

MobileAsset *Manual*



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MobileAsset Install Key _____
(Printed on shipped material)

MobileAsset Registration Key _____
(Obtained from <http://www.waspbarcode.com/Register/default.asp>)

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Chapter 1: Getting Started

The following steps will get you started using this software both on the PC and on your mobile device(s). Click on the links provided below to view detailed instructions for completing each step.

Note: Most screen shots in this Help file are of the Professional version of MobileAsset. Not all features/tabs shown in these screens are available in the Standard version of MobileAsset. For information on the benefits of upgrading your software, please click on **Help > Benefits of Upgrading**.

If you will be using MobileAsset for multiple companies, you will need to create the additional databases using the Database Manager. Database backup and restore functions are also performed on the Database Manager. The Database Manager can be accessed from **Start > All Programs > Wasp > MobileAsset > Database Manager**. For detailed instructions on backing up databases using the Database Manager, please refer to the Database Manager online help.

1. **Add Groups:** User security in MobileAsset is set up by Group. (**Administration > Security > Group Manager**) A Group is a collection of security settings that one or more users share. You will need to create your Groups first, then add users and assign them to Groups. Before setting up your groups, take some time to think about the types of employees you have, who will need access to the software and what features/functions they will need to use in the software. You will want to create a Group for each different type of user you may have. You may need a Group for Managers, who have access to all Sites, Reports, Auditing, etc. Another group might be Supervisors who only need access to Reports and basic functions such as check in/out, but don't need access to Auditing. A third Group may be comprised of warehouse workers who need access to the mobile devices, but don't need to be able to log on to the PC.
2. **Add Users:** When you first logon to MobileAsset you will use Admin as the user name and leave the password blank. This default user profile gives you access to everything in the system. The first step you should take upon logging in is to create additional users (Administration > Security > User Manager). You should enter all users who will be using the system and you can assign specific rights to each user that limit their activities to certain functions. You should also setup at least one additional admin user who has rights to all areas of the system.
3. **Enter Company Information:** Next you should enter your company's information (Administration > Company Information). On the **Company Information** screen you will enter your company's name and any addresses needed for receiving, shipping, corporate correspondence, etc. The company name you enter on this screen will appear on all reports and in the title bar of MobileAsset.

Note: You can setup a company(s) using a single database in MobileAsset. If you need multiple databases, use the Database Manager to create however many you need. Please refer to the Database Manager Online Help for more information on creating multiple databases. For details on using multiple companies with different databases, please refer to the topic [Working with Multiple Companies](#).

4. **Create Sites** and **Create Locations:** Now 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 you 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 MobileAsset's 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 with one Location at that Site.

5. **Create Vendors, Create Manufacturers, Create Depreciation Classes:** These are all optional features. You can manually create or import this information. It is helpful to enter this information prior to setting up your assets.
6. **Create Asset Types:** 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.

7. **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.
8. **Prepare Your Mobile Devices:** Prepare your mobile device(s) for use, referring to the printed Quick Start Guides that accompany them. The Quick Start Guides are also available for download at <http://support.waspbarcode.com> in the Manuals/Hardware folder of the Downloads section.

If you are using an iOS or Android device, you will need to download and install the MobileAsset app available from the App Store or the Google Play store.

9. Setup your mobile devices following the instructions in the Working with Mobile Devices chapter.

Windows Mobile Device - [Downloading and Installing MobileAsset on Windows Mobile/CE](#)

Android - [Downloading and Installing the MobileAsset App](#)

iOS - [Downloading and Installing MobileAsset on your iOS Device](#)

10. You are now ready to perform Asset transactions on your PC and on your mobile devices!

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Chapter 2: PC Operation

2.1 Logging onto the System

The **Log On** screen allows you to access the software. This screen appears when the application is opened.

The following information is discussed in this topic:

[Log On Screen Example](#)

[Activating Your Software](#)

[Using the Sample Company](#)

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

2.1.1 Log On Screen Example

Below is an example of the **Log On** screen:



The **User Name** field is not case sensitive. The **Password** field is case sensitive. Asterisks will be displayed as you type the **Password**. Both fields are required.

On first use, MobileAsset starts with the following defaults:

User Name: admin

Password: (blank)

After log on, the password should be changed. [Click here for more information on changing passwords.](#)

2.1.2 Activating Your Software

If an Activation Key has not yet been supplied (the application is running in Demo mode) a message will appear on the **Log On** screen notifying you of the cut off date for product registration as shown in the example below:



The date and time displayed will be 30 days beyond the date and time of installation, after which MobileAsset will cease to function if an Activation Key has not yet been supplied to activate the product. [For more information on updating your license with an Activation Key, click here.](#) If you would like to extend the trial period beyond thirty days, please contact the Sales department at sales@waspbarcode.com.

If the demo period expires before you activate the software, the following screen will appear when you attempt to open MobileAsset:



You will need to enter the **Activation Key** in the field provided, then click the **OK** button. You can also register your software from this screen by clicking the **Register** button.

2.1.3 Using the Sample Company

If you want to log in using the **Sample Company**, select the **Use Sample Company** checkbox, then click the **OK** 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](#).

2.1.4 Logging on with Multiple Databases

Enterprise version only. If you have created multiple databases for use with two or more companies, you will see the [Select Company screen](#) after logging on. You will only see this screen if you have access to more than one database.

2.2 Navigating the Main Screen

The **Main** screen allows you to quickly access all parts of the system using the icons and menus.

Note: All screen shots in this Help file are of the Professional version of MobileAsset. Not all features/tabs shown in these screens are available in the Standard version of MobileAsset. For information on the benefits of upgrading your software, please click on **Help>Benefits of Upgrading** from the Dashboard menu section.

Below is an example of the **Main** screen as it appears the first time it is accessed:

The screenshot shows the MobileAsset Main screen. The title bar at the top displays 'MobileAsset -' and includes standard window controls. Below the title bar is a menu bar with 'File', 'Dashboard', 'Help', and 'Alerts'. A search box on the right prompts the user to 'Enter asset tag to search:'. The main area is divided into several sections:

- Left Navigation Menu:** Contains icons and labels for 'Asset Management', 'List Forms', 'Administration', 'Labels', 'Reports', 'Mobility', and 'New'.
- Central Dashboard:** Features a 'Click the Pin Button to pin/unpin this area' instruction, a 'Top 10 Asset Values' bar chart, a 'Funding Overview' bar chart, and an 'End of Life' table.
- Bottom Status Bar:** Shows 'Asset Management', 'Admin', and '<All>'.

A tooltip is overlaid on the 'End of Life' table, stating: 'Click here or go to Dashboard menu to add/remove widgets.'

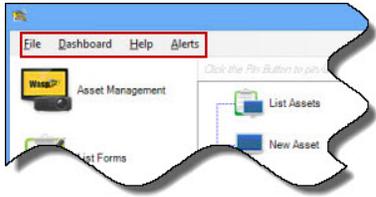
Asset Tag	Asset Value
CF009575	
CF1990	
PC000402	
PC000403	Loaner/Rental TS \$70.00
PC000404	Loaner/Rental OS \$70.00
PS0197956_	DS200 \$70.00
PS0198065_	113 global #6 \$150.00
sz1200	Loaner/Rental Flashcard \$150.00
sz1201	Loaner/Rental PEB \$150.00
sz1202	Loaner/Rental Flashcard \$10.00

The screen is divided in to five sections:

1. The **Title Bar** appears at the top of the screen. This bar displays the software name and, if you are using multiple databases, which database you currently have open. If you only have one database, the **Title Bar** will appear as follows:



2. The next section is the **Menu** section and contains the **File**, **Dashboard**, **Help** and **Alerts** menus.

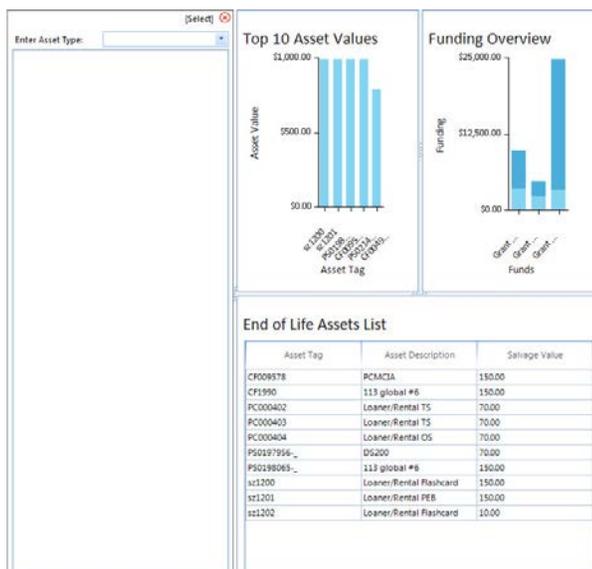


The **File** menu contains the following options:

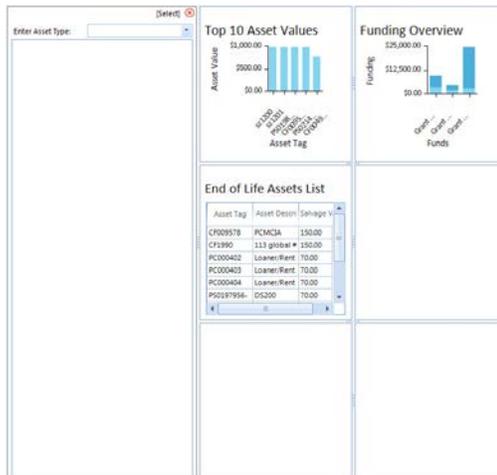
- [Logout](#) - Logs the current user out of MobileAsset and opens the [Login](#) screen so someone else can log in.
- [Change Password](#) - Allows the current user to change his/her password.
- [Setup Label Printer](#) - Opens the **Select Label Printer** screen allowing you to choose the default printer.
- [Reset All Forms Settings](#) - Used to reset all forms (screens) to their default settings, including sizing, positioning, etc. This is especially useful to correct display problems when MobileAsset has been opened on a single monitor following use on dual monitors.
- [Reset All Grid Settings](#) - Used to reset all grids (lists) to their default settings. Any formatting such as column arrangement, filters, hidden columns, etc. will be replaced with the default settings.
- **Exit** - Closes MobileAsset.

The **Dashboard** menu allows you to customize what information appears on your **Main** screen. This menu contains options for you to add "widgets" containing charts and graphs of your asset data for display on your dashboard. This data will be updated each time you open MobileAsset or when you click **Refresh Charts**. The **Dashboard** menu contains the following options:

- **Show Dashboard** - Click this option to display the dashboard widgets (this is displayed by default).
- **Hide Dashboard** - Click this option to hide the dashboard widgets.
- **Refresh Charts** - Refreshes the data contained in any widgets you have set up.
- **Use 4 Widget Configuration** - This option sets the dashboard to display 4 widgets (Note: you can select what data each widget displays).



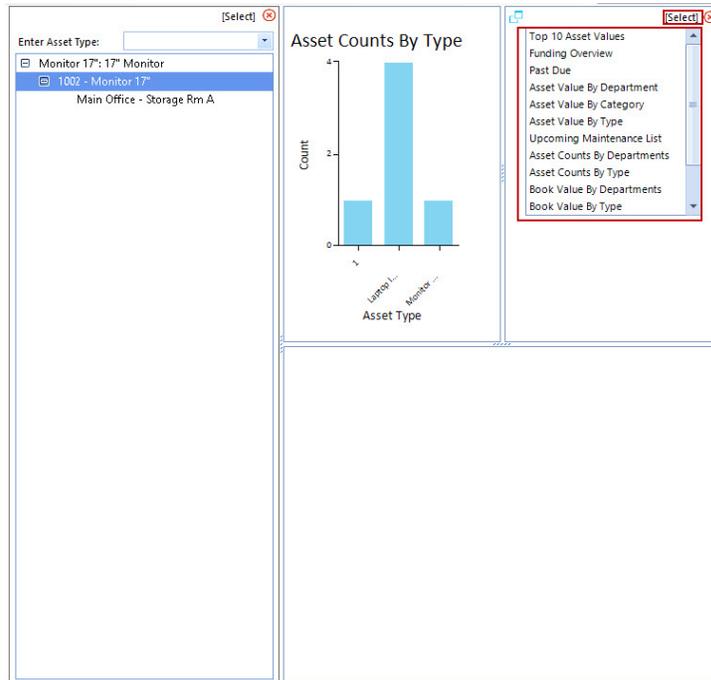
- **Use 7 Widget Configuration** - This option sets the dashboard to display 7 widgets (Note: you can select what data each widget displays).



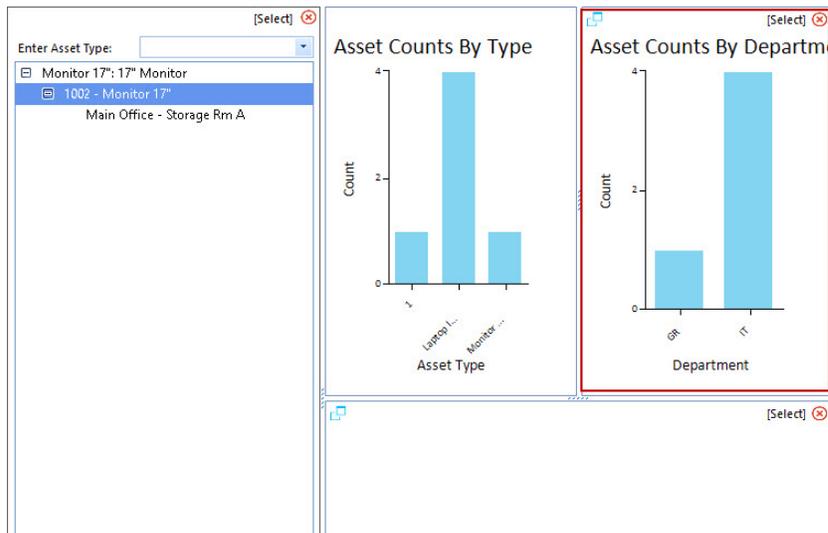
- **Show widget (Left Column)** - Displays the widget the Left Column widget. By clicking [Select] you can set this widget to **Lookup by Asset Type** or **Lookup by Site**.
- **Show widget (Middle Column Row 1)** - Displays the middle column, row 1 widget.
- **Show widget (Middle Column Row 2)** - Displays the middle column, row 2 widget.
- **Show widget (Middle Column Row 3)** - Displays the middle column, row 3 widget.
- **Show widget (Right Column Row 1)** - Displays the right column, row 1 widget.
- **Show widget (Right Column Row 2)** - Displays the right column, row 2 widget.
- **Show widget (Right Column Row 3)** - Displays the right column, row 3 widget.

To setup a widget:

- From the **Dashboard** menu, select which widget you want to create, or select the Use 4 or Use 7 widget option. The new widget will appear in the Navigation window. In the example shown below we have selected to use the 4 widget configuration. Note that we have already set up the data in the Left column and the Middle Column Row 1 widgets.
- Click on the widget to which you want to add data.. The Red X (close) button and the [Select] option appears.
- Click [Select]. A menu containing your options for that widget appears:



d. Select from the list of data options. Here we have selected **Asset Counts by Departments**.

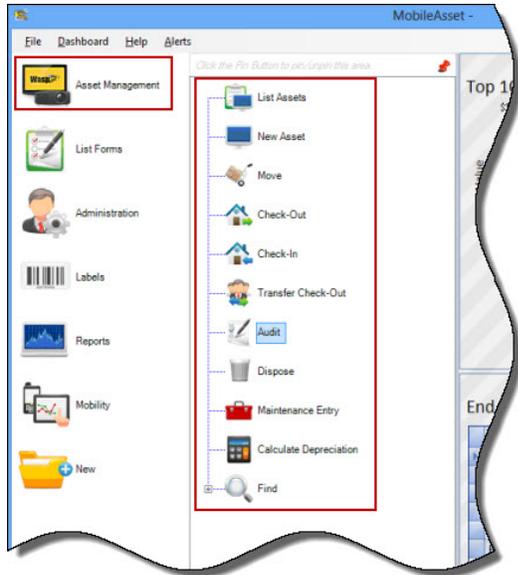


The **Help** menu contains the following options:

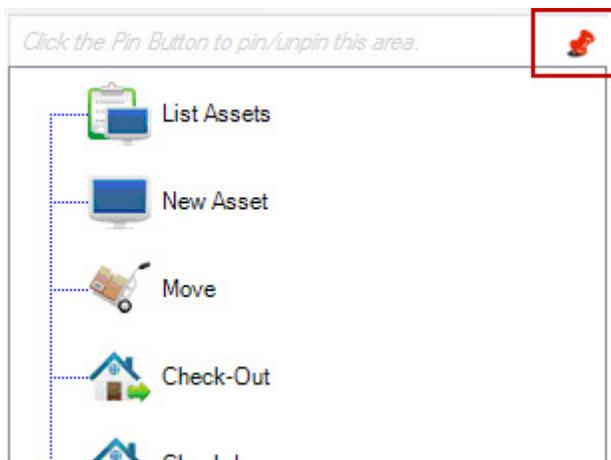
- **Contents** - Opens this help file with the **Contents** tab displayed.
- **Index** - Opens this help file with the **Index** tab displayed.
- **Search** - Opens this help file with the **Search** tab displayed.
- **Training Options** - Opens the training page of waspbarcode.com. This page lists available hardware and software training.
- **Check for Updates** - Use this option to manually check for updates to your software. By default, the software will check for updates to the application and notify you if a more recent version is available. You can then access the software updates website and download the latest version. This ensures

you are always working with the most up-to-date version available to you. **This feature is turned on by default.** You can turn off the automatic check and perform periodic manual checks, or leave the option on and perform a manual check using this option, if desired.

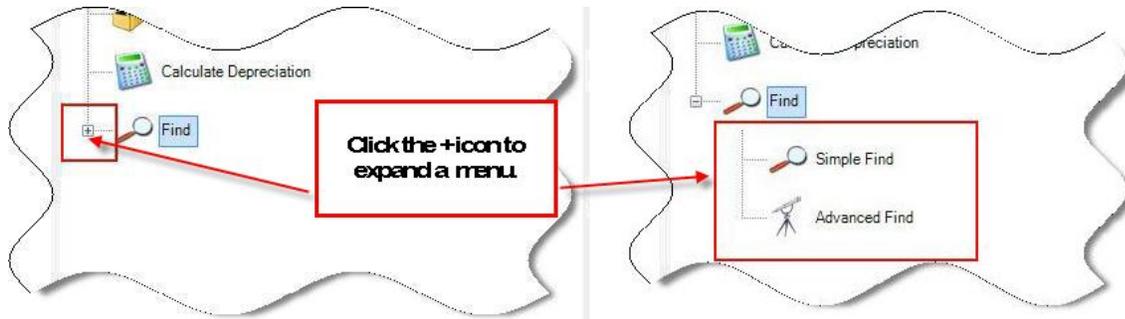
- [About](#) - Opens the **About** screen allowing you to view basic version and license information, view your mobile device license(s) and view and print the EULA (End User License Agreement).
3. [Alerts](#) displays any overdue checked-out assets, contracts/licenses that have expired and/or maintenance that is due. Alerts are not available in the Standard version of MobileAsset.
 4. The **Dashboard** displays icons you can use to access various parts of the software. When you first open MobileAsset, the Dashboard will be blank. To open a menu, click on the icon on the left. For example, if the **Asset Management** icon is clicked, the **Asset Management** menu will appear, as shown below:



You can pin the menu so that it always appears visible in the Dashboard by clicking the **Pin** icon in the upper, right corner of the menu. Unpinned menus will have a Green pin icon. Pinned menus will have a Red pin icon, as shown below:



If a plus (+) sign precedes an icon on the right side of the screen, click on the icon to reveal additional options.



When the menu items are displayed, a minus (-) sign will precede the menu. Click the icon to hide the menu options.

- 5. The **Search** bar allows you to enter a full or partial asset tag by which to search the database.



To search, enter a full or partial asset tag and press the **<ENTER>** key. Click the down arrow to the right of the search field to view a list of recent searches. If a matching asset tag is found, the **Edit Asset** screen will appear. If there are several matches, the **Asset List** will appear with the matching tags displayed.

- 6. The **Status Bar** at the bottom of the screen displays the menu you currently have open, the login of the user currently logged in and the Site to which the user has access.



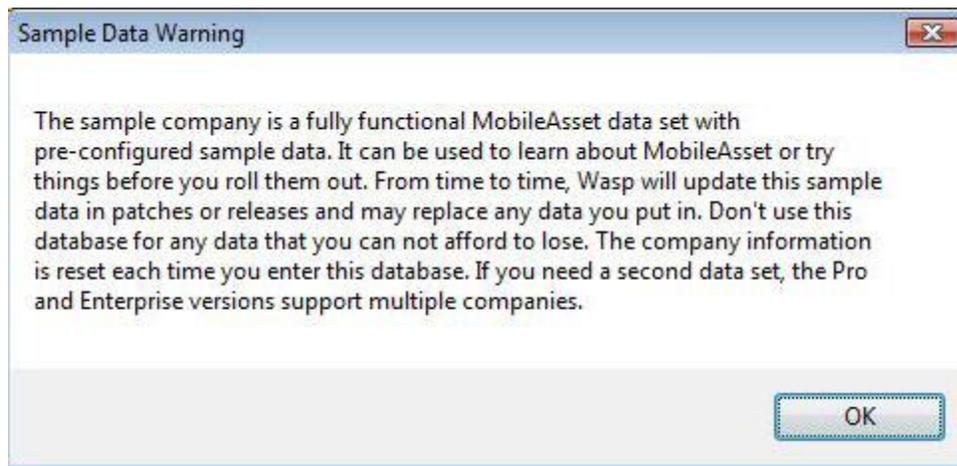
2.3 Using the Sample Company

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

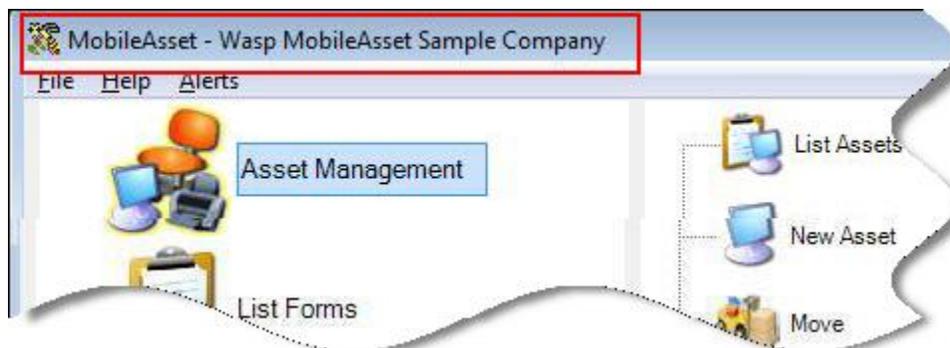
You can enter information into the **Sample Company**; however, when upgrading to a new version, this data will be lost. It is very important that you do not enter any information into the **Sample Company** that you do not want to lose. The **Sample Company** is meant for training purposes only and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

Accessing the Sample Company:

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



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** screen will display Wasp MobileAsset Trial Company in the title bar. On reports, the company name and each address line will be followed by "trial".



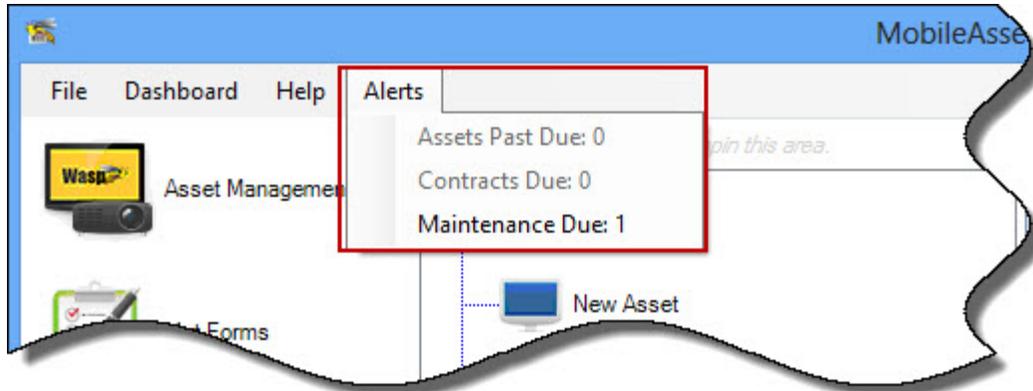
2.4 Working with Alerts

Alerts are not available in the Standard edition of MobileAsset.

MobileAsset will alert you if there are overdue checked-out assets, contracts/licenses that have expired and/or maintenance that is past due.

You can quickly check if any of these items are past due by following the instructions below:

1. From the **Main** screen, click **Alerts**. A drop down list will notify you of any overdue items as shown below:



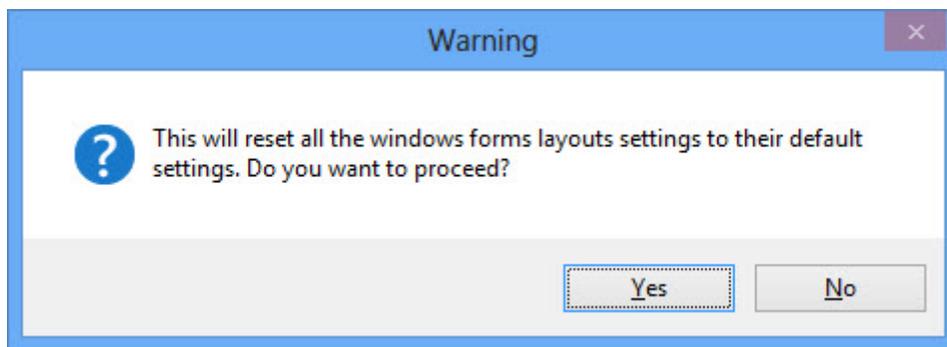
2. Click on a listing to be taken to a list of the items that are past due. For example, to see what asset is checked-out and past due, click **Assets Past Due**. The **Asset List** will appear displaying the overdue asset. You can then follow up as needed to make sure the asset is not lost, etc.

2.5 Using Dual Monitors with MobileAsset

You can use a single monitor or dual monitors with MobileAsset. Using dual monitors allows you to view multiple MobileAsset screens at the same time. If you switch back and forth between single and dual, you may find that you have problems viewing some screens. For example, if you open the Asset List screen (or any list screen) you will notice that you cannot select anything on the Main screen as long as the List screen is open. If you open the Asset List while using dual monitors and move the screen so that it displays on the second monitor, the software will remember the position of the screen so that the next time you open it, it will reopen on the second monitor. This prevents you from having to reposition the screen everytime you access it. If, however, you reopen MobileAsset on a single monitor and you are unable to view the entire screen, or it appears that some screens are displaying off the viewable screen area, you will need to reset all form settings in MobileAsset, meaning you will erase MobileAsset's memory of previous screen positions.

To Reset Form Positions:

1. From the **Main** screen click **File > Reset All Form Settings**. The following question will appear:



2. Click **Yes** to reset all screens to their default positions.

2.6 Logging Out of the System

You can logout of MobileAsset by clicking **File > Logout**. The **Log On** screen appears allowing you to login again or login as a different user. Click **Cancel** on the Log On screen to close MobileAsset.

2.7 Adding New Information

2.7.1 Create New Asset

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

Note: Most screenshots in this Help file are of the Professional version of MobileAsset. Not all features/tabs shown in these screens are available in the Standard version of MobileAsset.

Note for Mobile Device Users: Assets can also be added on a [Windows Mobile/CE](#), [iOS](#) (Professional and Enterprise Only) or [Android](#) (Professional and Enterprise Only) mobile device.

The following topics are discussed in this section:

[Accessing the New Asset Screen](#)

[General Tab](#)

[Asset Linking Tab](#)

[Depreciation Tab](#)

[Picture Tab](#)

[Attachments Tab](#)

[Maintenance Tab](#)

[Contracts Tab](#) - Professional and Enterprise Editions Only

[Funding Tab](#) - Professional and Enterprise Editions Only

[Transaction History Tab](#)

[Custom Fields Tab](#)

[Dynamic Custom Fields](#)

Accessing the New Asset Screen

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

This feature can also be accessed from the **Asset List** by clicking the **New** button on the toolbar. [For more information on using the list screens, click here.](#)

The **New Asset** screen is broken into several tabs. Use the following links to jump ahead to the tab of interest:

[General](#), [Asset Linking](#) (Professional and Enterprise Editions), [Depreciation](#), [Attachments](#), [Picture](#), [Maintenance](#), [Contracts](#) (Professional and Enterprise Editions), [Funding](#) (Professional and Enterprise Editions), [Transaction History](#), [Custom Fields](#), [Dynamic Custom Fields](#)

New Asset Screen > General Tab

The screenshot shows the 'New Asset' window with the 'General' tab selected. The 'Asset Tag' field is empty. The 'Asset Description' field is empty. The 'Site' field is a dropdown menu. The 'Location' field is a dropdown menu. The 'Department Code' field is a dropdown menu. The 'Serial No.' field is a text input. The 'Condition' field is a dropdown menu. The 'Hyperlink' field is a text input with a pushpin icon. The 'Additional Info' field is a text area. The 'Asset Type' field is a dropdown menu. The 'Asset Type Description' field is a text input. The 'Manufacturer' field is a dropdown menu. The 'Model' field is a text input. The 'Vendor Number' field is a dropdown menu. The 'Check Out Length' field is a spinner with '0 days', '0 hrs', and '0 min' options, and a 'No Due Date' checkbox. The 'Check Out Lead Time' field is a spinner with '0 days', '0 hrs', and '0 min' options. The 'Reminder Lead Time' field is a spinner with '0 days', '0 hrs', and '0 min' options, and a 'No Reminder' checkbox. The 'Depreciation Class' field is a text input. The 'Category' field is a text input. At the bottom, there is a 'Pin All' icon, a 'Print Tag On Save - Copies:' field with '0' and a pushpin icon, and 'Save' and 'Close' buttons.

Note: If the [Automatic Asset Tags](#) function is turned on (**Administration > Options**), the **Asset Tag** field will appear as follows:

The screenshot shows the 'New Asset' window with the 'General' tab selected. The 'Asset Tag' field contains the text 'Automatically assigned' and has a pushpin icon to its right. The 'Asset Description' field is empty. The 'Site' field is a dropdown menu. The 'Location' field is a dropdown menu. The 'Department Code' field is a dropdown menu. The 'Serial No.' field is a text input. The 'Condition' field is a dropdown menu. The 'Hyperlink' field is a text input with a pushpin icon. The 'Additional Info' field is a text area. The 'Asset Type' field is a dropdown menu. The 'Asset Type Description' field is a text input. The 'Manufacturer' field is a dropdown menu. The 'Model' field is a text input. The 'Vendor Number' field is a dropdown menu. The 'Check Out Length' field is a spinner with '0 days', '0 hrs', and '0 min' options, and a 'No Due Date' checkbox. The 'Check Out Lead Time' field is a spinner with '0 days', '0 hrs', and '0 min' options. The 'Reminder Lead Time' field is a spinner with '0 days', '0 hrs', and '0 min' options, and a 'No Reminder' checkbox. The 'Depreciation Class' field is a text input. The 'Category' field is a text input. At the bottom, there is a 'Pin All' icon, a 'Print Tag On Save - Copies:' field with '0' and a pushpin icon, and 'Save' and 'Close' buttons.

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. Fields are **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.

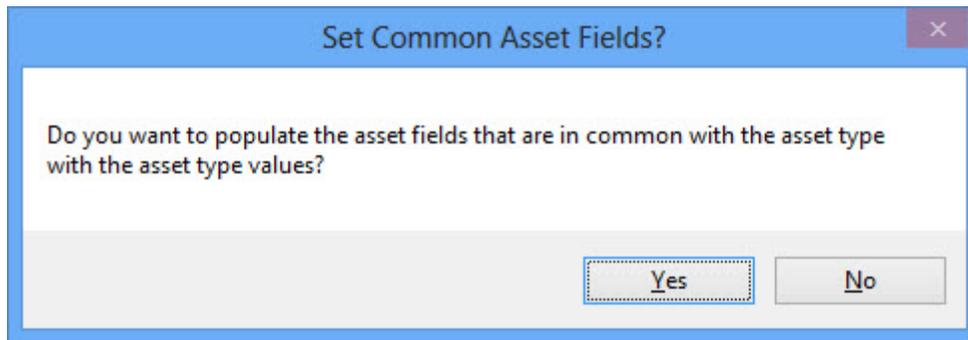
Click the **Pin All** icon to pin every field that offers the pinning feature. Click it again to undo pinning for all fields.

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

Note: If you are using [Automatic Asset Tags](#), you do not need to enter anything in the **Asset Tag** field. The tag will be generated when you click the **Save** button or when you click the button next to the **Asset Tag** field.

If you have enabled the [Edit Inherited Asset Type Data](#) option on the **Options** screen, the message screen below will appear when you select the Asset Type and you can make changes to the information that is populated from the **Asset Type**. These fields include the [Manufacturer, Model, Vendor Number, Check Out Length, Check Out Lead Time and Reminder Lead Time](#). Any changes made to these fields apply to the current asset only. (If this option is not enabled, these fields will be disabled and you will not be able to make changes.)



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

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. You can set the asset to have no due date by leaving the values in the **Check Out Length** fields at 0.

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

- 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.

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

New Asset Screen > Asset Linking Tab

Asset Linking is only available in the Professional and Enterprise editions of MobileAsset. Asset Linking 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 software interface. At the top, there are several tabs: General, Asset Linking (selected), Depreciation, Picture, Attachments, Maintenance, Contracts, Funding, Transaction History, Custom Fields, and Dynamic Custom Fields. Below the tabs, there is a checkbox labeled 'Transact as Whole - Select this checkbox to indicate that this asset and all of its child assets should be audited/checked-out/checked-in etc., as a group.' which is checked. Below this, there is a 'Parent Asset:' label followed by a dropdown menu and a red minus sign. Below that is a 'Child Asset(s):' label followed by a large empty rectangular area. At the bottom right of the form, there are two buttons: 'Link' and 'Unlink'.

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.

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:

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

Transact as Whole - Select this checkbox to indicate that this asset and all of its child assets should be audited/checked-out/checked-in etc.. as a group.

Parent Asset:
 1002

Child Asset(s):
 --- 1 - Example Asset Tag

Link Unlink

In this example, Asset 1002 is the parent of the current asset and asset 1 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 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 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.

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 software 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.

4. You can unlink child assets by highlighting the asset in the **Child Assets** list and clicking the **Unlink** button.
5. Click **Save** if you are done entering information for this asset or click another tab to proceed with entering more information.

New Asset Screen > 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 screenshot shows the 'Depreciation' tab of the 'New Asset Screen'. The 'Depreciate Asset' checkbox is unchecked, and a message indicates that assets of this type cannot be depreciated. The form includes the following fields and values:

- Depreciate Asset:** (disabled)
- Purchase Order:** [Empty text box]
- Purchase Date:** [Empty date picker]
- Purchase Cost:** 0.00
- Salvage Value:** 0.00
- Depreciation Begin Date:** [Empty date picker]
- Last Depreciation Date:** [Empty date picker]
- Total Depreciation:** 0.00
- Current Depreciation:** 0.00
- Book Value:** 0.00

The **Class Info** box displays:

- Class:** [Empty text box]
- Depreciation Method:** 0
- Life:** 0 year(s) 0 month(s)

1. The **Asset Tag** value entered on the **General** tab will be displayed at the top, but can still be edited, if desired.
2. Click the **Depreciate Asset** check box if you want the software to calculate depreciation. The **Depreciate Asset** check box 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".

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.](#)

A **Purchase Cost** should also be entered here if you plan to use the [Funding](#) feature to track this asset. You will need the purchase cost here in order to record this debit from the funding source.

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.

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

New Asset Screen > 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, click on the picture area to add a picture.

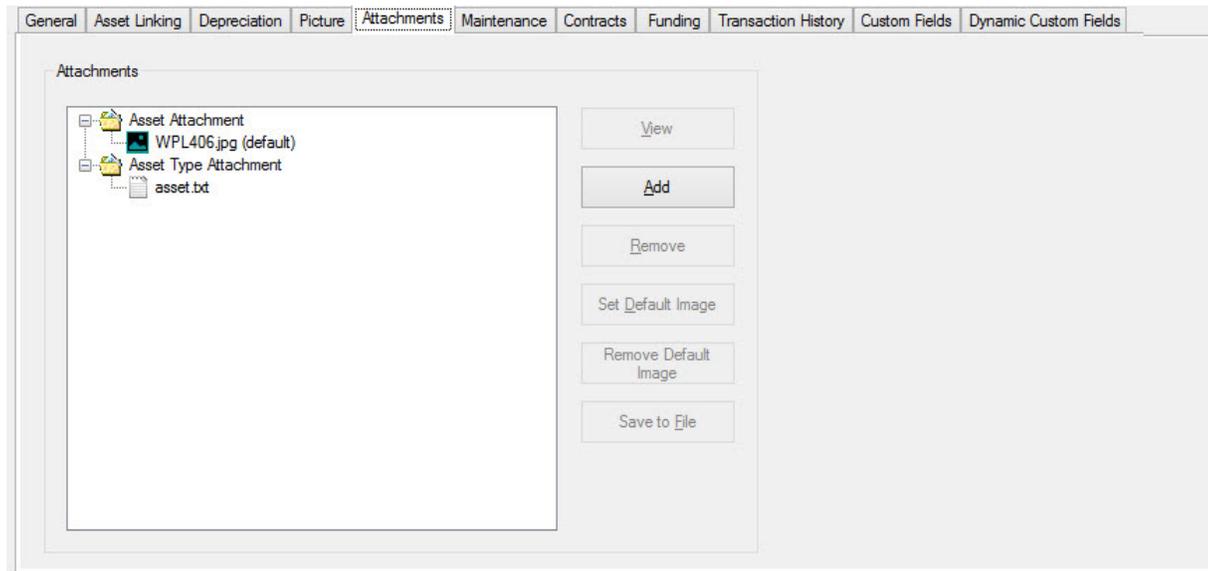
The current default picture is always displayed on the **Picture** tab. Right click the image to see the popup **Picture** menu. This menu allows you to **Add** (a new) **Image** or to **Select** (a previously added) **Image**. Any image you select for display will become the new default image.

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 **Save** 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 Screen > Attachments Tab

To attach an image or other documentation to this asset, 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 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 MobileAsset'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 Create New Asset Type for further information](#)).

4. Attachments are not actually added to the database until the **Save** 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 Screen > 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:

The screenshot shows the 'Maintenance' tab selected in the software interface. The 'Warranty' section is active, displaying input fields for 'Begin:', 'End:', and 'Provider:'. Below these fields is a large empty text area. At the bottom of the tab are buttons for 'New', 'Edit', 'Delete', and 'Show History'.

Entering Warranty Information

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

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

The screenshot shows the 'Warranty' section with the 'Begin' field set to '11/ 7/2009'. A calendar for November 2009 is displayed, with the date '7' highlighted. Red arrows point to the left and right navigation arrows of the calendar. A text box with a black border contains the instruction: "Click on the arrows to scroll through the months".

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Today: 11/7/2009

You can also click on the Month/Year to view a list of all months. You can then click on a month to quickly switch dates:

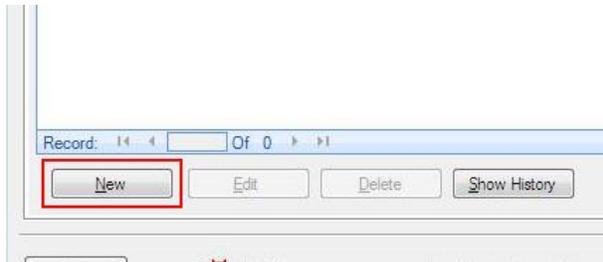


2. You can optionally enter the warranty provider in the **Provider** field.

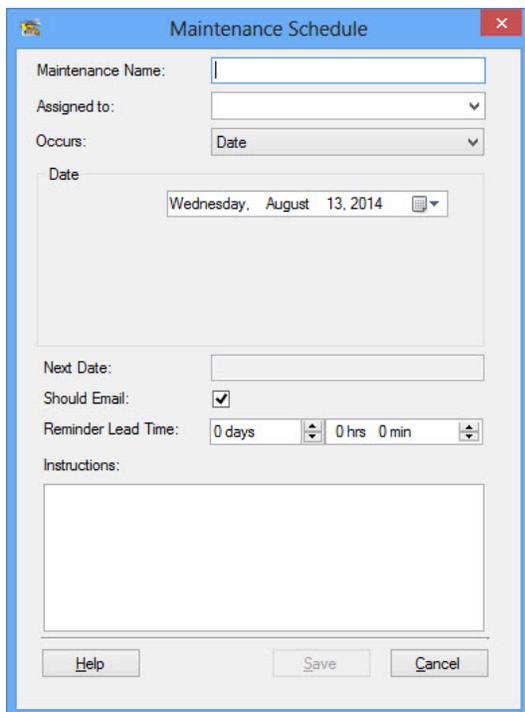
Entering New Maintenance Schedules

To enter a new maintenance schedule

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



The **Maintenance Schedule** screen appears:



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 entered into the MobileAsset database 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.

Occurs: Date

Date: Monday, August 24, 2009

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.

- **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).

Occurs: Daily

Daily

Maint Start: Monday, August 24, 2009

Every 10 day(s)

Next Date: Monday, August 24, 2009

In this example, maintenance would be performed every 10 days beginning Monday, August 24, 2009.

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 or 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.

Occurs: Weekly

Weekly

Maint Start: Monday, August 24, 2009

Every 1 week(s) on:

Sun Mon Tue Wed

Thu Fri Sat

Next Date: Friday, August 28, 2009

In this example, maintenance will be performed every week on Fridays beginning the week of Monday, August 24, 2009.

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, August 28, 2009.

- **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:

The screenshot shows a configuration window for a maintenance schedule. At the top, 'Occurs:' is set to 'Monthly'. Below this, the 'Monthly' section is expanded. 'Maint Start:' is set to 'Monday, August 24, 2009'. There are two radio button options for frequency: 'Day' (selected) and an empty dropdown. The 'Day' option is set to '1' and 'of every 1 month(s)'. The 'Next Date:' at the bottom is 'Tuesday, September 01, 2009'.

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

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:

The screenshot shows a configuration window for a maintenance schedule. At the top, 'Occurs:' is set to 'Monthly'. Below this, the 'Monthly' section is expanded. 'Maint Start:' is set to 'Monday, August 24, 2009'. There are two radio button options for frequency: 'Day' (unselected) and '1st' (selected). The '1st' option is set to 'Thursday' and 'of every 1 month(s)'. The 'Next Date:' at the bottom is 'Thursday, September 03, 2009'.

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. Select **Should Email** if you want an email reminder sent when the next maintenance date is due. The email will be sent to the recipients indicated on the Options screen. For more information on setting these options, please refer to the topic [Reminder Alert Options](#).

- if you select the **Should Email** checkbox, enter the number of days and/or hours/mins prior to the due date you want the email to be sent in the Reminder Lead Time fields.
- Enter any special instructions in the **Instructions** text field.
- Click **Save** when you are done entering information for this maintenance schedule. The schedule will appear in the list on the **Maintenance** tab:

Description	Occurs	Next Date	Assigned to
Battery Replacement	Monthly	4/1/2014	

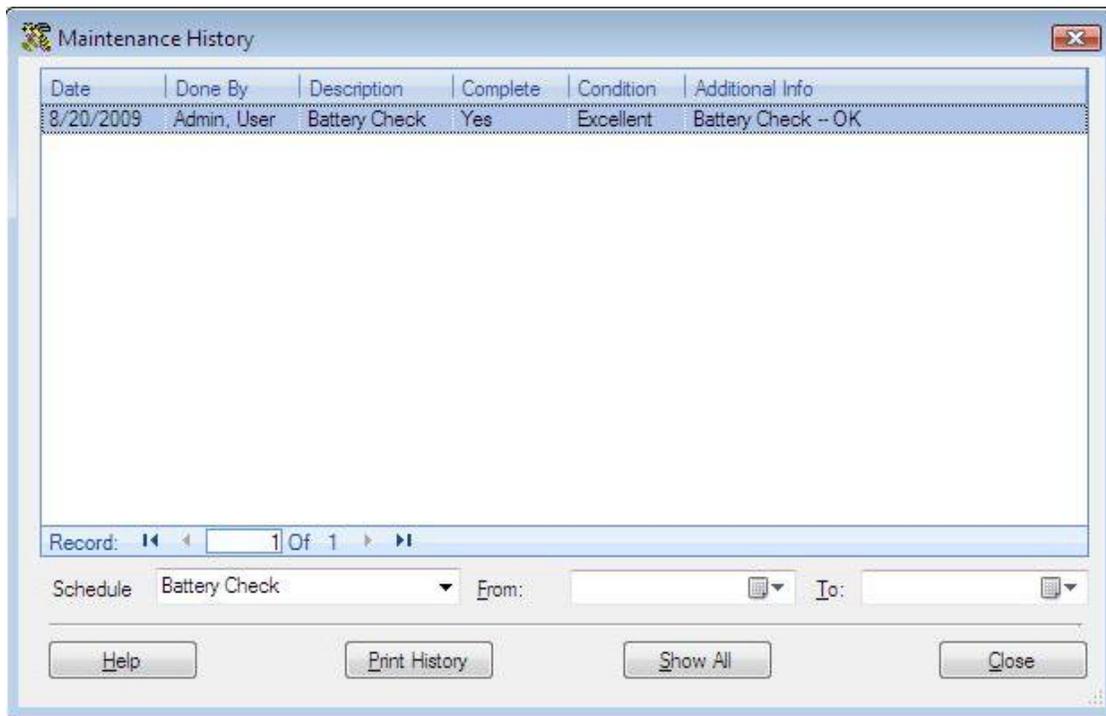
Editing Existing Maintenance Schedules

- 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.
- 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.

- Click the **View History** button. The **Maintenance History** screen will appear:



- 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.

Click the **Show All** button to remove the filter.

Select the **Print History** button to print a list of the displayed maintenance entries.

New Asset Screen > Contracts Tab

The **Contracts** tab is only available in the Professional and Enterprise editions of MobileAsset. 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](#).

Select from the full contract list

Select All Clear All Add Remove

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(s) will appear on the **Contracts** tab as shown in the example below:

New Asset

Asset

Asset Tag: Asset Description:

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

Select from the full contract list

Contract Number	Description	Internal Contact	Vendor Number	Begin Date	End Date	Licenses	No End Date	Software	C
45778DFE	A Software License	Jane Doe	478	4/8/2014 12:00:00 AM	4/8/2015 12:00:00 AM	1	F	T	1

Select All Clear All Add Remove

Help Pin All Print Tag On Save - Copies: 0 Save Close

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 **Save** if you are done entering information for this asset or click the next tab to proceed with entering more information

New Asset Screen - Funding

The **Funding** tab is only available in the Professional and Enterprise editions of MobileAsset. The **Funding** tab allows you to keep track of any grants or funding sources for your assets. Below is an example of the **Funding** tab:

To associate a funding source with this asset:

1. Click the **Add** button at the bottom of the tab. The **Funding List** appears.
2. Highlight the desired funding source, then click the **Select** button to add it to this asset. **Note:** You can also create a new funding source from the **Funding List** by clicking the **New** button.

The selected funding source will appear on the **Funding** tab.

Debited from Fu...	Name	Description	Amount	Start Date	End Date	Available Funds	Asset Count
0.00	CMS2014 Doll F...	2014 Funds Distr...	10000.00	4/1/2014	5/1/2014	10000.00	0

3. The **Debited from Fund** field in the list is editable. You can click on this field to enter the amount of funds used. The **Available Funds** column will update by subtracting the debited amount. Please note that the amount entered here must be less than the **Purchase Cost** entered on the [New/Edit Asset screen > Depreciation](#) tab.

New Asset Screen > 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 **Save** button is clicked.

New Asset Screen > Dynamic Custom Fields

Dynamic Custom Fields are customized text, date and/or number fields that you create on Asset Types. The field(s) will appear on the Dynamic Custom Field tab of any assets that are assigned to that asset type. These fields differ from regular custom fields in that you can set them to be associated with a specific asset type, multiple asset types that you select or on all asset types. You can also create a tooltip for each field to provide users with information on what data should be entered. Dynamic Custom Fields can be searched via the [Search](#) screens or the [Search field on the Main screen](#). In addition, Dynamic Custom Fields can be edited via the [Mass Update](#) function.

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

2.7.2 Create New Customer

The **Create New Customer** screen, 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** screen click **New > Customer**. The **New Customer** screen appears.

Create New Customer can also be accessed from the **Customer List** by clicking the **New** 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.

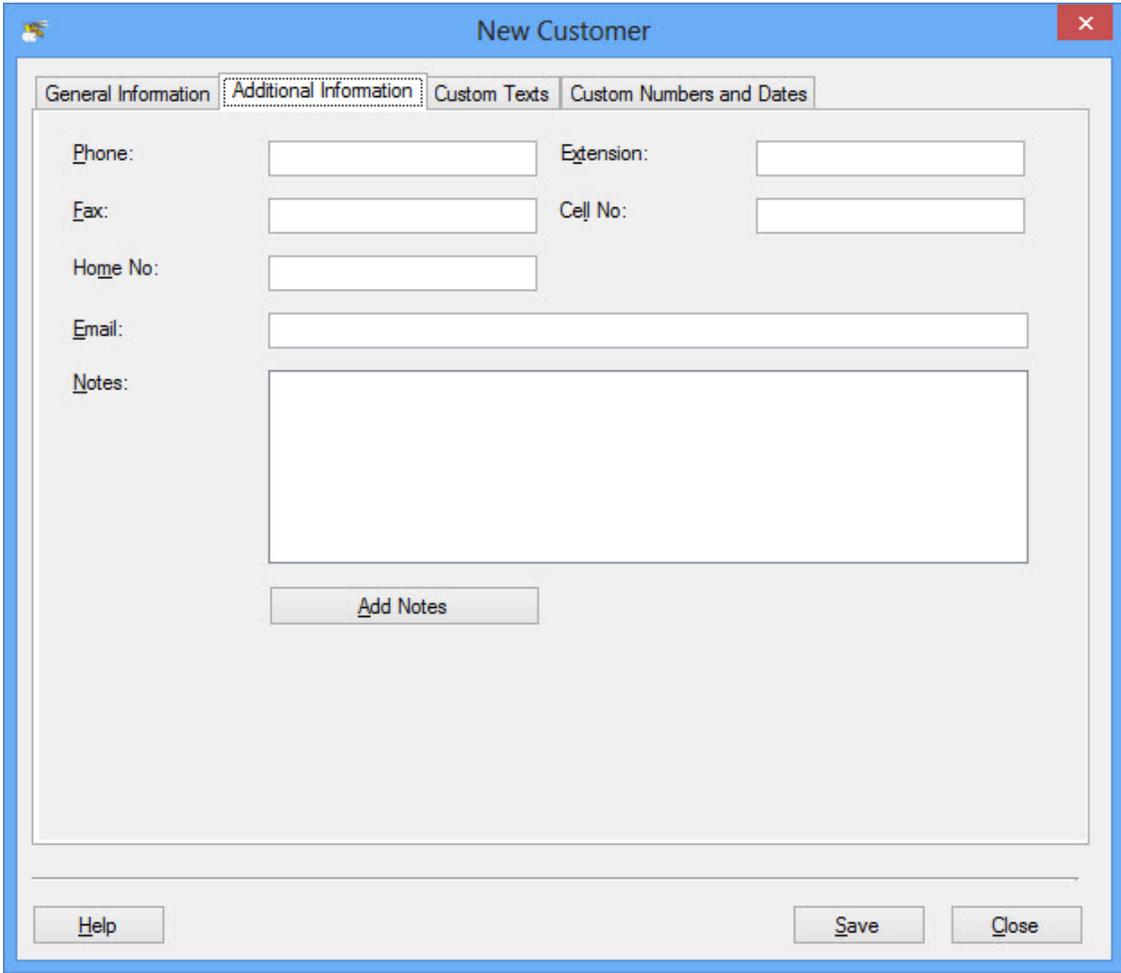
Below is an example of the **New Customer** screen.

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 window titled "New Customer" with a red close button in the top right corner. The window contains four tabs: "General Information", "Additional Information" (which is selected and highlighted with a dashed border), "Custom Texts", and "Custom Numbers and Dates". The "Additional Information" tab contains the following fields:

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

Below the Notes field is a button labeled "Add Notes". At the bottom of the window, there are three buttons: "Help", "Save", and "Close".

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

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.

2.7.3 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.

Note: Most screen shots in this Help file are of the Professional edition of MobileAsset. Not all features/tabs shown in these screens are available in the Standard version of MobileAsset. For information on the benefits of upgrading your software, please click on **Help>Benefits of Upgrading**.

The following topics are discussed in this section:

[Accessing the New Asset Type Screen](#)

[General Tab](#)

[Attachments Tab](#)

[Picture Tab](#)

[Custom Fields Tab](#)

[Dynamic Custom Fields Tab](#)

Accessing the New Asset Type Screen

1. To access the screen, from the **Main** screen, 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. You can use the following links to jump to the tab of interest:

[General](#), [Attachments](#), [Picture](#), [Custom Fields](#), [Dynamic Custom Fields](#).

New Asset Type Screen > General Tab

To create a new Asset Type, supply the required **Asset Type** value. 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.

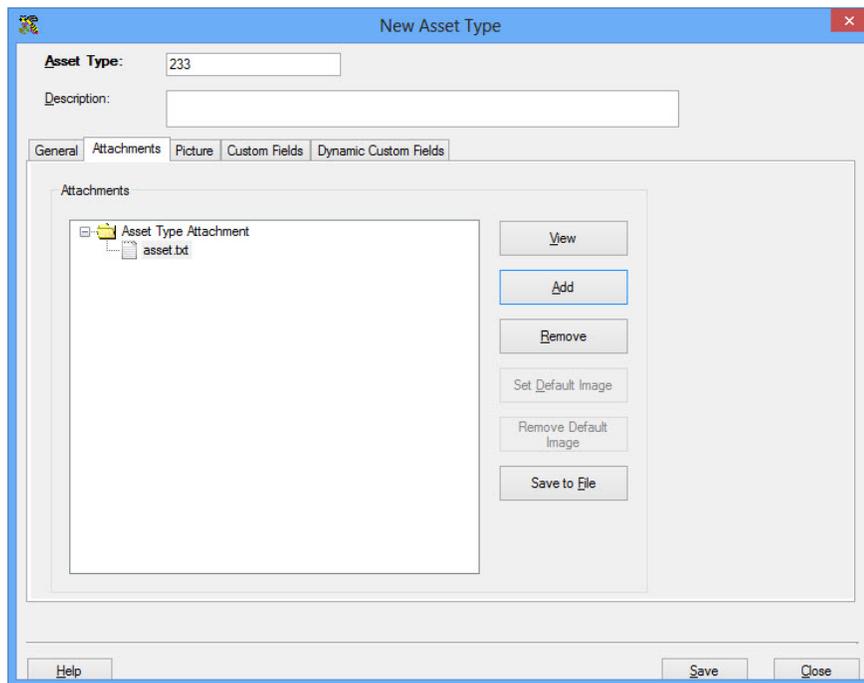
- Select a **Manufacturer** from the drop down list or create a new one by entering the new value and clicking **OK** to launch the [Create New Manufacturer](#) screen.
- Enter a **Model** name or number for the Asset Type.
- Select a **Vendor Code** from the drop down list or create a new one by entering 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 Asset Class](#) screen.
- Select a **Category** from the drop down list or create a new one by entering the new value.
- **Length** is the length of one unit of measure.
Width is the width of one unit of measure.
Height is the height of one unit of measure.
Weight is the mass of one unit of measure.

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.)

- **Check Out 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. Leave the values in this section at 0 to have no due date for this asset type.
- **Check Out 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.
- **Reminder Lead Time** indicates how long before an asset is due that a reminder e-mail will be sent to the customer/employee to whom it is checked out.
- 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 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.

- 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 used 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.

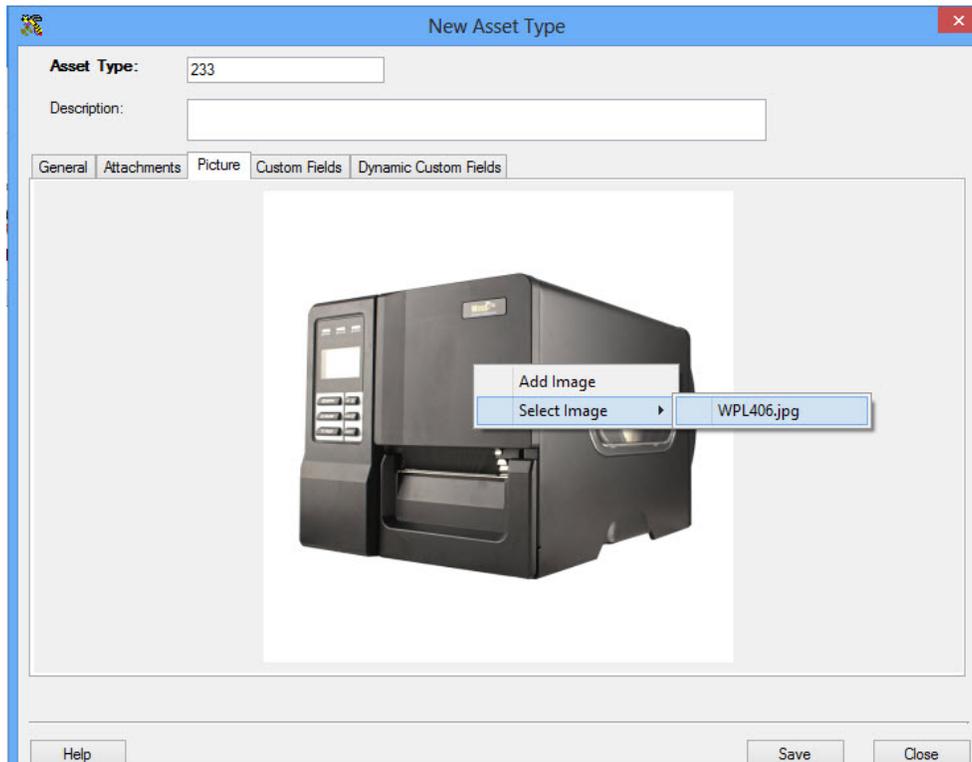
The **Save to File** button copies the selected attachment from the database to any drive and folder available on your system.

To remove an attachment, highlight it in the list and click the **Remove** button.

- 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.



- 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.

- 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.

New Asset Type Screen > Custom Fields Tab

The **Custom Fields** tab allows users with Admin rights to create custom text, number or number fields for this asset type.

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

New Asset Type Screen > Dynamic Custom Fields

Dynamic Custom Fields are customized text, date and/or number fields that you create on Asset Types. The field(s) will appear on the Dynamic Custom Field tab of any assets that are assigned to that asset type. These fields differ from regular custom fields in that you can set them to be associated with a specific asset type, multiple asset types that you select or on all asset types. You can also create a tooltip for each field to provide users with information on what data should be entered. Dynamic Custom Fields can be searched via the [Search](#) screens or the [Search field on the Main screen](#). In addition, Dynamic Custom Fields can be edited via the [Mass Update](#) function.

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

2.7.4 Create New Contract/License

The **Contracts/Licenses** feature is available in the Professional and Enterprise editions of MobileAsset.

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** screen, click **New > Contract/License**.

The **New Contract** screen can also be accessed from the **Contract 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 requested information at the top of the screen.

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** screen 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:

Asset Tag	Asset Type	Asset Type Description	Site	Location
4001	Laptop IBMThinkPad		Main Office	Storage Rm A
4002	Laptop IBMThinkPad		Main Office	Storage Rm A

Buttons: Associate, Remove, Details

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.

2.7.5 Create New Depreciation Class

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

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

The **Create New Depreciation Class** screen can also be accessed from the **Depreciation Class 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 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. Remember that these depreciation methods are selected on the **Add/Edit Depreciation Class** screen. 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 this option if you do not want MobileAsset to fully depreciate the asset.

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

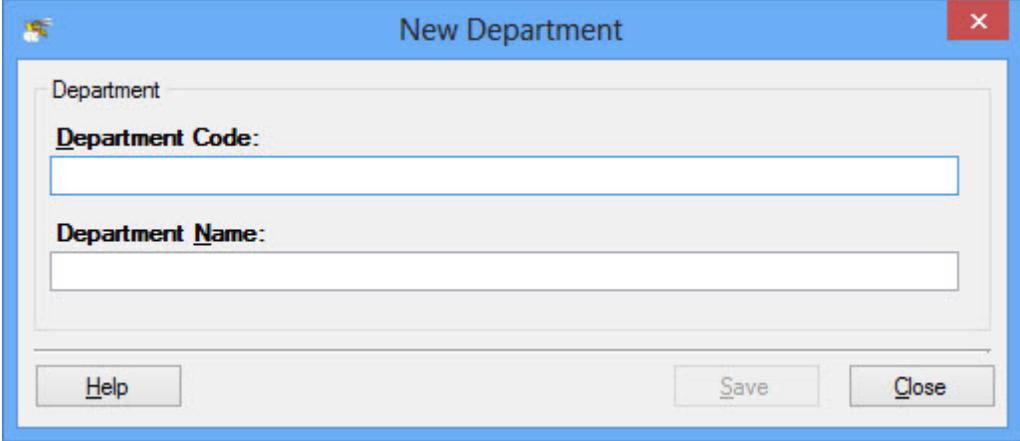
If any method other than None has been selected, information must be entered in the **Years** and/or **Months** fields.

2.7.6 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 screen, from the **Main** screen select **New > Department**.

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



The screenshot shows a window titled "New Department" with a close button (X) in the top right corner. The window contains two text input fields. The first field is labeled "Department Code:" and the second is labeled "Department Name:". Below the input fields 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.

2.7.7 Create New Employee

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

Note: All screen shots in this Help file are of the Professional version of MobileAsset. Not all features/tabs shown in these screens are available in the Standard version of MobileAsset. For information on the benefits of upgrading your software, please click on **Help>Benefits of Upgrading**.

[Accessing the New Employee Screen](#)

[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 Screen

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

The **New Employee** screen can also be accessed from the **Employee List** by click the **New** button on the toolbar. [For more information on using the List screens, 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** screen is divided into tabs. Use the following links to jump ahead to the tab of interest:

[General](#), [Attachments](#), [Picture](#), [Transaction History](#), [Custom Fields](#)

New Employee Screen > General Tab

The screenshot shows the 'New Employee' window with the 'General' tab selected. The form contains the following fields:

- First Name: [Text Box]
- Last Name: [Text Box]
- Employee No.: [Text Box]
- Title: [Text Box]
- Department: [Dropdown Menu]
- Manager: [Dropdown Menu]
- Phone Type: [Dropdown Menu (Work Phone)]
- Phone: [Text Box]
- Ext.: [Text Box]
- Email: [Text Box]
- Address Type: [Dropdown Menu (Work Address)]
- Address 1: [Text Box]
- Address 2: [Text Box]
- Mail Stop: [Text Box]
- City: [Text Box]
- State: [Text Box]
- Postal Code: [Text Box]
- Country: [Text Box]
- Notes: [Text Area]

Buttons at the bottom: Help, Save, Close.

If you intend to use the optional **Manager** field when defining one or more Employees, you must define 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:

The screenshot shows the 'Attachments' tab of the 'New Employee' window. The 'Attachments' list contains:

- Employee Attachment (Folder icon)
- Resume.txt (Document icon)

Buttons on the right side of the Attachments list:

- View
- Add
- Remove
- Set Default Image
- Remove Default Image
- Save to File

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 the current image the "default" image (the image that displays first on the Picture tab) click the **Set Default Image** button.

2. Click **OK** 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**.

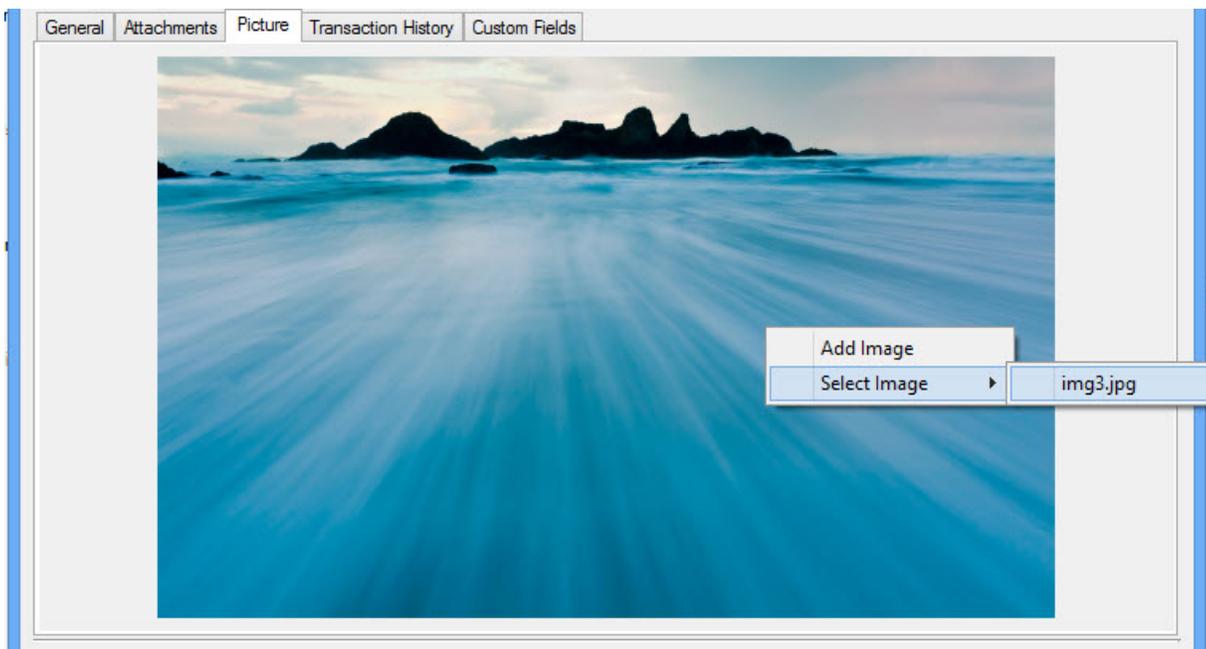
Saving to File:

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

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.



2.7.8 Create New Funding

Funding is only available in the Professional and Enterprise editions of MobileAsset.

The **New Funding** screen allows you to create new funding sources and associate them with specific assets.

1. From the **Main** screen, click **Lists > Funding > New**.

OR

From the **Main** screen, click **New > Funding**.

The **New Funding** screen appears:

2. Enter a **Name** (required) and **Description** for the funding source at the top of the **New Funding** screen.
3. On the **General** tab, enter the following information:

- **Amount** - Enter the dollar amount you received from this funding source.
- **Start/End Dates** - Select the start and end dates for this funding source.
- **Notes** - Enter any additional information you want to associate with this funding source.

Note: The **Total Debits** and **Available Funds** fields are view only fields that display any debits taken from this fund and the resulting available funds amount.

4. The **Associated Assets** section allows you to select individual assets that will receive funding from this source. To add an asset:
 - a. Click the **Add** button. The **Asset List** appears.

- b. Select the Asset or Assets you want to associate with this funding source, then click the **Select** button at the bottom of the **Asset List**. The selected assets will appear in the **Associated Assets** list.

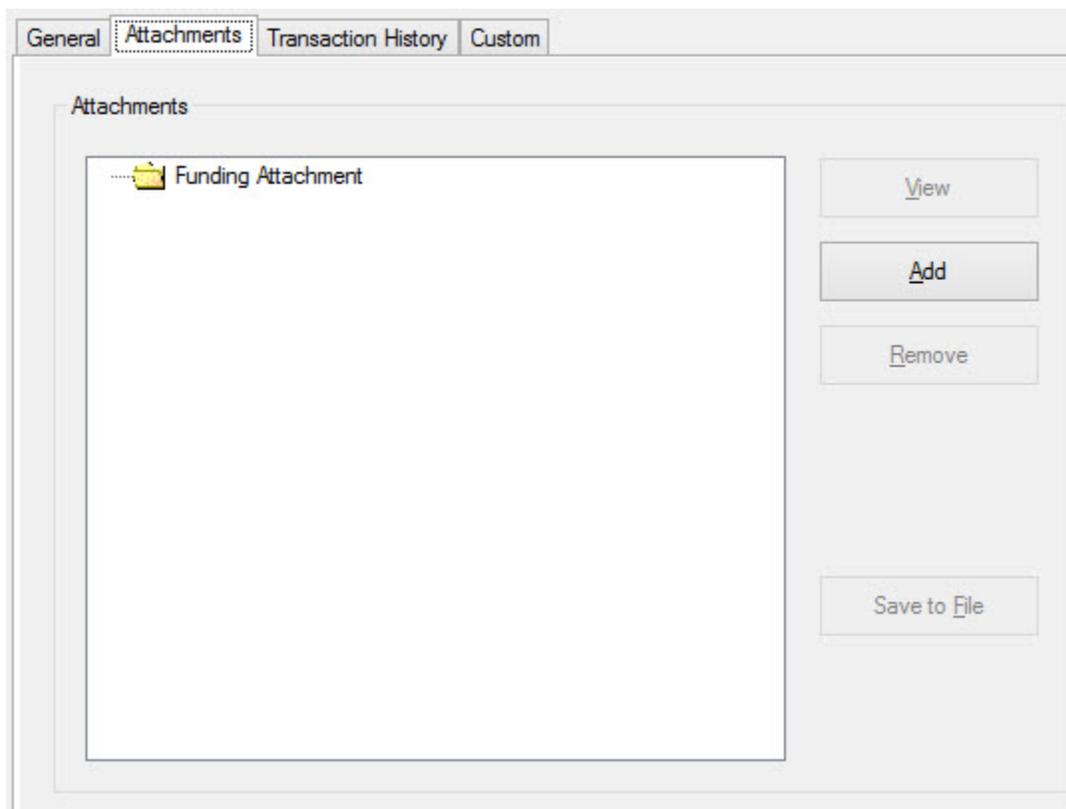
Associated Assets

Asset Status	Debited from Fu...	Purchase Cost	Asset Tag	Asset Description	Asset Type	Asset Type Des...	Site
Active	0.00	0.00	4001	T61 Units	Laptop IBMThin...		Main
Active	0.00	0.00	4002	T61 Units	Laptop IBMThin...		Main
Active	0.00	0.00	4003	T61 Units	Laptop IBMThin...		Main

Select All Clear All Detail Add Remove

- c. You can remove an asset from this list by highlighting it, then clicking the **Remove** button.
- Highlight an asset and click the **Detail** button to see the **Edit Asset** screen for the selected asset.
- d. The **Debited from Fund** field in the list can be edited. You can click on this field to enter the amount of funds used. Please note that the number entered here must be less than the **Purchase Cost** entered on the [New/Edit Asset screen > Depreciation](#) tab.

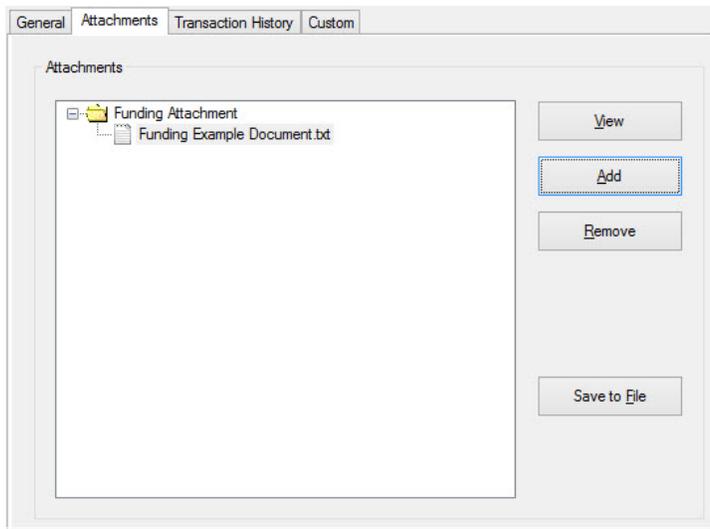
5. The **Attachments** tab allows you to add documents to the fund.



To attach a document to the fund:

- Click the **Add** button on the **Attachments** tab. A browser window appears.
- Navigate to the document, then click the **Open** button at the bottom of the browser screen.

c. The document will be added to the **New Funding** screen as shown below:



d. To view the document, click the **View** button.

To **Remove** the document, click the **Remove** button.

To save the document as a file on your computer, click the **Save to File** button.

6. The **Transaction History** tab lists any transactions that have been performed on this funding source.

Trans Date	Trans Type	Asset Tag	Department	Location	Site	Other Location	Other
4/7/2014	Add	4000		Storage Rm A	Main Office		
4/7/2014	Add	1002		Storage Rm A	Main Office		
4/7/2014	Add	1		Sh1b2	001		

7. The **Custom** tab allows users with to add custom text, numbers or dates. Please refer to the [Using Custom Fields](#) topic for instructions on creating custom text, number and date fields.

2.7.9 Create New Location

The **New Location** screen 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 *Executive Building A23*.

1. To access the **New Location** screen, from the **Main** screen, 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 List screens, 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 value is cryptic (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 to a single Site. [See the Set Working Site help topic for more information.](#)

2.7.10 Create New Manufacturer

The **Create New Manufacturer** screen 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** screen, click **New > Manufacturer**. The **New Manufacturer** screen will appear.

The **New Manufacturer** screen can also be accessed from the Manufacturer 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 **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 red close button in the top right corner. The window contains four tabs: "General Information", "Additional Information" (which is selected and highlighted with a dotted border), "Custom Texts", and "Custom Numbers and Dates".

Under the "Additional Information" tab, there is a section titled "Contact Person Information:" containing five text input fields:

- Contact Name:
- Contact Phone:
- Contact Ext.:
- Contact Cell No:
- Contact Fax:

Below these fields is a larger text area labeled "Notes:". At the bottom of this section is a button labeled "Add Notes".

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

4. For information about the **Custom Texts** and **Custom Numbers and Dates** tabs, 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.

2.7.11 Create New Site

The **New Site** screen 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 *Executive Building A23*. 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** screen, from the **Main** screen click **New > Site**. The **New Site** screen appears.

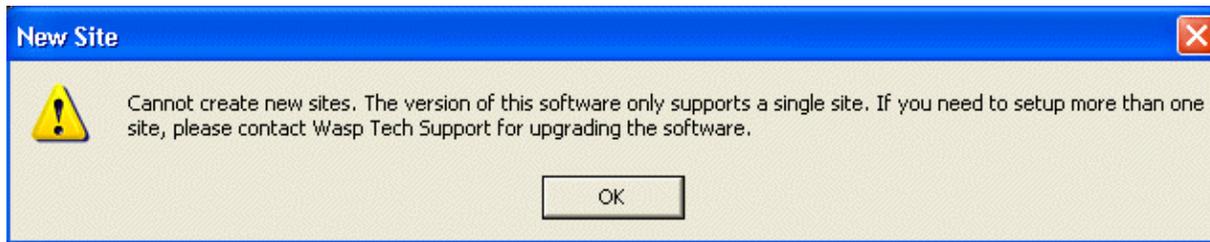
The **New Site** screen can be accessed from the Site List by clicking the **New** button on the toolbar. [For more information on using the List screens, see the Working with Lists topic.](#)

2. **Description** allows you to enter a description of the Site. This is useful when the Site value is cryptic (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 Texts** and **Custom Numbers and Dates** tabs, 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.



2.7.12 Create New Vendor

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

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

The **New Vendor** screen can also be accessed from the **Vendor List** by clicking the **New** 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.

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.

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.

4. You can optionally enter information on the **Custom** tabs. For information about the **Custom Texts** and **Custom Numbers and Dates** tabs, 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.

2.7.13 Using Custom Fields

Custom fields allow you to define fields in MobileAsset to capture information specific to your needs. For example, if you want to capture a special code called Widget Code for each asset entered into MobileAsset, you can turn on the [Edit Field Names](#) function, then create your field on the **Custom Fields** tab of the **New/Edit Asset** screen.

Creating Custom Fields:

1. Make sure the [Edit Field Names function](#) is turned on in the **Options** screen.
2. Open the **Custom Fields** tab on any screen that contains that tab. When the **Edit Field Names** function is turned on, the fields will appear as shown below:

3. Click in the field for which you want to create custom data. Your options differ depending on what type of custom field you are creating (Text, Number or Date).

Custom Text Fields: If you are creating a **Custom Text Field**, the screen shown below appears:

- a. Enter a new name for this field in the **New Name** field.

- b. You can optionally enter a tool tip in the Tool Tip field. Tool Tips provide special instructions to your users when they hover their mouse over the field.
- c. Select if this custom field will be:
 - **Visible** - Selecting this check box makes the custom field visible to all users
 - **Required** - Selecting this check box means the custom field must be completed in order for the new asset (employee, asset type, etc.) to be saved.
 - **Send to Mobile Device** - Selecting this check box causes the custom field to be included in the mobile database that is sent to the mobile device. The custom field will appear on the mobile device.
- d. Click the **Set to Default** button to clear your changes and return the field to its default values.
- e. You can leave this field as a free-form entry field, or create pre-defined values that will appear in a drop down list. Enter a value in the **Pre-Defined Values** section, then click the **Add** button. The new value will appear in the list as shown below:

You can select to make a field the default field by selecting the **Default** checkbox. This means the selected field will appear first in the drop down list. After you enter two or more values, you can highlight one and use the up and down arrows to move it's position in the list.

Select the **Allow Only These Values** checkbox to prevent users from entering free form text in the field.

- f. Click the **OK** button when you are done adding information. The information will now appear in the custom field:

4. **Custom Number or Date Field:** If you are creating a custom number or custom date field, the screen shown below appears:

The screenshot shows a 'Customize Field' dialog box with the following fields and options:

- New Name:** Custom &Number 1
- Form:** Asset
- Tool tip:** Enter a custom number.
- Visible
- Required
- Send To Mobile Device
- Buttons: Set To Default, Help, OK, Cancel

- a. Enter a name for the custom field in the New Name field.
 - b. You can optionally enter a tool tip in the Tool Tip field. Tool Tips provide special instructions to your users when they hover their mouse over the field.
 - c. Select if this custom field will be:
 - **Visible** - Selecting this check box makes the custom field visible to all users
 - **Required** - Selecting this check box means the custom field must be completed in order for the new asset (employee, asset type, etc.) to be saved.
 - **Send to Mobile Device** - Selecting this check box causes the custom field to be included in the mobile database that is sent to the mobile device. The custom field will appear on the mobile device.
- a. Click **OK** when you are done entering information.

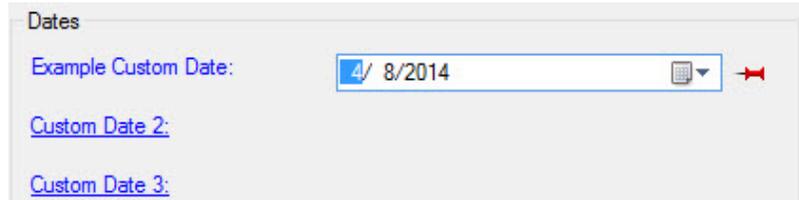
Below is an example of a **Custom Number** field:

The screenshot shows a 'Numbers' section with the following fields:

- Example Custom Number:** 123456
- Custom Number 2:**
- Custom Number 3:**

The user can enter a number in the free form field. Custom Number fields will accept values ranging from -999999999999999.9999 to 999999999999999.9999.

Below is an example of a **Custom Date** field:



Dates

Example Custom Date:  

[Custom Date 2:](#)

[Custom Date 3:](#)

The user can select the **Calendar** icon to choose a date. Custom Dates will be displayed in the same format as found elsewhere in the product: "day of the week, month dd, ccy".

4. Repeat these steps until you have created the needed number of custom fields.

2.7.14 Using Dynamic Custom Fields

Dynamic Custom Fields are customized text, date and/or number fields that you create on Asset Types. The field(s) will appear on the Dynamic Custom Field tab of any assets that are assigned to that asset type. These fields differ from regular custom fields in that you can set them to be associated with a specific asset type, multiple asset types that you select or on all asset types. You can also create a tooltip for each field to provide users with information on what data should be entered. Dynamic Custom Fields can be searched via the [Search](#) screens or the [Search field on the Main screen](#). In addition, Dynamic Custom Fields can be edited via the [Mass Update](#) function.

You may not want to use **Dynamic Custom Fields** to capture certain data. Though they can be set to appear on specific Asset Types, the data within them cannot be sorted, grouped, exported or imported. If you need to perform any of these functions on the data captured in the field, you may want to create a [Custom Field](#).

[Create a New Dynamic Custom Field](#)

[Edit a Dynamic Custom Field](#)

[Delete a Dynamic Custom Field](#)

[Add an Existing Dynamic Custom Field](#)

Create a New Dynamic Custom Field

1. On the [New/Edit Asset Type](#) screen, click on the **Dynamic Custom Fields** tab.

The screenshot shows the 'New Asset Type' dialog box. At the top, there are two input fields: 'Asset Type:' and 'Description:'. Below these are five tabs: 'General', 'Attachments', 'Picture', 'Custom Fields', and 'Dynamic Custom Fields'. The 'Dynamic Custom Fields' tab is selected and active. It contains a table with the following columns: Position, Label, Data Type, Is Global, Tool Tip, Visible, and Required. The table is currently empty, with the text 'No records found. Make sure there is no filter set.' displayed in the center. Below the table, there are navigation controls showing 'Record: 0 Of 0' and buttons for 'New', 'Delete', 'Edit', 'Add Existing', and arrows. At the bottom of the dialog are 'Help', 'Save', and 'Close' buttons.

Note: If a **Dynamic Custom Field** has been created on a different **Asset Type** and marked **Global**, it will appear in this list.

2. Click the **New** button. A drop down menu will appear.
3. Select **Text**, **Number** or **Date** from the drop down menu.

The **Create New Dynamic Custom Field** will appear. This screen will differ depending on which type of field you chose to create.

Creating a Text Field:

- a. On the **Create New Dynamic Custom Field**, enter the name of the field in the **DCF Name** field. This name will appear as the field label on the **New/Edit Asset Screen > Dynamic Custom Fields** tab.

The screenshot shows the 'Create New Dynamic Custom Field' dialog box. The 'DCF Name' field is highlighted with a red box and contains the text 'Example Dynamic Custom Field'. Below it is a 'Tool tip' text area. To the right, the 'DCF Asset Type List' has radio buttons for 'Current' (selected), 'Multiple', and 'Global'. Below this is a table with columns 'Asset Type' and 'Description'. The table contains two rows: one with a checked checkbox, 'Current New Asset Type', and 'Current New Asset'; and another with an unchecked checkbox, '1587', and '17" Monitor'. To the right of the table is a 'Pre Defined Values' section with a table with columns 'Values' and 'Default', and an 'Add' button. Below the table are up and down arrow buttons and a 'Delete' button. At the bottom left are 'Visible', 'Required', and 'Send To Mobile Device' checkboxes, all of which are checked. At the bottom right are 'OK' and 'Cancel' buttons. A 'Help' button is at the bottom left.

- b. Enter the text of the tooltip that will appear when the user hovers their mouse over the field. This should be instructional text telling the user what type of information to enter.

This is a close-up view of the 'Create New Dynamic Custom Field' dialog box. The 'DCF Name' field contains 'Example Dynamic Custom Field'. The 'Tool tip' text area is highlighted with a red box and contains the text 'Enter text in this field.'. Below the text area is a 'Visible' checkbox, which is checked. The 'DCF Asset Type List' is partially visible on the right, showing the 'Current' radio button selected and the table with 'Current New Asset Type' and '1587'.

- c. Use the check boxes to mark if you want this dynamic custom field to be:

- **Visible** - Selecting this check box makes the custom field visible to all users.
- **Required** - Selecting this check box means the custom field must be completed in order for the new asset to be saved.

- **Sent to Mobile Device** - Selecting this check box means this field will be visible to the mobile device and will appear on the **Type** tab when creating new assets.

- d. Select the asset types on which you want this field to appear.

Asset Type	Description
<input checked="" type="checkbox"/> Current New Asset Type	Current New Asset
<input type="checkbox"/> 1587	17" Monitor

The **DCF Asset Type List** contains a list of all your asset types. Select the check box in front of the Asset Type to add the field to it. You can also use the radio buttons above the list to make your selection.

- **Current** - Select this option to only add this field to the asset type you are currently creating. This is the default selection.

- **Multiple** - Select this option to allow the selection of additional assets in the list. Selecting this option enables the **Select All** and **De-Select All** buttons at the bottom of the list.

DCF Asset Type List

Current
 Multiple
 Global

Asset Type	Description
<input checked="" type="checkbox"/> Current New Asset Type	Current New Asset
<input type="checkbox"/> 1587	17" Monitor

< >

- **Global** - Select this option to add the field to all Asset Types in your system.

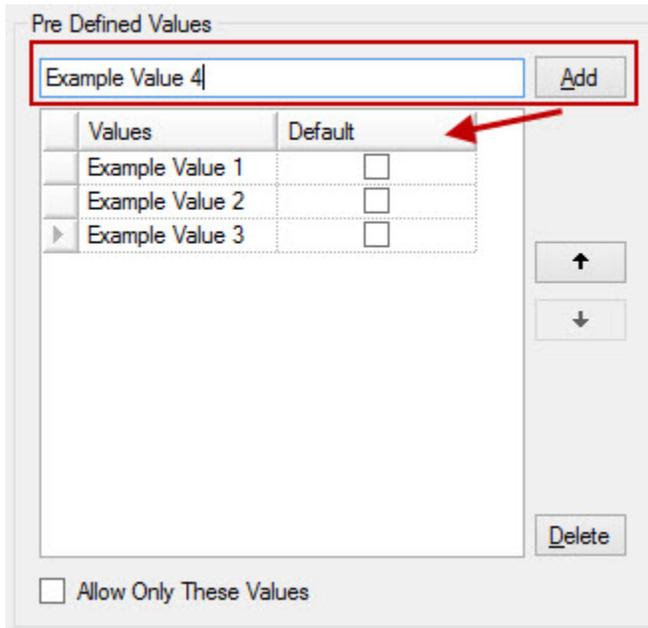
DCF Asset Type List

Current
 Multiple
 Global

Asset Type	Description
<input checked="" type="checkbox"/> Current New Asset Type	Current New Asset
<input checked="" type="checkbox"/> 1587	17" Monitor

< >

- e. You can leave this field as a free-form entry field, or create pre-defined values that will appear in a drop down list. Enter a value in the **Pre-Defined Values** section, then click the **Add** button. The new value will appear in the list as shown below:

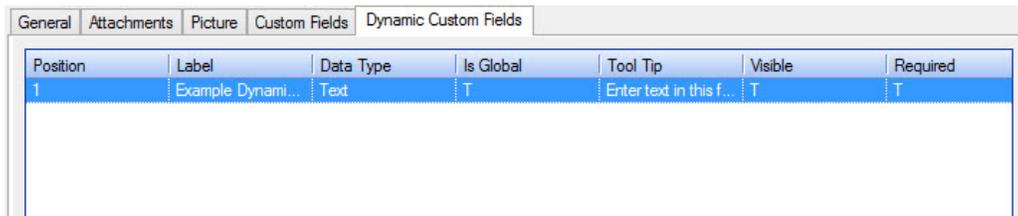


You can select to make a field the default field by selecting the **Default** check box. This means the selected field will appear first in the drop down list. After you enter two or more values, you can highlight one and use the up and down arrows to move it's position in the list.

Select the **Allow Only These Values** check box to prevent users from entering free form text in the field.

Highlight a value and click the **Delete** button to remove it from the list.

- f. When you have finished setting up the field, click the **OK** button. The new field now appears in the list on the **Dynamic Custom Field** tab of the **New/Edit Asset Type** screen..

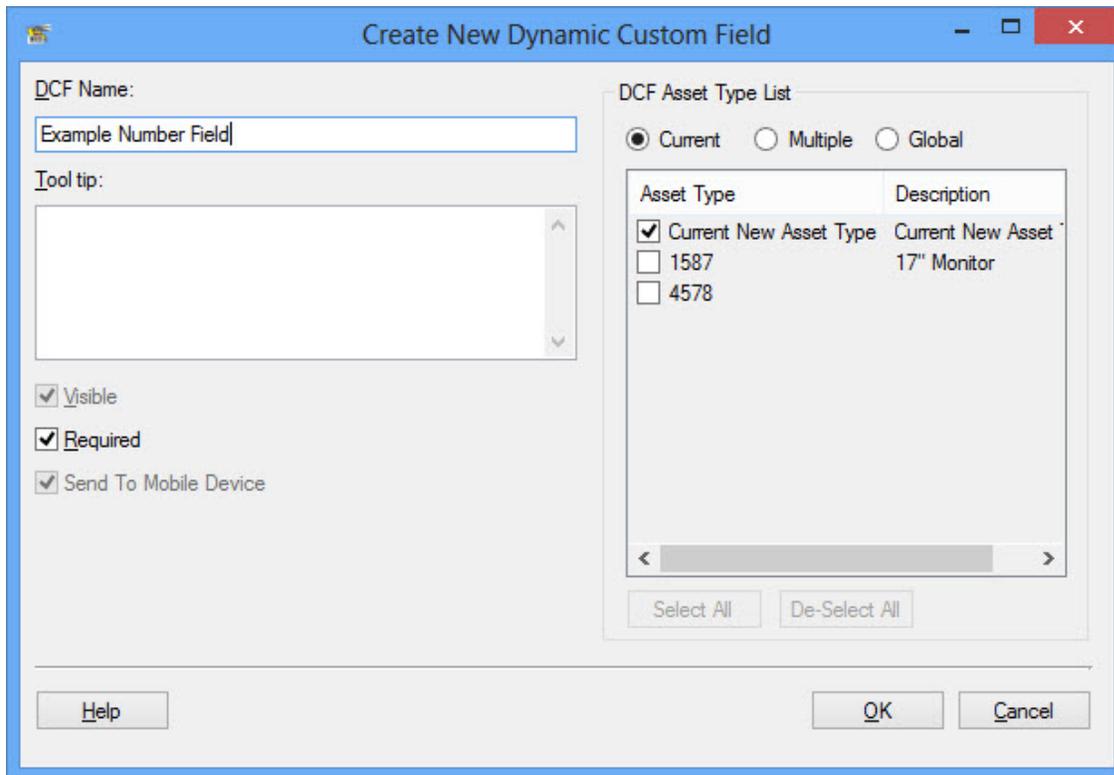


The field will appear on the **New/Edit Asset > Dynamic Custom Field** tab of any assets associated with the asset types to which this new field is assigned.

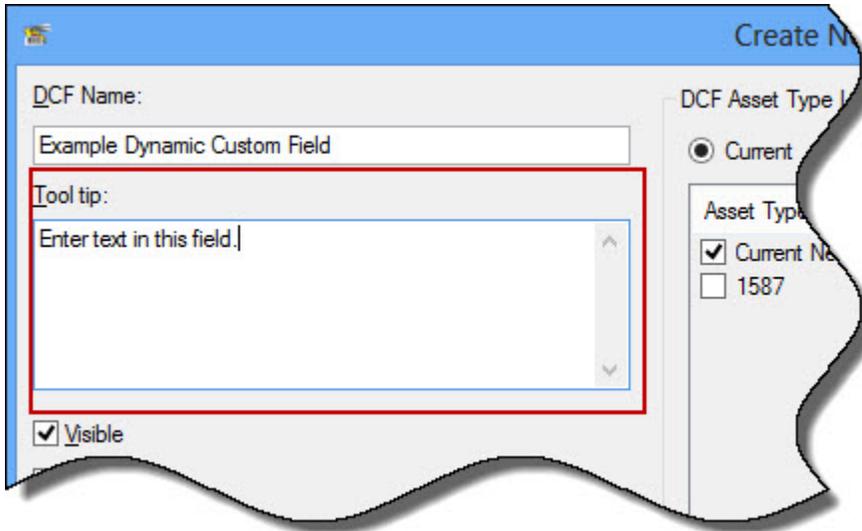


Creating a Number Field:

- a. On the **Create New Dynamic Custom Field** screen, enter the name of the field in the **DCF Name** field. This name will appear as the field label on the **New/Edit Asset Screen > Dynamic Custom Fields** tab.



- b. Enter the text of the tooltip that will appear when the user hovers their mouse over the field. This should be instructional text telling the user what type of information to enter.



- c. Use the check boxes to mark if you want this dynamic custom field to be:

DCF Name:
Example Dynamic Custom Field

Tool tip:
Enter text in this field.

Visible
 Required
 Send To Mobile Device

- **Visible** - Selecting this check box makes the custom field visible to all users.
 - **Required** - Selecting this check box means the custom field must be completed in order for the new asset to be saved.
 - **Sent to Mobile Device** - Selecting this check box means this field will be visible to the mobile device and will appear on the Type tab when creating new assets.
- d. Select the asset types on which you want this field to appear.

DCF Asset Type List

Current Multiple Global

Asset Type	Description
<input checked="" type="checkbox"/> Current New Asset Type	Current New Asset
<input type="checkbox"/> 1587	17" Monitor

< >

Select All De-Select All

The **DCF Asset Type List** contains a list of all your asset types. Select the check box in front of the Asset Type to add the field to it. You can also use the radio buttons above the list to make your selection.

- **Current** - Select this option to only add this field to the asset type you are currently creating. This is the default selection.

- **Multiple** - Select this option to allow the selection of additional assets in the list. Selecting this option enables the **Select All** and **De-Select All** buttons at the bottom of the list.

DCF Asset Type List

Current Multiple Global

Asset Type	Description
<input checked="" type="checkbox"/> Current New Asset Type	Current New Asset
<input type="checkbox"/> 1587	17" Monitor

< [Progress Bar] >

Select All De-Select All

- **Global** - Select this option to add the field to all Asset Types in your system.

DCF Asset Type List

Current Multiple Global

Asset Type	Description
<input checked="" type="checkbox"/> Current New Asset Type	Current New Asset
<input checked="" type="checkbox"/> 1587	17" Monitor

< [Progress Bar] >

Select All De-Select All

- e. When you have finished setting up the field, click the **OK** button. The new field now appears in the list on the **Dynamic Custom Field** tab on the **New/Edit Asset Type** screen.

Position	Label	Data Type	Is Global	Tool Tip	Visible	Required
1	Example Dynami...	Text	T	Enter text in this f...	T	T
2	Example Field 2	Number	F		T	T
3	Example Number...	Number	F	Enter a number i...	T	T

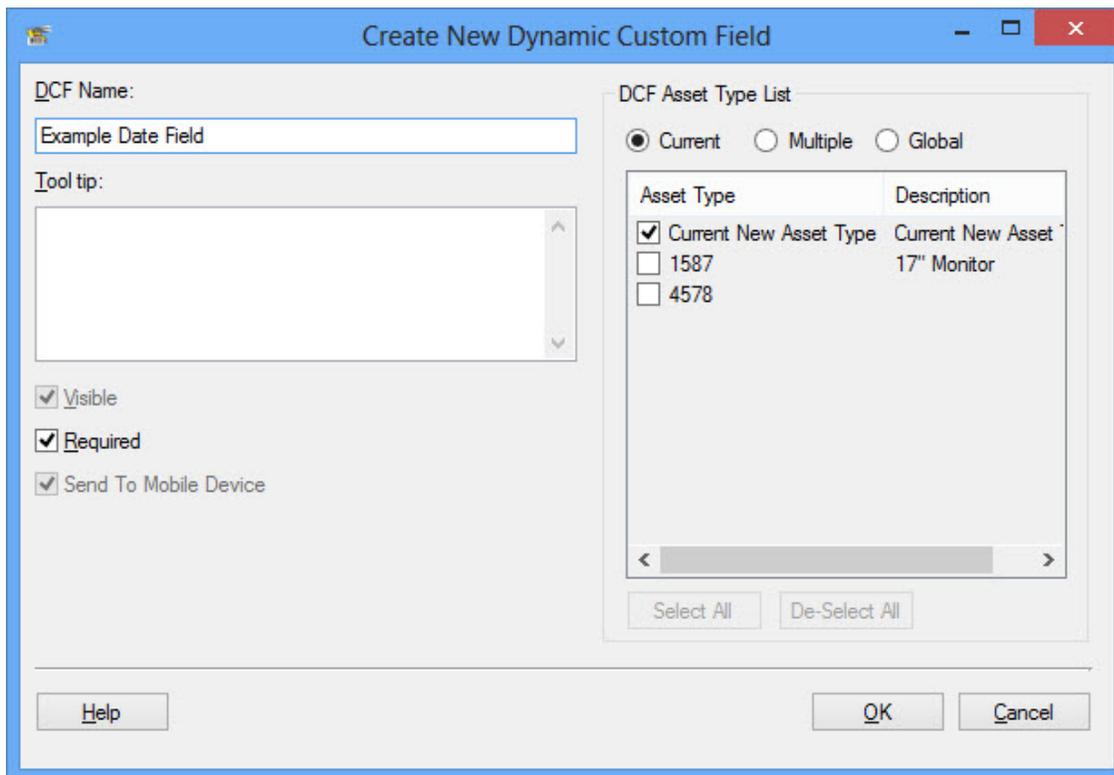
The field will appear on the **New/Edit Asset > Dynamic Custom Field** tab of any assets associated with the

asset types to which this new field is assigned.



Create a Date Field:

- a. On the **Create New Dynamic Custom Field**, enter the name of the field in the **DCF Name** field. This name will appear as the field label on the **New/Edit Asset Screen > Dynamic Custom Fields** tab.



- b. Enter the text of the tooltip that will appear when the user hovers their mouse over the field. This should be instructional text telling the user what type of information to enter.

DCF Name: Example Dynamic Custom Field

Tool tip: Enter text in this field.

Visible

DCF Asset Type

Current

Asset Type

Current No

1587

- c. Use the check boxes to mark if you want this dynamic custom field to be:

DCF Name: Example Dynamic Custom Field

Tool tip: Enter text in this field.

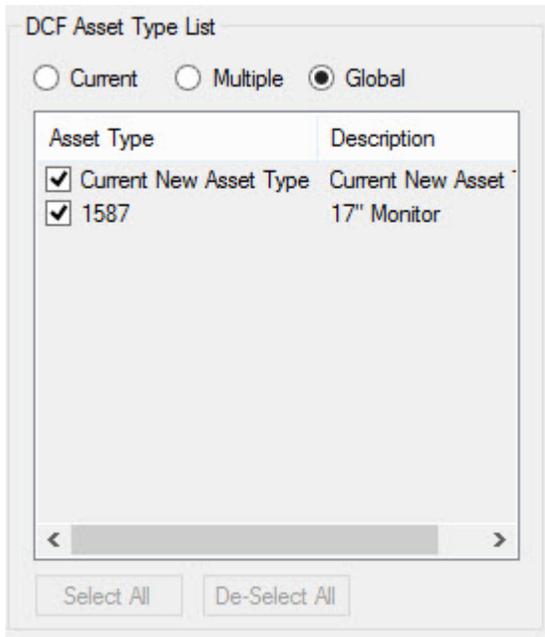
Visible

Required

Send To Mobile Device

- **Visible** - Selecting this check box makes the custom field visible to all users.
 - **Required** - Selecting this check box means the custom field must be completed in order for the new asset to be saved.
 - **Sent to Mobile Device** - Selecting this check box means this field will be visible to the mobile device and will appear on the Type tab when creating new assets.
- d. Select the asset types on which you want this field to appear.

- **Global** - Select this option to add the field to all Asset Types in your system.



- e. When you have finished setting up the field, click the **OK** button. The new field now appears in the list on the **Dynamic Custom Field** tab on the **New/Edit Asset Type** screen.

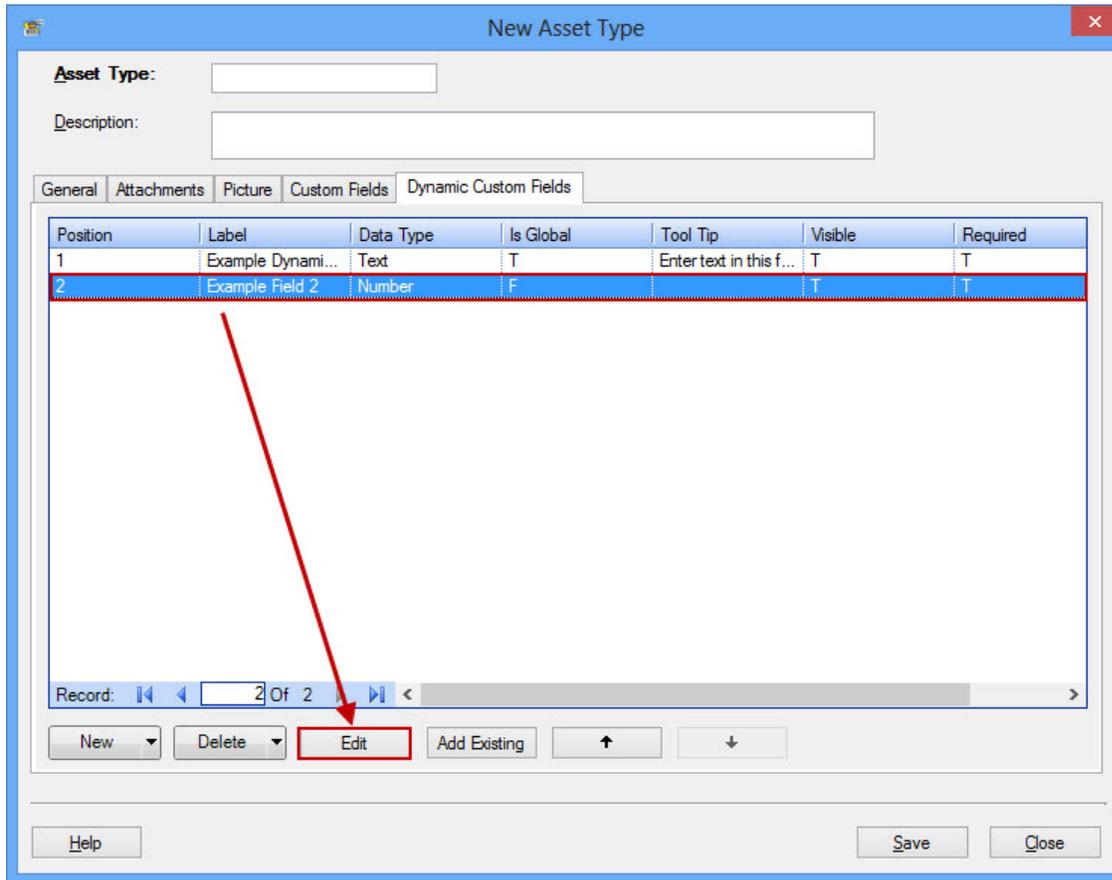
Position	Label	Data Type	Is Global	Tool Tip	Visible	Required
1	Example Dynami...	Text	T	Enter text in this f...	T	T
2	Example Field 2	Number	F		T	T
3	Example Number...	Number	F	Enter a number i...	T	T

The field will appear on the **New/Edit Asset > Dynamic Custom Field** tab of any assets associated with the asset types to which this new field is assigned.

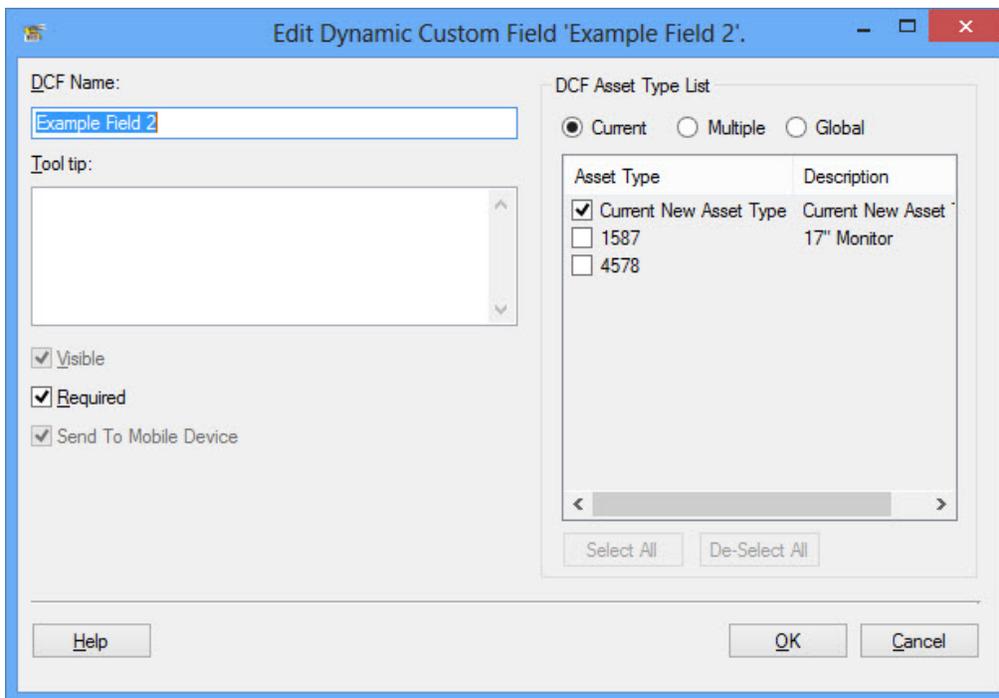


Edit an Existing Dynamic Custom Field

1. On the **New Asset Type** screen > **Dynamic Custom Field** tab, highlight the listing you want to edit, then click the **Edit** button.



The **Edit Dynamic Custom Field** screen appears:



2. Make changes as needed on this screen, then click the **OK** button.

Delete a Dynamic Custom Field

Highlight a listing on the **New Asset Type > Dynamic Custom Fields** screen, then click the **Delete** button. A drop down menu will appear. Options are:

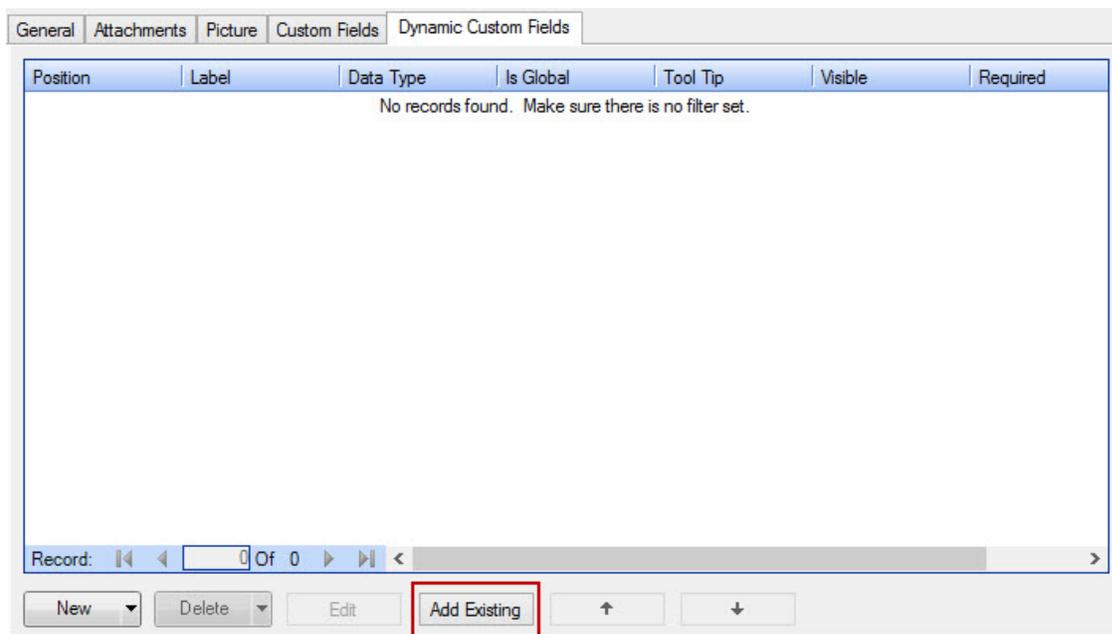
For Current - Deletes the Dynamic Custom Field you have selected on the list for this asset type only.

For All - Deletes the Dynamic Custom Field you have selected from all asset types to which it is assigned.

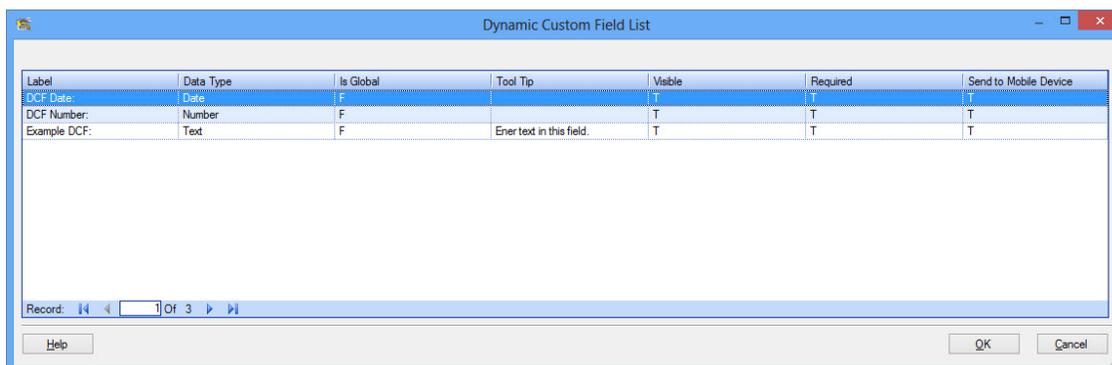
Note: If you select **For All**, all unsaved Dynamic Custom Fields will be deleted from the asset type.

Add An Existing Dynamic Custom Field

1. On the **New/Edit Asset screen > Dynamic Custom Field tab**, click the **Add Existing** button.



The **Dynamic Custom Field List** appears displaying all fields you have already created.



2. Highlight the field you want to add, then click the **OK** button.

3. The **Edit Dynamic Custom Field** screen will appear displaying the select field's information. [Edit](#) the field as needed.
4. Click **OK** on the **Edit** screen to close it.
5. The field is added to the **Dynamic Custom Field** tab on the **New/Edit Asset** screen and will appear on the **New/Edit Asset > Dynamic Custom Field** tab of any assets associated with the asset types to which this new field is assigned.

2.8 Editing Information

2.8.1 Edit Asset

The **Edit Asset** screen allows you to modify an existing asset. This screen 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** screen, 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.](#)

2.8.2 Edit Asset Type

The **Edit Asset Type** screen allows you to modify an existing asset type. This screen 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 screens, 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** screen, except all the information previously entered for the asset type 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 Type topic.](#)

2.8.3 Edit Contract/License

The **Contracts/Licenses** feature is only available in the Professional and Enterprise versions of MobileAsset.

The **Edit Contract/License** screen allows you to modify an existing contract/license. This screen is accessed from the **Contracts List** by highlighting a contract 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 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.](#)

2.8.4 Edit Customer

The **Edit Customer** screen allows you to modify an existing customer. This screen is accessed from the **Customer List** by highlighting a customer 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 Customer** screen is identical to the **New Customer** screen, except all the information previously entered for the customer appears on the screen. You can change any of this information. [For information on using the New Customer screen, please refer to the Create New Customer topic.](#)

2.8.5 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** screen, 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.

2.8.6 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 List screens, see the Working with Lists topic.](#)

The **Edit Department** screen is identical to the **New Department** screen, 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.](#)

2.8.7 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 List screens, see the Working with Lists topic.](#)

The **Edit Employee** screen is identical to the **New Employee** screen, 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.](#)

2.8.8 Edit Funding

Funding is only available in the Professional and Enterprise editions of MobileAsset.

The **Edit Funding** screen allows you to modify an existing funding source. This screen is accessed from the **Funding List** by highlighting an funding source 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 Funding** screen is identical to the **New Funding** screen, except all the information previously entered for the funding source 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 Funding topic.](#)

2.8.9 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 List screens, see the Working with Lists topic.](#)

The **Edit Location** screen is identical to the **New Location** screen, 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.](#)

2.8.10 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 List screens, 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.](#)

2.8.11 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 List screens, 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 screen, please refer to the Create New Site topic.](#)

2.8.12 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 List screens, 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.](#)

2.8.13 Mass Update

MobileAsset allows you to select multiple assets from the Asset List and update a number of fields. For example, if you want to update warranty information for all assets under a certain Asset Type, you can select all of those assets on the Asset List and make the change at one time.

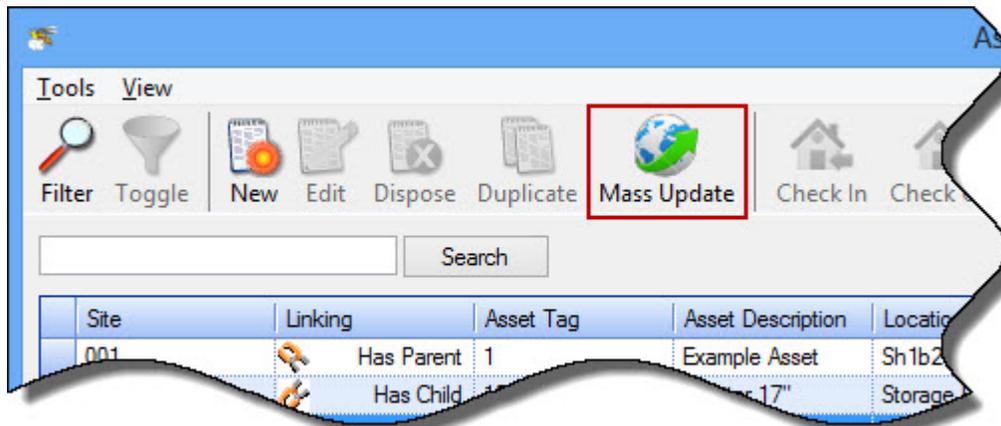
Using Mass Update:

1. From the **Main** screen, select **List Forms > Asset List**.

or

From the **Main** screen, select **Asset Management > List Assets**.

2. On the **Asset List** screen, select the assets you want to update. You can use the filter features to drill down to the assets you want. In the example below, we have filtered for Asset Type = Laptop IBM.
3. Now select all assets you want to change by holding down the **Ctrl** key and clicking on each one you want. Or you can select assets by holding down the SHIFT key and clicking on two assets. All assets in between the two you clicked on will be selected.
4. When you have selected the assets you want to change, click the **Mass Update** button on the toolbar:



The **Mass Update** screen appears:

Asset Tag	Asset Description	Asset Type	Department Code	Condition	Manufacturer	Model
4000	T61 Units	Laptop IBMThin...	IT			
4001	T61 Units	Laptop IBMThin...	IT			
4002	T61 Units	Laptop IBMThin...	IT			

Record: 1 Of 3

General Custom Fields Dynamic Custom Fields

General

Department Code: [Dropdown]

Condition: [Dropdown]

Asset Type: [Dropdown]

Description: [Text]

Description: [Dropdown]

Manufacturer: [Dropdown]

Model: [Dropdown]

Vendor Number: [Dropdown]

Check Out Length: 0 days 0 hrs 0 min

Check Out Lead: 0 days 0 hrs 0 min

Reminder Lead Time: 0 days 0 hrs 0 min

Additional Info: [Text Area]

Depreciation

One or more selected asset types can not be depreciated.

Purchase Order: [Dropdown]

Purchase Date: [Date]

Purchase Cost: 0.00

Salvage Value: 0.00

Depreciation Begin Date: [Date]

Warranty

Begin: [Date]

End: [Date]

Provider: [Dropdown]

Help Save Cancel

- The top portion of the **Mass Update** screen displays the assets you have selected. If needed, scroll through the columns in this window using the bar on the right. As with other lists in MobileAsset, you can sort the list by clicking on the column headers.
- Select the checkboxes in front of each field you want to update, then enter the information you want to change. Any fields you have selected (a checkmark will appear in the box as shown in the example below) will be updated. Unchecked fields will not be updated. Remember that once you click **Save**, any information you enter here will be applied to all assets that appear in the window.

You can manually type information into the fields or use the drop down menus. Most drop down menus will provide the options of <Blank> and <More>. <Blank> means any information previously contained in the field will be removed. <More> accesses the associated List screen allowing you to select from all Manufacturers, Vendors, etc.

Any fields that appear in bold are required fields. You cannot select Blank for required fields. Which fields are required will vary depending on your Custom Field Name settings.

Keep in mind that the **Depreciation** checkbox cannot be selected unless all assets in the **Mass Update** window are associated with an Asset Type that can be depreciated. Depreciation is activated at the **Asset Type** level on the **New Asset Type** or **Edit Asset Type** screen.

If the [Edit Inherited Asset Type Data](#) option is disabled on the **Options** screen, you will not be able to edit data under the **Asset Type**.

Tap on the **Custom Fields** or [Dynamic Custom Fields](#) tabs to make updates to the values selected for any custom fields. Dynamic Custom Fields will only appear if they are associated with every asset being updated. For example, if you have selected 3 assets with the Asset Type - Printer, and one asset with the Asset Type - Monitor, and a DCF has been created for Printer, but not for Monitor, the Dynamic Custom Fields tab will be blank.

7. After you have entered information in the desired fields, click the **Save** button. Remember that once you click **Save**, any information you enter here will be applied to all assets that appear in the window.

2.9 Using the List Screens

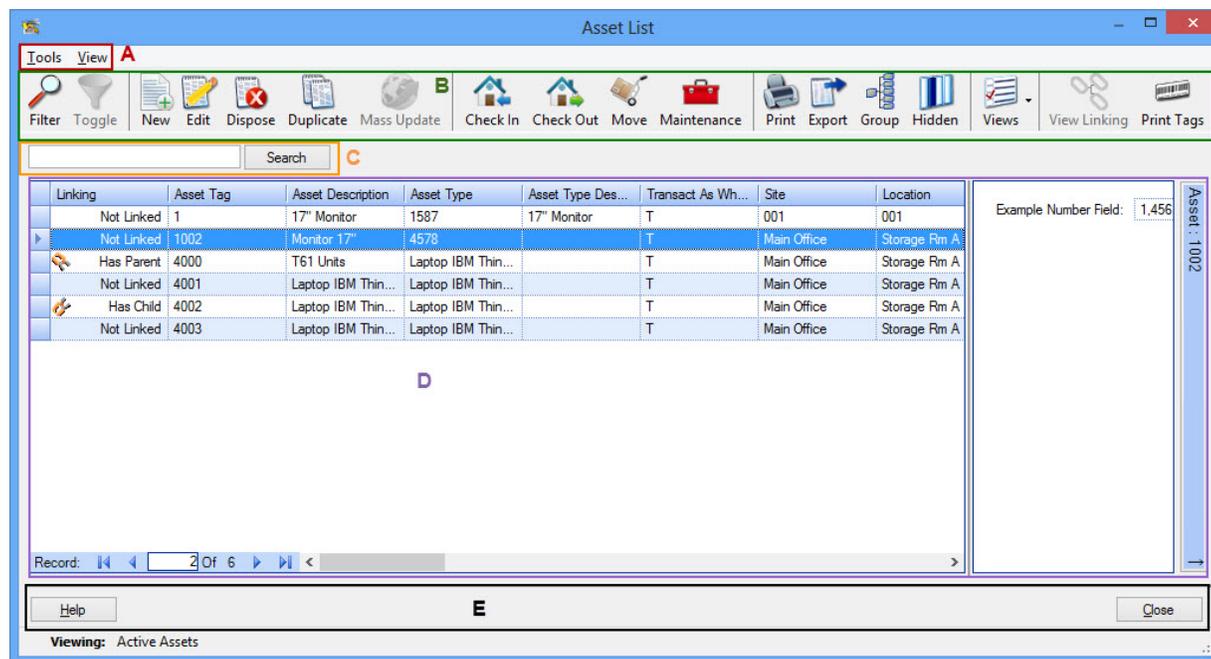
2.9.1 Working with Lists

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

- Assets
- Asset Types
- Contracts/Licenses
- Customers
- Departments
- Depreciation Classes
- Employees
- Funding
- Locations
- Manufacturers
- Sites
- Transactions
- Vendors

Note: These screens all function the same; however, individual options may vary for each screen. This topic covers how to use all functions available on the list screens. Keep in mind that not all list screens contain all functions mentioned here. In addition, some of these functions are available in the Professional and Enterprise editions of MobileAsset only. If you are using the Standard edition of MobileAsset, those options specific to the Professional and Enterprise editions will not appear on your screen. Most screen shots in this Help file are of the Professional edition of MobileAsset. Not all features/tabs shown on these screens are available in the Standard edition of MobileAsset. Any items that are specific to the Professional and Enterprise editions are marked as such in this documentation.

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. The list screens are divided into sections (labeled A through E in the example below):



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

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](#)
 - ["Context-Sensitive Menus"](#)
-

Section A: Menu Bar

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

Tools- Accesses the **Reset View Settings** function. This option is found at the top of all lists. Select this option to reset all lists to their default settings. All filters, rearranged columns, group settings, etc. will be reverted to their default statuses.

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

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

Section B: Toolbar

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.

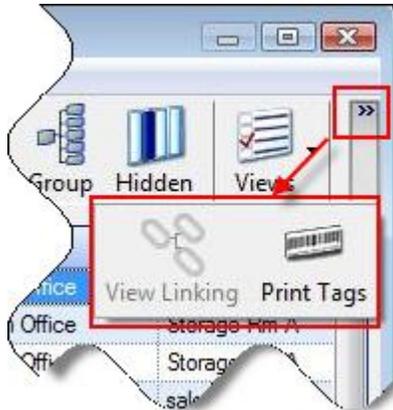
Re-Ordering Icons - You can re-order the icons contained in the toolbars. For example, you can move the Magnifying Glass icon (access the Filter function) from the far left position on the toolbar to the far right position. To do this:

1. Press and hold the **ALT** key on your keyboard,
2. Click on an icon and drag it to a new position on the toolbar.

Displaying Hidden Icons - If the list contains too many icons to display at one time you will see a double arrows icon in the top right corner of the toolbar as shown below:



Click on the double arrows to display the hidden icons:

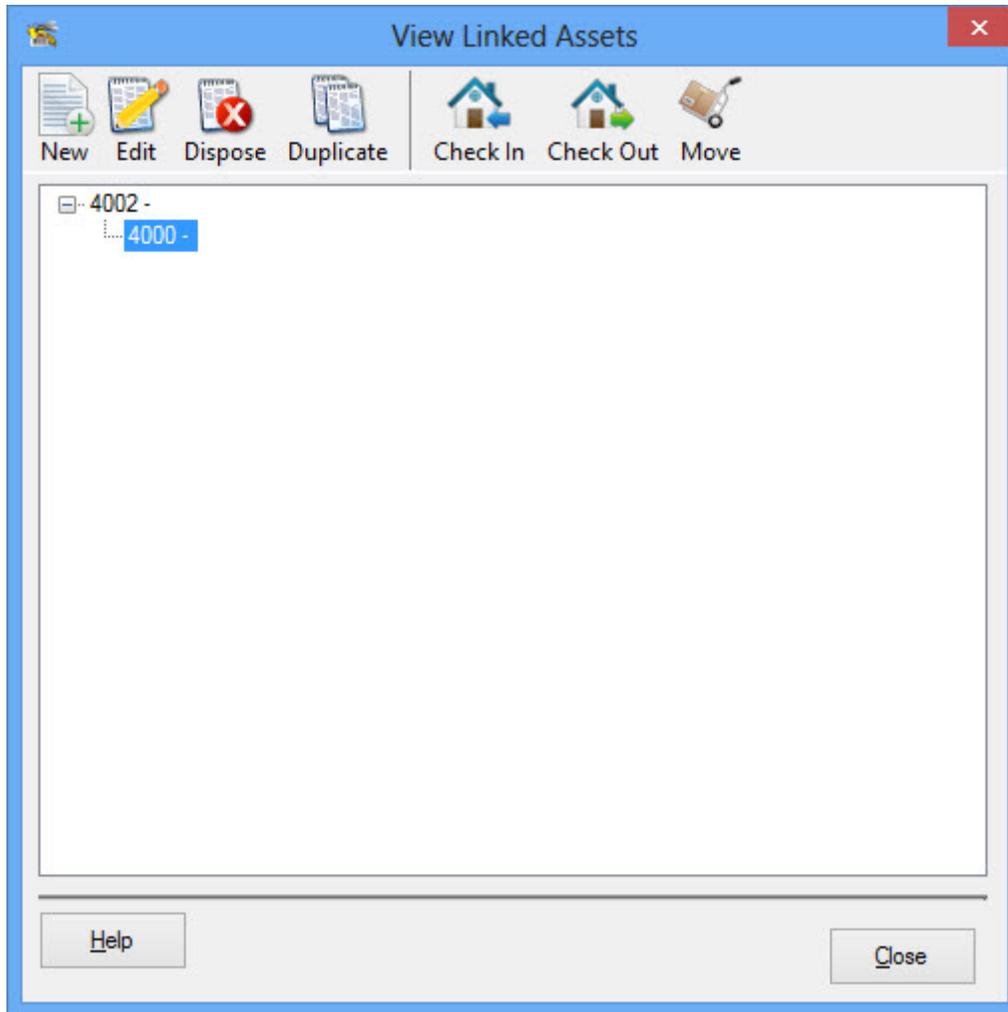


Each of the functions available on the toolbars is described below:

Button	Description
Filter	Accesses the Find screen allowing you to quickly enter information to narrow your search. For more information on the Find screen, please see the Simple Find help topic.
Toggle Filter	Toggle Filter - Once you have entered a <i>filter</i> (specific search criteria entered on the Find screen to narrow the search results) on the Find screen, the list results will be limited to the information you entered. For example, if on the Find screen you designated that you want to view only items with Asset Tag 243, only the item with Asset Tag 243 will appear in your list. You can click on the Toggle Filter button to revert back to seeing all of the list items. Click it again to reapply your filter.
New	New - Accesses the New screen allowing you to enter a new Asset, Asset Type, etc.
Edit	Edit - Assesses the Edit screen allowing you to update and change information.
Dispose	Dispose or Delete - This icon is called Dispose on the Asset List. It allows you to Dispose of the selected item in the list. For more information on the Dispose transaction, please see the Dispose help topic. This icon is called Delete on other lists. It allows you to delete selected items in the lists.
Duplicate	Duplicate - Allows you to copy the information from the item selected in the list to a new item.
Mass Update	Mass Update - MobileAsset allows you to select multiple Assets from the Asset List and update a number of fields. For example, if you want to update warranty information for all Assets under a certain Asset Type, you can select all of those assets on the Asset List and make the change at one time. For more information on the Mass Update transaction, please see the Mass Update help topic.
Check In	Check In- Accesses the Check In screen allowing you to check in an asset. For more information on the Check In feature, please see the Check-In help topic.
Check Out	Check Out - Accesses the Check Out screen allowing you to check out an asset to an employee or customer. For more information on the Check Out feature, please see the Check-Out help topic.
Move	Move - Accesses the Move screen allowing you to move one or more assets from one location to another. For more information on the Move feature, please see the Move help topic.
Maintenance	Maintenance - Accesses the Maintenance screen allowing you to set up one time or recurring maintenance on an asset. For more information on the Maintenance feature, please see the Maintenance help topic.
View	View Linking- This option appears on the Professional and Enterprise editions only. If you are

Linking

using asset linking, highlight a listing, then click the **View Links** button to view the parent asset and any children. Below is an example of the **View Linked Assets** screen.

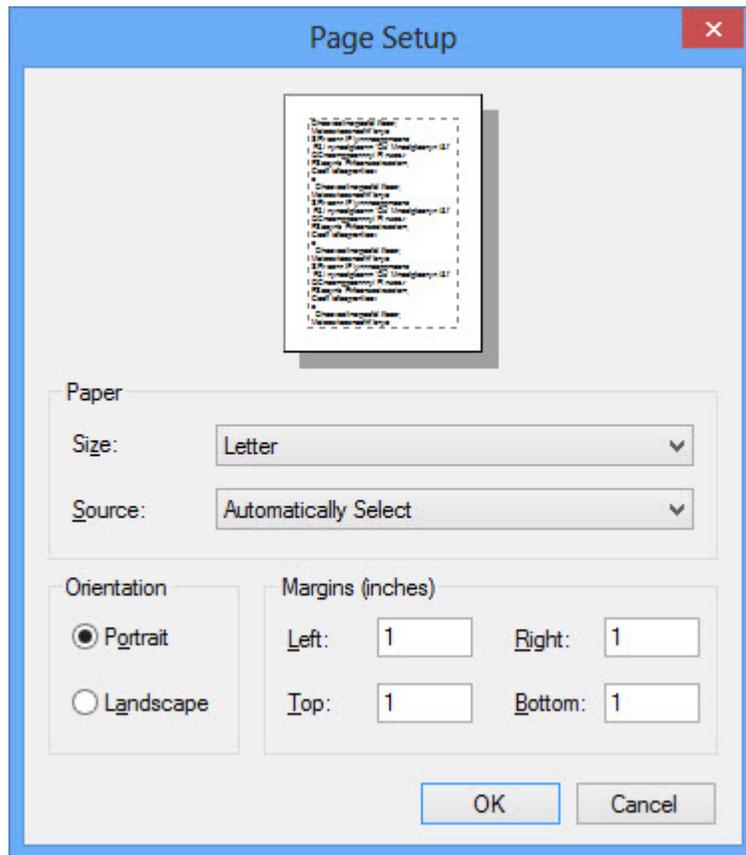


There is a toolbar at the top of this screen allowing you to perform actions on the assets on the screen. These functions are listed below:

- **New**
- **Edit**
- **Dispose**
- **Duplicate**
- **Check In**
- **Check Out**
- **Move**

Print

Print - Allows you to print the list. When this button is selected, a standard **Page Setup** screen appears allowing you to enter margins. An example of this screen is shown below:



Click the **OK** button on the **Page Setup** screen to print the list. The list will print to your default printer.

Export

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

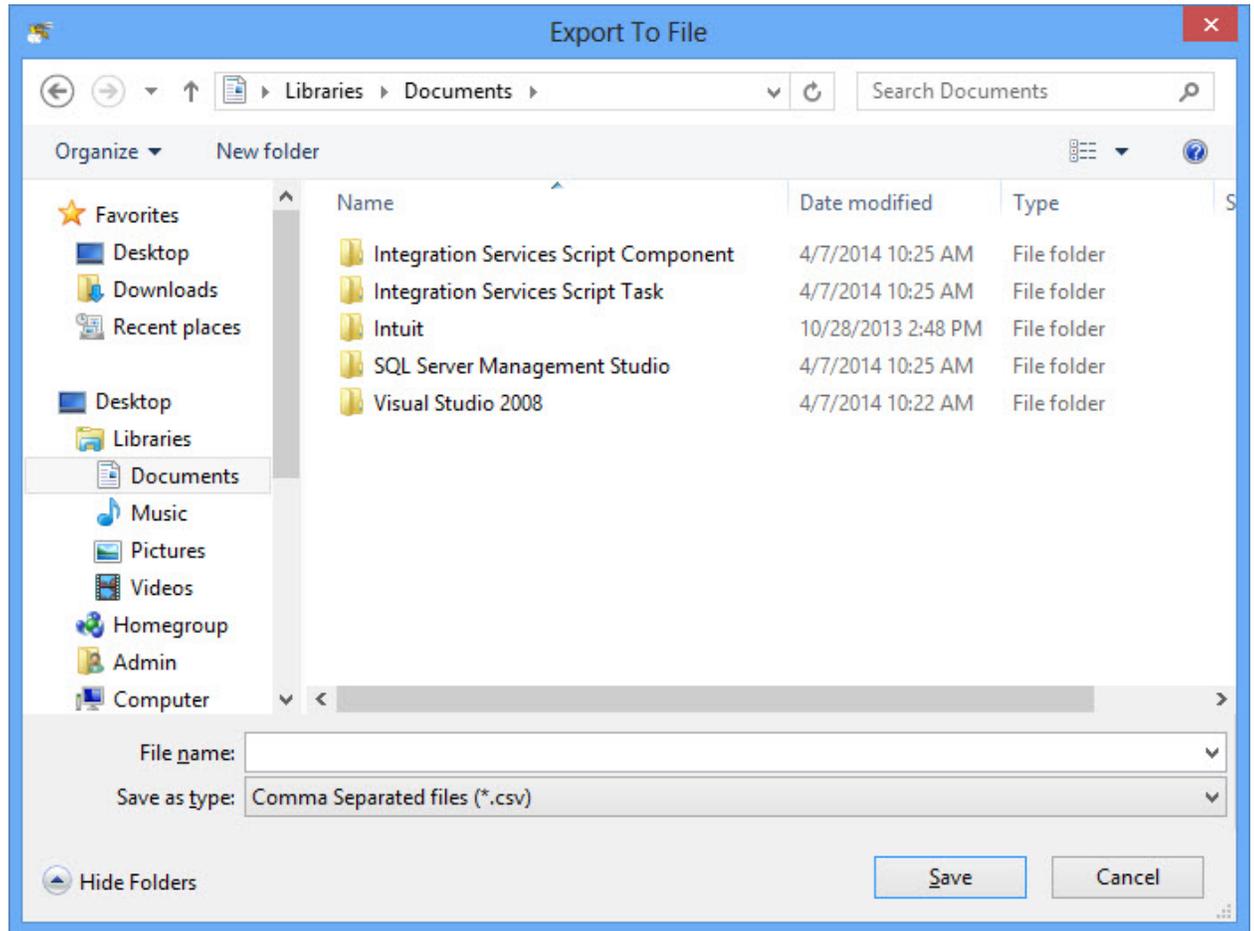
What is a comma-delimited file? This is a type of data format in which each piece of data is separated by a comma. This is a popular format for transferring data from one application to another, because most database systems are able to import and export comma-delimited data.

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. An example of the **Export** screen is shown below:



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.

Group

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:

Drag a column header here to group by that column.									
Linking	Asset Tag	Asset Description	Asset Type	Asset Type Des...	Transact As Wh...	Site	Location	Department Code	Checked Out
Has Parent	1	Example Asset	1	Example Asset T...	T	001	Sh1b2		
Has Child	1002	Monitor 17"	Monitor 17"	17" Monitor	T	Main Office	Storage Rm A	GR	
Linked Both...	4000	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4001	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4002	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4003	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	

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.

Drag a column header here to group by that column

Linking	Asset Tag	Asset Description	Asset Type	Asset Type Des...	Transact As Wh...	Site	Location	Department Code	Checked Out
Has Parent	1	Example Asset	1	Example Asset T...	T	001	Sh 1b2		
Has Child	1002	Monitor 17"	Monitor 17"	17" Monitor	T	Main Office	Storage Rm A	GR	
Linked Both...	4000	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4001	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4002	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4003	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	

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

Linking	Asset Tag	Asset Description	Asset Type	Asset Type Des...	Transact As Wh...	Site	Location	Department Code	Checked Out
Site: 001									
Has Parent	1	Example Asset	1	Example Asset T...	T	001	Sh 1b2		
Site: Main Office									
Has Child	1002	Monitor 17"	Monitor 17"	17" Monitor	T	Main Office	Storage Rm A	GR	
Linked Both...	4000	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4001	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4002	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4003	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	

- 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 Des...	Location	Transact As Wh...	Site	Department Code	Checked Out
Site: 001									
Location: Sh 1b2									
Has Parent	1	Example Asset	1	Example Asset T...	Sh 1b2	T	001		
Site: Main Office									
Location: Storage Rm A									
Has Child	1002	Monitor 17"	Monitor 17"	17" Monitor	Storage Rm A	T	Main Office	GR	
Linked Both...	4000	T61 Units	Laptop IBMThin...		Storage Rm A	T	Main Office	IT	
Not Linked	4001	T61 Units	Laptop IBMThin...		Storage Rm A	T	Main Office	IT	
Not Linked	4002	T61 Units	Laptop IBMThin...		Storage Rm A	T	Main Office	IT	
Not Linked	4003	T61 Units	Laptop IBMThin...		Storage Rm A	T	Main Office	IT	

- 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.

Linking	Asset Tag	Asset Description	Asset Type	Asset Type Des...	Location	Transact As Wh...	Site	Department Code	Checked Out
Site: Main Office									
Location: Storage Rm A									
Has Child	1002	Monitor 17"	Monitor 17"	17" Monitor	Storage Rm A	T	Main Office	GR	
Linked Both...	4000	T61 Units	Laptop IBMThin...		Storage Rm A	T	Main Office	IT	
Not Linked	4001	T61 Units	Laptop IBMThin...		Storage Rm A	T	Main Office	IT	
Not Linked	4002	T61 Units	Laptop IBMThin...		Storage Rm A	T	Main Office	IT	
Not Linked	4003	T61 Units	Laptop IBMThin...		Storage Rm A	T	Main Office	IT	
Site: 001									
Location: Sh 1b2									
Has Parent	1	Example Asset	1	Example Asset T...	Sh 1b2	T	001		

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 remove the location group by clicking on the group name and dragging it down into the column header section. Let go of your cursor anywhere in the column header section and the group disappears.

Linking	Asset Tag	Asset Description	Asset Type	Asset Type Des...	Location	Transact As Wh...	Site	Department Code	Checked
Site: Main Office									
Location: Storage Rm A									
Has Child	1002	Monitor 17"	Monitor 17"	17" Monitor	Storage Rm A	T	Main Office	GR	
Linked Both...	4000	T61 Units	Laptop IBMThin...		Storage Rm A	T	Main Office	IT	
Not Linked	4001	T61 Units	Laptop IBMThin...		Storage Rm A	T	Main Office	IT	
Not Linked	4002	T61 Units	Laptop IBMThin...		Storage Rm A	T	Main Office	IT	
Not Linked	4003	T61 Units	Laptop IBMThin...		Storage Rm A	T	Main Office	IT	
Site: 001									
Location: Sh1b2									
Has Parent	1	Example Asset	1	Example Asset T...	Sh1b2	T	001		

- 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 Des...	Transact As Wh...	Site	Location	Department Code	Checked Out
Site: 001									
Has Parent	1	Example Asset	1	Example Asset T...	T	001	Sh1b2		
Site: Main Office									
Has Child	1002	Monitor 17"	Monitor 17"	17" Monitor	T	Main Office	Storage Rm A	GR	
Linked Both...	4000	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4001	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4002	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4003	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	

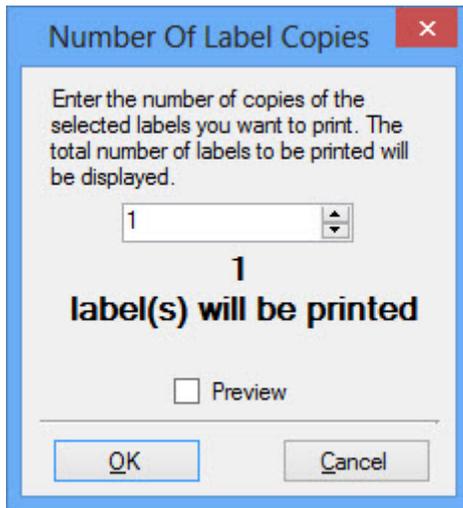
Print Tags

Print Tags/Labels/Badges - This button is available on the Asset, Employee and Location Lists. This option allows you to print barcode labels for any assets, employees, etc. selected in the list.

Note: You must select a Label Printer prior to printing tags from the List screens. To do this, see the topic [Selecting a Label Printer](#).

To Print Tags/Labels:

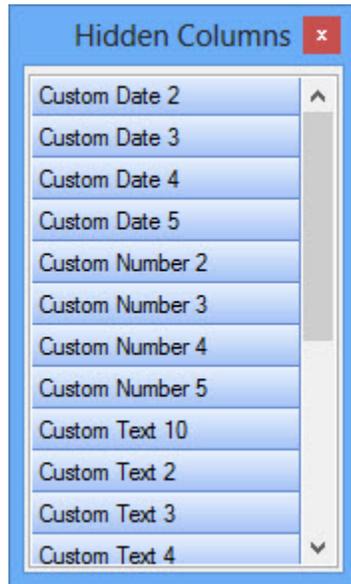
- Click the **Print Tags** button on the toolbar. The following screen will appear:



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

Show Hidden Columns

Show Hidden Columns - The list allows you to hide columns by right-clicking on a column label and selecting Hide Column. This enables you to hide information you do not usually need. You can quickly view the columns you have hidden by clicking the Show Hidden Columns button. A popup screen similar to the one below appears listing all columns that are not currently visible.



You can return these columns to the full **List** screen by clicking on a listing in the **Hidden Columns** screen and dragging it back to the column labels section on the **List** screen.

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

Views

Views - 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:

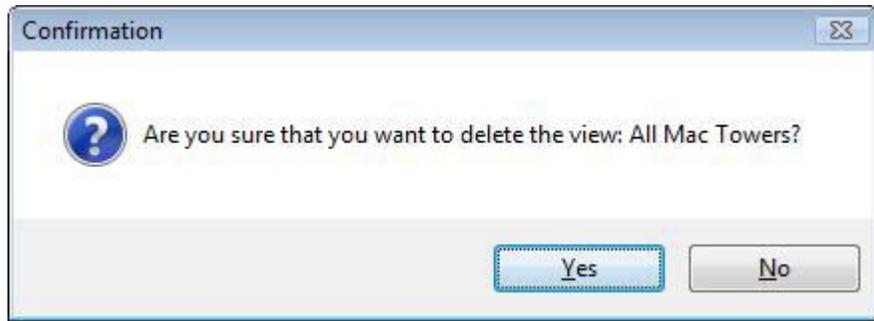


Options are:

- **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. 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:

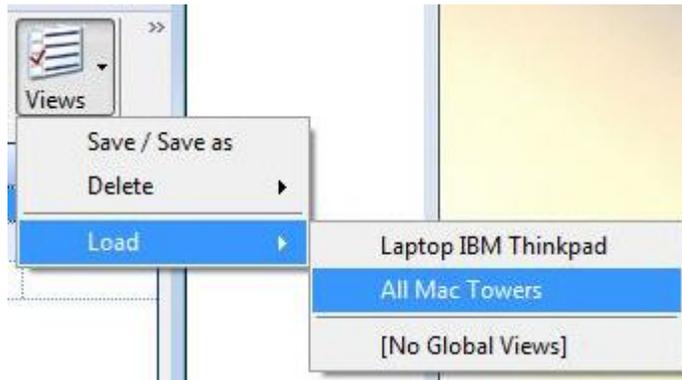


Click **Yes** on the confirmation message.

- **Load** -This option allows you to apply a saved view to the list.

To load a saved filter:

- Select **Views > Load**. A list of all saved views appears.
- Click on the view you want to apply:



- The selected view will be applied to your list.

- **Reset View Settings** - This option is found at the top of all lists. Select this option to reset all lists to their default settings. All filters, rearranged columns, group settings, etc. will be reverted to their default statuses.

Section C: Search Field



The **Search** bar allows you to enter a full or partial asset tag by which to search the database. To search enter a full or partial asset tag and press the <ENTER> key. Click the down arrow to the right of the search field to view a list of recent searches. If a matching asset tag is found, the **Edit Asset** screen will appear. If there are several matches, the **Asset List** will appear with the matching tags displayed.

Section D: Contents List

Linking	Asset Tag	Asset Description	Asset Type	Asset Type Des...	Transact As Wh...	Site	Location	Department Code	Checked Out
Has Parent	1	Example Asset	1	Example Asset T...	T	001	Sh1b2		
Has Child	1002	Monitor 17"	Monitor 17"	17" Monitor	T	Main Office	Storage Rm A	GR	
Linked Both...	4000	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4001	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4002	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	
Not Linked	4003	T61 Units	Laptop IBMThin...		T	Main Office	Storage Rm A	IT	

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
001
001
001
002
002

Selecting a Listing: The list screens can display up to 1000 lines of information at a time (for information on setting the row limit, [click here](#)). You can quickly scroll through the listings, or view columns that are hidden from view by using the buttons directly below the contents list. Keep in mind that you can also use the **Display Hidden Columns** button to view columns that are normally hidden (see Section A: Toolbars, 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 Tag 4002, 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 one time by holding down the **Ctrl** and clicking the listings with your mouse. Multi-select can be used for Deleting items, the Mass Update feature and Maintenance.

Arranging Columns: You can arrange the columns in the list into any order you wish. To change the order, click on a column heading and drag it somewhere else on the list. For example, if you want to make Site the first column in your Asset List, click on the Site column heading and drag it to the first column in the list as shown below:

Drag a column header here to group by that column.							
Linking	Site	Tag	Asset Description	Location	Site	Asset Type	Asse
Has Parent		1	Example Asset	Sh1b2	001	1	Exam
Has Child		1002	Monitor 17"	Storage Rm A	Main Office	Monitor 17"	17" I
Linked Both...		4000	T61 Units	Storage Rm A	Main Office	Laptop IBMThin...	
Not Linked		4001	T61 Units	Storage Rm A	Main Office	Laptop IBMThin...	
Not Linked		4002	T61 Units	Storage Rm A	Main Office	Laptop IBMThin...	
Not Linked		4003	T61 Units	Storage Rm A	Main Office	Laptop IBMThin...	

After you drop the column into its new position, the list will reorganize with the Site information appearing first:

Site	Linking	Asset Tag	Asset Descri
001	Has Parent	1	Example Ass
Main Office	Has Child	1002	Monitor 17"
Main Office	Linked Both...	4000	T61 Units
Main Office	Not Linked	4001	T61 Units
Main Office	Not Linked	4002	T61 Units
Main Office	Not Linked	4003	T61 Units

Section E: Buttons and 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

MobileAsset 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:



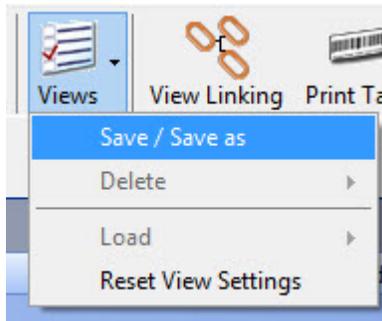
These features allow you to sort, group and hide columns in the list. Any changes you make to the list via this menu will be retained when the screen is closed and re-opened.

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.

2.9.2 Asset List

The **Asset List**, accessed from the **Main** screen by selecting **List Forms > 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**.

The screenshot shows the 'Asset List' application window. The window title is 'Asset List'. The interface includes a toolbar with various actions like Filter, Toggle, New, Edit, Dispose, Duplicate, Mass Update, Check In, Check Out, Move, Maintenance, Print, Export, Group, Hidden, Views, View Linking, and Print Tags. Below the toolbar is a search bar. The main area contains a table with the following columns: Linking, Asset Tag, Asset Description, Asset Type, Asset Type Des..., Transact As Wh..., Site, and Location. The table lists several assets, with the second row (Asset Tag 1002) highlighted. To the right of the table, there is a vertical pane showing 'Asset : 1002' and an 'Example Number Field' with the value '1,456'. At the bottom of the window, there is a 'Record: 2 Of 6' indicator and a 'Viewing: Active Assets' status bar.

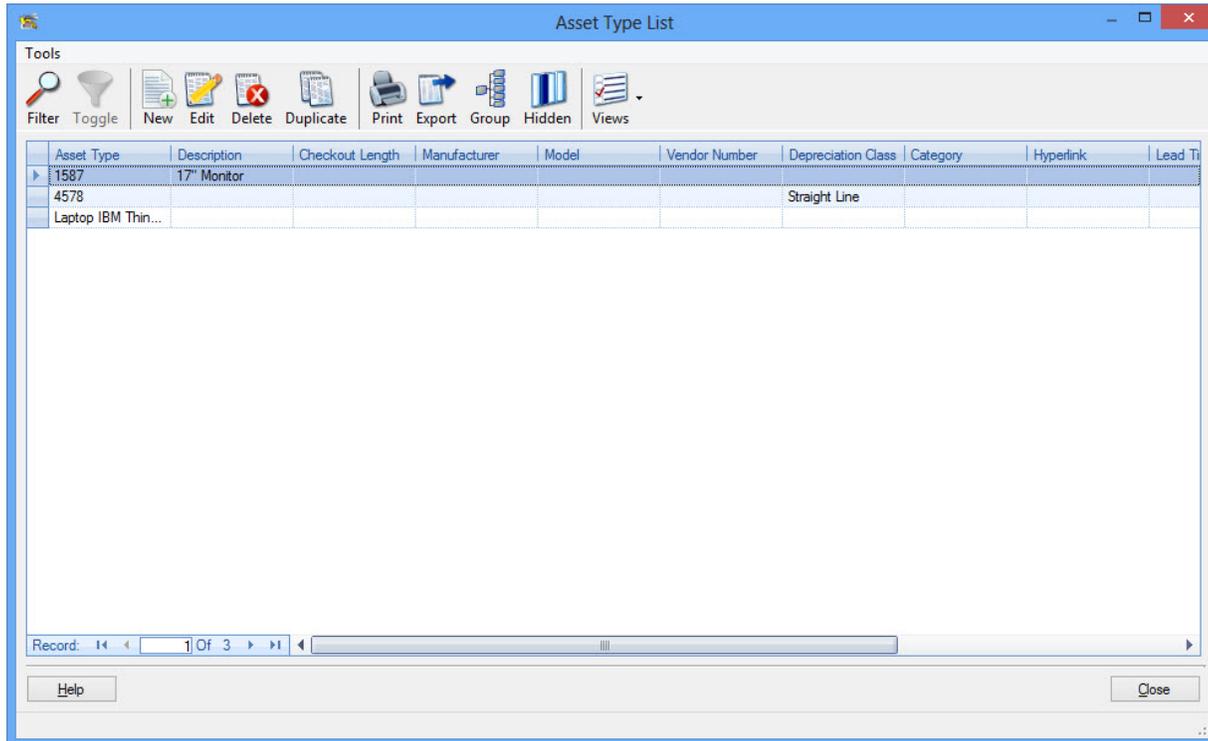
Linking	Asset Tag	Asset Description	Asset Type	Asset Type Des...	Transact As Wh...	Site	Location
Not Linked	1	17" Monitor	1587	17" Monitor	T	001	001
Not Linked	1002	Monitor 17"	4578		T	Main Office	Storage Rm A
Not Linked	4000	T61 Units	Laptop IBM Thin...		T	Main Office	Storage Rm A
Not Linked	4001	Laptop IBM Thin...	Laptop IBM Thin...		T	Main Office	Storage Rm A
Not Linked	4002	Laptop IBM Thin...	Laptop IBM Thin...		T	Main Office	Storage Rm A
Not Linked	4003	Laptop IBM Thin...	Laptop IBM Thin...		T	Main Office	Storage Rm A

Notice that in the example above, the highlighted asset has a **Dynamic Custom Field** associated with it. The **Dynamic Custom Field** and its value appear in the window on the right side of the screen.

2.9.3 Asset Type List

The **Asset Type List**, accessed from the **Main** screen 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. For detailed information on working with list screens, please see [Working with Lists](#).

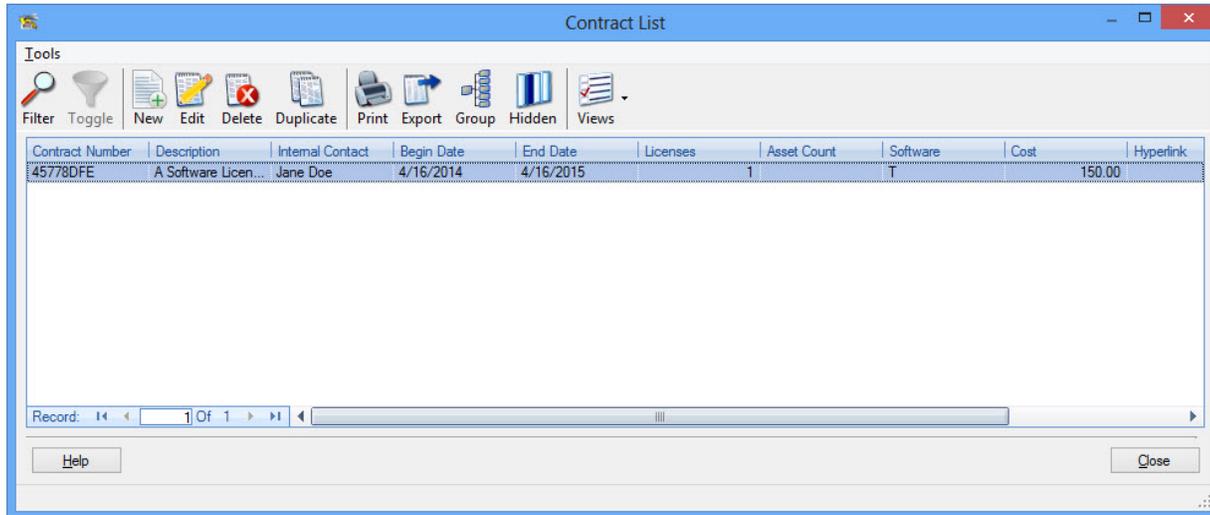
Below is an example of the **Asset Type List**.



2.9.4 Contracts List

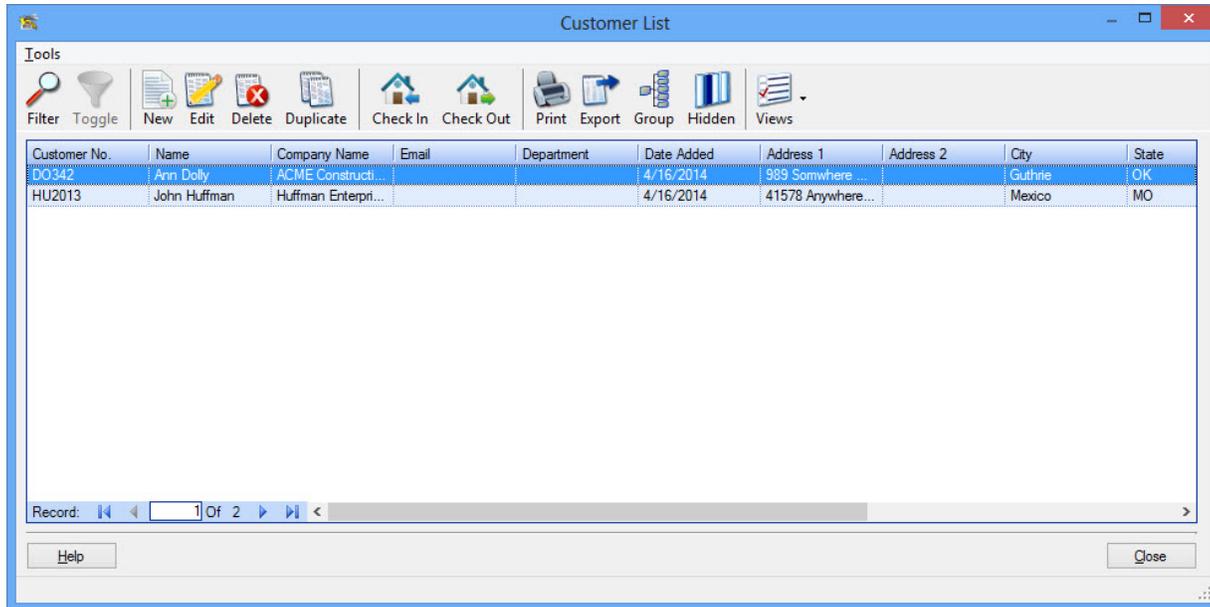
The **Contracts/Licenses** feature is only available in the Professional and Enterprise editions of MobileAsset.

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



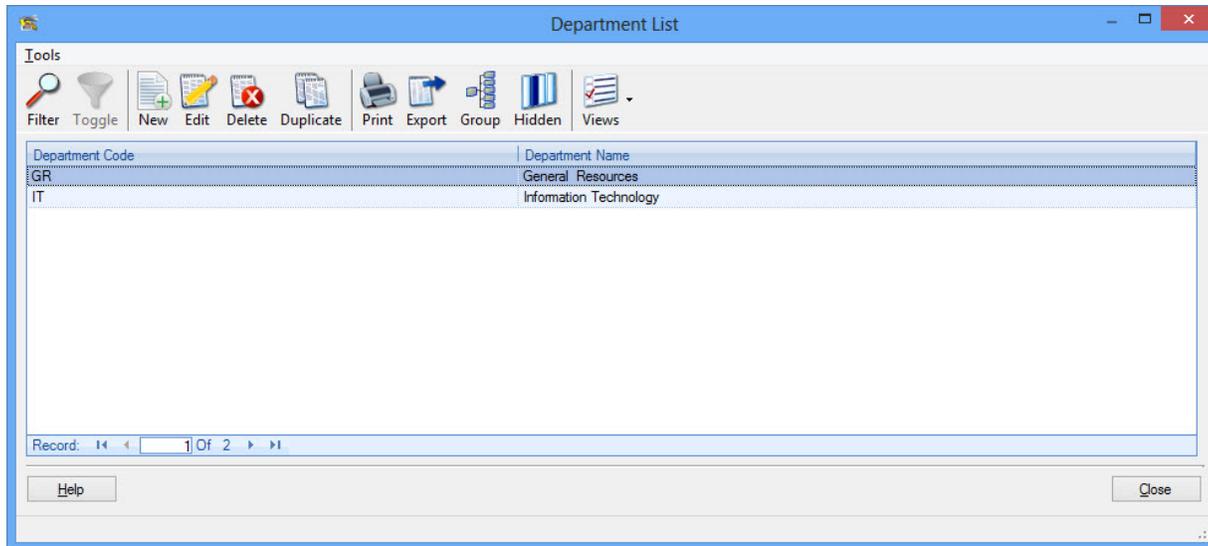
2.9.5 Customer List

The **Customer List**, accessed from the **Main** screen 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**.



2.9.6 Department List

The **Department List**, accessed from the **Main** screen 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.



2.9.7 Depreciation Class List

The **Depreciation Class List**, accessed from the **Main** screen 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 Me...	Custom Percent...	Asset Life Years	Asset Life Months	Fully depreciate t...
Double Declining Balance	Double Declining...	0.00	11	0	T
Straight Line	Straight-Line	0.00	10	0	F

Record: 1 Of 2

Help Close

2.9.8 Employee List

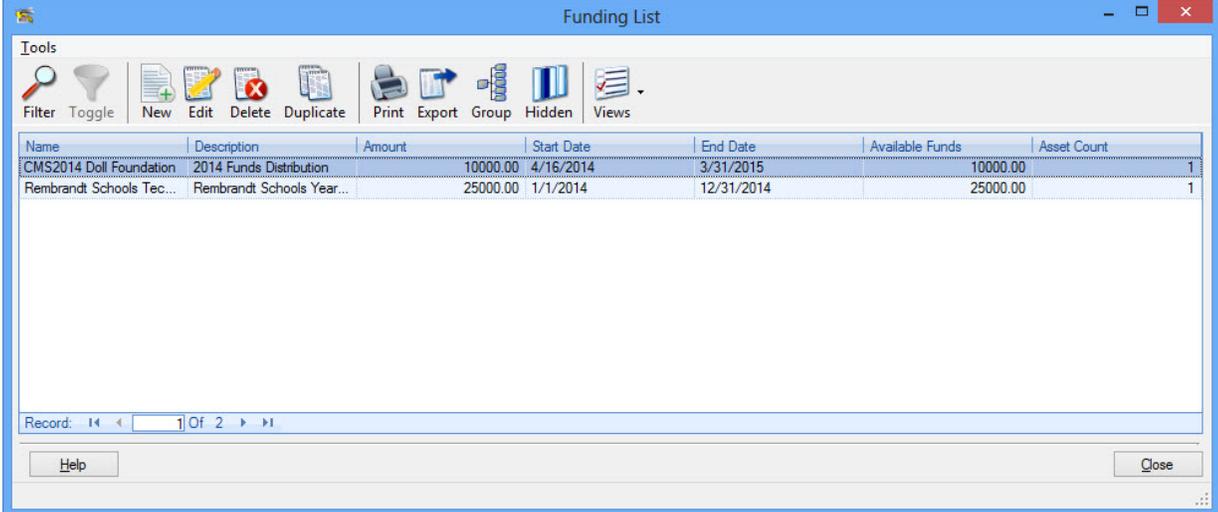
The **Employee List**, accessed from the **Main** screen by selecting **List Forms > Employees**, allows you view employees you have already setup and to create new or modify existing employees. For detailed information on working with list screens, please see [Working with Lists](#). Below is an example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

Employee No	Last Name	First Name	Department	Manager No	Phone	Ext	Title	Email	Address 1
0112	Hodkins	Ralph	IT		555-555-5555				
4789	Greensport	Paula	GR		555-555-5555		Supervisor		

2.9.9 Funding List

Funding is only available in the Professional and Enterprise editions of MobileAsset.

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



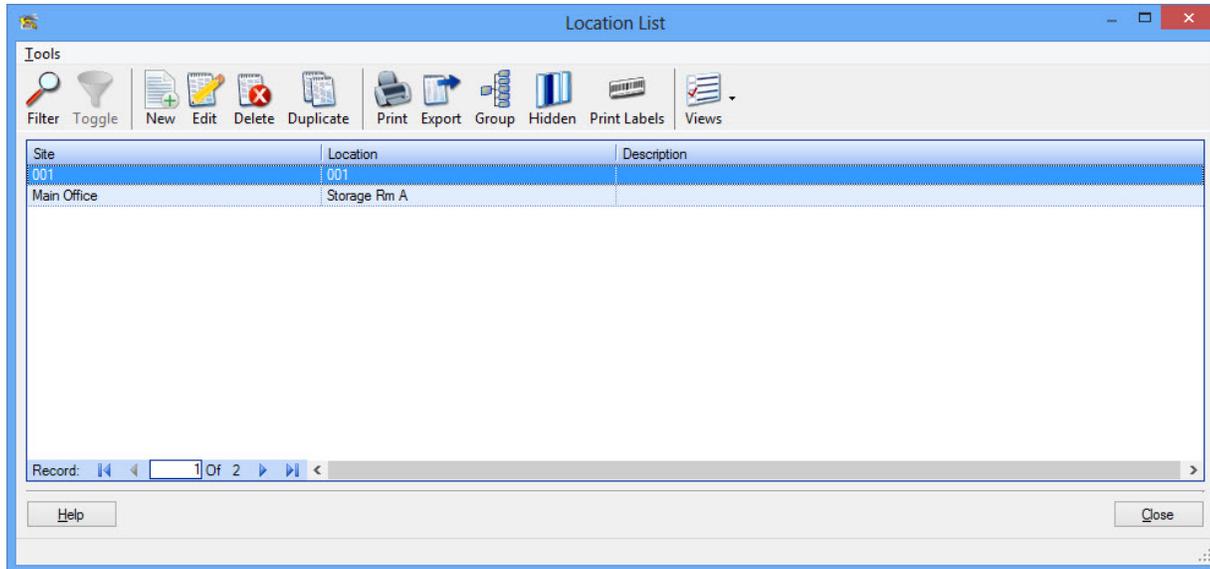
Name	Description	Amount	Start Date	End Date	Available Funds	Asset Count
CMS2014 Doll Foundation	2014 Funds Distribution	10000.00	4/16/2014	3/31/2015	10000.00	1
Rembrandt Schools Tec...	Rembrandt Schools Year...	25000.00	1/1/2014	12/31/2014	25000.00	1

Record: 1 Of 2

Help Close

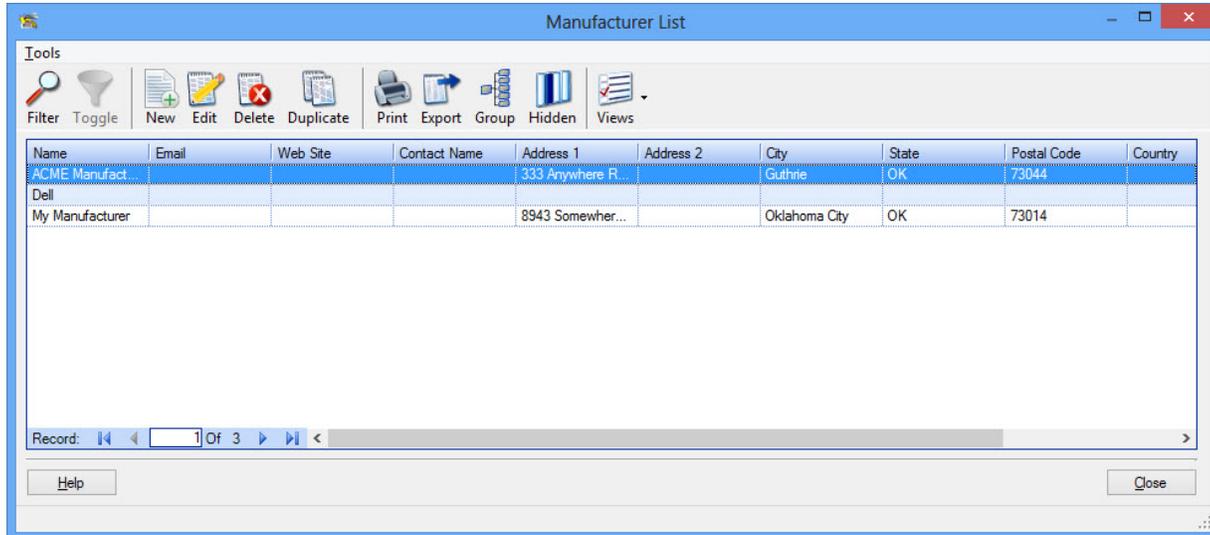
2.9.10 Location List

The **Location List**, accessed from the **Main** screen 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.



2.9.11 Manufacturer List

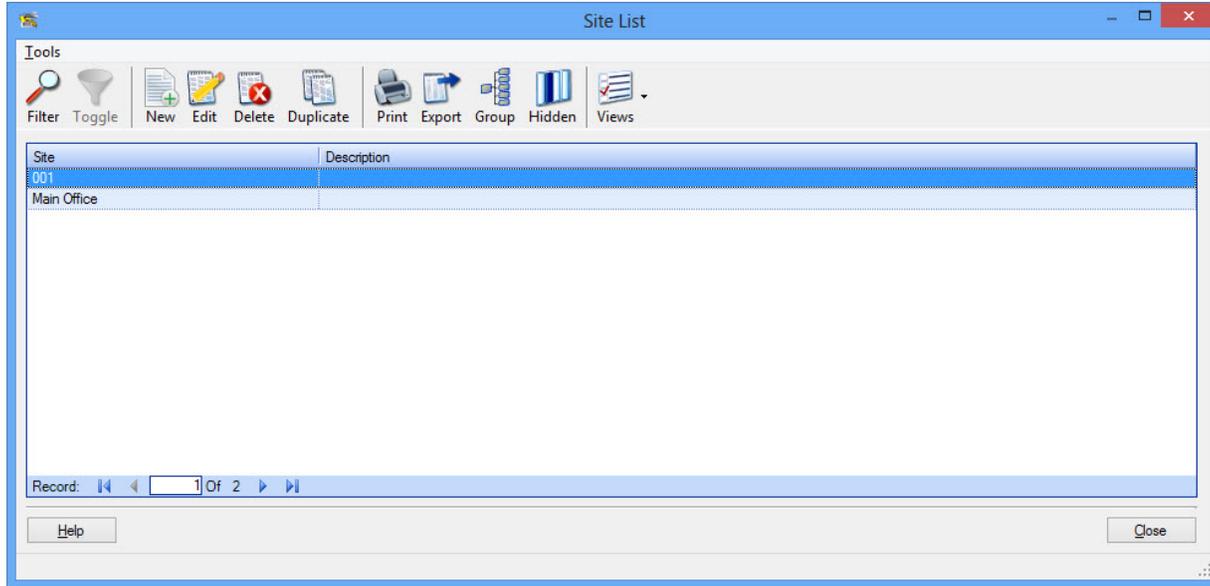
The **Manufacturer List**, accessed from the **Main** screen by selecting **List Forms > Manufacturers** allows you view Manufacturers you have already setup and to create new or modify existing manufacturers. For detailed information on working with list screens, please see [Working with Lists](#).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



Name	Email	Web Site	Contact Name	Address 1	Address 2	City	State	Postal Code	Country
AGM Manufact...				333 Anywhere R...		Guthrie	OK	73044	
Dell				8943 Somewher...		Oklahoma City	OK	73014	
My Manufacturer									

2.9.12 Site List

The **Site List**, accessed from the **Main** screen 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.



2.9.13 Transaction List

The **Transaction List** displays all transactions completed in MobileAsset. For detailed information on working with list screens, please see [Working with Lists](#).

Below is an example of the **Transaction List**:

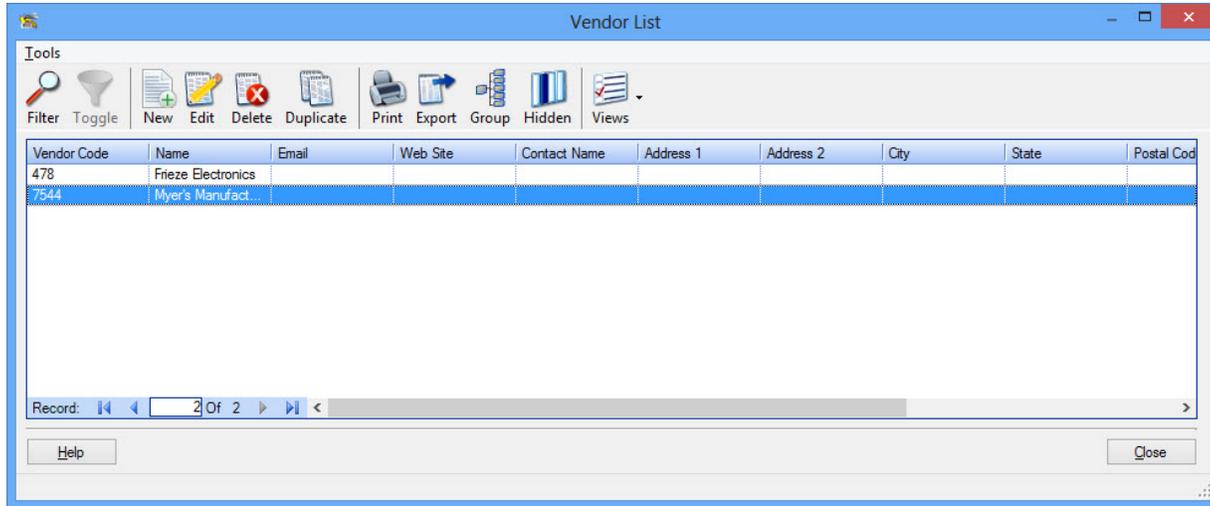
Trans Date	Trans Type	Asset Tag	Department	Location	Site	Other Location	Other Site	Reason	Ent
4/9/2014	Check In	4003	IT	Storage Rm A	Main Office				4/5
4/9/2014	Check In	1546	GR	Shlf6 Bin7	Bldg 2				4/5
4/9/2014	Check In	4000	IT	Storage Rm A	Main Office				4/5
4/9/2014	Check In	1002	GR	Storage Rm A	Main Office				4/5
4/9/2014	Check In	1		Sh1b2	001				4/5
4/9/2014	Check Out	1002	GR	Storage Rm A	Main Office				4/5
4/9/2014	Check Out	4003	IT	Storage Rm A	Main Office				4/5
4/9/2014	Check In	4001	IT	Storage Rm A	Main Office				4/5
4/9/2014	Check Out	4001	IT	Storage Rm A	Main Office				4/5
4/9/2014	Check In	4000	IT	Storage Rm A	Main Office				4/5
4/9/2014	Check In	1002	GR	Storage Rm A	Main Office				4/5
4/9/2014	Check Out	4002	IT	Storage Rm A	Main Office				4/5
4/9/2014	Move To	1002	GR	Shl5 bin3	Bldg 2	Storage Rm A	Main Office		4/5
4/9/2014	Move From	1002	GR	Storage Rm A	Main Office	Shl5 bin3	Bldg 2		4/5
4/9/2014	Check In	4001	IT	Storage Rm A	Main Office				4/5

Note: If a **Maintenance** transaction is selected, the **Signature** icon will change to **"Pictures"**. Click the **Pictures** icon to view any pictures taken of the asset during that maintenance transaction.

Note: You can re-print the check out/check in receipt created on a mobile device by highlighting the check out/check in transaction, then clicking the Reprint Receipt button.

2.9.14 Vendor List

The **Vendor List**, accessed from the **Main** screen 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.



2.10 Asset Management

2.10.1 Create New Asset

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

Note: Most screenshots in this Help file are of the Professional version of MobileAsset. Not all features/tabs shown in these screens are available in the Standard version of MobileAsset.

Note for Mobile Device Users: Assets can also be added on a [Windows Mobile/CE](#), [iOS](#) (Professional and Enterprise Only) or [Android](#) (Professional and Enterprise Only) mobile device.

The following topics are discussed in this section:

[Accessing the New Asset Screen](#)

[General Tab](#)

[Asset Linking Tab](#)

[Depreciation Tab](#)

[Picture Tab](#)

[Attachments Tab](#)

[Maintenance Tab](#)

[Contracts Tab](#) - Professional and Enterprise Editions Only

[Funding Tab](#) - Professional and Enterprise Editions Only

[Transaction History Tab](#)

[Custom Fields Tab](#)

[Dynamic Custom Fields](#)

Accessing the New Asset Screen

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

This feature can also be accessed from the **Asset List** by clicking the **New** button on the toolbar. [For more information on using the list screens, click here.](#)

The **New Asset** screen is broken into several tabs. Use the following links to jump ahead to the tab of interest:

[General](#), [Asset Linking](#) (Professional and Enterprise Editions), [Depreciation](#), [Attachments](#), [Picture](#), [Maintenance](#), [Contracts](#) (Professional and Enterprise Editions), [Funding](#) (Professional and Enterprise Editions), [Transaction History](#), [Custom Fields](#), [Dynamic Custom Fields](#)

New Asset Screen > General Tab

The screenshot shows the 'New Asset' window with the 'General' tab selected. The 'Asset Tag' field is empty. The 'Asset Description' field is empty. The 'Site' field is a dropdown menu. The 'Location' field is a dropdown menu. The 'Department Code' field is a dropdown menu. The 'Serial No.' field is a text input. The 'Condition' field is a dropdown menu. The 'Hyperlink' field is a text input with a pushpin icon. The 'Additional Info' field is a text area. The 'Asset Type' field is a dropdown menu. The 'Asset Type Description' field is a text input. The 'Manufacturer' field is a dropdown menu. The 'Model' field is a text input. The 'Vendor Number' field is a dropdown menu. The 'Check Out Length' field is a spinner with '0 days', '0 hrs', and '0 min' options, and a 'No Due Date' checkbox. The 'Check Out Lead Time' field is a spinner with '0 days', '0 hrs', and '0 min' options. The 'Reminder Lead Time' field is a spinner with '0 days', '0 hrs', and '0 min' options, and a 'No Reminder' checkbox. The 'Depreciation Class' field is a text input. The 'Category' field is a text input. At the bottom, there is a 'Help' button, a 'Pin All' icon, a 'Print Tag On Save - Copies:' spinner set to '0', and 'Save' and 'Close' buttons.

Note: If the [Automatic Asset Tags](#) function is turned on (**Administration > Options**), the **Asset Tag** field will appear as follows:

The screenshot shows the 'New Asset' window with the 'General' tab selected. The 'Asset Tag' field is populated with the text 'Automatically assigned'. The 'Asset Description' field is empty. The 'Site' field is a dropdown menu. The 'Location' field is a dropdown menu. The 'Department Code' field is a dropdown menu. The 'Serial No.' field is a text input. The 'Condition' field is a dropdown menu. The 'Hyperlink' field is a text input with a pushpin icon. The 'Additional Info' field is a text area. The 'Asset Type' field is a dropdown menu. The 'Asset Type Description' field is a text input. The 'Manufacturer' field is a dropdown menu. The 'Model' field is a text input. The 'Vendor Number' field is a dropdown menu. The 'Check Out Length' field is a spinner with '0 days', '0 hrs', and '0 min' options, and a 'No Due Date' checkbox. The 'Check Out Lead Time' field is a spinner with '0 days', '0 hrs', and '0 min' options. The 'Reminder Lead Time' field is a spinner with '0 days', '0 hrs', and '0 min' options, and a 'No Reminder' checkbox. The 'Depreciation Class' field is a text input. The 'Category' field is a text input. At the bottom, there is a 'Help' button, a 'Pin All' icon, a 'Print Tag On Save - Copies:' spinner set to '0', and 'Save' and 'Close' buttons.

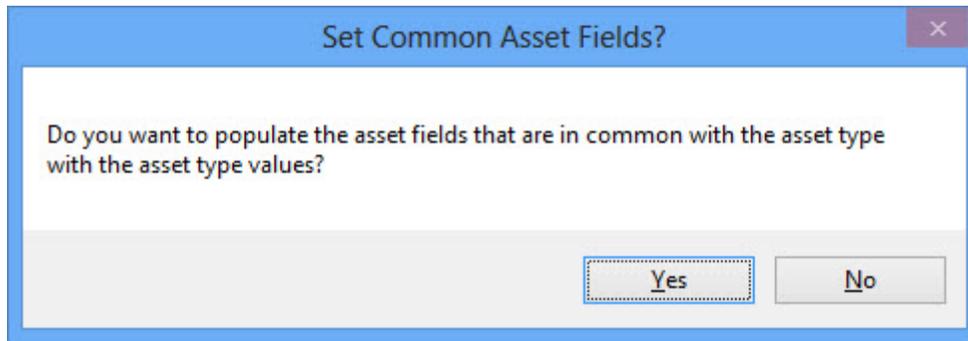
You may notice that some fields on this and other tabs have a Pin icon in front of them. These fields represent data that can be "pinned". **Pinning** allows you to "lock" the information entered into a field. This is convenient if, for example, you are entering multiple new assets for a particular site 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. Fields are **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.

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

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

If you have enabled the [Edit Inherited Asset Type Data](#) option on the **Options** screen, the message screen below will appear when you select the Asset Type and you can make changes to the information that is populated from the [Asset Type](#). These fields include the [Manufacturer, Model, Vendor Number, Check Out Length, Check Out Lead Time and Reminder Lead Time](#). Any changes made to these fields apply to the current asset only. (If this option is not enabled, these fields will be disabled and you will not be able to make changes.)



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

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. You can set the asset to have no due date by leaving the values in the **Check Out Length** fields at 0.

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

- 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.

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

New Asset Screen > Asset Linking Tab

Asset Linking is only available in the Professional and Enterprise editions of MobileAsset. Asset Linking 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 with the following elements:

- Checkboxes: Transact as Whole - Select this checkbox to indicate that this asset and all of its child assets should be audited/checked-out/checked-in etc., as a group.
- Parent Asset: A dropdown menu that is currently empty.
- Child Asset(s): A large empty rectangular area for listing child assets.
- Buttons: 'Link' and 'Unlink' buttons located at the bottom right of the form.

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.

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:

The screenshot shows the 'Asset Linking' tab with the following elements:

- Checkboxes: Transact as Whole - Select this checkbox to indicate that this asset and all of its child assets should be audited/checked-out/checked-in etc., as a group.
- Parent Asset: A dropdown menu containing the value '1002'.
- Child Asset(s): A rectangular area containing the text '--- 1 - Example Asset Tag'.
- Buttons: 'Link' and 'Unlink' buttons located at the bottom right of the form.

In this example, Asset 1002 is the parent of the current asset and asset 1 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 check box. Deselecting it on the **Edit Asset > Asset Linking** tab for the child asset 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 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.

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 software 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.

4. You can unlink child assets by highlighting the asset in the **Child Assets** list and clicking the **Unlink** button.
5. Click **Save** if you are done entering information for this asset or click another tab to proceed with entering more information.

New Asset Screen > 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 screenshot shows the 'Depreciation' tab of the MobileAsset software. The 'Depreciate Asset' checkbox is unchecked, and a message indicates that assets of this type cannot be depreciated. The form contains several input fields for depreciation-related data, including purchase order, dates, costs, and values. A 'Class Info' box is also visible, showing the depreciation method and life span.

1. The **Asset Tag** value entered on the **General** tab will be displayed at the top, but can still be edited, if desired.
2. Click the **Depreciate Asset** check box if you want the software to calculate depreciation. The **Depreciate Asset** check box 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"**.

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.](#)

A **Purchase Cost** should also be entered here if you plan to use the [Funding](#) feature to track this asset. You will need the purchase cost here in order to record this debit from the funding source.

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.

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

New Asset Screen > 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, click on the picture area to add a picture.

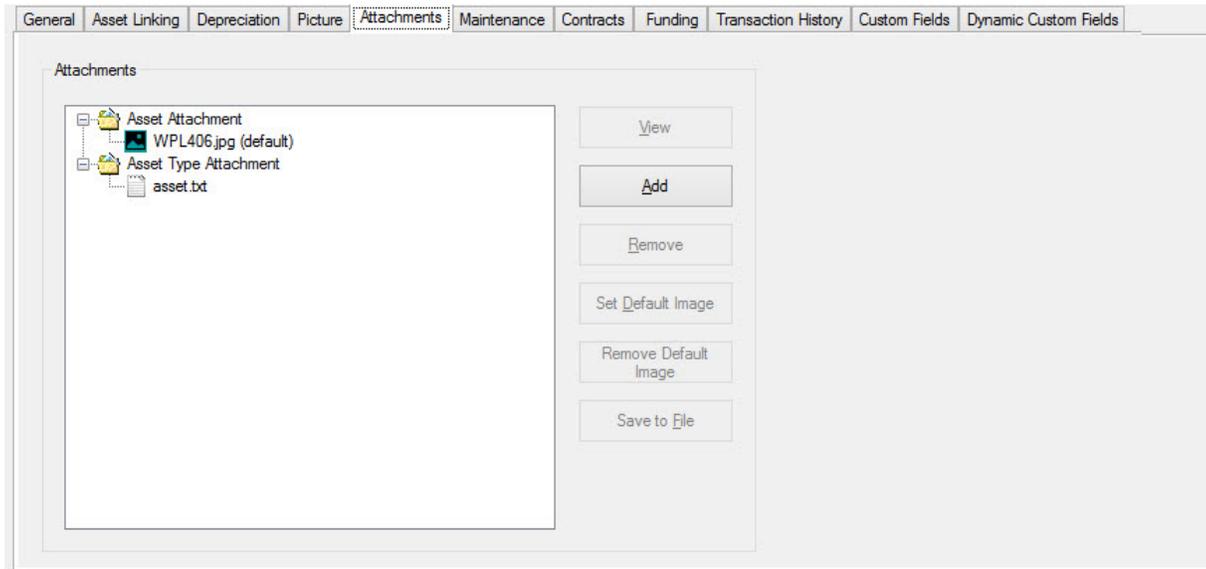
The current default picture is always displayed on the **Picture** tab. Right click the image to see the popup **Picture** menu. This menu allows you to **Add** (a new) **Image** or to **Select** (a previously added) **Image**. Any image you select for display will become the new default image.

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.

- Image files are not actually added to the database until the **Save** 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 Screen > Attachments Tab

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



- 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.

- 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.
- 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 MobileAsset'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 Create New Asset Type for further information](#)).

- Attachments are not actually added to the database until the **Save** 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 Screen > 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:

The screenshot shows the 'Maintenance' tab selected in a software interface. The 'Warranty' section is active, displaying input fields for 'Begin:', 'End:', and 'Provider:'. Below these fields is a large empty text area. At the bottom of the tab are buttons for 'New', 'Edit', 'Delete', and 'Show History'.

Entering Warranty Information

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

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

The screenshot shows the 'Warranty' section with the 'Begin' field set to 11/7/2009. A calendar pop-up is displayed for November 2009, with the 7th highlighted. Red arrows point to the left and right navigation arrows of the calendar. A text box on the right says "Click on the arrows to scroll through the months".

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

Today: 11/7/2009

You can also click on the Month/Year 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.

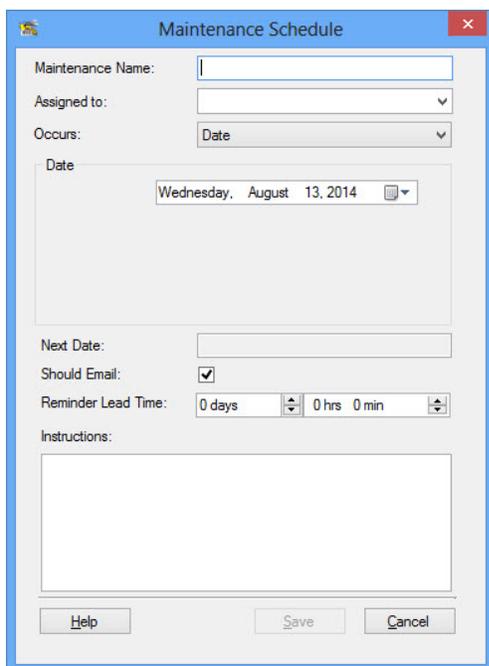
Entering New Maintenance Schedules

To enter a new maintenance schedule

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



The **Maintenance Schedule** screen appears:



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 entered into the MobileAsset database 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.

Occurs: Date

Date: Monday, August 24, 2009

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.

- **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).

Occurs: Daily

Daily

Maint Start: Monday, August 24, 2009

Every 10 day(s)

Next Date: Monday, August 24, 2009

In this example, maintenance would be performed every 10 days beginning Monday, August 24, 2009.

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 or 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.

Occurs: Weekly

Weekly

Maint Start: Monday, August 24, 2009

Every 1 week(s) on:

Sun Mon Tue Wed

Thu Fri Sat

Next Date: Friday, August 28, 2009

In this example, maintenance will be performed every week on Fridays beginning the week of Monday, August 24, 2009.

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, August 28, 2009.

- **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:

The screenshot shows a configuration window for a maintenance schedule. At the top, 'Occurs:' is set to 'Monthly'. Below this, the 'Monthly' section is expanded. 'Maint Start:' is set to 'Monday, August 24, 2009'. There are two radio button options for frequency: 'Day' (selected) and an empty dropdown. The 'Day' option is set to '1' and 'of every 1 month(s)'. The 'Next Date:' at the bottom is 'Tuesday, September 01, 2009'.

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

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:

The screenshot shows a configuration window for a maintenance schedule. At the top, 'Occurs:' is set to 'Monthly'. Below this, the 'Monthly' section is expanded. 'Maint Start:' is set to 'Monday, August 24, 2009'. There are two radio button options for frequency: 'Day' (unselected) and '1st' (selected). The '1st' option is set to 'Thursday' and 'of every 1 month(s)'. The 'Next Date:' at the bottom is 'Thursday, September 03, 2009'.

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. Select **Should Email** if you want an email reminder sent when the next maintenance date is due. The email will be sent to the recipients indicated on the Options screen. For more information on setting these options, please refer to the topic [Reminder Alert Options](#).

6. if you select the **Should Email** checkbox, enter the number of days and/or hours/mins prior to the due date you want the email to be sent in the Reminder Lead Time fields.
7. Enter any special instructions in the **Instructions** text field.
8. Click **Save** when you are done entering information for this maintenance schedule. The schedule will appear in the list on the **Maintenance** tab:

Description	Occurs	Next Date	Assigned to
Battery Replacement	Monthly	4/1/2014	

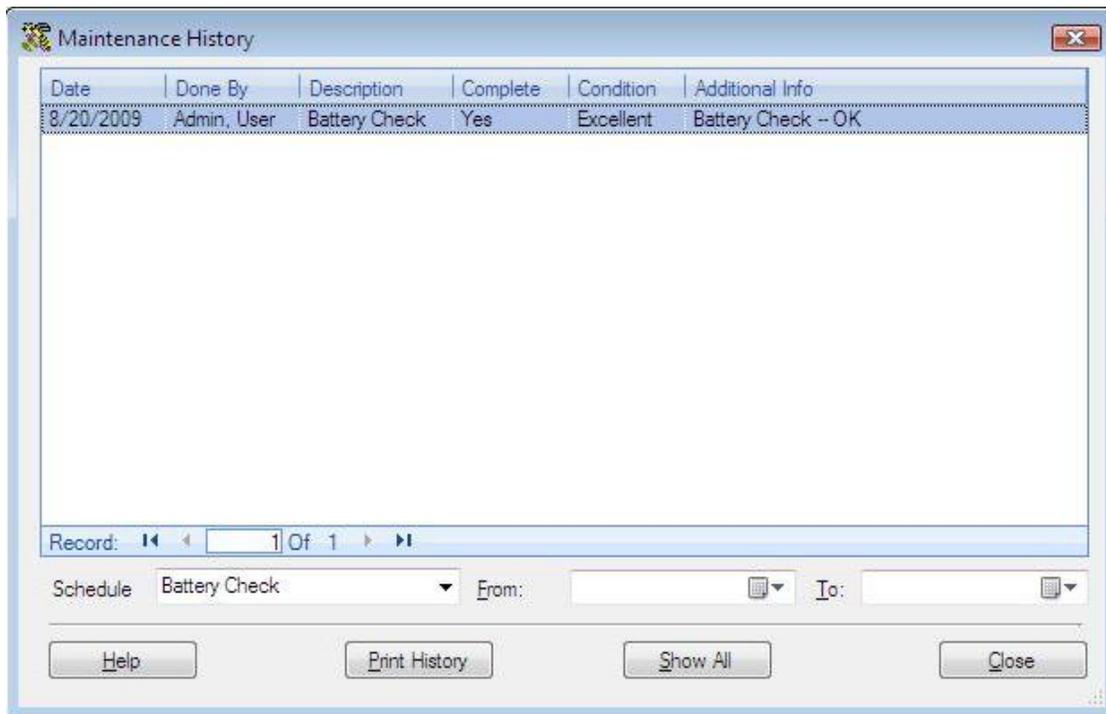
Editing Existing Maintenance Schedules

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:



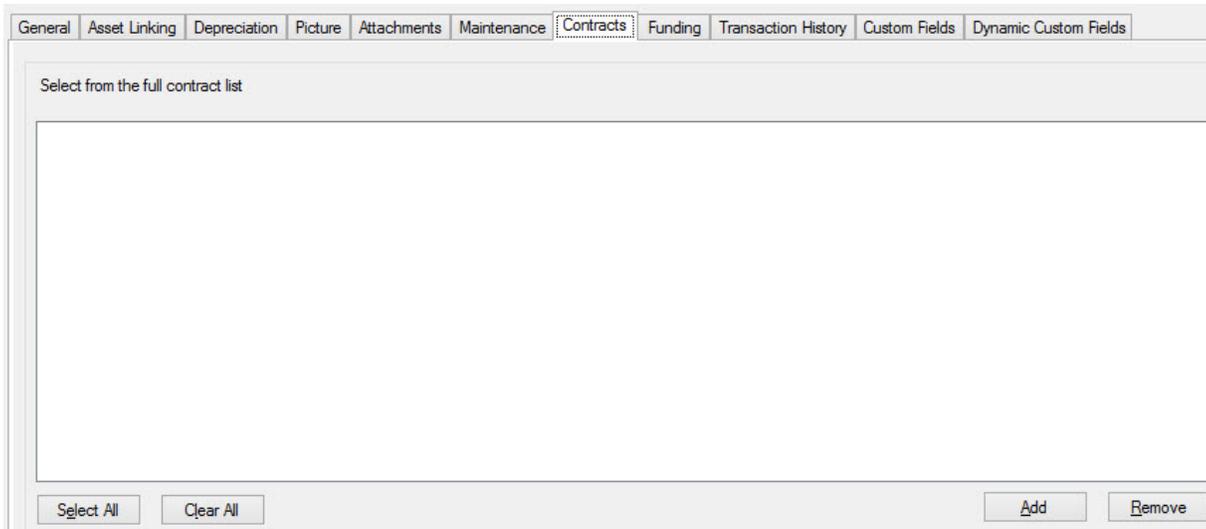
2. When you first access this screen, all maintenance entries associated with the selected maintenance schedule are displayed. You can change the selected schedule using the **Schedule** drop down menu. You can also enter **From** and **To** dates to further filter the list.

Click the **Show All** button to remove the filter.

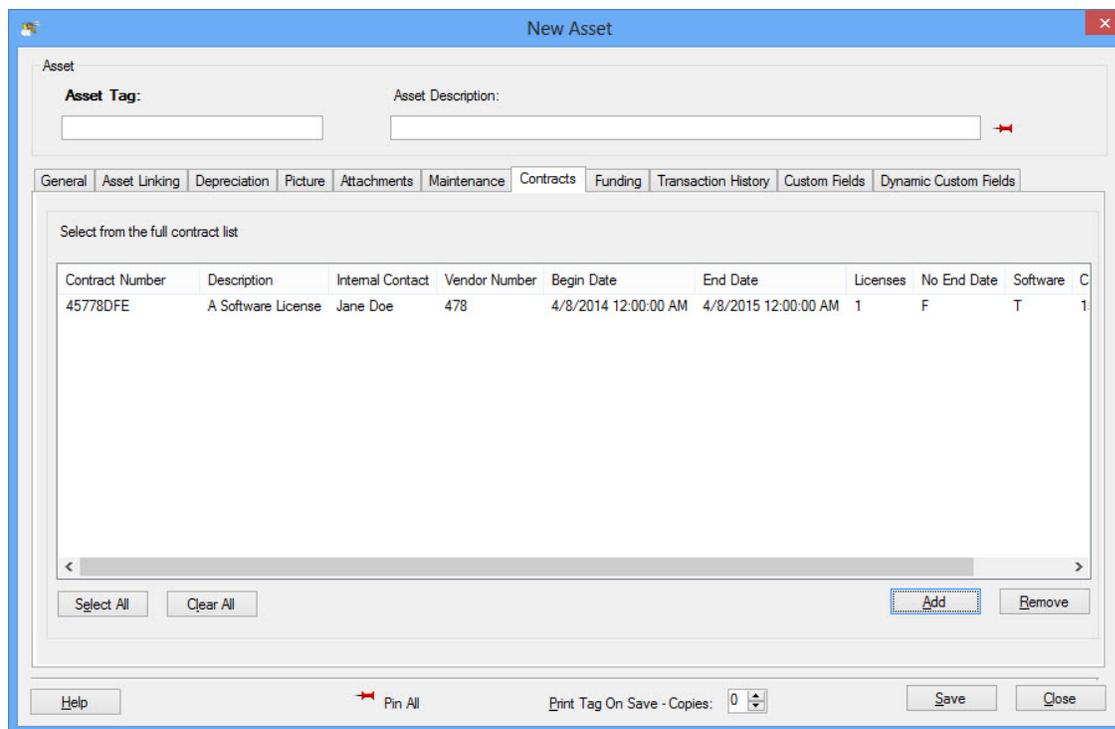
Select the **Print History** button to print a list of the displayed maintenance entries.

New Asset Screen > Contracts Tab

The **Contracts** tab is only available in the Professional and Enterprise editions of MobileAsset. 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(s) 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 **Save** if you are done entering information for this asset or click the next tab to proceed with entering more information

New Asset Screen - Funding

The **Funding** tab is only available in the Professional and Enterprise editions of MobileAsset. The **Funding** tab allows you to keep track of any grants or funding sources for your assets. Below is an example of the **Funding** tab:

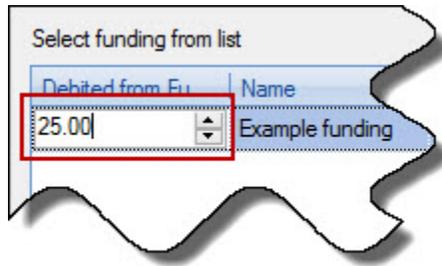
To associate a funding source with this asset:

1. Click the **Add** button at the bottom of the tab. The **Funding List** appears.
2. Highlight the desired funding source, then click the **Select** button to add it to this asset. **Note:** You can also create a new funding source from the **Funding List** by clicking the **New** button.

The selected funding source will appear on the **Funding** tab.

Debited from Fu...	Name	Description	Amount	Start Date	End Date	Available Funds	Asset Count
0.00	CMS2014 Doll F...	2014 Funds Distr...	10000.00	4/1/2014	5/1/2014	10000.00	0

3. The **Debited from Fund** field in the list is editable. You can click on this field to enter the amount of funds used. The **Available Funds** column will update by subtracting the debited amount. Please note that the amount entered here must be less than the **Purchase Cost** entered on the [New/Edit Asset screen > Depreciation](#) tab.



New Asset Screen > 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.).

Time	Type	Action	User Name
------	------	--------	-----------

Print Transactions

1. Click **Print Transactions** to send a list of the transactions for this asset to the printer.
 2. Click **Save** if you are done entering information for this asset or click another tab to proceed with entering more information.
-

New Asset Screen > Custom Fields Tab

The screenshot displays the 'Custom Fields' tab within the 'New Asset Screen'. The tab is part of a multi-tabbed interface with other tabs like 'General', 'Asset Linking', 'Depreciation', 'Picture', 'Attachments', 'Maintenance', 'Contracts', 'Funding', 'Transaction History', and 'Dynamic Custom Fields'. The 'Custom Fields' tab is active and contains three sections:

- Strings:** A label 'New Custom Field Example:' followed by a dropdown menu showing 'Example Data' and a red 'X' icon.
- Numbers:** A label 'Example Custom Number:' followed by a text input field and a red 'X' icon.
- Dates:** A label 'Example Custom Date:' followed by a date picker and a red 'X' icon.

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 **Save** button is clicked.

New Asset Screen > Dynamic Custom Fields

Dynamic Custom Fields are customized text, date and/or number fields that you create on Asset Types. The field(s) will appear on the Dynamic Custom Field tab of any assets that are assigned to that asset type. These fields differ from regular custom fields in that you can set them to be associated with a specific asset type, multiple asset types that you select or on all asset types. You can also create a tooltip for each field to provide users with information on what data should be entered. Dynamic Custom Fields can be searched via the [Search](#) screens or the [Search field on the Main screen](#). In addition, Dynamic Custom Fields can be edited via the [Mass Update](#) function.

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

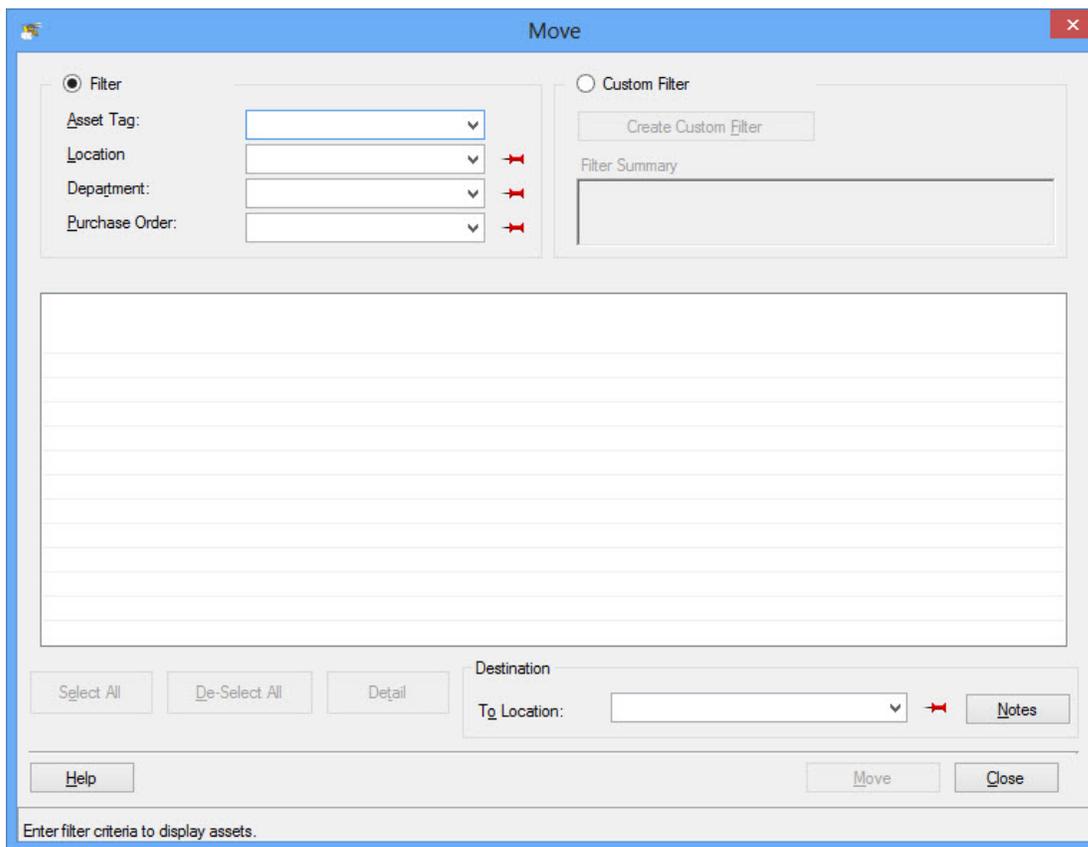
2.10.2 Move Asset

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

Note for Mobile Device Users: **Move Asset** can also be done on a [Windows Mobile/CE](#), [Android](#) (Pro and Ent only) and [iOS](#) (Pro and Ent only) devices.

1. To access this function, from the **Main** screen select **Asset Management > Move**. The **Move** screen shown below 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, click here.](#)



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.

Custom Filter may be selected instead of Filter. This makes use of the [Simple Find](#) or [Advanced Find](#) forms to select the Assets you want to move.

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 move. To multi-select, hold down the CTRL key while clicking on assets with your mouse.

The **Select All** button can be used to select 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 the highlighted record, to view or modify the Asset record prior to moving it. If more than one record is selected, the **Detail** button will be disabled.

The **Notes** button allows you to enter [Notes](#) on the record.

- 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**, or **<New>** to enter a new Location.

In the example below, assets were filtered only by Location, then only the last two Assets listed at that Location were selected for the Move to the specified To Location.

Move

Filter Custom Filter

Asset Tag:

Location:

Department:

Purchase Order:

Create Custom Filter

Filter Summary:

Asset Tag	Asset Type	Item Description	Site	Location	Department Code	Checked Out	Serial No	Condition	Manufa
<input type="checkbox"/>	222	Printer	Bldg 1	Sebastian's Office		F			
<input type="checkbox"/>	234	Printer	Bldg 1	Sebastian's Office	MA	F			
<input checked="" type="checkbox"/>	3456	Printer	Bldg 1	Sebastian's Office		F			
<input checked="" type="checkbox"/>	456	Printer	Bldg 1	Sebastian's Office		F			

Select All De-Select All Detail

Destination
To Location:

Help

Enter filter criteria to display assets.

- 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.

Check Out Asset

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.

You can also check out assets on a [Windows Mobile/CE](#), [Android \(Pro and Ent only\)](#) and [iOS \(Pro and Ent only\)](#) devices.

1. To access this function, from the **Main** screen 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**.

Note: *Pinning can be used with Check Out 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 may be selected instead of Filter. This makes use of the [Simple Find](#) or [Advanced Find](#) screens to select the assets you want to Check Out.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

3. 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 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 checking out the asset(s). 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. Note that if an asset has the due date set to '0' in the **Edit Asset** screen, the asset does not have a due date. If the asset selected in the **Pending Check Out** window does not have a due date 'No Due Date' will appear in the **Due Date** field.

Assets pending Check-Out

Asset Tag	Asset Type	Asset Type Description	Asset De
1487	Dell 4322	Dell Laptop	Dell Lapt

Notes Remove Remove All

Customer
 Employee

Change Location To:

Due Date
 Use each asset's checkout duration (Select a pending asset to see its due date)
 9/21/2009 1:30:07 PM
 None (Each asset has no due date)
 Custom (Each asset gets the due date below)
 9/21/2009 1:22:39 PM

0 Check-Out Close

- **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.

2.10.3 Check In Asset

The **Check In Asset** function is used to check in assets that are currently checked out to a Customer or Employee.

Note for Mobile Device Users: Assets can also be checked in directly on a [Windows Mobile/CE](#), [Android \(Professional and Enterprise Editions\)](#) and [iOS \(Professional and Enterprise Editions\)](#) devices.

- 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.](#)

- Select the asset or assets you want to check in. Asset selection can be done by specifying an **Asset Tag**, a **Customer** or an **Employee**. If an Asset Tag is supplied, the **Checked Out To** window will display the Customer or Employee information recorded at the time of Check Out.

Note: Pinning can be used with Check In transactions. *What is 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.

3. 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 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 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.

4. 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.
5. 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 doing a Check In.

2.11.4 Transferring Checked Out Assets

The Transfer Check Out function allows you to transfer physical possession of a checked out item from one person to another. 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** screen, click **Asset Management > Transfer Check Out**. The **Transfer Check Out** screen 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 can be used with **Transfer** 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 may be selected instead of Filter. This makes use of the [Simple Find](#) or [Advanced Find](#) forms 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 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 ready to transfer check out** list. All the listed assets can be shifted to the **Assets ready to transfer 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.

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 No.** or an **Employee No.** and a **Due Date** (and time).

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

4. When the required fields have been satisfied, the **Transfer Check Out** button will be enabled. Click this button to post the transaction or click the **Close** button to exit without transferring the asset.

2.11.5 Audit Assets

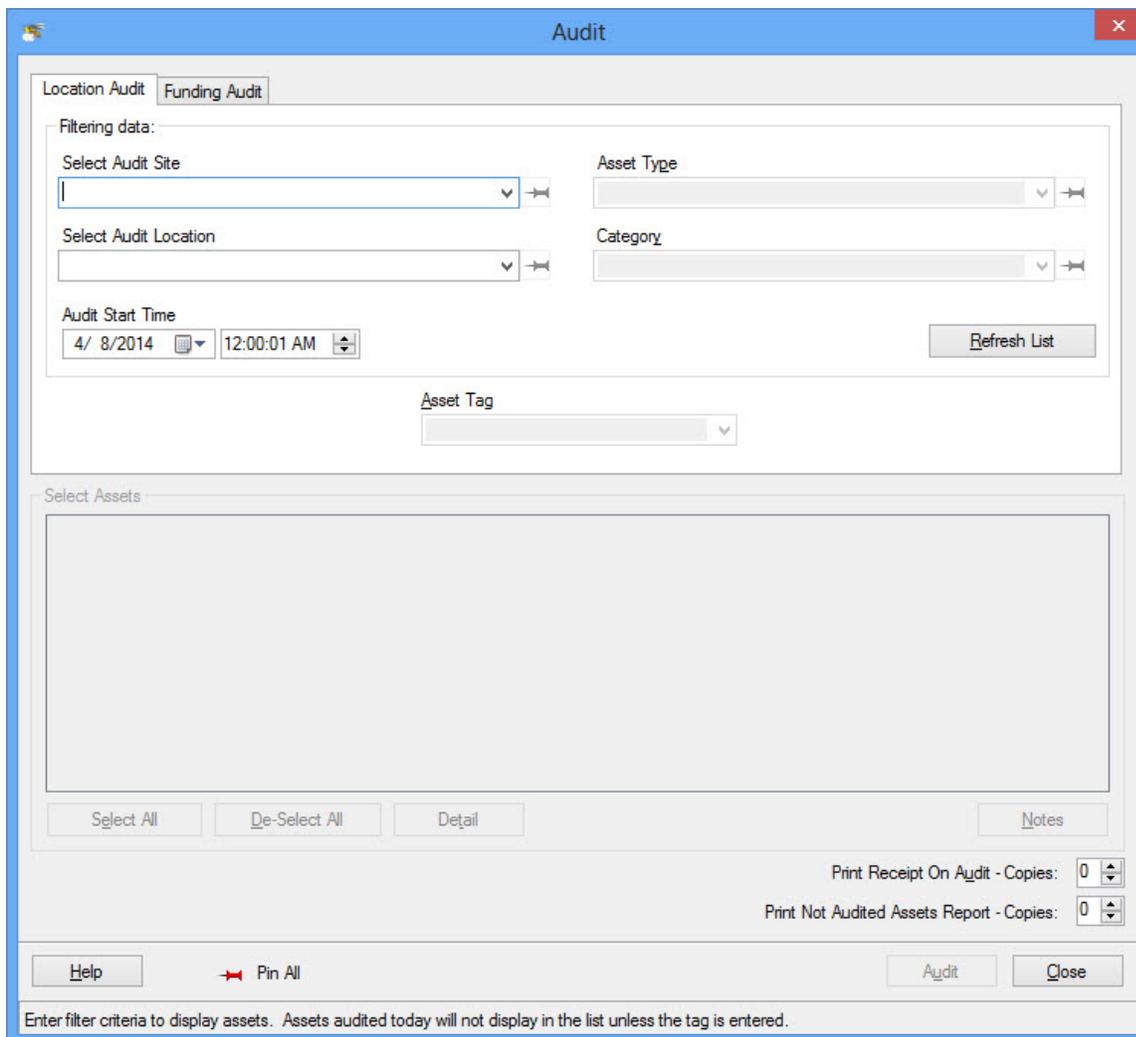
The **Audit** function is used to determine the current location of your assets. With this function, you can verify that your assets are in the locations to which they are assigned.

[Location Audit](#)

[Funding Audit](#) (Professional and Enterprise Editions Only)

Location Audit

- To access the **Audit** screen from the **Main** screen, select **Asset Management > Audit**.



- The **Filter** section allows you to quickly select which assets you wish to audit. Select the desired audit Site and Location.
- Set an **Audit Start Time**. This feature allows you to stop and restart an audit without auditing the same inventory twice by telling MobileAsset to only include those assets that were not audited prior to the entered start date and time. For example, if you begin an audit on November 6, but had to stop at midnight and the audit was not

completed, you can enter 11/7/2014 at 12am to begin the new audit. This means that only items that have not been audited as of 12am on November 7 will be included in this audit.

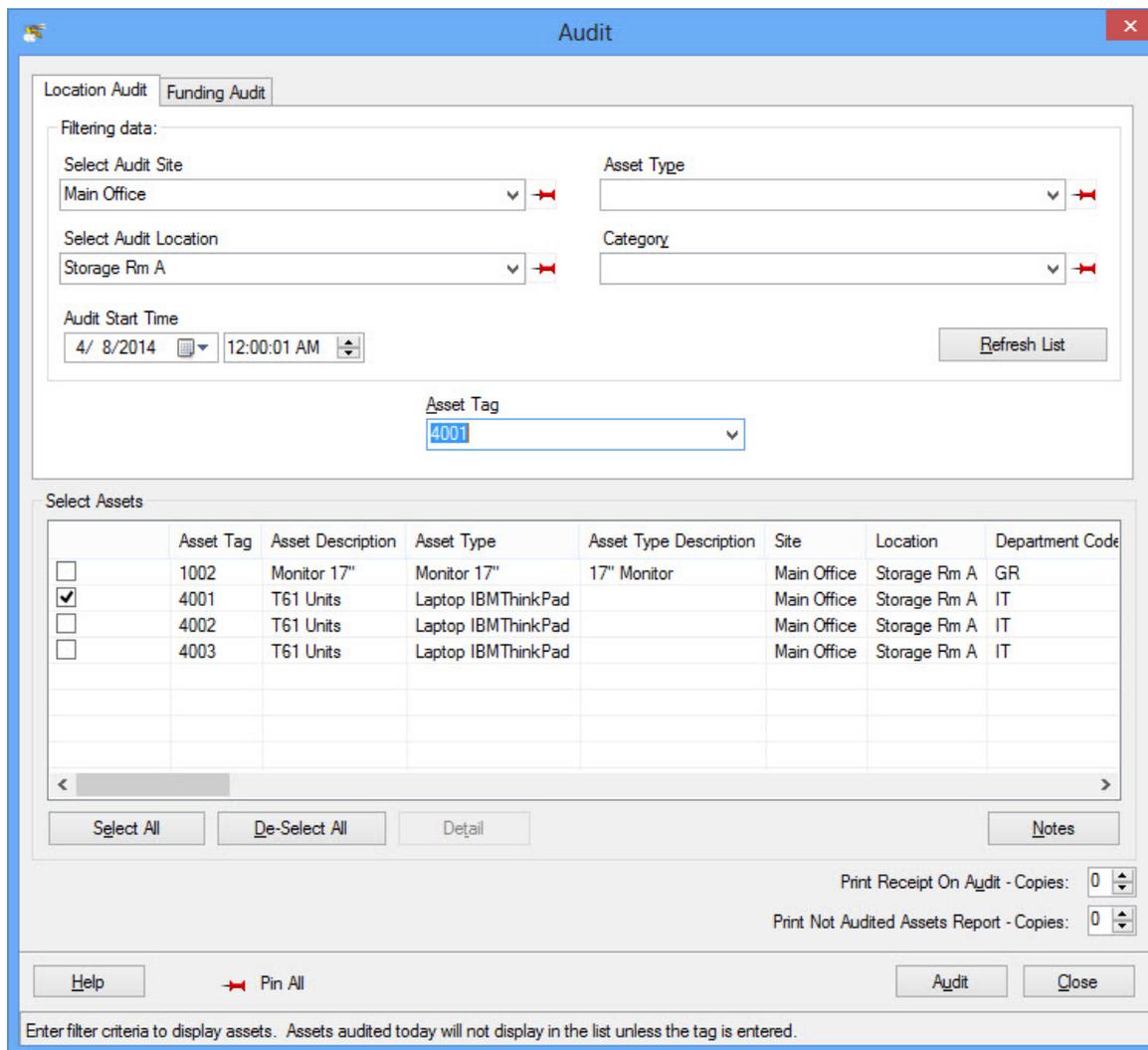
- After the site and location are selected, you can further define your asset search by entering a Department, Category or specific Asset Tag.

Note: Pinning can be used with **Audit** 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.

- After applying your choice of filter criteria, a list of assets matching your criteria appears in the **Selected Assets** list.

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.

If you want to edit an asset in the **Selected Assets** list, highlight the listing, then click the **Detail** button. If more than one record is highlighted or no assets are selected, the **Detail** button will be disabled.



The screenshot shows the 'Audit' application window. At the top, there are tabs for 'Location Audit' and 'Funding Audit'. Below these are 'Filtering data:' fields: 'Select Audit Site' (Main Office), 'Select Audit Location' (Storage Rm A), 'Asset Type' (empty), and 'Category' (empty). The 'Audit Start Time' is set to 4/ 8/2014 at 12:00:01 AM. A 'Refresh List' button is present. Below the filters is an 'Asset Tag' dropdown menu with '4001' selected. The main area is titled 'Select Assets' and contains a table with columns: Asset Tag, Asset Description, Asset Type, Asset Type Description, Site, Location, and Department Code. The table lists four assets, with the second one (Asset Tag 4001) selected. At the bottom of the table are buttons for 'Select All', 'De-Select All', 'Detail', and 'Notes'. Below the table are two spinner controls for 'Print Receipt On Audit - Copies' and 'Print Not Audited Assets Report - Copies', both set to 0. At the very bottom are 'Help', 'Pin All', 'Audit', and 'Close' buttons. A footer note reads: 'Enter filter criteria to display assets. Assets audited today will not display in the list unless the tag is entered.'

	Asset Tag	Asset Description	Asset Type	Asset Type Description	Site	Location	Department Code
<input type="checkbox"/>	1002	Monitor 17"	Monitor 17"	17" Monitor	Main Office	Storage Rm A	GR
<input checked="" type="checkbox"/>	4001	T61 Units	Laptop IBMThinkPad		Main Office	Storage Rm A	IT
<input type="checkbox"/>	4002	T61 Units	Laptop IBMThinkPad		Main Office	Storage Rm A	IT
<input type="checkbox"/>	4003	T61 Units	Laptop IBMThinkPad		Main Office	Storage Rm A	IT

Note: Assets being audited to a location different than the one on record will display a special icon, as shown below:

Select Assets									
	Asset Tag	Asset Description	Asset Type	Asset Type Description	Site	Location	Department Code	Checked Out	Serial No
<input checked="" type="checkbox"/>	4001	T61 Units	Laptop I...		M...	Storag...	IT		

Note on Linked Assets (**Linking is available in the Enterprise and Professional Editions only**): Special rules apply when auditing linked assets. If the **Transact as Whole** flag has been selected for the parent of this asset (on the **Edit Asset>Linking** tab), then *ALL* assets linked to this asset will be audited. If this flag is not selected, the single asset will be audited. [See the Create New Asset topic for more information.](#)

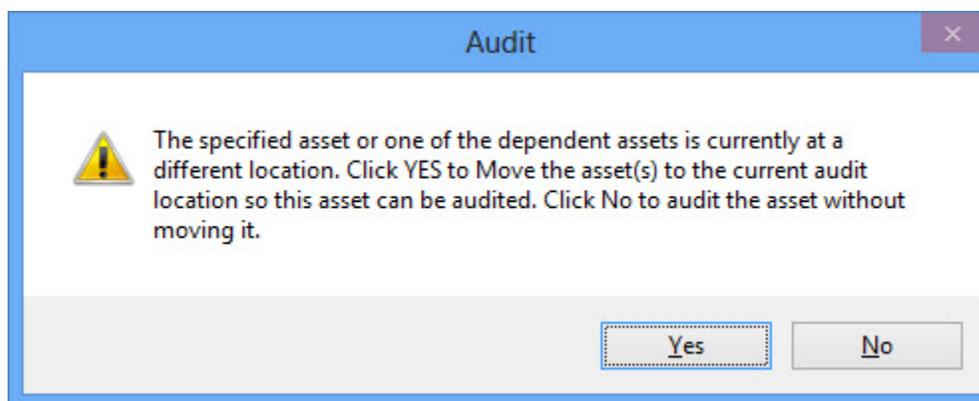
- When you are satisfied with the assets in the **Selected Assets** list, you can optionally apply [Notes](#) to the transaction.
- You can print a receipt for each audited asset by entering the desired number of receipts in the **Print Receipts - Copies** field. Keep in mind that if you enter 3 in this field, for example, 3 audit receipts will print for each asset audited.

You can also print the **Not Audited Assets Report** by entering the number of copies you would like in the **Print Not Audited Assets Report - Copies** field.

- When you are ready to audit the assets, select the check box next to the assets you want to audit, or click **Select All**, and click the **Audit** button. The **Audit** button will not be enabled until you select at least one asset. After you select the **Audit** button, the audited assets will disappear from the **Selected Assets** list.

When the required fields have been completed, the **Audit** button will be enabled. Click it to post the transaction or click the **Close** button to exit without doing an Audit.

- If at the location being audited, an asset is found that wasn't recorded in the MobileAsset database, a message will appear giving you the option to relocate the asset to the location you are currently auditing, then auditing it or leaving the asset in its current location and auditing it. Keep in mind that whether you move the asset to the current location or leave it where it is, the asset will be audited. An example of this message is shown below:



- If an asset is missing at the location being audited and you have discontinued all efforts to find it, you can perform a [Dispose](#) transaction. 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.

Funding Audit

The **Funding Audit Function** is available in the **Enterprise and Professional Editions**. The **Funding Audit** function allows you to audit those assets associated with a funding source.

1. To access the **Audit** screen from the **Main** screen, select **Asset Management > Audit**.
2. From the **Audit** screen, select the **Funding Audit** tab.

The screenshot shows the 'Funding Audit' tab selected in a window. Below the tab are two sections: 'Filtering data:' and 'Asset Tag'. The 'Filtering data:' section contains four dropdown menus: 'Funding Name', 'Audit Time', 'Select Audit Site', and 'Select Audit Location'. Each dropdown menu has a right-pointing arrow icon. A 'Refresh List' button is located to the right of the 'Select Audit Location' dropdown. Below the 'Filtering data:' section is the 'Asset Tag' dropdown menu, which also has a right-pointing arrow icon.

3. The **Filter** section allows you to quickly select which assets you wish to audit. Select the desired audit **Funding Name** and/or **Site** and **Location**.
4. Select an **Audit Start Time**. You can select from recent audits from the drop down list or set a new time. This feature allows you to stop and restart an audit without auditing the same inventory twice by telling MobileAsset to only include those assets that were not audited prior to the entered start date and time. For example, if you begin an audit on November 6, but had to stop at midnight and the audit was not completed, you can enter 11/7/2014 at 12am to begin the new audit. This means that only items that have not been audited as of 12am on November 7 will be included in this audit.
5. After applying your choice of filter criteria, a list of assets matching your criteria appears in the **Selected Assets** list.

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.

If you want to edit an asset in the **Selected Assets** list, highlight the listing, then click the **Detail** button. If more than one record is highlighted or no assets are selected, the **Detail** button will be disabled.

Complete steps 5 - 7 from the [Location Audit](#) section above to complete the audit.

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](#) screen for a highlighted record, to view or modify the Asset record prior to doing the Dispose. 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.

2.11.7 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.

- To access this screen, from the **Main** screen, select **Asset Management > Maintenance Entry**.

OR

From the **Main** screen, 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 screen will appear populated with the selected Asset's information and any scheduled maintenance.

- The **Maintenance Entry** screen offers two modes of Asset selection - **Filter** and **Custom Filter**.

Filter is the default selection mode, allowing 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** 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 may be selected instead of Filter. This makes use of the [Simple Find](#) or [Advanced Find](#) forms to select the Assets for which you want to record a Maintenance Entry.

- 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.

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 [Edit Asset](#) screen for a highlighted record. You can view or modify the Asset record prior to recording the Maintenance Entry. If more than one record is selected, the **Detail** button will be disabled.

- 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**.
- 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.
 - To setup descriptions, click the ... button above the **Description of Maintenance** field. The **Maintenance Selection** screen appears:

The screenshot shows a dialog box titled "Maintenance Selection". It features a table with two columns: "Maintenance Short Name" and "Description". The table contains two entries: "Battery Check" and "Refurb", each with an unchecked checkbox to its left. Below the table are three buttons: "New", "Edit", and "Delete". Underneath these is a "Details" section with a large, empty text area and a vertical scrollbar. At the bottom of the dialog are five buttons: "Help", "OK", "Cancel", "Apply", and "Discard".

- 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:

Maintenance Selection

Maintenance Selection

Maintenance Short Name Description

- Battery Check
- Refurb
- [Redacted]

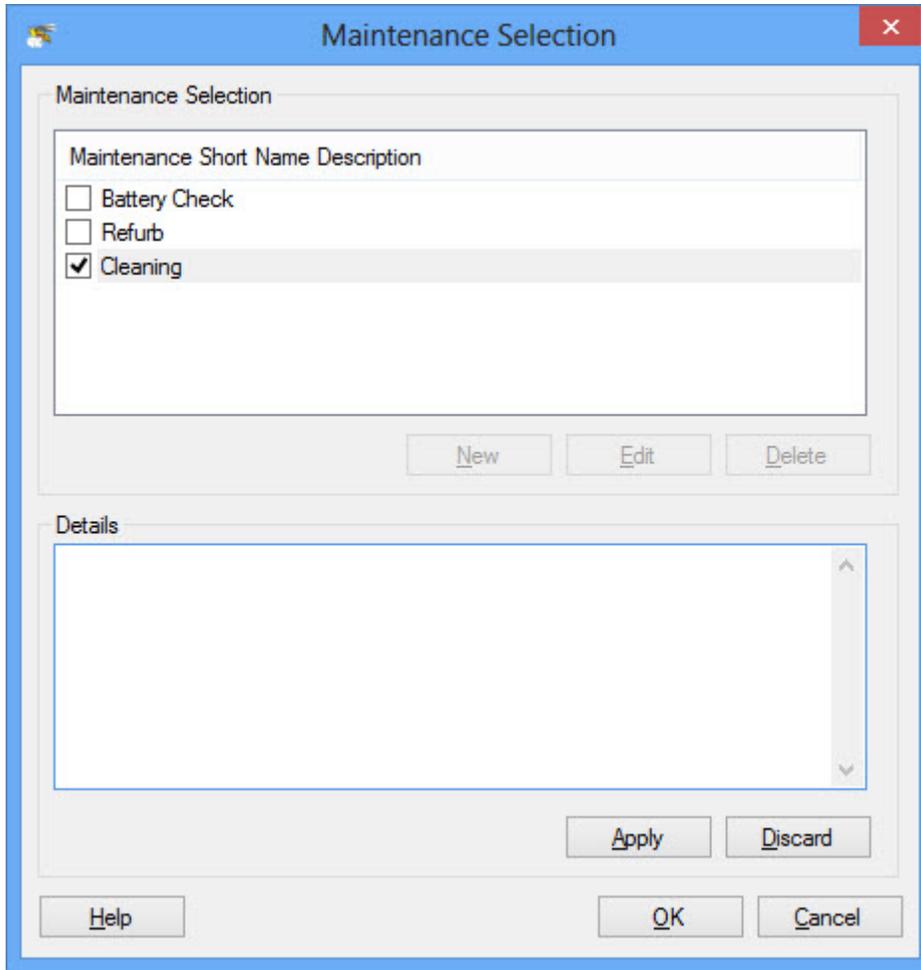
New Edit Delete

Details

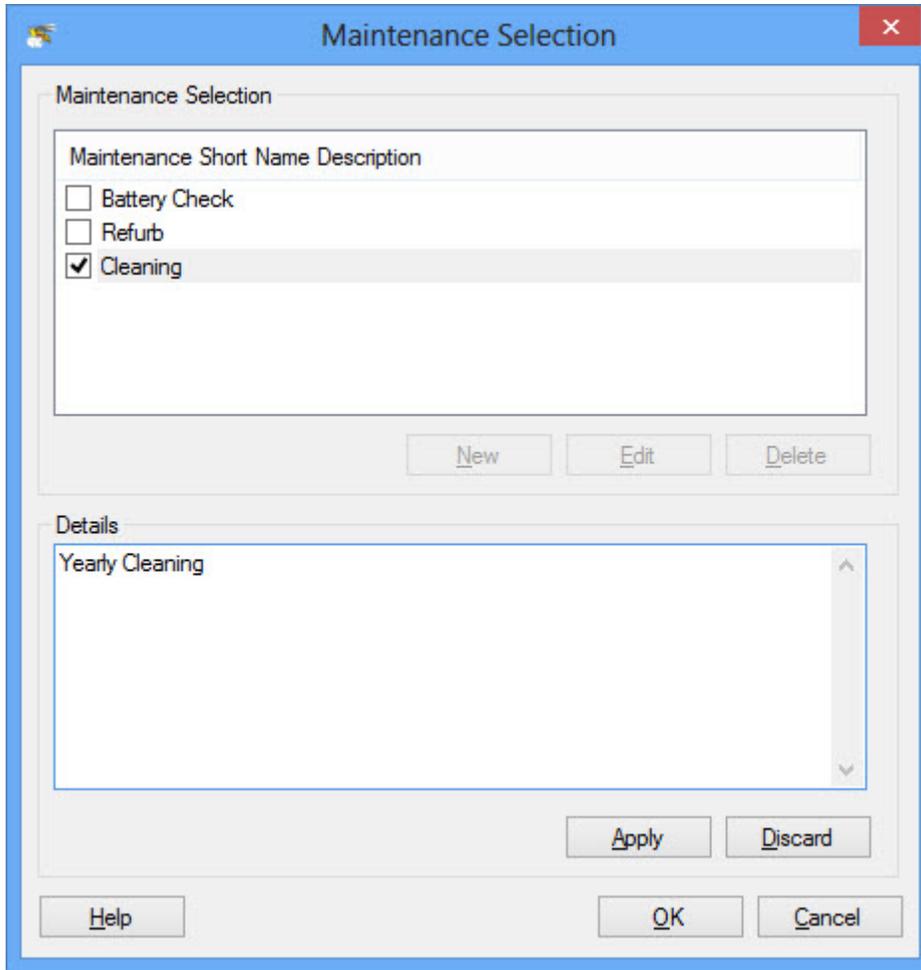
Apply Discard

Help OK Cancel

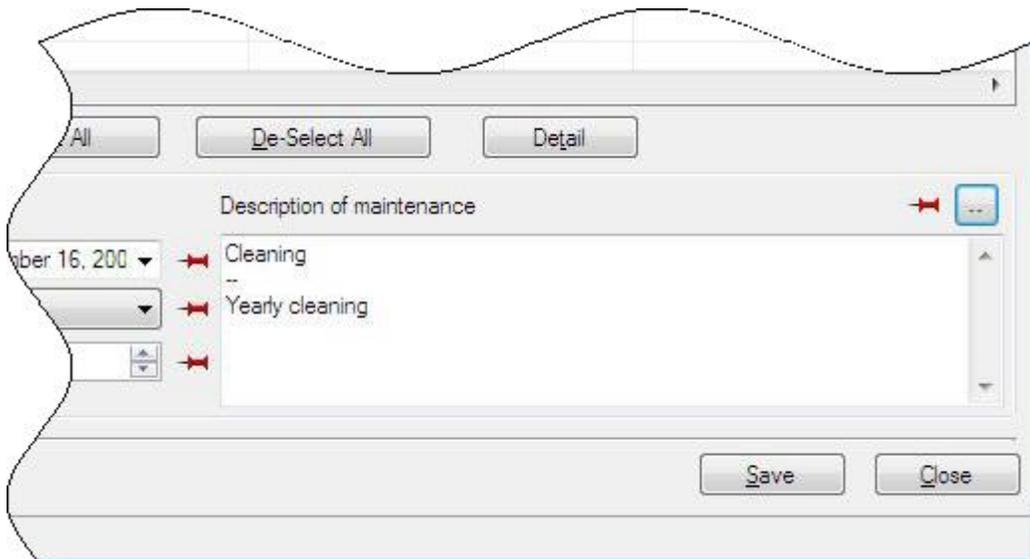
- c. Enter a name for this maintenance.



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

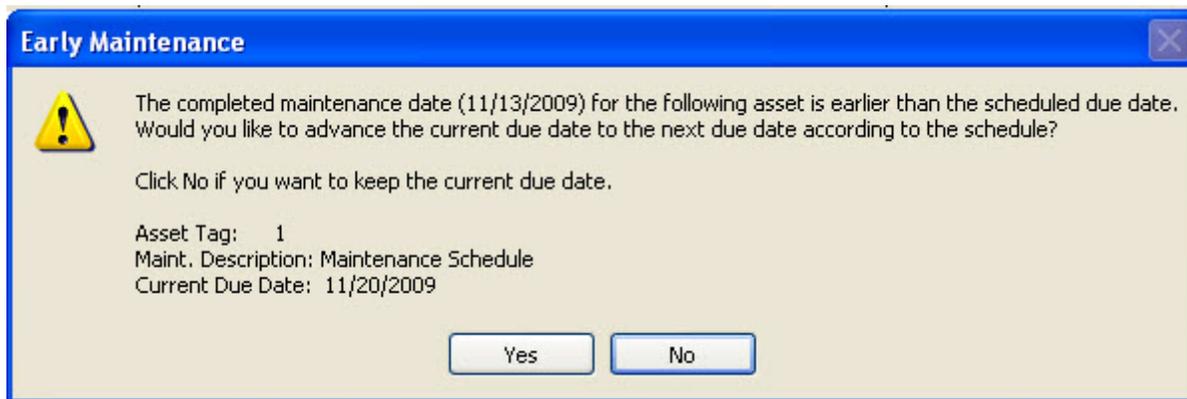


- e. Click **Apply** to save your changes.
- f. Select which maintenance description you want to use by checking the desired listing, then click the **OK** button. Your selection will be added to the **Description of Maintenance** field.



- 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.

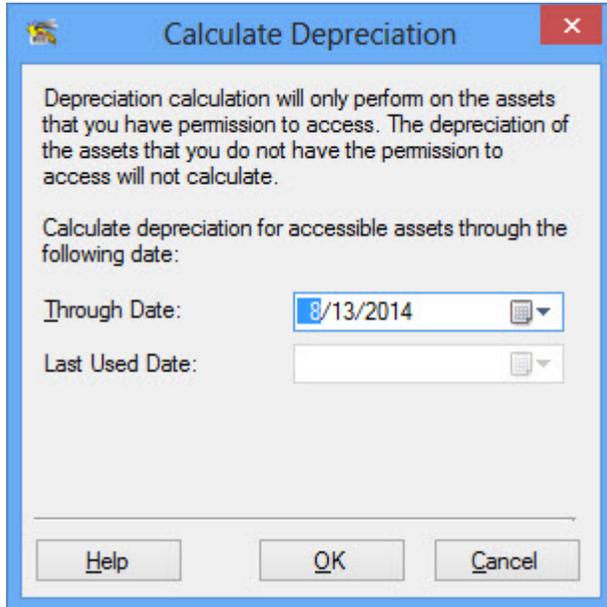
Select **No** to keep the current due date. The maintenance will be marked completed but the due date will stay the same.

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.

2.11.8 Calculating Depreciation

The **Calculate Depreciation** function is used to calculate depreciation up to the specified **Through Date** for *all* Assets with Asset Types having Depreciation Methods other than None.

- To access this function, from the **Main** screen, click **Asset Management > Calculate Depreciation**. The **Calculate Depreciation** screen appears.



- The **Last Used Date** indicates the last date depreciation was calculated.
- Specify the **Through Date** through which you want depreciation to be calculated or just click **OK** to accept the default date. [The default Through Date can be changed on the Options screen.](#)

Reminder: If you are using the Standard version of MobileAsset, only Straight-Line depreciation will be calculated.

Depreciation Definitions and Examples:

Click on the depreciation type below to view a definition and example. Remember that these depreciation methods are selected on the **Add/Edit Depreciation Class** screen. [Click here for more information on Adding/Editing Depreciation Classes.](#)

Straight-Line

Definition: 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

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

Definition: 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 will be scrapped and straight line used for the remainder of the asset's life.

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 is 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

Definition: 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

Definition: 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 Year's Digits

Definition: To calculate depreciation charges using the sum of the year's 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

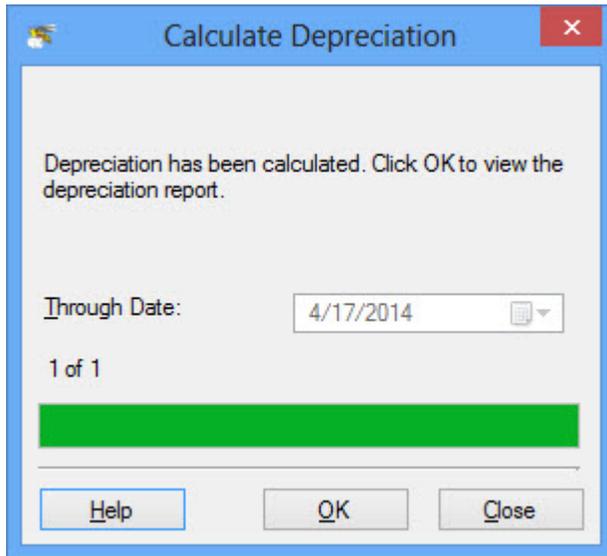
In the first year, the asset would be depreciated 10/55 in value [the fraction 10/55 is equal to 18.18%] the first year, 9/55 [16.36%] the second year, 8/55 [14.54%] the third year, and so on. Going back to our example from the straight-line method: a \$5,000 computer with a \$200 salvage value and 3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

3. After depreciation for all applicable assets has been completed, the screen will appear as follows:



Click the **OK** button to view the Asset Depreciation by Department Report or **Cancel** to close the screen.

- This software does not track depreciation over multiple periods. For example, after calculating depreciation for an asset using the variables in the examples provided above, if you were to later change the Purchase Cost or Salvage Value or any other relevant variable, the next time you calculate depreciation the system would not take into account any previous calculations.
- Any changes made to an existing Depreciation Class will impact depreciation calculations for every Asset defined with that Depreciation Class (via the Asset Type).

2.11.9 Mass Update

MobileAsset allows you to select multiple assets from the Asset List and update a number of fields. For example, if you want to update warranty information for all assets under a certain Asset Type, you can select all of those assets on the Asset List and make the change at one time.

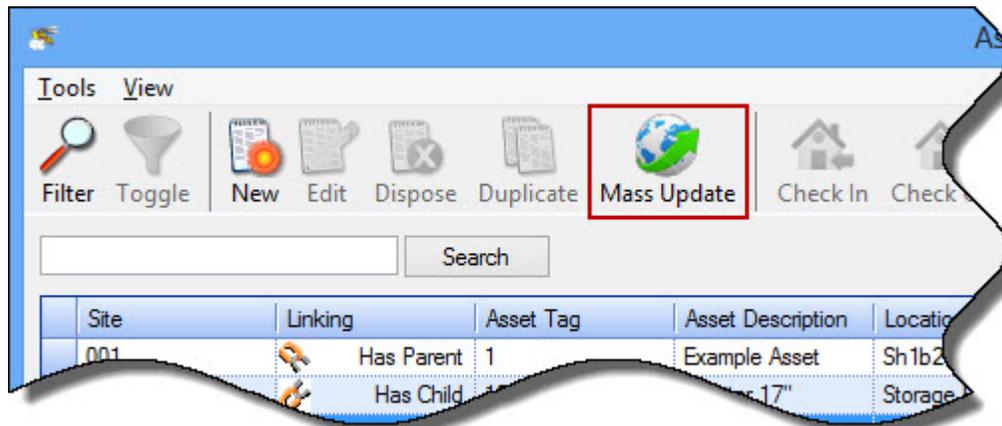
Using Mass Update:

1. From the **Main** screen, select **List Forms > Asset List**.

or

From the **Main** screen, select **Asset Management > List Assets**.

2. On the **Asset List** screen, select the assets you want to update. You can use the filter features to drill down to the assets you want. In the example below, we have filtered for Asset Type = Laptop IBM.
3. Now select all assets you want to change by holding down the **Ctrl** key and clicking on each one you want. Or you can select assets by holding down the SHIFT key and clicking on two assets. All assets in between the two you clicked on will be selected.
4. When you have selected the assets you want to change, click the **Mass Update** button on the toolbar:



The **Mass Update** screen appears:

Asset Tag	Asset Description	Asset Type	Department Code	Condition	Manufacturer	Model
4000	T61 Units	Laptop IBMThin...	IT			
4001	T61 Units	Laptop IBMThin...	IT			
4002	T61 Units	Laptop IBMThin...	IT			

Record: 1 Of 3

General Custom Fields Dynamic Custom Fields

General

Department Code: [dropdown]

Condition: [dropdown]

Asset Type: [dropdown]

Description: [text]

Description: [dropdown]

Manufacturer: [dropdown]

Model: [dropdown]

Vendor Number: [dropdown]

Check Out Length: 0 days 0 hrs 0 min

Check Out Lead: 0 days 0 hrs 0 min

Reminder Lead Time: 0 days 0 hrs 0 min

Additional Info: [text area]

Depreciation

One or more selected asset types can not be depreciated.

Purchase Order: [dropdown]

Purchase Date: [calendar]

Purchase Cost: 0.00

Salvage Value: 0.00

Depreciation Begin Date: [calendar]

Warranty

Begin: [calendar]

End: [calendar]

Provider: [dropdown]

Help Save Cancel

- The top portion of the **Mass Update** screen displays the assets you have selected. If needed, scroll through the columns in this window using the bar on the right. As with other lists in MobileAsset, you can sort the list by clicking on the column headers.
- Select the checkboxes in front of each field you want to update, then enter the information you want to change. Any fields you have selected (a checkmark will appear in the box as shown in the example below) will be updated. Unchecked fields will not be updated. Remember that once you click **Save**, any information you enter here will be applied to all assets that appear in the window.

You can manually type information into the fields or use the drop down menus. Most drop down menus will provide the options of <Blank> and <More>. <Blank> means any information previously contained in the field will be removed. <More> accesses the associated List screen allowing you to select from all Manufacturers, Vendors, etc.

Any fields that appear in bold are required fields. You cannot select Blank for required fields. Which fields are required will vary depending on your Custom Field Name settings.

Keep in mind that the **Depreciation** checkbox cannot be selected unless all assets in the **Mass Update** window are associated with an Asset Type that can be depreciated. Depreciation is activated at the **Asset Type** level on the **New Asset Type** or **Edit Asset Type** screen.

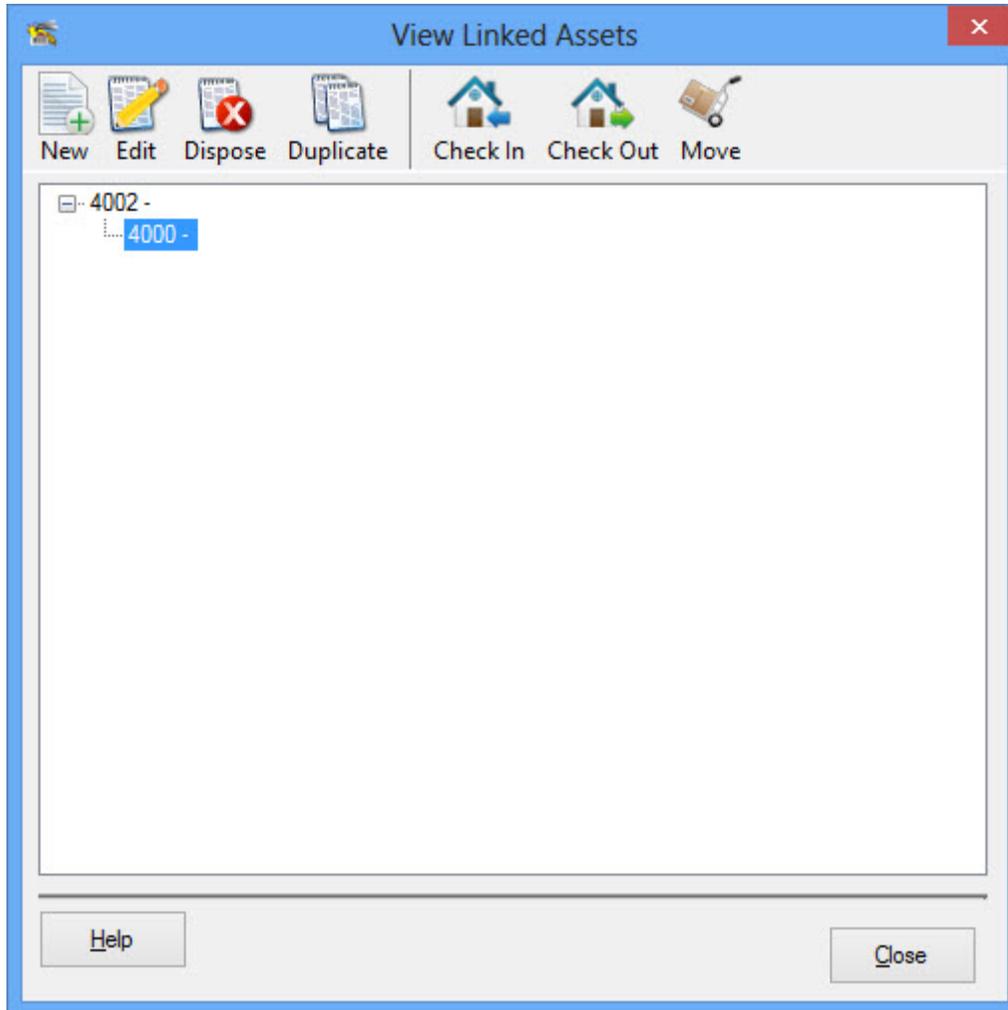
If the [Edit Inherited Asset Type Data](#) option is disabled on the **Options** screen, you will not be able to edit data under the **Asset Type**.

Tap on the **Custom Fields** or [Dynamic Custom Fields](#) tabs to make updates to the values selected for any custom fields. Dynamic Custom Fields will only appear if they are associated with every asset being updated. For example, if you have selected 3 assets with the Asset Type - Printer, and one asset with the Asset Type - Monitor, and a DCF has been created for Printer, but not for Monitor, the Dynamic Custom Fields tab will be blank.

- After you have entered information in the desired fields, click the **Save** button. Remember that once you click **Save**, any information you enter here will be applied to all assets that appear in the window.

2.11.10 View Linking

View Links - This option appears on the **Professional and Enterprise versions only**. If you are using asset linking, highlight a listing in the **Asset List**, then click the **View Links** button to view the parent asset and any children. Below is an example of the **View Linked Assets** screen.



There is a toolbar at the top of this screen allowing you to perform actions on the assets on the screen. These functions are listed below:

- **New**
- **Edit**
- **Dispose**
- **Duplicate**
- **Check In**
- **Check Out**
- **Move**

2.12 Administration

2.12.1 Company Information

The **Company Information** screen allows you to enter or update information about your business. The value entered in the **Company Name** field will appear at the top of the **Main** screen and also be used as the header for all reports and pre-defined labels. This screen should be filled out first when you initially setup the software.

1. To access the **Company Information** screen, from the **Main** menu, click **Administration > Company Information**. The **Company Information** screen shown below will appear:

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

The **Phone**, **Fax**, **Email** and **Website** fields are available if you would like to record this information.

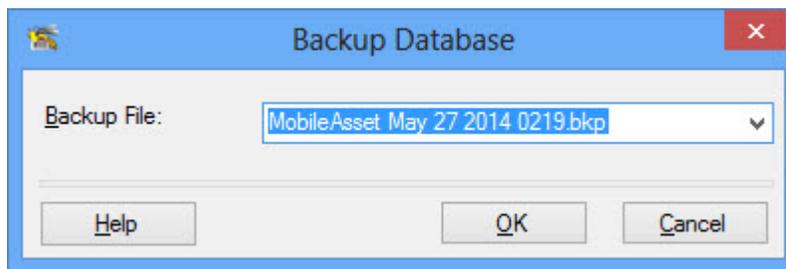
3. Click **OK** to save your data or **Cancel** to close the screen without saving.

2.12.2 Backing Up Your Database

Standard Edition:

Backing up your database is an important maintenance step that should be performed on a regular basis. Having a current backup helps to minimize data loss in the case of a system shut down or power failure. If you do experience a catastrophic system failure of some kind, having a current backup ensures you can quickly restore the most recent database. For information on restoring your database, please refer to the [Restoring the Database](#) topic.

1. From the **Main** screen, click the **Administration** icon.
2. On the **Administration Menu**, click **Backup**. The **Backup Database** screen appears.



3. Enter a name for this backup in the **Backup File** field, or accept the default name. It is a good idea to specify a name that will help you select the right backup file later if you need to restore the database. Adding the date in the file name is a good way to know which file is the latest.
4. Click **OK** to backup the database.

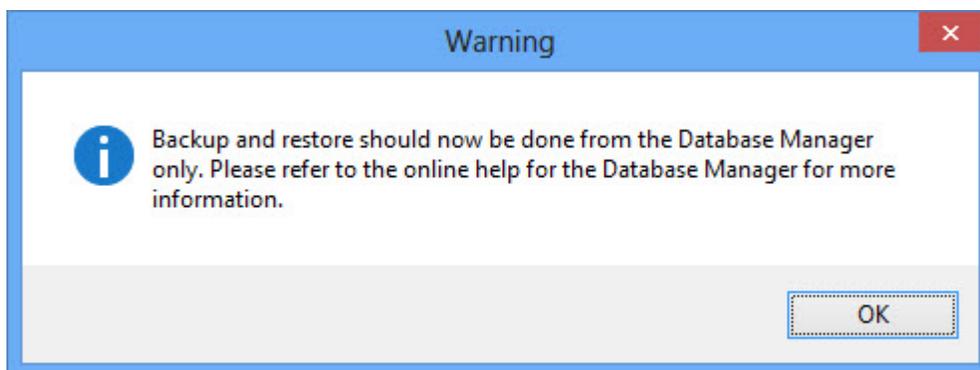
By default, the backup file is written to:

C:\Program Files (x86)\Microsoft SQL Server\MSSQL10_50.WASPDBEXPRESS\MSSQL\Backup

Professional Edition:

The **Backup** procedure is performed on the Database Manager. This separate application can be accessed from **Start > All Programs > Wasp > MobileAsset > Database Manager**. If you do not have the Database Manager installed you will need to install it using the MobileAsset Installation DVD. For detailed instructions on backing up databases using the Database Manager, please refer to the Database Manager online help.

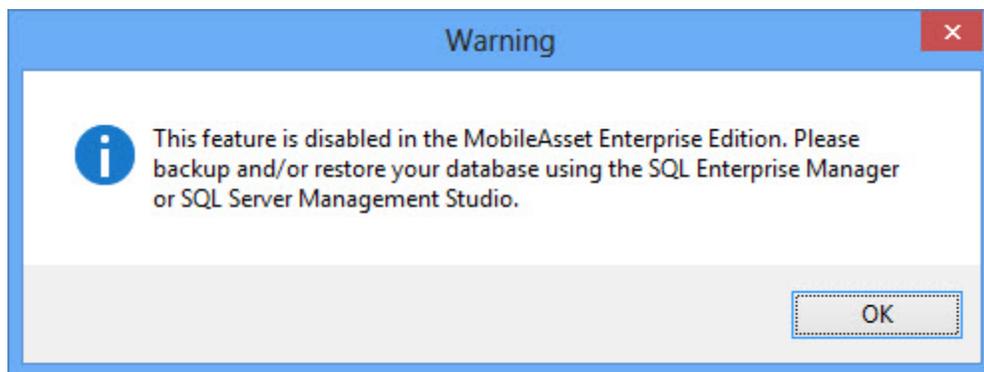
When the **Backup Database** button in MobileAsset is selected the following screen appears:



Enterprise Edition:

The Backup feature is not available in the Enterprise version. You must use SQL to perform backups.

When the **Backup Database** button in MobileAsset is selected the following screen appears:



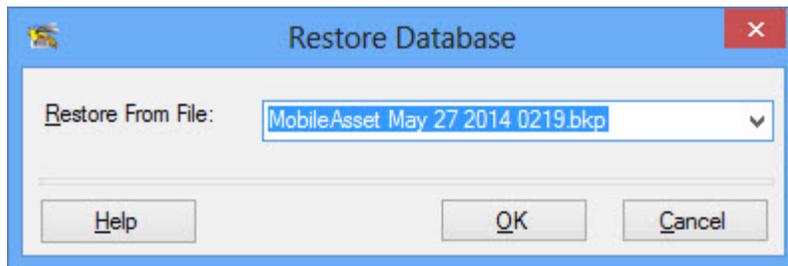
2.12.3 Restoring the Database

Standard Edition:

You can quickly restore a previously backed-up database using the Restore function. This is useful if something happens to corrupt your database. You can easily restore your last backed up database. This is why it is important to regularly backup your database.

Keep in mind that this operation will erase all the data currently in your database and replace it with the data in the backup including all Assets, Customers and Users. If there is any chance you will want to recover transactions that have been entered since the Backup was done, you might want to do a fresh Backup to a different file name right before restoring an older backup file, if possible.

1. From the **Main Window**, click the **Administration** icon.
2. On the **Administration** menu, click **Restore**. The **Restore Database** screen appears.



3. Enter the name of the backup in the **Restore From File** field. By default the most recently created backup will appear.

Backup files are located in:

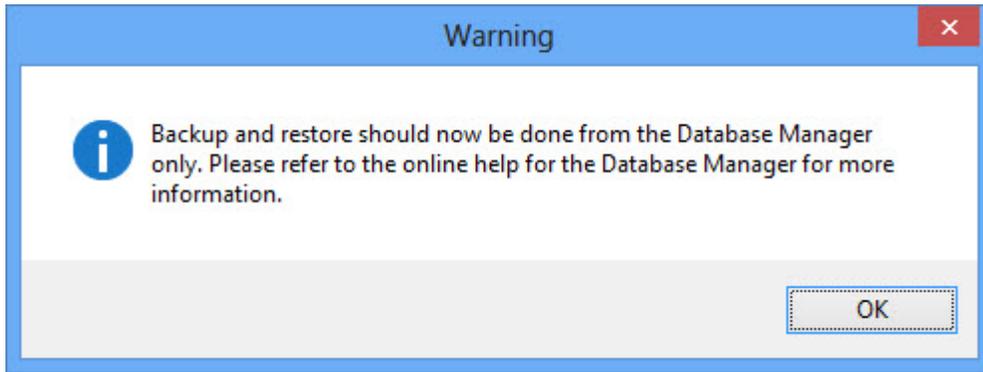
C:\Program Files (x86)\Microsoft SQL Server\MSSQL10_50.WASPD EXPRESS\MSSQL\Backup

4. Click **OK** to perform the database restore.

Professional Edition:

The **Restore** procedure is performed on the Database Manager. This separate application can be accessed from **Start > All Programs > Wasp > MobileAsset > Database Manager**. If you do not have the Database Manager installed you will need to install it using the MobileAsset Installation CD. For detailed instructions on backing up databases using the Database Manager, please refer to the Database Manager online help.

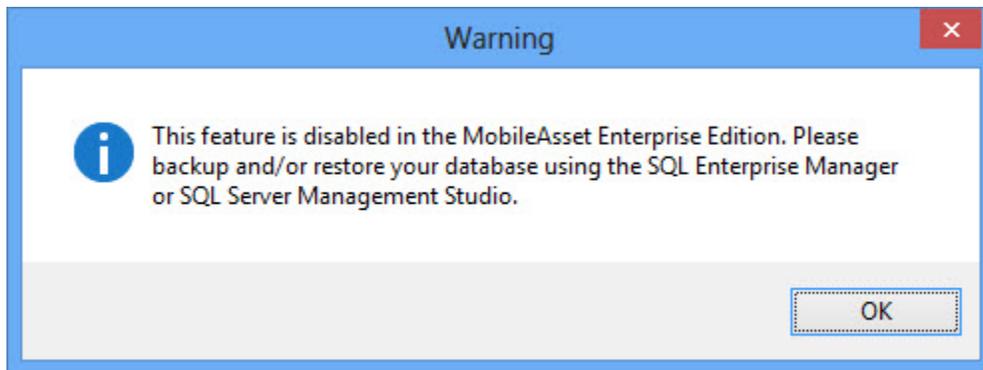
When the **Restore Database** button on MobileAsset is selected the following screen appears:



Enterprise Edition:

The Restore feature is not available in the Enterprise edition. You must use SQL to restore backups.

When the **Restore Database** button on MobileAsset is selected the following screen appears:



2.12.4 Security

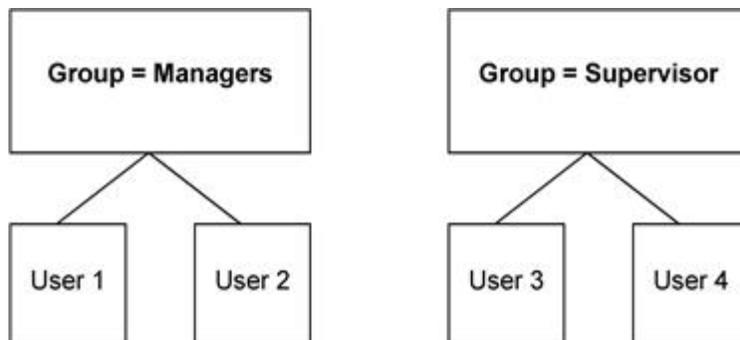
Managing Groups

User security in MobileAsset is set up by Group. A Group is a collection of security settings that one or more users share. You will need to create your Groups first, then add users and assign them to Groups. Before setting up your groups, take some time to think about the types of employees you have, who will need access to the software and what features/functions they will need to use in the software. You will want to create a Group for each different type of user you may have. You may need a Group for Managers, who have access to all Sites, Reports, Auditing, etc. Another group might be Supervisors who only need access to Reports and basic functions such as check in/out, but don't need access to Auditing. A third Group may be comprised of warehouse workers who need access to the mobile devices, but don't need to be able to log on to the PC.

For example, your company may have 5 supervisors who all need access to the same functions in the software. Instead of setting up each user and assigning these functions individually, you will enter the basic user information, then assign that user to a Group. The security access is then automatically assigned to the user based on the Group settings.

If you are upgrading from a previous version of MobileAsset, existing employees are automatically divided into groups based on their security settings. The groups are named a generic name similar to Group 1, Group 2, Group 3, etc. You can consolidate and/or rename these groups as needed.

The structure of Groups to users is shown in the diagram below:



Keep in mind that changes you make to a Group, such as assigning new security privileges, will affect all users assigned to that Group.

The topics covered in this section are:

[Group Security Roles Screen Overview](#)

[Adding a Group](#)

[Duplicating a Group](#)

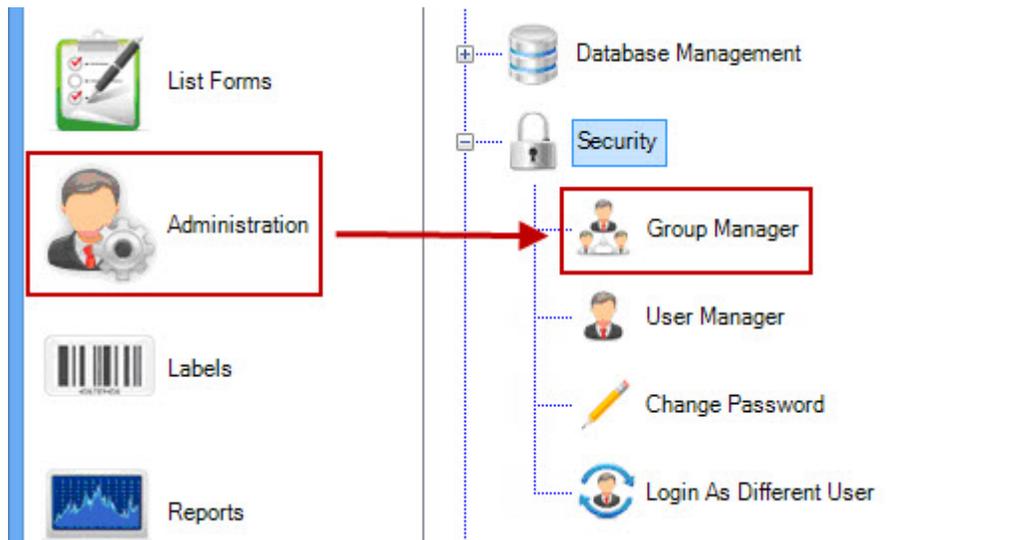
[Deleting a Group](#)

[Viewing the User List](#)

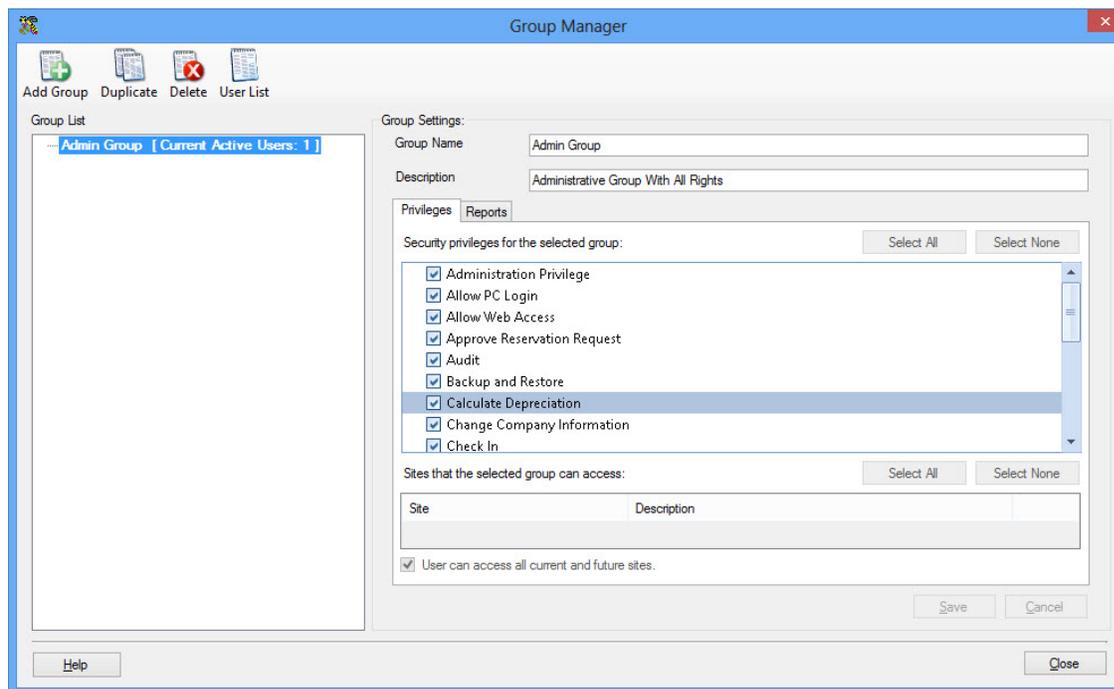
Enterprise Edition Only: Enterprise users have the option to utilize Active Directory Integration. Please refer to the topic [Active Directory Integration](#) for more information.

Group Security Roles Screen Overview

1. From the **Main** screen, click **Administration > Security > Group Manager**.



The **Group Manager** screen appears:



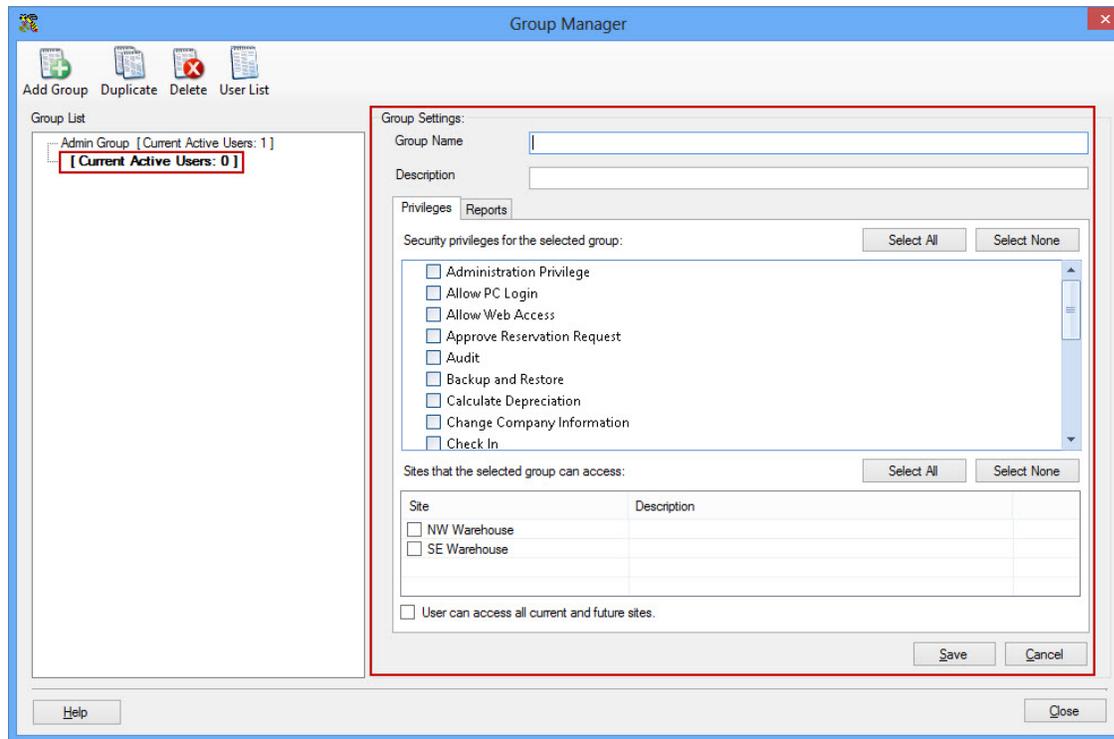
This screen lists any **Groups** that you have previously created, plus the default Admin group. Note that Admin has access to all features/functions and to all Sites.

You can view the **Security Privileges** and **Site Privileges** of a **Group** by selecting that **Group** in the list.

From this screen you can [Add a Group](#), [Duplicate a Group](#), [Delete a Group](#) or [View the User List](#).

Adding a Group

1. Click the **Add Group** button on the toolbar. The **Group Manager** screen appears with a new entry in the **Group List** and the privileges fields appear unchecked as shown below:



2. Enter a **Group Name** and a **Description** for this group.
3. Now you can select the features to which the users assigned to this Group will have access. Select the checkbox next to the features you want to add to this Group. You can select individual features or choose the **Select All** button to select all features in the list. Click **Select None** to prevent this Group from having access to any features in MobileAsset.
4. Next you can select the **Sites** to which this Group will have access. You have two options in this section. You can select one or more Sites using the checkboxes. This gives the Group permission to access those Sites. You can select individual Sites or choose the **Select All** button to select all Sites in the list. Click **Select None** to prevent this Group from having access to any Sites.

OR

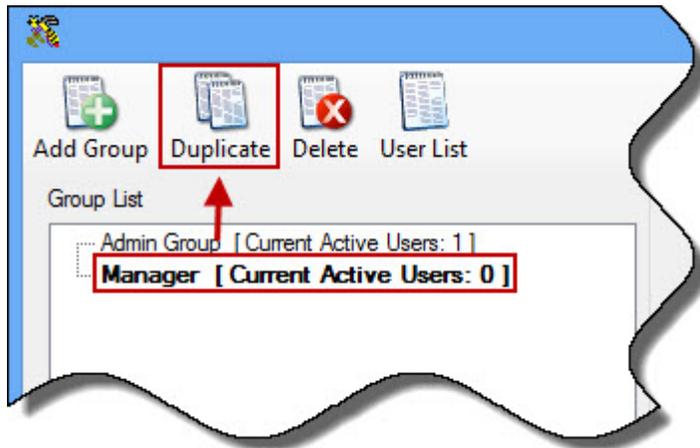
You can select the **User can access all current and future sites** checkbox. This disables the Sites. Selecting this option means users in this Group will have access to all current Sites and any future Sites you may add.

5. When you have finished making your selections, click the **Save** button.

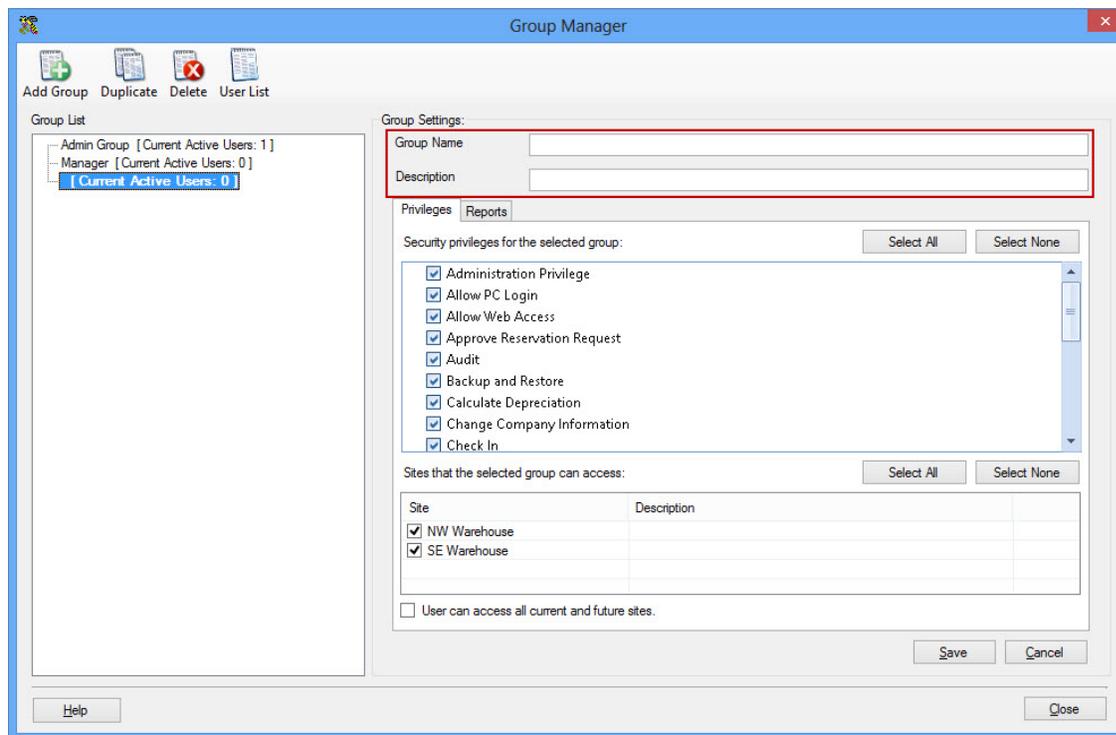
Duplicating a Group

If you want to use most or all of a Group's settings for a new Group, you can create a copy, or duplicate, of the Group, then add a new name and description. To do this:

1. On the **Group Security Roles** screen, select the Group you want to duplicate, then click the **Duplicate** button on the toolbar.



The screen appears populated with the selected Group's settings, but with the **Group Name** and **Description** fields blank.

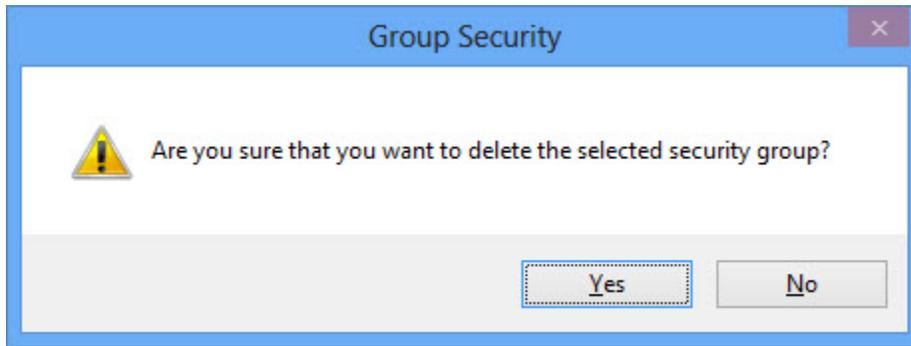


2. Enter a new **Group Name** and **Description**, then select to which sites this user will have access. You can also modify any feature or Site privileges as needed.
3. Click the **Save** button when you are done making changes. The new Group will be added to the list.

Deleting a Group

Note: Groups with users assigned to them cannot be deleted.

1. On the **Group Security Roles** screen, select the Group you want to delete, then click the **Delete** button on the toolbar. The confirmation screen shown below appears:



2. Click **OK** on the confirmation screen. The Group will disappear from the list.
-

Viewing the User List

1. On the **Group Security Roles** screen, click the **User List** button. The [User List](#) will appear.

Adding, Editing or Duplicating Users

The **Add New User** screen allows users assigned to the Admin Group to create new users who will have access to the system. The **Edit User** screen allows you to edit users you have already added to the database. These two screens are identical and function in the same way, so they are both discussed in this topic.

Note for Enterprise Users: If you have set up MobileAsset to work with multiple companies (i.e. you have created multiple databases) and you have users that you want to have access to two or more of the additional databases, you will need to add them on each database. When the user logs in, the companies that appear on the [Select Company](#) screen depends on which databases the user has been added to. If the user is only added on one database, the **Select Company** screen will not appear.

1. To Add/Edit Users:

To add a user:

- a. From the **Main** screen, select **Administration > Security > User Manager**. The **User List** appears.
- b. On the **User List**, select the **New** button from the toolbar.
- c. The **Add New User** screen appears.

To edit an existing user:

1.
 - a. From the **Main** screen, select **Administration > Security > User Manager**. The **User List** appears. This screen lists all users you have already setup in your system.
 - b. Highlight the user you want to edit in the **User List**, then click the **Edit** button on the toolbar.

To duplicate a user profile:

2.
 - a. From the **Main** screen, select **Administration > Security > User Manager**. The **User List** appears. This screen lists all users you have already setup in your system.
 - b. Highlight the user you want to copy in the **User List**, then click the **Duplicate** button on the toolbar. The **Add New User** screen will appear with the **Group** privileges already populated. Keep in mind that you cannot change the **Privileges** settings for the group.

3. The example shown below is the **Add New User** screen. This is identical to the **Edit User** screen; however, the **Edit User** screen will be populated with the information of the user you selected in the **User List**.

- a. From the **Main** screen, select **Administration > Security > User Manager**. The **User List** appears. This screen lists all users you have already setup in your system.
- b. Highlight the user you want to edit in the **User List**, then click the **Edit** button on the toolbar.

2. The fields in bold on this screen are required.

- Enter information in the **First Name**, **Last Name**, and **User Name** fields. These fields are used for [Logging On](#).
- An initial **Password** and a **Status**. The user should change their password using the [Change Password](#) screen upon logging in. The **Password** field is masked for security reasons.

The **Status** is usually set to **Active**, meaning the user will be able to access and use they system based on his/her security settings. **Inactive** users will show the text "Inactive" next to their names in the User List and will not be able to access the system.

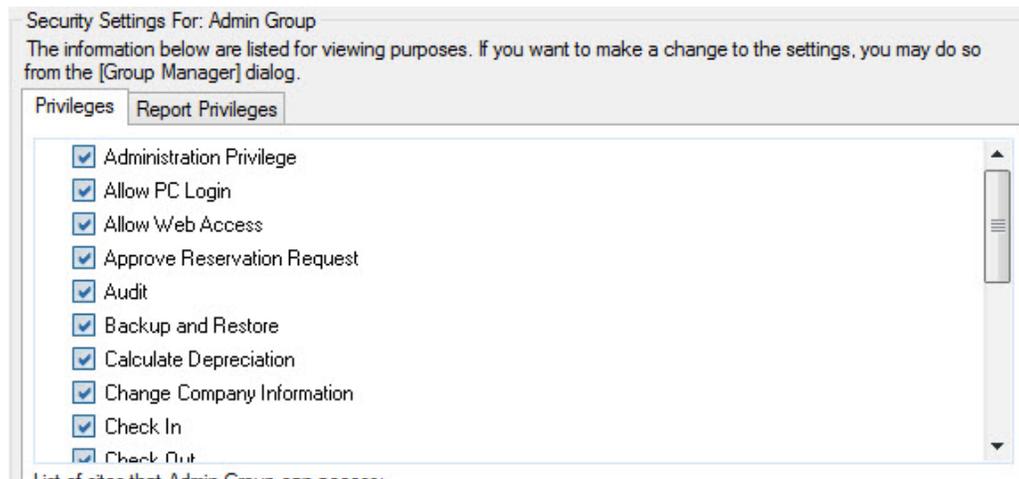
Note on Creating Passwords:

A **Password** can contain any of the following characters:

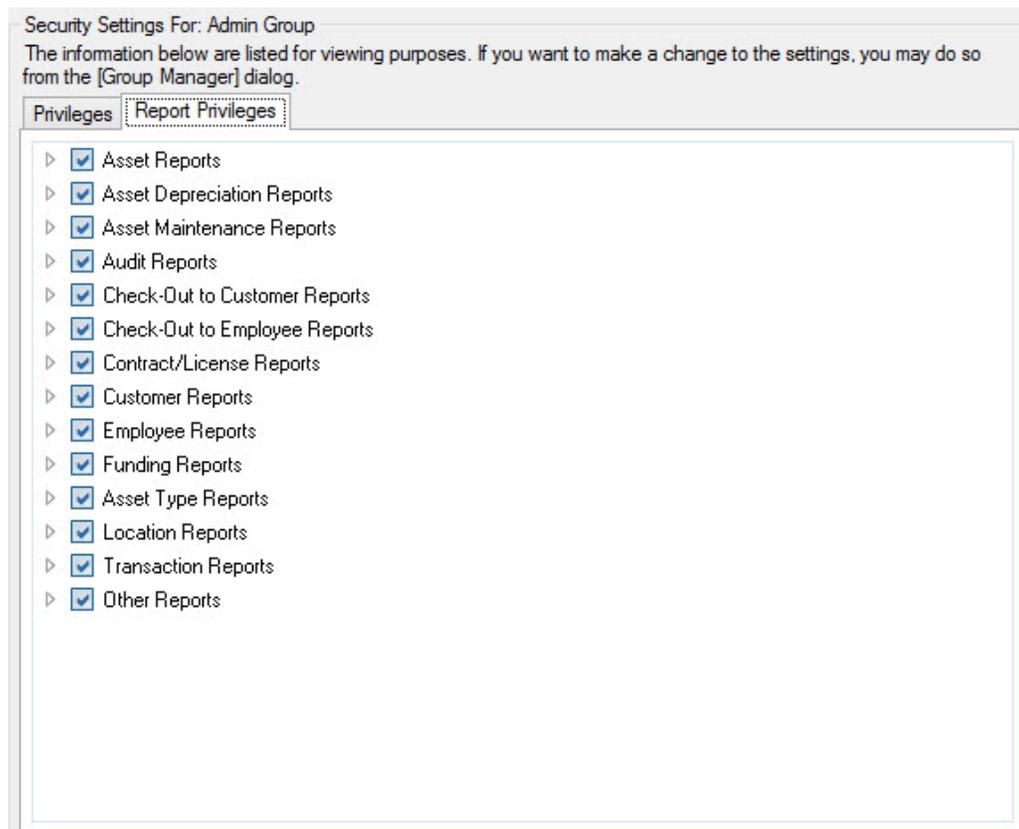
- A - Z (uppercase & lowercase),
- 0 - 9
- **or any of these special characters:** ` ~ ! @ # \$ % ^ & * () _ + - = [] { } | < > ? : ; , ,
- You must assign this user to a **Group**. Groups are setup and managed from **Administration > Security > Manage Groups**. Each user must be assigned to a group.

Note that after you chose a **Group**, the features and functions in MobileAsset to which the user will have access will display in the **Security Settings > Privileges** section. The **Privileges** settings cannot be changed on a per user basis. If you want to customize the settings for a user (by allowing one supervisor access to reports, while other supervisors do not have this access, for example), then you will need to create a new [Group](#) with the desired privileges and assign it to that user. Note that this section is divided into two tabs. The **Privileges** tab contains general functions related to the PC and mobile device. The **Report Privileges** tab contains individual reports and report types.

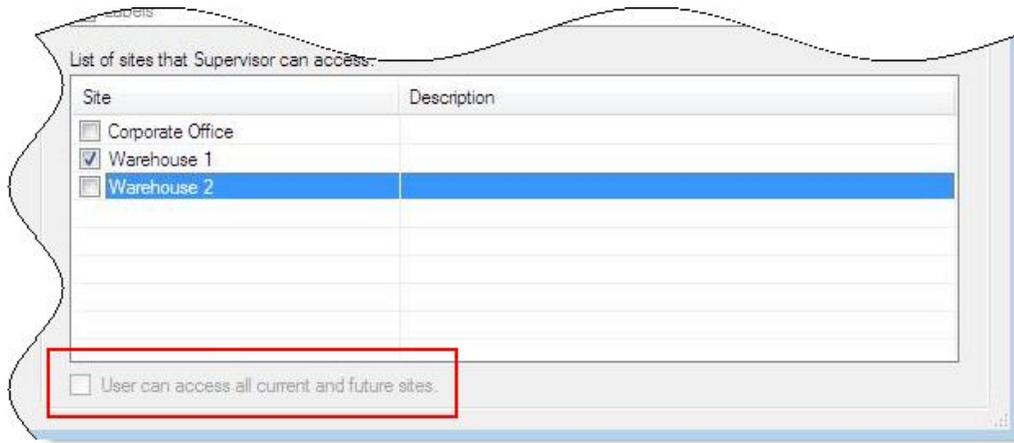
Below is an example of the **Security Settings > Privileges** section:



Below is an example of the **Security Settings > Report Privileges** section:



In addition, the sites to which this **Group** has access will appear in the **List of sites that <Group> can access** section. This is set at the Group level and can only be changed from the [Edit Group](#) screen. An example of the **Site** section with the **User can access all current and future sites** checkbox highlighted is displayed below:



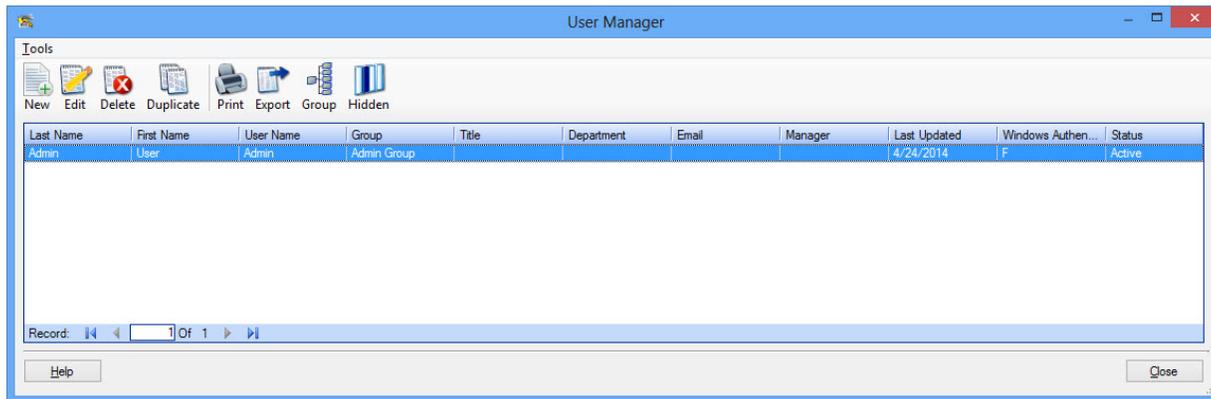
- You may optionally enter information in the **Title**, **Department**, **Manager**, and **Email** fields.

3. Click **OK** when you have finished entering information on this screen.

Note: If you intend to define only one new user other than the default Admin account, we recommend you set that user up as an **Admin** as well.

User Manager Example

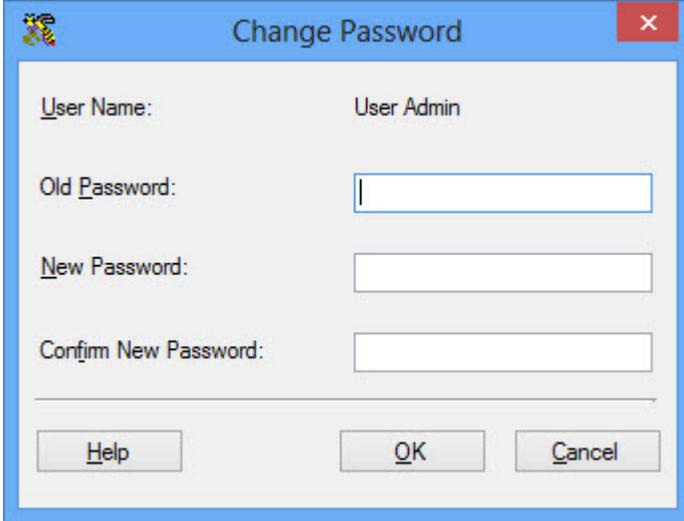
The **User Manager**, accessed from the **Main** screen by selecting **Administration > Security > Manage Users**. The **User List** allows you to view users you have already setup and to create new or modify existing users. A user is anyone who is set up to have access to the software. For detailed information on working with list screens, please see [Working with Lists](#). For detailed information on adding, editing users or duplicating users, please see [Adding or Editing Users](#). Below is an example of the **User Manager**.



Change Password

The **Change Password** feature allows you to change your current password.

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



The screenshot shows a standard Windows-style dialog box titled "Change Password". It contains the following elements:

- Title Bar:** "Change Password" with a close button (X) on the right.
- User Name:** A label followed by the text "User Admin".
- Old Password:** A label followed by an empty text input field.
- New Password:** A label followed by an empty text input field.
- Confirm New Password:** A label followed by an empty text input field.
- Buttons:** Three buttons at the bottom: "Help", "OK", and "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: ` ~ ! @ # \$ % ^ & * () _ + - = [] { } | < > ? : ; , .

Note: You can also change your password by going to **File > Change Password**.

Login as Different User

The **Login as Different User** function allows the current user to log out and log back in as a different user.

1. To access this function, from the **Main** screen click **Administration > Security > Login as Different User**. The login screen appears.
2. Enter a different User Name and Password to login as a different user.

Note: You can also login as a different user by going to **File > Login as Different User**.

Active Directory Integration

Enterprise Edition Only

The Windows NT Authentication feature is turned off by default on the [Options screen](#). To turn it on you must navigate to **Administration > Options > Active Directory** and select the **Yes** checkbox.

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 is automatically created and added to the **Manage Users** screen in MobileAsset. If you have [turned on the Create Employee option](#) on the **Options** screen (it is ON by default), an Employee record will be create at the same time as the User Account.

Example: You have a group in your Active Directory named My Users and you want everyone in My Users to have access to MobileAsset. 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 on the PC, MobileAsset will recognize the Active Directory Group name as matching the MobileAsset **Group** name and automatically create a **User** account for that user. After the group is setup, when the user accesses MobileAsset on the PC, MobileAsset will recognize the computer is on the network and automatically log the user in using their network login and password.

If you are using Windows NT Authentication and you see the regular MobileAsset login screen when accessing MobileAsset, you were not authenticated using your Windows credentials for some reason. Check with your network administrator to resolve this issue.

You can then view those **User** accounts in MobileAsset (**Security > Manage Users**). Keep in mind that if you change the password on a user's MobileAsset user account, she will receive the regular login screen and must enter the new password, rather than her network password.

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 **Select Company** screen to choose the company they want to work with before entering MobileAsset.

You can give a group access to all companies or you can give select members of the group access to a company. Remember that all members assigned to the Group in the Active Directory will have the rights assigned them in the matching MobileAsset Group. If there are some people listed in the Active Directory group that you do not want to have the same rights, you will need to edit the Group in the Active Directory or create groups and users manually in MobileAsset. Creating the users manually means you will lose the ease of auto-created user accounts.

Note: Keep in mind that Active Directory Integration with MobileAsset is a one-time data exchange. If you update a user or a group name in the Active Directory or in MobileAsset, that change will not be transmitted to the other database. If an edit is made, you will need to manually make the same edit in the other database or Windows NT Authentication will not be able to authenticate the user.

2.12.5 Import / Export Wizard

Import Strategy

Presented in this topic are recommendations for using [Import Wizard](#) to import data from a different application into *tables* (Information you enter into each field in MobileAsset is stored in a database "table" behind the scenes. You can extract this information using the Export Wizard.) in the software database:

- The software database contains 10 tables: Site, Location, Asset Type, Asset, Depreciation Class, Employee, Customer, Vendor, Manufacturer and Department. The Import Wizard can only transfer data into one table at a time, so multiple imports must be performed to populate the database.
- You may not have external data files from which to import all the information you wish to track in the software, but importing data which you do have can save a lot of time compared to manually entering the data for each record.
- The software requires that, at a minimum, information must be imported (or manually entered) for **Site, Location, Asset Type** and **Asset**. These four tables are required for all Asset Management functions (check in, check out, etc).
- Data should be imported (or manually entered) in this sequence: Vendor, Manufacturer, Depreciation Class, Asset Type, Department, Site, Location, Asset, Employee, Customer.
- If you want to [Calculate Depreciation](#) for any or all Asset Types, import **Depreciation Class** data before importing Asset Type records.
- If you want to perform Check-Outs and Check-Ins to employees or customers, import **Employee** and/or **Customer** data.
- Data for the three remaining tables is optional: **Vendor** or **Manufacturer** (this should be imported prior to importing Asset Type records), **Department** (this should be imported prior to importing Asset and/or Employee records).
- Manufacturer, Model, Vendor Number, Checkout Length and Lead Time are not available by default for import on the Asset import sample. If you want to import this data with the Asset, you will need to manually add these columns to the Asset import sample file.
- Samples of import files are located at Program Files (x86)\Wasp Technologies\MobileAsset\Import Samples.

The following table lists the pre-requisites for importing data to each table and the functions supported by the data in each table:

Import To Table	Information that must be entered prior to importing	Data is Required to Perform These Functions	Data is Optional to Perform These Functions
Vendor	None		Create or Edit Asset Type
Manufacturer	None		Create or Edit Asset Type
Depreciation Class	None	Calculate Depreciation	Create or Edit Asset Type
Asset Type	Vendor (if desired), Manufacturer (if desired), Class (if desired)	All Asset Management Functions	
Department	None		Create or Edit Assets and/or Employees
Site	None	All Asset Management Functions	
Location	Site (at least one) (this product only supports one site)	All Asset Management Functions	

Asset	Class (if desired), Asset Type, Department (if desired), Site, Location	All Asset Management Functions	
Employee	Department (if desired)		Check- Out/Check-In
Customer	None		Check- Out/Check-In

* The database can be populated manually by manually entering each new record rather than importing the information.

The Pre-Requisites shown in the table above mandate that information be imported in the following sequence:

1. **Vendor** (Optional)
2. **Manufacturer** (Optional)
3. **Depreciation Class** (Optional)

If you intend to use them, import the Classes above before importing Asset Types!

4. **Asset Type** (Required for all Asset Management functions)
5. **Department** (Optional)
6. **Site** (Required for all Asset Management functions)
7. **Location** (Required for all Asset Management functions)

If you intend to use Department for Assets or Employees, import Departments before Assets, Employees or Customers!

Import Asset Type, Sites (if more than one) and Locations before importing Assets!

8. **Asset** (Required for all Asset Management functions)
9. **Employee** and/or **Customer** (Required only for Check-Out and Check-In functions)
10. **Funding**

Prior to importing information, external data should be organized in .txt or .csv files as follows:

Each record in a **Vendor.csv** file requires a column for **Vendor Code**.

The following columns are optional: Address 1, Address 2, City, Contact Cell No., Contact Ext., Contact Fax, Contact Name, Contact Phone, Country, Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Email, Extension, Fax, Mail Stop, Name, Notes, Phone, Postal Code, State, and Web Site.

Each record in a **Manufacturer.csv** file requires a column for **Name**.

The following columns are optional: Address 1, Address 2, City, Contact Cell No., Contact Fax, Contact Name, Contact Phone, Country, Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Email, Extension, Fax, Mail Stop, Notes, Phone, Postal Code, State, and Web Site.

Each record in a **Class.csv** file requires columns for **Name** and **Depreciation Method**.

The following columns are required only when one or more Depreciation Class records will have a Depreciation Method other than None: Asset Life Years (1 - 99) and Asset Life Months (1 - 12).

Example Class.csv records:

```
Name,Depreciation Method,Asset Life Years,Asset Life Months
DepNone,None,0,0
DepSL1y,Straight-Line,1,0
DepSL1y6m,Straight-Line,1,6
DepSL2y,Straight-Line,2,0
```

Each record in an **AssetType.csv** file requires a column for **Asset Type** and **Class** if the software is to Calculate Depreciation for one or more Asset Types.

The following columns are optional: Category, Check-Out Length, Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Description, Height, Length, Manufacturer, Model, Notes, Vendor Code, Weight, and Width.

Example AssetType.csv records:

```
AssetType,Description,Class
Acme 2750,Compression Drill,DepSL1y6m
Acme 3120,Rt-Angle Adapter,DepNone
Rorch M5,Std Line Extractor,DepSL1y
Rorch M7,Dlx Line Extractor,DepSL2y
```

Each record in a **Department.csv** file requires columns for **Department Code** and **Department Name**.

The following columns are optional: n/a

Each record in a **Site.csv** file requires a column for **Site**.

The following columns are optional: Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Description and Notes.

Example Site.csv records:

```
Site,Description
Bldg1,North Warehouse
Bldg2,South Warehouse
Bldg3,Satellite Warehouse
```

Each record in a **Location.csv** file requires columns for **Site** and **Location**.

The following columns are optional: Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Description and Notes.

Example Location.csv records:

```
Location,Site,Description
101,Bldg1,Room 101
102,Bldg1,Room 102
103,Bldg1,Room 103
104,Bldg1,Room 104
```

Each record in a **Asset.csv** file requires columns for **Asset Tag**, **Asset Type**, **Site** and **Location**.

The following columns are optional: Additional Info, Category, Check-Out Length, Class, Condition (Bad, Excellent, Fine, or Good), Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Department Code, Depreciate Asset (T or F), Depreciation Begin Date, Manufacturer, Model, Purchase Cost, Purchase Date, Purchase Order, Salvage Value, Serial No., Warranty Begin Date, Warranty End Date and Warranty Provider.

Example Asset.csv records:

```
Asset Tag,AssetType,Site,Location
100001,Acme 2750,Bldg1,107
100002,Acme 2780,Bldg1,107
100003,Acme 3120,Bldg1,115
100004,Rorch M5,Bldg1,103
100005,Acme 2750,Bldg2,209
```

Each record in a **Employee.csv** file requires a column for **Employee No.**, **First Name** and **Last Name**.

The following columns are optional: Address 1, Address 2, City, Country, Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Department, Email, Extension, Mail Stop, Notes, Phone, Phone Type, Postal Code, State and Title.

Each record in a **Customer.csv** file requires a column for **Customer No.**

The following columns are optional: Address 1, Address 2, Cell No., City, Company Name, Country, Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Date Added, Department, Email, Extension, Fax, Home No., Mail Stop, Name, Notes, Phone, Postal and State.

.CSV files are "comma separated values" files, which many database and spreadsheet applications can create via their "File > Save as..." or "File > Export..." functions.

Please refer to the topic [Import Wizard](#) for step-by-step instructions on using the Import Wizard.

Import Wizard

The **Import Wizard** allows you to bring Vendor, Manufacturer, Depreciation Class, Asset Type, Department, Site, Location, Asset, Customer and Employee data into the *tables* (Information you enter into each field in MobileAsset is stored in a database "table" behind the scenes. You can extract this information using the Export Wizard.) in your database from external sources you already possess. This software does not support direct importation of data from other databases. It imports data from .CSV or .TXT files only. As this function is in a wizard form, the screens will guide you through each step of the export process.

What is a .csv 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.

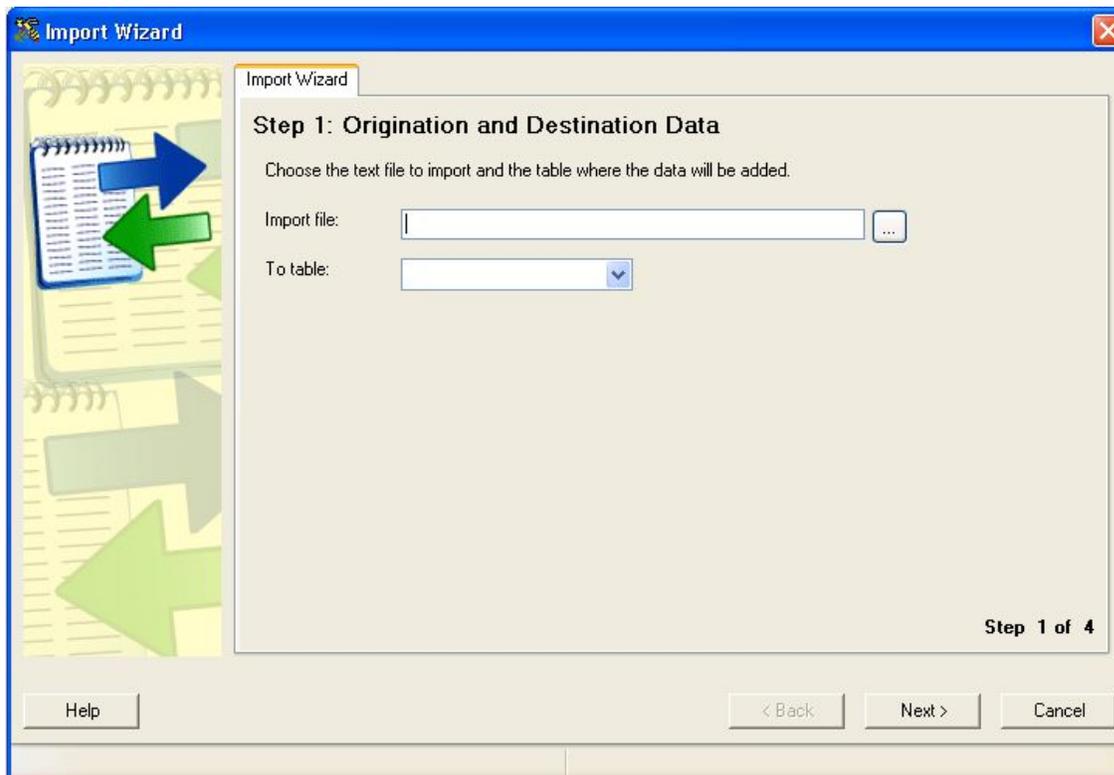
For example, data pulled from a database and represented in comma-delimited format looks something like the following. Each column value is separated by a comma from the next column's value and each row starts a new line:

```
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.

Please study the [Import Strategy](#) topic before proceeding.

1. To access the Import Wizard, from the **Main** screen, select **Administration > Import/Export > Import Wizard**. The **Import Wizard** screen shown below appears:



It is from this screen that you can start the process of Importing data into MobileAsset's tables.

Example of an Import to the Asset table

As discussed in the Import Strategy topic, data imported to the Asset table must be preceded by the creation of Site, Location, and Asset Type data (and, if depreciation is to be calculated for one or more Asset Types, by creation of Depreciation Class records - which must be done before importing Asset Type data.)

1. Having previously populated the database with Site, Location, Depreciation Class and Asset Type data, in that sequence, proceed with importing information to the Asset table.
2. Select an import file for the Asset table by browsing to a .csv or .txt file that contains Asset data and selecting Asset from the To table drop down list.

You can only import from a text (.txt or .csv file).

What is a .csv 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:

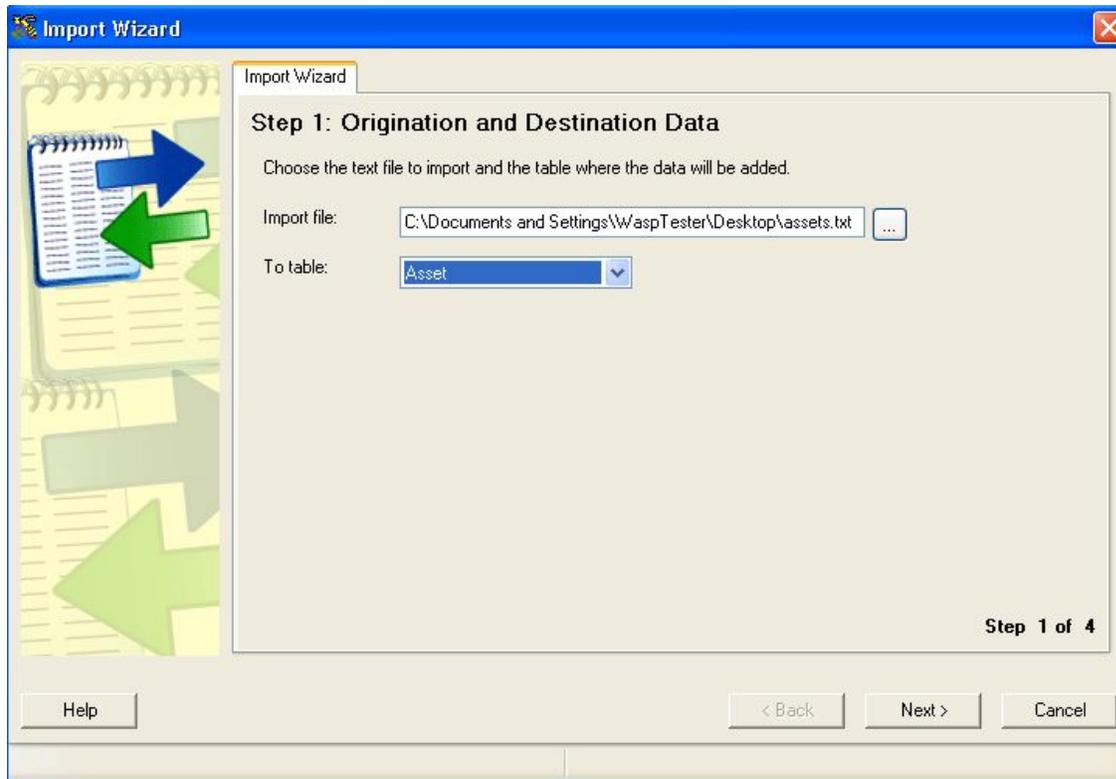
```
Adams, Jane, 46, female, New York
Doe, John, 32, male, California
Jones, Sam, 13, male, Texas
Smith, Mary, 64, female, Louisiana
```

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

If your data normally resides in a different data format, you must first use your database software's **File > Export** or **File > Save As** function to translate the data to a .csv or .txt file. See the [Import Strategy](#) topic.

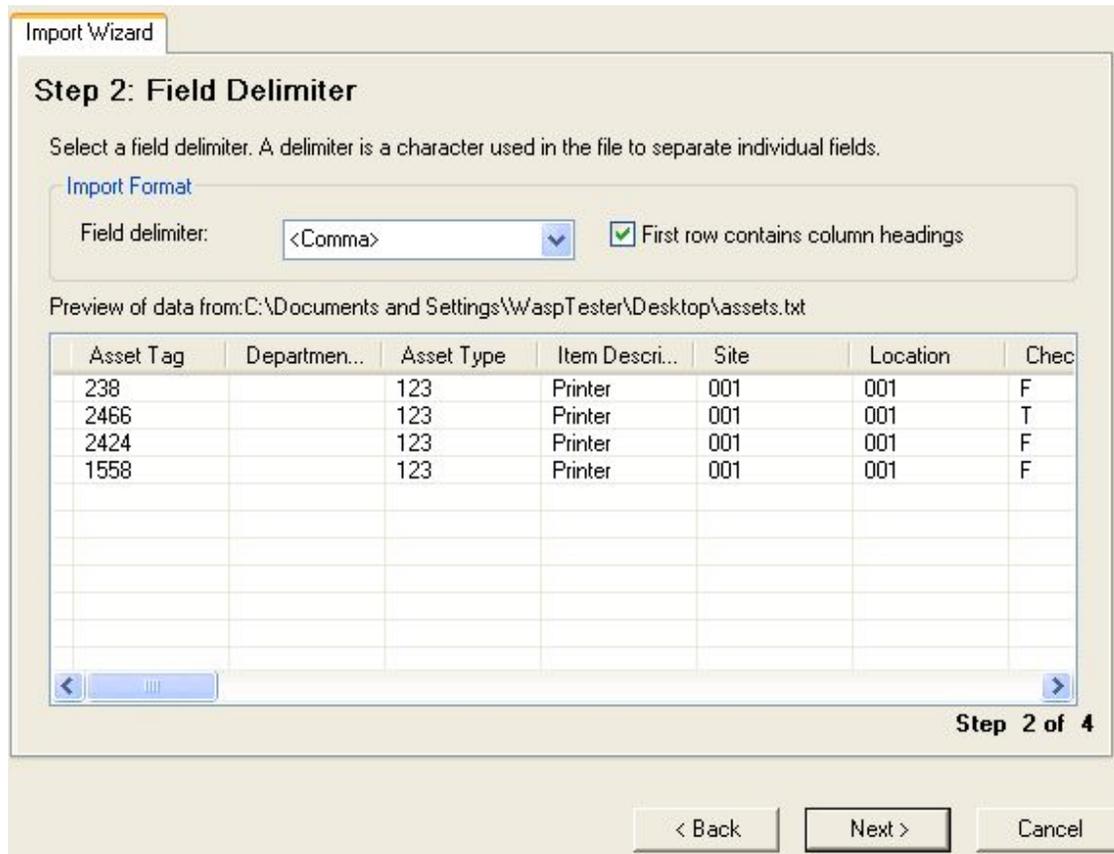
You must strip out all currency symbols, including (but not limited to) these examples: \$, ¢, ¥, £, §, or ¤, if you are about to import them into a numeric field, such as Purchase Cost, Salvage Value, etc. They are permissible in text fields.

Commas, sometimes used as "thousands" separators, should be removed from numeric fields. Commas are permissible in text fields only when residing within a pair of double quotes, which will cause them to be treated as normal text, not as field delimiters.



- Step 2 of the wizard allows you to specify how you want your information broken up in the export file. This is called the **Field Delimiter**. Make your selection from the Field Delimiter drop down list, then select the checkbox if you want to include field names in the first row of your export file. Select the **First row contains column headings** option only if the first record of the file you are importing does not contain actual data. The software cannot remove subtotals, section headers, nor any other records within the file that do not match the format of the actual data records. These must be removed before you attempt the import.

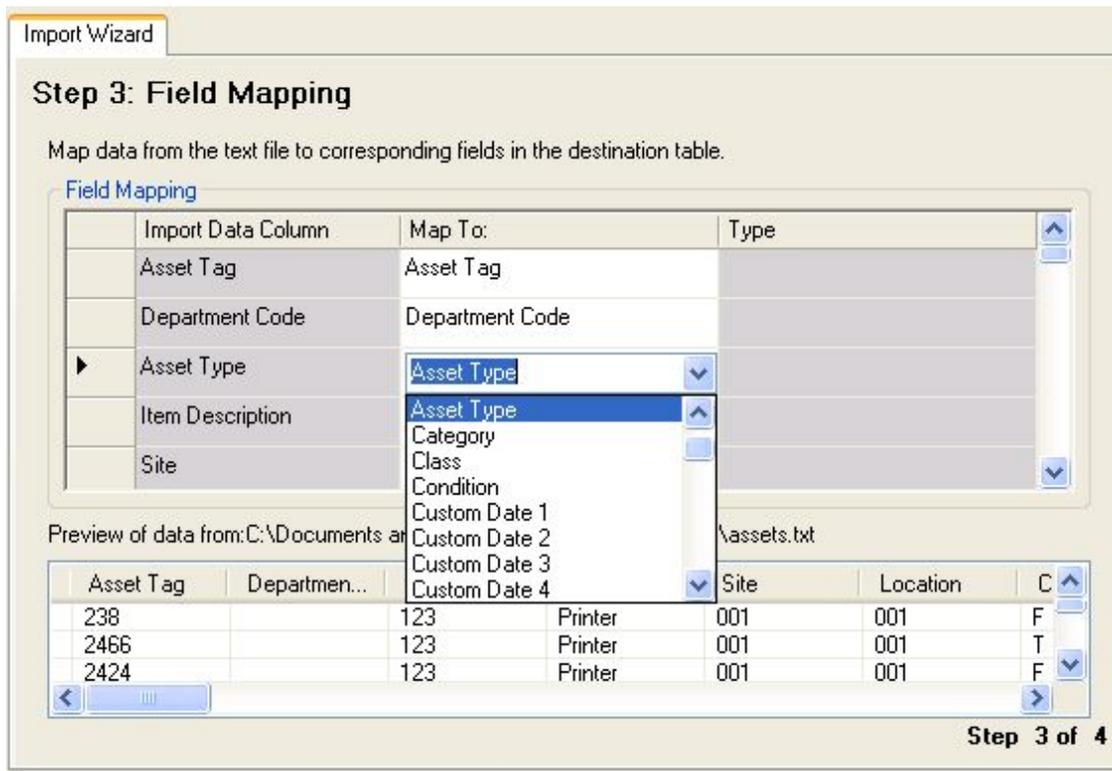
The **Preview of data from table** grid displays the information using the selected delimiter, as shown below. If all the data is in one column of the preview pane, you have not selected the right Delimiter.



- Next, the **Field Mapping** screen appears. This screen allows you to associate columns in your imported data file with corresponding fields in the table into which you are importing the data. Depending on the contents of your original database, not every column in your imported data needs to be mapped to a corresponding field in the software. The object is to bring over at least the required fields and any others that may be of use.

Note: Your .csv or .txt file may have column headers with names that do not exactly match field names the way this example data does. By mapping the imported data's columns to each table's columns, any difference in field names can be accommodated.

Select the appropriate **Map To** field names by clicking on a field in the **Import Data Column**, then selecting from the resulting drop down list, then click **Next** to continue.



If you failed to map columns for one or more of the table's required fields, you will receive a prompt like this:



- When all the required fields have been mapped correctly, click **Finish**. A confirmation message will appear when the file has imported correctly.

Click **OK** and then **Close** to exit the Import Wizard.

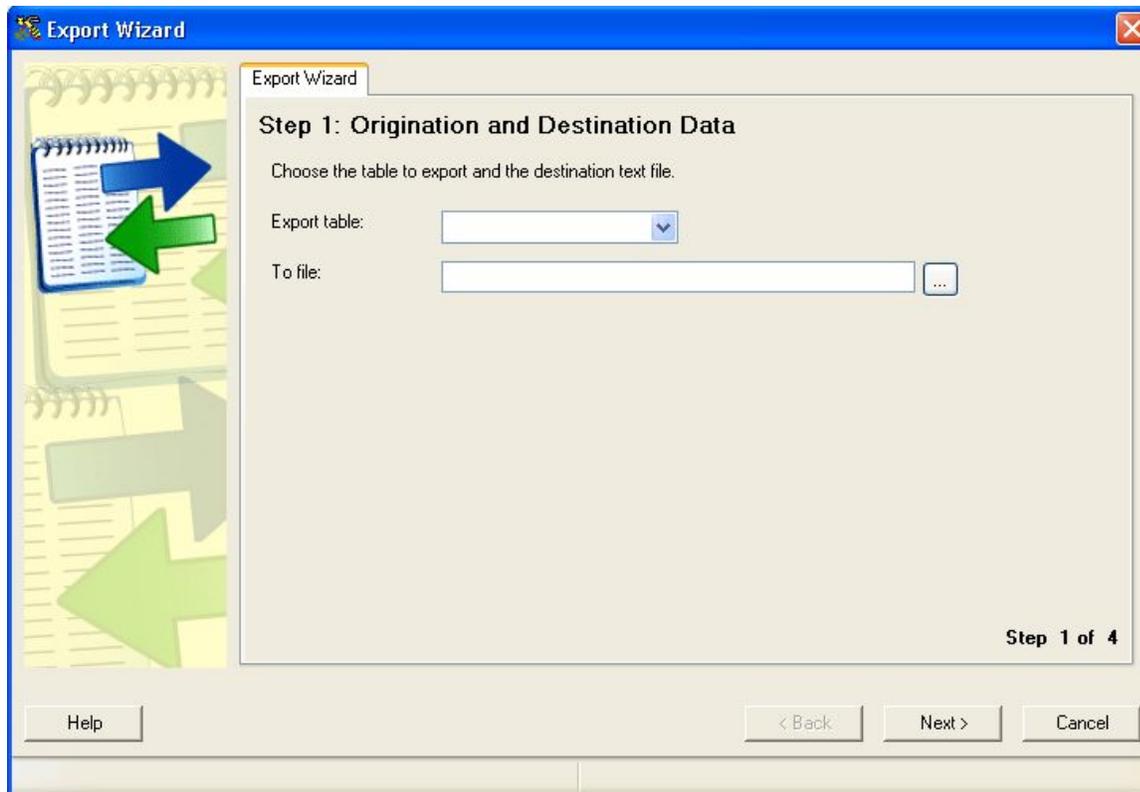
You can confirm that the data imported correctly by checking the List screens (From the **Main** screen, click **List Forms** > < list screen name >).

Export Wizard

The **Export Wizard** allows you to create text files containing data from one or more fields within each of the software's database *tables* (*Information you enter into each field in MobileAsset is stored in a database "table" behind the scenes. You can extract this information using the Export Wizard.*). As this function is in a wizard form, the screens will guide you through each step of the export process.

Exports can be done from the following tables: Vendor, Manufacturer, Depreciation Class, Asset Type, Department, Site, Location, Asset, Customer and Employee.

1. To access the **Export Wizard**, from the **Main** screen click **Administration > Import/Export > Export Wizard**. The **Export Wizard** screen appears.



2. Select what type of information you want to export from the **Export Table** drop down list. In the example below, **Customer** is chosen.

You also need to identify the file to which you want to export information. This can be an existing text file or you can create a text file now. Use the ... button to open a Windows Explorer window to search for a file. You can only export to a text (.txt or .csv file).

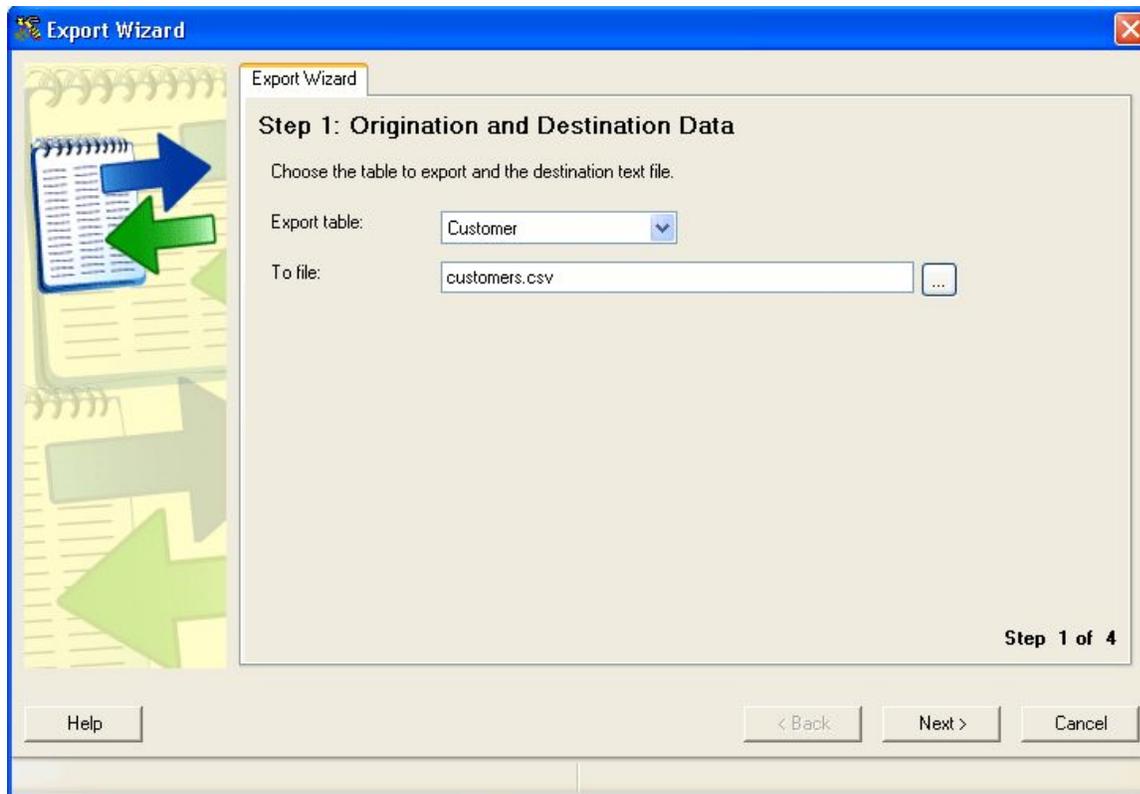
What is a .csv file? This is a type of data format, in which each piece of data is separated by a comma. This is a popular format for transferring data from one application to another, because most database systems are able to import and export comma-delimited data.

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:

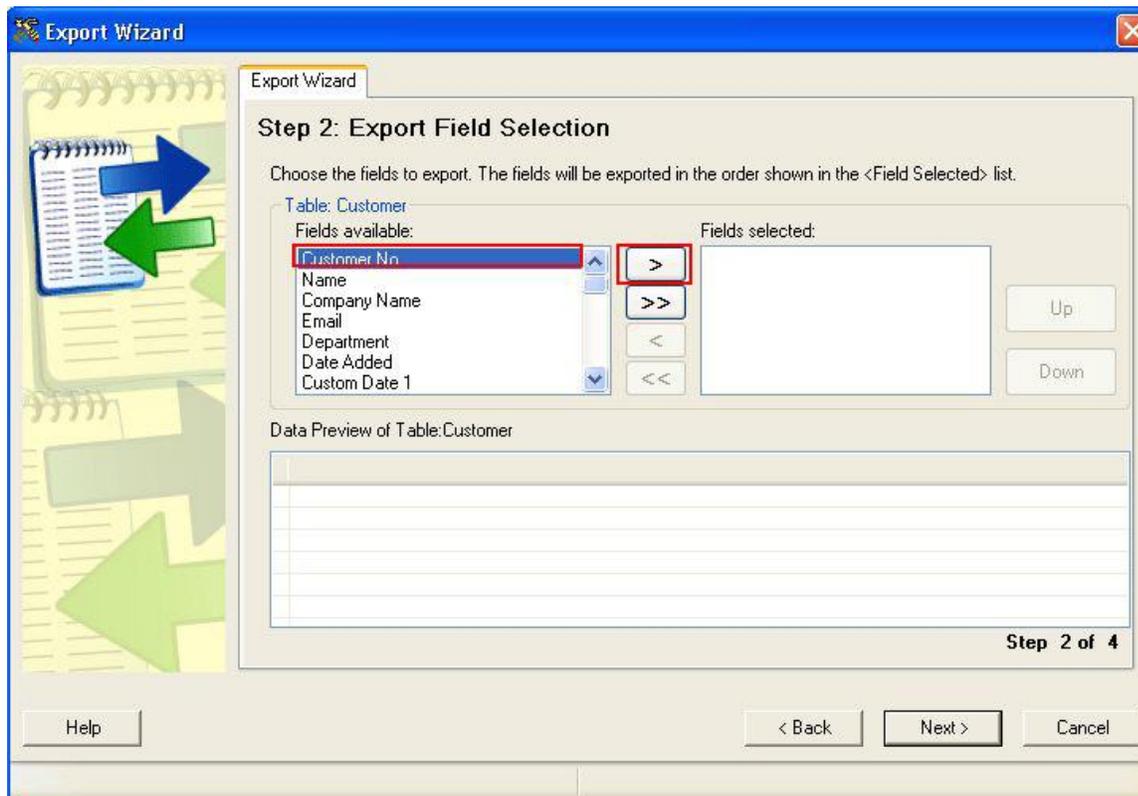
```
Adams, Jane, 46, female, New York
Doe, John, 32, male, California
Jones, Sam, 13, male, Texas
Smith, Mary, 64, female, Louisiana
```

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

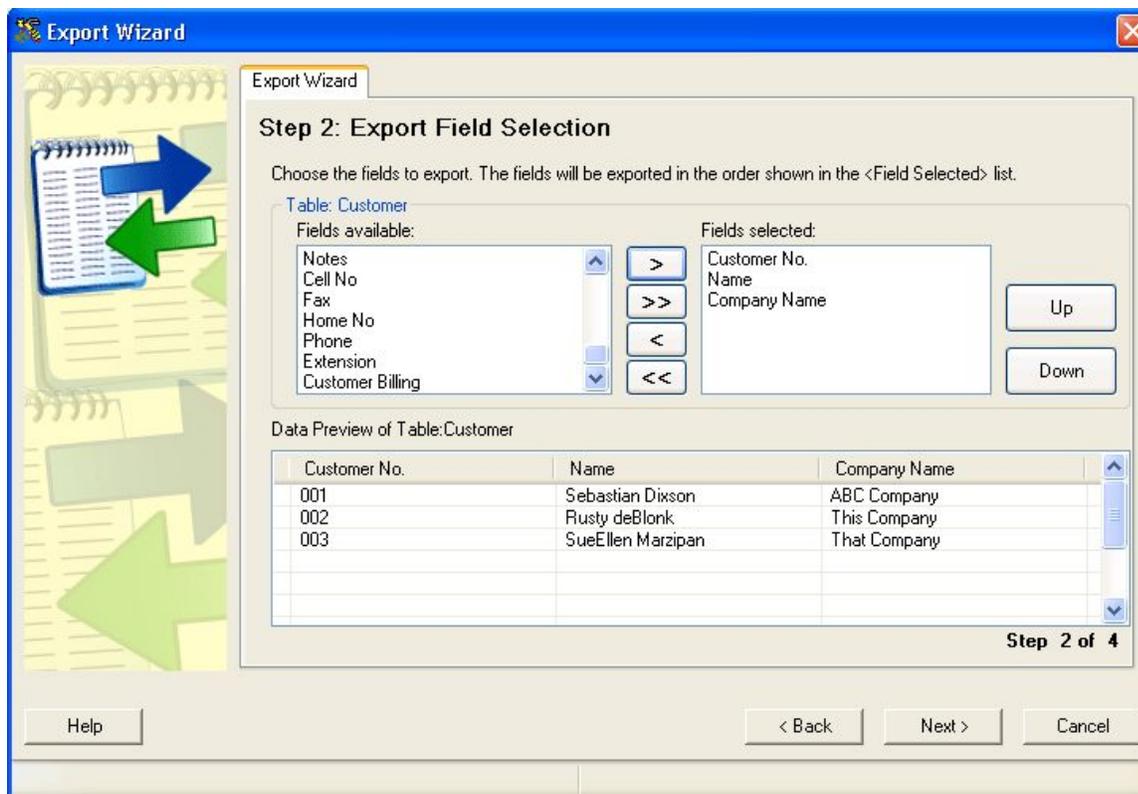
Click the **Next** button to continue using the Export Wizard.



3. The **Export Field Selection** screen appears next. This screen allows you to select from which of the table fields you want to pull information. All fields available in the table you selected on the previous screen appear in the **Fields Available** box. Highlight a listing, then click the Right Arrow button to move it to the **Fields Selected** box. You can move all fields by clicking the Double Right Arrow button. This box does support multiple selections so you do not have to move one field at a time.



The data that appears in the fields you moved to the **Fields Selected** box appear in the **Data Preview of Table** grid.



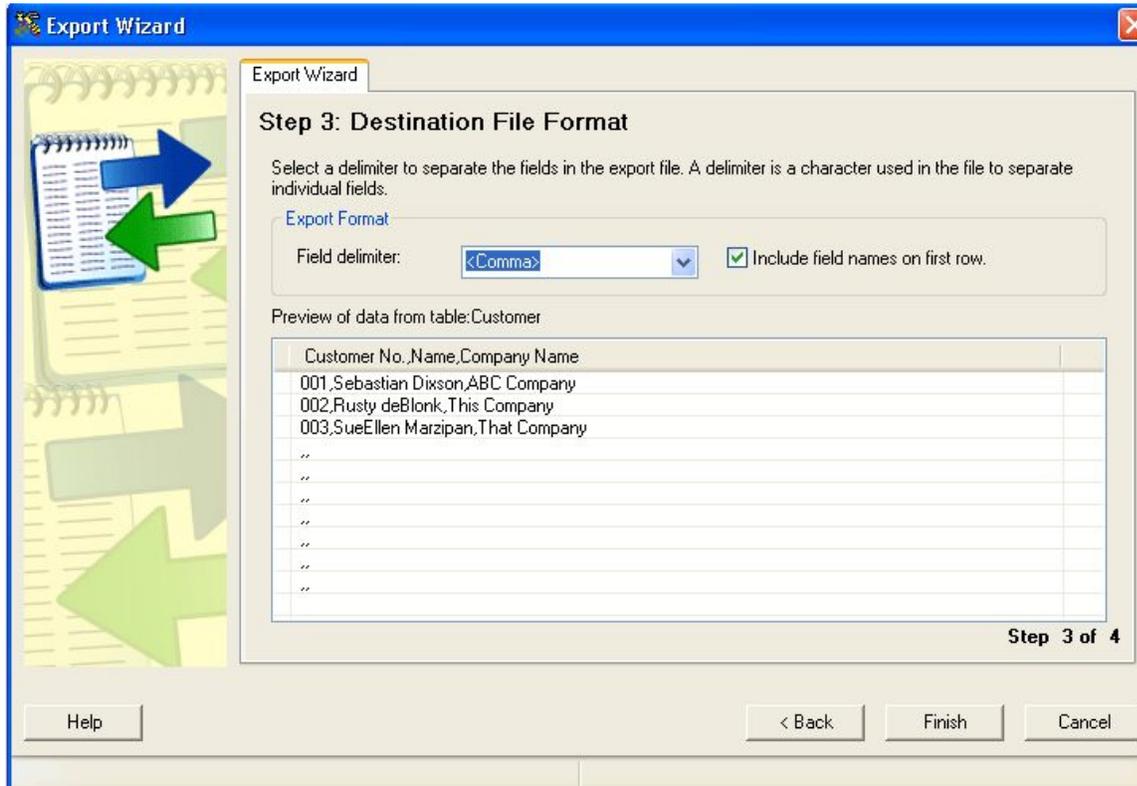
You can move fields out of the **Fields Selected** box by highlighting a field in the box, then clicking the Left Arrow button as shown below.

When you are finished selecting the fields you want to Export, click the **Up** or **Down** buttons next to the Fields Selected box to reorder how the information will appear in your export file.

Click **Next** to continue.

- The **Destination File Format** screen allows you to specify how you want your information broken up in the export file. This is called the **Field Delimiter**. Make your selection from the Field Delimiter drop down list, then select the checkbox if you want to include field names in the first row of your export file.

The Preview of data from table grid displays the information using the selected delimiter, as shown below:



If the file name you specified in Step 1 uses the extension **.CSV**, you must specify **<Comma>** as your field delimiter (this is the default).

If you specified a file name with the extension of **.TXT** in Step 1, you may use any of the field delimiters available in the drop list (as long as the chosen character does not occur within the data itself.)

The available options are shown below:



- Click the **Finish** button to Export your selection. A confirmation message will appear when the export is completed successfully.

You can confirm the export by opening and reviewing the **.csv** or **.txt** file you specified in Step 1.

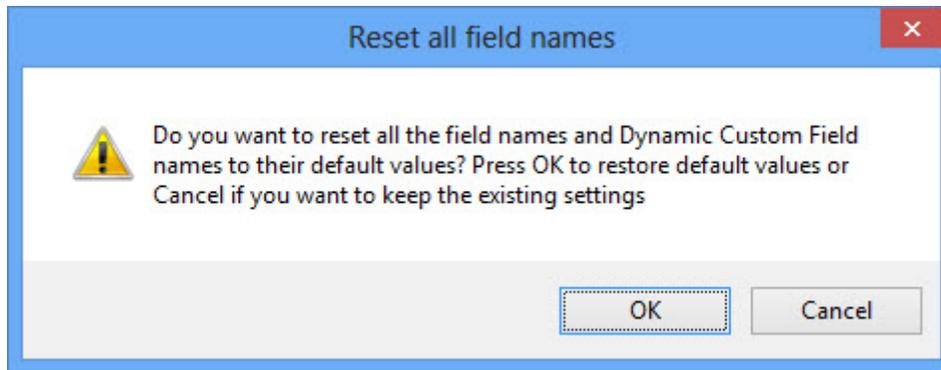
2.12.6 Customize Names

Reset All Field Names

The software provides you with the ability to customize the application to fit your business needs. After you have changed field/function names, you can quickly return all values to their original, or default, values in one, quick step.

1. To reset all field names to their default values, from the **Main** screen click **Administration > Customize Names > Reset All Field Names**. (Only users set up with **Administrative Privileges** in **Security** can perform this function.)

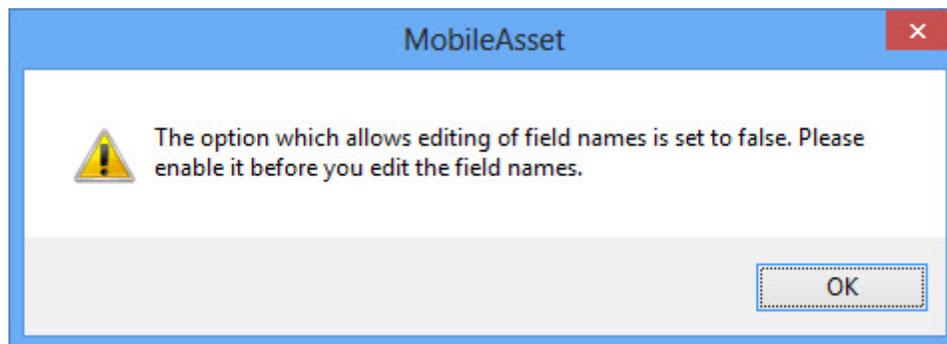
The message shown below will display:

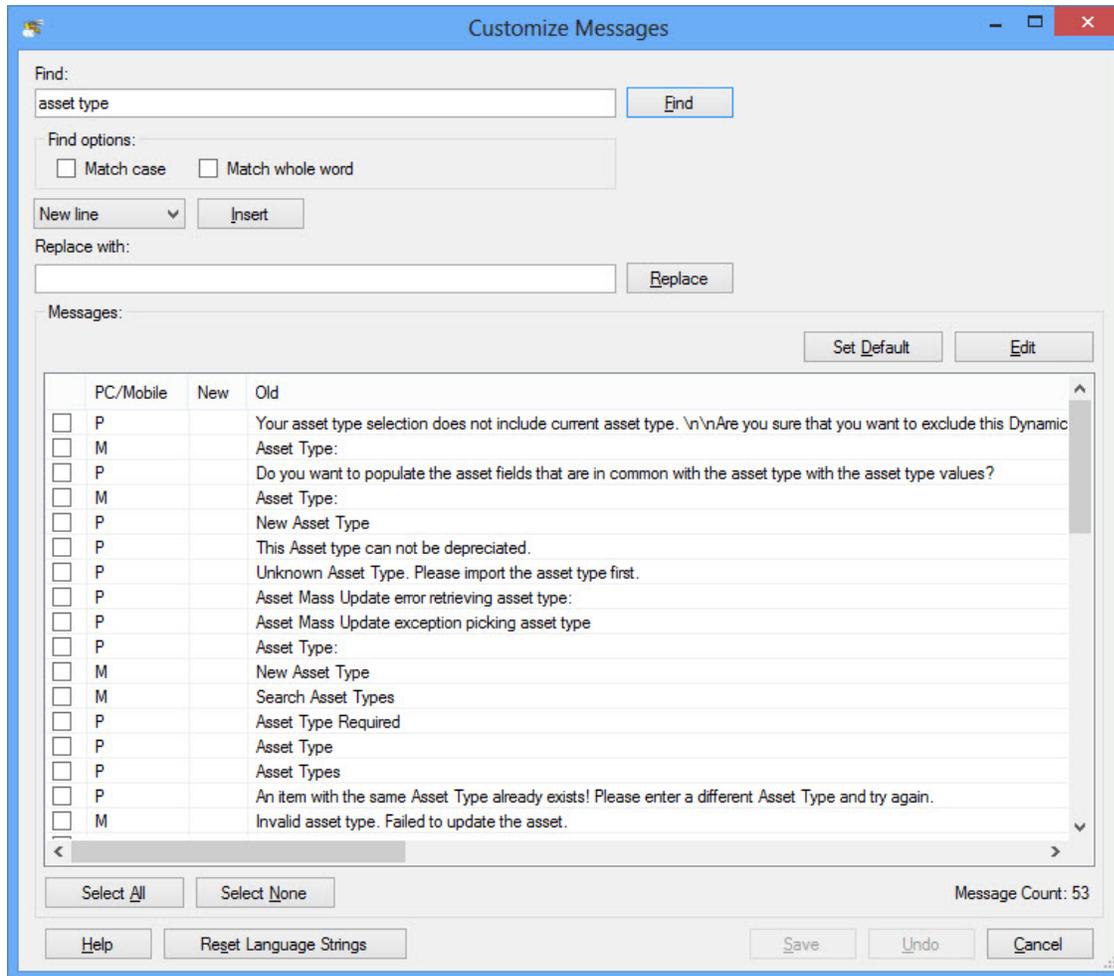


All fields names and all [Dynamic Custom Field](#) names will be reset to their default values.

2. Click **OK** to restore label default values or **Cancel** if you want to keep the existing settings.

Reset All Field Names is displayed in the **Customize Names** menu even when the [Edit Field Names](#) option is disabled or the current user lacks administrative privileges. If **Reset All Field Names** is selected under these circumstances, the following message will be displayed:





Note that the **Message Count** appears in the bottom, right corner of the screen. In the example above, the **Message Count** is 53. This means that 53 language strings containing the text entered in the **Find** field were found.

This list contains several columns:

PC/Mobile - The PC/Mobile column indicates if the listed string appears on the PC application or on the Mobile Device application.

New - The New column appears blank at this point. After you make a change to a string, your new text will appear here.

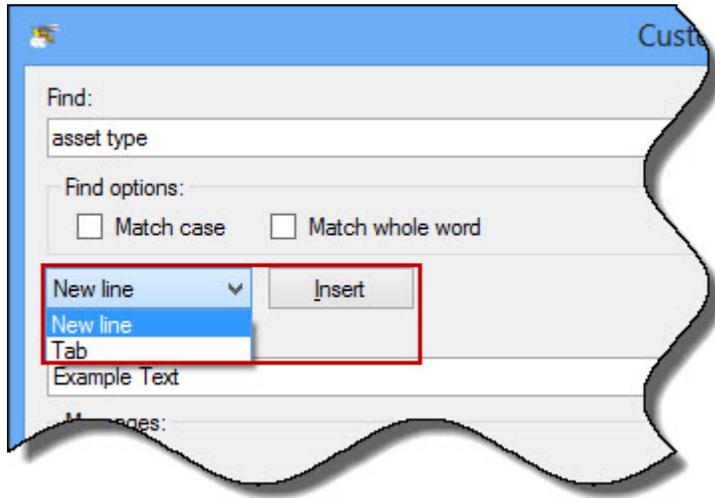
Old - The Old column lists the text as it appears prior to this change.

Default - This column displays the text as it appeared by default.

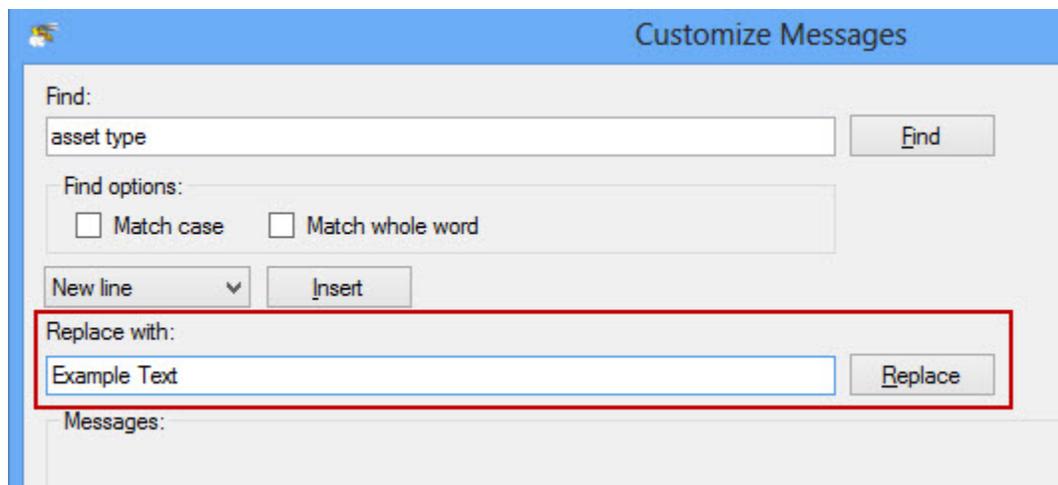
Label - The Label column displays the internal label for this language string.

- Put a check mark next to the strings you want to change by clicking in the checkbox in the left column. You can also **Select All** or **Select None** using the buttons at the bottom of the screen.
- After making your selections, enter the new text in the **Replace with** field.

You can add a tab or add new line to your message by selecting from the drop down box, then click the **Insert** button. You can optionally use the newline and tab characters in the text box to add these attributes. To add a new line, enter `\n` in front of the word before which you want to start the new line. For example, enter `"/never"` to being a new line beginning with the word "ever". For tabs, enter `\t` before the word or character you want the tab.

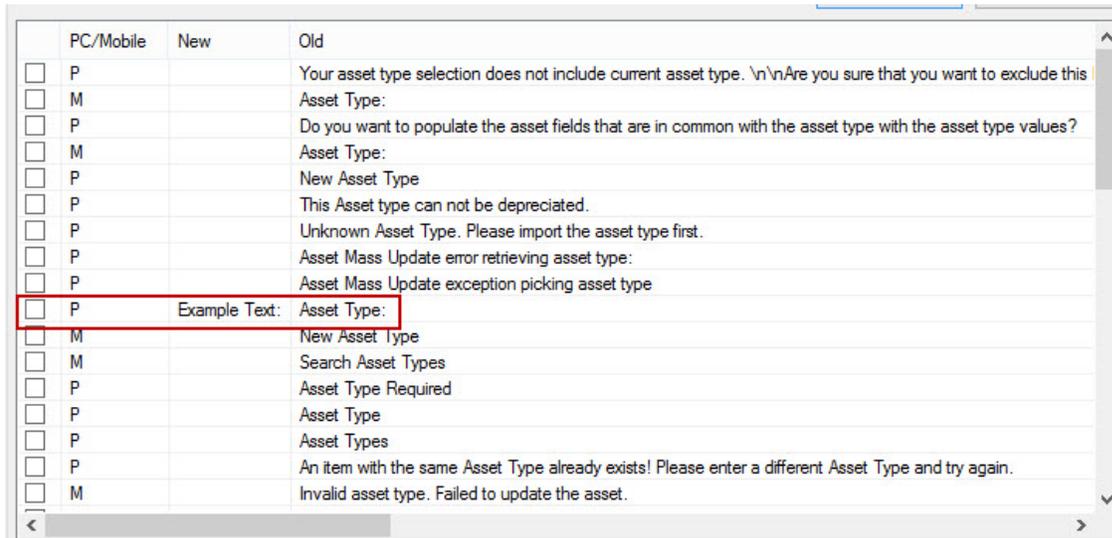


5. Click the **Replace** button when you are done entering text.



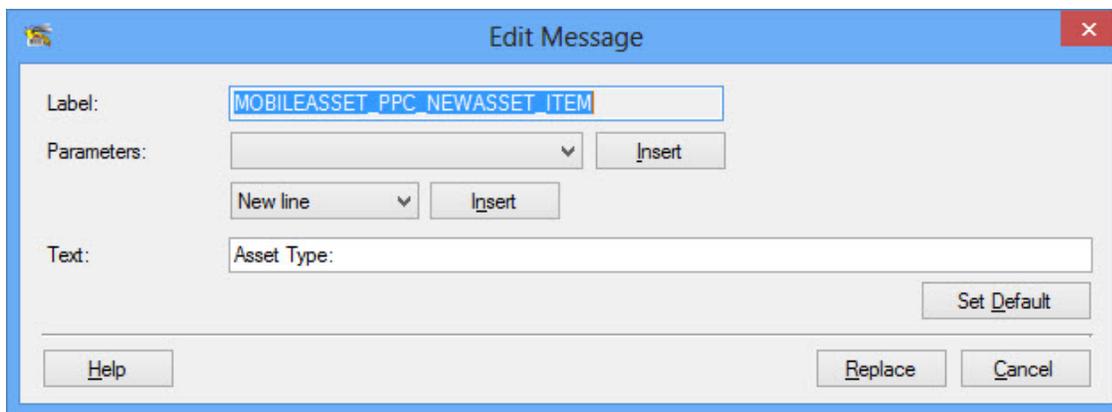
The software will replace the selected language strings with your text.

In the example below, we replaced the language string Asset Type: with the text Example Text:.



This means that wherever this language screen appears in the PC application, the customized text "Example Text" will appear.

You can alternatively select only one language string, then click the **Edit** button. The **Edit Message** screen appears.



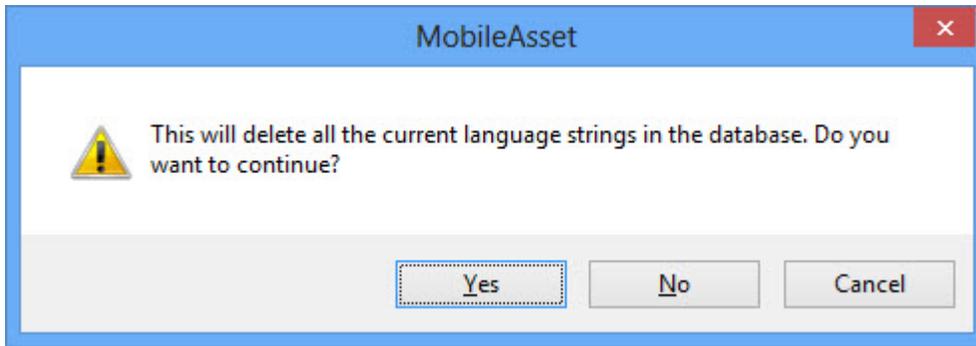
This screen has the same functionality found on the **Customize Messages** screen. Use the **Parameters** drop down menu to select the required message parameters for the message string, then click **Insert**.

6. If you want the new text to become the default, click the **Set Default** button.
7. Click **Save** to save your changes.

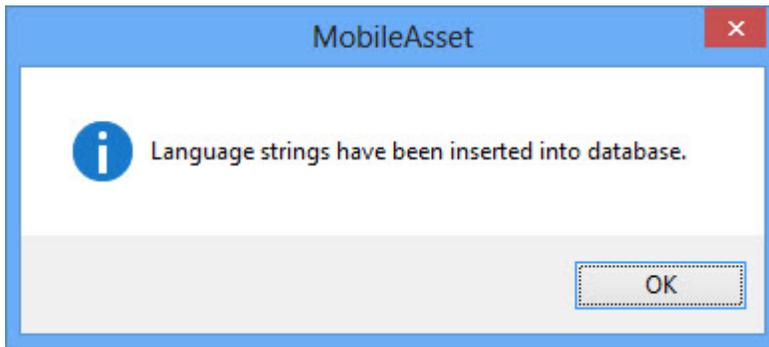
Click **Undo** to undo your most recent change. You can undo up to the last 5 changes.

Reset Strings to Default

1. Click on the **Reset Language Strings** button to reset all language strings in the database back to their default settings. When this button is clicked, the following screen appears:



2. Click **Yes** on this screen to delete the current strings and replace them with the default strings. The following screen appears:



3. Click **OK** on this screen. The strings window on the **Customize Message** screen will show the default messages after you close and reopen the screen.

Customize Report Names

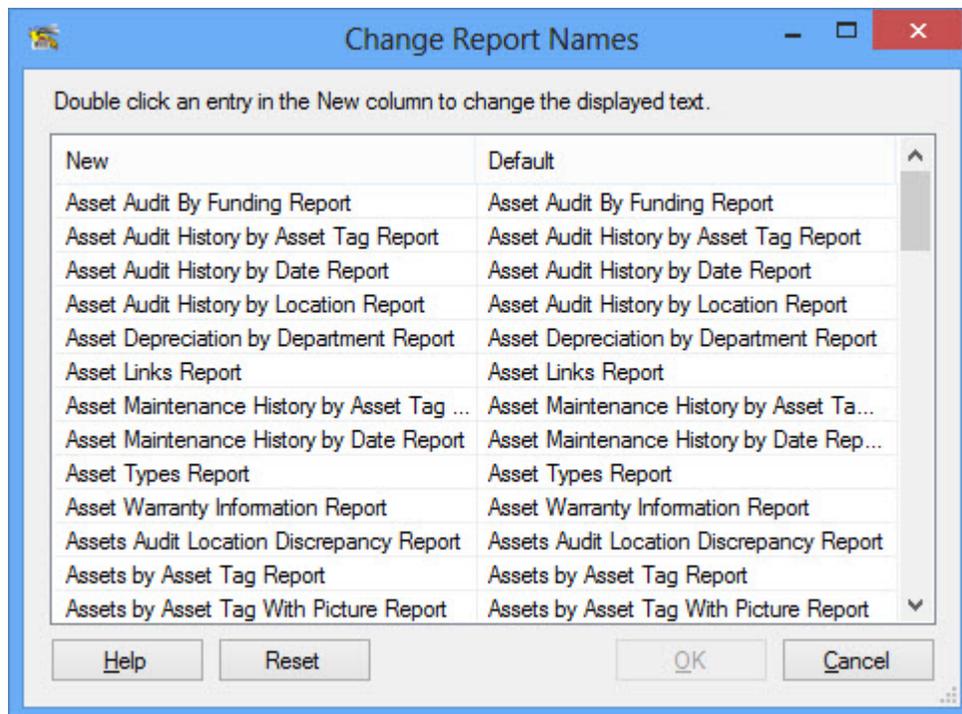
The **Customize Report Names** feature allows you to change the names of the reports in MobileAsset. This enables you to have continuity in nomenclature across MobileAsset if you have changed other elements, such as messages and field names.

[Customize Report Names](#)

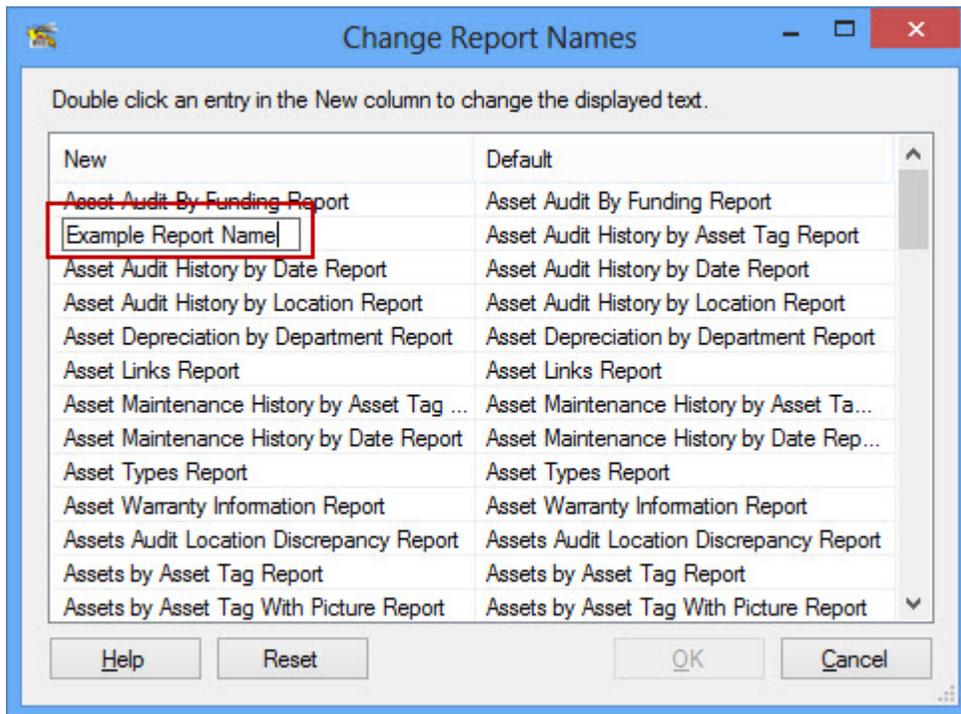
[Reset Report Names](#)

Customize Report Names

1. From the **Main** screen, select **Administration > Customize Names > Customize Report Names**. The **Change Report Names** screen appears.



2. Double click on a listing in the **New** column. A text box will appear allowing you to type in a new report name.



3. Click out of the field to enable the **OK** button. Continue changing report names as needed. Click the **OK** button when you are done. Now the **Reports** menu will show the new report name.

Reset Report Names

The **Reset** function resets any changed report names back to their default values.

1. From the **Main** screen, select **Administration > Customize Names > Customize Reports**. The **Change Report Names** screen appears.
2. Click the **Reset** button at the bottom of the screen.

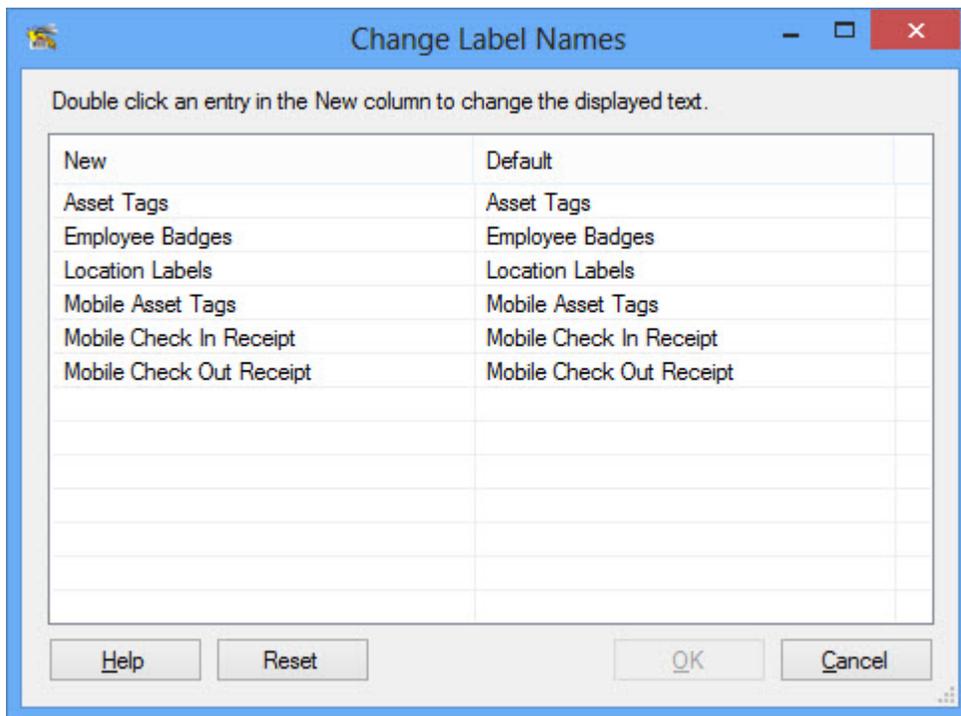
Customize Label Names

The **Customize Label Names** feature allows you to change the names of certain labels, such as Asset Tags, Employee Badges and Location Labels. This enables you to have continuity in nomenclature across MobileAsset if you have changed other elements, such as messages and field names. For example, if you have renamed Assets to Books, you can use this feature to change the label Asset Tags to Book Tags.

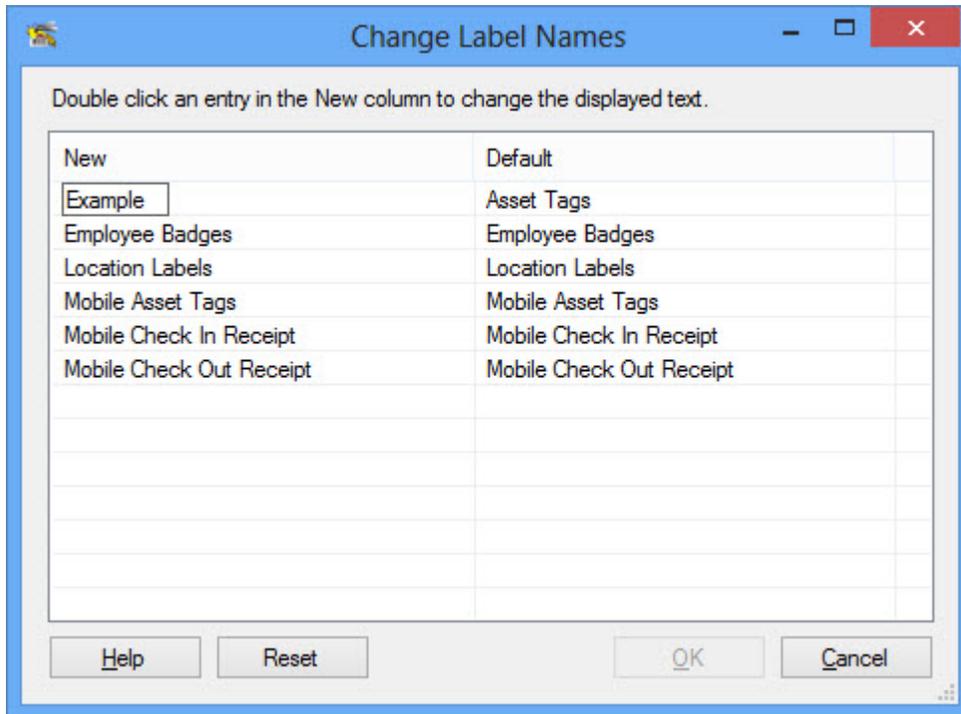
[Customize Label Names](#)
[Reset Label Names](#)

Customize Label Names

1. From the **Main** screen, select **Administration > Customize Names > Customize Label Names**. The **Change Label Names** screen appears.



2. Double click on a listing in the **New** column. A text box will appear allowing you to type in a new label name.



3. Click out of the field to enable the **OK** button. Continue changing label names as needed. Click the **OK** button when you are done. Now any screens/menus that display the label will show the new name.

Reset Label Names

The **Reset** function resets any changed label names back to their default values.

1. From the **Main** screen, select **Administration > Customize Names > Customize Labels**. The **Change Label Names** screen appears.
2. Click the **Reset** button at the bottom of the screen.

Customize Element Names

The **Customize Element Names** feature allows you to change the names of menu labels in MobileAsset.

[Customize Element Names](#)
[Reset Element Names](#)

Customize Element Names

1. From the **Main** screen, select **Administration > Customize Names > Customize Element Names**. The **Change Element Names** screen appears.

New	Default
Asset Type	Asset Type
Audit	Audit
Check In	Check In
Check Out	Check Out
Customer	Customer
Department	Department
Depreciation Class	Depreciation Class
Dispose	Dispose
Employee	Employee
Asset	Asset
Funding	Funding
Location	Location

2. Double click on a listing in the **New** column. A text box will appear allowing you to type in a new element name.

New	Default
Example	Asset Type
Audit	Audit
Check In	Check In
Check Out	Check Out
Customer	Customer
Department	Department
Depreciation Class	Depreciation Class
Dispose	Dispose
Employee	Employee
Asset	Asset
Funding	Funding
Location	Location

3. Click out of the field to enable the **OK** button. Continue changing report names as needed. Click the **OK** button when you are done. Now the new menu labels will be displayed. name.

Reset Element Names

The **Reset** function resets any changed elements names back to their default values.

1. From the **Main** screen, select **Administration > Customize Names > Customize Element Names** . The **Change Element Names** screen appears.
2. Click the **Reset** button at the bottom of the screen.

Edit Field Names

When the [Edit Field Names](#) option on the **Options** screen is enabled (accessed from the **Main** screen by selecting **Administration > Options**) a user setup in the Admin Group in Security can use the **Edit Field Names** feature.

This method of customization allows you to change the name of labels on various screens. For example, you can use this method to change the label "Asset Type" when it appears on screens such as New/Edit Asset and New/Edit Asset Type. Changing the label name using this method will not change the label Asset Type on menus or on Reports. You will need to use the [Customize Label Name](#) and [Customize Report Name](#) functions to make those changes.

1. Make sure you have turned on the [Edit Field Names](#) option on the **Options** screen (**Administration > Options**). Any field names that can be edited will appear as blue hyperlinks on the screen. For example, on the **New Asset** screen, the field names that can be edited appear as shown below:

The screenshot shows the 'New Asset' form with the following fields and their labels (some are blue hyperlinks):

- Asset Tag: [Asset Tag:](#)
- Asset Description: [Asset Description:](#)
- Site: [Site:](#)
- Location: [Location:](#)
- Department Code: [Department Code:](#)
- Serial No: [Serial No:](#)
- Condition: [Condition:](#)
- Hyperlink: [Hyperlink:](#)
- Additional Info: [Additional Info:](#)
- Asset Type: [Asset Type:](#)
- Asset Type Description: [Asset Type Description:](#)
- Manufacturer: [Manufacturer:](#)
- Model: [Model:](#)
- Vendor Number: [Vendor Number:](#)
- Checkout Length: [Checkout Length:](#)
- Lead Time: [Lead Time:](#)
- Depreciation Class: [Depreciation Class:](#)
- Category: [Category:](#)

The form also includes a 'General' tab and other tabs like 'Asset Linking', 'Depreciation', 'Picture', 'Attachments', 'Maintenance', 'Contracts', 'Funding', 'Transaction History', 'Custom Fields', and 'Dynamic Custom Fields'. At the bottom, there are buttons for 'Help', 'Pin All', 'Print Tag On Save - Copies: 0', 'Save', and 'Close'.

2. To edit a field, click on the label you want to edit. In the example above, if you want to change the field name **Asset Type**, click on it. A screen similar to the following appears:

The screenshot shows a 'Customize Field' dialog box with the following details:

- New Name:** Asset Type
- Form:** Asset
- Tool tip:** Type of Asset
- Visible
- Required
- Send To Mobile Device
- Buttons:** Set To Default, Help, OK, Cancel

3. Type in the **New Name** and an optional **Tool tip**. Tool Tips provide special instructions to your users when they hover their mouse over the field.
4. Some customizable fields do not permit the use of the **Visible** and **Required** options - they will be grayed-out. This is because these fields must be both visible and required for normal operations.

De-selecting the **Visible** option completely removes the field from the forms where it occurs. This can be used to streamline data input operations by removing the distraction of unused fields.

Selecting the **Required** option makes data entry mandatory for transactions that use that field. The **Visible** option will be grayed-out when the Required option is selected.

5. If you want to send the edited field name to the mobile device, select the **Send to Mobile Device** checkbox. The next time you perform a full sync (including downloading data from the PC) the edited name will be sent.
6. To return the field name/tool tip to the default values, click the **Set to Default** button.
7. Click the **OK** button to save your changes. Be aware that you are only changing the field name for the current screen. Other screens that contain a field with the same label will not be changed.

The **Customize Field** screen can be accessed by clicking on hyperlinked customizable fields that can be found in the Create New Asset, Create New Asset Class, Create New Customer, Create New Department, Create New Employee, Create New Asset Type, Create New Location, Create New Manufacturer, Create New Site, [Create New Funding](#) and Create New Vendor forms, as well as the Edit Asset, Edit Asset Class, Edit Customer, Edit Department, Edit Employee, Edit Asset Type, Edit Location, Edit Manufacturer, Edit Site, [Edit Funding](#) and Edit Vendor screens.

2.12.7 Set Default Working Site

You can designate Source and Destination sites (or locations, if your version only allows one site) that appear by default on the New Asset, Check Out, Check In, Audit, Dispose and Move screens using the **Set Default Working Site** screen. MobileAsset allows you to work with more than one Site and multiple Locations within each Site.

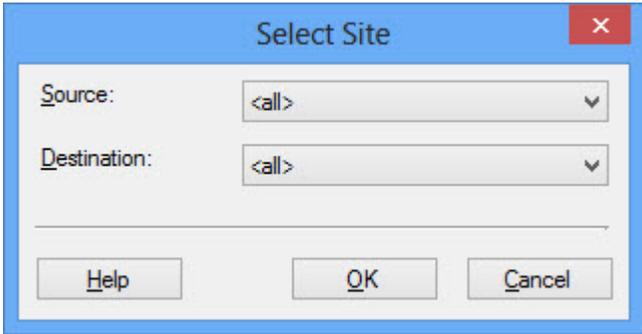
When MobileAsset's functionality is not restricted to a single site, users must remain mindful of which site they are working with as transactions are performed.

Source will determine the default location in the Location field of the New Asset, Check Out, Check In, Audit and Dispose screens. It will also determine the default location in the From Location field of the Move function.

Destination will determine the default location in the Move function's To Location field.

By default, all sites are allowed.

1. To set the source and destination sites, from the **Main** screen, click **Administration > Set Default Working Site**. The **Select Site** screen appears:



The image shows a dialog box titled "Select Site" with a blue header and a red close button. It contains two dropdown menus: "Source:" and "Destination:", both set to "<all>". Below the dropdowns are three buttons: "Help", "OK", and "Cancel".

2. Make your selections from the drop down lists. All sites you have entered into the database will appear in the list.
3. Click **OK** when you have made your selections.

2.12.8 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 Field Names](#)
[Edit Inherited Asset Type Data](#)
[Last Depreciation Date](#)

Support Options:

[Archive Processed Mobile Data](#)
[Check for Software Updates](#)
[Close New Form](#)
Create Employee
[Max Row Count](#)
[Show Warning Messages](#)
[SQL Server Backup Location](#)

Mobile Options:

[Maximum Pictures Captured](#)
[Prompt Full Sync](#)
[Prompt Upload](#)
[Require a Signature on Device?](#)

Email Options:

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

Alert Options:

[Alerts CC Emails](#)
[Alerts Email Body Text](#)
[Alerts Email Subject Text](#)
[Alerts To Emails](#)
[Email Alerts](#)
[Maintenance Alerts](#)
[Time to Check for Alerts](#)
[User Name Used for Email Alerts](#)

[Reminder Alert Option](#)

[Email Reminder Alerts](#)

[Reminder Alerts Email Body Text](#)

[Reminder Alerts Email Subject Text](#)

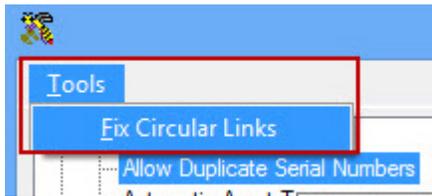
[User Name Used for Email Reminder Alerts](#)

Fix Circular Links

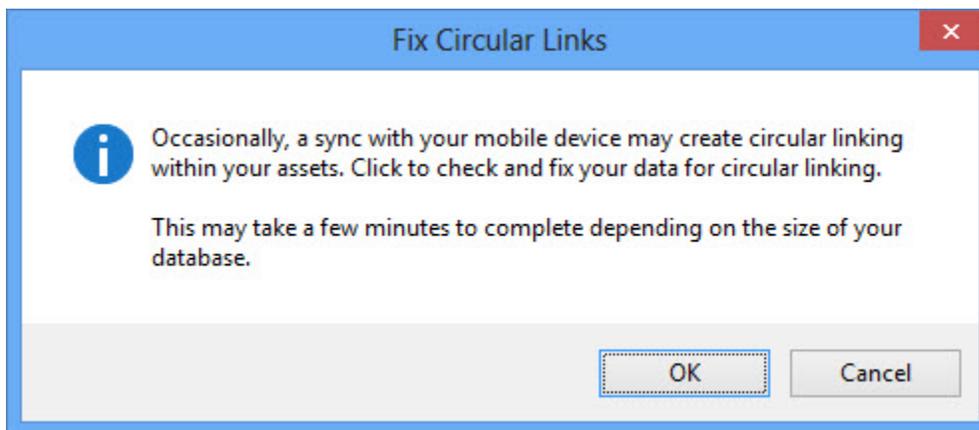
Occasionally circular links are created when syncing data from a mobile device to the PC. For example, you may have Asset A, which is the parent of Asset B. Asset B is the parent of Asset C. When syncing, the application may create a third link making Asset C the parent of Asset A, thus creating a circular link. When you view assets from the **Asset List** or on the **Edit Asset** screen and MobileAsset detects a circular link, the software will attempt to correct the problem. If this fails, or if you want to run a check on all assets and correct all circular links (if there are any) at once, you can use the **Fix Circular Links** tool on the [Options](#) screen.

To Fix Circular Links:

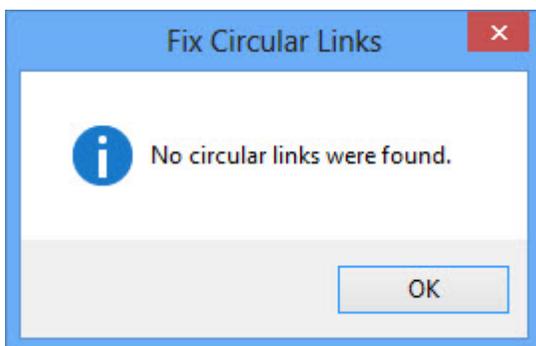
1. From the **Main** screen select **Administration > Options**.
2. On the **Options** screen, select the **Tools** drop down menu, then select **Fix Circular Links**.



The software will review all assets and remove any circular links.



If no circular links are found, the following message appears:



Click **OK** to close the message screen.

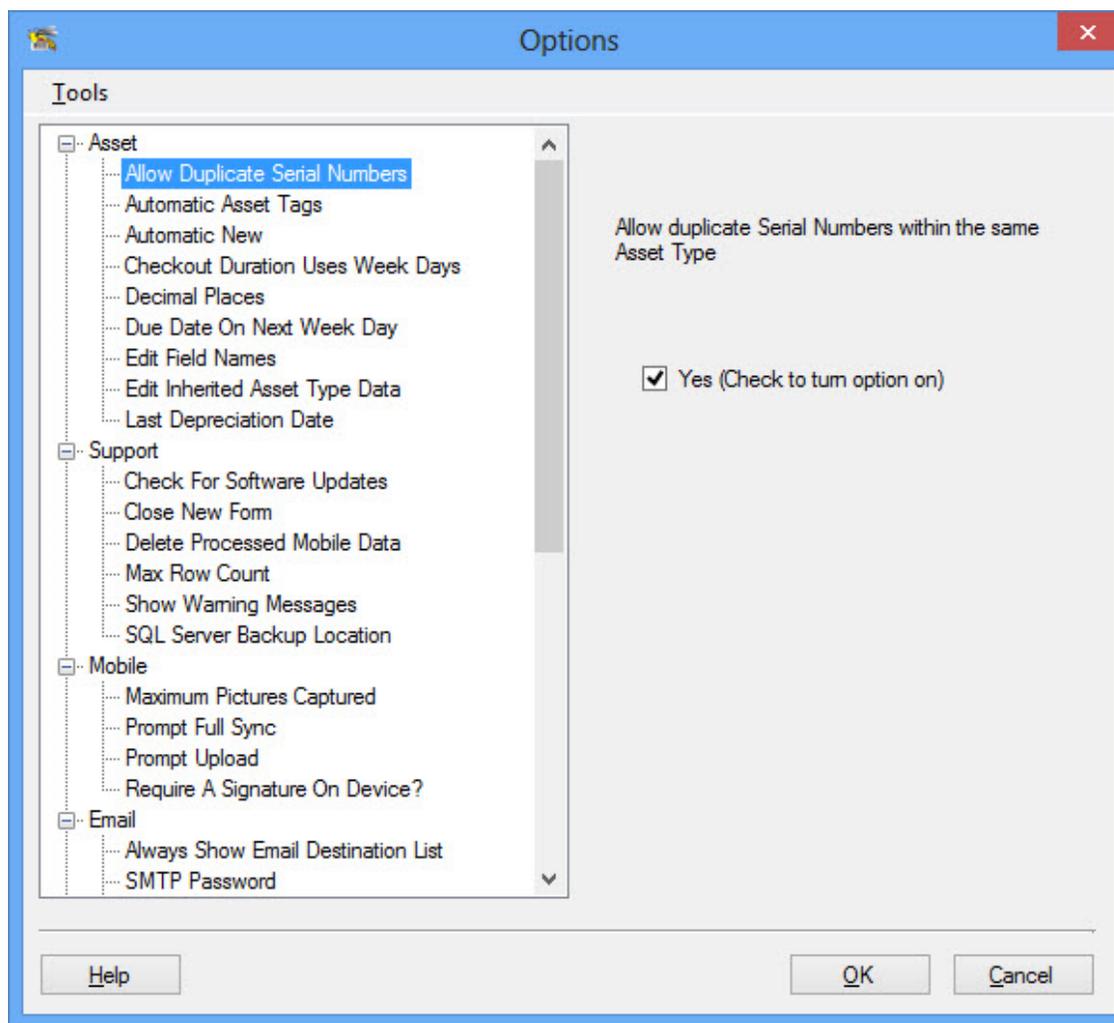
Asset Options

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** screen, 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** check box.
4. Click **OK** to save the options you've changed 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.

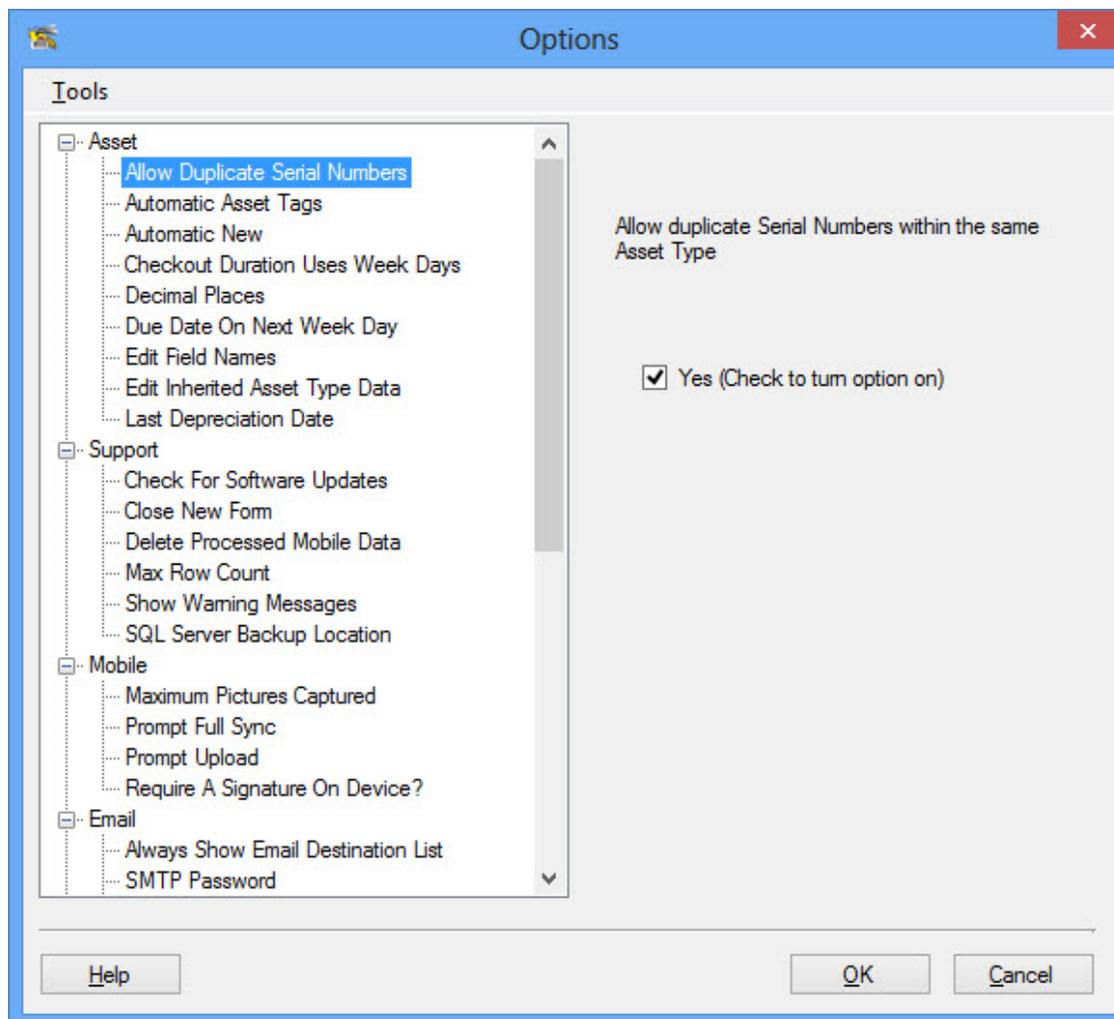
For information on setting the default tag number the system will begin with when assigning asset tags, see the section [Setting the Automatic Tag Numbers](#), below. **This option is turned off by default.**

The following topics are discussed in this section:

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

Turning On the Automatic Asset Tags Feature

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

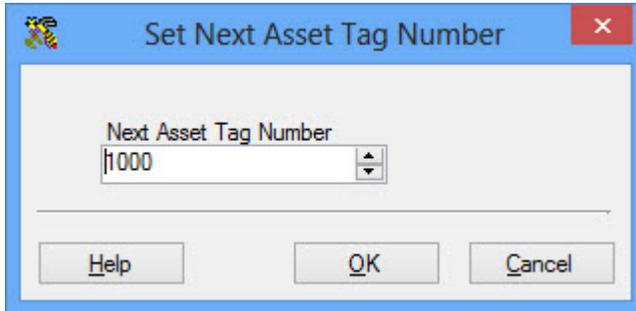


3. Select the **OK** button to implement the features you have chosen and to close the **Options** screen.
-

Setting the Automatic Asset Tag Numbers

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 "1". 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.



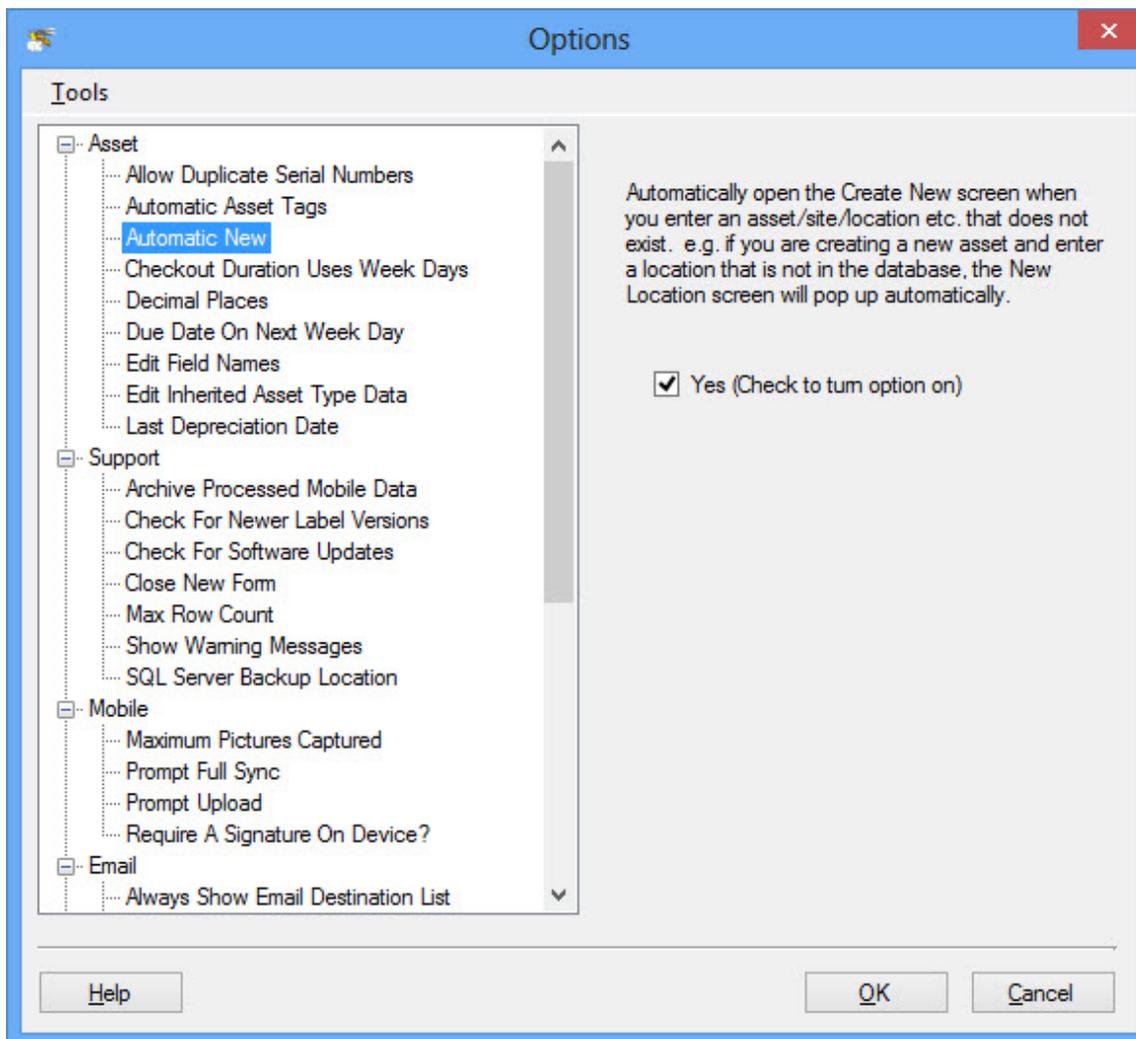
2. Enter the number you want to begin with, then click **OK**.

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** screen, click **Administration > Options**.
2. Highlight the **Automatic New** listing and select the **Yes** checkbox.
3. Click **OK** to save your changes.



Decimal Places

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

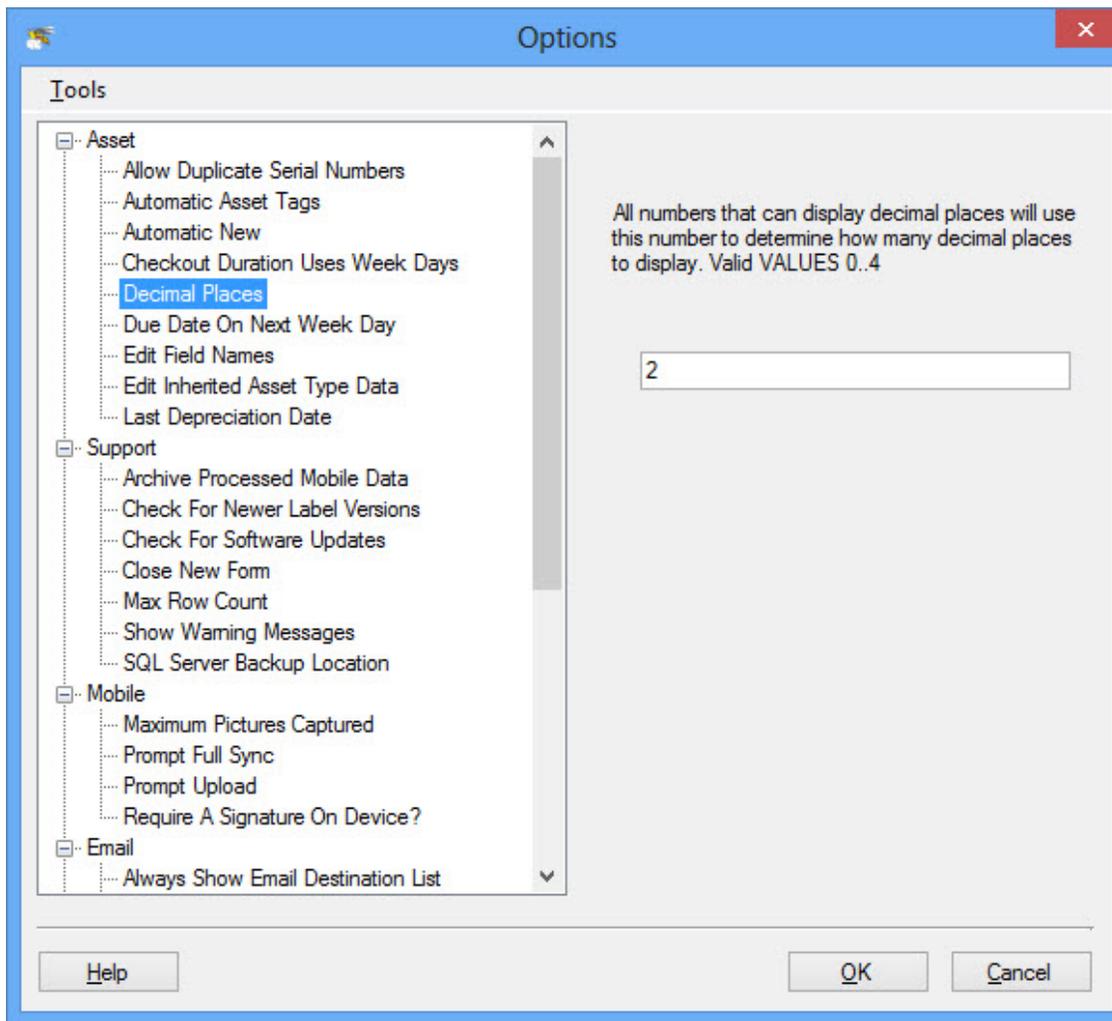
All values entered in numeric fields are stored in the database with up to 4 decimal places. You may not want to display all four decimal places on your list screens and reports, so you can designate the number of decimal places, from 1 to 4, that will display.

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](#)

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 Place 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.)

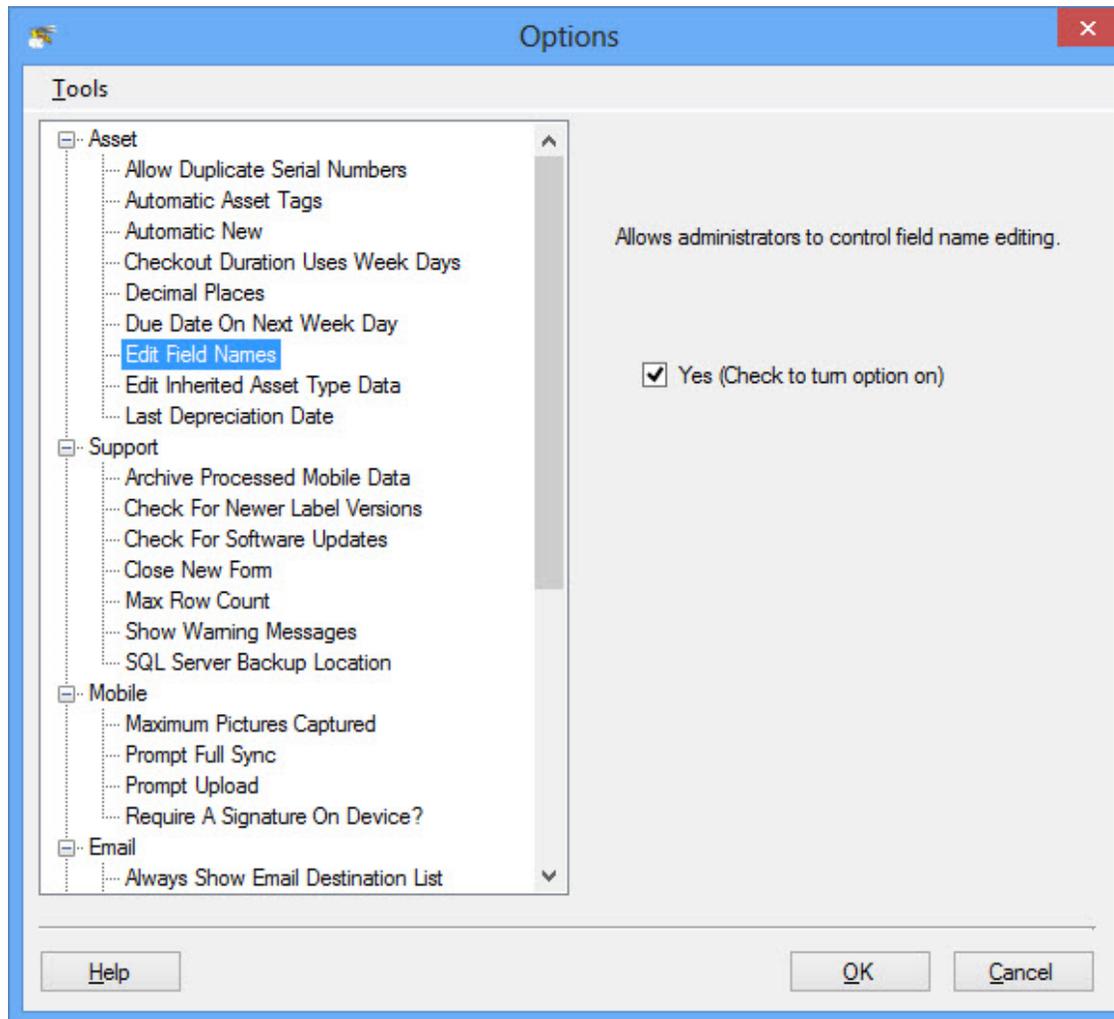
Searching for Data with Truncated Decimal Places

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.

Turning on the Edit Field Names Feature

This feature allows users setup with **Administrative Privileges** in **Security** to change the names of certain fields and functions in the software. This topic covers how to turn this feature on. [For information on how to change field names once the option is active, see the Edit Fields topic.](#)

1. To turn on this feature, from the **Main** screen click **Administration > Options**. The **Options** screen appears.
2. Highlight **Edit Field Names** in the list and make sure the **Yes** check box is selected.



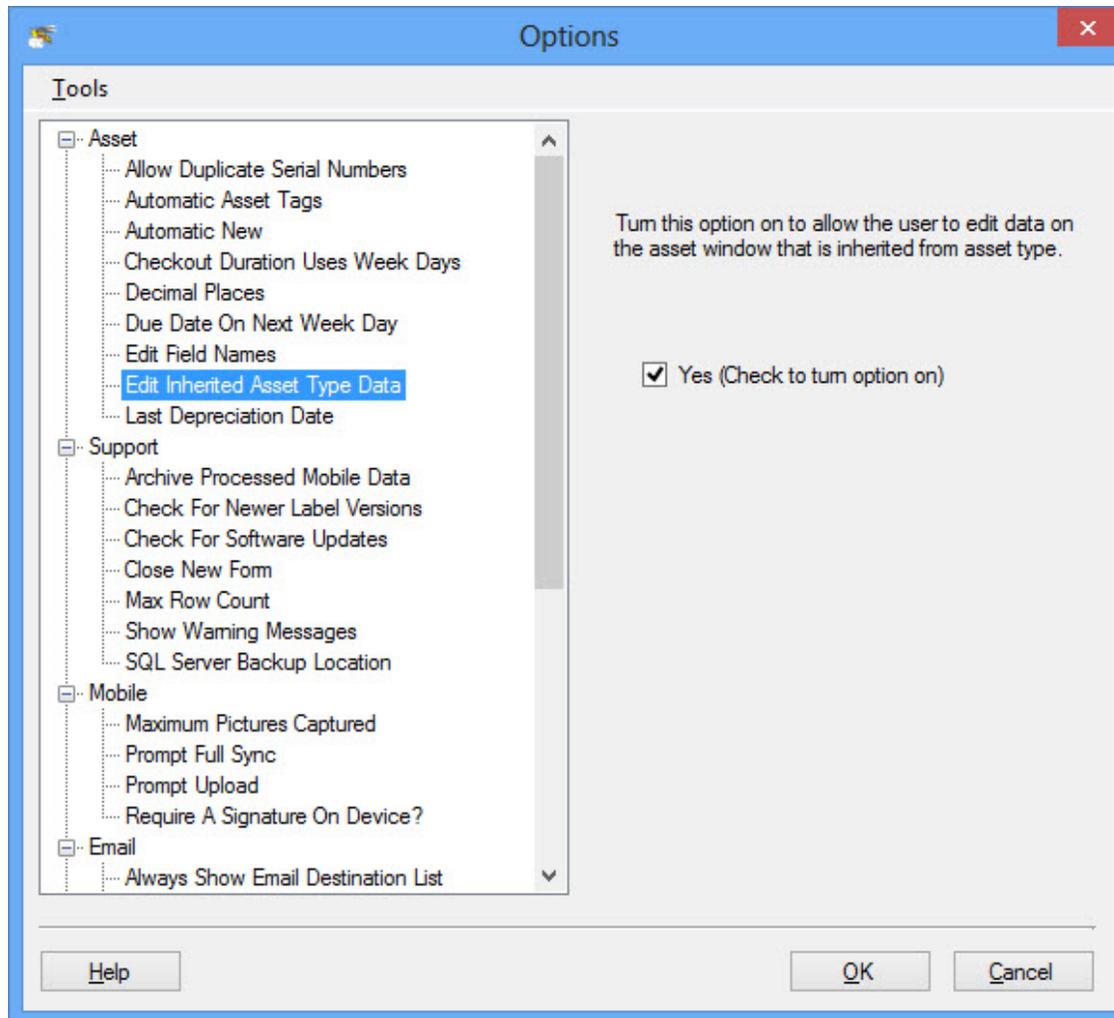
Edit Inherited Asset Type Data

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 disabled by default.

To Enable the Edit Inherited Asset Type Data Option

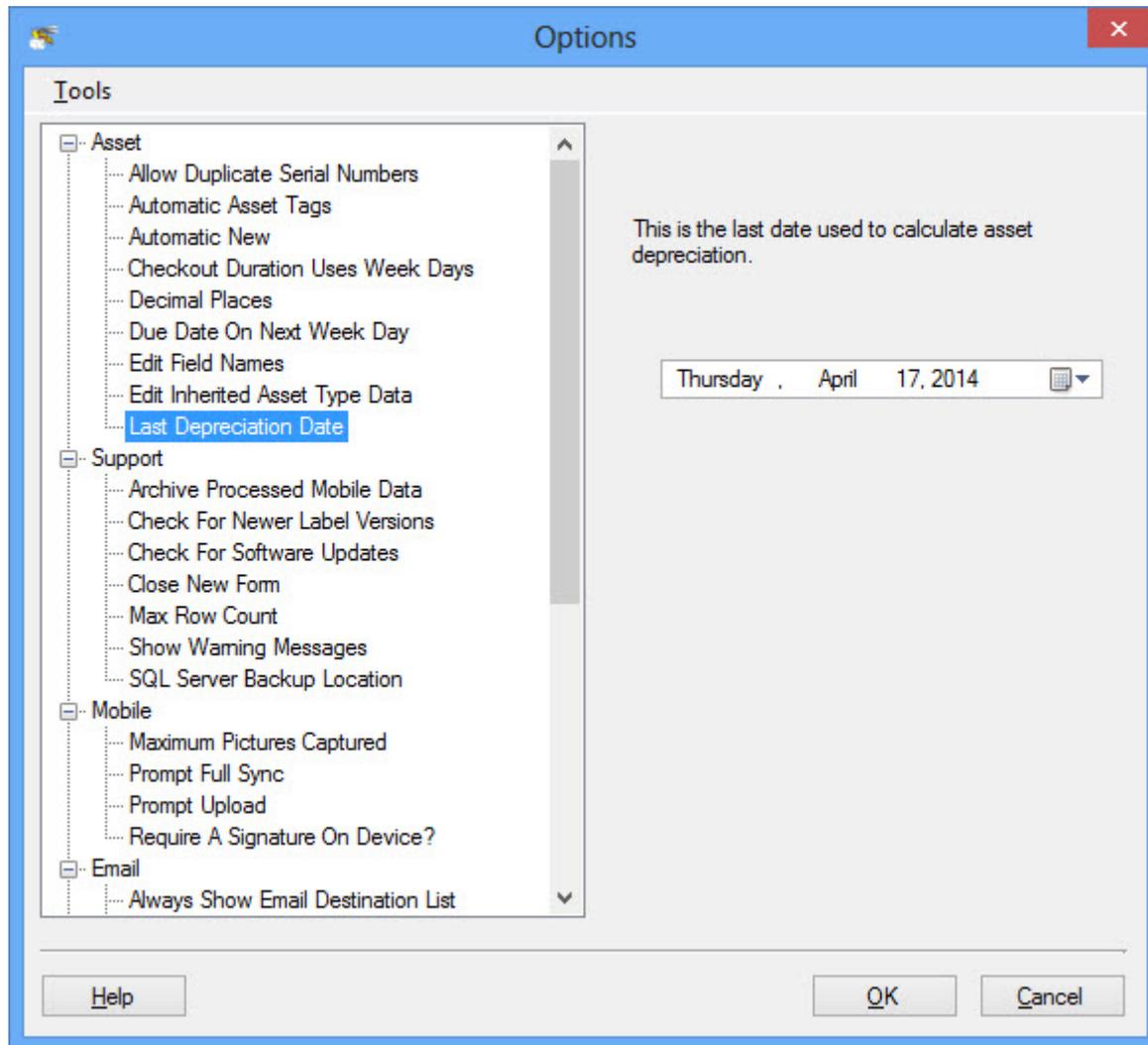
1. From the **Main** screen, select **Administration > Options**. The **Options** screen appears.
2. On the **Options** screen, highlight the **Edit Inherited Asset Type Data** option.
3. Make sure the **Yes** check box is selected.



4. Click the **OK** button when you are done making changes.

Changing the Last Depreciation Date

This view only field on the **Options** screen allows you to view the last date depreciation was calculated on your assets. **This field is view only.**



Support Options

Active Directory

Enterprise Edition Only

Set this option to **Yes** to allow MobileAsset to access your Active Directory for user log in information. This allows you to take advantage of Windows NT Authentication, meaning your users will be able to access MobileAsset automatically, without having to input login information each time. In addition, when you set up your Groups to match those in your Active Directory, MobileAsset will automatically create a user account the first time each user logs in.

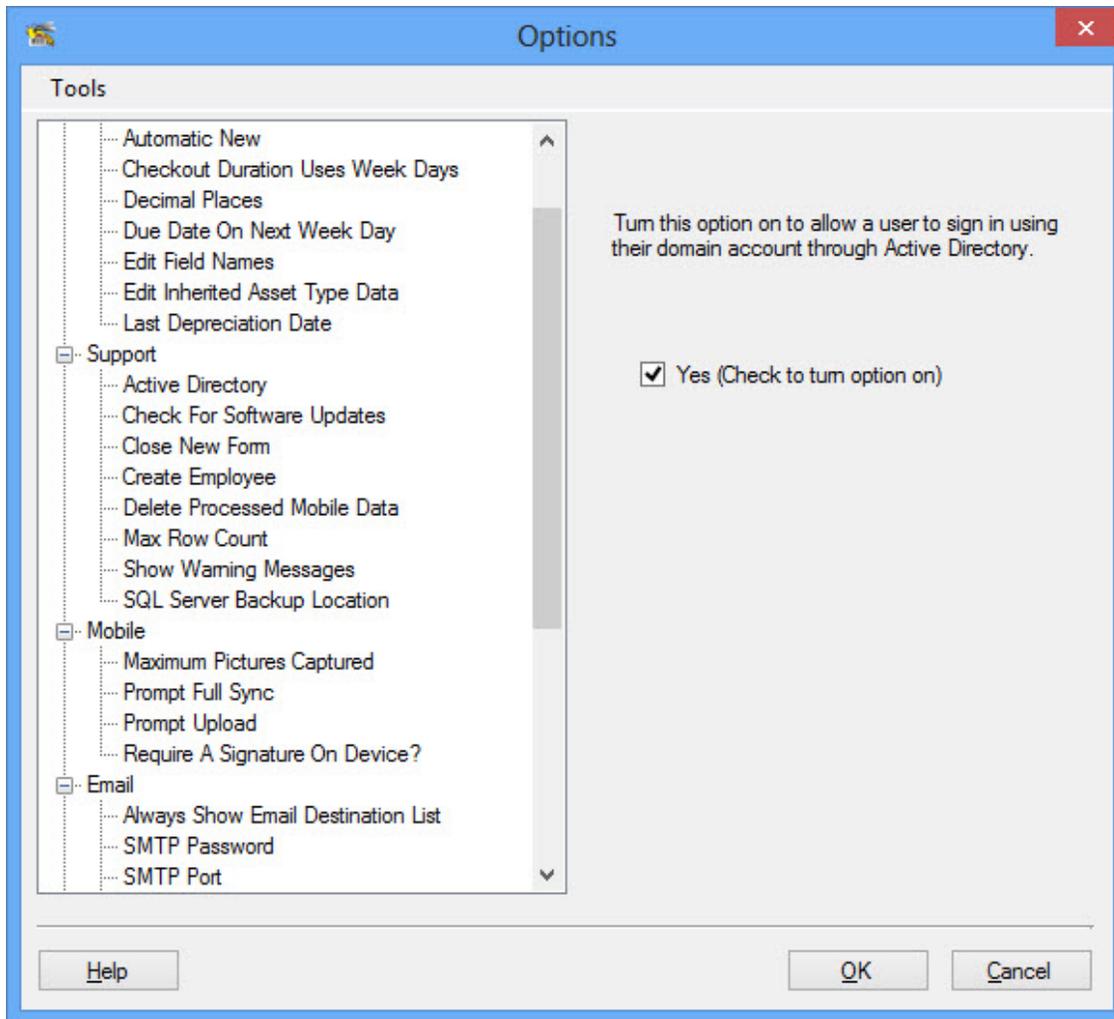
Example: You have a group in your Active Directory named My Users and you want everyone in My Users to have access to MobileAsset. Create a **Group** with the name My Users in MobileAsset using the MobileAsset PC application. Now when each member of the **Group** My Users accesses MobileAsset on the PC, MobileAsset will recognize the Active Directory Group name as matching the MobileAsset **Group** name and automatically create a **User** account for that user. After the group is setup, when the user accesses MobileAsset on the PC, MobileAsset will recognize the computer is on the network and automatically log in the user.

This option is turned **OFF** by default.

Note: This option can be used in conjunction with the [Create Employee](#) option.

1. From the **Main** screen, select **Administration > Options**.

2. On the **Options** screen, highlight the **Active Directory** option.



3. Leave this option set to **Yes** to allow users to sign in using their network domain account.

Check for Software Updates

By default, the software will check for updates to the application and notify you if a more recent version is available. You can then access the software updates website and download the latest version. This ensures you are always working with the most up-to-date version available to you. This feature is turned on by default.

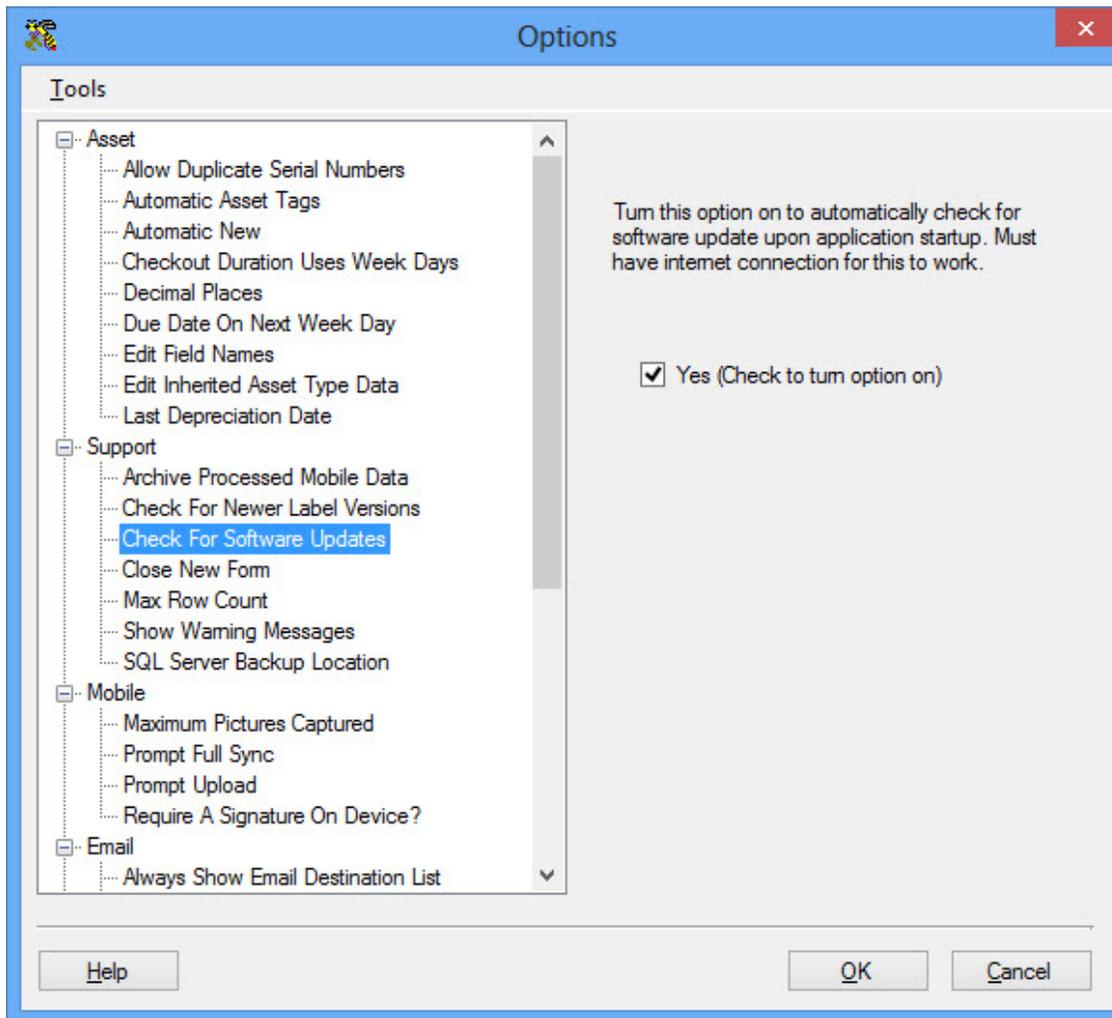
The software must be installed on a machine with Internet access to check for updates.

You can turn off the automatic check and perform periodic manual checks, or leave the option on and perform a manual check, if desired.

[To Disable the Automatic Version Check Feature To Perform a Manual Check](#)

To Disable the Automatic Version Check Feature

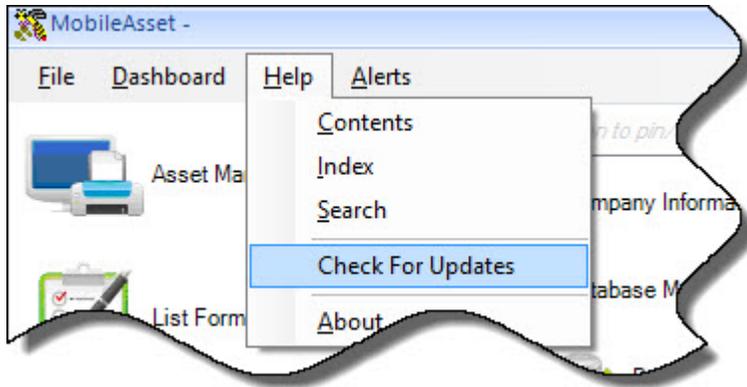
1. From the **Main** screen, select **Administration > Options**. The **Options** screen appears.
2. Highlight the **Automatic Check for Updates** option and deselect the **Yes** check box.



3. Click **OK** to save your changes and to **Close the Options** screen. The option is now disabled. You can manually check for updates as needed.

To Perform a Manual Check

From the **Main** screen, click **Help > Check for Updates**.



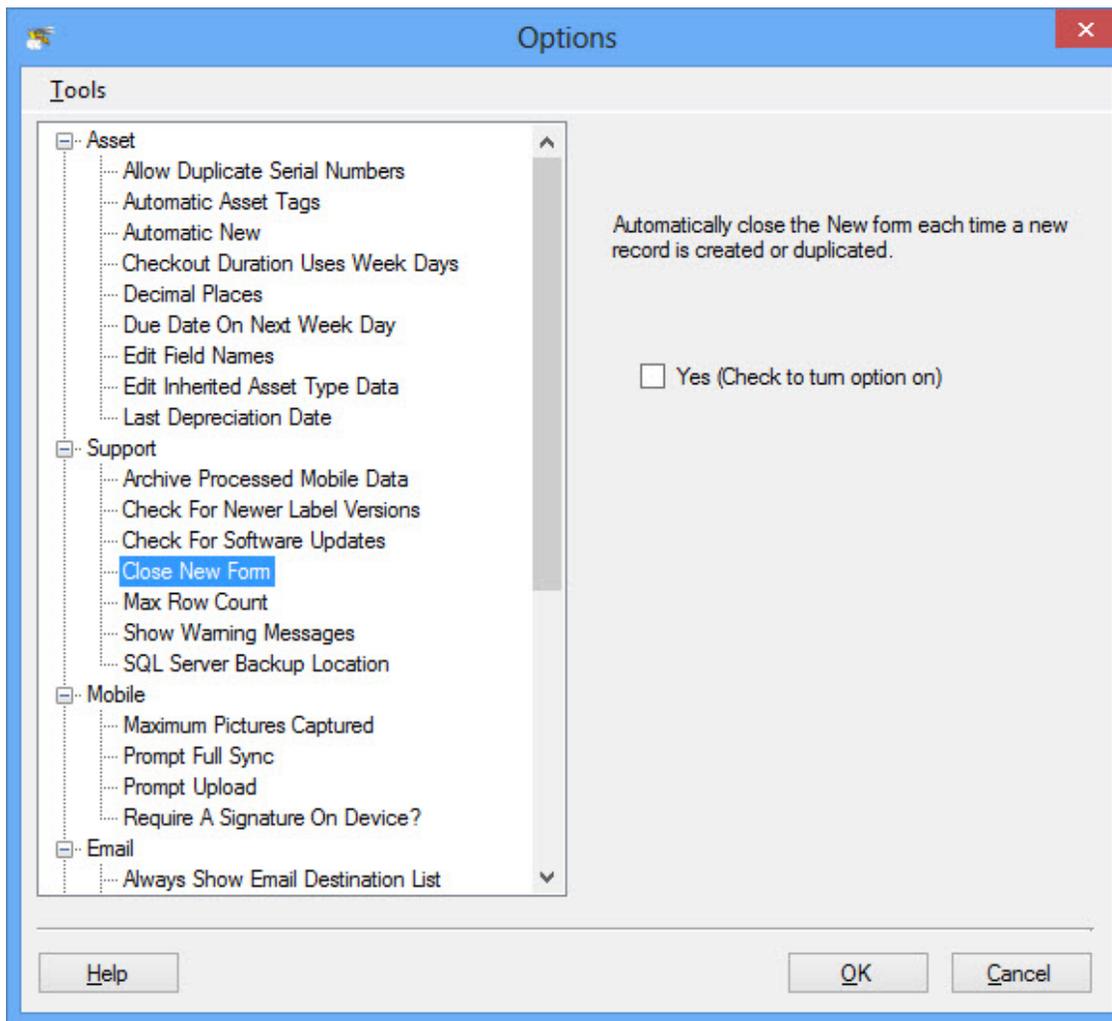
The system will automatically check for a newer version and notify you if one is available. This procedure can be performed at any time.

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 off (disabled), 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 on (enabled), 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 OFF by default.

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



It might be desirable to turn this option off when first entering data, for speed, then turn it on later to avoid confusion when using it infrequently.

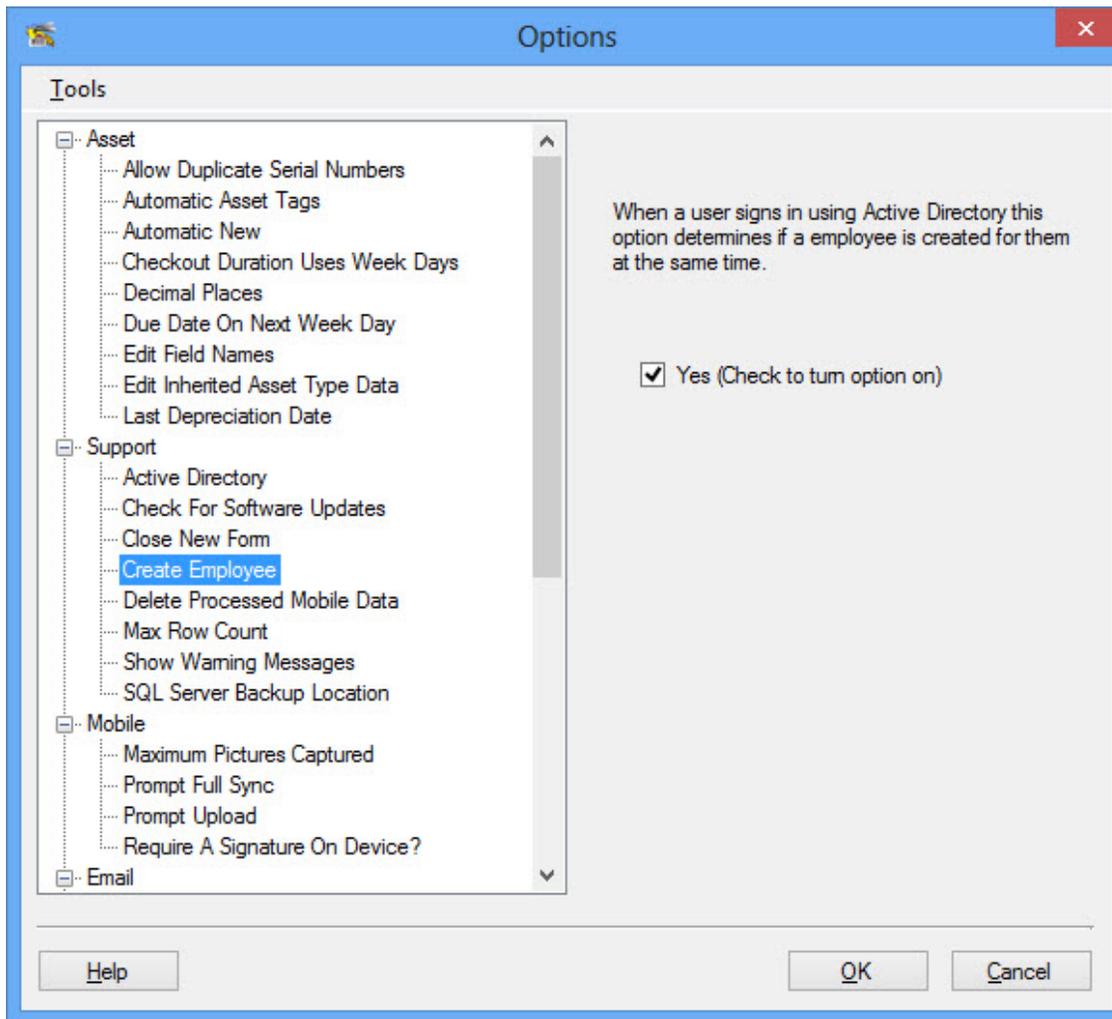
Create Employee

Enterprise Edition Only

If you have the **Active Directory** option set to **Yes**, meaning you are using **Windows NT Authentication**, you can turn this option **ON** to allow MobileAsset to automatically create an employee record the first time he/she logs in using Active Directory.

This option is ON by default.

1. From the **Main** screen, select **Administration > Options**.
2. On the **Options** screen, highlight the **Create Employee** option.



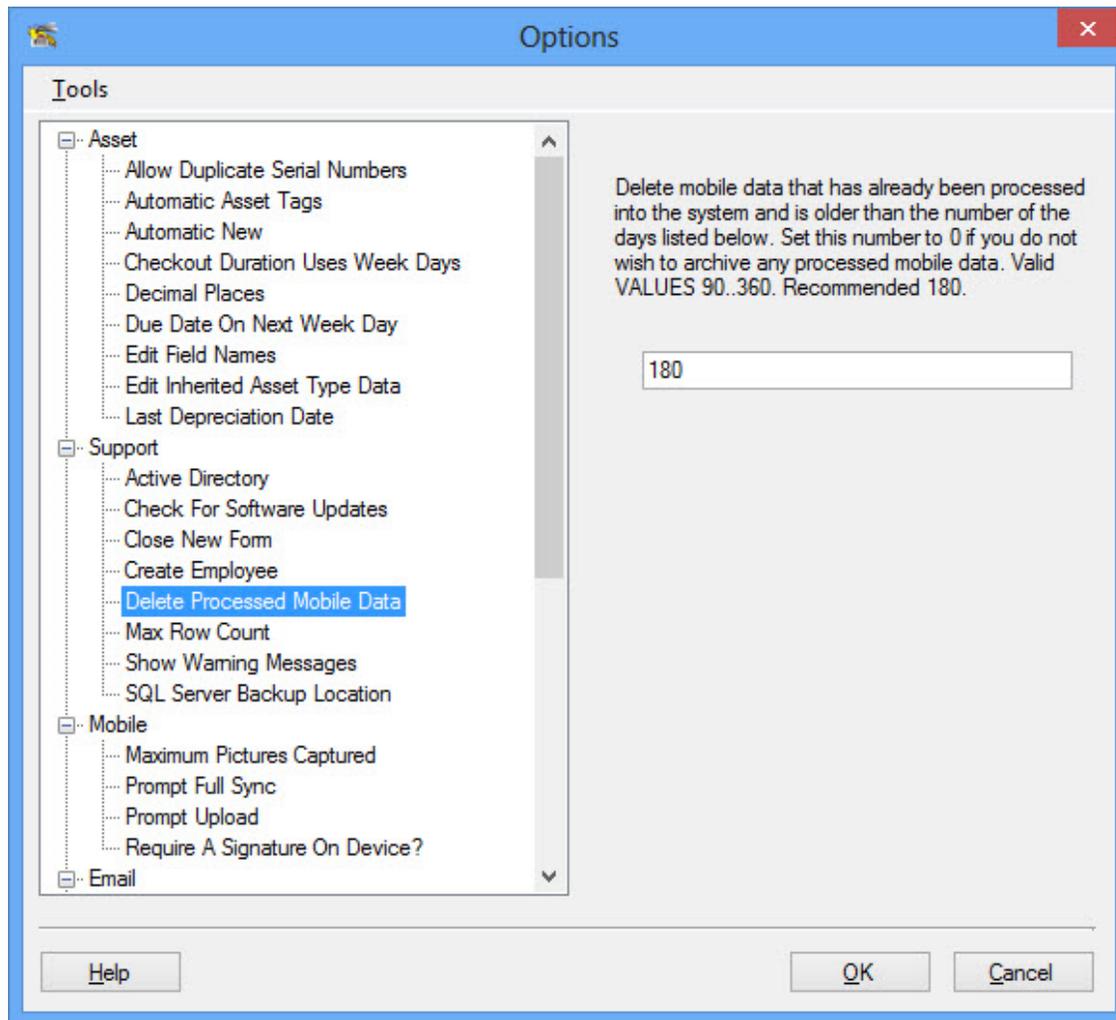
3. If you want MobileAsset to automatically create an employee record the first time the user logs in using Active Directory, make sure the **Yes** checkbox is selected. If you do not want the employee record automatically created, deselect the checkbox.

Delete Processed Mobile Data

The **Delete Processed Mobile Data** option allows you to set MobileAsset to automatically delete mobile data that was processed into the system more than X number of days ago. This keeps your database free from unneeded information. The default setting is data older than 180 days.

To Delete Processed Mobile Data:

1. From the **Main** screen click **Administration > Options**. The **Options** screen appears.
2. On the **Options** screen, highlight the **Delete Processed Mobile Data** option:



3. In the text entry field, enter the number of days after which processed mobile data should be deleted. In the example above, we have entered 180 (the default setting). This means that processed mobile data older than 180 days will be deleted.

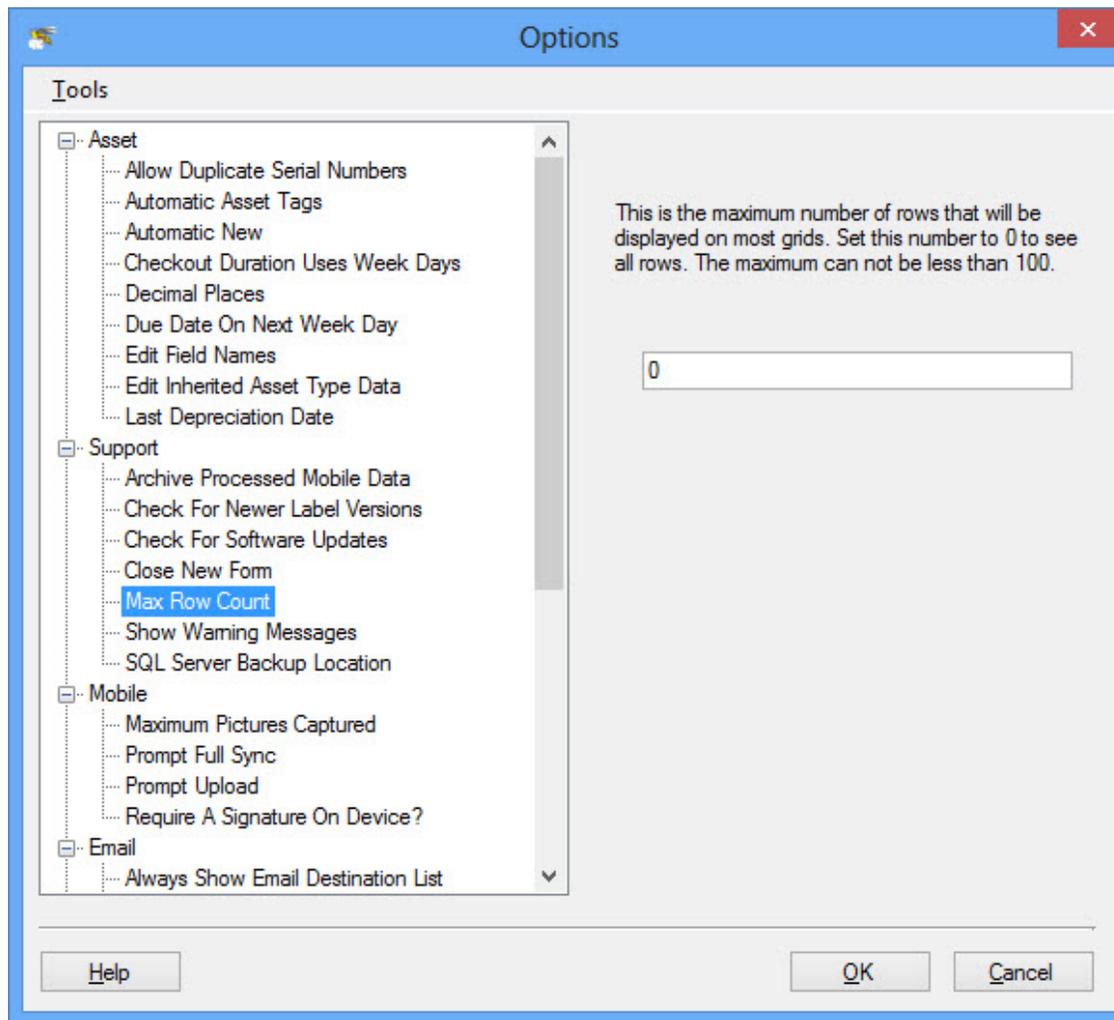
If you do not want to delete processed mobile data, enter 0 in this field.

4. Click **OK** when you are done making changes.

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 than to display 1,000. Therefore, you may want to set the maximum to display 1,000.

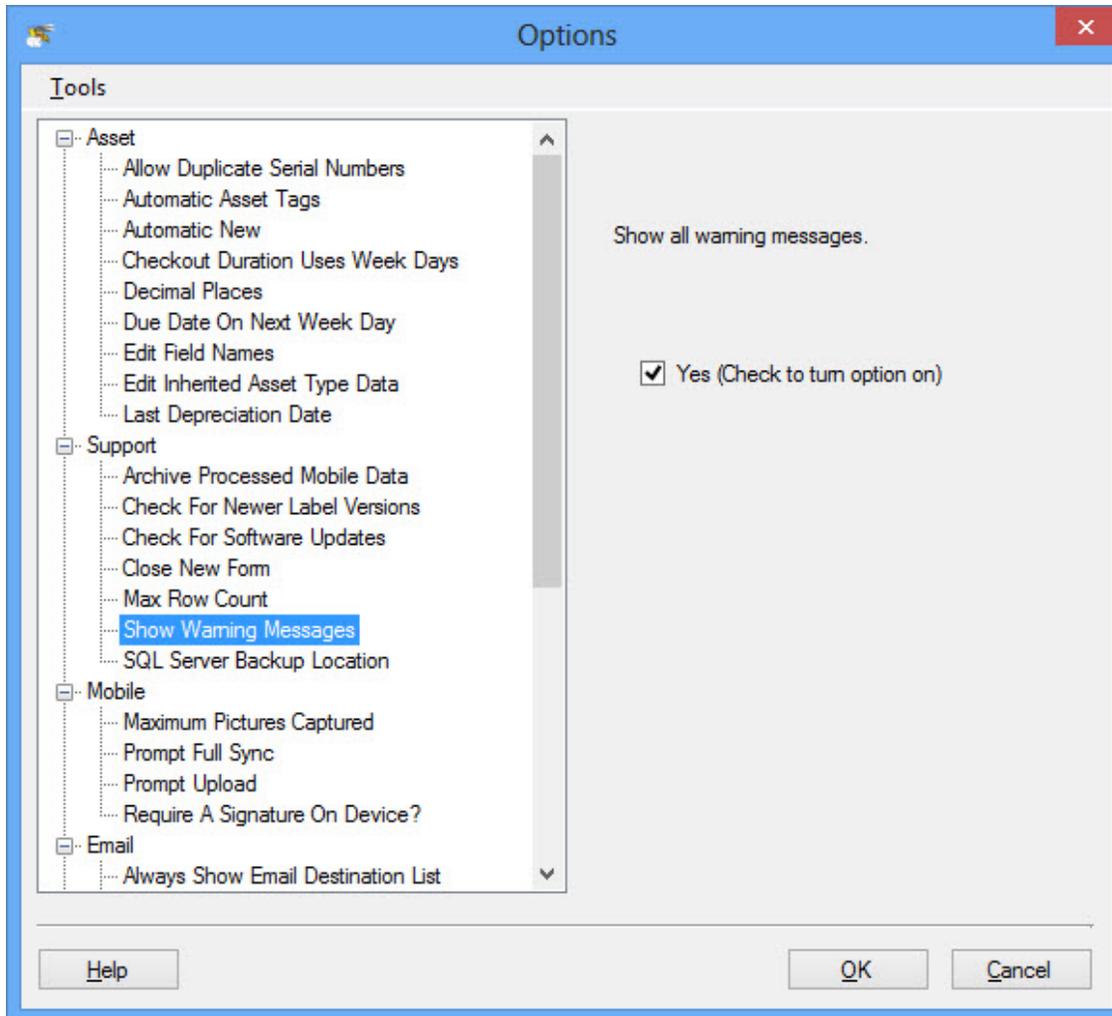
1. To change the default number of rows that display, from the Main screen, select **Administration > Options**. The **Options** screen appears.
2. On the **Options** screen, select **Max Row Count**. The default number is 0, which displays all rows. You can change this to any number between 100 and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



Show Warning Messages

The software allows you to turn off the warning messages that normally appear. For example, if you try to close a screen with unsaved information, by default a warning message will appear alerting you to that fact. If you do not wish to see these types of messages, you can turn them off using this function.

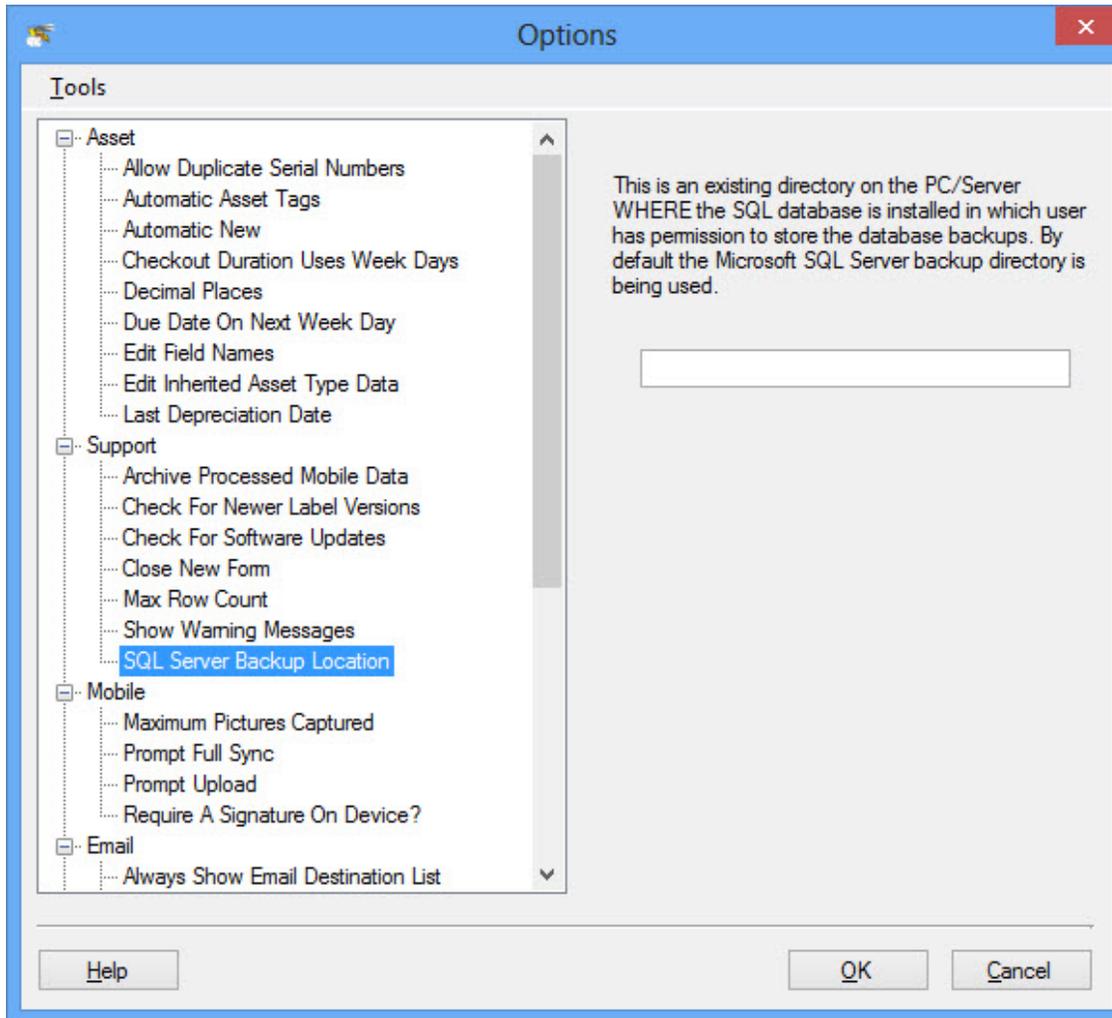
1. To turn off the **Show Warning Messages** option, from the **Main** screen click **Administration > Options**. The **Options** screen appears.
2. On the **Options** screen, highlight **Show Warning Messages** and deselect the **Yes** checkbox (it is selected by default). Deselecting the **Yes** checkbox turns off the warning messages.



SQL Server Backup Location

This option is useful if you have your database installed on a different PC/Server than where you are running the software.

1. Select **Administration > Options > SQL Server Backup Location**.



2. Enter an existing directory on the PC/Server where the SQL database is installed (this is where you installed the database during the initial installation process). Make sure the user who will be performing the backups (Administration Menu > Backup) has permission to the database.

If a location is not entered, the Microsoft SQL Server backup directory will be used to store backups. This is where the system will look for backup files when you try to restore the database as well.

If you specify a folder and SQL Server does not have rights to write to that folder, you will receive an error message and the backup will fail. It is your responsibility to give SQL Server the proper rights to write the backup in the specified folder.

For information on how to give permissions to a folder, please refer to Wasp Technical Support, Knowledge Base and Downloads on the internet.

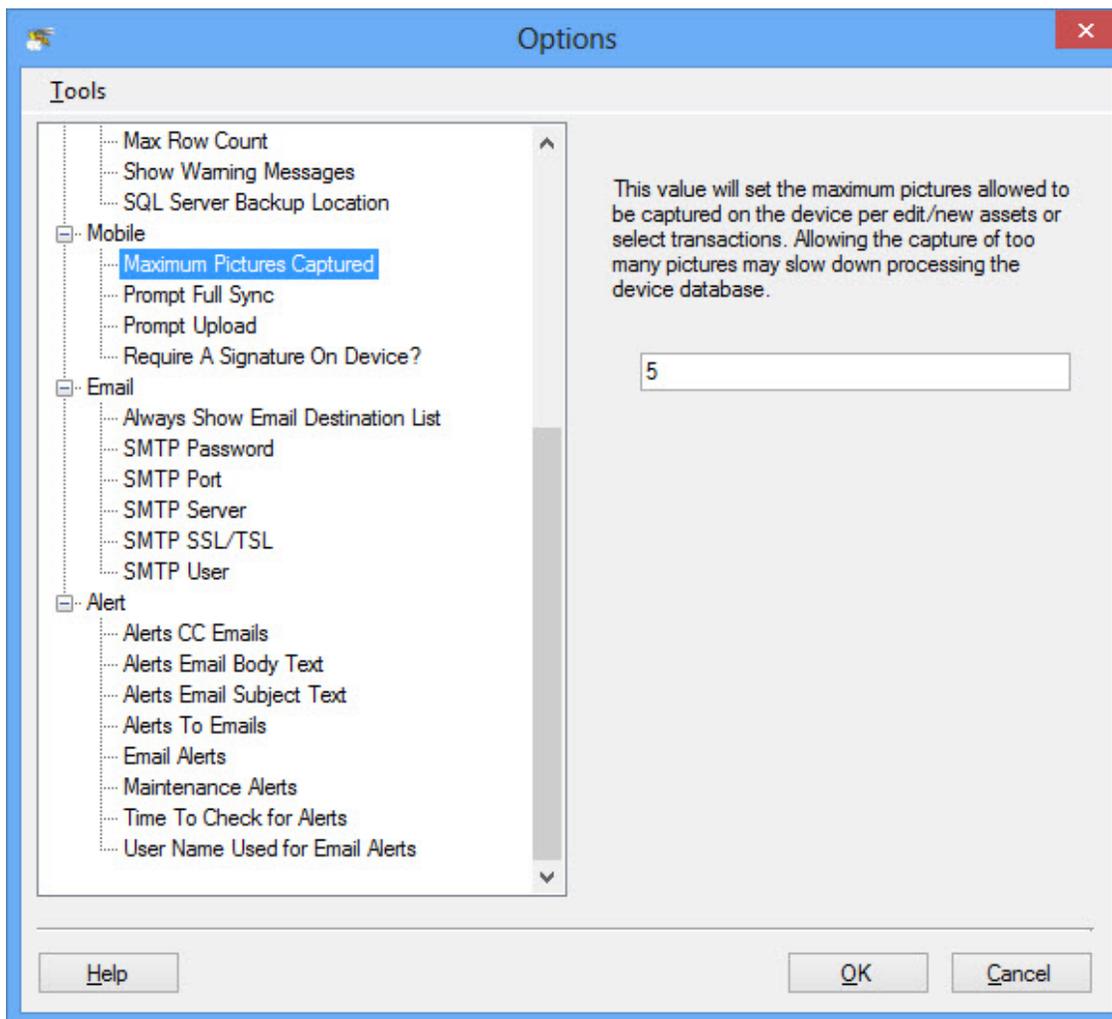
By default, if you do not have a remote connection to your database, the backup folder is: C:\Program Files\Microsoft SQL Server\MSSQL.1\MSSQL\Backup

Mobile

Maximum Pictures Captured

This option sets the maximum number of pictures that can be captured on a mobile device per each edit/new asset or for select transactions. Keep in mind that allowing too many pictures may slow down processing the device database.

1. To set the maximum allowed captures, from the **Main** screen click **Administration>Options**.
2. On the **Options** screen, select **Mobile > Maximum Pictures Captured**.
3. Enter the number of captures you want to allow on the devices in the data field. The default amount is 5.

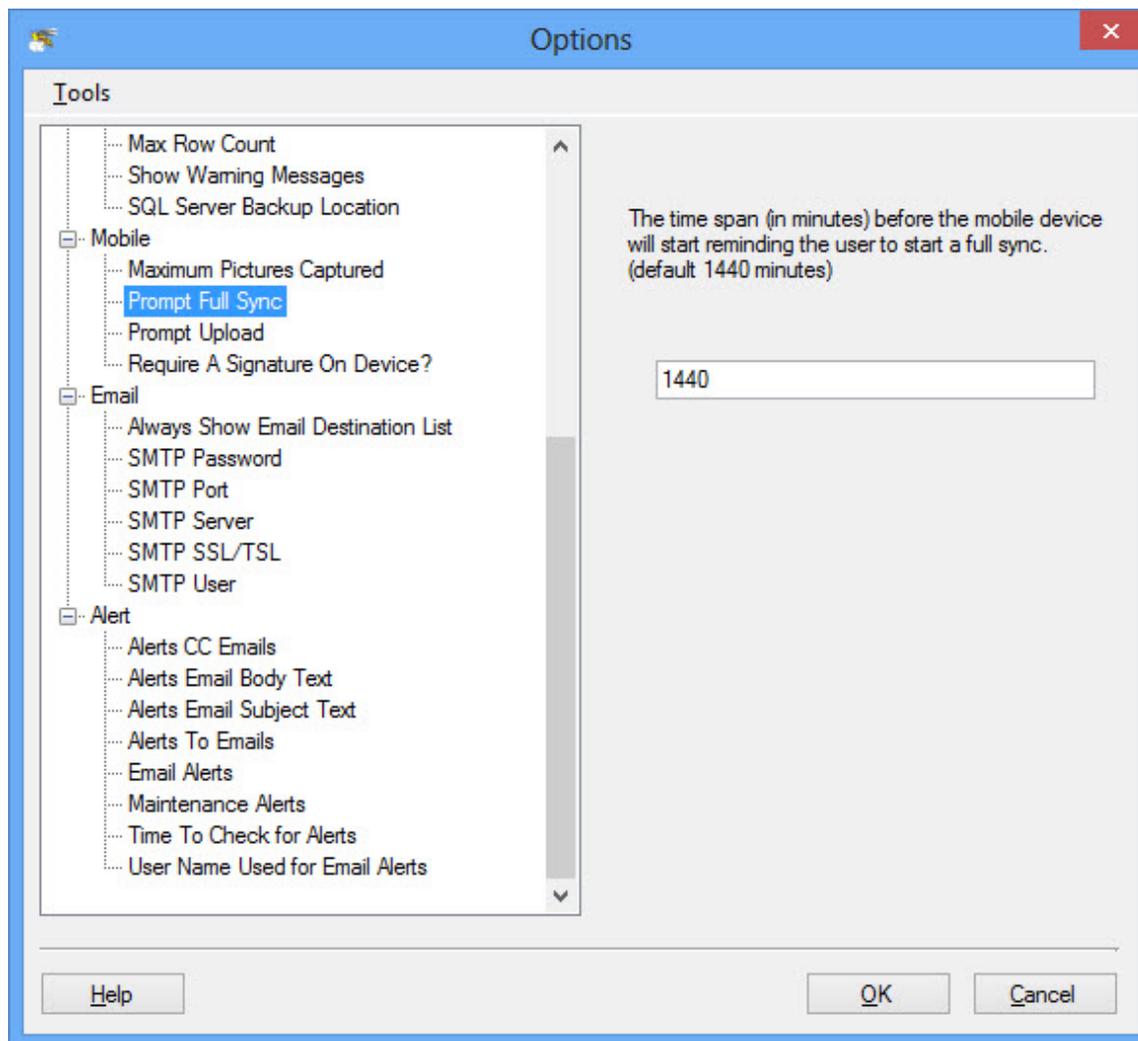


4. Click **OK** when you are done entering data.

Prompt Full Sync

This option sets the time span in minutes before the mobile device will begin prompting the user to start a full sync back to the PC.

1. To set this option, from the **Main** screen click **Administration > Options**.
2. On the **Options** screen, select **Mobile > Prompt Full Sync**.
3. Enter the number of minutes you want to elapse from the beginning of the MobileAsset session before the device begins reminding the user to start a full sync in the data field. The default number of minutes is 1440.

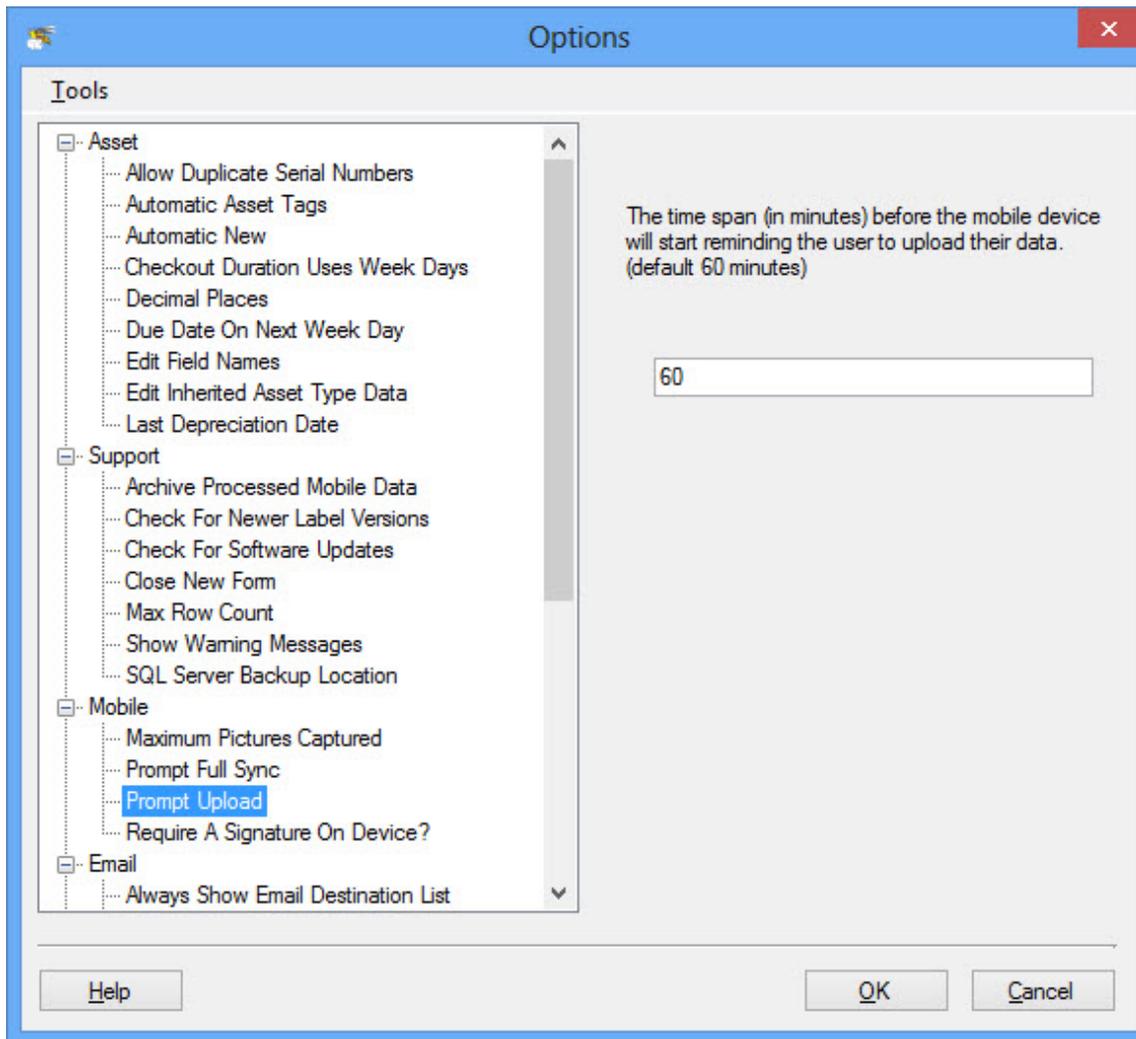


4. Click **OK** when you are done entering data.

Prompt Upload

This option allows you to set the time span in minutes before the mobile device will begin prompting the user to upload their data.

1. To set this option, from the **Main** screen click **Administration>Options**.
2. On the **Options** screen, select **Mobile > Prompt Upload**.
3. Enter the number of minutes you want to elapse before the device begins reminding the user to upload data. The default time is 60 minutes.

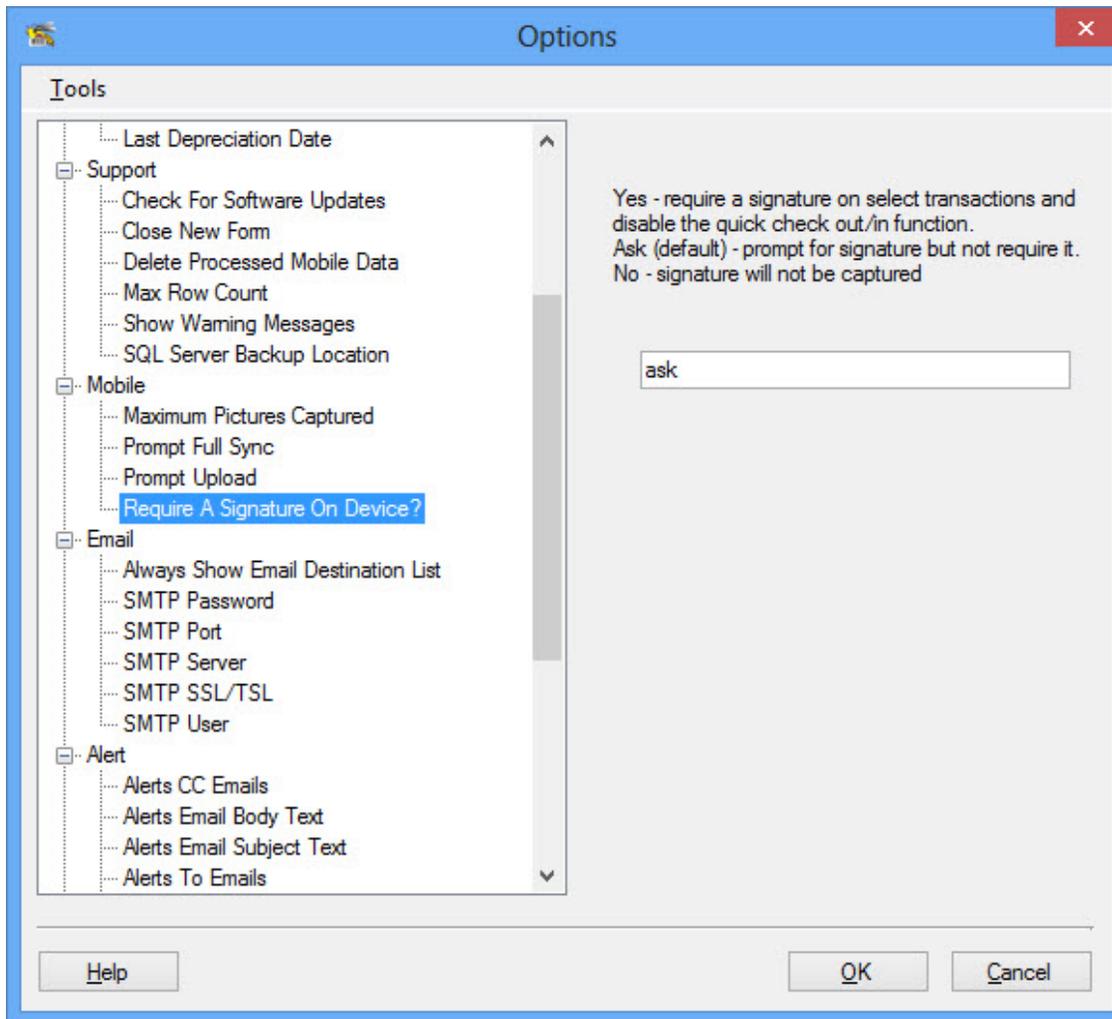


4. Click **OK** when you are done entering data.

Require a Signature on Device?

This option allows you to designate whether signatures will be required on select transactions (such as check out and check in) on the mobile devices.

1. To set this option, from the **Main** screen click **Administration > Options**.
2. On the **Options** screen, select **Mobile > Require a Signature on Device**.



3. You have three options:

Type "yes" in the text field to require a signature on select transactions. Selecting **Yes** disables the [Quick Check Out](#) and [Quick Check In](#) functions on the mobile device.

Type "ask" in the text field to have the device prompt for a signature, though a signature will not be required. (This is the default option.)

Type "no" in the text field to disable the signature feature on the device. This means a signature will not be captured on the device.

Note: Case does not matter. For example, you can enter no, NO, or No.

4. Click **OK** when you are done entering data.

Email Options

Mobile Asset can send out alerts as emails to selected recipients by setting the options in the **Email** and **Alerts** sections of the **Options** screen.

Email Options are:

[Always Show Email Destination List](#)

[SMTP Password](#)

[SMTP Port](#)

[SMTP Server](#)

[SMTP SSL/TSL](#)

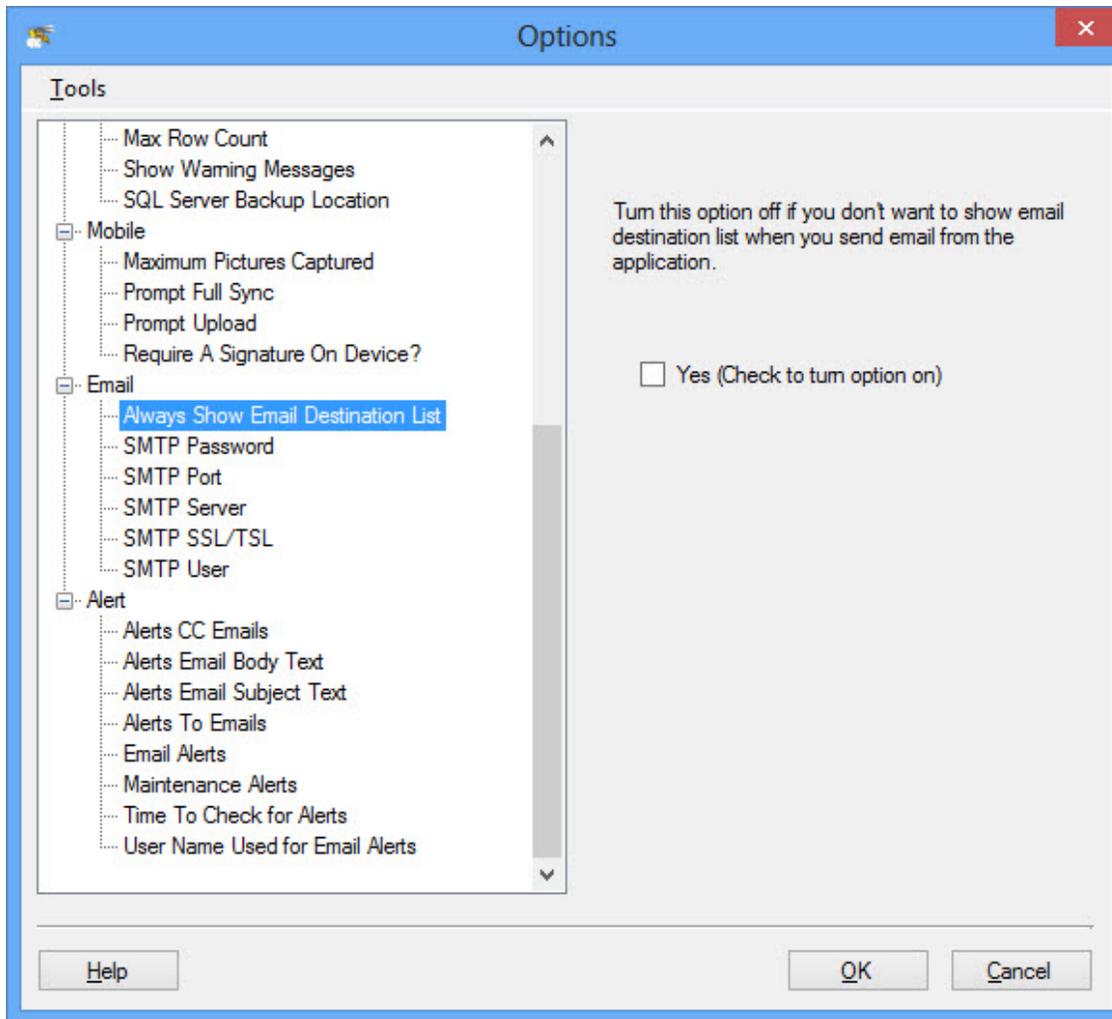
[SMTP User](#)

Always Show Email Destination List

This option sets the email destination list to display prior to alerts (maintenance, overdue ,etc.) alerts being emailed out by the software.

1. To set this option, from the **Main** screen click **Administration>Options**.

2. On the **Options** screen, select **Email > Always Show Email Destination List**.



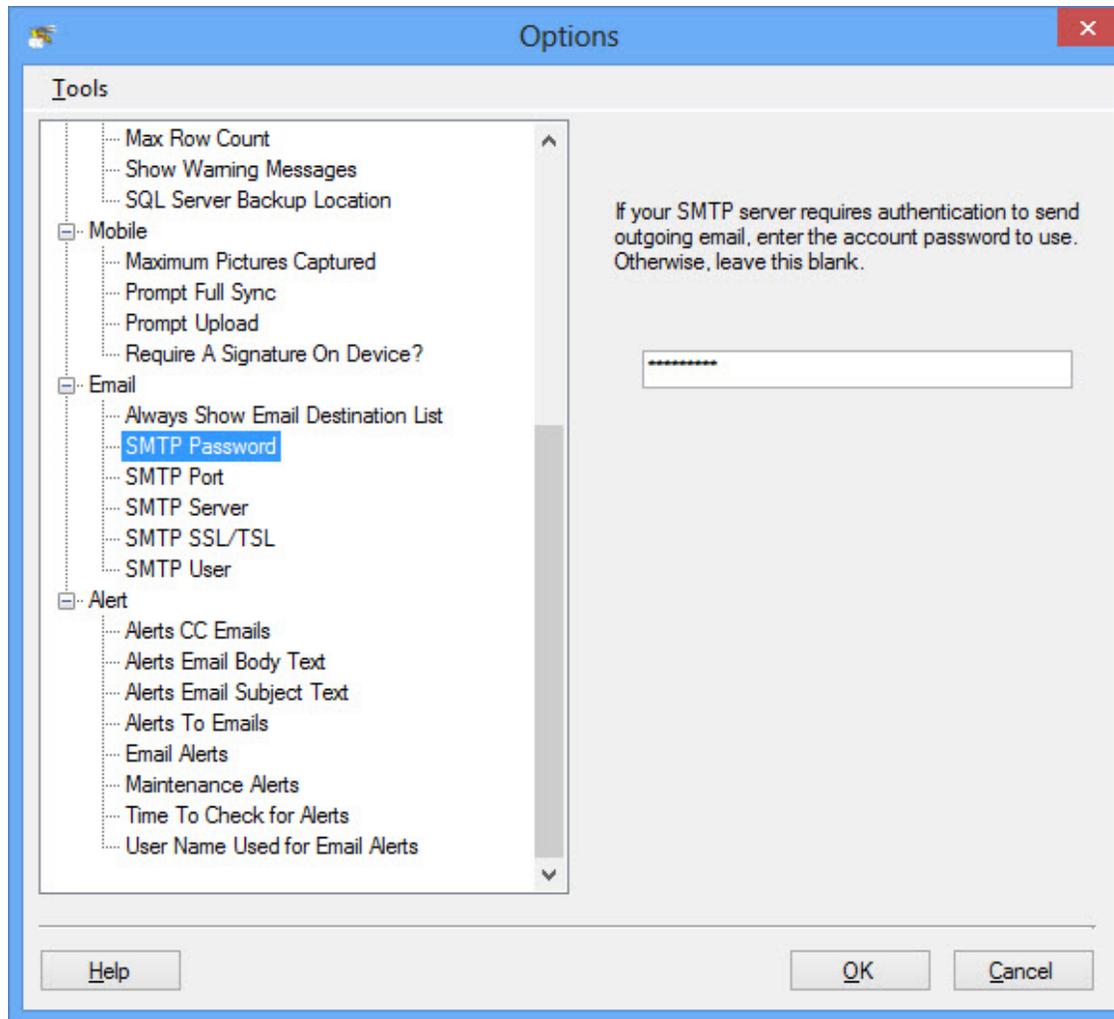
3. Select **Yes** to always have the list of email destinations appear prior to the software sending out alerts emails. This list allows you to select the email addresses to which the order will be sent.
4. If you deselect the **Yes** checkbox, the list will not appear and the emails will automatically be sent to every address you entered in the **Alerts to Emails** option.

SMTP Password

If your SMTP server requires authentication to send outgoing mail, enter the password here.

1. To set this option, from the **Main** screen click **Administration>Options**.

2. On the **Options** screen, select **Email > SMTP Password**



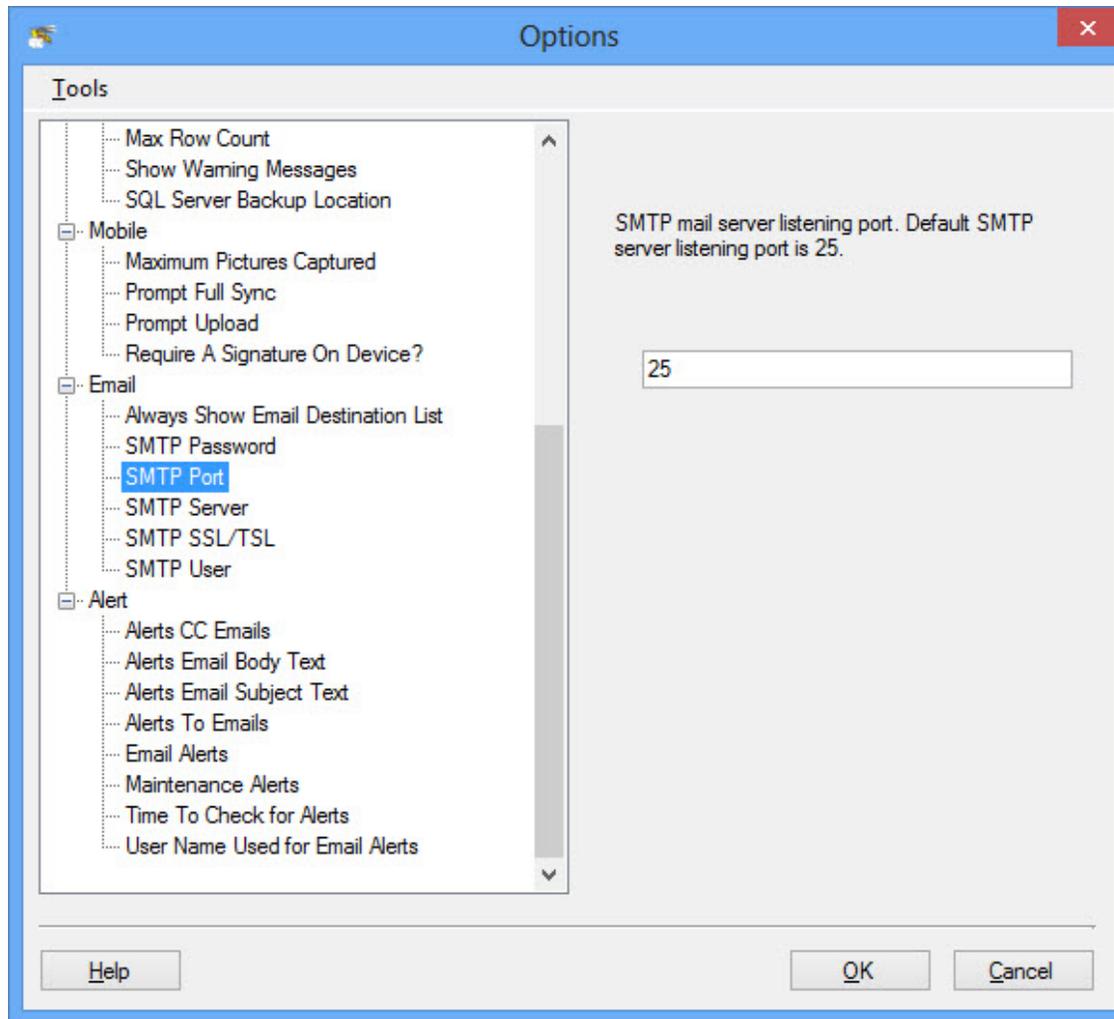
3. If your SMTP server requires authentication enter the password. The password will appear masked, as shown in the example above. If it does not require authentication, leave this field blank.

SMTP Port

Enter the SMTP mail server listening port here.

1. To set this option, from the **Main** screen click **Administration>Options**.

2. On the **Options** screen, select **Email > SMTP Port**.



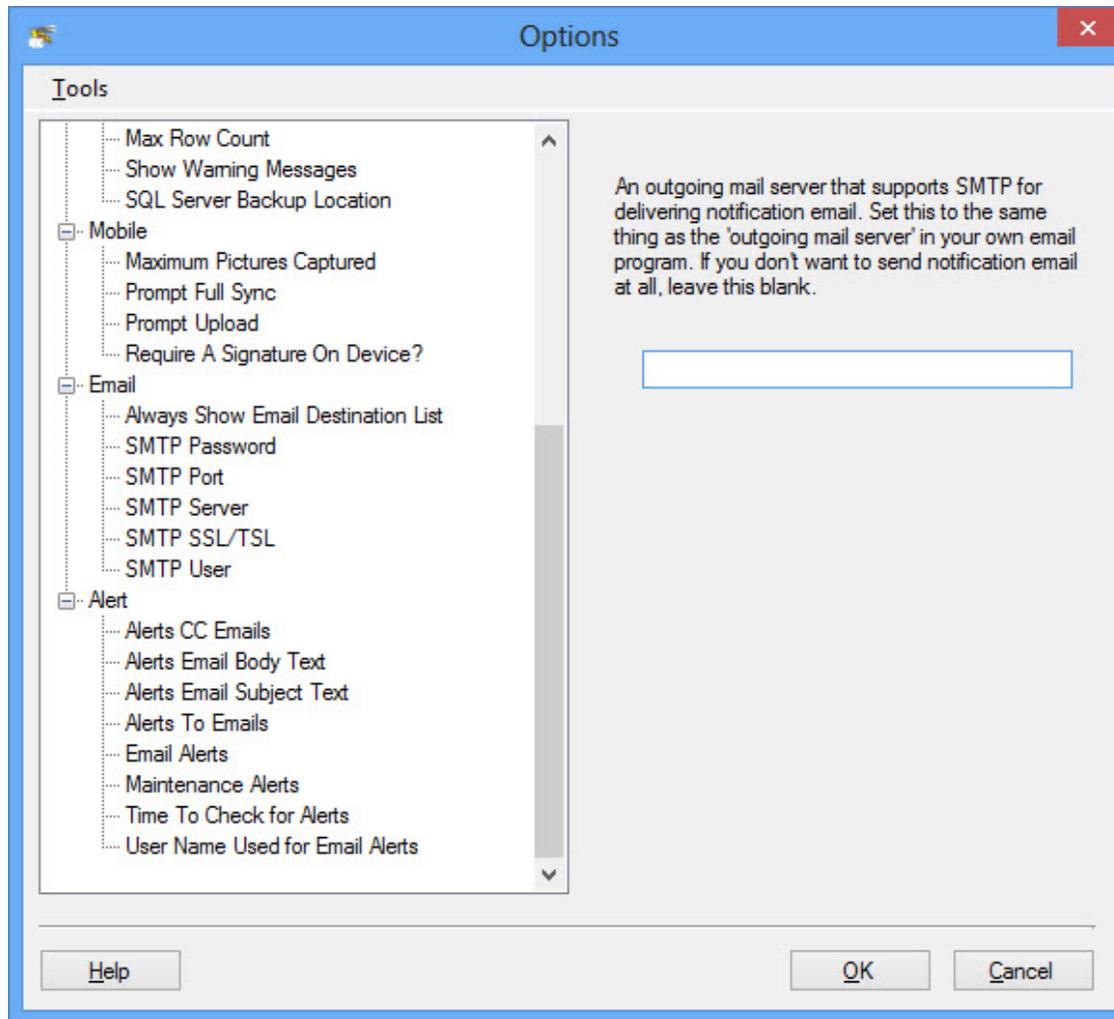
3. Enter the port number in the data field. The default port is 25.

SMTP Server

Enter the name of an outgoing mail server that supports SMTP for delivering notification emails.

1. To set this option, from the **Main** screen click **Administration>Options**.

- On the **Options** screen, select **Email > SMTP Server**.



- 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 alert emails, leave this field blank.

SMTP SSL/TSL

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

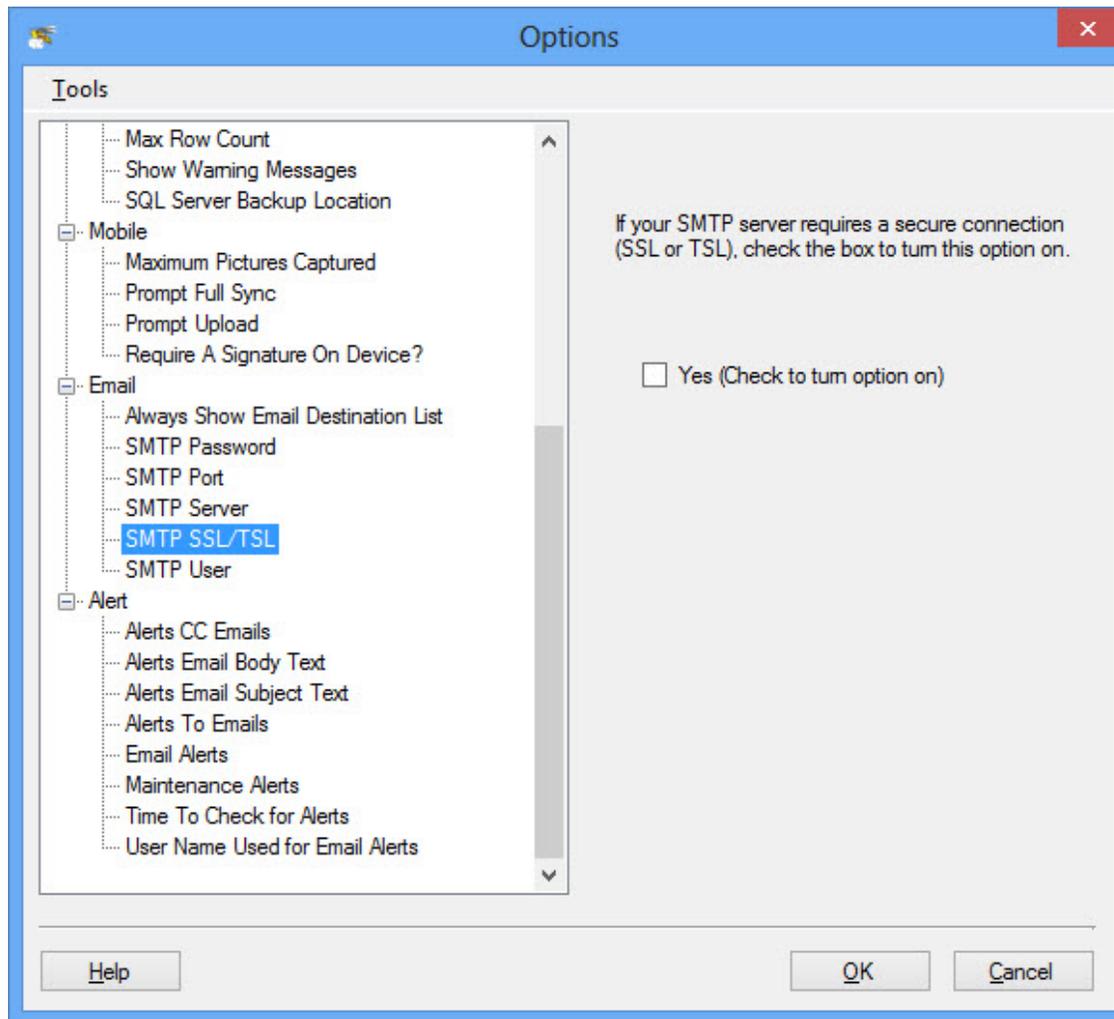
Note on using Gmail: To use a Gmail SMTP server to send out mail from MobileAsset:

- Go to www.gmail.com and setup your gmail account.
- Have your IT department open port 587 and 465 on your computer.
- 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.

1. To set this option, from the **Main** screen click **Administration>Options**.
2. On the **Options** screen, select **Email > SMTP SSL/TSL**.



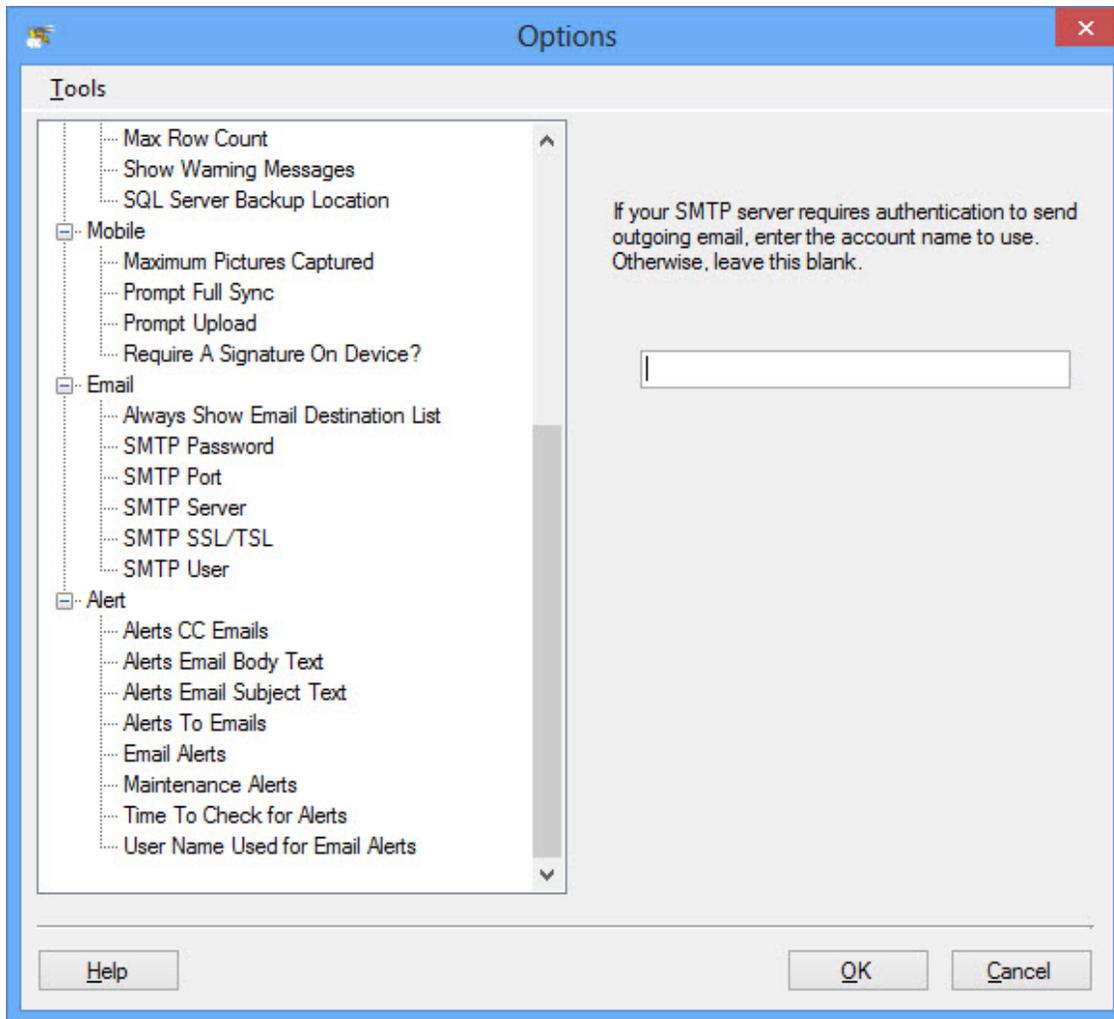
3. Turn this option on for all SMTP servers that require SSL or TSL, including GMail SMTP servers.

SMTP User

If your SMTP server requires authentication to send outgoing mail, enter the user name here.

1. To set this option, from the **Main** screen click **Administration>Options**.

2. On the **Options** screen, select **Email > SMTP User**.



3. 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.

Alert Options

Alert Options are a series of settings related to the Alerts functionality. This section contains options for entering email address to which alerts should be sent, the body and subject line of the alerts email and the lead time for maintenance alerts.

Alerts are not available in the Standard version.

Alert Options are:

[Alerts CC Emails](#)

[Alerts Email Body Text](#)

[Alerts Email Subject Text](#)

[Alerts to Emails](#)

[Email Alerts](#)

[Maintenance Alerts](#)

[Time to Check for Alerts](#)

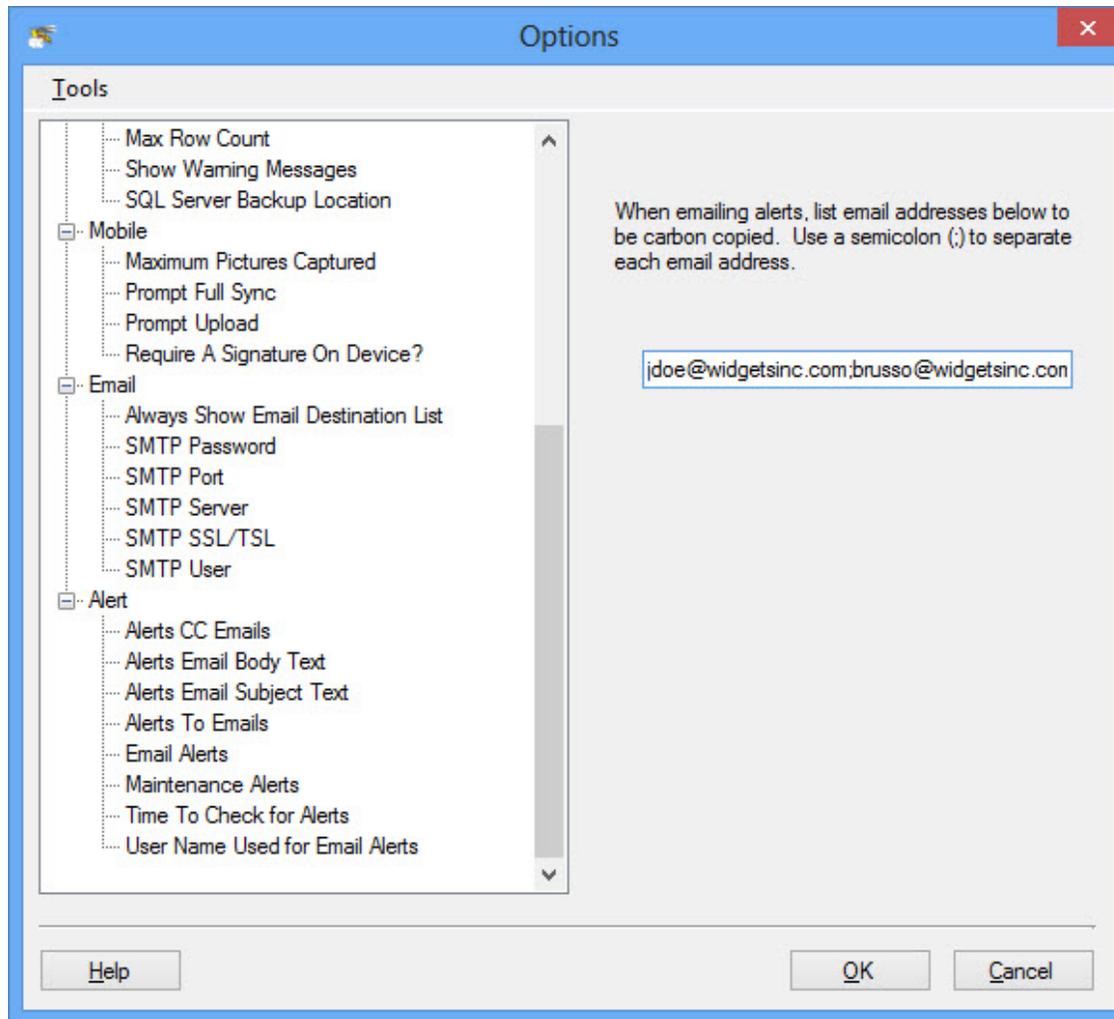
[User Name Used for Email Alerts](#)

Alerts CC Emails

You can enter email address here to which the alert will automatically be sent at the time designated in the [Time to Check for Alerts](#) option. The CC email addresses are in addition to any email addresses entered in the [Alerts To Emails](#) option.

1. To set this option, from the **Main** screen click **Administration > Options**.

2. On the **Options** screen, select **Alert > Alerts CC Emails**.



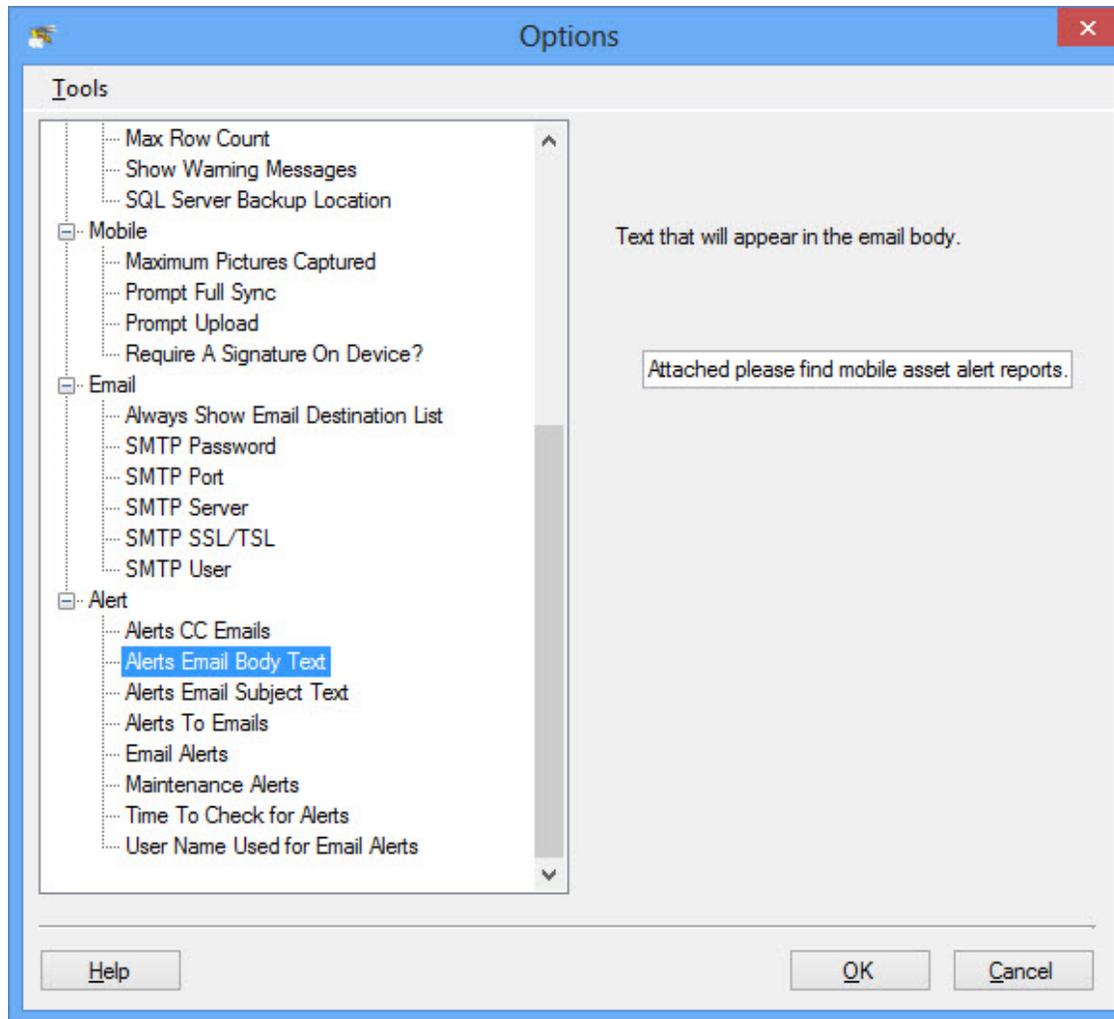
3. Enter the list of email addresses you want CC'd on the alerts email in the text field. Use a semicolon (;) to separate each email address as shown in the example above.

Alerts Email Body Text

Enter the text you want to appear in the body of the email using this option.

1. To set this option, from the **Main** screen click **Administration > Options**.

2. On the **Options** screen, select **Alert > Alerts Email Body Text**.



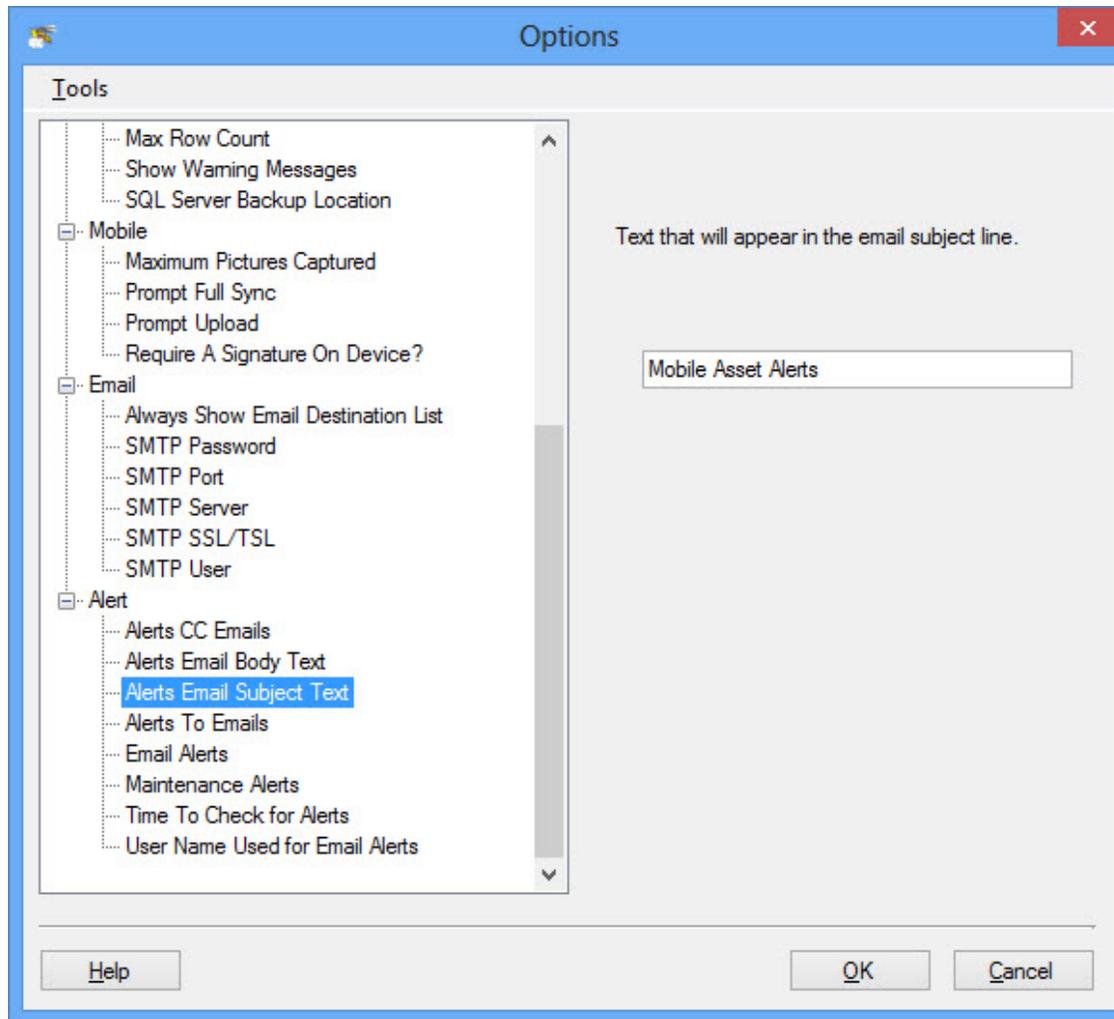
3. Enter the text you want to appear in the body of the alert email. The default text is "Attached please find mobile asset alert reports.".

Alerts Email Subject Text

Enter the subject line for the alert email.

1. To set this option, from the **Main** screen click **Administration > Options**.

2. On the **Options** screen, select **Alert > Alerts Email Subject Text**.



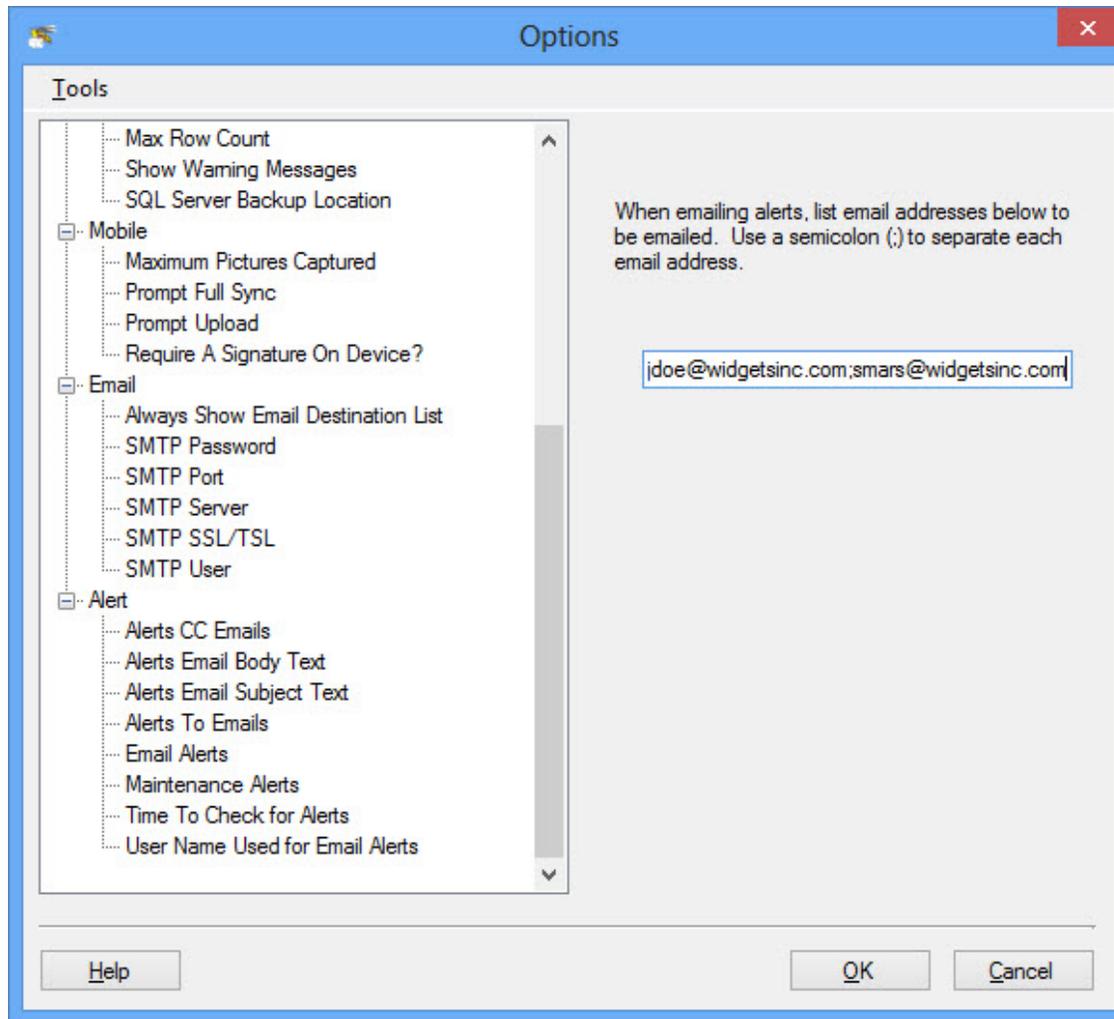
3. Enter the subject line you want to appear on the alert email. The default subject line is "Mobile Asset Alerts".

Alerts To Emails

You can enter email address here to which the alert will automatically be sent at the time designated in the [Time to Check for Alerts](#) option.

1. To set this option, from the **Main** screen click **Administration > Options**.

2. On the **Options** screen, select **Alert > Alerts To Emails**.



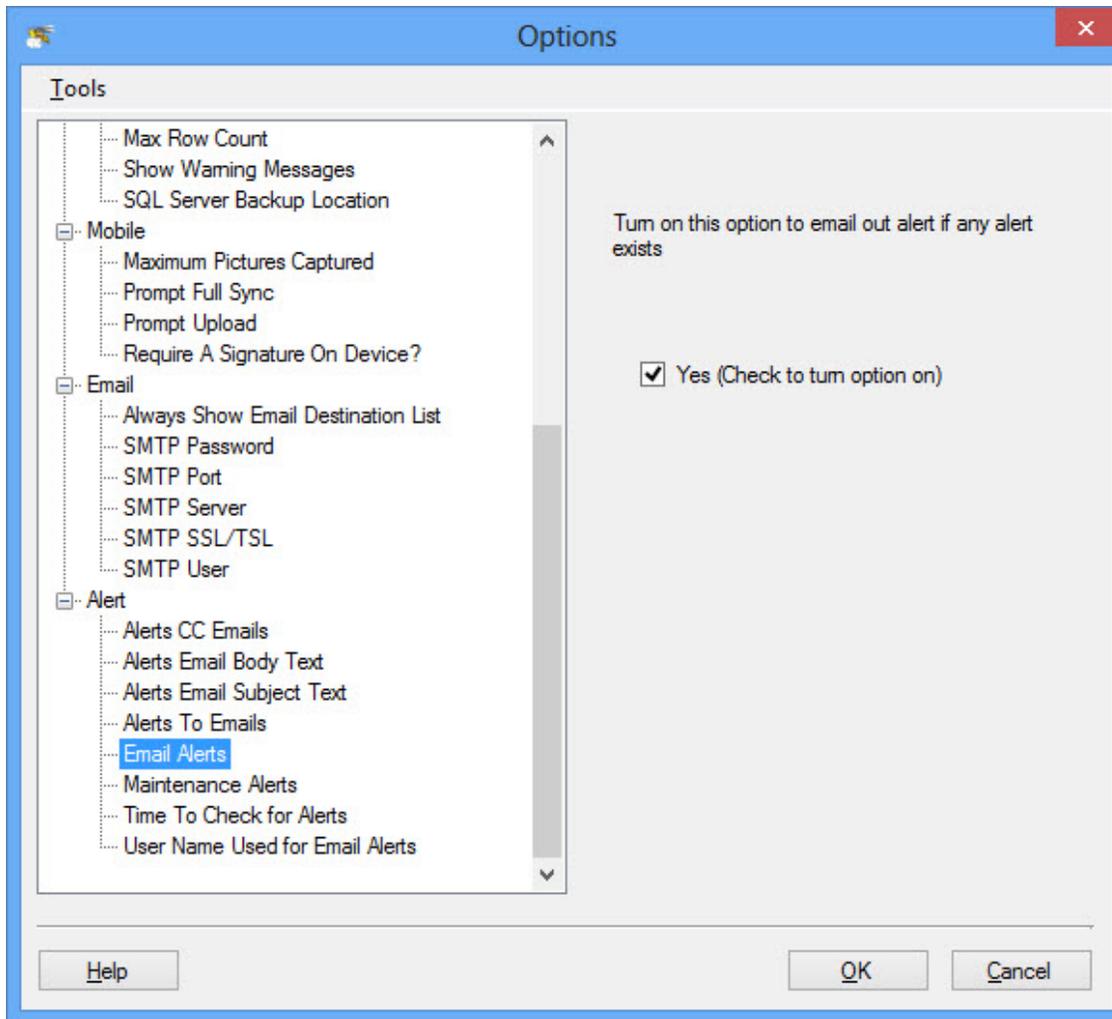
3. Enter the list of email addresses you want CC'd on the alerts email in the text field. Use a semicolon (;) to separate each email address as shown in the example above.

Email Alerts

Select this option to tell the software to email any addresses entered in the [Alerts To Emails](#) and [Alerts CC Emails](#) sections if an alert is found a the [Time To Check for Alerts](#).

1. To set this option, from the **Main** screen click **Administration > Options**.

2. On the **Options** screen, select **Alert > Email Alerts**.



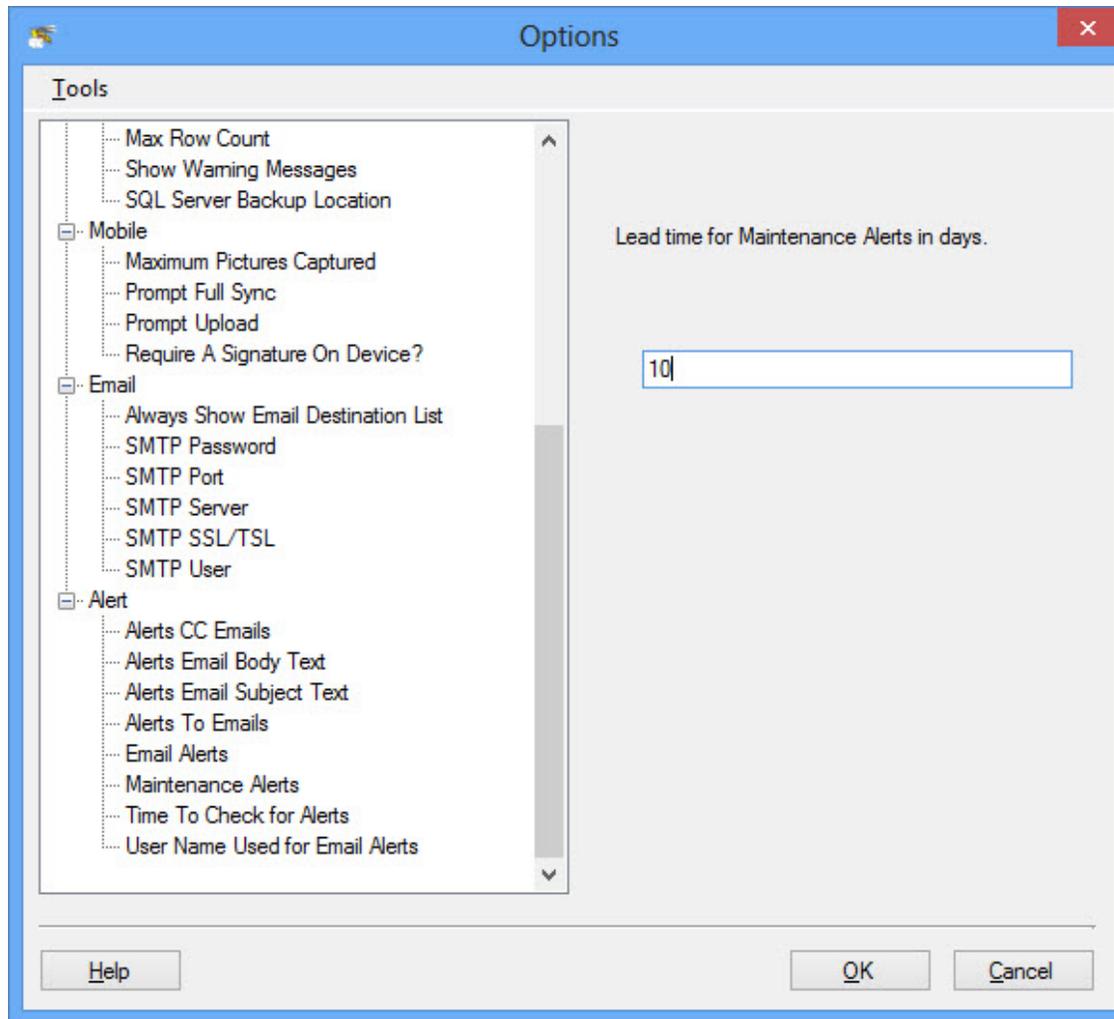
3. Select the Yes checkbox to turn this feature on. Leave the checkbox blank to turn off the email alerts function.

Maintenance Alerts

This option sets the lead days for Maintenance Alerts.

1. To set this option, from the **Main** screen click **Administration > Options**.

2. On the **Options** screen, select **Alert > Maintenance Alerts**.



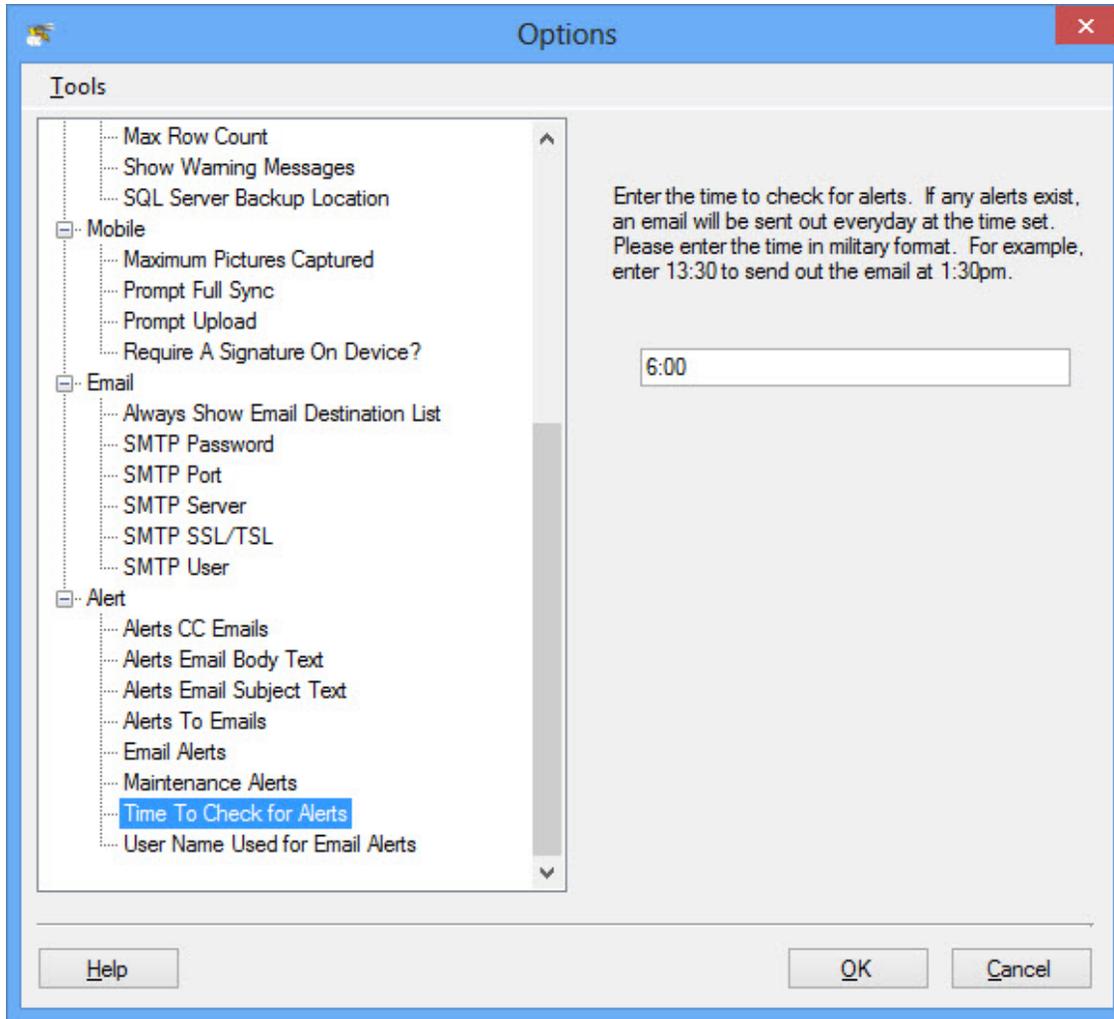
3. Enter the number of lead days in the text field. The default is 10.

Time To Check for Alerts

This option allows you to enter the time you want the system to email any existing alerts.

1. To set this option, from the **Main** screen click **Administration > Options**.

2. On the **Options** screen, select **Alert > Time to Check for Alerts**.



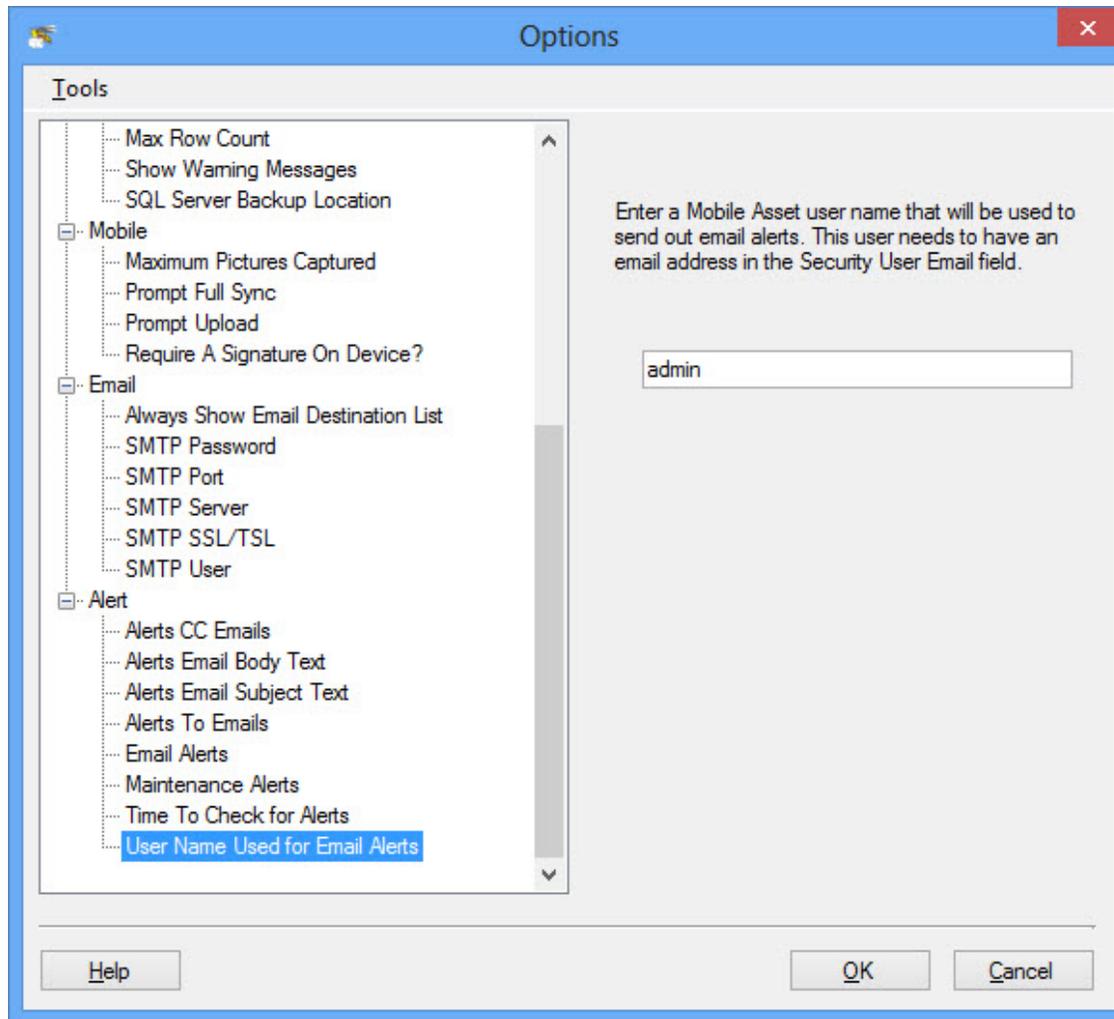
3. Enter the time to check for alerts in military format. For example, enter 13:30 to send out the email at 1:30 pm.

User Name Used for Email Alerts

This option allows you to enter the "From" email that will be used for the Alert Emails.

1. To set this option, from the **Main** screen click **Administration > Options**.

2. On the **Options** screen, select **Alert > User Name Used for Email Alerts**.



3. Enter the User Name you want to be used to send out email alerts. The software will use the email address from that user's [Security](#) profile as the "From" address on Alerts Emails. The designated user MUST have an email address entered in their [Security](#) profile.

Reminder Alert Options

These options control how reminder alerts are handled by MobileAsset. Reminder alerts are emails sent to users who have a checked out asset nearing its due date.

If this option is turned on, MobileAsset will send a reminder email to the employee/customer to whom the asset is checked out a set number of days before the due date. The number of days is set in the **Reminder Lead Time** field on the [New/Edit Asset Type](#) screen and is viewable on the [New/Edit Asset](#) screen.

Reminder Alert Options are:

[Email Reminder Alerts](#)

[Reminder Alerts Email Body Text](#)

[Reminder Alerts Email Subject Text](#)

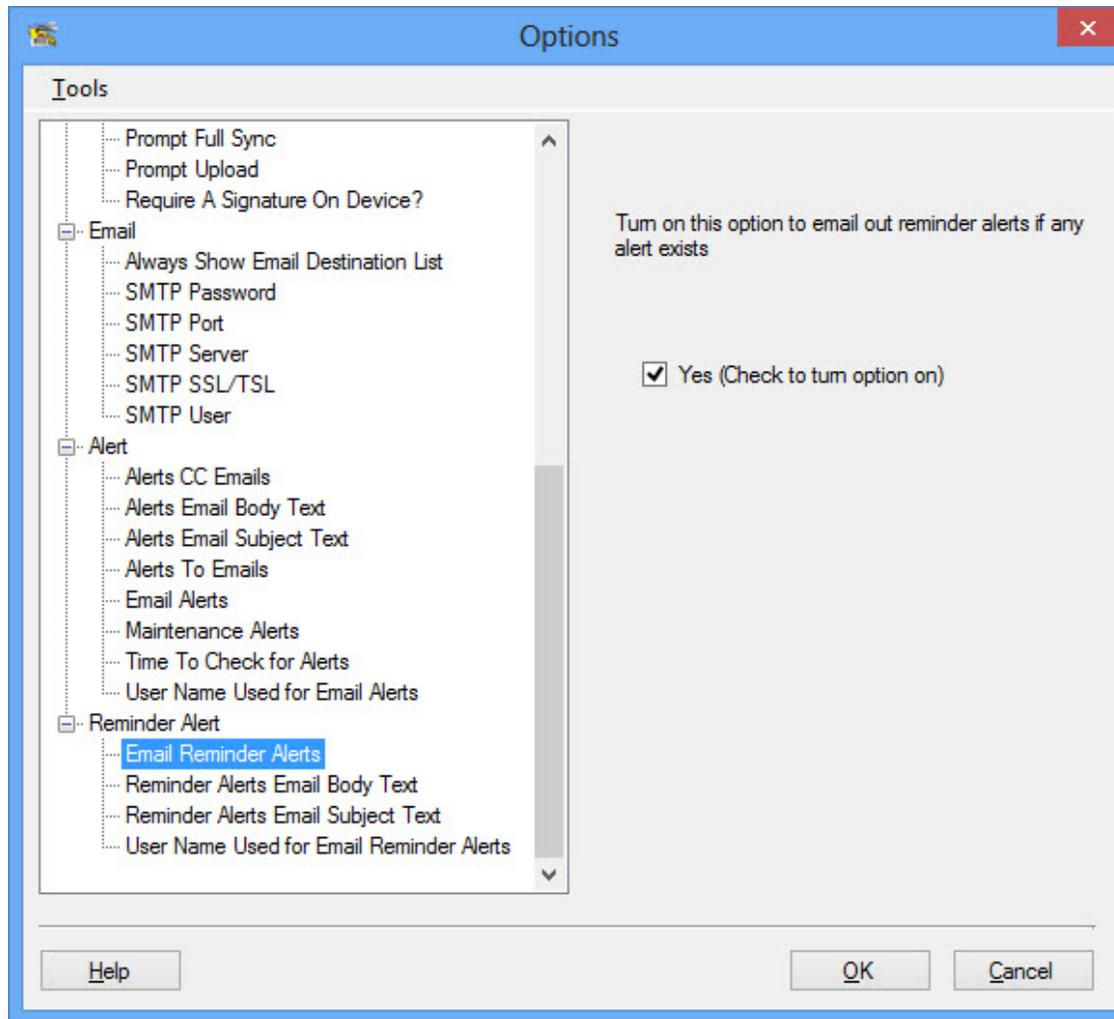
[User Name Used for Email Reminder Alerts](#)

Email Reminder Alerts

Use this option to turn on the email reminder alert function. This function is turned off by default.

1. From the **Main** screen, select **Administration > Options > Reminder Alerts > Email Reminder Alerts**.

2. Check the **Yes** check box to turn on this feature.



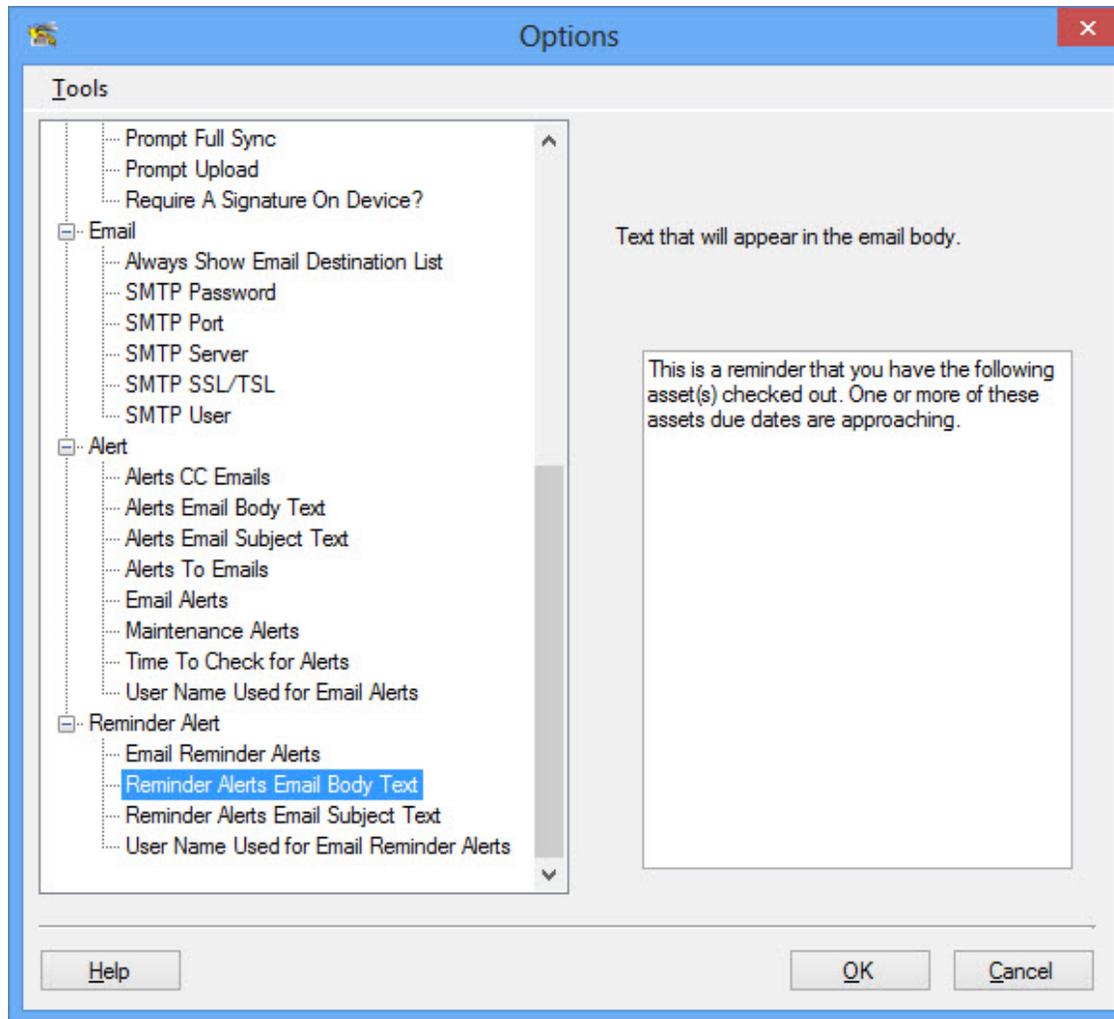
3. Click **OK** to save the change and close the **Options** screen.

Reminder Alerts Email Body Text

This option allows you to edit the body of the reminder email.

1. From the **Main** screen, select **Administration > Options > Reminder Alerts > Reminder Alerts Email Body Text**.

2. Click in the text box and make changes as needed.



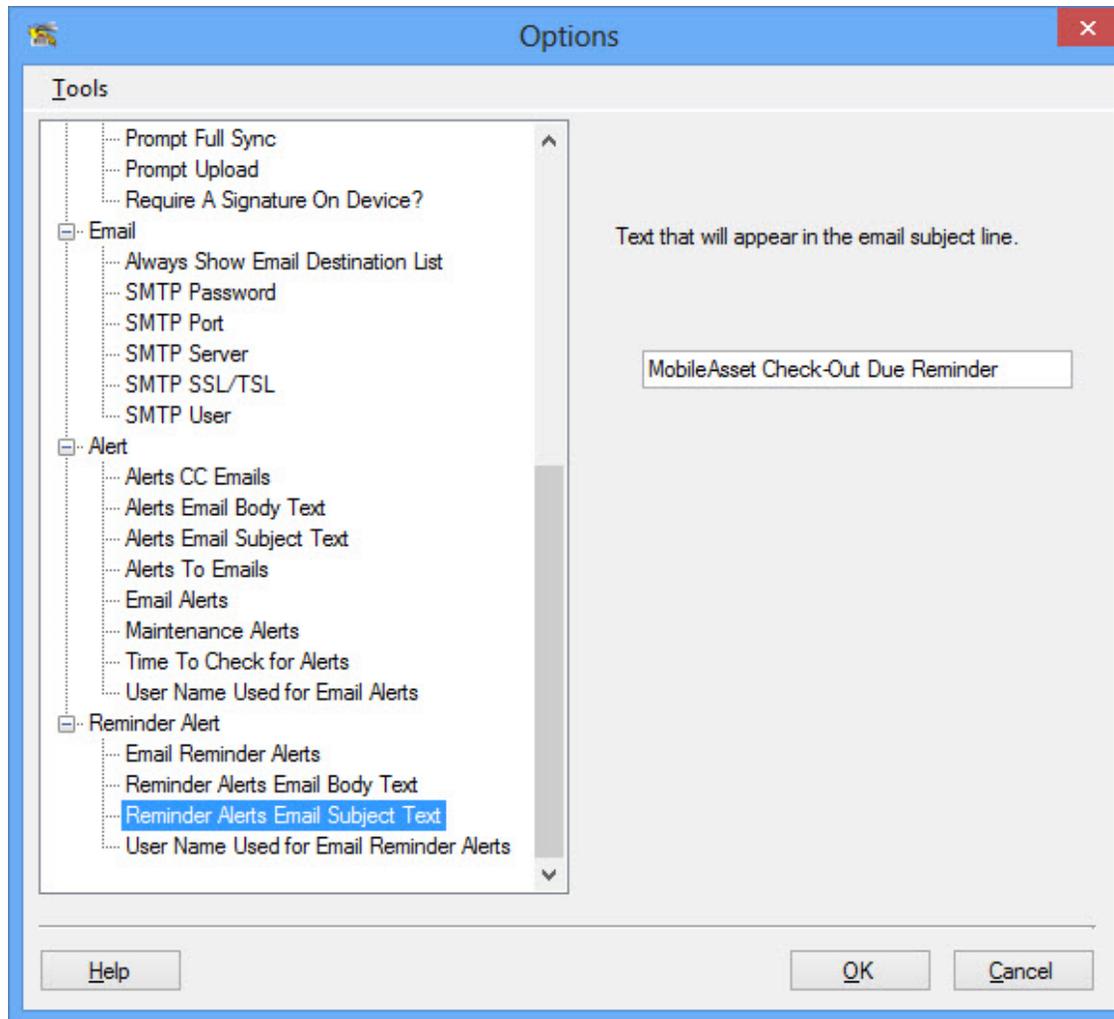
3. Click **OK** to save the change and close the **Options** screen.

Reminder Alerts Email Subject Text

This option allows you to edit the subject line of the reminder email.

1. From the **Main** screen, select **Administration > Options > Reminder Alerts > Reminder Alerts Email Subject Text**.

2. Click in the text box and make changes as needed.



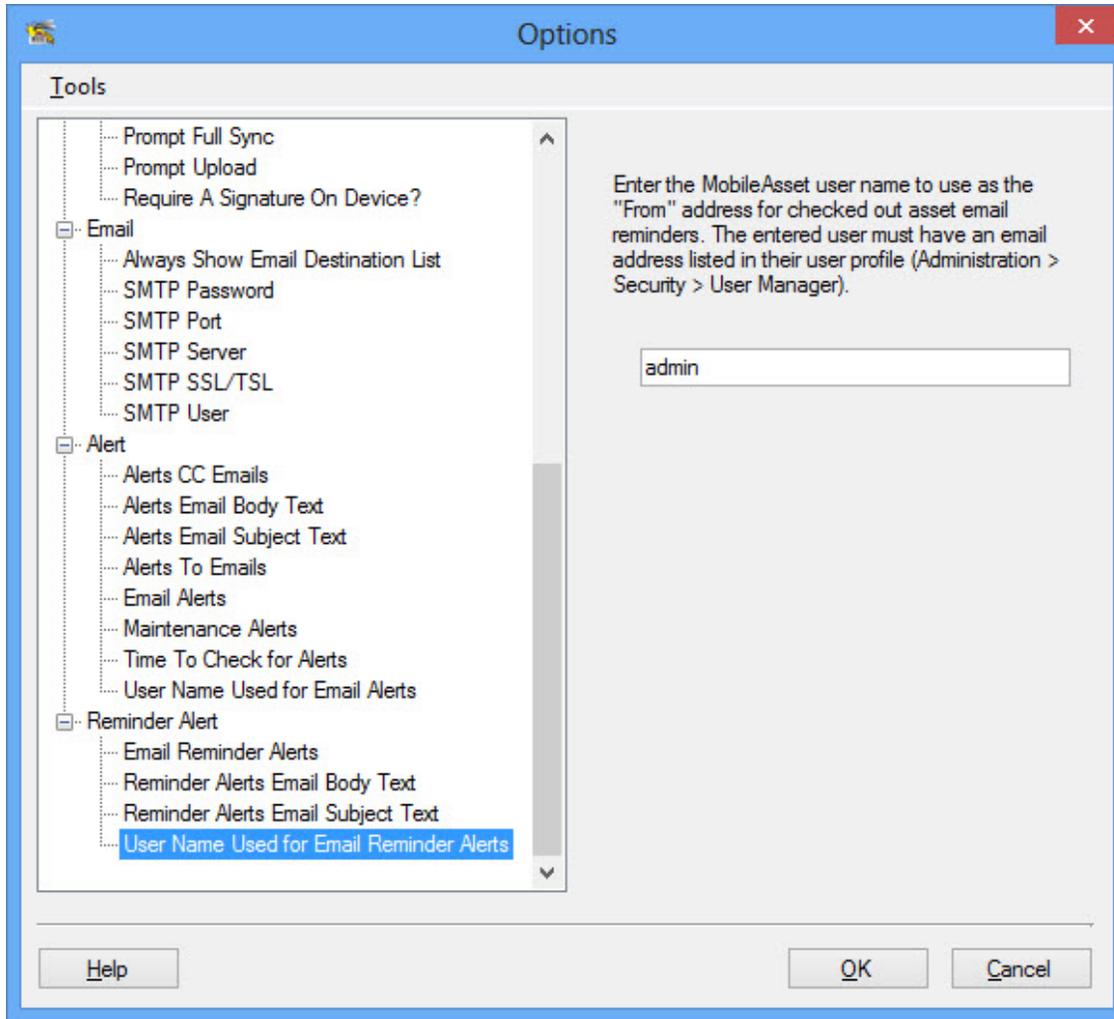
3. Click **OK** to save the change and close the **Options** screen.

User Name used for Email Reminder Alerts

This option allows you to enter the "From" email that will be used for the check out reminder emails.

1. From the **Main** screen, select **Administration > Options > Reminder Alerts > User Name used for Email Reminder Alerts**.

2. Click in the text box and enter the user name.



3. Click **OK** to save the change and close the **Options** screen.

Check for Software Updates

By default, the software will check for updates to the application and notify you if a more recent version is available. You can then access the software updates website and download the latest version. This ensures you are always working with the most up-to-date version available to you. This feature is turned on by default.

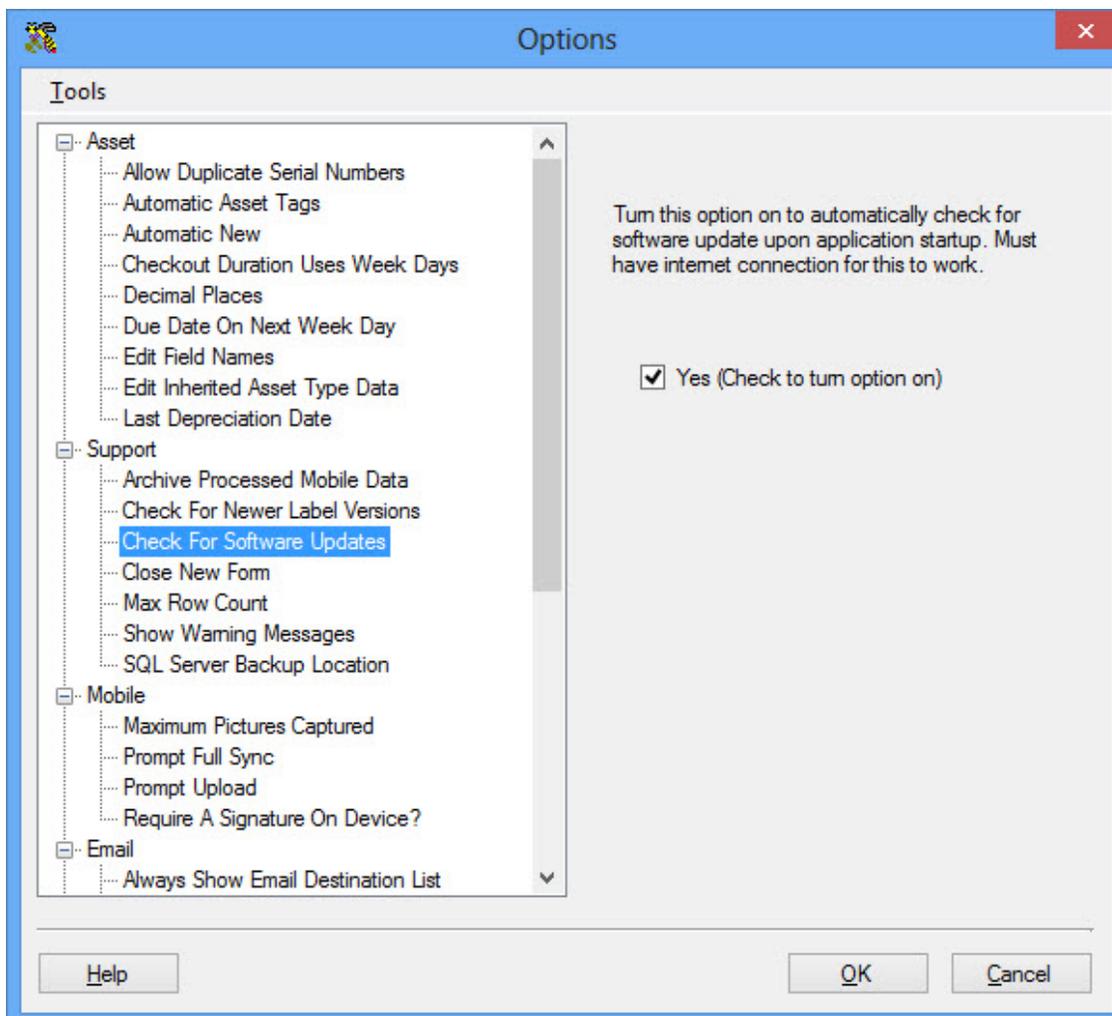
The software must be installed on a machine with Internet access to check for updates.

You can turn off the automatic check and perform periodic manual checks, or leave the option on and perform a manual check, if desired.

[To Disable the Automatic Version Check Feature](#) [To Perform a Manual Check](#)

To Disable the Automatic Version Check Feature

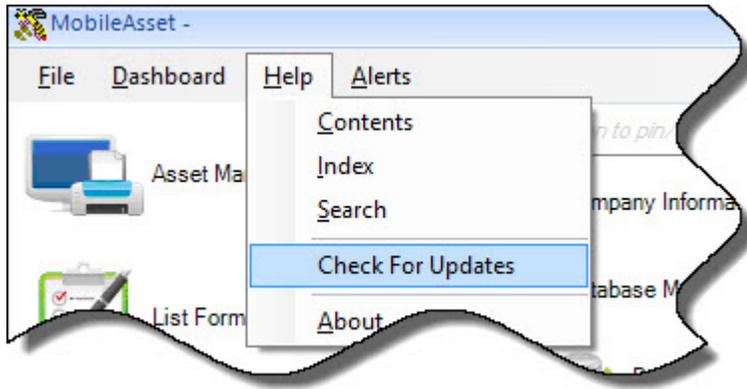
1. From the **Main** screen, select **Administration > Options**. The **Options** screen appears.
2. Highlight the **Automatic Check for Updates** option and deselect the **Yes** check box.



3. Click **OK** to save your changes and to **Close the Options** screen. The option is now disabled. You can manually check for updates as needed.
-

To Perform a Manual Check

From the **Main** screen, click **Help > Check for Updates**.



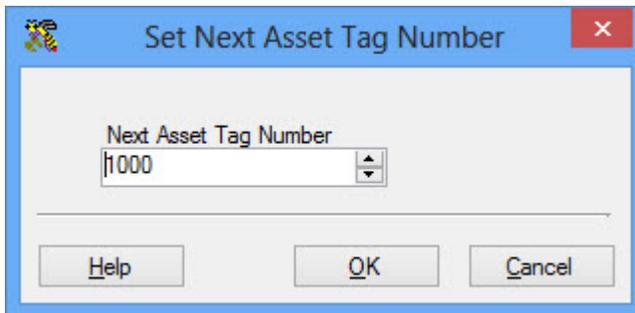
The system will automatically check for a newer version and notify you if one is available. This procedure can be performed at any time.

2.12.9 Setting Next Asset Tag Numbers

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 "1". 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 Tag Value** screen appears allowing you to select a start number. Below is an example of the **Set Next Tag Value** screen.

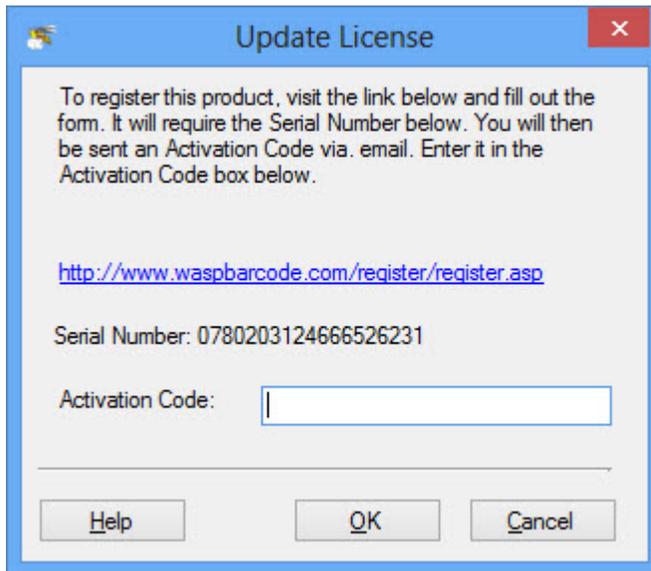


2. Enter the number you want to begin with, then click **OK**.

2.12.10 Update License

This function is used when you need to register the software to end your trial period. Remember that after the trial period you **MUST** register the software and complete this function in order to continue using the product. The login screen will remind you of how many days are left in your trial period each time you access the software.

1. From the **Main** menu by clicking **Administration > License Management**. The **Update License** screen appears:

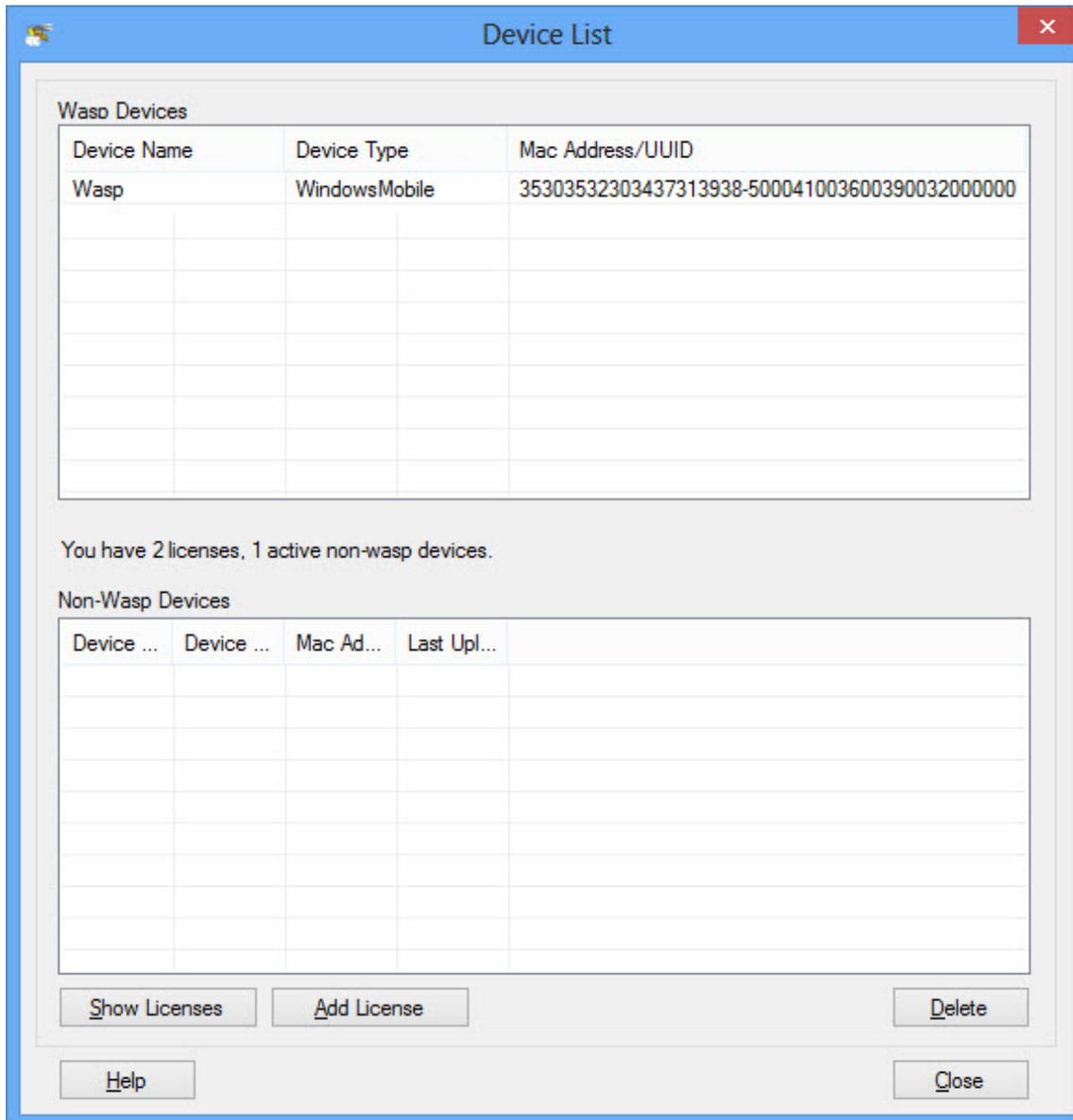


2. Click on the link provided on the **Update License** screen and complete the requested information. You will need the **Serial Number** on the **Update License** screen. After you have completed the information, an **Activation Code** will be provided. You must enter the activation code on the **Update License** screen.
3. After you have entered the **Activation Code**, click the **OK** button.
4. A confirmation message will appear when you have successfully registered the product.
5. You must exit the software and restart it after you have registered.

2.12.11 Device List

The **Device List** displays all mobile devices onto which you have loaded MobileAsset along with the last time you uploaded data from each device. You can also view your mobile licenses from this screen or add additional mobile licenses.

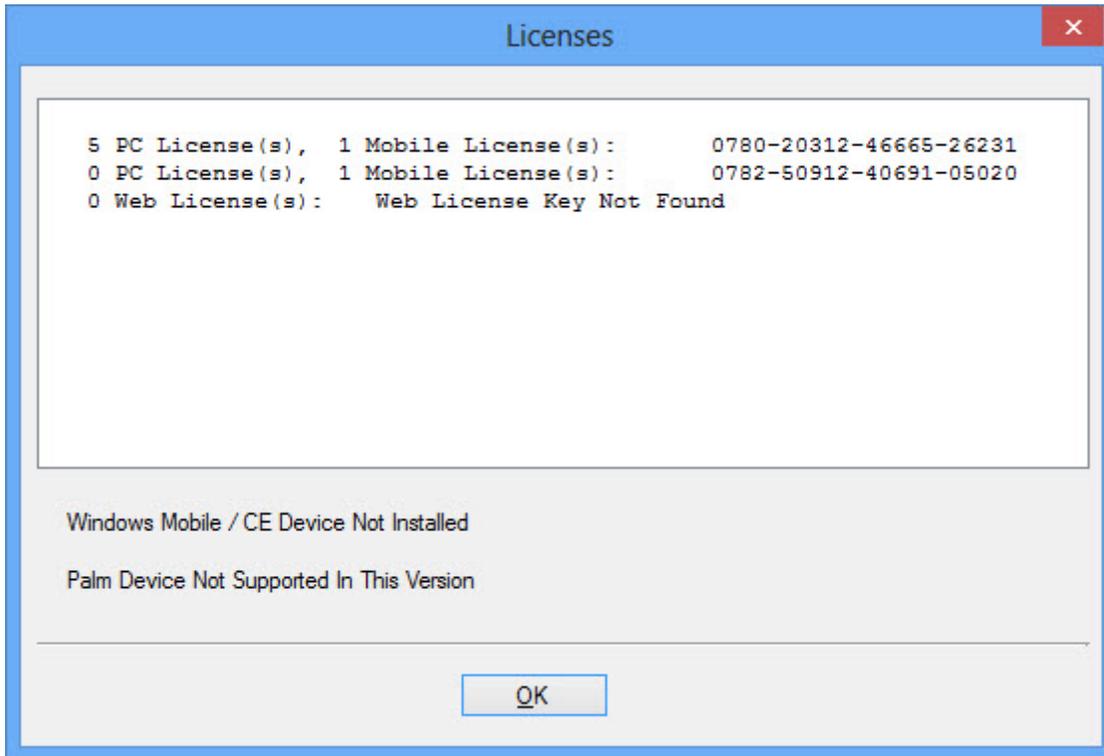
1. From the **Main** screen, click **Administration > Device List**. The **Device List** appears:



2. The top of the screen lists any Wasp Devices, such as the HC1, you have connected. The bottom of the screen displays any non-Wasp devices.

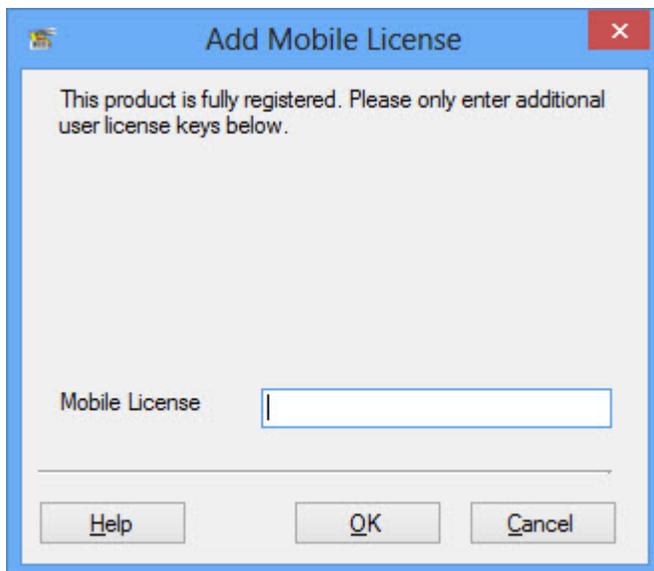
Note: Using a non-Wasp device with MobileAsset requires the purchase of an additional mobile license.

3. To view all licenses associated with the software, click the **Show Licenses** button. The **Show Licenses** screen appears:



Click **OK** to close the screen.

- To add an additional mobile license, click the **Add License** button. The **Add Mobile License** screen appears:



Enter the new mobile license, then click the **OK** button. You will return to the **Device List** screen.

- To delete a mobile device, highlight it in the list, then click the **Delete** button.

2.12.12 Service Configuration

This screen only appears if MobileAsset is being accessed from the machine where the service is installed.

Only users with Administration privileges will be able to see the Service Configuration option.

The **Service Configuration** button on the **Administration** menu opens the **Configuration Settings** screen. This screen displays the information contained in the MobileAsset service configuration file. Admin users can make changes to the data on this screen, which will update the service configuration file and the weblink.x file as needed.

1. From the **Main** screen, click **Administration > Service Configuration**.

The **Configuration Settings** screen appears:

This form is used to make adjustments to the MobileAsset service config file.

Download Port	10006
License Manager Port:	10007
License Manager Service Wait:	15
Data Source:	VMWIN8ENT64BSD\WASPD EXPRESS
Integrated Security	<input type="checkbox"/> Integrated Security
User ID:	AssetUser
Password:	••••••••••••••••
Database Name:	WaspConfig
Log File Size:	104857600
Log File Count:	10
Log Level:	0
User Logon Time Out:	28800
Base Address:	http://vmWin8ent64bsd:10008/

Print a barcode with the base address:

2. Make changes as necessary on this screen. Below are brief descriptions of the fields available on this screen.

- **Download Port** - This is the port used to download MobileAsset to a mobile device via WiFi. The default port is 10006. If you change the download port, the weblink.x file will automatically be updated with the new port.
- **License Manager Port** - The port used by the license manager. The default port is 10007.
- **License Manager Service Wait** - Indicates how many seconds before the license manager attempts to start the service again, in the event of a failed start. The default is 15 seconds.

- **Data Source** - The location of the database. The default is <computer name>\WASPDBEXPRESS.
 - **Integrated Security** - If you have sufficient security privileges on the machine where the database server is located, select the **Integrated Security** checkbox. This allows you to access the database without having to enter your user name and password (your network user name and password will automatically be used). if you do not have sufficient security on the machine, leave this box unchecked.
 - **User ID** - The database user ID. The default user ID is AssetUser.

 - **Password** - The database password. The default password is Serial#1Serial#1).

 - **Database Name** - The name of the MobileAsset database.

 - **Log File Size** - Indicates how large the log file is allowed to get before a new one is created. The log file size is measured in bytes. Default log file size is 104857600.

 - **Log File Count** - Indicates how many past log files are kept before the oldest is deleted. The default number is 10.

 - **Log Level** - Indicates how much information is logged (1-10). The default level is 0 - no logging. A higher number will result in more information being logged.

 - **User Logon Time Out** - The period of inactivity before the user is logged out.

 - **Base Address** - The location of the service, including the listening port. the default location is http://<computer name>.<domain name>:10008/.
3. Optionally click the **Print** button to print a barcode containing the **Base Address**.
 4. Click **Save** to save any changes. Click **Exit** to close the screen.

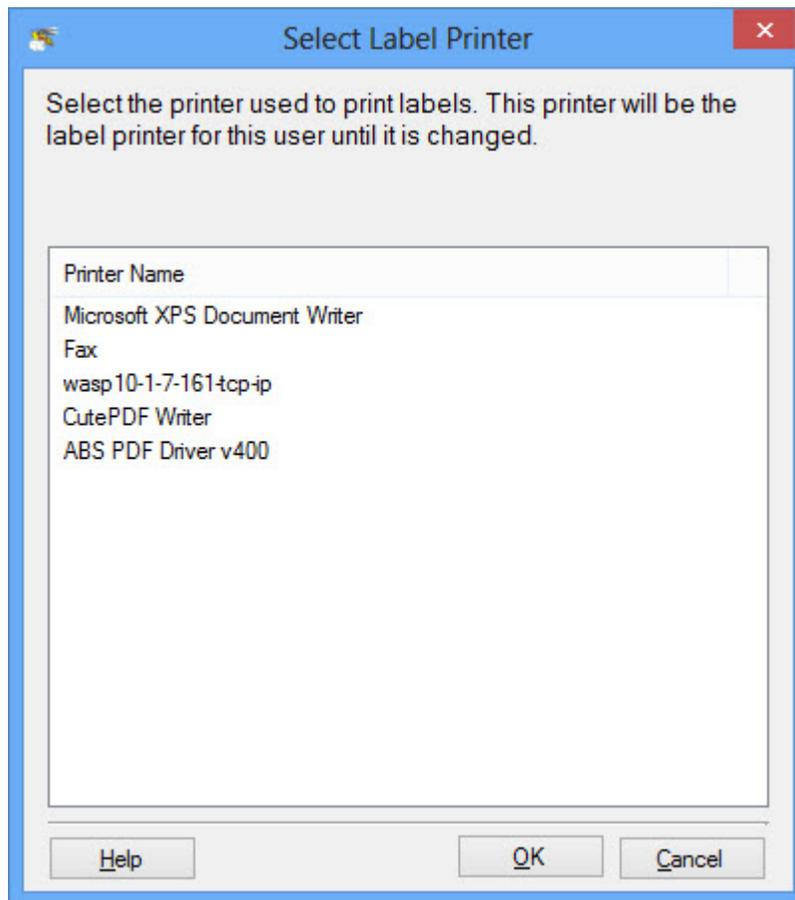
2.13 Creating/Editing/Printing Labels

2.13.1 Selecting a Label Printer

Before printing labels from the **List** screens or from the **Labels** menu, you must select a **Label** printer.

To Select a Label Printer:

1. To do this, click **File > Setup Label Printer**. The **Select Label Printer** screen appears:



2. All printers currently connected to this computer will appear. Highlight the printer you want to use, then click the **OK** button. You can now begin printing labels.

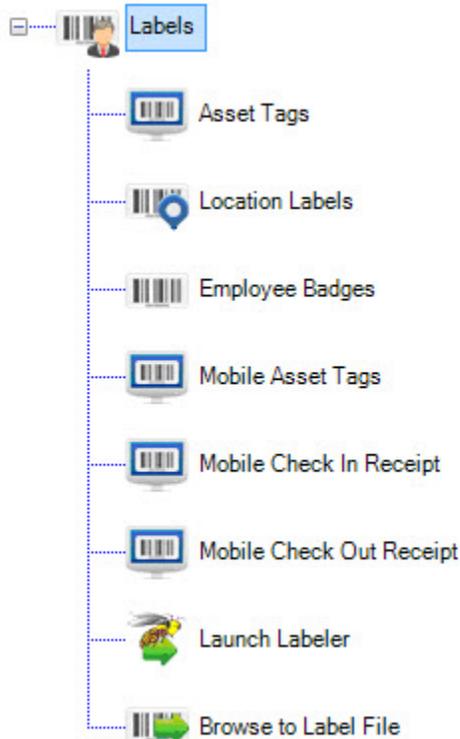
The software allows you to select from several pre-built labels that can be printed the list screens or edited from the **Labels** menu. You can also create your own unique labels from the **Labels** menu.

The following topics are covered in this section:

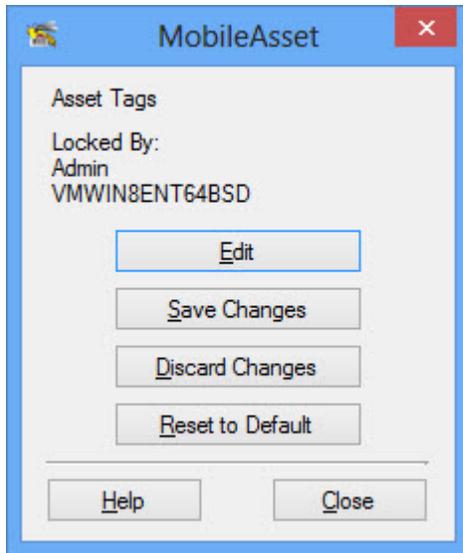
- [Editing Labels](#)
 - [Creating Custom Labels](#)
 - [Browsing to Label File](#)
-

2.13.2 Editing Labels

1. To edit labels, from the **Main** screen, click **Labels**. A list of available labels will appear. If you do not see all the label files shown here upon accessing the list, expand the menu by clicking the + in front of the **Labels** field.



- Click on the label you would like to edit. The following screen will appear:



- Click **Edit**. Wasp Labeler will open with the selected label displayed. You can make changes as needed. Please see the Wasp Labeler online help for detailed instructions on editing labels. To access the help, select **Help > Contents** from the Wasp Labeler toolbar.

Click **Save Changes** to save any changes you have made to the label. These changes will be saved to the database.

Click **Discard Changes** to discard your most recent changes (all changes since the last save).

Click **Reset to Default** to revert the label back to its default settings.

Note: When editing Mobile labels (Mobile Asset Tags, Mobile Check In Receipt, Mobile Check Out Receipt), the label will appear in a text editor in the ZPL language. The print script must be edited in ZPL. For information on the ZPL language, please refer to:

http://www.zebra.com/id/zebra/na/en/documentlibrary/manuals/en/zpl_ii_programming2.File.tmp/45541L-002_RA.pdf

- Click **Close** to close the **Edit** screen.
-

2.13.3 Create Custom Labels

- To create custom labels, from the **Main** screen, click **Labels**. A list of available labels will appear.
- Select **Launch Labeler** to open Wasp Labeler without opening an existing .LABX file.
- Create your label as desired. Please see the Wasp Labeler online help for detailed instructions on creating labels. To access the help, select **Help > Contents** from the Wasp Labeler toolbar.

Note: Save new labels created with Wasp Labeler, to the following folder: .Labels under the folder where you installed Asset. If you are unsure where this is, just use the Windows Find (or Search) command to locate the folder containing the file **Asset.exe**, then save your .LAB files in the .Labels folder beneath it.

2.13.4 Browse to Label File

You may have custom labels you have already created that you want to access. To do this:

1. To browse to an existing label file (.LABX file), from the **Main** screen, click **Labels**. A list of available labels will appear.
2. Select **Browse to Label File**. A browser window will open to C:\ProgramData\Wasp Barcode Technologies\MobileAsset\7.0.0.0\Labels where labels are stored.
3. Navigate to the desired .LABX file and select it. The label will open in Wasp Labeler allowing you to edit or print it.

2.13.5 Printing Labels/Asset Tags from the List Screens

MobileAsset 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

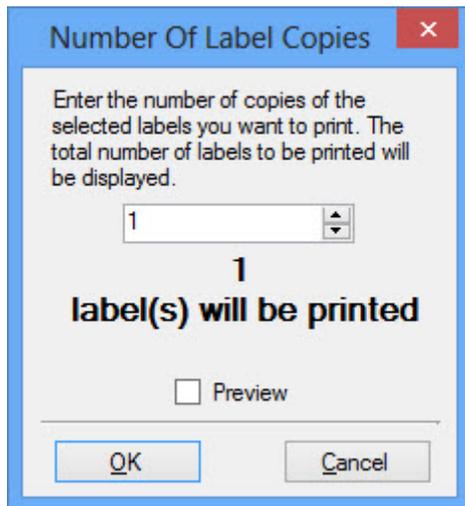
Note: You must select a label printer prior to printing tags from the **List** screens. To do this, see the topic [Selecting a Label Printer](#).

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:



The dialog box is titled "Number Of Label Copies" and has a close button (X) in the top right corner. The main text reads: "Enter the number of copies of the selected labels you want to print. The total number of labels to be printed will be displayed." Below this text is a spin box containing the number "1". Underneath the spin box, the text "1 label(s) will be printed" is displayed in a larger font. At the bottom of the dialog, there is a checkbox labeled "Preview" which is currently unchecked. At the very bottom, there are two buttons: "OK" and "Cancel".

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

2.14 Reports

2.14.1 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.

1. Reports are accessed from the **Main** screen 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**.

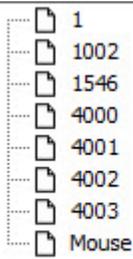
The screenshot shows the SAP Crystal Reports Report Viewer interface. On the left is a 'Main Report' tree view with a group tree containing asset tags: 1, 1002, 1546, 4000, 4001, 4002, 4003, and Mouse. The main report area displays the following table:

Asset Tag	Description	Purchase Order	SerialNo	Purchase Date
1	1: Example Asset			
1002	Monitor 17": Monitor 17"			
1546	Monitor 17": 17" Monitor			
4000	Laptop IBMThinkPad: T61 Units			
4001	Laptop IBMThinkPad: T61 Units			
4002	Laptop IBMThinkPad: T61 Units			
4003	Laptop IBMThinkPad: T61 Units			
Mouse	Mouse: Mouse			
				Total: \$150.00

The status bar at the bottom of the viewer displays: Current Page No.: 1, Total Page No.: 1, and Zoom Factor: 100%.

The Status Bar in the example above, displays the Current Page being viewed, the Total number of pages and the current Zoom Factor.

In the example above, **The Group Tree** (shown below) displays Asset Tags. Clicking on an Asset Tag will display that Asset in the Report area to the right.



The **Report Viewer Tool Bar** (shown below) provides a variety of functions. These are described below in order.



Export - allows you to save the report as your choice of any of the following formats:

Adobe Acrobat® Reader™ (.pdf file)

Microsoft® Excel (.xls file)

Microsoft® Word (.doc file)

or Rich Text Format (.rtf file)

Print - launches the Print form.

Refresh - updates the report with current data.

Copy - allows you to save a copy of the report.

Toggle Group Tree - Adds or removes the Group Tree panel.

Arrow Buttons - allow you to navigate through pages of the reports: go to page 1, advance 1 page, go back one page, go to last page.

Search - allows you to find all occurrences of a specified keyword with the displayed report.

Zoom allows you to scale the Report display via a drop list of percentages.

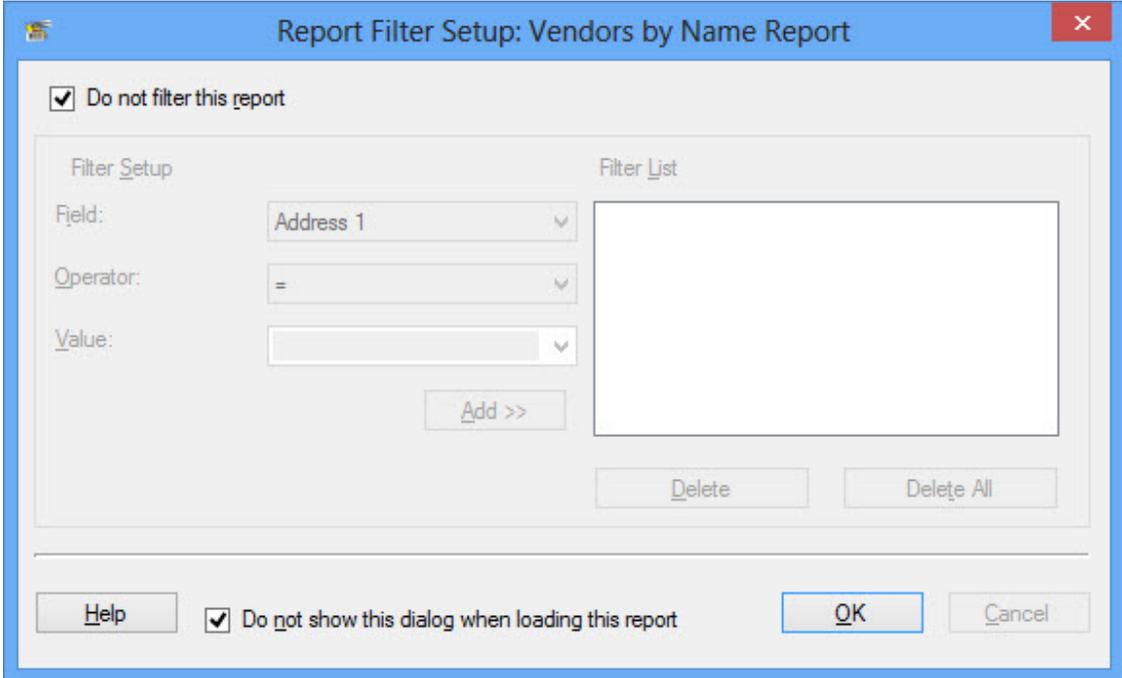
Filter opens the [Report Filter Setup](#) form.

Depending on the number of transactions in your database, the Report you have selected, and the performance of your PC, The Report Viewer can remain blank for quite some time while it accesses the database and dynamically builds the report for display.

2.14.2 Report Filter

You can filter reports in the software to only display selected information. This allows you to tailor reports to your specific needs.

1. To filter a report, after you have generated the report, click the Filter  button on the [Report Viewer's](#) toolbar. A screen similar to the following will appear:



Report Filter Setup: Vendors by Name Report

Do not filter this report

Filter Setup

Field: Address 1

Operator: =

Value:

Add >>

Filter List

Delete Delete All

Help Do not show this dialog when loading this report OK Cancel

2. Begin by removing the checkmark from the **Do not filter this report** checkbox. The fields on the screen will be enabled.

Make selections from the drop down lists. You can select specific **Fields**, such as Asset Tag, **Operators**, such as equals, less than or greater than, and **Value**, the information contained in the fields. Then use the **Add>>** button to add filters to the **Filter List**.

Report Filter Setup: Assets by Asset Tag Report

Do not filter this report

Filter Setup

Field: Asset Tag

Operator: =

Value: 1002

Add >>

Filter List

Asset Tag = 1002

Delete Delete All

Help Do not show this dialog when loading this report OK Cancel

One or more filters can be added before clicking the **OK** button to return to the Report Viewer where the data will now be limited by the filters in the Filter List.

Once a Filter has been defined for a report, it will remain in effect for subsequent executions of that report. Each report can retain the last Filter Setup applied. Open the filter dialog and check the **Do not filter this report** checkbox if you want to see an unfiltered report.

2.15 Working with Multiple Companies

Enterprise Version Only

The Enterprise versions 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. Remember that 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 **Select Company screen** 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. Basically, you will need to follow the steps in Getting Started for each company you create.

2.15.1 Using the Select Company Screen

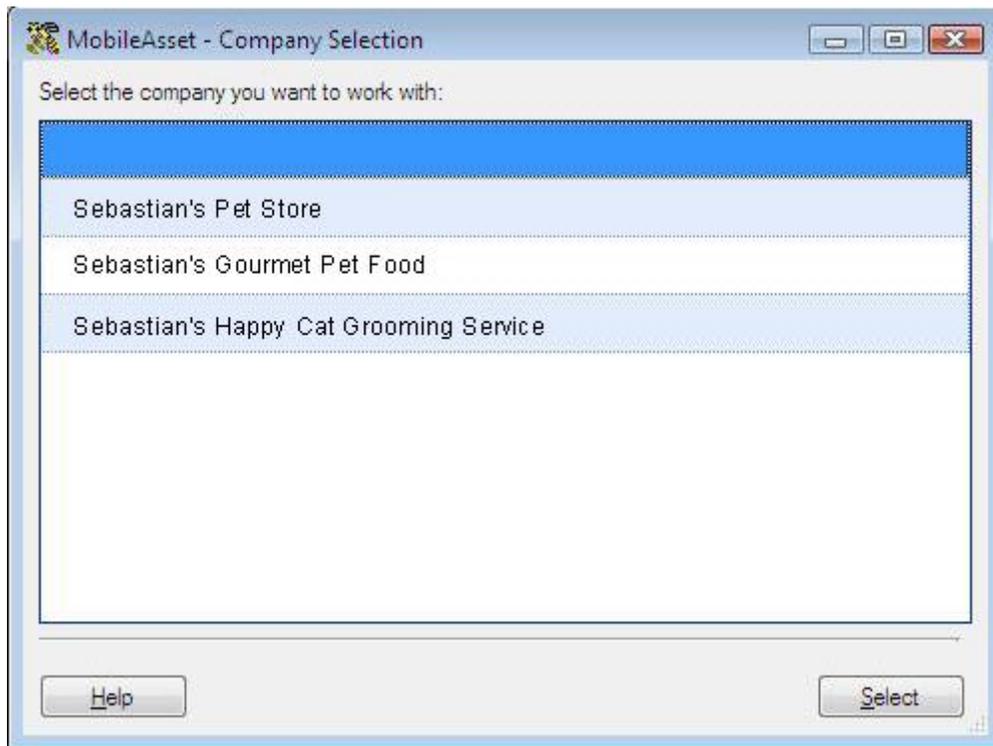
This screen applies to the Enterprise version only.

The **Select Company** screen 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 screen 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. The first time you log in using the Admin login, you will see all companies.



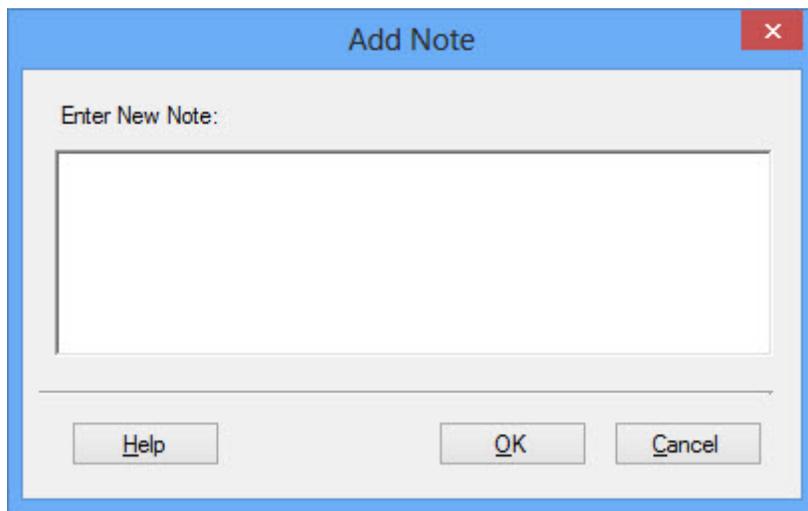
Highlight the company that you want to access.

2. Click the **Select** button. 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.

2.16 Notes

You can add notes to several fields in the software in order to associate any comments you may have with the record you are creating or editing.

1. To add notes to a screen, click on the **Add Notes** button (not all screens/fields have this capability). The **Add Note** screen appears:



2. Enter your notes in the text box, then click **OK** to save and exit. Notes are appended to any notes previously added the record you are editing.

Notes cannot be edited or removed once posted.

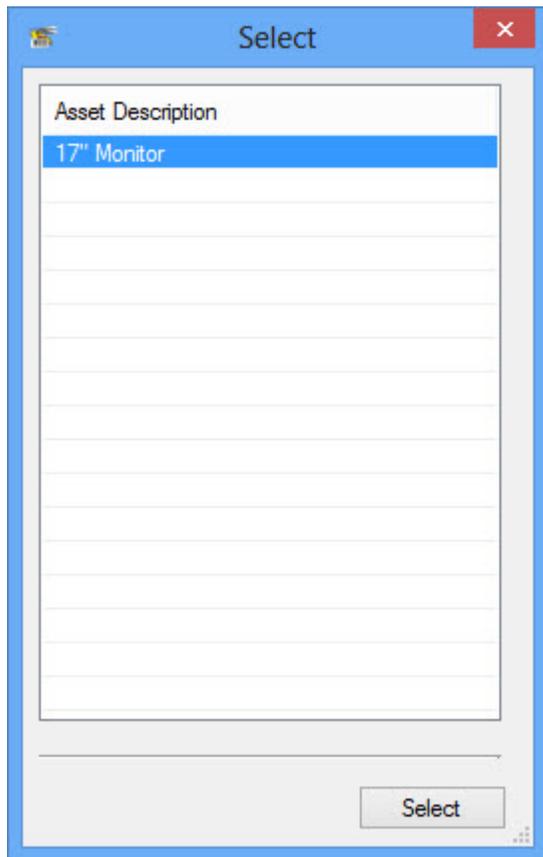
2.17 Simple Find

Find allows you to easily search for information within the database.

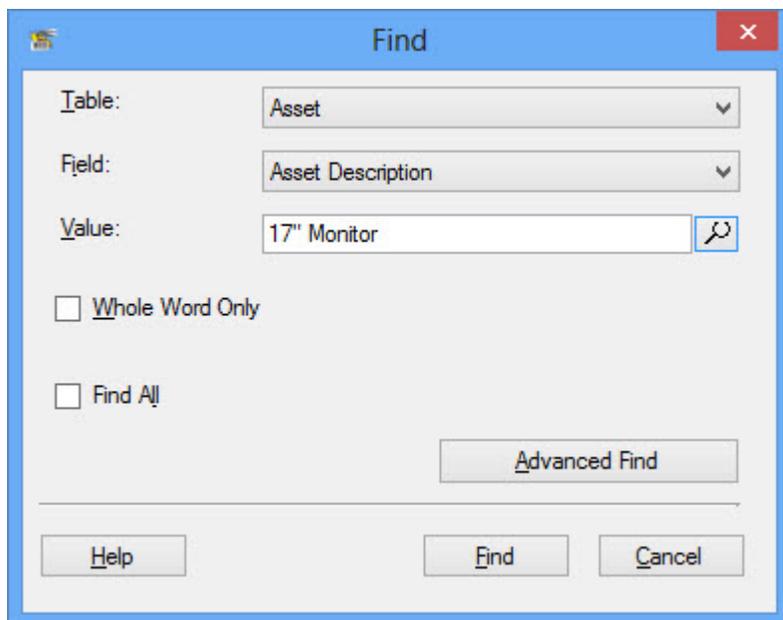
1. To access the **Find** screen, from the **Main** screen, click **Asset Management > Find > Simple Find**. The **Find** screen appears:

2. The **Find** screen contains three fields by which you can search for information:
 - **Table** is used to select the *table* (Information you enter into each field in MobileAsset is stored in a database "table" behind the scenes. You can extract this information using the Export Wizard.) in the database you want to search. Make a selection from the drop down list.
 - **Field** is used to select the field in the listed table to be searched. All fields found in the selected table will appear in the drop down list. Make a selection from the drop down list.
 - **Value** is the information contained in the field (For example, Printer might be the value in the Asset Type field). Type in the information for which you are looking, or click the Magnifying Glass button to the right of the field to search all values contained in the selected **Field**. You can also scan a value into this field.

For example, if you want to search for an asset description but cannot remember the exact description, select Asset in the **Table** field and Asset Description in the **Field** field, then select the Magnifying Glass button. A screen will appear displaying all values in the Description field (see example below):



Highlight the desired listing and click **Select**. The **Find** screen will populate with your selection as shown below:



Enabling the **Whole Word Only** option will search the selected table based upon the entire string in the value field excluding partial matches. If this checkbox is not selected, the system will return partial matches, meaning if you enter Printer in the Value field, the search would return Printer, Print, Printers, Printed, etc.

Enabling the **Find All** option disables the **Field** and **Value** fields and will return all of the records from the table selected in Search.

3. Click the **Find** button to start the search process. When complete, a list will be displayed showing all the records that match your criteria.
 - All searches are case insensitive.
 - Your last Find criteria are saved and will automatically be loaded the next time you access Find.

Examples:

For these examples, assume that the Customer table is made up of three records containing one field, called FirstName. The values in this field are Fred, Frederick, and Sam.

Example	Table	Field	Value	Whole Word Only Option	Find All Option	Search Result
1	Customer	FirstName	Fred	Off	Off	2 records: Fred; Frederick
2	Customer	FirstName	Fred	On	Off	1 record: Fred
3	Customer	FirstName	Mike	Off	On	3 records: Fred; Frederick; Sam

Notes:

- [Advanced Find](#) can be selected from the Asset Management tree also. It allows you to use complex search criteria.
- Keep in mind that your numbers are stored with up to four decimal places. If you set the [Decimal Places](#) 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.

2.18 Advanced Find

The **Advanced Find** screen allows you to search for information in the database using a variety of criteria. You can use these criteria options to narrow your search.

1. Access the **Advanced Find** screen from the **Main** screen by selecting **Asset Management > Find > Advanced Find**. Below is an example of the **Advanced Find** screen.

2. The **Advanced Find** screen consists of seven fields that allow you to select criteria to narrow your search. The **Filter Expression** panel displays the "filter" as you enter information in the criteria fields. The filter is simply the criteria you have selected. For example, if you select the following information:

Table: Asset
Field: Asset Tag
Operator: =
Value: 198

then the **Filter Expression** field will display this information and the system will search for Assets with the asset tag number 198.

Below are descriptions of each of the criteria fields:

Table - used to select the *table* (Information you enter into each field in MobileAsset is stored in a database "table" behind the scenes. You can extract this information using the Export Wizard.) you want to search within the database.

Parenthesis - (open and close) used to control the order in which criteria will be processed. The inner most pair of parentheses in any filter expression are evaluated first.

Field - used to select the field you want to search within the specified table.

Operator - a comparison operator used to evaluate an expression.

Comparison Operator	Meaning
=	equal
<>	not equal
>=	greater than or equal

>	greater than
<=	less than or equal
<	less than
Like	is similar to value
Not Like	is not similar to value
Is Null	no value
Is Not Null	any value

Like and **Not Like** are used for text pattern matching. They can only be used with plain text fields, not with dates. The following characters, used within the text value, have a special meaning for the Like and Not Like operators:

LIKE Operator	Meaning	Examples
_ (underscore)	matches any single character	LIKE '_-inch' matches '2-inch', '3-inch', etc.
%	matches zero or more characters of any value	LIKE 'Eric W%' matches 'Eric White', 'Eric Williams', etc.
\	Escapes the special characters (gives them their normal meaning)	LIKE '\%' matches '%' LIKE '\\' matches a single '\'

Value - the information for which you are searching. (This can include special characters for the Like or Not Like operators).

Logical - a Boolean operator that combines one or more filter expressions into a single logical group:

Boolean Operator	Meaning
AND	gives you the intersection of two conditions
OR	gives you the union of two conditions

- Enter the desired values for the seven **Advanced Find** fields to construct a filter fragment, or part of the Filter Expression.
- Click the **Add** button after building each filter expression to add it to the Filter Expression list.

The **Move Up** and **Move Down** buttons allow you to move a filter fragment toward the top or toward the bottom of the list, respectively. To reposition a filter fragment in the Filter Expression panel, click on it, then click either the Move Up or Move Down button.

You can edit a filter fragment by first selecting the fragment in the Filter Expression list. The values of the filter fragment populate the seven input fields. Update any of these fields, then click **Replace** to update the selected filter fragment in the Filter Expression list.

Click the **Check** button to check the syntax of the Filter Expression.

5. Click the **Find** button to start the search process. When complete, a list will be displayed showing all the records that match your criteria.

Notes:

- Searches are not case sensitive.
- To search for a specific date, build your filter expression to include a time range of 12:00am to 11:59pm for the given date. For example, the filter expression Date >= 12/25/02 12:00am to 12/25/02 11:59pm will return all records that have the date 12/25/02.
- Keep in mind that your numbers are stored with up to four decimal places. If you set the [Decimal Places](#) 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.
- A **Simplified** search can be conducted using the [Simple Find](#) screen.

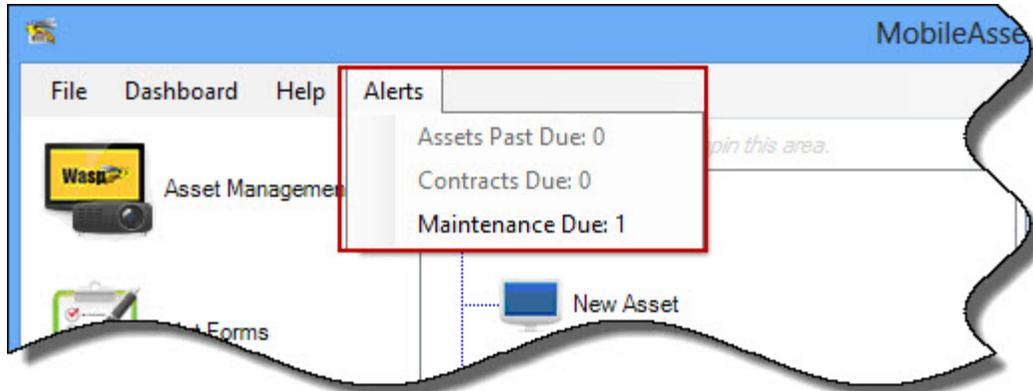
2.19 Working with Alerts

Alerts are not available in the Standard edition of MobileAsset.

MobileAsset will alert you if there are overdue checked-out assets, contracts/licenses that have expired and/or maintenance that is past due.

You can quickly check if any of these items are past due by following the instructions below:

1. From the **Main** screen, click **Alerts**. A drop down list will notify you of any overdue items as shown below:



2. Click on a listing to be taken to a list of the items that are past due. For example, to see what asset is checked-out and past due, click **Assets Past Due**. The **Asset List** will appear displaying the overdue asset. You can then follow up as needed to make sure the asset is not lost, etc.

Chapter 3 - Mobile Device Operation

3.1 Troubleshooting your Wireless Connection

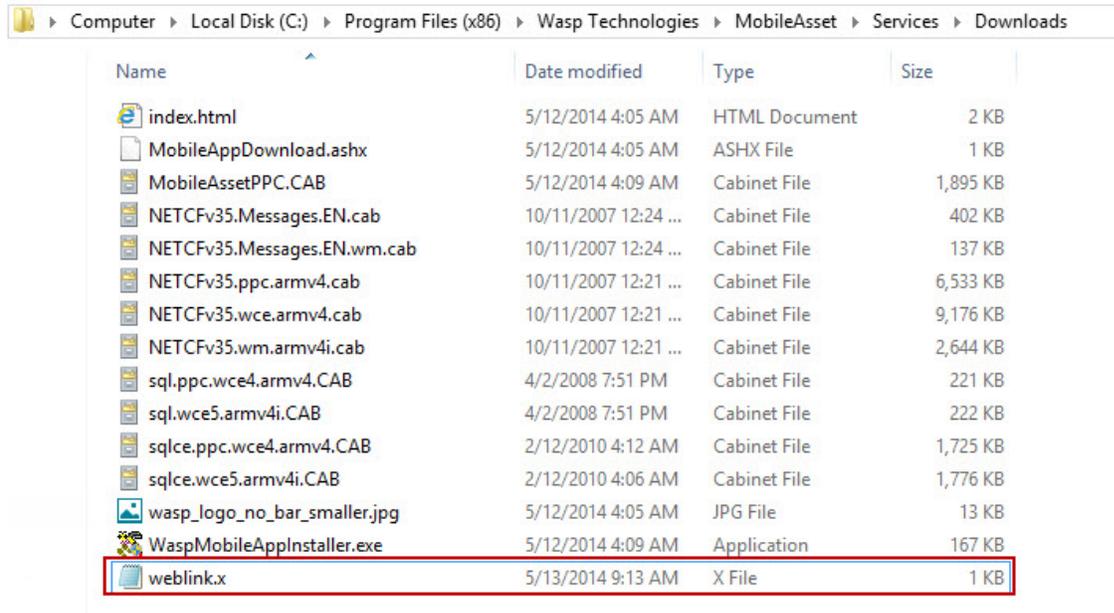
Depending on how your network is configured, you may receive a "Page not found" message when trying to access the MobileAsset download page. This can occur if:

- the PC name is not correct,
- there is an issue with the DNS servers returning the correct IP address, or
- the network is not routing the DNS request correctly.

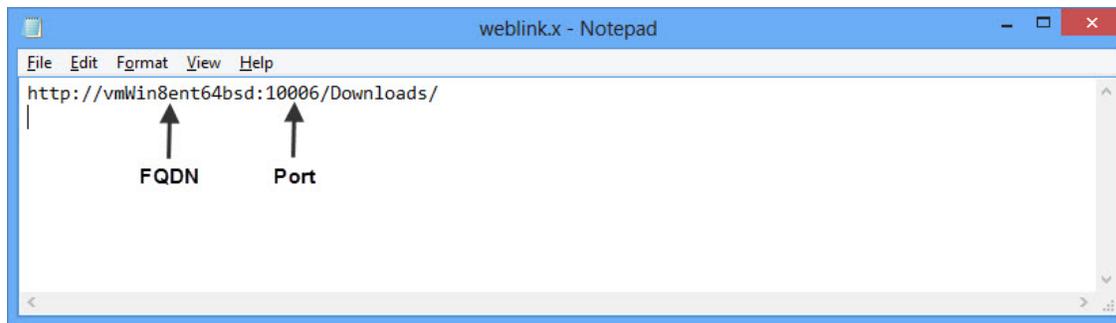
Please check with your IT department for a resolution. If the issue cannot be resolved you can try to update the weblink.x file with the computer's IP address (instructions are provided below). If the computer is on DHCP please have your IT department reserve the address so that it will not change in the future.

3.1.1 Update the weblink.x File

1. Verify your computer's IP address using the method described in the section [Verify IP Address](#).
2. From Windows Explorer, navigate to the location where you installed MobileAsset (the default location is C:\Program Files (x86)\Wasp Technologies\MobileAsset).
3. In the MobileAsset folder, select **Services > Downloads**. You will see a file named weblink.x.



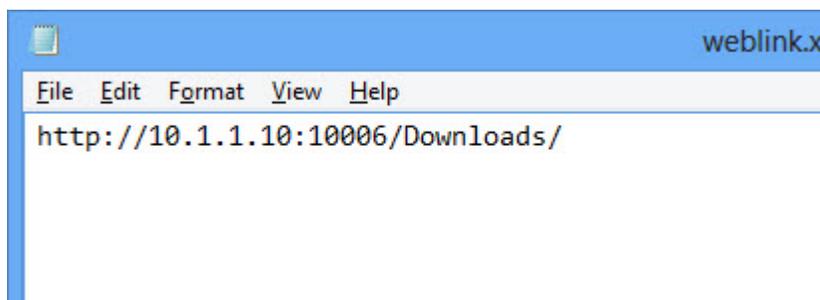
4. Right click on the file weblink.x, then select **Open With**.
5. From the **Open With** menu, choose WordPad or another word processing software. The weblink.x file will open displaying your FQDN entered during installation followed by the port number.



6. Edit the FQDN to be the IP address.

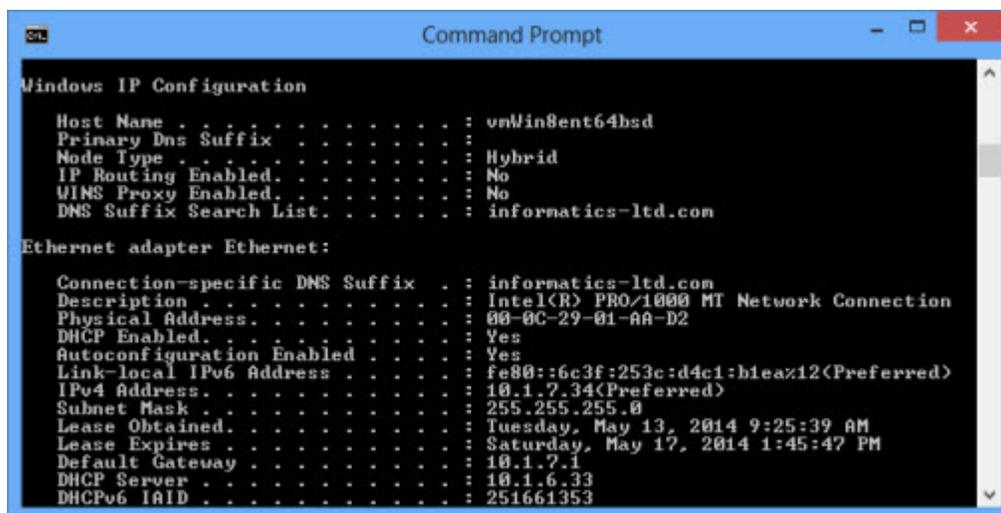
It should read: `http://<IPADDRESS>:10006/Downloads/`

So, for example, if your IP address is 10.1.1.10, it would read as follows: `http://10.1.1.10:10006/Downloads/`, as shown below:



3.1.2 Verify IP Address

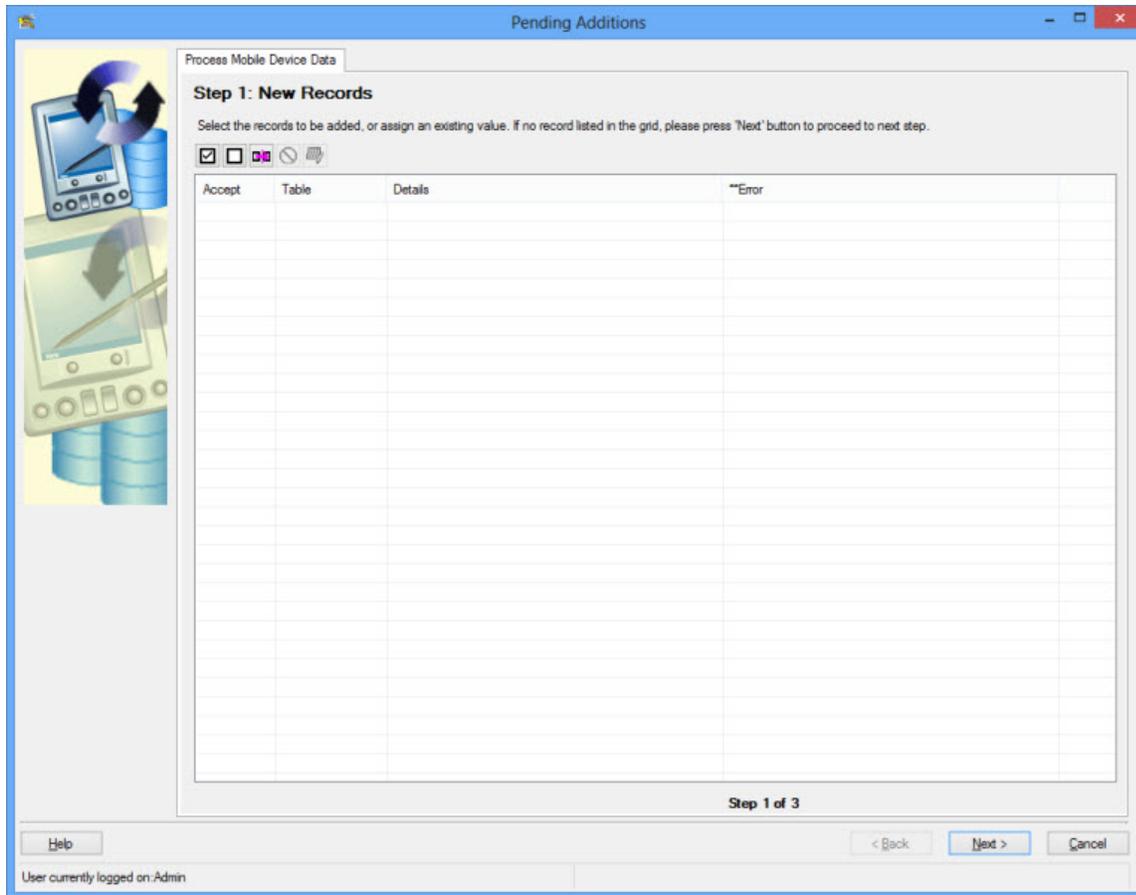
1. Select the Start (Windows icon) key on your keyboard, then enter CMD in the search field. CMD.exe will appear in the Programs section. (In Win8, select the CMD icon from the toolbar.)
2. Select cmd.exe from the Programs section of the Start menu. The CMD screen appears.
3. On the CMD screen, enter IPCONFIG/all at the prompt. Configuration information for your machine will appear on the screen as shown below:



3.2 Mobile Error

The **Mobile Error** option opens the **Pending Additions** screen. **Pending Additions** allows you to select data for acceptance into the MobileAsset database (on the PC) and to correct errors on data before it is entered into the database. This data has previously been collected from one or more mobile devices via synchronization.

1. To access this function, from the **Main** screen, click **Mobility > Mobile Errors**.
2. The **Pending Additions** screen appears.

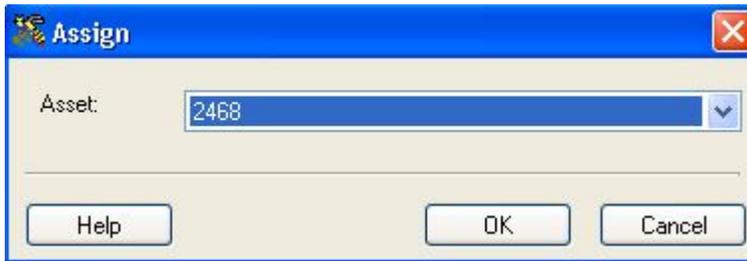


3. Any new records that have errors which need to be addressed are listed on the screen.

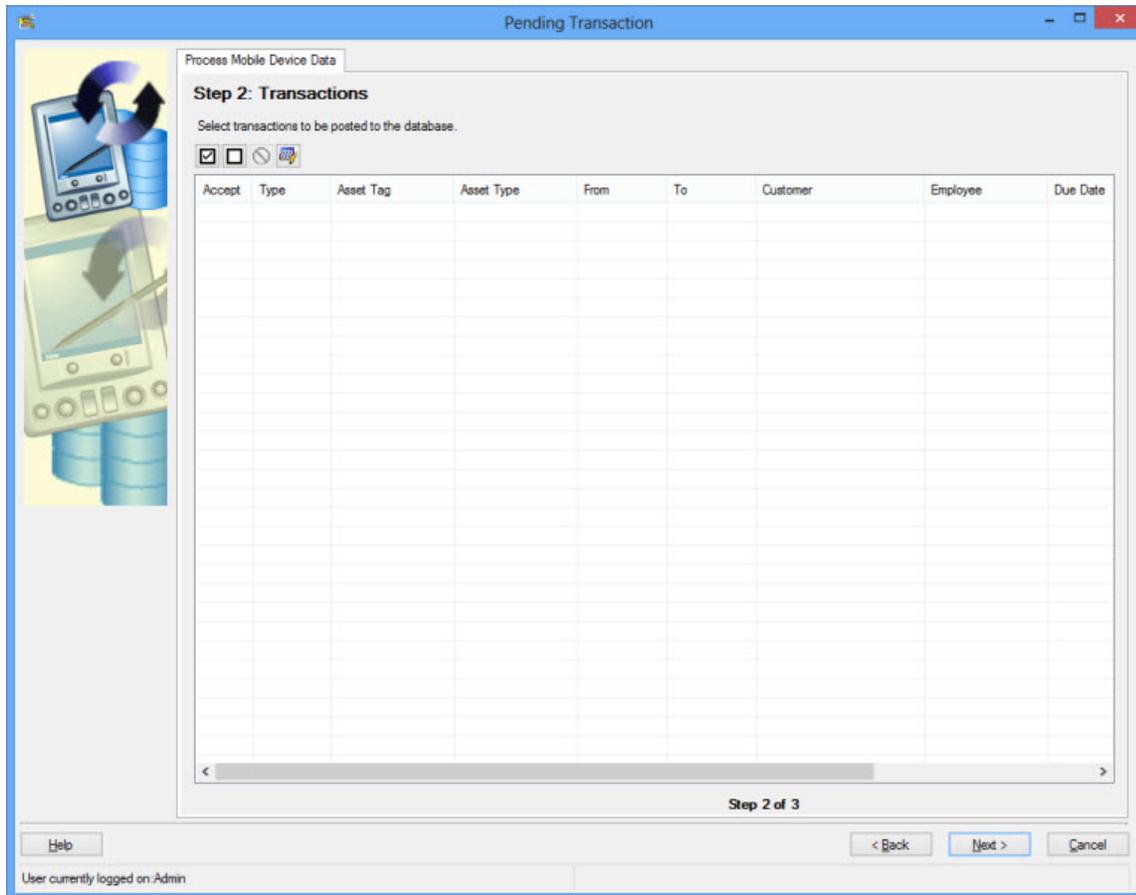
You can accept or reject each of the new additions by clicking the check box or double-clicking the record itself to toggle its selection status (between accepted and not accepted). If the new data was created in error, you can also assign an existing value to take its place:

The **New Records** toolbar contains the following functions:

- Select all transactions in the list for **Acceptance**.
- De-Select transactions in the list.
- Assign an existing value instead of creating a new record



- Click **Next >** to continue to the **Transactions** screen. This screen displays all transactions (moves, check-ins, check-outs, audits)



- Just as with the **New Records** screen, mark the transactions you wish to accept by clicking the checkbox or double-clicking the record itself. Each transaction completed on the mobile device is listed. Any  errors or  warnings are marked and you are allowed to accept or reject transactions or make changes to fix errors.

The **Transactions toolbar** has the following functions:

- Select all transactions in the list for Acceptance.
- De-select transactions in the list.
-  Display Error (or Warning) associated with the highlighted record.
 - The Error  or Warning  message associated with the selected transaction will be displayed. Click **Close** to return to the Pending Transaction screen.
 -  Records that have been previously processed will be marked with an Error  flag.
 -  The Display Error toolbar button will be  grayed-out when no record with an Error  or Warning  symbol is highlighted.



Edit Transactions allows you to make changes to the values specified at the mobile device. The following example shows an **Edit** for the above **Move** transaction:

The screenshot shows a dialog box titled "Edit Transactions" with a close button in the top right corner. The dialog contains the following fields and values:

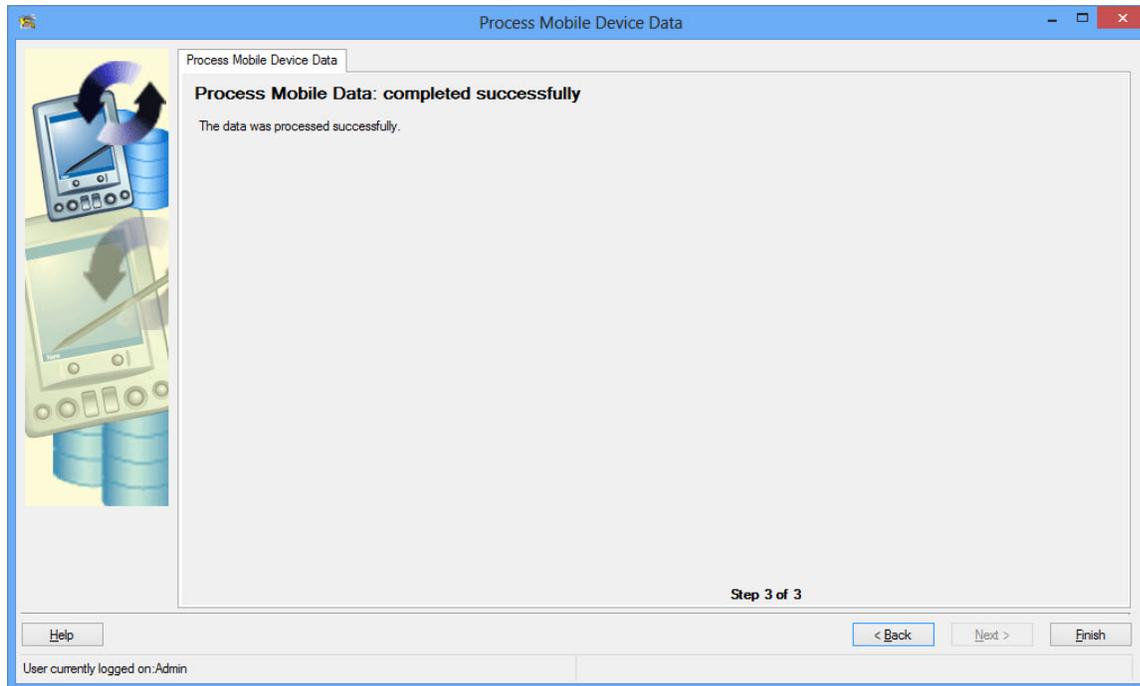
- Trans Type: Move
- Asset Tag: 123
- Location: 001, 002
- To Location: 001, 002
- Customer: (empty)
- Employee: (empty)
- Trans Date: Saturday, May 20, 2006
- Reason: (empty)
- Item Number: (empty)
- Serial Number: (empty)

At the bottom of the dialog are three buttons: "Help", "OK", and "Cancel".



Click **OK** to save any changes or **Cancel** to return to the Pending Transactions screen without saving changes.

- Click **Next >** after you have selected which transactions to accept. The system will post the accepted transactions to the MobileAsset database:



8. Click **Finish** to close the **Process Mobile Device Data** screen.

3.3 Specify Mobile Device Data Filters

The **Specify Mobile Device Data Filters** screen allows you to specify filter options that determine which database records will be used when the database is downloaded to the mobile device (WMD, iOS or Android) during a **Full Sync**.

Filtering your data can make the time it takes to transfer data to the mobile device considerably less.

[New Filter](#)
[Duplicate Filter](#)
[Delete Filter](#)

3.3.1 New Filter

1. To access this screen, from the **Main** screen select **Mobility > Specify Mobile Device Data Filters**. The following screen appears:

Specify filters for a subset of the MobileAsset data. These filters will then be used to generate the mobile database which will be loaded onto the mobile device. The performance of the portable device is improved by sending down only the data you need for impending tasks.

Filters:

Specify Filter:

Filter Name:

Asset:

Site: Location:

Asset Type: Category:

Department: No. of Matching Assets: 0

Location:

Site: Location:

Others:

Customer: All None

Employee: All None

MFG: All Minimally Required

Vendor: All Minimally Required

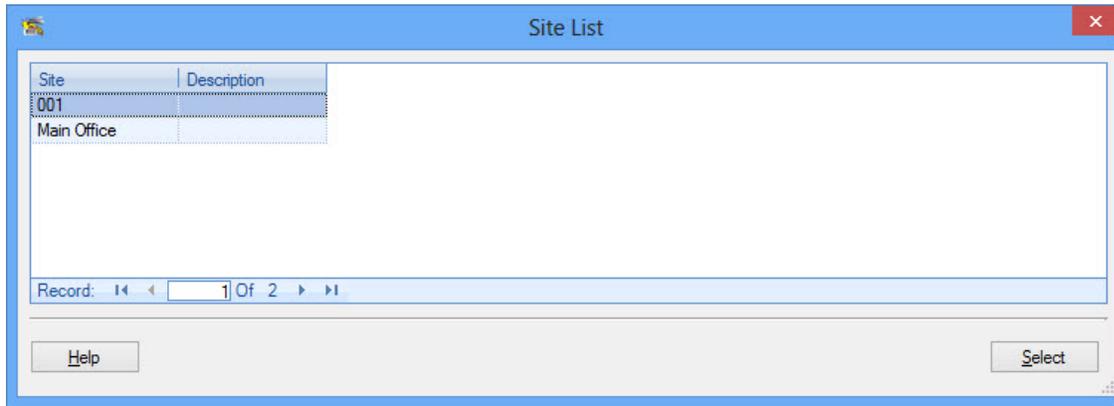
Department: All Minimally Required

- Click the New button in the bottom, right corner of the screen. The fields become enabled:

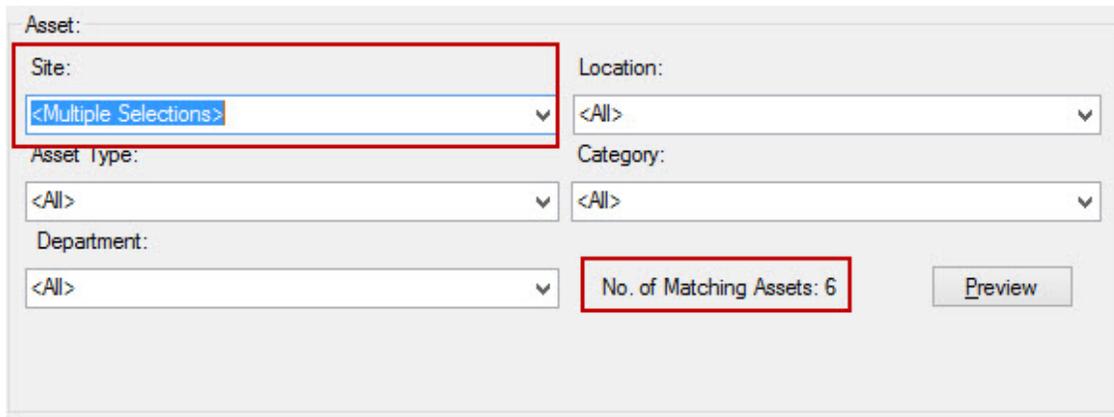
- Enter a name for this filter in the **Filter Name** field.

To filter any of the record types listed, make a selection from the **Site**, **Location**, **Asset Type**, **Category** and/or **Department** drop down lists. You can make multiple selections for each record type. Click the down arrow in the list, then select **Multiple Selections** to access the **List** screen.

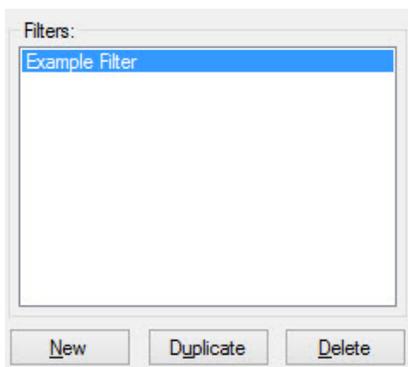
The **List** screen for the record type appears. In this example, the **Site List** screen would appear:



Choose one or more **Sites** from the list by highlighting them and clicking the **Select** button. The **Mobile Data Filters** screen will display **Multiple Selections** in the field if you choose more than one item from the list. The number of assets matching your filter criteria will display to the right of the selection fields. You can preview the assets by clicking the **Preview** button. The **Asset List** appears displaying the filtered assets



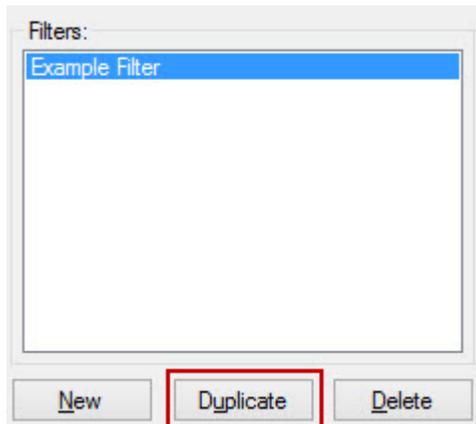
4. Continuing making selections as needed in the asset section. Make your selections from the drop down lists.
5. When **Minimally Required** is selected for Departments or Vendors, only those Departments or Vendors that are associated with the selected Assets are added to the database you are creating.
6. When you are satisfied with the filter selections, click **Save**. The new filter will be added to the Filters list.



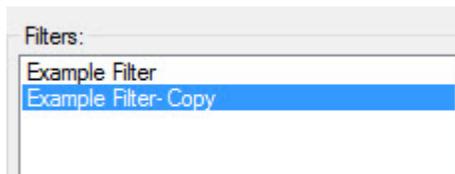
5. Click **Close** to close the **Mobile Data Filters** screen when you are done.

3.3.2 Duplicate a Filter

To duplicate a filter, highlight a filter in the **Filters** list, then click the **Duplicate** button.



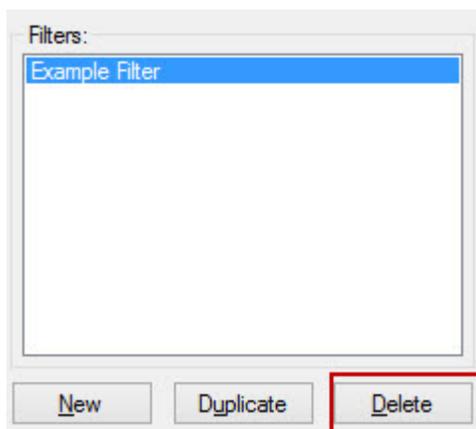
Another filter listing will appear in the list with the name <filter name> - copy.



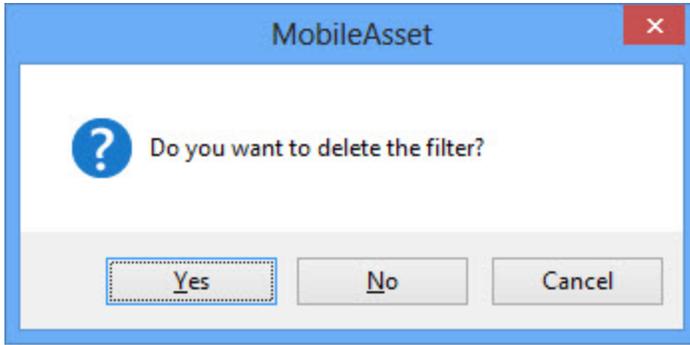
Make any changes as needed, then click the **Save** button.

3.3.3 Delete Filter

To delete a filter, highlight a filter in the **Filters** list, then click the **Delete** button.



A confirmation screen will appear.



Click **Yes** on the confirmation screen to delete the filter.

3.4 Windows Mobile/CE Operation

3.4.1 Windows Mobile / CE Similarity

If you are using a **Windows CE** device, please refer to the **Windows Mobile/CE** help topics.

MobileAsset functions identically on devices using Microsoft's Mobile 2003® or Windows CE® (Compact Edition) Operating Systems. There is one cosmetic difference to note: The Menu Bar is located at the top of the screen on Windows CE devices. Many of the images shown in this Help file were taken from an emulation of the HC1, where the Menu Bar is located at the bottom of the screen.

3.4.2 Professional and Enterprise Editions - Installing MobileAsset on Windows Mobile/CE

Note: Pro and Enterprise users can also install using the method described in the topic [Standard Edition - Installing MobileAsset on the Mobile Device](#). Keep in mind that downloading and installing using the method for the Standard edition requires the mobile device to be physically connected to the computer.

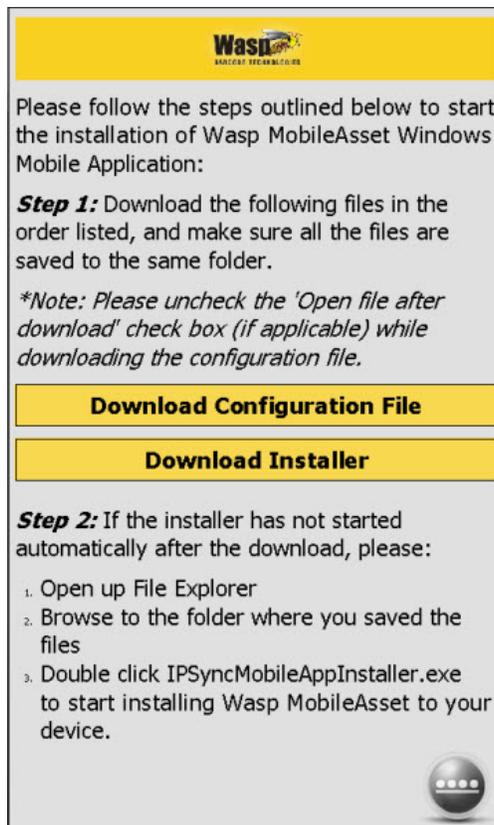
The instructions below pertain to the Professional and Enterprise Editions of MobileAsset. Standard Edition users should refer to the topic [Standard Edition - Installing MobileAsset on the Mobile Device](#).

Downloading and Installing MobileAsset (Wireless):

1. **Download the MobileAsset Install Files** - To download the files, follow the instructions below:
 - a. On the mobile device, access Internet Explorer. In the URL field, type in **http://<your IP address>:10006**. The download screen will appear providing instructions and link to the **Configuration Files** and the **Installation Program**.

The **Configuration File** and the **Installer** must be downloaded to the same folder on the mobile device. By default these are downloaded to **My Documents**. If you change the default download location make sure you are still downloading to the same folder.

Below is an example of the download screen:

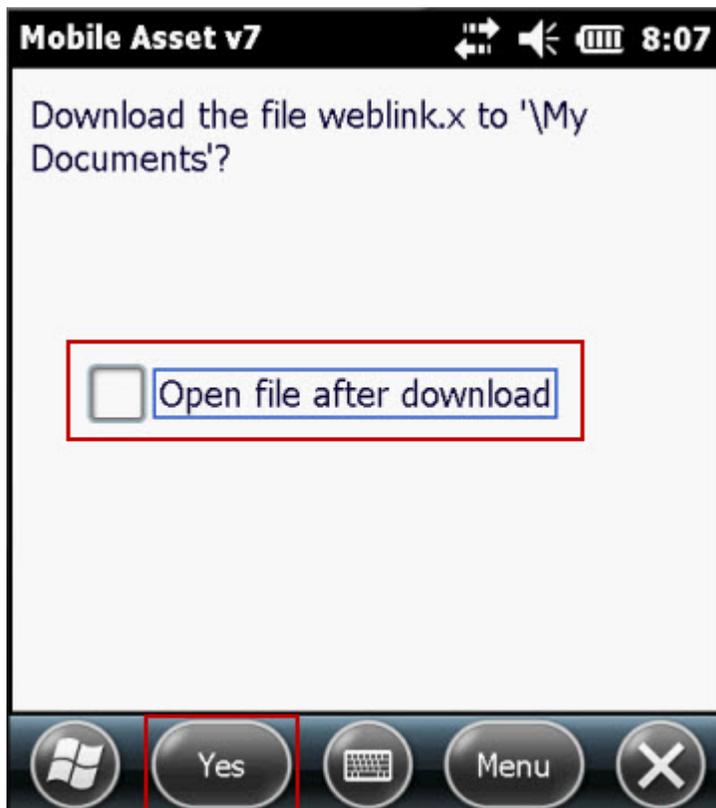


Instructions on obtaining your server's IP address:

1. On the server machine, select the **Start** (Windows icon) key on your keyboard. **CMD.exe** will appear in the **Programs** section. (In Win8 select the **CMD** icon from the toolbar.
2. Select cmd.exe from the **Programs** section of the **Start** menu. The **CMD** screen appears.
3. On the **CMD** screen, enter **IPCONFIG/all** at the prompt. Configuration information for the machine will appear on the screen.

The IP address is the **Host Name**.

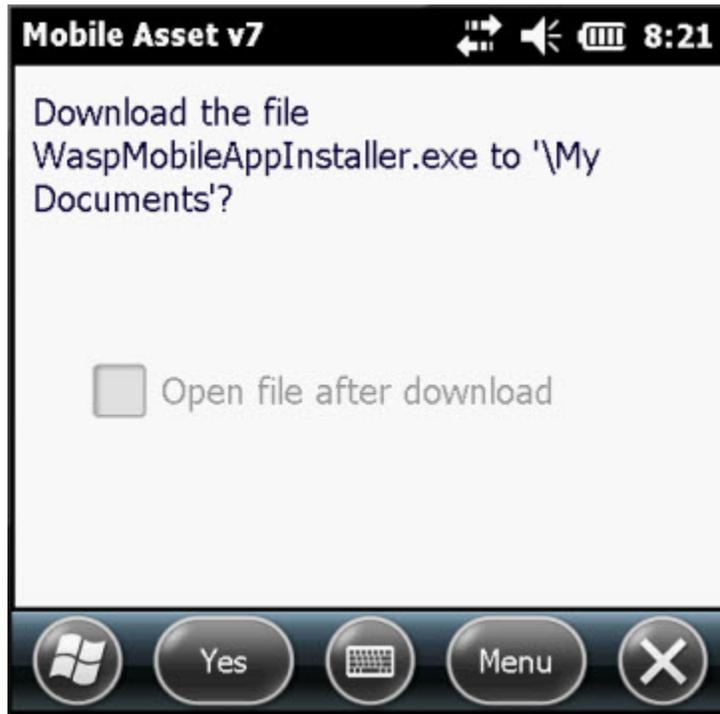
- b. Tap on the **Configuration Files** link to download the files. After you click the link, a screen may appear indicating the file will be opened after download. Make sure the **Open file after download** checkbox is **UNCHECKED** (you do not want to automatically open the file after download).



Tap the **Yes** button at the bottom of the screen to download the files.

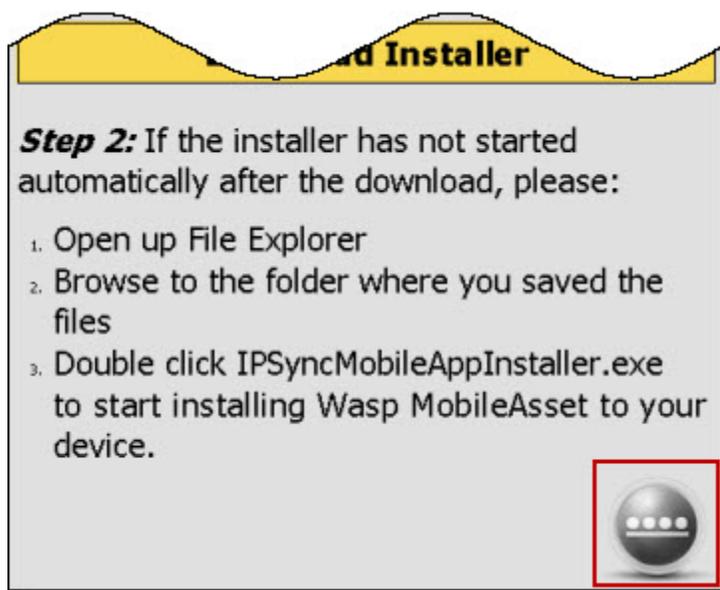
You will be returned to the download page seen in step 2.

- c. Tap the **Download Installer** link. The following screen appears:

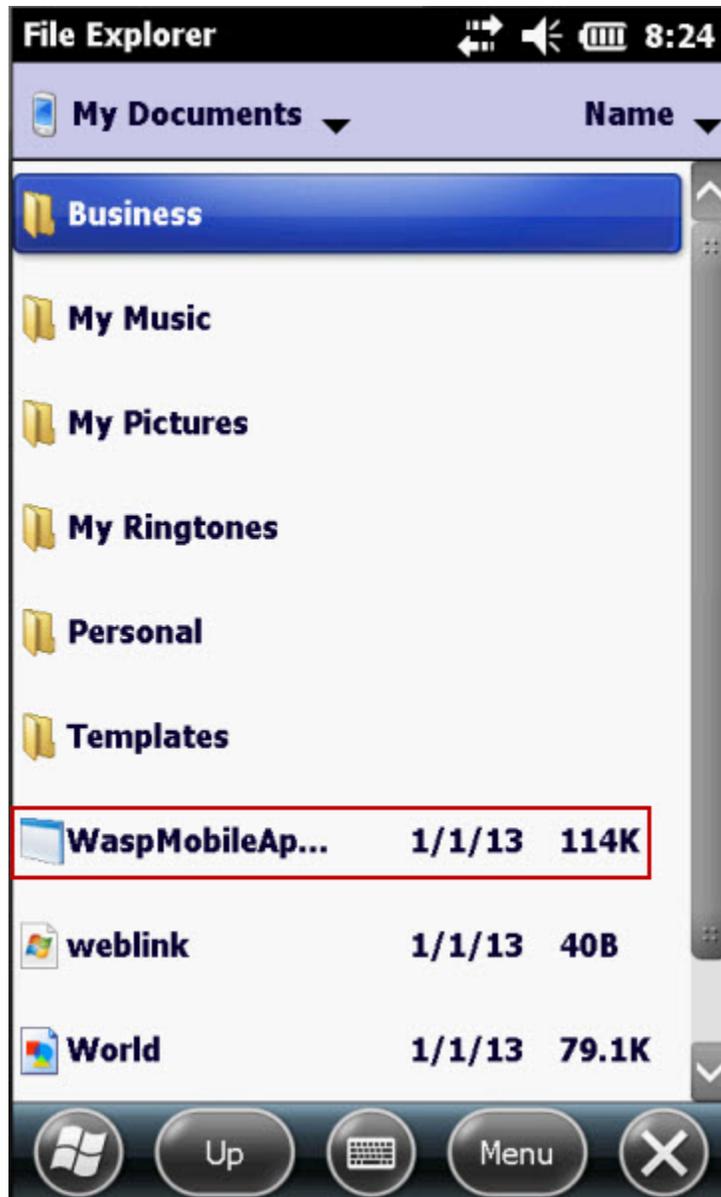


Tap the **Yes** button at the bottom of the screen. You will be returned to the **Download** screen seen in Step 1.

Tap the circle icon in the bottom, left corner of the screen to close the **Download** screen.



2. **Install Programs** - After downloading to the mobile device, you can install the MobileAsset program.
 - a. The **Installer** may automatically start. If it does not, browse to **My Documents** and click **WaspMobileAppInstaller.exe** to run it.



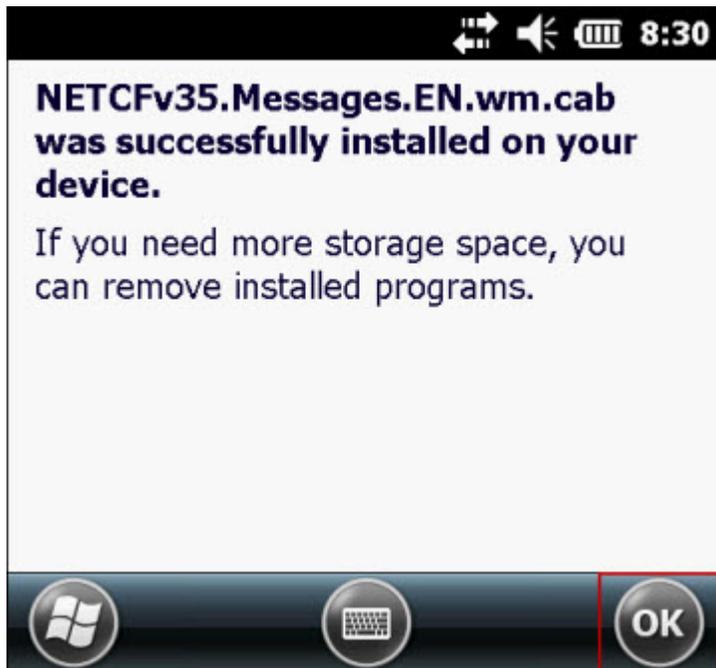
- b. After the installer opens, click **Start**.



- c. A screen will appear asking if you want to install to the device or Flash Storage. Do not install to Flash storage. Select **Device**, then tap the **Install** button.



- d. A confirmation screen will appear as the files are successfully installed.



Click **OK** to continue.

- e. Repeat steps c and d as needed to complete the install. Watch your mobile device screen for prompts.
- f. MobileAsset will automatically open at the **Log in** screen.

3. Log in to MobileAsset -

Professional and Enterprise Edition: The first time you log in to MobileAsset you will need to make sure the Service URL is correct, enter your device name, user name and password. Below is an example of the **Log in** screen. When you are done entering information, tap **OK**.

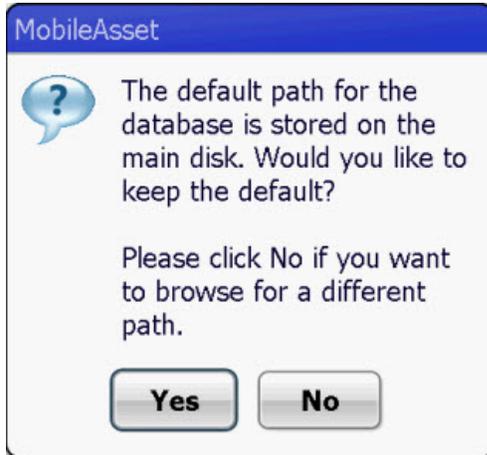
The screenshot shows the MobileAsset login interface. At the top, the status bar displays 'MobileAsset' and system icons. The main heading is 'Log into MobileAsset'. The 'Service Url' field is highlighted in grey and contains the text 'http://10.1.7.58:10008'. Below it are three empty text input fields for 'Device Name', 'User Name', and 'Password'. At the bottom of the form are two buttons: 'OK' and 'Exit'. In the bottom left corner, the text reads 'Version: 7.00' and 'Build: 4.16.2014.245'.

- **Service URL** - This field auto populates based on the IP or FQDN (Fully Qualified Domain Name) detected when you installed MobileAsset on your PC. The **Service URL** is the IP or FQDN followed by the port number for MobileAsset, usually 10008. The **Service URL** is pinned by default. If you need to modify the Service URL, you can unpin it by tapping on the grey field name. This will unpin the field allowing you to edit the URL information.
- **Device Name** - Enter a unique name here for this mobile device.

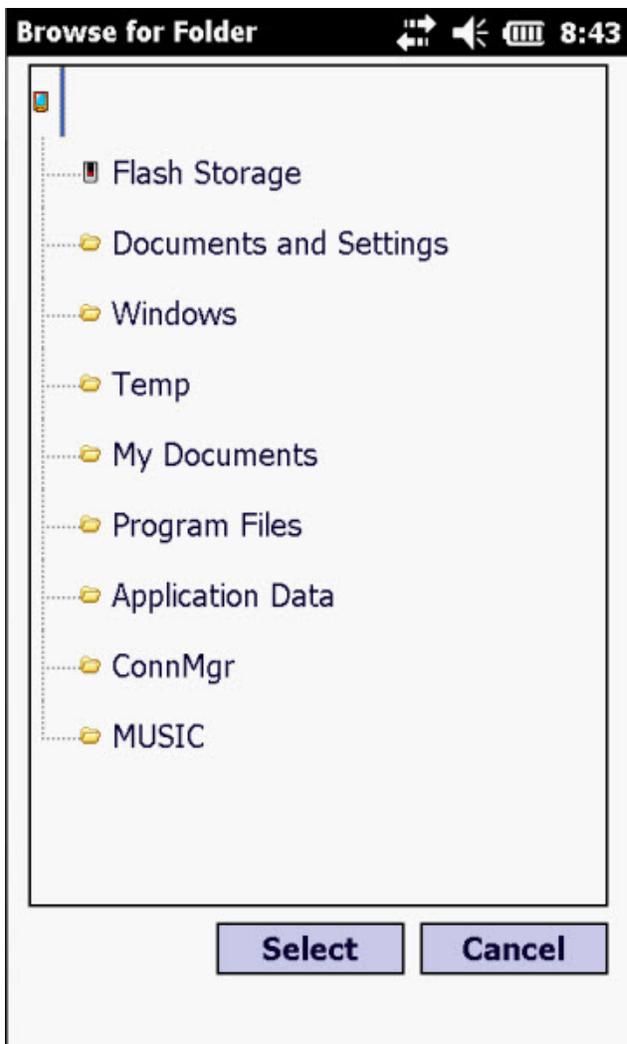
If this device has previously been setup on MobileAsset with a different Device Name, a message will appear. Click **Yes** to use the previous name, click **No** to change the device name.

- **User Name** - Enter your MobileAsset user name.
- **Password** - Enter your MobileAsset password.

- Next the following message appears.



This message allows you to change the default pathway for the database, if needed. The default pathway is **Program Files/MobileAsset/database**. Tap **Yes** to accept the default path. If you need to change it, because there is not enough room on your mobile device, for example, tap **No**. The following **Browse** screen appears:



Browse to a new location, then tap **Select**.

5. **Specify Filters** - You can filter the data that is sent from the MobileAsset database on this screen. Select the filter, or no filter, then tap **Download**. You can change the filter later, if needed, on the [Tools](#) screen.

Note: Filters are setup from **Mobility** > [Specify Mobile Device Data Filters](#) screen on the PC.

6. **Time Discrepancy** - This screen may appear if MobileAsset detects a discrepancy between the time set on the MobileAsset server and the time set on this device. **You should adjust the time on your device to match the server before you start performing transactions on your device.** Click **OK** on this screen to close it.

The [Mobile Asset Main Menu](#) will appear.

7. **Upload Mobile Device to PC** -

Professional and Enterprise Edition with a Wireless Connection:

The mobile device transmits data to the database in almost real time whenever you are connected wirelessly and have the [Auto Upload](#) option turned on. When you leave a transaction and return to the **Main Menu**, any new data will be uploaded to the database.

Professional and Enterprise Edition with No Wireless Connection:

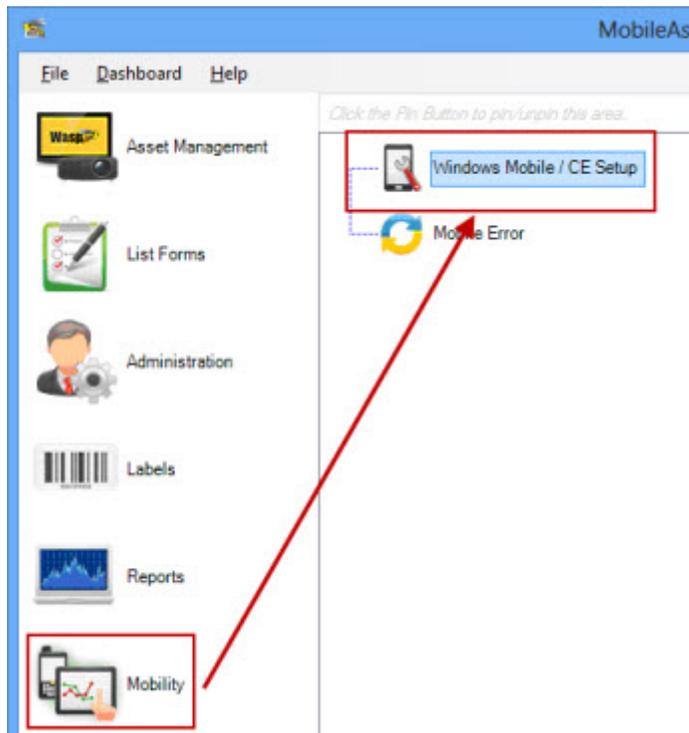
If your device does not have wifi capabilities, you can perform transactions as usual on the mobile device, then connect your device to your computer (the computer must have ActiveSync installed on it) and initiate a [Manual Upload](#) to the database.

Notes: If you need to download the MobileAsset database from the PC again, you can do so from the [Tools](#) menu.

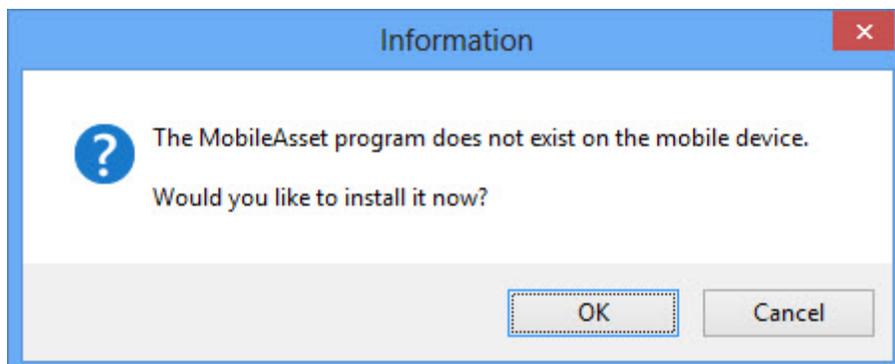
If at any time you accidentally close MobileAsset on the mobile device, wait 5-10 seconds before trying to reopen it to avoid getting an error message.

3.4.3 Standard Edition - Installing MobileAsset on the Mobile Device

1. Connect your MobileDevice to the PC which has MobileAsset installed on it. (Microsoft ActiveSync must be installed on this PC.)
2. In MobileAsset, select **Mobility > Windows Mobile/CE Setup**.

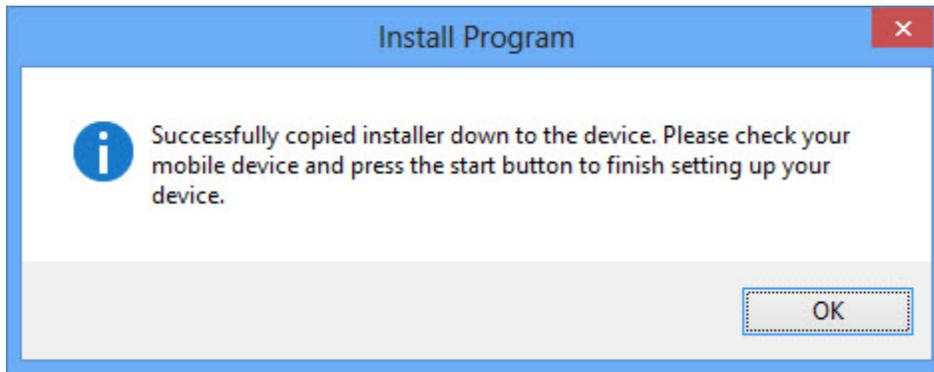


3. If this application detects that MobileAsset is not yet installed on the mobile device, the following message appears:



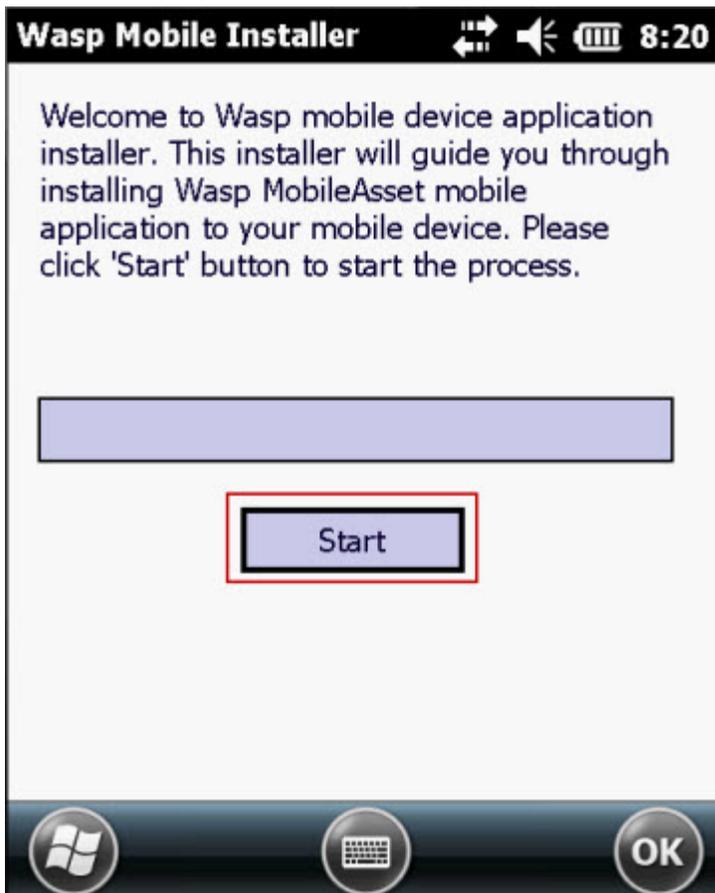
Click **OK** on this screen to proceed.

- When the installer file is copied to your mobile device, the following screen appears:



Click **OK** on this screen to close it.

- On your mobile device, you should see this screen:

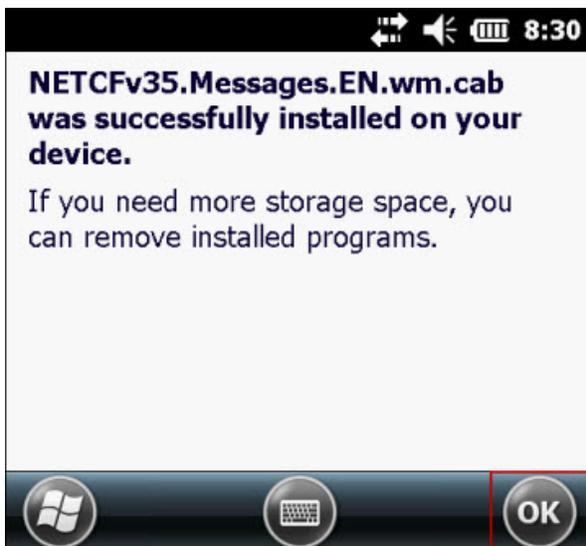


Click the **Start** button.

- A screen will appear asking if you want to install to the device or Flash Storage. Do not install to Flash storage. Select **Device**, then tap the **Install** button.



- A confirmation screen will appear as the files are successfully installed.



Click **OK** to continue.

8. Repeat steps 6 and 7 as needed to complete the install. Watch your mobile device screen for prompts.

Log in to MobileAsset -

The first time you log in to MobileAsset the Service URL will appear. You should not change this address. Enter your device name and your MobileAsset user name and password. Below is an example of the **Log in** screen. When you are done entering information, tap **OK**.

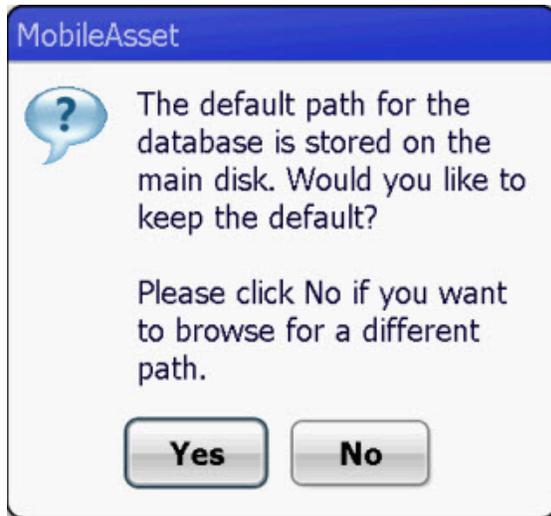
The screenshot shows a mobile application interface for logging into MobileAsset. At the top, there is a status bar with the text 'MobileAsset' on the left and icons for signal strength, volume, battery, and the time '8:37' on the right. Below the status bar, the main heading is 'Log into MobileAsset'. There are four input fields: 'Service Url' (containing 'http://10.1.7.58:10008'), 'Device Name', 'User Name', and 'Password'. Below the fields are 'OK' and 'Exit' buttons. At the bottom, it shows 'Version: 7.00' and 'Build: 4.16.2014.245'.

- **Service URL** - This field auto populates based on the IP or FQDN (Fully Qualified Domain Name) detected when you installed MobileAsset on your PC. The **Service URL** is the IP or FQDN followed by the port number for MobileAsset, usually 10008. The **Service URL** is pinned by default. If you need to modify the Service URL, you can unpin it by tapping on the grey field name. This will unpin the field allowing you to edit the URL information. Editing the URL is not recommended unless told to do so by Wasp Support.
- **Device Name** - Enter a unique name here for this mobile device.

If this device has previously been setup on MobileAsset with a different Device Name, a message will appear. Click **Yes** to use the previous name, click **No** to change the device name.

- **User Name** - Enter your MobileAsset user name.
- **Password** - Enter your MobileAsset password.

9. Next the following message appears.



This message allows you to change the default pathway for the database, if needed. The default pathway is **Program Files/MobileAsset/database**. Tap **Yes** to accept the default path. If you need to change it, because there is not enough room on your mobile device, for example, tap **No**. The following **Browse** screen appears:



Browse to a new location, then tap **Select**.

10. **Time Discrepancy** - This screen may appear if MobileAsset detects a discrepancy between the time set on the MobileAsset server and the time set on this device. **You should adjust the time on your device to match the server before you start performing transactions on your device.** Click **OK** on this screen to close it.

The [Mobile Asset Main Menu](#) will appear.

11. Upload Mobile Device to PC -

Perform transactions as usual on the mobile device, then connect your device to your computer (your computer must have ActiveSync installed on it) and initiate a [Manual Upload](#) to the database.

12. **Notes:** If you need to download the MobileAsset database from the PC again, you can do so from the [Tools](#) menu.
13. If at any time you accidentally close MobileAsset on the mobile device, wait 5-10 seconds before trying to reopen it to avoid getting an error message.

3.4.4 Using the Windows Mobile/CE Device

Windows Mobile CE/Interface

Once **Setup** has been completed, the device will be ready for conducting asset management operations:



Tap the Windows Mobile/CE **MobileAsset** icon or use **Start > Programs > Asset** to start the application.

When the Asset application has finished loading, you will be presented with the Log On prompt.

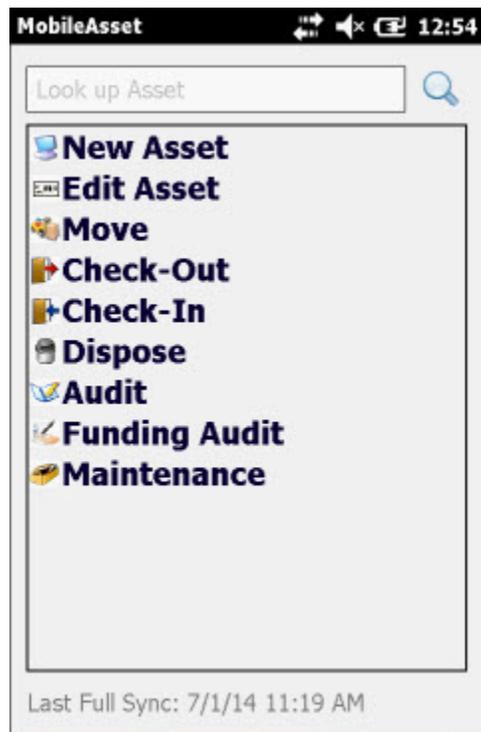
Both fields must be supplied with valid values before tapping **OK**.

The **User Name** field is not case sensitive. The **Password** field is case sensitive.

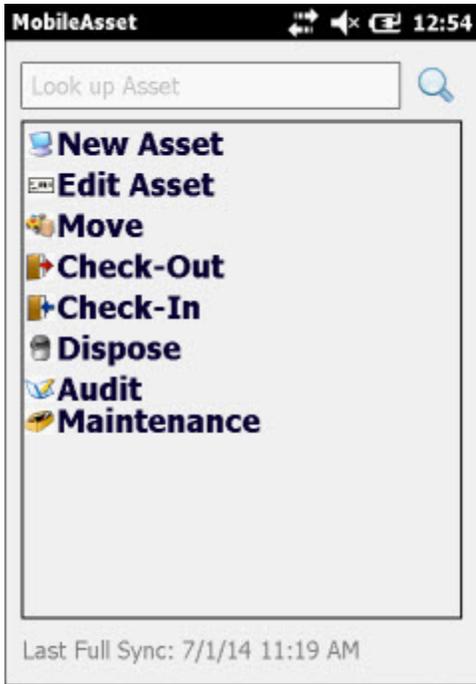
- Asterisks will be displayed as you type the Password.
- MobileAsset opens with the following default settings on the PC. These same values will be valid on the Windows Mobile/CE device if you have not yet created any additional users on the PC:
- User Name: Admin
- Password: (blank)
- The Asset Admin account, or any other account with the Administration Privilege, can use the [Manage Users](#) screen (on the PC) to add Users and set their privileges, and reset their passwords.

Tap **OK** after entering this information. The MobileAsset main menu will be displayed:

Professional and Enterprise Editions:



Standard Edition:



- References will be made in this document to the Windows Mobile/CE device's built-in bar code scanner. Not all devices have an integrated bar code scanner and although a scanner can significantly increase data entry speed and accuracy, it is not required.

3.4.5 Windows Mobile/CE New Asset

The **New Asset** transaction is used to create a new asset.

[Adding New Assets](#)

[Searching for Sites, Locations and/or Asset Types](#)

[Creating New Asset Types](#)

Adding New Assets

1. To create a new asset, from the **Main** menu, tap **New Asset**. The **New Asset** screen appears:

The Linking tab will only appear if you are using the Professional or Enterprise editions of MobileAsset.

Note: If you are using the HC1 device and want to show the keyboard for data entry, tap the very bottom of the screen.

2. Enter the **Site**, **Location**, **Asset Tag** and **Asset Type** and, optionally, a **Serial #**, then tap **OK** to save the transaction and reset the screen. The **Description** field will display the description for the selected asset.

Asset Tag: Asset Tags must be unique across all Sites and Locations. A particular value can occur only once

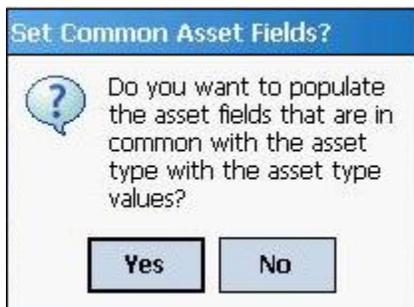
in the MobileAsset database.

Sites: You must enter an existing site in the Site field. New Sites cannot be created on the mobile device. They must be created on the PC prior to creating the Windows Mobile/CE device database.

A Note on Sites: If only one site exists in the Windows Mobile/CE device's database, the **Site** field will default to that site. If the database contains multiple sites, the Site field will be blank for the first transaction after starting MobileAsset and all subsequent transactions will default to the last Site used.

If the Site you need is not in the Windows Mobile/CE device's Asset database, tap **Cancel** (and then **Close**) to exit the New Asset function completely. To add a new site to the database, you will have to first create the new site on the PC.

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



Select **Yes** to populate fields with information from the **Asset Type**. For example, if **Check Out Length** information is entered for the **Asset Type**, it will appear on the **Type** tab.

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. These fields include the Manufacturer, Model, Vendor Number, Check Out Length, Check Out Lead Time and Reminder Lead Time. Any changes made to these fields apply to the current asset only.

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

Pinning allows you to lock the value entered in a field for use as a constant in subsequent iterations of the same transaction. In the following example, values for Site and Location were selected, then both fields were pinned by tapping their labels. Note that they now appear in grey boxes and the search symbol is no longer displayed to the right of the input field.

To pin a field, click on the field label. Pinned fields appear grey. In the example below, the Asset Type and Description fields are pinned.

Input for the pinned fields is now locked and multiple **Add New Asset** transactions can be performed by supplying only the Asset Tag, Asset Type, and Serial # if necessary. Any input field can be pinned to suit the data entry task at hand (where permitted).

See the [Definitions](#) topic for further descriptions of Site, Location, Asset Tag, Asset Type and Serial Number.

New Locations or Asset Types can be created at will by entering the new value directly on the screen shown above. A popup will ask if you want to create the new value. Tap **Yes** to confirm. Tap **No** if you do not want to create the new Location or Asset Type. See **Creating New Asset Types** later in this topic for further information on adding Asset Types.

3. **If you are using the Professional or Enterprise editions of MobileAsset** you can create links to other assets by tapping the **Linking** tab at the bottom of the screen.

Asset Linking 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.](#)

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

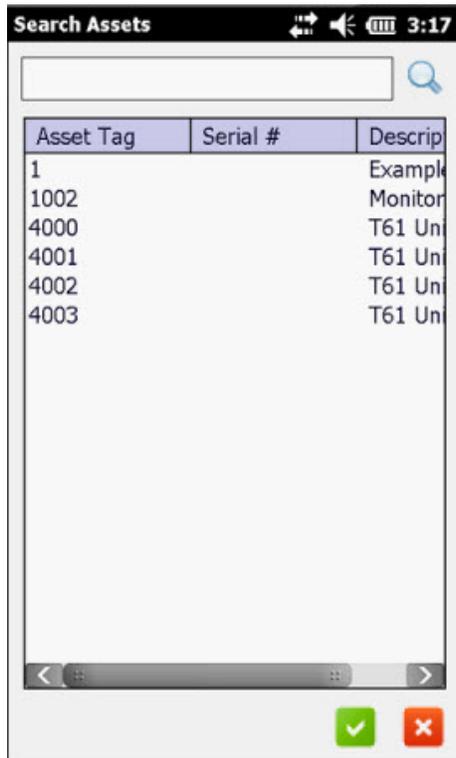
The **Asset Tag** field will display the tag you entered on the **General** tab.

Click the **Transact as Whole** checkbox if you want functions (check in, check out, move, audit, etc.) to be performed on this group as a whole on the PC.

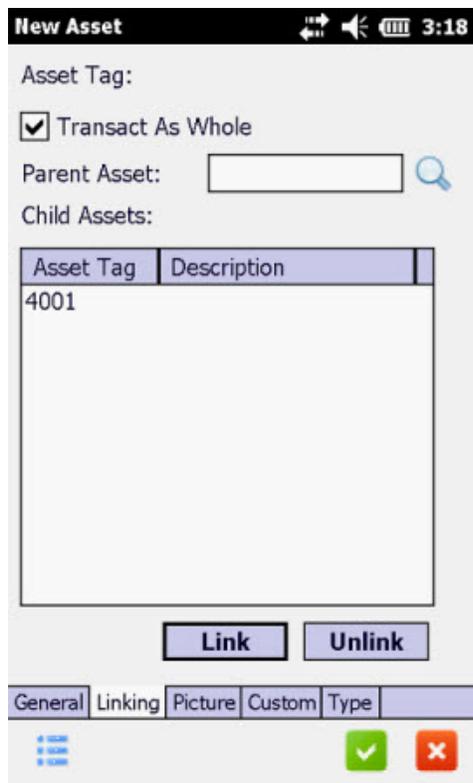
Parent Asset: If this asset is to be the Parent, or top-level asset, of this group, you can leave the **Parent** field blank. If you want to give this asset a parent (for instance, if this asset is a monitor and you want to link it to the asset *Mary's Computer*), enter an asset here or click the magnifying glass icon button to search for an asset.

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

Child Assets: To associate child assets with this asset (the current asset will be the "parent" of these assets), tap the **Link** button. A screen similar to the one below will appear:



Highlight an asset and tap **Link**, or type in a value and tap **Find** to search for an asset. After you tap **Link**, the selected asset will appear on the **Linking** tab as shown below:

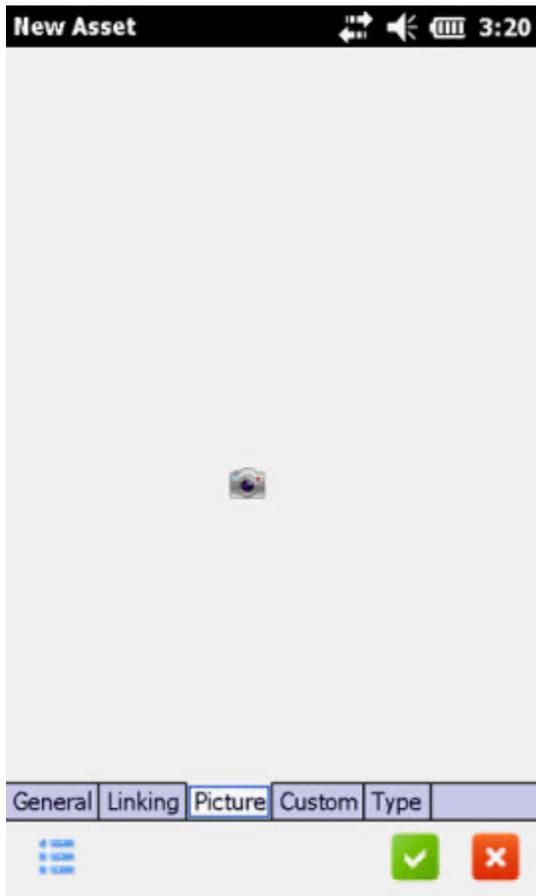


In this example, Asset 4001 is a child of the current asset.

You can unlink an asset by highlighting it in the **Child Assets** window and tapping **Unlink**.

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 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 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.

4. You can optionally take a picture of this asset using the **Picture** tab. To do this, tap **Picture** at the bottom of the screen. The **Picture** tab appears.

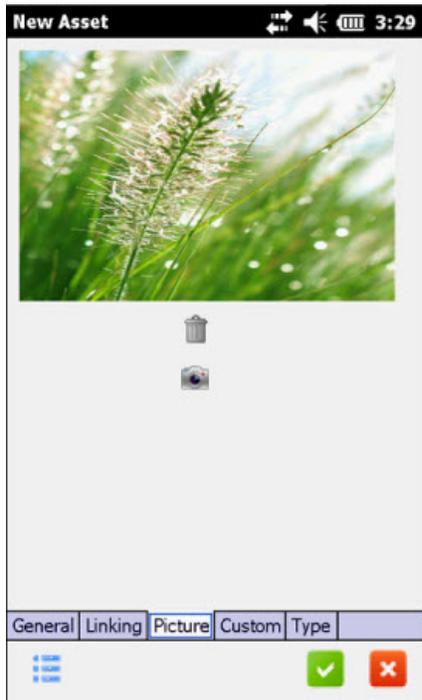


Tap on the **Camera** icon in the center of the screen, then select **Camera** or **Browse**.



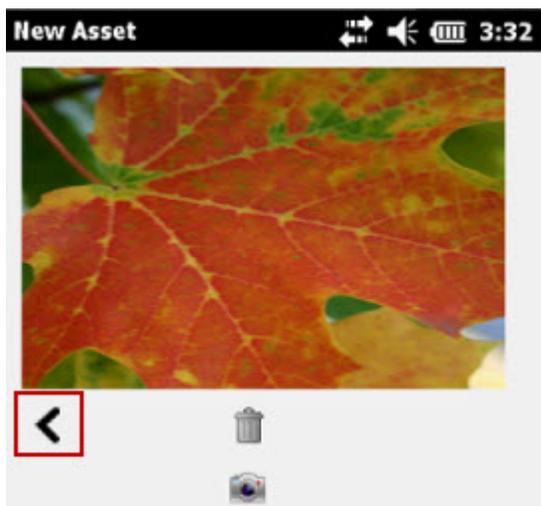
To take a new picture, tap **Camera**. This will activate your mobile device's camera feature. Follow the usual procedure for capturing an image using your device. Please refer to your device manual for information specific to the device. Keep in mind that after you select the ENTER key to take the picture, you must tap OK on the device screen to accept it. Images captured via MobileAsset are not saved to your mobile device.

To browse for an existing picture, tap **Browse**. Navigate to the image on your camera and select it. If your device is connected to the PC, you can browse all images that are already in MobileAsset on the PC as well. The selected image will appear on the **Picture** tab.



Click the **Camera** icon again to take or retrieve another picture. You can capture as many images as allowed in [Options > Maximum Pictures Captured](#).

If you have captured more than one image for an asset, you can scroll through the images using the arrow icons.



You can delete the image by clicking the **Trash** icon.

5. The **Custom** tab contains any Custom fields create for the asset on the PC. These fields may be required, depending on the settings on the PC.

6. Below is an example of a **Custom** tab:

To add custom text, highlight a field in the list, then type in a value. For dates, you can click the down arrow and choose a date from the calendar.

There may be dynamic custom fields that appear here as well. These are create on the Asset Type using the PC application. For more information on Dynamic Custom fields, please refer to the help topic [Using Dynamic Custom Fields](#).

7. The **Type** tab contains information about the Asset Type such as depreciation and check out length. If the [Edit Inherited Asset Type Data](#) option is turned on, some of these fields may not be editable. This tab is divided into two sections: **Type** and **Check Out**.

8. The **Type** section is shown below:

The screenshot shows a mobile application interface for creating a new asset. At the top, it says 'New Asset' with a back arrow, a speaker icon, and a battery icon showing 3:48. Below this are five input fields: 'Depr. Class:', 'Category:', 'Manufacturer:', 'Model #:', and 'Vendor:'. The 'Manufacturer:' and 'Vendor:' fields have magnifying glass icons to the right. At the bottom, there is a 'Type' dropdown menu currently set to 'Check Out'. Below the dropdown is a navigation bar with tabs for 'General', 'Linking', 'Picture', 'Custom', and 'Type'. The 'Type' tab is highlighted. At the very bottom, there are three icons: a blue back arrow, a green checkmark, and a red 'X'.

You can search for or add new **Manufacturers** or **Vendors** if needed.

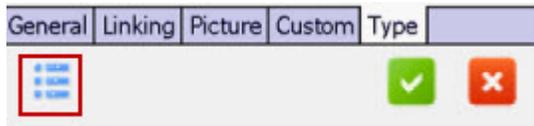
The **Check Out** section is shown below:

This screenshot shows the 'Check Out Length' and 'Lead Time' sections of the 'New Asset' form. The 'Check Out Length' section has three input fields for 'Day(s)', 'Hour(s)', and 'Minute(s)', each containing the number '0'. The 'Lead Time' section also has three input fields for 'Day(s)', 'Hour(s)', and 'Minute(s)', each containing the number '0'. The 'Type' dropdown is still set to 'Check Out'. The bottom navigation bar and icons are the same as in the previous screenshot.

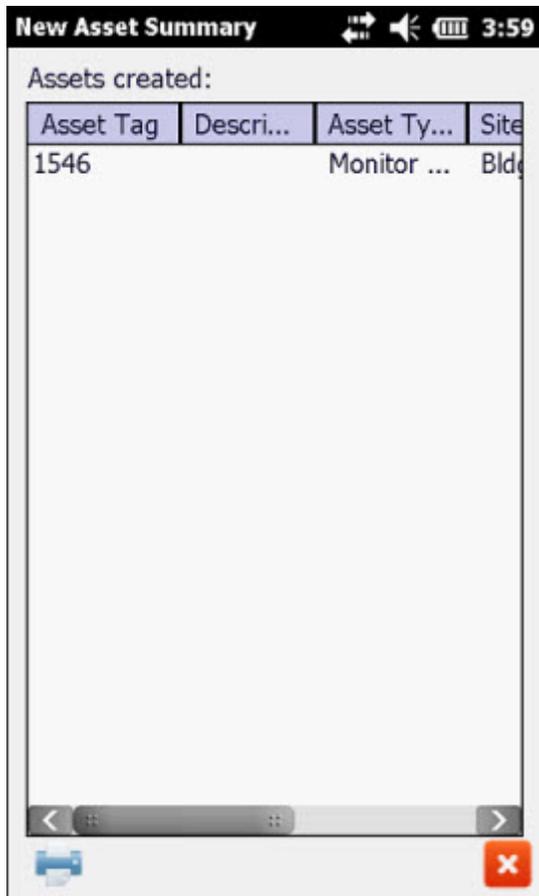
You can optionally enter a **Check Out Length** and **Lead Time** for this asset.

- To complete the new asset, tap the green arrow icon at the bottom of the screen button.

Note: While you are creating new assets, you can view/print a list of the new assets you have created this session. To do this, click the **Summary** button at the bottom of the screen.



The **Summary** screen appears:



To print any labels appearing on the Summary screen, click the Print icon at the bottom, left of the screen.

Searching for Sites, Locations and/or Asset Types

- If you want to search for an existing Site, Location, Asset Type, Department, etc., tap the Magnifying Glass icon next to the field you want to search. If the field does not have a Magnifying Glass icon next to it, it is not a searchable field.

A list of Sites, Locations, Asset Types, etc. appears from which you can select a value. The following screen displays a search for an **Asset Type**:



2. Select an **Asset Type** from the drop down list or enter a value for **Asset Type** and tap the Magnifying Glass button to search for an existing **Asset Type**. You can enter a partial value and the system will return all Asset Types that begin with those characters.

You can also search for an Asset Type by serial number. This is useful if your company uses full or partial serial numbers as Asset Tags.

3. Highlight the desired listing, then tap **OK** to return to the New Asset screen. Click **New** to create a new Asset Type.

The **Search Asset Type** and **Search Site** screens behave identically to the **Search Location** screen with the exception of the **New** button. You cannot create new sites on the mobile device.

Creating a New Asset Type

You can create a new **Asset Type** by typing in an unknown value in the **Asset Type** field or by tapping **Green Plus** icon on the **Search Asset Type** screen.



Below is an example of the **New Asset Type** screen:

The following fields can be completed on this screen:

- **Asset Type** - The asset type is a category for assets and is required to create new asset types. 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.
- **Asset Type Description** - Enter a description for this Asset Type.
- **Depr Class** and **Category** are optional fields. A selection can be made from any previously defined values found in the drop down lists or you can create a new Class or Category by tapping <New> in the drop down menu.

MobileAsset can perform depreciation calculations at the PC for any Depreciation Class assigned to asset types for which that option has been enabled. The Windows Mobile/CE device does not distinguish those Depreciation Classes for which depreciation has been enabled from those where it has not. If you define a new Depreciation Class on the Windows Mobile/CE for which depreciation should be calculated, the option will have to be enabled for that Depreciation Class. [Click here for information on enabling depreciation.](#)

- **Manufacturer** - Scan a manufacturer or tap the Magnifying Glass icon to search manufacturers. You can create a new manufacturer by clicking the green plus sign icon at the bottom of the search screen.

- **Vendor** - Scan a manufacturer or tap the Magnifying Glass icon to search manufacturers. You can create a new manufacturer by clicking the green plus sign icon at the bottom of the search screen.
- **CO Length** - The check out default number of Days the asset type may remain checked out before it is overdue. When a specific Asset Tag (having this Asset Type) is actually Checked Out , a specific Due Date and Due Time can be specified (overriding the default duration you specified here.)
- **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.

Click the green check mark icon to save the new Asset Type.

3.4.6 Windows Mobile/CE Edit

The **Edit Asset** transaction is used to modify an existing Asset.

1. To edit an asset, from the **Main** menu, tap **Edit**. The **Edit** screen appears:

2. You can select an asset to edit by locating it by Asset Tag or by Site and Location. If you already know the Asset Tag value or want to scan it, tap the **Asset Tag** check box. If you don't know the Asset Tag and want to specify a Site and Location to search, tap the **Site and Location** check box. By default, the screen will open with **Asset Tag** selected.

Click the Magnifying Glass icon to access the **Asset Tag** search screen, shown below:

You can search by full or partial Asset Tag or Serial Number.

After you see the asset you want to edit in the list (or have manually entered the Asset Tag or scanned it), highlight it, then click the **Pencil** icon. The **Edit Asset** screen will appear populated with the selected asset's information.

The screenshot shows the 'Edit Asset' screen with the following fields and values:

- Asset Tag: 1002
- Asset Type: Monitor 17" (with a magnifying glass icon)
- Description: Monitor 17"
- Site: Main Office (with a magnifying glass icon)
- Location: Storage Rm A (with a magnifying glass icon)
- Serial #: (empty)
- Department: GR (with a magnifying glass icon)
- Condition: (dropdown menu)

At the bottom, there are tabs for 'General', 'Linking', 'Picture', 'Custom', and 'Type'. Below the tabs are three icons: a printer, a green checkmark, and a red 'X'.

- Only the **Asset Tag**, **Asset Type**, **Site**, **Location**, **Serial #**, **Department** and **Condition** can be edited on the **General** tab. Tap an Magnifying Glass icon to search for an **Asset Type**, **Site**, or **Location**.

Tap any of the tabs to edit information on those tabs. For detailed information about each tab, please refer to the topic [Windows Mobile/CE Add New](#).

Note: If you are using the HC1 device and want to show the keyboard for data entry, click the very bottom of the screen.

- Tap the green check mark icon when you have made your changes.

3.4.7 Windows Mobile/CE Move

The **Move Asset** transaction is used to change the location of an Asset.

1. To move an asset, from the **Main** menu, tap **Move**. The **Move** screen will appear:

2. The **Move** function requires entry of a **To Site**, **To Location**, and **Asset Tag**:

Select a **To Site** first. You can scan or type in a To Site, or you can click the Magnifying Glass icon to access the Site Search screen.

3. Select a **To Location**, to indicate where the Asset will be relocated. You can scan or type in a To Location, or you can click the Magnifying Glass icon to access the Location Search screen.
4. Select an **Asset Tag**, by entering it manually or scanning it, or you can click the Magnifying Glass icon to access the Asset Tag Search screen.

The **Description**, **From Site** and **From Location** fields will be displayed when a value is entered for the **Asset Tag** that is being moved.

5. Tap the green check mark icon to record the **Move** transaction.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen >

Linking tab) 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 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 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.

3.4.8 Windows Mobile/CE Check Out

The **Check Out Asset** transaction provides the ability to check-out assets to a customer or employee, specifying a Due Date and Due Time by which the asset should be checked-in.

You have two options for checking out assets, **Advanced** and **Quick**.

Advanced check out allows you to check out a number assets to an employee or customer, then view the **Summary** screen where you can collect a signature and/or print a receipt.

Quick check out can be used when you have many assets you want to check out to different customers/employees without worrying about gathering signatures on each one. This mode allows you to select a customer or employee and check out the asset without having to collect signatures or view the summary screen for each transaction.

Note: Quick check out is not available if the [Require a Signature on Device is set to Yes on the Options screen](#).

[Advanced Check Out](#)

[Quick Check Out](#)

Advanced Check Out

1. To check-out assets, from the **Main** menu, tap **Check Out**. If this is the first time you have accessed the Check Out function, a pop up menu will appear asking if you want **Advanced** or **Quick** check out. Select **Advanced**. The **Advanced Check Out** screen appears:

Note: The popup menu does not automatically appear on subsequent taps. To change from Quick check out to Advanced check out or vice-versa, press and hold the Check Out menu option. The pop up menu will appear asking if you want Advanced or Quick check out.

- You can check the asset out to a customer or an employee by scanning in an id number or selecting from the drop down menu. The drop down menu defaults to **Customer**. Click on the drop down list if you would prefer to use an **Employee #** instead. You can search for a Customer or Employee by selecting from the drop down, then clicking the Magnifying Glass icon to access the appropriate search screen.

A screenshot of a mobile application form. It features a dropdown menu with three options: 'Customer #:', 'Customer #:', and 'Employee #:'. The first two options are highlighted in blue, and the third is highlighted in red. Below the dropdown are three input fields: 'Description:', a purple-shaded field, and 'Site:'. Each input field has a magnifying glass icon to its right.

You can search for a customer or employee by selecting from the drop down, then clicking the Magnifying Glass icon to access the appropriate search screen. Below is an example of the **Customer Search** screen.

A screenshot of the 'Search Customers' screen. At the top, there is a search bar with a magnifying glass icon. Below the search bar is a table with two columns: 'Customer #' and 'Customer Name'. The table contains two rows of data: 'DO342 Ann Dolly' and 'HU2013 John Huffman'. At the bottom of the screen, there are three icons: a green plus sign, a green check mark, and a red X.

Customer #	Customer Name
DO342	Ann Dolly
HU2013	John Huffman

Tap on a customer/employee to select him or her.

Keep in mind that you can create a new customer or employee from the **Customer** and **Employee Search** screens by clicking the green plus sign from the bottom of the screen.

Tap the green check mark icon to return to the check out function when a customer or employee has been selected.

- Enter an Asset Tag or search for one using the Magnifying Glass icon. The screen will populate with the asset's information.

Advanced Check-Out 3:20

Customer #: D0342

Asset Tag: 4003

Description: T61 Units

Site: Main Office

Location: Storage Rm A

Due Date: Use CO Length
No Due Date

Reservation:

+ ✓ ✗

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

- The **Due Date** will default to **Use CO Length**, if a check out length was set for this asset type. The default can be accepted or overwritten if necessary. To change the Due Date, use the drop down menu to change the setting.

Due Date: Custom

Date:

Time:

Due Date options are:

Use CO Length - This uses the check out duration set for the asset type. The Date and Time will be calculated and displayed.

No Due Date - This means the asset will not have a due date set.

Custom - Use this option to set a new due date and time. When this option is selected, the Date and Time fields appear:

Click the down arrow button to access the calendar to select a new due date. The default date is today.

Use the up and down arrows to modify the time. The default time is the current time.

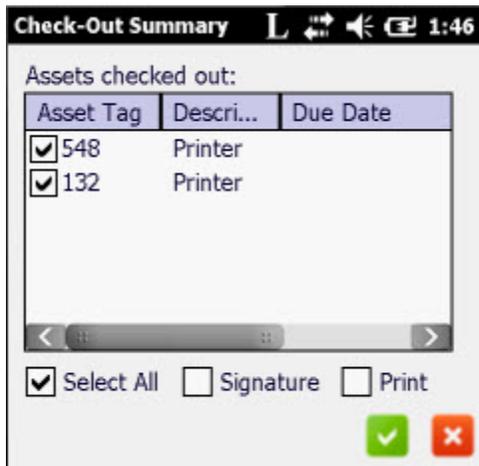
- The **Site** and **Location** default to the **Site** and **Location** assigned to this asset. You can change these if needed. Make sure that if you change the site, you also change the location to one within that site.
- (MobileAsset Web Users Only)** If a **Reservation** has been created for this asset on MobileAsset Web, the **Reservation** field (shown below) will appear on the Check Out screen.

The **Reservation** field displays a drop down list of reservations to which the current asset is tied. Select the reservation from the drop down list for which you want to check out this asset. If you are creating a reservation for the same period for a customer other than the one listed in the reservation, you will receive a warning message.

Tap **OK** on the warning message to continue checking out the asset despite the overlapping period, or click **No** to cancel the check out process.

When you sync the data back to the PC, MobileAsset Web will be updated with the new check out information. The status of the selected reservation will be updated to completed.

- Tap the green plus sign icon to check the asset out to the customer or employee. Non-pinned fields will clear allowing you to check out another asset; however, the Customer/Employee field will remain pinned until you are finished checking out assets for this session and click the green checkmark icon (see step 8). Please note that at this point, the transaction is still in a "pending" state. The transaction is not finalized until you complete step 8.
- When you are finished checking out assets for this session, click the green checkmark icon. The **Summary** screen appears.



This screen lists all assets checked out during this session and allows you to collect a signature and/or print a receipt of the transaction(s).

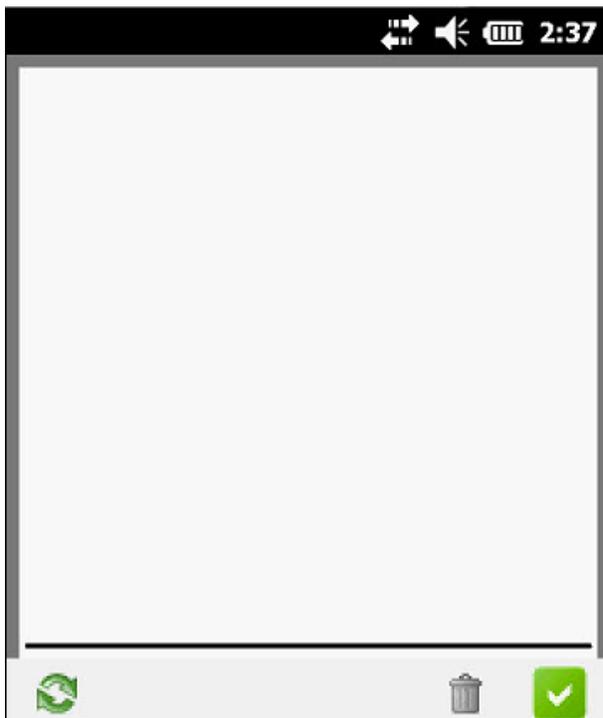
If you want to print the summary screen, make sure the checkboxes in front of the transaction and in front of the **Print** option are selected on the **Summary** screen.

If you want to collect a signature for all or some of these transactions, make sure the checkboxes in front of the transaction and in front of the **Signature** option are selected on the **Summary** screen.

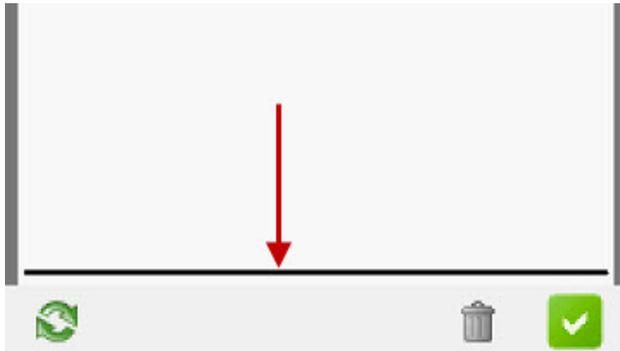
Note: Depending on the MobileAsset PC options, you may be prompted to obtain a signature or a signature may be required.

Tap the green checkmark icon.

The **Signature Capture** screen appears.



Whoever is signing in this asset(s) can use the stylus to sign in the **Capture** window. The thick black line indicates the orientation of the capture page.



You can change the orientation of the Capture window using the circle icon at the bottom of the screen.



If you want to delete the signature after the user signs, tap the trash can icon. To save the signature, tap the green check mark icon. Saving a signature ends the check in session.

The signature is saved on the mobile device until the next data upload to the PC. Once it is uploaded to the PC, you can view it by going to the **Transactions List (Main > List Forms > Transactions)** highlighting the desired transaction and clicking the **Signature** button. Only those transactions with a Pen icon next to them contain signature captures.

Transaction List

Tools

Filter Toggle Print Export Group Hidden Views **Signature** Reprint Receipt

	Trans Date	Trans Type	Asset Tag	Department	Location	Site
	4/9/2014	Check In	4003	IT	Storage Rm A	Main Office
	4/9/2014	Check In	1546	GR	Shf6 Bin7	Bldg 2
	4/9/2014	Check In	4000	IT	Storage Rm A	Main Office
	4/9/2014	Check In	1002	GR	Storage Rm A	Main Office
	4/9/2014	Check In	1		Sh1b2	001
	4/9/2014	Check Out	1002	GR	Storage Rm A	Main Office
	4/9/2014	Check Out	4003	IT	Storage Rm A	Main Office
	4/9/2014	Check In	4001	IT	Storage Rm A	Main Office
	4/9/2014	Check Out	4001	IT	Storage Rm A	Main Office
	4/9/2014	Check In	4000	IT	Storage Rm A	Main Office
	4/9/2014	Check In	1002			Main Office

When the **Signature** button is clicked, the **View Signature** screen appears.



Click the Red X in the upper, right corner to close the **View Signature** screen.

You can re-print the check out receipt by highlighting the check out transaction, then clicking the **Reprint Receipt** button.

Quick Check Out

1. From the **Main** menu, tap **Check Out**. If this is the first time you have accessed the Check Out function, a pop up menu will appear asking if you want **Advanced** or **Quick** check out. Select **Quick**. The **Check Out** screen appears:

Note: The popup menu does not automatically appear on subsequent taps. To change from Quick check out to Advanced check out or vice-versa, press and hold the Check Out menu option. The pop up menu will appear asking if you want Advanced or Quick check out.

- You can check the asset out to a customer or an employee by scanning in an id number or selecting from the drop down menu. The drop down menu defaults to **Customer**. Click on the drop down list if you would prefer to use an **Employee #** instead. You can search for a Customer or Employee by selecting from the drop down, then clicking the Magnifying Glass icon to access the appropriate search screen.

You can search for a customer or employee by selecting from the drop down, then clicking the Magnifying Glass icon to access the appropriate search screen. Below is an example of the **Customer Search** screen.

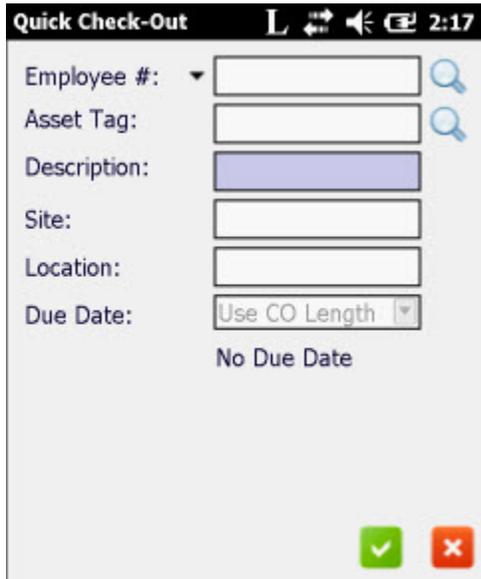
Customer #	Customer Name
DO342	Ann Dolly
HU2013	John Huffman

Tap on a customer/employee to select him or her.

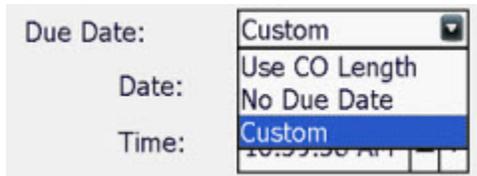
Keep in mind that you can create a new customer or employee from the **Customer** and **Employee Search** screens by clicking the green plus sign from the bottom of the screen.

Tap the green check mark icon to return to the check out function when a customer or employee has been selected.

3. Enter an Asset Tag or search for one using the Magnifying Glass icon. The screen will populate with the asset's information.



4. The **Due Date** will default to **Use CO Length**, if a check out length was set for this asset type. The default can be accepted or overwritten if necessary. To change the Due Date, use the drop down menu to change the setting.

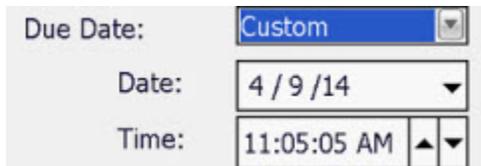


Due Date options are:

Use CO Length - This uses the check out duration set for the asset type. The Date and Time will be calculated and displayed.

No Due Date - This means the asset will not have a due date set.

Custom - Use this option to set a new due date and time. When this option is selected, the Date and Time fields appear:



Click the down arrow button to access the calendar to select a new due date. The default date is today.

Use the up and down arrows to modify the time. The default time is the current time.

5. The **Site** and **Location** default to the **Site** and **Location** assigned to this asset. These values cannot be changed while in **Quick Check Out** mode.
6. Tap the green checkmark when all information has been entered. The fields will clear allowing you to check out another asset.

3.4.9 Windows Mobile/CE Check In

The **Check In Asset** transaction provides the ability to check in assets currently checked out to a customer or employee.

You have two options for checking in assets, **Advanced** and **Quick**.

Advanced check in allows you to check in a number assets from an employee or customer, then view the **Summary** screen where you can collect a signature and/or print a receipt.

Quick check in can be used when you have many assets you want to check in from different customers or employees without worrying about gathering signatures on each one. This mode allows you to select a customer or employee and check in the asset without having to collect signatures or view the summary screen for each transaction.

[Advanced Check In](#)
[Quick Check In](#)

Advanced Check In

1. To check in assets, from the **Main** menu, tap **Check In**. If this is the first time you have accessed the Check In function, a pop up menu will appear asking if you want **Advanced** or **Quick** check in. Select **Advanced**. The **Advanced Check In** screen appears:

Note: To change from **Advanced** check in to **Quick** check in, press and hold the **Check In** menu option. The pop up menu will appear asking if you want **Advanced** or **Quick** check in.

2. Entry of an **Asset Tag** is required. The value can be scanned in, searched for by tapping the Magnifying Glass icon or entered manually.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole**

flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

- The Site and Location values will default to the location from which the asset was checked-out, but they can be changed if you want to move the asset to a different Location at the same time you are checking it in. Select Magnifying Glass icon to access the Search screens for Site or Location.

The screenshot shows the 'Check-In' screen with the following fields and values:

- Asset Tag: 4001
- Description: T61 Units
- Site: Main Office
- Location: Storage Rm A

Below the fields is a table titled 'Assets checked in:' with two columns: 'Asset Tag' and 'Description'. The table is currently empty.

- Tap the green check mark icon at the bottom of the screen to check in the asset. The asset will appear in the Assets checked in list as shown below:

The screenshot shows the 'Check-In' screen after the asset has been checked in. The 'Assets checked in:' table now contains one entry:

Asset Tag	Description
<input checked="" type="checkbox"/> 457	Printer

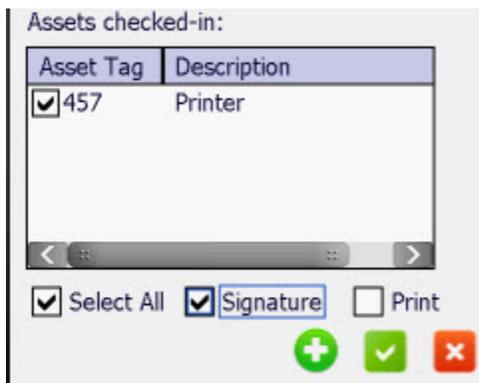
At the bottom of the screen, there are three checkboxes: Select All, Signature, and Print. Below these are three icons: a green plus sign, a green check mark, and a red X.

Continue checking in assets as needed.

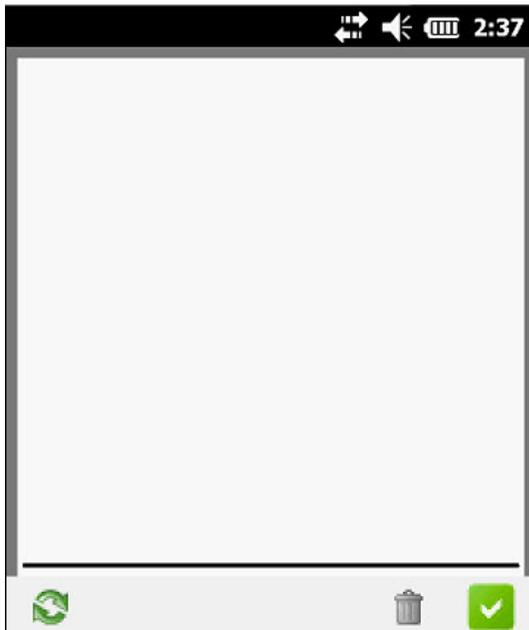
- After you are done checking in assets, you can add a signature capture. Depending on the MobileAsset PC options, you may be prompted to obtain a signature or a signature may be required.

If you want to print a receipt, make sure the checkboxes in front of the transaction and the **Print** checkbox are selected, then tap the green checkmark icon.

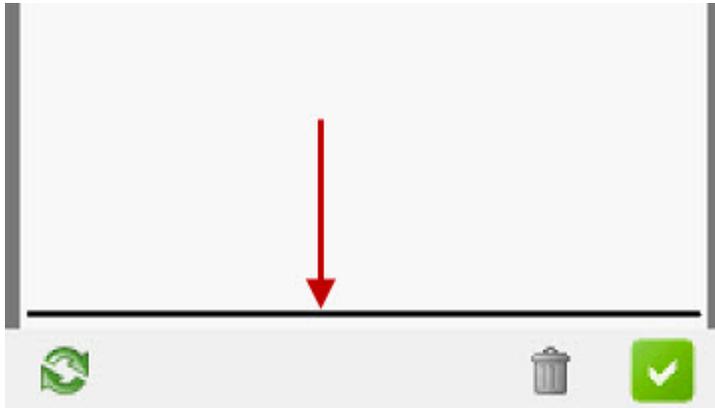
To add a signature to all or some of the assets in the checked in list, make sure the checkbox in front of the assets are selected (or the Select All checkbox is selected, if you want to collect a signature for all assets in the list) and select the Signature checkbox. Tap the green checkmark icon.



The **Signature Capture** screen appears.



Whoever is signing in this asset(s) can use the stylus to sign in the **Capture** window. The thick black line indicates the orientation of the capture page.



You can change the orientation of the **Capture** window using the circle icon at the bottom of the screen.



If you want to delete the signature after the user signs, tap the trash can icon. To save the signature, tap the green check mark icon. Saving a signature ends the check in session.

The signature is saved on the mobile device until the next data upload to the PC. Once it is uploaded to the PC, you can view it by going to the **Transactions List (Main > List Forms > Transactions)** highlighting the desired transaction and clicking the **Signature** button. Only those transactions with a Pen icon next to them contain signature captures.

Transaction List						
Tools						
Filter	Toggle	Print	Export	Group	Hidden	Views
						Signature
						Reprint Receipt
Trans Date	Trans Type	Asset Tag	Department	Location	Site	
4/9/2014	Check In	4003	IT	Storage Rm A	Main Office	
4/9/2014	Check In	1546	GR	Shf6 Bin7	Bldg 2	
4/9/2014	Check In	4000	IT	Storage Rm A	Main Office	
4/9/2014	Check In	1002	GR	Storage Rm A	Main Office	
4/9/2014	Check In	1		Sh1b2	001	
4/9/2014	Check Out	1002	GR	Storage Rm A	Main Office	
4/9/2014	Check Out	4003	IT	Storage Rm A	Main Office	
4/9/2014	Check In	4001	IT	Storage Rm A	Main Office	
4/9/2014	Check Out	4001	IT	Storage Rm A	Main Office	
4/9/2014	Check In	4000	IT	Storage Rm A	Main Office	
4/9/2014	Check In	1002			Main Office	

When the **Signature** button is clicked, the **View Signature** screen appears.



Click the Red X in the upper, right corner to close the **View Signature** screen.

You can re-print the check in receipt by highlighting the check in transaction, then clicking the **Reprint Receipt** button.

6. Tap **Print** to print the list of Checked In assets to a supported mobile printer or **Close** to exit the Check In function.

MobileAsset allows mobile devices to check in assets that were not checked out at the time the database was created for the mobile device. Later, when [Process Mobile Device Data](#) is performed, any discrepancies can be reconciled.

Quick Check In

1. From the **Main** menu, tap **Check In**. If this is the first time you have accessed the Check In function, a pop up menu will appear asking if you want **Advanced** or **Quick** check in. Select **Quick**. The **Quick Check In** screen appears:

Note: To change from **Quick** check in to **Advanced** check in, press and hold the **Check In** menu option. The pop up menu will appear asking if you want **Advanced** or **Quick** check in.

2. Entry of an **Asset Tag** is required. The value can be scanned in, searched for by tapping the Magnifying Glass icon or entered manually.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

3. The Site and Location values will default to the location from which the asset was checked-out. These values cannot be changed while in **Quick Check In** mode.
4. Tap the green checkmark when all information has been entered. The fields will clear allowing you to check in another asset.

3.4.10 Windows Mobile/CE Audit

The **Audit Assets** transaction is used to update the Location of one or more Assets.

1. To audit assets, from the **Main** menu, tap **Audit**. The **Audit** screen appears:

2. Each Audit transaction begins by entering the **Site** and **Location** you are currently auditing. **Site** and **Location** values can be scanned in or entered manually. Click the Magnifying Glass icon to access the **Search** screen.
3. You can note the time the audit started by tapping the **Audit Start Time** button. This feature allows you to stop and restart an audit without auditing the same inventory twice by telling MobileAsset to only include those assets that were not audited prior to the entered start date and time. For example, if you begin an audit on April 8th, but had to stop at midnight and the audit was not completed, you can enter 4/9/2014 at 12am to being the new audit. This means that only items that have not been audited as of 12am on April 9th will be included in this audit.

The following screen will appear:

Click the down arrow next to the date to access the calendar.

Use the up and down arrows to set the time.

- When a **Site** and **Location** have been provided, MobileAsset displays the assets at that Location:

The screenshot shows the 'Audit' screen in MobileAsset. At the top, there's a status bar with 'Audit', signal strength, volume, battery, and time '3:23'. Below that are four input fields: 'Site' with 'Bldg 2', 'Location' with 'Sh15 bin3', 'Asset Tag' (empty), and 'Description' (empty). Each field has a magnifying glass icon to its right. Below the fields, it says '1 Assets not audited at location:'. Underneath is a table with three columns: 'Asset Tag', 'Description', and 'Serial #'. The table contains one row: '1002', 'Monitor 17\"', and an empty 'Serial #' cell. At the bottom of the screen, there's a navigation bar with a back arrow, a double-dot menu, and a forward arrow. Below the navigation bar are three buttons: 'Audit Start Time', a green checkmark icon, and a red X icon.

Asset Tag	Description	Serial #
1002	Monitor 17"	

- One at a time, audit each asset in the list by confirming its presence at that Location, then highlighting it in the list, and tapping the green check mark icon. You can manually input an Asset Tag value or scan it with the mobile device's barcode scanner. As each Asset is Audited, the number of **Assets not audited at location** will be reduced.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

6. When **0 Assets not audited at location** is displayed, you can begin Auditing any Assets you have found at that Location which Asset did not list.

For each Asset that Asset did not list, Search for it using the Magnifying Glass icon, scan it in, or directly enter the Asset Tag, then tap the green check mark icon. A message will appear notifying you that the asset is not at the specified location. You can either move the asset to this location and audit it, or mark it as audited in the location it is assigned to in MobileAsset. Keep in mind that whichever option you choose, the asset will be audited.

If you know that an Asset you have found should *not* reside at that Location, do not perform any transactions to rectify the misplacement. Just use the [Edit](#) asset screen to look up the Asset Tag's correct Location, then cancel out of the Edit transaction, and physically relocate the Asset to its correct Location - so that reality is made to conform with the database.

If an Asset is missing at the Location being Audited, you must perform a Dispose transaction to declare it missing.

3.4.11 Windows Mobile/CE Funding Audit

Professional and Enterprise Editions Only

The **Funding Audit** function allows you to audit those assets associated with a funding source.

1. From the **Main** screen, tap **Funding Audit**. The **Funding Audit** screen appears:

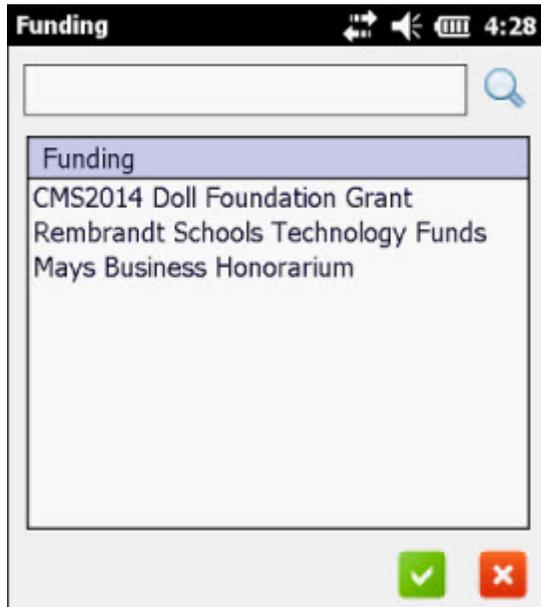
Site	Location	Count

2. You can enter the **Audit Time** or accept the default date/time (the default is the current date/time).

This feature allows you to stop and restart an audit without auditing the same inventory twice by telling MobileAsset to only include those assets that were not audited prior to the entered start date and time. For example, if you begin an audit on November 6, but had to stop at midnight and the audit was not completed, you can enter 11/7/2014 at 12am to being the new audit. This means that only items that have not been audited as of 12am on November 7 will be included in this audit.

Click the Magnifying Glass icon to see a full list of recent Audit Start times.

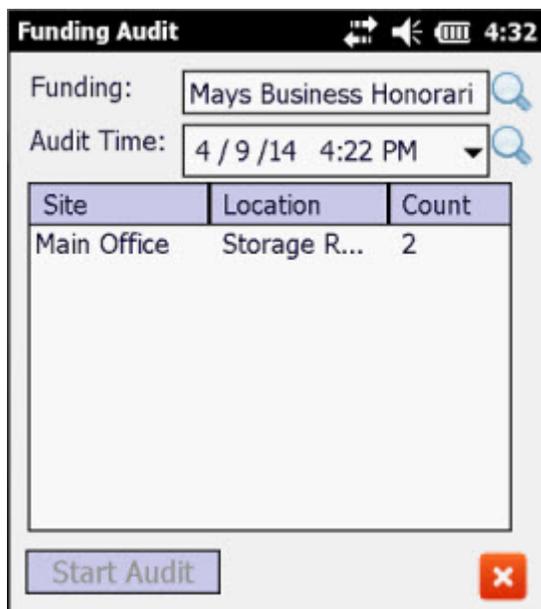
3. Enter a **Funding** source to audit by scanning or entering a fund or by clicking the Magnifying Glass to access the **Search** screen.



Enter a full or partial name/code in the search field, or leave it blank and click the **Search** icon. Results will appear in the **Funding** list.

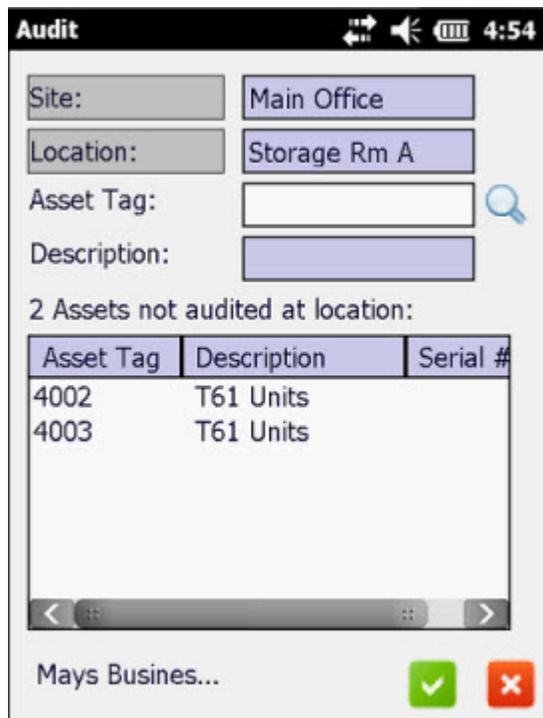
Highlight a **Funding** source in the list, then click the green check mark icon.

The selected **Funding** source will populate the **Funding Audit** screen.



After you select a **Funding** source, the screen will display a list of the sites and locations containing assets associated with the selected Funding.

4. Highlight a listing, then click the **Start Audit** button. The **Audit** screen will appear populated with your selection.



One at a time, audit each asset in the list by confirming its presence at that Location, then highlighting it in the list, and tapping the green check mark icon. You can manually input an Asset Tag value or scan it with the mobile device's barcode scanner. As each Asset is Audited, the number of **Assets not audited at location** will be reduced.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

- When **0 Assets not audited at location** is displayed, you can begin Auditing any Assets you have found at that Location which Asset did not list.

For each Asset that Asset did not list, Search for it using the Magnifying Glass icon, scan it in, or directly enter the Asset Tag, then tap the green check mark icon. A message will appear notifying you that the asset is not at the specified location. You can either move the asset to this location and audit it, or mark it as audited in the location it is assigned to in MobileAsset. Keep in mind that whichever option you choose, the asset will be audited.

If you know that an Asset you have found should *not* reside at that Location, do not perform any transactions to

rectify the misplacement. Just use the [Edit](#) asset screen to look up the Asset Tag's correct Location, then cancel out of the Edit transaction, and physically relocate the Asset to its correct Location - so that reality is made to conform with the database.

6. If an Asset is missing at the Location being Audited, you must perform a Dispose transaction to declare it missing.

3.4.12 Windows Mobile/CE Dispose

The **Dispose** transaction is used to remove an Asset from the database.

1. To dispose of an assets, from the **Main** menu, tap **Dispose**. The **Dispose** screen appears:



The screenshot shows the 'Dispose' screen with the following fields:

Asset Tag:	<input type="text"/>	
Description:	<input type="text"/>	
Site:	<input type="text"/>	
Location:	<input type="text"/>	
Reason:	<input type="text"/>	

At the bottom right, there are two buttons: a green checkmark and a red 'X'.

2. Begin by scanning in, searching (via the Magnifying Glass icon), or manually entering the **Asset Tag** you want to **Dispose**.



The screenshot shows the 'Dispose' screen with the following fields filled:

Asset Tag:	1002	
Description:	Monitor 17"	
Site:	Bldg 2	
Location:	Sh15 bin3	
Reason:	<input type="text"/>	

At the bottom right, there are two buttons: a green checkmark and a red 'X'.

The selected Asset's **Description**, **Site** and **Location** will be displayed.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

3. Select a **Reason** from the drop down list:

4. Tap the green check mark icon to complete the **Dispose** transaction for that asset, or tap the red X icon to exit the screen without disposing of the asset.

3.4.13 Windows Mobile/CE Maintenance

You can mark maintenance as complete for an asset directly on the mobile device.

1. To mark maintenance as completed for an asset, from the **Main** menu, tap **Maintenance**. The **Maintenance** screen appears:

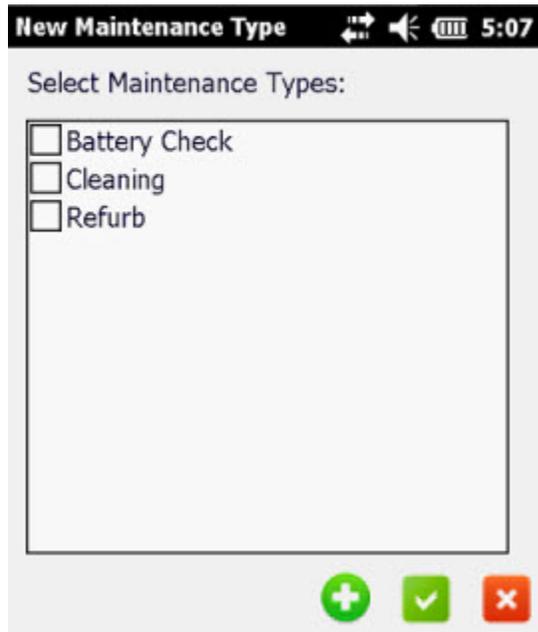


2. Begin by scanning in, searching (via Magnifying Glass icon), or manually entering the **Asset Tag** for which you want to mark maintenance completed.

The selected Asset's **Description** will be displayed.

3. You can optionally click the Camera icon in the bottom, left corner of the screen to include pictures of the asset in this maintenance record. Pictures can be viewed on the [Transaction List](#).
4. You can enter a **Completed On** date, **Condition** and enter **Notes** for this maintenance entry as needed. If the maintenance is completed, select the **Completed** checkbox.

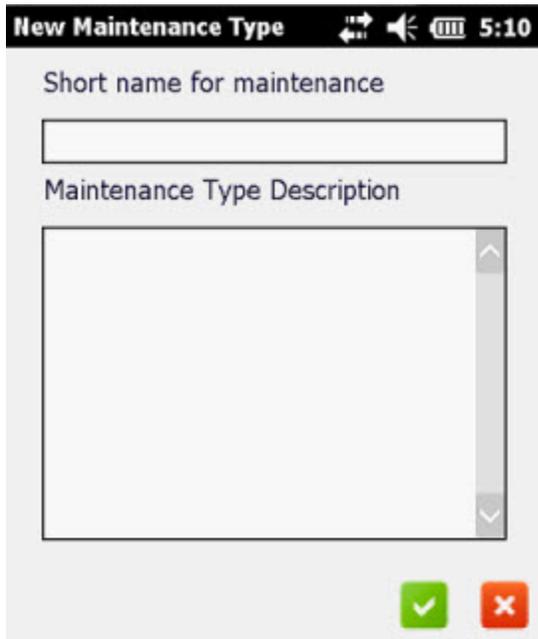
You can choose from a previously created Maintenance note by tapping the Magnifying Glass icon. The **Maintenance Type Search** screen appears:



Any existing **Maintenance Types** will appear in the list. You can select a listing and tap the green check mark icon, or tap the green plus sign icon to create a new **Maintenance Type**.



The following screen will appear:



Enter a name and description for this maintenance, then tap the green check mark icon.

5. Tap the green check mark icon on the **Maintenance** screen to complete the **Maintenance Entry** or tap the red X icon to exit the screen without completing the maintenance.

3.4.14 Windows Mobile/CE Tools

The **Tools** menu allows you to perform a manual Upload, Full Sync or to switch to a different database or a different filter. You can also turn on/off the **Auto Upload** feature from this menu.



The features available on the Tools menu are:

[Auto Upload](#)
[Manual Upload](#)
[Full Sync](#)
[Switch Database](#)
[Switch Filter](#)

Auto Upload

Professional and Enterprise Editions only

Turn the **Auto Upload** feature on to enable auto upload of data from the MobileAsset app to the MobileAsset database. The upload will take place each time you return to the **Main Menu** and select a function. This feature is turned ON by default. To turn it off, tap on the **Auto Upload** option. The menu will close. Reopen it and notice that the checkmark in front of the option as been removed.

Manual Upload

Tap the **Start** button in the **Upload** row to immediately begin a data upload from the MobileAsset app to the MobileAsset database.

If the **Upload** option is not accessible (greyed out), as in the example screen shown above, there is no new data to be uploaded.

Note: Standard Edition users must first connect the device to the PC before beginning the **Manual Upload** process.

Full Sync

Full Sync uploads data from the MobileAsset App to the MobileAsset database followed by a download of the MobileAsset database. This ensures that any changes/new data uploaded from other devices will appear on the current device.

Note: Standard Edition users must first connect the device to the PC before beginning the **Full Sync** process.

Switch Database

Professional and Enterprise Editions Only

If your company uses more than one database, the **Switch Database** function allows you to switch between them.

If you have transactions on the device that have not yet been uploaded to the database, you will not be able to switch databases until the upload is completed.

To change the database, tap the **Switch Database** option. The Log in screen will appear:

MobileAsset 8:37

Log into MobileAsset

Service Url: http://10.1.7.58:10008

Device Name:

User Name:

Password:

OK Exit

Version: 7.00
Build: 4.16.2014.245

Tap the grey **Service URL** field to unpin it, then enter the IP or FQDN of the new database server. Tap **OK** when you are done.

Switch Filter

The **Switch Filter** feature allows you to switch the filter on the database.

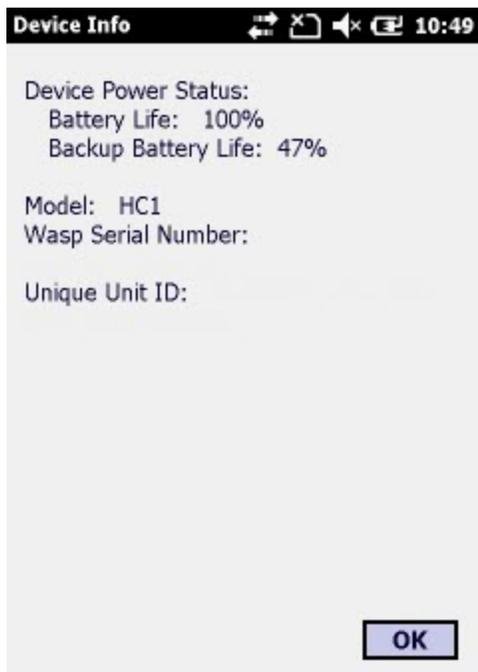
Note: Filters are setup from **Mobility > [Specify Mobile Device Data Filters](#)** screen on the PC.

3.4.15 Windows Mobile/CE Help About

On the Windows Mobile/CE device MobileAsset **Main** menu, select **Help > About** to display the version and build number of the MobileAsset program currently running on the Windows Mobile/CE device.



The **About** screen appears similar to the example shown below:



3.5 Android Devices

3.5.1 Downloading and Installing MobileAsset on Android Devices

Professional and Enterprise Editions Only

1. Download and install the Wasp MobileAsset App from the App Store to your mobile device.
2. Click the MobileAsset icon to open the app.
3. The first time you open MobileAsset, the following screen will appear:



The logo for Wasp Barcode Technologies features the word "Wasp" in a bold, yellow, sans-serif font. To the right of the text is a stylized illustration of a yellow and black wasp with its wings spread. Below the logo, the words "BARCODE TECHNOLOGIES" are written in a smaller, black, all-caps font.

Server URL

Device Name

Username

Password

Login

- **Service URL** - This field auto populates based on the IP or FQDN (Fully Qualified Domain Name) detected when you installed MobileAsset on your PC. The **Service URL** is the IP or FQDN followed by the port number for MobileAsset, usually 10008. The **Service URL** is pinned by default. If you need to modify the Service URL, you can unpin it by tapping on the grey field name. This will unpin the field allowing you to edit the URL information.

Example URL: **http://<your IP address>:10008**

- **Device Name** - Enter a unique name for this mobile device.

If this device has previously been setup on MobileAsset with a different device name, a message will appear. Click **Yes** to use the previous name, click **No** to change the device name.

- **User Name** - Enter your MobileAsset user name.

- **Password** - Enter your MobileAsset password.

For more information on logging in to MobileAsset, please refer to the topic, [Logging In to MobileAsset on Android](#).

3.5.2 Logging In to MobileAsset on Android

Professional and Enterprise Editions Only

When you tap on the MobileAsset icon on your device, the log in screen appears:




Enter your MobileAsset **Username** and **Password**, then tap **Login**.

If you need access to the **Server URL** and **Device Name** fields (seen on the **Log In** screen [the first time it is accessed after installation](#), or when the user selects [Switch Database from the Settings screen](#)), "pinch" anywhere on the **Log In** screen. To pinch the screen, press two fingers to the screen, then move them together in a pinching motion. You will be asked if you want to switch to a different database or a different server. Tap **OK** to access the screen.

3.5.3 Printing from the MobileAsset App in Android

Professional and Enterprise Editions Only

Printing Labels

To print labels from the **New** and **Edit** asset screens in the MobileAsset app, you will need to have your ZPL printer set up on your network. [You will need to select the printer IP and a port.](#)

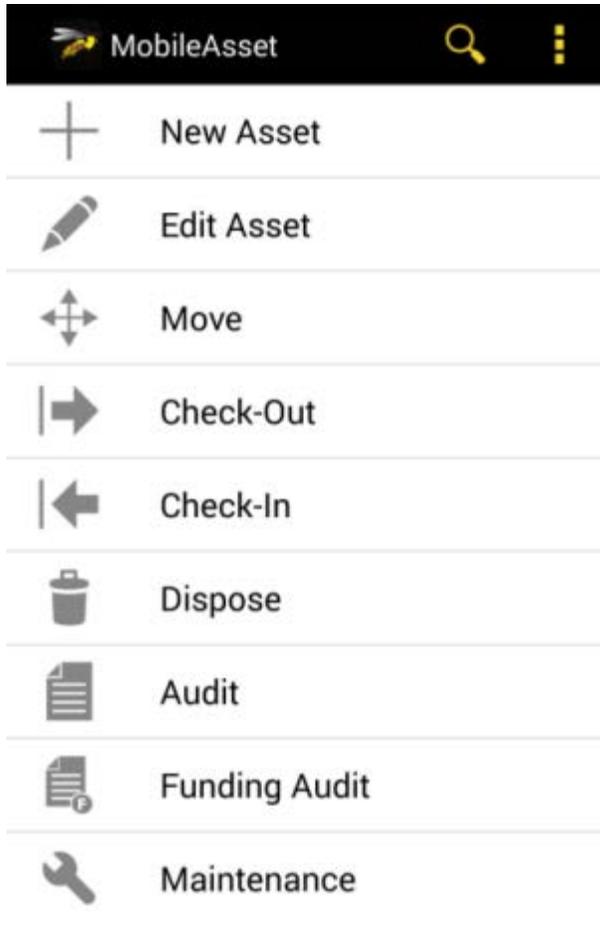
Printing Receipts

To print receipts from the **Check Out** and **Check In** screens, you will need an airprint compatible printer. Make sure the device is logged into wifi and is on the same subnet with the printer itself.

3.5.4 Android Main Menu

Professional and Enterprise Editions Only

After logging in to MobileAsset the **Main Menu** appears.



All of the functions available in MobileAsset are available from the **Main Menu**. To open a feature, click on a listing in the menu.

You can display or hide the **Main Menu** by clicking the  icon located in the top, left of most screen.

3.5.5 Android Add New

Professional and Enterprise Editions Only

You can create new Assets, Asset Tags, Locations, Departments, Manufacturers and Vendors in the MobileAsset app. This new data will be transmitted to the MobileAsset database in real time where it will become available to all devices and on the PC.

The only "Add New" screen that is accessed directly is the **New Asset** screen (accessed from the **Main Menu**). For other new information, you can enter the data in the appropriate field. MobileAsset will recognize the data as new and ask you if you want to add it to the database.

[New Asset](#)

[New Asset Type](#)

[New Location](#)

[New Department](#)

[New Manufacturer](#)

[New Vendor](#)

Sites and **Locations** must be created on the PC.

Other topics that are related to **Adding New** information are:

[Search](#)

[Pinning Data](#)

New Asset

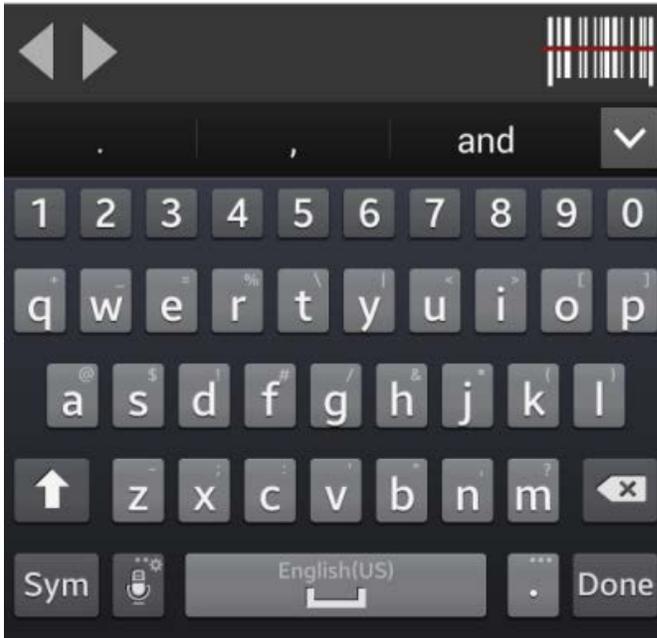
1. From the **Main Menu**, tap the **New Asset** option. The **New Asset** screen appears.

The screenshot shows the 'New Asset' screen with the following fields and controls:

- GENERAL** (selected tab), LINKING, PICTURE, CUSTOM
- * Asset Tag:
- * Asset Type:
- Description:
- * Site:
- * Location:
- Serial #:
- Department:
- Condition:
- Summary
- Save+

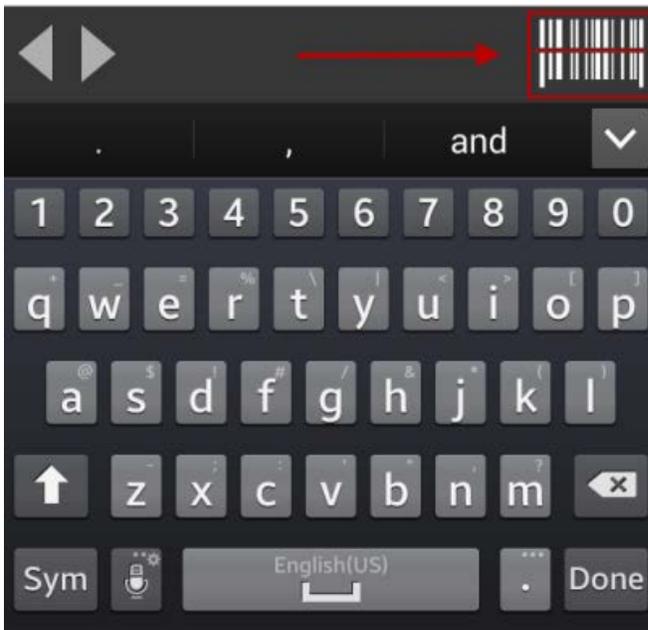
Note: Fields that are preceded by an asterisk (*) are required.

2. Tap in the field into which you want to enter data. The keyboard will appear at the bottom of the screen.



Tap **Done** at anytime to hide the keyboard.

If you want to scan a barcode, tap the barcode icon.



The scanner feature will open. Hold your device over the barcode. When MobileAsset has successfully read the barcode, the data will appear in the **Asset** field.

You can use the right and left arrow keys at the top of the keyboard to scroll through the fields.

3. Enter an **Asset Type** for this asset. This is a required field. You can enter a tag into the field using the keyboard, tap the **Scan** icon to scan a barcode, or click the Magnifying Glass icon to access the [Search](#) screen.

You can also add a new **Asset Type** by entering new information in the field. MobileAsset will recognize the

data as new and prompt you to create the new Asset Type. For detailed instructions, please refer to the section **New Asset Type** later in this topic.

- After you select an **Asset Type**, the following screen will appear:

Set Common Asset Fields?

Do you want to populate the asset fields that are in common with the asset type with the asset type values?

No	Yes
----	-----

Select **Yes** to populate the fields that appear on the **Type** tab with information from the **Asset Type**.

Select **No** to leave those fields blank.

- Next enter the **Site** and **Location** for this asset following the instructions in step 2. Keep in mind that you cannot create new **Sites** on the mobile device. These will need to be created on the PC.
- You can optionally enter a **Description**, **Serial #**, **Department** and **Condition** for the asset as well.
- If you are using the Professional or Enterprise edition of MobileAsset, the **Linking** tab will be displayed. Tap on the tab label to open it.

☰ 🔍 ↻ ⋮

GENERAL
LINKING
PICTURE
CUSTOM

Asset Tag:

Transact As Whole

Parent Asset: 🔍

Child Assets:
+

Summary

Save+

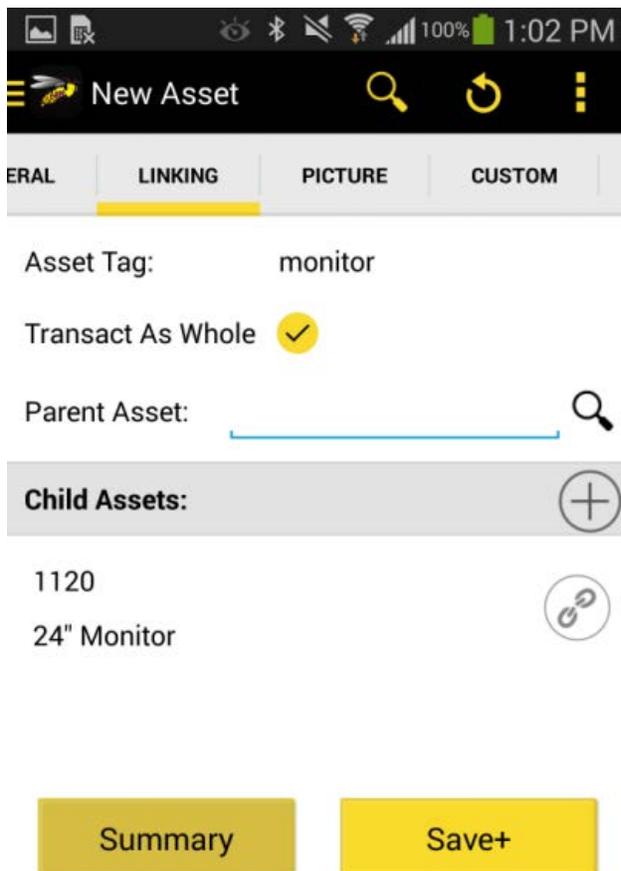
Asset Linking allows you to link two or more assets together to form one new asset. For example, the asset Mary's Computer may consist of 4 separate assets - CPU, Keyboard, Mouse and Monitor. These four individual assets are linked together to form one new asset, Mary's Computer. [For a complete definition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

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*), enter or scan an asset or tap the Magnifying Glass icon to search for an asset.

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

To associate child assets with this asset (the current asset will be the "parent" of these assets), click the yellow + sign. The **Search Asset** screen will appear displaying all assets in the database. You can search for an asset by entering a full or partial asset tag or description in the search field and clicking the Magnifying Glass icon. Tap on an asset in the list to link it to the new asset.

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:



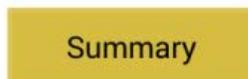
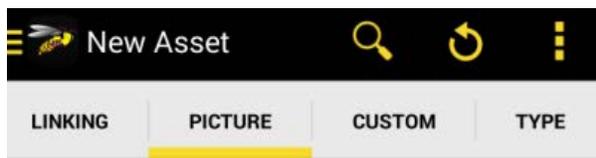
You can unlink the asset by tapping the **Unlink** icon.



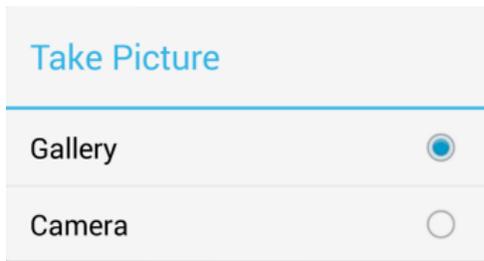
A Note about the Transact as Whole Flag: In the example above, the **Transact as whole** flag is checked; therefore, any functions (check in, check out, audit, move, etc.) will be performed as a whole for the group. This flag is driven from the top down, meaning the selection made for the parent asset 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 check box. Deselecting it on the **Edit Asset > Asset Linking** tab for the child asset 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 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.

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 software 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.

- 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 or to add a new picture to this asset.



Click the **Camera** icon. A screen will appear asking if you want to take a new picture or browse for a picture on your device.

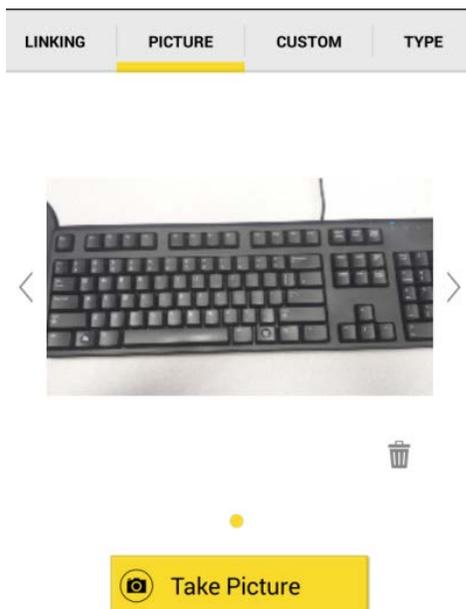


Camera - Select this option to access the camera feature on your device. Take the picture as you normally would on your device, then select **Save**, or **Discard** to discard the current picture and take another. When you select **Save** the image will be displayed on the **Picture** tab. Images taken via the camera through the MobileAsset app are saved to your device and to the MobileAsset database.

Note: If you take a picture from the MobileAsset app, the picture will be saved to your picture gallery. Be aware that the picture will be rotated 90 degrees in the gallery view.

Gallery - Select this option to browse for a picture on your device.

When you select or take a photo, it will appear in the **Picture** tab.



Click the **Trash can** icon to delete the image.

The number of pictures you can attach to an asset is limited by the number set in [Options > Maximum Pictures Captured](#). The default number of captures is 5.

Note: After uploading data to the PC, any pictures taken via the Android app will appear as attachments on the [Edit Asset screen > Attachment tab](#). Pictures taken via the Android app will not appear on the **Edit Asset screen > Picture tab** by default. You can set an image as default to have it appear on the **Picture** tab by following the instructions provided in the topic [New Asset screen > Picture tab](#).

- The **Custom** tab displays any custom fields, either static or dynamic, set up on the PC.

Dynamic custom fields are only available for the Professional and Enterprise editions. For more information on these fields, please refer to the topics [Using Custom Fields](#) and [Using Dynamic Custom Fields](#).

An example of the **Custom** tab displaying Dynamic custom fields is shown below:

The screenshot shows the 'New Asset' screen with the 'CUSTOM' tab selected. The 'Dynamic Fields' section contains two required fields, each with a magnifying glass icon for search:

- * Glo T3 R O xD:
- * Glo T4 R xO xD:

At the bottom of the screen are two buttons: 'Summary' and 'Save+'.

If any of the fields are set to be required, they will appear with an asterisk (*) in front of them. You must complete all required custom fields before you can save the asset.

Click the Magnifying icon next to each field to view any **Predefined** values as well as recently used values.

- The **Type** tab contains information related to the **Asset Type** such as depreciation and Asset Length. If you selected to set common asset fields in Step 4, the fields on this tab will be populated with data from the asset type. In addition, if the [Edit Inherited Asset Type data option](#) is turned off, any of the fields that are in common with the **Asset Type** will not be editable, even if they are blank.

If **Depreciation** is not set for the **Asset Type** associated with the asset, you will no be able to select a **Depr. Class** here. Depreciation can be set for an Asset Type on the PC only.

New Asset

LINKING PICTURE CUSTOM TYPE

Depr. Class:

Category:

Manufacturer:

Model #:

Vendor:

Check Out Length: A-Day(s) A-Hr(s) A-Min(s)

Lead Time: A-Day(s) A-Hr(s) A-Min(s)

Summary Save+

Enter information on this screen as needed. Keep in mind that if you enter a new manufacturer or vendor here, you will be given the opportunity to add them to your database. For more information see **Add New Manufacturer** and **Add New Vendor** later in this topic.

- When you are finished entering information for this asset, tap the **Save** button at the bottom of the screen.

Notice that after you select **Save**, a number appears next to the **Summary** button.



This indicates how many assets you have created during this session. Tap the **Summary** button to view the summary information. Details of each asset you have added this session will display:

The screenshot shows a mobile application interface with a black header bar containing a back arrow and a yellow icon, followed by the word "Summary" in white. Below the header is a white card with the following text: "Asset Tag: monitor", "Serial #:", "Asset Type: ACL 24" Monitor", "Site/Location 23, 2000 I", and "ACL 24" Monitor" with a small square icon to its right. Below the card is a large yellow button with the word "Print" in black text.

Tap the **Print** icon to print labels for these assets. The labels will print to your ZPL printer that is on your network. For information on printing from Android, please refer to the topic [Printing from the MobileAsset App in Android](#).

New Asset Type

1. When you enter new data into the **Asset Type** field MobileAsset will recognize it as new and the following prompt will appear:

The screenshot shows a dialog box with a light gray background. At the top, the title "New Asset Type" is displayed in blue. Below the title, the text reads: "The asset type you have entered does not exist in the database. Do you want to create a new asset type ID?". At the bottom of the dialog, there are two buttons: "No" on the left and "Yes" on the right.

2. Tap **Yes** to access the **New Asset Type** screen.

The screenshot shows the 'New Asset Type' form with the following fields and values:

- * Asset Type: keyboard
- Description: (empty)
- Depr. Class: (empty)
- Category: (empty)
- Manufacturer: (empty)
- Model #: (empty)
- Vendor: (empty)
- Check Out Length: (empty)
- Lead Time: (empty)

A yellow 'Save+' button is located at the bottom of the form.

Enter information in the following fields:

Asset Type - This field is required. The asset type is a category for assets and is required to create new asset types. 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. Asset Tags must be unique across all Sites and Locations. A particular value can occur only once in the Asset database.

Asset Type Description - Enter a description for this **Asset Type**.

Depr Class and **Category** are optional fields. A selection can be made from any previously defined values found on the search screen or you can create a new Class or Category by entering new information in the field..

MobileAsset can perform depreciation calculations at the PC for any Depreciation Class assigned to asset types for which that option has been enabled. The mobile device does not distinguish those Depreciation Classes for which depreciation has been enabled from those where it has not. If you define a new Depreciation Class on the mobile device for which depreciation should be calculated, the option will have to be enabled for that Depreciation Class. [Click here for information on enabling depreciation.](#)

Manufacturer - Scan a manufacturer or tap the Magnifying Glass icon to search manufacturers. You can create a new manufacturer by entering new information in the field.

Vendor - Scan a manufacturer or tap the Magnifying Glass icon to search manufacturers. You can create a new

manufacturer by entering information in the field.

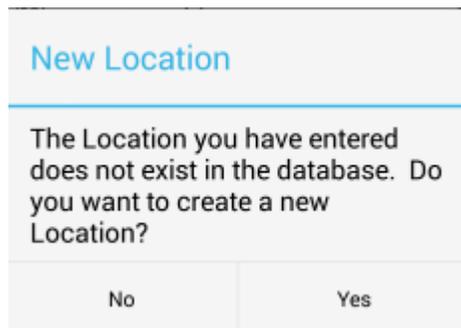
CO Length - The default number of Days, Hours or Minutes the asset type may remain checked out before it is overdue.

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.

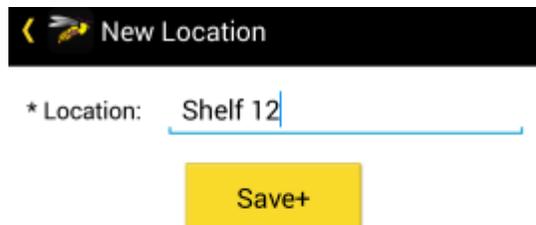
Tap the **Save** button when you are done. You will be returned to the screen you were previously working on.

New Location

When you enter new data into the **Location** field MobileAsset will recognize it as new and the following prompt will appear:



Click **Yes** on the prompt to access the **New Location** screen.



Make sure the **Location** is entered correctly, then tap the **Save** button. You will returned to the screen you were previously working on.

New Department

When you enter new data into the **Department** field MobileAsset will recognize it as new and the following prompt will appear:

New Department	
The department code that you have entered doesn't exist. Do you want to create?	
No	Yes

Click **Yes** to access the **New Department** screen.

New Department	
* Department Code:	<input type="text" value="HR"/>
* Department Name:	<input type="text"/>
<input type="button" value="Save+"/>	

Enter the **Department Code** and **Department Name**, then click the **Save** button.

New Manufacturer

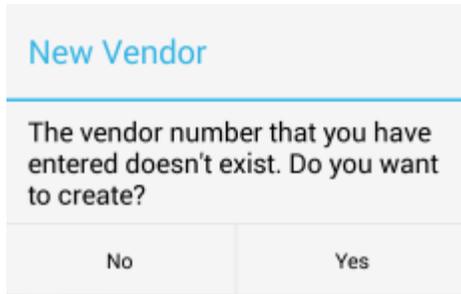
When you enter new data into the **Manufacturer** field MobileAsset will recognize it as new and the following prompt will appear:

New Manufacturer	
The Manufacturer you have entered does not exist in the database. Do you want to create a new Manufacturer?	
No	Yes

Click **Yes** on this prompt to save the new manufacturer. If you need to add additional data to this manufacturer, such as address and phone information, you will need to do so on the PC.

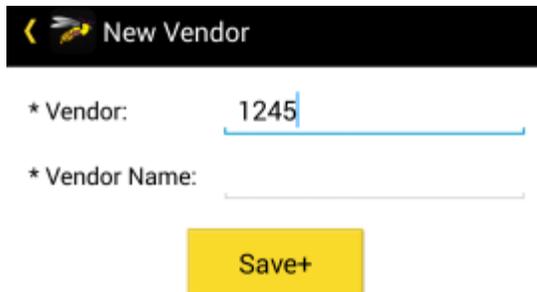
New Vendor

When you enter new data into the **Vendor** field MobileAsset will recognize it as new and the following prompt will appear:



The dialog box has a title bar with the text "New Vendor" in blue. Below the title bar is a message: "The vendor number that you have entered doesn't exist. Do you want to create?". At the bottom of the dialog are two buttons: "No" on the left and "Yes" on the right.

Click **Yes** on the prompt to access the **New Vendor** screen.



The screen has a black header bar with a back arrow icon and the text "New Vendor". Below the header are two input fields: "* Vendor:" with the value "1245" and "* Vendor Name:" which is empty. At the bottom center is a yellow button with the text "Save+".

Enter the **Vendor** code and the **Vendor Name** (optional), then click the **Save** button.

3.5.6 Android Pinning Data

Professional and Enterprise Editions Only

Many fields can be "Pinned" in MobileAsset, allowing for faster data entry. For instance, if you are adding multiple new assets to one Asset Type at a specific Site and Location, you can select information in those fields once, then "pin" the fields. This allows you to quickly create new assets without having to re-enter the Asset Type, Site and Location each time.

To Pin a Field

Press and hold the label of the field you want to pin. The field label will turn bold and the **Search** icon will disappear, indicating it is pinned.

In the example below we have pinned the **Asset Type**, **Site** and **Location** fields.

The screenshot shows the 'New Asset' form with the following fields and their states:

- * Asset Tag:** Input field (unpinned)
- * Asset Type:** Input field containing '12' (pinned, label is bold)
- Description:** Input field (unpinned)
- * Site:** Input field containing 'Garage' (pinned, label is bold)
- * Location:** Input field containing 'Shelf 12' (pinned, label is bold)
- Serial #:** Input field (unpinned)
- Department:** Input field containing 'HR' with a search icon (unpinned)
- Condition:** Dropdown menu (unpinned)

At the bottom, there are two yellow buttons: 'Summary' and 'Save+'. A black circle with the number '1' is positioned over the 'Summary' button.

To Unpin a Field

Press and hold the field label until the label returns to normal type and the search icon reappears.

3.5.7 Android Search

Professional and Enterprise Editions Only

You can search for a variety of information in MobileAsset using the **Search** screens. Anywhere you see a Magnifying Glass icon next to a field, you can click on the icon to access the search screen. The searchable data is limited to field. For instance, if you click the Magnifying Glass icon next to the Asset Type field, the search screen will only search for Asset Types.

Click the Magnifying Glass next to a field.

* Asset Type: 

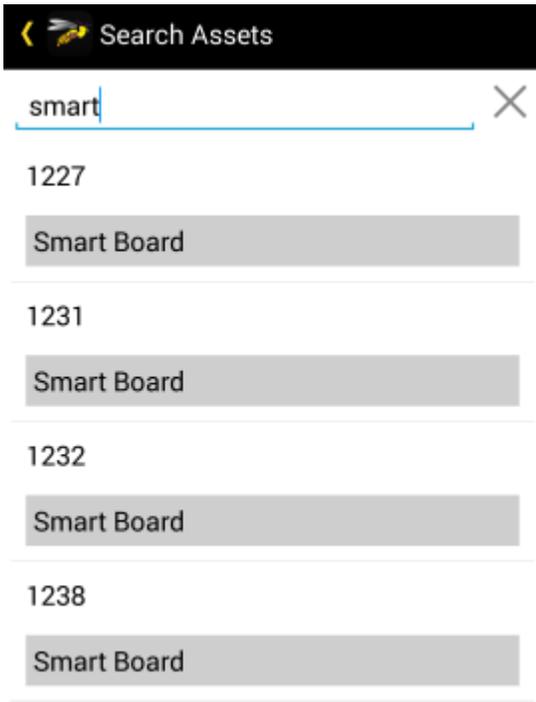
Note: The **Asset Search** function is available from the toolbar at the top of most screens.



The appropriate search screen appears. In this example, we have accessed the **Asset Search**.



Tap in the text field at the top of the screen to access the keyboard, then type in a full or partial name, asset tag, etc. Click the Magnifying glass icon when you are done entering information. Search results will appear on the screen.



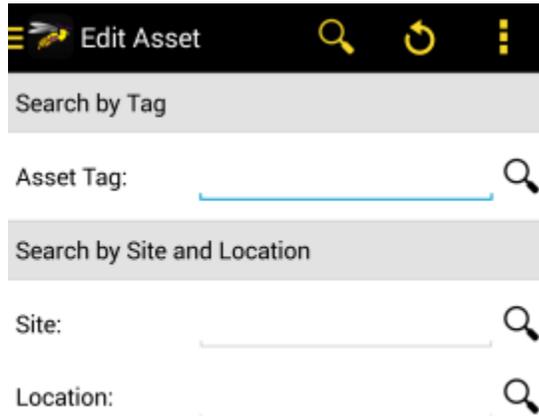
Tap on a listing in the search results to select it.

3.5.8 Android Edit Asset

Professional and Enterprise Editions Only

This feature allows you to edit an existing asset.

1. From the **Main Menu**, tap **Edit Asset**. The **Edit Asset** search screen appears.



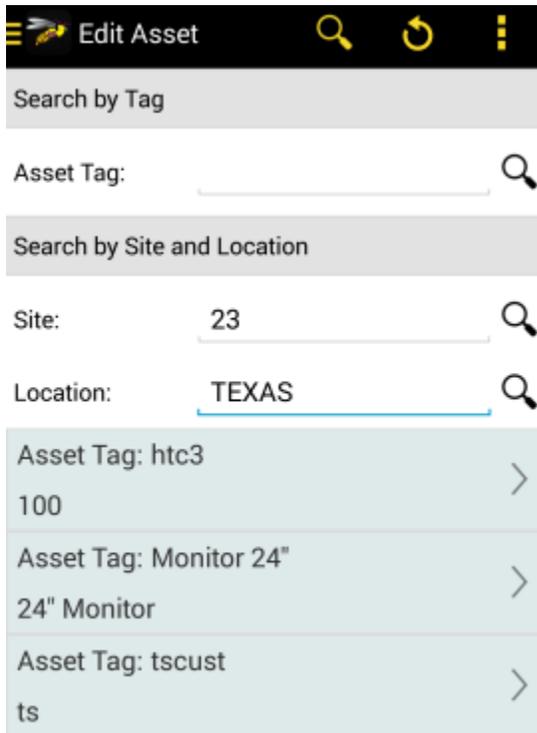
2. This screen is divided into two sections containing search options. Select how you want to search for the asset you need to edit.

Your options are:

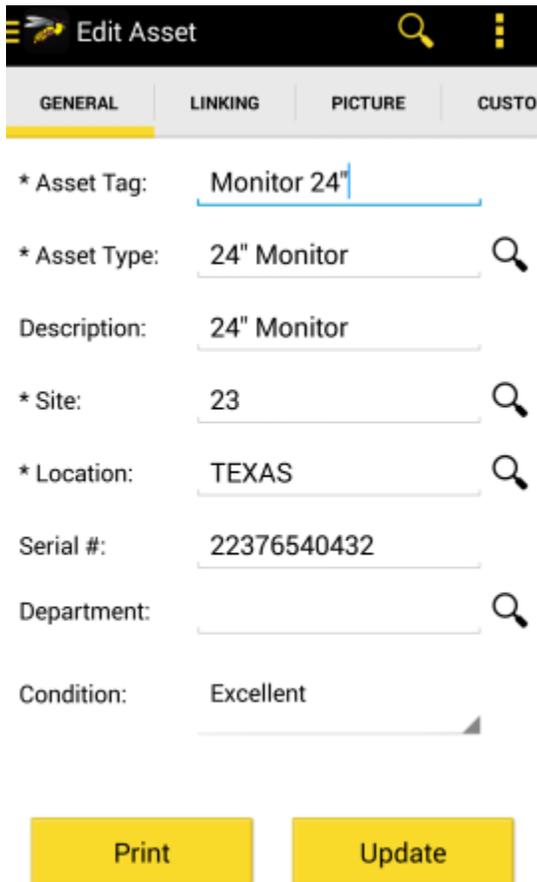
Search by Tag - Scan, enter using the keyboard or [Search](#) for an existing asset tag. On the Search screen, enter a full or partial tag, then tap the Magnifying Glass icon. Tap the asset you want to edit in the Search results. The **Edit** screen will appear (see example in Step 3).

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Search by Site and Location - Scan, enter using the keyboard or [Search](#) for a **Site** and/or a **Location**. A list of assets located at the specified **Site/Location** will appear.



3. Tap on the asset you want to edit. The **Edit** screen will appear:



4. Make changes as necessary to the asset.

5. If you want to print a label for this asset, tap the **Print** button.
6. When you are finished, tap the **Update** button.

3.5.9 Android Move Asset

Professional and Enterprise Editions Only

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

1. From the **Main Menu** tap **Move**. The **Move** screen appears.

2. Scan, enter using the keyboard or [Search](#) for a **To Site**. This is the site to which you are moving the asset.
3. Scan, enter using the keyboard or [Search](#) for a **To Location**. This is the location to which you are moving the asset. The results on the search screen will be limited to locations within the selected site.
4. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**. The **Description**, **From Site** and **From Location** will populate with information from the selected **Asset Tag**.

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [Android Pinning Data](#).

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

5. When you have entered your selections, tap the **Move** button.

3.5.10 Android Check Out

Professional and Enterprise Editions Only

The **Check Out Asset** transaction provides the ability to check-out assets to a customer or employee, specifying a Due Date and Due Time by which the asset should be checked-in.

You have two options for checking out assets, **Advanced** and **Quick**.

Advanced check out allows you to check out a number assets to an employee or customer, then view the **Summary** screen where you can collect a signature and/or print a receipt.

Quick check out can be used when you have many assets you want to check out to different customers/employees without worrying about gathering signatures on each one. This mode allows you to select a customer or employee and check out the asset without having to collect signatures or view the summary screen for each transaction.

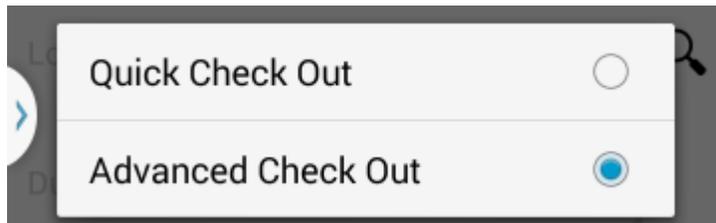
Note: Quick check out is not available if the [Require a Signature on Device is set to Yes on the Options screen](#).

[Advanced Check Out](#)

[Quick Check Out](#)

Advanced Check Out

1. From the **Main Menu** tap **Check Out**. If this is the first time you have accessed this feature the **Check Out** popup menu will appear:



Click **Advanced Check Out** on the popup menu. The **Advanced Check Out** screen appears:

Note: The popup menu does not automatically appear on subsequent taps. To change from **Quick** check out to **Advanced** check out or vice-versa, press and hold the **Check Out** menu option. The pop up menu will appear asking if you want **Advanced** or **Quick** check out.

- Assets can be checked out to customers or to employees. By default, the **Check Out** screen is set to **Customer #**. You can switch to **Employee #** by tapping on the  icon next to the **Customer #** label. A screen will appear allowing you to select **Customer #** or **Employee #**.

The **Check Out** screen will show your change.

- Scan, enter using the keyboard or [Search](#) for an **Employee** or **Customer**.

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [Android Pinning Data](#).

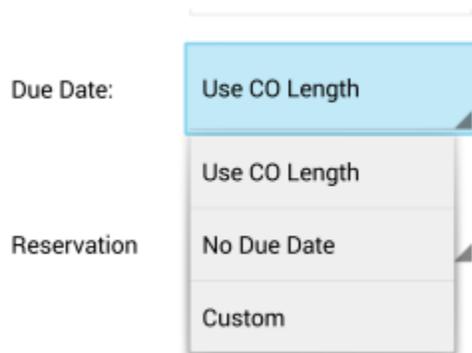
4. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**.

The **Description**, Site and Location fields will populate when you select the **Asset Tag**.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

5. The **Due Date** will default to **Use CO Length**, if a check out length was set for this asset type. The default can be accepted or overwritten if necessary. To change the **Due Date**, tap in the field. The options will appear at the bottom of the screen. Tap on an option to select it.



Due Date options are:

Use CO Length - This uses the check out duration set for the asset type. The Date and Time will be calculated and displayed.

No Due Date - This means the asset will not have a due date set.

Custom - Use this option to set a new due date and time. When this option is selected, the Date and Time fields appear:

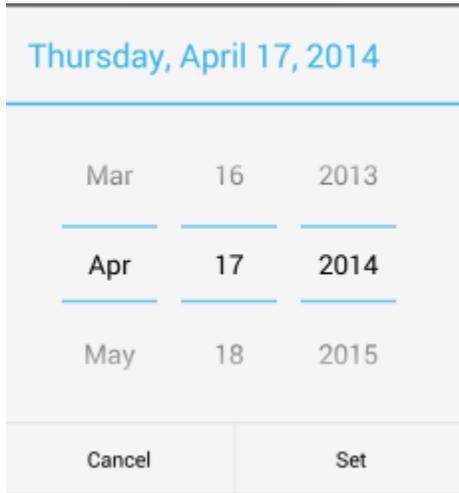
Due Date:

Custom

Date: 04/17/20 02:22 PM

Reservation

Tap on the **Date** field to display the calendar:



6. **(MobileAsset Web Users Only)** If you have created a **Reservation** on MobileAsset Web, you will see the **Reservation** field.

The **Reservation** field displays a drop down list of reservations to which the current asset is tied. Select the reservation from the drop down list for which you want to check out this asset. If you are creating a reservation for the same period for a customer other than the one listed in the reservation, you will receive a warning message.

Tap **OK** on the warning message to continue checking out the asset despite the overlapping period, or click **No** to cancel the check out process.

When you sync the data back to the PC, MobileAsset Web will be updated with the new check out information. The status of the selected reservation will be updated to completed.

7. When you are finished entering information for this asset, tap the **Check Out** button at the bottom of the screen.

Notice that after you select **Check Out**, a number appears next to the **Finish** button.



This indicates how many assets you have checked out to the customer/employee during this session. Tap the **Finish** button to view the summary information. Details of each asset you have checked out will display:

8. Depending on the MobileAsset PC options, you may be prompted to obtain a signature or a signature may be required.

If you are prompted to obtain a signature, tap **Yes** on the prompt screen.

If you are not prompted but want to add a signature or print a receipt, select the Signature and/or Print checkboxes at the bottom of the summary screen.

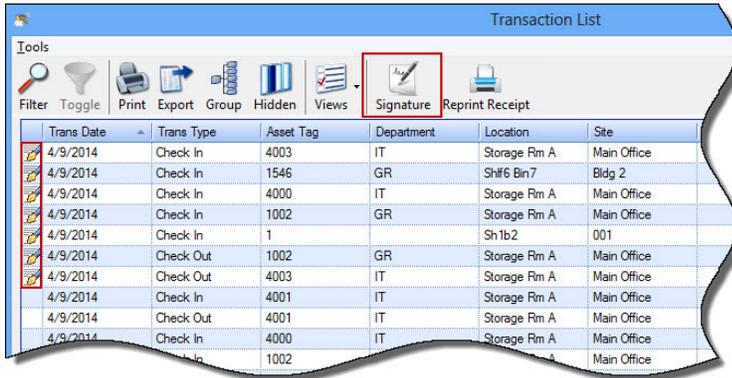
9. Click the **Commit** button. If you selected Signature, the **Signature** screen appears:

Have the employee or customer sign on the line using their fingertip.



If you are satisfied with the signature, tap **Save**. If you want to erase the current signature and try again, tap **Reset**. To close the **Signature** screen without saving the signature, tap **Dismiss**.

The signature is saved on the device until the next data upload to the PC. Once it is uploaded to the PC, you can view it by going to the **Transactions List (Main > List Forms > Transactions)** highlighting the desired transaction and clicking the **Signature** button. Only those transactions with a Pen icon next to them contain signature captures.

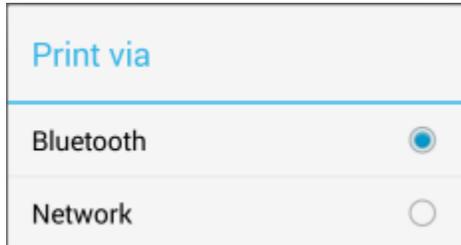


When the **Signature** button is clicked, the **View Signature** screen appears.



Click the Red X in the upper, right corner to close the **View Signature** screen.

- If you selected the **Print** checkbox, the **Print** screen appears. **Note:** You can re-print the check out receipt by highlighting the check out transaction, then clicking the **Reprint Receipt** button.



Tap Bluetooth or Network depending on how your printer is set up. For more information on printing, refer to the topic [Printing from the MobileAsset App in Android](#).

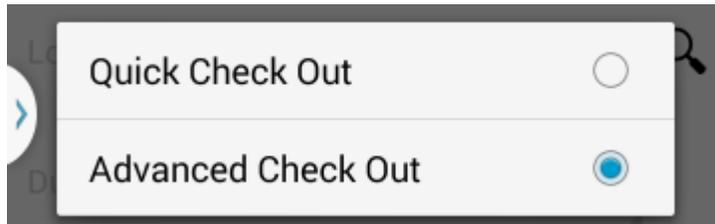
After collecting a signature and printing a receipt the session is closed and you will be returned to the blank check out screen.

Quick Check Out

1. From the **Main** menu, tap **Check Out**. If this is the first time you have accessed the Check Out function, a pop up menu will appear asking if you want **Advanced** or **Quick** check out.

Note: The popup menu does not automatically appear on subsequent taps. To change from **Quick** check out to **Advanced** check out or vice-versa, press and hold the **Check Out** menu option. The pop up menu will appear asking if you want **Advanced** or **Quick** check out.

Select **Quick Check Out**.



The **Check Out** screen appears:

2. Assets can be checked out to customers or to employees. By default, the **Check Out** screen is set to **Customer #**. You can switch to **Employee #** by tapping on the  icon next to the **Customer #** label. A screen will appear allowing you to select **Customer #** or **Employee #**.

The **Check Out** screen will show your change.

3. Scan, enter using the keyboard or [Search](#) for an **Employee** or **Customer**.

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [Android Pinning Data](#).

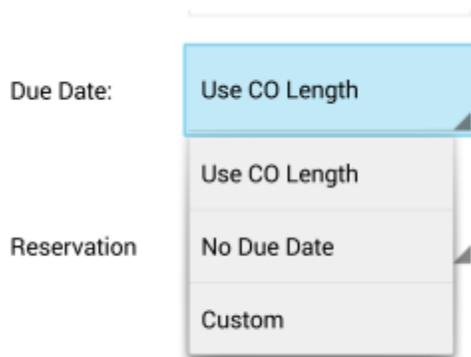
- Scan, enter using the keyboard or [Search](#) for an **Asset Tag**.

The **Description**, Site and Location fields will populate when you select the **Asset Tag**.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

- The **Due Date** will default to **Use CO Length**, if a check out length was set for this asset type. The default can be accepted or overwritten if necessary. To change the **Due Date**, tap in the field. The options will appear at the bottom of the screen. Tap on an option to select it.



Due Date options are:

Use CO Length - This uses the check out duration set for the asset type. The Date and Time will be calculated and displayed.

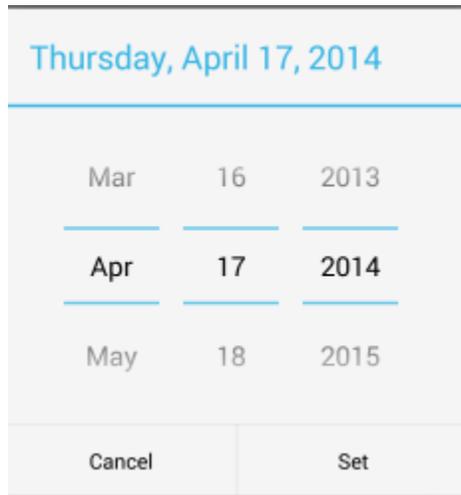
No Due Date - This means the asset will not have a due date set.

Custom - Use this option to set a new due date and time. When this option is selected, the Date and Time fields appear:



Reservation

Tap on the **Date** field to display the calendar:



6. **(MobileAsset Web Users Only)** If you have created a **Reservation** on MobileAsset Web, you will see the **Reservation** field.

The **Reservation** field displays a drop down list of reservations to which the current asset is tied. Select the reservation from the drop down list for which you want to check out this asset. If you are creating a reservation for the same period for a customer other than the one listed in the reservation, you will receive a warning message.

Tap **OK** on the warning message to continue checking out the asset despite the overlapping period, or click **No** to cancel the check out process.

When you sync the data back to the PC, MobileAsset Web will be updated with the new check out information. The status of the selected reservation will be updated to completed.

7. When you are finished entering information for this asset, tap the **Check Out** button at the bottom of the screen.

3.5.11 Android Check In

Professional and Enterprise Editions Only

The **Check In Asset** transaction provides the ability to check in assets currently checked out to a customer or employee.

You have two options for checking in assets, **Advanced** and **Quick**.

Advanced check in allows you to check in a number assets from an employee or customer, then view the **Summary** screen where you can collect a signature and/or print a receipt.

Quick check in can be used when you have many assets you want to check in from different customers or employees without worrying about gathering signatures on each one. This mode allows you to select a customer or employee and check in the asset without having to collect signatures or view the summary screen for each transaction.

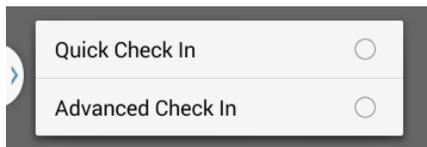
[Advanced Check In](#)

[Quick Check In](#)

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [Android Pinning Data](#).

Advanced Check In

1. From the **Main Menu** tap **Check In** . If this is the first time you have accessed this feature the **Check In** popup menu will appear:



Click **Advanced Check In** on the popup menu. The **Check In** screen appears:

 A screenshot of the "Check In" screen. At the top is a dark header with the text "Check In" and three icons: a magnifying glass, a refresh symbol, and a vertical ellipsis. Below the header are four input fields, each with a magnifying glass icon on the right: "Asset Tag:", "Description:", "Site:", and "Location:". At the bottom of the screen are two yellow buttons: "Check In" and "Finish".

Note: The popup menu does not automatically appear on subsequent taps. To change from **Quick** check out to **Advanced** check in or vice-versa, press and hold the **Check In** menu option. The pop up menu will appear asking if you want **Advanced** or **Quick** check in.

2. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**.

For information on entering or scanning information in MobileAsset, please refer to the topic Entering or Scanning Information. The **Description**, **Site** and **Location** will populate based on the **Asset Tag** entered. You can also scan, enter or search for a **Site** and **Location**.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

3. When you are done entering information tap the **Check In** button.

Notice that after you select **Check In**, a number appears next to the **Summary** button.



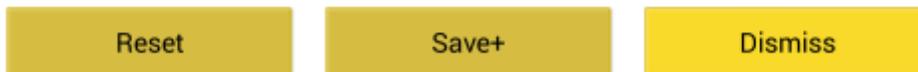
This indicates how many assets you have checked in during this session. Tap the **Summary** button to view the summary information. Details of each asset you have checked in will display:

- Depending on the MobileAsset PC options, you may be prompted to obtain a signature or a signature may be required.

If you are prompted to obtain a signature, tap **Yes** on the prompt screen.

If you are not prompted but want to add a signature or print a receipt, select the Signature and/or Print checkboxes at the bottom of the summary screen.

- Click the **Commit** button. If you selected Signature, the **Signature** screen appears:



Have the employee or customer sign on the line using their fingertip.

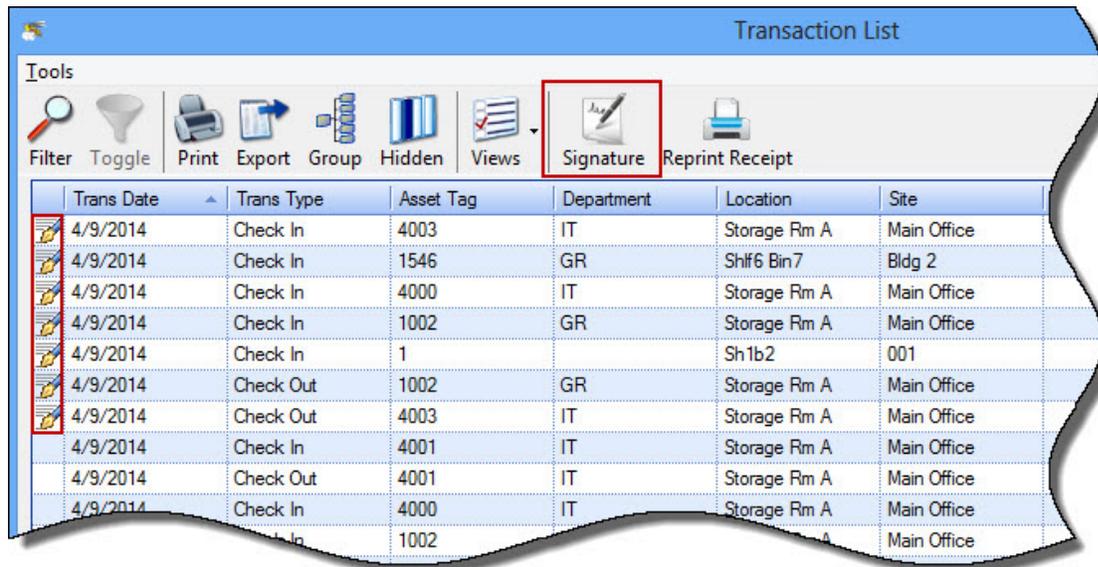


Jane Doe



If you are satisfied with the signature, tap **Save**. If you want to erase the current signature and try again, tap **Reset**. To close the **Signature** screen without saving the signature, tap **Dismiss**.

The signature is saved on the device until the next data upload to the PC. Once it is uploaded to the PC, you can view it by going to the **Transactions List (Main > List Forms > Transactions)** highlighting the desired transaction and clicking the **Signature** button. Only those transactions with a **Pen** icon next to them contain signature captures.

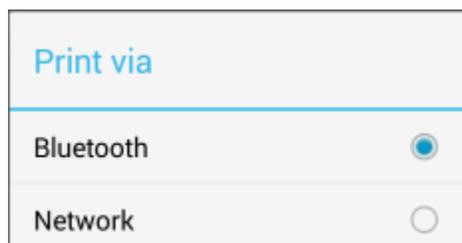


When the **Signature** button is clicked, the **View Signature** screen appears.



Click the Red X in the upper, right corner to close the **View Signature** screen.

If you selected the **Print** checkbox, the **Print** screen appears:



Tap Bluetooth or Network depending on how your printer is set up. For more information on printing, refer to the topic [Printing from the MobileAsset App in Android](#). You can re-print the check in receipt by highlighting the check in transaction, then clicking the **Reprint Receipt** button.

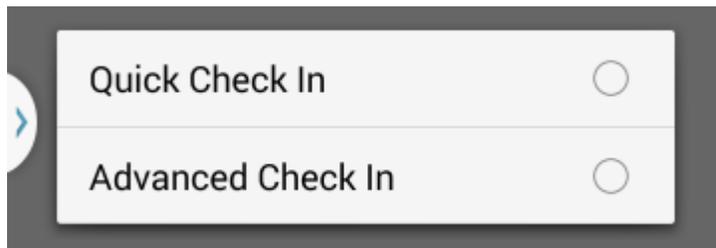
After collecting a signature and printing a receipt the session is closed and you will be returned to the blank check out screen.

Quick Check In

1. From the **Main** menu, tap **Check Out**. If this is the first time you have accessed the Check Out function, a pop up menu will appear asking if you want **Advanced** or **Quick** check out.

Note: The popup menu does not automatically appear on subsequent taps. To change from **Quick** check in to **Advanced** check in or vice-versa, press and hold the **Check In** menu option. The pop up menu will appear asking if you want **Advanced** or **Quick** check in.

Select **Quick Check In**:



The **Check In** screen appears:

 A screenshot of the "Check In" screen in the mobile application. The screen has a black header with a yellow "Check In" title and three icons: a magnifying glass, a refresh icon, and a list icon. Below the header are four input fields: "Asset Tag" (with a magnifying glass icon), "Description", "Site", and "Location". At the bottom of the screen is a large yellow button labeled "Check In".

2. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**.

For information on entering or scanning information in MobileAsset, please refer to the topic Entering or Scanning Information. The **Description**, **Site** and **Location** will populate based on the **Asset Tag** entered. You can also scan, enter or search for a **Site** and **Location**.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

3. When you are done entering information tap the **Check In** button.

3.5.12 Android Dispose

Professional and Enterprise Editions Only

The **Dispose** transaction is used to remove an asset from the 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. From the **Main Menu** tap **Dispose**. The **Dispose** screen appears:

The screenshot shows the 'Dispose' screen in the MobileAsset application. The header is black and contains a hamburger menu icon, the text 'Dispose', a search icon, a refresh icon, and a vertical ellipsis icon. Below the header are five input fields: 'Asset Tag:' with a search icon, 'Description:', 'Site:', 'Location:', and 'Reason:'. At the bottom is a large yellow button labeled 'Dispose'.

2. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**.

For information on entering or scanning information in MobileAsset, please refer to the topic Entering or Scanning Information.

The **Description**, **Site** and **Location** fields will populate after you select an **Asset Tag**.

3. Enter a **Reason** for this **Dispose** transaction by clicking in the **Reason** field. A menu will appear listing the options. Reasons are: **Sale**, **Lost**, **Damaged**, **Trade In**, **Stolen** or **Other**.
4. When you are finished entering information, tap the **Dispose** button.

3.5.13 Android Audit

Professional and Enterprise Editions Only

The **Audit Assets** transaction is used to verify or update the location of one or more assets.

1. From the **Main Menu** tap **Audit**. The **Audit** screen appears.

The screenshot shows the 'Audit' screen with the following elements:

- Header: 'Audit' with search, refresh, and menu icons.
- Site: [input field] with a search icon.
- Location: [input field] with a search icon.
- Audit Start Time: [04/17/2014] [03:11 PM]
- Find Assets button (yellow)

2. Select a **Site** and **Location** for this audit by scanning, enter using the keyboard or [Searching](#).

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [Android Pinning Data](#).

3. Set an **Audit Start Time**. This feature allows you to stop and restart an audit without auditing the same inventory twice by telling MobileAsset to only include those assets that were not audited prior to the entered start date and time. For example, if you begin an audit on November 6, but had to stop at midnight and the audit was not completed, you can enter 11/7/2014 at 12am to begin the new audit. This means that only items that have not been audited as of 12am on November 7 will be included in this audit.
4. Tap the **Find Assets** button. The **Audit** screen will appear listing all assets not yet audited at the selected location.

Asset Tag:

Description:

3 Assets not audited at location: TEXAS

Asset Tag:htc3
S/N:
100

Asset Tag:Monitor 24"
S/N:22376540432
24" Monitor

Asset Tag:tscust
S/N:
ts

Start Audit

- When you have verified the assets are at the location, tap on one or more assets in the list, then tap the **Start Audit** button. Those items will be removed from the list. Keep auditing until your list indicates you have 0 assets not audited at the location.

When **0 Assets not audited at location** is displayed, you can begin Auditing any assets you have found at that Location which asset did not list.

For each asset that MobileAsset did not list, enter a specific **Asset Tag** by scanning, entering using the keyboard or [Searching](#), then tap the **Start Audit** button. A message will appear notifying you that the asset is not at the specified location. You can either move the asset to this location and audit it, or mark it as audited in the location it is assigned to in MobileAsset. Keep in mind that whichever option you choose, the asset will be audited.

If you know that an asset you have found should *not* reside at that Location, do not perform any transactions to rectify the misplacement. Use the [Edit](#) screen to look up the Asset Tag's correct Location, then exit the **Edit** screen, and physically relocate the asset to its correct Location.

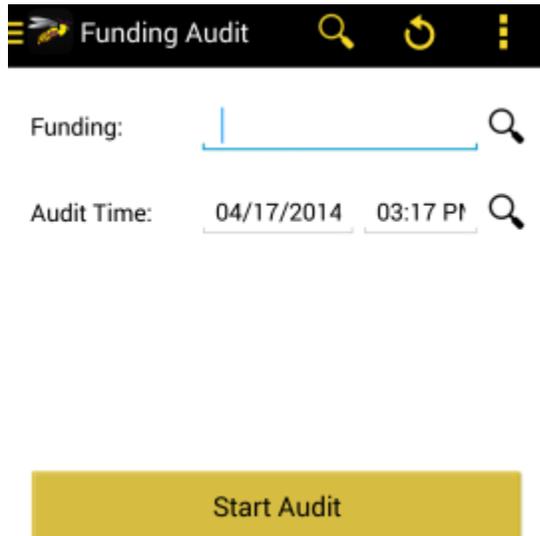
If an asset is missing at the location being audited, you must perform a [Dispose](#) transaction to declare it missing.

3.5.14 Android Funding Audit

Professional and Enterprise Editions Only

The **Funding Audit** function allows you to audit those assets associated with a funding source.

1. From the **Main Menu** tap **Funding Audit**. The **Funding Audit** screen appears.



2. Select a **Funding** source by scanning, enter using the keyboard or [Searching](#).

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [Android Pinning Data](#).

When you select a **Funding** source, a list of **Sites** and **Locations** containing assets associated with that source will appear:

Funding Audit

Funding: StarGrant

Audit Time: 04/17/2014 03:17 PM

Site: Warehouse

Location: Bay 4

Count 1

Start Audit

3. Enter the **Audit Time** or use the Magnifying Glass icon to search for a recent Audit.

This feature allows you to stop and restart an audit without auditing the same inventory twice by telling MobileAsset to only include those assets that were not audited prior to the entered start date and time. For example, if you begin an audit on November 6, but had to stop at midnight and the audit was not completed, you can enter 11/7/2014 at 12am to begin the new audit. This means that only items that have not been audited as of 12am on November 7 will be included in this audit.

4. Highlight a **Site** in the list and tap the **Start Audit** button.

Funding Audit

Funding: StarGrant

Audit Time: 04/17/2014 03:17 PM

Site: Warehouse

Location: Bay 4

Count 1

Start Audit

5. The **Audit** screen appears with a list of assets not yet audited at the selected **Site/Location**:

< Audit

Asset Tag: 🔍

Description:

1 Assets not audited at location: Bay 4

Asset Tag: Washing Machine

S/N:

Cleans the products before assembly

Start Audit

When you have verified the assets are at the location, tap on one or more assets in the list, then tap the **Start Audit** button. Those items will be removed from the list. Keep auditing until your list indicates you have 0 assets not audited at the location.

When **0 Assets not audited at location** is displayed, you can begin Auditing any assets you have found at that Location which asset did not list.

For each asset that MobileAsset did not list, enter a specific **Asset Tag** by scanning, entering using the keyboard or [Searching](#), then tap the **Start Audit** button. A message will appear notifying you that the asset is not at the specified location. You can either move the asset to this location and audit it, or mark it as audited in the location it is assigned to in MobileAsset. Keep in mind that whichever option you choose, the asset will be audited.

If you know that an asset you have found should *not* reside at that Location, do not perform any transactions to rectify the misplacement. Use the [Edit](#) screen to look up the Asset Tag's correct Location, then exit the **Edit** screen, and physically relocate the asset to its correct Location.

If an asset is missing at the location being audited, you must perform a [Dispose](#) transaction to declare it missing.

Android Maintenance

Professional and Enterprise Editions Only

You can mark maintenance as complete for an asset directly on the mobile device.

1. From the **Main Menu** tap the **Maintenance** icon. The **Maintenance** screen appears:

The screenshot shows the Maintenance screen with the following fields and controls:

- Header:** Maintenance (title), Search icon, Refresh icon, Menu icon.
- Asset Tag:** Input field with a search icon.
- Description:** Input field.
- Schedule:** Input field with a search icon.
- Completed:** Radio button.
- Completed on:** Date field showing 04-17-2014.
- Condition:** Input field.
- Notes:** Text area with a search icon.
- Buttons:** Picture (yellow), Submit (yellow).

2. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**. The **Description** field will populate.

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [Android Pinning Data](#).

3. Tap the **Schedule** field to view a list of any scheduled maintenance for this asset.

If scheduled maintenance exists for this asset, select it from the list or you can choose **Unscheduled Maintenance**. Tap the Magnifying Glass icon to view the details of the scheduled maintenance on the **Schedule** screen.

< Schedule

Asset Tag:

Schedule:

Schedule Date:

Instructions:

Tap the arrow icon at the top of the screen to return to the **Maintenance** screen.

4. Mark this **Maintenance** as completed by tapping the **Completed** circle.
5. Enter a condition for the asset by tapping in the **Condition** field, then selecting from the list. Options are **Bad**, **Excellent**, **Fine** and **Good**.
6. Enter notes in the **Notes** field as needed. You can search for previously used **Maintenance Types** to add to the Notes field by tapping the Magnifying Glass icon. The **Select Maintenance Type** screen appears:

< Select Maintenance Types:

Monthly

Oil Change

daily

Save+

You can create a new **Maintenance Type** by tapping the yellow + icon.

< Select Maintenance Types:

7. The **New Maintenance Type** screen appears.

Short Name

Full Description

Ok Cancel

Enter a **Short Name** and a **Full Description** for this **Maintenance Type**, then tap the **OK** button. The new **Maintenance Type** will be added to the **Select Maintenance Type** screen.

Tap the **Maintenance Type** you want to use, then tap the **Save** button. The **Maintenance Type** will be added to the **Notes** section.

Maintenance

Asset Tag: 1120

Description: 24" Monitor

Schedule: e Unscheduled

Completed:

Completed on: 04-17-2014

Condition: Monthly ---

Notes: Monthly ---

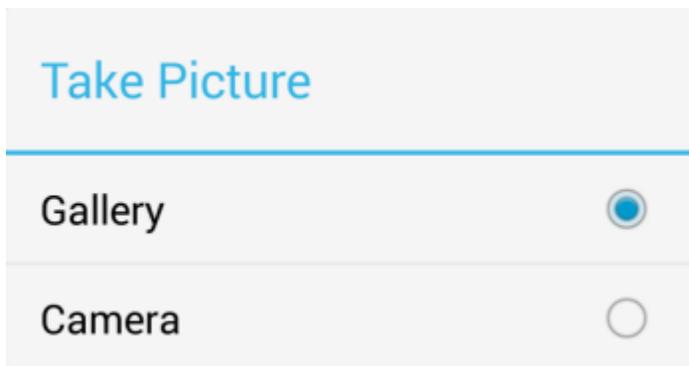
Picture Submit

8. If you want to add a picture of the asset to this **Maintenance**, tap the **Picture** button.

9. The **Picture** screen appears.



Click the **Camera** icon. A screen will appear asking if you want to take a new picture or browse for a picture on your device.

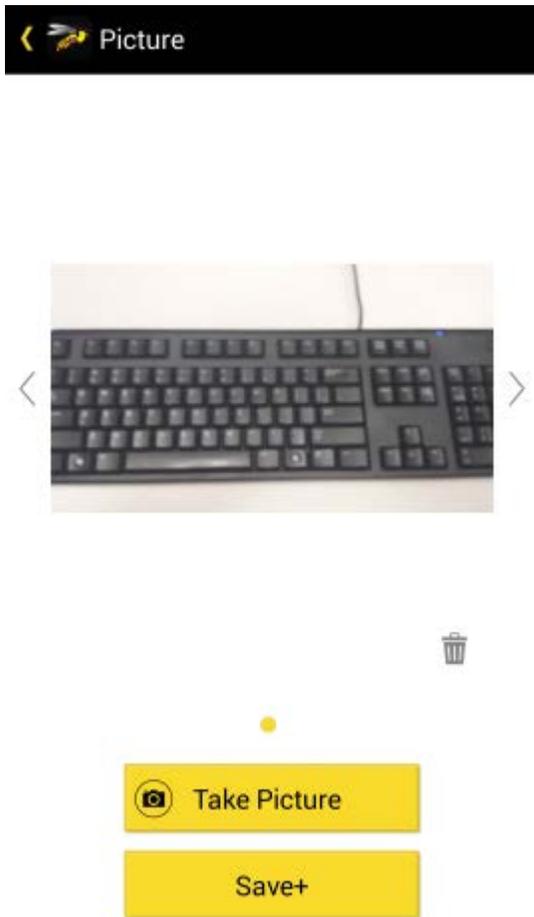


Camera - Select this option to access the camera feature on your device. Take the picture as you normally would on your device, then select **Save**, or **Discard** to discard the current picture and take another. When you select **Save** the image will be displayed on the **Picture** tab. Images taken via the camera through the MobileAsset app are saved to your device and to the MobileAsset database.

Note: If you take a picture from the MobileAsset app, the picture will be saved to your picture gallery. Be aware that the picture will be rotated 90 degrees in the gallery view.

Gallery - Select this option to browse for a picture on your device.

When you select or take a photo, it will appear in the **Picture** tab.



Click the **Trash** can icon to delete the image.

The number of pictures you can attach to an asset is limited by the number set in [Options > Maximum Pictures Captured](#). The default captures is 5.

Pictures can be viewed on the [Transaction List](#).

10. When you are finished adding information, tap the **Submit** button.

3.5.15 Android Settings

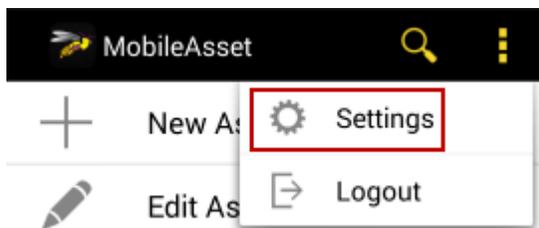
Professional and Enterprise Editions Only

The **Settings** menu allows you to log out of the MobileAsset app, the upload/sync the data on the device with the MobileAsset database.

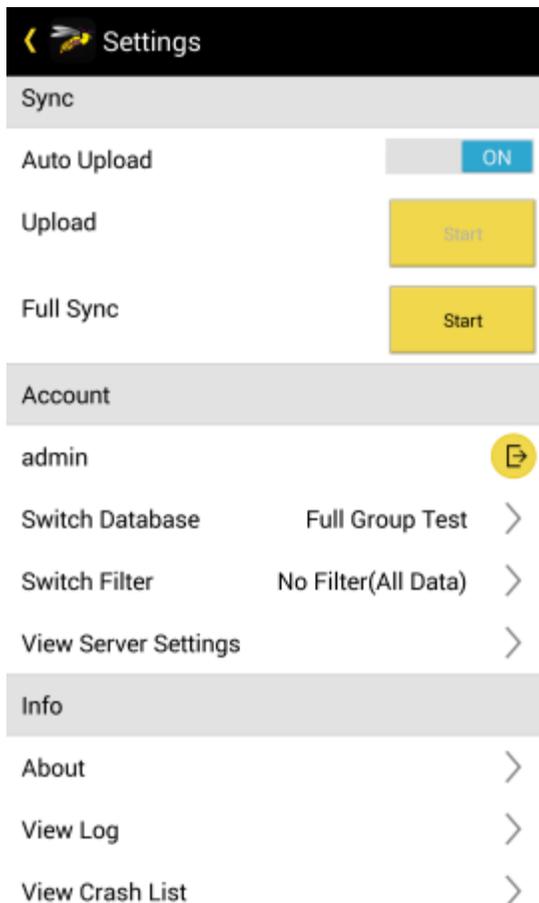
To access the **Settings** menu, tap the  icon from the top of most screens in MobileAsset.



Select **Settings** from the drop down menu.



The **Settings** screen appears.



The features contained in the **Settings** screen are:

Sync

- [Auto Upload](#)
- [Upload](#)
- [Full Sync](#)

Account

- [<Username>](#)
- [Switch Database](#)
- [Switch Filter](#)
- [View Server Settings](#)

Info

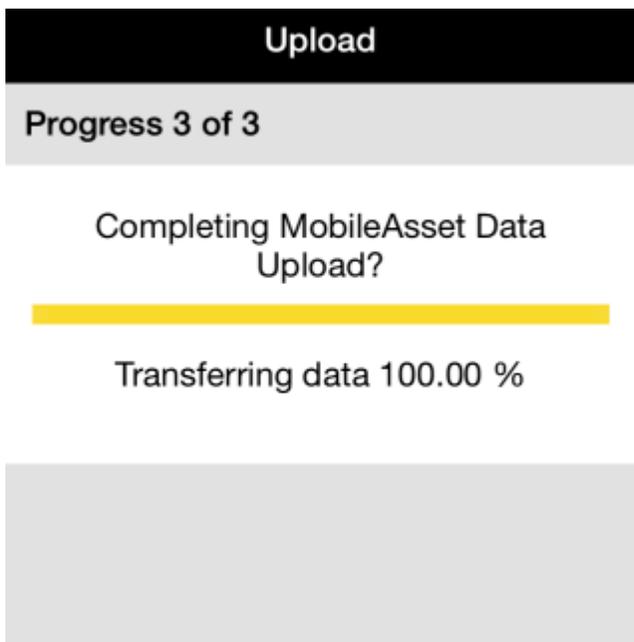
- [About](#)
 - [View Log](#)
 - [View Crash List](#)
 - [View Printer Settings](#)
-

Auto Upload

Turn the **Auto Upload** feature on to enable auto upload of data from the MobileAsset app to the MobileAsset database. The upload will take place each time you return to the **Main Menu** and select a function.

Upload

Tap the **Start** button in the **Upload** row to immediately begin a data upload from the MobileAsset app to the MobileAsset database. When the upload begins a progress screen will appear:



Full Sync

Full Sync uploads data from the MobileAsset App to the MobileAsset database followed by a download of the MobileAsset database. This ensures that any changes/new data uploaded from other devices will appear on the current device.

<Username>

Tap the **Logout** icon next to your user name to log out of the MobileAsset app.

Switch Database

If your company uses more than one database, the **Switch Database** function allows you to switch between them. The currently connected database will appear here.

If you have transactions on the device that have not yet been uploaded to the database, you will not be able to switch databases until the upload is completed.

To change the database, tap the arrow to access the database settings screen:



Server URL

Device Name

Username

Password

Login

Enter the **Server URL**, **Device Name**, your **Username** and **Password**, then select **Login**.

Switch Filter

The **Switch Filter** feature allows you to switch the filter on the database.

Note: Filters are setup from **Mobility** > [Specify Mobile Device Data Filters](#) screen on the PC.

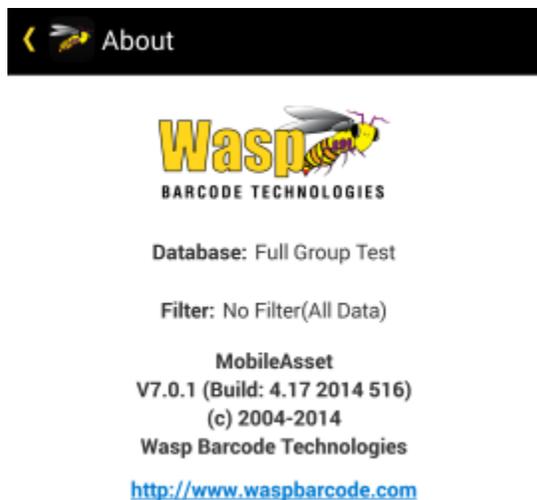
View Server Settings

This option allows you to view the current server settings.



About

Tap the **About** section to view information about the current Database, Filter selection as well as the current version of the MobileAsset app.



Tap **Done** to close the **About** screen.

View Log

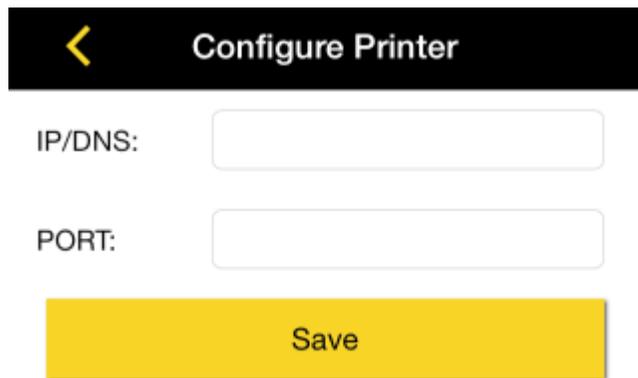
Tap **View Log** to view the MobileAsset log page.

View Crash List

Tap **View Crash List** to view a list of any MobileAsset app crashes.

View Printer Settings

Tap this option to view, setup or change the current label printer settings.



The screenshot shows a mobile application interface for configuring a printer. At the top, there is a black navigation bar with a yellow left-pointing chevron icon and the text "Configure Printer" in white. Below the navigation bar, there are two white input fields with rounded corners. The first field is labeled "IP/DNS:" and the second is labeled "PORT:". Below these fields is a large yellow button with the word "Save" in black text.

On the **Configure Printer** screen enter the following information:

IP/DNS - Enter the IP address of the label printer.

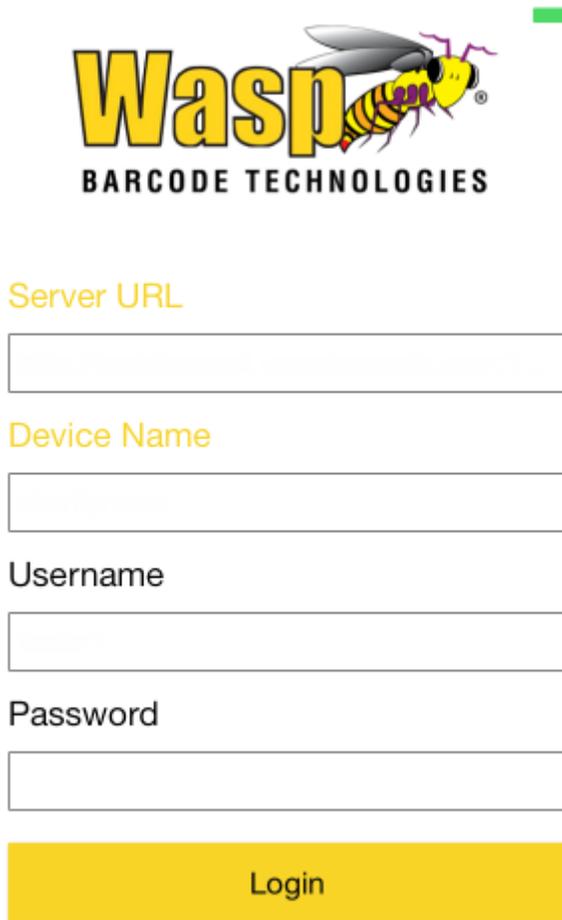
Port - Enter the port the label printer is using.

3.6 iOS Devices

3.6.1 Downloading and Installing MobileAsset on your iOS Device

Professional and Enterprise Editions Only

1. Download and install the Wasp MobileAsset App from the App Store to your mobile device.
2. Click the MobileAsset icon to open the app.
3. The first time you open MobileAsset, the following screen will appear:



Server URL

Device Name

Username

Password

Login

- **Service URL** - This field auto populates based on the IP or FQDN (Fully Qualified Domain Name) detected when you installed MobileAsset on your PC. The **Service URL** is the IP or FQDN followed by the port number for MobileAsset, usually 10008. The **Service URL** is pinned by default. If you need to modify the Service URL, you can unpin it by tapping on the grey field name. This will unpin the field allowing you to edit the URL information.

Example URL: **http://<your IP address>:10008**

- **Device Name** - Enter a unique name here for this mobile device.

If this device has previously been setup on MobileAsset with a different Device Name, a message will appear. Click **Yes** to use the previous name, click **No** to change the device name.

- **User Name** - Enter your MobileAsset user name.
- **Password** - Enter your MobileAsset password.

For more information on logging in to MobileAsset, please refer to the topic [Logging in to MobileAsset on iOS](#).

3.6.2 Logging In to MobileAsset on iOS

Professional and Enterprise Editions Only

When you tap on the MobileAsset icon on your device, the log in screen appears:



Username

Password

Login

Enter your MobileAsset **Username** and **Password**, then tap **Login**.

If you need access to the **Server URL** and **Device Name** fields (seen on the **Log In** screen [the first time it is accessed after installation](#), or when the user selects [Switch Database from the Settings screen](#).), "pinch" anywhere on the **Log In** screen. To pinch the screen, press two fingers to the screen, then move them together in a pinching motion. You will be asked if you want to switch to a different database or a different server. Tap **OK** to access the screen.

3.6.3 Entering or Scanning Information

Professional and Enterprise Editions Only

[Using the Keyboard](#) [Scanning a Barcode](#)

Note: On any field in MobileAsset, you can "pinch" the field to reset it. To pinch the field press two fingers on the field, then move them together in a pinching motion. The value in the field will clear.

Using the Keyboard

Tap in the field into which you want to enter data. The keyboard will appear at the bottom of the screen.

iPhone:



You can close the keyboard at any time by tapping the keyboard icon:



Scanning a Barcode

If you want to scan a barcode, tap the barcode icon.



The scanner feature will open. Hold your device over the barcode. When MobileAsset has successfully read the barcode, the data will appear in the **Asset** field.

You can use the right and left arrow keys at the top of the keyboard to scroll through the fields.

3.6.4 Printing from the MobileAsset App

Professional and Enterprise Editions Only

To print labels from the **New** and **Edit** asset screens in the MobileAsset app, you will need to have your ZPL printer set up on your network. [You will need to select the printer IP and a port.](#)

Printing Receipts

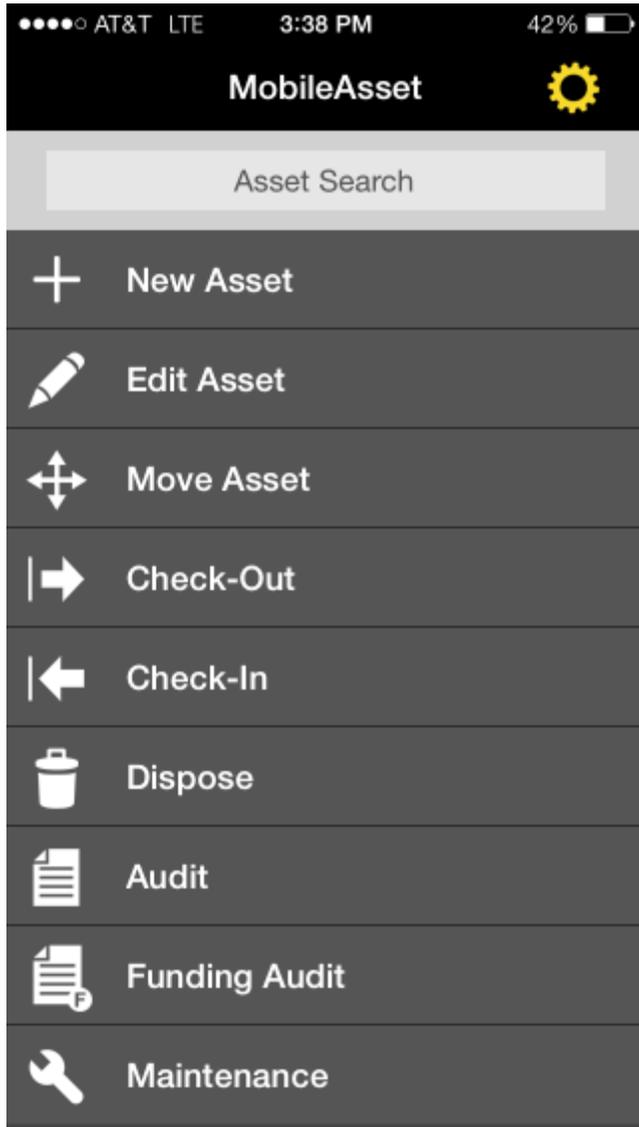
To print receipts from the **Check Out** and **Check In** screens, you will need an airprint compatible printer. Make sure the device is logged into wifi and is on the same subnet with the printer itself.]

3.6.5 iOS Main Menu

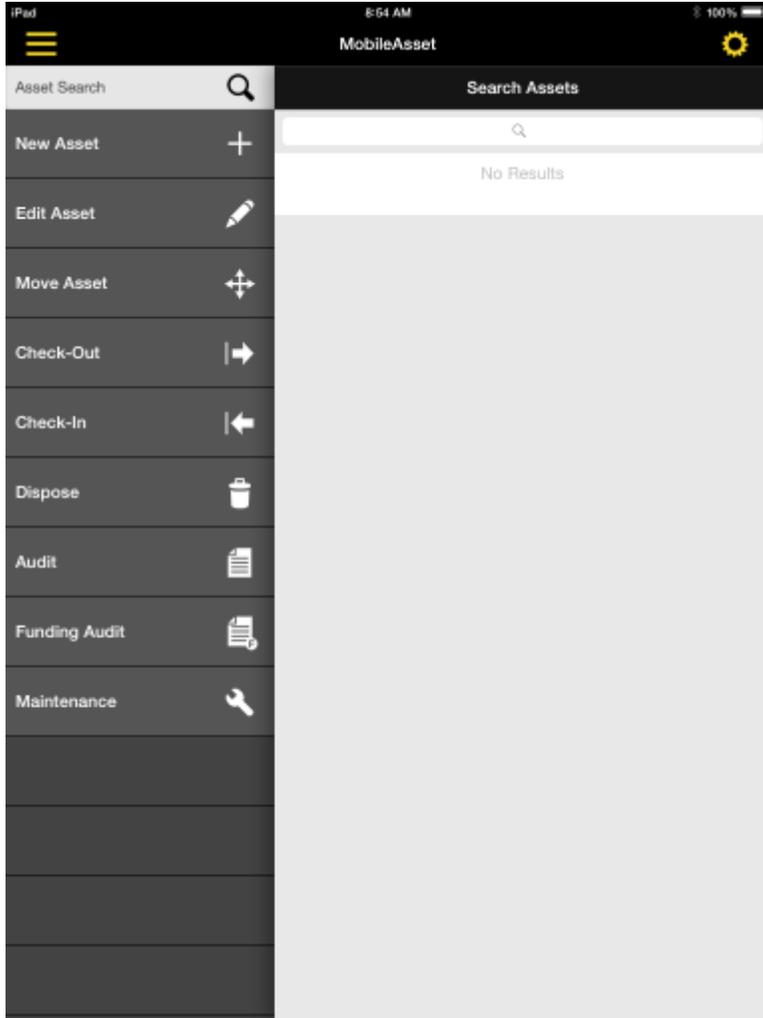
Professional and Enterprise Editions Only

After logging in to MobileAsset, **Main Menu** screen appears:

iPhone



iPad - Note that on the iPad display the search area is already visible when you access the **Main Menu**. Please refer to the topic iOS **Search** feature for instructions on using this feature.



All of the functions available in MobileAsset are available from the **Main Menu**. To open a feature, click on a listing in the menu.

You can display or hide the **Main Menu** by clicking the  icon located in the top, left of most screen.

3.6.6 iOS Add New

Professional and Enterprise Editions Only

You can create new Assets, Asset Tags, Locations, Departments, Manufacturers and Vendors in the MobileAsset app. This new data will be transmitted to the MobileAsset database in real time where it will become available to all devices and on the PC.

The only "Add New" screen that is accessed directly is the **New Asset** screen (accessed from the **Main Menu**). For other new information, you can enter the data in the appropriate field. MobileAsset will recognize the data as new and ask you if you want to add it to the database.

[New Asset](#)

[New Asset Type](#)

[New Location](#)

[New Department](#)

[New Manufacturer](#)

[New Vendor](#)

Sites and **Locations** must be created on the PC.

Other topics that are related to **Adding New** information are:

[Search](#)

[Pinning Data](#)

Note: Most of the screen examples shown in this topic were taken from an iphone. Examples of screens taken from an ipad are provided when they differ from the iphone layout.

New Asset

1. From the **Main Menu**, tap the **New Asset** option. The **Add New** screen appears.

iPhone:

The screenshot shows the 'Add New' screen on an iPhone. The status bar at the top indicates AT&T LTE, 9:51 AM, and 70% battery. The screen has a black header with a hamburger menu icon on the left, 'Add New' in the center, and a gear icon on the right. Below the header is a tab bar with five tabs: 'General' (highlighted in yellow), 'Linking', 'Picture', 'Custom', and 'Type'. The main content area contains the following fields:

- * Asset Tag:
- * Asset Type:
- Description:
- * Site:
- * Location:
- Serial #:
- Department:
- Condition:

At the bottom of the screen are two yellow buttons: 'Summary' and 'Save'.

iPad:

The screenshot shows a mobile application interface for adding a new asset. At the top, there is a black header with the text "Add New". Below this is a horizontal menu with five tabs: "General", "Linking", "Picture", "Custom", and "Type". The "General" tab is selected and highlighted in yellow. The main content area contains a list of input fields:

- * Asset Tag: [text input]
- * Asset Type: [text input] with a magnifying glass icon to its right.
- Description: [text input]
- * Site: [text input] with a magnifying glass icon to its right.
- * Location: [text input] with a magnifying glass icon to its right.
- Serial #: [text input]
- Department: [text input] with a magnifying glass icon to its right.
- Condition: [text input]

At the bottom of the form is a yellow button labeled "Save". Below the form is a dark grey bar with the word "Summary" on the left, a white upward-pointing arrow in the center, and a printer icon on the right.

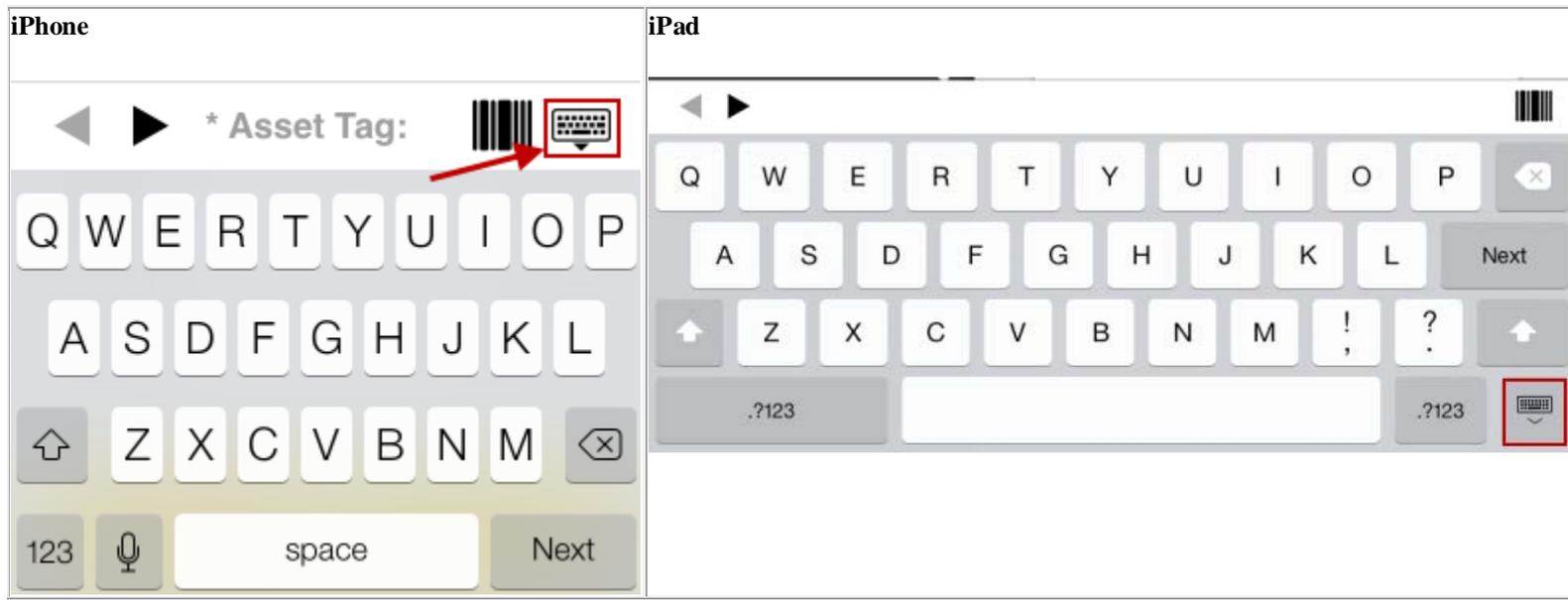
Note: Fields that are preceded by an asterisk (*) are required.

2. Tap in the field into which you want to enter data. The keyboard will appear at the bottom of the screen.

iPhone:



You can close the keyboard at any time by tapping the keyboard icon:



If you want to scan a barcode, tap the barcode icon.



The scanner feature will open. Hold your device over the barcode. When MobileAsset has successfully read the barcode, the data will appear in the **Asset** field.

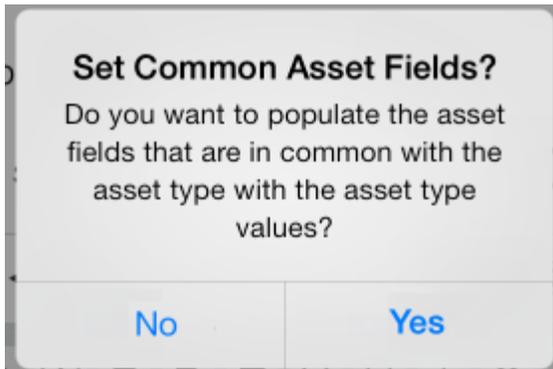
You can use the right and left arrow keys at the top of the keyboard to scroll through the fields.

3. Enter an **Asset Type** for this asset. This is a required field. You can enter a tag into the field using the keyboard, tap the **Scan** icon to scan a barcode, or click the Magnifying Glass icon to access the [Search](#) screen.

You can also add a new **Asset Type** by entering new information in the field. MobileAsset will recognize the

data as new and prompt you to create the new Asset Type. For detailed instructions, please refer to the section **New Asset Type** later in this topic.

- After you select an **Asset Type**, the following screen will appear:



Select **Yes** to populate the fields that appear on the **Type** tab with information from the **Asset Type**.

Select **No** to leave those fields blank.

- Next enter the **Site** and **Location** for this asset following the instructions in step 2. Keep in mind that you cannot create new **Sites** on the mobile device. These will need to be created on the PC.
- You can optionally enter a **Description**, **Serial #**, **Department** and **Condition** for the asset as well.
- The **Linking** tab will be displayed. Tap on the tab label to open it.

General	Linking	Picture	Custom	Type
Asset Tag:	Keyboard			
Transact as Whole	<input checked="" type="checkbox"/>			
Parent Asset:	<input type="text"/>			
Child Assets:				

Asset Linking 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.](#)

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*), enter or scan an asset or tap the Magnifying Glass icon to search for an asset.

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

To associate child assets with this asset (the current asset will be the "parent" of these assets), click the yellow + sign. The **Search Asset** screen will appear displaying all assets in the database. You can search

for an asset by entering a full or partial asset tag or description in the search field and clicking the Magnifying Glass icon. Tap on an asset in the list to link it to the new asset.

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:



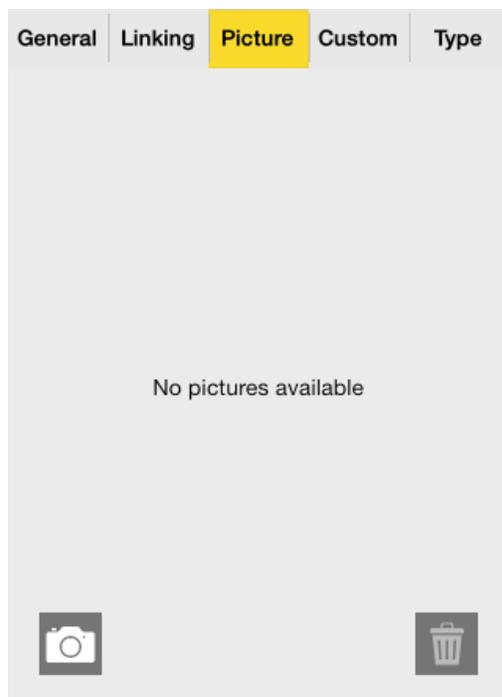
You can unlink the asset by tapping the **Unlink** button.

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 check box. Deselecting it on the **Edit Asset > Asset Linking** tab for the child asset 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 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.

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 software 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.

- 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 or to add a new picture to this asset.



Click the **Camera** icon. A screen will appear asking if you want to take a new picture or browse for a picture on your device.



Open Camera - Select this option to access the camera feature on your device. Take the picture as you normally would on your device, then select **Use this image**, or **Retake** to discard the current picture and take another. When you select **Use this Image** the image will be displayed on the **Picture** tab. Images taken via the camera through the MobileAsset app are not saved to your device. They are transmitted to the MobileAsset database.

Choose from Photos - Select this option to browse for a picture on your device.

When you select or take a photo, it will appear in the **Picture** tab.



Click the Trash can icon to delete the image.

The number of pictures you can attach to an asset is limited by the number set in [Options > Maximum Pictures Captured](#). The default number of captures is 5.

Note: After uploading data to the PC, any pictures taken via the iOS app will appear as attachments on the

[Edit Asset screen > Attachment tab](#). Pictures taken via the iOS app will not appear on the **Edit Asset screen > Picture tab** by default. You can set an image as default to have it appear on the **Picture** tab by following the instructions provided in the topic [New Asset screen > Picture tab](#).

9. The **Custom** tab displays any custom fields, either static or dynamic, set up on the PC.

For more information on these fields, please refer to the topics [Using Custom Fields](#) and [Using Dynamic Custom Fields](#).

An example of the **Custom** tab displaying both types of custom fields is shown below:

General	Linking	Picture	Custom	Type
Static Fields				
* Date Purchased:	<input type="text"/>			
* Asset Value:	<input type="text"/>			
* Asset Category:	<input type="text"/>			
Dynamic Fields				
DCF Number:	<input type="text"/>			
Warranty End Date:	<input type="text"/>			

If any of the fields are set to be required, they will appear with an asterisk (*) in front of them. You must complete all required custom fields before you can save the asset.

Click the Magnifying icon next to each field to view any **Predefined** values as well as recently used values.

10. The **Type** tab contains information related to the **Asset Type** such as depreciation and Asset Length. If you selected to set common asset fields in Step 4, the fields on this tab will be populated with data from the asset type. In addition, if the [Edit Inherited Asset Type data option](#) is turned off, any of the fields that are in common with the **Asset Type** will not be editable, even if they are blank.

If **Depreciation** is not set for the **Asset Type** associated with the asset, you will not be able to select a **Depr. Class** here. Depreciation can be set for an Asset Type on the PC only.

General	Linking	Picture	Custom	Type
Depr.Class:		<input type="text"/>		
Category:		<input type="text"/>		
Manufacturer:		<input type="text"/>		
Model #:		<input type="text"/>		
Vendor:		<input type="text"/>		
C.O. Length:	Day(s)	Hr(s)	Min(s)	
	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	
Lead Time:	Day(s)	Hr(s)	Min(s)	
	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	

Enter information on this screen as needed. Keep in mind that if you enter a new manufacturer and/or vendor here, you will be given the opportunity to add them to your database. For more information see **Add New Manufacturer** and **Add New Vendor** later in this topic.

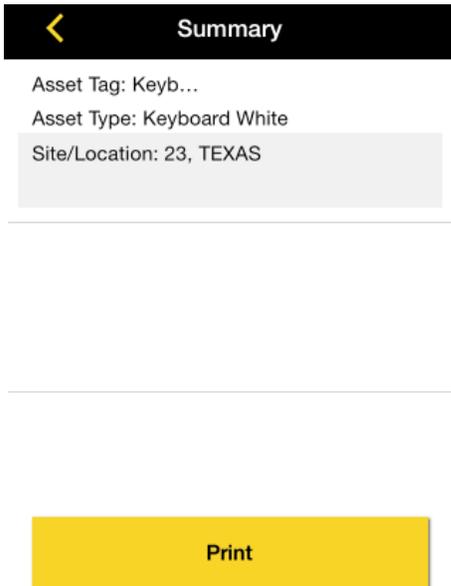
- When you are finished entering information for this asset, tap the **Save** button at the bottom of the screen.

iPhone Summary Screen:

Notice that after you select **Save**, a number appears next to the **Summary** button.



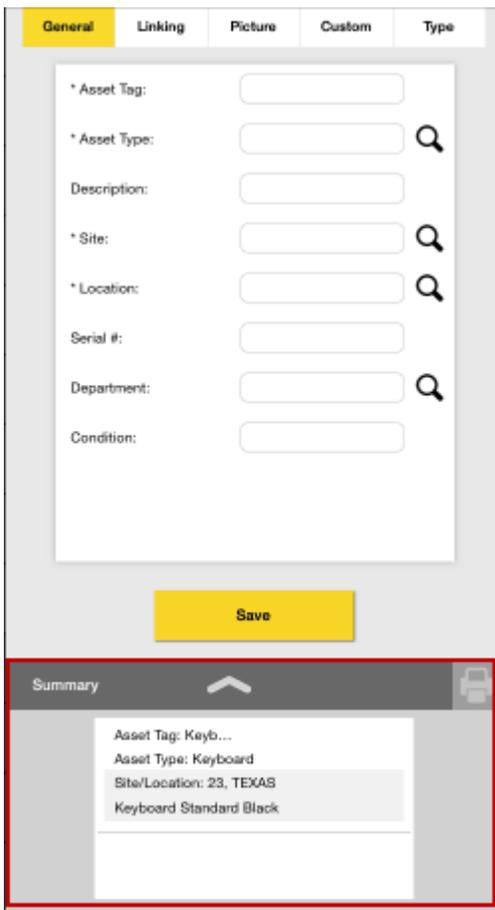
This indicates how many assets you have created during this session. Tap the **Summary** button to view the summary information. Details of each asset you have added this session will display:



Tap the **Print** icon to print labels for these assets. The labels will print to your ZPL printer that is on your network. For information on printing from iOS, please refer to the topic [Printing from the MobileAsset App](#).

iPad Summary Screen:

After you select **Save**, the **Summary** will appear at the bottom of the screen as shown below:

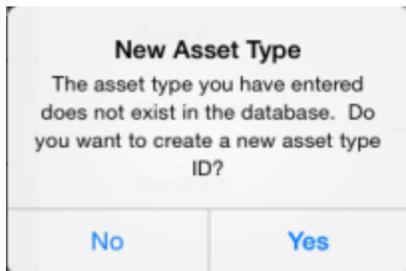


Tap the up arrow at the top of the **Summary** to expand it.

Tap the **Print** icon to print labels for these assets. The labels will print to your ZPL printer that is on your network. For information on printing from iOS, please refer to the topic [Printing from the MobileAsset App in iOS](#).

New Asset Type

1. When you enter new data into the **Asset Type** field MobileAsset will recognize it as new and the following prompt will appear:



2. Tap **Yes** to access the **New Asset Type** screen.

3. Enter information in the following fields:

- **Asset Type** - This field is required. The asset type is a category for assets and is required to create new asset types. 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. Asset Tags must be unique across all Sites and Locations. A particular value can occur only once in the Asset database.
- **Asset Type Description** - Enter a description for this **Asset Type**.
- **Depr Class** and **Category** are optional fields. A selection can be made from any previously defined values found on the search screen or you can create a new Class or Category by entering new information in the field..

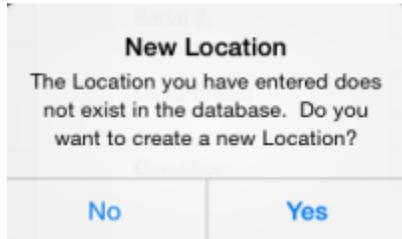
MobileAsset can perform depreciation calculations at the PC for any Depreciation Class assigned to asset types for which that option has been enabled. The mobile device does not distinguish those Depreciation Classes for which depreciation has been enabled from those where it has not. If you define a new Depreciation Class on the mobile device for which depreciation should be calculated, the option will have to be enabled for that Depreciation Class. [Click here for information on enabling depreciation.](#)

- **Manufacturer** - Scan a manufacturer or tap the Magnifying Glass icon to search manufacturers. You can create a new manufacturer by entering new information in the field.
- **Vendor** - Scan a manufacturer or tap the Magnifying Glass icon to search manufacturers. You can create a new manufacturer by entering new information in the field.
- **CO Length** - The default number of Days, Hours or Minutes the asset type may remain checked out before it is overdue.
- **Lead Time** - Indicates how long after an asset is checked in before it is available. The lead time allows time for recalibration, cleaning, etc.

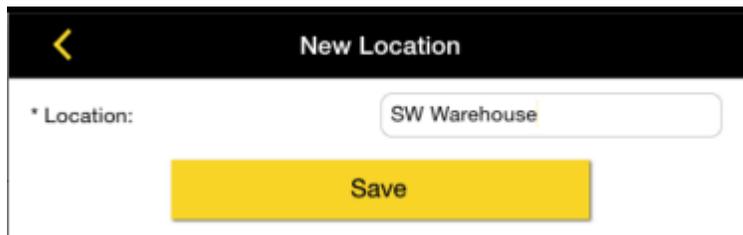
4. Tap the **Save** button when you are done. You will be returned to the screen on which you were previously working.
-

New Location

1. When you enter new data into the **Location** field MobileAsset will recognize it as new and the following prompt will appear:



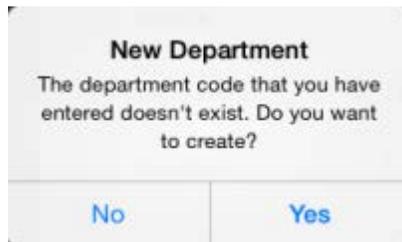
2. Click **Yes** on the prompt to access the **New Location** screen.



3. Make sure the **Location** is entered correctly, then tap the **Save** button. You will returned to the screen you were previously working on.
-

New Department

1. When you enter new data into the **Department** field MobileAsset will recognize it as new and the following prompt will appear:



- Click **Yes** to access the **New Department** screen.

- Enter the **Department Code** and **Department Name**, then click the **Save** button.
-

New Manufacturer

- When you enter new data into the **Manufacturer** field MobileAsset will recognize it as new and the following prompt will appear:

- Click **Yes** on this prompt to save the new manufacturer. If you need to add additional data to this manufacturer, such as address and phone information, you will need to do so on the PC.
-

New Vendor

- When you enter new data into the **Vendor** field MobileAsset will recognize it as new and the following prompt will appear:

- Click **Yes** on the prompt to access the **New Vendor** screen.

< New Vendor

* Vendor: MO221

Vendor Name:

Save

Enter the **Vendor** code and the **Vendor Name** (optional), then click the **Save** button.

3.6.7 iOS Pinning

Professional and Enterprise Editions Only

Many fields can be "Pinned" in MobileAsset, allowing for faster data entry. For instance, if you are adding multiple new assets to one Asset Type at a specific Site and Location, you can select information in those fields once, then "pin" the fields. This allows you to quickly create new assets without having to re-enter the Asset Type, Site and Location each time.

To Pin a Field

Press and hold the label of the field you want to pin. The field label will turn yellow and the **Search** icon will disappear, indicating it is pinned.

In the example below we have pinned the **Asset Type**, **Site** and **Location** fields.

The screenshot shows the 'Add New' form in the MobileAsset app. The status bar at the top indicates AT&T LTE, 11:27 AM, and 57% battery. The app header includes a menu icon, the title 'Add New', and a settings gear icon. Below the header are five tabs: 'General' (highlighted in yellow), 'Linking', 'Picture', 'Custom', and 'Type'. The form contains the following fields:

- * Asset Tag: Keyboard
- * Asset Type: Keyboard (pinned, label is yellow)
- Description: keyboard stand...
- * Site: 23 (pinned, label is yellow)
- * Location: TEXAS (pinned, label is yellow)
- Serial #:
- Department: (with a search icon to its right)
- Condition:

At the bottom of the form are two yellow buttons: 'Summary' and 'Save+'.

To Unpin a Field

Press and hold the field label until the label returns to black and the search icon reappears.

3.6.8 iOS Search

Professional and Enterprise Editions Only

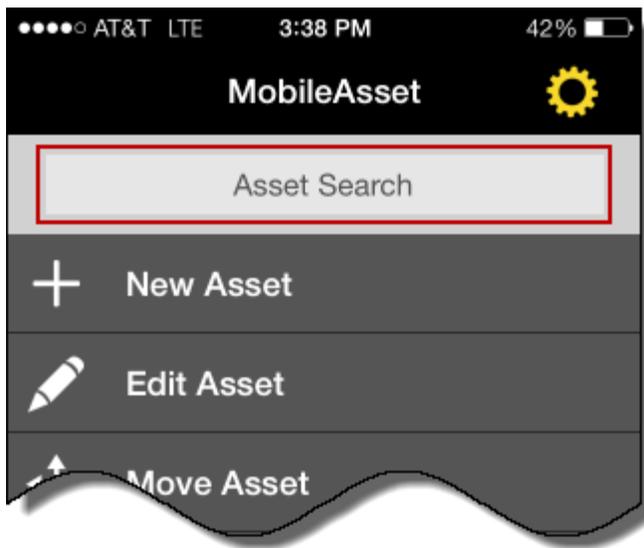
You can search for a variety of information in MobileAsset using the **Search** screens. Anywhere you see a Magnifying Glass icon next to a field, you can click on the icon to access the search screen. The searchable data is limited to field. For instance, if you click the Magnifying Glass icon next to the Asset Type field, the search screen will only search for Asset Types.

1. Click the Magnifying Glass icon next to a field.

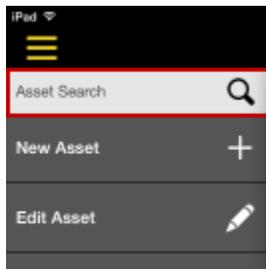
* Asset Type: 

Note: The **Asset Search** option is available from the **Main Menu**:

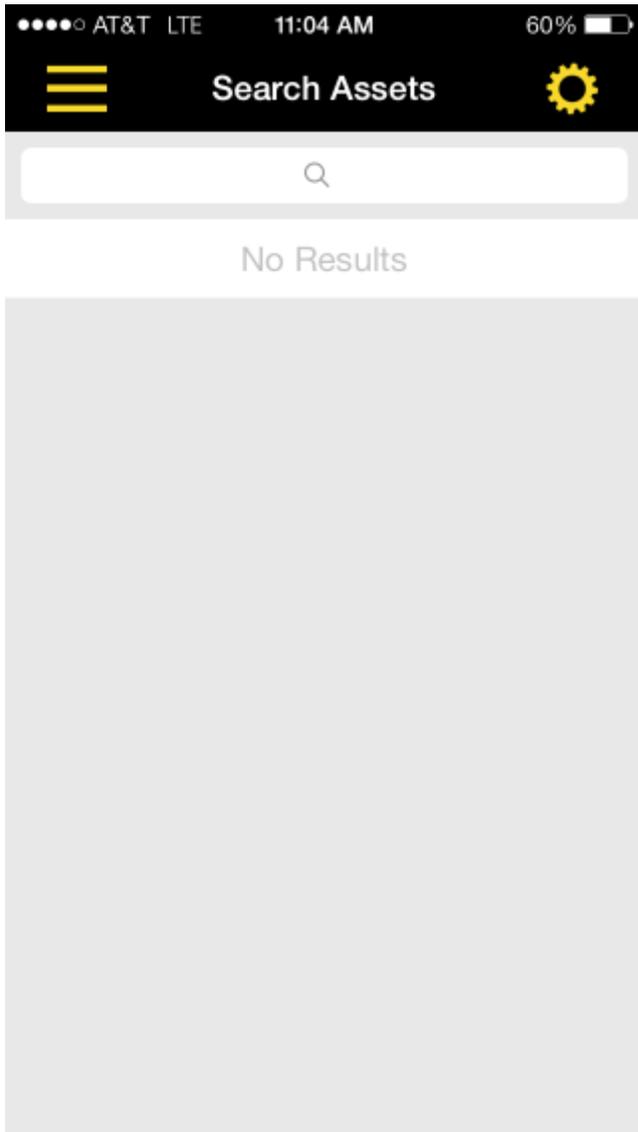
iPhone:



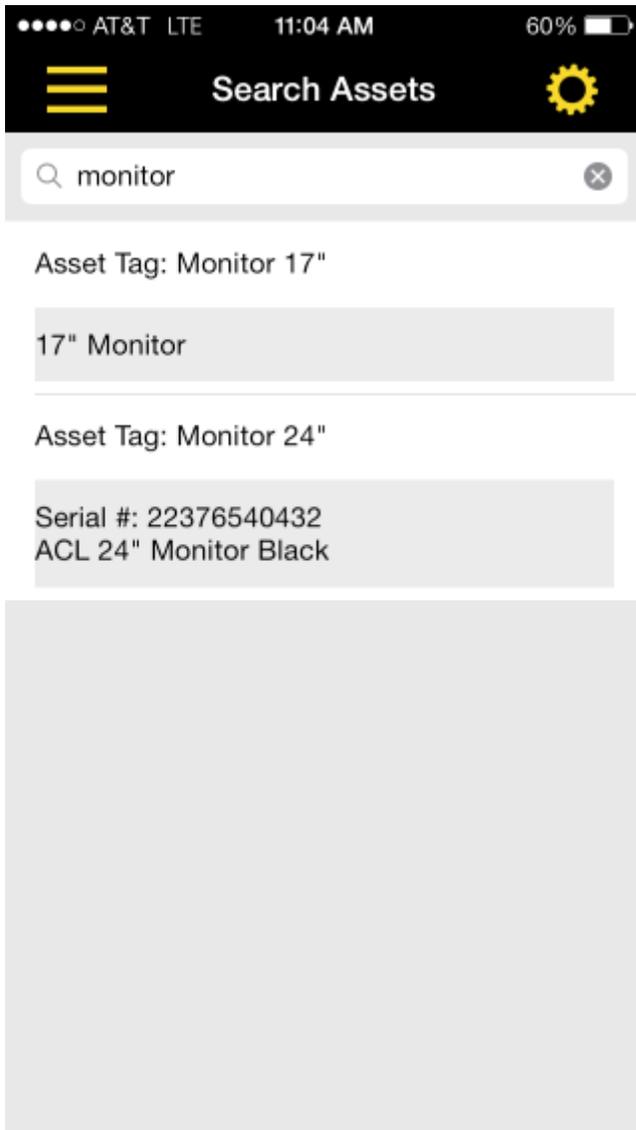
iPad:



The appropriate **Search** screen appears. In this example we have accessed the **Asset Search**:



Tap in the text field at the top of the screen to access the keyboard, then type in a full or partial name, asset tag, etc. Click the Magnifying glass icon when you are done entering information. Search results will appear on the screen.



2. Tap on a listing in the search results to select it.

3.6.9 iOS Edit Asset

Professional and Enterprise Editions Only

This feature allows you to edit an existing asset.

Note: The screen examples shown in this topic were taken from an iPhone. The **Edit** screen on the iPad is identical in look and functionality.

1. From the **Main Menu** tap **Edit Asset**. The **Edit** screen appears.

2. This screen is divided into two sections containing search options. Select how you want to search for the asset you need to edit.

Your options are:

Search by Tag - Scan, enter using the keyboard or [Search](#) for an existing asset tag. On the Search screen, enter a full or partial tag, then tap the Magnifying Glass icon. Tap the asset you want to edit in the Search results. The **Edit** screen will appear (see example in Step 3).

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Search by Site and Location - Scan, enter using the keyboard or [Search](#) for a **Site** and/or a **Location**. A list of assets located at the specified **Site/Location** will appear.

Edit

Search by Tag

Asset Tag: 

Search by Site and Location

Site: 

Location: 

Keyboard 
keyboard standard black

Monitor 17" 
17" Monitor

Monitor 24" 
ACL 24" Monitor Black

Monitor 32" 
ACL Monitor 32" Black

3. Tap on the asset you want to edit. The **Edit** screen will appear:

The screenshot shows the 'Edit' screen for an asset. At the top, there is a black header with a menu icon on the left, the word 'Edit' in the center, and a gear icon on the right. Below the header is a horizontal tab bar with five tabs: 'General', 'Linking', 'Picture', 'Custom', and 'Type'. The 'General' tab is highlighted in yellow. The main content area contains several form fields, each with a label and a text input box. The fields are: '* Asset Tag' with the value 'Monitor 32"', '* Asset Type' with the value '32" Monitor' and a magnifying glass icon to its right, 'Description' with the value 'ACL Monitor 3...', '* Site' with the value '23' and a magnifying glass icon to its right, '* Location' with the value 'TEXAS' and a magnifying glass icon to its right, 'Serial #' with the value 'SE2385940', 'Department' with an empty text box and a magnifying glass icon to its right, and 'Condition' with the value 'Excellent'. At the bottom of the screen, there are two large yellow buttons: 'Print' on the left and 'Update' on the right.

4. Make changes as necessary to the asset.
5. If you want to print a label for this asset, tap the **Print** button.
6. When you are finished, tap the **Update** button.

3.6.10 iOS Move Asset

Professional and Enterprise Editions Only

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

Note: The screen examples shown in this topic were taken from an iPhone. The **Move** screen on the iPad is identical in look and functionality.

1. From the **Main Menu**, tap **Move Asset**. The **Move** screen appears:

The screenshot shows the 'Move' screen with the following fields and icons:

- To Site:** Input field with a magnifying glass icon.
- To Location:** Input field with a magnifying glass icon.
- Asset Tag:** Input field with a magnifying glass icon.
- Description:** Input field.
- From Site:** Input field.
- From Location:** Input field.

At the bottom of the screen is a large yellow button labeled **Move**.

2. Scan, enter using the keyboard or [Search](#) for a **To Site**. This is the site to which you are moving the asset.
3. Scan, enter using the keyboard or [Search](#) for a **To Location**. This is the location to which you are moving the asset. The results on the search screen will be limited to locations within the selected site.
4. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**. The **Description**, **From Site** and **From Location** will populate with information from the selected **Asset Tag**.

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [iOS Pinning Data](#).

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

5. When you have entered your selections, tap the **Move** button.

3.6.11 iOS Check Out

Professional and Enterprise Editions Only

The **Check Out Asset** transaction provides the ability to check-out assets to a customer or employee, specifying a Due Date and Due Time by which the asset should be checked-in.

You have two options for checking out assets, **Advanced** and **Quick**.

Advanced check out allows you to check out a number assets to an employee or customer, then view the **Summary** screen where you can collect a signature and/or print a receipt.

Quick check out can be used when you have many assets you want to check out to different customers/employees without worrying about gathering signatures on each one. This mode allows you to select a customer or employee and check out the asset without having to collect signatures or view the summary screen for each transaction.

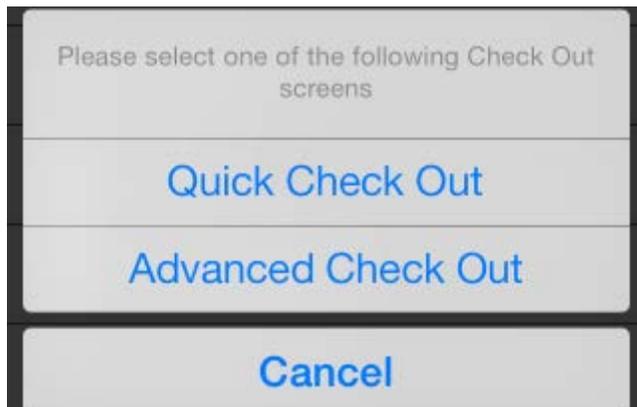
Note: Quick check out is not available if the [Require a Signature on Device is set to Yes on the Options screen](#).

[Advanced Check Out](#)

[Quick Check Out](#)

Advanced Check Out

1. From the **Main Menu** tap **Check Out**. If this is the first time you have accessed this feature the **Check Out** popup menu will appear:



Select **Advanced Check Out**.

The **Advanced Check Out** screen appears.

Note: The popup menu does not automatically appear on subsequent taps. To change from **Quick** check out to **Advanced** check out or vice-versa, press and hold the **Check Out** menu option. The pop up menu will appear asking if you want **Advanced** or **Quick** check out.

- Assets can be checked out to customers or to employees. By default, the **Check Out** screen is set to **Customer #**. You can switch to **Employee #** by double tapping on the **Customer #** label. A screen will appear allowing you to select **Customer #** or **Employee #**.



Tap **Employee #** or **Customer #** on this screen.

The **Check Out** screen will show your change.

3. Scan, enter using the keyboard or [Search](#) for an **Employee** or **Customer**.

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [iOS Pinning Data](#).

4. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**.

The **Description**, Site and Location fields will populate when you select the **Asset Tag**.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

5. The **Due Date** will default to **Use CO Length**, if a check out length was set for this asset type. The default can be accepted or overwritten if necessary. To change the **Due Date**, tap in the field. The options will appear at the bottom of the screen. Tap on an option to select it.

Due Date:

◀ ▶ 

Use CO Length

No Due Date

Custom

Due Date options are:

Use CO Length - This uses the check out duration set for the asset type. The Date and Time will be calculate and displayed.

No Due Date - This mean the asset will not have a due date set.

Custom - Use this option to set a new due date and time. When this option is selected, the Date and Time selector appears:

Due Date:

Date:

◀ ▶ 

Sat Apr 12	7	34	
Sun Apr 13	8	35	
Mon Apr 14	9	36	
Today	10	37	AM
Wed Apr 16	11	38	PM
Thu Apr 17	12	39	
Fri Apr 18	1	40	

Scroll through the date and time rollers to select the check out due date and time.

- (MobileAsset Web Users Only)** If you have created a **Reservation** on MobileAsset Web, you will see the **Reservation** field (shown below).

The **Reservation** field displays a drop down list of reservations to which the current asset is tied. Select the reservation from the drop down list for which you want to check out this asset. If you are creating a

reservation for the same period for a customer other than the one listed in the reservation, you will receive a warning message.

Tap **OK** on the warning message to continue checking out the asset despite the overlapping period, or click **No** to cancel the check out process.

When you sync the data back to the PC, MobileAsset Web will be updated with the new check out information. The status of the selected reservation will be updated to completed.

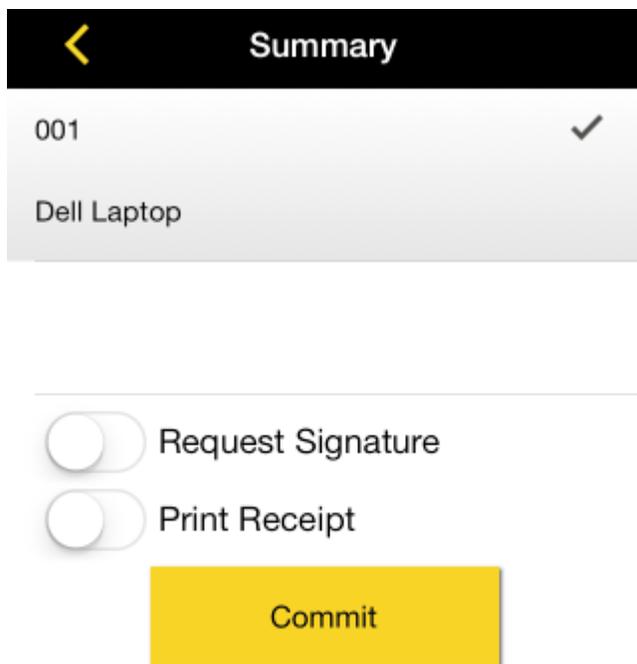
7. When you are finished entering information for this asset, tap the **Check Out** button at the bottom of the screen.

iPhone Summary Screen:

Notice that after you select **Check Out**, a number appears next to the **Finish** button.

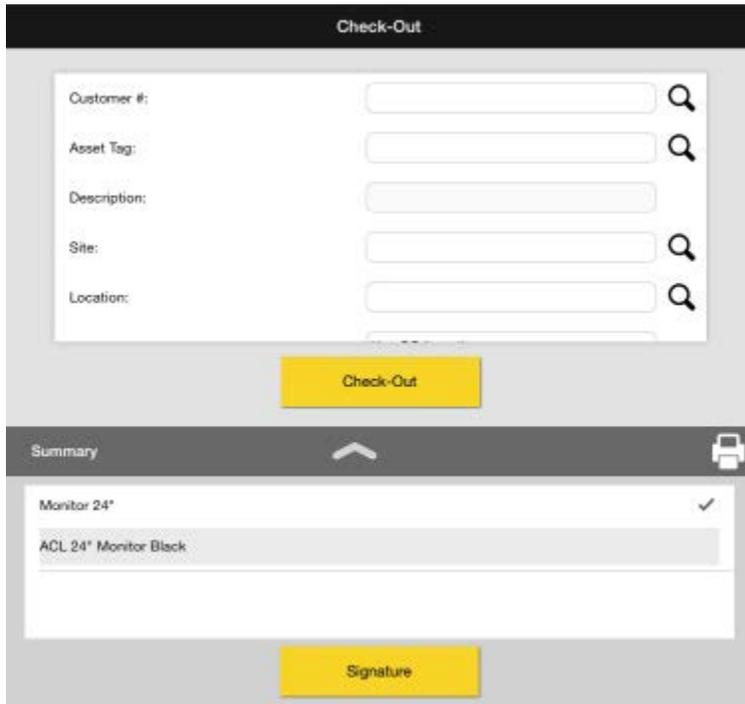


This indicates how many assets you have checked out to the customer/employee during this session. Tap the **Finish** button to view the summary information. Details of each asset you have checked out will display:



iPad Summary Screen:

After you select **Check Out**, the **Summary** will appear at the bottom of the screen as shown below:

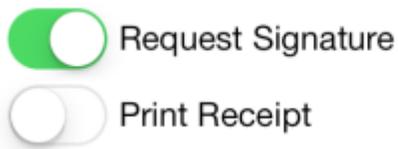


Tap the up arrow at the top of the **Summary** to expand it.

- Depending on the MobileAsset PC options, you may be prompted to obtain a signature or a signature may be required.

If you are prompted to obtain a signature, tap **Yes** on the prompt screen.

If you are not prompted but want to add a signature or print a receipt, slide the **Signature** and/or Print radio buttons to the left. The options will appear green when they are enabled:

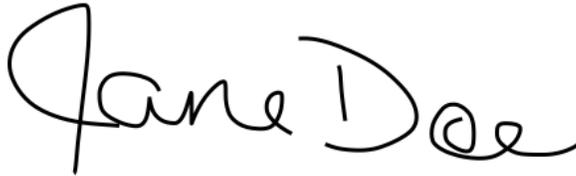
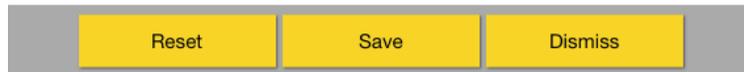


- Click the **Commit** button.

If you have enabled collecting a signature, the signature screen appears:



Have the employee or customer sign on the line using their fingertip.

If you are satisfied with the signature, tap **Save**. If you want to erase the current signature and try again, tap **Reset**. To close the **Signature** screen without saving the signature, tap **Dismiss**.

The signature is saved on the device until the next data upload to the PC. Once it is uploaded to the PC, you can view it by going to the **Transactions List (Main > List Forms > Transactions)** highlighting the desired transaction and clicking the Signature button. Only those transactions with a Pen icon next to them contain signature captures.

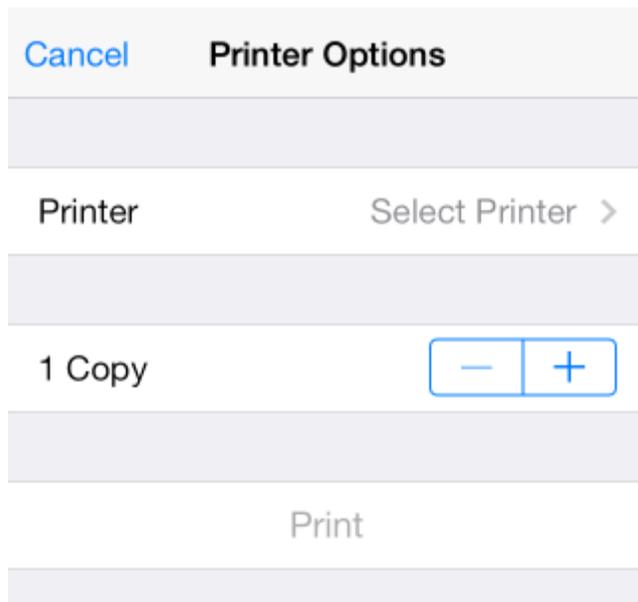
Transaction List						
Tools						
Filter	Toggle	Print	Export	Group	Hidden	Views
						Signature
						Reprint Receipt
Trans Date	Trans Type	Asset Tag	Department	Location	Site	
4/9/2014	Check In	4003	IT	Storage Rm A	Main Office	
4/9/2014	Check In	1546	GR	Shf6 Bin7	Bldg 2	
4/9/2014	Check In	4000	IT	Storage Rm A	Main Office	
4/9/2014	Check In	1002	GR	Storage Rm A	Main Office	
4/9/2014	Check In	1		Sh1b2	001	
4/9/2014	Check Out	1002	GR	Storage Rm A	Main Office	
4/9/2014	Check Out	4003	IT	Storage Rm A	Main Office	
4/9/2014	Check In	4001	IT	Storage Rm A	Main Office	
4/9/2014	Check Out	4001	IT	Storage Rm A	Main Office	
4/9/2014	Check In	4000	IT	Storage Rm A	Main Office	
4/9/2014	Check In	1002			Main Office	

When the **Signature** button is clicked, the **View Signature** screen appears.



Click the Red X in the upper, right corner to close the **View Signature** screen.

If you have enabled printing a receipt, the Print Options screen will appear. For information on printing from iOS, please refer to the topic [Printing from the MobileAsset App](#). You can re-print the check out receipt by highlighting the check out transaction, then clicking the **Reprint Receipt** button.



Tap **Select Printer** to see a list of airprint capable printers on your network. Select a **Printer**, then tap the - and + icons to enter the number of copies you want to print.

Tap **Print** after you have made your selections.

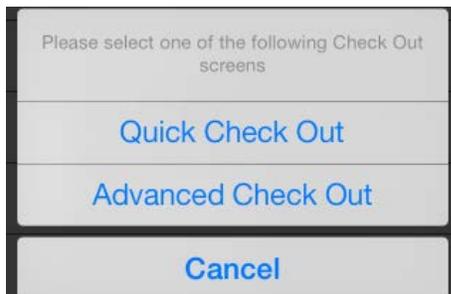
After collecting a signature and printing a receipt the session is closed and you will be returned to the blank check out screen.

Quick Check Out

1. From the **Main** menu, tap **Check Out**. If this is the first time you have accessed the Check Out function, a pop up menu will appear asking if you want **Advanced** or **Quick** check out.

Note: The popup menu does not automatically appear on subsequent taps. To change from **Quick** check out to **Advanced** check out or vice-versa, press and hold the **Check Out** menu option. The pop up menu will appear asking if you want **Advanced** or **Quick** check out.

Select **Quick Check Out**.



The Check Out screen appears:

 A screenshot of the "Check Out" screen in a mobile application. The screen has a black header bar containing a white menu icon (three horizontal lines), the text "Check Out" in white, and a yellow gear icon. Below the header, there are several input fields:

- "Customer #:" followed by a white text input field and a magnifying glass search icon.
- "Asset Tag:" followed by a white text input field and a magnifying glass search icon.
- "Description:" followed by a white text input field.
- "Site:" followed by a white text input field.
- "Location:" followed by a white text input field.
- "Due Date:" followed by a white dropdown menu showing "Use CO Length".

 Below these fields, the text "No Due Date" is displayed. At the bottom of the screen, there is a large yellow rectangular button with the text "Check Out" in black.

Assets can be checked out to customers or to employees. By default, the **Check Out** screen is set to

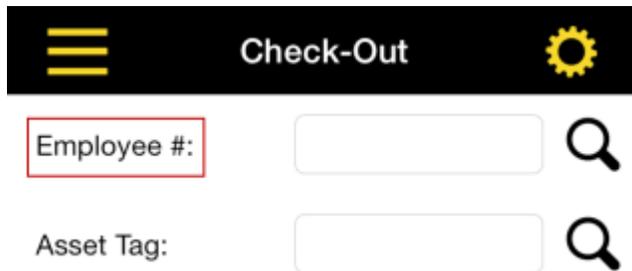
Customer #. You can switch to **Employee #** by double tapping on the **Customer #** label. A screen will appear allowing you to select **Customer #** or **Employee #**.



Tap **Employee #** or **Customer #** on this screen.



The **Check Out** screen will show your change.



2. Scan, enter using the keyboard or [Search](#) for an **Employee** or **Customer**.

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [iOS Pinning Data](#).

3. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**.

The **Description**, Site and Location fields will populate when you select the **Asset Tag**.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

- The **Due Date** will default to **Use CO Length**, if a check out length was set for this asset type. The default can be accepted or overwritten if necessary. To change the **Due Date**, tap in the field. The options will appear at the bottom of the screen. Tap on an option to select it.

Due Date:

◀ ▶ 

Use CO Length

No Due Date

Custom

Due Date options are:

Use CO Length - This uses the check out duration set for the asset type. The Date and Time will be calculate and displayed.

No Due Date - This mean the asset will not have a due date set.

Custom - Use this option to set a new due date and time. When this option is selected, the Date and Time selector appears:

Due Date:

Date:

◀ ▶

⌨

Sat Apr 12	7	34	
Sun Apr 13	8	35	
Mon Apr 14	9	36	
Today	10	37	AM
Wed Apr 16	11	38	PM
Thu Apr 17	12	39	
Fri Apr 18	1	40	

Scroll through the date and time rollers to select the check out due date and time.

5. **(MobileAsset Web Users Only)** If you have created a **Reservation** on MobileAsset Web, you will see the **Reservation** field (shown below).

The **Reservation** field displays a drop down list of reservations to which the current asset is tied. Select the reservation from the drop down list for which you want to check out this asset. If you are creating a reservation for the same period for a customer other than the one listed in the reservation, you will receive a warning message.

Tap **OK** on the warning message to continue checking out the asset despite the overlapping period, or click **No** to cancel the check out process.

When you sync the data back to the PC, MobileAsset Web will be updated with the new check out information. The status of the selected reservation will be updated to completed.

6. When you are finished entering information for this asset, tap the **Check Out** button at the bottom of the screen.

3.6.12 iOS Check In

Professional and Enterprise Editions Only

The **Check In Asset** transaction provides the ability to check in assets currently checked out to a customer or employee.

You have two options for checking in assets, **Advanced** and **Quick**.

Advanced check in allows you to check in a number assets from an employee or customer, then view the **Summary** screen where you can collect a signature and/or print a receipt.

Quick check in can be used when you have many assets you want to check in from different customers or employees without worrying about gathering signatures on each one. This mode allows you to select a customer or employee and check in the asset without having to collect signatures or view the summary screen for each transaction.

[Advanced Check In](#) [Quick Check In](#)

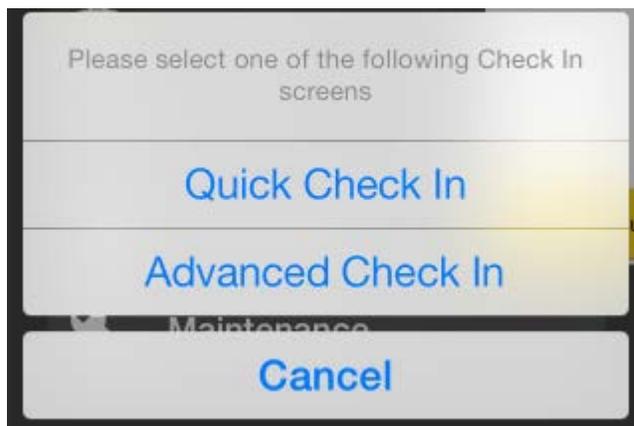
Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [iOS Pinning Data](#).

Note: Most of the screen examples shown in this topic were taken from an iphone. Examples of screens taken from an ipad are provided when they differ from the iphone layout.

Advanced Check In

1. From the **Main Menu** tap **Check In** . If this is the first time you have accessed this feature the **Check In** popup menu will appear. **Note:** The popup menu does not automatically appear on subsequent taps. To change from **Quick** check out to **Advanced** check in or vice-versa, press and hold the **Check In** menu option. The pop up menu will appear asking if you want **Advanced** or **Quick** check in.

Select **Advanced Check In**.



The **Check In** screen appears:

2. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**.

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#). The **Description**, **Site** and **Location** will populate based on the **Asset Tag** entered. You can also scan, enter or search for a **Site** and **Location**.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

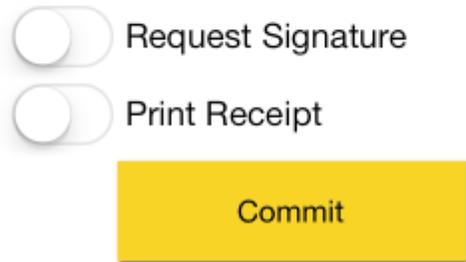
3. When you are done entering information tap the **Check In** button.

iPhone Summary Screen:

Notice that after you select **Check In**, a number appears next to the **Finish** button.



This indicates how many assets you have checked in during this session. Tap the **Finish** button to view the summary information. Details of each asset you have checked in will display:



iPad Summary Screen:

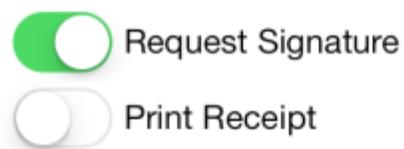
After you select **Check In**, the **Summary** will appear at the bottom of the screen as shown below:

Tap the up arrow at the top of the **Summary** to expand it.

- Depending on the MobileAsset PC options, you may be prompted to obtain a signature or a signature may be required.

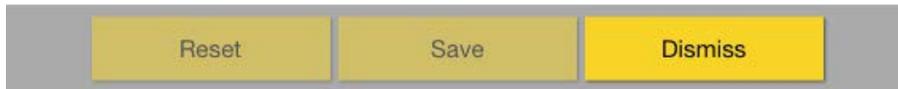
If you are prompted to obtain a signature, tap **Yes** on the prompt screen.

If you are not prompted but want to add a signature or print a receipt, slide the **Signature** and/or Print radio buttons to the left. The options will appear green when they are enabled:



- Click the **Commit** button.

If you have enabled collecting a signature, the signature screen appears:



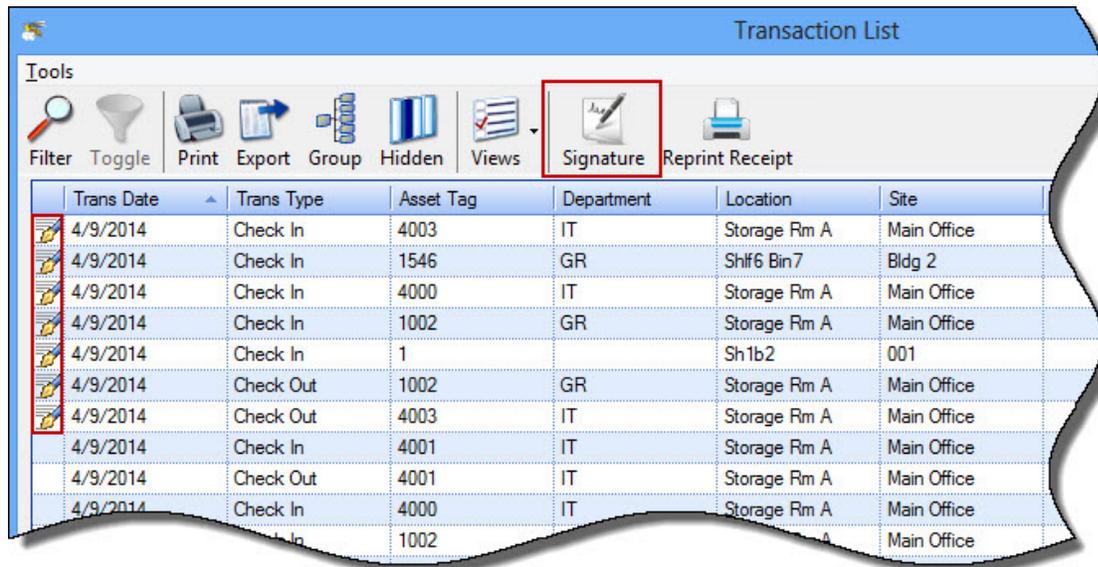
Have the employee or customer sign on the line using their fingertip.

A handwritten signature in black ink that reads "Jane Doe".



If you are satisfied with the signature, tap **Save**. If you want to erase the current signature and try again, tap **Reset**. To close the **Signature** screen without saving the signature, tap **Dismiss**.

The signature is saved on the device until the next data upload to the PC. Once it is uploaded to the PC, you can view it by going to the **Transactions List (Main > List Forms > Transactions)** highlighting the desired transaction and clicking the **Signature** button. Only those transactions with a **Pen** icon next to them contain signature captures.

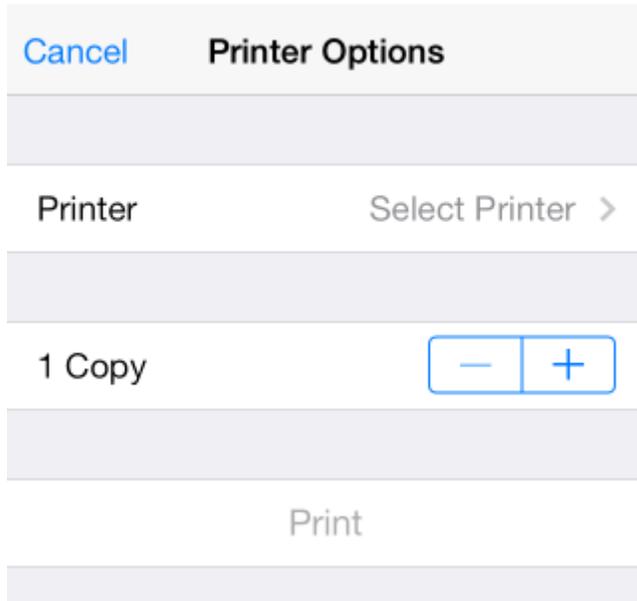


When the **Signature** button is clicked, the **View Signature** screen appears.



Click the Red X in the upper, right corner to close the **View Signature** screen.

If you enabled printing a receipt, the Printer Options screen appears. For information on printing from iOS, please refer to the topic [Printing from the MobileAsset App](#). You can re-print the check in receipt by highlighting the check in transaction, then clicking the **Reprint Receipt** button.



Tap **Select Printer** to see a list of airprint capable printers on your network. Select a **Printer**, then tap the - and + icons to enter the number of copies you want to print.

Tap **Print** after you have made your selections.

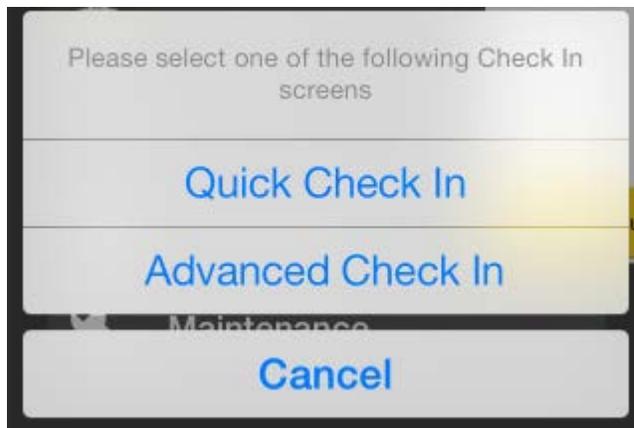
After collecting a signature and printing a receipt the session is closed and you will be returned to the blank check in screen.

Quick Check In

1. From the **Main** menu, tap **Check Out**. If this is the first time you have accessed the Check Out function, a pop up menu will appear asking if you want **Advanced** or **Quick** check out.

Note: The popup menu does not automatically appear on subsequent taps. To change from **Quick** check in to **Advanced** check in or vice-versa, press and hold the **Check In** menu option. The pop up menu will appear asking if you want **Advanced** or **Quick** check in.

Select **Quick Check In**:



The **Check In** screen appears:

2. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**.

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#). The **Description**, **Site** and **Location** will populate based on the **Asset Tag** entered. You can also scan, enter or search for a **Site** and **Location**.

Note for MobileAsset Professional and Enterprise edition users: If you have installed the Professional or Enterprise edition of MobileAsset and are using asset linking, the system will check for the **Transact as Whole** flag. If the flag is turned on for this asset (or the parent of this asset), a message will appear notifying you. You can either leave the flag on to perform the transaction on the entire group of linked assets, or select to turn the flag off to perform the transaction only on this asset.

What is Transact as Whole? When an asset is set to "Transact as whole" (on the New/Edit Asset screen > Linking tab) 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 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 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.

3. When you are done entering information tap the **Check In** button.

3.6.13 iOS Dispose

Professional and Enterprise Editions Only

The **Dispose** transaction is used to remove an asset from the 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. From the **Main Menu** tap **Dispose**. The **Dispose** screen appears:



2. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**.

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

The **Description**, **Site** and **Location** fields will populate after you select an **Asset Tag**.

3. Enter a **Reason** for this **Dispose** transaction by clicking in the **Reason** field. A menu will appear listing the options. Reasons are: **Sale**, **Lost**, **Damaged**, **Trade In**, **Stolen** or **Other**.
4. When you are finished entering information, tap the **Dispose** button.

3.6.14 iOS Audit

Professional and Enterprise Editions Only

The **Audit Assets** transaction is used to verify or update the location of one or more assets.

Note: The screen examples shown in this topic were taken from an iPhone. The **Move** screen on the iPad is identical in look and functionality.

1. From the **Main Menu** tap **Audit**. The **Audit** screen appears.

Find Assets

2. Select a **Site** and **Location** for this audit by scanning, enter using the keyboard or [Searching](#).

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [iOS Pinning Data](#).

3. Set an **Audit Start Time**. This feature allows you to stop and restart an audit without auditing the same inventory twice by telling MobileAsset to only include those assets that were not audited prior to the entered

start date and time. For example, if you begin an audit on November 6, but had to stop at midnight and the audit was not completed, you can enter 11/7/2014 at 12am to begin the new audit. This means that only items that have not been audited as of 12am on November 7 will be included in this audit.

4. Tap the **Find Assets** button. The **Audit** screen will appear listing all assets not yet audited at the selected location.

Audit

Asset Tag: 

Description:

13 Assets not audited at location: TEXAS

Asset Tag: Keyboard

Serial #:

Description: keyboard standard black

Asset Tag: Monitor 17"

Serial #:

Description: 17" Monitor

Asset Tag: Monitor 24"

Serial #: 22376540432

Description: ACL 24" Monitor Black

Start Audit

5. When you have verified the assets are at the location, tap on one or more assets in the list, then tap the **Start Audit** button. Those items will be removed from the list. Keep auditing until your list indicates you have 0 assets not audited at the location.

When **0 Assets not audited at location** is displayed, you can begin Auditing any assets you have found at that Location which asset did not list.

For each asset that MobileAsset did not list, enter a specific **Asset Tag** by scanning, entering using the keyboard or [Searching](#), then tap the **Start Audit** button. A message will appear notifying you that the asset is not at the specified location. You can either move the asset to this location and audit it, or mark it as audited in the location it is assigned to in MobileAsset. Keep in mind that whichever option you choose, the asset will be audited.

If you know that an asset you have found should *not* reside at that Location, do not perform any transactions to rectify the misplacement. Use the [Edit](#) screen to look up the Asset Tag's correct Location, then exit the **Edit** screen, and physically relocate the asset to its correct Location.

If an asset is missing at the location being audited, you must perform a Dispose transaction to declare it missing.

3.6.15 iOS Funding Audit

Professional and Enterprise Editions Only

The **Funding Audit** function allows you to audit those assets associated with a funding source.

Note: The screen examples shown in this topic were taken from an iphone. The **Funding Audit** screen on the ipad is identical in look and functionality.

1. From the **Main Menu** tap **Funding Audit**. The **Funding Audit** screen appears.

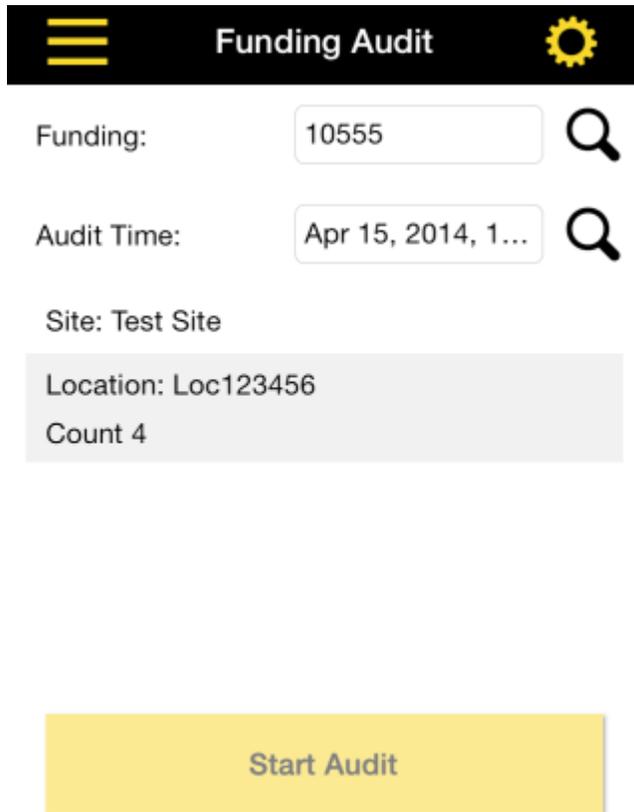
The screenshot shows the 'Funding Audit' screen. At the top, there is a black navigation bar with a hamburger menu icon on the left, the text 'Funding Audit' in the center, and a gear icon on the right. Below the navigation bar, there are two search fields. The first field is labeled 'Funding:' and is empty. The second field is labeled 'Audit Time:' and contains the text 'Apr 15, 2014, 1...'. Both fields have a magnifying glass icon to their right. At the bottom of the screen, there is a large yellow button with the text 'Start Audit'.

2. Select a **Funding** source by scanning, enter using the keyboard or [Searching](#).

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [iOS Pinning Data](#).

When you select a **Funding** source, a list of **Sites** and **Locations** containing assets associated with that source will appear:

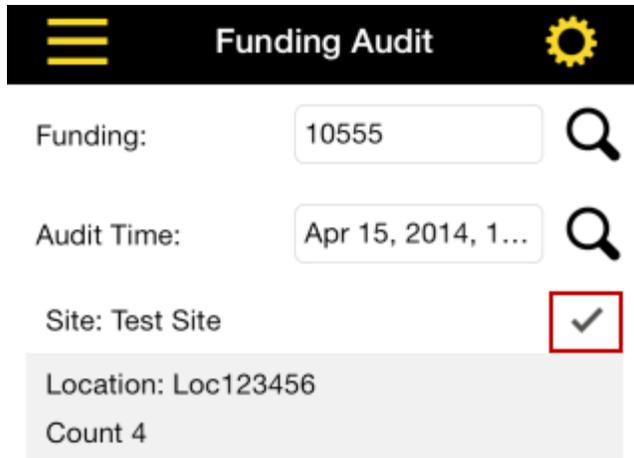


The screenshot shows the 'Funding Audit' screen. At the top, there is a black header with a yellow hamburger menu icon on the left, the text 'Funding Audit' in the center, and a yellow gear icon on the right. Below the header, there are two input fields with magnifying glass icons to their right. The first field is labeled 'Funding:' and contains the value '10555'. The second field is labeled 'Audit Time:' and contains the value 'Apr 15, 2014, 1...'. Below these fields, the text 'Site: Test Site' is displayed. A light gray box contains the text 'Location: Loc123456' and 'Count 4'. At the bottom of the screen, there is a large yellow button with the text 'Start Audit'.

3. Enter the **Audit Time** or use the Magnifying Glass icon to search for a recent Audit.

This feature allows you to stop and restart an audit without auditing the same inventory twice by telling MobileAsset to only include those assets that were not audited prior to the entered start date and time. For example, if you begin an audit on November 6, but had to stop at midnight and the audit was not completed, you can enter 11/7/2014 at 12am to being the new audit. This means that only items that have not been audited as of 12am on November 7 will be included in this audit.

4. Highlight a **Site** in the list and tap the **Start Audit** button.



The screenshot shows the 'Funding Audit' interface. At the top, there is a black header with a yellow hamburger menu icon on the left, the text 'Funding Audit' in the center, and a yellow gear icon on the right. Below the header, there are three search filters: 'Funding:' with a text input containing '10555' and a magnifying glass icon; 'Audit Time:' with a date input containing 'Apr 15, 2014, 1...' and a magnifying glass icon; and 'Site: Test Site' with a checkmark icon in a red-bordered box. Below these filters, there is a grey box containing the text 'Location: Loc123456' and 'Count 4'.

Start Audit

5. The **Audit** screen appears with a list of assets not yet audited at the selected **Site/Location**:

< Audit

Asset Tag: 🔍

Description:

13 Assets not audited at location: TEXAS

Asset Tag: Keyboard

Serial #:

Description: keyboard standard black

Asset Tag: Monitor 17"

Serial #:

Description: 17" Monitor

Asset Tag: Monitor 24"

Serial #: 22376540432

Description: ACL 24" Monitor Black

Start Audit

When you have verified the assets are at the location, tap on one or more assets in the list, then tap the **Start Audit** button. Those items will be removed from the list. Keep auditing until your list indicates you have 0 assets not audited at the location.

When **0 Assets not audited at location** is displayed, you can begin Auditing any assets you have found at that Location which asset did not list.

For each asset that MobileAsset did not list, enter a specific **Asset Tag** by scanning, entering using the keyboard or [Searching](#), then tap the **Start Audit** button. A message will appear notifying you that the asset is not at the specified location. You can either move the asset to this location and audit it, or mark it as audited in the location it is assigned to in MobileAsset. Keep in mind that whichever option you choose, the asset will be audited.

If you know that an asset you have found should *not* reside at that Location, do not perform any transactions to rectify the misplacement. Use the [Edit](#) screen to look up the Asset Tag's correct Location, then exit the **Edit** screen, and physically relocate the asset to its correct Location.

If an asset is missing at the location being audited, you must perform a Dispose transaction to declare it missing.

3.6.16 iOS Maintenance

Professional and Enterprise Editions Only

You can mark maintenance as complete for an asset directly on the mobile device.

Note: The screen examples shown in this topic were taken from an iPhone. The **Move** screen on the iPad is identical in look and functionality.

1. From the **Main Menu** tap the **Maintenance** icon. The **Maintenance** screen appears:

The screenshot shows the Maintenance screen with the following fields and controls:

- Asset Tag:** Input field with a search icon.
- Description:** Disabled input field.
- Schedule:** Input field with a search icon.
- Completed:** Radio button.
- Completed On:** Date field showing "Apr 15, 2014".
- Condition:** Disabled input field.
- Notes:** Text area with a search icon.
- Picture** and **Submit** buttons at the bottom.

2. Scan, enter using the keyboard or [Search](#) for an **Asset Tag**. The **Description** field will populate.

For information on entering or scanning information in MobileAsset, please refer to the topic [Entering or Scanning Information](#).

Keep in mind that you can "pin" fields on this screen. For more information on pinning, please refer to the topic [iOS Pinning Data](#).

3. Tap the **Schedule** field to view a list of any scheduled maintenance for this asset.

Schedule: 

Completed:

Completed On:

Unscheduled Maintenance

monthly ct ✓

If scheduled maintenance exists for this asset, select it from the list or you can choose **Unscheduled Maintenance**. Tap the Magnifying Glass icon to view the details of the scheduled maintenance on the **Schedule** screen.

< **Schedule**

Asset Tag:

Schedule:

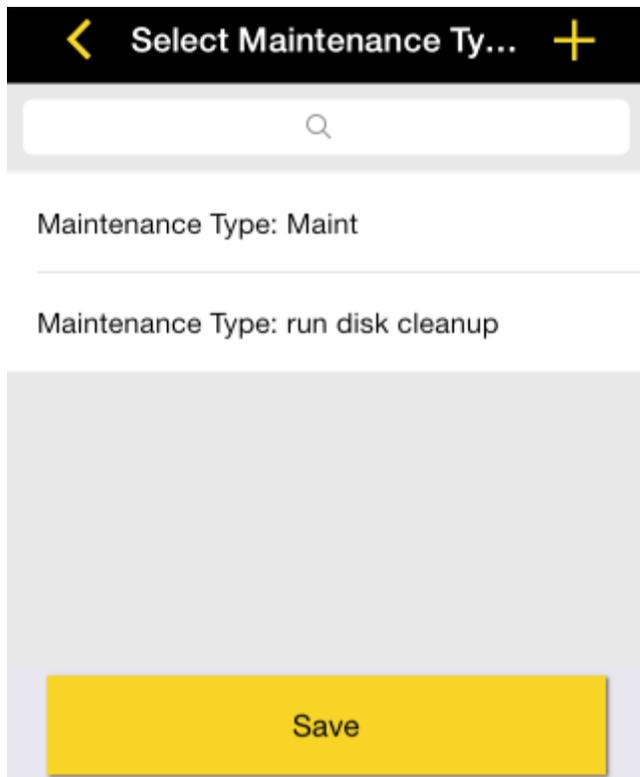
Schedule Date:

Instructions:

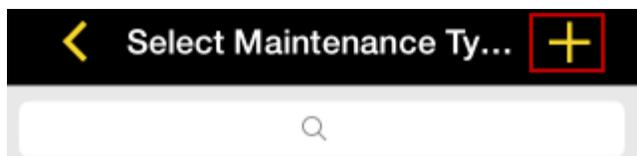
monthly ct

Tap the arrow icon at the top of the screen to return to the **Maintenance** screen.

4. Mark this **Maintenance** as completed by tapping the **Completed** circle.
5. Enter a condition for the asset by tapping in the **Condition** field, then selecting from the list. Options are **Bad**, **Excellent**, **Fine** and **Good**.
6. Enter notes in the **Notes** field as needed. You can search for previously used **Maintenance Types** to add to the Notes field by tapping the Magnifying Glass icon. The **Select Maintenance Type** screen appears:



You can create a new **Maintenance Type** by tapping the yellow + icon.



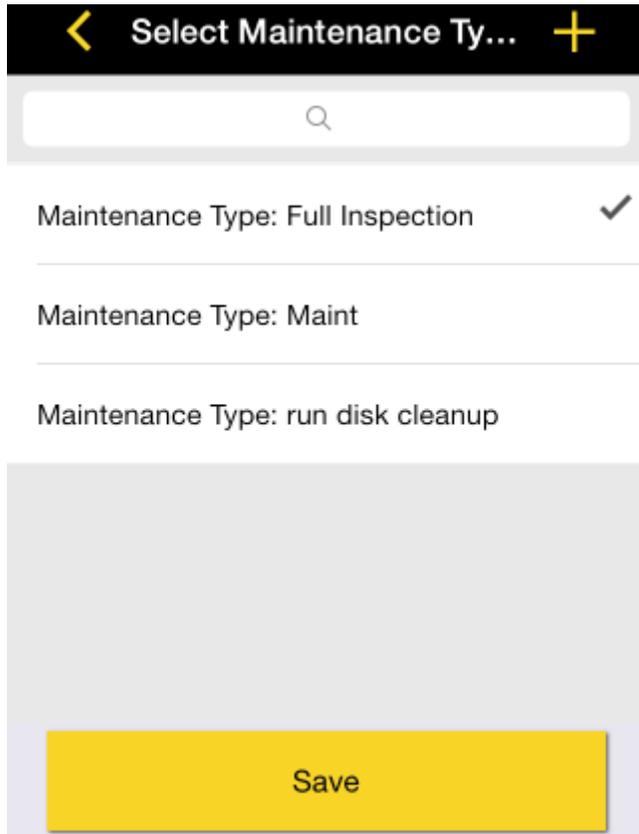
The **New Maintenance Type** screen appears.

< New Maintenance Type

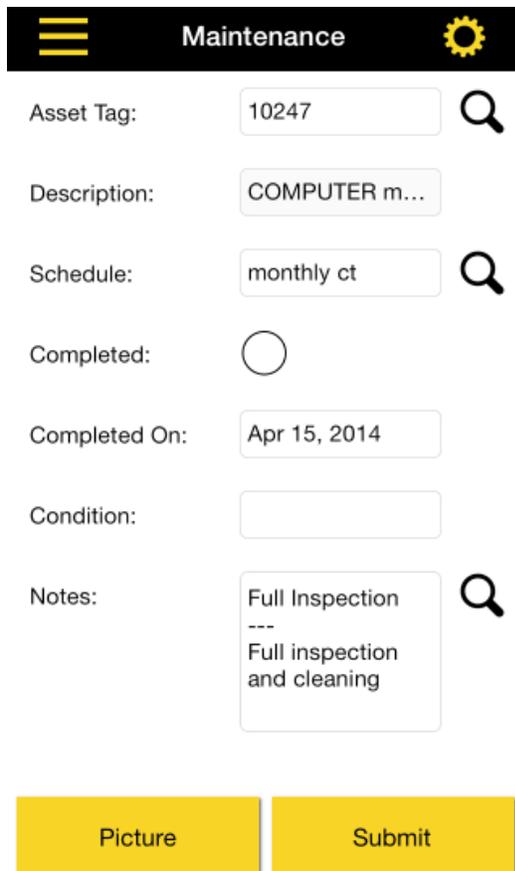
Short Name

Full Description

Enter a **Short Name** and a **Full Description** for this **Maintenance Type**, then tap the **OK** button. The new **Maintenance Type** will be added to the **Select Maintenance Type** screen.

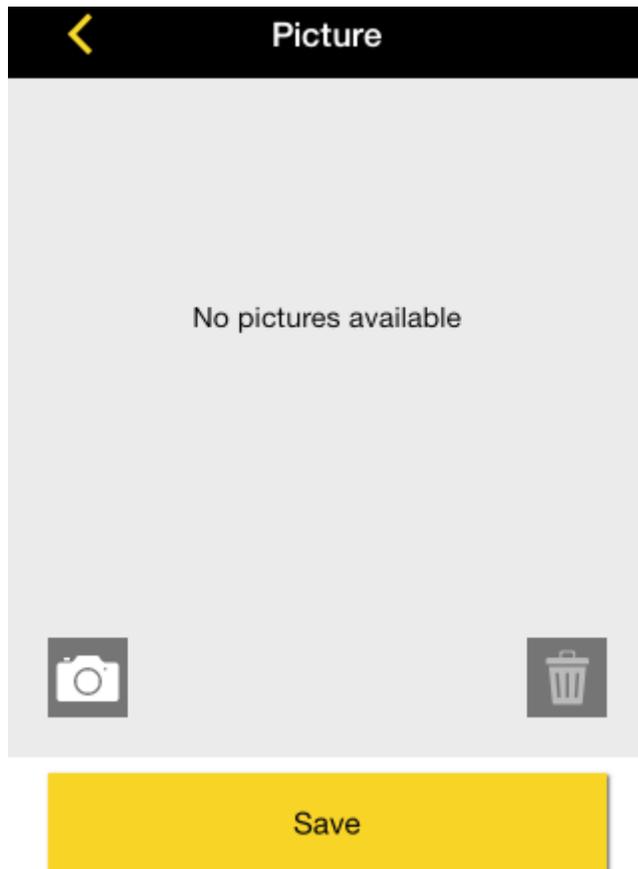


Tap the **Maintenance Type** you want to use, then tap the **Save** button. The **Maintenance Type** will be added to the **Notes** section.



7. If you want to add a picture of the asset to this **Maintenance**, tap the **Picture** button.

The **Picture** screen appears.



Click the **Camera** icon. A screen will appear asking if you want to take a new picture or browse for a picture on your device.



Open Camera - Select this option to access the camera feature on your device. Take the picture as you normally would on your device, then select **Use this image**, or **Retake** to discard the current picture and take another. When you select **Use this image** the image will be displayed on the **Picture** tab. Images taken via the camera through the MobileAsset app are not saved to your device. They are transmitted to the MobileAsset database.

Choose from Photos - Select this option to browse for a picture on your device.

When you select or take a photo, it will appear in the **Picture** tab.



Click the **Trash** can icon to delete the image.

The number of pictures you can attach to an asset is limited by the number set in [Options > Maximum Pictures Captured](#). The default captures is 5.

Pictures can be viewed on the [Transaction List](#).

8. When you are finished adding information, tap the **Submit** button.

3.6.17 iOS Settings

Professional and Enterprise Editions Only

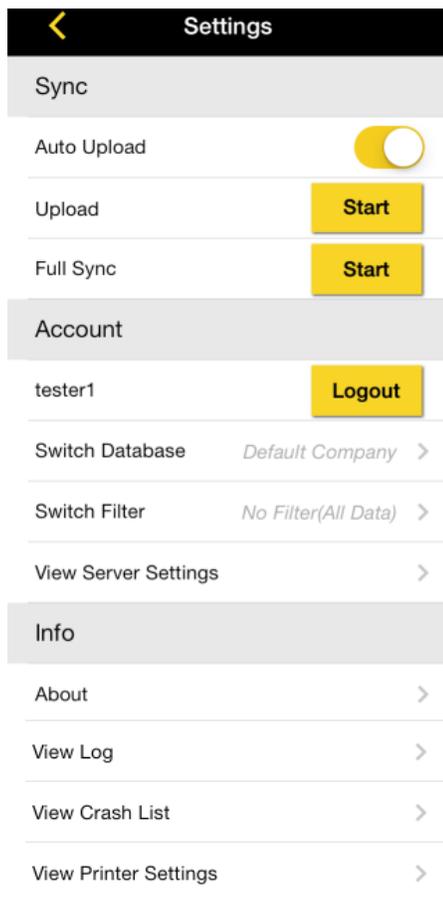
The **Settings** screen allows you to log out of the MobileAsset app, the upload/sync the data on the device with the MobileAsset database.

Note: The screen examples shown in this topic were taken from an iphone. The **Move** screen on the ipad is identical in look and functionality.

To access the **Settings** screen, tap the  icon located at the top of many screen.



The **Settings** screen will appear:



The features contained in the Settings screen are:

Sync

[Auto Upload](#)
[Upload](#)
[Full Sync](#)

Account

- [<Username>](#)
- [Switch Database](#)
- [Switch Filter](#)
- [View Server Settings](#)

Info

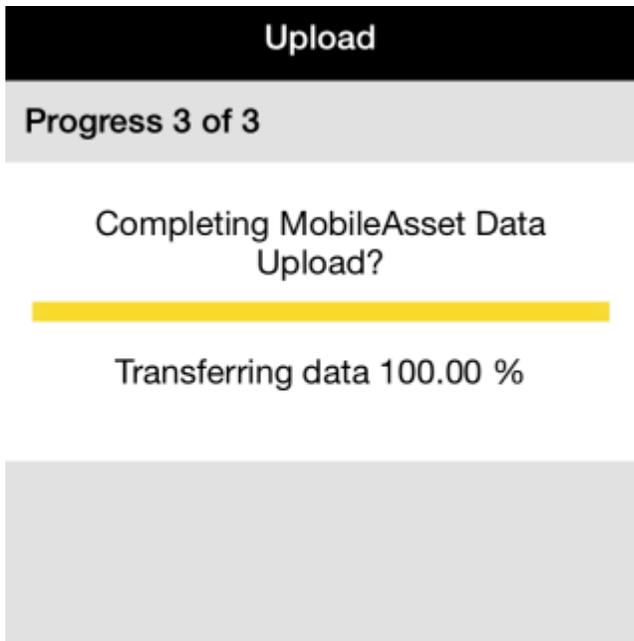
- [About](#)
 - [View Log](#)
 - [View Crash List](#)
 - [View Printer Settings](#)
-

Auto Upload

Turn the **Auto Upload** feature on to enable auto upload of data from the MobileAsset app to the MobileAsset database. The upload will take place each time you return to the **Main Menu** and select a function.

Upload

Tap the **Start** button in the **Upload** row to immediately begin a data upload from the MobileAsset app to the MobileAsset database. When the upload begins a progress screen will appear:



Full Sync

Full Sync uploads data from the MobileAsset App to the MobileAsset database followed by a download of the MobileAsset database. This ensures that any changes/new data uploaded from other devices will appear on the current device.

<Username>

Tap **Logout** next to your user name to log out of the MobileAsset app.

Switch Database

If your company uses more than one database, the **Switch Database** function allows you to switch between them. The currently connected database will appear here.

If you have transactions on the device that have not yet been uploaded to the database, you will not be able to switch databases until the upload is completed.

To change the database, tap the arrow to access the database settings screen:



Server URL

Device Name

Username

Password

Login

Enter the **Server URL**, **Device Name**, your **Username** and **Password**, then select **Login**.

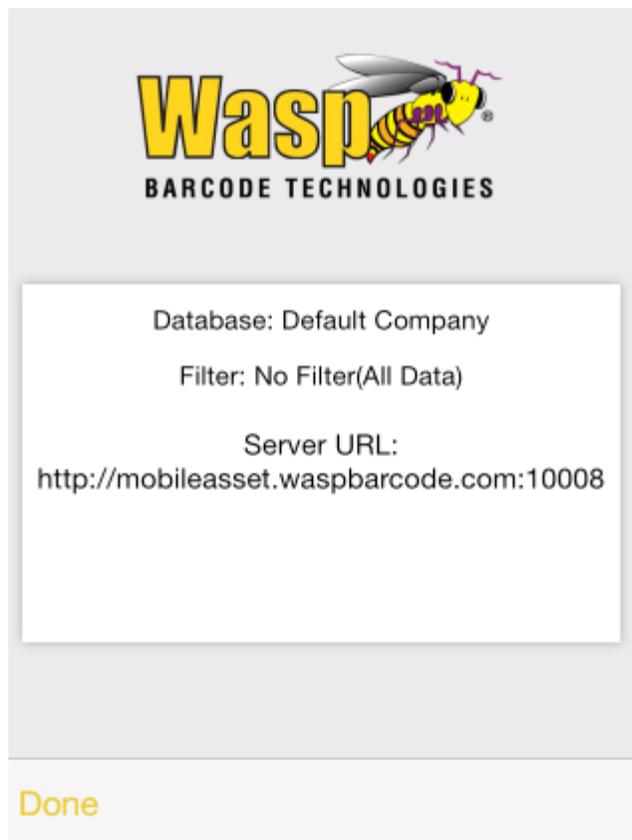
Switch Filter

The Switch Filter feature allows you to switch the filter on the database.

Note: Filters are setup from **Mobility** > [Specify Mobile Device Data Filters](#) screen on the PC.

View Server Settings

This option allows you to view the current server settings.



About

Tap the **About** section to view information about the current Database, Filter selection as well as the current version of the MobileAsset app.



Tap **Done** to close the **About** screen.

View Log

Tap **View Log** to view the MobileAsset log page.

View Crash List

Tap **View Crash List** to view a list of any MobileAsset app crashes.

View Printer Settings

Tap this option to view, setup or change the current label printer settings.



The screenshot shows a mobile application interface for configuring a printer. At the top, there is a black navigation bar with a yellow left-pointing arrow and the text "Configure Printer". Below this, there are two text input fields. The first is labeled "IP/DNS:" and the second is labeled "PORT:". At the bottom of the screen, there is a prominent yellow button with the word "Save" in black text.

On the **Configure Printer** screen enter the following information:

IP/DNS - Enter the IP address of the label printer.

Port - Enter the port the label printer is using.

Chapter 4 - About Screen

The **About** screen allows you to view and manage licenses and provides program version details.

The **About** screen allows you to:

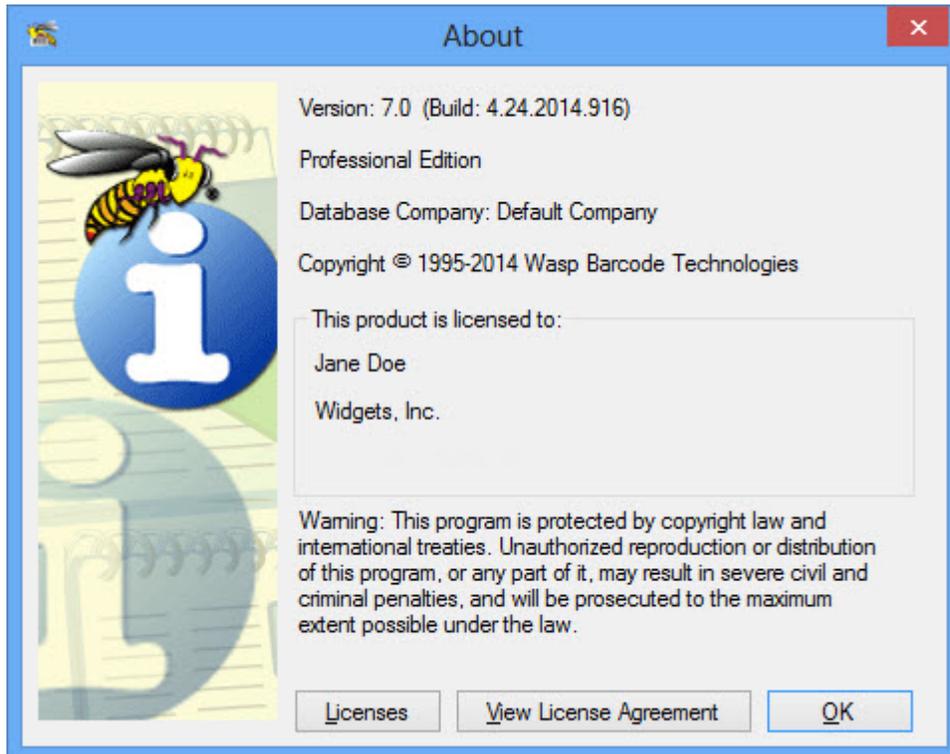
[View Version Number and Basic License Information](#)

[View Your Mobile Device License\(s\)](#)

[View Your License Agreement \(EULA\)](#)

4.1 View Version Number and Basic License Information

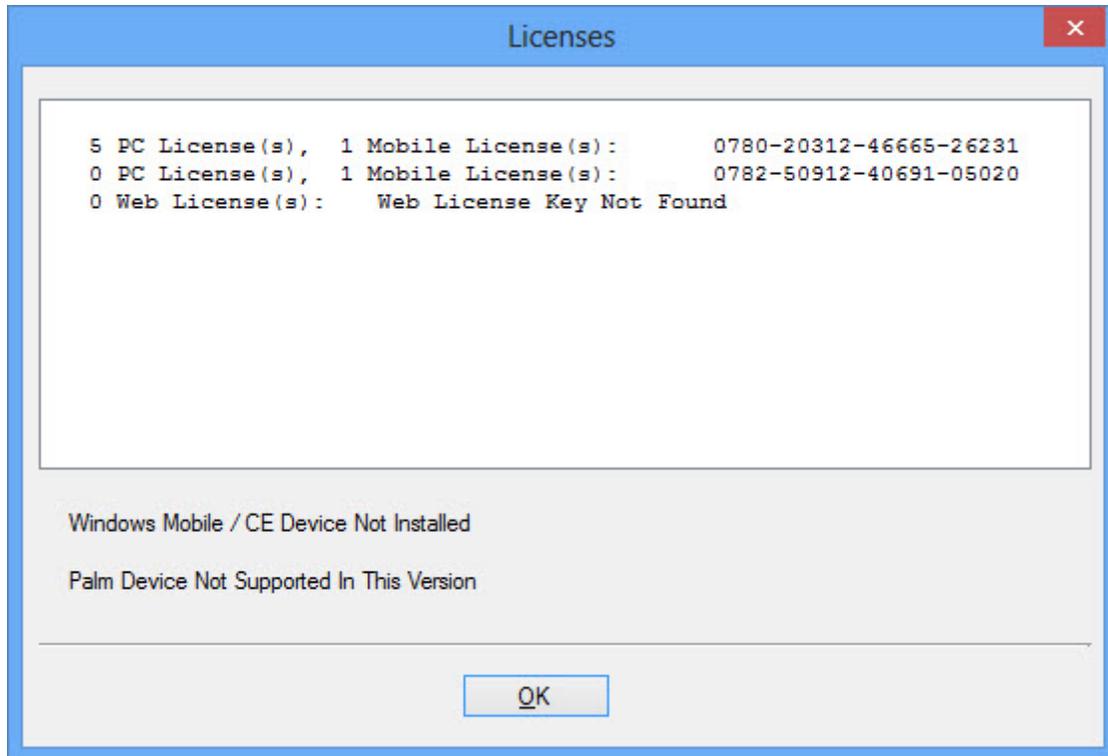
From the **Main** screen, select **Help > About**. The **About** screen appears:



This screen displays your version and basic license information.

4.2 View Your Mobile Device License(s)

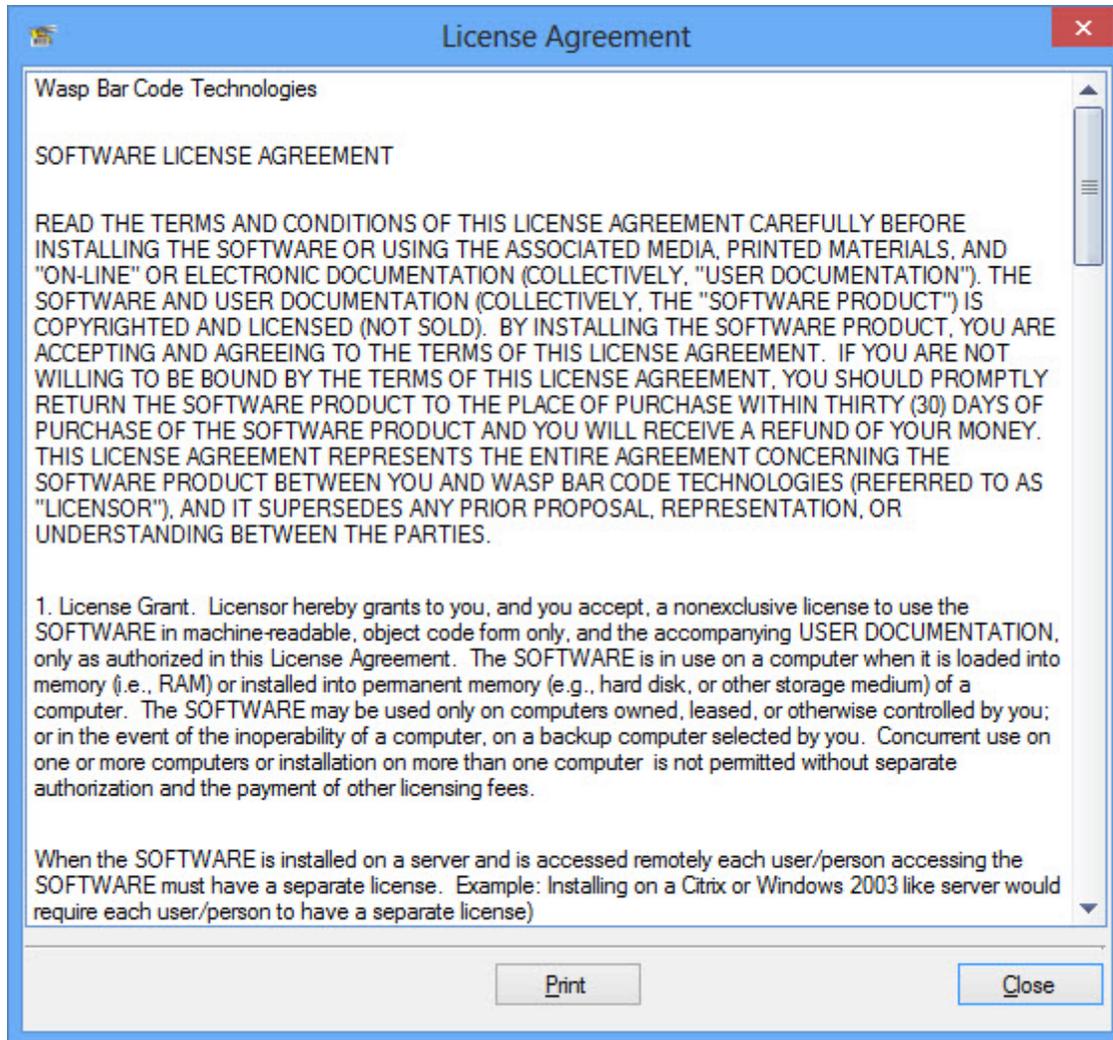
1. On the **About** screen, click the **Licenses** button to view additional licenses and your mobile device licenses. Below is an example of the **Licenses** screen:



2. Click **OK** to exit the Licenses screen. Click **OK** again to close the **About** screen.
-

4.3 View Your License Agreement (EULA)

1. On the **About** screen, click the **View License Agreement** button to view additional licenses and your mobile device licenses. Below is an example of the **License Agreement** screen:



2. Click **Print** to print the EULA.
3. Click **Close** to close the **License Agreement** screen. Click **OK** to close the **About** screen.

Definitions

Asset

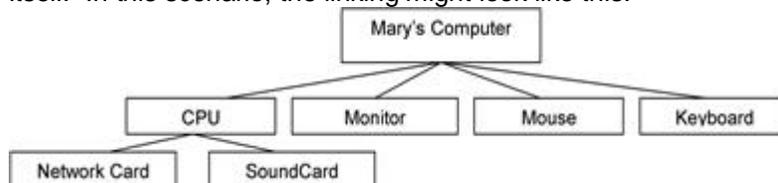
One or more **Assets** can be assigned to each Asset Type. The individual assets are a unique item of a specific make and model number. Each asset is given an Asset Tag that is unique across all Sites and Locations.

Asset Linking

Asset Linking is only available in the Professional and Enterprise editions 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. 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 *Executive Building A23*.

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 *Executive Building A23*. Pay attention to the Site you are working with when using Asset.

Technical Support



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