

Hands-On BassetPro

Asset Verification Procedure

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1. Step by Step Asset Verification: On the PC
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2. Sample Location Hierarchy

What to do to get started: ON YOUR PC

1. To install BassetPro program on your PC.

2. Follow these steps:

Insert BassetPro CD provided to install in your CD ROM.

The Cd should start automatically, if it doesn't, go to your Windows Start Menu (bottom left of screen), select RUN and click BROWSE to select the path to the install program on your BassetPro CD.

Once you have select the install program the program will start to load. It might ask you about changes to your system configuration select CONTINUE. Follow the instructions as prompted.

When setup is complete, click on OK.

Double click on the BassetPro icon to start the program.

3. From the menu on top, select Setup Network and enter the path to your data. (If you are not putting your data on a network you can skip this step.)

4. This is the path to your server. If you have difficulties consult your IT expert immediately.

5. To start BassetPro in the future, go to Start and cursor up to Programs to BassetPro. You can also have your IT expert create an icon for you on your desktop.

6. Always EXIT BassetPro properly, by going to the File menu, cursor down to EXIT and clicking on OK.

What to do to get started: ON YOUR WORKABOUT

1. Open your Workabout and put in your data disk in the top slot, and the BassetPro program disk (128k) in the bottom slot as you look at the Workabout with the screen and keyboard facing you.

2. Turn your Workabout on, then press these three keys simultaneously **☐+CTRL+DEL**. This will re-start your Workabout and load the BassetPro program.

NOTE: the ☐☐ key is called the Psion key and is the larger key on the lower left part of the keyboard. If the unit does not respond call me at 613-225-4905 ext. 212 and I can walk you through this stage.

Once BassetPro has been loaded on the Workabout, you should never have to re-boot or re-load it. If you ever see the large PSION logo, then just press ENTER.

3. It is **VERY IMPORTANT** to make sure your date and time are set correctly on both your PC and Handheld. A good habit to get into is when ever you turn on your handheld look on the bottom of the screen and check the date and time. If you notice it is set incorrectly go to **HELP SET DATE/TIME** and following the instructions. **NOTE:** The handheld works on a 24 hour clock.

Step by Step Asset Verification: On your Handheld

TIP: Decide before you begin setting up locations, manufacturers, models, etc. how you would like the information to appear in BassetPro. This is especially true when there will be more than one user. This will avoid someone using all capitals and someone else using upper and lower case.

Setting up a new location (room)

1. Choose Audit, under the Action menu, and press ENTER. Attach bar code label to the door frame or light switch of the room you would like to identify.

TIP: Alternatively you could have a master binder with sheet protectors in it. This is a good idea if you are afraid of someone picking your location bar codes off. Stick the bar codes on the sheet protector and then put paper with the location descriptions written on them in the sheet protectors.

2. Scan this bar code label. Press ENTER to ADD. Press 'L' to choose Location.
3. Enter pertinent information identifying the room as instructed on Workabout screen. End this sequence by pressing ENTER. *The code function is for short codes which are currently inactive. It is not necessary to put any information in this field.
4. If you make a mistake or want to edit the location description Press ENTER and edit the description accordingly.

Setting up a New Asset

1. apply bar code label onto the asset
2. scan the bar code Label (the Workabout should say: bar code not found)
3. press the **ENTER** key to add it.
4. press **A** for Asset.
5. enter in the pertinent details (remember Model, Manufacturer and Owner are pop-up menus and you must press the MENU key to choose from these menus).
6. When finished with this record, press **ESC** and then **ENTER** to save it.

NOTE: when you enter the asset s description a screen may pop up that has the description in the code and description field. This is because BassetPro has never seen this description before. The code field is for a short code you may want to set up and the description field is for the description you want to appear when you type the short code in the description field in the future. For example: If you have the description colour laser printer and you don t want to type that ever time you add a printer to BassetPro you could set up a short code of CLP. In the future ever time you want add a colour laser printer to your database simply type CLP in the description field, Press **ENTER**, and colour laser printer will automatically appear in the description field.

TIP: While in the pop-up menus you can scroll down quickly by pressing the first letter of the word your looking for ie: If you were looking for Hewlett Packard you can press **H** , this will take you to the beginning of the **H** s . Continue entering the rest of the model or manufacturer s name until you find the item your looking for or you get a screen that says **Not Found** , Press **ENTER** to Add or **ESC** to Ignore this function.

TIP: Many manufacturer s are now barcoding their serial numbers. If you have a serial number that is a bar code you can Press the menu key and then scan it instead of entering the number and leaving room for human error. Please call me at (613) 225-4905 X212 for further assistance.

Associating a New Bar code to an Existing Asset

You can assign as many bar codes as you want to an item in your BassetPro database. This can be done by associating a new bar code to a bar code you have previously assigned to an asset. This is especially recommended as a time saving tip if you have people within your organization who think it is fun to pick bar codes off equipment.

1. In the **Action Menu** select **Audit**. Scan your desired Location bar code.
2. Scan the new bar code you have placed on the asset. (The system will tell you it is not found.)
3. **Press Space** (located on the bottom of the handheld s keyboard.)
4. You will then be prompted to enter a clue. Type to bar code number that is presently attached to asset and **Press ENTER**.
5. The information for that asset will then appear on screen. If this is the asset you want to associate to **Press Y** for yes.
6. Once you have associated a new bar code to an item you can scan either bar code and the asset s information will appear.

TIP: If someone has already picked your existing bar code off you could follow to steps above, but when you are entering the clue, type the asset s serial number and set the type of clue as serial number.

Changing Location of Assets or Moving from Room to Room

When performing an audit or adding new assets and you go to another room, scan the room bar code BEFORE you scan in any assets in this new location.

If you have scanned a number of assets and you realize you forgot to change location, simply Key in or Scan the room bar code for the room you are currently in, rescan the assets and respond to the "move asset to location" by pressing ENTER to Move.

NOTE: you will also see the move screen if the asset you are scanning has moved to a new location since the last time you performed an inventory.

Editing Details on an Asset

In **AUDIT** mode, you can edit details on an asset by scanning the asset bar code; pressing **ENTER** and changing the desired information. On completion press **ESC** and **ENTER** to save your changes.

Viewing Details of an Asset

In the **Action** menu by selecting **View** you can view all the information you have inputted in the Audit screen plus the last date and time the asset was inventoried and the last location it was audited in. This feature can be helpful when you scan an item and the handheld asks you if you want to move it or if you find a piece of equipment in a location you know it doesn't belong in. To view an item scan or key in the bar code for the asset you wish to view.

Writing and Viewing Notes an Asset

Notes are a great way to track maintenance and other pertinent information about an asset in your database. You can attach as many notes as you want to an asset in your database. Each note can be up to 100 characters.

1. In the **Action Menu** select **Notes**.
2. **Scan** or key in the **Asset** bar code you want to write a note about.
3. Press **ENTER** and type the note. To **View** notes previously written Press **TAB** (located to the left of the up arrow on the keyboard).
4. Once you are done typing your note Press **ENTER** to **Save** and **ESC** to **Cancel** the note.

Data Transfer

1. On the Handheld: go to **File Communications Mode**. The screen will say Workabout is ready for transfer. On the PC: Choose **File Transfer Upload data FROM Handheld** then select **Execute**. Once the transfer is complete the PC will give you an overview of what was received. **NOTE:** Make sure you have either connected your Comms cable to your Handheld before performing this step.
2. The next step is to format your data disk. On the Handheld, go to **Help Format Data Disk** and Press **Y** for yes. This will Erase all the data that was on you data disk so it is a good idea to confirm that you transfer was successful before performing this step.
3. Now that you data is on the PC and is neatly organized and compacted you can transfer it back down to your Handheld. On the Handheld: go to **File**

Communication Mode. On the PC: go to **File Transfer Download Data TO the Handheld** then select **Execute**. Depending on the number of assets you have this part could take some time.

Step by Step Asset Verification: ON YOUR PC

Set up a New Asset and Edit Existing Assets

To setup new assets on your PC go to **Setup Asset** and type in the new bar code. Enter all the pertinent information for that asset. If there is information that is not in the pop up menus on this screen click the little to the left of the field name and add the required information. Once you have completed entering information click **Save/Exit** or **Save/Next**.

NOTE: If you click **Exit** you will not save any information you entered.

To edit an asset that already exists in your database enter the bar code and **Press ENTER**. The information for the asset will appear on the screen. Once you have completed editing the information click **Save/Exit** or **Save/Next**.

Cloning an Asset

Sometimes you might purchase equipment in bulk (ie: 20 monitors the same.) To avoid redundancy BassetPro has a clone feature where you can add the information once then clone it for the remaining items.

To clone items in BassetPro go to **Setup Asset** enter the information for the first item then click the **Clone Asset** button in the top right corner of the screen. In this screen enter the bar code for the next item and **Press Enter**. The cursor will automatically go to the serial number field then to **Save/Next**.

Manufacturer, Model, Class, Short Code and Supplier

To **Add, Edit** or **Delete** the information in these fields go to the **Setup Menu** and select the appropriate field. A list of the information already in your database will appear along with an **Add, Edit** and **Delete** button. Select the desired function and perform the task.

Associating to an Existing Asset

As on the handheld you can associate a new bar code to an existing asset bar code within your database.

1. Under the **Action Menu** select **Associate**.
2. Type the new bar code and Press **Enter**.
3. Enter a clue in the **Asset Clue** box and click **Find**.
4. Confirm this is the correct asset and click **Associate**.

Disposing and Un-Disposing of Assets

You do not have the capability to delete assets in BassetPro. This is considered a feature by many of our clients because it doesn't matter where you work you will always have thieves, you can however Dispose and Un-dispose of assets.

When you dispose of an asset it will no longer show up on reports, if you key in the number the system will tell you it does not exist. However if you Un-dispose of that asset it will become active again.

To Dispose of an Asset:

1. From the **Action Menu** select **Dispose**.
2. Key in the bar code you wish to dispose of.
3. Confirm the asset is the item you want to dispose of and click **Dispose**.

NOTE: If you are unsure of the bar code for the asset you want to dispose of click **Locate** and select the desired item from the list that is sorted in alphabetical order by description.

To **Un-dispose** of an asset select **Un-dispose** from the **Action Menu** and follow the instructions for dispose.

Setting up a New Location and Editing Existing Locations

If you are using a master binder for your location bar codes you may want to set them up on the PC as the screen is larger and easier to read.

To **Add** a new location, go to **Setup Location** and click **Add**. Enter the pertinent information and click **Save**.

To **Edit** or **Delete** a location click **Find** or **List** and select the appropriate location. Make the necessary changes and click **Save**.

Linking New Locations to Parent Locations.

In order to print customized reports in BassetPro you can establish a hierarchy of locations within your database.

1. Select **Setup Location** and follow the steps for editing an asset.
2. Click the **Find** button in the **Parent Description** portion of the screen.
3. Select the appropriate parent and click **Save**.

NOTE: See the last page of this document for more details.

Reports

You can print, view and export a wide variety of reports in BassetPro. I will outline a few choices below but I like to encourage my clients to experiment and see what they prefer.

1. Choose **View / Asset List**. You can select a variety of reports from this screen depending on how you sort and select by. You can View or choose to print out these reports.
2. By going to **REPORT** of **NEW** Assets and keying in today's date, you can view or print assets that have been added today.

Note: If you are on a network with multiple BassetPro users this report will give you a list of everyone's new assets, so it might be longer than you expect it to be.

3. Selecting **Missing Assets** from the **Report Menu** will give you a report of all assets in your database that have not been audited since the specified date. For example: If I started my inventory two weeks ago and want to know what I didn't scan, or missed, I would enter the date two weeks ago and print the report. I would receive a list of everything I missed. I could then go back to the last location the assets were inventoried and find them.

Conclusion

These sheets were designed to give the end user a step-by-step approach to BassetPro. If there is a function that is not in these sheets or you require further assistance, do not hesitate to contact Nancy Tervo by:

e-mail (nt@sage.ca), voice (613-225-4905 X212), or, fax (613-225-8664)

Sample Hierarchy of Locations

