Asset Tracking
User Guide

Crow Canyon Software

Contents

Introduction

Reference guide for Crow Canyon Asset Manager for SharePoint

Application Overview

The key elements of the application:

- Business process features
    - Asset Management to track and manage assets
    - Vendor management to track and manage vendors
    - Light weight contract management to relate contracts to assets
    - Software asset management to track and manage software
- List Collaboration
    - Assets

- Software Assets
- Asset Type's
- Vendors
- Contracts

## Navigation and Main Lists

- Assets
  - New Asset
  - All Assets
  - Search Assets
  - Asset Administration
  - Maintenance Tasks
- Software Assets
  - Software Assets (main dashboard for software list)
  - New Software Asset
  - New Software Licenses
  - All Software Assets
  - Search Software Assets
- Vendors
  - Vendors (main dashboard for vendor list)
  - New Vendor
- Report Center
  - Report Center Dashboard
- Contracts
  - Contracts (main dashboard for contract list)
  - New Contract
  - Contract Documents

Assets List Integration

The Asset list integrates with all of sub list within the Asset Management application through the Crow Canyon Associated Items feature. https://www.crowcanyon.info/nitro/appmanual_v2/form-settings.html
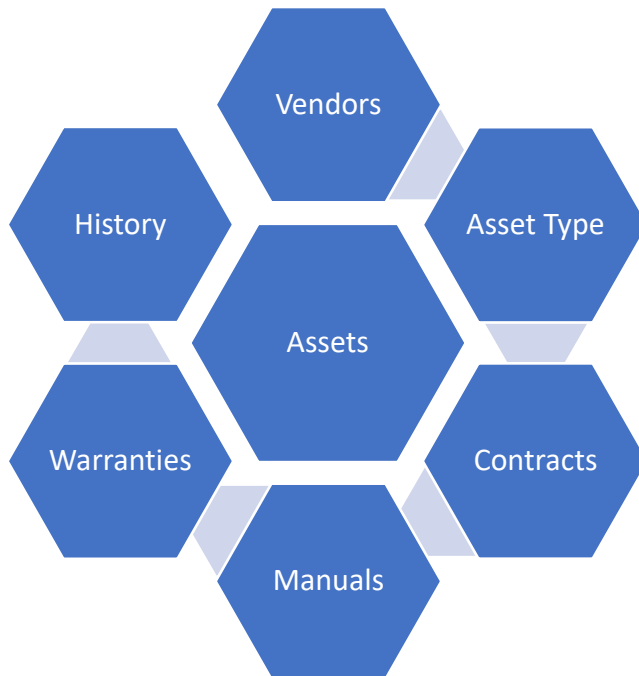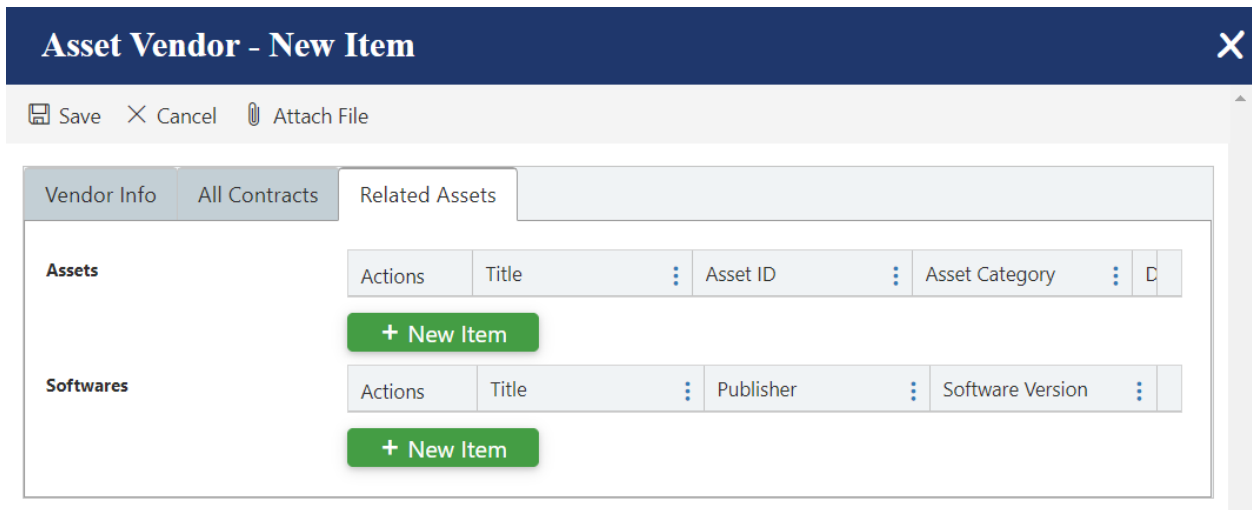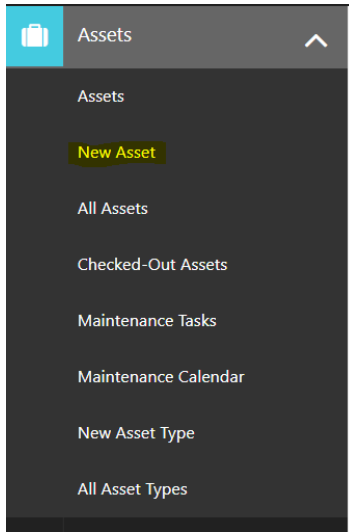
The IT Help Desk can include an integrated asset tracking. The IT asset tracking system cross references to cases in the Help Desk and to change requests. The following diagram illustrates the data relationships for IT Assets as well the relationships shown above in the out of the box Asset Tracker.
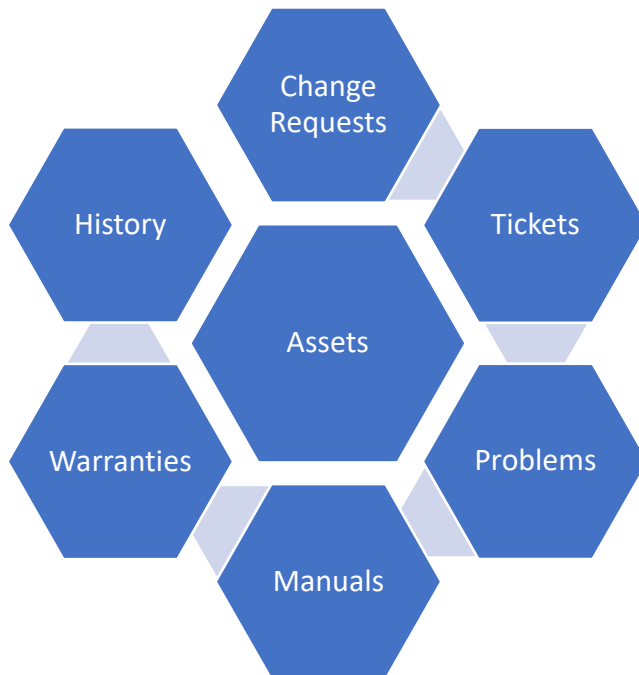
Creating Assets

Assets can be created:

- Manually by adding Assets directly to the list by using the 'New Asset' feature in the quick launch
- Clicking 'New Item' in the Related Assets of the Vendor Form
- Imported using the Crow Canyon excel to SharePoint import tool:
  https://www.crowcanyon.help/article/204

Managing Assets

Once the asset is created you will be able to tie all information stored in the child lists detailed about and relate that information directly to the asset. You can also store information directly on the asset. See below for all tabs and columns.

- Asset Info
  - Asset ID
  - Title
  - Asset Description
  - Asset Type (lookup to the Asset Type list)
  - Status
  - Model
  - Serial Number
  - Service Type
  - Contract Service Date (SLA for email reminders on date columns https://www.crowcanyon.help/article/287/)
  - Asset Category
  - Make
  - Model No
  - Bar Code Number
  - Asset Info Link

- Location
    - Assigned To (syncs with SP User Profiles, Custom List or Active Directory)
    - Department
    - Location
    - Building
    - Room
    - Rack

- Finance

Vendor (lookup to Vendor list)	Date Acquired
Date of Decommission	Depreciable Life
Depreciation Method	Invoice Number
Current Value	Purchase Price
Salvage Value	Total Maintenance Cost
Purchase Date	Date Sold

- Image
  - Asset Image (URL link to picture of Asset)

- Maintenance
  - Enable Maintenance (KB Article to configure maintenance https://www.crowcanyon.help/article/309/)
  - Last Maintenance Date
  - Total Maintenance Cost
  - Tasks (new items are created when maintenance date is due)

- Related Items
  - Manuals (lookup to manual list)
  - Warranties (lookup to warranty list)
  - Contracts (lookup to contracts list)

Check In/Check Out Feature

One of the functions in the Asset tool is to check out assets to users, and then check them back in at a certain date. This helps to track where the Asset is located and who is responsible for that Asset at any given time.

On the main screen of the Asset program, you'll see a webpart for Checked Out Assets:

Check Out

The Asset will have a "Check Out" custom action button in the ribbon of the Display form. This will only appear when the Asset has either never been checked out, or has already been checked back in. When clicked, you'll be asked for some information about the check out:

Check-Out To - The employee to whom the asset will be checked out.

Expected Check-In Date - When the Asset can be expected back in stock/inventory

Check Out/In Comments – General comments about, for example, the condition of the Asset, the intended use of the Asset, and any other relevant information.
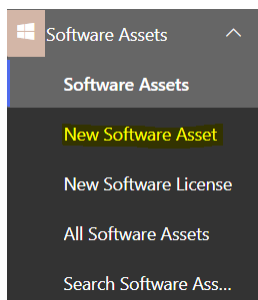
Check In

The Asset will have a "Check In" custom action button in the ribbon of the Display form. This button will only appear after the Asset has been checked out. When clicked, you'll be asked to provide comments, such as the condition of the Asset.

Creating Software Assets

Software Assets can be created:

- Manually by adding Software Assets directly to the list by using the 'New Software Asset' feature in the quick launch

Managing Software Assets

When you create a new software asset you can then track and maintain the number of licenses purchased as well as the number installed/assigned to Assets. When you assign a Software Asset to an Asset the system runs a submit action to ensure you have enough licenses available. All Software assets can be managed using the forms below.

- Software Info
  - o Title
  - o Publisher
  - o Software Version
  - o Status
  - o Vendor (lookup to vendor list)
  - o Work Log

- License Keys
  - Active License Keys
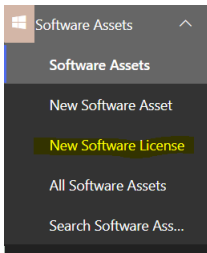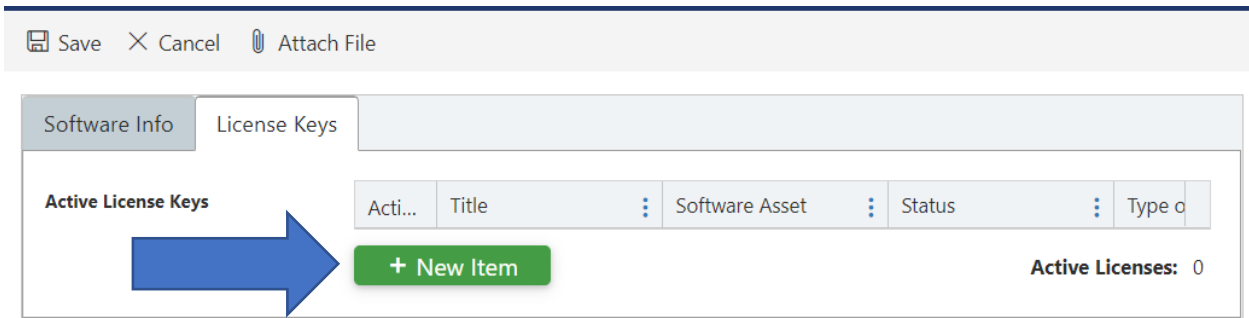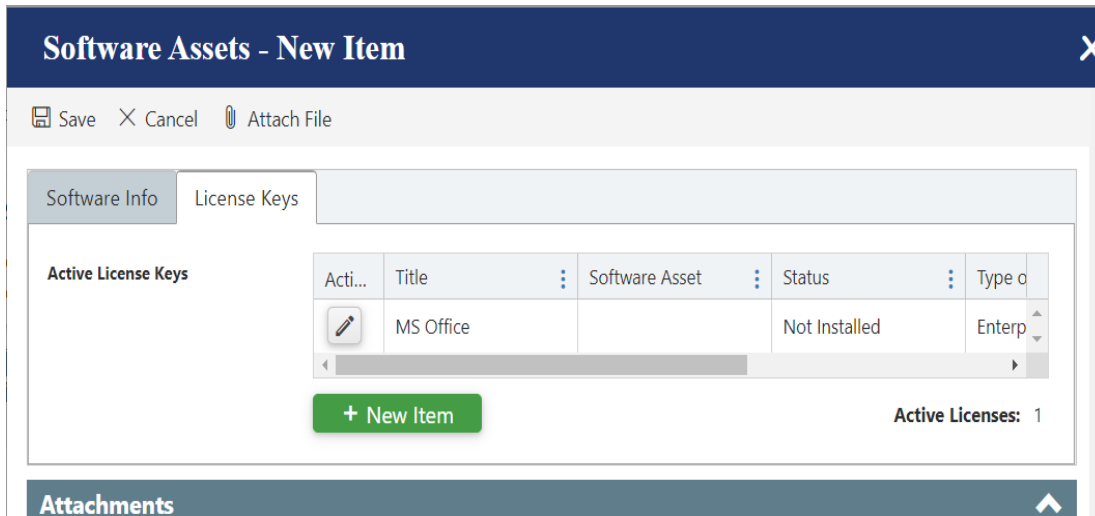

- Software License
  - Title
  - Purchase Count
  - Installed Count
  - License Key
  - Type of Key
  - Work Log
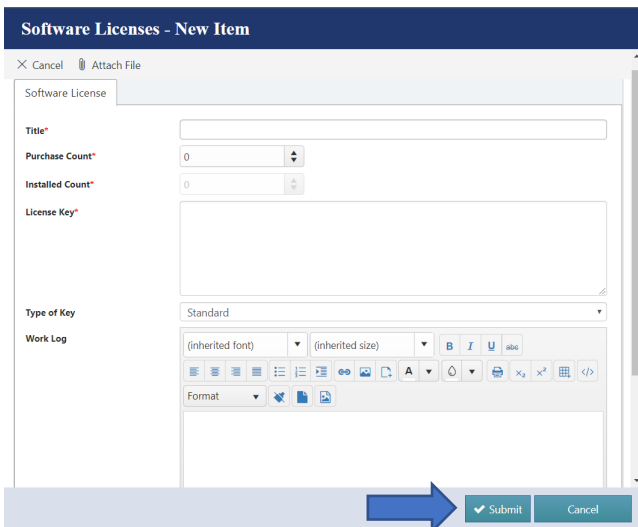
Creating Vendors

Vendors can be created by clicking on the 'New Vendor' in the quick launch
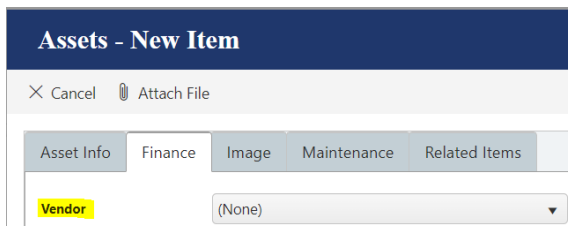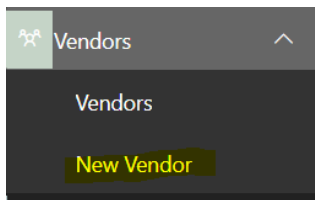
Managing Vendors

Once a vendor is created it can be added to any Asset by selecting the vendor from the column on the Asset form. Within the vendor you can store information pertinent to the vendor as well as relate contracts and assets to a vendor using the Related Items tab.

- Vendor Info
  - Vendor
  - Vendor ID

Vendor Info	All Contracts	Related Assets

Vendor*

Vendor ID

- Contact Details

Contact Name	Job Title
E-mail Address	Business Phone
Mobile Phone	Fax Number
Address	City
State/Province	Country/Region
ZIP/Postal Code	Web Page

Contact Details

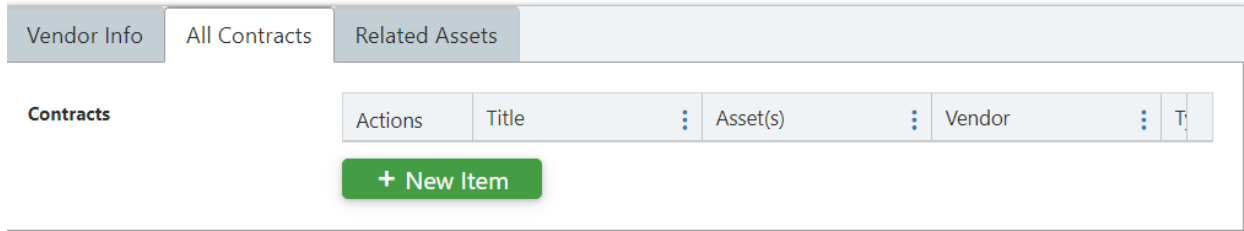|			
Contact Name		Job Title	
E-mail Address		Business Phone	
Mobile Phone		Fax Number	
Address		City	
State/Province		Country/Region	
ZIP/Postal Code		Web Page	Enter link url
			Enter link title

- Vendor Notes
  - Products Offered
  - Notes
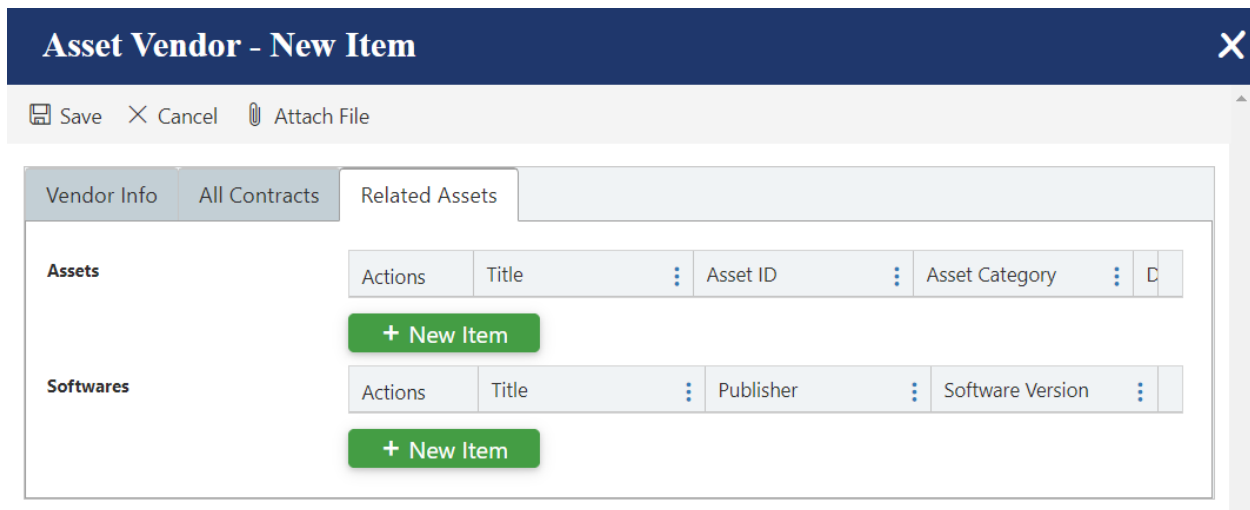
Vendor Notes

Products Offered

Notes

- All Contracts
  - A link to create a 'New Contract' which will be covered in the Contracts section
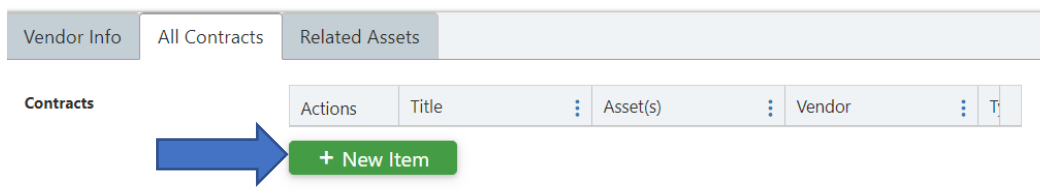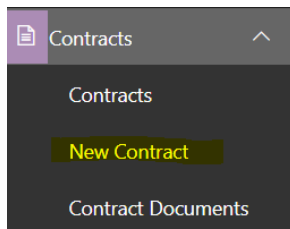
- Related Assets
  - A link to create a new Asset and automatically link the software to the vendor
  - A link to create a new Software and automatically link the software to the vendor

Creating New Contracts

There are three ways to create a new contract

- Clicking on 'New Contract' in the quick launch
- Clicking on 'New Item' in the Asset form
- Clicking on 'New Item' in the Vendor form

Managing Contracts

Once a contract is created you can store are pertinent information related to a contract in the contract form as well as relate contracts to Assets, Software Assets and Vendors using the Related Items tab.

- Contract Info
  - Title
  - Vendor (lookup to the vendor list)
  - Invoice Number
  - Responsible Person
  - Start Date
  - Expiration Date
  - Type of Contract
  - Renewal Options
  - Value
  - Link to Contract

- Related Items
  - Asset(s) (lookup to the Assets list)
  - Documents

Report Center

The report center is configured in the top navigation link as well as the quick launch.
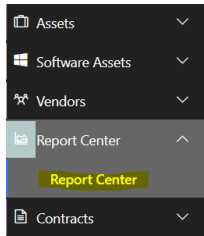
Reports are configured in Dashboards to show progress of list items in the form of charts and Tables.

To configure reports please refer to the NITRO manual:

https://www.crowcanyon.info/nitro/appmanual_v2/report-center.html