



“How to” Processes in Wise Track

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How to Assign Assets to Employees in Wise Track Web

Please only use Google Chrome, Firefox or Safari to access Wise Track Web.

To log in to Wise Track Web, please see link: <https://wtprod.alamo.edu/wisetrack/>

For first-time users: Username and Password is same as your ACES username. You will be prompted to change your password after initial login.

If you have changed your password and forgotten it, you may contact Inventory Control for reset at dst-TeamInventory@alamo.edu

1. At the start up screen, you will see the WiseStart Barcode Search screen. Enter the tag number(s) for property in the left search box. (Press 'Enter' after each number entered for multiple entries)
2. Click on 'Verify'; Wise Track will populate active tag numbers in the next window on the right side.
3. Click on 'View Found Assets' button, bottom right.
4. Add a check mark in the box next to Clipboard to select multiple items to assign to an employee or only check the box next to the item that will be assigned. (See screenshots below)

(Update All Property)

Selection	Clipboard	Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number
Select Edit	<input checked="" type="checkbox"/>	No	TEST 899999:TEST	SAC MLC RM 100A - STORAGE	TEST			
Select Edit	<input checked="" type="checkbox"/>	Yes	138895 893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65		COMPUTER DELL		OPTIPLEX	5GQTG42
Select Edit	<input checked="" type="checkbox"/>	Yes	433200 893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65		TABLET	HEWLETT PACKARD ELITE X2		5CG8250FC2

Or

(Update Single Item)

Selection	Clipboard	Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number
Select Edit	<input type="checkbox"/>	No	TEST 899999:TEST	SAC MLC RM 100A - STORAGE	TEST			
Select Edit	<input checked="" type="checkbox"/>	Yes	138895 893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65		COMPUTER DELL		OPTIPLEX	5GQTG42
Select Edit	<input type="checkbox"/>	Yes	433200 893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65		TABLET	HEWLETT PACKARD ELITE X2		5CG8250FC2

5. From the menu tab, select Clipboard, then 'View Assets in Clipboard'.



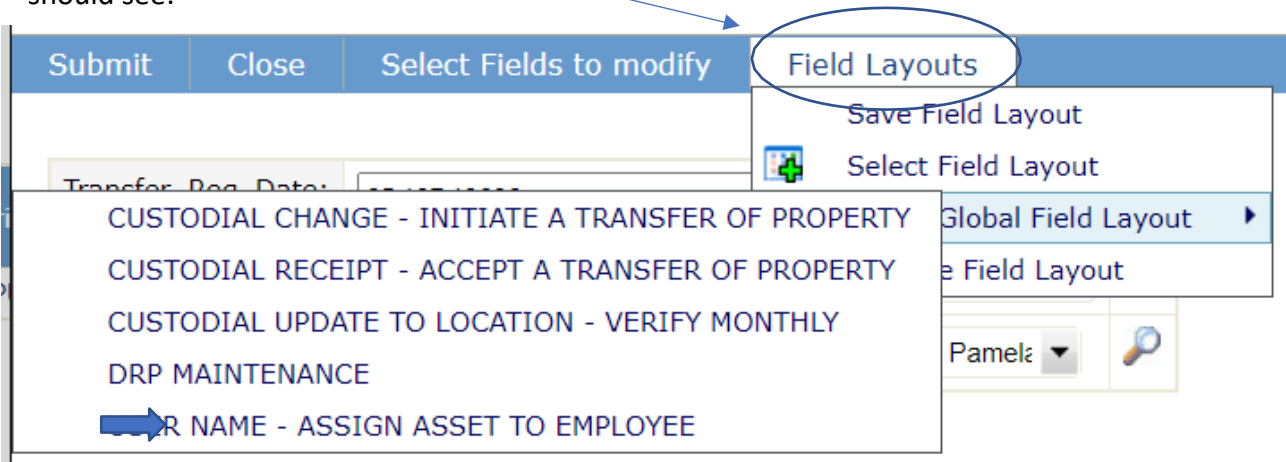
6. You will be directed to the Clipboard Asset List modification screen.
7. From the menu tab, select Clipboard, then 'Modify'.



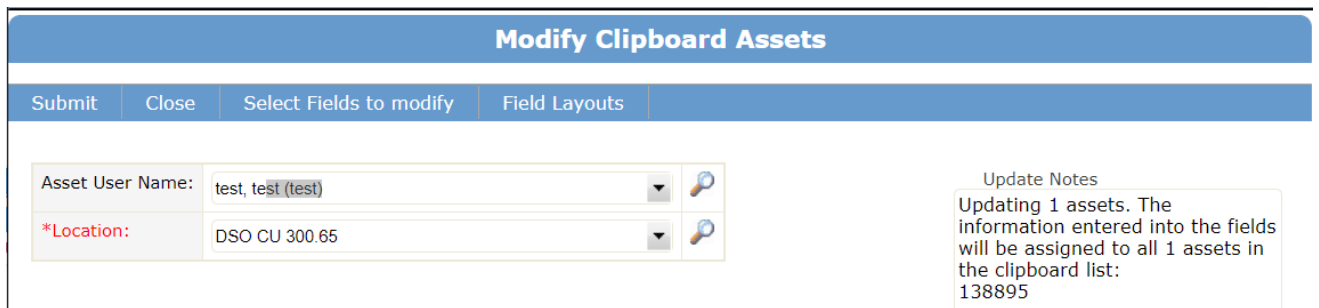
The 'Modify Clipboard Assets' pop-up window will appear.

See next page for additional instructions

8. Select 'Field Layouts' and use the dropdown feature to select 'Select Global Field Layout' then select 'USER NAME – ASSIGN ASSET TO EMPLOYEE'. Here is what you should see:





9. In the 'Asset User Name' field, begin typing the LAST NAME of the employee. Continue in the format shown below. Employee names will auto-populate as you type. You can select the employee from the dropdown menu. *Ensure the username in parentheses is correct.



10. In the “*Location” Field, you can type in the location of the item in this format:
CAMPUS – BLDG – RM – RM# (ex. SAC MLC RM 102)

The dropdown menu will populate as you type the location.



*Location:	SAC MLC RM 102		
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IMPORTANT Locations are pre-populated. If you do not see a location populated in the dropdown menu, then it will not register in the Location Field. Please contact Inventory Control if you need a specific location created.

11. Next, click Submit.

The 'Update Notes' box to the right will annotate confirmed updates have been made.

12. Click the "Close" button.

Review your column view to confirm an item was assigned correctly. If you have added the option to your Column View, you should see the employees name in the Asset User column. Refer to the training document [Updating the Column View in Wise Track Web](#) for more information.



How to Initiate a Transfer to a Different Department in Wise Track Web

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1. At the start up screen, you will see the WiseStart Barcode Search screen. Enter the tag number(s) for property in the left search box. (Press 'Enter' after each number entered for multiple entries) Click on 'Verify'; Wise Track will populate active tag numbers in the next window on the right side.
2. Click on 'View Found Assets' button, bottom right.
3. Add a check mark in the box next to Clipboard to select all property for transfer or only check the box next to the item that needs to be transferred. (See screenshots below)

(Update All Property)

Selection	Clipboard	Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number
Select Edit	<input checked="" type="checkbox"/>	No	TEST 899999:TEST	SAC MLC RM 100A - STORAGE	TEST			
Select Edit	<input checked="" type="checkbox"/>	Yes	138895 893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65		COMPUTER DELL		OPTIPLEX	5GQTG42
Select Edit	<input checked="" type="checkbox"/>	Yes	433200 893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65		TABLET	HEWLETT PACKARD ELITE X2		5CG8250FC2

Or

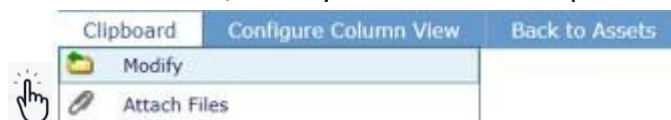
(Update Single Item)

Selection	Clipboard	Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number
Select Edit	<input type="checkbox"/>	No	TEST 899999:TEST	SAC MLC RM 100A - STORAGE	TEST			
Select Edit	<input checked="" type="checkbox"/>	Yes	138895 893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65		COMPUTER DELL		OPTIPLEX	5GQTG42
Select Edit	<input type="checkbox"/>	Yes	433200 893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65		TABLET	HEWLETT PACKARD ELITE X2		5CG8250FC2

4. From the menu tab, hover your cursor over Clipboard, then click on 'View Assets in Clipboard'.



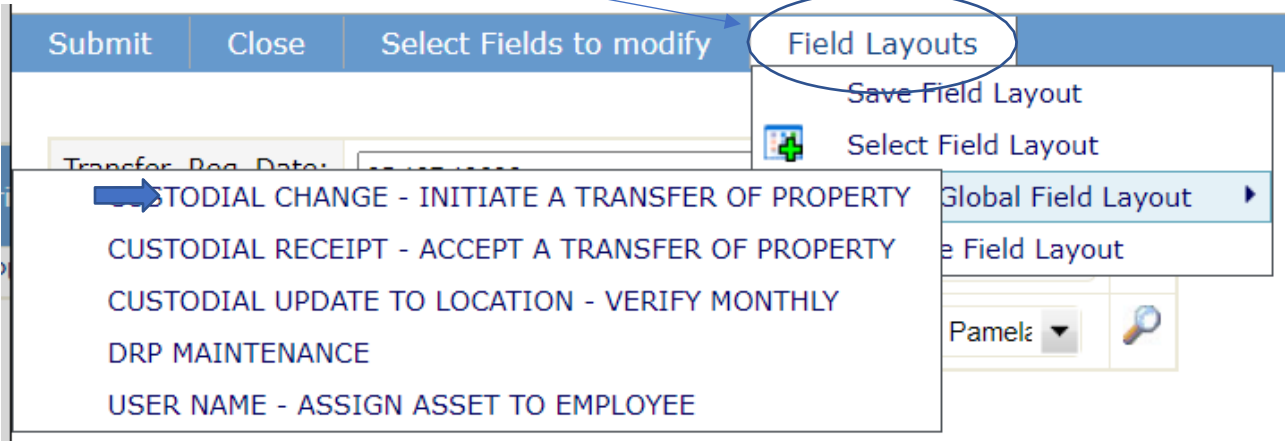
5. You will be directed to the Clipboard Asset List modification screen.
6. From the menu tab, hover your cursor over Clipboard again, then click on 'Modify'.





The 'Modify Clipboard Assets' pop-up window will appear.

7. Select 'Field Layouts' and use the dropdown feature to select 'Select Global Field Layout' then select 'CUSTODIAL CHANGE - INITIATE A TRANSFER OF PROPERTY'. Here is what you should see:

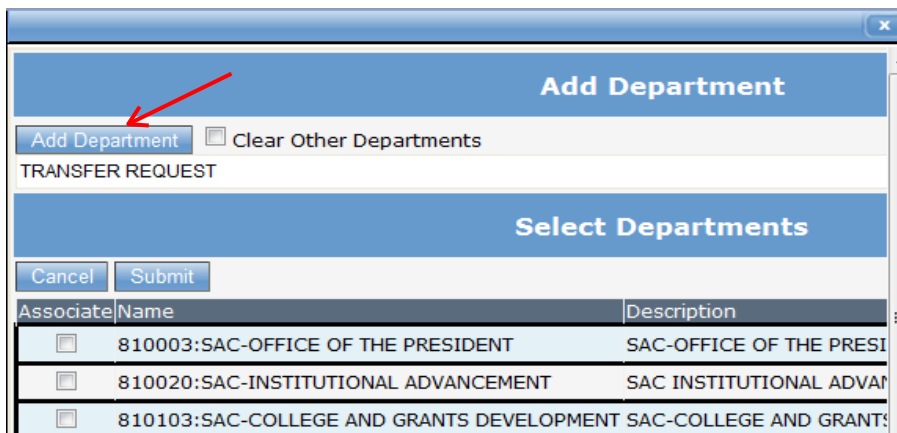


8. On the 'Transfer_Req_Date' line, click on the calendar icon and choose today's date.




9. In the 'Departments' field, click on the magnifying glass to open the department table. The Add Department dialog box will appear.
10. In the "open field", below the Add Department option, type 'TRANSFER REQUEST'. Click on the TRANSFER REQUEST selection from the dropdown menu to make sure it populates. The 'Clear Other Departments' box is currently checked; **you must "uncheck" this box** in order for your transfer to be viewed by the intended Property Steward. Again, this box must be UNCHECKED at this point.

Your view should look like this:

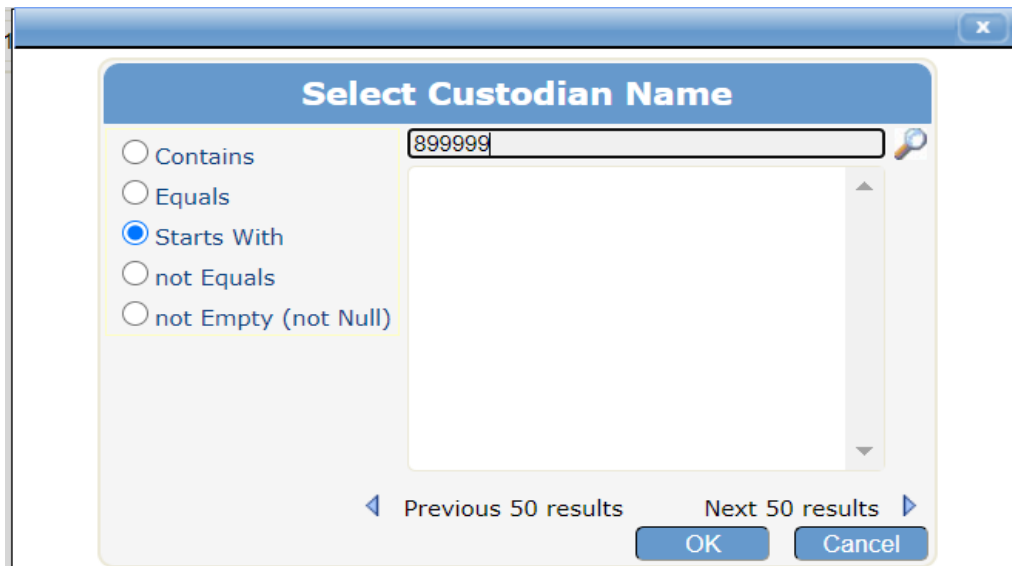


- 11. After selecting 'TRANSFER REQUEST', click the 'Add Department' button.
- 12. The 'Departments:' field should look like this: (your department FOAP:NAME, "TRANSFER")

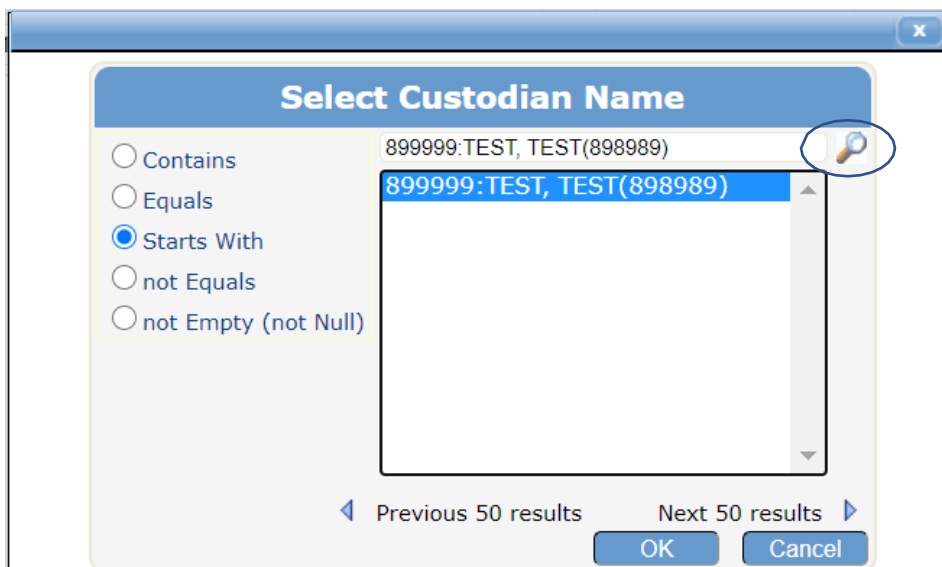
Departments: 

- 13. Click on the magnifying glass at the end of 'Custodian Name'
See next page for additional instructions

- 14. The 'Select Custodian Name' screen will come up.
- 15. Type the FOAP into the field that you are transferring the item(s) to





- 16. Click the magnifying glass to populate the selected department





17. Click OK to populate the selected department into the Custodial Name field

Custodian Name:	899999:TEST, TEST(898989)		
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18. Next, click Submit.

The 'Update Notes' box to the right will annotate confirmed updates have been made.

19. Click the "Close" button.

The location of the item will remain the same until the transfer is accepted by the new Property Steward. Please follow up with the department within 7-10 working days if you still show the item is assigned to your department. You are still the responsible Property Steward until the receiving department has completed the acceptance process.

How to Accept a Transfer in Wise Track Web

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If you have changed your password and forgotten it, you may contact Inventory Control for reset at dst-TeamInventory@alamo.edu

1. At the start up screen, you will see the WiseStart Barcode Search screen. Enter the tag number(s) for property in the left search box. (Press 'Enter' after each number entered for multiple entries)
2. Click on 'Verify'; Wise Track will populate active tag numbers in the next window on the right side.
3. Click on 'View Found Assets' button, bottom right.
4. Add a check mark in the box next to Clipboard to select all transferred property to be accepted or only check the box next to the item that needs to be accepted. (See screenshots below)

(Update All Property)

Selection	Clipboard	Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number
Select Edit	<input checked="" type="checkbox"/>	No	TEST 899999:TEST	SAC MLC RM 100A - STORAGE	TEST			
Select Edit	<input checked="" type="checkbox"/>	Yes	138895 893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65		COMPUTER DELL		OPTIPLEX	5GQTG42
Select Edit	<input checked="" type="checkbox"/>	Yes	433200 893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65		TABLET	HEWLETT PACKARD	ELITE X2	5CG8250FC2

Or

(Update Single Item)

Selection	Clipboard	Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number
Select Edit	<input type="checkbox"/>	No	TEST 899999:TEST	SAC MLC RM 100A - STORAGE	TEST			
Select Edit	<input checked="" type="checkbox"/>	Yes	138895 893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65		COMPUTER DELL		OPTIPLEX	5GQTG42
Select Edit	<input type="checkbox"/>	Yes	433200 893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65		TABLET	HEWLETT PACKARD	ELITE X2	5CG8250FC2

5. From the menu tab, hover your cursor over Clipboard, then click on 'View Assets in Clipboard'.

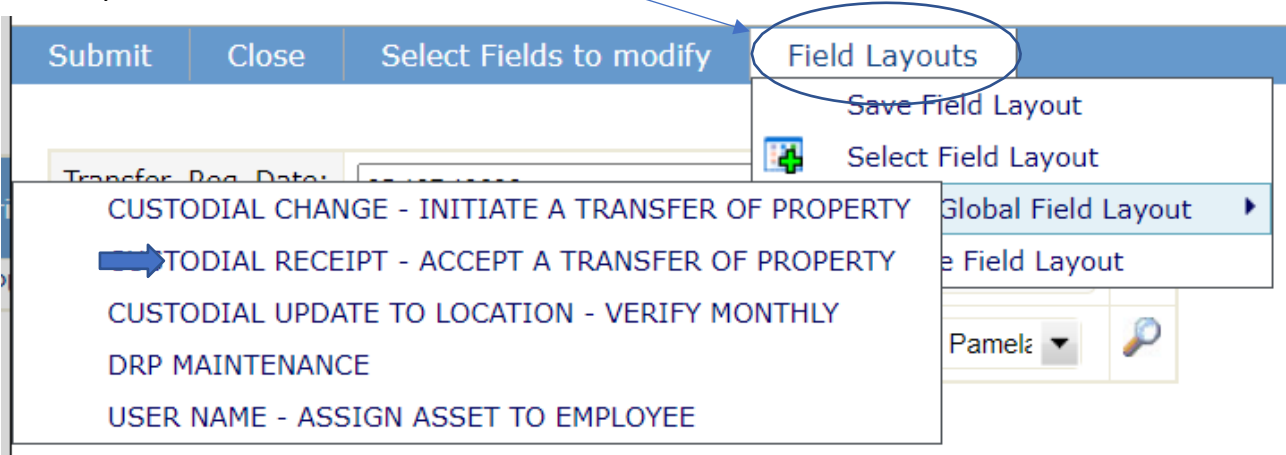


6. You will be directed to the Clipboard Asset List modification screen.
7. From the menu tab, hover your cursor over Clipboard again, then click on 'Modify'.

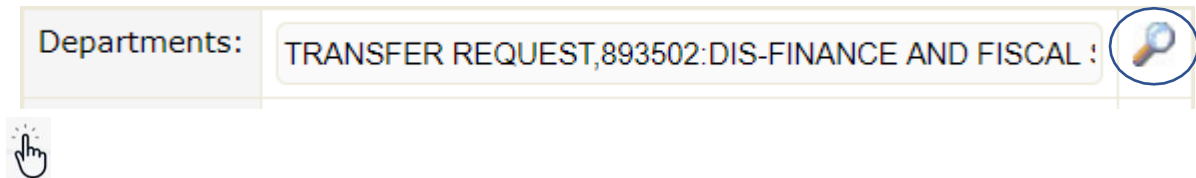


The 'Modify Clipboard Assets' pop-up window will appear.

8. Select 'Field Layouts' and use the dropdown feature to select 'Select Global Field Layout' then select 'CUSTODIAL RECEIPT - ACCEPT A TRANSFER OF PROPERTY'. Here is what you should see:



9. In the 'Departments' field, click on the magnifying glass to open the department table. The Add Department dialog box will appear.



See next page for additional instructions



10. In the “open field”, below the Add Department option, type your FOAP number. Click on your department FOAP that shows in the dropdown menu to make sure it populates. The ‘Clear Other Departments’ box is currently checked; **you must “leave this box checked”** in order to remove the transfer affiliation.

Your view should look like this:

Associate Name	Description
<input type="checkbox"/> 810003:SAC-OFFICE OF THE PRESIDENT	SAC-OFFICE OF THE
<input type="checkbox"/> 810021: SAC-BUDGET OFFICE	SAC-BUDGET OFFICE
<input type="checkbox"/> 810103:SAC-COLLEGE AND GRANTS DEVELOPMENT	SAC-COLLEGE AND C
<input type="checkbox"/> 810105:SAC-DIVERSITY EQUITY AND INCLUSIVE EXCELLENCE	SAC-DIVERSITY EQU
<input type="checkbox"/> 810501:SAC-PUBLIC INFORMATION	SAC PUBLIC INFORM
<input type="checkbox"/> 811001:SAC-VP FOR ACADEMIC SUCCESS	SAC VICE PRESIDEN
<input type="checkbox"/> 811002:SAC-DUAL CREDIT	SAC-DUAL CREDIT

11. After selecting your Department FOAP, click the ‘Add Department’ button. Remember the “Clear Other Departments” must be checked.
12. After completing the previous steps, the ‘Departments:’ field should now look like this:

13. In the “*Location” Field, you can type in the location of the item in this format:
CAMPUS – BLDG – RM – RM# (ex. SAC MLC RM 102)

The dropdown menu will show as you type the location.

IMPORTANT Locations are pre-populated. If you do not see a location populated in the dropdown menu, then it will not register in the Location Field. Please contact Inventory Control if you need a specific location created.

See next page for additional instructions



14. Next, click Submit.

The 'Update Notes' box to the right will annotate confirmed updates have been made.

15. Click the "Close" button.

Review your column view to confirm the item(s) processed correctly. You should only see your Department listed in the 'Departments' column.



How to Check-Out and Check-In Assets in Wise Track Web

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Check-Out an item

1. At the start up screen, you will see the WiseStart Barcode Search screen. Enter the tag number(s) for property in the left search box. (Press 'Enter' after each number entered for multiple entries)
2. Click on 'Verify'; Wise Track will populate active tag numbers in the next window on the right side.
3. Click on 'View Found Assets' button, bottom right.
4. Add a check mark in the box next to Clipboard to select multiple items to assign to an employee or only check the box next to the item that will be assigned. (See screenshots below)

(Update All Property)

Selection	Clipboard	Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number
Select Edit	<input checked="" type="checkbox"/>	No	TEST	899999:TEST	SAC MLC RM 100A - STORAGE TEST			
Select Edit	<input checked="" type="checkbox"/>	Yes	138895	893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65	COMPUTER DELL		OPTIPLEX	5GQTG42
Select Edit	<input checked="" type="checkbox"/>	Yes	433200	893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65	TABLET	HEWLETT PACKARD	ELITE X2	5CG8250FC2

Or

(Update Single Item)

Selection	Clipboard	Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number
Select Edit	<input type="checkbox"/>	No	TEST	899999:TEST	SAC MLC RM 100A - STORAGE TEST			
Select Edit	<input checked="" type="checkbox"/>	Yes	138895	893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65	COMPUTER DELL		OPTIPLEX	5GQTG42
Select Edit	<input type="checkbox"/>	Yes	433200	893502:DIS-FINANCE AND FISCAL SERVICES DSO CU 300.65	TABLET	HEWLETT PACKARD	ELITE X2	5CG8250FC2

5. From the menu tab, select Clipboard, then 'View Assets in Clipboard'.



6. You will be directed to the Clipboard Asset List modification screen.

See next page for additional instructions



7. Hover over the **Clipboard** tab and Scroll down to the **Check-Out** feature. Click on this option.

8. In the ***Checked Out To** field, type the employees LAST name first. The dropdown menu will auto-populate with names. Highlight the employee that the item will be checked out to.

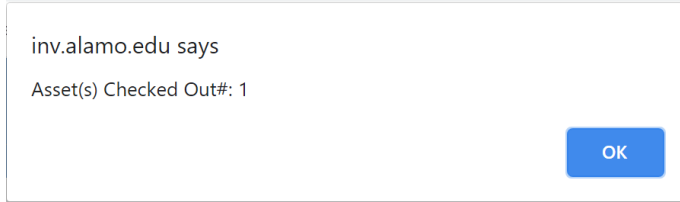
9. In the Due Date field, Select the calendar icon and enter the return date the employee needs to **return the item to campus**. Use the current fiscal year ending. (Ex. 08/31/2021)
10. Update the location field to 'OFF-CAMPUS' if the item will be taken away from campus.



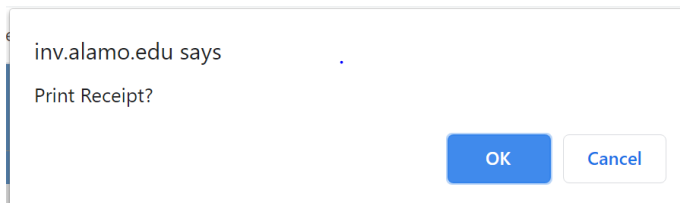
11. In the **'Notes:'** field, you can enter in data that will help identify the items during an inventory.

12. Click **Submit**

13. **Click OK** when the box pops up indicating the item has been checked out



14. **Click Cancel** when this box pops up. Your receipt is the Loaned Property Request Form signed by your Supervisor.

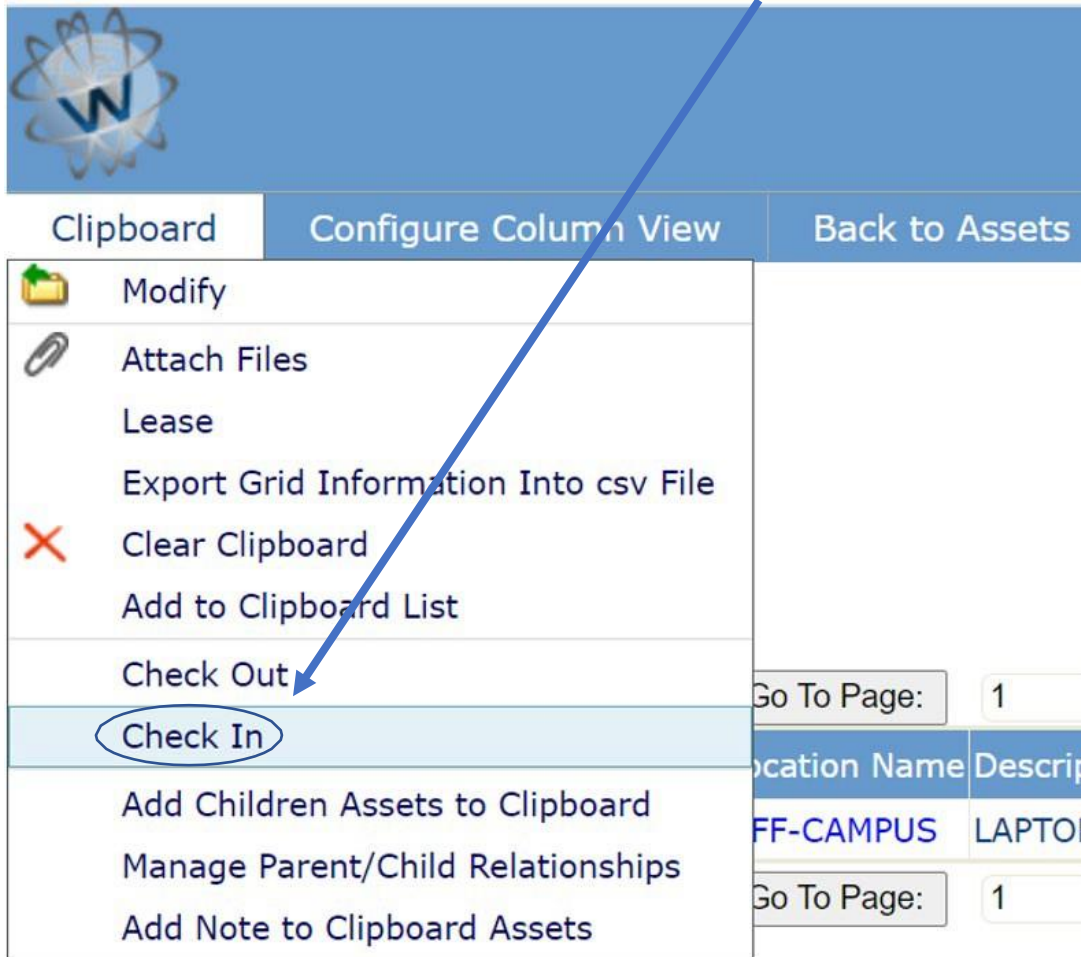


15. Review the Colum View to ensure the item is checked out to the correct employee. This completes the Checked Out process.

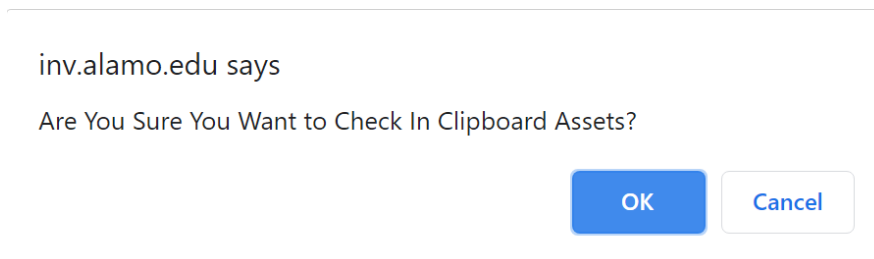


Check-In an item

1. Follow steps 1-6 in the above section.
2. Hover over the **Clipboard** tab and Scroll down to the **Check In** feature. Click on this option.



3. Click **OK** when this box pops up



4. Click **OK**



inv.alamo.edu says

Assets were Successfully Checked In.

OK

5. Review the Colum View to ensure the item has been checked in.



How to View a Department Inventory Report in Wise Track Web

Please only use Google Chrome, Firefox or Safari to access Wise Track Web.

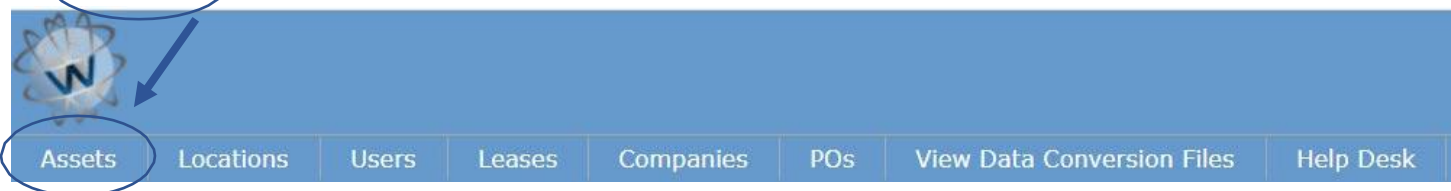
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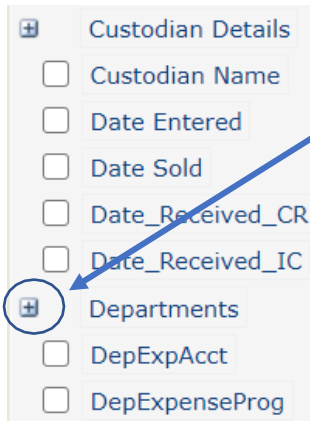
If you have changed your password and forgotten it, you may contact Inventory Control for reset at dst-TeamInventory@alamo.edu

1. In the top, left corner on the WiseStart Barcode Search start up screen, Click on the

Assets' Tab.



2. Click on the red highlighted **'Search Assets'** script
3. A pop-up box will appear prompting a list of search options. These options are in alphabetical order. Scroll down to the **'Departments'** option and Click on the '+' symbol to expand this selection



See next page for additional instructions



4. Click the box to enter a check mark next to 'Name'. The Search Criteria box will expand.

Search Assets

- Condition
- Contact_Person
- Container Movement
- Custodian Details
- Custodian Name
- Date Entered
- Date Sold
- Date_Received_CR
- Date_Received_IC
- Departments
 - Branch
 - Business Unit
 - Department Code
 - Description
 - Name
 - Organization

Please Enter Search Criteria for Name

- Contains
- Equals
- Starts With
- not Equals
- Empty (Null)
- not Empty (not Null)
- Multiple

5. Type the Department FOAP into the field. Click the dropdown arrow and select the Department needed for review. (Multiple departments may also be viewed by selecting the Multiple radio button) After highlighting the department, Click the Search Assets option. This is how the view should look:

Close

Search Assets

- Condition
- Contact_Person
- Container Movement
- Custodian Details
- Custodian Name
- Date Entered
- Date Sold
- Date_Received_CR
- Date_Received_IC
- Departments

Please Enter Search Criteria for Name

- Contains
- Equals
- Starts With
- not Equals
- Empty (Null)
- not Empty (not Null)
- Multiple

899999:TEST

899999:TEST

See next page for additional instructions



6. A list of Department assets will populate. Type 200 in the Assets per page #: field to view large inventory data.

Assets per page#: Column View: Assets Found: 8
Page: 1 out of 1 Assets in Clipboard: 0
Search Criteria: Departments-Name

First Previous Next Last Go To Page:

Selection	Clipboard	Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number
Select Edit	<input type="checkbox"/>	No	TEST	899999:TEST SAC MLC RM 100A - STORAGE	TEST			
Select Edit	<input type="checkbox"/>	No	700001	899999:TEST NO LONGER AT ACCD	DESK	DELL	OPTIPLEX	TEST TAG - SAC OTS
Select Edit	<input type="checkbox"/>	No	700002	899999:TEST SAC MLC RM 719	PRINTER	DELL	COLOR LASER	TEST TAG - SAC OTS
Select Edit	<input type="checkbox"/>	No	700003	899999:TEST SAC MLC RM 719	PROJECTOR	DELL	DLP	TEST TAG - SAC OTS
Select Edit	<input type="checkbox"/>	No	700004	899999:TEST SAC FAC RM 305H	COMPUTER	DELL	OPTIPLEX	TEST TAG - SAC OTS
Select Edit	<input type="checkbox"/>	Yes	700005	899999:TEST SAC FAC RM 305H	PROJECTOR	DELL	PROJECTOR	TEST TAG - SAC OTS
Select Edit	<input type="checkbox"/>	No	700006	899999:TEST SAC FAC RM 305H	LAPTOP	DELL	LATITUDE 14	TEST TAG - SAC OTS
Select Edit	<input type="checkbox"/>	Yes	138895	899999:TEST DSO CU 300.65	COMPUTER	DELL	OPTIPLEX	5GQTG42

First Previous Next Last Go To Page:

7. Click on the Assets tab; Scroll down to Export Grid Information into .csv file and Click on the selection.

The screenshot shows the 'Assets' menu with the following options: Search Assets, Quick Search, Refresh, Add, Duplicate, View/Modify, Delete Selected Asset, **Export Grid Information into csv File** (highlighted), Export Appgen Application, Logged Transactions, Add Note to Selected Asset, Add Note to Clipboard Assets, Notes, Attach Files to Selected Asset, View attached Files, Check Out, Check In, Asset Lease Information, Additional POs, Additional Invoices, Manage Parent/Child Relationships, Maintenance, Computer Configuration, Dashboard, and Requests/Reservations. The background shows the asset list table from the previous step.



How to Configure a Grid Column View in Wise Track Web

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1. At the start up screen, you will see the WiseStart Barcode Search screen. Enter the tag number(s) for property in the left search box. (Press 'Enter' after each number entered for multiple entries)
2. Click on 'Verify'; Wise Track will populate active tag numbers in the next window on the right side.
3. Click on 'View Found Assets' button, bottom right. You will be directed to the Asset screen. The initial log in Column View for users will appear like the screenshot below

First	Previous	Next	Last	Go To Page:	1			
Selection	Clipboard		Bar Code	Description	Model Name	Model#	Serial Number	
Select Edit	<input type="checkbox"/>		Yes	433200	TABLET	ELITE X2	N/A	5CG8250FC2
First	Previous	Next	Last	Go To Page:	1			

4. Hover the cursor over 'Setup' and use the dropdown feature to Click on 'Configure Column View (Assets info will be refreshed)' Here is what you should see:

The 'Configure Column View For Assets' pop-up window will appear.

See next page for additional instructions



- Select and drag field boxes located in the left 'Available Fields' screen into the right 'Fields in Data Grid' screen. Fields are in alphabetical order.

Configure Column View For Assets

Save and Close Cancel

Select and drag fields to display in your data grid.
Ctrl1 + Click to select multiple items.

Available Fields

- Checked Out
- Checked Out To
- Children
- Custodian
- Location Name
- Custodian Full Name
- Date Entered
- Departments
- FundingOrgnCode
- Grant_Nbr
- In-Service Date
- Last Inventoried Date
- Location_Address1
- Location_Address2
- Location_Area
- Location_Branch
- Location_Building
- Location_Campus
- Location_City
- Location_Country

Fields In Data Grid

- Bar Code
- Description
- Model Name
- Model#
- Serial Number

- Add the fields: Asset User Full Name, Checked Out, Checked Out To, Custodian Full Name, Departments, Location Name, Manufacturer Name.
Additional fields may be added/removed, depending on the information you want to view. The field selections maybe moved up/down and will be updated when the 'Save and Close' is applied.
- Click 'Save and Close' to review the updated Column View

Selection	Clipboard	Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number	Purchase Order	Purchase Price	Checked Out	Checked Out To	Asset User Full Name	Asset User	Last Inventoried Date	Custodian Full Name
Select Edit	Yes	433200	893502:DIS-FINANCE AND FISCAL SERVICES DSO	CU 300.65	TABLET	HEWLETT PACKARD ELITE X2	5CG8250FC2	P2000527		\$1,697.00	Yes	McKee,Scott	tester2,inventory	inventory2	09/03/2019	

After a Column View has been applied, it will continue to populate the same information every time the user logs in.



How to Attach Files to Assets in Wise Track

PLEASE NOTE THE FILE YOU WISH TO ATTACH MUST BE A PDF

1. Property Steward or Assistant login to Wise Track <https://wtprod.alamo.edu/wisetrack/>
2. If you have changed your password and forgotten it, you may contact Inventory Control for reset or new access at dst-teaminventory@alamo.edu
3. At the start up screen, you will see Wise Start Barcode Search Screen. Enter the tag(s) number(s) for the property in the left search box.
4. Click on 'verify', if in Wise Track it will populate in the next window on the right side.
5. Click on 'View Found Assets' button, bottom right.
6. Add a check mark at the Clipboard box to select all property or only check the box under clipboard for one item.
7. From the menu tab, select Clipboard, then 'View Assets in Clipboard'.
8. From the menu tab, select Clipboard, then "Attach files"
9. Now you can browse your files and select the one you would like to attach. Also make sure you add a description to the file you are attaching. Most likely you will be attaching a Loaned Property Request Form or LPRF for short.
10. Once you have selected the file you would like to add click "Upload File(s)" at the top left corner.
11. To confirm the files have been attached there will be a message in red at the top of the screen that will say "1 file(s) uploaded". If you uploaded more than one file it will have that number at the front of the message.

If you have questions or need assistance, contact Inventory Control dst-teaminventory@alamo.edu