

Asset Tracking User Guide

 **Crow Canyon** Software

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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

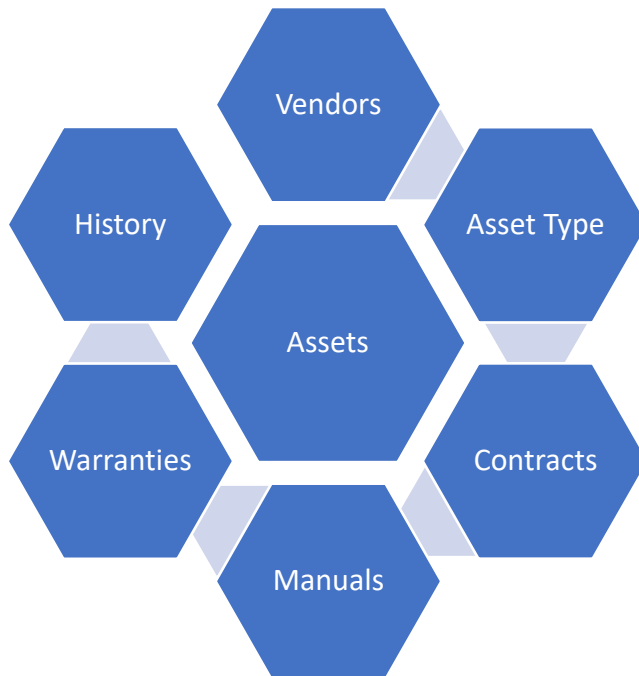
- Software Assets
- Asset Type's
- Vendors
- Contracts

Navigation and Main Lists

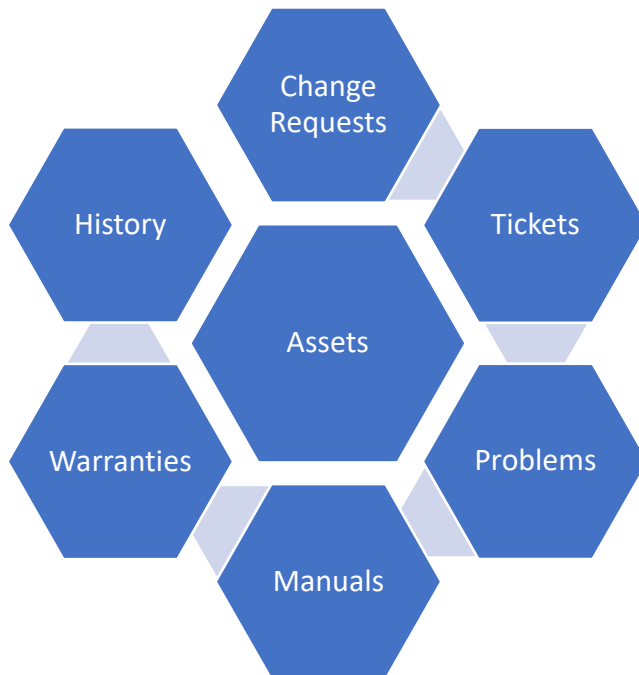
- Assets
 - New Asset
 - All Assets
 - Search Assets
 - Asset Administration
 - Maintenance Tasks
- Software Assets
 - Software Assets (main dashboard for software list)
 - New Software Asset
 - New Software Licenses
 - All Software Assets
 - Search Software Assets
- Vendors
 - Vendors (main dashboard 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



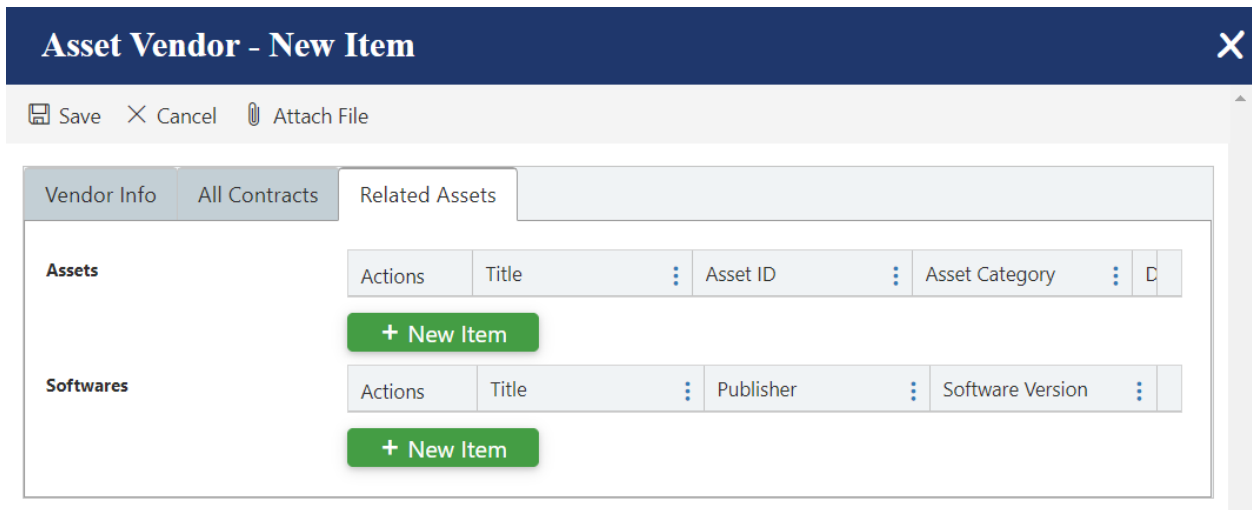
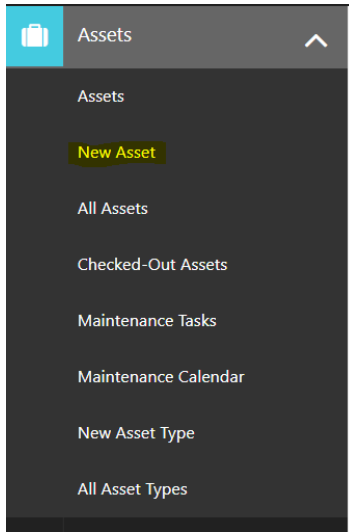
The IT Help Desk can include an integrated asset tracking. The IT asset tracking system cross references to cases in the Help Desk and to change requests. The following diagram illustrates the data relationships for IT Assets as well the relationships shown above in the out of the box Asset Tracker.



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>



A screenshot of the 'Asset Vendor - New Item' form. The form has a dark blue header with the title 'Asset Vendor - New Item' and a close button (X). Below the header, there are three buttons: 'Save', 'Cancel', and 'Attach File'. The main content area is divided into three tabs: 'Vendor Info', 'All Contracts', and 'Related Assets'. The 'Related Assets' tab is active. It contains two sections: 'Assets' and 'Softwares'. Each section has a table with columns for 'Actions', 'Title', 'Asset ID', 'Asset Category', and 'D'. Below each table is a green button with a plus sign and the text '+ New Item'.

Assets - New Item ✕

✕ Cancel
📎 Attach File

Asset Info

Finance

Image

Maintenance

Related Items

Asset ID

Title*

Asset Description

Asset Info
⬆

Asset Type <input style="width: 90%;" type="text" value="(None)"/>	Asset Category <input style="width: 90%;" type="text"/>
Status <input style="width: 90%;" type="text" value="In Service"/>	Make <input style="width: 90%;" type="text"/>
Model <input style="width: 90%;" type="text"/>	Model No <input style="width: 90%;" type="text"/>
Serial Number <input style="width: 90%;" type="text"/>	Bar Code Number <input style="width: 90%;" type="text"/>
Service Type <input style="width: 90%;" type="text"/>	Asset Info Link
	<input style="width: 90%;" type="text" value="Enter link url"/>
	<input style="width: 90%;" type="text" value="Enter link title"/>

Contract Service Date

✓ Save
Cancel

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

Assets - New Item ✕

✕ Cancel 📎 Attach File

Asset Info Finance Image Maintenance Related Items

Asset ID

Title*

Asset Description

Asset Info ⬆

Asset Type <input type="text" value="(None)"/>	Asset Category <input type="text"/>
Status <input type="text" value="In Service"/>	Make <input type="text"/>
Model <input type="text"/>	Model No <input type="text"/>
Serial Number <input type="text"/>	Bar Code Number <input type="text"/>
Service Type <input type="text"/>	Asset Info Link <input type="text" value="Enter link url"/> <input type="button" value="🔗"/>
	<input type="text" value="Enter link title"/>
Contract Service Date <input type="text" value="month-day-year hours:m"/> <input type="button" value="📅"/> <input type="button" value="🕒"/>	







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

Location ⬆


Assigned To <input type="text" value="Enter a name or email address..."/>	Department <input type="text"/>
Location <input type="text" value="Benicia"/>	Building <input type="text" value="Building 1"/>
Room <input type="text"/>	Rack <input type="text"/>

- 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

Asset Info	Finance	Image	Maintenance	Related Items
Vendor	(None) ▼		Date Acquired	month-day-year hours:m  
Date of Decommissioning	month-day-year 		Depreciable Life	<input type="text"/> ▼
Depreciation Method	<input type="text"/>		Invoice Number	<input type="text"/>
Current Value	<input type="text"/> ▼		Purchase Price	<input type="text"/> ▼
Salvage Value	<input type="text"/> ▼		Total Maintenance Cost	<input type="text"/> ▼
Purchase Date	month-day-year 		Date Sold	month-day-year 
Depreciation Value Date	month-day-year 			

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

Asset Info	Finance	Image	Maintenance	Related Items
Asset Image	<input type="text" value="Enter link url"/> 		<input type="text" value="Enter link title"/>	

- 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)

Asset Info	Finance	Image	Maintenance	Related Items
Enable Maintenance				
<input type="checkbox"/>				
Last Maintenance Date				
month-day-year 				
Total Maintenance Cost				
<input type="text"/> ▼				
Tasks				
Actions	Task Name	Assigned To	Task Status	Due Date
 New Item				

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

Asset Info Finance Image Maintenance **Related Items**

Manuals

Actions	Name	Modified	Modified By
+ New Item			

Warranties

Actions	Name	Expiry Date
+ New Item		

Contracts

Actions	Title	Asset(s)	Vendor	Type of Contract	Start Date	Expiration D...	Ir
+ New Item							

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:

Checked-Out Assets

Item Print List Print List Settings

<input type="checkbox"/>	Title	Asset ID	Location	Asset Category	Status	Check-Out Date	Check-Out To
<input type="checkbox"/>	Dell Vostro 260	Asset1		Furniture	In Service	12-20-2018 02:32 AM	Pavan Kumar

Page 1 of 1 5 items per page 1 - 1 of 1 items

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.

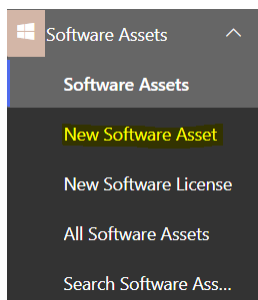
Check In

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



The screenshot shows a web form titled "Software Assets - New Item" with a close button (X) in the top right. Below the title bar is a menu with "Save", "Cancel", and "Attach File". The form is divided into two tabs: "Software Info" and "License Keys". The "Software Info" tab is active and contains the following fields:

- Title***: A text input field.
- Publisher***: A text input field.
- Software Version***: A text input field.
- Status**: A dropdown menu with "Active" selected.
- Vendor**: A dropdown menu with "(None)" selected.
- Work Log**: A rich text editor with a toolbar containing options for font style (bold, italic, underline), font size, text color, background color, bulleted list, numbered list, link, unlink, print, and source code. Below the toolbar is a large text area.

At the bottom of the form, there is an "Attachments" section and two buttons: "Save" and "Cancel".

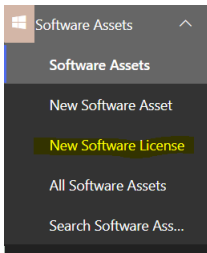
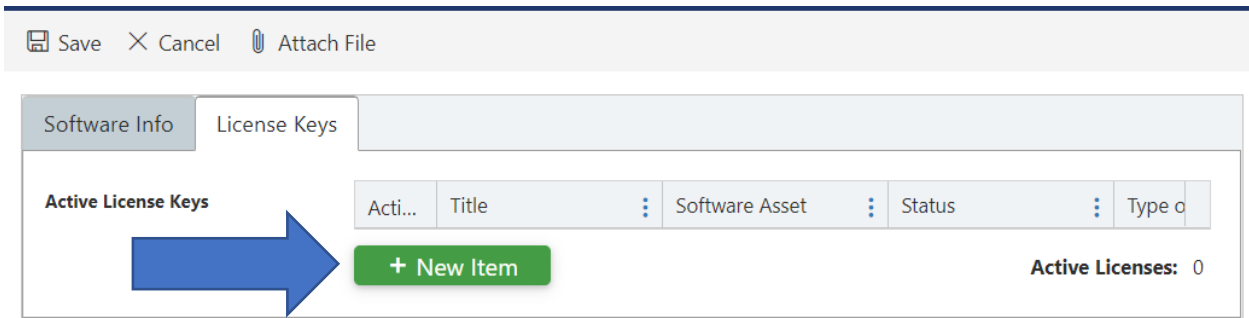
Managing Software Assets

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.

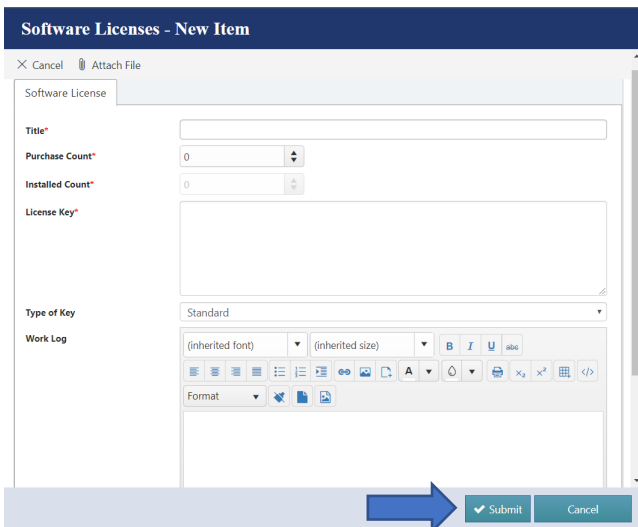
- Software Info
 - Title
 - Publisher
 - Software Version
 - Status
 - Vendor (lookup to vendor list)
 - Work Log

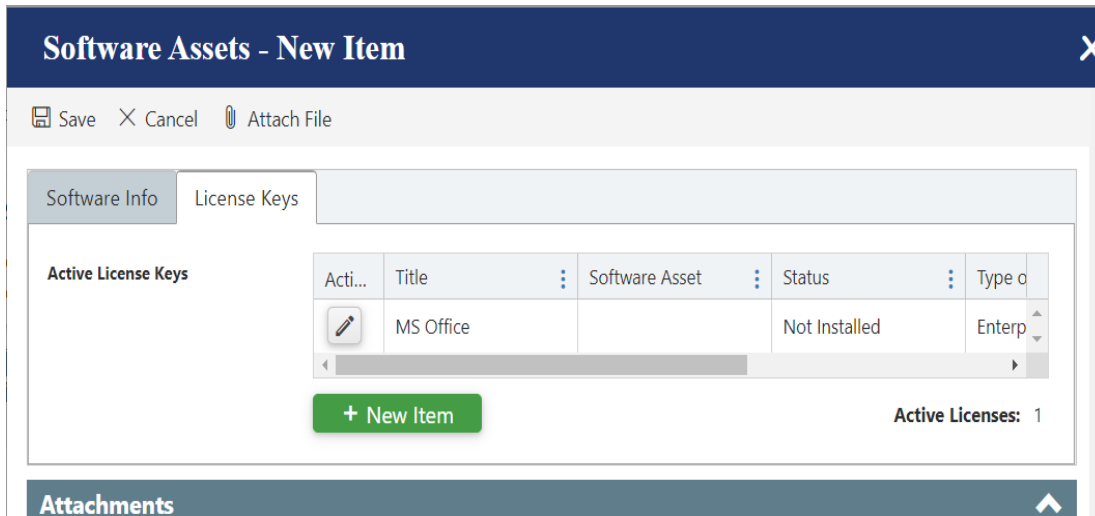
This screenshot is identical to the one above, showing the "Software Assets - New Item" form with the "License Keys" tab selected. It displays the same set of fields: Title, Publisher, Software Version, Status (Active), Vendor (None), and a Work Log area with a rich text editor. The "Attachments" section and "Save" and "Cancel" buttons are also visible at the bottom.

- License Keys
 - Active License Keys



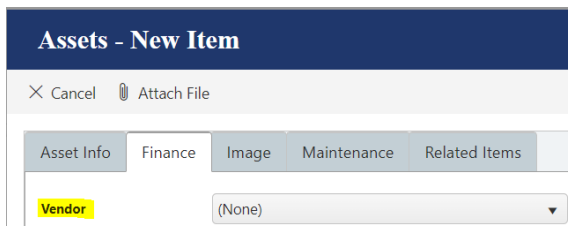
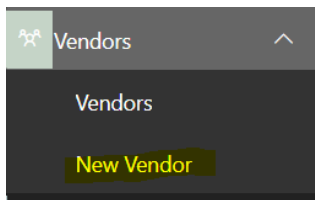
- Software License
 - Title
 - Purchase Count
 - Installed Count
 - License Key
 - Type of Key
 - Work Log





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*	<input type="text"/>	
Vendor ID	<input type="text"/>	

- 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	<input type="text"/>	Job Title	<input type="text"/>
E-mail Address	<input type="text"/>	Business Phone	<input type="text"/>
Mobile Phone	<input type="text"/>	Fax Number	<input type="text"/>
Address	<input type="text"/>	City	<input type="text"/>
State/Province	<input type="text"/>	Country/Region	<input type="text"/>
ZIP/Postal Code	<input type="text"/>	Web Page	<input type="text" value="Enter link url"/> <input type="checkbox"/> <input type="text" value="Enter link title"/>

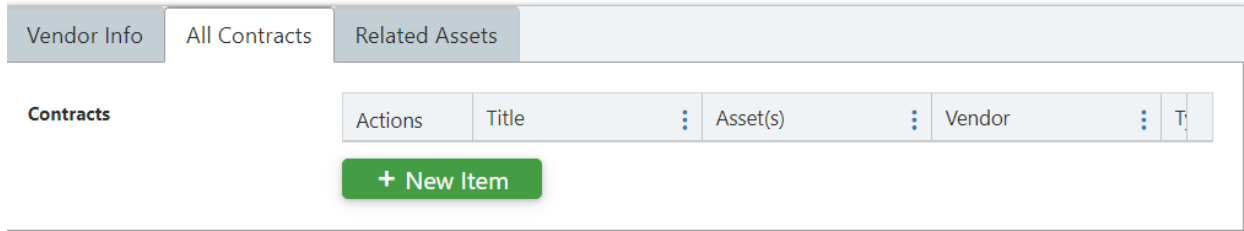
- Vendor Notes
 - Products Offered
 - Notes

Vendor Notes ^

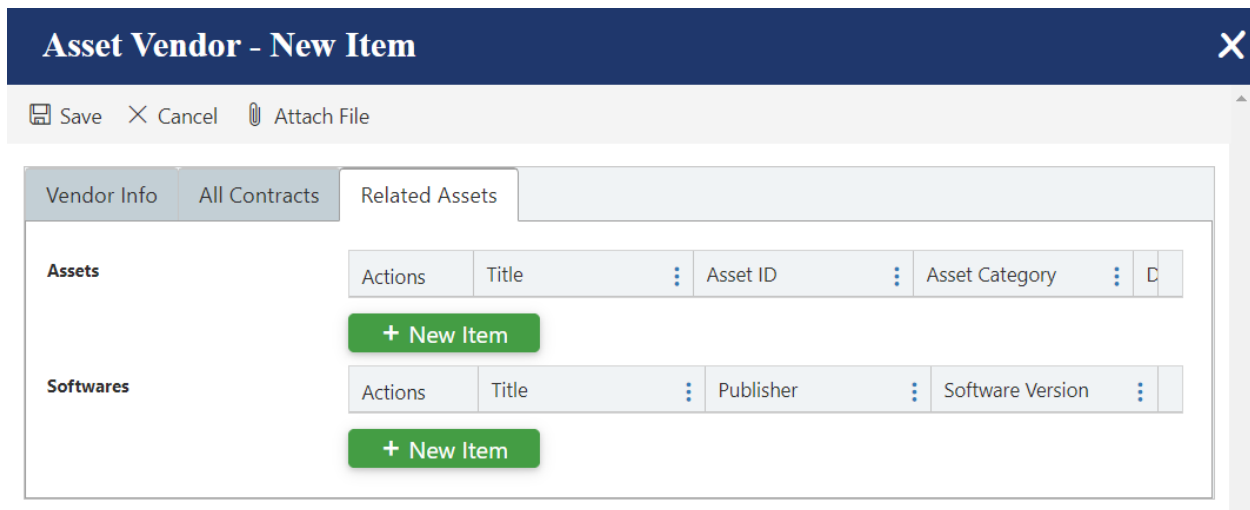
Products Offered

Notes

- All Contracts
 - A link to create a 'New Contract' which will be covered in the Contracts section



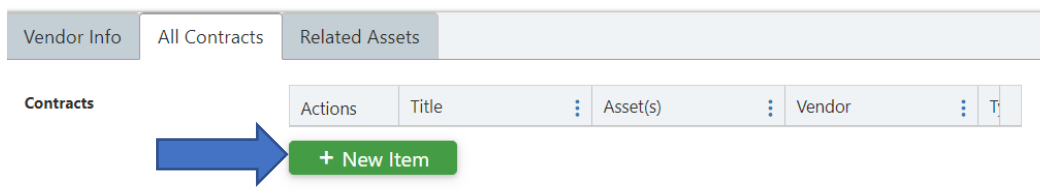
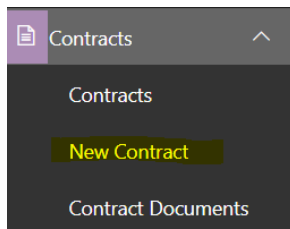
- Related Assets
 - A link to create a new Asset and automatically link the software to the vendor
 - A link to create a new Software and automatically link the software to the vendor



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



Assets - New Item
✕

✕ Cancel 📎 Attach File

Asset Info
Finance
Image
Maintenance
Related Items

Manuals

Actions	Name	Modified	Modified By
📄			

+ New Item

Warranties

Actions	Name	Expiry Date
📄		

+ New Item

Contracts

Actions	Title	Asset(s)	Vendor	Type of Contract	Start Date	Expiration D...	Ir
📄							

+ New Item ←

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

Contracts - New Item ✕

Save ✕ Cancel Attach File

Contract Info

Related Items

Title*

Vendor (None) ▾

Invoice Number

Responsible Person

Start Date

Expiration Date

Type of Contract Support Contract ▾

Renewal Options 3 Year Term Auto Extension ▾

Value

Link to Contract

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

Contracts - New Item ✕

Save ✕ Cancel Attach File

Contract Info

Related Items

Asset(s)

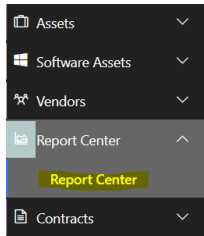
Documents

Actions		Name		Modified	
📄	⋮		⋮		⋮

+ New Item

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

