

"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: <u>https://wtprod.alamo.edu/wisetrack/</u>

For first-time users: Username <u>and</u> 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 <u>dst-TeamInventory@alamo.edu</u>

- 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.
- Add a check mark in the box next to Clipboard to select multiple items to assign to an employee <u>or</u> only check the box next to the item that will be assigned. (See screenshots below)

(Update All Property)

Selection	Clipboard 🗹	Ø	Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Numbe
Select Edit		No	TEST	899999:TEST	SAC MLC RM 100A - STORAGE	TEST			
Select Edit		Yes	138895	893502:DIS-FINANCE AND FISCAL SERVICES	DSO CU 300.65	COMPUTER	DELL	OPTIPLEX	5GQTG42
Select Edit		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 Lo	cation Name		Manufacturer Name	Model Name	Serial Numbe
Select Edit		No	TEST	899999:TEST SA	AC MLC RM 100A - STORAGE	TEST			
Select Edit		Yes	138895	893502:DIS-FINANCE AND FISCAL SERVICES D	50 CU 300.65	COMPUTER	DELL	OPTIPLEX	5GQTG42
Select Edit		Yes	433200	893502:DIS-FINANCE AND FISCAL SERVICES D	50 CU 300.65	TABLET	HEWLETT PACKARD	ELITE X2	5CG8250FC2

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

Assets	Saved Queries	Cli	pboard	Setup	Wise Navigation	
		ß	View Ass	ets in Clipbo	bard	-`'n'-
1			Export C	lipboard Info	o	du

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



	Cli	pboard	Configure Column View	Back to Assets
	0	Modify		
dm	0	Attach F	iles	

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:

Submit	Close	Select Fields to mo	modify Field Layouts				
				Save F	ield Layout		
Transfor	Dog Data:	[🙀 Select	Field Layout		
CUSTO	DDIAL CHAN	IGE - INITIATE A TRANS	FER OF	PROPERTY	Global Field Layout	•	
CUSTO	DDIAL RECE	IPT - ACCEPT A TRANSF	ER OF	PROPERTY	e Field Layout		
CUSTO	DDIAL UPDA	TE TO LOCATION - VERI	FY MOI	NTHLY			
DRP M	AINTENAN	CE			Pamela 💌 🧨		
R	NAME - ASS	SIGN ASSET TO EMPLOY	EE				

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.

Modify Clipboard Assets								
Submit Close	Select Fields to modify	Field Layouts						
Asset User Name:	test, test (test)	• 🔎	Update Notes					
*Location:	DSO CU 300.65	▼	information entered into the fields will be assigned to all 1 assets in					
			the clipboard list:					

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



IMPORTANT Locations are pre-populated. If you <u>do not</u> 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 <u>Updating the Column View in Wise Track Web</u> for more information.



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

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- 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 <u>or</u> only check the box next to the item that needs to be transferred. (See screenshots below)

(Update All Property)

Selection	Clipboard 🗹	Ø	Bar Code	Departments I	ocation Name	Description	Manufacturer Name	Model Name	Serial Numbe
Select Edit		No	TEST	899999:TEST 5	AC MLC RM 100A - STORAGE	TEST			
Select Edit		Yes	138895	893502:DIS-FINANCE AND FISCAL SERVICES	SO CU 300.65	COMPUTER	DELL	OPTIPLEX	5GQTG42
Select Edit		Yes	433200	893502:DIS-FINANCE AND FISCAL SERVICES	SO CU 300.65	TABLET	HEWLETT PACKARD	ELITE X2	5CG8250FC2

Or

(Update Single Item)

Selection	Clipboard		Bar Code	Departments	ocation Name	Description	Manufacturer Name	Model Name	Serial Numbe
Select Edit		No	TEST	899999:TEST 5	SAC MLC RM 100A - STORAGE	TEST			
Select Edit		Yes	138895	893502:DIS-FINANCE AND FISCAL SERVICES	DSO CU 300.65	COMPUTER	DELL	OPTIPLEX	5GQTG42
Select Edit		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'.

Assets	Saved Queries	Cli	pboard	Setup	Wise Navigation
		ß	View Ass	ets in Clipb	oard
10			Export C	lipboard Info	0

- 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'.

	Cli	pboard	Configure Column View	Back to Assets
	2	Modify		
հղ	0	Attach Fi	les	



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:

Submit	Close	Select Fields to modify	Fie	eld Layo	uts	
				Save F	ield Layout	
Transfor	Rog Data:		- 2	Select	Field Layout	
	DDIAL CHAN	PERTY	Global Field Layout	•		
CUSTO	DDIAL RECE	PERTY	e Field Layout			
CUSTO	DDIAL UPDA					
DRP M	AINTENAN	Pameia 🔻 🧨				
USER	NAME - ASS	SIGN ASSET TO EMPLOYEE				

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

Transfer_Req_Date:	05/07/2020	Ë	

- **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; <u>you must "uncheck" this box</u> 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:

	×				
Add Department					
Add Department Clear Other Departments					
TRANSFER REQUEST					
Select Departments					
Cancel Submit					
AssociateName	Description				
810003:SAC-OFFICE OF THE PRESIDENT	SAC-OFFICE OF THE PRESI				
810020:SAC-INSTITUTIONAL ADVANCEMENT	SAC INSTITUTIONAL ADVA				
810103:SAC-COLLEGE AND GRANTS DEVELOPMENT	SAC-COLLEGE AND GRANTS				



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

Departments: 893502:DIS-FINANCE AND FISCAL SERVICES,TRANSFER

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

O Contains	899999		ð
○ Equals			
Starts With			
○ not Equals			
O not Empty (not	Null)		

16. Click the magnifying glass to populate the selected department

Select Custodian Name Contains 899999:TEST, TEST(898989) Equals 899999:TEST, TEST(898989) Starts With not Equals not Equals not Empty (not Null)		
 Contains Equals Starts With not Equals not Empty (not Null) 899999:TEST, TEST(898989) 899999:TEST, TEST(898989) 	Sele	ct Custodian Name
*	 Contains Equals Starts With not Equals not Empty (not Null) 	8999999:TEST, TEST(898989)



INVENTORY CONTROL DEPARTMENT 2222 N. Alamo St. San Antonio, TX 78215

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

Custodian Name: 8999999:TEST, TEST(898989)	-	P
--	---	---

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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- 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 <u>or</u> only check the box next to the item that needs to be accepted. (See screenshots below)

(Update All Property)

Selection	Clipboard 🗹		Bar Code	Departments I	ocation Name	Description	Manufacturer Name	Model Name	Serial Numbe
Select Edit		No	TEST	899999:TEST 5	AC MLC RM 100A - STORAGE	TEST			
Select Edit		Yes	138895	893502:DIS-FINANCE AND FISCAL SERVICES	SO CU 300.65	COMPUTER	DELL	OPTIPLEX	5GQTG42
Select Edit		Yes	433200	893502:DIS-FINANCE AND FISCAL SERVICES I	SO CU 300.65	TABLET	HEWLETT PACKARD	ELITE X2	5CG8250FC2

Or

(Update Single Item)

First Previous Next Last Go To Page: 1									
Selection	Clipboard 🗌		Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number
Select Edit		No	TEST	899999:TEST	SAC MLC RM 100A - STORAGE	TEST			
Select Edit		Yes	138895	893502:DIS-FINANCE AND FISCAL SERVICES	DSO CU 300.65	COMPUTER	DELL	OPTIPLEX	5GQTG42
Select Edit		Yes	<mark>s</mark> 433200	893502:DIS-FINANCE AND FISCAL SERVICES	DSO CU 300.65	TABLET	HEWLETT PACKARD	ELITE X2	5CG8250FC2
First Previo	us Next La	ast	Go To Pa	ige: 1					

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

Assets	Saved Queries	Cli	pboard	Setup	Wise Navigation	
		ß	View Ass	ets in Clipbo	pard	2
2.1			Export C	lipboard Info	o	9

- 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'.



	Cli	pboard	Configure Column View	Back to Assets
	0	Modify		
elm)	0	Attach Fi	les	

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:

L.								
	Submit	Close	Select Fields to modify	Fie	eld Layo	uts		
ſ			Save F	ïeld Layout				
	Transfor	Rog Data:		14 5	Select	Field Layout		
i	CUST	DDIAL CHAN	NGE - INITIATE A TRANSFER C)F PRO	PERTY	Global Field	Layout	•
		DDIAL RECE	IPT - ACCEPT A TRANSFER OF	F PROF	PERTY	e Field Layo	ut	
	CUST	DDIAL UPDA	TE TO LOCATION - VERIFY M	ONTHE	Y		0	
l	DRP M	AINTENAN	CE			Pamela 🔻	<i>•</i>	
	USER	NAME - ASS	SIGN ASSET TO EMPLOYEE					
ar i						-		

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

Departments:	TRANSFER REQUEST,893502:DIS-FINANCE AND FISCAL :
) E	



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; <u>you must "leave this box checked"</u> in order to remove the transfer affiliation.

Your view should look like this:

	×							
	Add Department							
Add Dep	artment 🗹 Clear Other Departments							
899999:TE	899999:TEST							
Select Departments								
Cancel	Submit							
Associate	Name	Description						
	810003:SAC-OFFICE OF THE PRESIDENT	SAC-OFFICE OF THE						
	810021: SAC-BUDGET OFFICE	SAC-BUDGET OFFICE						
	810103:SAC-COLLEGE AND GRANTS DEVELOPMENT	SAC-COLLEGE AND (
	810105:SAC-DIVERSITY EQUITY AND INCLUSIVE EXCELLENCE	SAC-DIVERSITY EQU						
	810501:SAC-PUBLIC INFORMATION	SAC PUBLIC INFORM						
	811001:SAC-VP FOR ACADEMIC SUCCESS	SAC VICE PRESIDEN						
	811002:SAC-DUAL CREDIT	SAC-DUAL CREDIT						
12345	678910							

- 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:

Departments: 899999:TEST

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.

*Location:	SAC MLC RM 102	\mathbf{P}

IMPORTANT Locations are pre-populated. If you <u>do not</u> 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.





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.
- Add a check mark in the box next to Clipboard to select multiple items to assign to an employee <u>or</u> only check the box next to the item that will be assigned. (See screenshots below)

(Update All Property)

Selection	Clipboard 🗹	Ø	Bar Code	Departments Loc	ation Name	Description	Manufacturer Name	Model Name	Serial Numbe
Select Edit	t 🔽	No	TEST	899999:TEST SAG	MLC RM 100A - STORAGE	TEST			
Select Edit	t 🔽	Yes	138895	893502:DIS-FINANCE AND FISCAL SERVICES DSC	CU 300.65	COMPUTER	DELL	OPTIPLEX	5GQTG42
Select Edit		Yes	433200	893502:DIS-FINANCE AND FISCAL SERVICES DS0	CU 300.65	TABLET	HEWLETT PACKARD	ELITE X2	5CG8250FC2

Or

(Update Single Item)

First Previo	us Next	Last	Go To Pa	age: 1					
Selection	Clipboard		Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number
Select Edit		No	TEST	899999:TEST	SAC MLC RM 100A - STORAGE	TEST			
Select Edit		Yes	138895	893502:DIS-FINANCE AND FISCAL SERVICES	DSO CU 300.65	COMPUTER	DELL	OPTIPLEX	5GQTG42
Select Edit		Yes	433200	893502:DIS-FINANCE AND FISCAL SERVICES	DSO CU 300.65	TABLET	HEWLETT PACKARD	ELITE X2	5CG8250FC2
First Previo	us Next	Last	Go To Pa	age: 1					

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

Assets	Saved Queries	CI	lpboard	Setup	Wise Navigation	
		B	View As	sets in Clipbe	oard	-ìr
			Export C	lipboard Info	0	6

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



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

Sin S					Clipboard As	set List (wisetrack	_prod)
Clipboard	Configure Column View	Back to As	sets					
Di Modify								
Attach Lease Export Clear C Add to Check (Files Grid Information Into csurfile lipboard Clipboard Lite	Go To Page: 1						
Check	m	cation Name	Description	Manufacturer Name	Model Name Serial Number	Checked Ou	t Checked Out To	Asset User Full Nam
Add Ch	ildren Assets to Clipboard	AC FAC RM 305	LAPTOP	DELL	LATITUDE 14 TEST TAG - SAC	OTS		
Manage Add No	e Parent/Child Relationships te to Clipboard Assets	Go To Page: 1						

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.

		x					
Check Out Clipboard Assets							
Close Submit							
*Checked Out To:	Mic Adden, Michael (mmcadden)						
Due Date:	Mc Adden, Michael (mmcadden)						
Due Date.	Mc Ardle, Nathan (nmcardle)						
Location:	Mc Auliffe-Killian, Erin (emcauliffe)						
Notes:	Mc Cabe, Martha (mmccabe1)						
	Mc Call, Kenneth (kmccall)						

- **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.

-			ے								
	Check Out Clipboard Assets										
	Close Submit										
	*Checked Out To:	Mc Adden, Michael (mmcadden)									
1 100	Due Date:	August 31 2021									
	Location:	OFF-CAMPUS ▼									
	Notes:										



- 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

inv.alamo.edu says	
Asset(s) Checked Out#: 1	
	ОК

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

inv.alamo.edu says Print Receipt?		
	ок	Cancel

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.

S.				
Cli	pboard	Configure Column View	Back to	Assets
1	Modify			
Ø	Attach Fi	les		
	Lease			
	Export G	rid Information Into csv File		
×	Clear Clip	oboard		
	Add to C	lipboard List		
	Check Ou	ut	Go To Page:	1
	Check In	\rangle	cation Name	Descrir
	Add Child	dren Assets to Clipboard		
	Manage I	Parent/Child Relationships		LAFTOR
	Add Note	e to Clipboard Assets	50 10 Page:	1

3. Click OK when this box pops up

inv.alamo.edu says		
Are You Sure You Want to Check In Clipboard As	ssets?	
	ОК	Cancel

4. Click OK



inv.alamo.edu says Assets were Successfully Checked In.

ОК

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



How to View a Department Inventory Report in Wise Track Web

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

4	SN.	1						
	Assets	Locations	Users	Leases	Companies	POs	View Data Conversion Files	Help Desk

- 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



- Date Sold
- Date_Received_CR
- Date_Received_IC
-) Departments
- DepExpAcct
 - DepExpenseProg



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



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:

	Condition	*	Please Enter Search Criteria	a for Name	
	Contact_Person		Contains	899999:TEST	
ŧ	Container Movement				
ŧ	Custodian Details		Starts With	899999:TEST	
	Custodian Name		O not Equals		
	Date Entered		O Empty (Null)		
	Date Sold	_	O not Empty (not Null)		
	Date_Received_CR		OMultiple		
	Date_Received_IC				
3	Departments				



INVENTORY CONTROL DEPARTMENT 2222 N. Alamo St. San Antonio, TX 78215

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

Assets per page#: 200 Column View: Page: 1 out of 1					Asse Asse Sear	ts Found: 8 ts in Clipboar ch Criteria: D	d: 0 epartments-Name		
First Previo	ous Next La	st	Go To Pa	ge: 1					
Selection	Clipboard	Ø	Bar Code	Departments	Location Name	Description	Manufacturer Name	Model Name	Serial Number
Select Edit	t 🗌	No	TEST	899999:TEST	SAC MLC RM 100A - STORA	GE TEST	h.		
Select Edit	t 🗌	No	700001	899999:TEST	NO LONGER AT ACCD	DESK	DELL	OPTIPLEX	TEST TAG - SAC OTS
Select Edit	t 🗌	No	700002	899999:TEST	SAC MLC RM 719	PRINTER	DELL	COLOR LASER	TEST TAG - SAC OTS
Select Edit	t 🗌	<u>No</u>	700003	899999:TEST	SAC MLC RM 719	PROJECTOR	DELL	DLP	TEST TAG - SAC OTS
Select Edit	t 🗌	No	700004	899999:TEST	SAC FAC RM 305H	COMPUTER	DELL	OPTIPLEX	TEST TAG - SAC OTS
Select Edit	t 🗌	Yes	700005	899999:TEST	SAC FAC RM 305H	PROJECTOR	DELL	PROJECTOR	TEST TAG - SAC OTS
Select Edit	t 🗌	No	700006	899999:TEST	SAC FAC RM 305H	LAPTOP	DELL	LATITUDE 14	TEST TAG - SAC OTS
Select Edit	t 🗌	Yes	138895	899999:TEST	DSO CU 300.65	COMPUTER	DELL	OPTIPLEX	5GQTG42
First Previo	ous Next La	st	Go To Pa	ge: 1	550 00 500.05	CONFUTER	VLL	OF THEER	5001042

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

As	sets	Saved Queries	Clipboard	Setup	Wise Navigation	on		
	Sear Quic Refre Add	ch Assets k Search esh		Query abov	e.			
×	View	/Modify te Selected Asset	-	N:		Assets Found: 8 Assets in Clipboar Search Criteria: D	d: 0 epartments-N	lame
	Expo	rt Grid Information into	csv File					
	Expo	ad Transactions		L.				CONTRACTOR OF
Ð	Add Add Note	Note to Selected Asset Note to Clipboard Asset	5	9:TEST SAC 9:TEST NO I 9:TEST SAC	MLC RM 100A - ST LONGER AT ACCD MLC RM 719	TORAGE TEST DESK PRINTER	DELL	
00	Attao View	ch Files to Selected Asse attached Files	:t	9:TEST SAC 9:TEST SAC	MLC RM 719 FAC RM 305H	PROJECTOR COMPUTER	DELL	
	Chec Chec	k Out k In		9:TEST SAC	FAC RM 305H FAC RM 305H	PROJECTOR	DELL	
1	Asse Addit Addit	t Lease Information tional POs tional Invoices		1	00 300.65	COMPUTER	DELL	
it S	Mana Main	age Parent/Child Relation tenance	nships •	ormation [Duplicate			
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How to Configure a Grid Column View 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: <u>https://wtprod.alamo.edu/wisetrack/</u>

For first-time users: Username <u>and</u> 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 <u>dst-TeamInventory@alamo.edu</u>

- 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 🗌	Ø	Bar Code	Description	Model Name	Model#	Serial Number	
Select Edit		Yes	433200	TABLET	ELITE X2	N/A	5CG8250FC2	
First Previo	us Next La	st (Go To Pa	ge: 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:

S N				
Assets	Saved Queries	Clipboard	Setu	up Wise Navigation
				Configure Column View (Asset info will be refreshed)
Y To Start: Search Assets or Select a Saved			S S	Save Column View Select Column View from the Saved Views List
▲ To WiseStart		S R	Select Column View from the Global Views List • Remove Column View from the Saved Views List	
Assets Page: 1	per page#: 20 1 out of 1	Column Viev	v:	Assets Found: 1 Assets in Clipboard: 0 Search Criteria: Quick Search

The 'Configure Column View For Assets' pop-up window will appear. *See next page for additional instructions*



5. 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 Colum	n View For	Assets			
Save and Close	Cancel				
Select and drag fiel Ctrl + Click to sel	ds to display i ect multiple it	in your data grid. ems. Available Fields		Fields In Data Grid	
		Checked Out To	-	Bar Code	
		Children		scription	
		Custodian		Model Name	
		Custodian		Model#	
		Location Name		Serial Number	
		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			
				4	× .
	•				P

6. 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.

7. Click 'Save and Close' to review the updated Column View

First Previous Next Last Co To Page 1 Selection (clipboard 2) 2 per Code Departments Last Two Code Departments Last Inventored Date Selection Name Description Manufacturer Name Model Name Serial Number Purchase Order Purchase Order Purchase Order Out Checked Out Checked

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 <u>dst-teamInventory@alamo.edu</u>
- 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 From 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