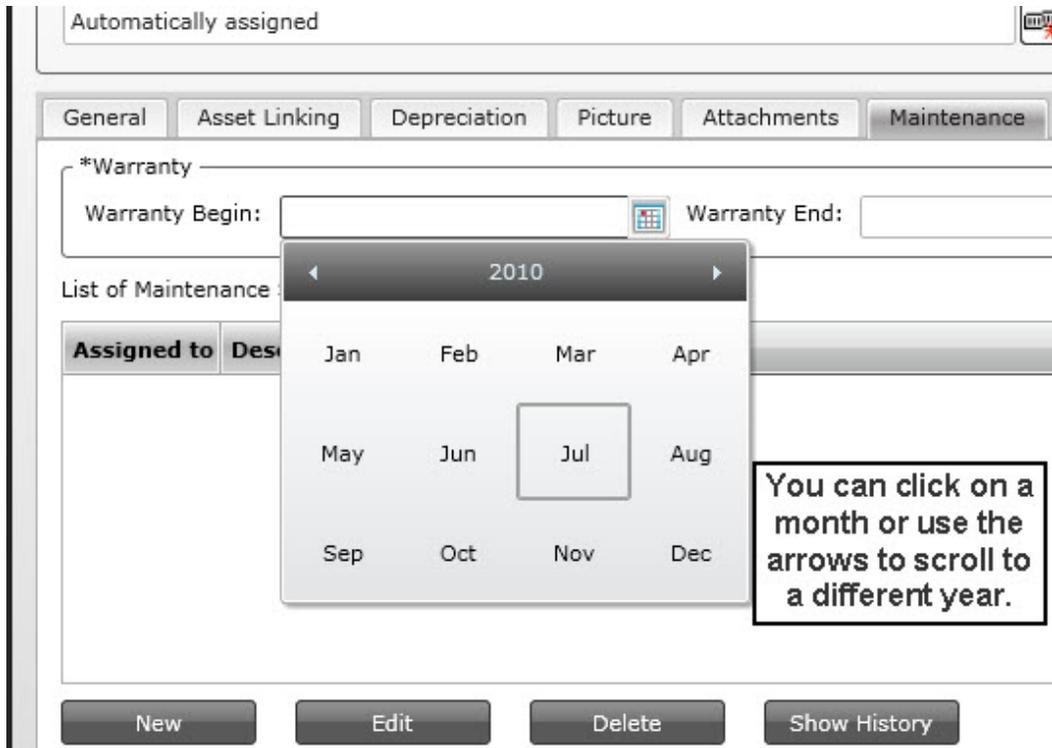
**Entering Warranty Information:**

- 1. You can optionally enter **Warranty Begin** and **End** dates and a **Warranty Provider** at the top of this tab.

Click on the **Calendar** icon to access the calendar feature:



You can also click on the **Month/Year** (August, 2009 in the example above) to view a list of all months. You can then click on a month to quickly switch dates:

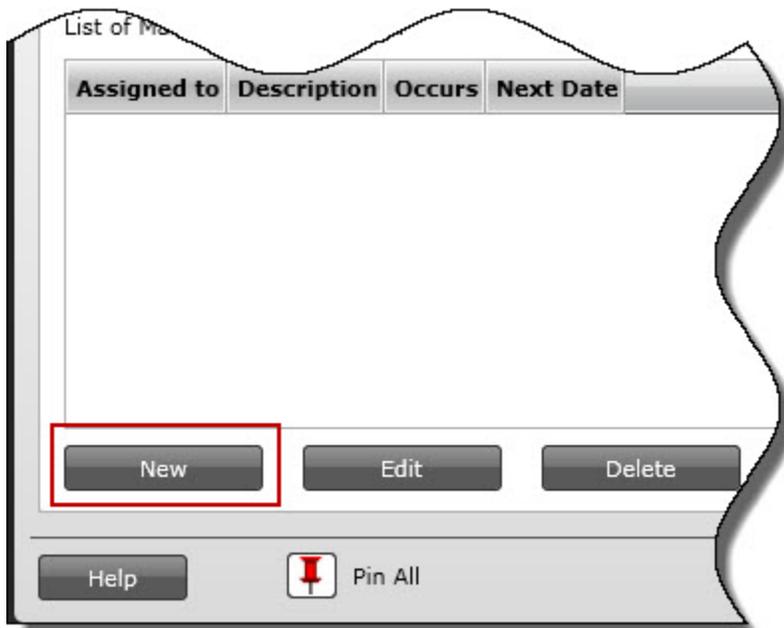


2. You can optionally enter the warranty provider in the Provider field.

**Entering New Maintenance Schedules:**

To enter a new maintenance schedule:

1. Click the **New** button below the window:



The **Maintenance Schedule** screen appears:

The screenshot shows a window titled "Maintenance Schedule" with a yellow header. The window contains the following fields and controls:

- Maintenance Name:** A text input field.
- Assign to:** A dropdown menu.
- Occurs:** A dropdown menu currently showing "Date".
- Date:** A text input field containing "7/13/2010" with a calendar icon to its right.
- Next Date:** A text input field containing "Tuesday, July 13, 2010".
- Instructions:** A large, empty text area.
- Buttons:** "Help", "Save", and "Cancel" buttons are located at the bottom of the window.

2. Enter a name for this maintenance schedule.
3. Select the employee who this asset will be assigned to from the **Assigned To** drop down list. All employees currently set up in your software will appear in the drop down list.
4. Select how often this maintenance schedule is to happen from the **Occurs** drop down list. The area below the **Occurs** drop down list will change depending on the selection you make here. Your options are:
  - **Date** - This option indicates a one-time maintenance procedure. When you select this option, a **Date** field will appear below the **Occurs** drop down list. Select the date on which the maintenance should take place. You can click on the calendar icon to select a date or type a date directly into the field.

## Adding Information

Occurs: Date

Date: 7/13/2010

Next Date: Tuesday, July 13, 2010

- **Daily** - This option allows you to specify a **Maintenance Start** date, followed by a frequency specified as Every x number of days (up to a maximum of every 366 days).

In this example, maintenance would be performed every 10 days beginning Tuesday, July 13, 2010.

Occurs: Daily

Daily

Maint Start: 7/13/2010

Every 10 day(s)

Next Date: Tuesday, July 13, 2010

The **Next Date** at the bottom of the screen indicates the next date maintenance will be performed on this asset.

- **Weekly** - This option allows you to specify a **Maintenance Start** date, followed by the frequency specified as Every x number of weeks. You will also select the days of the week on which the maintenance is to be performed. More than one weekday can be selected.

In this example, maintenance will be performed every week on Fridays beginning July 16, 2010.

Occurs: Weekly

Weekly

Maint Start: 7/16/2010

Every 1 week(s) on:

Sun  Mon  Tue  Wed

Thu  Fri  Sat

Next Date: Friday, July 16, 2010

The **Next Date** at the bottom of the screen indicates the next date maintenance will be performed on this asset. In this example, since we have selected Friday

as the maintenance day, the **Next Date** is Friday, July 16, 2010.

- **Monthly** - This option allows you to specify a **Maintenance Start** date, followed by your choice of two possibilities: Maintenance Every x number of months (up to a maximum of every 99 months) as shown below:

In this example, maintenance will occur on the 1st day of each month every month.

Occurs: Monthly

Monthly

Maint Start: 7/16/2010

Day 1 of every 1 month(s)

of every 1 month(s)

Next Date: Sunday, August 01, 2010

Notice the **Next Date** reflects the first day of the next month.

**OR**

Maintenance can be set to occur on a specific weekday of every x number of months (up to a maximum of every 99 months) as shown below:

Occurs: Monthly

Monthly

Maint Start: 7/16/2010

Day 1 of every 1 month(s)

1st Thursday of every 1 month(s)

Next Date: Thursday, August 05, 2010

In this example, maintenance will occur on the first Thursday of every month.

Notice the **Next Date** reflects the first Thursday of the next month from the **Start Date**.

- **Disable** - This option is used when you want to temporarily disable an existing maintenance schedule. Highlight the maintenance schedule in the list, then click **Edit**. On the **Maintenance Schedule** screen, select **Disabled** from the **Occurs** drop down box. You can also set up a new maintenance schedule as **Disabled** then enable it later by select **Daily**, **Weekly**, etc.
5. Click **Save** when you are done entering information for this maintenance schedule. The schedule will appear in the list on the **Maintenance** tab:

Warranty

Warranty Begin:   Warranty End:

List of Maintenance Schedules:

Assigned to	Description	Occurs	Next Date
Bradley, Pittsburg	Battery Replacement	Monthly	7/13/2010

New Edit Delete Show History

Help  Pin All

#### Editing Existing Maintenance Schedules:

1. Highlight the maintenance entry you want to edit, then click the **Edit** button. The **Maintenance Schedule** screen will appear populated with the selected entry's information.
2. Make changes as necessary, then click the **Save** button. The edited entry will appear in the list on the **Maintenance** tab.

#### Viewing Maintenance History:

The **Maintenance History** screen displays all completed maintenance on this asset.

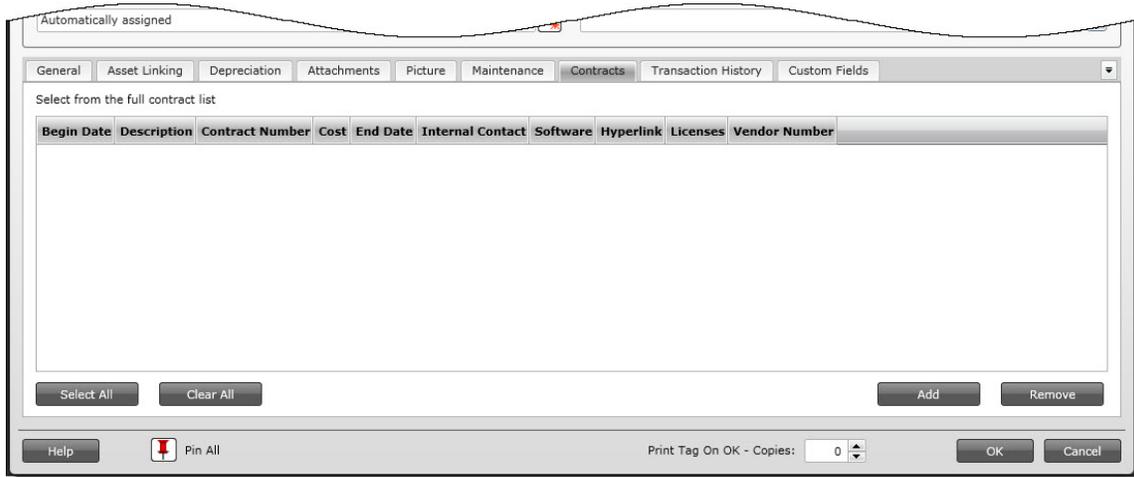
1. Click the **View History** button. The **Maintenance History** screen will appear:  
<SS>
2. When you first access this screen, all maintenance entries associated with the selected maintenance schedule are displayed. You can change the selected schedule using the **Schedule** drop down menu. You can also enter **From** and **To** dates to further filter the list.
3. Click the **Show All** button to remove the filter.
4. Select the **Print History** button to print a list of the displayed maintenance entries.

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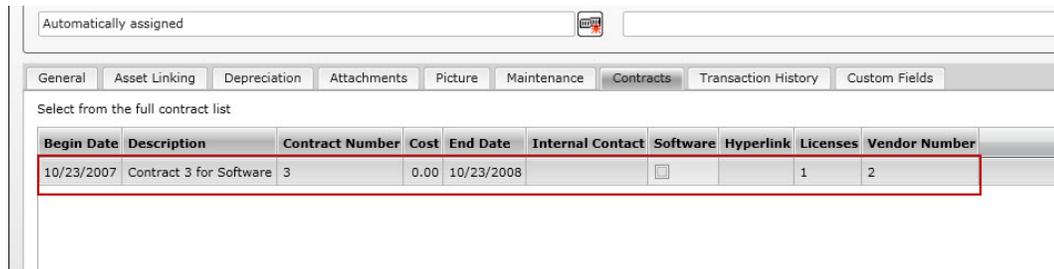
#### New Asset Page > Contracts Tab

The **Contracts** tab allows you to record contract and/or software licenses associated with this asset. The tab will appear empty when you are first adding a new asset. You can add contracts

and licenses to this asset as needed from this tab. Contracts/licenses can be added to the database via the **Contracts List** screen.



1. To add a contract/license, click the **Add** button. The **Contracts List** will appear. Select the desired contract from the list, then click **Select** on the **Contracts List** screen. The selected contract will appear on the **Contracts** tab as shown in the example below:

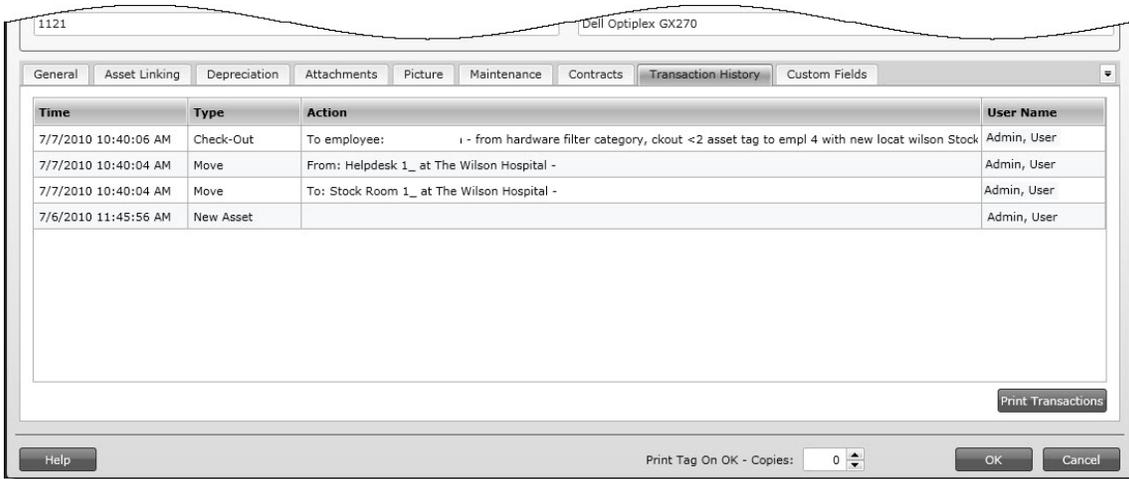


2. You can remove a contract by highlighting it in the window, then clicking the **Remove** button.  
  
Click **Select All** to select all contracts in the window.  
  
Click **Clear All** to deselect all contract in the window.
3. Click **OK** if you are done entering information for this asset or click the next tab to proceed with entering more information

---

## New Asset Page > Transaction History Tab

The **Transaction History** tab displays data only after one or more **Asset Management** transactions have been performed (check-in, check-out, etc.). Keep in mind that this tab will be blank when you are setting up a new asset. The example below shows the **Transaction History** tab as it might appear on the **Edit Asset** screen.

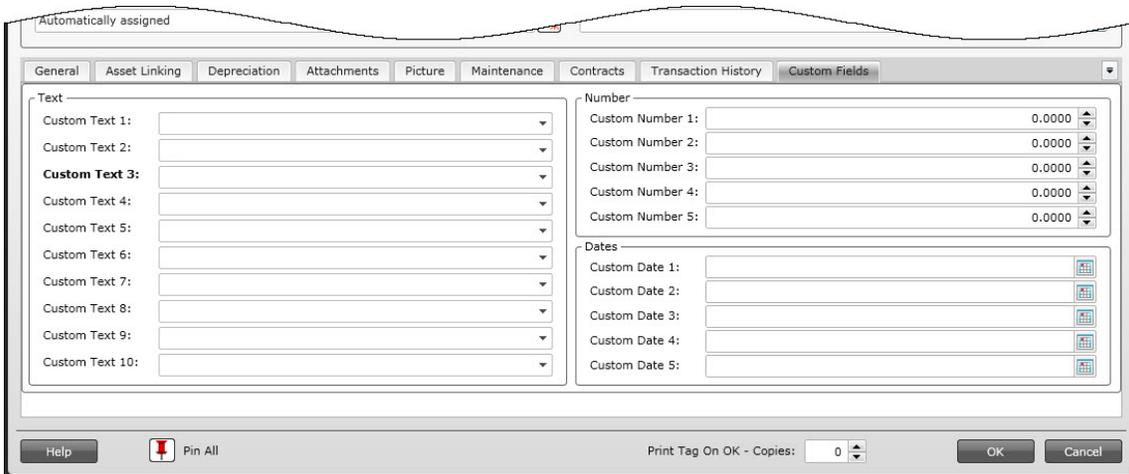


Click **Print Transactions** to send a list of the transactions for this asset to the printer.

Click **OK** if you are done entering information for this asset or click another tab to proceed with entering more information.

### New Asset Page > Custom Fields Tab

Please refer to the **Using Custom Fields** topic for instructions on creating custom text, number and date fields.



If the **Close New Form** option is enabled on the **Options** screen and no fields are pinned, the screen will close when the **OK** button is clicked.

## Create New Asset Type

The **Create New Asset Type** screen allows you to enter a new **Asset Type** in the database. The asset type is a category for assets. Assets are assigned to a specific asset type. For instance, you may have an **Asset Type** of Label Printers that defines the manufacturer, size specs, etc. of this particular type of printer. Then specific printers of the same type are assigned to the Label Printers asset type.

[Accessing the New Asset Type Screen](#)

[Using the General Tab](#)

[Using the Attachments Tab](#)

[Using the Picture Tab](#)

[Using the Custom Fields Tab](#)

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### Accessing the New Asset Type Screen

1. To access the screen from the **Main Menu**, click **New > Asset Type**.

The **New Asset Type** screen can also be accessed from the **Asset Type List** by clicking the **New** button on the toolbar. For more information on using the **List** screens, see the [Working with Lists](#) topic.

2. Complete the information on the screen. The **New Asset Type** screen is divided into tabs: General, Attachments, Picture, Custom Fields

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### New Asset Type Screen > General Tab

The screenshot shows a 'New Asset Type' dialog box with the following fields and sections:

- Asset Type:** Text input field.
- Description:** Text input field.
- General Tab:**
  - Manufacturer:** Dropdown menu.
  - Model:** Text input field.
  - Vendor Number:** Dropdown menu.
  - Depreciation Class:** Dropdown menu.
  - Category:** Dropdown menu.
  - Checkout Length:** Three spinner boxes for days, hours, and minutes.
  - Lead Time:** Three spinner boxes for days, hours, and minutes.
  - Hyperlink:** Text input field.
- Dimensions Section:**
  - Length:** Text input field.
  - Width:** Text input field.
  - Height:** Text input field.
  - Weight:** Text input field.
- Buttons:** 'Help', 'Save', and 'Close' buttons at the bottom.

1. Enter the name of the Asset Type in the **Asset Type** field.. All other fields, including **Description**, are optional.

Asset Types must be unique across all **Sites** and **Locations**. A particular value can occur only once in the software database.

- Select a **Manufacturer** from the drop down list or create a new one by entering the new value and clicking **OK** to launch the [Create New Manufacturer](#) screen.
- Enter a **Model** name or number for the Asset Type.
- Select a **Vendor Code** from the drop down list or create a new one by entering the new value and clicking **OK** to launch the [Create New Vendor](#) screen.
- Select a **Class** from the drop down list or create a new one by entering the new value and clicking **OK** to launch the [Create New Depreciation Class](#) screen.
- Select a **Category** from the drop down list or create a new one by entering the new value.
- Optionally enter the **Length**, **Width**, **Height** and/or **Weight** for this Asset Type. These are text fields in which the units of measure can be specified along with the dimension or weight. (5 mm, 10 in, 3 lbs, etc.)
- **Checkout Length** specifies the default period, in days, that assets assigned to this Asset Type may be checked-out to a customer or an employee. Keep in mind that you can set the check out length to only consider weekdays and the due date to only fall on a weekday on the **Options** screen.

- **Lead Time** indicates how long after an asset is received, checked in, etc. before it is available. The lead time allows time for recalibration, cleaning, etc.
- The **Hyperlink** field can be used to store a link to the manufacturer's website, or even to a location on your network. When a valid web address is entered in this field, the icon next to it will be enabled. Clicking the icon will open your web browser and access the website.
- If you want to search for an existing value, select **<More>** from that field's drop down list to open the relevant **List** screen. Use the vertical scroll bar to select a record from the List and click the List screen's **Select** button.

---

### New Asset Type Screen > Attachments Tab

To attach an image or other documentation for this **Asset Type**, click on the **Attachments** tab:



1. To add an attachment, click the **Add** button. A screen will appear allowing you to navigate to the desired file on your computer. Attachments are copied to the MobileAsset Web database from the external source you browse to when you click the **Add** button. Any change made to the external source file after adding the attachment will not update the attachment in the database. To update the database with a later version of an attached file, you must first **Remove** the attachment from the database, then **Add** the file again.
2. If you have attached an image, you can designate this the "default" image (meaning this is the image that will appear on the **Picture** tab) by clicking the **Set Default Image** button.

3. After you have added (and saved) at least one file, the **View** button is enabled. This feature allows you to view the attached file. The **File Associations** defined in Windows Explorer determine which application will be started to open files, based on their filename extensions. On most machines, a PDF file would be opened by Adobe® Reader, for example. Image attachments can be viewed the same way or you can use the **Picture** tab to use MobileAsset Web's internal image viewer.

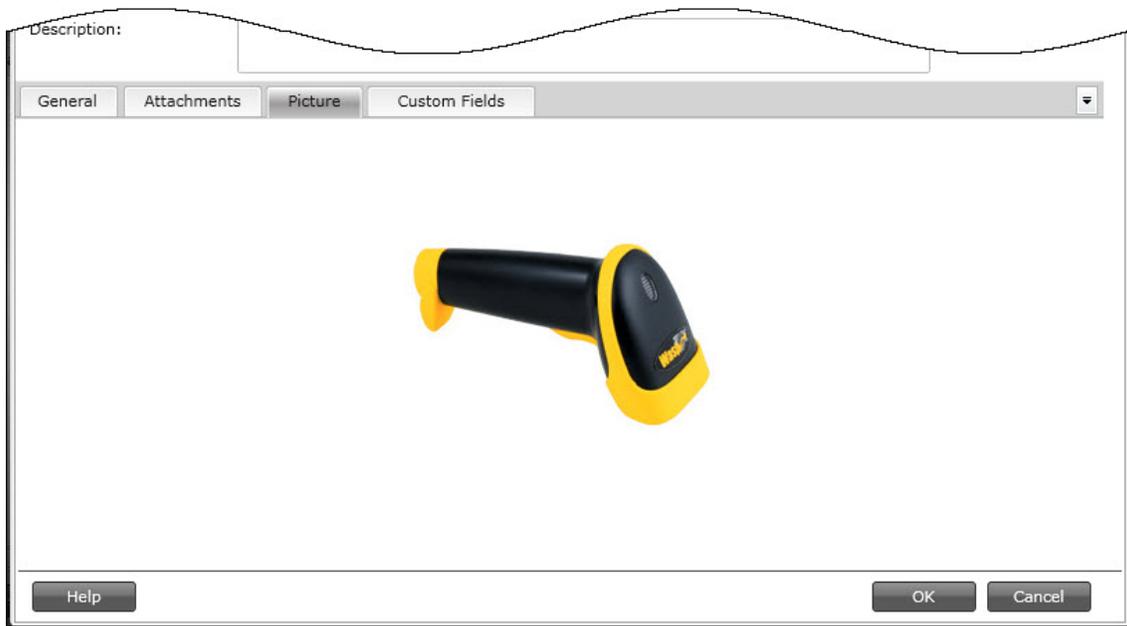
The **Save to File** button copies the selected attachment from the database to any drive and folder available on your system.

4. Attachments are not actually added to the database until the **OK** button is clicked. You can click it at this time if you are finished adding additional information, or click it later, after you have completed information on other tabs.

---

### New Asset Type Screen > Picture Tab

Click the **Picture** tab to view any image files that have been attached to this Asset Type.



1. The current default **Picture** is always displayed on the **Picture** tab. Right click the image to see the popup **Picture** menu. This menu allows you to **Add** (a new) Image or to **Select** (a previously added) Image. Any image you select for display will become the new default image.

The files listed in the **Select Image** sub-menu are a combination of **Asset Type Attachment** images and **Asset Attachments** images, sorted alphabetically, by filename.

2. Image files are not actually added to the database until the **OK** button is clicked. You can click it at this time if you are finished adding additional information, or click it later, after you have completed information on other tabs.

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**New Asset Type Screen > Custom Fields Tab**

Description:

General Attachments Picture Custom Fields

Text

Custom Text 1:

Custom Text 2:

Custom Text 3:

Custom Text 4:

Custom Text 5:

Custom Text 6:

Custom Text 7:

Custom Text 8:

Custom Text 9:

Custom Text 10:

Number

Custom Number 1:

Custom Number 2:

Custom Number 3:

Custom Number 4:

Custom Number 5:

Dates

Custom Date 1:

Custom Date 2:

Custom Date 3:

Custom Date 4:

Custom Date 5:

Help OK Cancel

Please refer to the [Using Custom Fields](#) topic for instructions on creating custom text, number and date fields.

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## Create New Contract/License

Contracts/Licenses can be entered into the database so you can associate them with specific assets. For example, you may have 15 licenses for Microsoft Windows and each license is assigned to a different computer. You can track which assets those licenses are tied to by associating the license with the assets on the **New/Edit Asset** screens.

1. To create a new contract/license, from the **Main Menu**, click **New > Contract/License**.

The **New Contract** screen can also be accessed from the **Contract List** by clicking the **New Record** button on the toolbar. For more information on using the **List** screens, see the [Working with Lists](#) topic.

2. Complete the requested information at the top of the page.

When you enter a **Vendor**, the icon next to the field is enabled as shown below:

Click on this icon to open the **Edit Vendor** page so you can view this vendor's information.

You can optionally enter a hyperlink for this vendor. This can be a hyperlink to the vendor's website or to a document stored on your network. **Cost** is also an optional field. You can enter cost here, but keep in mind it is not tracked in MobileAsset.

3. You can associate assets with this contract/license by clicking the **Associate** button. The **Asset List** appears. Highlight the desired listing, then click the **Select** button on the **Asset List**. The selected asset appears in the **Associated Assets** grid as shown below:

The screenshot displays a software interface for managing assets. At the top, there are input fields for 'Hyperlink:' and 'Cost:' with a '0.00' value. Below these is a section titled 'Associated Assets' containing a table with the following headers: 'Asset Tag', 'Asset Type', 'Asset Type Description', 'Site', and 'Location'. The table is currently empty. Below the table are three buttons: 'Associate Asset' (highlighted with a red box), 'Remove Asset', and 'Asset Details'. At the bottom of the interface are 'Help', 'Save', and 'Close' buttons.

You can remove an asset by highlighting it in the grid and clicking the **Remove** button.

If you associate an asset to a contract/license from this screen, this contract will display on the asset's **Edit Asset screen > Contracts** tab.

4. Click **OK** save your changes.
-

## Create New Customers

The **Create New Customer** page, allows you to enter a new customer into the database. Assets can then be checked-out to that customer.

1. To access this screen, from the **Main Menu** click **New > Customer**. The **New Customer** page appears

The **New Customer** page can also be accessed from the **Customer List** by clicking the **New Record** button on the toolbar. For more information on using the **List** screens, see the [Working with Lists](#) topic.

In addition, the **New Customer** screen can also be opened automatically from the Check-Out screen if an unknown Customer is entered.

Below is an example of the **New Customer** screen.

2. Complete the information on the screen. Only the **Customer No.** and **Address Type** fields are required.

Select an **Address Type** from the drop down list, then provide any of the associated information you have for this customer: **Address 1**, **Address 2**, **Mail Stop**, **City**, **State**, **Postal Code** and **Country**. Address information can be entered for each **Address Type** you select.

3. The **Additional Information** tab provides optional fields where other information about the Customer can be recorded: **Phone**, **Extension**, **Fax**, **Cell No.**, **Home No.**, **Email**

and **Notes**.

**Notes** is a text field available to record any additional information you might have about this Customer. See the **Notes** topic.

The screenshot shows a dialog box titled "New Customer" with a yellow header bar. It has three tabs: "General Information", "Additional Information", and "Custom Fields". The "Additional Information" tab is selected. The form contains the following fields:

- Phone: [text box]
- Extension: [text box]
- Fax: [text box]
- Cell Phone: [text box]
- Home No: [text box]
- Email: [text box]
- Notes: [large text area]

Below the Notes field is an "Add Note" button. At the bottom of the dialog are three buttons: "Help", "OK", and "Cancel".

For information about the **Custom Fields** tab, see **Using Custom Fields**.

4. When the [Close New Form](#) option is turned off: Click **Save** to commit your entry or click **Close** to exit the form.

When the **Close New Form** option is turned on: Click **OK** to commit your entry and exit the form or **Cancel** to exit the form without saving your entry.

---

## Create New Department

The **Create New Department** screen allows you to enter a new **Department** to which an asset and/or employee is assigned.

1. To access this page from the **Main Menu** select **New > Department**.

The **Create New Department** page can also be accessed from the **Department List** by clicking the **New Record** button on the toolbar. For more information on using the Lists, see the [Working with Lists](#) topic.



The screenshot shows a dialog box titled "New Department". It contains a large text area for the department name, followed by two input fields labeled "Department Code:" and "Department Name:". At the bottom, there are three buttons: "Help", "Save", and "Close".

2. Complete the fields on this screen. All fields are required. (Example: "GA" and "Graphic Arts")
  3. Click **OK** after entering information to save the new record.'
-

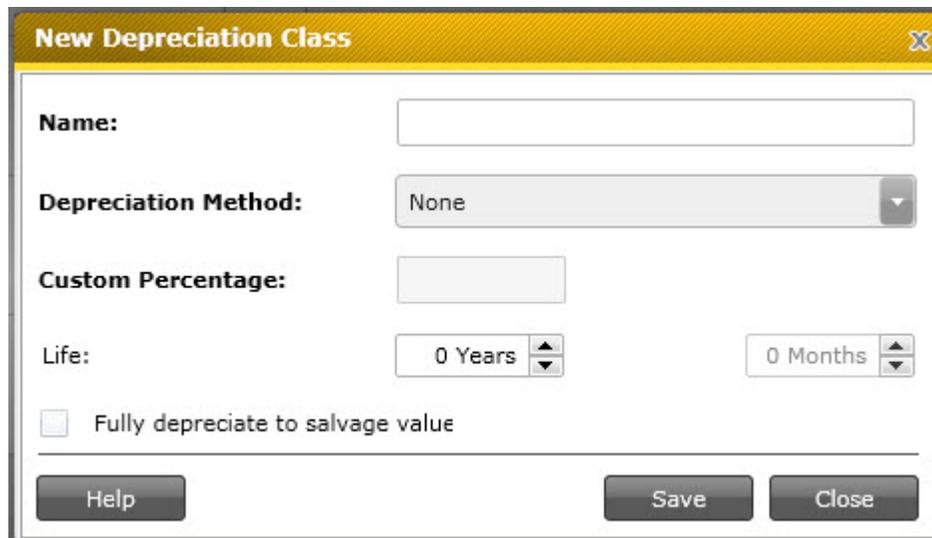
## Create New Depreciation Class

The **Create New Depreciation Class** page allows you to specify what **Depreciation Method**, if any, should be used to calculate depreciation for an Asset Type associated with the **Class**, and for what period.

**Note:** While you can create depreciation classes to assign to asset types in MobileAsset, the **Calculate Depreciation** feature is only available in the software version of MobileAsset.

1. To access this screen from the **Main Menu** click **New > Depreciation Class**.

The **Create New Depreciation Class** page can also be accessed from the **Depreciation Class List** by clicking the **New Record** button on the toolbar. For more information on using the **List** screens, see the [Working with Lists](#) topic.



2. Complete the fields on this screen. **Name** and **Depreciation Method** are required fields.

It is a good idea to use a descriptive Class name that incorporates some indication of the depreciation method and the Years/Months you intend to specify for depreciation classes (with Depreciation Method other than None). (Examples: DepNone, DepSL5yr, DepSL1yr6mo, etc.)

Select the depreciation method you would like to use from the **Depreciation Method** drop down menu. Selecting **None** from the list specifies that depreciation is not to be calculated for Asset Types of this **Class**. Please refer to the [Definitions](#) section for detailed definitions of each depreciation type.

**Fully depreciate to salvage value option:** If you select **Double Declining**, **Custom** or **150% Declining**, the **Fully depreciate to salvage value** option will be enabled. Leave this checkbox selected (default) if you want MobileAsset to fully depreciate your assets to the salvage value.

Example: Assume you select double declining balance over five years, and enter a salvage value (entered on the Create New Asset screen) of \$20.00. Assume that after 4 years, following the double declining balance method, the asset may have depreciated to

\$40.00. In this situation, if this checkbox is selected, MobileAsset will lower the value of the asset to the salvage value - \$20.00 in this case - at year 4 despite what the actual depreciated value is.

Uncheck the Fully Depreciate option if you do not want MobileAsset to fully depreciate the asset.

3. Click **OK** when you have completed the screen.

If any method other than **None** has been selected, information must be entered in the **Years** and/or **Months** fields.

---

## Create New Employee

The **New Employee** page allows you to enter a new employee into the database. Employees, like customers, can have assets checked-out to them.

[Accessing the New Employee Page](#)

[Using the General Tab](#)

[Using the Attachments Tab](#)

[Using the Picture Tab](#)

[Using the Transaction History Tab](#)

[Using the Custom Fields Tab](#)

---

### Accessing the New Employee Page:

1. To access the screen from the **Main Menu** click **New > Employee**.

The **New Employee** page can also be accessed from the **Employee List** by click the **New Record** button on the toolbar. For more information on using the **Lists**, see the [Working with Lists](#) topic.

In addition, it can also be opened automatically from the **Check-Out** screen if an unknown **Employee** is entered.

2. The **First Name**, **Last Name**, **Employee No.**, and **Address Type** fields are required and must be completed. The remaining fields are optional.
3. The **New Employee** page is divided into tabs: **General**, **Attachments**, **Picture**, **Transaction History**, **Custom Fields**.

---

### New Employee Screen > General Tab

The screenshot shows a 'New Employee' form with a yellow header bar. The form is divided into several sections. At the top, there are fields for 'First Name', 'Last Name', 'Employee No.', and 'Title'. Below this is a tabbed interface with tabs for 'General', 'Attachments', 'Picture', 'Transaction History', and 'Custom Fields'. The 'General' tab is active, showing fields for 'Department', 'Manager No.', 'Phone Type' (set to 'Work Phone'), 'Phone', 'Ext.', 'Email', 'Address Type' (set to 'Work Address'), 'Address 1', 'Address 2', 'Mail Stop', 'City', 'State', 'Postal Code', 'Country', and 'Notes'. At the bottom of the form are three buttons: 'Help', 'Save', and 'Close'.

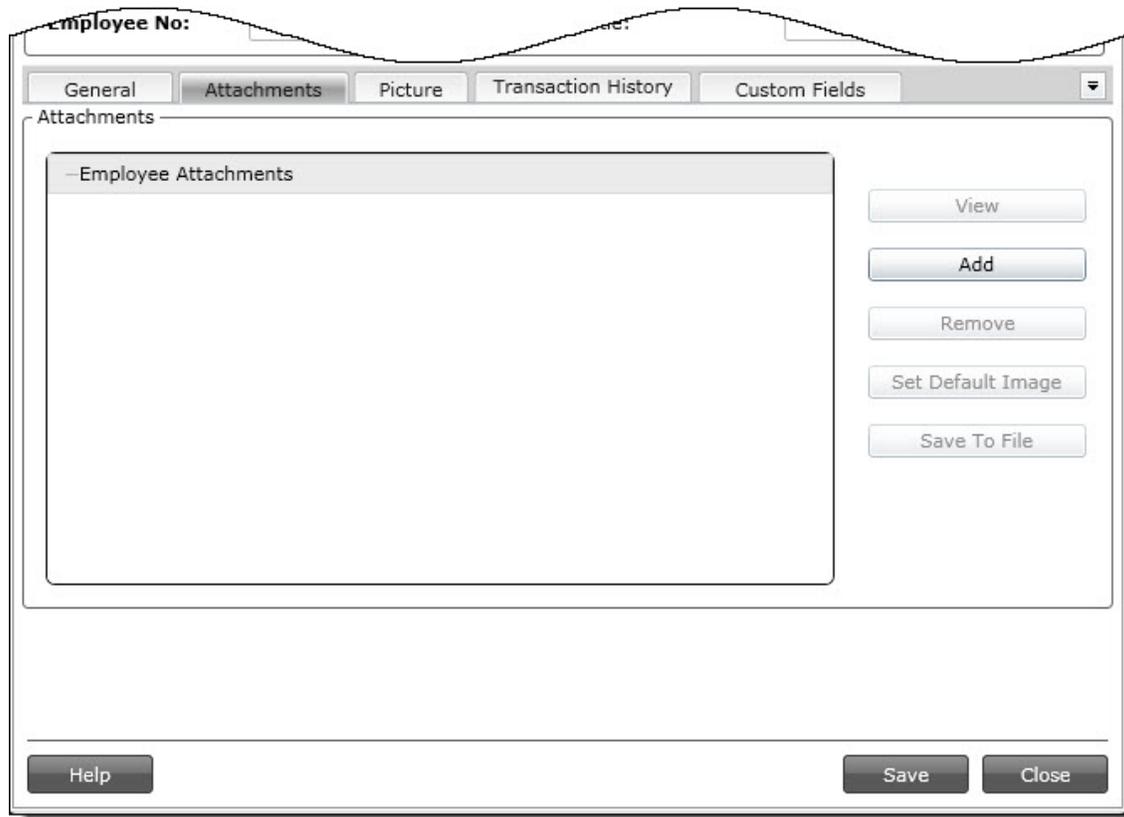
If you intend to use the optional **Manager** field when creating one or more **Employees**, you must create all the manager **Employees** ahead of non-manager **Employees**, working through your organizational chart from the top down.

Select an **Address Type** from the drop down list, then provide any of the associated information you have for this **Employee**. Address information can be entered for each **Address Type** you select.

---

### New Employee Screen > Attachments Tab

To attach an image or other documentation for this Employee, click on the **Attachments** tab:



### Adding Attachments:

1. To add an attachment, click the **Add** button. A browser window will appear allowing you to navigate your computer to find the desired file.

If you are adding a picture, and want to make it the "default" image (the image that displays first on the **Picture** tab) click the **Set Default Image** button.

2. Click **Save** to add the file.

Attachments are copied to the MobileAsset database from external sources you browse to when you click the **Add** button. Any change made to the external source file after adding the attachment will not update the attachment in the database. To update the database with a later version of an attached file, you must first remove the attachment from the database, then add the file again.

### Viewing Attachments:

To view an attachment that is already attached to the employee record, click the **View** button. The File Associations defined in Windows Explorer determine which application will be started to open files, based on their filename extensions. On most machines, a PDF file would be opened by Adobe® Reader, for example. Image attachments can be viewed the same way or you can use the **Picture** tab to use MobileAsset's internal image viewer.

### Removing Attachments:

To remove an attachment from the database, highlight the item in the **Attachments** window, then click **Remove**.

### Saving to File:

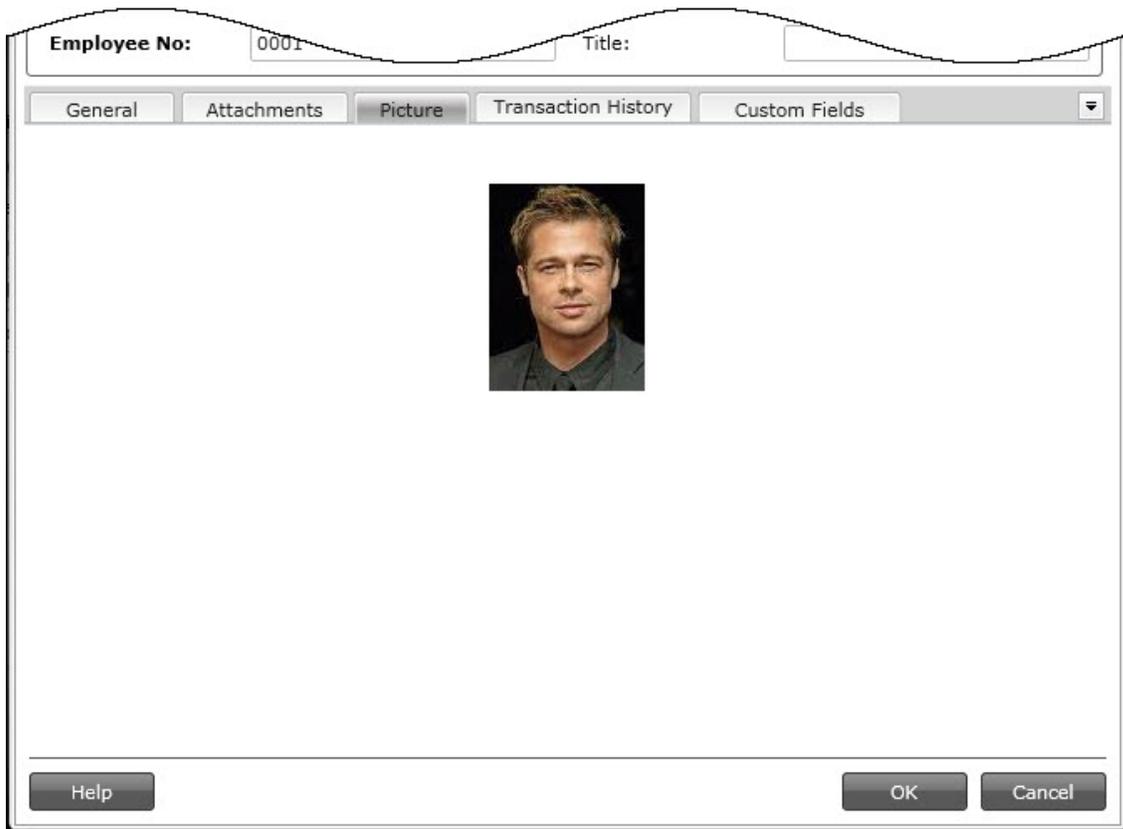
The **Save to File** button copies the selected attachment from the database to a location you specify on your computer.

**Note:** Attachments are not actually added to the database until the **OK** button is clicked.

---

### New Employee Screen > Picture Tab

Click the **Picture** tab to view any image files that have been attached to this employee.



The current default picture is always displayed on the **Picture** tab. Right click the image to see a pop up menu. This menu allows you to **Add** (a new) **Image** or to **Select** (a previously added) **Image**. Any image you select for display will become the new default image.

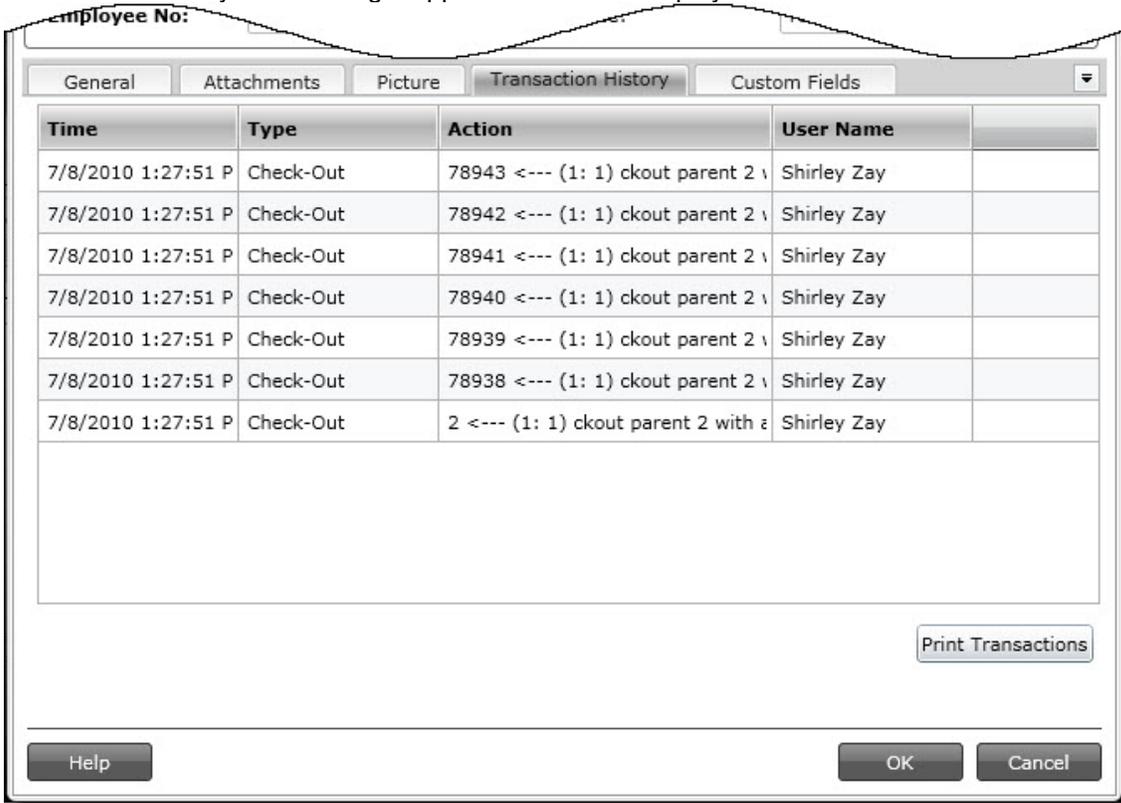
The files listed in the **Select Image** sub-menu are sorted alphabetically, by filename. (In the example shown, only one image file has been attached to this **Employee** record.)

**Note:** Image files are not actually added to the database until the **OK** button is clicked.

---

### New Employee Screen > Transaction History

The **Transaction History** tab displays the assets check-out to the employee and any assets the employee previously had checked-out that have been checked back in. Keep in mind that this tab will be blank when you are setting up a new employee. The example below shows the Transaction History tab as it might appear on the Edit Employee screen.



You can print a list of these transactions by selecting the **Print Transactions** button.

---

### New Employee Screen > Custom Fields

The screenshot shows a software window with a title bar and several tabs. The 'Employee No.' field contains the value '3' and the 'Title' field contains 'Tester'. The 'Custom Fields' tab is active, showing three sections: 'Text' with 10 dropdown menus labeled 'Custom Text 1' through '10'; 'Number' with 5 numeric input fields labeled 'Custom Number 1' through '5', each containing '0.0000'; and 'Dates' with 5 date picker fields labeled 'Custom Date 1' through '5'. At the bottom of the window are three buttons: 'Help', 'OK', and 'Cancel'.

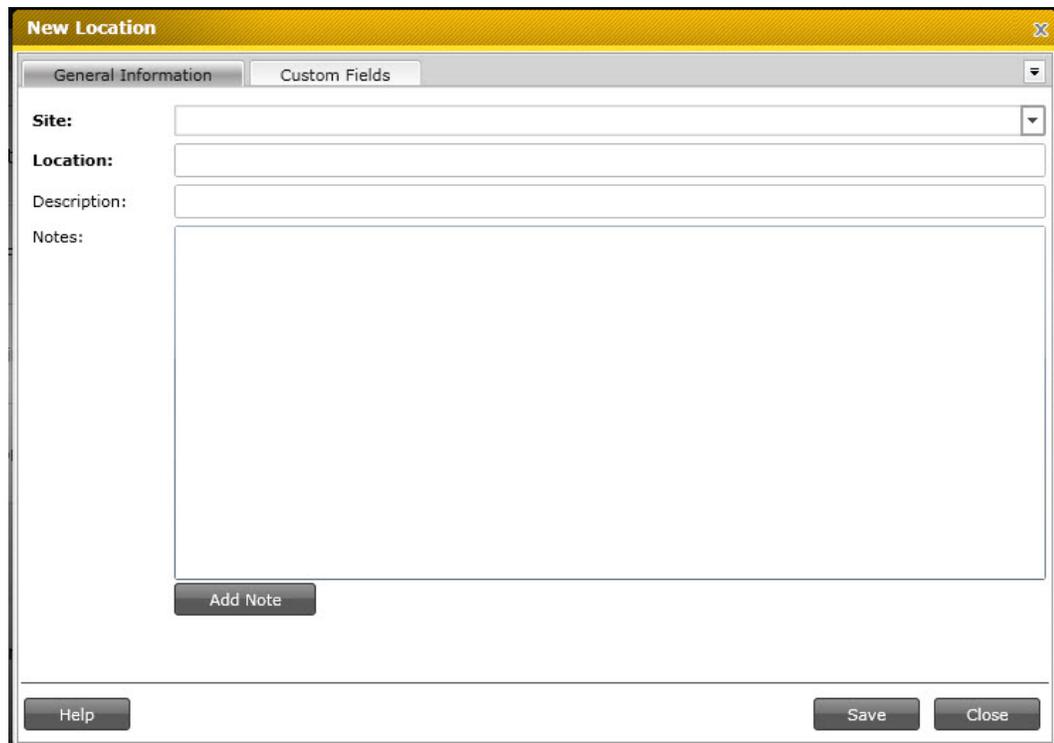
See the [Using Custom Fields](#) topic for instructions on creating custom text, number and date fields.

## Create New Location

The **New Location** page allows you to enter a new **Location** for an existing site to the database. Locations are places within a particular **Site** where assets reside. Typically, a **Site** is a building that contains one or more inventory **Locations**. For instance, Sebastian's Office might be a location within the site My Company.

1. To access the **New Location** page from the **Main Menu** click **New > Location**. The **New Location** screen appears.

You can also access the **New Location** screen from the **Location List** by clicking the **New Record** button on the toolbar. For more information on using the Lists, see the [Working with Lists](#) topic.



2. Enter the requested information on the screen. The **Site** and **Location** fields are required. If you enter a site that does not exist in the database, the system will ask if you want to create the new site now.

**Description** allows you to enter a description of the Location. This is useful when the Location name is abbreviated (For example, Location "A7B2" could be described as "Aisle 7 Bin 2".)

**Notes** is a text field available to record any additional information you might have about this Location. Click the **Add Notes** button to edit the **Notes** field.

3. For information about the **Custom Texts** and **Custom Numbers** and **Dates** tabs, see [Using Custom Fields](#).

4. When the [Close New Form](#) option is turned off: Click **Save** to commit your entry or click **Close** to exit the form.

When the **Close New Form** option is turned on: Click **OK** to commit your entry and exit the form or **Cancel** to exit the form without saving your entry.

Users setup in the **Admin Group** in **Security** can limit use of MobileAsset Web to a single Site. See the **Set Default Working Site** help topic for more information.

---

## Create New Manufacturer

The **Create New Manufacturer** page allows you to enter a new **Manufacturer** in the database. **Manufacturers** can be assigned to Asset Types.

If a **Manufacturer** is also your **Vendor** for an Asset Type, it is best to define the company in the software as a **Vendor**, in addition to defining it as a **Manufacturer**.

1. To access this screen, from the **Main Menu**, click **New > Manufacturer**. The **New Manufacturer** page will appear.

The **New Manufacturer** page can also be accessed from the **Manufacturer List** by clicking the **New Record** button on the toolbar. For more information on using the **List** screens, see the [Working with Lists](#) topic.

The screenshot shows a web-based form titled "New Manufacturer". The form is organized into three tabs: "General Information", "Additional Information", and "Custom Fields". The "General Information" tab is currently selected. The form contains the following fields:

- Name:** A single-line text input field.
- Address:** A section containing several fields:
  - Address Type:** A dropdown menu with "Manufacturer Billing" selected.
  - Address 1:** A single-line text input field.
  - Address 2:** A single-line text input field.
  - Mail Stop:** A single-line text input field.
  - City:** A single-line text input field.
  - State:** A single-line text input field.
  - Postal Code:** A single-line text input field.
  - Country:** A single-line text input field.
- Phone:** A single-line text input field.
- Fax:** A single-line text input field.
- Email:** A single-line text input field.
- Web Site:** A single-line text input field.

At the bottom of the form, there are three buttons: "Help", "Save", and "Close".

2. Complete the information on the screen. The **Name** and **Address Type** fields are required; all other fields are optional.

Select an **Address Type** from the drop down list, then provide any of the associated information you have for this **Manufacturer**: **Address 1**, **Address 2**, **Mail Stop**, **City**, **State**, **Postal Code** and **Country**. Address information can be entered for each **Address Type** you select.

Different **Phone**, **Fax**, **Email** and **Web Site** information can be entered for different **Address Types**.

3. The **Additional Information** tab provides optional fields where other information about the **Manufacturer** can be recorded: **Contact Name**, **Contact Phone**, **Extension**,

**Contact Cell No.**, **Contact Fax** and **Notes** fields.

**Notes** is a text field available to record any additional information you might have about this Manufacturer. Click the **Add Notes** button to edit the **Notes** field.

The screenshot shows a software window titled "New Manufacturer" with a yellow header. It has three tabs: "General Information", "Additional Information" (which is selected), and "Custom Fields". Under the "Additional Information" tab, there is a section titled "Contact Personal Information" containing five input fields: "Contact Name:", "Contact Phone:", "Extension:", "Contact Cell No:", and "Contact Fax:". Below this section is a large text area labeled "Notes:" with an "Add Note" button centered below it. At the bottom of the window are three buttons: "Help" on the left, and "Save" and "Close" on the right.

4. For information about the **Custom Fields** tab, see [Using Custom Fields](#).
5. When the [Close New Form](#) option is turned off: Click **Save** to save your entry or click **Close** to exit the screen.

When the **Close New Form** option is turned on: Click **OK** to save your entry and exit the form or **Cancel** to exit the screen without saving your entry.

## Create New Site

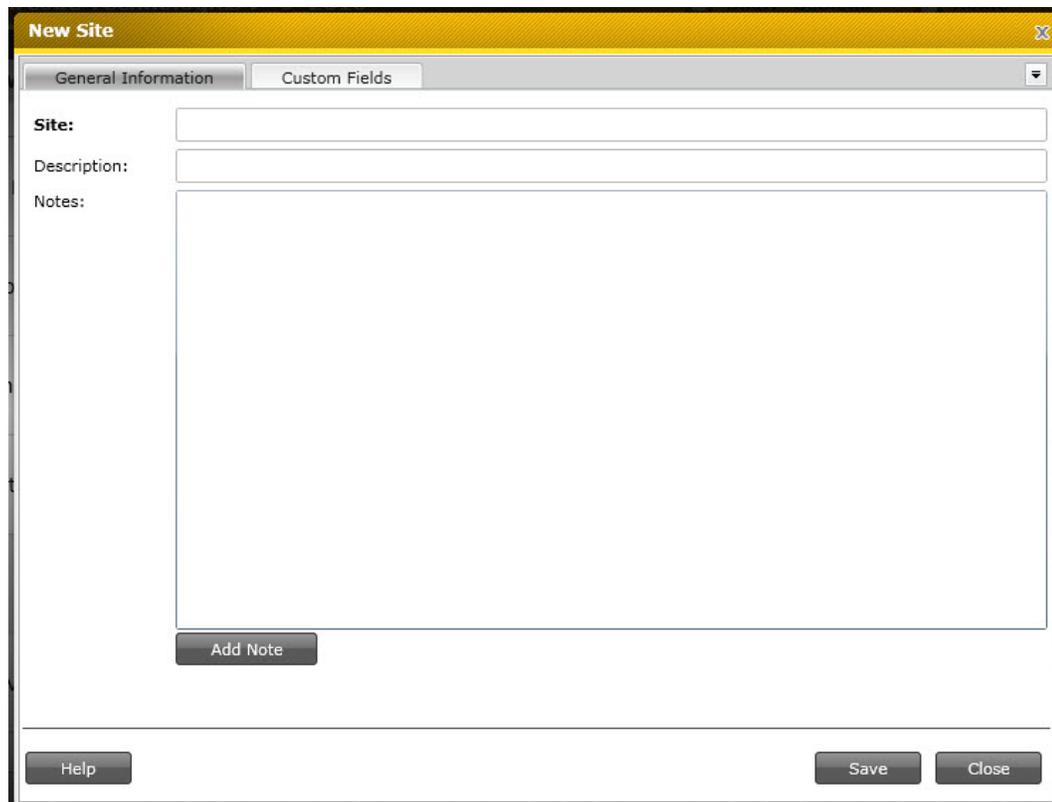
The **New Site** page allows you to add a new **Site** to your database. Typically, a **Site** is a building that contains one or more asset Locations. For instance, Sebastian's Office might be a location within the site My Company. Pay attention to the site you are working with when using MobileAsset.

Users setup with **Administrative Privileges** in **Security** can limit use of MobileAsset to a single Site. See the Set Working Site help topic for more information.

It is not uncommon to use this product with only one Site defined. A minimum of one Site is required.

1. To access the **New Site** page from the **Main Page** click **New > Site**. The **New Site** screen appears.

The **New Site** screen can be accessed from the **Site List** by clicking the **New Record** button on the toolbar. For more information on using the **Lists**, see the [Working with Lists](#) topic.



2. **Description** allows you to enter a description of the Site. This is useful when the Site value is unclear (For example, Site "H7" could be described as "Hangar 7".)

**Notes** is a text field available to record any additional information you might have about

- this Site. Click the **Add Notes** button to edit the **Notes** field.
3. For information about the **Custom Fields** tab, see [Using Custom Fields](#).
  4. When the [Close New Form](#) option is turned off: Click **Save** to save your entry or click **Close** to exit the screen.

When the **Close New Form** option is turned on: Click **OK** to save your entry and exit the form or **Cancel** to exit the screen without saving your entry.

---

## Create New Vendor

The **Create New Vendor** page is used to enter a new vendor into the database. Vendors can be assigned to Asset Types.

1. To access the screen, from the **Main** screen click **New > Vendor**. The **New Vendor** screen appears.

The **New Vendor** page can also be accessed from the Vendor List by clicking the **New Record** button on the toolbar. For more information on using the **List** screens, see the [Working with Lists](#) topic.

If a Vendor is also your **Manufacturer** for an **Asset Type**, it is best to define the company in the software as a **Manufacturer**, in addition to defining it as a **Vendor**.

The screenshot shows the 'New Vendor' form with the following fields and controls:

- Header: 'New Vendor' with a close button (X).
- Tabs: 'General Information', 'Additional Information', 'Custom Fields'.
- Fields: 'Vendor Code', 'Name', 'Address Type' (dropdown), 'Address 1', 'Address 2', 'Mail Stop', 'City', 'State', 'Postal Code', 'Country', 'Phone', 'Fax', 'Email', 'Web Site'.
- Buttons: 'Help', 'Save', 'Close'.

2. Enter the requested information on this screen. The **Vendor Code** and **Address Type** fields are required. All other fields are optional.

Select an **Address Type** from the drop down list, then provide any of the associated information you have for this **Vendor**: **Address 1**, **Address 2**, **Mail Stop**, **City**, **State**, **Postal Code** and **Country**. Address information can be entered for each **Address Type** you select.

A different **Phone**, **Fax**, **Email** and **Web Site** can be entered for different **Address Types**.

3. The **Additional Information** tab provides optional fields where other information about the Vendor can be recorded: **Contact Name**, **Contact Phone**, **Extension**, **Contact Cell**

**No.**, **Contact Fax** and **Notes** fields.

**Notes** is a text field available to record any additional information you might have about this Vendor. Click the **Add Notes** button to edit the **Notes** field.

The screenshot shows a window titled "New Vendor" with a yellow header. It has three tabs: "General Information", "Additional Information" (which is selected), and "Custom Fields". Under the "Additional Information" tab, there is a section titled "Contact Personal Information" containing five input fields: "Contact Name:", "Contact Phone:", "Extension:", "Contact Cell No:", and "Contact Fax:". Below this section is a large text area labeled "Notes:" and a button labeled "Add Note". At the bottom of the window are three buttons: "Help", "Save", and "Close".

4. You can optionally enter information on the **Custom** tabs. For information about the **Custom Fields** tab, see [Using Custom Fields](#).
5. When the [Close New Form](#) option is turned off: Click **Save** to save your entry or click **Close** to exit the screen.

When the **Close New Form** option is turned on: Click **OK** to save your entry and exit the form or **Cancel** to exit the screen without saving your entry.

## Using Custom Fields

Custom fields allow you to enter information specific to your company in MobileAsset. In the MobileAsset PC application you can set custom fields that will appear for all users. In the MobileAsset Web Module you can enter custom text, numbers or dates on specific screens. Custom Field tabs are available on the following screens:

- New/Edit Asset Screen**
- New/Edit Asset Type Screen**
- New/Edit Contract/License Screen**
- New/Edit Employee Screen**
- New/Edit Location Screen**
- New/Edit Manufacturer Screen**
- New/Edit Site Screen**
- New/Edit Vendor Screen**

If a custom field has been set in the MobileAsset PC application and made visible and/or required, you will see it on the Custom Field tab. For example, if you make a custom drop down list in a custom text field for the New/Edit Asset screen and make it required, all users who create or edit assets in the MobileAsset Web Module will see the field on the Custom Field tab and will have to complete it before they can save the asset.

You can also enter information in a custom field specific to just that instance. This type of custom text/number/date will only be visible on that specific asset, asset type, contract, etc.

Below is an example of the **Custom Fields** tab on the **New/Edit Asset** screen:

The screenshot shows a software window titled "Automatically assigned" with a tabbed interface. The "Custom Fields" tab is active, displaying a form with three main sections: "Text", "Number", and "Dates".

- Text:** Contains 10 dropdown menus labeled "Custom Text 1:" through "Custom Text 10:". "Custom Text 3:" is highlighted in blue.
- Number:** Contains 5 numeric input fields labeled "Custom Number 1:" through "Custom Number 5:". Each field contains the value "0.0000" and has a small spinner icon to its right.
- Dates:** Contains 5 date input fields labeled "Custom Date 1:" through "Custom Date 5:". Each field has a small calendar icon to its right.

At the bottom of the window, there is a toolbar with the following elements from left to right: a "Help" button, a "Pin All" button with a red pin icon, a "Print Tag On OK - Copies: 0" field with a spinner, and "OK" and "Cancel" buttons.

# Editing Information

## Edit Asset

The **Edit Asset** screen allows you to modify an existing asset. This page is accessed from the **Asset List** by highlighting an asset in the list, then clicking the **Edit** button on the toolbar. For more information on using the **List** screens, see the [Working with Lists](#) topic.

The **Edit Asset** screen is identical to the **New Asset** page, except all the information previously entered for the asset appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the [Create New Asset](#) topic.

---

## Edit Asset Type

The **Edit Asset Type** screen allows you to modify an existing asset type. This page is accessed from the **Asset Type List** by highlighting an asset type in the list, then clicking the **Edit** button on the toolbar. For more information on using the List pages, see the [Working with Lists](#) topic.

Keep in mind that editing an **Asset Type** (The asset type is a category for assets. Assets are assigned to a specific asset type. For instance, you may have an Asset Type of Label Printers that defines the manufacturer, size specs, etc. of this particular type of printer. Then specific printers of the same type are assigned to the Label Printers asset type.) will affect every Asset associated with that Asset Type.

The **Edit Asset Type** screen is identical to the **New Asset Type** page, except all the information previously entered for the asset type appears on the page. You can change any of this information. For information on using each tab of the screen, please refer to the [Create New Asset Type](#) topic.

---

## Edit Contract/License

The **Edit Contract/License** screen allows you to modify an existing contract/license. This page is accessed from the **Contracts List** by highlighting an contract in the list, then clicking the **Edit** button on the toolbar. For more information on using the Lists, see the [Working with Lists](#) topic.

The **Edit Contract/License** screen is identical to the **New Contract/License** screen, except all the information previously entered for the contract appears on the screen. You can change any of this information. For information on using each tab of the screen, please refer to the [Create New Contract/License](#) topic.

---

## Edit Customer

The **Edit Customer** screen allows you to modify an existing customer. This page is accessed from the **Customer List** by highlighting an customer in the list, then clicking the **Edit** button on the toolbar. For more information on using the **Lists**, see the [Working with Lists](#) topic.

The **Edit Customer** screen is identical to the **New Customer** page, except all the information previously entered for the customer appears on the page. You can change any of this information. For information on using the **New Customer** screen, please refer to the [Create New Customer](#) topic.

---

## Edit Department

The **Edit Department** screen allows you to modify an existing department. This screen is accessed from the **Department List** by highlighting an department in the list, then clicking the **Edit** button on the toolbar. For more information on using the **Lists**, see the [Working with Lists](#) topic.

The **Edit Department** screen is identical to the **New Department** page, except all the information previously entered for the department appears on the screen. You can change any of this information. For information on using the **Department** screen, please refer to the [Create New Department](#) topic.

---

## Edit Depreciation Class

The **Edit Depreciation Class** screen allows you to modify an existing **Depreciation Class**. This screen is accessed from the **Depreciation Class List** by highlighting a listing and clicking the **Edit Record** button on the toolbar. See the [Working with Lists](#) help topic for more information.

The **Edit Depreciation Class** screen is identical to the **New Depreciation Class** page, except all the information previously entered for the class appears on the screen. You can change any of this information. For information on using the screen, please refer to the [Create New Depreciation Class](#) topic.

Keep in mind that any changes made to an existing **Depreciation Class** will impact depreciation calculations for every Asset Type associated with this class.

---

## Edit Employee

The **Edit Employee** screen allows you to modify an existing employee. This screen is accessed from the **Employee List** by highlighting an employee in the list, then clicking the **Edit** button on the toolbar. For more information on using the **Lists**, see the [Working with Lists](#) topic.

The **Edit Employee** screen is identical to the **New Employee** page, except all the information previously entered for the employee appears on the screen. You can change any of this information. For information on using each tab of the **Employee** screen, please refer to the [Create New Employee](#) topic.

---

## Edit Location

The **Edit Location** screen allows you to modify an existing location. This screen is accessed from the **Location List** by highlighting a location in the list, then clicking the **Edit** button on the toolbar. For more information on using the **Lists**, see the [Working with Lists](#) topic.

The **Edit Location** screen is identical to the **New Location** page, except all the information previously entered for the location appears on the screen. You can change any of this information. For information on using the **Location** screen, please refer to the [Create New Location](#) topic.

---

## Edit Manufacturer

The **Edit Manufacturer** screen allows you to modify an existing **Manufacturer**. This screen is accessed from the **Manufacturer List** by highlighting a manufacturer in the list, then clicking the **Edit** button on the toolbar. For more information on using the **Lists**, see the [Working with Lists](#) topic.

The **Edit Manufacturer** screen is identical to the **New Manufacturer** screen, except all the information previously entered for the manufacturer appears on the screen. You can change any of this information. For information on using the **Manufacturer** screen, please refer to the [Create New Manufacturer](#) topic.

---

## Edit Site

The **Edit Site** screen allows you to modify an existing site. This screen is accessed from the **Site List** by highlighting a site in the list, then clicking the **Edit** button on the toolbar. For more information on using the **Lists**, see the [Working with Lists](#) topic.

The **Edit Site** screen is identical to the **New Site** screen, except all the information previously entered for the site appears on the screen. You can change any of this information. For information on using the **Site** page, please refer to the [Create New Site](#) topic.

---

## Edit Vendor

The **Edit Vendor** screen allows you to modify an existing vendor. This screen is accessed from the **Vendor List** by highlighting a vendor in the list, then clicking the **Edit** button on the toolbar.

For more information on using the **Lists**, see the [Working with Lists](#) topic.

The **Edit Vendor** screen is identical to the **New Vendor** screen, except all the information previously entered for the vendor appears on the screen. You can change any of this information. For information on using the **Vendor** screen, please refer to the [Create New Vendor](#) topic.

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# Asset Management

## Adding New Assets

The **New Asset** page is used to enter a new asset into the database.

The following topics are discussed in this section:

[Accessing the New Asset Page](#)

[General Tab](#)

[Asset Linking Tab](#)

[Depreciation Tab](#)

[Attachments Tab](#)

[Picture Tab](#)

[Maintenance Tab](#)

[Contracts Tab](#)

[Transaction History Tab](#)

[Custom Fields Tab](#)

---

### Accessing the New Asset Page:

To access this feature, from the **Main Menu** select **Asset Management > New Asset**.

OR

From the **Main Menu** select **New > Asset**.

This feature can also be accessed from the [Asset List](#) by clicking the **New Record** button on the toolbar. For more information on using the list screens, please refer to the topic [Working with Lists](#).

The **New Asset** page is divided into several tabs as shown below:

### New Asset Page > General Tab

An example of the **General Tab** is shown in the screen shot above.

**Pinning:** You may notice that some fields on this and other tabs have a **Pin** icon in front of them. These fields represent data that can be "pinned". Pinning allows you to "lock" the information entered into a field. This is convenient if, for example, you are entering multiple new assets for a particular site and location. You can enter the site and location once, then pin them. The fields will retain the information you entered through each new entry until you unpin them. In the example screen shown below, values are entered in the Site, Location and Department Code fields. These three fields were **Pinned** by clicking on their pushpins, causing them to look like this.



Click the pushpin again to unlock the field to enter different information.

Click the **Pin All** icon to pin every field that offers the pinning feature. Click it again to undo pinning for all fields.

### To Create an Asset:

1. Enter information in the required fields. You must enter information in the Asset Tag, Asset Type, Site, and Location fields.

**Note:** If you are using [Automatic Asset Tags](#), you do not need to enter anything in the Asset Tag field. If the [Automatic Asset Tags](#) function is turned on (**Administration > Options** on the PC version of MobileAsset), the **Asset Tag** field will appear as follows:



The tag will be generated when you click the **Save** button or when you click the button next to the **Asset Tag** field.

2. When you select an **Asset Type**, the following screen will display:



Select **Yes** to populate fields with information from the Asset Type such as Check Out Length, Model Number, Vendor, etc. For example, if **Check Out Length** information is entered for the Asset Type, it will appear here.

If you have enabled the [Edit Inherited Asset Type Data](#) option on the **Options** screen, you can make changes to the information that is populated from the Asset Type. If this option is not enabled, these fields will be disabled and you will not be able to make changes.

If you do not want to incorporate information from the Asset Type, other than the Asset Type number and Description, click **No**.

3. The **Department Code**, **Serial No.**, **Condition**, **Hyperlink** and **Additional** Info fields are optional.

The **Hyperlink** field can be used to store a link to the manufacturer's website, or even to a location on your network. When a valid web address is entered in this field, the icon next to it will be enabled. Clicking the icon will open your web browser and access the website.

**Note:** When using the drop down lists to enter information in a field (Asset Type, Site, Location, etc.), the last few selections will appear in the list. If you want to search for an existing value, select **<More>** from that field's drop down list to access the List screen.

Use the vertical scroll bar to select a record from the List and click the List dialog's **Select** button.

4. Click **OK** if you are done entering information for this asset or click on another tab to proceed with entering more information.

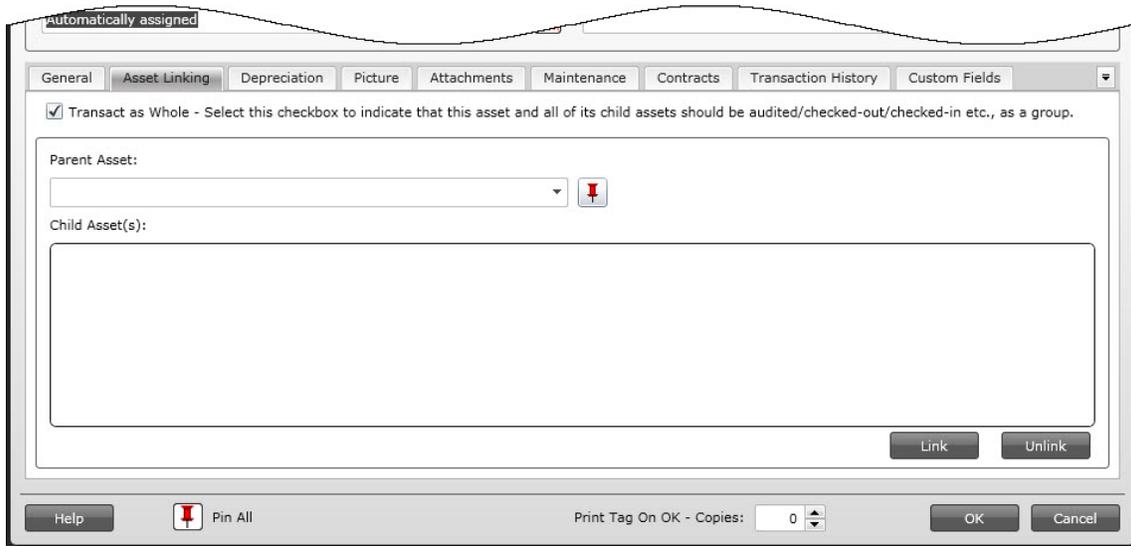
---

## New Asset Page > Asset Linking Tab

**Asset Linking** is only available in the Professional and Enterprise versions of MobileAsset.

**Asset Linking**, also known as Asset Kitting, allows you to link two or more assets together to form one new asset. For example, the asset Mary's Computer may consist of 4 separate assets - CPU, Keyboard, Mouse and Monitor. These four individual assets are linked together to form one new asset, Mary's Computer. For a complete definition of **Asset Linking** and an example, please refer to the [Definitions](#) topic.

The **Asset Linking** tab allows you to create links:



1. The **Asset Tag** value entered on the **General** tab will be displayed at the top, but can still be edited, if desired.
2. If this asset is to be the **Parent**, or top-level asset, of this group, you can leave the **Parent Asset** field blank. If you want to give this asset a parent (for instance, if this asset is a monitor and you want to link to the asset Mary's Computer), select an asset from the drop down list in the **Parent Asset** field.

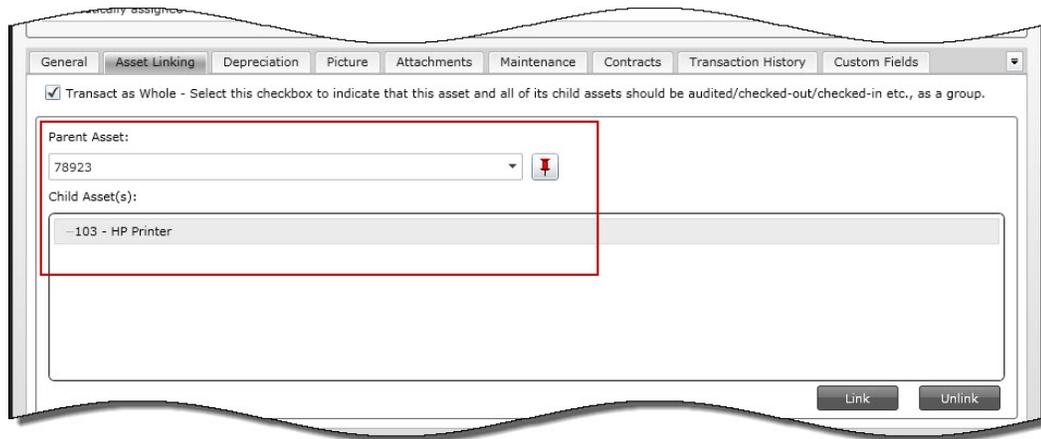
The asset can have a parent assigned to it and be a parent (have child assets assigned to it).

Select **<More>** from the drop down list to access the Asset List. Remember, you can filter the asset list to only display "Top Level" assets, or parent assets, if needed. See the [Working with Lists](#) topic for further information.

3. To associate child assets with this asset (the current asset will be the "parent" of these assets), click the Link button below the **Child Asset(s)** window. The **Asset List** will appear.

Highlight the desired asset in the Asset List, then click the **Select** button. The selected

asset will appear in the **Child Asset(s)** window as shown below:



In this example, asset number 78923 is the parent of the current asset and 103-HP Printer is the child.

**A Note about the Transact as Whole Flag:** In the example above, the **Transact as whole** flag is checked; therefore, any functions (check-in, check-out, audit, move, etc.) will be performed as a whole for the group. This flag is driven from the top down, meaning the selection made for the parent asset will override the selection for a child asset. If you want to move only one asset that is a child of this asset, you will need to deselect this checkbox. Deselecting it on the **Edit Asset > Asset Linking** tab for the child asset (in this case, Asset 103) will not override the selection made for this asset, and this group would still be moved as a whole. Similarly, if the **Transact as whole** flag was **NOT** selected on this tab, but it IS selected for Asset 78923 (the parent of this asset), the group would still be transacted as a whole because the selections made for the parent of this asset would take precedence. To put it another way, if you think of these relationships in the vein of child-rearing, one of your children may decide it is ok to borrow the car, but you as the parent do not think it is ok. Your decision as the parent would override that of the child.

Also keep in mind that when you check out an asset that has **Transact as whole** turned on and you select to use the **Default Due Date** (on the **Check Out** screen) MobileAsset will search all assets linked to the selected asset to find the maximum checkout duration. The program will use this maximum length to calculate the due dates for all the linked assets. This ensures that all the assets in the transaction have the same due date even if some of the linked assets have different checkout durations.

You can unlink child assets by highlighting the asset in the **Child Assets** list and clicking the **Unlink** button.

4. Click **OK** if you are done entering information for this asset or click another tab to proceed with entering more information.

---

## New Asset Page > Depreciation Tab:

Click the **Depreciation** tab if you want the software to calculate depreciation for this asset. The method used by the system to calculate depreciation is dependent on the Asset Type assigned to this asset.

The **Asset Tag** value entered on the **General** tab will be displayed at the top, but can still be edited, if desired.

The screenshot shows the 'Depreciation' tab in the MobileAsset software. At the top, the 'Asset Tag' is 'Automatically assigned' and the 'Asset Description' is empty. The 'Depreciate Asset' checkbox is disabled and checked, with a message: 'Assets of this asset type cannot be depreciated.' Below this, there are fields for 'Purchase Order', 'Purchase Date', 'Purchase Cost' (0.00), and 'Salvage Value' (0.00). To the right, there are fields for 'Depreciation Begin Date', 'Last Depreciation Date', 'Total Depreciation', 'Current Depreciation', and 'Book Value'. The bottom of the window shows 'Print Tag On OK - Copies: 0' and 'OK' and 'Cancel' buttons.

1. Click the **Depreciate Asset** checkbox if you want the software to calculate depreciation. The **Depreciate Asset** checkbox will be disabled if a **Depreciation Class** has not been defined for the Asset Type specified on the **General** tab **-or-** that Asset Type has a **Depreciation Class**, but its **Depreciation Method** is "None".
2. **The depreciation method used for an asset is determined by the Depreciation Class assigned to the Asset Type.** This information appears in the **Class Info** box and cannot be modified from this screen. If you want to change the **Depreciation Method** or the **Life** of a particular asset, you will need to make changes to the **Depreciation Class** assigned to the Asset Type, or create a new **Depreciation Class** to assign to the Asset Type. See the **Depreciation Class** help topic for further information.
3. **Purchase Cost** and **Depreciation Begin Date** are required fields when **Depreciate Asset** has been enabled, therefore, you must complete them if you want to calculate depreciation. These two fields are used in the calculation. Please see the [Definitions](#) topic for detailed explanations of each **Depreciation Method**.
4. **Purchase Order**, **Purchase Date** and **Salvage Value** are optional fields. If a **Salvage Value** is not specified, the **Calculate Depreciation** function will assume a **Salvage Value** of zero dollars.

The **Class Info**, **Last Depreciation Date**, **Total Depreciation**, **Current Depreciation**, and **Depreciated Value** cannot be modified. Information is populated in these fields by the system as depreciation functions are performed.

In the following example, an asset is being entered that uses **5-year Straight-Line** depreciation:

General Asset Linking **Depreciation** Picture Attachments Maintenance Contracts Transaction History Custom Fields

Depreciate Asset:

Purchase Order:

Purchase Date:

**Purchase Cost:**

Salvage Value:

Class Info:

**Class:** 5 Year Straight Line  
**Depreciation Method:** Straight-Line  
**Life:**

**Depreciation Begin Date** 7/14/2010

Last Depreciation Date:

Total Depreciation:

Current Depreciation:

Book Value:

Help Pin All Print Tag On OK - Copies: 0 OK Cancel

5. Click **OK** if you are done entering information for this asset or click the next tab to proceed with entering more information

---

## New Asset Page > Attachments Tab

To attach an image or other documentation to this Asset, click on the **Attachments** tab:

General Asset Linking Depreciation Picture **Attachments** Maintenance Contracts Transaction History Custom Fields

Attachments

- Asset Attachments

- Asset Type Attachments

View

Add

Remove

Set Default Image

Save To File

Help Pin All Print Tag On OK - Copies: 0 OK Cancel

1. To add an attachment, click the **Add** button.



A screen will appear allowing you to navigate to the desired file on your computer. Attachments are copied to the MobileAsset database from the external source you browse to when you click the **Add** button. Any change made to the external source file after adding the attachment will not update the attachment in the database. To update the database with a later version of an attached file, you must first **Remove** the attachment from the database, then **Add** the file again.

Asset **Attachments** relate only to the specific Asset being recorded. Asset Type **Attachments** relate to every Asset recorded for this Asset Type.

2. If you have attached an image, you can designate this the "default" image (meaning this is the image that will appear on the **Picture** tab) by clicking the **Set Default Image** button.
3. After you have added at least one file, the **View** button is enabled. This feature allows you to view the attached file. The **File Associations** defined in Windows Explorer determine which application will be started to open files, based on their filename extensions. On most machines, a PDF file would be opened by Adobe® Reader, for example. Image attachments can be viewed the same way or you can use the **Picture** tab to use Asset's internal image viewer.

The **Save to File** button copies the selected attachment from the database to any drive and folder available on your system.

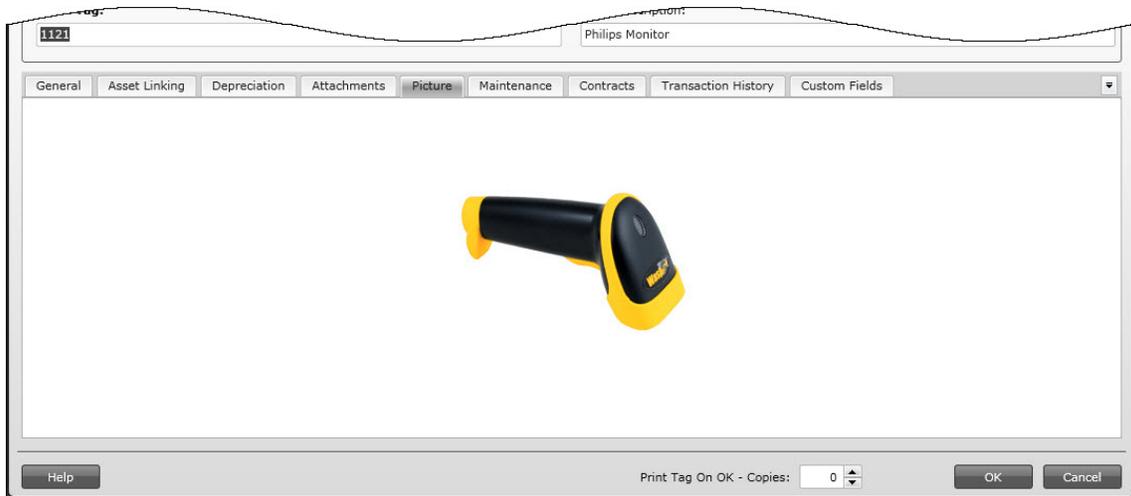
The **Remove** button can only be used to **Remove Asset Attachments**. It is grayed-out (disabled) when an Asset Type **Attachment** is selected. These Asset Type **Attachments** may be related to other Asset Tags under the same Asset Type. Asset Type **Attachments** can only be removed via the **Edit Asset Type Attachments** tab (see **Creating New Asset Types** for further information.).

4. Attachments are not actually added to the database until the **OK** button is clicked. You can click it at this time if you are finished adding additional information, or click it later, after you have completed information on other tabs.

---

### New Asset Page > Picture Tab

Click the **Picture** tab to view any image files that have been attached to either the **Asset Type Attachments** folder or the **Asset Attachments** folder.



1. The first time you access this tab it will be blank if a default picture has not been added on the **Attachments** tab either on the **Add/Edit Asset** screen or the **Add/Edit Asset Type** screen (for the **Asset Type** assigned to this asset).

The current default picture is always displayed on the **Picture** tab. Right click the image to see the popup **Picture** menu. This menu allows you to **Add** (a new) Image or to **Select** (a previously added) Image. Any image you select for display will become the new default image.

The files listed in the **Select Image** sub-menu are a combination of Asset Type Attachment images and Asset Attachments images, sorted alphabetically, by filename.

2. Image files are not actually added to the database until the **OK** button is clicked. You can click it at this time if you are finished adding additional information, or click it later, after you have completed information on other tabs.

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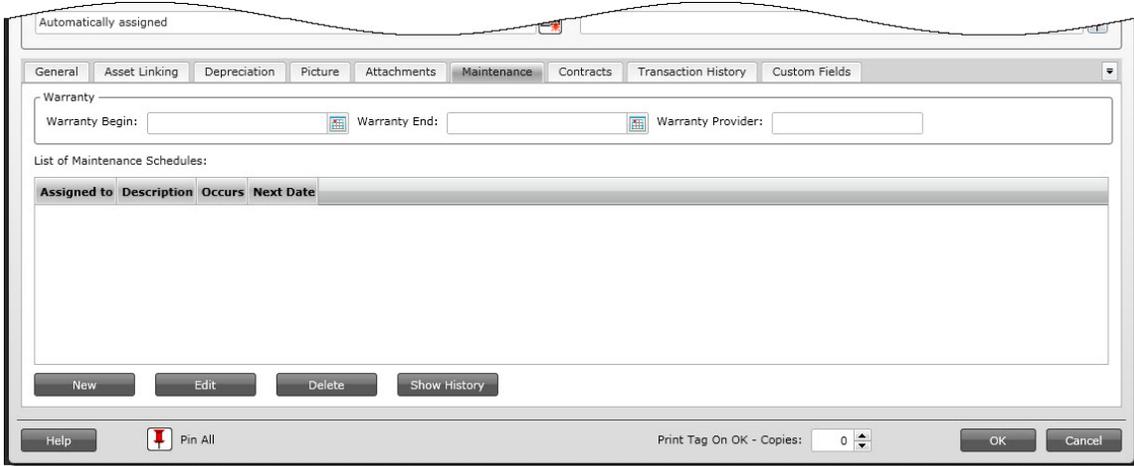
### New Asset Page > Maintenance Tab

The **Maintenance** tab allows you to define maintenance procedures, a maintenance schedule, and warranty information for an Asset.

This tab allows you to:

- [Enter Warranty Information](#)
- [Enter New Maintenance Schedules](#)
- [Edit Existing Maintenance Schedules](#)
- [View Maintenance History](#)

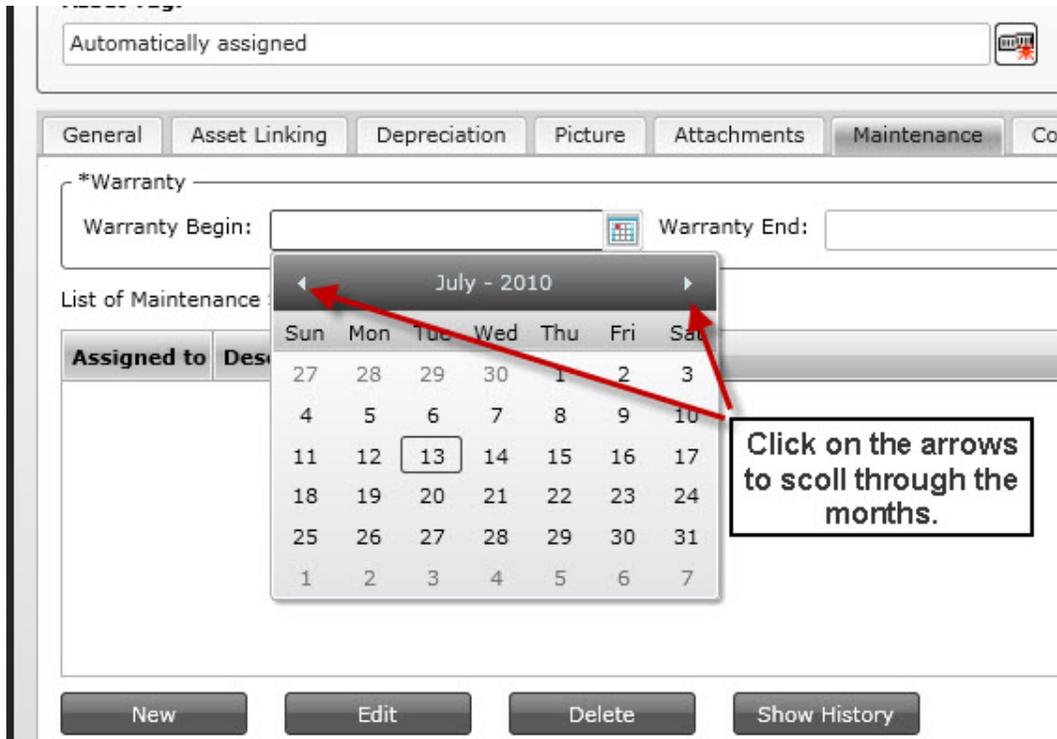
Below is an example of the **Maintenance** tab:



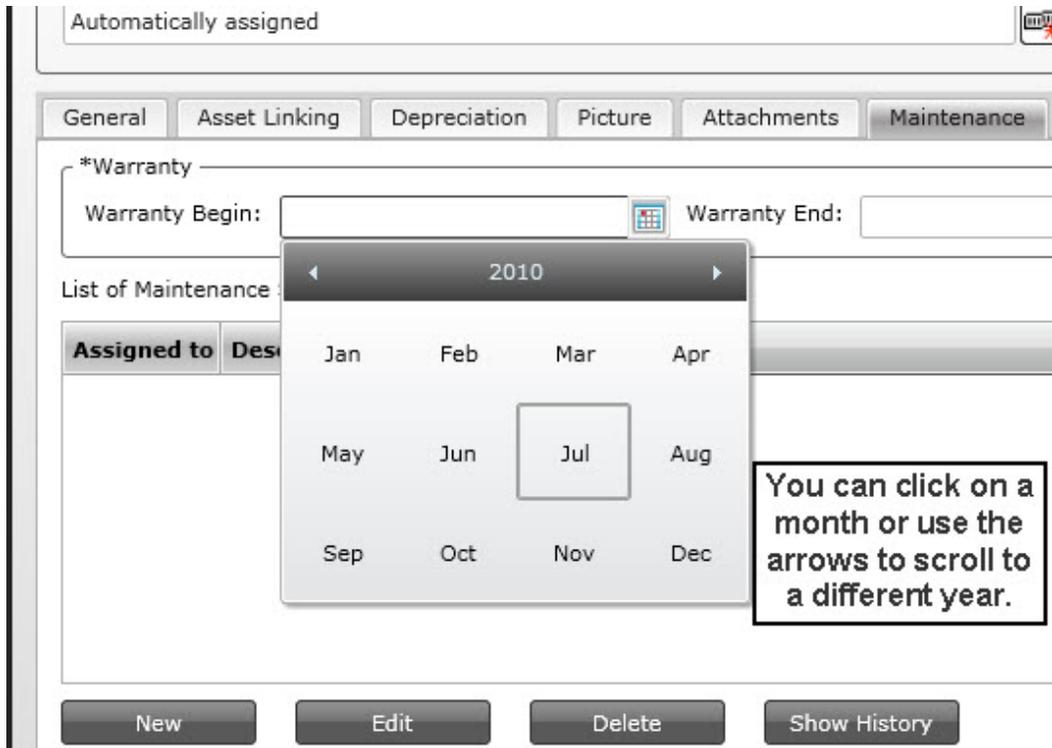
**Entering Warranty Information:**

1. You can optionally enter **Warranty Begin** and **End** dates and a **Warranty Provider** at the top of this tab.

Click on the **Calendar** icon to access the calendar feature:



You can also click on the **Month/Year** (August, 2009 in the example above) to view a list of all months. You can then click on a month to quickly switch dates:

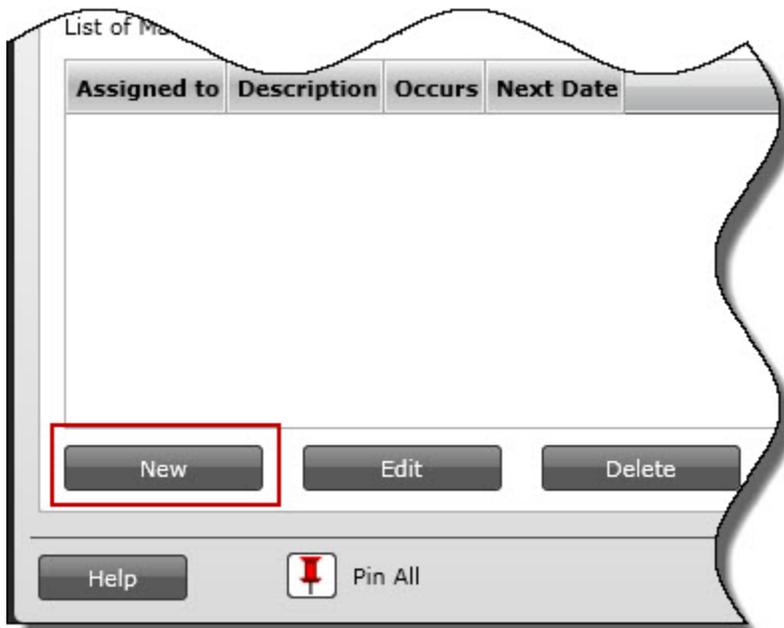


2. You can optionally enter the warranty provider in the Provider field.

**Entering New Maintenance Schedules:**

To enter a new maintenance schedule:

1. Click the **New** button below the window:



The **Maintenance Schedule** screen appears:

The screenshot shows a window titled "Maintenance Schedule" with a yellow header. The window contains the following fields and controls:

- Maintenance Name:** A text input field.
- Assign to:** A dropdown menu.
- Occurs:** A dropdown menu currently showing "Date".
- Date:** A text input field containing "7/13/2010" with a calendar icon to its right.
- Next Date:** A text input field containing "Tuesday, July 13, 2010".
- Instructions:** A large, empty text area.
- Buttons:** "Help", "Save", and "Cancel" buttons are located at the bottom of the window.

2. Enter a name for this maintenance schedule.
3. Select the employee who this asset will be assigned to from the **Assigned To** drop down list. All employees currently set up in your software will appear in the drop down list.
4. Select how often this maintenance schedule is to happen from the **Occurs** drop down list. The area below the **Occurs** drop down list will change depending on the selection you make here. Your options are:
  - **Date** - This option indicates a one-time maintenance procedure. When you select this option, a **Date** field will appear below the **Occurs** drop down list. Select the date on which the maintenance should take place. You can click on the calendar icon to select a date or type a date directly into the field.

Occurs:

Date

Next Date:

- **Daily** - This option allows you to specify a **Maintenance Start** date, followed by a frequency specified as Every x number of days (up to a maximum of every 366 days).

In this example, maintenance would be performed every 10 days beginning Tuesday, July 13, 2010.

Occurs:

Daily

Maint Start:

Every  day(s)

Next Date:

The **Next Date** at the bottom of the screen indicates the next date maintenance will be performed on this asset.

- **Weekly** - This option allows you to specify a **Maintenance Start** date, followed by the frequency specified as Every x number of weeks. You will also select the days of the week on which the maintenance is to be performed. More than one weekday can be selected.

In this example, maintenance will be performed every week on Fridays beginning July 16, 2010.

Occurs:

Weekly

Maint Start:

Every  week(s) on:

Sun  Mon  Tue  Wed

Thu  Fri  Sat

Next Date:

The **Next Date** at the bottom of the screen indicates the next date maintenance will be performed on this asset. In this example, since we have selected Friday

as the maintenance day, the **Next Date** is Friday, July 16, 2010.

- **Monthly** - This option allows you to specify a **Maintenance Start** date, followed by your choice of two possibilities: Maintenance Every x number of months (up to a maximum of every 99 months) as shown below:

In this example, maintenance will occur on the 1st day of each month every month.

The screenshot shows a web form for configuring a maintenance schedule. At the top, 'Occurs:' is set to 'Monthly'. Below this, a section titled 'Monthly' contains a 'Maint Start:' field with the value '7/16/2010'. Underneath, there are two radio button options: 'Day' (which is selected) and an empty dropdown. The 'Day' option is followed by a numeric input field containing '1', the text 'of every', another numeric input field containing '1', and the text 'month(s)'. Below this, there is another set of empty dropdowns and a numeric input field containing '1' followed by 'month(s)'. At the bottom of the form, 'Next Date:' is displayed as 'Sunday, August 01, 2010'. A red box highlights the 'Day' radio button, the '1' in the first numeric field, and the '1' in the second numeric field.

Notice the **Next Date** reflects the first day of the next month.

**OR**

Maintenance can be set to occur on a specific weekday of every x number of months (up to a maximum of every 99 months) as shown below:

This screenshot is similar to the previous one, but the 'Day' radio button is not selected. Instead, the '1st' dropdown menu is selected, followed by a 'Thursday' dropdown menu. The rest of the form, including the 'Maint Start:' field ('7/16/2010'), the 'of every 1 month(s)' text, and the 'Next Date:' field ('Thursday, August 05, 2010'), remains the same. A red box highlights the '1st' dropdown, the 'Thursday' dropdown, and the '1' in the 'of every 1 month(s)' text.

In this example, maintenance will occur on the first Thursday of every month.

Notice the **Next Date** reflects the first Thursday of the next month from the **Start Date**.

- **Disable** - This option is used when you want to temporarily disable an existing maintenance schedule. Highlight the maintenance schedule in the list, then click **Edit**. On the **Maintenance Schedule** screen, select **Disabled** from the **Occurs** drop down box. You can also set up a new maintenance schedule as **Disabled** then enable it later by select **Daily**, **Weekly**, etc.
5. Click **Save** when you are done entering information for this maintenance schedule. The schedule will appear in the list on the **Maintenance** tab:

Warranty

Warranty Begin:   Warranty End:

List of Maintenance Schedules:

Assigned to	Description	Occurs	Next Date
Bradley, Pittsburg	Battery Replacement	Monthly	7/13/2010

New Edit Delete Show History

Help  Pin All

#### Editing Existing Maintenance Schedules:

1. Highlight the maintenance entry you want to edit, then click the **Edit** button. The **Maintenance Schedule** screen will appear populated with the selected entry's information.
2. Make changes as necessary, then click the **Save** button. The edited entry will appear in the list on the **Maintenance** tab.

#### Viewing Maintenance History:

The **Maintenance History** screen displays all completed maintenance on this asset.

1. Click the **View History** button. The **Maintenance History** screen will appear:  
<SS>
2. When you first access this screen, all maintenance entries associated with the selected maintenance schedule are displayed. You can change the selected schedule using the **Schedule** drop down menu. You can also enter **From** and **To** dates to further filter the list.
3. Click the **Show All** button to remove the filter.
4. Select the **Print History** button to print a list of the displayed maintenance entries.

---

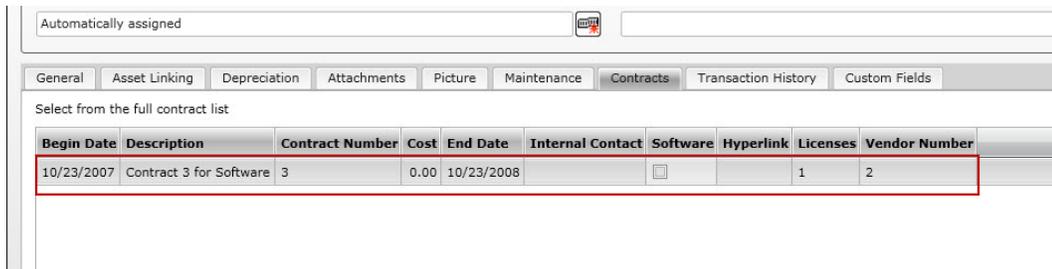
#### New Asset Page > Contracts Tab

The **Contracts** tab allows you to record contract and/or software licenses associated with this asset. The tab will appear empty when you are first adding a new asset. You can add contracts

and licenses to this asset as needed from this tab. Contracts/licenses can be added to the database via the **Contracts List** screen.



1. To add a contract/license, click the **Add** button. The **Contracts List** will appear. Select the desired contract from the list, then click **Select** on the **Contracts List** screen. The selected contract will appear on the **Contracts** tab as shown in the example below:



2. You can remove a contract by highlighting it in the window, then clicking the **Remove** button.  
  
Click **Select All** to select all contracts in the window.  
  
Click **Clear All** to deselect all contract in the window.
3. Click **OK** if you are done entering information for this asset or click the next tab to proceed with entering more information

---

## New Asset Page > Transaction History Tab

The **Transaction History** tab displays data only after one or more **Asset Management** transactions have been performed (check-in, check-out, etc.). Keep in mind that this tab will be blank when you are setting up a new asset. The example below shows the **Transaction History** tab as it might appear on the **Edit Asset** screen.

Time	Type	Action	User Name
7/7/2010 10:40:06 AM	Check-Out	To employee: [redacted] - from hardware filter category, ckout <2 asset tag to empl 4 with new locat wilson Stock	Admin, User
7/7/2010 10:40:04 AM	Move	From: Helpdesk 1_ at The Wilson Hospital -	Admin, User
7/7/2010 10:40:04 AM	Move	To: Stock Room 1_ at The Wilson Hospital -	Admin, User
7/6/2010 11:45:56 AM	New Asset		Admin, User

Click **Print Transactions** to send a list of the transactions for this asset to the printer.

Click **OK** if you are done entering information for this asset or click another tab to proceed with entering more information.

## New Asset Page > Custom Fields Tab

Please refer to the **Using Custom Fields** topic for instructions on creating custom text, number and date fields.

If the **Close New Form** option is enabled on the **Options** screen and no fields are pinned, the screen will close when the **OK** button is clicked.

## Asset List Example

The **Asset List**, accessed from the **Main Menu** by selecting **List Forms > Assets** or **Asset Management > List Assets**, allows you view Assets you have already setup and to create new or modify existing assets. For detailed information on working with list screens, please see [Working with Lists](#). Below is an example of the **Asset List**.

**Asset List**

View

Search

Linking	Asset Tag	Asset Description	Asset Type	Asset Type Description	Transact As Whole	Site	Location	Department Code	Check
Not Linked	1	Philips Monitor	15 TFT	Philips Monitor	<input checked="" type="checkbox"/>	1	1	Sytem ID	<input checked="" type="checkbox"/>
Not Linked	1-1	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	3	10		<input checked="" type="checkbox"/>
Not Linked	1-2	Philips Monitor	150	Philips Monitor	<input checked="" type="checkbox"/>	3	10	IT	<input checked="" type="checkbox"/>
Not Linked	1-3	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	3	10		<input checked="" type="checkbox"/>
Not Linked	1-4	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	3	10		<input checked="" type="checkbox"/>
Not Linked	1-5	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	3	10		<input checked="" type="checkbox"/>
Not Linked	1121	Philips Monitor	150	Philips Monitor	<input checked="" type="checkbox"/>	3	10	ACC	<input checked="" type="checkbox"/>
Not Linked	1127	Dell Optiplex GX270	GX270	Dell Optiplex GX270	<input checked="" type="checkbox"/>	3	10	Wasp	<input type="checkbox"/>
Not Linked	1128	Dell GX150 CPU	GX150	Dell GX150 CPU	<input checked="" type="checkbox"/>	The Wilson Hos	Stock Room 2_	Wasp	<input checked="" type="checkbox"/>
Not Linked	1132	Dell Optiplex GX270	GX270	Dell Optiplex GX270	<input checked="" type="checkbox"/>	3	10	Wasp	<input type="checkbox"/>
Not Linked	1137	AMD Base	Athlon	AMD Base	<input checked="" type="checkbox"/>	Sutton & Merto	Green Wrythe S	Sytem ID	<input checked="" type="checkbox"/>

169 Records Viewing: Active Assets

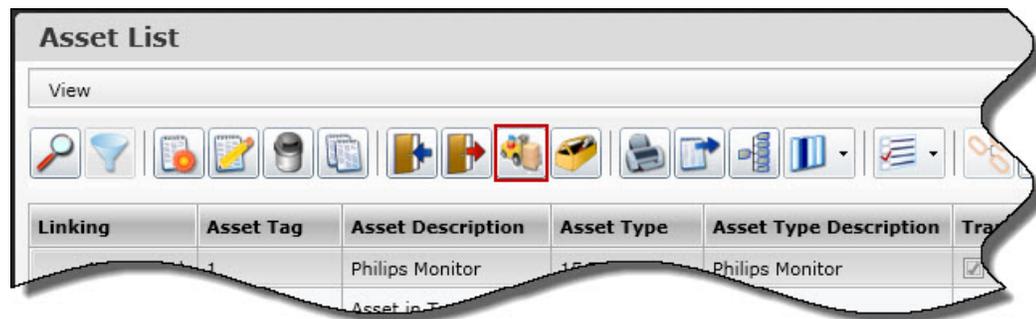
## Moving Assets

The **Move Asset** function is used to relocate an asset from one location to another.

1. To access this function, from the **Main Menu** select **Asset Management > Move**. The **Move** screen appears.

You can also access this function from the **Asset List** by highlighting an asset and clicking the **Move** button on the toolbar, or just clicking the **Move** button on the toolbar.

For more information on using the List screens, please refer to the topic [Working with Lists](#).

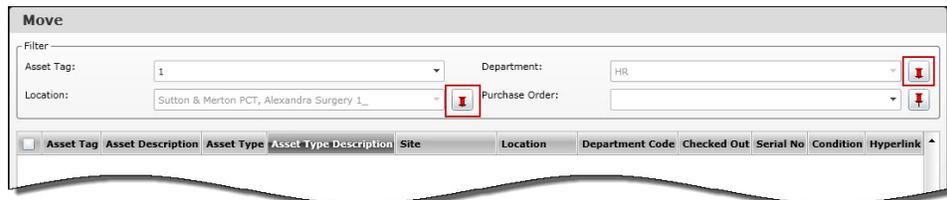


The screenshot shows the 'Move' screen. It features a 'Filter' section with four dropdown menus: 'Asset Tag', 'Department', 'Location', and 'Purchase Order'. Below the filter is a large table with columns: Asset Tag, Asset Description, Asset Type, Asset Type Description, Site, Location, Department Code, Checked Out, Serial No, Condition, Hyperlink, Manufacturer, and Mod. The table is currently empty. At the bottom, there is a 'Destination' section with a 'To Location' dropdown menu and a 'Notes' text area. At the very bottom, there are 'Help', 'Move', and 'Close' buttons.

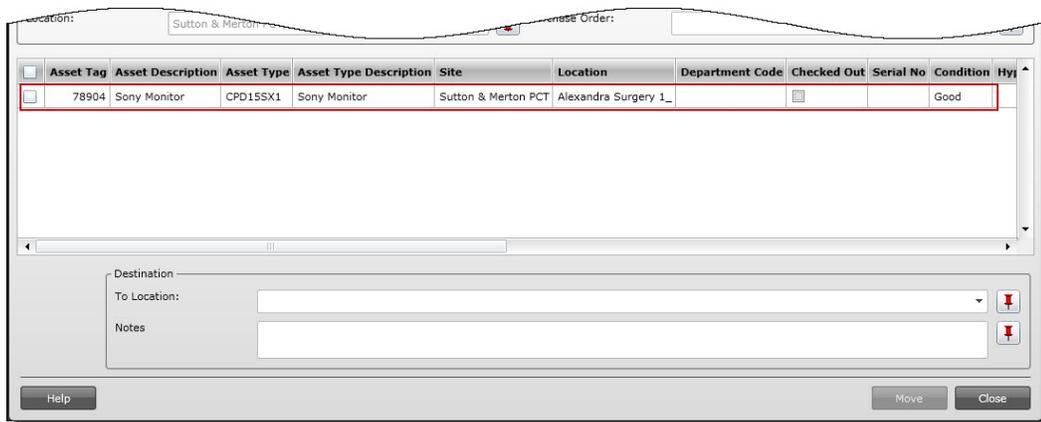
2. The **Move** screen offers two modes of asset selection - **Filter** and **Custom Filter**:
  - **Filter** is the default selection mode, allowing you to select the Assets you want to **Move** by specifying any combination of values for the four filter criteria: **Asset Tag**, **Location**, **Department** and **Purchase Order**.

**Note:** Pinning can be used with Move transactions. Pinning allows you to "lock" the information entered into a field. This is convenient if, for example, you are moving multiple assets for a particular site and location. You can enter the site and location once, then pin them. The fields will retain the information you entered through each new entry until you unpin them. In the example screen

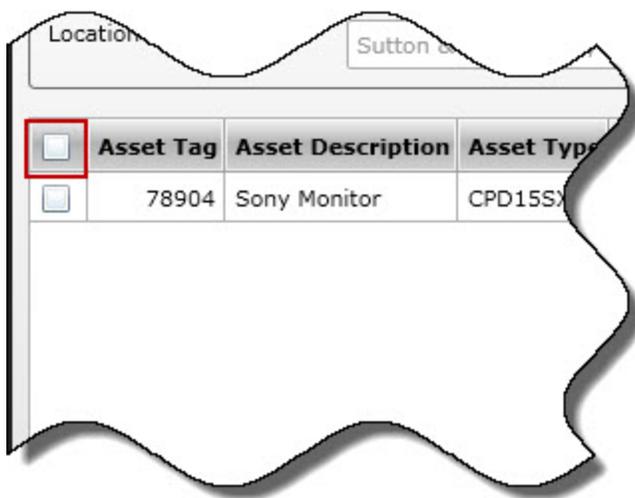
shown below, values are entered in the Location and Department Code fields. These fields were Pinned by clicking on their pushpins, causing them to look like they are pushed in. Click the pushpin again to unlock the pin.



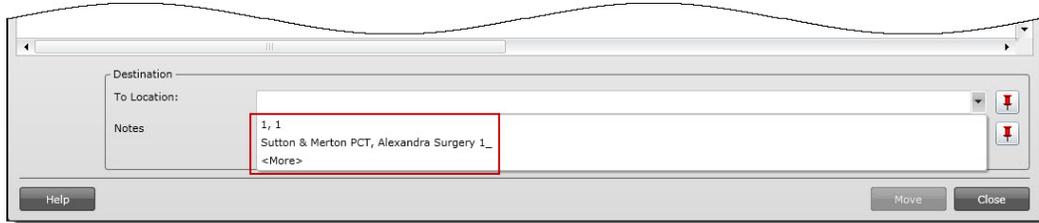
3. The assets matching your criteria will appear in the grid. You can manually limit the list of assets further by selecting the checkbox in front of only those assets in the list you want to move.



The **Select All** checkbox can be used to highlight all the records found by your choice of filter criteria.



4. After you have selected the assets you want to move, you need to select the **To Location**. Notice that the items listed in the **To Location** drop down list consist of both a Site and a Location at that Site. Select a recently used **To Location** from the drop down, select **<More>** to select a location from the Location List.



5. Click the **Move** button when you are ready to move the selected assets to the new location..

Click **Close** when you are ready to exit the **Move** function.

---

## Checking Out Assets

The **Check-Out Asset** function, provides the ability to check-out assets to a customer or employee, specifying a due date and time by which the asset should be returned. Keep in mind that you can set the check out length to only consider weekdays and the due date to only fall on a weekday on the **Options** screen.

1. To access this function, from the **Main Menu** click **Asset Management > Check-Out**.

You can also access this feature from the **Asset List** by highlighting the asset you want to check-out, then clicking the Check-Out button on the Asset List toolbar. When accessed this way, the selected asset's information will be pre-populated on the screen. For more information on using the Asset List, [click here](#).

2. The **Check-Out** function offers two modes of asset selection - **Filter** and **Custom Filter**:

**Filter** is the default selection mode, allowing you to select the Assets you want to Check-Out by specifying any combination of values for the four filter criteria: Asset Tag, Description, Location, and Category.

**Pinning** (Pinning allows you to "lock" the information entered into a field. This is convenient if, for example, you are entering multiple new assets for a particular site and location. You can enter the site and location once, then pin them. The fields will retain the information you entered through each new entry until you unpin them. In the example screen shown below, values are entered in the Site, Location and Department Code fields. These three fields were Pinned by clicking on their pushpins, causing them to look like this. Click the pushpin again to unlock the field for entry of a different value.) can be used with Check-Out transactions.

**Custom Filter** may be selected instead of Filter. This makes use of the **Simple Find** or **Advanced Find** pages to select the assets you want to Check-Out.

3. After applying your choice of filter criteria, you can manually limit the list of assets further still by using **CTRL** and the left mouse button, clicking to highlight only those assets in the assets available to check-out list that should be **Checked-Out**, then click the **>** button to move them to the assets pending check-out list. All the listed assets can be shifted to

the assets pending check-out list via the >> button.

The **Select All** button can be used to highlight all the records found by your choice of filter criteria. **De-Select All** can be used to clear any selections previously made.

The **Detail** button will open the **Edit Asset** screen for a highlighted record, to view or modify the asset record prior to doing the **Check-Out**. If more than one record is selected, the **Detail** button will be disabled.

4. When you are satisfied with the assets accumulated in the assets pending check-out list, you can optionally apply **Notes** to the transaction, then specify either a **Customer** or an **Employee** to whom the asset will be checked out.
5. Next, enter a **Due Date** (and time) for this asset.

You have three options for selecting a **Due Date**.

- **Use each asset's checkout duration** - highlight a pending asset in the **Assets pending Check-Out** window. The selected asset's due date will appear in the window. The due date is based on the check out length set for the selected asset or asset type.
- **None** - No due date will be assigned.
- **Custom** - You can set a specific due date for all assets in the list. Highlight the asset in the **Assets pending Check-Out** window, then enter a date and time in the fields provided.

Keep in mind if you are checking out a linked asset and the **Transact as Whole** flag is checked for the group, if you choose to use the default due date (rather than entering a new due date, MobileAsset will search all linked assets to find the maximum checkout duration. The maximum length is used to calculate the due dates for all the linked assets. This ensures that all the assets in the transaction have the same due date even if some of the linked assets have different checkout durations.

6. You can optionally change the location of the asset being checked out using the **Change Location To** field. For instance, you would use this feature if you are checking the asset out to someone at a different location, such as another building or warehouse. To change the location, select a location from the **Change Location To** drop down list.
  7. Enter a number in the **Print Receipt - Copies** box to print **Check-Out** receipts for this transaction.
  8. When the required fields have been satisfied, the **Check-Out** button will be enabled. Click it to post the transaction or click the **Close** button to exit without checking out the asset.
-

## Checking In Assets

The **Check-In** asset function is used to **Check-In** assets that are currently checked out to a **Customer** or **Employee**.

1. To access the **Check-In** feature, from the **Main Menu**, select **Asset Management > Check-In**. The To access the Check-In feature, from the Main screen, select Asset Management > Check-In. The Check-In screen shown below appears.

You can also access this feature from the **Asset List** by highlighting the asset you want to check-in, then clicking the **Check-In** button on the **Asset List** toolbar. When accessed this way, the selected asset's information will be pre-populated on the screen. For more information on using the **Asset List**, click here. screen shown below appears.

You can also access this feature from the **Asset List** by highlighting the asset you want to check-in, then clicking the **Check-In** button on the **Asset List** toolbar. When accessed this way, the selected asset's information will be pre-populated on the screen. For more information on using the **Asset List**, please refer to the topic [Working with Lists](#).

2. After applying your choice of filter criteria, you can manually limit the list of assets further by using **CTRL** and the left mouse button, clicking to highlight only those assets in the **Assets Checked-Out** list that should be **Checked-In**, then click the **>** button to move them to the assets ready to check-in list. All the listed assets can be shifted to the assets ready to check-in list using the **>>** button.

The **Select All** button can be used to highlight all the records found by your choice of filter criteria. **De-Select All** can be used to clear any selections previously made.

The **Detail** button will open the **Edit Asset** screen for a highlighted record, to view or modify the asset record prior to doing the **Check-In**. If more than one record is selected, the **Detail** button will be disabled.

When you are satisfied with the assets accumulated in the assets ready to check-in list, you can optionally apply **Notes** to the transaction.

When the **Print Receipt - Copies** box has a value greater than zero, one or more **Check-In** receipts will be printed for this transaction.

3. You can optionally add **Notes** to these assets by clicking the **Notes** button or enter a Check In location in the **Location** field. Select a new location for the asset will check the asset into the selected location, effectively moving it from its former location.
  4. When the required fields have been satisfied, the **Check-In** button will be enabled. Click it to post the transaction or click the **Close** button to exit without checking in the asset.
-

## Transferring Checked Out Assets

The **Transfer Checkout** function allows you to transfer physical possession of a checked out item from one person to another or to another location. Transferring a checked out asset prevents you from having to check the asset back in, then check it out again to another person. If the asset won't be returning to your company's possession before going to another customer or employee, use this function to transfer it.

Keep in mind that you can set the check out length to only consider weekdays and the due date to only fall on a weekday on the [Options](#) screen.

1. From the **Main Menu**, click **Asset Management > Transfer Check Out**. The **Transfer Check Out** page appears.

This screen is similar to the **Check Out** screen.

2. The **Transfer Check-Out** function offers two modes of Asset selection - **Filter** and **Custom Filter**:

**Filter** is the default selection mode, allowing you to select the Assets you want to **Check-Out** by specifying any combination of values for the four filter criteria: **Asset Tag**, **Description**, **Location**, and **Category**.

**Note: Pinning** is available on this screen. **Pinning** allows you to "lock" the information entered into a field. This is convenient if, for example, you are entering multiple new assets for a particular site and location. You can enter the site and location once, then pin them. The fields will retain the information you entered through each new entry until you unpin them. In the example screen shown below, values are entered in the **Site**, **Location** and **Department Code** fields. These three fields were **Pinned** by clicking on their pushpins, causing them to look like this. Click the pushpin again to unlock the field for entry of a different value.

3. After applying your choice of filter criteria, you can manually limit the list of Assets further still by using **CTRL** and the left mouse button, clicking to highlight only those Assets in the **Assets available to check-out** list that should be **Checked-Out**, then click the **>**

button to move them to the Assets pending check-out list. All the listed Assets can be shifted to the Assets pending check-out list via the >> button.

The **Select All** button can be used to highlight all the records found by your choice of filter criteria. De-Select All can be used to clear any selections previously made.

Specify either a **Customer No.** or an **Employee No.** You can optionally enter **Notes** on the transaction by typing in the Notes field.

4. Next, enter a **Due Date** (and time) for this asset.

You have four options for selecting a Due Date.

- **Use each asset's existing due date** - highlight a pending asset in the Assets Available for Transfer window. The selected asset's due date will appear in the field.
  - **Recalculate using asset's checkout duration** - The due date is based on the check out length set for the selected asset or asset type.
  - **None** - No due date will be assigned.
  - **Custom** - You can set a specific due date for all assets in the list. Highlight the asset in the Assets pending Check-Out window, then enter a date and time in the fields provided.
5. Keep in mind if you are checking out a linked asset and the **Transact as Whole** flag is checked for the group, if you choose to use the default due date (rather than entering a new due date, MobileAsset will search all linked assets to find the maximum checkout duration. The maximum length is used to calculate the due dates for all the linked assets. This ensures that all the assets in the transaction have the same due date even if some of the linked assets have different checkout durations

When the **Print Receipt on Transfer Check-Out Copies** box has a value greater than zero, one or more Check-Out receipts will be printed for this transaction.

Check the **Show Location on Receipt** checkbox if you want the transfer location to appear on the receipt.

6. When information has been entered in all required fields, the **Transfer Check-Out** button will be enabled. Click it to post the transaction or click the **Close** button to exit without checking out the asset.
-

## Disposing of Assets

The **Dispose** function is used to delete one or more assets from your database. You will use this function when you no longer have an asset.

Keep in mind that once disposed, assets cannot be "un-disposed", meaning there is no way to reactivate the asset. You would need to create a new asset if the asset is found. There may be situations where you will want to move an asset to a temporary location, rather than disposing of it, if the asset is misplaced. For example, if you regularly have items that are not found during an audit, but are found later, you may not want to dispose of them. Moving them to a temporary location you set up in MobileAsset enables you to move them back to their regular location when they are found. Disposing of these assets requires you to create a new asset later if they are found.

1. To access the **Dispose** screen from the **Main** screen click **Asset Management > Dispose**. The **Dispose** screen shown below appears.

You can also access this screen from the **Asset List** by highlighting the asset you want to **Dispose**, then click the **Dispose** button on the toolbar. For more information on using the Lists, please refer to the [Working with Lists](#) topic.

2. You can search for specific assets using the **Filter** or the **Custom Filter** at the top of the screen.

**Filter:** This is the default selection mode and allows you to select assets by specifying any combination of values for the four filter criteria: **Asset Tag**, **Location**, **Department** and **Purchase Order**.

**Pinning** can be used with **Dispose** transactions. Pinning allows you to "lock" the information entered into a field. This is convenient if, for example, you are entering multiple new assets for a particular site and location. You can enter the site and location once, then pin them. The fields will retain the information you entered through each new entry until you unpin them. In the example screen shown below, values are entered in the Site, Location and Department Code fields. These three fields were **Pinned** by clicking on their pushpins, causing them to look like this. Click the pushpin again to

unlock the field for entry of a different value.

**Custom Filter:** This feature uses the **Simple Find** or **Advanced Find** screens to select the assets you want to dispose.

3. The assets matching your criteria will appear in the grid. You can manually limit the list of Assets further by highlighting only those assets in the list you want to dispose. To multi-select, hold down the **CTRL** key while clicking on assets with your mouse.

The **Select All** button can be used to highlight all the records found by your choice of filter criteria. **De-Select All** can be used to clear any selections previously made.

The **Detail** button will open the **Edit Asset** page for a highlighted record, to view or modify the Asset record prior to disposing of it. If more than one record is selected, the **Detail** button will be disabled.

4. A **Disposal Reason** must be selected from the drop list. Reasons are: **Sale, Lost, Damaged, Trade In, Stolen** or **Other**.
  5. You can optionally apply **Notes** to the transaction.
  6. When you are finished entering information in the required fields, the **Dispose** button will be enabled. Click it to dispose of the selected assets or click the **Close** button to exit without disposing of any assets.
-

## Creating a Maintenance Entry

The **Maintenance Entry** screen is used to record maintenance activity for one or more assets. You can schedule maintenance on this screen and record when maintenance was completed and the condition of the asset.

1. To access this screen from the **Main Menu** select **Asset Management > Maintenance Entry**.

**OR**

From the **Main Menu**, select **Lists > Asset List**. Highlight an asset in the **Asset List**, then click the **Maintenance** icon on the toolbar. The **Maintenance Entry** screen appears. Note that if you access the **Maintenance Entry** screen from the **Asset List**, the page will appear populated with the selected asset's information and any scheduled maintenance.

The screenshot shows the 'Maintenance Entry' interface. At the top, there's a 'Filter' section with four dropdown menus: 'Asset Tag', 'Location', 'Department', and 'Date Due'. Below this is a 'Select Assets' section containing a table with columns: Asset Tag, Asset Description, Maint. Desc., Due Date, Asset Type, Asset Type Description, Serial No, Site, Location, Department Code, Custom Date 1, and Custom Date 2. The table is currently empty. Below the table is the 'Completion Information' section, which includes a 'Complete' checkbox, a 'Date' field with the value '7/19/2010', a 'Condition' dropdown, a 'Cost' field with the value '0.00', and a 'Description of maintenance' text area. At the bottom of the screen are three buttons: 'Help', 'Save', and 'Close'.

2. On the **Maintenance Entry** screen, you can filter assets to locate those you want to create an entry for using the **Filter** options.

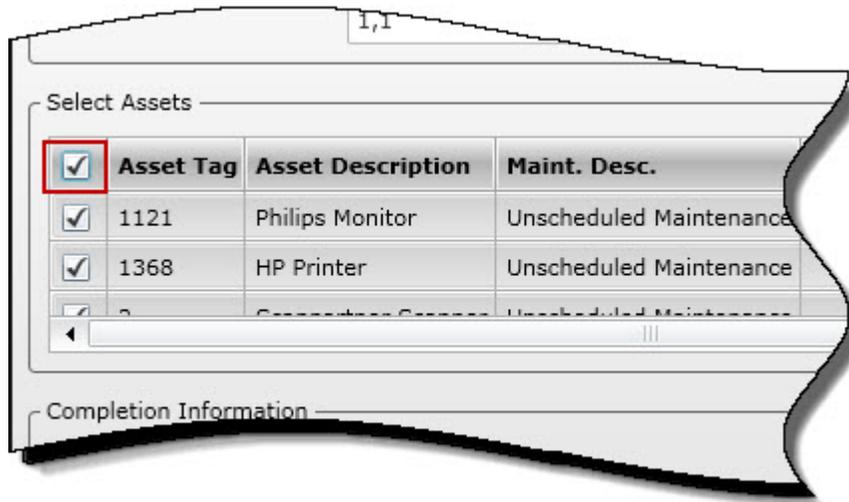
**Filter** allows you to select the assets for which you want to record a **Maintenance Entry** by specifying any combination of values for the four filter criteria: **Asset Tag**, **Location**, **Department** and **Date Due**.

**Date Due** will select those assets with a scheduled **Next Date** that occurs on or before the **Date Due** specified. The **Next Date** is set on the **Edit Asset > Maintenance** tab.

**Note: Pinning** can be used with **Maintenance Entry** transactions. Pinning allows you to "lock" the information entered into a field. This is convenient if, for example, you are entering multiple new assets for a particular site and location. You can enter the site and location once, then pin them. The fields will retain the information you entered through each new entry until you unpin them. In the example screen shown below, values are entered in the Site, Location and Department Code fields. These three fields were **Pinned** by clicking on their pushpins, causing them to look like this. Click the pushpin again to unlock the field for entry of a different value.

3. The assets matching your criteria will appear in the grid. You can manually limit the list of assets further by highlighting only those assets in the list for which you want to create a maintenance entry. To multi-select, hold down the **CTRL** key while clicking on assets with your mouse.

If you want to select all assets that appear in the grid, check the box in the top left corner of the grid:



4. If the maintenance is completed, select the **Complete** checkbox. You can also specify a **Completion Date**, the asset's current **Condition** and the **Cost** of the maintenance. The **Complete** checkbox does not need to be selected to enter a **Completion Date**, **Condition** or **Cost**.
5. Enter a **Description of Maintenance** for this **Maintenance Entry**. The **Description of Maintenance** field allows you to enter a brief overview of the maintenance performed. You can type a one-time entry into the **Description** field, or you can set up recurring descriptions from which you can select.
  - a. To setup descriptions, click the ... button above the **Description of Maintenance** field.



The **Maintenance Selection** screen appears:

**Maintenance Selection** [Close]

Maintenance Selection

Maintenance Short Name Description

Battery Check - Printer

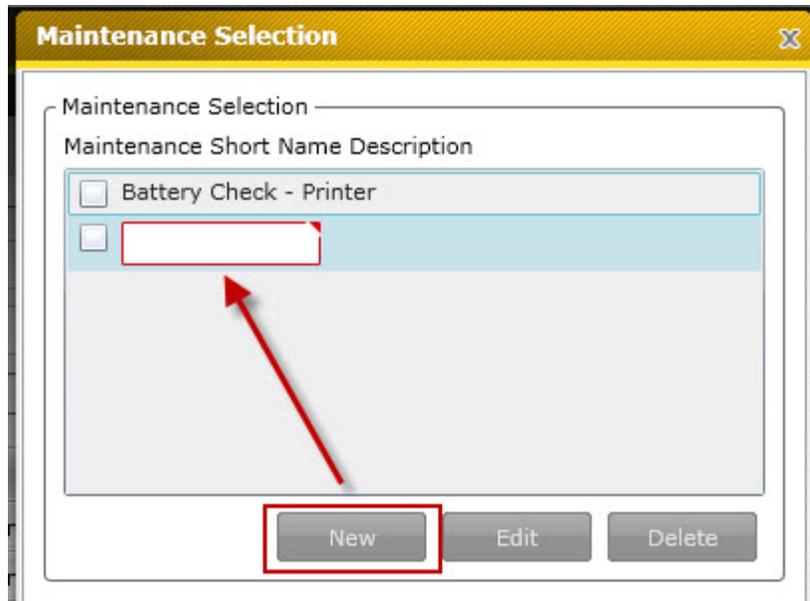
[New] [Edit] [Delete]

Details

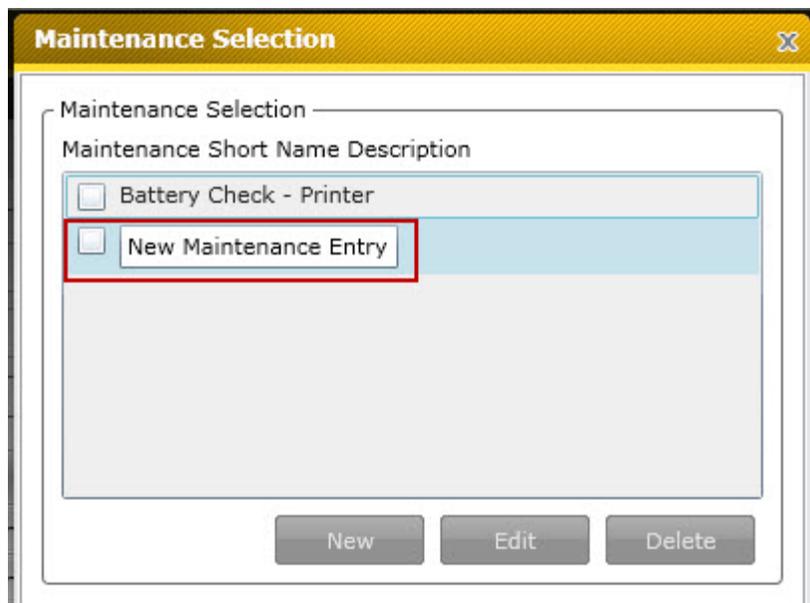
[Apply] [Discard]

[Help] [OK] [Cancel]

- b. Any descriptions you already have setup will appear in the **Maintenance Short Name Description** field. To enter a new description, click the **New** button. A new entry will appear in the **Maintenance Short Name Description** field:



- c. Enter a name for this maintenance.



- d. Click in the **Details** section, then type in the description for this maintenance.

**Maintenance Selection**

Maintenance Selection

Maintenance Short Name Description

Battery Check - Printer

New Maintenance Entry

New Edit Delete

Details

Type a description of the maintenance to be performed here.

Apply Discard

Help OK Cancel

- e. Click **Apply** to save your changes.
- f. Select which maintenance description you want to use by checking the desired listing, then click the **OK** button.

**Maintenance Selection**

Maintenance Selection

Maintenance Short Name Description

- Battery Check - Printer
- New Maintenance Entry

New Edit Delete

Details

Make sure battery is fully charged.  
Replace as needed.

Apply Discard

Help OK Cancel

Your selection will be added to the **Description of Maintenance** field.

<input checked="" type="checkbox"/>	1368	HP Printer	Unscheduled Maintenance	Inkjet 1320	HP Printer	CN0P14454663342115RL	1	1
-------------------------------------	------	------------	-------------------------	-------------	------------	----------------------	---	---

Completion Information

Complete:

Date: 7/19/2010

Condition: [dropdown]

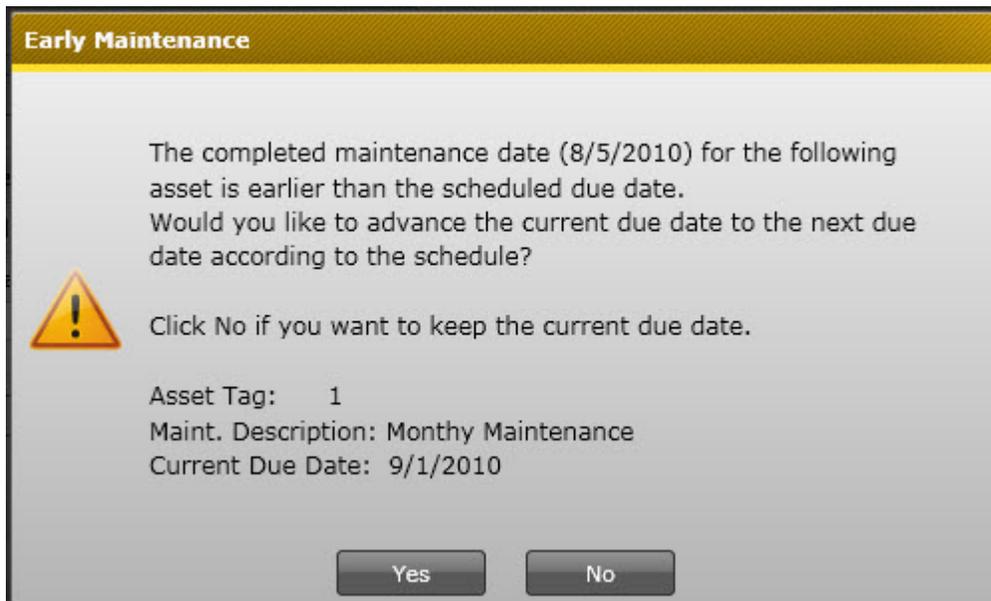
Cost: 0.00

Description of maintenance:  
Battery Check - Printer  
Make sure battery is fully charged.  
Replace as needed.

Help Save Close

- When all required fields have been completed, the **Save** button will be enabled. Click **Save** to save your changes or click the **Close** button to exit without recording a **Maintenance Entry**.

**Entering Maintenance Prior to Due Date:** If maintenance is entered for an asset before that maintenance schedule is due, the following screen appears:



Select **Yes** if you want to advance the schedule. This means the maintenance will be marked completed for this period and the due date will be moved to the next due date on the schedule.

Select **No** to keep the current due date. The maintenance will be marked completed but the due date will stay the same.

**Example:** Monthly maintenance is due on the 1st of every month. The current due date is September 1st. If the user enters maintenance for August 20th, he/she will see the screen above. If Yes is selected, the due date will advance to October 1st. If No is selected, the due date will remain September 1st.

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## Printing Labels/Asset Tags from the List Screens

MobileAsset Web allows you to print labels and asset tags directly from the **List** screens. The following **List** screens have label printing functionality:

- **Asset List** - Print Asset Tags
- **Employee List** - Print Employee Badges
- **Location List** - Print Location Labels

**Note:** You must select a label printer in the MobileAsset PC application prior to printing tags from the **List** screens. To do this, see the topic *Selecting a Label Printer* in the Mobile Asset Online Help.

### To Print Tags/Labels/Badges:

1. With the desired **List** screen open (**Asset**, **Employee** or **Location**), highlight the listing you want to print. You can select multiple listings by holding down the Ctrl key on your keyboard while clicking on listings.

2. Click the **Print Tags/Labels** button on the toolbar.

The following screen appears:

<SS>

3. Enter the number of labels you want to print for each selected item.
  4. Click the **OK** button.
-

# Administration

## Security

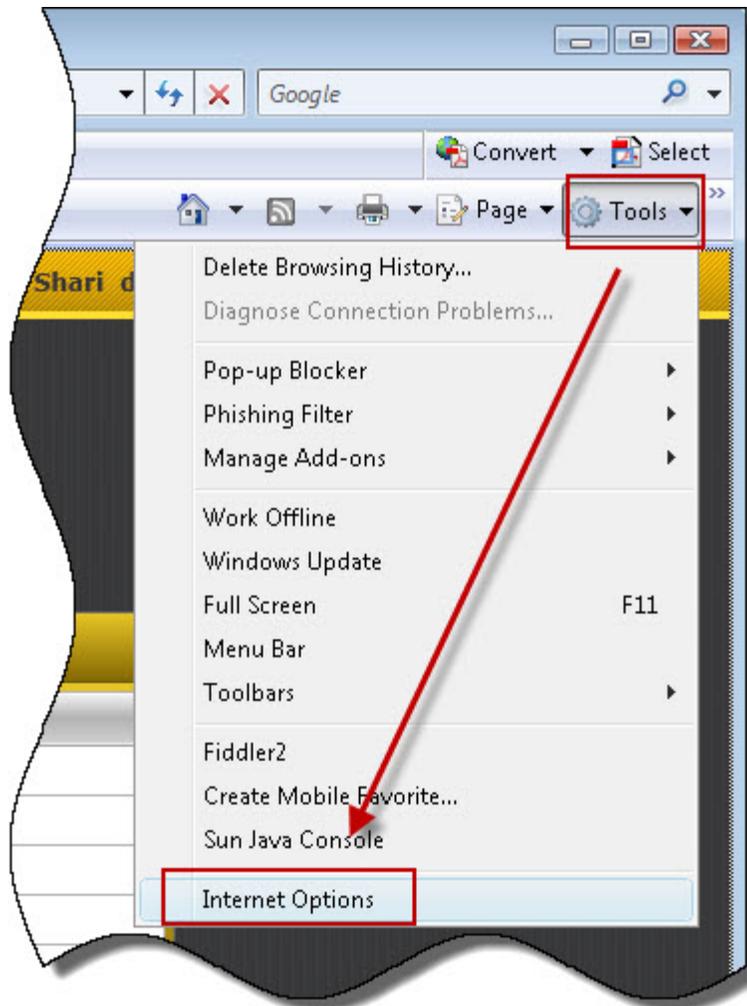
**Groups** and **Users** are setup in the MobileAsset PC application. If you need to make corrections/additions to your users or groups, you will need to do so on the PC. There are two ways you can setup users in the MobileAsset PC application to have access to the MobileAsset Web Module:

1. **Manually Enter Users:** Create **Groups** and **Users** using the MobileAsset PC application.
2. **Let MobileAsset Automatically Create User Profiles Using Windows NT Authentication:** If you are using Windows NT Authentication, you can setup a **Group** in MobileAsset that matches your group name in the Microsoft Active Directory. When users in this **Group** access MobileAsset for the first time their User account will be automatically created and added to the **Manage Users** screen in MobileAsset (PC application).

**Example:** You have a group in your Active Directory named My Users and you want everyone in My Users to have access to the MobileAsset Web Module. Create a **Group** with the name My Users in MobileAsset using the MobileAsset PC application. Now when each member of the **Group** My Users accesses MobileAsset, they will receive the usual **Windows Network Login Screen**. They should enter their normal Network **User Name** and **Password**. MobileAsset will recognize the Active Directory Group's name as matching the MobileAsset **Group** name and automatically create a **User** account for that user. You can then view those **User** accounts in MobileAsset (**Security > Manage Users**). Keep in mind that if you change the password on the user's MobileAsset User's account, they will receive the regular login screen and must enter the new password, rather than their network password.

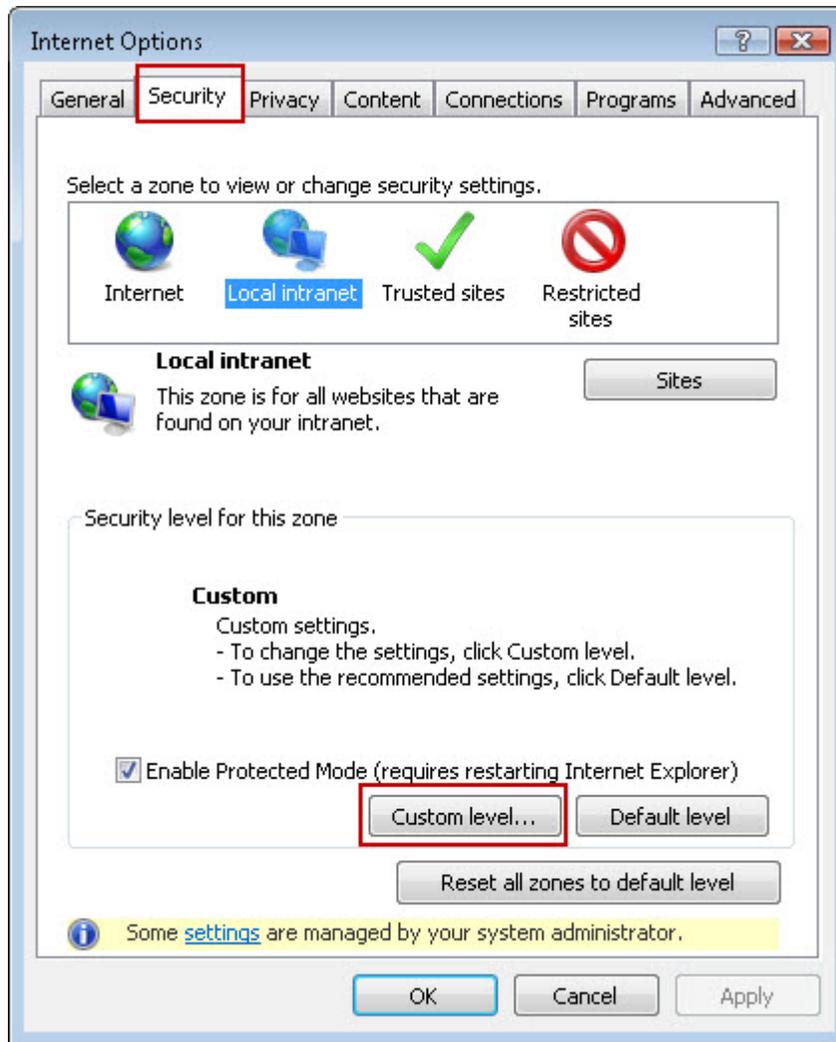
To prevent users from seeing the network login screen, complete the following steps in your Internet Browser:

- a. From your browser, go to **Tools > Internet Options:**



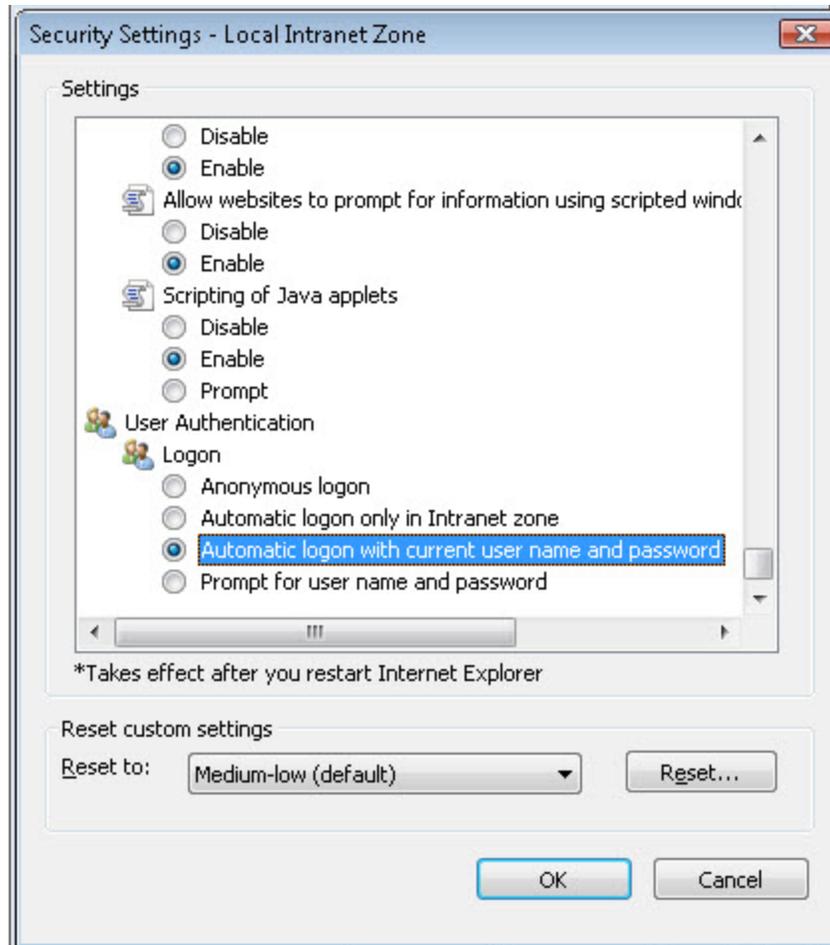
The **Internet Options** screen appears:

- b. On the **Internet Options** screen select the **Security** tab, then select **Local Intranet > Custom** levels.

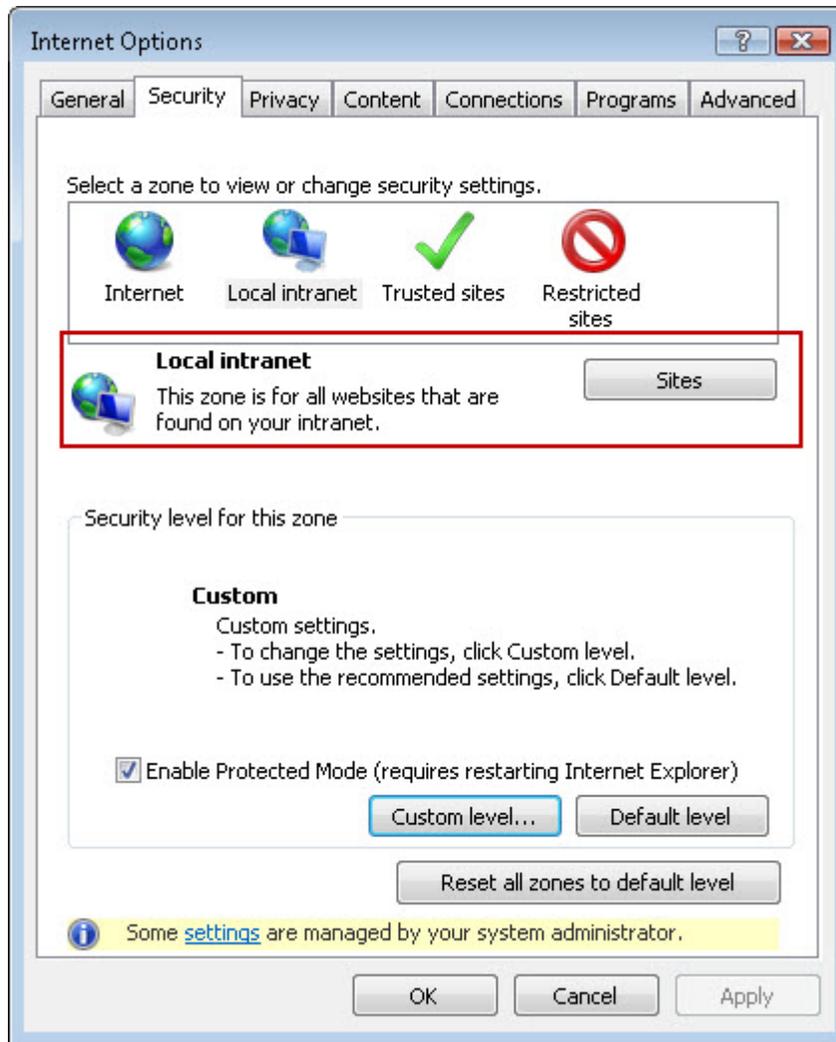


The **Security Settings** screen appears.

- c. On the **Security Settings** screen under **User Authentication**, make sure **Automatic Logon with Current User Name and Password** is selected.

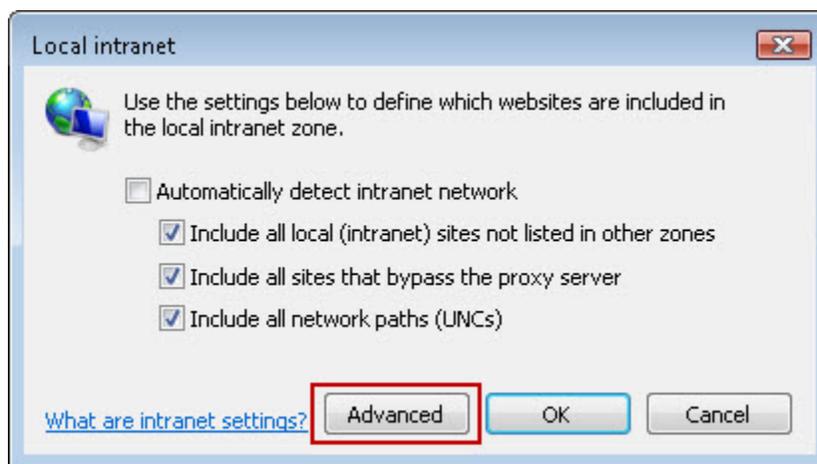


- d. Click **OK** to close the Security Settings screen.
- e. Select Local Intranet and the Sites button.

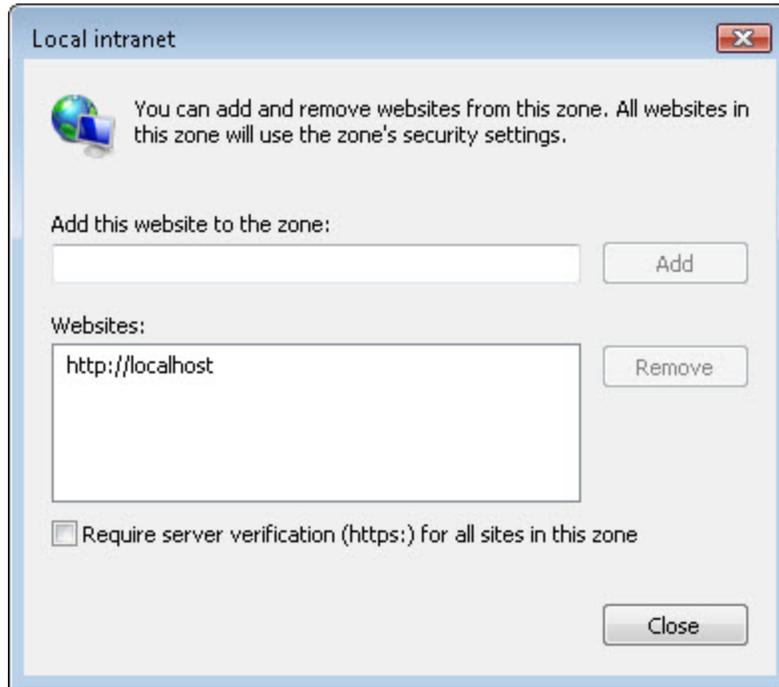


The **Local Intranet** screen appears.

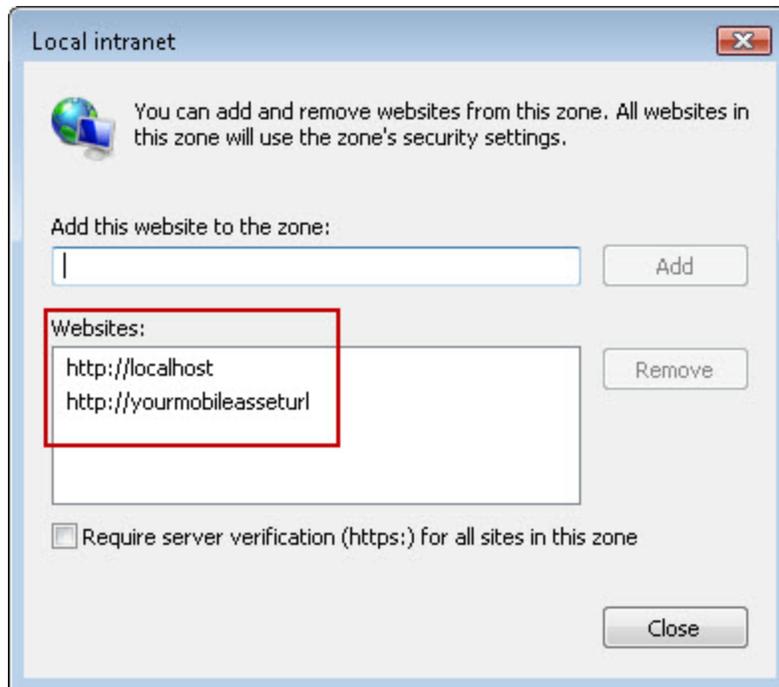
- f. Click the **Advanced** button.



- g. Enter the website address of your MobileAsset Web Module in the **Add this website to the zone** field and click the **Add** button.



The website will appear in the **Websites** list.



- h. Click **Close** to close the **Local Intranet** screen.
- i. Click **OK** to close the **Local Intranet** screen.

- j. Click **OK** to close the **Internet Options** screen.
- k. Restart your browser.

For more information on **Security** features in the MobileAsset PC application, please refer to the MobileAsset online help.

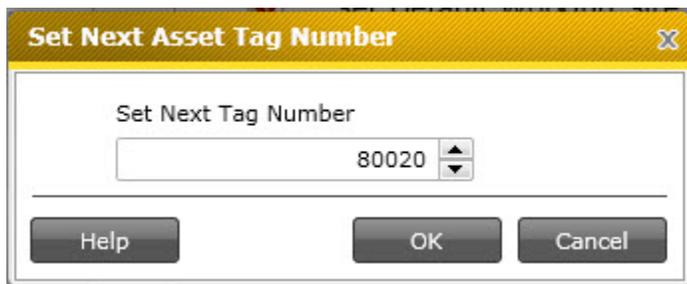
---

## Setting Next Asset Tag Number

The **Asset Tag** values created will be incremented by a value of one, beginning with the largest Asset Tag value that existed in the database when the option was first enabled. Beginning with an empty database, the first automatically assigned Asset Tag will be a value of "1000". You can change the first automatically assigned **Asset Tag** on the **Set Next Tag Value** screen.

**Note:** You must have the **Use Automatic Asset Tags** feature enabled on the **Options** screen to use this feature.

1. To access this screen from the **Main** screen, select **Administration > Set Next Asset Tag Number**. The **Set Next Asset Tag Number** screen appears allowing you to select a start number. Below is an example of the **Set Next Asset Tag Number** screen. In this example, assets with values of 1000, 1001 and 1002 were already entered in the system, so the next tag value the system would use is 1003.



2. Enter the number you want to begin with, then click **OK**.
-

# Options

## Options

The **Options** screen is where you can turn off and on some automatic processes for asset functions and control how the software performs in certain situations.

The following functions are controlled from the **Options** screen:

### Asset Options

[Allow Duplicate Serial Numbers](#)  
[Automatic Asset Tags](#)  
[Automatic New](#)  
[Checkout Duration Uses Week Day Only](#)  
[Decimal Places](#)  
[Due Date on Next Week Day](#)  
[Edit Inherited Asset Type Data](#)  
[Last Depreciation Date](#)

### Email Options

[Always Show Email Destination List](#)  
[SMTP Password](#)  
[SMTP Port](#)  
[SMTP Server](#)  
[SMTP SSL/TSL](#)  
[SMTP User](#)

### Support Options

[Check for Newer Label Versions](#)  
[Close New Form](#)  
[Max Row Count](#)

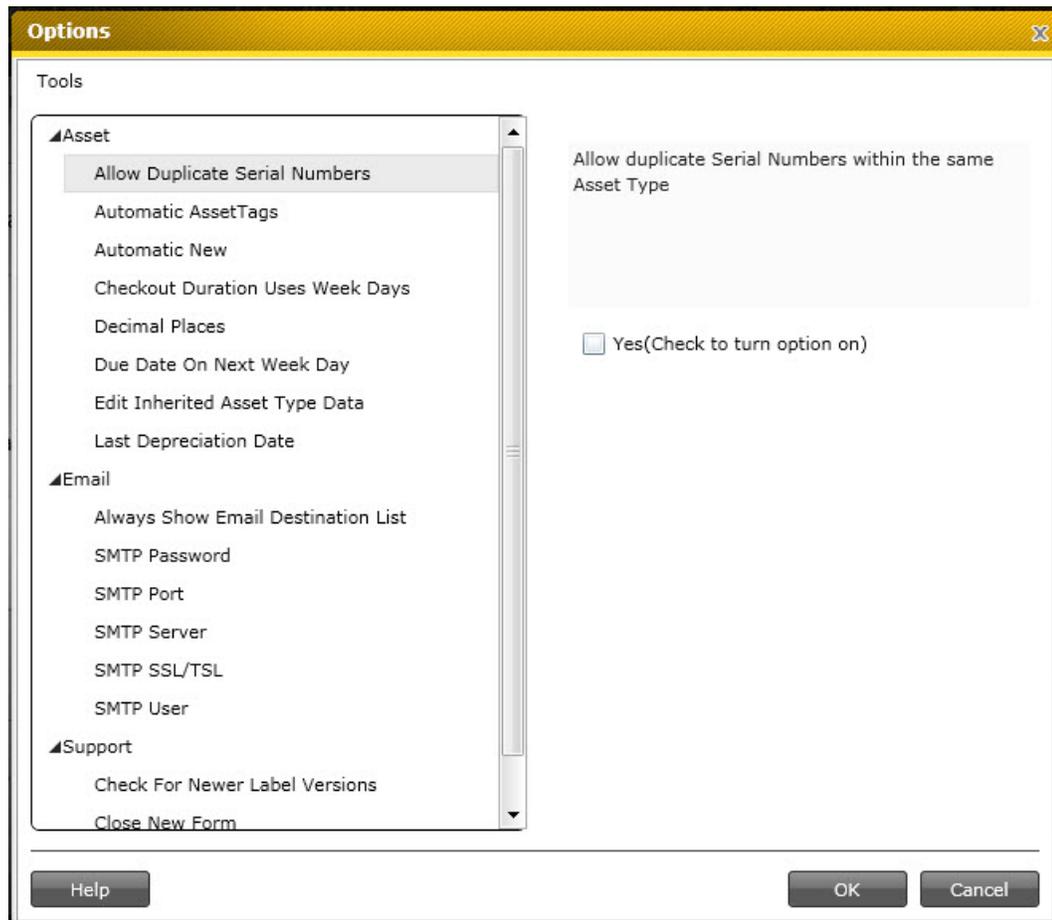
---

## Allow Duplicate Serial Numbers

The software allows you to have two assets that have the same **Asset Type** to also have the same serial number. This option is disabled, or turned off, by default. This option covers the possibility that a generic asset type that is not make- and model-specific might have to support assets which coincidentally have the same serial number from two different manufacturers.

You can enable this option by following the instructions below:

1. From the **Main Menu**, click **Administration > Options**. The **Options** screen appears.
2. On the **Options** screen, highlight **Allow Duplicate Serial Numbers**.



3. Enable the option by clicking the **Yes** checkbox.
4. Click **OK** to save the option and to close the **Options** screen.

## Automatic Asset Tags

This option automatically assigns **Asset Tags** when creating new assets or duplicating an existing asset. When this option is turned on, you will not be able to enter a tag into the asset tag field on the **New/Edit Asset** screens. The tag will be automatically generated when you click **Save** or click the button next to the **Asset Tag** field on the **New/Edit Asset** screens.

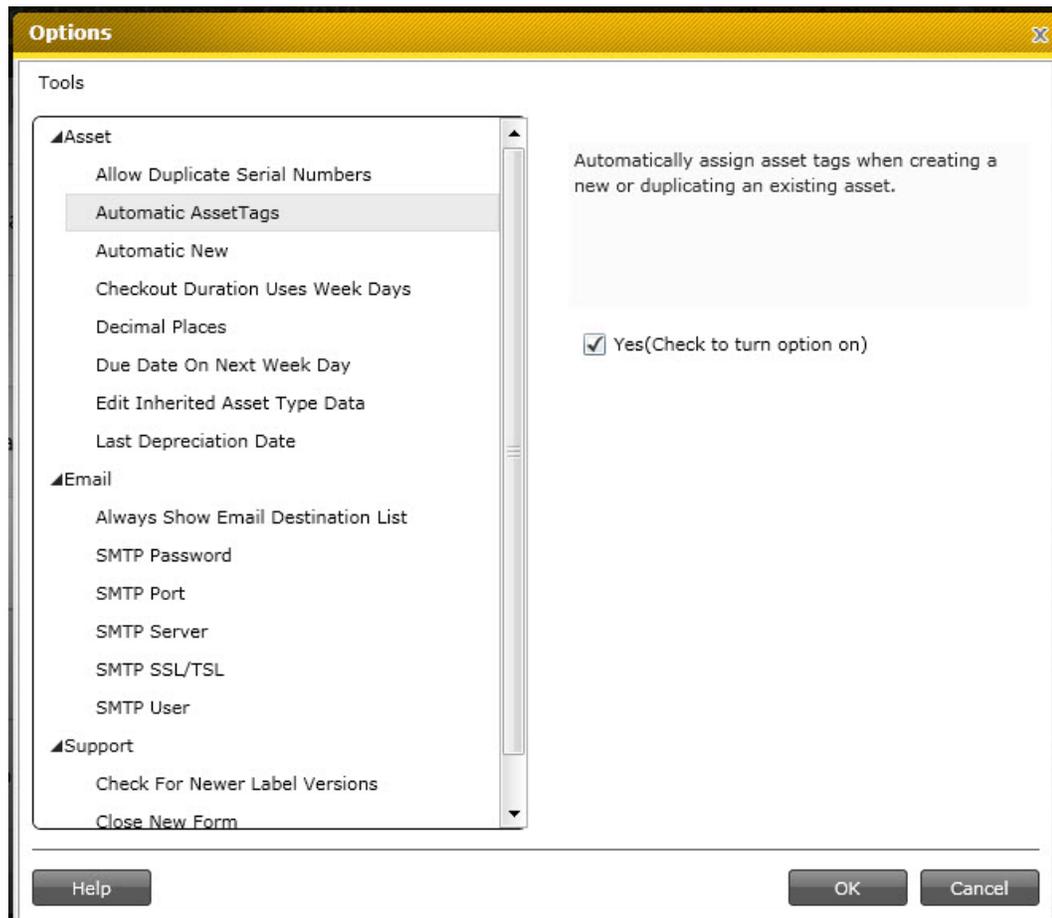
For information on setting the default tag number the system will begin with when assigning asset tags, see the section [Setting the Automatic Tag Numbers](#), below. This option is turned off by default.

The following topics are discussed in this section:

[Turning on the Automatic Asset Tags Feature](#)  
[Setting the Automatic Tag Number](#)

### Turning On the Automatic Asset Tags Feature:

1. To turn on this feature (it is turned off by default), from the **Main Menu**, click **Administration > Options > Automatic Asset Tags**. The **Options** screen appears.
2. On the **Options** screen, highlight **Automatic Asset Tags** and select the **Yes** checkbox.



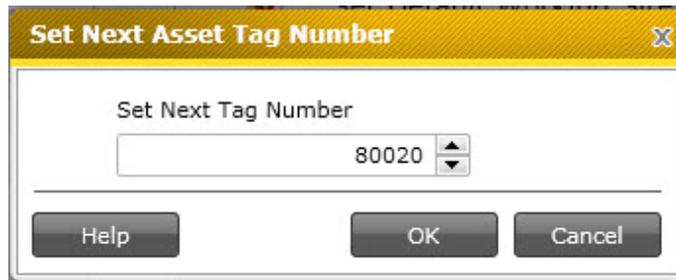
3. Select the **OK** button to implement the features you have chosen and to close the **Options** screen.

---

### Setting the Automatic Asset Tag Number:

The **Asset Tag** values created will be incremented by a value of one, beginning with the largest **Asset Tag** value that existed in the database when the option was first enabled. Beginning with an empty database, the first automatically assigned **Asset Tag** will be a value of "1000". You can change the first automatically assigned **Asset Tag** on the **Set Next Tag Value** screen.

1. To access this screen from the **Main** screen, select **Administration > Set Next Asset Tag Number**. The **Set Next Tag Value** screen appears allowing you to select a start number. Below is an example of the **Set Next Tag Value** screen. In this example, assets with values of 1000, 1001 and 1002 were already entered in the system, so the next tag value the system would use is 1003.



The screenshot shows a dialog box titled "Set Next Asset Tag Number". It features a yellow header bar with the title and a close button (X). Below the header is a text input field labeled "Set Next Tag Number" which contains the value "80020". At the bottom of the dialog, there are three buttons: "Help", "OK", and "Cancel".

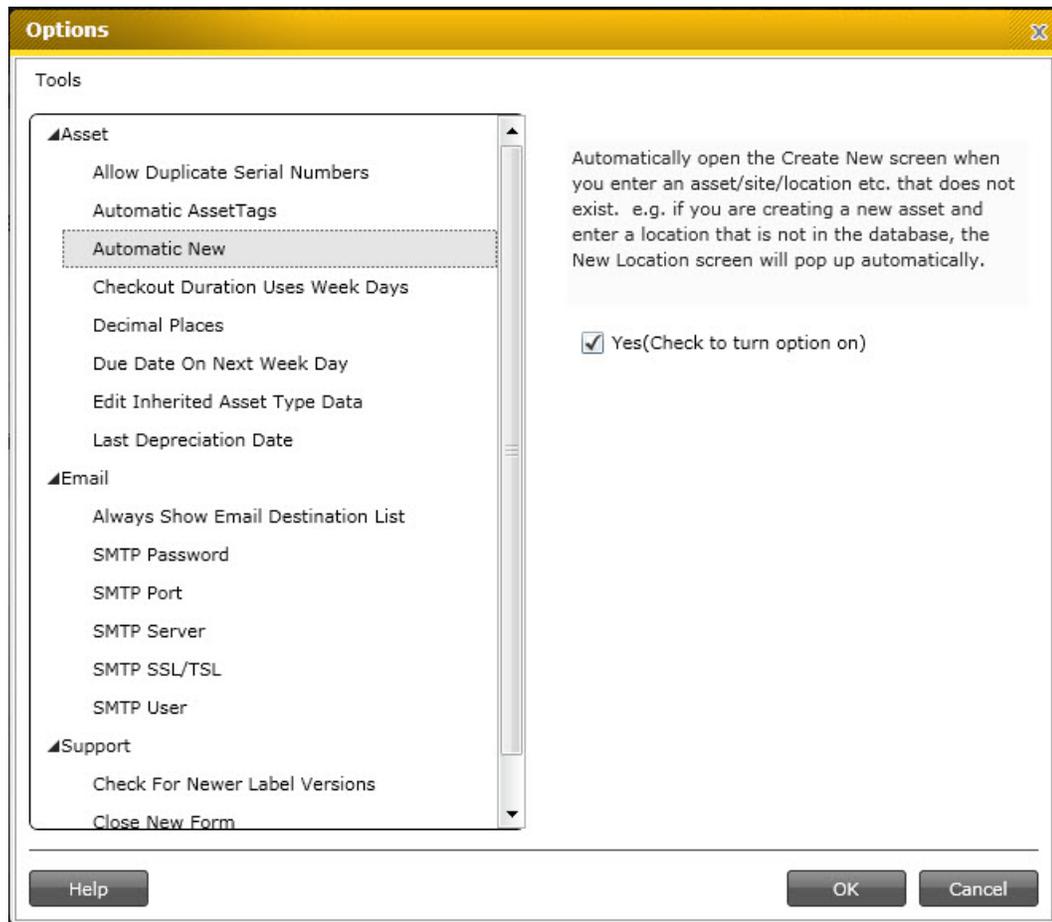
2. Enter the number you want to begin with, then click **OK**.
-

## Automatic New

The **Automatic New** option enables the system to automatically open the **Create New** screen when you enter an asset, site, location, depreciation class, etc. that is not already in the database. For example, if you are creating a new asset and enter a location in the Location field that does not currently exist in the database the **New Location** screen will appear allowing you to finish entering the new location. This option is off by default.

When this option is turned off, a message appears when a new asset, site, etc. is entered asking if you want to create the new item. If you select **Yes**, the **New** screen appears.

1. To enable this feature, from the **Main Menu**, click **Administration > Options**.
2. Highlight the **Automatic New** listing and select the **Yes** checkbox.
3. Click **OK** to save your changes.

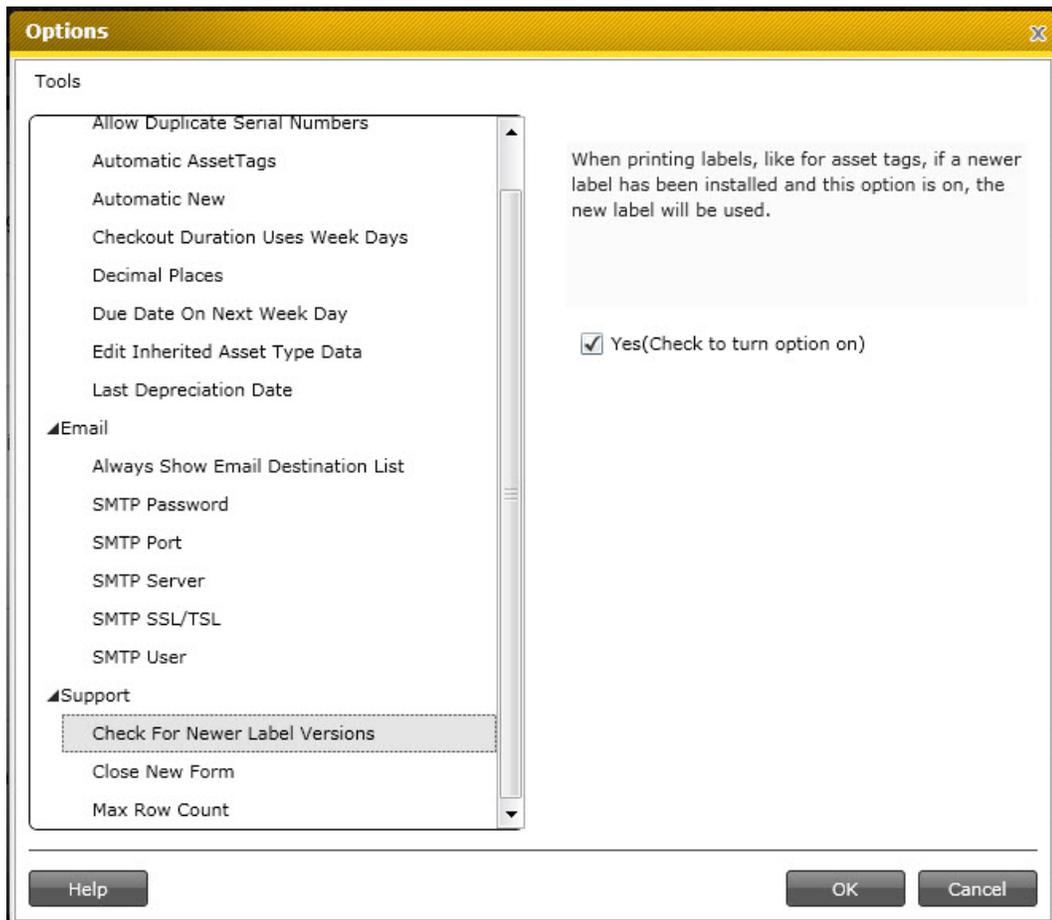


## Check for Newer Label Versions

This option tells MobileAsset to use the newest label version when printing labels. For example, if you are printing Asset Tags, MobileAsset will automatically use the label with the most recent saved date. This options is on by default.

### To Turn Off/On the Newer Label Versions Options:

1. From the **Main Menu**, click **Administration > Options**. The **Options** screen appears.
2. On the **Options** screen, highlight **Check for Newer Label Versions**.



3. Deselect the **Yes** checkbox to turn off the option. Select the **Yes** checkbox to turn the option on.
  4. Click **OK** to save your changes.
-

## Checkout Options

The **Options** screen (**Administration > Options**) allows you to set two options regarding checking out assets:

[Checkout Duration Uses Week Days](#)  
[Due Date On Next Week Day](#)

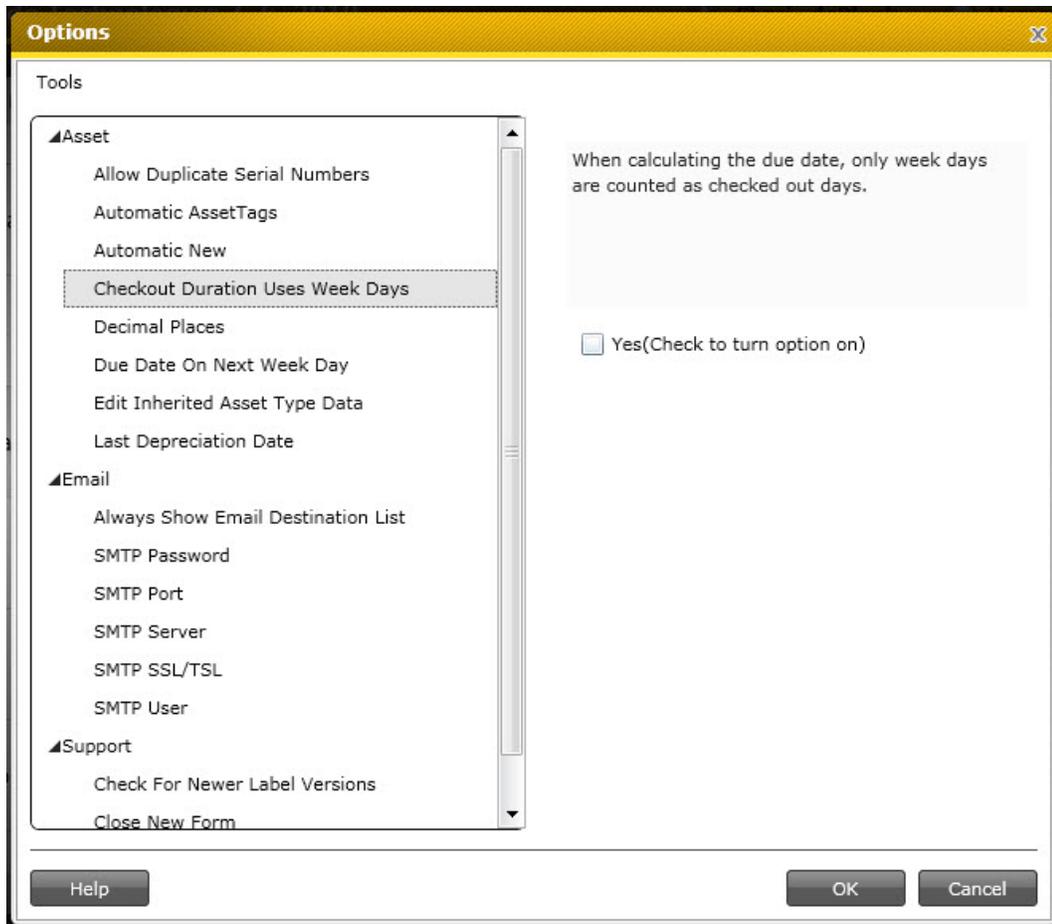
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### Checkout Duration Uses Week Days

When this option is turned on, MobileAsset will not consider weekends when calculating the **Checkout Duration**. For example, assume you set the **Checkout Duration** (on the **Asset Type > General** tab) to 4 days and turn this option on. If an asset of this type is checked out on a Thursday, it will be due back the following Wednesday because the two weekend days are not considered in the calculation. If the option is turned off and the asset is checked out on a Thursday, it will be due back the following Monday.

To set the checkout duration option:

1. From the **Main Menu**, click **Administration > Options**. The **Options** screen appears.
2. On the **Options** screen, highlight **Checkout Duration Uses Week Days**:



3. Select the **Yes** checkbox to turn on this option.

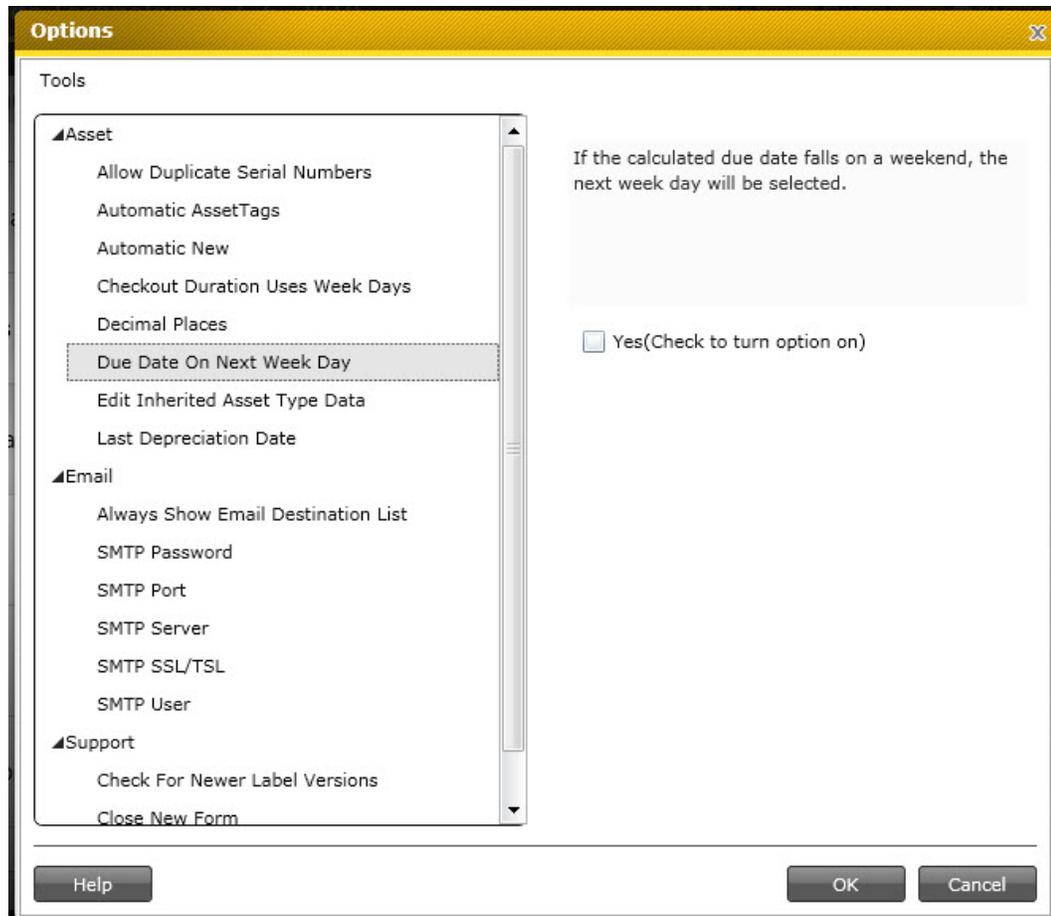
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### Due Date On Next Week Day

When this option is turned on, the due date will always fall on a weekday. For example, if you turn this option on, if an assets due date would normally fall on a weekend, it is automatically bumped to the next weekday. This means that if the due date were to fall on a Saturday, it would be moved to Monday.

You can enable this option by following the instructions below:

1. From the **Main** screen, click **Administration > Options**. The **Options** screen appears.
2. On the **Options** screen, highlight **Due Date on Next Week Day**:



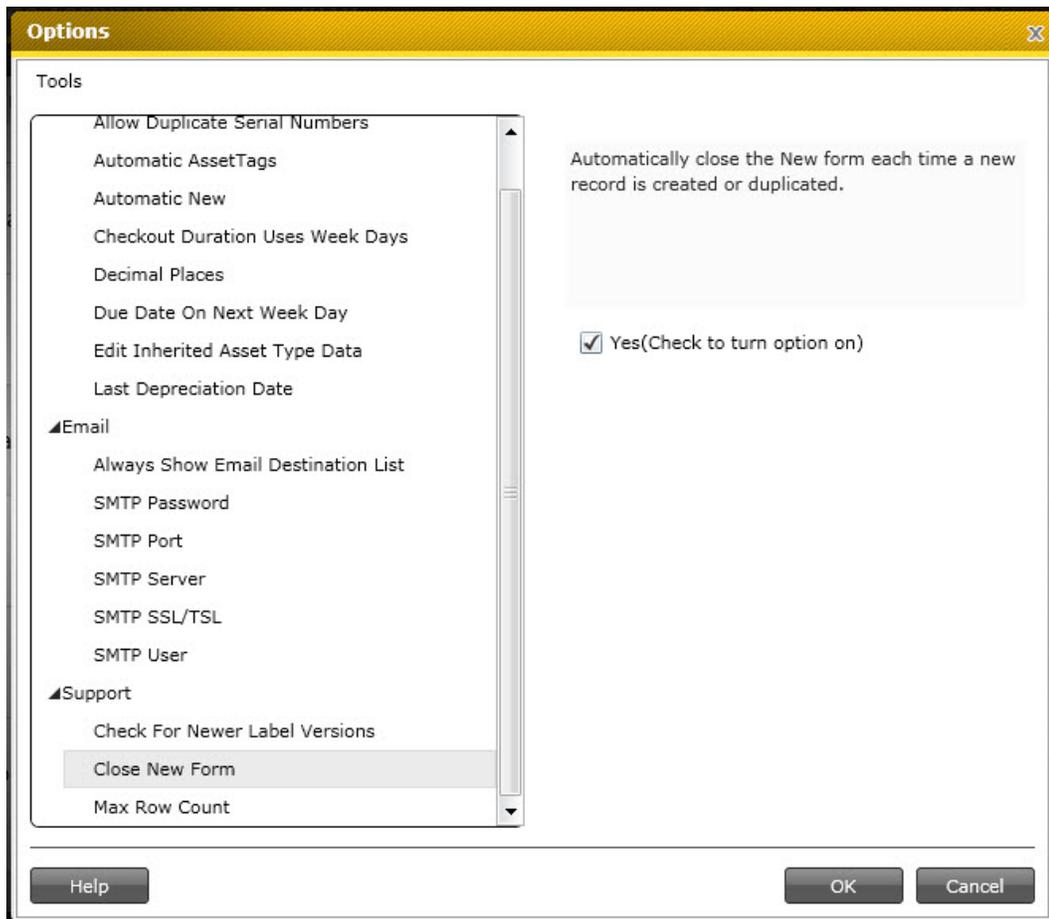
3. Select the **Yes** button to enable the option.
-

## Close New Form

The **Close New Form** function enables the system to automatically close the **New** screen each time a new record is created. If the feature is turned on (enabled), after you enter a new item and click **OK** on the New screen, the screen will clear of information and remain open allowing you to enter another new record. If it is turned off (disabled), the New screen will close each time a new record is saved.

This option can only be enabled/disabled by a user set up in the **Admin Group** in **Security**. The **Close New Form** option is turned **ON** by default.

1. To enable/disable this feature, from the **Main Menu** click **Administration > Options**.
2. On the **Options** page, highlight the **Close New Form** listing and select the **Yes** checkbox to enable the feature or make sure the checkbox is not selected to disable it.



You may want to turn this option off when first entering data to speed up the process, then turn it on later to avoid confusion when using it infrequently.

## Decimal Places

This option allows you to set the number of decimal places to display in numeric fields (where possible).

All values entered in numeric fields are stored in the database with up to 4 decimal places. You may not want to display all four decimal places on your list screens and reports, so you can designate the number of decimal places, from 1 to 4, that will display.

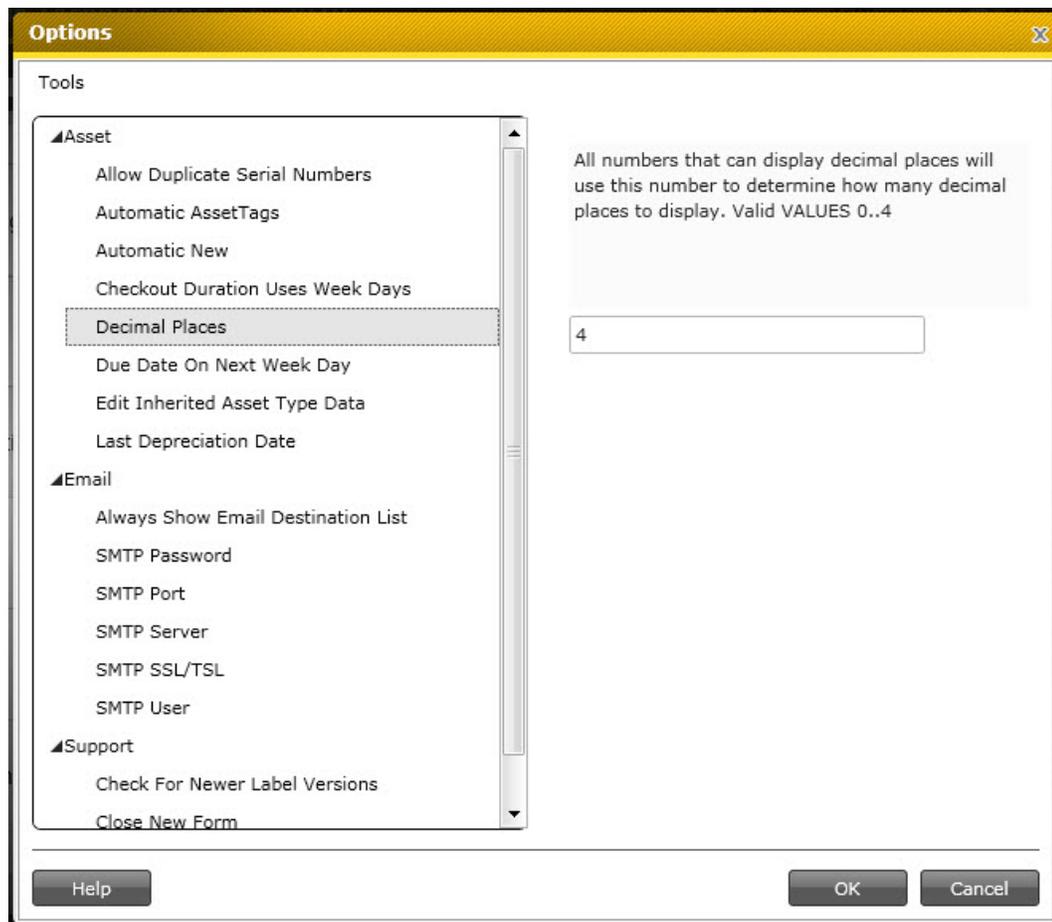
The following topics are discussed in this section:

- [Setting the Decimal Places Option](#)
- [Changing the Decimal Places Option](#)
- [Searching for Data with Truncated Decimal Places](#)

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### Setting the Decimal Places Option

1. From the **Main** screen, click **Administration > Options**. The **Options** screen appears.
2. Highlight the **Decimal Places** option:



3. In the text field, enter the number of decimal places you want to display. You can enter 0 through 4. The default setting is 2 decimal places.
4. Click the **OK** button when you are done entering information.

---

### Changing the Decimal Places Option

If you change the number of allowed decimal places to a great number (1 to 4, for example) any digits stored prior to the change will display with trailing zeros. For example, if a value of 25.5 was stored when the Decimal Places option was set to 1, it will be displayed as 25.500 if the Decimal Places option is later set to 3.

If you change the number of allowed decimal places to a lesser number (4 to 1, for example) any digits stored prior to the change will be rounded. For example, if a value of 25.5 was stored when Decimal Places was set to 1, it will be displayed as 26 if Decimal places is later set to 0. (Values rounded for display at the currently specified number of Decimal Places will retain their original number of decimal places as stored in the database.)

---

### Searching for Data with Truncated Decimal Places

Keep in mind that your numbers are stored with up to four decimal places. If you set the Decimal Place option to 1, but your numbers contain 4 decimal places, it will be helpful to search using all the decimal places. For example, if you are searching for the numbers: 4.123, 4.134, 4.148 but the Decimal Places option is set to one decimal place showing, the Asset List will displays these numbers as 4.1, 4.1, 4.1. If you are attempting to use the Find feature to search for a specific number, you can type in all decimal places, 4.123, for example to make your search easier. However, when they go into the Find, they will be able to see all the decimal places.

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## Edit Inherited Asset Type Data

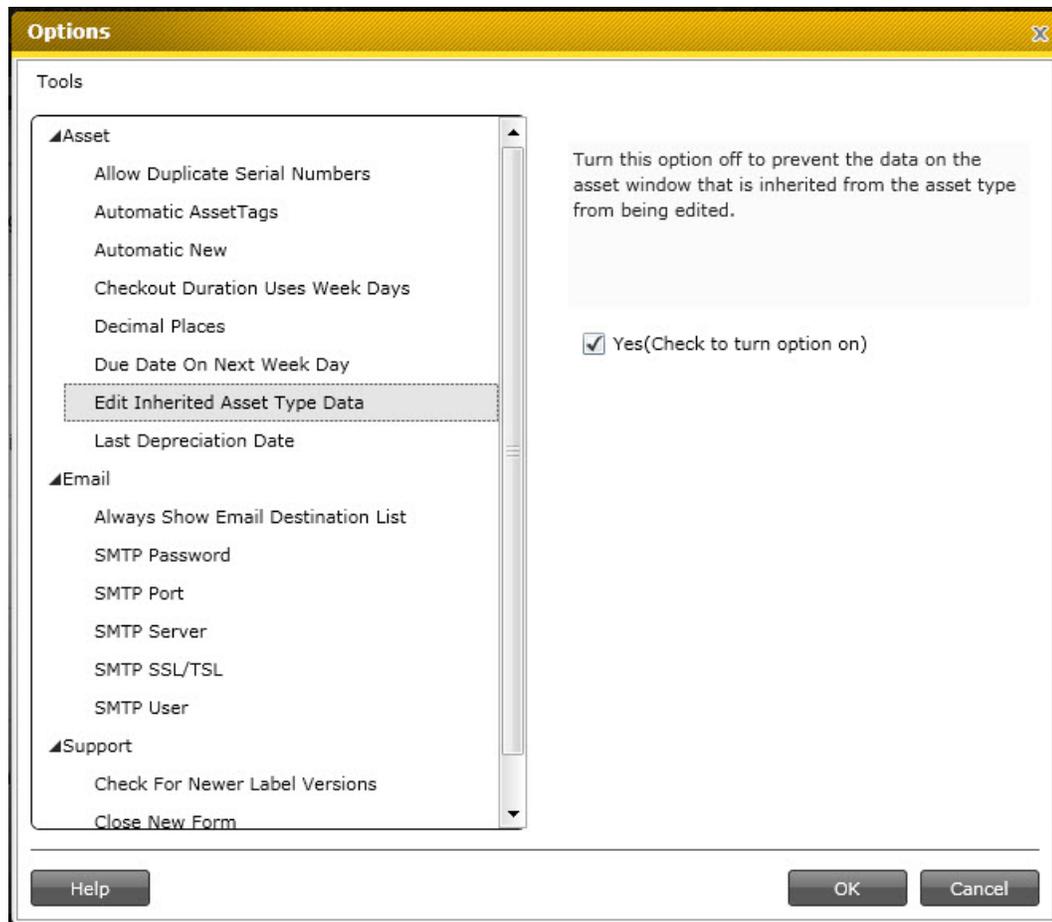
This option allows you to edit the **Asset Type** information on the **New Asset/Edit Asset - General Tab**. When you create a new **Asset** and select an **Asset Type**, you will be asked if you want to incorporate data from that **Asset Type** (manufacturer, check out length, lead time, etc.).

For more information on incorporating data from the Asset Type into a new Asset, please refer to the topic [Creating a New Asset](#).

This option is enabled by default.

### To Disable the Edit Inherited Asset Type Data Option:

1. From the **Main** screen select **Administration > Options**. The **Options** screen appears.
2. On the **Options** screen, highlight the **Edit Inherited Asset Type Data** option.



3. Deselect the **Yes** checkbox.
4. Click the **OK** button when you are done making changes.

## Email Options

The **Email** options allow you to configure MobileAsset for sending emails. Emailing is available on the [New/Edit Reservation Screen](#).

These options are accessed from **Main Page > Administration > Options**.

The following topics are covered in this section:

[Always Show Email Destination List](#)

[SMTP Password](#)

[SMTP Port](#)

[SMTP Server](#)

[SMTP SSL/TSL](#)

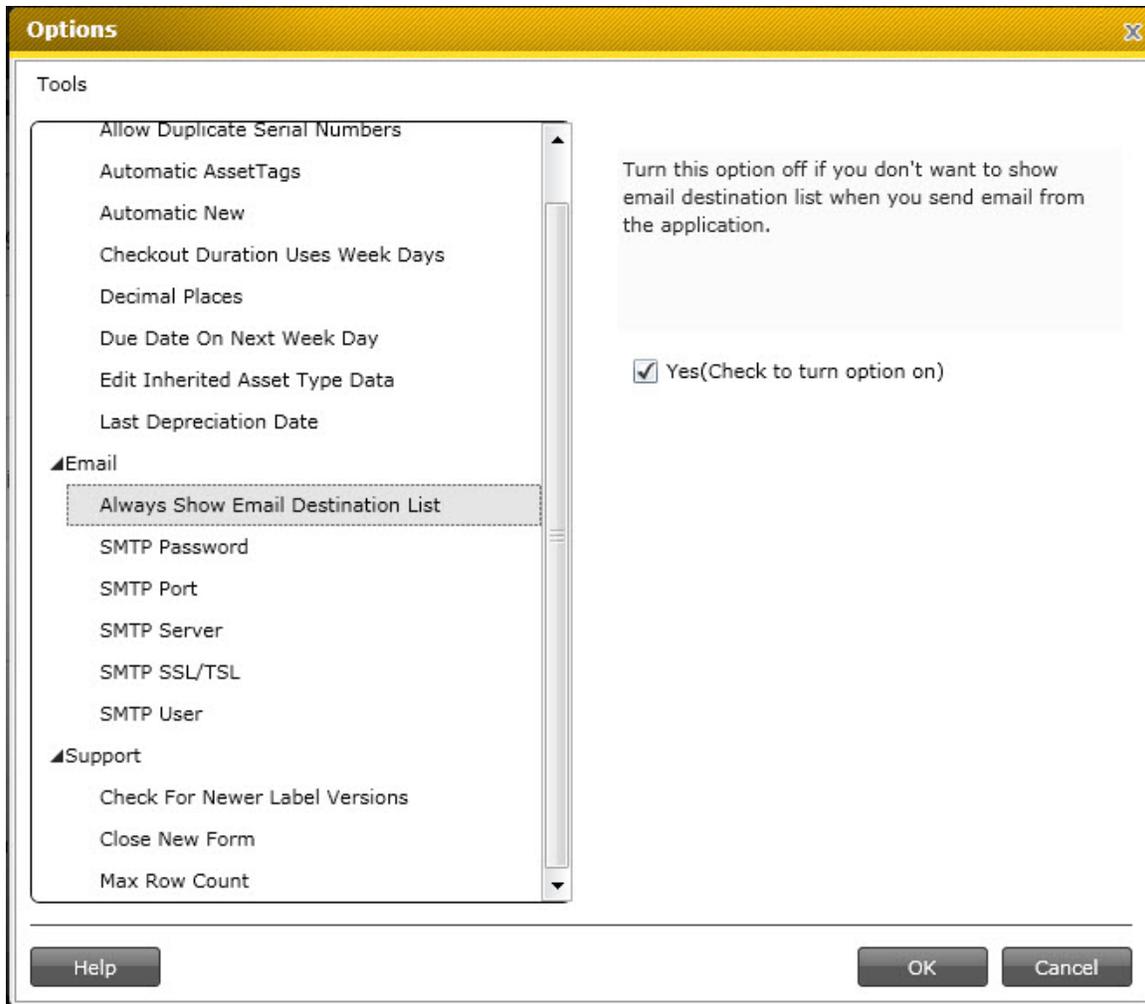
[SMTP User](#)

---

### Always Show Email Destination List:

Select **Yes** to always have the list of email destinations appear when you select the **Email** checkbox on the **New/Edit Reservation Screen**. This list allows you to select the email addresses to which the order will be sent.

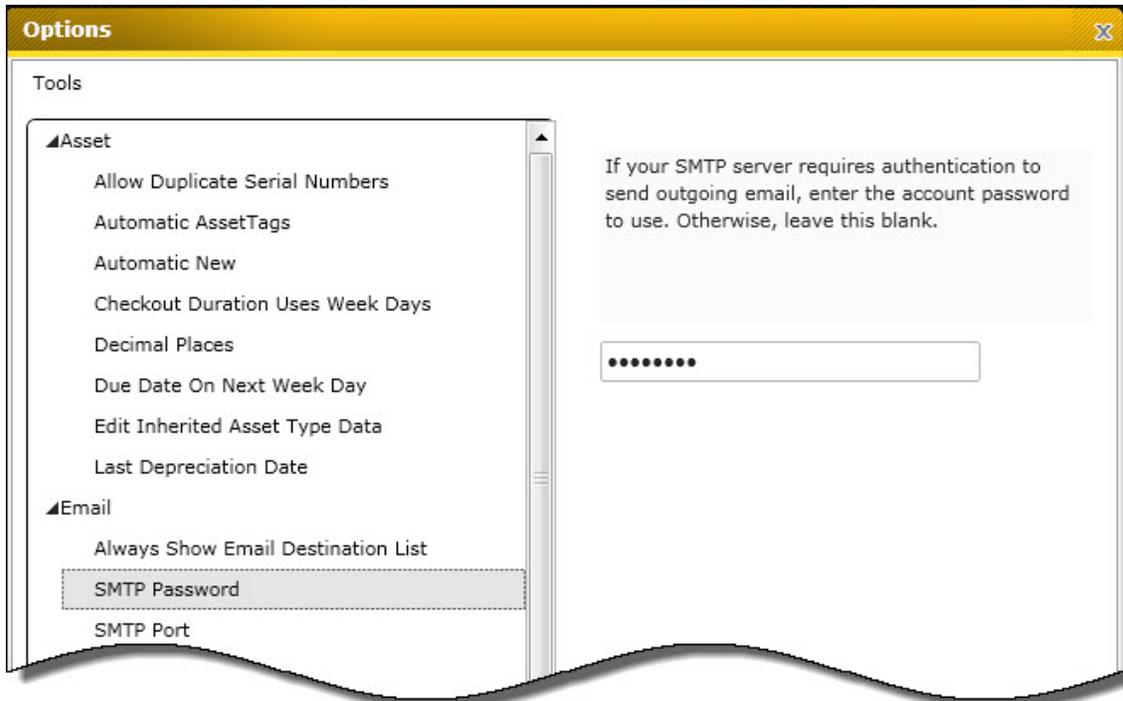
If you deselect the **Yes** checkbox, the list will not appear and the emails will automatically be sent to every address on the list.



---

**SMTP Password:**

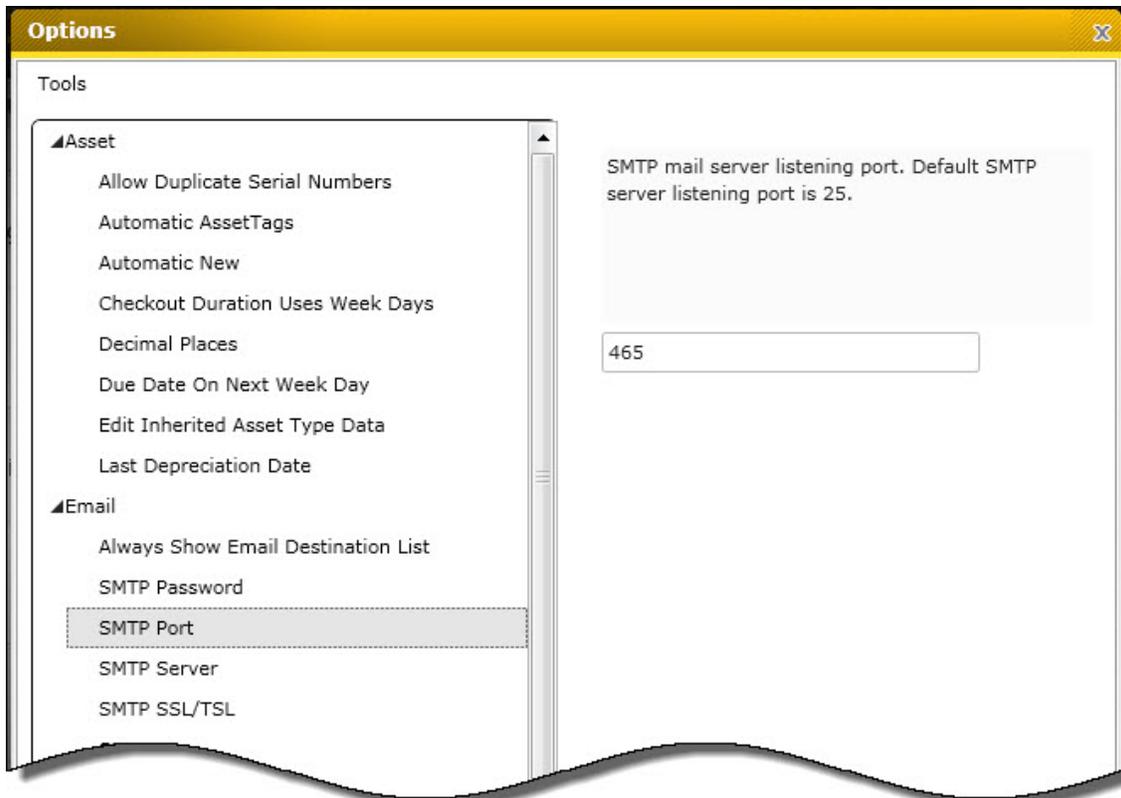
If your SMTP server requires authentication to send outgoing mail, enter the password here. If it does not require authentication, leave this field blank.



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**SMTP Port:**

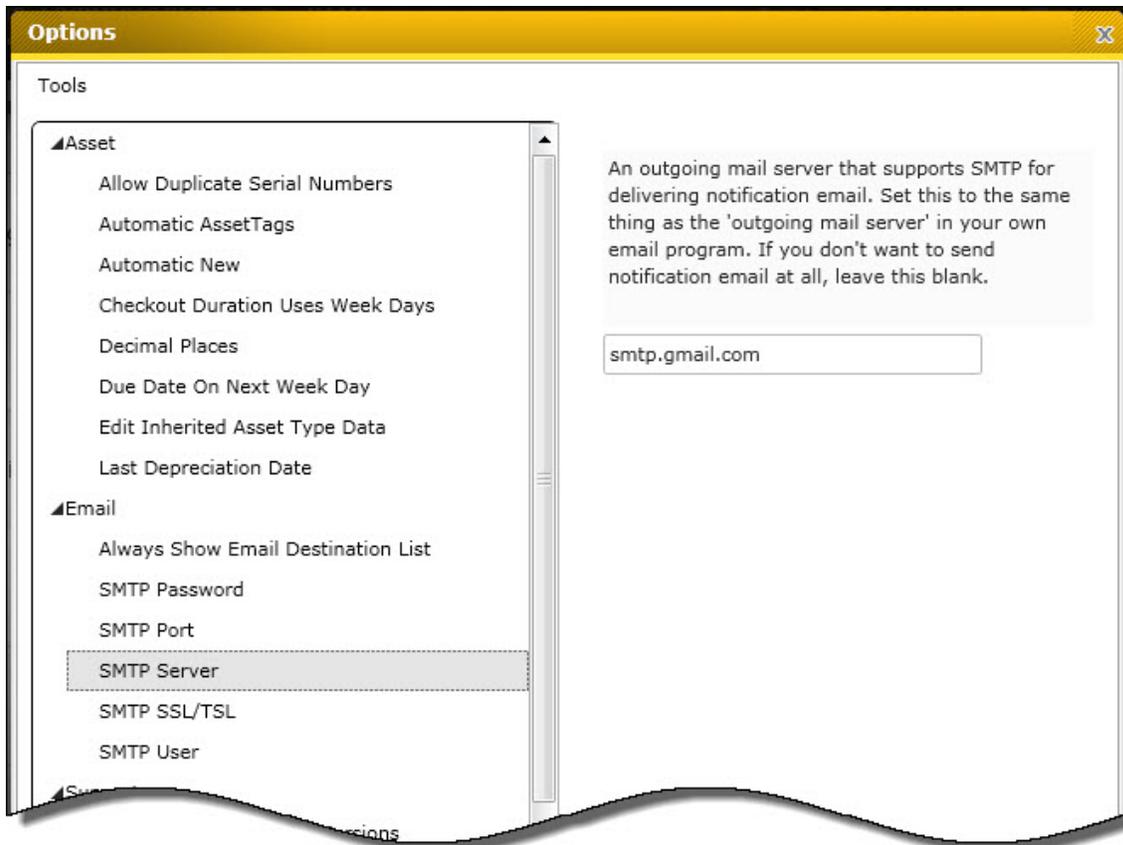
Enter the SMTP mail server listening port here. The default port is 25.



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**SMTP Server:**

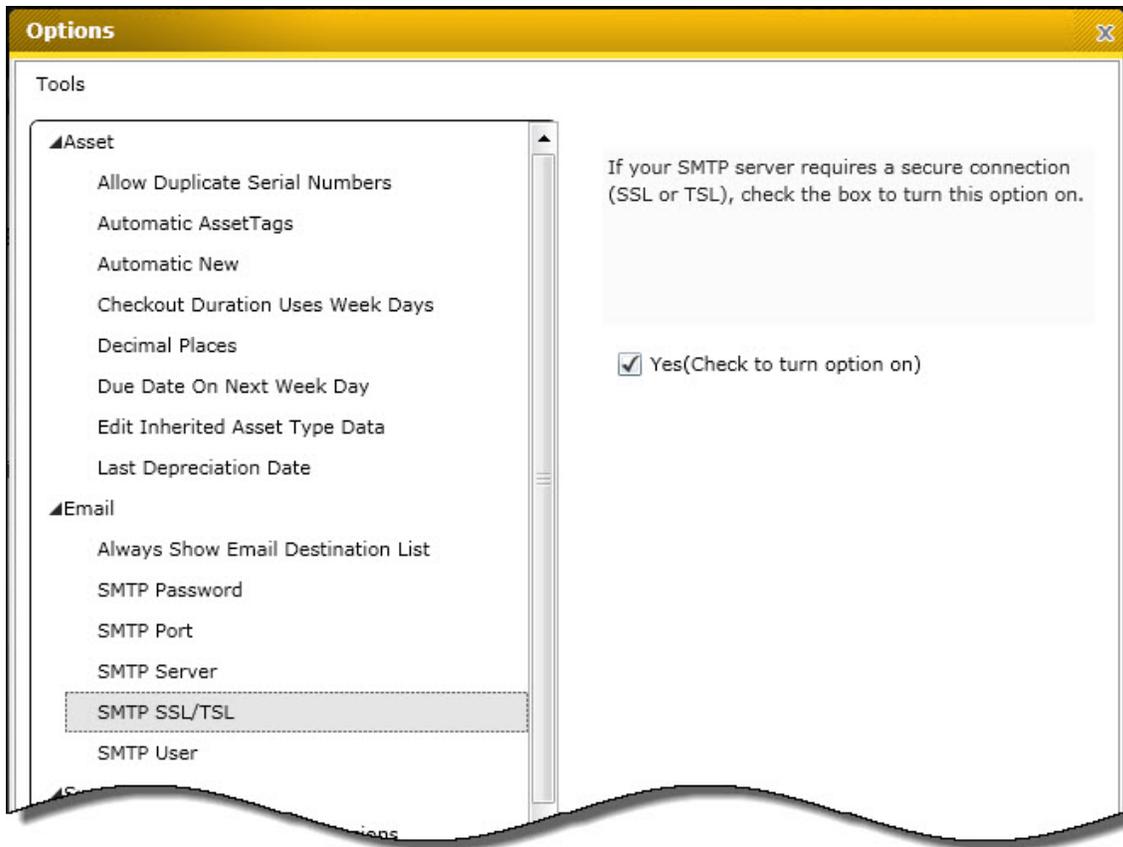
Enter the name of an outgoing mail server that supports SMTP for delivering notification emails.  
Enter the name of the same outgoing mail server that is setup in your own email program. If you do not want MobileAsset to send notification emails, leave this field blank.



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**SMTP SSL/TSL:**

Turn this option on for all SMTP servers that require SSL or TSL, including GMail SMTP servers.



### Note for GMail Users:

To use a GMail SMTP server to send out mail from MobileAsset:

1. Go to [www.gmail.com](http://www.gmail.com) and setup your gmail account.
2. Have your IT department open port 587 and 465 on your computer.
3. Turn on the SMTP SSL/TSL option, and set up the other SMTP related options on the Options screen.

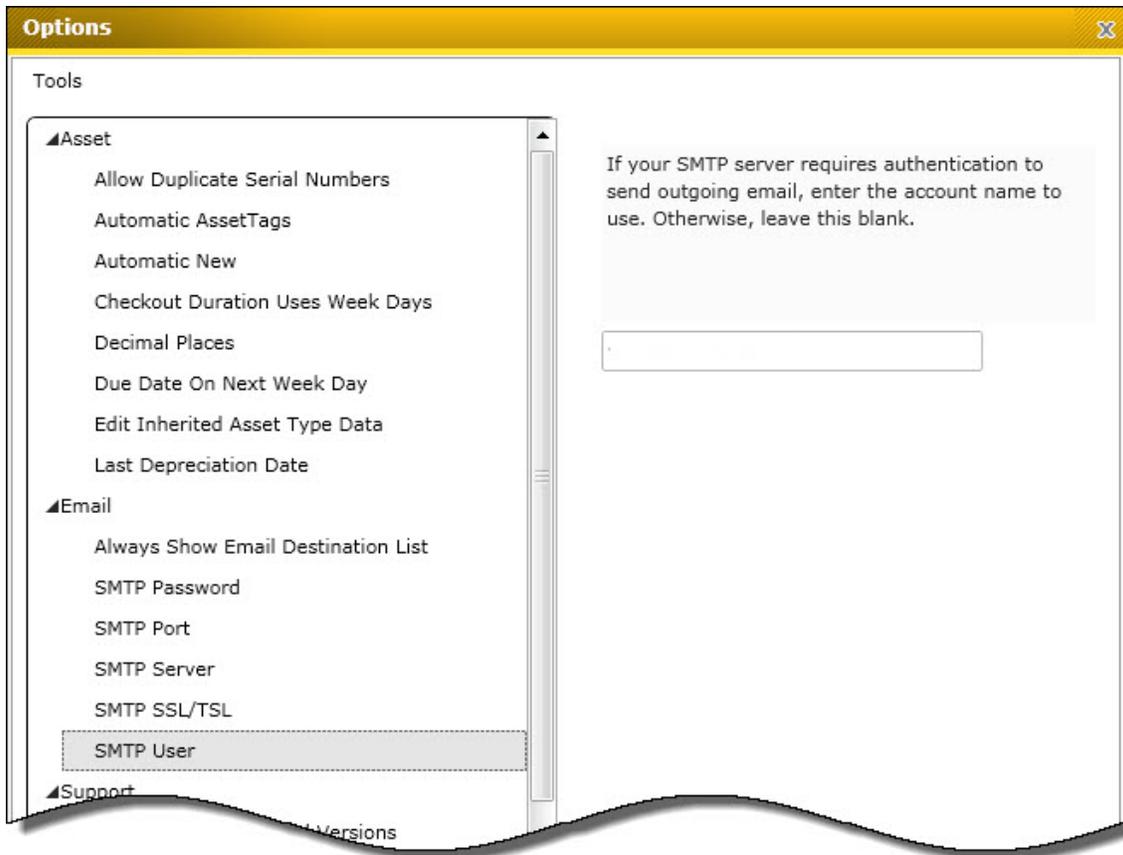
The GMail SMTP server address is `smtp.gmail.com`. The SMTP user should be `'yourgmailname@gmail.com'` (don't forget `@gmail.com`). The SMTP Password is your Gmail account password.

**Please be aware that you need to turn this option on for all SMTP servers that require SSL or TSL, not just for GMail SMTP servers.**

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### SMTP User:

If your SMTP server requires authentication to send outgoing mail, enter the user name here. If it does not require authentication, leave this field blank.



## Last Depreciation Date

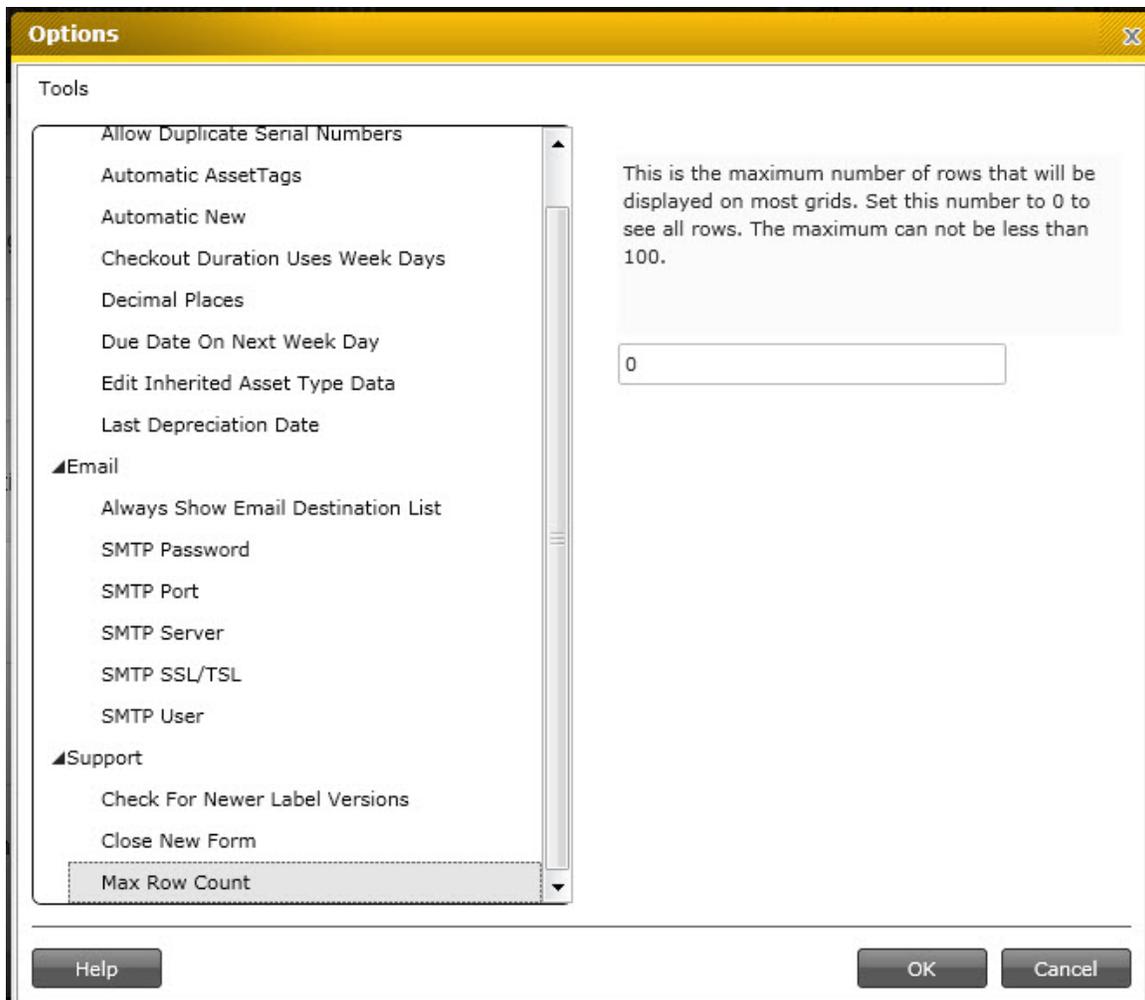
This view only field on the **Options** screen allows you to view the last date depreciation was calculated on your assets. Keep in mind that though you can enter a new date in this field, it will not affect the actual last depreciation date. **This field is view only.**

The screenshot shows a dialog box titled "Options" with a yellow header bar. The main area is divided into two sections. On the left is a tree view under the heading "Tools". The tree view has three main categories: "Asset", "Email", and "Support". Under "Asset", the following options are listed: "Allow Duplicate Serial Numbers", "Automatic AssetTags", "Automatic New", "Checkout Duration Uses Week Days", "Decimal Places", "Due Date On Next Week Day", "Edit Inherited Asset Type Data", and "Last Depreciation Date". The "Last Depreciation Date" option is highlighted with a dashed border. Under "Email", the options are: "Always Show Email Destination List", "SMTP Password", "SMTP Port", "SMTP Server", "SMTP SSL/TSL", and "SMTP User". Under "Support", the options are: "Check For Newer Label Versions" and "Close New Form". On the right side of the dialog, there is a text box containing the text "This is the last date used to calculate asset depreciation." Below this text box is a date input field containing the text "7/30/2010" and a small calendar icon to its right. At the bottom of the dialog, there are three buttons: "Help" on the left, "OK" in the center, and "Cancel" on the right.

## Max Row Count

By default MobileAsset displays all records on a List screen. You can change this default number to be lower on the **Options** screen. For example, if you have many records (over 1,000), you can set this number to display fewer rows at one time to improve system performance. It will take your system longer to retrieve and display 5,000 asset records on the **Asset List** screen then to display 1,000. Therefore, you may want to set the maximum to display 1,000

1. To change the default number of rows that display, from the **Main Menu**, select **Administration > Options**. The **Options** screen appears.
2. On the **Options** screen, select **Max Row Count**. The default number is 0, which displays all rows. You can change this to any number between 100 and 1,000. Or, you can enter 0 to display all rows on the **List** screen.



# Working with Lists

## Working with Lists

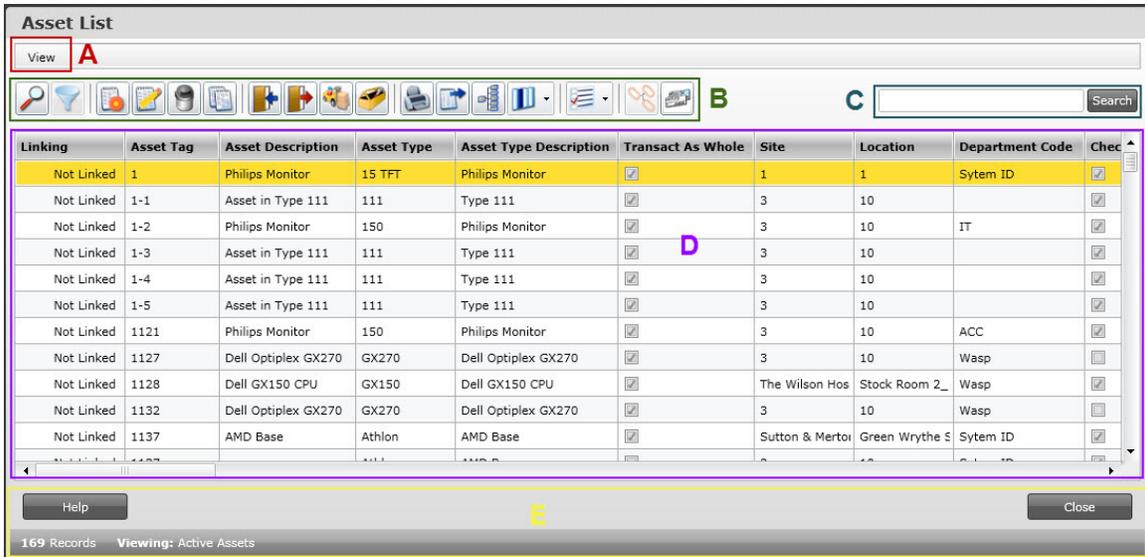
This application contains several list screens that enable you to quickly view and access a variety of information. Available list screens are:

- Assets
- Asset Types
- Contracts
- Customers
- Departments
- Depreciation Classes
- Employees
- Locations
- Manage Approvals
- Manufacturers
- Sites
- Transactions
- Vendors

Below is an example of the basic list screen layout. This is an example of the **Asset List**, the list screen you will probably use most often. This list screens are divided into three sections (labeled A through C in the example below):

- A. Menu Bar**
- B. Toolbar**
- C. Search Field**
- D. Contents List**
- E. Buttons/Status Bar**

In addition to these menus there are also "**Context-Sensitive Menus**" that appear when you right-click on certain areas of the screen. These provide another way to access many of the functions available in the toolbar. These types of menus are also discussed later in this section.



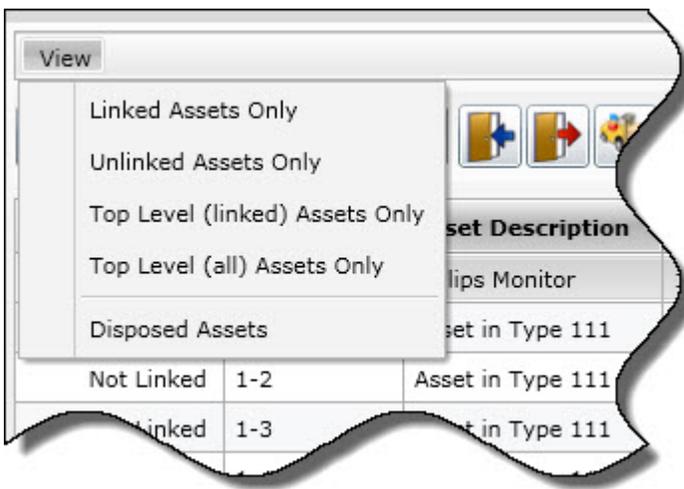
**Quick Links:**

Click a link below to jump to that section of the topic:

- [Section A: Menu Bar](#)
- [Section B: Toolbar](#)
- [Section C: Search Field](#)
- [Section D: Contents List](#)
- [Section E: Buttons/Status Bar](#)
- ["Context-Sensitive Menus"](#)

**Section A: Menu Bar (Asset List Only)**

The menu bar appears at the top of the screen and provides access to two menus:



**View (Asset List Only)** - The View menu option allows you to filter what assets display in the list. Options are:

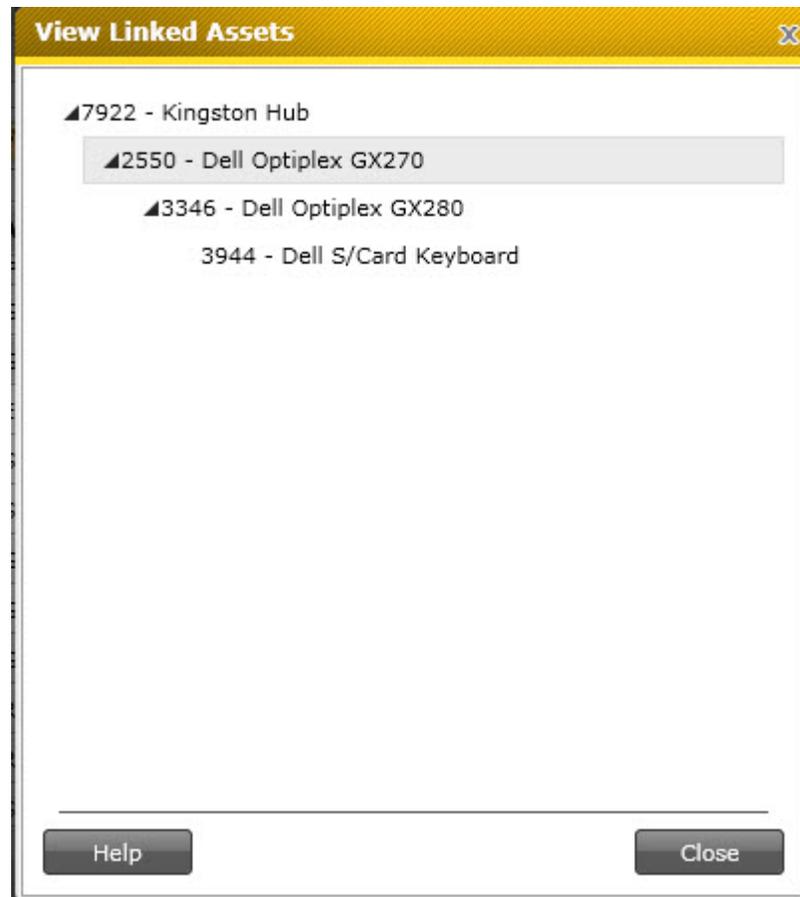
- **Linked Assets Only** - Displays only Linked assets
- **Unlinked Assets Only** - Displays only assets that are not linked to other assets.
- **Top Level (linked) Assets Only** - Displays only "Parent" assets, not the assets associated with them.
- **Top Level (all) Assets Only** - Displays all assets.
- **Disposed Assets** - Displays all assets that have been marked as Disposed.

**Section B: Tool Bar**



The toolbar at the top of the list screen provides quick access to a variety of functions and also allows you to customize how the information on the list is displayed. Keep in mind that if the >> icon appears in the toolbar of your list, there are hidden icons.

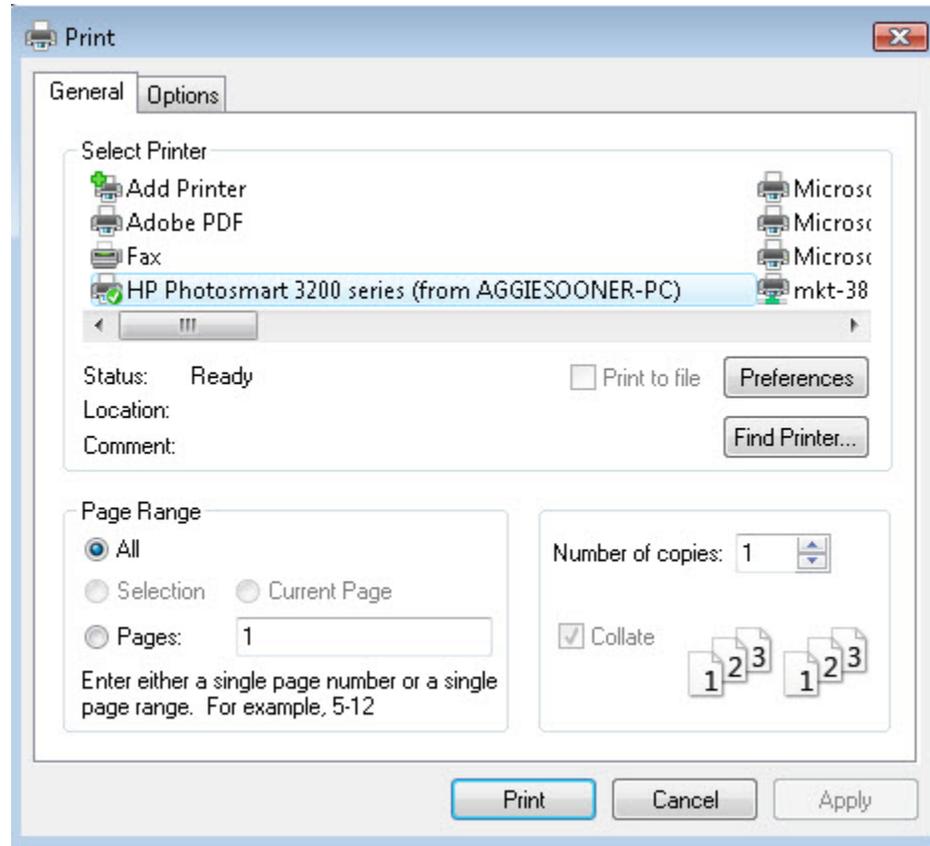
Button	Description
	<b>Filter</b> - Accesses the <b>Find</b> screen allowing you to quickly enter information to narrow your search. <b>For more information on the Find screen, please see the Simple Find help topic.</b>
	<b>Toggle Filter</b> - Once you have entered a <i>filter(specific search criteria entered on the Find screen to narrow the search results)</i> on the <b>Find</b> screen, the list results will be limited to the information you entered. For example, if on the <b>Find</b> screen you designated that you want to view only items with <i>Asset Tag 243</i> , only the item with <i>Asset Tag 243</i> will appear in your list. You can click on the <b>Toggle Filter</b> button to revert back to seeing all of the list items. Click it again to reapply your filter.
	<b>New</b> - Accesses the <b>New</b> screen allowing you to enter a new Asset, Asset Type, etc.
	<b>Edit</b> - Assesses the <b>Edit</b> screen allowing you to update and change information.
	<b>Dispose or Delete</b> - This icon is called <b>Dispose</b> on the Asset List. It allows you to <b>Dispose</b> of the selected item in the list. <a href="#">For more information on the Dispose transaction, please see the Dispose help topic.</a>  This icon is called <b>Delete</b> on other lists. It allows you to delete selected items in the lists.
	<b>Duplicate</b> - Allows you to copy the information from the item selected in the list to a new item.
	<b>Check In-</b> Accesses the Check In screen allowing you to check in an asset. <a href="#">For more information on the Check In feature, please see the Check-In help topic.</a>
	<b>Check Out</b> - Accesses the Check Out screen allowing you to check out an asset to an employee or customer. <a href="#">For more information on the Check Out feature, please see the Check-Out help topic.</a>
	<b>Move</b> - Accesses the <b>Move</b> screen allowing you to move one or more assets from one location to another. <a href="#">For more information on the Move feature, please see the Move help topic.</a>
	<b>View Linked Assets</b> - If you are using asset linking, highlight a listing, then click the <b>View Links</b> button to view the parent asset and any children. Below is an example of the <b>View Linked Assets</b> screen.



Notice that in this example the asset that was highlighted in the Asset List appears highlighted on the View Links screen (asset 2550 in this example). The parent asset appears at the top. This asset 2550 has children linked to it, so those also appear on this screen.



**Print** - Allows you to print the list. The standard Windows print screen appears.



**Export** - Allows you to export the entire asset list to a comma-delimited text file.

**What is a comma-delimited file?** This is a type of data format in which each piece of data is separated by a comma. This is a popular format for transferring data from one application to another, because most database systems are able to import and export comma-delimited data.

For example, data pulled from a database and represented in comma-delimited format looks something like the following. Each column value is separated by a comma from the next column's value and each row starts a new line:

*Adams, Jane, 46, female, New York  
Doe, John, 32, male, California  
Jones, Sam, 13, male, Texas  
Smith, Mary, 64, female, Louisiana*

When data is represented in comma-delimited format they also are referred to as comma-separated values, abbreviated CSV.

When the **Export** button is selected, a screen appears allowing you to specify where the exported data will be saved on your computer. Make sure you save this to a location you can remember.

You must also choose a name for your file on this screen. After you have made your selections, click **Save** to export your data.

A confirmation message will appear when your data has been successfully exported by the system.



**Display/Hide Group Selections** - The list screens provide you with the capability of "grouping" the displayed information so you can view data in a way that is most easy-to-read for you. You can have one group, two groups, or many groups depending on how you want to view your information. For instance, if you want all assets on the Asset List to be displayed grouped by location, you can quickly set this up.

To see the grouping options, click the **Display/Hide Group Selections** button. The top of the list screen expands to display the group selections as shown below:

Linking	Asset Tag	Asset Description	Asset Type	Asset Type Description	Transact As Whole	Site	Location	Department Code	Check
Not Linked	2532	Dell Optiplex GX270	GX270	Dell Optiplex GX270	<input checked="" type="checkbox"/>	The Wilson Hos	Helpdesk 1_	Sytem ID	<input type="checkbox"/>
Not Linked	2542	Dell Optiplex GX270	GX270	Dell Optiplex GX270	<input checked="" type="checkbox"/>	1	1	Wasp	<input checked="" type="checkbox"/>
Linked Both	2550	Dell Optiplex GX270	GX270	Dell Optiplex GX270	<input checked="" type="checkbox"/>	1	1	Sytem ID	<input checked="" type="checkbox"/>
Not Linked	3	Toshiba e570 Handhe	E570	Toshiba e570 Handheld	<input checked="" type="checkbox"/>	The Wilson Hos	Portakabin 1_	Wasp	<input type="checkbox"/>
Not Linked	3055	Dell S/Card Keyboard	SK-3106	Dell S/Card Keyboard	<input checked="" type="checkbox"/>	Sutton & Merto	Cannon Hill Lan	Sytem ID	<input checked="" type="checkbox"/>

### Creating Groups

1. To create a new group, click on a column header, then drag it to the space indicated on the screen. For example, if you want to group information by Site, click on the Site column header and drag it to the indicated space.

Linking	Asset Tag	Asset Description	Asset Type	Asset Type Description	Transact As Whole	Site	Location
Not Linked	1	Philips Monitor	15 TFT	Philips Monitor	<input checked="" type="checkbox"/>	1	1
Not Linked	1-1	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	1	1

2. The screen now lists Site as one of your groups and the assets are grouped according to what Site they are assigned.

Grouped by: **Site**

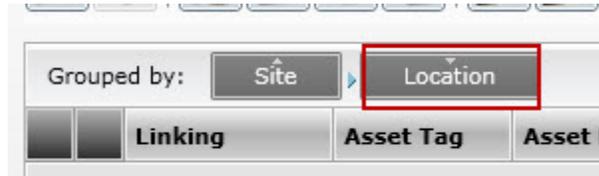
Linking	Asset Tag	Asset Description	Asset Type	Asset Type Description	Transact As Whole	Site	Loc
^ 1							
Not Linked	1	Philips Monitor	15 TFT	Philips Monitor	<input checked="" type="checkbox"/>	1	1
Not Linked	1-1	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	1	1
Not Linked	1-3	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	1	1
Not Linked	1-4	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	1	1

3. You can create additional groups to further organize your information by continuing to drag and drop column headers. For example, you can create a second group for Locations within Sites by dragging the Location column header to the top of the screen.

Now the Asset List groups information by Site, and then by Location.

Linking	Asset Tag	Asset Description	Asset Type	Asset Type Description	Transact As Whole	Site	Location
Not Linked	1	Philips Monitor	15 TFT	Philips Monitor	<input checked="" type="checkbox"/>	1	1
Not Linked	1-1	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	1	1
Not Linked	1-3	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	1	1

- By default, the groups list information in ascending order (Site 001, Site 002, etc.). You can change this to descending order by clicking on the group name. Notice that after you click on the group name, the arrow next to the name is now pointing in the opposite direction and the information on the screen is reorganized.



**Deleting Groups**

- If you no longer want to display information in a particular group you can easily ungroup the data. For instance, if you have created a group for Site and another for Location, but now wish to only group by site, you can delete location from the Grouped by list. Hover your mouse over the group you want to delete. A checkbox appears:

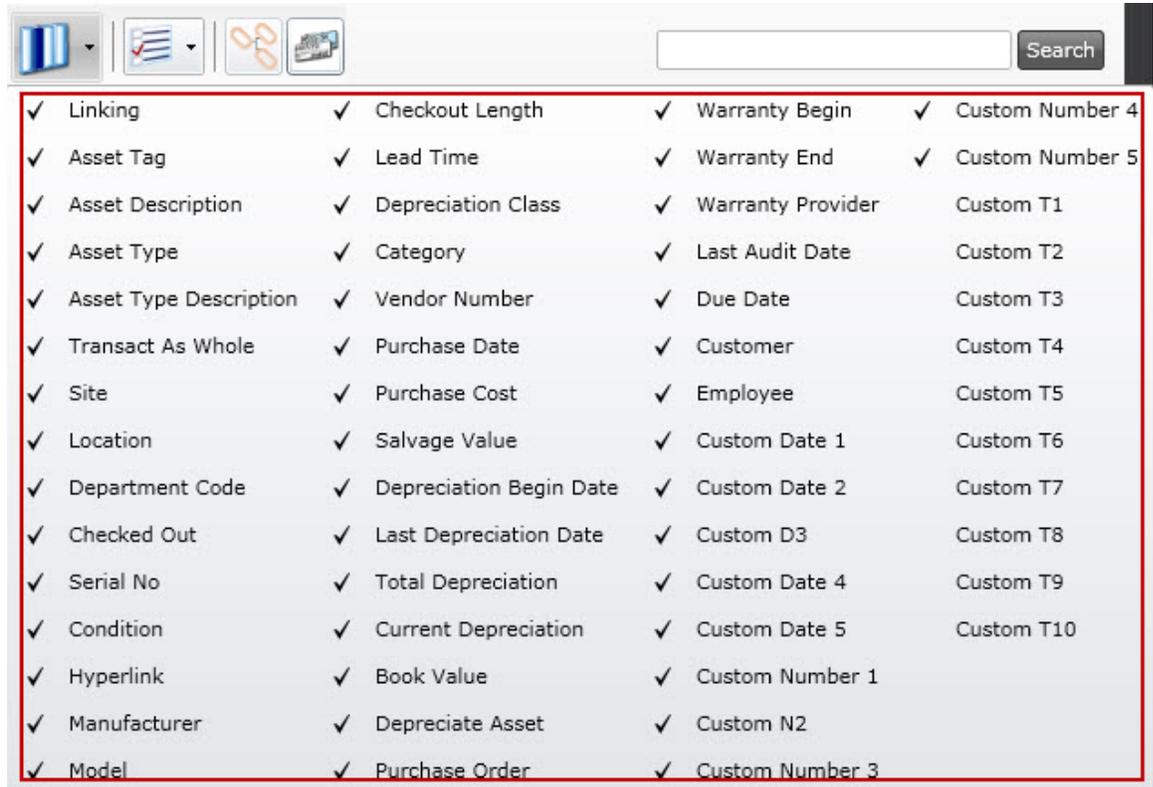


- Click the checkbox to delete the group. The information contained in that group still appears on the display screen, but it is no longer grouped together.

Linking	Asset Tag	Asset Description	Asset Type	Asset Type Description	Transact As Whole	Site	Location	Departure
Not Linked	1	Philips Monitor	15 TFT	Philips Monitor	<input checked="" type="checkbox"/>	1	1	System
Not Linked	1-1	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	1	1	
Not Linked	1-3	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	1	1	
Not Linked	1-4	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	1	1	
Not Linked	1-5	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	1	1	



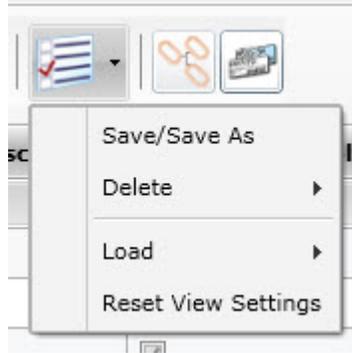
**Show/Hide Columns** - The list allows you to hide columns by clicking the **Show/Hide Columns** icon and selecting which columns you want to see. This enables you to hide information you do not usually need. Click on the Show/Hide Columns icon to see a list of all columns. Those with check marks in front of them are currently displayed in your list. To hide a column, click on a column name. The check mark will disappear, meaning that column will not appear in your list.



Notice in this example the Custom T1 through T10 columns are hidden (no check mark).

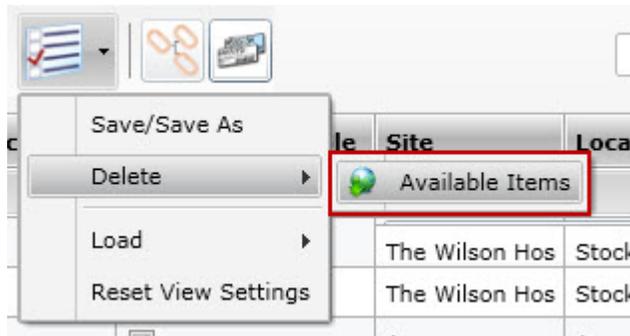
When you hide a column, it will remain hidden until you manually return it to the List screen by following the instructions above.

	<p><b>Print Tags/Labels/Badges</b> - This button is available on the Asset, Employee, Location Lists only. This option allows you to print barcode labels for any assets, employees, etc. selected in the list.</p> <p><b>Note:</b> You must select a Label Printer in the MobileAsset PC application prior to printing tags from the List screens.</p> <p><b>To Print Tags/Labels:</b></p> <ol style="list-style-type: none"> <li>1. Click the <b>Print Tags</b> button on the toolbar. An example of your tag/label/badge appears.</li> <li>2. Click the <b>Print</b> button to print.</li> </ol>
	<p><b>Views</b> - This icon allows you to save your list settings, including any filters (search criteria), group settings, reordered columns, etc. Click on the icon arrow to view available options for this feature, as shown below:</p>

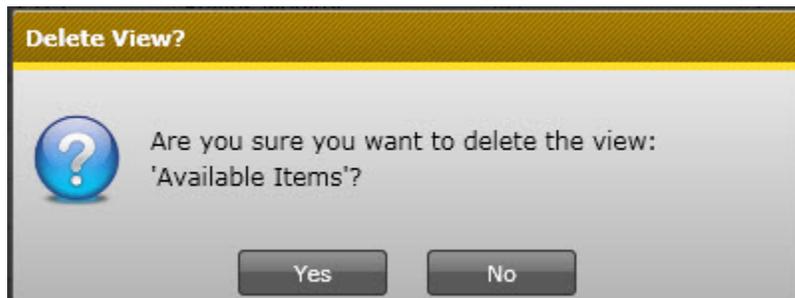


Options are:

- **Save/Save as** - Accesses the [Save View](#) screen allowing you to name and save list settings.
- **Delete** - Click the arrow to view a list of views that can be deleted. To delete:
  - a. Select **Views > Delete**. A list of all saved views appears.
  - b. Click on the filter you want to delete.



- c. A confirmation message similar to the one below appears:



Click **Yes** on the confirmation message.

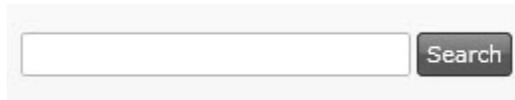
- **Load** -This option allows you to apply a saved view to the list.  
To load a saved filter:
  - a. Select **Views > Load**. A list of all saved views appears.

b. Click on the view you want to apply:



c. The selected view will be applied to your list.

### Section C: Search Field



Enter a keyword or number in this field. MobileAsset Web will search all records on the list and display only those containing all or part of the entered text.

### Section D: Contents List

Linking	Asset Tag	Asset Description	Asset Type	Asset Type Descri	Transact As Whole	Site	Location	Department C
Not Linked	1005	17" Monitor	Monitor 17"	17" Monitor	<input checked="" type="checkbox"/>	Main Office	Storage Rm A	1203
Not Linked	4000	T61 units	Laptop IBMThinkPac	T61 units	<input checked="" type="checkbox"/>	Main Office	Storage Rm A	1203
Not Linked	4001	T61 units	Laptop IBMThinkPac	T61 units	<input checked="" type="checkbox"/>	Main Office	Storage Rm A	1203
Not Linked	4002	T61 units	Laptop IBMThinkPac	T61 units	<input checked="" type="checkbox"/>	Main Office	sales office 1	1203
Not Linked	4003	T61 units	Laptop IBMThinkPac	T61 units	<input checked="" type="checkbox"/>	Main Office	Storage Rm A	1203
Not Linked	4005	video card device	Video Card	video card device	<input checked="" type="checkbox"/>	Main Office	Storage Rm A	1203
Not Linked	4007	ID software suite	Software Macromed	ID software suite	<input checked="" type="checkbox"/>	Main Office	Storage Rm A	1203
Not Linked	4008	ID software suite	Software Macromed	ID software suite	<input checked="" type="checkbox"/>	Main Office	Storage Rm A	1203
Not Linked	4010	d17 laptop	Laptop Dell	d17 laptop	<input checked="" type="checkbox"/>	Main Office	Storage Rm 17	1203
Not Linked	4011	d17 laptop	Laptop Dell	d17 laptop	<input checked="" type="checkbox"/>	Main Office	Storage Rm 17	1203
Not Linked	4012	d17 laptop	Laptop Dell	d17 laptop	<input checked="" type="checkbox"/>	Main Office	training office	1203

The contents list displays all data related to the selected list. For example, if you selected the Asset List, all assets will display here, if you selected the Locations list, all locations will display here, etc.

**Sorting Columns:** Most of the columns that appear in the lists can be sorted ascending or descending. The columns sort ascending by default. To change the sort order, click on the column heading. An arrow will appear next to the column name to let you know in which direction the information is sorted. The example below shows the Site column sorted Ascending.

Site
1
1
1
1
1

**Selecting a Listing:** You can quickly scroll through the listings using the scroll bars to the right and below the contents list. Keep in mind that you can also use the **Hide/Show Columns** button to view columns that are normally hidden (see [Section B: Toolbar](#), above).

You can click on a listing to highlight it, then click the button that accesses the desired function. For example, if you want to edit Asset 1137, use your mouse to click on that item in your **Asset List**, then click the **Edit** button.

**Selecting Multiple Listings:** You can select multiple listings at a time by holding down the **Ctrl** and clicking the listings with your mouse. Multi-select can be used for **Disposing/Deleting** items and **Maintenance**.

---

## Section E: Buttons/Status Bar



This section contains the following:

**Help** - Click this button to access this help document.

**Close** - Click this button to close the list. Keep in mind when closing the list that your groups and column settings will be retained.

**Status Bar** - The bar at the bottom of the screen indicates what filters you currently have set for the list.

---

## Context-Sensitive Menus

The software provides you with a toolbar for quick access to various list features and, in addition, many of these features can also be accessed via "context-sensitive menus". By right-clicking on a column heading, a list of available features appears, as shown below:

## MobileAsset Users' Manual

Filter
New Asset
Edit Asset
Dispose
Duplicate Asset
Check In
Check Out
Move
Maintain
Print List
Export List
Group Columns
Print Tags

These features allow you to sort, group and hide columns in the list. Any changes you make to the list via this menu will be retained when the screen is closed and re-opened.

---

## Vendors List Example

The Vendor List, accessed from the **Main Menu** by selecting **List Forms > Vendors**, allows you view Vendors you have already setup and to create new or modify existing Vendors. For detailed information on working with list screens, please see [Working with Lists](#).

Below is an example of the Vendor List.

Vendor Code	Name	Email	Web Site	Contact Name	Address 1	Address 2	City
3333	Computers Direct			Sarah Peterson			
689754	PC Unlimited						
85766	Tech Services			Jennifer Dean	1400 10th St		Pla
86597	IT Services			Elizabeth Banks			

## Asset List Example

The **Asset List**, accessed from the **Main Menu** by selecting **List Forms > Assets** or **Asset Management > List Assets**, allows you view Assets you have already setup and to create new or modify existing assets. For detailed information on working with list screens, please see [Working with Lists](#). Below is an example of the **Asset List**.

**Asset List**

View

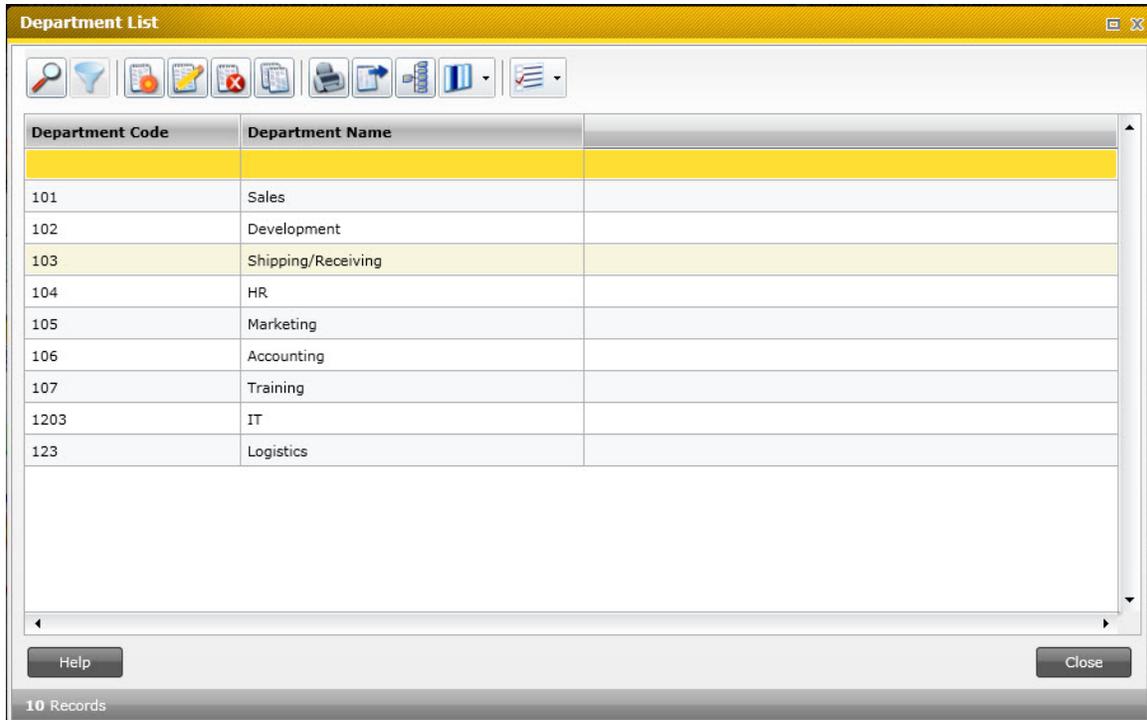
Linking	Asset Tag	Asset Description	Asset Type	Asset Type Description	Transact As Whole	Site	Location	Department Code	Check
Not Linked	1	Philips Monitor	15 TFT	Philips Monitor	<input checked="" type="checkbox"/>	1	1	Sytem ID	<input checked="" type="checkbox"/>
Not Linked	1-1	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	3	10		<input checked="" type="checkbox"/>
Not Linked	1-2	Philips Monitor	150	Philips Monitor	<input checked="" type="checkbox"/>	3	10	IT	<input checked="" type="checkbox"/>
Not Linked	1-3	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	3	10		<input checked="" type="checkbox"/>
Not Linked	1-4	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	3	10		<input checked="" type="checkbox"/>
Not Linked	1-5	Asset in Type 111	111	Type 111	<input checked="" type="checkbox"/>	3	10		<input checked="" type="checkbox"/>
Not Linked	1121	Philips Monitor	150	Philips Monitor	<input checked="" type="checkbox"/>	3	10	ACC	<input checked="" type="checkbox"/>
Not Linked	1127	Dell Optiplex GX270	GX270	Dell Optiplex GX270	<input checked="" type="checkbox"/>	3	10	Wasp	<input type="checkbox"/>
Not Linked	1128	Dell GX150 CPU	GX150	Dell GX150 CPU	<input checked="" type="checkbox"/>	The Wilson Hos	Stock Room 2_	Wasp	<input checked="" type="checkbox"/>
Not Linked	1132	Dell Optiplex GX270	GX270	Dell Optiplex GX270	<input checked="" type="checkbox"/>	3	10	Wasp	<input type="checkbox"/>
Not Linked	1137	AMD Base	Athlon	AMD Base	<input checked="" type="checkbox"/>	Sutton & Merto	Green Wrythe S	Sytem ID	<input checked="" type="checkbox"/>

169 Records Viewing: Active Assets

## Departments List Example

The Department List, accessed from the **Main Menu** by selecting **List Forms > Departments**, allows you view Departments you have already setup and to create new or modify existing departments. For detailed information on working with list screens, please see [Working with Lists](#).

Below is an example of the Department List.



Department Code	Department Name
101	Sales
102	Development
103	Shipping/Receiving
104	HR
105	Marketing
106	Accounting
107	Training
1203	IT
123	Logistics

## Depreciation Class List Example

The Depreciation Class List, accessed from the **Main Menu** by selecting **List Forms > Depreciation Classes**, allows you view depreciation classes you have already setup and to create new or modify existing classes. For detailed information on working with list screens, please see [Working with Lists](#).

Below is an example of the **Depreciation Class List**.

Name	Depreciation Method	Custom Percentage	Asset Life Years	Asset Life Months	Fully depreciate to salvage value
150DB5	150% Declining Balance	0.00	5	0	<input checked="" type="checkbox"/>
Computer Software	Double Declining Balance	0.00	4	0	<input checked="" type="checkbox"/>
DDB4	Double Declining Balance	0.00	4	0	<input checked="" type="checkbox"/>
Furniture	Sum-of-the-years'-digit	0.00	7	0	<input checked="" type="checkbox"/>
Laptops	Straight-Line	0.00	3	0	<input checked="" type="checkbox"/>
Monitors	Straight-Line	0.00	5	0	<input checked="" type="checkbox"/>
PCSL4	Straight-Line	0.00	4	0	<input checked="" type="checkbox"/>
SL2	Straight-Line	0.00	2	0	<input checked="" type="checkbox"/>
SL6	Straight-Line	0.00	6	0	<input checked="" type="checkbox"/>
SYD4	Sum-of-the-years'-digit	0.00	4	0	<input checked="" type="checkbox"/>

10 Records

## Customer List Example

The Customer List, accessed from the **Main Menu** by selecting **List Forms > Customers**, allows you view customers you have already setup and to create new or modify existing customers. For detailed information on working with list screens, please see [Working with Lists](#).

Below is an example of the Customer List.

Customer No.	Name	Company Name	Email	Department	Date Added	Address 1	Address 2	City	State	Postal Code
1	Eric Fowler	First Bank	efowler@firstbank.i	Sales	12/1/2007					
2	Jeremy Knight	City College	jknight@college.ei	Inventory	12/1/2007					
3	Kathy Howard	InfoTronics	khow@info.com	Sales	12/1/2007					
4	Deborah Smith	InnerSpec	dsmith@inspec.con	Procurement	12/1/2007					
5	Brian Jackson	TestData Inc	brian.jackson@td.c	Inventory	12/1/2007					
6	John Vinson	Family Groceries	jv@family.com	Sales	12/1/2007					
7	Grace Whatley	Adams, Pruitt, & Ar	gw@apacount.com	Procurement	12/1/2007					
8	Evan Danielson	Main Engineering	edanielson@main.c	Procurement	12/1/2007					
9	Sarah Feldman	Design Central	sara@design.com	Inventory	12/1/2007					

9 Records

## Contracts/Licenses List Example

The **Contracts List**, accessed from the **Main Menu** by selecting **List Forms > Contracts/Licenses**, allows you view contracts or licenses you have already setup and to create new or modify existing contracts/licenses. For detailed information on working with list screens, please see [Working with Lists](#).

Below is an example of the **Contracts List**.

Contract Number	Description	Internal Contact	Begin Date	End Date	Licenses	No End Date	Asset Count	Software	Cost	Hyperlink
051503	Macromedia Suite soft	Liz Banks	12/1/2008		5	<input checked="" type="checkbox"/>	2	<input checked="" type="checkbox"/>	0.00	
402900	PC repair/service	Liz Banks	12/1/2008	12/1/2010	1	<input type="checkbox"/>	22	<input type="checkbox"/>	0.00	

## Asset Type List Example

The **Asset Type List**, accessed from the **Main Menu** by selecting **List Forms > Asset Types**, allows you to view Asset Types you have already setup and to create new or modify existing asset types. Asset Types are a category for assets. Assets are assigned to a specific asset type. For instance, you may have an Asset Type of Label Printers that defines the manufacturer, size specs, etc. of this particular type of printer. Then specific printers of the same type are assigned to the Label Printers asset type.

For detailed information on working with list screens, please see [Working with Lists](#).

Below is an example of the **Asset Type List**.

Asset Type	Description	Checkout Length	Manufacturer	Model	Vendor Number	Depreciation Class	Category
10/100 8 prt	Buffalo Switch	5 days 0 hrs 0 min	Palm	10/100 8 pr	1	Handheld	Hardware
1016DT	SMC Switch	8 days 0 hrs 0 min	Palm	1016DT	2	Handheld	Hardware
1024DT	SMC Switch	11 days 0 hrs 0 min	Palm	1024DT		Handheld	
111	Type 111	0 days 1 hrs 0 min	Brother	P Touch		Printer	Hardware
112	112 on wdt3200	8 days 0 hrs 0 min	3	model wdt3	180	180	cat wdt3200
113	113 wdt	9 days 0 hrs 0 min	mf 3200	model 3200	3200	2	cat 3200
114	114	2 days 0 hrs 0 min	4	4	8	str	3200
115	115	0 days 0 hrs 0 min					
13	13	8 days 0 hrs 0 min	13	13 Model	13	double 5	13 cat
1320	HP Lower Tray	10 days 0 hrs 0 min	Hewlett Packard	1320	1	Handheld	Hardware
15 TFT	Philips Monitor	6 days 0 hrs 0 min	Toshiba	15 TFT	2	Monitor	Hardware
150	Philips Monitor	10 days 0 hrs 0 min	Toshiba	150	1	Monitor	1200
150B2	Philips Monitor	11 days 0 hrs 0 min	Toshiba	150B2		none	new CAT USE
150S	Philips Monitor	11 days 0 hrs 0 min	Toshiba	150S		Monitor	
155	155	5 days 0 hrs 0 min	Fujitsu	M 155	5	Mobile Device	Hardware

196 Records

## Locations List Example

The Location List, accessed from the **Main Menu** by selecting **List Forms > Locations** allows you view Locations you have already setup and to create new or modify existing locations. For detailed information on working with list screens, please see [Working with Lists](#).

Below is an example of the Location List.

Site	Location	Description	Custom Date 1	Custom Date 2	Custom Date 3	Custom Date 4	Custom Date 5	Custom Date 6
001	Administrative Of							
001	NE Warehouse							
001	Plano Warehouse							
001	SW Warehouse							

## Manufacturer List Example

The Manufacturer List, accessed from the **Main Menu** by selecting **List Forms > Manufacturers** allows you view Manufacturers you have already setup and to create new or modify existing manufacturers. For detailed information on working with list screens, please see [Working with Lists](#).

Below is an example of the Manufacturer List.

Name	Email	Web Site	Contact Name	Address 1	Address 2	City	State	Postal Code
Dell		http://www.del	James Bullocks	1688 E. Mfg We		Dallas	TX	75074
Dell 2	jsmith@dell.com	www.dell.com	Jim Smith	1688 E. Mfg Dr.	Suite 88	Dallas	TX	75074
Fujitsu		http://www.fuji						
Hewlett Packard		http://www.hp.						
Kyocera		http://www.kyc						
Palm	jsmith@euro.palm.	http://euro.palm	John Smith	1677 W. Palm /	Suite 77	Dallas	TX	78501
Toshiba		http://uk.comp						

11 Records

## Employee List Example

The Employee List, accessed from the **Main Menu** by selecting **List Forms > Employees**, allows you view employees you have already setup and to create new or modify existing employees.

For detailed information on working with list screens, please see [Working with Lists](#).

Below is an example of the Employee List.

Employee No	Last Name	First Name	Department	Manager No	Phone	Ext	Email	Address 1	Address 2	Mail Stop
04295153	Thomas	Dan								
05150329	Taylor	David								
123456789	Miller	Billy	1203							
379856458	McGee	Billy	123							
6458732159	Phillips	Terri								
6598742	Harris	Eric	123				eharris@work.com			
975648125	Martin	Joan								

## Site List Example

The Site List, accessed from the **Main Menu** by selecting **List Forms > Sites**, allows you view Sites you have already setup and to create new or modify existing Sites. For detailed information on working with list screens, please see [Working with Lists](#).

Below is an example of the Site List.

Site	Description	Custom Date 1	Custom Date 2	Custom Date 3	Custom Date 4	Custom Date 5	Custom Number 1
14th Street Offi							0.00
Main Office							0.00

2 Records

## Transactions List Example

The Transaction List displays all transactions completed in MobileAsset. The Transaction List is accessed from the **Main Menu** by selecting **List Forms > Transactions**. You can keep this list current by using the **Archive Transactions** function to remove old transactions from your list. For detailed information on working with list screens, please see **Working with Lists**.

Below is an example of the Transaction List:

Trans Date	Trans Type	Asset Tag	Department	Location	Other Location	Reason	Entry Date	Date Acqu
12/4/2008	Add	4000		Storage Rm A			12/4/2008	
12/4/2008	Add	4001		Storage Rm A			12/4/2008	
12/4/2008	Add	4002		Storage Rm A			12/4/2008	
12/4/2008	Add	4003		Storage Rm A			12/4/2008	
12/4/2008	Add	4005		Storage Rm A			12/4/2008	
12/4/2008	Add	1005		Storage Rm A			12/4/2008	
3/13/2009	Add	5000	1203	Storage Rm E			3/13/2009	
3/13/2009	Add	5001	1203	Storage Rm E			3/13/2009	
3/13/2009	Add	5002	1203	Storage Rm E			3/13/2009	
3/30/2009	Add	K1000		marketing office			3/30/2009	
12/8/2008	Add	4068		Storage Rm A			12/8/2008	
12/8/2008	Add	4069		Storage Rm B			12/8/2008	
12/8/2008	Add	4070		training office			12/8/2008	
2/2/2009	Add	49000		marketing office			2/2/2009	
2/2/2009	Add	490001		marketing office			2/2/2009	

78 Records

## Save View Screen

This screen, accessed from some List screens, allows you to save settings you have made on the List screen, including search criteria, grouping, column reordering, etc. For more information on the **Save Named Filters** function, please refer to the topic [Working with Lists](#).

### Using the Save View Screen:

1. After you have arranged, grouped, filtered the list as desired, select the **Views** icon from the toolbar.



2. Click on **Save/Save As**. The **Save View** screen appears:

3. Enter a name for these list settings in the **Name** field.
4. You can optionally enter a description for the filter in the **Description** field.
5. If you want this view to be the default list view, select the **Set as Default** checkbox. The list will always open with the saved settings when you open it.
6. If you want the view to be visible to everyone who accesses the List screen, select the **Visible for All Users** checkbox. This means that any users who is logged in to MobileAsset and has access to the List screens can see this view.
7. Click the **OK** button to save your settings.



## Printing Labels/Asset Tags from the List Screens

MobileAsset Web allows you to print labels and asset tags directly from the **List** screens. The following **List** screens have label printing functionality:

- **Asset List** - Print Asset Tags
- **Employee List** - Print Employee Badges
- **Location List** - Print Location Labels

**Note:** You must select a label printer in the MobileAsset PC application prior to printing tags from the **List** screens. To do this, see the topic [Selecting a Label Printer in the Mobile Asset Online Help](#).

### To Print Tags/Labels/Badges:

1. With the desired **List** screen open (**Asset**, **Employee** or **Location**), highlight the listing you want to print. You can select multiple listings by holding down the Ctrl key on your keyboard while clicking on listings.
2. Click the **Print Tags/Labels** button on the toolbar.

The following screen appears:

<SS>

3. Enter the number of labels you want to print for each selected item.
  4. Click the **OK** button.
-



# Reports

## Report Viewer

The **Report Viewer** presents reports in an interactive environment that permits keyword searches, printing and export to Adobe Acrobat® Reader™ (.pdf), Microsoft® Excel (.xls), Microsoft® Word (.doc) or Rich Text Format (.rtf) files.

The following topics are covered in this section:

[Report Viewer Overview](#)

[Navigating Reports](#)

[Troubleshooting Reports](#)

[Troubleshooting Opening Reports](#)

[Troubleshooting Printing Reports](#)

[Printing on All Browsers/OS](#)

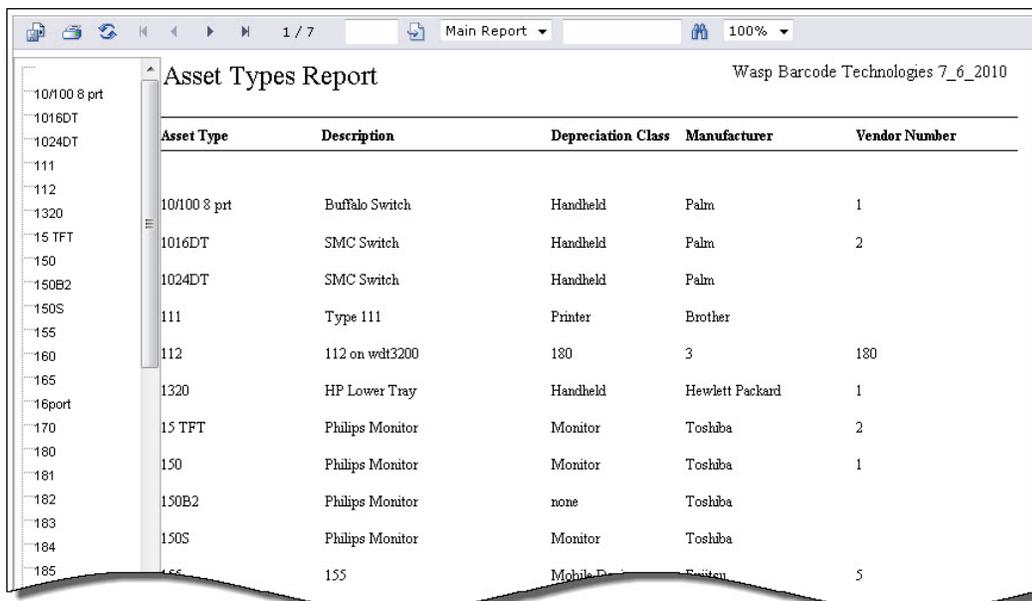
[Printing on Svr2008 64Bit IE8](#)

[Printing on Svr2003 64 Bit IE8](#)

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### Report Viewer Overview:

1. Reports are accessed from the **Main Menu** by clicking the **Reports** icon. A list of all reports will appear.
2. Click on the desired report. The report will open in the **Report Viewer**.



The screenshot shows a web browser window displaying the 'Asset Types Report' for 'Wasp Barcode Technologies 7\_6\_2010'. The report is presented as a table with the following data:

Asset Type	Description	Depreciation Class	Manufacturer	Vendor Number
10/100 8 prt	Buffalo Switch	Handheld	Palm	1
1016DT	SMC Switch	Handheld	Palm	2
1024DT	SMC Switch	Handheld	Palm	
111	Type 111	Printer	Brother	
112	112 on wdt3200	180	3	180
1320	HP Lower Tray	Handheld	Hewlett Packard	1
15 TFT	Philips Monitor	Monitor	Toshiba	2
150	Philips Monitor	Monitor	Toshiba	1
150B2	Philips Monitor	none	Toshiba	
150S	Philips Monitor	Monitor	Toshiba	
155	155	Mobile P...	Esiten	5

**Navigating Reports:**

**Contents Tree:** Use the Contents Tree to quickly jump to sections of the report. In the example Assets By PO Report shown below, the **Contents Tree** displays all Purchase Orders contained in the report. Clicking on PO in the Contents Tree will display that PO in the report area to the right. Notice that the selected PO appears highlighted (in orange) in the report.

Assets By PO Report Wasp Barcode Technologies 7\_6\_2010

pio 1550

po 1000

po 2000

po 206

po 21000

po 3000

po 3200

po 4000

po 5000

po 9

po wpa206

po1550

po2000

**Purchase Order:** po 9

Asset Tag	Description	Serial No	Purchase Date	Purchase Cost
79999	160: 160 all new on web		3/1/2010	\$1,000.0000
80004	2010: 2010 on web		3/1/2010	\$1,200.0000
80007	2010: 2010 on web		3/1/2010	\$900.0000
80008	2010: 2010 on web		3/1/2010	\$900.0000
80009	2010: 2010 on web		3/1/2010	\$900.0000
			3/1/2010	\$900.0000
			3/1/2010	\$1,000.0000
			3/1/2010	\$1,000.0000
			7/6/2007	\$900.0000
<b>Total:</b>				<b>\$47,500.0000</b>

Asset Tag	Description	Serial No	Purchase Date	Purchase Cost
4990	RT7D60: Dell S/Card Keyboard	CNOT68653717254500M D	11/19/2007	\$1,500.0000
<b>Total:</b>				<b>\$1,500.0000</b>

**Purchase Order:** po1550

Asset Tag	Description	Serial No	Purchase Date	Purchase Cost
3	E570: Toshiba e570 Handheld	palm 1550	5/22/2008	\$1,000.0000
<b>Total:</b>				<b>\$1,000.0000</b>

**Purchase Order:** po2000

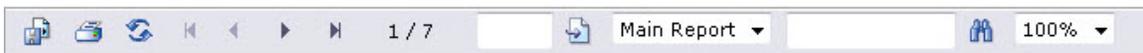
Asset Tag	Description	Serial No	Purchase Date	Purchase Cost
1137	Athlon: AMD Base	25CV21J	5/15/2008	\$2,000.0000
80018	Athlon: AMD Base		5/15/2008	\$2,000.0000
<b>Total:</b>				<b>\$4,000.0000</b>

**Grand Total:** **\$217,800.00**

**Click on a listing in the Contents Tree to jump to that section of the report.**

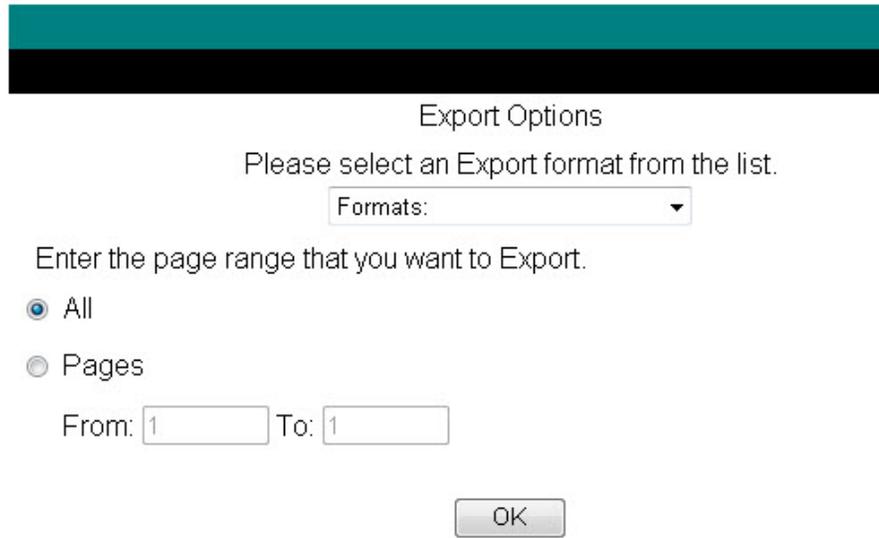
**Report Viewer Toolbar:**

The Toolbar at the top of the Report Viewer provides a variety of functions.



Each function is described below:

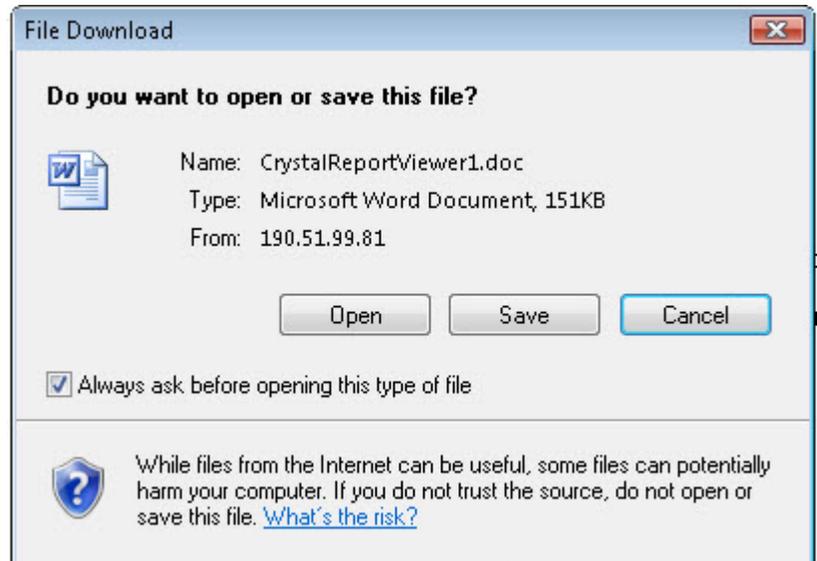
<p><b>Export</b></p>	<p>Allows you to export the current report to another format.</p> <p><b>To Export a Report:</b></p> <ol style="list-style-type: none"> <li>1. Click the <b>Export</b> button on the <b>Report Viewer Toolbar</b>. The following <b>Export</b> screen is displayed:</li> </ol>
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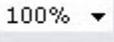
2. Select the format to which you want to export the report from the **Formats:** list.. Your options are:

Crystal Reports RPT  
 Acrobat Format PDF  
 MS Word  
 MS Excel 97-2000  
 MS Excel 97-2000 (Data Only)  
 Rich Text Format

3. Next enter the page range you want to Export. You can choose **ALL** to export of the report, or select **Pages** and enter a page range in the **From** and **To** fields.
4. Click the **OK** button when you are done entering criteria. For all **Formats** except **Save** screen will appear asking if you want to **Save** or **Open** the exported file.



5. Select **Open** to view the report immediately or **Save** to save the report to a specified location.

	location on your computer.
 <b>Print</b>	Accesses the <b>Print</b> feature.
 <b>Refresh</b>	Updates the current report with any new/changed information since the report was first run.
 <b>Navigation</b>	Use these buttons to navigate through the report. From left to right, the buttons are: <ul style="list-style-type: none"> <li>• Return to First page</li> <li>• Previous Page</li> <li>• Next Page</li> <li>• Jump to Last Page</li> </ul>
 <b>Page Number/Number of Pages</b>	This view only field displays the current page number/total number of pages in the report.
 <b>Go To</b>	Enter a page number in the field, then click the page icon go to that page.
 <b>Selection List</b>	
 <b>Find</b>	Enter a keyword or a number in this field, then click the binocular icon. The MobileAsset Web highlight any matching text it finds in the report.
 <b>Zoom</b>	Select a Zoom level from the drop down list.

## Troubleshooting Opening and Printing Reports

[Troubleshooting Opening Reports](#)

[Troubleshooting Printing Reports](#)

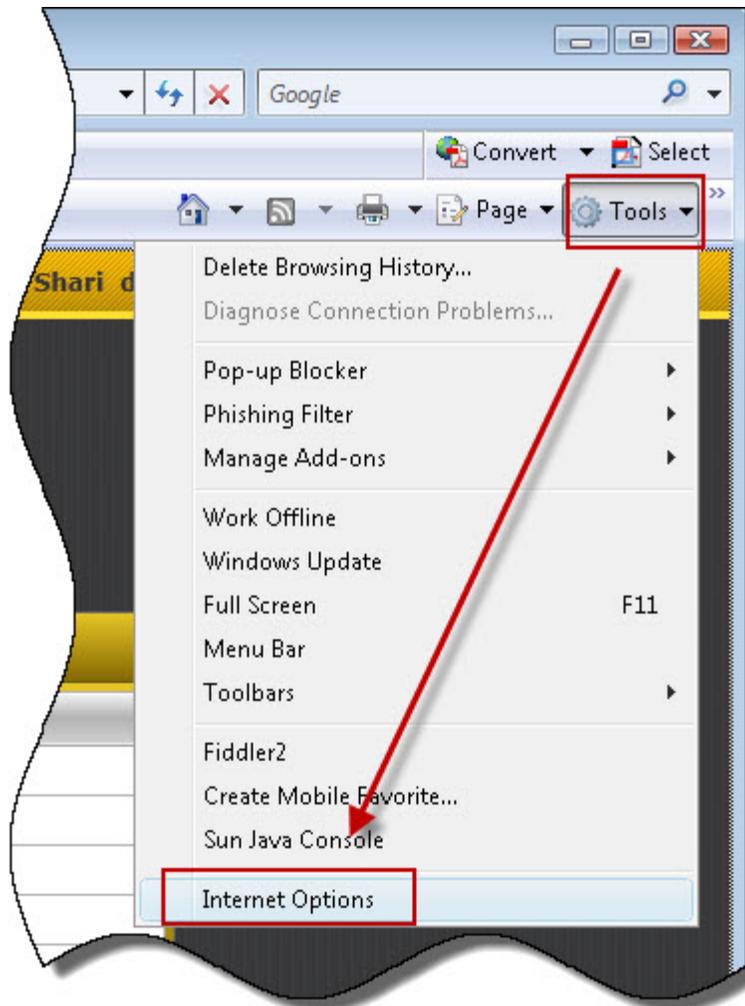
[Printing on All Browsers/OS](#)

[Printing on Svr2008 64Bit IE8](#)

[Printing on Svr2003 64 Bit IE8](#)

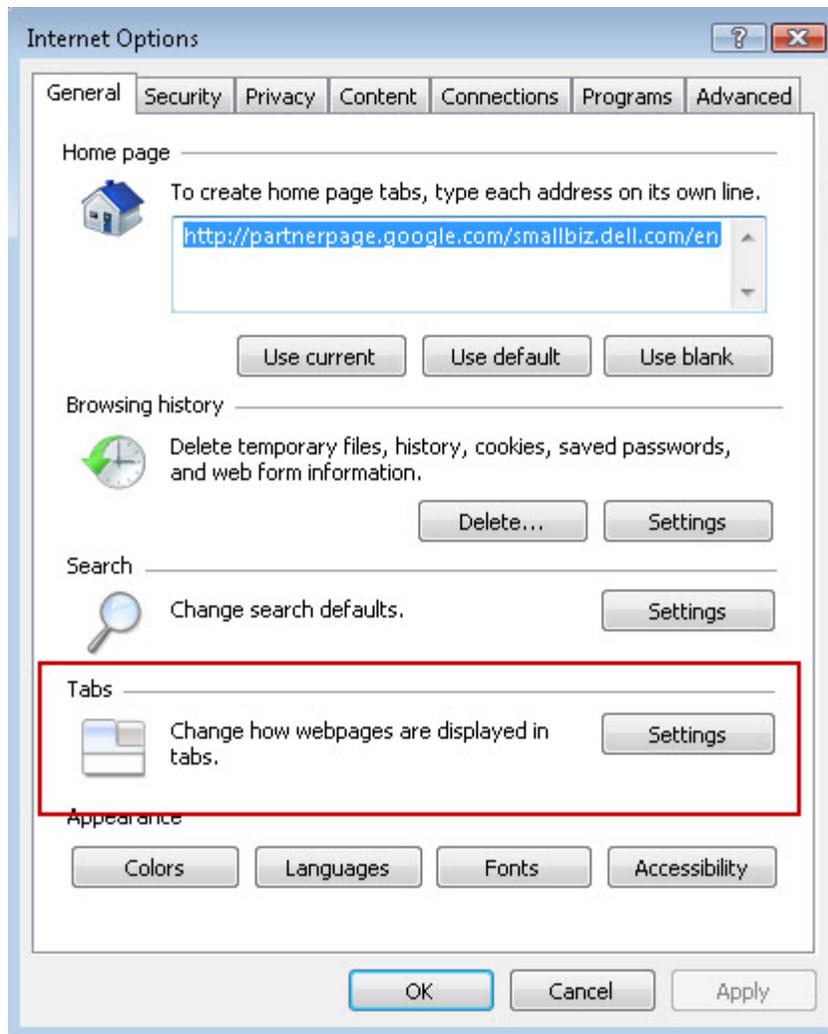
**Troubleshooting Opening Reports:** If you are unable to access the reports, make sure the following settings are correct:

1. Make sure the option "**Always open popups in a new window**" is selected on the **Internet Options** screen. To check this:
  - a. From the Internet Explorer toolbar, select **Tools > Internet Options**.



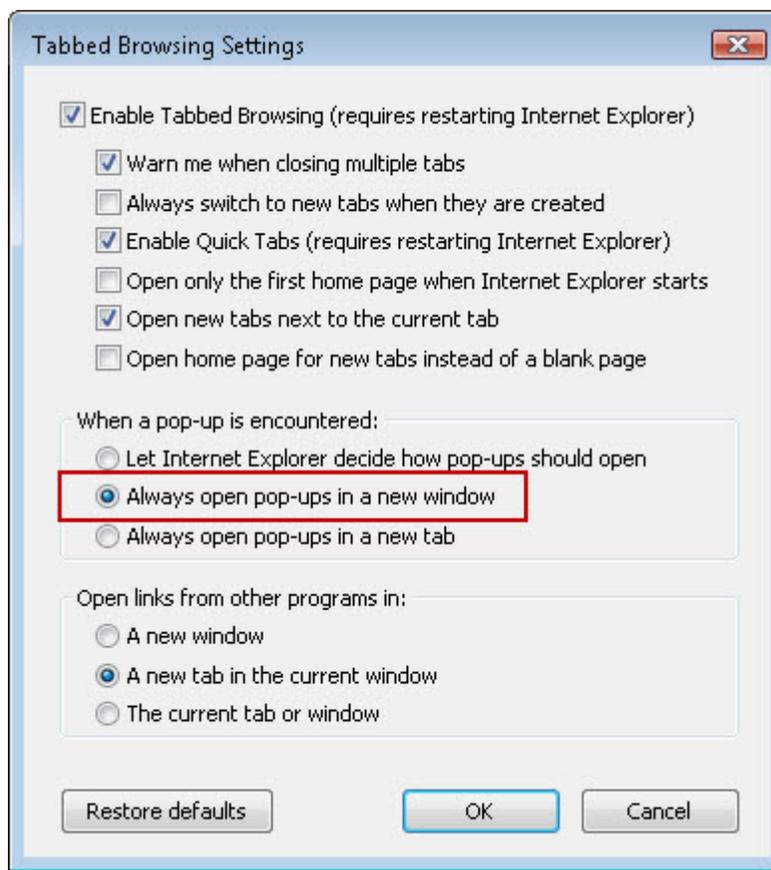
The **Internet Options** screen displays.

- b. On the **General** tab, select **Settings** in the **Tabs** section.



The **Tabbed Browsing Settings** screen appears.

- c. Make sure the option "**Always open popups in a new window**" is selected.



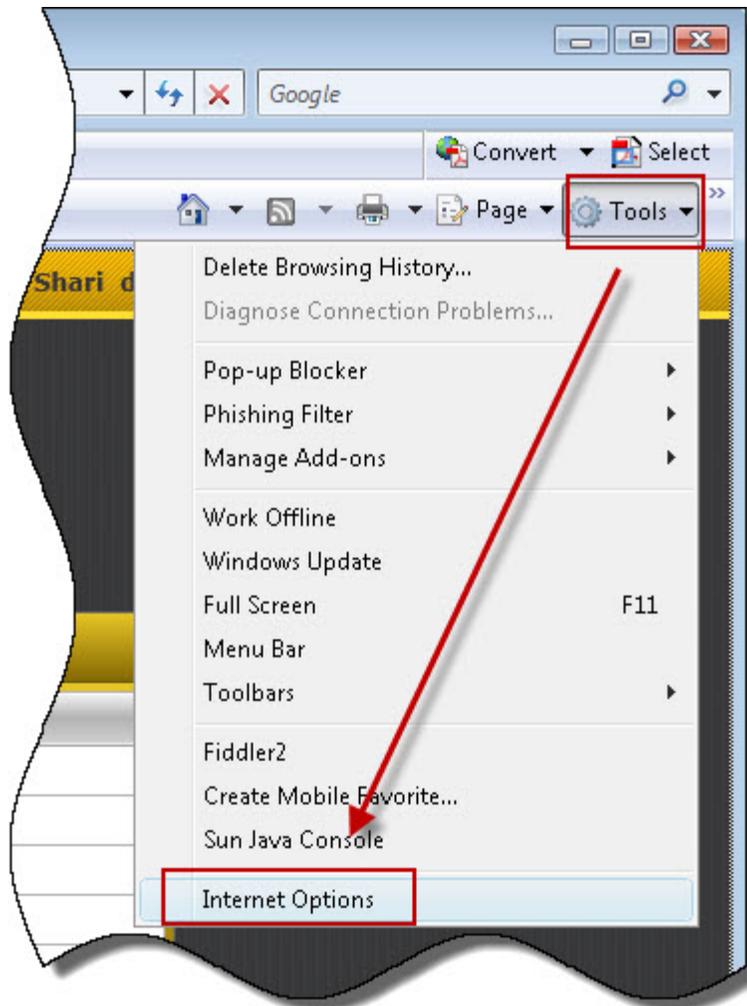
- d. Click **OK** on the **Tabbed Browsing Settings** screen to close it.
  - e. Click **OK** on the **Internet Options** screen to close it.
2. If you have Popup Blocker turned on, select "**Always Allow Popups from this Site**" when prompted. You will usually be prompted the first time you try to access reports from MobileAsset.

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**Troubleshooting Printing Reports:** If you are unable to print reports, make sure the following options are set correctly:

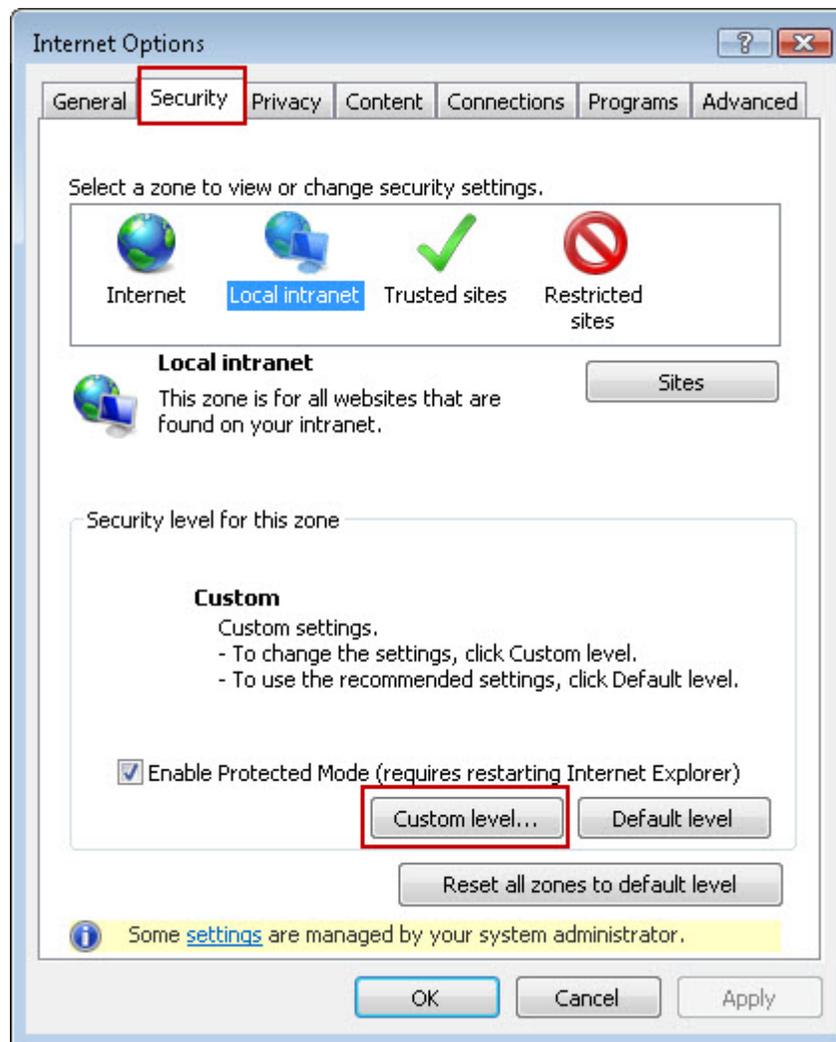
**Printing on All Browsers/OS:**

1. Make sure all **Active X** controls are set to **Enable**.
  - a. From the Internet Explorer toolbar, select **Tools > Internet Options**.



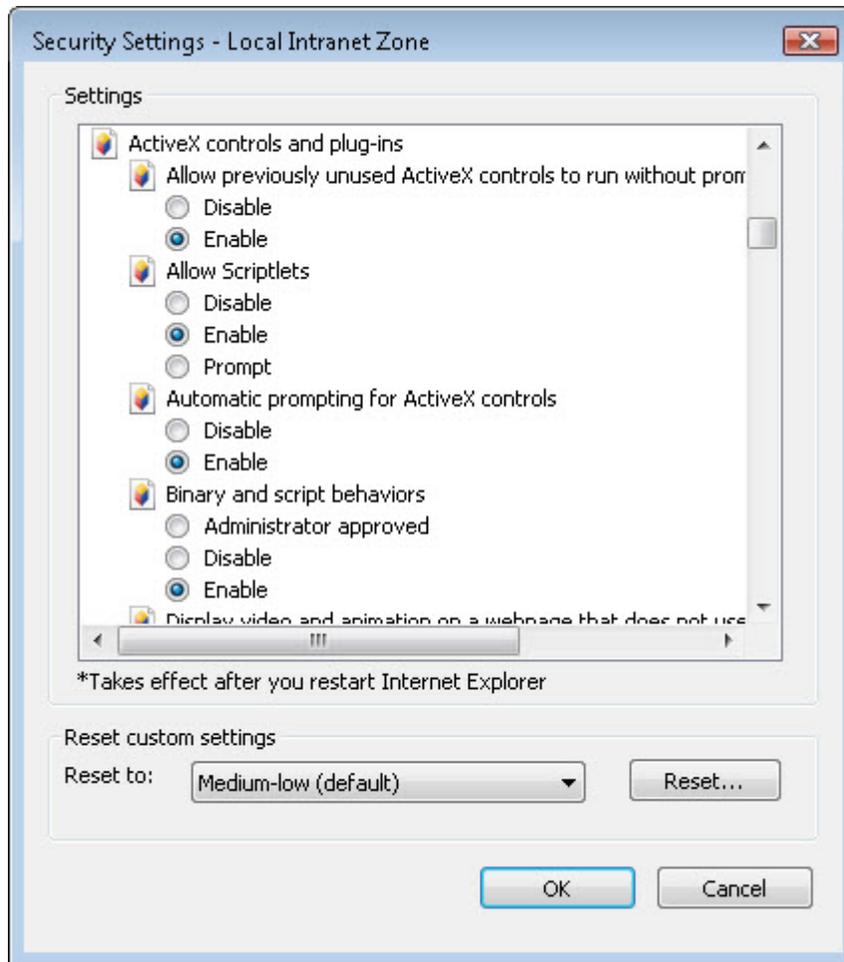
The **Internet Options** screen displays.

- b. On the **Security** tab, select **Local Intranet** and the **Custom Level** button.

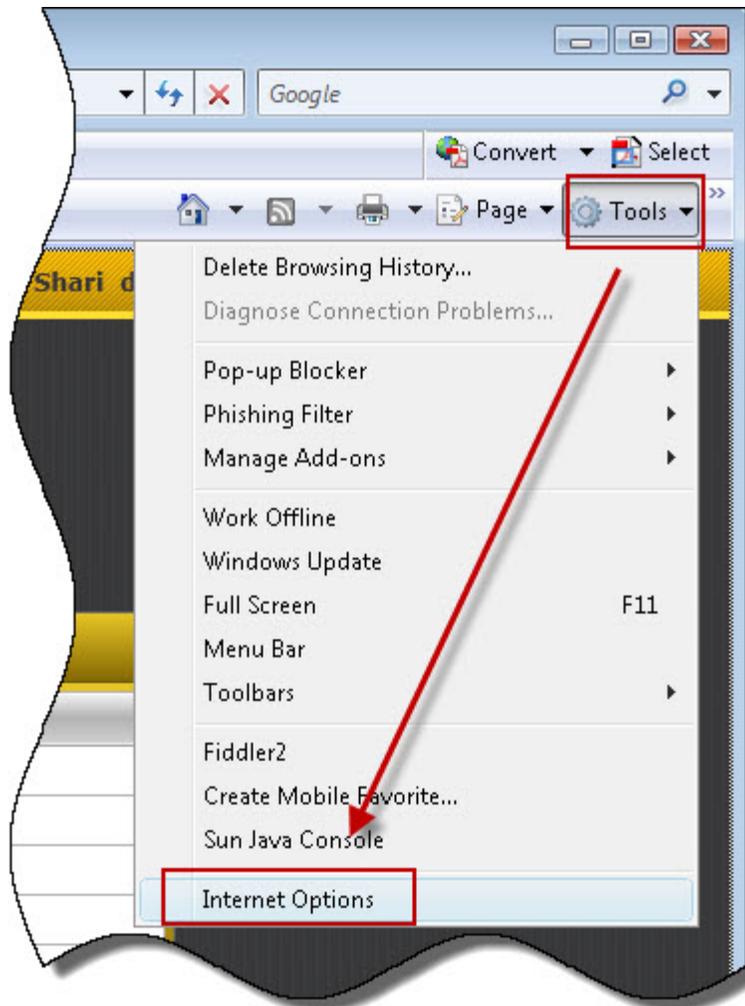


The **Security Settings** screen appears.

- c. On the **Security Settings** screen, make sure the Active X controls are set to **Enable**.

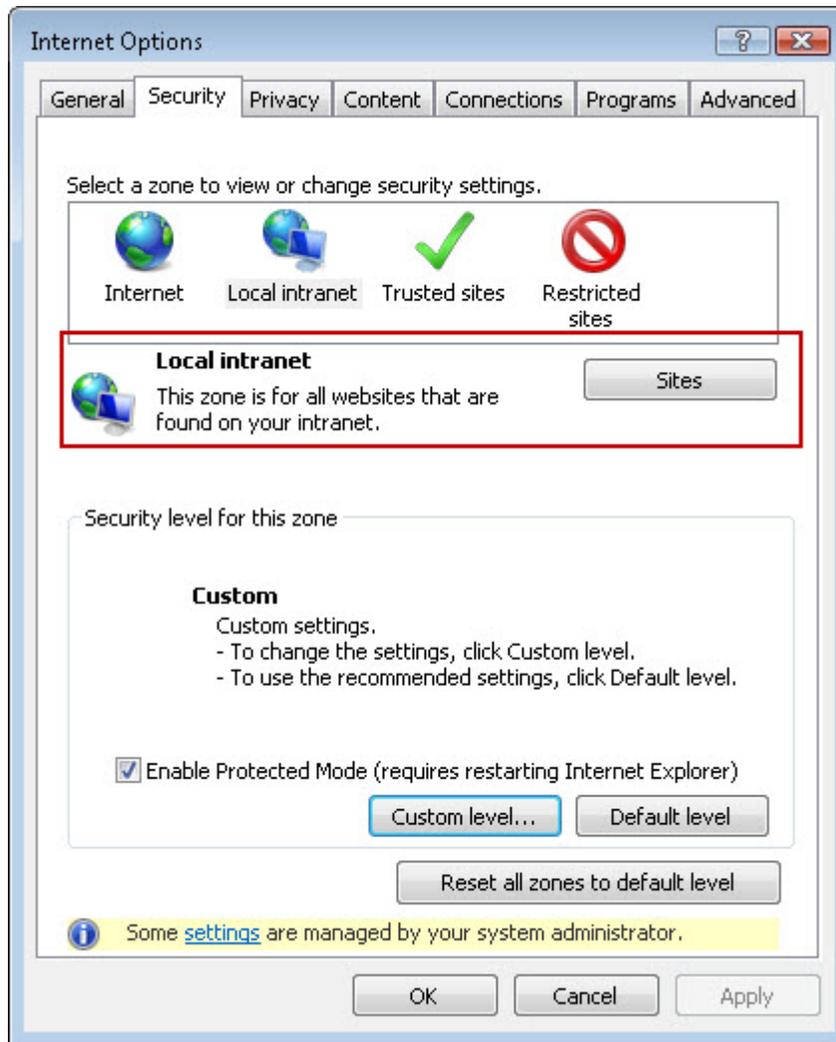


- d. Click **OK** to close the **Security Settings** screen.
- e. Click **OK** to close the **Internet Options** screen.
2. Add the MobileAsset website to your "safe" list. To do this:
  - a. From the Internet Explorer toolbar, select **Tools > Internet Options**.



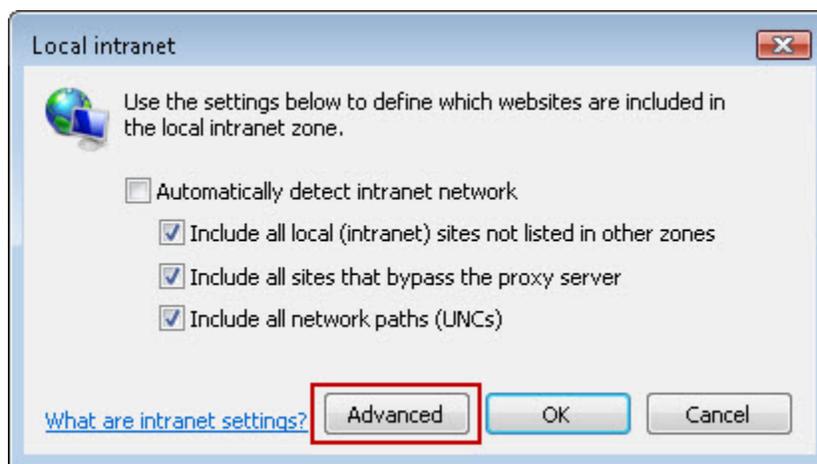
The **Internet Options** screen displays.

- b. Select Local Intranet and the Sites button.

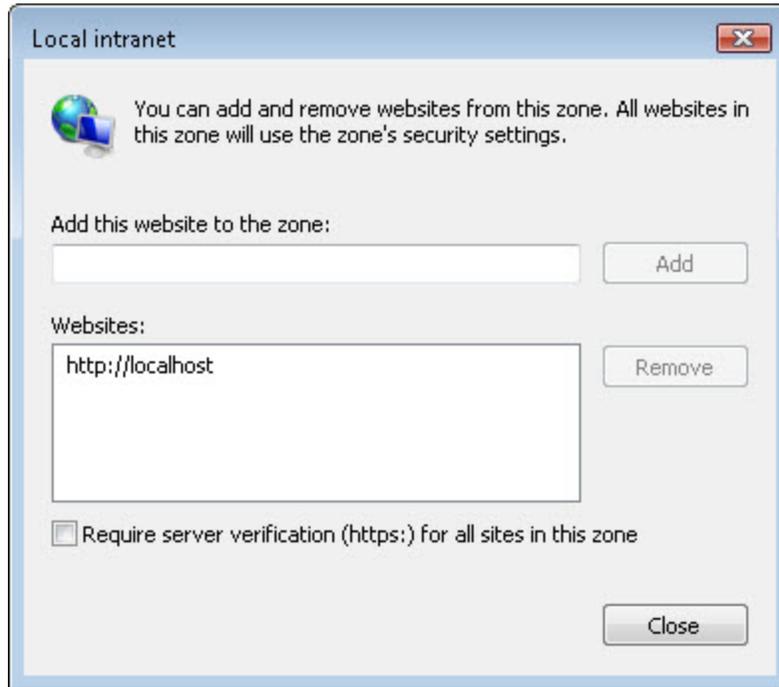


The **Local Intranet** screen appears.

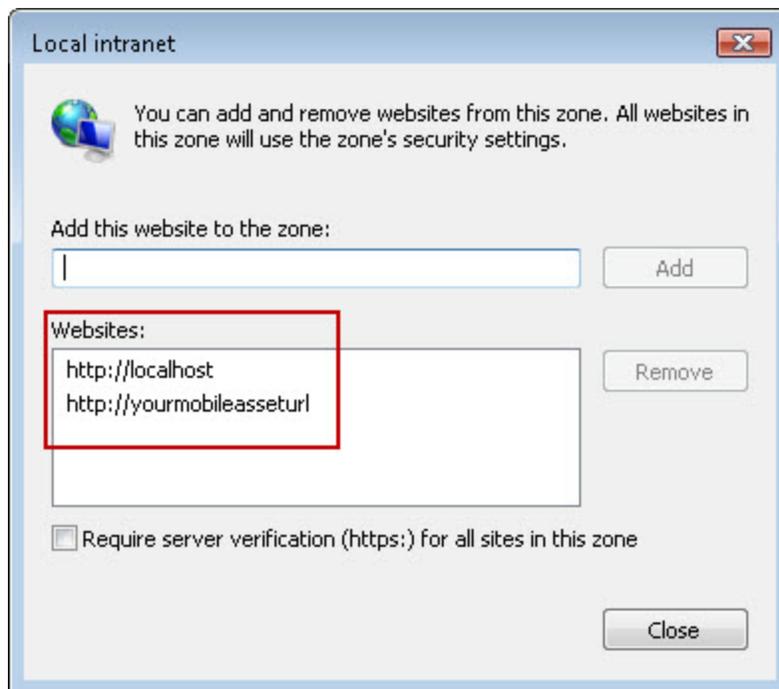
- c. Click the **Advanced** button.



- d. Enter the website address of your MobileAsset Web Module in the **Add this website to the zone** field and click the **Add** button.



The website will appear in the **Websites** list.



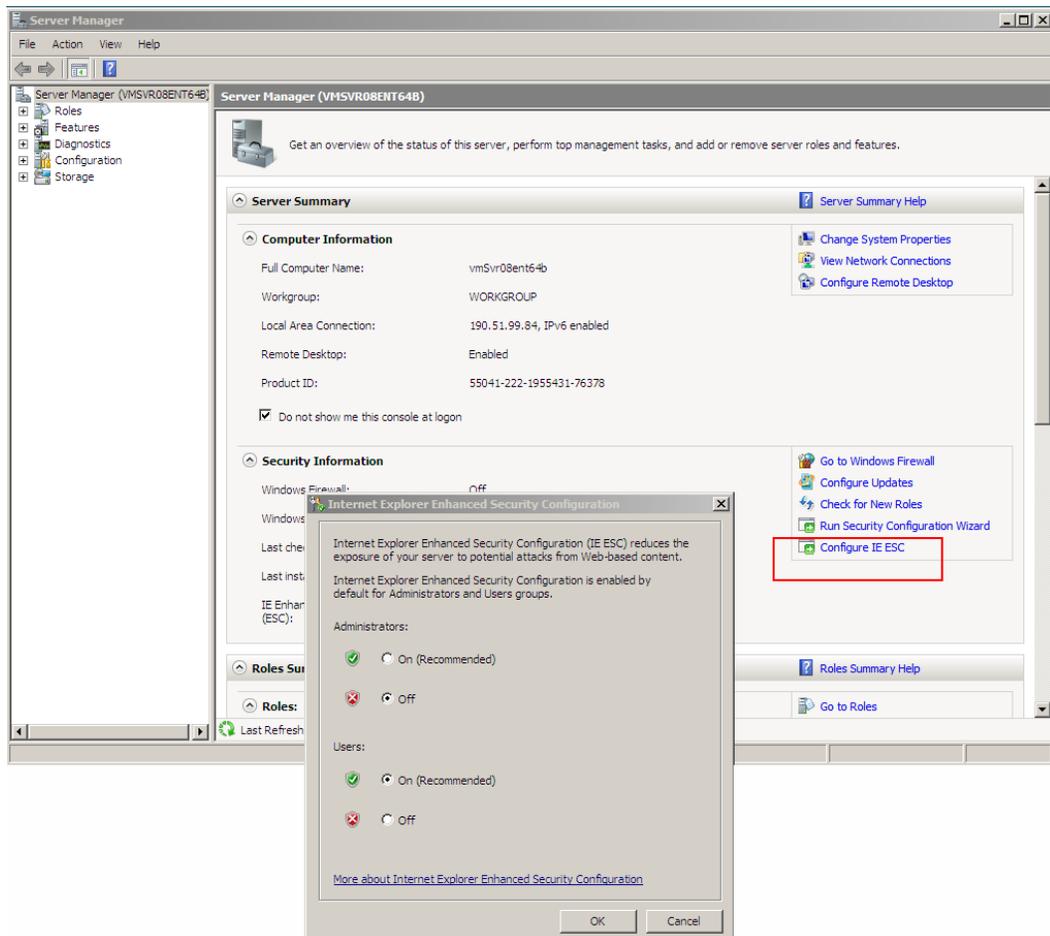
- e. Click **Close** to close the **Local Intranet** screen.
- f. Click **OK** to close the **Local Intranet** screen.

## MobileAsset Users' Manual

- g. Click **OK** to close the **Internet Options** screen.
  - h. Restart your browser.
- 

**Printing on Svr2008 64Bit IE8:** To enable printing on Svr2008 64 Bit IE8, follow the instructions below:

1. Open the **Start Menu**.
2. Right click **Computer** and select **Manage**. The **Server Manager** opens. Select **Configure IE ESC**.
3. Select **Off** for **Administrators** in the **Server Manager**.

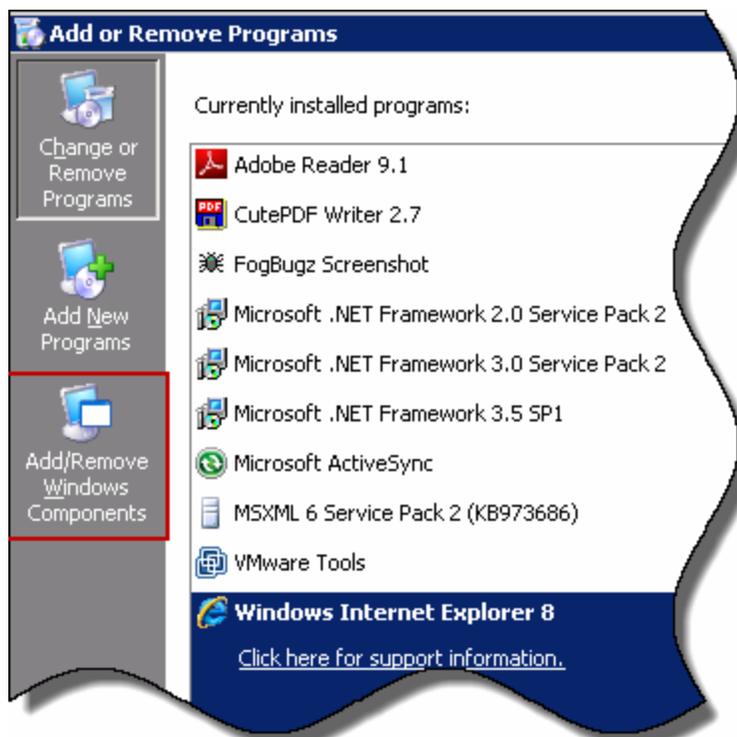


4. Open IE8 and select **Tools > Internet Options**.
5. On the **Security** tab, select **Trusted Sites > Sites**.
6. Uncheck "Require server verification (https:) for all sites in this zone".

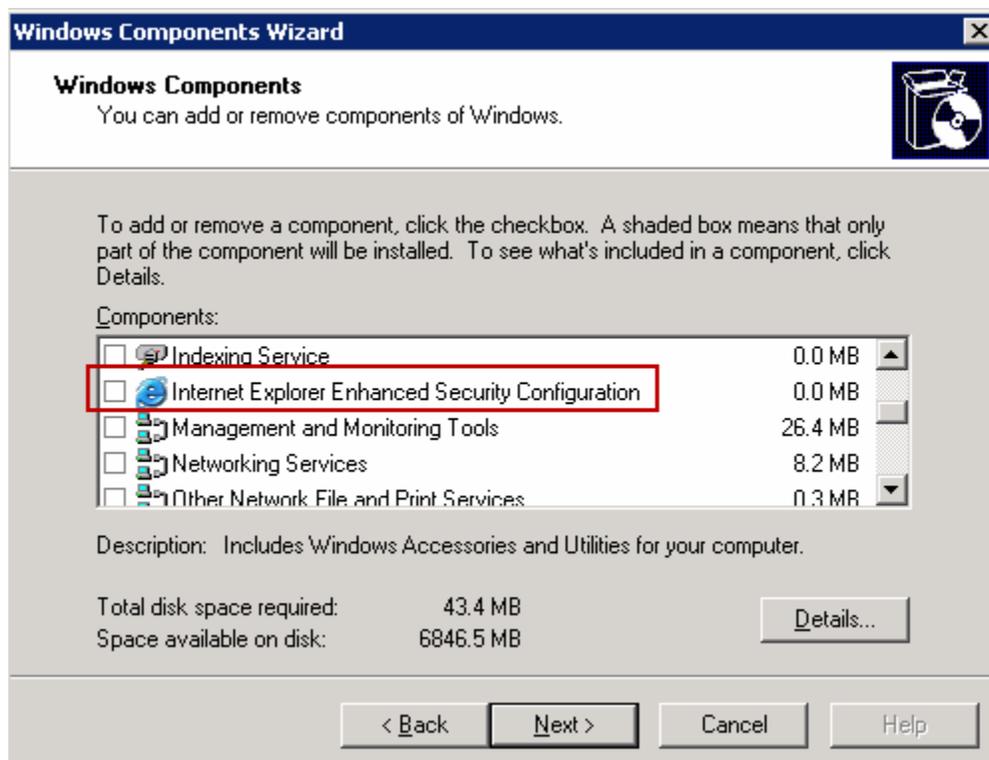
7. Enter the website address of your MobileAsset Web Module in the **Add this website to the zone** field and click the **Add** button.
8. Click **Close** to close the screen.
9. On the **Internet Options - Security** tab, select **Custom Level > Reset Custom Level > Medium Low**.
10. Click **OK**, then **Apply**.
11. Restart your browser. When you select the **Print** icon on a report you will be prompted to install the **Crystal Reports Viewer**. Install it following the on screen instructions.

**Printing on Svr2003 64 bit IE8:** To enable printing on Svr2003 64Bit IE8, follow the instructions below:

1. Open the **Start Menu**.
2. Select **Control Panel > Add/Remove Programs**.
3. On the **Add/Remove Programs** screen click **Add/Remove Windows Components**.



4. On the **Add/Remove Windows Components** screen, make sure **Internet Explorer Enhanced Security Configuration** is NOT selected.



5. Select **Next** to exit the Windows Components Wizard.
  6. Open IE8 and select **Tools > Internet Options**.
  7. On the **Security** tab, select **Trusted Sites > Sites**.
  8. Uncheck "**Require server verification (https:) for all sites in this zone**".
  9. Enter the website address of your MobileAsset Web Module in the **Add this website to the zone** field and click the **Add** button.
  10. Click **Close** to close the screen.
  11. On the **Internet Options - Security** tab, select **Custom Level > Reset Custom Level > Medium Low**.
  12. Click **OK**, then **Apply**.
  13. Restart your browser. When you select the **Print** icon on a report you will be prompted to install the **Crystal Reports Viewer**. Install it following the on screen instructions.
-

# Reservations

## Reservations Overview

The **Reservations** module allows you to mark an asset or multiple assets as reserved for a specific employee or customer. The Reserved period can be for a single date or a range of dates. Assets that are reserved cannot be checked out to other employees/customers during the reservation period.

Users given security access to the module can create reservations. Those reservations will then need to be approved before they become active. Approve Reservations

The Reservations module contains the following features:

[Create New Reservation](#)

[Manage Reservations](#)

[Approve Reservations](#)

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## Create New Reservation

The **Create New Reservation** screen allows you to designate one or more assets as reserved for a selected employee or customer for a specified period of time.

### To Create a Reservation:

1. From the **Main** screen, select **Reservations > Make a New Reservation**. The **New Reservation** screen appears:

2. The top of the **New Reservation** screen is the **General Information** section. You may notice that some fields in this section have a **Pin** icon in front of them. These fields represent data that can be "pinned". **Pinning** allows you to "lock" the information entered into a field. This is convenient if, for example, you are entering multiple new assets for a particular site and location. You can enter the site and location once, then pin them. The fields will retain the information you entered through each new entry until you unpin them. Pin a field by clicking on its pushpin. Click the pushpin again to unlock the field for entry of a different value.

This section is where you will enter:

- **Reservation Number:** This unique identifier can be manually entered, or you can select the  icon next to the **Reservation Number** field. When the icon is pressed, MobileAsset will assign the reservation the next available reservation number. **Reservation Number** is a required field.

- **Reference Number:** This optional field is a number used for your reference. This number is not tracked by MobileAsset.

- **Customer/Employee Drop Down:** Select whether this reservation is for a customer or an employee. Then use the drop down box to assign a specific customer or employee. Select **<MORE>** to access the **Customer List** or **Employee List**. This is a required field.
  - **Urgency:** This field allows you to assign an level of urgency to this reservation. This is useful if more than one reservation is created for the same asset at the same time. The person approving the reservations can quickly refer to the assigned **Urgency** of the request to help determine which reservation to approve.
  - **Notes:** You can optionally enter notes on this reservation. To add a note, click in the field and type in the information.
  - **Request Status:** This view-only field lists the current status of this reservation. Possible **Statuses** are **New, Pending, Approved** and **Rejected**.
3. Now you can select those assets or asset types you want to reserve. You can select a specific asset or, if you do not care which asset is reserved, select an asset type. For example, if you want to reserve an HP laptop for an employee, but don't care which HP laptop, select the Asset Type - HP Laptop. MobileAsset will assign an asset within the Asset Type to this reservation.

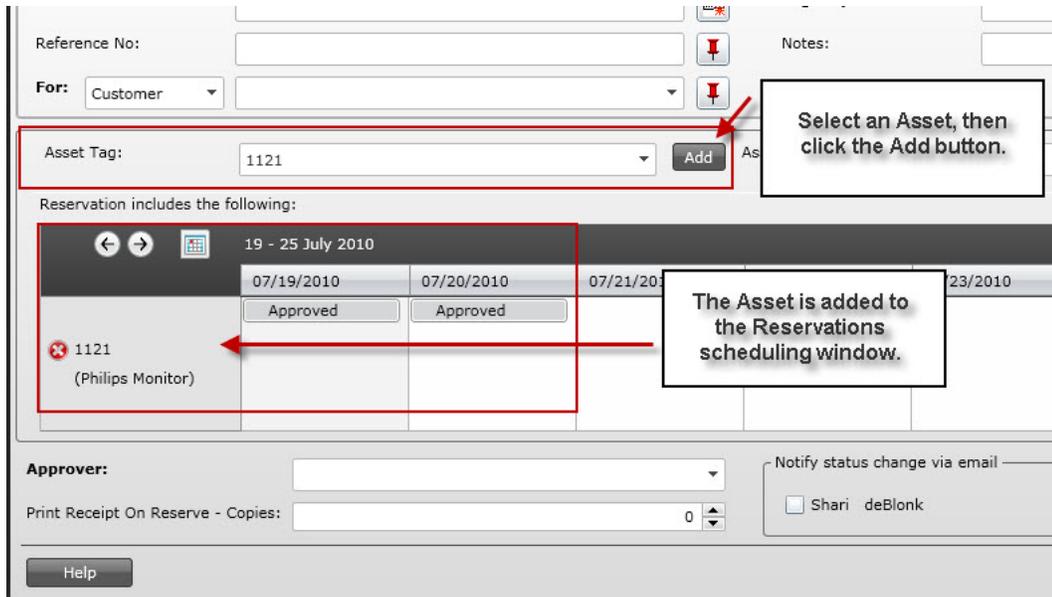
**Asset** - Manually type in an asset or select an asset from the drop down list. Select **<MORE>** to access the **Asset List**. After you have made your selection, click the **Add** button.

**OR**

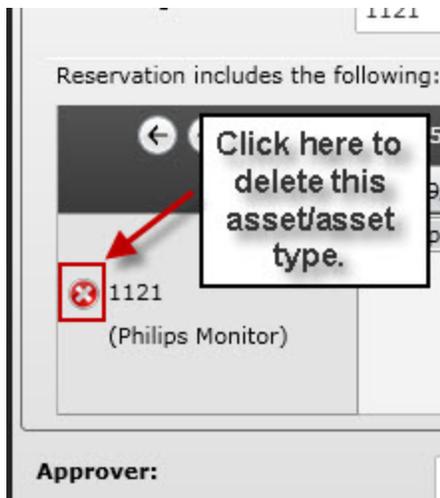
**Asset Type** - Manually type in an asset type or select an asset type from the drop down list. Select **<MORE>** to access the **Asset Type List**. After you have made your selection, click the **Add** button.

Your selection will appear in the scheduling window. Repeat this step until you have added all Assets or Asset Types you need for this reservation.

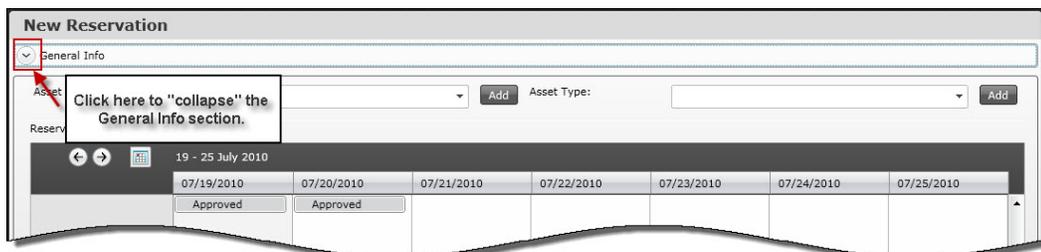
If the selected asset already has a reservation or is checked out, a notice will appear on the appropriate date. In the example below, asset 1121 already has an Approved reservation for July 19 - 20.



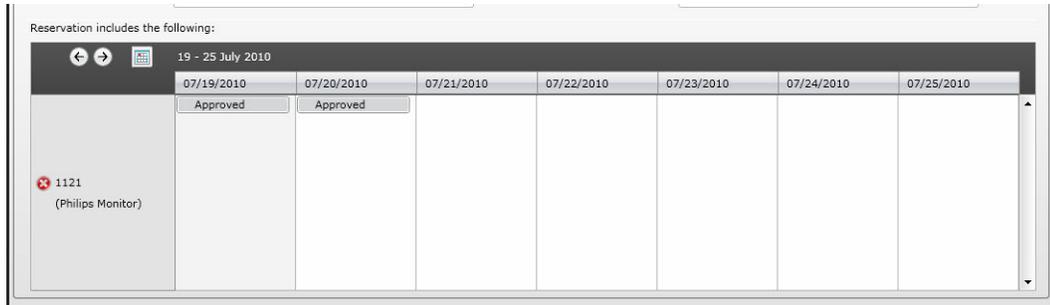
Click the red x icon to delete the asset from the reservation.



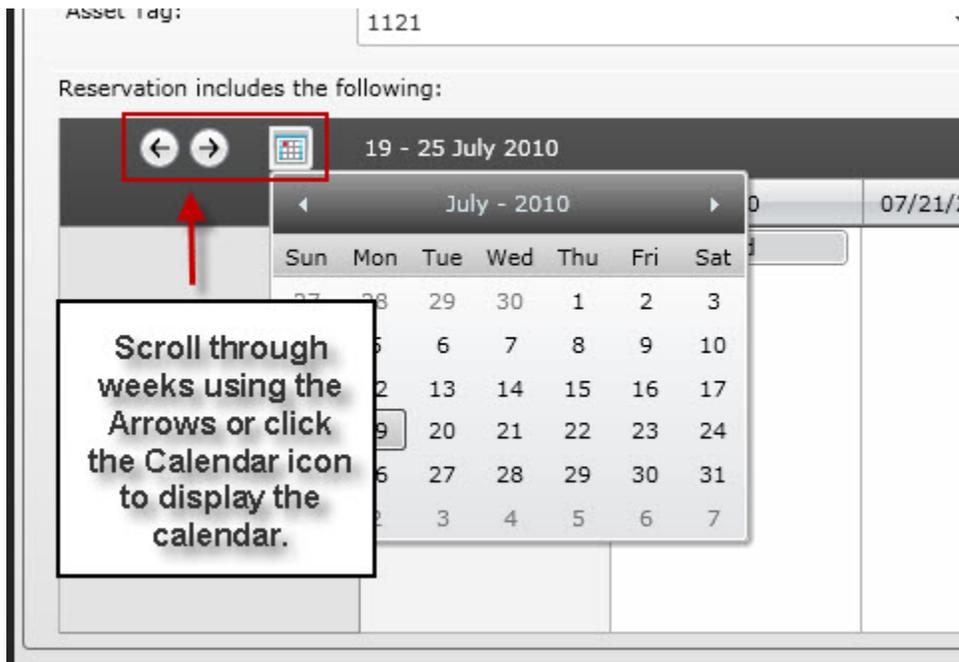
**Hint:** Click the arrow icon in the top left corner of the **General Information** section to minimize this section. This will enlarge the viewing area of the list of the scheduling window.



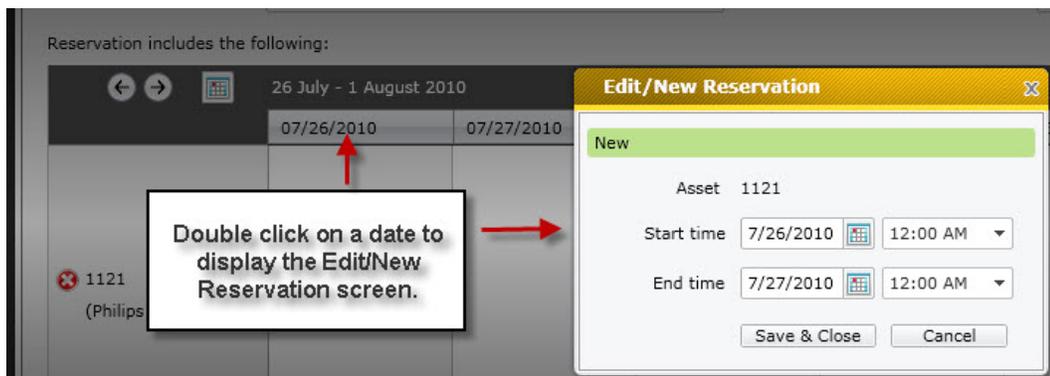
4. Use the **Scheduling Window** to select the dates for which you want to reserve the selected asset(s) or asset type(s).



You can scroll to different dates using the arrow buttons, or select a date from the calendar by clicking the **Calendar** icon.

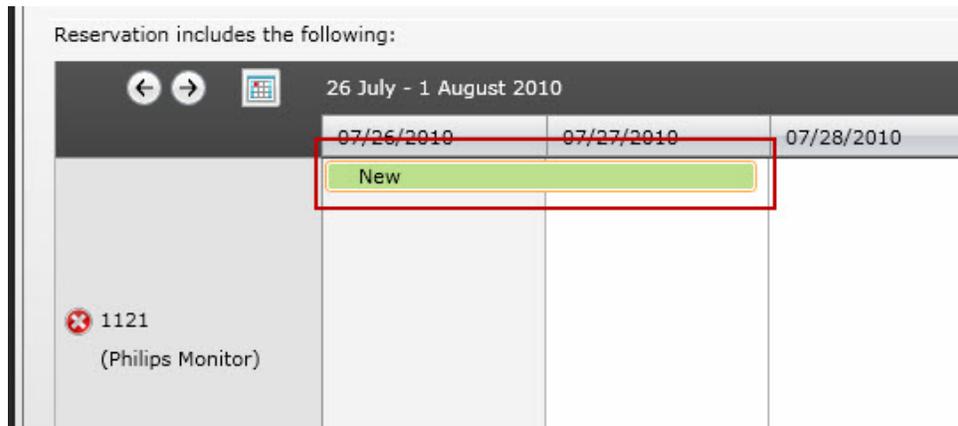


Double click on a date to display the **Edit/New Reservation** screen:

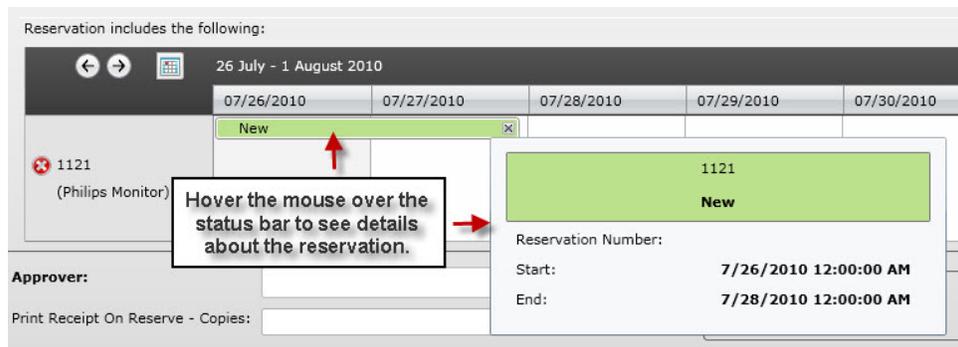


- a. Enter a **Start** and **End Date** for this reservation by manually entering a date, or click the **Calendar** icon to select a date.
- b. Use the drop down menus in the **Time** fields to select a **Start** and **End Time**.

- c. Click **Save and Close** on the **Scheduling Options** screen to return to the **Create New Reservations** screen. Now a bar with the current reservations status will appear in the selected dates.

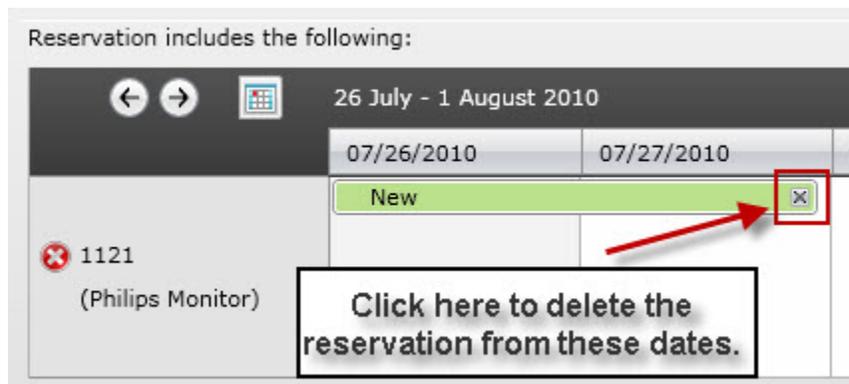


Hover the mouse over the status bar to view the reservation details.



Click twice on the status bar to open the **Edit/New Reservation** screen and make changes to the reservation date or time.

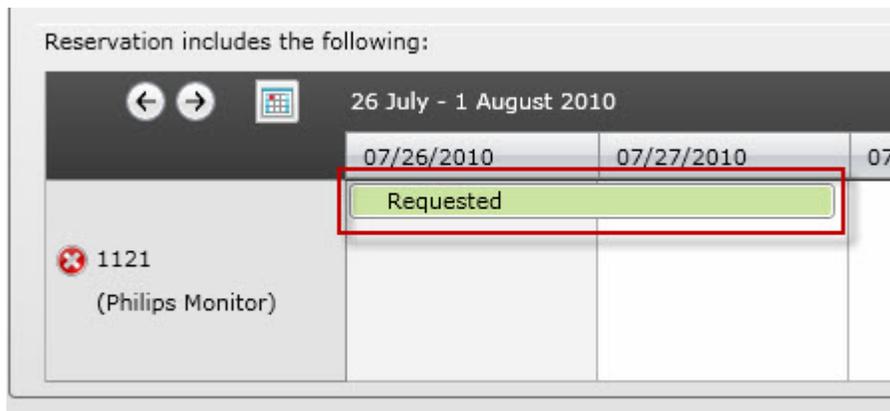
Hover the mouse over the status bar and click the **x** icon that appears to delete the reservation from these dates.



- d. Repeat these steps for all assets/asset types in the **Scheduling Window**.

- Now you can select someone to **Approve** the Reservation. Manually type in a name in the **Approver** field or use the drop down list to make a selection. The drop down list displays all users granted permission to **Approve** Reservations (setup in **Administration > Security**).
- You can optionally enter a number in the **Print Receipts on Reserve - Copies** field. The number of copies entered will print to the designated printer (setup in the MobileAsset PC application) upon selecting the **Reserve** button.
- The **Notify Status Change via Email** section allows you to select to send a notification e-mail to yourself, to the **Approver** and to the Customer/Employee if the Reservation's status changes.
- Click the **Reserve** button when you have completed entering information for this reservation. When you click **Reserve**, an email is automatically sent to the **Approver** notifying him/her of the new Reservation. This initial e-mail is sent whether or not you have select to send notification e-mails to the **Approver** in the **Notify Status Change Via Email** section.

Notice that once you click **Reserve**, the status of the Reservation changes to **Requested**.



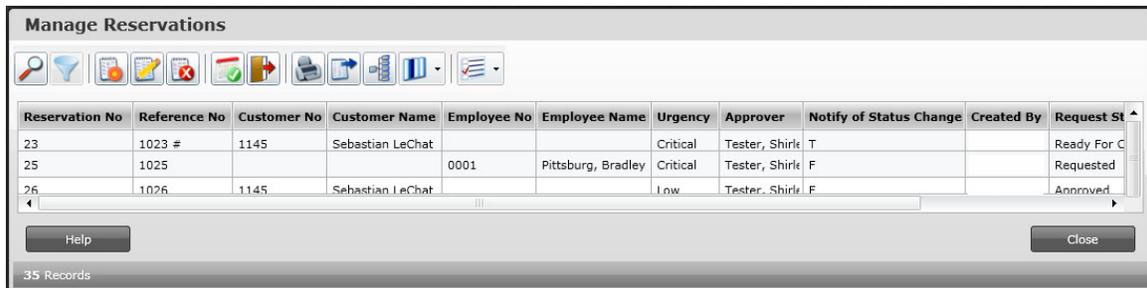
- Click **Close** to close the **Create New Reservation** screen.

## Manage Reservations

The **Manage Reservations** screen allows you to access, view, edit and create new reservations. This screen functions the same as other list screens in MobileAsset. For more information on using the List screens, please refer to the topic [Working with Lists](#).

To access the **Manage Reservations** screen, click **Reservations > Manage My Reservations**.

Below is an example of the **Manage Reservations** screen:



The screenshot shows the 'Manage Reservations' screen with a toolbar at the top containing icons for search, filter, add, edit, delete, refresh, print, and list. Below the toolbar is a table with the following data:

Reservation No	Reference No	Customer No	Customer Name	Employee No	Employee Name	Urgency	Approver	Notify of Status Change	Created By	Request St
23	1023 #	1145	Sebastian LeChat			Critical	Tester, Shirle	T		Ready For C
25	1025			0001	Pittsburg, Bradley	Critical	Tester, Shirle	F		Requested
26	1026	1145	Sebastian LeChat			Low	Tester, Shirle	F		Approved

At the bottom of the screen, there are 'Help' and 'Close' buttons, and a status bar indicating '35 Records'.

## Approving Reservations

After a Reservation is created, it needs to be **Approved** by the assigned user before the asset is actually held in reserve. The **Approve Reservation** screen allows you to see those reservations assigned to you and to **Approve** or **Reject** them as needed. You can also **Check Out** approved reservations directly from this screen.

### Approving/Rejecting Reservations:

1. From the **Main Menu**, click **Reservations > Approve Reservations**. The **Approve Reservation** screen appears:

2. The **General Information** section at the top of the screen displays basic data about the **Reservations**. The following information is contained in this section:

- **Reservation No:** This drop down list contains any Reservations assigned to this user. Click the drop down list to display the list and select a **Reservation**.

- **For: Customer/Employee:** This field displays the unique identifier of the Customer/Employee associated with this Reservation.
  - **Reference No:** The Reference No assigned to this Reservation (if any) displays here.
  - **Notes:** Any notes entered on this Reservation appear here.
  - **Urgency:** The assigned urgency displays here. Urgency levels are **Critical**, **Normal** and **Low**.
3. After you select a reservation from the **Reservation No** drop down list, the assets assigned to the reservation appear in the **Reservation Details** section.

The screenshot shows the 'Approve Reservation' window. At the top, there is a 'General Information' section with fields for Reservation No (74), Reference No (A7712), Urgency (Normal), and Request Status (Requested). Below this is the 'Reservation Details' section, which contains a table of assets. The table has columns for Asset Tag, Asset Description, Start, End, Asset Type, Asset Type, Quantity, and Last Updated. The first row shows an Asset Tag of 1121, Asset Description of Philips Monitor, Start of 7/28/2010, End of 7/29/2010, Asset Type of 150, Asset Type of Philips Monitor, Quantity of 1.00, and Last Updated of 7/26/2010. The second row shows an Asset Tag of 7/28/2010, Asset Description of 7/29/2010, Asset Type of 10/100 8 prt, Asset Type of Buffalo Switch, Quantity of 1.00, and Last Updated of 7/26/2010. At the bottom of the window, there are checkboxes for 'This Request Is Ready For Checkout.' and 'Request Approval From', a 'Comment' field, and buttons for 'Help', 'Approve', 'Check Out', 'Reject', and 'Close'.

Asset Tag	Asset Description	Start	End	Asset Type	Asset Type	Quantity	Last Updated
1121	Philips Monitor	7/28/2010	7/29/2010	150	Philips Monitor	1.00	7/26/2010
7/28/2010	7/29/2010	7/28/2010	7/29/2010	10/100 8 prt	Buffalo Switch	1.00	7/26/2010

Asset Tags and Asset Types are listed differently in the **Reservation Details** window. In the example above, the first listing is an Asset Tag, and lists the Tag number and the Asset Description. The second listing is an Asset Type so the Asset Tag and Asset Description fields are blank.

You can approve/check out all the assets or asset types listed by checking the **Select All** box.



#### To Approve/Reject Reservations with Only Asset Tags:

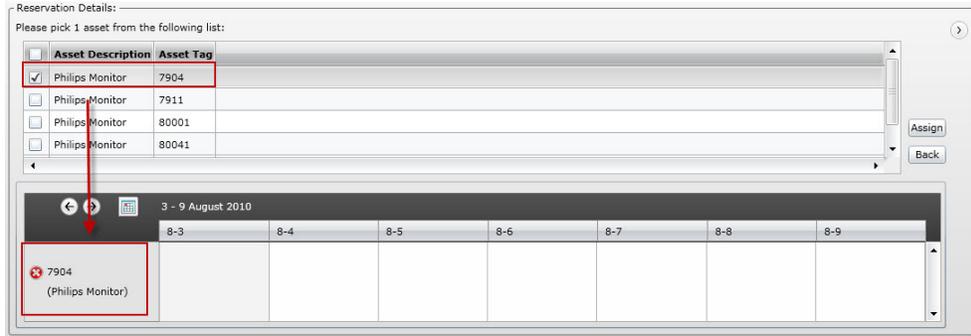
- a. Select the assets you want to Approve or Reject, then click the **Approve** or **Reject** button.

#### To Approve Reservations with Asset Types:

- a. When you select an asset type from the **Reservations Detail** window, or when you click the **Select All** checkbox when asset types exist in the window, the **Reservations Details** section changes to display all available assets for that asset type along with a schedule window.



- b. Select an asset to view that asset's schedule (when it is checked-out or reserved). MobileAsset will filter out any assets of the selected asset type that are checked out during the requested **Reservation** period.



- c. Click the Assign button when you have chosen the asset you want to assign to this Reservation. The selected asset tag will appear in the Reservations Details section.

Reservation Details: -

<input checked="" type="checkbox"/>	Asset Tag	Asset Description	Start	End	Asset Type	Asset Type	Quantity	Last Updated	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	7904	Philips Monitor	8/4/2010	8/6/2010	150	Philips Monitor	1.00	8/3/2010

- d. If you want to check out the assigned asset(s) at the same time you approve the Reservation, select the **This Reservation is ready for check-out** checkbox.
- e. If you want to have another person approve this **Reservation**, select a name from the **Request Approval From** drop down list.
- f. You can leave a comment by clicking in the **Comment** field and typing in a note.
- g. When you are ready to approve the Reservation, click the **Approve** button.

If you want to reject the Reservation, click the **Reject** button.

If you have selected the **This Reservation is ready for check out** checkbox, the **Check Out** button will be enabled. Click **Check Out** to simultaneously **Approve** the Reservation and **Check-Out** the assigned asset(s). The **Check Out** screen will appear populated with the asset(s) from the current Reservation. *Reservation Check Out* will appear in the **Notes** section. For more information on completing the **Check Out** screen, please refer to the topic [Checking Out Assets](#).

# Working with Multiple Companies

## Working with Multiple Companies

The Enterprise version of MobileAsset allow you to create databases for multiple companies.

This means that if you have two separate entities for which you want to maintain assets, you can install one instance of MobileAsset, then create two databases - one for each company. A database is the repository for all information about your company. Everything from your company's name and address, to your employee information, to your asset information is stored in the database. If you need to track asset information for two separate companies, you wouldn't want to group that information into one database, as it would be impossible to know to which company the asset belongs. Creating a database for each company allows you to enter sites, locations, customers, employees, assets, etc. that are specific to one company. In addition, each company has its own security so you can control who has access to a specific company.

Below are the steps to setting up and working with multiple companies:

1. **Create Your Databases:** To work with multiple companies, you will need to first create your databases using the **Wasp Database Manager**. You will need a database for each company. For more information on the **Wasp Database Manager**, please refer to the **Database Manager** online help. To open the **Database Manager**, click on **Start > All Programs > Wasp > MobileAsset > Database Manager**.
  2. **Log In to MobileAsset:** After you setup your databases, when you log in to MobileAsset, the [Company Selection List](#) will appear first. Select which company you want work in. If you have access to more than one database, this screen will appear each time you open MobileAsset so you can specify which company you want to access.
  3. **Set Up Your Databases:** Create Sites, Locations, Asset Types, etc. for each company. You will need to follow the steps in [Getting Started](#) for each company you create.
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## Company Selection List

The **Company Selection List** page appears after you log on to MobileAsset if you have created multiple databases and you have access to more than one database.

### Selecting a Company:

1. After logging in to MobileAsset, you will see a page similar to the following (if you have created multiple databases and you have access to more than one database). You will only see those companies to which you have been given access in **Security** in MobileAsset on the PC. The first time you log in using the Admin login, you will see all companies.



Company	Group Name
Wasp Barcode Technologies	
Test DB 6-4-10	
WaspTrackAssetMain	Wasp Team
WaspTrackAssetMain	Wasp Development

2. Click on the company you wish to access. MobileAsset will open with the desired company's information displayed. Note that the title bar at the top of the window indicates which company you currently have open.

Click **Cancel** on the **Company Selection List** to return to the **Log In** page.

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