

# **UDT Asset Tracking & Management System**

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# **USER & INFORMATION GUIDE**

# **ACCOUNT CREATION @ ACCESS**

ATMS is built on the Zoho Creator platform. You will receive an email from the Zoho Team <<u>noreply@zohoaccounts.com</u>> depicted below. Check your spam folder for the email. Contact the TIS district office if you do not receive the email.

1. Click on "Accept Invitation" (See below)

				~
ZOHO Creator				
You've been invited to use an application 'ATMS DEMO' built on Zoho <u>"solutionsengineers@udtonline.com"</u> .	Creator b	by		
Accept the invitation to join their org and access the Accept Invitation	appli	catio	n	
Zoho Creator helps organizations fix inefficient processes, keep data organized, and packaged software. You can build your own apps too: Find out how to g	overcon	ne limita <u>d »</u>	ations o	r

2. Enter your Full Name and provide a Zoho Creator specific password. Initial access to the platform requires the creation of a unique password.



Create a	Zoho Account
Full Name	you're one step away
Password	Show
By Creating an Account, I agree to t	the Terms of Services and Privacy Policy
Create Account	

3. Click on "Accept Invitation"



# **UDT Asset Tracking & Management System**



You should now have access and be directed to the Leon County Schools ATMS. You may be required to authenticate.

If not, please go to the next step.

4. Make sure to save the link to the website for future access. https://creatorapp.zoho.com/udtorlando/leon-county-schools#Dashboards



5. Type your LCS email address, if you do not have immediate access to the Leon County Schools ATMS and are directed to the following login screen. Utilize the Authenticator.





### INTRODUCTION

This document provides guidance for Users of the Asset Tracking & Management System (ATMS) for the Leon County School District.

It is divided into sections that correspond with the Main Menu of ATMS. Options vary based upon User permissions within ATMS.

To start ATMS, use a web browser and navigate to the ATMS website/URL.

https://creatorapp.zoho.com/udtorlando/leon-county-schools#Dashboards

Dashboards		General	Information	
Assets >	-		174 - 174 - 1940	
Users >		Tota	al Assets	
Logs		66,	116 🖪	
Fees >	-			
Rules		2		444
Reports >		Assigned Assets	00 Unassi	,114 Ined Assets
Workflows >				
Settings >		34 To	<b>1,303</b> tal Users	
		Asse	ts Charts	
	Asset by Status		Assets by Chassis Type	
		Assets	As	iets
	Asset by Status	Assets	ts Charts Assets by Chassis Type	ets:

The Leon ATMS Dashboard Screen (as of July 2024)



# **ATMS MAIN MENU**

The main menu is displayed below. This guide will present topics in this order. Note: Menu items are visible based upon User permissions.

	ர Leon Count	
e	Dashboards	
₫	Assets	>
٢	Agent Information	>
8	Users	>
٠	Logs	
-	Fees	>
÷	Rules	
÷	Reports	>
e	Workflows	>
Ç	Settings	>
þ	Stock	
	Jacquelyn Crutchfie	Δ

**ATMS Main Menu** 



# DASHBOARDS

The first screen for the Leon County ATMS application is the Dashboards. It is the first selection from the main menu and provides various options to Users with permissions to view asset information within the Leon County Schools system. It allows a quick view of assets within ATMS by providing links to view the data.

Dashboards	General Information			
Assets		Total Assets		Total Users
Logs		66,116 🖪		→ 33,640 음
Fees				
Rules		45.070		50 407
Reports		Assigned Assets	_	> 50,137
Workflows	»	ASSENCE ASSES		Unossigned Assets
Settings	<b>&gt;</b> .		Assats Charts	
Repair Services	5		Assets Charts	
	Asset by Status		Assets by Asset	Туре
		Assets		Assets
	60.000		(0.000	_
lacquelyn Crutchfie	o = 50,000		50,000	



The logged-on user displays at the bottom left of the screen. The **blue arrows** depict key information that provides a quick link to asset and user information. For example, **clicking** on **Total Assets** will display a Report of available stock. **Clicking** on **Assigned Assets** will display a view of assigned assets. **Total Users** displays the number of active users in the Google Console. Additional reports are available from the Dashboard.

The orange arrow notes the Scroll Bar providing access to more information. Scrolling down provides additional sets of data included on the dashboard.





### **Dashboard – Additional Information**

Hover the mouse over the color bars to see the actual number of assets. On the screen above, hovering the mouse indicates the *Lost* bar showing a total of 4,067. Please note counts include HP devices that may be assigned or retrieved. HP devices will not be entered for repair.



**Dashboard – Additional Information Displayed** 

* 35, * Ally + C & C + * 300 500 C + 1 + 1 + 1 + 1 + 1 + 1 + 1 + 1 + 1 +	
Asset Model	
Assets by Location	
12,000	
> 9,000	
Assets 0531:1,878	
3,000	
and and and and and area area and and area and area and area	
	Assets by Location

Dashboard – Additional Information as A Quick View

The lower portion of the Dashboards screen depicts the asset by location. Hovering over *0531* (Fairview Middle) displays a total of *1,878* devices.

# ASSETS

Clicking on Assets in the main menu will display a drop-down of links to view assets.



#### Assets Sub Menu Items



### **Assets View**

The Asset View will display the following information.

- 1. Students assigned to devices.
- 2. The status of devices (Operational/Repair/Recycle...).
- 3. The data sets in the asset view will also be used in the repair workflow.
- 4. Display the number of available devices at each school.
- 5. View User Activity for individual assets.

Click Assets View to load a report of assets within the system.

Leon Count	Assets View		Q =
Dashboards	Asset Serial Number * Hostname	- Asset Type	<ul> <li>Asset Model Number</li> </ul>
_ Assets ~	YX0993GX	Chromebook	Lenovo 100e Chromebook C
🖆 View Chromebooks	VX/003H0 Asset Notes	Chromebook	Lenovo 100e Chromebook C
💂 Assets View	TAUYYSINA	Chromebook	Lenovo 100e Chromebook C
L View Intune	YX0993G8	Chromebook	Lenovo 100e Chromebook C
Add Notes	YX0993M7	Chromebook	Lenovo 100e Chromebook C
Agent Information	ухоясамр	Chromebook	Lenovo 100e Chromebook C
) Users >	УХ09CGBH	Chromebook	Lenovo 100e Chromebook C
J Logs			
Fees >	YX09BEXQ	Chromebook	Lenovo 100e Chromebook C
🛛 Rules	YX0993KW	Chromebook	Lenovo 100e Chromebook C
Reports	VVN003VI	Chromohaal	Innous 1000 Chromobook

#### **Assets Main View**



- 1. Click the three dots to the left of the asset.
- 2. Click Asset Notes. A separate tab will open the Asset Notes report. *Pop-up blocker may appear, choose Allow.*
- 3. Click the Note Line Item. The report may be printed or duplicated. (see below)

**Click** on any of the column headers to view options to search, sort, or group the data or hide the column.

Hostname

Sort by Ascending

Sort by Descending

Group by Ascending

Group by Descending

Hide Column



4. Click the "x" to Close.

>	đ Duplicate Print X
Serial Number	YX09C0SD
Notes	crutchfield 2

The **Print** and **Export** options are available from the **Menu** icon.

		Q =
	Show as	lore Option
ion	. List	~
003	Calendar	
	Timeline	
	Kanban	
	Print	,
	Import	
	Export	,

#### Assets Menu Options/Print & Export Menu

Click on the small triangle to the right of *Print* to reveal the available printing options. Click on the small triangle to the right of *Export* to reveal the supported export formats.

		- Asset Type	Show as
Show as		Chromebook	Print +
		Chromebook	Import
Print		Chromebook	Export •
		Chromobook	XLSX
Print as list		Chromebook	PDF
Print as Summary		Chromoback	HTML
			XML
Import		Chromebook	.150N
		Chromebook	CSV
Export	2.00	Constant	TSV



There are additional columns of data. Use the **scrollbar** at the bottom of the screen to move left or right to view the columns of viewable data per User permissions.

4	
	Scroll Bar

**Click** anywhere on a line to display a quick overview of that record. Users may go to the previous < or the next > record, *Print* the record, or view any *Asset Notes*. Note: Disable the Pop-up blocker as needed.

Leon Count	Assets View				<>	Asset Notes User Notes More ~
Dashboards	SEARCH Asset Serial	Number contains "YX09C05D"			Asset Serial Number	YX09 Print
Assets	K reb RAM (Chrome	bo * Inventory Check D *	Inventoried User -	Inventoried Fi	Asset Model Number	Lenovo 100e Chromebook Gen 4
Assets View	D 4 GB	17-Jul-2024	crutchfieldj@leonsch	Asset_Invento	Asset Custom Tag	
View Chromebooks	View Chromebooks		oois.net	eck	Asset Location	Adult Ed - 9003
View Intune					Asset Status	Operational
View Monitors					Assigned Group	
Add Notes					Checked Out	Yes

#### **Quick Overview Display**

The **Asset Notes** button (above) is a link to the Asset Notes report. The Asset Notes report will open in a separate tab. At the bottom left of the screen, ATMS shows the number of items in the current data view. ATMS displays a **###** when the total is greater than 1,000. Click on the **###** to see the total number of items in the current view. (see below)

	Showing 1000 of ###
_	



### **UDT Asset Tracking & Management System**

The <u>Assets View</u> allows for searching devices and is the same in the View Chromebooks menu (discussed on page 14). The report is presents as an Excel layout and can be filtered/searched by Selecting the Magnifier Icon or the Down Arrow of the **Column > Search**.

Asset Serial Number	- Ho
Search	
Sort by Ascending	
Sort by Descending	
Group by Ascending	
Group by Descending	
Hide Column	
YX09D1AS	



#### Search Options Via Asset and Chromebook View

- 1. Click the Search Option **Down Arrow > Search** or the **Magnifier Icon**
- 2. Select the Desired Column Criteria (check boxes)
- 3. Include Additional fields as needed (Click enter to Select)
- 4. Red Asterisk will Appear noting multiple views are available. (see page 14)
- 5. View criteria may not be edited. Create a new Search. Name the Search. Save.

-	odel Number Delete - Asset Custo	om Tag - Asset Status -	Asset Location - Asset Locat
Asset Serial Number	100e Chromebook Gen 4	Operational	Fairview Middle - 0451 0451
Hostname			
	LOOe Chromebook Gen 4	Operational	Fairview Middle - 0451 0451
Asset Type	100e Chromebook Gen 4	Operational	Fairview Middle - 0451 0451
Asset Model Number			
	100e Chromebook Gen 4	Operational	Fairview Middle - 0451 0451
Contains 👻	100e Chromebook Gen 4	Operational	Fairview Middle - 0451 0451
× Lenovo			
	LOOe Chromebook Gen 4	Operational	Fairview Middle - 0451 0451
Asset Custom Tag	100e Chromebook Gen 4	Operational	Fairview Middle - 0451 0451
Asset Status	LODe Chromebook Gen 4	Operational	Fairview Middle - 0451 0451
Asset Location	100e Chromebook Gen 4	Operational	Fairview Middle - 0451 0451
Contains 👻 🔗 🖷	L00e Chromebook Gen 4	Operational	Fairview Middle - 0451 0451
× Fairview	Ma Abasarbash Pan A	Annalised	Paladan MilaBa AARA AARA
	Showing 750 of 750		

#### **Search Criteria and Fairview Report**



Users may create a Favorite View to Create a Customize search:

- 1. Click Search Option.
- 2. Select Criteria (as shown Above).
- 3. Name the Favorite Report View.
- 4. Click Save Changes.
- 5. To Remove, Choose Remove Changes
- 6. These Customized options are unique to the user.

lemind 🛛 👷 UDT - Leon County Scho 🍕 Cop	pilot		
Assets View * Save Change	s Remove Changes		
SEARCH Asset Model Number cont	ains "Lenov O Asset Locati	ion contains "Fairvie O	←
Asset Serial Number	<ul> <li>Hostname</li> </ul>	<ul> <li>Asset Type</li> </ul>	<ul> <li>Asset Model Number</li> </ul>
YX099RGH		Chromebook	Lenovo 100e Chromebook Gen 4
YX09CJ8K		Chromebook	Lenovo 100e Chromebook Gen
YX099R0N		Chromebook	Lenovo 100e Chromebook Gen
		<b>a</b>	

**Customized/Favorite View** 

7. Creates a Drop-Down to Select desired View. (Multiple favorites may be created)



**Assets View Drop-Down** 



# **UDT Asset Tracking & Management System**

View User Activity via the Assets View menu. This report displays Last Sync, Recent Users and the Time Activity device information.

		Another Termina									Q, F
Dashboards		Augustitus:	Assigned User Location	C	Last Sync .	Last Enrollment Ti *	User Activity	Time Activity	OS Version	Platform Version	
Assets	~	(There is a simple description of	0021	U	23-5tp-2024 11:29:26	15-Jul-2024 12:45:07	User Activity	Time Activity	116.0.5845.210	15509.81.0 (Official Build) stable-channel consola	
		energy-thickness of		-	23-Sep-2024 11:36:36	23-Sep-2024 11:36:35	Uter Activity	Time Activity	126.0.6478.252	15886.77.0 (Official Build) Itc-channel consola	
View Chromebooks		(TERPERSION AND ADDRESS OF	0161		23-5ep-2024 11-26-20	20-5ep-2024 10:05:16	User Activity	Time Activity	126.0.6478.251	15886.76.0 (Official Build) Itc-channel consola	
Add Notes		procession in the local division of the			30-May-2024 11:08:25	30-May-2024 11:08:25	User Activity	Time Activity	114.0.5735.358	15437.98.0 (Official Build) stable-channel grunt	
Uters	÷.	CONTRACTOR AND ADDRESS OF	0451		19-Jun-2024 13:04:15	19-Jun-2024 13:04:13	Liber Armines	Transformer			

**User Activity Information** 



# **View Chromebooks**

View Chromebook will contain only the assets data from Chrome Console.

Click on *View Chromebooks* to load a report. Clicking on any of the column headers will provide options to search, sort, or group the data or hide the column.

	Chro	mebook Info			Q	=
Dashboards	۲	Added Time	<ul> <li>Modified Time</li> </ul>	* Serial Number	- Device ID	
Assets ~		13-Jun-2024 05:45:42	02-Jul-2024 02:25:31	5CD035G6B0	8e295912-c8et	-4fc9-8;
🛱 View Chromebooks	-	13-Jun-2024 05:45:42	02-Jul-2024 02:25:30	5CD040D75N	432a48a8-899	a-4264-{
Assets View						
📙 View Intune		13-Jun-2024 05:45:42	02-Jul-2024 02:25:30	5CD03002NV	49cd4586-0f8f	-40e6-8
Add Notes		13-Jun-2024 05:45:42	02-Jul-2024 02:25:30	5CD035G16P	6a54ee2d-223	0-4fbb-8
) Agent Information >		27-Jun-2024 14:27:43	02-Jul-2024 02:25:30	YX09C6WL	3244e9f2-aff1-	45e3-8a
Users >		13-Jun-2024 05:45:42	02-Jul-2024 02:25:30	5CD029K1R8	ab1ccd72-d6d7	'-4050-ε
J Logs						
) Fees >		13-Jun-2024 05:45:42	02-Jul-2024 02:25:30	SCD035G7FX	c395c8cd-a0t1	4e64-9
🛛 Rules		13-lun-2024 05-45-42	02-14-2024 02:25:20	5000/28/15	69587144.467	F. 4660-1
a Reports		13-3011-2024 03.43.42	02-301-2024 02.23.30	5000421015	07007140-407	1-4007-1

#### **View Chromebooks**

Click on the eye symbol to display a box to select the columns you want to display.

MS Leon Count	Chromebook Info			
Dashboards	Added Time	<ul> <li>Modified Time</li> </ul>	<ul> <li>Serial Number</li> </ul>	* Device ID
Assets ~	Show/Hide Columns	18-Jul-2024 02:59:51	5CD035G6B0	8e295912-c8ef-4fc9-8ad9-ffb35b9
Assets View	Added Time	18-Jul-2024 02:59:50	5CD035G7FX	c395c8cd-a0f1-4e64-90db-d96dbd
View Chromebooks	Modified Time			
🔒 View Intune	Serial Number	18-Jul-2024 02:59:50	YX099E3V	bf44927f-60ac-4dea-ad33-0c38a99
Add Notes	Device ID			
Agent Information	🛃 Model	18-Jul-2024 02:59:50	5CD029K1R8	ab1ccd72-d6d7-4050-8b38-fef2960
Users >	S Version	18-Jul-2024 02:59:50	YX09E4Y9	fd4475a6-67b1-4d33-96f6-e978a1
j Logs	Z Status	18-Jul-2024 02:59:50	5CD03002NV	49cd4586-0f8f-40e6-8ef1-cb624fcl
t Foos	RAM			
	🛃 Organizational Unit Path	18-Jul-2024 02:59:50	5CD035G16P	6a54ee2d-2230-4fbb-85a0-0cccf1b
Rules	Zast Sync	18-Jul-2024 02:59:50	YX09C6WL	3244e9f2-aff1-45e3-8a4f-d070b7b
J Reports >	Done	19-1-1-2024 02-50-50	5000001115	40607144 4476 4440 6940 600514

Selection Box to Choose Column Display



Click on **Show/Hide Columns** to toggle between select or deselect columns to display in this view. Click the box next to the columns to display and click **Done**.

To select all boxes again, click the eye and click **Show/Hide Columns.** Choose other columns to perform the desired view.

**Click** on a <u>line</u> record to view specific information about the asset. Note the **blue arrow** depicts a scroll bar to display more detailed information. Click the X when done.

Leon Count	_ 1	Chromebook Info		$\diamond$		×
		Added Time	Mo	Organizational Unit Path	/Chromebook/Elementary/1171	^
		13-Jun-2024 05:45:42	02-	Ethernet MAC Address		
		13-Jun-2024 05:45:42	02-	RAM	0 MB	
	_	13-lun-2024 05-45-42	02.	Dock MAC Address		
		20 7011 2021 03.13.12		Auto Expiration Date		
	_	13-Jun-2024 05:45:42	02-	Last Device Enroller Email		
	$\sim$	27-Jun-2024 14:27:43	02-	Last Sync	08-Aug-2023 17:13:44	
	2	13-Jun-2024 05:45:42	02-	Last Enrollment Time	05-May-2023 12:50:46	
	->-	13-Jun-2024 05:45:42	02-	TPM Version Info	family: 322e3000 specLevel: 74 manufacturer: 43524f53	
	5	13-Jun-2024 05:45:42	02-		tpmModel; 1 firmwareVersion: 3b81dc660cb1415b vendorSpecific: xCG fTPM	
and the second second	Д,	28-Jun-2024 02:24:44	02-	Last Known Network		

**Click on A Record to Display More Details** 

Click on the Menu options icon of (3 bars or Hamburger) in the upper right corner to access options to view the list. See the **red arrow** in the screenshot below. (Configure Reports/View)

				1	0	A
÷	Model	÷	OS Version 👻	Status	~	RAM
	Lenovo 100e Chromebook Gen 4			ACTIVE		0 MB
	Lenovo 100e Chromebook Gen 4		116.0.5845.210	ACTIVE		4 GB
	HP Chromebook 11A G6 EE/ HP Chromebook 11A G8 EE		114.0.5735.343	ACTIVE		4 GB

**Click on The Menu Icon for Viewing Options** 



Do not attempt to display data via these functions...Calendar, Timeline, Spreadsheet, or Kanban. **However**, Print and Export are available from this menu.

		Q	=
Version	Show as		-
4.0.5735.351	List		~
	Calendar		
4.0.5735.351	Timeline		
4.0.5735.35	Spreadsheet		
3.0.5359.17:	Kanban		
(	Print		•
4.0.5735.35	Export		
10 5945 210	ACTIVE		CP

More Options to Display Data- not supported for LCS

**Click** on the *Magnifier* icon in the upper right corner to display a list of all columns to perform a search. The Magnifier Icon displays the rest of the available *Search* options.

				All Bookmark
		_		Q ≡
	÷	OS Version -	Status	- RAM 🔺
			ACTIVE	0 MB
			ACTIVE	0 MB
omebook 11A G8 EE		114.0.5735.358	ACTIVE	4 GB
omebook 11A G8 EE		108.0.5359.172	ACTIVE	4 GB
omebook 11A G8 EE		114.0.5735.358	ACTIVE	4 GB
omebook 11A G8 EE		115.0.5790.182	ACTIVE	4 GB
omebook 11A G8 EE		114.0.5735.358	ACTIVE	4 GB
omebook 11A G8 EE		114.0.5735.358	ACTIVE	4 GB

### **More Search Options**



Below is an example of the available fields to use to search within **Serial Number** data. A box is presented to choose the criteria for the search (see **blue arrow** below).

Search - Chromebook Info	×
Added Time	
Modified Time	
Serial Number	
Contains -	
Is Empty	
Is Not Empty	
Starts With	
Ends With	- 1
Like	- II
Contains	- I
RAM	- 1
Organizational Unit Path	- I
Last Sync	

**Search Options List** 

### Note:

User Activity information is available from the View Chromebooks Menu. This data will provide device information useful for determining asset student usage and most recent logins.

	Chromebook Info								Q
Dashboards	zational Unit Path	- Last Sync	Last Enrollment Ti	User Activity	Time Activity	MAC Address	Boot M_	Annotated User	- Support End D
Assets 🗸	tebook/Elementary/0561	12-Sep-2024 08:25:31	02-Jul-2024 17:27:44	User Activity	Time Activity	A83876F5F69D	Verified	g.cc⊜leonschools.net	
Assets View	tebook/Elementary/1131	12-Sep-2024 10:32:43	24-May-2024 13:16:58	User Activity	Time Activity	5CBAEFAE6AA1	Verified	Eliana Gonzalez	
View Chromebooks	sebook/High/1141	12-Sep-2024 10:25:03	07-Jun-2024 16:00:14	User Activity	Time Activity	A83876F59EA7	Verified	enroll-udt@leonschools.net	

**Clicking** a line item displays a Printable View of the data.



#### **User Activity List**



### Add Notes

Click on *Add Notes* to search for an asset to add or review associated notes. Once a note is added, it will be recorded in the Assets View section. (see below)

MS Leon Count		Aug Notes				
Dashboards		Asset *	-Select-			
Assets	~	Notes *	123	٩		
📋 View Chromebooks			0 <u>123</u> 456789		_Sans ∨	10 ~
县 Assets View			5CD035C12	3	• = =	Ð
😫 View Intune			L3NXCV06E	408 <u>123</u>		
😰 Add Notes			L3NXCV06E	421 <u>123</u> 499 <u>123</u>		
) Agent Information	>		L3NXCV072	534 <u>123</u>	-	
Users	>					
J Logs						
) Fees	>					
Rules						
Reports	>		Subjects	Pocot		

### Add Notes

- 1. Click in the **Asset** box.
- 2. Type or scan in an asset serial number. In the example above, typing in "123" shows any assets with "123" in their serial number.
- 3. Choose an asset and begin typing any notes within the *Notes* text box.
- 4. Once complete, click the **Submit** button to save the notes with the associated asset serial number.
- 5. Click *Reset* to start over.



## **USERS**

Click on **Users** to show the two options: **Users** and **Add notes**. Keep in mind that notes added to the UDT Asset Tracking & Management System are considered public record.

8 I	Jsers	_	$\rightarrow$	~
	Users			
ô	Add Notes	6		



Click on Users to load the Manage Users screen.

		Mana	ge Users			Q, ≣	1
Dashboards			User ID -	Email	- First Name	-	-
Assets	>		107056099341468825404	adtest@leonschools.net	z		
Agent Information	->		112384928697696314659	171074692@edu.leonschools.net	F		
Users	~		103201492182894174549	171074691@edu.leonschools.net	E		
🗄 Users			109167580837704814815	171074697@edu.leonschools.net	t		
3 Add Notes			107243292764968968274	171074694@edu.leonschools.net	F		
Logs			101551218598763030904	171074695@edu.leonschools.net	5		
Fees	>		117236029444362872542	171074693@edu.leonschools.net	1		
Rules			115242988765995751529	171074684@edu.leonschools.net	F		
Reports	>		115477151708872854910	171074679@edu.leonschools.net	F		
Workflows	>		102258942555506369952	171074675@edu.leonschools.net	i i		
Settings	->						

#### Manage Users

This screen provides the same functionality described in the **View Chromebooks** section as it relates Eye, Search, Selecting Columns, Printing, Exporting. Click on single record to display user details, add Notes to the User or Print the User details report.



# Logs

The *Logs* menu option will display an audit trail of activity within the system.

	(	View	Asset Logs							$\rightarrow$	Q
Dashboards		10	Added Time -	Added User	Executed From	- Asset Serial Num	Asset Custom	Asset Type	Asset Model Number -	Asset Stat	Assign
Assets	2	4	17-Jul-2024 13:24:25	crutchfieldj@leanschools.net	One Inventory Audit	YX09C05D		Chromebook	Lenovo 100e Chromebook Gen 4	Operational	crutch
gent Information	×		17-Jul-2024 13:23:20	crutchfieldj@leanschools.net	One Inventory Audit	YX09C05D		Chromebook	Lenovo 100e Chromebook Gen 4	Operational	crutchi
ners Ners	* •		12-Jul-2024 12:02:46	Security dealers of a	One Inventory Audit	5CD022D51W		Chromebook	HP Chromebook 11A G6 EE/ HP Chromebook 11A G8 EE	Operational	urassi
5			12-Jul-2024 12:00:01	Statistical and the state	One Inventory Audit	ASSET01	Hot Pink-krb	Laptop	DELL 00001	Operational	urussi
les			12-Jul-2024 11:59:46	State of Local Division of the	One Inventory Audit	ASSET01	Hot Pink-krb	Laptop	DELL 00001	Operational	unassiį
ports orkflows	>		11-Jul-2024 15:48:31	territoria de la con	Create Asset Return	ASSET01	UDT testing tag	Laptop	DELL 00001	Operational	unassiį
					A 1 A A	reparation (		·			

### Logs Main Screen with Options

In the screenshot above, the colored arrows highlight the options within the Logs screen.

The orange arrow (View Asset Logs above) points to the *Eye* which will display a list of columns to include in the presented View. **Click Done** after making selections.



Eye – Select Columns to Display



### **UDT Asset Tracking & Management System**

The **blue** arrow (View Asset Logs – page 21) points to a Selection Box used to highlight each line record for inclusion and will display a Print and Export button for the selected records. Click to clear or check the records to include on a report or to export.



#### Logs Screen to Choose Records to Print or Export

Click on Export to view a list of the supported formats to export the data.

Print ~	Export	
• 🗆 A	d XLSX	Is
1	7- PDF	łc
1	7. HTML	le
	XML	
1	2- JSON	
1	2- CSV	or.
1	2- TSV	Ju

#### Logs Screen Export Options

The **green** arrow (View Asset Logs – page 21) points to a Small Triangle to display and select Sort options. Click on the small triangle to choose options to sort and/or group the data in that column. (see below)





### Sort And Group Columns

The **purple** arrow (View Asset Logs – page 22) points to the Search and Menu with more options described in the View Chromebooks section.

		All BOOKman
	(	Q =
Ψ.	Asset Stat	Assigned A
	Operational	crutchfiel
	Operational	crutchfield
book 11A G8	Operational	unassigne

### **Search Menu With More Options**

Make Selections for Searching and Printing data only.

1	Search - View Asset Logs			~ -
		Version	Show as	•
494	Executed From	1.0.5735.35	List	~
494	Contains 🔻	10 5705 05	Calendar	
3		1.0.5735.35	Timeline	
	Asset Serial Number	1.0.5735.35	Spreadsheet	
494	Asset Custom Tag	3.0.5359.17:	Kanban	_
494	Asset Type	1.0.5735.35	Print	
	2 C C C C C C C C C C C C C C C C C C C		Enport	

#### **Magnifier and Hamburger Search & Print Options**



# **UDT Asset Tracking & Management System**

Do not attempt to display data via these functions...Calendar, Timeline, Spreadsheet, or Kanban. **However**, printing and exporting may be done from this menu. Click on a line to display that record to View or Print or Scroll through the line Items.

Vie	w Asset Logs		$\diamond$	Print 3
	Added Time	Added	Inventory Check Date	11-Jul-2024
	11-Jul-2024 15:48:31	kborst@	Even and Even	Canado Assert Reducto
12	11.14.0004.15-10-00	(hourse)	Executed From	Looke Hole Heldin
	11-10-2024 13:13:30	NOAME	Asset Type	Laptop
	11-Jul-2024 15:11:34	kborsta	Unit Price	
	11-Jul-2024 15:11:34	kborst@	Asset Custom Tag	UDT testing tag
	11-Jul-2024 15:11:04	kborst@	Asset Type	
	11-Jul-2024 15:09:59	kborstill	User ID	
	03-Aul-2024 12:11:39	jandrew	Assigned User	unassigned@udtonline.com
	03-MI-2024 12-10:43	Jandrew	Assigned Group	
	03-Jul-2024 12:09:20	Jandrew	Added User	kborst@udtonline.com
	03-341-2024 12:07:29	jandrew	Inventoried From	Asset_Inventory_Check
			In contracted theme	kborst@adtooline.com

Scroll Through (double arrows), Print or View Single Line of Data



### **F**EES

Waiting on date for module and documentation for this section. In the meantime, fees are entered in Focus according to the Chromebook agreement. Fees <u>should</u> be entered after the district's service provider (UDT) confirms that the required repair is not due to manufacturer defect. We were hoping to automate the fee process with UDT through the ATMS platform. The company has not provided a date for completion of the fee assessment workflow.

In the meantime, you may follow the process that works best for your school with entering the fees and payments. We recognize that accessing/collecting fees in a timely manner is best practice. As the repair quotes arrive, we here at TIS will continue to review and update the student's Focus record.



**Fees Menu** 



### **REPORTS**

This section provides access to information based on data compiled from entries into the system. Additional reports will be available as customization continues for Leon County Schools.



Reports Menu

### **Asset Notes**

Asset Notes Report provide a list of note details entered via the Add Notes option under the Assets menu. The notes you enter in the textbox concerning the asset will appear in List view.

Lef Dashboards	Asset "	-Select							
Assets	~						-		
🛓 Assets View	Notes	В	I	<u>U</u>	Deja	VuSans	~	10 ~	<u>A</u>
📩 View Chromebooks		≡	Ξ	≣	Ξ	P	▦	ŧΞ	i≣
Add Notes									
å Users	· ·								
🖸 Logs	>								
Fees	>								
🛱 Rules									
📮 Reports	>								
		_		Decet					
💭 Workflows	2	Submit		PLATE ALL					

Add Asset Notes Display



### Lost and Stolen Assets

This report provides a list of devices recorded as Lost/Stolen.

### **Unassigned Users**

This report is a list of students who have not been assigned a device.

### **User Notes**

User Notes Report provide a list of note details entered via the Add Notes option under the Users menu. The notes you enter in the textbox concerning the asset will appear in List view.

Leon County Schools	Add Notes
🚊 Dashboards	User * -Select
≜ Assets >	
ဦ Users 🗸	Note <sup>™</sup> B <i>I</i> <u>U</u> DejaVuSans v 10 v <u>A</u>
置 Users	
ဂို Add Notes	
🖸 Logs >	
ஞ Fees →	
🔛 Rules	
🛱 Reports >	
🚆 Workflows >	
🚊 Settings 🛛 🕞 🖓	Submit Reset
📮 Repair Services 💦 >	

Add User Notes Display



# **Users with Assigned Assets**

The Users with Assigned Assets pulls information from Assets View and attaches to the User Report. Users assigned multiple devices will appear on the report twice.

lumber - H
lumber - H
Number 1

User List w/Multiple Devices



### WORKFLOWS

The Workflow menu option contains links to perform functions such as assigning, collecting and changing the status of devices. Information may be typed or scanned from barcodes. Some options may not be visible based on permissions.

Clicking on *Workflows* reveals the dropdown list of workflow options:

MS LEON COUNT	Assets Cycle Cou		
Reports	> Serial or Asset Tag		
Workflows	~		
+ Assets Cycle Count			
라 Create Asset Assignm	nent		
🕂 Create Asset Return		Submit Reset	
🕂 Create Bulk Asset Re	turn		
・ Create Group Assign	ient		
ቶ Recover Asset			
+ Report Lost/Stolen/1	No		
🕂 Status Update			
⊕ Update Asset Custor	n T		
Settings	5		



### **Create Asset Assignment**

- 1. Click on Create Asset Assignment to assign a device to a student.
- 2. Enter or scan the serial number or asset tag of a device to assign.
- 3. Enter or scan the student information. Focus student bar codes may also be used to scan student number. LCS district does not recommend assigning multiple devices to a student.
- 4. Select the student information from the drop-down list.
- 5. To search for a student, type the student's name or any portion of the student number. The screenshot below shows how to search for a User with 444444 in the name.
- 6. Once the correct Student has been selected, click **Submit** to assign the devices to them.



) Agent Information	>	Serial Numbers or Hostname *	5CD022D51W			
Users	>					
) Logs						
Fees	>	Users *	-Select-			
Rules			44444	٩		
☐ Reports	>		118269 <u>444444</u> 86	0153960 -		
Workflows	~		171060103@edu.	leonschools		
Assets Cycle Count						

### Create Asset Assignment – Search for User With "444444"

Users *	-Select-	•
Serial Numbers or Hostname *		
	Submit Reset	

### **Create Asset Assignment**



### **UDT Asset Tracking & Management System**

Create Asset Assignment

Agent Information

Users

Logs

Fees

Users \*

Rules

Rules

Workflows

Workflows

Create Asset Assignment

If the device is already assigned, a notification message will display.

Create Asset Assignment – Error When Already Assigned

If the User is already assigned a device, an additional notification message, including the current assigned asset details will appear. You may continue with assignment of additional devices, if applicable. If you enter the asset information without selecting a user, the screen will not advance.

Users 🗇	Jacquelyn Crutchfield - crutc × •		Current Assigned Assets	
		Asset Serial Number	Asset Model	Asset Location
Serial Numbers or Hostname 1		5CD040DP85	HP Chromebook 11A G6 EE/ HP Chromebook 11A G8 EE	Leon High
	Submit		_	
		0		
	* The selecte	d user currently has assigned as	sets t	

**Device Currently Assigned to User Message** 



# **Create Asset Return**

**Click** <u>Create Asset Return</u> when a single device is returned by a student. It tracks the return of the device along with any accessories.

Dashboards	Search *
🛓 Assets	> The "Search" field below can query a record using any of the following data:
① Agent Information	<ul> <li>Serial Number</li> <li>Hostname</li> </ul>
ဂ္ဂိ Users	Asset Tag     User ID
🗐 Logs	User Email
Fees	×
🗃 Rules	Submit Reset
📮 Reports	>
Workflows	× .
4 Assets Cycle Count	
🕂 Create Asset Assigni	nent
Create Asset Return	

#### **Create Asset Return**

1. Type/Scan the device serial number to Search the device in the database and click *Submit*. The Details screen appear.

Dashboards	Serial Number or H	lostname ASSI	ETO1					
Assets	User	olar	na@udtor	line.cor	n × ~			
Agent Information	20							
Users	Full Name	Orla	ndo Lama					
Logs	Missing Accessorie	s						
Fees	Notes	Hea	Headset Power Cable					
Rules	10000	Pow			5ans	4	10 ~	
Reports		<u>_</u>		Ē	≡	≣	Ξ	Ð
Warkflows		E	8 1≣	iΞ				
Settings	•							

#### **Create Asset Return Details**



- 2. Enter notes, if applicable. (Device condition, power cord, etc.)
- Scroll down and click the *Submit* button. When Submit is clicked, a message flashes on the screen "Asset Returned Successfully!" and reloads the Create Asset Return screen for any other returned devices.

### **Create Bulk Asset Return**

**Click** <u>Create Bulk Asset Return</u> to return multiple devices from students. It tracks the return of the devices along with any accessories. This is useful when many devices need to be scanned back into the database as being returned.

MS Leon Count	Create Bulk Asset Return		
Reports	Serial Numbers or Hostname *		
Workflows			
1 Assets Cycle Count			
Create Asset Assignment		_	
Create Asset Return		Submit	Reset
Create Bulk Asset Return			
Create Group Assignment			
Recover Asset			
Report Lost/Stolen/No			
Status Update			
B Update Asset Custom T			

#### Create Bulk Asset Return

Enter the serial numbers or scan barcodes of the returned devices and click **Submit**. The workflow is the same as the single device return.

### **Recover Asset**

Click **Recover Asset** to update a device previously recorded as lost, stolen, or destroyed has been recovered. This allows the device to be added into the inventory of available devices once it has been checked and updated. Please verify your school has possession of a device when recovering devices.



Leon Count	R	ecover	Asset						
Reports	> 5	iearch							
Workflows	<b>e</b> 13	The "Sear	rch" field abo	ove can	query a re	ecord usi	ing any c	f the follo	wing da
Assets Cycle Co	unt	• Ser	stname						
🜵 Create Asset Ass	lignment	<ul> <li>Ass</li> <li>Use</li> <li>Use</li> </ul>	set Tag er ID er Email						
Oreate Asset Ret	turn								
🔶 Create Bulk Asse	et Return								
🗇 Create Group As	sigment				Decet				
Recover Asset			3001		Neset				
Report Lost/Stol	en/No								
💠 Status Update									
Update Asset Cu	stom T								
3 Settings	,								

**Recover Asset Main Screen** 

- 1. Enter a serial number and
- 2. Click <u>Submit</u> to search. If the device is not lost, stolen or operational, an error will display. If the device is lost, stolen or not within the inventory, it will display the following screen.

Leon Count	Asset Recover - Details	
Dashboards	Assigned User Name: Assigned User ID: unassigned Assigned User Location:	
Assets	> Device Assigned to User	
Agent Information	> Assets to Perguer	
Users	Model: HP Chromebook 11A G6 EE/ HP Chromebook 11A G	3 EE
Logs		
Fees	Submit Reset	
Rules		
Reports	> -	
Workflows	>	
Settings	2	

#### Asset Details Screen

- 3. Verify the correct model
- 4. Click the box to mark the device Asset to Recover
- 5. Click *Submit*. This will add the device back into inventory.

Recover



### **Report Lost/Stolen/Not Returned**

Click <u>Report Lost/Stolen/Not Returned</u> to record a device as lost or stolen, the opposite of Recover Asset.

TUDT Leon Count	Report Lost/Stolen/Not Returned
🛱 Reports >	Search
<ul> <li>₩orkflows ✓</li> <li>Assets Cycle Count</li> <li>Create Asset Assignment</li> <li>Create Asset Return</li> <li>Create Bulk Asset Return</li> </ul>	<ul> <li>The "Search" field is used to query a record using any of the following data:</li> <li>Serial Number</li> <li>Hostname</li> <li>Asset Tag</li> <li>User ID</li> <li>User Email</li> </ul>
<ul> <li>✤ Create Group Assigment</li> <li>♣ Recover Asset</li> </ul>	Submit Reset
<ul> <li>♣ Report Lost/Stolen/No</li> <li>♣ Status Update</li> <li>♣ Update Asset Custom T</li> </ul>	
Sottings	

#### Report Lost/Stolen/Not Returned Items

- 1. Enter the serial number in the box and click *Submit*. The following screen will display with the device information.
- 2. Select device, accessory or both.
- 3. Add any optional notes in the *Notes* box.
- 4. Click Submit to report the item status.

### Notes:

- For now, please send the numbers to <u>helpdesk@leonschools.net</u> so that the device may be deactivated. UDT has not customized this feature as of date.
- LCS will not enter serial numbers for power cords. However, you may provide details in the notes section, where applicable.



Dashboards	Unassigned devices	won't have an Owed Fee.		
Assets	> Asset Serial	ASSET01		
Agent Information	> Asset Model	DELL 00001		
Users	>	brank VVVA		
Logs	Location	Testing Location (UDT)		
Fees	> Lost/Stolen Item	-Select-		
Rules	Notes	Device Accessory Device And Accessories		
Reports	>			
Workflows	>			
Settings	>			
		Submit Reset		

Lost/Stolen/Not Returned Entry



# **REPAIR SERVICES**

The warranty support team will respond to requests entered in the module. The team will update the ticket stage and status after the ticket is received. An email confirmation will be received when you create the ticket. Note: Only Lenovo devices should be entered in the ATMS Repair Services Module.

Click the Repair Services Down Arrow to view options.



**Repair Services Options** 

### **Create Repair Ticket Request**

- 1. Click Create Repair Ticket Request.
- 2. Type/Scan in an Asset Serial Number.



#### **Repair Ticket Request**

3. Click **Next** to retrieve the Asset information.

Note: The pick-up location and contact information will populate based on user details.



Reason for Service Request "	Broken Screen - Test
Pickup Location *	Swift Creek Middle 🗙 🔹
Contact Information	
Email *	crutchfieldj@leonschools.net
Name *	Jacquelyn Crutchfield
Phone Number *	+1 - 850-487-7537
	Create Reset

#### **Repair Ticket Information**

- 4. Enter the Service Request details. Please provide information related to the device; specifics about the malfunctioning components and/or system issues with the device. This is a required field.
- 5. Location information should populate for your school. You may edit if needed.
- 6. Click the *Create* button to save the details with the associated asset serial number.
- 7. Click *Reset* to start over and or cancel the details for this item.

### **Assets View Page – Ticket Creation**

The option to create a ticket is also available from the <u>Assets View Report</u>. Selecting from the Assets View selection or the Three Dots Menu will advance to the Create Repair Service Ticket Workflow (shown above) for the entry of service request details.

Asse	ets View 👒							
	Asset Serial Number	- Hostname	- Asset Type	<ul> <li>Asset Model Number</li> </ul>	<ul> <li>Asset Custom Tag</li> </ul>	- Asset Status	- Action	Asset Location
	YX09A4F2		Chromebook	Lenovo 100e Chromebook Gen 4		Operational	Create Service Ticket	Chiles High - 114

#### Assets View Report – Ticket Creation Option





Assets View Single Line Menu (Three Dots)

After creating the ticket, the <u>Ticket Created Confirmation</u> will appear, along with an assigned <u>Ticket</u> <u>Identification Number</u> in the View Repair Service Ticket Request Table.

-				$\rightarrow$	Ticket created. Ticket ID: 16			
r								
View	v Renair Servic	e Ticket R	munocte					
( icr	n nepair servic	C HENCE IN	equeses					Q +
					- UDT David Ticket Marker	Struktur .	Acciment licer	· Pickup Loca
	Ticke Cr	reated On -	Asset Serial Number	<ul> <li>Asset lag – Asset Model Number</li> </ul>	- UDT Repair Ticket Number - St	surrus .	Panghina onei	
•	Ticke Cr 16 20	reated On * 0-Aug-2024	Asset Serial Number YX09BHJD	Asset Iag - Asset Model Number Lenovo 100e Chromebook Gen 4	Net Not Net Number	New	unassigned@udtonline.com	Swift Creek

### **Confirmation Email**

You will receive a confirmation email with ticket details. This also provides a message to the UDT warranty that a repair request has been initiated. Information will include all details provided when creating the request. There is a link provided that will re-direct to the ATMS platform.





### **View Repair Service Ticket Requests**



This table will be updated as tickets are created and contains the serial and model number, UDT Repair Ticket Number, Assigned User, Location, Warranty Information, etc.

### View Repair Services Ticket Logs



The <u>Service Ticket Logs Table</u> will contain all details available to validate the status of each ticket. All transactions related to include creation date, submissions, updates, etc. until the ticket is closed. The <u>View</u> <u>Assets Log</u> will also update the status of each asset as it moves from Operational to Repair status.

4	View	Asset Logs							Q
us.	•	Added Time	Added User "	Executed From **	Asset Serial Num * Asset Cu	stom * Asset Type *	Asset Model Number	<ul> <li>Asset Sta</li> </ul>	Assigned User
*		21-Aug-2024 07:30:24	bellavancea@leonschools.net	Create Asset Assignment	YX09CGGM	Chromebook	Lenovo 100e Chromebook Gen 4	> Operational	171056564@edu.leor t
		21-Aug-2024 07:26:03	bellavancea@leonschools.net	Create Asset Assignment	YXD9CG4Q	Chromebook	Lenovo 100e Chromebook Gen 4	Operational	171065719@edu.leor t
		21-Aug-2024 06:54:42	christiew@leonschools.net	Create Asset Return	YXD9A4F2	Chromebook	Lenovo 100e Chromebook Gen 4	Operational	unassigned@udtonlin

**Repair Ticket Log** 



# **UDT Asset Tracking & Management System**

**Click** anywhere on a line to display a quick overview of that record. Users may go to the previous < or the next > record, *Print* the record, or view individual ticket information.

liew F	Repair Ser	vice Ticket Re	quests				
	Ticke_ *	Created On -	Asset Serial Number Asset Tag	Asset Model Number	Reason for Request	Broken Screen - Test	
	17	20-Aug-2024	5CD0300418	Chromebook 11 G8 EE	Pickup Location	Swift Creek Middle	
					Name	Jacquelyn Crutchfield	
					Phone Number	<b>C</b> +18504877537	
					Email	crutchheldji@leonschools.net	
				UDT Repair Ticket Number			
					Submitted By	crutchfieldj@leonschools.net	
					RPS Ticket ID		
					Asset Entry	YX09BHJD	
	16	20-Aug-2024	YX096HUD	Lenovo 100e Chromebook Gen 4	Asset Serial Number or Asset Tag	YX09BHUD	
	15	20-Aug-2024	5CD030042V	Chromebook 11 G8 EE	Asset Model Number	Lenovo 100e Chromebook Gen 4	
	14	20-Aug-2024	SCD022D4VN	HP Chromobook 11A G6 EE/ HP Chromobook 11A G8 EE	Date Closed		
	13	20-Aug-2024	YX099K66	Lenovo 100e Chromebook Gen 4	Repair Status	New	
	11	16-Aug-2024	5CD0300425	Chromebook 11 G8 EE			
	12	16-Aug-2024	5CD0300425	Chromebook 11 G8 EE	Asset Location	Swift Creek Middle	
	10	16-Aug-2024	5CD030042/	Chromebook 11 G8 EE	Last Updated		
	9	16-Aug-2024	JANRCX000249419	TUF GAMING FX504GE_FX80G	Renair States		
	8	15-Aug-2024	5CD030040N	Chromebook 11 G8 EE	Status	New	

**Individual Line Details View** 

# **UDT WARRANTY TEAM CONTACT INFORMATION**

Jonathan Milnes (850) 559-9593