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Description automatically generated*

***Oklahoma Chrisian University***

*Asset Management System*

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## **Asset Management**

### Serialized Assets

**View All Assets**

1. From the navigation bar, select **Manage** and then click on **Assets**.
2. Choose the **Active** and **Assets** tabs.
3. View all active assets in the **Active Assets** table.

**View Specific Asset**

1. From the navigation bar, select **Manage** and then click on **Assets**.
2. Choose the **Active** and **Assets** tabs.
3. Use filters by category, type, or profile to locate a specific asset.

**View Asset Details**

1. From the navigation bar, select **Manage** and then click on **Assets**.
2. Choose the **Active** and **Assets** tabs.
3. Filter by category, type, or profile to find the specific asset.
4. Click the **View Asset Details** icon for the selected asset.
5. View details including asset information, assignments, maintenance, warranties, and leasing.

**Edit Asset**

1. From the navigation bar, select **Manage** and then click on **Assets**.
2. Choose the **Active** and **Assets** tabs.
3. Filter by category, type, or profile to find the specific asset.
4. Click the **Edit** icon for the selected asset.
5. Make changes and click **Save** in the lower right corner.

**Archive Asset**

1. From the navigation bar, select **Manage** and then click on **Assets**.
2. Choose the **Active** and **Assets** tabs.
3. Filter by category, type, or profile to find the specific asset.
4. Click the **Archive** icon for the selected asset.

**Delete Asset**

1. From the navigation bar, select **Manage** and then click on **Assets**.
2. Choose the **Active** and **Assets** tabs.
3. Filter by category, type, or profile to locate a specific asset.
4. Click the **Archive** icon for the asset (to ensure it’s not immediately removed from the system).
5. Navigate to the **Archived** tab.
6. Search for and find the recently archived asset.
7. Click the **Delete** icon for the asset and confirm deletion.

**Add New Asset**

* From the navigation bar, select **Manage** and then click on **Assets**.
* Choose the **Active** and **Assets** tabs.
* Select the **Add New Asset** button in the upper right corner of the acrive asset table
* Complete the fields and click **Save** in the lower right corner.

### Profiles

**View Active Profiles**

1. From the navigation bar, select **Manage** and then click on **Assets**.
2. Click the **Active** and **Profiles** tabs near the top of the page.
3. View active profiles in the table. To sort for a specific profile, use the **Filter by Type** and **Filter by Category** filters above the table.

**View Profile**

1. From the navigation bar, select **Manage** and then click on **Assets**.
2. Click the **Active** and **Profiles** tabs above the active profiles table.
3. Select the **View Profile** icon for the specified profile to view profile information and serialized assets for that profile.

**Edit Profile**

1. From the navigation bar, select **Manage** and then click on **Assets**.
2. Click the **Active** and **Profiles** tabs above the active profiles table.
3. Filter to find the specified profile and click the **Edit** icon for the profile.
4. Enter any changes into the profile fields and click **Save** to confirm changes.

**Archive Profile**

1. From the navigation bar, select **Manage** and then click on **Assets**.
2. Click the **Active** and **Profiles** tabs above the table.
3. Filter to find the specified profile and click the **Archive** icon for the corresponding profile. The profile will then appear under the **Archived** tab.

**Delete Profile**

1. From the navigation bar, select **Manage** and then click on **Assets**.
2. Click the **Archived** and **Profiles** tabs above the table.
3. Filter to find the specific profile.
4. Select the **Delete** button for the corresponding profile and confirm the deletion

### Types

**View All Types/Filter Type**

1. Select **Assets** from the **Manage** dropdown on the navigation bar.
2. Click the **Active** and **Types** tabs near the top of the page.
3. Active types are displayed on a table below. To filter the types displayed, use the search bar above the table to filter by category.

**Edit Type**

1. Select **Assets** from the **Manage** dropdown on the navigation bar.
2. Click the **Active** and **Types** tabs near the top of the page.
3. Filter and select the specific type on the table.
4. Click the **Edit** icon corresponding to the type.
5. Make changes to the type information and select **Save** to confirm changes.

**Archive Type**

1. Select **Assets** from the **Manage** dropdown on the navigation bar.
2. Click the **Active** and **Types** tabs at the top of the page.
3. Filter and find the specific type to be archived on the table.
4. Click the **Archive** button for the corresponding type. The type is now removed from the active table and appears on the table on the archived types page.

**Delete Type**

1. Select the **Archived** and **Types** tabs.
2. Select the type to delete.
3. Click on the corresponding **Delete** icon.
4. Confirm deletion.

## Check-In

**Check In Asset**

1. Select **Check-Out/In** from the **'Recent Activity'** table on your user dashboard or from the navigation bar.
2. Choose between **People, Rooms, or Buildings**, depending on the category to which the asset was assigned, and click on the corresponding tab.
3. Click on **Check-In** at the top of the table.
4. Click on **Check-In** in the upper right corner of the **'Recent Check-Ins'** table.
5. Search for the asset by the entity it was assigned to, the asset name, or the serial number.
6. Click on **Check-In** in the lower right corner to confirm the check-in.

## Check-Out

**Check Out**

1. Access the **Check-Out/In** feature either from the 'Recent Activity' table on your user dashboard or via the navigation bar.
2. Select the category of the asset — People, Rooms, or Buildings — based on what the asset was assigned to.
3. Click on **Check-Out** located on the tab above the table.
4. In the 'Recent Check-Out' table, click on **Check-In** in the upper right corner.
5. Choose the entity the asset will be checked out to, and select the asset.
6. If there is no expected check-in date, ensure the **Indefinite Checkout** box remains checked. If an expected check-in date exists, uncheck the box and set the date using the date selector.
7. Confirm the checkout by clicking on **Check-Out** in the lower right corner.

## Dashboards

**Accessing Dashboards**

1. Click the OC logo in the upper right corner to access the dashboard.

## Warranties

**View All Warranties**

1. Select **Warranties** from under **Services** on the navigation bar.
2. Active warranties will be displayed on the table. To search for a warranty by serialized asset, use the search bar near the top of the page.

**Add New Warranties**

1. Select **Warranties** from under **Services** on the navigation bar.
2. Click **Add Warranty** in the upper right corner of the active warranties table.
3. Enter the warranty information and click **Save** in the lower right corner of the add warranty box.

**Edit Warranties**

1. Select **Warranties** from under **Services** on the navigation bar.
2. Active warranties are displayed on the table. To search for a warranty by serialized asset, use the search bar near the top of the page.
3. Click the **Edit** icon for a serialized asset.
4. Make changes to the warranty information and save the updates.

**Archive Warranties**

1. Select **Warranties** from under **Services** on the navigation bar.
2. Search by serialized asset to find a specific warranty.
3. Select the **Archive** option for the relevant warranty.

**Delete Warranties**

1. Select **Warranties** from under **Services** on the navigation bar.
2. Ensure that the warranty to be deleted has been archived.
3. Select the **Archived** tab.
4. Search for the specific warranty.
5. Click the **Delete** icon that corresponds to the warranty and confirm the deletion.

## Leasing

**View All Leases**

1. Select **Leasing** from under **Services** on the navigation bar.
2. Active leases will be displayed on the table. To search for a lease by serialized asset, use the search bar near the top of the page.

**Add New Leases**

1. Select **Leasing** from under **Services** on the navigation bar.
2. Click **Add Lease** in the upper right corner of the active leases table.
3. Enter the lease information and click **Save** in the lower right corner of the add lease box.

**Edit Leases**

1. Select **Leasing** from under **Services** on the navigation bar.
2. Active leases are displayed on the table. To search for a lease by serialized asset, use the search bar near the top of the page.
3. Click the **Edit** icon for a serialized asset.
4. Make changes to the lease information and save the updates.

**Archive Leases**

1. Select **Leasing** from under **Services** on the navigation bar.
2. Search by serialized asset to find a specific lease.
3. Select the **Archive** option for the relevant lease.

**Delete Leases**

1. Select **Leasing** from under **Services** on the navigation bar.
2. Ensure that the lease to be deleted has been archived.
3. Select the **Archived** tab.
4. Search for the specific lease.
5. Click the **Delete** icon that corresponds to the lease and confirm the deletion.

## Reports

**Generate New Report (by Type) – Save and Export**

1. Select **Reports** from the navigation bar.
2. Click the **Type** tab near the top of the page.
3. Select **Generate New Report** on the upper right of the report history table.
4. Fill out the report specifications. You have options to filter by accusation, disposal, or both, under the asset type.
5. After selecting the asset type and filling in the relevant report information, click **Generate Report** at the upper right corner of the type report results table.
6. The report will successfully populate on this table.
7. To save this report for quick access when using the application, select the blue **Save** icon.
8. To download a CSV file of the report, select the **Download** icon next to generate report.

**Generate New Report (by Assignment) – Save and Export**

1. Select **Reports** from the navigation bar.
2. Click the **Assignment** tab near the top of the page.
3. Select **Generate New Report** on the upper right of the report history table.
4. Fill out the report specifications. You have options to filter by **Check-In** or **Check-Out** under the assignment type.
5. After selecting the assignment type and filling in the relevant report information, click **Generate Report** at the upper right corner of the assignment report results table.
6. The report will successfully populate on this table.
7. To save this report for quick access when using the application, select the blue **Save** icon.
8. To download a CSV file of the report, select the **Download** icon next to the generate report button.

## Person Management

**View Person**

1. Select **People** from the **Manage** dropdown on the navigation bar.
2. Click the **Active** and **People** tabs.
3. View active people from the **Active People** table. Use the search bar to filter by name.

**View Person Details and Person Checkout History**

1. Select **People** from the **Manage** dropdown on the navigation bar.
2. Click the **Active** and **People** tabs.
3. View active people from the **Active People** table. Use the search bar to filter by name.

**Edit Person Details**

1. Select **People** from the **Manage** dropdown on the navigation bar.
2. Click the **Active** and **People** tabs.
3. View active people from the **Active People** table. Use the search bar to filter by name.
4. Select the **Edit** icon for the specified person.
5. Edit person information and click **Save** to confirm changes.

## Facility Management

### Rooms

**View Active Rooms**

1. From the navigation bar, select **Manage**, then choose **Facilities**.
2. Select the **Rooms** and **Active** tabs on the page.
3. Use the **Filter by Building** dropdown to select the building's rooms you wish to view.

**View Asset History for a Room**

1. From the navigation bar, select **Manage**, then choose **Facilities**.
2. Select the **Rooms** and **Active** tabs on the page
3. Select the buildings rooms you want to view using the filter by building drop down
4. From the filtered rooms, select view room details for the corresponding room
5. View current assets assigned to the room from the current table, and past assets assigned in the past tab

**View Asset/Room History for a Building**

1. From the navigation bar, select **Manage**, then choose **Facilities**.
2. Select the building and active tabs on the page
3. Search for the buildings you want to view using the filter by building name/abbreviation drop down
4. Select view building for the corresponding building
5. View current rooms and asset assignments by selecting the corresponding tab

**Add New Room**

1. From the navigation bar, select **Manage**, then choose **Facilities**.
2. Select the **Buildings** and **Active** tabs on the page
3. In the Active Buildings table, click **View Building** icon for the corresponding building.
4. In the top right corner of the building details, click **Add New Room to [Building Name]**.
5. Enter the necessary room information and click **Save** to create the room.

### Buildings

**View Room and Asset History for a Building**

1. From the navigation bar, select **Manage**, then choose **Facilities**.
2. Select the **Building** and **Active** tabs on the page.
3. Select the buildings you want to view using the filter by building drop down and click the **View Building** icon.
4. View Building Rooms, Building Assets, and Add New Rooms through the Building View Page

**Add New Room**

1. From the navigation bar, select **Manage**, then choose **Facilities**.
2. Select the **Buildings** and **Active** tabs on the page
3. In the Active Buildings table, click **View Building** icon for the corresponding building.
4. In the top right corner of the building details, click **Add New Room to [Building Name]**.
5. Enter the necessary room information and click **Save** to create the room.

## Maintenance

**Search Maintenance for a Serialized Asset**

1. Navigate to the **Services** menu on the navigation bar and select **Maintenance**.
2. At the top of the page, use the search bar to enter the serialized asset name or ID number. This filters the maintenance history table according to your input.

**Record Maintenance**

1. Select **Maintenance** from the **Services** menu on the navigation bar.
2. In the top right corner of the maintenance history table, click **Record Maintenance**.
3. Enter the details in the Maintenance log form.
4. To save the log, click **Save** located at the bottom right corner of the form.

**Delete Maintenance**

1. Select **Maintenance** from the **Services** menu on the navigation bar.
2. To find the specific maintenance log, enter the serialized asset name or ID number in the search bar at the top of the page.
3. Locate the maintenance log you wish to delete and click the trash icon next to it.
4. Confirm the deletion to remove the maintenance log.

**Edit Maintenance**

1. Select **Maintenance** from the **Services** menu on the navigation bar.
2. Use the search bar at the top of the page to filter the maintenance history by entering the serialized asset name or ID number.
3. Choose the maintenance log you want to edit by clicking on it.
4. Make the necessary changes to the maintenance log information.
5. Click Save in the bottom right corner to update the log.

## User Management

**View Active Users**

1. Select **Users** from the **Manage** menu on the navigation bar.
2. In the displayed table, view the list of active users.
3. Use the search bar to filter the list by entering a user's name.

**Change an Individual User's Role Assignment**

1. Select **Users** from the **Manage** menu on the navigation bar.
2. Use the search bar to locate a specific user.
3. Next to the user’s name, select the new role from the dropdown menu.
4. To apply the change, click Save All Changes at the top right corner of the table.

**View User Roles**

1. Select **Users** from the **Manage** menu on the navigation bar.
2. Click on the **User Roles** tab.
3. View all user roles listed in the table.

**Add User Role**

1. Access **Users** from the **Manage** section on the navigation bar.
2. Click on the **User Roles** tab.
3. At the top right of the table, click **Add New Role**.
4. Enter the new role’s name, define the categories of assets the role can view and interact with, and set the specific action permissions.
5. Click **Save** to confirm and create the new role.

**Edit User Role**

1. Under **Manage** on the navigation bar, select **Users** and navigate to the **User Roles** tab.
2. In the table, click the edit icon corresponding to the role you want to modify.
3. Edit the role’s name, the categories of assets the role can access, and specify the action permissions.
4. Click **Save** to confirm the changes.

**Delete User Role**

1. From the **Manage** menu on the navigation bar, select **Users** and go to the **User Roles** tab.
2. In the table, find the role you wish to delete and click the delete icon next to that role.
3. Confirm the deletion to remove the role.

## **System Terminology**

* **Asset Category**
  + Broad classification (e.g., Device, Handheld)
* **Asset Type**
  + Specific category (e.g., Phone)
* **Asset Profile**
  + Make and model details (e.g., iPhone 14)
* **Serialized Asset**
  + Unique identifier (e.g., Serial Number)
* **Checkout**
  + Assigning an asset to a person, room, or building
    - Ex: Assigning a laptop to a professor or student.
    - Ex: Assigning an HVAC system to the PEC
    - Ex: Assigning a Projector to PEC 229
* **Check-in**
  + Returning a checked-out asset
* **User**
  + A person who actively uses the system (ex: worker, manager, admin)
* **User Role**
  + The designated authority assigned to a user within the system.
  + Each Role can have different levels of access across the system, and these permissions can be edited under **User Management**
    - Example: Administrator, Manager, Worker.