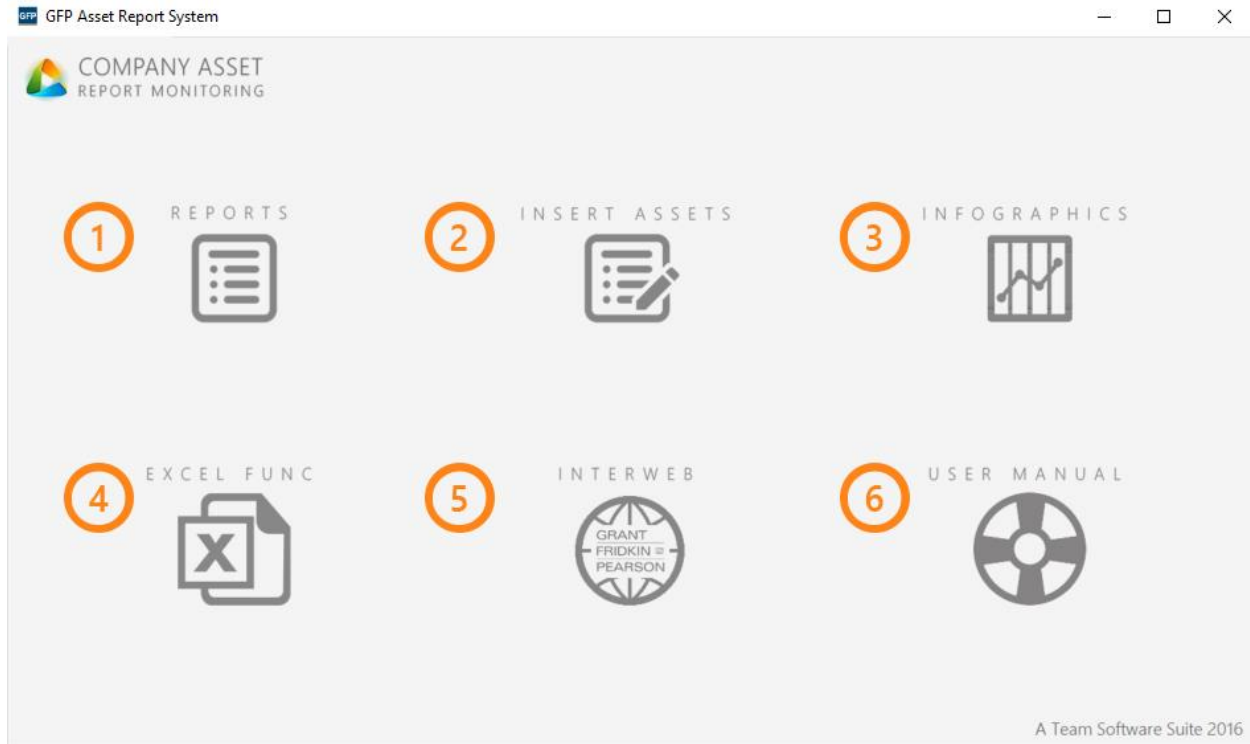


Company Asset Report Monitor Application

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Overview



After you have successfully logged on, you will be brought to this main screen. From this main screen you will have access to all features of the program such as adding assets, editing assets, and generating reports. Below, each icon is outlined explaining its function.

1. Reports

- This feature gives the user the ability to see assets based on information given. For example, the user can ask to see all assets over \$500.00, the table to the right will display all qualifying assets. From there user can either print the results or export to excel for further editing.

2. Insert Assets

- Within this feature you can add an asset and also edit existing assets.

3. Infographics

- **Infographics give you a great way to view your assets at a glance through line, bar, or pie charts.**

4. Excel Functions

- **The feature give the user the ability to bring in a large amount of assets in a batch rather than one by one through the user of import. Export allows the user to download all assets in an excel file for editing, logging, and/or backup purposes.**

5. Interweb

- **This button is linked to the official Grant Fridkin Pearson website, if internet connection is available the user will be taken to the website.**

6. User manual

- **If you are reading this, you know what that button does!**

How to Create Reports

The screenshot shows the 'Reports' application window. On the left, there are three sections for generating reports:

- Assets over \$500:** Includes a 'Select All' dropdown (Assets over \$500), 'From Room No.', 'From Year', 'to Year', 'From Category' (ArtWork), and a 'Run' button.
- Deactivated Assets:** Includes a 'Select all' dropdown (Deactivated assets), 'From Category' (ArtWork), and a 'Run' button.
- Assets by Categories:** Includes a 'Select All' dropdown (Assets from category), 'From Category' (ArtWork), and a 'Run' button.

The 'Assets over \$500' report is selected, and its data is displayed in a table with the following columns: Item_Name, Item..., Category, ID_Tag, Room, Floor, Date_Ac.

Item_Name	Item...	Category	ID_Tag	Room	Floor	Date_Ac
Framed Watercolor of Bea...		ArtWork	1			1997-05
Framed Watercolor of Man...		ArtWork	3			1997-09
Painting (Cortina/Darvish)		ArtWork	4			1996-12
Twilight Lake		ArtWork	5			2002-04
Murex		ArtWork	8			2002-04
November Light		ArtWork	9			2002-04
Barefoot Beach		ArtWork	16			2002-04
Ribaut Island		ArtWork	21			2002-04
Sunrise		ArtWork	22			2002-04
moonrise		ArtWork	23			2002-04
Lagoon Shadows		ArtWork	28			2002-04
Flowering Grasslands		ArtWork	80			2002-04
Headwind		ArtWork	93			2002-04
Headliner		ArtWork	97			2002-04
A Risen Day		ArtWork	100			2002-04
Palms in a Row		ArtWork	103			2002-04
Old Naples		ArtWork	106			2002-04
Black Skimmers		ArtWork	107			2002-04
Woodpeckers		ArtWork	108			2002-04
Great Blue Heron		ArtWork	109			2002-04
Morning Doves		ArtWork	113			2002-04
Nautilus		ArtWork	130			2002-04

At the bottom of the window, there are 'Print' and 'Export to Excel' buttons.

As mentioned earlier in the guide, here you can filter your assets to only display what you want based on predefined reports called queries.

Here are the list of reports you can generate:

Assets Category

- Assets over \$500
- Assets over \$500 & Year acquired
- Assets over \$500 within year range
- Assets by room #
- Assets over \$500 from category
- Assets over \$500 from category & year acquired

Deactivated Assets Category

- Deactivated assets

- Deactivated assets from category

Category

- Assets from category

Expired

- Expired assets to date
- Expired assets by year
- Warranty expiration by year
- Lease expiration by year

Creating Reports:

Step 1.) The first drop down of each category is labeled “Select all” , within that drop are the list of report options you can choose from. Find the category that your desired filter belongs to.

(Ex: “Asset by room number” belongs to the first “Asset” category group)

Step 2.) Once you find the group from step 1, select the drop down to find the filter that fits your needs.

Step 3.) Next, depending on which report you chose to run, some fields may need input. Fill out appropriate fields and click its corresponding run button.

Note: There are three separate run buttons each one pertaining to the group directly above them.

Step 3.) The Table should instantly update and only show assets that meet your specified requirements.

Step 4.) You have now created a report. Now you can either print those assets (see printing reports pg. 6), export them to excel for further editing without effecting the database (see Export Reports pg. 6), or you can simply view and run another report.

How to Print Reports

Step 1.) After you have created a report (see pg. 5), press print button located under the table.

Step 2.) A print dialog box will appear and you may select which printer you want to print from. Also it may help to see the data better in Landscape Mode, so if possible, change the orientation to Landscape.

Your report should print from selected printer with only the assets in your created report.

Tip: If you would like to save the report in a pdf, select PDF or Microsoft Print to PDF to save as a PDF file format.

How to Export Reports

Step 1.) In the reports window once you have created a report (see pg. 6), press export.

Step 2.) Excel will then launch and load all assets from that report into organized rows and columns with labeled headers for ease of use.

Note: Excel must be install for program to export to excel. Do not run if not install.

How To Insert An Asset

Step 1.) From the main screen (shown on pg. 2) click on insert asset.

Step 2.) The Insert Asset frame will open with a table on the right hand pane. (Shown below)

Insert Asset

* Item Name:

Item Description:

* Category:

* ID Tag:

Room #:

Floor #:

* Date Acquired:

Ownership:

Lease Term:

Lease Expiration:

Rent Due Date:

Supplier:

Manufacturer:

Model #:

Item_Name	Item_Description	Category	ID_Tag	Room	Floor	Da
Framed Watercolor of Bea...		ArtWork	1			196
Framed Watercolor of Man...		ArtWork	3			196
Painting (Cortina/Darvish)		ArtWork	4			196
Twilight Lake		ArtWork	5			20
Murex		ArtWork	8			20
November Light		ArtWork	9			20
Barefoot Beach		ArtWork	16			20
Ribaut Island		ArtWork	21			20
Sunrise		ArtWork	22			20
moonrise		ArtWork	23			20
Lagoon Shadows		ArtWork	28			20
Flowering Grasslands		ArtWork	80			20
Headwind		ArtWork	93			20
Headliner		ArtWork	97			20
A Risen Day		ArtWork	100			20
Palms in a Row		ArtWork	103			20
Old Naples		ArtWork	106			20
Black Skimmers		ArtWork	107			20
Woodpeckers		ArtWork	108			20
Great Blue Heron		ArtWork	109			20
Morning Doves		ArtWork	113			20
Nautilus		ArtWork	130			20
Tonna		ArtWork	141			20
Sunset		ArtWork	142			20

Insert Update Clear Fields

Step 3.) Fill out all fields you wish to have information. Some fields may be left empty, with the exception of the 5 required fields marked with an asterisk.

Step 4.) After all information you wish to enter is filled in, click Insert.

Step 5.) If no errors occurred (such as required field left empty), the new asset should appear at the bottom of the table.

Editing an Existing Asset

Step 1.) From the main screen (shown on pg. 2), click Insert Asset.

Step 2.) The Insert Asset will open with a table to the right hand side.

Step 3.) Find the asset that you would like to edit and click on the item name of that asset.

The screenshot shows the 'Insert Asset' window. On the left is a form with the following fields: * Item Name (Barefoot Beach), Item Description (empty), * Category (ArtWork), * ID Tag (16), Room # (empty), Floor # (empty), * Date Aquired (2002-04-05), Ownership (Owned), Lease Term (- -), Lease Expiration (- -), Rent Due Date (- -), Supplier (empty), Manufacturer (empty), and Model # (empty). At the bottom are buttons for Insert, Update, and Clear Fields. On the right is a table with columns: Item_Name, Item_Description, Category, ID_Tag, Room, Floor, and Da. The table lists various art assets, and the row for 'Barefoot Beach' is highlighted in blue.

Item_Name	Item_Description	Category	ID_Tag	Room	Floor	Da
Framed Watercolor of Bea...		ArtWork	1			19
Framed Watercolor of Man...		ArtWork	3			19
Painting (Cortina/Darvish)		ArtWork	4			19
Twilight Lake		ArtWork	5			20
Murex		ArtWork	8			20
November Light		ArtWork	9			20
Barefoot Beach		ArtWork	16			20
Ribaut Island		ArtWork	21			20
Sunrise		ArtWork	22			20
moonrise		ArtWork	23			20
Lagoon Shadows		ArtWork	28			20
Flowering Grasslands		ArtWork	80			20
Headwind		ArtWork	93			20
Headliner		ArtWork	97			20
A Risen Day		ArtWork	100			20
Palms in a Row		ArtWork	103			20
Old Naples		ArtWork	106			20
Black Skimmers		ArtWork	107			20
Woodpeckers		ArtWork	108			20
Great Blue Heron		ArtWork	109			20
Morning Doves		ArtWork	113			20
Nautilus		ArtWork	130			20
Tonna		ArtWork	141			20
Sunset		ArtWork	142			20

Step 4.) The assets row will be highlighted (as seen above) and it will automatically populate all fields that contain information.

Step 5.) Edit existing information or add information to the asset via the text fields and drop downs.

Step 6.) Lastly, after all information is in, click on Update. You should see the change automatically take place.

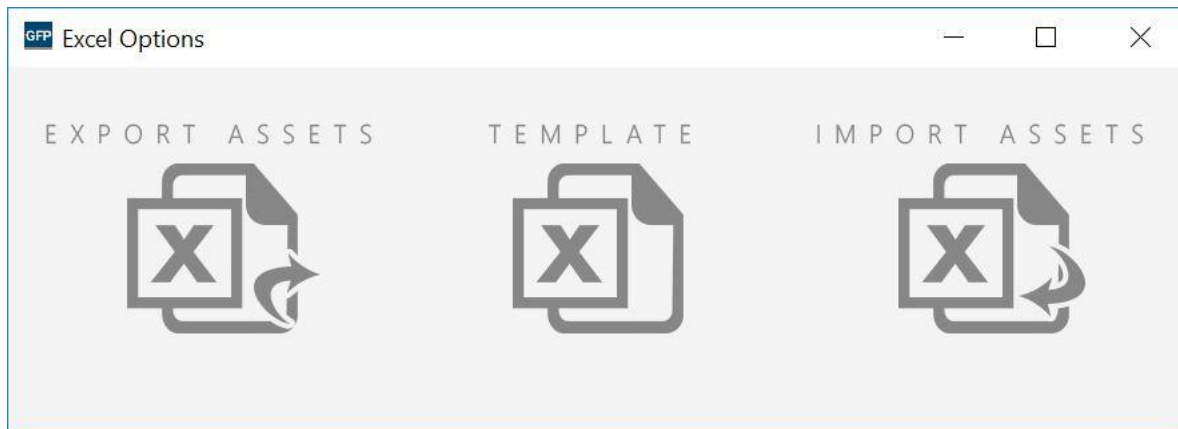
Note: When editing an asset you may not change Id Tag. Once an Id tag has been assigned you cannot edit that tag.

Excel Function

How to Import from Excel:

Step 1.) From the main screen, click Excel Func.

Step 2.) Next, the Excel Options frame will open. (Shown below)



Step 3.) Click excel template.

Step 4.) Excel will open, and load a file with only headers at the top. This is the standard format for the asset data.

Step 5.) Simply insert the data according to the template file and save the excel file.

Step 6.) Now go back to the program and click Import Assets.

Step 7.) A dialog window will open, choose the file that you inserted data into in step 5, and click open.

Step 8.) Lastly, a dialog window will open confirming file has been inserted into the database.

How to Export All Assets to Excel:

Step 1.) From the main screen, click Excel Func.

Step 2.) Next, the Excel Options frame will open. (Shown below)



Step 3.) Click Export Assets

Step 4.) Excel will open and load all assets in the database.

Note: This function will only work if Excel is installed on the computer. Also any changes made to assets here will not effect or show within the program or database. If you want to edit assets see Editing Assets on pg. 8.

Troubleshooting:

Reports:

- If the table is empty no assets correspond to the data that has been input into the text fields.
- If table is empty and user presses print or export to excel a blank sheet will be generated.
- If reports are not generating correctly verify the proper input is being put into the columns. Certain columns require a certain input. For example, ID tag, Deactivated, Year, and room only accept certain values.

Editing Assets:

- When editing assets the dashes that come preloaded in the text field are erased, be sure to include the dashes when entering the date (mm-dd-yyyy).

Company website:

- In the future if the company website name is changed the website button will load the previous web address.

Exporting to excel:

- User must have Microsoft excel downloaded for this feature to work.
- If assets are not loading correctly make sure data is being input in the proper format, Room number must be an integer, Date acquired must be MM-DD-YYYY, ID Tag must also be an integer, price must be an integer, or decimal value.
- Export Excel may open a duplicate excel file when clicked.

Programming Credits

A-Team Studios

Merzier Petite

Steven Joy

Rodolfo Trevino

James M. DeSeno