

**Remote Distro App**

SU Asset Track Module

Version: 1.0

Created: December 2020

Last Updated: December 10, 2020

## Introduction

Remote Distro is a new module in the SU Asset Track web app developed by Clutch. This module is used to process iMLearning Program Agreements electronically. While its primary purpose is for processing agreements for remote students that received their devices through direct shipment to their location, it can also be used with devices that are picked up locally on the SU campus. That said, it is not a replacement for our “in person” distribution process app.

**URL:** <https://ipe.su.edu/SUAsset/RemoteDistro.aspx>

**Authentication:** SUnet credentials; member of “IC Mac Distribution” AD Group



The process begins by uploading an Excel template that is populated with the appropriate asset numbers and models, student information, and purchasing information. Before the data is added to Web Help Desk, the app verifies all necessary asset models exist in WHD. The assets get created in WHD, assigned to the student, an electronic version of iMLearning lease agreement gets created, and email is sent to the student requesting signature.

**Models cannot be created by the Distro App using the WHD API and must be created in WHD prior to using the app to create the asset and assign it to the student.**

**Pre-Run Checklist**

* Make sure the correct term is set in the Admin section of the Asset Track app. (Add screen shot)
* Verify the asset Models you are uploading already exist in Web Help Desk (the app cannot create Models in WHD due to a limitation in the API)
* Create a copy of the upload template file
* Do not rename any of the columns or change their arrangement in the template file

## Adding Students and Assets into the Distro App

**Enter student and asset information into the template file**

*IMPORTANT: See the “Template Data Reference” table in the Appendix for information on how to fill out the template.*

Template file location: Google Drive > Shared drives > Institutional Computing > iMLearning > \*Policies & Procedures > Remote Distro App

File name: Template - SU Fall 20 Batch 33 Distro App Upload File\_20201203

*NOTE: The template includes sample student data, be sure to remove the sample data before adding your new data.*

After entering your data, triple check the file for accuracy and save it in the correct folder in the iMLearning folder in Shared drives.

Save the new file to: Google Drive > Shared drives > Institutional Computing > iMLearning > Year > Distro App Upload Files

Naming convention to be used with file:

SU - self explanatory

Fall 20 - Term

Batch 33 - File number, start at 1, increment per file, per term

Distro App Upload File - self explanatory

20201203 - Date file was uploaded

**Uploading the file**

In the SU Asset Track site, click on Remote Distro.

In the Upload file area, click on Choose File and choose the file you saved above.

After you have selected the file, click Upload File.

Once the file is uploaded and processed, add “\*DONE - “ to the beginning of the file name in the folder in Google Shared drive.

## Backend Processes

**Pre-sync check**

A scheduled task (SU CDW Import Poller) that runs every 15 minutes on the server monitors the upload folder for new files. When a new file is found, the file is scanned and a check is made with WHD to make sure the required asset models exist. If everything checks out, an email is sent to Ben Sawyer (Clutch), Don Silvius, and Tom Anderson after the students and their associated devices are imported into the holding table.



If there is an issue, an email is sent to the same people alerting there was an issue with the pre-sync check. The file is either processed or not, no partial processing is performed if any asset models are not found. Any additional file(s) in the upload folder will still be processed according to the same rules.

**Data processing**

Every 30 minutes at the top and bottom of the hour, a scheduled task (SU Asset Distribution Synch) runs on the server that will process any student device records as Synched=0. When the file is processed, the following things are done as the data in the file is processed:

The asset is created in WHD and its information is populated based on the details in the template file.

The asset is assigned (linked) to the student’s Client record in WHD.

A note is added to the asset’s record that it was processed by the Distro App.

The Student Device record is marked as Synched = 1.

An electronic iMLearning Program Lease Agreement is generated for the student.

For each student’s entry in the Distro App database, a unique GUID that was auto-created during the initial import process is used to build the URL to their specific iML agreement.

An email is sent to the student that includes details on their assets and instructs the student that they must sign the iML Lease Agreement electronically. The email includes the students unique URL to their agreement. A screen shot of this email is in the Appendix.

Student is marked as processed in the Distro App database and a time stamp is included for when the email requesting them to sign the agreement was sent. A “send count” is also incremented from its initial value of 0 (zero) at this point. This count is incremented every time an email reminder is (re)sent.

**Agreement processing**

When the student clicks their unique URL, they are taken to a web site that displays theirs iMLearning Program Lease Agreement, which will display a description of and asset tag and serial numbers of the assets assigned to them. At the bottom of the lease agreement, there is a place to electronically sign the agreement.

When the agreement is signed, a PDF version of the agreement, including their name, and notation that it was signed electronically, is generated and emailed to the student. A copy is placed on an SU file server at the following path:

FS1 > Admin > Dept > Handout

The student Holding Record is then updated with the student name, date of e-signature, an ESig\_Agreement = 1, which effectively completes the record.

A screen shot of the email sent to the student after signing the agreement is shown in the Appendix.

## Reporting and Resending Agreements

The Distro App dashboard provides basic reporting capabilities and a way to resend the lease agreement signature request email. The dashboard is shown below.



Downloadable reports are available for E-Signed and Unsigned Agreements. Simply click the “Click for report” link for the one you’d like to download.

A list of all Unsigned Agreements is available in the bottom portion of the dashboard and their status is color coded in the far right column. Students that were sent a reminder less than 7 days ago will be green, over 7 days but less than 14 will be yellow, and over 14 days ago will be red.

To resend to an individual student, simply the click the Resend link in the last column and click OK in the confirmation. To resend to a group of students, use the “Resend All Greater Than 7” or “Resend All Greater Than 14” buttons at the top of the list.

## Student Device Lookup / Management

Occasionally, it may be necessary to lookup and/or remove assets from a student’s record in the app. This could be the result of incorrect shipping information being provided to us, the student leaving school, or other reasons.

Use the Student Device Lookup / Management section to view the assets associated with the student in the DIstro App (this does not query WHD, only the Distro App database), or to remove an asset, or set of assets, from a student. To view a student’s associated assets, simply enter their SUnet username in the “Student UserName:” field and click “Click to get User’s device list”. 

Click “Detach” and you will be presented with a dialog box. Choose the new status of the device the “Select status:” menu and enter a note on why the item is being detached/updated. 

Click “Continue” and the app will process the request and the asset will be assigned the new status in WHD and your note will be added to the Notes field for the asset in WHD. If all assets are detached, this will remove the student from the holding table and then the student will not show up in the unsigned list or get “resend” emails.

IMPORTANT: This does not unassign the asset from the student in WHD, that will need to done manually.

## Appendix



| Template Data Reference | | | |
| --- | --- | --- | --- |
| **Column** | **Description** | **Sample Data** | **Notes** |
| Order # | Not used by app | N/A | Not used by app |
| Ship | Not used by app | N/A | Not used by app |
| DEP | Not used by app | N/A | Not used by app |
| iPad Tag # | iPad Asset Tag Number | M008173 | Required |
| iPad SN | iPad Serial Number | DLXXV0NMK7M9 | Distro App will strip out any leading spaces and the “S” that is captured when barcode is scanned. |
| iPad Model | iPad Model | iPad (7th gen) Wi-Fi | The model must exist in WHD before you upload the file. |
| iPad Purchase Date | Date Purchased | 7/1/20 | Required |
| MacBook Tag # | MacBook Asset Tag Number | L012932 | Required |
| MacBook SN | MacBook Serial Number | C02D711BP3YX | Distro App will strip out any leading spaces and the “S” that is captured when barcode is scanned. |
| MacBook Model | MacBook Model | MacBook Pro (13-inch, 2020, Two Thunderbolt 3 ports) | The model must exist in WHD before you upload the file. |
| MacBook Purchase Date | Date Purchased | 7/1/20 | Required |
| Pencil Tag # | Apple Pencil Asset Tag Number | X008476 | Virtual tag number created manually in the template file before asset is imported; must check WHD before importing to find correct range to use. |
| Pencil SN | Apple Pencil Serial Number | FQ9R9BULGWTJ | Distro App will strip out any leading spaces and the “S” that is captured when barcode is scanned. |
| Pencil Model | Apple Pencil Model | Apple Pencil | The model must exist in WHD before you upload the file. |
| Pencil Purchase Date | Date Purchased | 7/1/20 | Required |
| UPS Tracking # | Not used by app | N/A | Not used by app |
| SU ID | Student SU ID Number | 0123456 | Required |
| First Name | Student First Name | Jane | Required |
| Last Name | Student Last Name | Student | Required |
| Addr Line 1 | Address (optional) | 1460 University Drive | Optional, app does not require but okay to leave if your list contains the info. |
| City | City | Winchester | Optional, app does not require but okay to leave if your list contains the info. |
| State | State | VA | Optional, app does not require but okay to leave if your list contains the info. |
| Postal Code | Postal (Zip) Code | 22601 | Optional, app does not require but okay to leave if your list contains the info. |
| SU Email | Student SU Email Address | [student@su.edu](mailto:student@su.edu) | Required |
| Program | Student Degree Program | CyberSecurity | Optional, app does not require but okay to leave if your list contains the info. |
| iPad Budget Source | Budget that funded purchase | iMLearning Budget | Required |
| MacBook Budget Source | Budget that funded purchase | iMLearning Budget | Required |
| Pencil Budget Source | Budget that funded purchase | iMLearning Budget | Required |
| iPad Purchased From | Vendor name | CDW-G | Required |
| MacBook Purchased From | Vendor name | CDW-G | Required |
| Pencil Purchased From | Vendor name | CDW-G | Required |
| iPad CRP | Is the device covered by Apple Capital Refresh Plan? | Yes | Yes or No only; needs to be added to lease when ordered |
| MacBook CRP | Is the device covered by Apple Capital Refresh Plan? | Yes | Yes or No only; needs to be added to lease when ordered |
| Pencil CRP | Is the device covered by Apple Capital Refresh Plan? | Yes | Yes or No only; needs to be added to lease when ordered |

**Sample PDFs of the Lease Agreement Web Pages**

A sample of the lease agreement page can be found here:

Google Drive > Shared drives > Institutional Computing > iMLearning > \*Policies & Procedures > IC Asset Track App > SU Asset Distribution User Agreement.pdf

A sample of the lease agreement page displayed after the student signs can be found here:

Google Drive > Shared drives > Institutional Computing > iMLearning > \*Policies & Procedures > IC Asset Track App > SU Asset Distribution User Agreement - Post Signature.pdf