Inventory Control:
Web App Tutorial

March 3, 2020

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Definitions Glossary

Asset
Non-expendable property that has an original cost of $2000 or more or is a computer (desktop or laptop, at any original cost.)

Equipment Manager
The WKU faculty or staff member who is responsible for the asset.

Index Number
Also known as 'Org Code'. A six digit code used to identify a specific department or organization.

Inventory Control
A subsidiary of Supply Chain Management, led by the Inventory Control Coordinator.

Make
The manufacturers trade name of a particular product.

Manufacturer
The name of the company or person who provided the asset.

Model
A unique identifier assigned to an asset by its manufacturer.

O-tag
A temporary tag or origination tag that Banner assigns to an item when an invoice is paid to a fixed asset
expense account.

P-tag
A permanent tag that Inventory Control assigns to a temporary tag. This is also referred to as the ICN (Inventory Control
Number).

Purchase Order
The Purchase Order, or PO [abbr.] is a commercial document issued by a buyer to a seller, indicating types, quantities, and
agreed prices for products or services. PO numbers for WKU currently have two prefixes, P00 and WK.

Purchase Order #
P00 and WK followed by 5 unique numbers.

Purchase Order Item #
A number which corresponds to the location of an asset on a PO. (Line 1, Line 2, etc.)

Requestor
The person who entered the requisition for the asset.

Serial #
A unique code used to identify an asset.

Shipping Code
Also known as 'Ship to Code', a mailing code used to identify which department an asset belongs to.

Tagging
The process wherein Inventory Control will physically tag an asset with a specialized printed sticker containing a number that
corresponds to the asset in Banner.

# Phase I

Introduction

      This is a tutorial of the User Group features within the new inventory control website. We will be covering everything that the *User Group* will have access to within the new website. The '*User Group'* refers to all WKU Faculty and Staff involved in the ordering or management of University assets. If you would like to request training in the new system, please contact WKU Inventory Control at inventorycontrol@wku.edu.

How to Log In

- Visit the WKU Inventory Control website at: https://app.wku.edu/inventory

- Log in using your WKU NetID and Password:
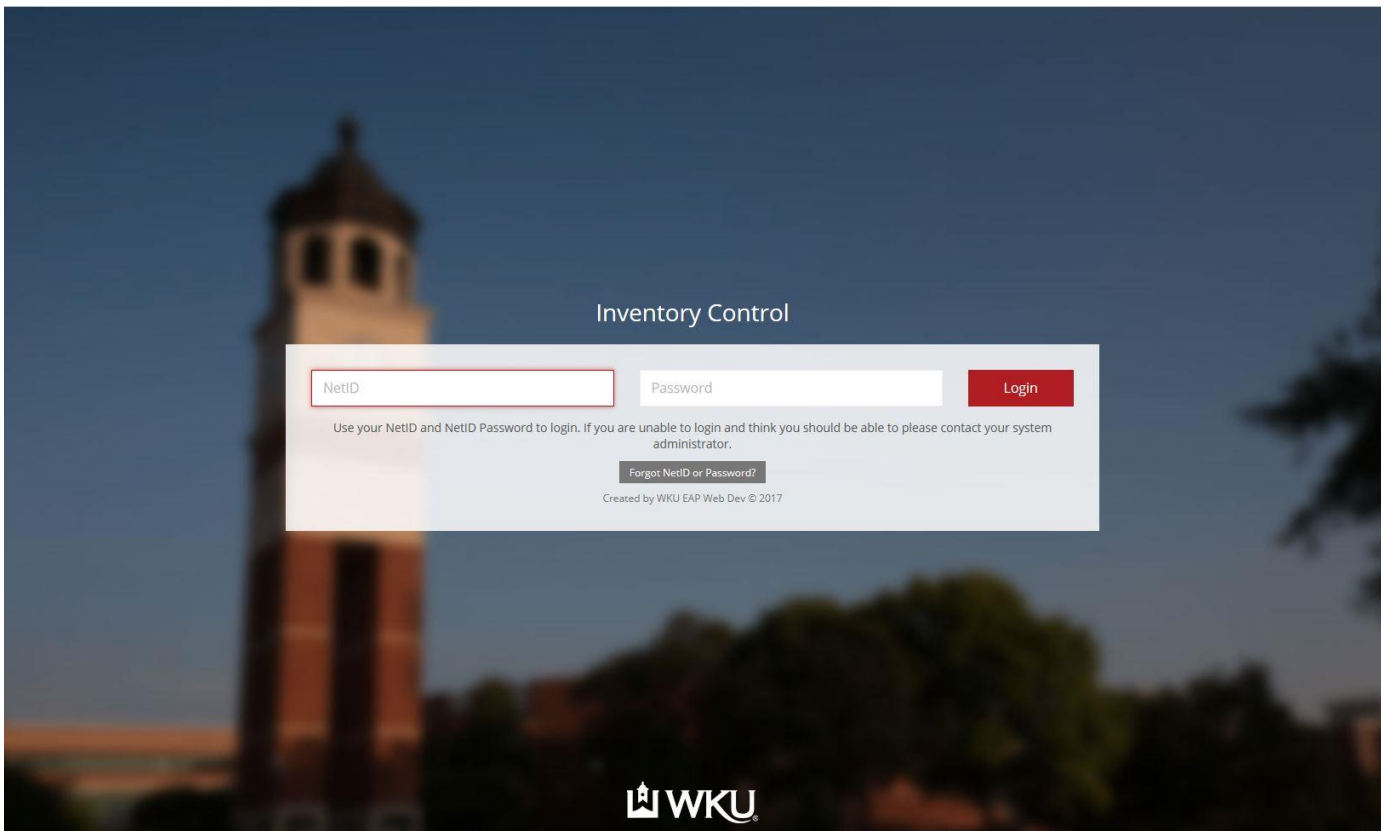
- The main screen will show two options: *Asset Management* and *Logout*:
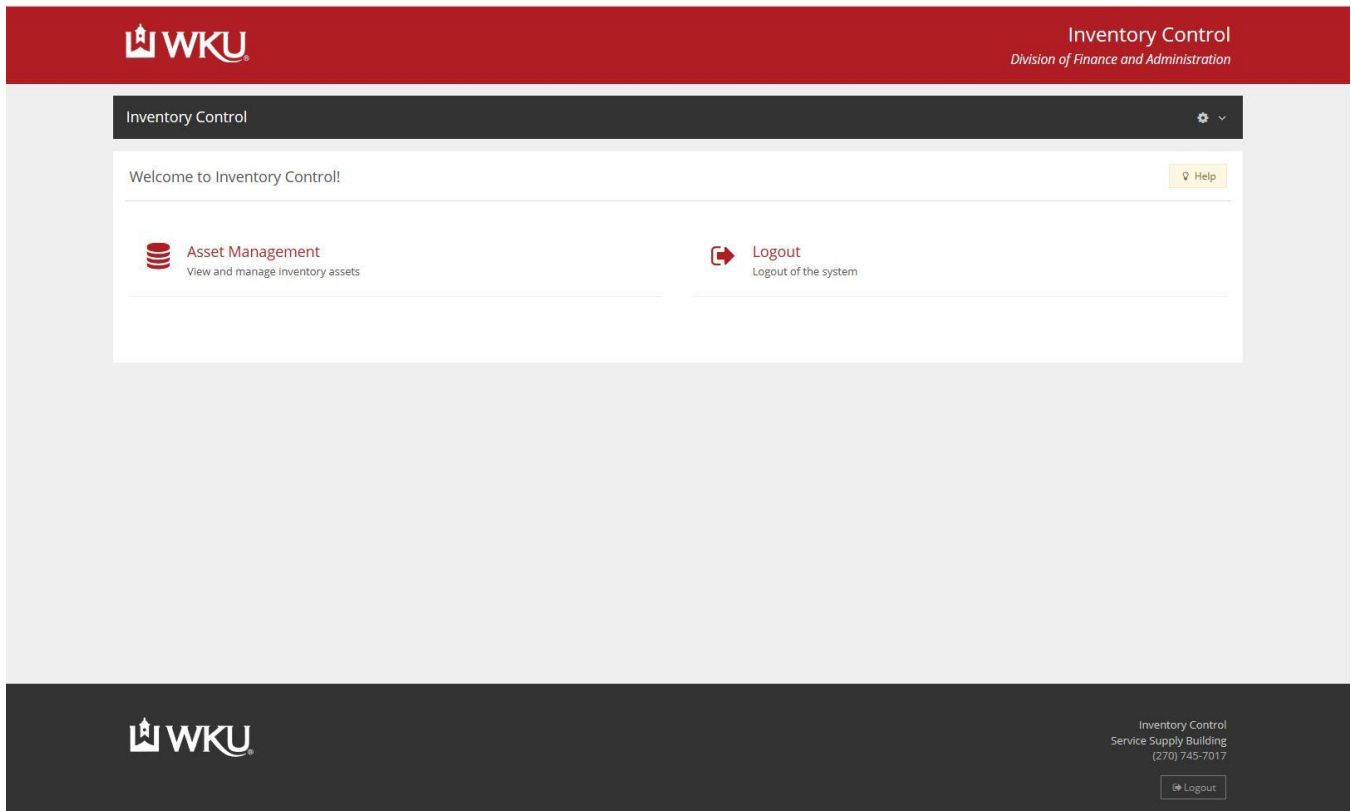
- After selecting Asset Management, you will see *My Untagged Assets:*
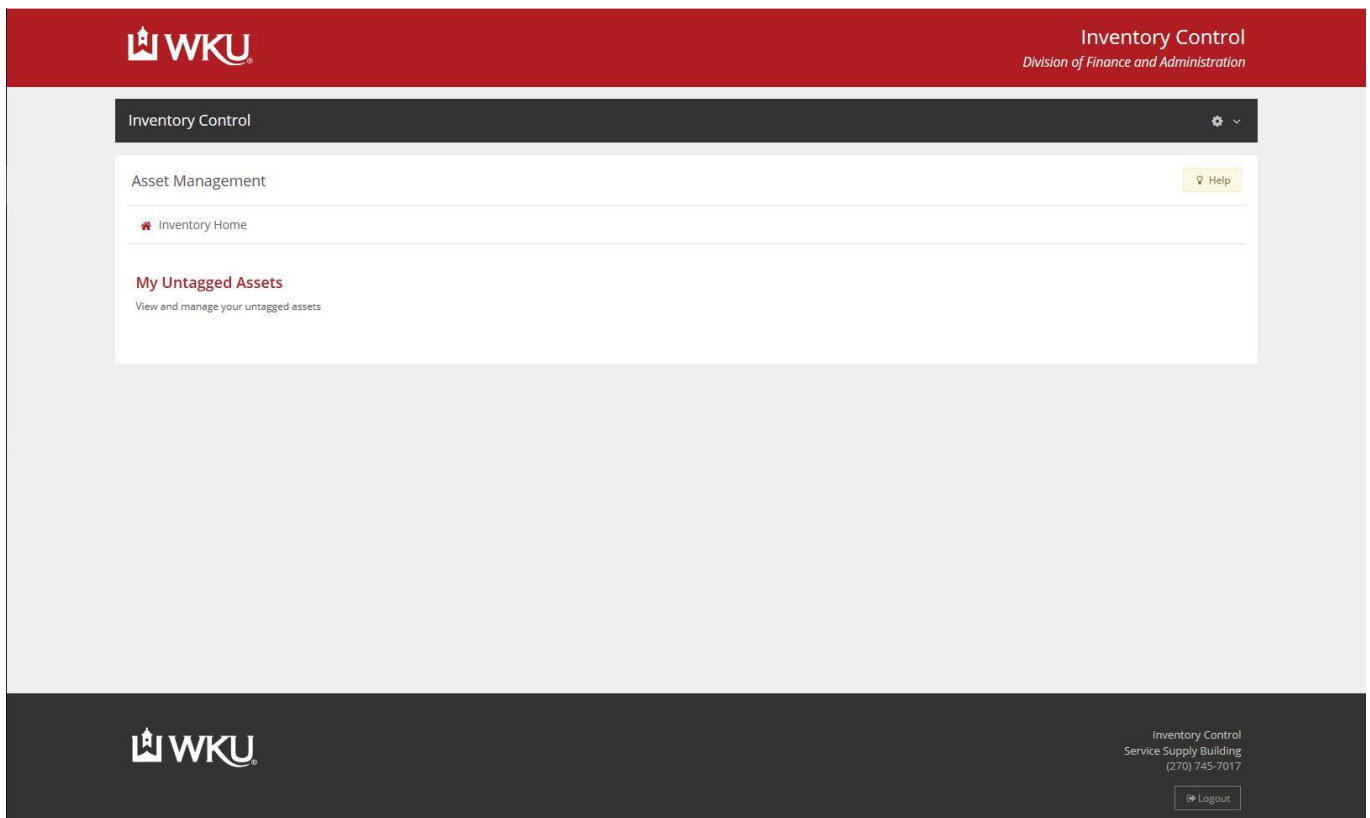
Asset Management – My Untagged Assets

- After clicking on *My Untagged Assets*, you will be directed to this page:

Assets are assigned to each department based on the requestor and departmental code used on the PO.
- o A breakdown of the columns is as follows:
  - Date: When the asset becomes available for tagging.
  - PO: The order number associated with the asset.
  - Identifier: The first number is the order item number, the second number is the Origination Tag. For example, '3-T00105776' would translate to order item #3 and Otag T00105776.
  - Index: The departmental index code associated with the asset on the PO.
  - Description: A general description of the asset ordered.
  - Cost: Dollar amount of the asset.
  - Status: The current status of the asset.
    - Needs Info: Asset needs information entered by the order requestor.
    - Pending Review: The information entered by the requestor needs to be reviewed by Inventory Control.
    - Tag Ready: The asset has been reviewed by Inventory Control and is ready to be tagged.
  - Scheduled Date: The date that the requestor specified for Inventory Control to tag the asset.
  - Scheduled Time: The time that the requestor will be available for Inventory Control to tag the asset.
  - Actions: Allows edit options so the requestor can modify the information entered on an asset and modify specified scheduling.

- In some situations, you may be responsible for managing assets for one or more departmental index numbers; regardless of whether you were the person whom submitted the purchase order. The *Search By Index* feature, will allow you to view a list of untagged assets tied to a specific index number rather than by requestor.

- o After clicking the *Search By Index* link, you will be presented with a list of departmental index numbers you have access to. Select one or more index numbers, then hit *Submit* to see a list of associating untagged assets.

- o You can remove the index selection by clicking the *Clear Indexes* link. This will return you to a list of untagged assets from which you are listed as the requestor (i.e. assets you put in a purchase order for).

Editing your Assets

- To edit an asset and schedule tagging, begin by clicking on the *Edit* button under 'Actions':

- Asset Management – Edit screen:

How to Enter Asset Information

- o On the *Asset Management – Edit* screen, you will see a list of fields that indicate which information we need from you in order to schedule the tagging of the asset.
- o Purchase Information: Some purchase information will automatically populate.
  - ▪ Date, PO, Requestor, Vendor, Unit Price, Asset Identifier, Dept Index, Ship To, and Item Description will automatically populate.
- o General Information: This header contains fields that need to be filled out for the asset.
  - ▪ Acquistion Date: When did the the University acquire this asset?
  - ▪ In Service Date: When was the asset first installed or received?
  - ▪ Equipment Manager Email: Who is responsible for the asset?
  - ▪ Asset Location: Building and room number where the asset will be located.
    - When entering the location, a drop down menu will assist you in finding the correct building and room number.
- o Asset Information: This section is used to enter in the specifics of the asset you need to have tagged.
  - ▪ Serial #: A unique code used to identify an asset.
  - ▪ Make: The manufacturers trade name of the asset.
  - ▪ Model: An identifier of an asset given by its manufacturer.
  - ▪ Manufacturer: The name of the company or person who provided the asset.
- o Tagging Availability
  - ▪ Date: Which date (or dates) are you available for someone to tag your asset.
    - By clicking within the grey field, you can select the date from a drop down list.
    - You may add as many dates as you wish. Adding more than one date will help us accommodate your availability.
  - ▪ Start Time: The earliest time you will be available on the designated date.
    - By clicking within the grey field, you can select the time from a drop down list.
  - ▪ End Time: The time you will no longer be available on the designated date.
    - By clicking within the grey field, you can select the time from a drop down list.
- o After you fill out all of the necessary fields, select *Update Asset* to save your changes.

- After you enter the asset information, you will see a message that indicates that changes were saved:
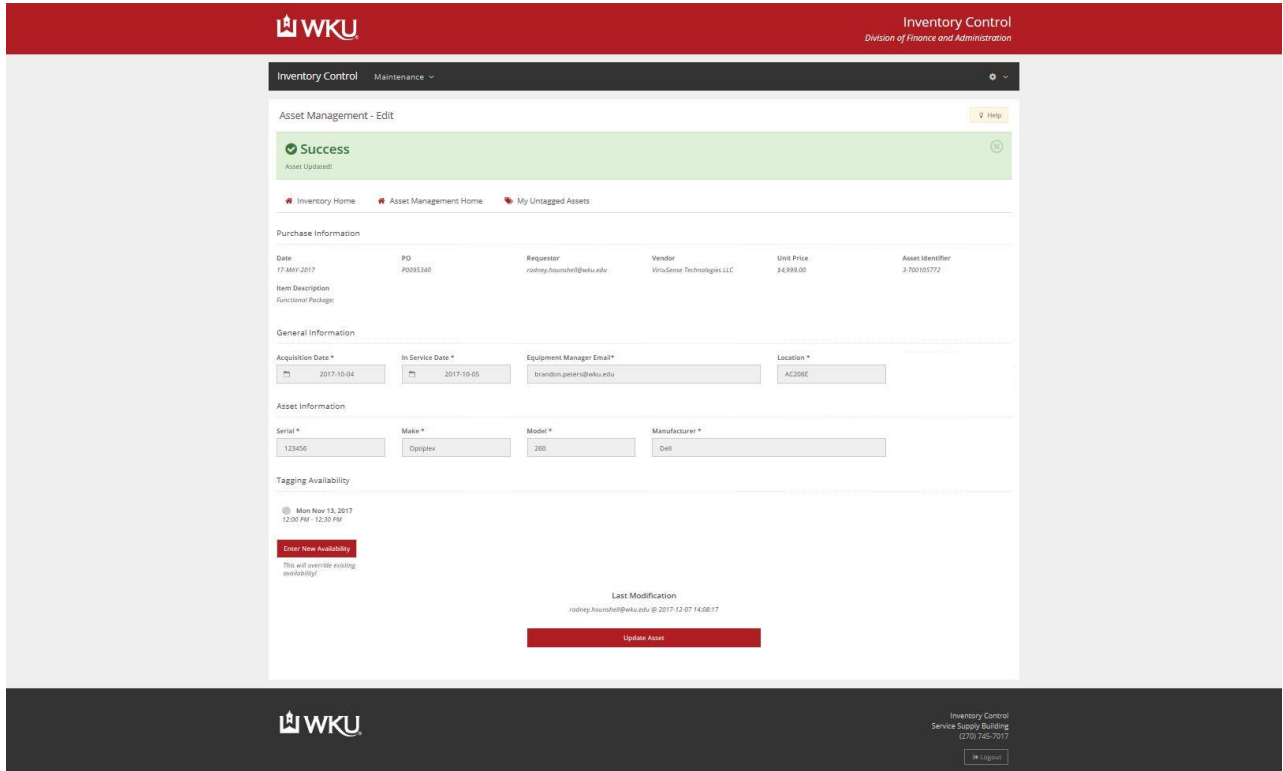
- When you return to the *My Untagged Assets* webpage, you will see that the asset status is now *Pending Review:*
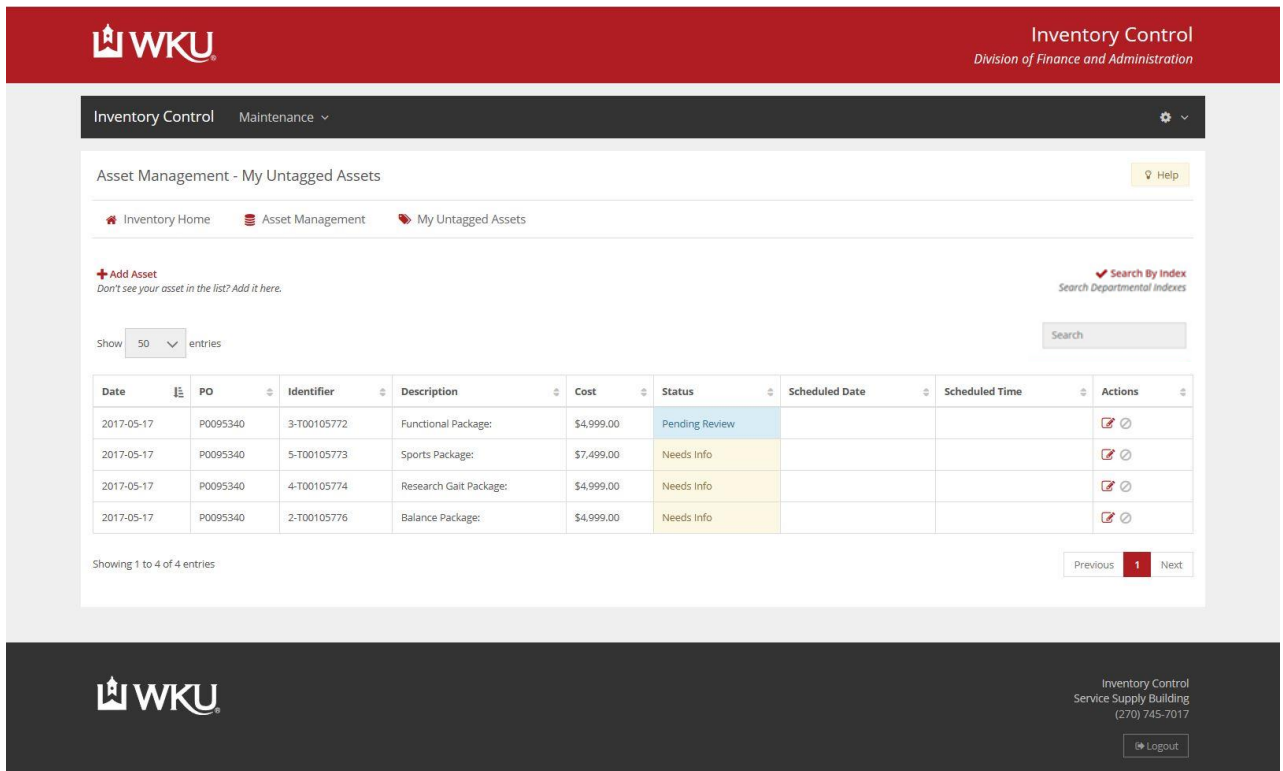
  o The Inventory Control Coordinator will be notified of the asset update and will verify your request.

- After the Inventory Control Coordinator has verified your request, the status will change to *Tag Ready*.

- You will receive an email update that confirms the tagging has been scheduled.

From: Inventory Control
Sent: Thursday, December 7, 2017 11:24 AM
To: Peters, Brandon <brandon.peters@wku.edu>
Subject: Inventory Control: Asset Ready for Tagging

Greetings!

This is a status update from the WKU Inventory Control department regarding an asset that you recently updated information for.

This asset has now been reviewed and scheduled for ICN tagging. If you need to re-schedule, please do so from the Inventory Control website listed below. If not, an inventory control representative will be arriving at the scheduled date/time to tag this asset:

Requestor: brandon.peters@wku.edu
PO: P0098000
Asset Identifier: 21
Vendor: Dell Premier

You may login to the Inventory Control website using your NetID credentials here:
https://app.wku.edu/inventory

WKU Inventory Control
Service Supply Building
(270) 745-7017

How to Enter Asset Information for Multiple Assets

- If multiple assets are detected for a given PO, you will be presented with this message towards the bottom of the "Asset Management – Edit" form:

Multiple Assets Found

There are 151 assets tied to the same PO and PO line item. To save time, choose 1 or more fields within the ☑ **Copy to All Assets** section below. Then click **Update Asset** and ALL assets will be pre-populated with the same value.

Note: Only choose fields in which the value will be exactly the same for all assets. For example, *Serial* number cannot be pre-populated as this value is unique to each asset.

☑ Copy to All Assets

☐ Acquisition Date
☐ In Service Date
☐ Equipment Manager Email
☐ Asset Location
☐ Make
☐ Model
☐ Manufacturer
☐ Tagging Availability

Update Asset

- o This function allows you to choose which fields you would like to "Copy to All Assets".
  - ▪ This function can be used at any time, and it can be repeated as many times as necessary.
    - For example, if a user accidentally updated all assets with the wrong "In Service Date", they could simply correct it on any asset form and then select that field.
    - You also have the option to leave all of the fields un-checked which will then ONLY update the specific asset you have selected.

How to Edit Availability

- Click on the *Edit* button under the *Actions* subheader.

- Click on *Enter New Availability* and enter in the appropriate information. After completing, select *Update Asset*.

Requesting Early Asset Tagging

- This section is only used to request a tag for an asset that is not yet showing up in *My Untagged Assets*:
- Select *Add Asset* near the top of the webpage:
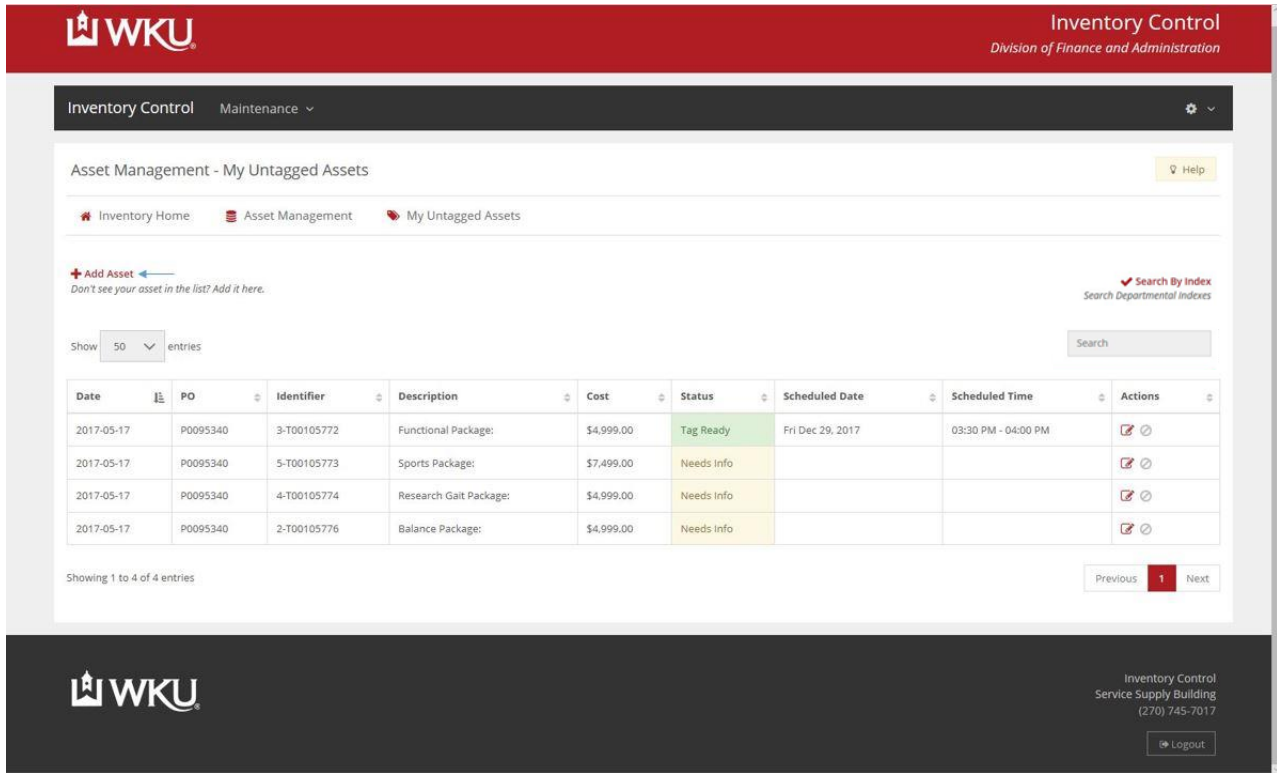
- Add Purchase Order information under the *General Information* subheader and select *Validate Purchase Order*
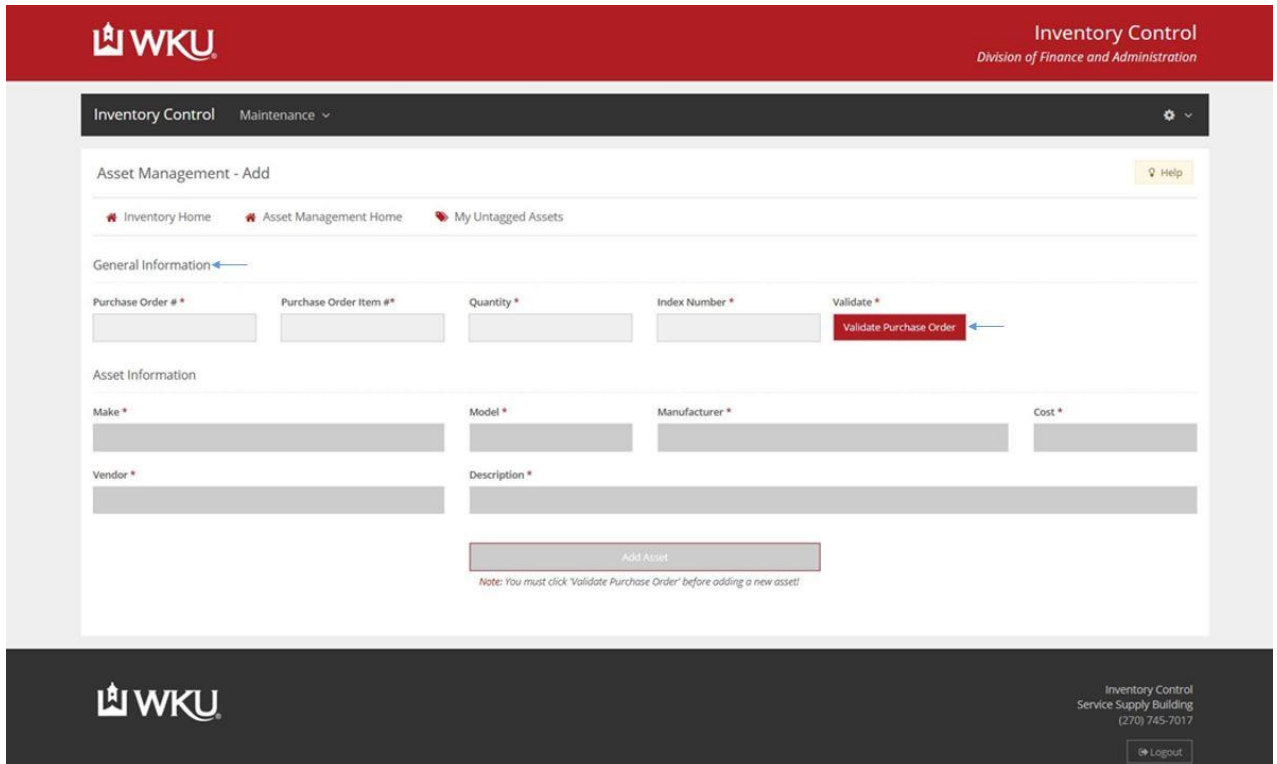
  - After entering PO information, select *Validate Purchase Order*.

- After validating, enter *Asset Information*:
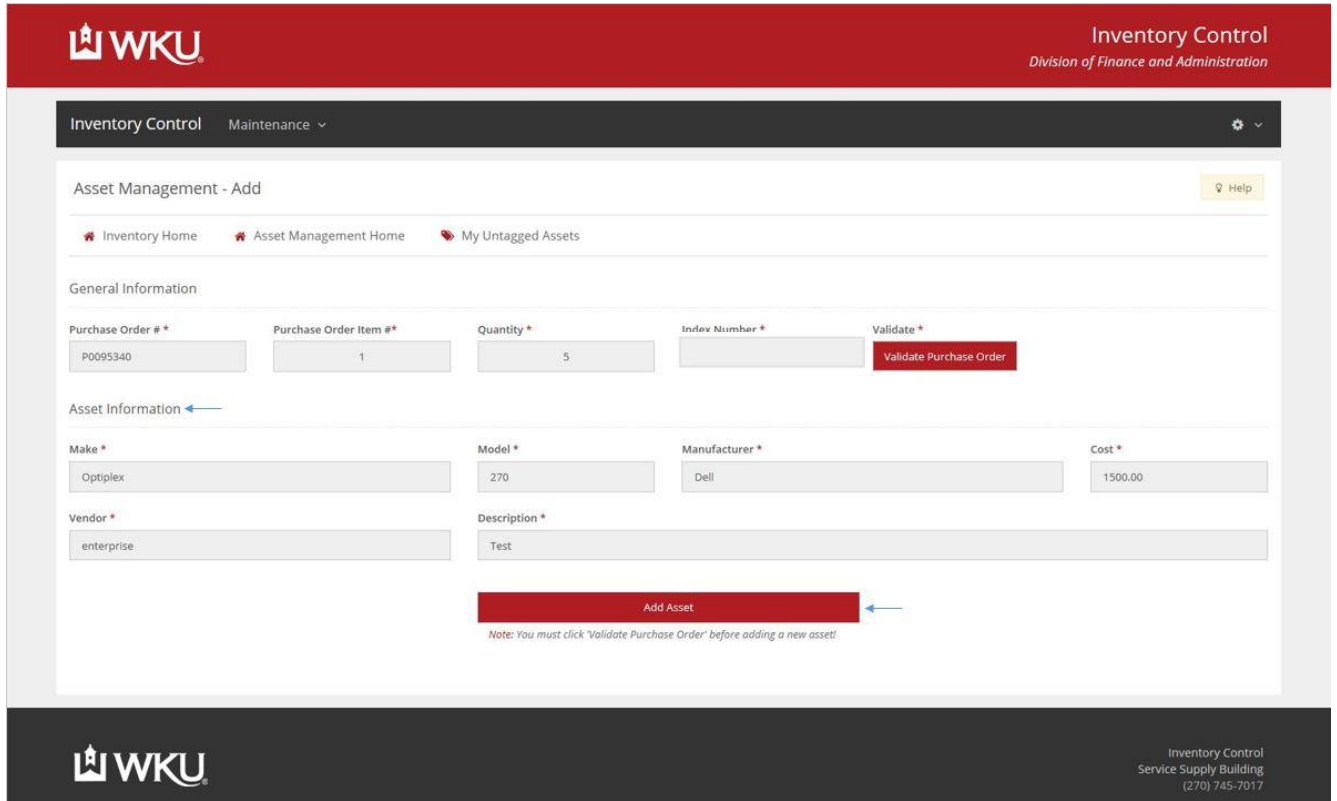
  o After everything is filled out, select *Add Asset.*

- When you select *Add Asset*, you will be returned to the *My Untagged Assets* page.
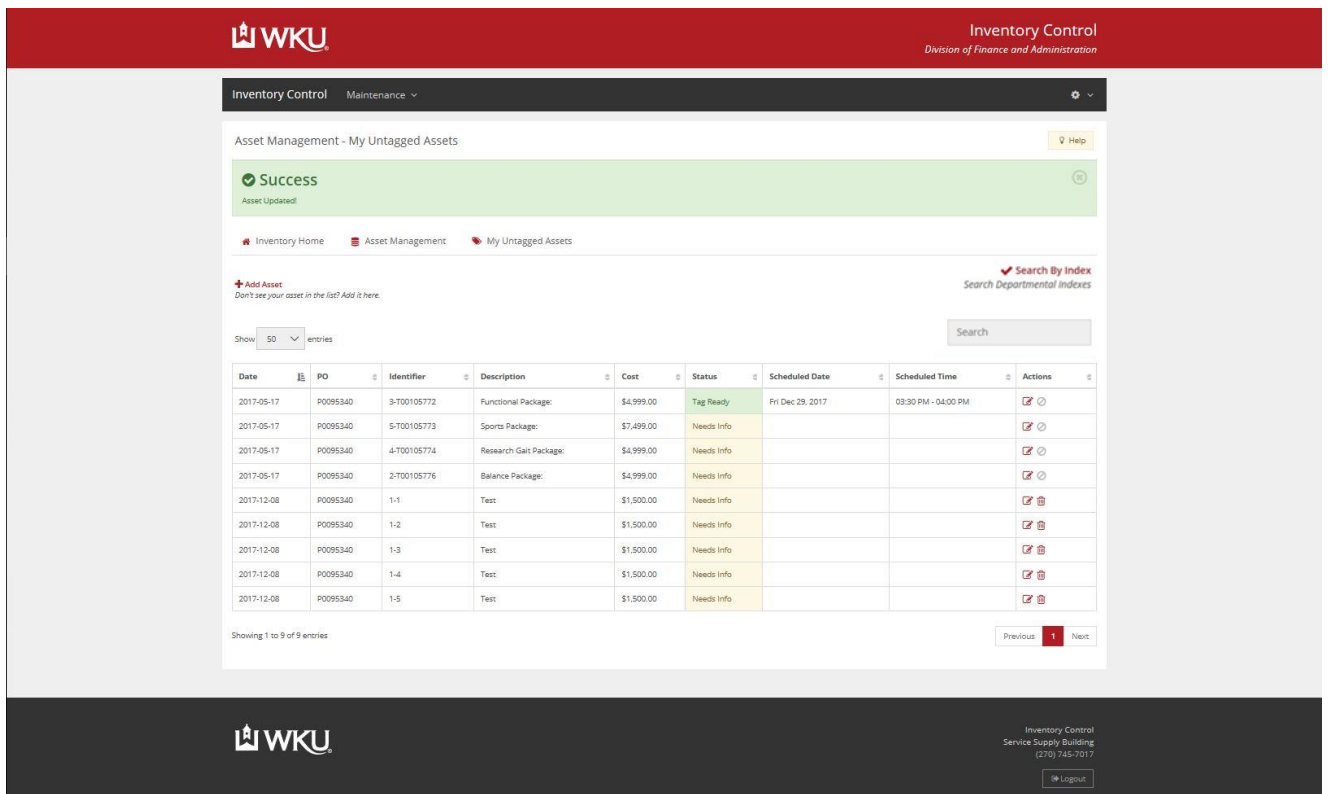
Deleting an Early Asset Tagging Request

- In the event that an asset tagging request was created in error, you can delete it by selecting the Trash Bin Icon:

- When you select the Trash Bin Icon, you will be directed to this screen where you can select *Delete Asset*:

<u>Summary</u>

Let's review:

As a result of completing Phase I of this tutorial, you have

- Navigated the User Interface
- Checked your Untagged Assets
- Edited your Assets
- Entered Asset information
- Scheduled Tagging
- Edited Availability
- Requested Early Tagging
- Deleted an Early Tagging Request

Quick Reference

Development Phases	Description	Rollout Date
Phase I	**General asset tagging**	**08/14/2018**
Phase II	Asset transfers and disposals	TBA
Phase III	Annual Inventory	TBA

Phase II

Introduction

Phase II handles the access and transfer of assets. In this Phase, you will learn how to add users to indexes in the web app in order to edit asset information and eventually as we move forward with Phase II, we will implement a full transfer system which will streamline the way that transfers are completed University-wide. If you would like to request training in the new system, please contact WKU Inventory Control at inventorycontrol@wku.edu.

How to Log In

- Visit the WKU Inventory Control website at: https://app.wku.edu/inventory

- Log in using your WKU NetID and Password:

Requesting Authorization to Edit Assets

- In order to gain access to add/edit assets, the department head must first sign off on a document titled "Internal Index Access Form" which gives the specified user access to edit asset information for the index(es) listed on the form. This form can be found @ https://www.wku.edu/supplychainmanagement/inventory/.
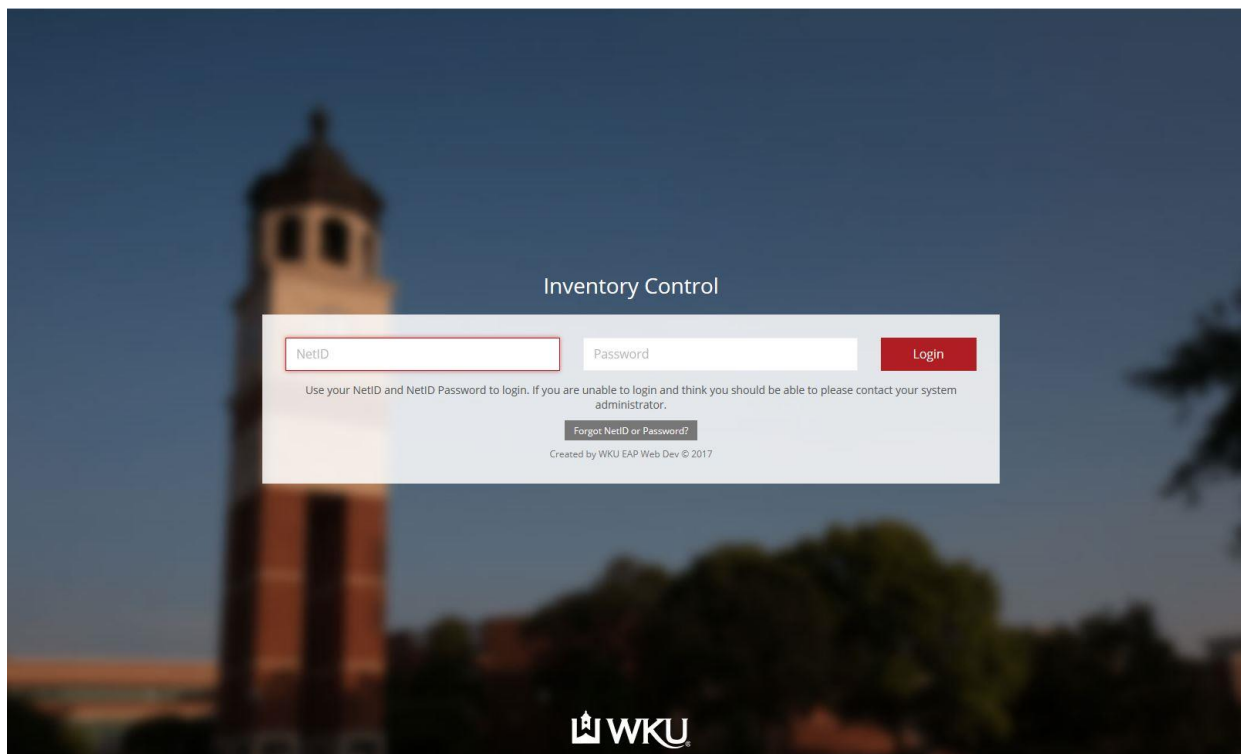
    o Note: Requesting access to indexes outside of the permitted departmental reach is prohibited.
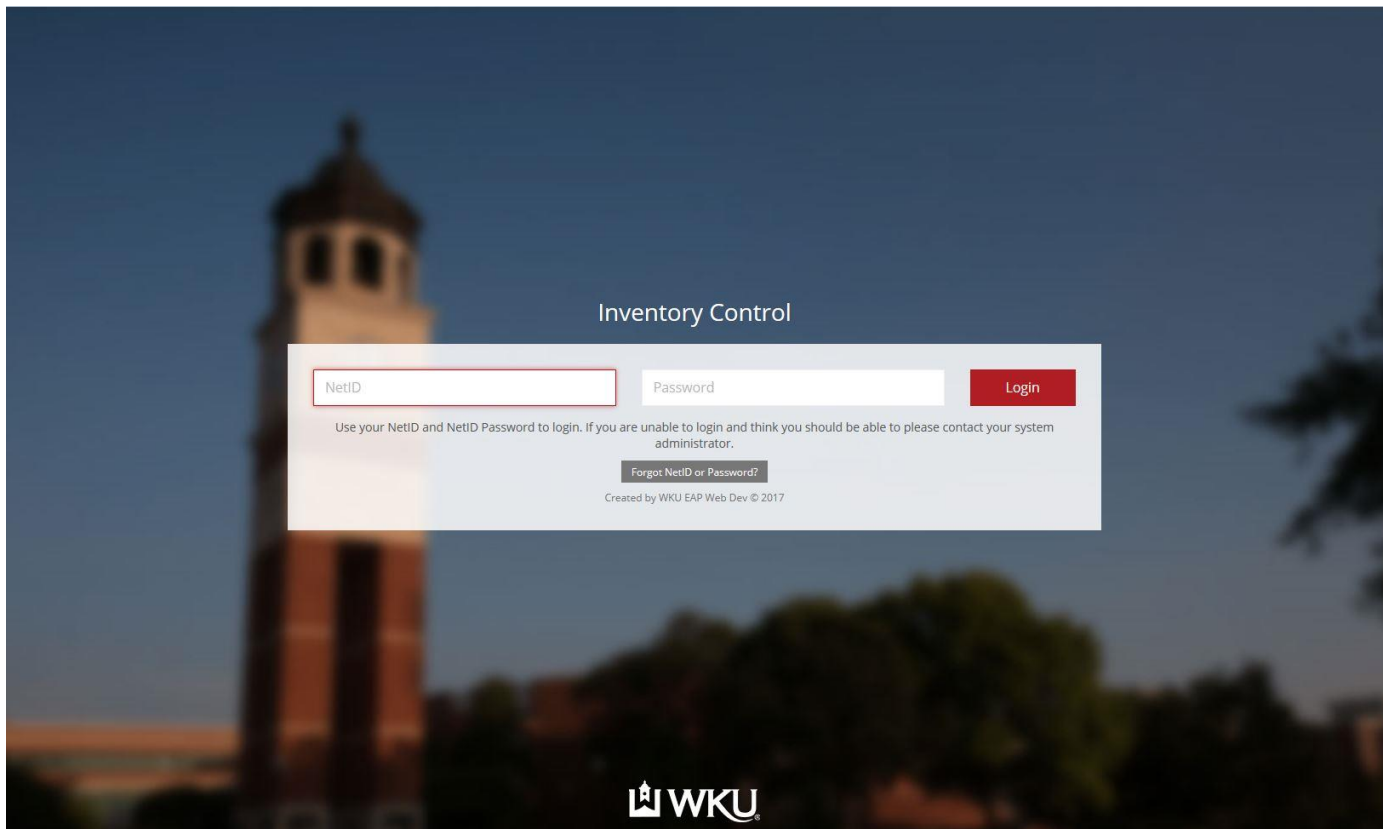
Transfers Between Departments

- Visit the WKU Inventory Control website at: https://app.wku.edu/inventory
- Log in using your WKU NetID and Password:

After logging in, please click on the Transfers Link:

Transfers

View and manage asset transfer requests.

After clicking on the transfers radial button, you will be directed to this page:
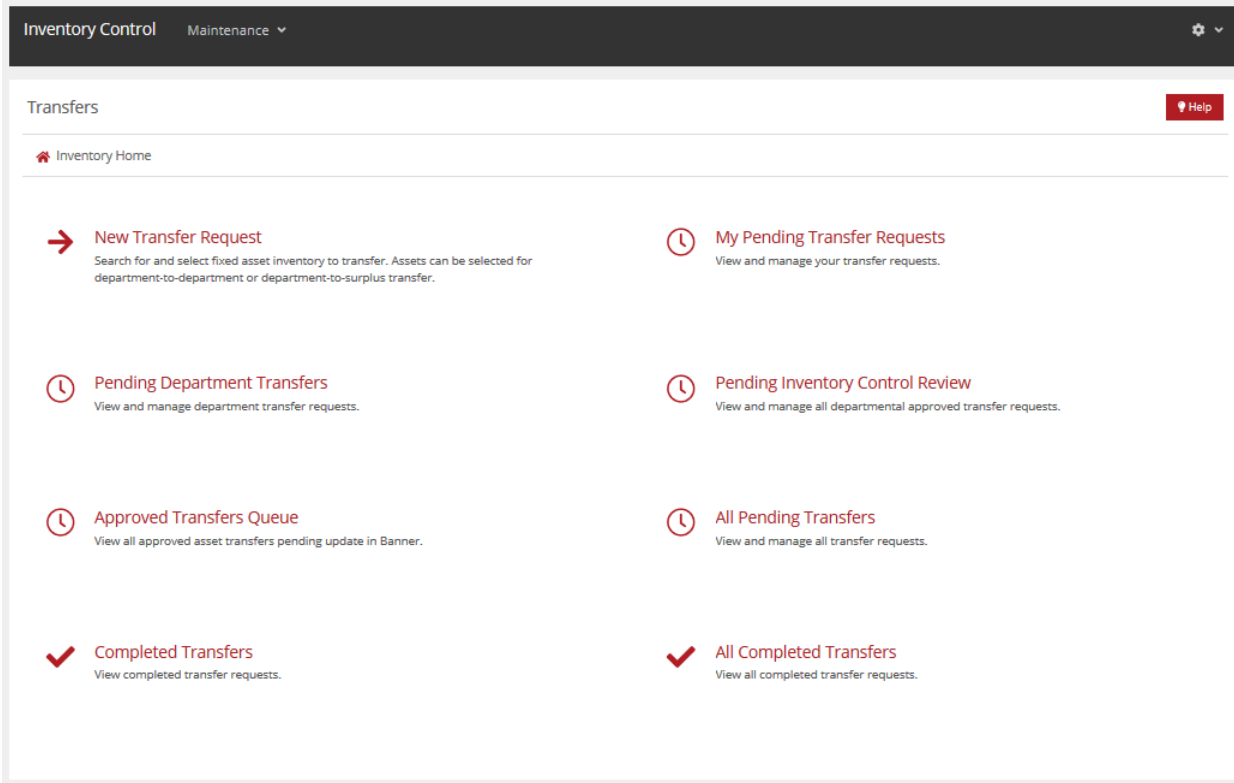
By pressing on the radial titled "New Transfer Request" you will be directed here:
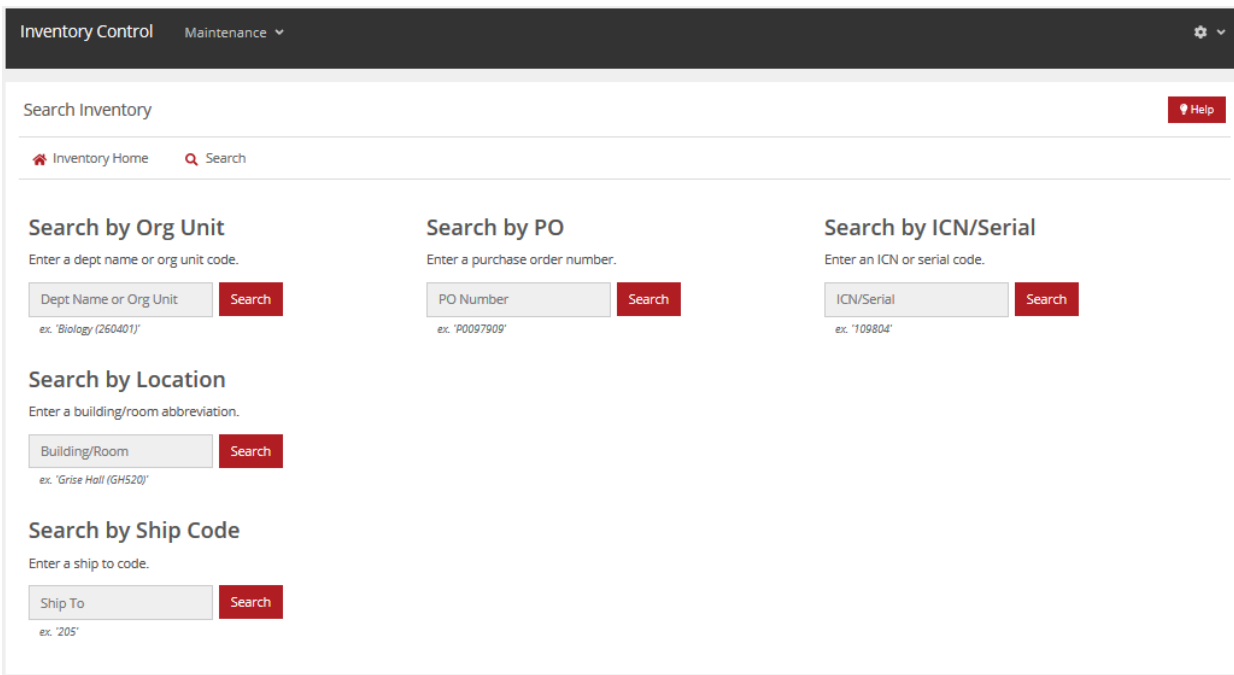
In order to search for an asset, enter information into any of the fields and press 'Search'
- For this example we used ICN# 5005000
- After pressing search, you will be directed here:
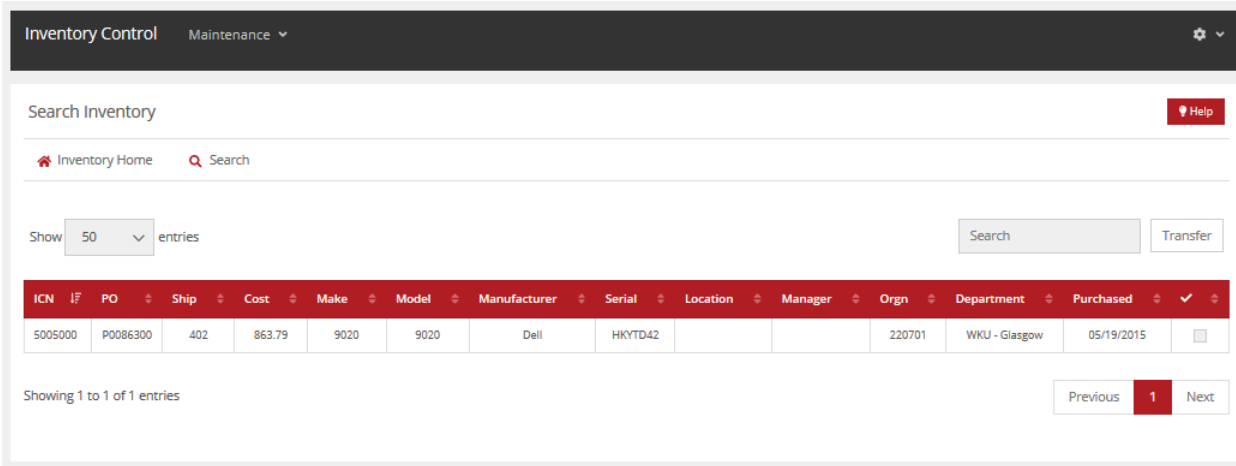
Press the red radial to the very right of the data and select Transfer at the top next to 'Search'
- For this example we will first go over how to transfer to 'Department'
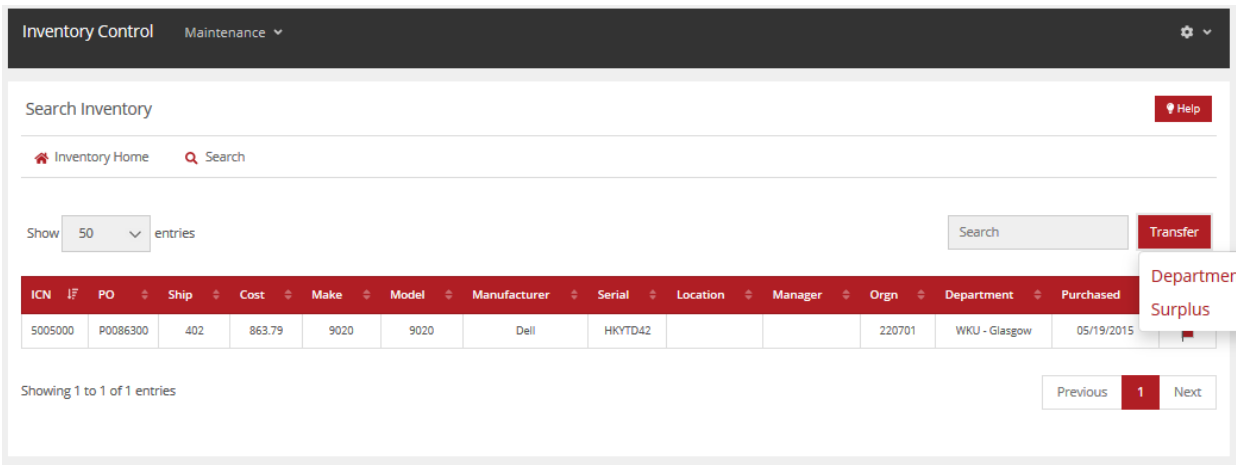
After clicking on 'Department' you will be directed here

There are several fields that need to be filled out in order for the transfer to be submitted

1. Transfer to Department

    a. Enter the name of the department you want to transfer to and select it

    b. Some pre-defined information will automatically populate

2. Transfer to Location

    a. Enter the name of the location you want to transfer to and select it

3. Transfer to Ship To Code

    a. Optional

    b. If you know the ship to code of the department you are transferring to, enter it here.

    c. This can be filled out later on by the department or Inventory Control Coordinator

4. Equipment Manager

    a. Optional

    b. Enter the name of the equipment manager you want to transfer to and select it

    c. Some pre-defined information will automatically populate

    d. This can be filled out later on by the department

5. Transfer Reason

    a. Enter the reason for transfer and/or any notes.

Here is an example of how the submission should look

After entering all of the information, click on 'submit request' and you will directed here:

- All Transfer requests you have made as the requestor will populate here.

Next up we will cover 'Pending Department Transfers' which can be accessed through this radial button:

Pending Department Transfers
View and manage department transfer requests.

After selecting the radial button, you will be directed to this page

- This is what the receiving department sees as soon as the transferring department completes their request.

In order to access and approve the transfer, the receiving personnel must first select the check mark radial.

By Selecting the check mark radial, the receiving personnel will be directed here:

There are several actions to take on this page:

1. Verify that all information is correct

2. Fill in the ship to code if it was not previously filled in

3. Fill in the equipment manager if they were not previously assigned

4. Select the radial button next to all of the assets that you approve of transferring (will turn red)

5. Add a review comment, and select 'Approve Request'

After selecting 'Approve Request' you will be directed back to this page

- The Inventory Control Coordinator will be notified of your submission and will approve the submission or reach out with further questions.
- This is the last step the receiving department needs to take before transfer completion.

Transfers to Surplus

- Visit the WKU Inventory Control website at: https://app.wku.edu/inventory
- Log in using your WKU NetID and Password:

After logging in, please click on the Transfers Link:

After clicking on the transfers radial button, you will be directed to this page:

By pressing on the radial titled "New Transfer Request" you will be directed here:
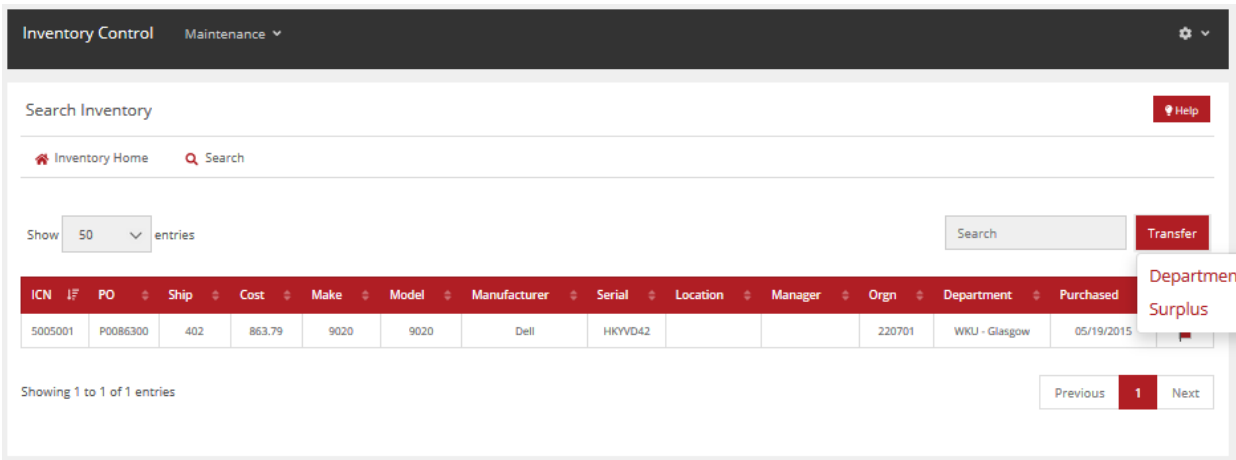
In order to search for an asset, enter information into any of the fields and press 'Search'
- For this example we used ICN# 5005001
- After pressing search, you will be directed here:
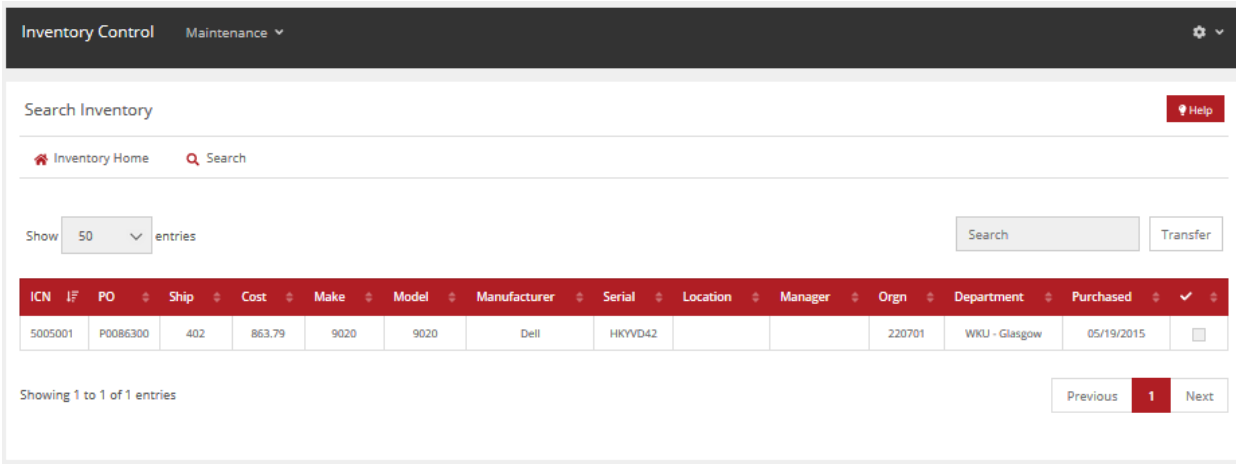
Press the red radial to the very right of the data and select Transfer at the top next to 'Search'
- For this example we will first go over how to transfer to 'Surplus'

After selecting 'Surplus' the requestor will be directed here:

- Transfer reason is required
- After reason entered, press submit request

At this time, the user will be sent back to their pending transfer request dashboard:

- Surplus will review your request and accept or reject your transfer data.