CI Custom GAB Training Project

IT Asset Management

Introduction

This project is an example GAB project like one the CI team would work on from a customer. Like a real project, the request/need is coming from the customer, and it is up to the developer to design and implement the project. This should cover the basics of several different CI/GAB practices. As a real project, this would be quoted at about 50 hours, and it is expected to take a new developer 4-6 weeks.

In a CI project, when there are questions about the requirements/implementations, they should be discussed with the customer. For the purposes of this project, the CI Team Lead and Senior developers will work as the customer.

This project will be broken up into phases. At the beginning of each phase, the developer should go over the requirements, design a solution, and propose it to the customer. The customer will give feedback and validate the solution, after which the developer can continue building the project. Once a phase is complete, the phase should be delivered to the customer and validated with them. Any feedback should be addressed before moving on to the next phase.

The developer is encouraged to use all resources available to them (GAB Help, GSS Help, teammates, the Senior Developers and Team Lead, the existing GSS codebase, etc.) to their advantage when working on this project. If stuck, do not spend too long on a single issue. The rest of the team is always available to point them in the right direction.

For each piece of this project, the menus/reports/code should be presentable and match GSS standards.

Premise

This customer needs the ability to better track and manage IT assets in GSS. They would like to use the GSS inventory system functionality as a base and build on top of that to accomplish their needs.

- IT Asset Parts will be stored in the GSS Inventory system with the Product Line **IT**
- The sort code field will store the IT Asset Type: HDWR for hardware and SFWR for software
- The Make will be stored in the Inventory 1 field
- The Model will be stored in the Inventory 2 field
- The warranty in days for the part will be stored in a new custom field
- For each individual IT asset part in inventory, a unique IT Asset ID custom field will need to be stored
- For each individual IT asset part in inventory, the date received will need to be stored in a new custom field
- For each individual IT asset part in inventory, the serial number will need to be stored in a new custom field
- For each individual software IT Asset Part in inventory, the product key will be stored in a new custom field

- Users will be prompted to enter IT asset part information when receiving them in Purchasing > Transactions > P.O. Receipts, or can enter the information on the inventory master
- IT Asset Parts will need to be able to be assigned/Unassigned to specific employees
- Employees will need to be able to enter service tickets against IT Asset parts
- IT Members will need to be able to update and close service tickets
- Assignment and ticket history needs to be stored
- An IT Asset Management menu where IT Members can view all IT Asset Information, update assignment, and update tickets will be built
- An IT Asset overview report needs to be built
- An IT Asset export needs to be built

Phase 1 – Inventory

On the Inventory > File > Inventory Parts > Open screen, a custom field will be added for Warranty. This should save and load properly when a part is selected/saved/deleted. Another field will be added to this screen to show how many of the part are currently assigned to employees. The script one button will be renamed to "IT Assets" and will launch a menu where the user can see all the unique IT Asset IDs for this part and the information about them. The menu should show if they are assigned or not, who they are assigned to, and if there are any open service tickets for them. The serial number and product key should be editable on this screen. Any missing fields should be highlighted and editable.

When receiving parts in Purchasing > Transactions > P.O. Receipts, if there are IT Asset parts on the receipt, the user will be prompted to enter the serial number, and product key. The date received and IT Asset ID will be stored automatically.

Phase 2 – Assignment

In the Payroll > File > Employees > Open screen, the script one button will be renamed "IT Assets" and will open a menu showing all IT Asset parts currently assigned to the selected employee. In this menu, the user should be able to unassign parts, as well as assign new ones. When assigning/unassigning a part, the user should be able to enter notes. The assignment history, including the user, part, IT Asset ID, date assigned/unassigned, and notes should be stored into a custom database table. In a second tab, the assignment history should be visible.

Phase 3 – Ticket Entry

A new custom menu item should be created at Inventory > Transactions > IT Ticket Entry. In this menu item, the user should be able to see their currently assigned parts and enter in service tickets against them for issues with IT Asset Parts. The user should be able to select an issue type (Setup, Repair, Replace, Training) and enter in ticket notes. The ticket should be given a unique ticket ID and saved to a custom database table. The table should store the relevant information (employee, date/time, part, IT Asset ID, Issue type, notes) as well as if the part is currently under warranty or not. In another tab, the user should be able to see their currently open tickets and their status. In a final tab, the user should be able to see their previously closed tickets.

Phase 4 – IT Asset Management Menu

A new custom menu item should be created at Inventory > Administration > IT Asset Management. This menu item should only be available to employees in the IT department. From here they should be able to:

- View all current IT Asset parts and their associated information
- View all current assignments, and assign/unassign parts from this menu
- View assignment history
- View all currently open tickets
- Update the status on open tickets (New, In Process, Waiting For Information, Part Ordered), add IT notes to open tickets, and close them
- View IT ticket history
- Open the Inventory Master for a selected part
- Open inventory history for a selected part
- Quickly enter new purchase orders for IT Asset Parts

Phase 5 – Reports / Exports

From the Inventory > Administration > IT Asset Management menu they should also be able to print an IT Asset Overview report, which lists all current IT Asset Parts, all relevant information, and their current assignment status. This report will be used for inventory validation.

Lastly, from this menu, they need to be able to export all current IT Asset Parts and their relevant information to a CSV file. This file will be used to import the data into a separate IT management software. The required fields **are PART, TYPE, MAKE, MODEL, SERIAL, WARRANTY, PRODUCT KEY, DATE RECEIVED, ID, SERIAL NUMBER, and CURRENT OWNER**. They should be able to select the file export location and name.

Conclusion

Once the project is finalized and validated with the customer, it will need to be thoroughly documented for future reference. Once this is complete, the project is complete.