

overview

Issuetrak's Asset Management module allows you to enter, track, and manage records as assets and associate them to issues for reporting purposes.

glossary of terms

- **Asset** – A record of an item, thing, or entity with value to an organization. An asset can be linked to a User, Organization, Department, or Location and can be linked to an issue. Reports can be generated based on the assets themselves or the assets with data from linked issues.
- **TrakPC/ScanPC** – Issuetrak's proprietary application can be used to scan and audit a Windows-based computer and to populate and update PC Assets.
- **PC Asset** – A Windows-based computer record in Issuetrak. PC Assets have specific fields containing information valid to PC records only collected during a ScanPC/TrakPC audit.
- **Non-PC Asset** – Any asset record that does not use the PC specific fields in the asset record. Examples include a non-Windows computer, gym equipment, TV Cameras, medical equipment, or vehicles.

introduction to assets

Within Issuetrak, an issue usually signals that something needs attention. With the Asset Management module, the user can select an item as an asset on the issue, giving you instant visibility on what piece of equipment needs attention. When submitting or editing an issue, links show the details of a selected asset as well as the history of issues tied to that asset.

Supporting Info

Asset: [details](#) | [history](#)

* Class: [add](#)

* Priority: [add](#)

Severity: [add](#) | [descriptions](#)

Each asset record contains fields that define and describe the asset. The primary field is the Asset type value defined by the customer. Asset types determine whether the asset is a PC or Non-PC asset. Once types are defined, assets may be entered into the site through the following methods:

- **Manual Entry** – Added directly into the site one asset at a time.
- **ScanPC/TrakPC** – Automatically add or update PC Assets through the audit process.
- **Data Import** – An import template is available for Non-PC assets only.

Information in the record includes identifiable data such as a serial number, ownership, purchase and lease details, and other information describing the asset. Attachments can be added and notes can be captured to provide additional details. User-defined fields are also available by asset type to handle additional data not included in the standard asset fields. “Availability” options allow an asset to be marked as a loaner and their checkout history captured. Asset fields can be reported on as part of an asset only report or in reports with associated issue information.



A Non-PC asset omits PC specific fields.

| | |
|--|---|
| <p>Asset Nbr: 5 Asset Name: 5558888888 Asset Type: Mobile Phone Asset Status: Assigned</p> <p>Created By: (unknown) on 12/04/2007 2:52PM Modified By: Admin User on 06/10/2015 1:05PM</p> <p>Identification</p> <p>Inventory Nbr: <input type="text" value="A123090993489032"/> Serial Number: <input type="text" value="3452352"/> Barcode Nbr: <input type="text" value="3452352"/> Parent Item: <input type="text"/></p> <p>User Information</p> <p>IssueTrak User: Helen Widget on 06/10/2015 12:58PM Default: Yes details on 03/20/2011 11:28AM details</p> <p>or Other Name: Phone: 234-555-5455 Organization: Widget Makers Inc. Department: Customer Service IssueTrak Locations: IL - Chicago, IL</p> <p>Location</p> <p>Asset Location: <input type="text"/></p> <p>Asset Information</p> <p>Manufacturer: <input type="text" value="Apple"/> Model: <input type="text" value="6"/></p> <p>General Information</p> <p>Phone # : 555-888-8888 ESN Number : Y3209-w0e9 Carrier : AT&T Under Current Contract : Yes</p> <p>Purchase/Lease Information</p> <p>PO: asdf990-0 Vendor: Purchase Date: 06/01/2015 Purchase Price: 500</p> <p>Lease Nbr: Expiration Date: Vendor: Lease Cost: 0</p> <p>Maintenance Nbr: Expiration Date: Vendor: Maintenance Cost: 0</p> <p>Warranty Expires:</p> <p>Availability</p> <p><input type="checkbox"/> Asset may be checked out</p> <p>Comments</p> <p>Installed By: Installed Date: Comments: <input style="width: 100%;" type="text"/></p> | <p>Default Item</p> <p>Active: Yes</p> |
|--|---|



PC assets contain the same information as a Non-PC asset but also additional information collected during the TrakPC/ScanPC audit.

System Information

| Audited | Specified |
|---|-----------|
| Manufacturer: Hewlett-Packard | |
| Model: HP Pavilion dv6 Notebook PC | |
| Computer Name: 2CE2232 | |
| Computer Desc.: | |
| Registered Owner: | |
| Registered Org: Hewlett-Packard | |
| OS: | |
| Audited OS: Windows 7 Professional Build:6.1.7601 SP:Service Pack 1 | |
| Browser: Mozilla Firefox Vers: | |
| Mail Client: Microsoft Outlook Vers:12.0.6691.5000 | |
| Mail Path: | |

Hardware Information

| Audited | Specified |
|--|-----------|
| Memory: 8140 | |
| Processor Count: 1 | |
| Processor Type: Intel(R) Core(TM) i5-2430M CPU @ 2.40GHz () | |
| Processor Mhz: 2401 | |
| Processor Mhz Max: 2401 | |
| Processor Vendor: GenuineIntel | |
| Bios Vendor: Hewlett-Packard | |
| Bios Version: F.1B | |
| Bios Date: 10/23/2012 | |
| Motherboard Manuf: Hewlett-Packard | |
| Motherboard Name: 17F9 | |
| Motherboard Ver: 10.5A | |
| Motherboard Serial: PCKYQ2B2D2Q | |
| Enclosure Vendor: Hewlett-Packard | |
| Enclosure Serial: Chassis Serial Number | |
| Enclosure Tag: System Enclosure 0 | |
| Enclosure Type: Laptop | |
| Display Name: %amd6760.16%;Radeon (TM) HD 7470M | |
| Display Vendor: @oem4.inf,%ati%;Advanced Micro Devices, Inc. | |
| Display Driver: Advanced Micro Devices, Inc. | |
| Display Version: 8.882.2. | |
| Monitor Size: | |
| Nbr of NICs: 2 | |
| Match MAC Addr: | |
| NIC Name (1): {B3E40A16-63C2-4BFD-95 | |
| Description (1): Realtek PCIe GBE Family Controller | |
| MAC Address (1): | |
| IP Address (1): | |
| NIC Name (2): {C3BAE9D3-2797-49F8-99BB | |
| Description (2): Realtek RTL8188CE 802.11b/g/n WiFi Adapter | |
| MAC Address (2): | |
| IP Address (2): | |

| Drives (5) | | | |
|------------|----------------|----------|----------|
| Letter | Type | Size MB | FreeMB |
| C | Fixed | 689361.0 | 588915.0 |
| D | Fixed | 21780.0 | 2347.4 |
| E | Fixed | 4054.0 | 1098.5 |
| F | CD-ROM/DVD-ROM | | |
| G | CD-ROM/DVD-ROM | | |

| Software (106) | |
|----------------------------------|-----------|
| Name | Company |
| 7-Zip 9.20 (x64 edition) | microsoft |
| Size: Installed Date: 03/24/2015 | |
| Adobe Reader XI (11.0.11) | |
| Size: Installed Date: 05/13/2015 | |
| Adobe Shockwave Player 12.1 | |
| Size: Installed Date: 06/10/2012 | |
| AMD Catalyst Install Manager | |
| Size: Installed Date: 11/09/2011 | |
| Blto | |
| Size: Installed Date: 09/19/2012 | |
| Camtasia Studio 8 | |
| Size: Installed Date: 09/19/2012 | |
| Cisco EAP-FAST Module | |

| Processes (124) | |
|------------------|----------|
| Exe | Priority |
| [System Process] | 0 |
| AESTSR64.exe | 0 |
| ALMon.exe | 32 |
| ALSvc.exe | 0 |
| atielcxx.exe | 0 |



additional features

ownership

Assets can be associated with existing Organizations, Departments, and Locations to show where assets are located. You can even assign an asset to a specific user to show ownership of that asset. When an asset is associated to a user, the user's entity values transfer to the asset. This can help your team analyze problems and trends that occur with the assets in your system.

User Information

IssueTrak User: Customer Service Technician on 05/13/2014 10:32AM Default: Yes [details](#)
 Mary Sales on 03/18/2014 2:49PM [details](#)
 on 07/20/2012 11:33AM [details](#)

or Other Name:
 Phone:
 Organization: Parent Company
 Department: Customer Service
 IssueTrak Locations: IL - Chicago, IL

parent/child relationships

Assets can also be linked in a parent/child relationship. This allows you to keep assets stored in the system separately but link them for management purposes. When you look at an asset record, a link at the top right shows related assets. These related assets could be the parent or children of the existing asset, or siblings that share a common parent asset.

View Asset [view related items](#) | [view audits](#) | [view issue history](#)

Asset Nbr: 18
 Asset Name: Atlas DR1
 Asset Type: Drilling Rigs
 Asset Status: In Service

Default Item
 Active: Yes

| Related Items | | | | | |
|---------------|---------|--------------------------|--------|-------------|----------|
| | Asset # | Name | Type | Inventory # | Serial # |
| Child | 46 | Booth 1 | Booth | | |
| Child | 20 | M-123456 | Motors | | M-123456 |
| Child | 22 | P-23456 | Pumps | | |

loaners

Each asset can also be marked with the “available” option. This allows an asset to be marked as a loaner that can be checked out. The availability menu option allows you to see at a glance which assets are available and quickly check out an asset to a specific user with a requested return date. If an asset is currently checked out, you can check it back in, setting the received date. This builds a history for each asset as it leaves and returns.

Asset Availability

Status:

Sort columns by clicking headings

| | Asset # | Asset Name | Checked Out By | Checked Out Date | Req Return Date | |
|-----------|---------|---------------|----------------|------------------|-----------------|---------|
| check out | 94 | 6gjykk1 | | | | history |
| check out | 5 | blackberry1 | | | | history |
| check out | 27 | heatherspc2 | | | | history |
| check out | 8 | projector 123 | | | | history |
| check out | 9 | projector 456 | | | | history |

reporting

There are basically two types of asset reports that can be generated in Issuetrak. The first type only displays asset information and is designed to show information about an asset or filter exclusively on asset details. The second type of report combines issue and asset data and only displays asset data when an issue has been associated to an asset.

asset only reports

Basic asset reporting begins with the Search Assets screen on the Asset Management menu. This allows for detailed searches about specific fields on the asset record. You can search on Non-PC fields by default, or elect to include PC fields.

Search Assets

* asterisks allowed for wildcard search

Asset Nbr:

Asset Name:

Asset Type:

Asset Status:

Include PC Specific Fields in search

Identification

Inventory Nbr:

Serial Nbr:

Barcode Nbr:

User Information

IssueTrak User:

Other Name:

Login Name:

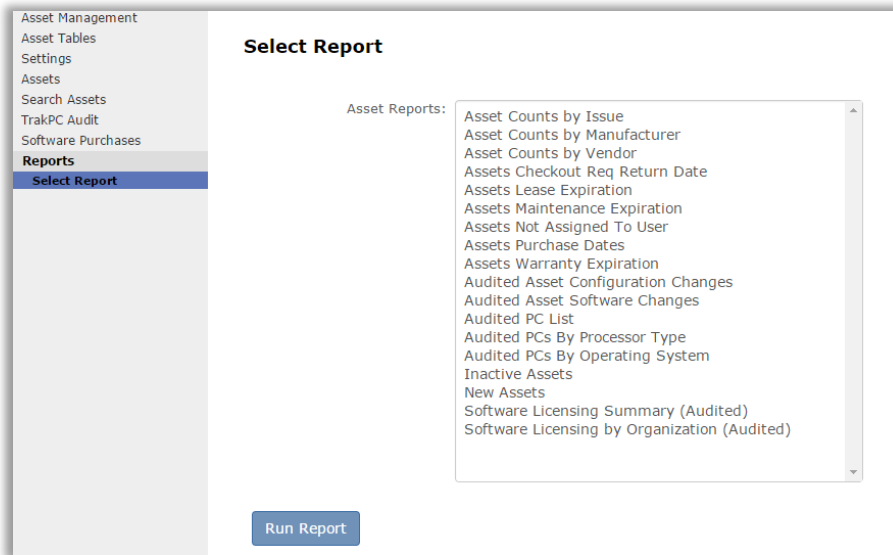
Phone:

Organization:

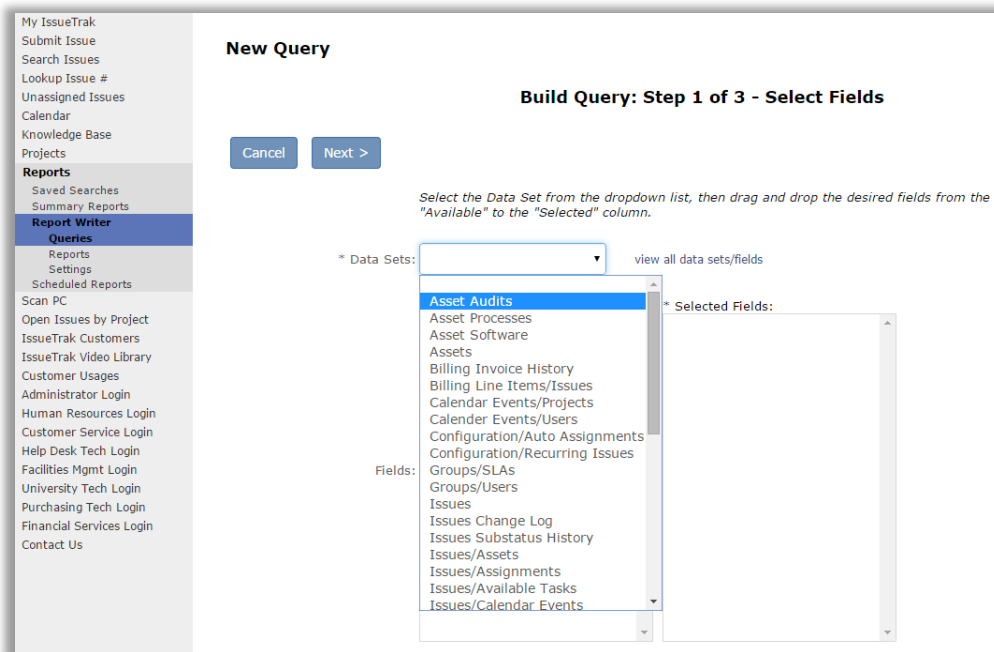
Department:

IssueTrak Locations:

Another in the Asset Management menu is a section of built in reports, such as Lease Expiration, Warranty Expiration, and Software Auditing, along with other counts and summaries.



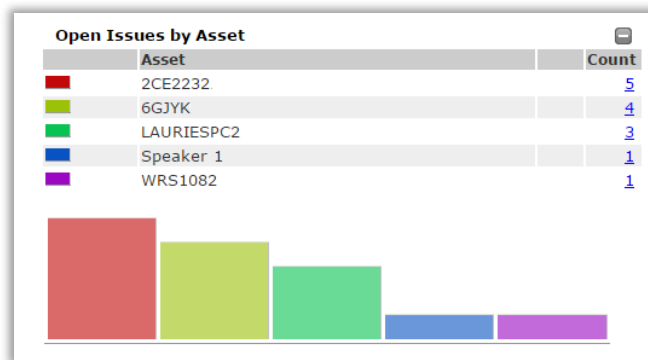
When building a query in the Report Writer, there are several datasets that display only data associated with assets such as audits, processes, and software.



issues and asset reports

These reports display asset data when an asset has been selected on an issue.

On the Dashboard, use the “Open Issues by Asset” panel to see a snapshot of all assets that are associated to open issues.



When building a query in the Report Writer, the Issues/Assets dataset allows the ability to report on asset data with the associated issue data in a single report.

New Query

Build Query: Step 1 of 3 - Select Fields

Cancel Next >

Select the Data Set from the dropdown list, then drag and drop the desired fields from the "Available" to the "Selected" column.

* Data Sets: [Dropdown] view all data sets/fields

Fields:

- Asset Audits
- Asset Processes
- Asset Software
- Assets
- Billing Invoice History
- Billing Line Items/Issues
- Calendar Events/Projects
- Calendar Events/Users
- Configuration/Auto Assignments
- Configuration/Recurring Issues
- Groups/SLAs
- Groups/Users
- Issues
- Issues Change Log
- Issues Substatus History
- Issues/Assets**
- Issues/Assignments
- Issues/Available Tasks
- Issues/Calendar Events

* Selected Fields:

next steps

Many features of the Asset Management module such as Software Purchases, working with Audits, and the TrakPC/ScanPC application have additional documentation available. Check them out or contact us at proservices@issuetrak.com with any questions.