

AUTOMATED INVENTORY SUPPORT SYSTEM

Friendship Public Charter School (FPCS)

User Manual Version 1.0

The mission of Friendship Public Charter School is to provide a world-class education that motivates students to achieve high academic standards, enjoy learning and develop as ethical, literate, well-rounded and self-sufficient citizens who contribute actively to their communities.

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HOME PAGE

The Automated Inventory Support System Home Page for all users and user groups will be the default menu page.

NAVIGATION MENU - MENU BAR

The navigation menu provides the user the ability to navigate thru the FPCS Inventory Web Application. The navigation menu is divided into five different modules. By hovering over the module names, the user is presented with a list of options to select. These modules work as a whole from user administration, Adding Assets, Viewing Assets, Disposal, Custodian, Maintenance and Reports.

MODULES

The FPCS Inventory consists of five modules (see Figure 1.1). These modules are used to navigate thru the application from creating a user account to the asset entry, asset viewing, custodian, maintenance and reports.

Friendship Public Charter School		Auton Defau	nated Inve It	ntory Support Syst	
and the second second second					Welcome
User Administration	Asset Item	Custodian	Maintenance	Reporting	Logout

Figure 1.1 – Five Modules in the Menu Bar

User Administration

- Create User
- Update User
- Change Password
- User Search
- DAL Performance Log
- Create Role

Asset Item

- View Assets
- New Asset
- Mass Assets
- Asset Fields
- Item Disposal
- Item Depreciation
- Transfer
- Scan Asset Items

Custodian

- View Custodians
- New Custodian
- Students Import

Maintenance

- View Categories, Subcategories, Statuses, GL Codes, Vendor Types, Address Types, Contact Types
- Cat-SubCat Mapping
- Import Format
- Field Mappings
- Vendors

Reporting

- Reports
- Parameters
- Columns
- Connection Strings

SCREEN LAYOUT

The FPCS Inventory Web Application has several user friendly features to assist the user in navigating and selecting information within the system. These features are called as breadcrumbs, paging, section headings, sorting, drilling down as well as search results page sizing. The following sections will provide additional information on how to use these features.

BREADCRUMBS

A Breadcrumb (See Figure 1.2) gives users a way to track their location within the FPCS Web Application; the user will see a breadcrumb on every screen. The breadcrumb will change based on the screen user has navigated.

User Administration	Asset Item	Custodian	Maintenance	Reporting	Logout
Asset Item > View Asse	ets >				
Asset Item Search					

Figure 1.2 – Breadcrumb

SECTION HEADINGS

Section Headings divide the information on the screen. The section headings will assist the user to determine what information is currently being viewed. A Section heading is displayed as a red bar (See Figure 1.3).

FPCS INVENTORY USER MANUAL

User Administration	Asset Item	Custodian	Maintenance	Reporting		Logout
> User Administration > (Create User					
Sign Up for New Ac	count					
		User Id:*				
		Password:*				
	Confi	irm Password:*				
		E-mail:*				
assign a Role to the	e User>					
		Role:*	AddAsset Admin Reports Supervisor User			
User Information	>					
		Last Name:*				
		First Name:*				
		Employee #:*				
		Department:*				
		Office Phone:				
						Create User

Figure 1.3 – Section Headings

PAGING

After the user conducts a search or view information that spans to additional pages, the user can page through the results. By clicking on the page number (See Figure 1.4), the user can view the additional information. The page numbers will be displayed at the bottom of the results screen.

 $1\ \underline{2}\ \underline{3}\ \underline{4}\ \underline{5}\ \underline{6}\ \underline{7}\ \underline{8}\ \underline{9}\ \underline{10}\ ...}$

Figure 1.4 – Paging

SORTING DATA

Any column heading in a grid that has a hyperlink can be sorted (See Figure 1.5).

To sort by a particular column heading, use the following instructions:

- 1. Determine which column heading user would like to be sorted.
- 2. Click once on the desired column title / header to sort data.

User Adr	ninistratio	n Asset <mark>Item Custodian Main</mark>	tenance Reporting			Logout
> Reportin	g > Report	5				
Reports	List New					
Group	Туре	Report	Access List	Modified By	Last Modified	
Generic	Report	ISBN Search	Admin Raports Usar	-handlen	5/15/2010 8:30:07 AM	113
Generic	Report	Asset Item by Building and Room	Admin Reports User	mmoss	9/13/2010 7:41:43 AM	P / / 3



DRILLING DOWN ON DATA

Selected data in each grid can be drilled down if additional information is available for a particular field (See Figure 1.6).

A hyperlink on a particular field will signify additional data is available for that item.

- a) Determine the field on which user want to drill down to view the information.
- b) Click on the particular hyperlink within the grid to view additional information.

				т	otal R Sea	tecords: 39322 arch Clear			
Bar Code	Category	Building	Room	<u>Status</u>	Old Tag	Description	Manufacturer	Model#	Serial#
	IT Department	COLLEGIATE ACADEMY WOODSON	CAF			POPCORN VENDER	POP N GO	7000	30007
200004	IT Department	WOODRIDGE	JA107			ROUTER	CENTRECOM	MR820TR	S0D572988
200416	IT Department	WOODRIDGE	JA115			LAMINATING MACHINE	XYRON	2500 B	006635
200449	IT Department	WOODRIDGE	JA115			TV TUBE	SHARP	25-M100	699634

Figure 1.6 – Drilling down Data on Barcode number Link

PAGE SIZE

By default, there are 20 (twenty) records displayed on each grid or table (the page size is adjustable as a system configured parameter). The user can view 20 records on the screen. If there are more than 20 records, the user will see paging feature described in paging module in section 'paging' (See Figure 1.4)

LOGGING IN

To login into the FPCS Inventory Web Application, make sure you have a valid username and password. Once you have a valid username and password, do the following (See Figure 1.7):

- Step 1 Open Internet Explorer
- Step 2 In the Address bar, type in the FPCS Inventory management web address: <u>http://www.friendshipinventory.com/</u>
- Step 3 Click the 'Go' icon or press enter key on the keyboard or click ($\stackrel{\bullet}{\longrightarrow}$) icon to load the application.
- Step 4 On the home page, enter your username and password.





USER GROUPS

Users are assigned to different user groups based on their functionality in the application. There are five defined user groups:

- Administrator Group
- Reports Group
- Add Asset Group
- Supervisor Group
- User Group (Default User)

Administrator Group

The Administrator group has full access to all the modules in the FPCS application. The Administrator has the ability to:

- User Administration Module
 - Create, Modify/Update User

- o User Search
 - Reset / Change Passwords
- Delete User Accounts
- DAL Performance logs
- Create Roles
- Asset Items Module
 - o View Assets
 - o Add New Asset Items
 - o Mass Assets
 - o Asset Fields
 - o Item Disposal
 - $\circ \quad \text{Item Depreciation} \quad$
 - o Transfer
 - o Scan Asset Items
- Custodians Module
 - View Custodians
 - Create New Custodian
 - Students List Import
- Maintenance Module
 - View Categories
 - View Sub Categories
 - o View Statuses
 - o View GL Codes
 - View Vendor Types
 - View Address Types
 - View Contact Types
 - o Cat-SubCat Mapping
 - o Import Format
 - o Add/View Field Mappings
 - Add/View Vendors
- Reports Module
 - View & Run Reports
 - Create Reports
 - Export Reports Data
 - Create/Edit Admin Reports
 - o Create Command
 - Parameters
 - o Columns
 - Connection Strings

Reports Group

The Reports group has limited access to the different modules in the FPCS application. The Reports user has the ability to:

- User Administration Module
 - Change Password
- Reports Module
 - View & Run Reports
 - Create Report
 - Export Reports Data

Add Asset Group

The Add Asset Group has limited access to the different modules in the FPCS application. The Add Asset group has the ability to:

- User Administration Module
 - Change Password
- Asset Items Module
 - o Add New Asset Items
 - o Add Mass Asset Items

Supervisor Group

This Supervisor User Group has access to all user groups like Reports Group, Add Assets Group and Users Group.

- User Administration Module
 - Change Passwords
 - o DAL Performance logs
- Asset Items Module
 - $\circ \quad {\sf View} \ {\sf Assets}$
 - o Add New Asset Items
 - Add/Update Mass Assets
 - Asset Fields
 - o Item Disposal
 - o Item Depreciation
 - o **Transfer**
 - o Scan Asset Items
- Custodians Module
 - View Custodians
 - Create New Custodian
 - o Students List Import
 - Maintenance Module
 - View Categories
 - View Sub Categories
 - View Statuses
 - View GL Codes
 - View Vendor Types
 - View Address Types
 - View Contact Types
 - Cat-SubCat Mapping
 - Add/View Import Format
 - Add/Update Field Mappings
 - Add/View Vendors
- Reports Module
 - View & Run Reports
 - Export Reports Data
 - o Create Reports
 - Create/Edit Admin Reports
 - Create Command

- Parameters
- o Columns

Users Group

The Users Group has limited access to the different modules in the FPCS application. The Users group has the ability to:

- User Administration Module
 - o Change Password
- Asset Items Module
 - $\circ \quad \text{View Assets} \\$
 - o Add New Asset Items
 - Add Mass Asset Items
 - o Item Disposal
 - Item Depreciation
 - o Transfer
 - o Imports
 - o Scan Asset Items
- Custodians

•

- View Custodians
- o Add New Custodians
- Students Import
- Maintenance Module
 - Add/View Import Format
- Reports Module
 - View Report List
 - Create Report
 - View and Run Report
 - Export Report

USER ADMINISTRATION Module

The User Administration module is used by the FPCS administrator group. This module provides the users the ability to create new user profiles, update user profiles, change passwords and search, view user profiles, DAL Performance Logs and create roles.

Create User

The Create User screen provides the users the ability to create new users for the FPCS application (see Figure 1.8).

Automate Create Us Public Charter School	d Inventory Support System er
	Welcome
User Administration Asset Item Custodian Maintenance Report	ing Logout
> User Administration > Create User	
Sign Up for New Account	
User Id:*	
Password:*	
Confirm Password:*	
E-mail:*	
Assign a Role to the User	
Role:*	AddAsset Admin Reports Supervisor User
User Information	
Last Name:*	
First Name:*	
Employee #:*	
Department:*	
Office Phone:	
Pow	Create User

Figure 1.8 – Create New User

Note: * indicates the field is required

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'User Administration' option from the menu bar at the top of the screen.
- Step 3 Click 'Create User' from the drop-down list under the 'User Administration' option from the menu bar at the top of the screen.
- Step 4 Enter the new User Id in the 'User Id' field (e.g. User name is John Doe the User Id is: jdoe first initial of the First Name and Last Name without spaces).
 - or -

Provide User ID in the 'User Id' field.

Step 5 – Enter the password in the 'Password' field

Note: The password must be a '**strong**' password and contain at least seven (7) characters with one (1) capital letter, one (1) special character and one (1) number.

- Step 6 Re-enter the same password in the 'Confirm Password' field.
- Step 7 Enter the users e-mail address in the 'E-mail' field.
- Step 8 Assign the user's Role by clicking on one of roles listed in the 'Role' field.
 - 1. Add Asset Adding of Assets
 - 2. Admin Administrator Access
 - 3. Reports View and Run of Reports
 - 4. User Default User
 - 5. Supervisor Supervisor user has access to many modules

Step 9 – Enter the user's Last Name in the 'Last Name' field.

Step 10 – Enter the user's First Name in the 'First Name' field.

Step 11 - Enter the user's Employee number (#) in the 'Employee #' field.

Step 12 – Enter the user's Department name in the 'Department' field.

Step 13 – Enter the user's office phone number in the 'Office Phone' field.

Step 14 – Click the 'Create User' button on the bottom right hand side of the screen.

Update User Profile

The user is able to update user profiles using the 'Update User' screen (See Figure 1.9).

Automated In Update User Fields Charler School	iventory Support System
	Welcome
User Administration Asset Item Custodian Maintenance Reporting	Logout
> User Administration > Update User	
Update User	
User Id:*	
E-mail	
Update the Role of the User	
Kvie:	Addusset Adom Reports Supervisor User
Update User Information	
Last Name:*	
First Name:*	
Employee #:*	
Department:*	
Office Phone:	
Modifed User/DateTime:	1/10/21/2010 3:21 AM
	Update
Powered t	by PITech, LLC. ©2005-2010 All Rights Reserved.

Figure 1.9 – Update User

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'User Administration' option from the menu bar at the top of the screen.
- Step 3 Click 'Update User' from the drop-down list under the 'User Administration' option from the menu bar at the top of the screen.
- Step 4 The Administrator may enter new information for the following fields:
 - E-mail, Role, User Last Name, User First Name, Employee #, Department, Office Phone
- Step 5 Click the 'Update' button on the bottom right hand side of the screen.

Change Password

The users are	e able t	o chan	ge passw	ords using the Change Password screen (see Figure 1.10)).
User Administration	Asset Item	Custodian	Maintenance	Reporting	Logout
> User Administration >	Change Passw	ord			
Change Password					
				Password:	
				New Password:	
				Confirm New Password:	
				Change	Password Cancel

Figure 1.10 - Change Password Screen

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'User Administration' option from the menu bar at the top of the screen.
- Step 3 Click 'Change Password' from the drop-down list under the 'User Administration' option from the menu bar at the top of the screen.

Step 4 – The Administrator or FPCS user must enter the current password in the 'Password' field.

Note: The password must be a '**strong**' password and contain at least seven (7) characters with one (1) capital letter, one (1) special character and one (1) number.

Step 5 – The Administrator or FPCS user may enter a new password in the 'Password' field.

Step 6 – Re-enter the same password in the 'Confirm New Password' field.

Step 7 – Click the 'Change Password' button on the bottom right hand side of the screen.

User Search

The user is able to search the FPCS application for specific users using the User Search screen. This screen displays user information (See Figure 1.11):

User Administ	tration Asset Item Custodian Maintenance Rep	orting			Logout		
> User Administ	ration > User Search						
User Search	Information						
Use	ri -	Role	e: Admin 🚽	Search Clear			
Update Total	Filtered Users in System: 12						
User	Email	IsOnline	Last Login Date	Locked Out	Role		
bbeck	bbeck@friendshipschools.org	No	10/21/2010 10:39:38 AM	-	Admin	5	13
cfodrell	cfodrell@friendshipschools.org	No	10/21/2010 10:34:38 AM		Admin	5	13
cpowell	cpowell@friendshipschools.org	No	10/21/2010 10:36:11 AM	-	Admin	2	13
csanwo	csanwo@friendshipschools.org	No	10/21/2010 10:50:14 AM		Admin	5	13
dgorham	dgorham@friendshipschools.org	No	10/21/2010 10:33:44 AM		Admin	5	13
dsule	dsule@friendshipschools.org	No	10/21/2010 10:35:19 AM		Admin	5	13
ggains	ggains@friendshipschools.org	No	10/21/2010 10:36:54 AM		Admin	5	13
gmiller	gmiller@friendshipschools.org	No	10/21/2010 10:32:48 AM		Admin	5	13

Figure 1.11 – User Search

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'User Administration' option from the menu bar at the top of the screen.
- Step 3 Click 'User Search' from the drop-down list under the 'User Administration' option from the menu bar at the top of the screen.

The Administrator Group may perform the following functions:

- 1. Unlock user account
- 2. Check whether user is online or offline
- 3. Check user last logged in information
- 4. Reset the user password
- 5. Delete the user profile
- 6. Edit user profile like user role.

Unlock User Account

The Administrator users are able to determine if a particular user is currently online, locked out of the application or verify their last logged info into the application.

Note: If a user's password is reset then the application automatically sends an email to the user's email account on file.

Step 1 – Administrator user logs into FPCS Inventory.

- Step 2 Hover over the 'User Administration' option from the menu bar at the top of the screen.
- Step 3 Click 'User Search' from the drop-down list under the 'Administration' option from the menu bar at the top of the screen. Click on 'Search' button to display the user search information.

If the user account is locked, click the (\square) icon to unlock the account.

How to Change User's Role

- Step 1 -Click on pencil icon (\swarrow) on the far right hand side of the user to change the role.
- Step 2 Select the new role from the list box in the 'Update the Role of the User' list for the user to change the role.
- Step 3 Click the 'Update' button on the Bottom Right hand side of the screen.

How to Reset User's Password

Step 1 − Click on the undo arrow () on the far right hand side of the User to reset the password. Step 2 − Click the 'OK' button on the pop up window.

Step 3 – Changed password will be displayed below section heading 'User Search Information' with the message "new password for the user 'xxxxx' (user name) is 'yyyyy' (password) an email also will be sent to his email address on file."

Note: An automatic email will be sent to the user with a temporary password.

Deleting a User's Profile

Step 1 -Click on the Delete icon () on the far right hand side of the User profile to delete. Step 2 -Click the 'OK' button on the pop up window.

DAL Performance Log

The user has the ability to view (DAL) Data Access Layer Performance Logs and Summary information (See Figure 1.12):

User Administration As	set item	custo	sian Maintei
> User Administration > DAL Per	formance I	Log	
Data Access Layer Pe	rforma	nce Lo	g Summary
Function	Call Coun	Average	Max Min
SetReportDetails	16	0.666	8.097 0.047
GetIdFromCode	57	0.159	7.504 0.000
GetReportParameterDetails	28	0.182	4.072 0.000
DelRptUserGroup	16	0.180	1.716 0.000 🏓
GetReportDetails	16	0.067	0.655 0.016
SetReportUserGroup	71	0.041	0.624 0.000 🍠
GetParamValueTypes	6	0.125	0.546 0.000 🥬
LogActivity	264	0.004	0.546 0.000 🍠
GetObjects	95	0.016	0.390 0.000
GetColumns	14	0.064	0.390 0.000 🌶
DelReport	5	0.193	0.359 0.109
GetReportsList	23	0.106	0.312 0.031 🏓
SetFileInfo	1	0.172	0.172 0.172
GetAssetItems	3	0.057	0.172 0.000
GetReportRun	2	0.094	0.172 0.016
LogError	64	0.007	0.140 0.000 5
GetParameterList	19	0.005	0.109 0.000
GetPerformanceLogSummary	7	0.035	0.109 0.016 5
GetParametersList	21	0.019	0.094 0.000 /
GetOtherParametersList	1	0.094	0.094 0.094 🌶
GetFileInfo	1	0.078	0.078 0.078
UserLogIn	15	0.019	0.062 0.000 /
GetTablesList	18	0.008	0.047 0.000 /
GetCodes	48	0.002	0.031 0.000 /
SetFileInfoErr	22692	0.001	0.031 0.000
UserLogOut	7	0.004	0.016 0.000 /
GetConnectionStrings	12	0.003	0.016 0.000 /
GetData	8	0.002	0.016 0.000 /
GetReportGroups	5	0.012	0.016 0.000
GetAssetValuations	3	0.005	0.016 0.000 /
GetImportFormatList	15	0.001	0.016 0.000 /
SetUserInfo	11	0.001	0.016 0.000 /
GetPerformanceLogDetails	2	0.005	0.016 0.000
GetAssetItemDisposalCount	3	0.005	0.016 0.000 /
GetDataSources	4	0.004	0.016 0.000
GetReportColumns	5	0.006	0.016 0.000 /
GetFilesInfo	17	0.002	0.016 0.000
GetCustodians	17	0.004	0.016 0.000 /
GetAssetData	9	0.002	0.016 0.000
DelFileInfo	1	0.016	0.016 0.016 /
SetImportFormat	1	0.000	0.000 0.000 5
SetProcessedStatus	1	0.000	0.000 0.000 5
TestConnectivity	3	0.000	0.000 0.000
GetUserInfo	3	0.000	0.000 0.000 /
Data Assess Lawren De			De la claste

Figure 1.12 – Data Access Layer (DAL) Performance Log Summary

- Step 1 Administrator logs into FPCS Inventory.
- Step 2 Hover over the 'User Administration' option from the menu bar at the top of the screen.
- Step 3 Click 'DAL Performance Log" from the drop-down list under the 'User Administration' option from the menu bar at the top of the screen.

View the DAL Performance Log

The user can view the DAL performance log of the function user wish to intend to view the logs (See Figure 1.13):

- Step 1 Administrator logs into FPCS Inventory.
- Step 2 Hover over the 'User Administration' option from the menu bar at the top of the screen.
- Step 3 Click 'DAL Performance Log" from the drop-down list under the 'User Administration' option from the menu bar at the top of the screen.

Data Access Layer Performance Log Details Information									
User	Function	Date	Execution Time in sec						
pindla	SetFileInfo	10/21/2010 10:59:00 AM	0.172						

Figure 1.13 – View Data Access Layer (DAL) Performance Logs

Step 4 – Click on () magnifying glass symbol to view the logs of the intended function. Once it is clicked the logs are displayed below the list of DAL Functions.

Create Role

The user is able to view/add roles to the system. This screen displays roles information (See Figure 1.14):

User Administration A	sset Item Cust	odian Mai	intenance		Reporting	Logout
User Administration > Cre	ate Role					
	A	plication	Roles			
	Role Name:			(Add	
	Role	Role Exists	Role Used			
	AddAsset	Yes	No	8	1	
	Admin	Yes	Yes			
	Reports	Yes	No	3		
	Supervisor	Yes	No	9		
	User	Yes	No	9		

Figure 1.14 – Create Role

- Step 1 Administrator logs into MBN Inventory.
- Step 2 Hover over the 'User Administration' option from the menu bar at the top of the screen.
- Step 3 Click on 'Create Role' from the drop-down list under the 'User Administration' option from the menu bar at the top of the screen.
- Step 4 Provide the New 'Role Name' and click on 'Add' button to add a new role to the existing application roles
- Step 5 Also Administrator can see the present Application Roles, Role Exists, Role used and Trash button.
- Step 6 Administrator can also delete the Application Role if required by clicking the trash icon of the 'Role' wish to delete.

ASSET ITEM Module

This module provides the ability to View Assets, Adding New/Updating Asset Items, Insert/Update Mass Assets, Item Disposal, Item Depreciation, Transfer and Scan Asset Items.

View Assets

The View Assets screen provides the users the ability to search for Asset Items of the FPCS application (see Figure 2.1). The user has many options to search the Asset items by providing various keywords under different available options like Bar Code, Description/Title, Category, Sub Category, Manufacturer/Publisher, Model #/Author, Serial #, Last Inventoried, Status, Condition, Room, Custodian, Student, PO #, PO Date, Purchase Price, Acquisition Method, Funding Source, Funding Agency, Program Assigned, Purchaser, Floor, Department, GL Codes and ISBN. The user also has the ability to search on the dynamically added asset item fields.



Figure 2.1 – View Assets

The user can search the FPCS database for required Asset Item information by various ways. Either by selecting a value from the drop down list by clicking on the down arrow image or directly entering the text in the text box of the selected field. The user can then click on 'search' button in the screen and it will display a list of Asset items.

User can also search the information without entering any information in the available search option boxes and by clicking 'search' button the system will display the entire list of Asset items.

The user also has the ability to select the individual asset items for Mass Update or Mass Disposal

Asset Item search

User can search the Asset item information with the following steps:

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Asset Item' option from the menu bar at the top of the screen.
- Step 3 Click 'View Assets' from the drop-down list under the 'Asset Item' option from the menu bar at the top of the screen.
- Step 4 Click on down arrow beside the box of 'Bar Code' or' Description/Title' or 'Category' or 'Sub Category' or 'Manufacturer/Publisher' or 'Model #/Author' or 'Serial #' or 'Last Inventoried' or 'Status' or 'Condition' or 'Room' or 'Custodian' or 'Student' or 'PO #' or 'PO Date' or 'Purchase Price' or 'Acquisition Method' or

'Funding Source' or 'Funding Agency' or 'Program Assigned' or 'Purchaser' or 'Floor' or 'Department' or 'GL Codes' or 'ISBN' to select the text from the existing list or directly type the text in the drop down box and select the date where ever there is an option to select the date from the pop up calendar.

- Step 5 Enter values in the Dynamic Asset Fields
- Step 6 Click on search button in the middle of the screen below search options to display the search results.

New Asset Item

The New Asset screen provides the users the ability to Add New Asset Items to the FPCS application (see Figure 2.2). The user has many options to enter the New Asset item information like Bar Code, Old Tag, Category, Manufacturer/Publisher, Model #/Author, Serial #/Copyright, Last Inventoried, Status, Condition, Room, Custodian, Student, Building/Location, Description/Title, Acquisition Method, Funding Source, Funding Agency, Program Assigned, Purchaser, Floor, Life Span, ISBN, Department, PO #, Rack, Bin, PO Date, Purchase Price, Current Value, Group Controlled, Quantity, Total Value, IT Asset, GL Code, Sub Category, Function, Notes and Comments. The user also has the ability to add values for the added dynamically asset item fields.



Figure 2.2 – Adding New Asset Info Screen

Adding New Asset Item

User can add the New Asset item information.

Step 1 – User logs into FPCS Inventory.

Step 2 – Hover over the 'Asset Item' option from the menu bar at the top of the screen.

- Step 3 Click 'New Asset' from the drop-down list under the 'Asset Item' option from the menu bar at the top of the screen.
- Step 4 By default the user will be in 'Asset Item information' tab. User may enter all the necessary information to fill the text boxes like Bar Code, Old Tag, Category, Manufacturer/Publisher, Model #/Author, Serial #/Copyright, Last Inventoried, Status, Condition, Room, Custodian, Student, Building/Location, Description/Title, Acquisition Method, Funding Source, Funding Agency, Program Assigned, Purchaser, Floor, Life Span, ISBN, Department, PO #, Rack, Bin, PO Date, Purchase Price, Current Value, Group Controlled, Quantity, Total Value, IT Asset, GL Code, Sub Category, Function Notes and Comments in the Asset information Tab.
- Step 5 Enter values in the Dynamic Asset Fields
- Step 6 Click on save button which is at the bottom of the 'Asset Item Information' window to add the New Asset Item to FPCS Inventory.
- Step 7 After saving the New Asset Item Information click on 'Pictures' tab to add the pictures of the New Asset Item OR click on 'Asset Item Status Change History' to view the New Asset Item status change history OR click on 'Asset Item Change History' to view the Asset item change history.

Mass Assets

The Mass Asset screen provides the users the ability to Add/Update Mass Asset Items to the FPCS application (see Figure 2.3). The user has many options to enter the Mass Asset item information like Bar Code Prefix, Bar Code Range, Old Tag, Category, Manufacturer/Publisher, Model #/Author, Serial #/Copyright, Last Inventoried, Status, Condition, Room, Custodian, Student, Building/Location, Description/Title, Acquisition Method, Funding Source, Funding Agency, Program Assigned, Purchaser, Floor, Life Span, ISBN, Department, PO #, Rack, Bin, PO Date, Purchase Price, Current Value, Group Controlled, Quantity, Total Value, IT Asset, GL Code, Sub Category, Function, Notes and Comments.

User Administration	nistration Asset Item Custodian Maintenance Reporting Logout									
Accot Itom Inform	ation									
Bar Code Prefix:	auon	Bar Code Range:		To						
Update BarCodes List:	WOD6078351WOD607836	5 WOD611395		-10-						
Old Tag:		Category:	-							
Manufacturer/Publisher:		Model #/Author:		Serial #/Copyright:						
Last Inventoried:		Status:	•	Condition:						
Room:		Custodian:	•	Student:	•					
Building/Location:		Description/Title:								
Acquisition Method:		Funding Source:		Funding Agency:						
Program Assigned:		Purchaser:		Floor:						
Life Span:		ISBN:		Department:						
PO #:		Rack:		Bin:						
PO Date:		Purchase Price:		Current Value:						
Group Controlled:		Quantity:		Total Value:						
IT Asset:		GL Code:	•	Sub Category:	•					
Function:				*						
				-						
Notes:				*						
				-						
Comments:				*						
				-						
Dynamic Fields										
Modified User		No Dynamic Fiel	ds Exists.							
Modified User:		Modified Date Time:	lear							
		Save	accar							

Figure 2.3 – Adding/Updating Mass Asset Information Screen

User can add/update the Mass Asset item information.

Step 1 – User logs into FPCS Inventory.

- Step 2 Hover over the 'Mass Item' option from the menu bar at the top of the screen.
- Step 3 Click 'Mass Asset' from the drop-down list under the 'Asset Item' option from the menu bar at the top of the screen.
- Step 4 In the Asset Information section User may enter all the necessary information to fill the information like Bar Code Prefix, Bar Code Range, To, Old Tag, Category, Manufacturer/Publisher, Model #/Author, Serial #/Copyright, Last Inventoried, Status, Condition, Room, Custodian, Student, Building/Location, Description/Title, Acquisition Method, Funding Source, Funding Agency, Program Assigned, Purchaser, Floor, Life Span, ISBN, Department, PO #, Rack, Bin, PO Date, Purchase Price, Current Value, Group Controlled, Quantity, Total Value, IT Asset, GL Code, Sub Category, Function, Notes and Comments in the Asset information Tab.
- Step 5 Enter values in the Dynamic Asset Fields
- Step 6 Click on save button which is at the bottom of the 'Asset Item Information' window to add the Mass Asset Item to FPCS Inventory.

Asset Fields

The Asset Fields screen provides the users the ability to search Asset Field Items in the FPCS application (see Figure 2.4).



Figure 2.4 – Asset Field Search Screen

User can search Asset Fields for information.

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Asset Item' option from the menu bar at the top of the screen.
- Step 3 Click 'Asset Fields' from the drop-down list under the 'Asset Item' option from the menu bar at the top of the screen.
- Step 4 In the Asset Fields search page, user can either enter name of the 'Field' and select the Field 'Type' like 'String' or 'Big Integer' or 'Integer' or 'Small Integer' or 'Tiny Integer' or 'Small Money' or 'Numeric' or 'Decimal' or 'Float' or 'Real' or 'Boolean' or 'Date Time' or 'Small Date Time' or 'Foreign Key' and then click 'Search' button to display the search results. User can also just click on 'Search' button without selecting 'Field Name' or 'Field Type' to display the entire search results.

New Asset Item Fields

The New Asset Item Field screen provides the users the ability to Add Asset Item Fields in the FPCS application dynamically (see Figure 2.5).

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Figure 2.5 – New Asset Item Field Screen

Adding New Asset Item Fields:

Step 1 – User logs into FPCS Inventory.

- Step 2 Hover over the 'Asset Item' option from the menu bar at the top of the screen.
- Step 3 Click 'Asset Fields' from the drop-down list under the 'Asset Item' option from the menu bar at the top of the screen.
- Step 4 Click 'New' link in the 'Asset Fields Details New' section heading and a new screen is display with the section headings 'Asset Item Fields', 'New Table Field Information' and 'Foreign Key Constraint Field Information'
- Step 5 User can check the static fields defined along with data types of asset item table like 'Key Type', 'Field Name', 'Type', 'Length', 'Precision', 'Scale', 'Nullable', 'Constraint', 'Default' and 'Index' before creating a dynamic field in the section heading 'Asset Item Fields'
- Step 6 User has to enter New Field information in the section heading 'New Table Field Information' with required information like 'Field Type' (String, Big Integer, Integer, Small Integer, Tiny Integer, Small Money, Money, Numeric, Decimal, Float, Real, Boolean, Date Time, Small Date Time and Foreign Key), 'Field Name', 'Length', 'Decimal Places', 'Nullable', 'Default' Values and click 'Save' button to save new field into the FPCS Inventory database.
- Step 7 If user wants to define a foreign key constraint to the new asset item field, then user has to select Foreign Key from 'Field Type' in the section heading 'New Table Field Information' and provide the necessary information like 'Field Name' & 'Nullable' option and select the 'Foreign Key Table', 'Code' and 'Description' in the section heading 'Foreign Key Constraint Field Information'. Once required information is provided the SQL query is automatically generated in the 'SQL' box and click on 'Save' button to save the new asset item field information to the FPCS inventory database OR click 'clear' button to clear the fields.

Item Disposal Module

The Item Disposal Screen provides the users the ability to dispose of items in the FPCS application (see Figure 2.6).



Figure 2.6 – Item Disposal

Viewing of Asset Item Disposal

User can view the Asset item disposal information by performing following steps:

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Asset Item' option from the menu bar at the top of the screen.
- Step 3 Click 'Item Disposal' from the drop-down list under the 'Asset Item' option from the menu bar at the top of the screen.
- Step 4 User will get a link under the head 'ID' and number of items disposal under count. Click on the link to view the item disposal information in detail.

Note: User will get this disposal list only if there are already any asset items listed under Asset Item Disposal List. Else, user will just get a 'New Report' button under the section heading 'Asset Item Disposal List' to create new Asset Item Disposal List.

Step 5 – Item disposable information is shown in table format with the headings Asset Tag, Description, Status, Model Number, Serial Number, Date Acquired, and Book Value. Every item disposal will have a link (drill down) under the head Asset tag; click the link to see the detailed information of the item in the item disposal list.

Adding Asset Item Disposal

User can add the Asset item disposal information by performing following steps:

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Asset Item' option from the menu bar at the top of the screen.
- Step 3 Click 'Item Disposal' from the drop-down list under the 'Asset Item' option from the menu bar at the top of the screen.
- Step 4 User will get a 'New Report' button below section heading. Click on the 'New Report' button to add the item disposal information.
- Step 5 A drop down list for Bar Code will appear, click on down arrow to select the bar code from the existing list of bar code numbers or directly type the bar code number and click on 'add' button.
- Step 6 Next screen will show the Asset Item information which is under 'Item Disposal'.
- Step 7 Click on (w) symbol beside 'close' button to open 'Property Disposal Form' in MS word application where the user has to proceed with the procedure related to Property disposal by taking the approval of necessary department heads like Manager, Head, Facilities etc. for maintaining the record.
- Step 8 Click on 'Update' button to update the Asset item to the list of 'Item Disposal' or close to cancel the operation.

Updating Mass Asset Item Disposal

User can dispose of multiple Asset items by performing following steps:

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Asset Item' option from the menu bar at the top of the screen.
- Step 3 Click 'View Assets' from the drop-down list under the 'Asset Item' option from the menu bar at the top of the screen.

- Step 4 Click on down arrow beside the box of 'Bar Code' or' Description/Title' or 'Category' or 'Sub Category' or 'Manufacturer/Publisher' or 'Model #/Author' or 'Serial #' or 'Last Inventoried' or 'Status' or 'Condition' or 'Room' or 'Custodian' or 'Student' or 'PO Date' or 'PUrchase Price' or 'Acquisition Method' or 'Funding Source' or 'Funding Agency' or 'Program Assigned' or 'Purchaser' or 'Floor' or 'Department' or 'GL Codes' or 'ISBN' to select the text from the existing list or directly type the text in the drop down box and select the date where ever there is an option to select the date from the pop up calendar.
- Step 5 Enter values in the Dynamic Asset Fields
- Step 6 Click on search button in the middle of the screen below search options to display the search results.
- Step 7 Click on the checkbox next to each of the asset items that needs to be selected for mass disposal
- Step 8 Click on the Mass Disposal button
- Step 9 the system redirects to the Mass Item Disposal screen (see Figure 2.7)

User Adn	ninistration As	sset Item	Custodian	Maintenance	Reporting				Logout		
> Asset Ite	em > Item Disposa	I									
Add Asset Item Disposal											
	Ba	ar Code: 20	0004	~					Add		
Asset Item Disposal Details											
Asset Tag	Description		<u>Status</u>	Model Numbe	r Serial Number	Date Acquired	Book Value				
<u>200449</u>	TV TUBE				699634		0.00	8			
200416	LAMINATING MAC	HINE		▼ 2500 B	006635		0.00	9			
200004	ROUTER			MR820TR	S0D572988		0.00	3			
							0.00				
Update	Close W										

Figure 2.7 – Mass Item Disposal

Item Depreciation

The 'Item Depreciation' Screen provides the users the ability to provide the Asset Depreciation rates for the categories and subcategories for seven depreciation periods/time in the FPCS application (see Figure 2.8).

User Administratio	on Asset Ite	m Custodian	Maintenance	Reporting						Logout
> Asset Item > Item	Depreciation									
Asset Depreciati	on Informa	tion								
Category	SubCategory	1st Dep Rate	2nd Dep Rate	3rd Dep Rate	4th Dep Rate	5th Dep Rate	6th Dep Rate	7th Dep Rate	User	Date Modified
Audio-Visual		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Books		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Communications		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Desktop Computer		0.00	0.00	0.00	0.00	0.00	0.00	0.00]	
Equipment		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Furniture		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Furniture		0.00	0.00	0.14	0.10	0.10	0.10	0.10	pindla	11/08/2010 11:27:55 PM
Group Controlled		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
IT Department		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
IT Department		0.00	0.00	0.10	0.10	0.10	0.10	0.10	pindla	11/08/2010 11:27:55 PM
LapTop		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Network Hardware		0.00	0.00	0.00	0.00	0.00	0.00	0.00]	
Office Equipment		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
PC Peripheral		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Portable Computer		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Printer		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Text Books		0.00	0.00	0.00	0.00	0.00	0.00	0.00		
Text Books		0.00	0.00	0.00	0.00	0.00	0.00	0.00	pindla	11/08/2010 11:27:56 PM
Thin-Client Computer		0.00	0.00	0.00	0.00	0.00	0.00	0.00		

Figure 2.8 – Item Depreciation

Step 1 – User logs into FPCS Inventory.

- Step 2 Hover over the 'Asset Item' option from the menu bar at the top of the screen.
- Step 3 Click 'Item Depreciation' from the drop-down list under the 'Asset Item' option from the menu bar at the top of the screen.
- Step 4 User will get a table for list of categories, subcategories and depreciation rate for seven periods / time. User needs to provide the rate for the required depreciation period / time and then click on 'save' button to update the FPCS Inventory.

Note: If depreciation value for a combination of category and subcategory are not defined then the system defaults the values for the depreciation value for a defined category.

Transfer

The 'Transfer' Screen provides the users the ability to transfer Asset items between students and teachers (see Figure 2.9).

Friendship Public Charter School	Autom	ated Inventory Support System er	Welcome
User Administration Asset Item Cu	ustodian Maintenance R	Reporting	Logout
> Asset Item > Transfer			
Transfer Asset Items			
Bar	r Code:		Add

Figure 2.9 – Item Transfer

Step 1 – User logs into FPCS Inventory.

- Step 2 Hover over the 'Asset Item' option from the menu bar at the top of the screen.
- Step 3 Click 'Transfer' from the drop-down list under the 'Asset Item' option from the menu bar at the top of the screen.
- Step 4 Click the down arrow to select the Bar Code of the Asset item from the list of Drop down box or directly type the barcode and click on 'add' button.
- Step 5 The Transfer Asset item information is displayed in table format, click the radio button beside student if you wish to transfer the item to student, if you wish to transfer to teacher then click on the teacher radio button and select the person that these asset items are going to be transferred.
- Step 6 To view the Transfer Asset item information user can click on the barcode link (drill down) under the asset tag column to view the detailed information of the Transfer Asset Item.
- Step 7 Click on Update button to complete the transfer.

Scan Asset Items

The 'Scan Asset Items' screen provides the users the ability to upload the scanned Asset items file (see Figure 2.10)

Friendship Public Charter School			Auto File 1	mated Inventory Support System Import	ſ	Welcome
User Administration	Asset Item	Custodian	Maintenance	Reporting		Logout
> Asset Item > Scan Ass	et Items					
Scanned Asset Iter	ns					
Upload File:				Browse	Add File	
First Row contains He	ader Select Up	load Format:	FPCS_TextbookD)ata 🗸	Text Delimiter: Comma	

Figure 2.10 - Scan Asset Items

Step 1 – User logs into FPCS Inventory.

Step 2 – Hover over the 'Asset Item' option from the menu bar at the top of the screen.

- Step 3 Click 'Scan Asset Items' from the drop-down list under the 'Asset Item' option from the menu bar at the top of the screen.
- Step 4 Click on 'Browse' button, select the student file and click on ok.
- Step 5 Select file Upload Format and Select the Text Delimiter options if the uploading file has the Comma, pipe, Semi column and Tab
- Step 6 Click the checkbox if the uploading file has the header in the First row.

Step 7 – Click on 'Add File' button to add the students list to FPCS Inventory.

Note: Please check the option 'First Row contains Header' if the first row in Asset Items file contains header information. Select appropriate option for 'Text Delimiter' like comma, pipe, semicolon and tab.

CUSTODIAN Module

This module provides the ability to View Custodians, Create New/Update Custodians and import Students information file.

View Custodians

The 'Custodians' Screen provides the users the ability to view the list of custodians (see Figure 3.1).

Friendship Public Charter School	Automated Inventory Support System Custodians List							Welcome
User Administration	Asset Item	Custodian	Maintenance	Reporting				Logout
> Custodian > View Cust	odians							
Custodian Search								
Last Name:				First Name:		Type:	*	Search Clear
No Record Found								

Figure 3.1 – Custodians List

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Custodian' option from the menu bar at the top of the screen.
- Step 3 Click 'View Custodians' from the drop-down list under the 'Custodians' option from the menu bar at the top of the screen.
- Step 4 User will have the options to search the custodians either by their 'Last Name', 'First Name', or by 'Type'
 Teacher or student. Else, user can leave all the fields blank and click on search button to list the entire list of students and teacher custodians. Click on 'Search' button.
- Step 5 –User receives the screen with list of custodian information in table format with many fields. However, user can see the details of the particular custodian by clicking the name of custodian in the 'name' column.
- Step 6 Click 'clear' button to go back to custodian search.

New Custodian

The 'New custodian' screen provides the users the ability to create a new custodian (see Figure 3.2).

Friendship Public Charter School	Welcome		
User Administration	Asset Item Custodian Maintenance Reporting		Logout
> Custodian > New Custo	lian		
Custodian Informati	on		
Title:	Last Name	e: First Name:	
Department:	Department Head	d: Building:	
Room:	Phone	EMail:	
Type:	↓ ID Number	n	
Modified User:	Modified DateTime		
		Save) (Clear)	

Figure 3.2 – New Custodian Screen

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Custodian' option from the menu bar at the top of the screen.
- Step 3 Click 'New custodian' from the drop-down list under the 'Custodians' option from the menu bar at the top of the screen.

- Step 4 User will get several options to enter the details of the New Custodian like Title, Last Name, First Name, Department, Department Head, Building, Room, Phone, Email, Type, ID Number and Save and Clear Buttons.
- Step 5 Enter all the relevant information of new custodian and click on 'Save' button to update the FPCS Inventory.
- Step 6 Click 'clear' button to clear all the fields which are entered.

Students Import

The 'Students Import' screen will provide the users the ability to import the list of students into the FPCS Inventory (see Figure 3.3)

Friendship Public Charter Schoo	Automated Inventory Support Syste File Import	
		Welcome
User Administra	ation Asset Item Custodian Maintenance Reporting	Logout
> Custodian > Stud	dents Import	
Students File		
Upload Format:	Customer_Default -	
Upload File:	Browse	Add File
Text Delimiter:	Comma 🔫	
Import Format Fi	First Row contains Header elds: TypeIn,UserId,sIDNumber,sDepartmentName,sLastName,sFirstName,sPhone,sEMa	nil

Figure 3.3 – Students Import

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Custodian' option from the menu bar at the top of the screen.
- Step 3 Click 'Students Import' from the drop-down list under the 'Custodians' option from the menu bar at the top of the screen.
- Step 4 Click on 'Browse' button, select the student file and click on ok.
- Step 5 Select file Upload Format and Select the Text Delimiter options if the uploading file has the Comma, pipe, Semi column and Tab
- Step 6 Click the checkbox if the uploading file has the header in the First row.

Step 7 – Click on 'Add File' button to add the students list to FPCS Inventory.

Note: Please check the option 'First Row contains Header' if the first row in student file contains header information. Select appropriate option for 'Text Delimiter' like comma, pipe, semicolon and tab.

MAINTENANCE Module

This module provides the ability to View Categories, Sub Categories, Statuses, GL Codes, Vendor Types, Address Types, Contact Types, Cat-SubCat Mapping, Import Format, Field Mappings and Vendors.

View Categories/Subcategories/Statuses/GL Codes/Vendor Types/Address Types/Contact Types

The 'View Categories' screen will provide the users the ability to View and create type and Description details for Category, Custodian, File Types, GL Codes, Status, Sub Category, Vendor Type, Address Type and Contact Type (see Figure 4.1)

Friendship Public Charter Scho	ool				
					Welcome
User Administr	ration Asset Item Custodian	Maintenance	Reporting		Logout
> Maintenance >	View Categories				
Codes Catego	iry 👻				
Category Type	Description	Delete	User	Date Modified	
Category AV	Audio-Visual		1	10/21/2010 02:04:42 AM	
Category BKS	Books			10/21/2010 02:04:42 AM	
Category COMM	Communications		L	10/21/2010 02:04:42 AM	
Category DC	Desktop Computer			10/21/2010 02:04:42 AM	
Category EQPT	Equipment		L	10/21/2010 02:04:42 AM	
Category FURN	Furniture	E	L	10/21/2010 02:04:42 AM	
Category NH	Network Hardware			10/21/2010 02:04:42 AM	
Category OEQPT	Office Equipment			10/21/2010 02:04:42 AM	
Category pCP	PC Peripheral			10/21/2010 02:04:42 AM	
Category pC	Portable Computer			10/21/2010 02:04:42 AM	
Category PRNT	Printer		í.	10/21/2010 02:04:42 AM	
Category TCC	Thin-Client Computer			10/21/2010 02:04:42 AM	
Category					
Category					
Category					
Category				Save	

Figure 4.1 – View Categories, Subcategories, Status, File Types, GL Codes, Vendor Type, Contact Type, Address Type

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Maintenance' option from the menu bar at the top of the screen.
- Step 3 Click 'View Categories' or 'View Sub Categories' or 'View Statuses' or 'View GL Codes' from the dropdown list under the 'Maintenance' option from the menu bar at the top of the screen.
- Step 4 The information related to 'Category' or 'Sub Category' or 'Statuses' or 'GL Codes' or 'Vendor Types' or 'Contact Types' or 'Address Types' is displayed in table format according to the option selected and user can delete the existing 'category' or add a new 'category'.
- Step 5 If the user wants to delete one of the 'Category' or 'Sub Category' or 'Statuses' or 'GL Codes' or 'Vendor Types' or 'Contact Types' or 'Address Types' types, click on check box to check the option beside the 'category' or 'Statuses' or 'GL Codes' type user wish to delete and click on 'Save' button at the bottom of the table.
- Step 6 To create a new 'Category' or 'Sub Category' or 'Statuses' or 'GL Codes' or 'Vendor Types' or 'Contact Types' or 'Address Types' enter new information in the blank fields of 'Type' and 'Description' and click on 'Save' button at the bottom of the table.

Import Format

This module provides the option to view, delete and create Import Format using fields of various tables (See Figure 4.2):

Friendship Public Charter School		Auton Searc	stem	Welcome					
User Administration	Asset Item	Custodian	Maintenance	Reporting			Logout		
> Maintenance > Import	Format								
Search File Import	Formats								
Name:		Category:			Type:	•	Search Clear		
Import Format Det	ails <u>New</u>								

Figure 4.2 – Import Format Screen view

- Step 1 User logs into FPCS Inventory
- Step 2 Hover over the 'Maintenance' option from the menu bar at the top of the screen
- Step 3 Click on 'Import Format' under Maintenance, Import Format Screen will be displayed (see figure 4.2)

Search File Import Formats

Friendship Public Charter Sch	001			Automa Search I	ited Inventory Su File Import Form	upport System ats	n			W	/elcome	
User Administ	ration As	set Item	Custodian	Maintenance Report	ting					Logou	t	
> Maintenance >	Import Form	net										
Search File	Import F	ormats										
Name:				Category:	-		Туре:	•	Se	arch Ck	tar.	
Total Record Cou	nt: 16											
Import Forn	nat Detail	s that										
Name	Category	Type	Table			For	mat			User Modified	Date Modified	
testi	Equipment	Scanned Asset Items	tbl_AssetItems	TypeIn,UserId,sBarCode,sDascr	ription,sOldTag,hStatus,sRoom,	sBldg,hCategory,hCusto	dianId			1	10/25/2010 03:13:08 AM	3
Testing2	Network Hardware	Scanned Asset Items	tbl_AssetItems	TypeIn,UserId,sMfgr,sDescriptio	on,sRoom,sOldTag,hCategory,h	hStatus, hCustodianId, sFk	por,sRack			1	10/25/2010 03:13:08 AM	8
FPCS_Furniture	Furniture	Scanned Asset Items	tbl_AssetItems	TypeIn,UserId,sBldg,sRoom,sBa	arCode,sDescription,sMfgr,sMod	delNo,sSerialNo,dLastInv	entoried, hStatus, sFundingSourc	e,sFundingAgency		1	10/25/2010 03:13:08 AM	3
FPCS_Textbooks	Text Books	Scanned Asset Items	tbl_AssetItems	TypeIn, UserId, sBldg, sRoom, sBa	arCode,sDescription,sMfgr,sMod	delNo,sSerialNo,sISBN,dL	astInventoried,sFundingSource,	sFundingAgency		1	10/25/2010 03:13:08 AM	8
FPCS_IT	IT Department	Scanned Asset Items	tbl_AssetItems	TypeIn,UserId,sBldg,sRoom,sBa	arCode,sDescription,sMfgr,sMod	delNo,sSerialNo,dLastInv	entoried,hStatus,sFundingSourc	e,sFundingAgency		1	10/25/2010 03:13:08 AM	3

Figure 4.3 – Search File Import Formats Screen

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Maintenance' option from the menu bar at the top of the screen.
- Step 3 Click on 'Import Format' under Maintenance, Import Format Screen will be displayed.
- Step 4 Type File format 'Name' or Select 'Category' or select 'Type' of file then click on 'Search' Button to display the search results (see figure 4.3)
- Step 5 To view the details of the file click on the file name under the column head 'Name'
- Step 6 To delete the File Import Format click on the trash icon user which to delete the file and click confirm on next screen whether you are sure to delete the file 'Yes ' or 'No'.

File Import Formats



Figure 4.4 – File Import Format Screen

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Maintenance' option from the menu bar at the top of the screen
- Step 3 Click on 'Import Format' under Maintenance, Import Format Screen will be displayed
- Step 4 Click on 'New' click in the section Heading 'Import Format Details'
- Step 5 In the Next screen (see figure 4.4) provide File 'Format Name'
- Step 6 Select the 'Category Name' user wish to create new import format from drop down list
- Step 7 Select the table Name to load the column / field names into the 'Available Fields' list box from drop down list
- Step 8 Add or Remove the fields from 'Available Fields' List box to 'Selected Fields' List box using 'Left' and 'Right' arrows
- Step 9 Sort the fields in the 'Selected Fields' list box to the required order using 'Up' and 'Down' arrows
- Step 10 Click 'Save' button to save the info to database or click on 'Clear' button to clear the fields and redo the work.

Field Mappings

This module provides the option to view, delete, create and map the fields to various tables (See Figure 4.5):

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Maintenance' option from the menu bar at the top of the screen
- Step 3 Click on 'Field Mappings' under Maintenance, Field Mappings Screen will be displayed
- Step 4 The Screen will display the field mappings for Source, Destination, SQL command and option to delete field mapping.
- Step 5 User can Create, edit the field mappings as per requirement and click on 'Save' button to save the field mapping
- Step 6 If the user wishes to delete the existing field mappings, check the check box of the field mapping user wish to delete and click on 'Save' button to save the new settings.

Field Mappings Encisito bic Charter School											
odian Maintenance Reporting					Logout						
Destination	SQL	Del User			Date Modified						
Table: tbl_Data	Select * From tbl Data (nolock)	- E	1	1	08/02/2010 02:44:51 PM						
Code: id											
Description: sFileName		+									
Table: vw Custodian	Select * From vw Custodian (nolock)	A [1	1	08/02/2010 02:49:17 PM						
Code: id	Where hType<>'STNT'		~ I								
Description: Name	82.0	+									
Table: tbl_Codes 🗸	Select * From tbl Codes (nolock) Where		E 1	1	08/02/2010 02:56:05 PM						
Code: sType	sCategory='Category'										
Description: sDescription	10 50 40 40 50 50 50 50 50 50 50 50 50 50 50 50 50	÷									
	Field Mappings Destination Table: tbl_Data Code: id Description: sFileName Table: tbl_Codes Code: id Description: sFileName Table: tbl_Codes Table: tbl_Codes Table: tbl_Codes Code: if d Description: Name Table: tbl_Codes Code: sType Description: sDescription	Destination SQL Table: tbl_Data Code: id Description: sFileName Select * From tbl_Data (nolock) Code: id Description: sFileName Select * From vw_Custodian (nolock) Code: id Description: sAme Table: tbl_Codes Table: tbl_Codes Code: id Description: same Select * From tbl_Codes (nolock) Where stagony='Category'	Destination SQL D Table: tbl_Data • Select * From tbl_Data (nolock) • Table: vw_Custodian • Select * From tbl_Data (nolock) • Table: vw_Custodian • Select * From tbl_Data (nolock) • Code: id • • • Description: sFielName • • • Table: tbl_Codes • Select * From tbl_Data (nolock) • Table: tbl_Codes • Select * From tbl_Codes (nolock) where • • Code: id • • • • Description: Name • • • • Code: id • • • • Description: same • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • • •	Destination SQL Del Table: tbl_Data Select * From tbl_Data (nolock) Code: id Select * From tbl_Data (nolock) Table: twl_Costoian Select * From tbl_Data (nolock) Code: id Select * From tbl_Data (nolock) Description: sPileName Select * From tbl_Codes (nolock) Table: tbl_Codes Select * From tbl_Codes (nolock) Where Code: id Select * From tbl_Codes (nolock) Where Code: id Description: speecription: speecription	Destination SQL Del User Table: tbl_Data Select * From tbl_Data (nolock) 1 Table: twl_Codes id Select * From vwl_Custodian (nolock) 1 Table: twl_Codes id Select * From vwl_Custodian (nolock) 1 Table: tbl_Codes Select * From tbl_Codes (nolock) 1 Table: tbl_Codes Select * From tbl_Codes (nolock) where is Type 1 Code: id Select * From tbl_Codes (nolock) where is Type 1 Code: id Select * From tbl_Codes (nolock) where is tbl_Codes (nolock) where (nolock) (nolock) (nolock) (nolock) (nolock) (nolock						

Figure 4.5 – Field Mappings

Cat-SubCat Mapping

This module provides the option to add subcategories for various categories (See Figure 4.6):

Automated In

User Administra	ation A	sset Item (Custodian	Maintenance	Reporting	Logout							
> Maintenance > Cat-SubCat Mapping													
Category - SubCategory Mapping Details													
Category	SubCate	gory Delete	User	Date M	odified								
-	-												
•	-												
-	-												
						,							
			Save										

Figure 4.6 – Category-Subcategory Mappings

REPORTING Module

The Reporting module is used for creating and running various reports by users of FPCS Inventory. This module provides the ability to:

- a) View, Edit and Create Reports
- b) View, Edit and Create Parameters
- c) View, Edit and Create Report columns
- d) View, Edit and Create New Connection Strings

View Reports

The 'Report List' screen will provide the users the ability to Run, Admin Edit, Edit and delete available reports in the system. However, only the Admin Group Users has the ability to Admin Edit and Delete options (see Figure – 5.1).

Friendship Public Chart	er School	F	lutomated Inventory Su leports	pport System		Welcome
User Adr	ninistratio	on Asset Item Custodian Mainten	ance Reporting			Logout
> Reportin	g > Report	5				
Reports	List Nev	N.				
Group	Туре	Report	Access List	Modified By	Last Modified	
Generic	Report	Asset Item by Building and Room	Admin Reports User	mmoss	9/13/2010 7:41:43 AM	× / / 3
Generic	Report	Assets by GLCode	Admin Reports User	pindla	9/13/2010 4:47:00 AM	P / 1 3
Generic	Report	Assets by PO#/Status/Asset Tag/Date Acquisition	Admin Reports User	pindla	8/16/2010 6:28:57 AM	113
Generic	Report	Book by Title	Admin Reports User	mmoss	9/13/2010 8:02:23 AM	P / 1 3
Generic	Report	Books by Location	Admin Reports User	mmoss	9/13/2010 7:45:17 AM	P / J 3
Generic	Report	Books By School	admin	pindla	10/21/2010 11:02:39 AM	P / 1 3
Generic	Report	Books by Status & Category	Admin Reports User	pindla	8/16/2010 2:37:03 AM	P / J 3
Generic	Report	Books In Storage	Admin Reports User	moglesby	9/13/2010 5:48:54 AM	2113
Generic	Report	Current Values	Admin Reports User	pindla	8/16/2010 2:37:59 AM	113
Generic	Report	ISBN & Building	Admin Reports User	pindla	8/26/2010 7:14:35 PM	P / / 3
Generic	Report	ISBN Search	Admin Reports User	mhamilton	9/13/2010 6:30:07 AM	2103
Generic	Report	Items By Condition	Admin Reports User	pindla	8/16/2010 3:30:52 AM	P 1 1 3
Generic	Report	Items by ISBN	Admin Reports User	pindla	9/13/2010 4:48:55 AM	113
Generic	Report	User Log	Admin Reports User	pindla	8/17/2010 12:04:04 PM	P 1 1 3

Figure 5.1 – Reports List

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Reporting' option from the menu bar at the top of the screen.
- Step 3 Click 'Reports' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen.

Step 4 – Reports list is displayed with the options to Run, Admin Edit, Edit and delete report.

- a) Run option () is shown with magnifying glass symbol. This run option is used to run the specific report to execute. A Report User or Administrator user Group can use this option.
- b) Admin Edit option (22) is shown with pen symbol. This Admin Edit option is used to Edit the Report Details, SQL Details and create New SQL Details, Report Properties, assign Roles to Report and Edit & add new columns. Only Admin Group Users can perform this task.
- c) Edit option (2) is shown with pencil symbol. This Edit option is used to edit the Report Details, Assign Roles to Report, Report properties and command details. Only Admin Group Users can perform this task.
- d) Delete option () is shown with trash icon symbol. This delete option is used to delete the report selected. Only Admin Group Users can perform this task.

Run Reports

A user has the ability run the Report.

Step 1 – User logs into FPCS Inventory.

Step 2 – Hover over the 'Reporting' option from the menu bar at the top of the screen.

- Step 3 Click 'Reports' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen.
- Step 4 Reports list is displayed with the options to Run, Admin Edit, Edit and delete report.
- Step 5 Click on 'run' (¹) magnifying glass icon option to execute the report.
- Step 6 Enter search criteria like 'Building' and 'Room' and click 'Submit'. User can also enter the Log Parameters Step 7 Review the results grid for the information based on the search criteria
- Step 8 Export the results to PDF (), Excel ()) or HTML ()) by clicking the respective icons on the report (see Figure 5.2) User can also view the run report history.

Friendship Public Charter Sc	tool		Automated Inv View Report	ento	жу Ѕирро	ort S	ystem				
											Welcome
User Adminis	stration Asset Item Custodian Maint	enance	Reporting								Logout
	Conceptual provide a conceptual de la conce										
Asset Item	by Building and Room Report										
				Buildin	ISLOW PIER	RCE					
				Roo	m :						
						-		100			
-						Subm	it Clear				
				Crite	aria searched: E	Building: 8 Room:	SLOW PIERCE				
		STDC	m sbarcode sdescription	snifg	rismodelno sse	eriaino (Piez diastinventoried s 25/2010 12:00:00 AM	se sort before expo	Record Court: 6188 rting to selected file format: 1 9 9 10 Imber custodianname category Imployee. Comission Furniture		
		_	FPCS237619 TABLE-WORK	1	1	8/3	22/2010 12:00:00 AM	1	Employee, Comission Furniture		
		_	FPCS237620 TABLE-WORK			8/3	25/2010 12:00:00 AM		Employee, Comission Furniture		
		_	FPC5237621 TABLE-WORK	-		8/3	22/2010 12:00:00 AM		Employee, Comission Furniture Employee, Comission Furniture		
		_	FPC5237623 TABLE-WORK			8/	22/2010 12:00:00 AM		Employee, Comission Furniture		
			FPCS237624 TABLE-WORK			8/3	25/2010 12:00:00 AM		Employee, Comission Furniture		
			FPCS237625 TABLE-WORK	-		8/3	22/2010 12:00:00 AM		Employee, Comission Furniture		
		102	FPCS237407 FILE CABINET	HON	M78	KMBX B/	22/2010 12:00:00 AM		Employee, Comission Furniture		
		102	FPC5237413 CHAIR-STACKING	HON	D29	98Y1 8/	22/2010 12:00:00 AM		Employee, Comission Furniture		
		102	FPCS237410 CHAIR-STACKING	HON	4041 DTQ	QBP1 8/3	22/2010 12:00:00 AM		Employee, Comission Furniture		
		102	BLP412641 CART-AV			8/3	20/2010 12:00:00 AM		Employee, Comission Furniture		
		102	BLP412543 DESK-L-ATTACHMEN EBCS 220129 CHAIR-STACKING	T		8/	20/2010 12:00:00 AM		Employee, Comission Furniture Employee, Comission Furniture		
		102	FPC5223082 CHAIR-STACKING	1		8/3	22/2010 12:00:00 AM		Employee, Comission Furniture		
		102	FPCS223085 CHAIR-STACKING			8/3	22/2010 12:00:00 AM		Employee, Comission Furniture		
		102	FPC5223086 CHAIR-STACKING	_		8/2	20/2010 12:00:00 AM		Employee, Comission Furniture		
		102	FPC5235121CHAIR-STACKING FPC5235849 STORAGE-CURBY	-		8/	20/2010 12:00:00 AM		Employee, Comission Furniture Employee, Comission Furniture		
				-	1	23456	78910>>				
Enter Lon Pa	arameters										4
Los Report:											
Log Report. 40					102						
					1						
uniterenter en											
Log Comments:					- 10						
Parash Due I	12-1			_							
Report Run P	nistory										
User	Run Date		1	Comn	nent	Chida	DISTRICT Groom-	1.	Parameter	values	
pindia	10/25/2010 7:07:15 AM			-		@bido	-FRANCIS HAMMOND	1, @room=%,			
pindia	10/25/2010 4:57:15 AM					(toldo	- GEORGE WASHINGTO	DN 2, @room=%,			
pindia	10/25/2010 3:58:59 AM					Coldo	BLOW PIERCE, @roo	m=%, m=107			
pindia	10/10/2010 3:38:49 AM			_		0000	- BLOW PIERCE, @100	m= 103,			



Admin Edit

Only Administrator or Supervisor Users can Admin Edit the Report.

Step 1 – User logs into FPCS Inventory.

Step 2 – Hover over the 'Reporting' option from the menu bar at the top of the screen.

- Step 3 Click 'Reports' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen.
- Step 4 Reports list is displayed with the options to Run, Admin Edit, Edit and delete report. Click on Admin Edit (pen symbol) option to edit the details like:
 - a) Report Name, Description, Type, Sort Expression, Grid Group and upload the file with Report URL are under the section head 'Report Details'
 - b) Header Format, Header Parameters and Footer are under the section heading 'Report Properties'
 - c) Assign roles like Add Asset, Admin, Reports, Supervisor and user to the reports are under the section heading 'Assign Roles/Users to Report'
 - d) SQL command under the section heading 'SQL Details', click on the SQL command link to edit the command, edit the details, test the command and save the command or delete the command. Delete SQL details if required by clicking the trash icon.
 - e) Edit the column details under the section heading 'Columns New' by clicking the column name OR click on 'New' link in this section heading to create new columns like name, check or uncheck the option 'sortable', Field, Sort Expression, Number, Width, Format, Type like 'bound field' or 'checkbox field' or 'date field' or 'hyperlink field' or 'image field', Cell Header Field, Cell Footer Field, Horizontal align like 'center' or 'char' or 'justify' or 'left' or 'not set' or 'right' and save the new column details. Delete columns if required by clicking the 'trash' icon. Return to main page

Iship Charter School	Create Report	ntory Support System		
				Welcor
Administration Asset Item	Custodian Maintenance Reporting			Logout
rt Details				
Report Name: Asset Item by B	ulding and Room	Description: Asset Item by Building and Room		
Type:		Sort Expression:		
Geld Genue:				
Generic 👻				
File:		Browse		
Save to DB				
Report URL:		*		
		÷		
Generate Re	sport Uri			
t Properties				
Header Format:		Header Parameters:		
Foster				
addasset				
Robel USPa 20055551 armin reports Puber/Rock Intel Tan/Kode Name		Canacition States		201
Addes (USES - 0000555) Address - 0000555 Address - 000055 Address - 0000555 Address - 000055 Address - 0000555 Address - 0000555 Address - 0000555 Address - 0000555 Address - 0000555 Address - 0005555 Address - 0005555 Address - 0005555 Address - 00055555 Address - 000555555 Address - 00055555555555555555555555555555555	avra-ezenică di 48664 hataneavre con Intel Ostag-ezenica	Canacity Store 19. UK 19-kzerologi Associo-Rozer (126)	jas. Desanter-sē.dis	201
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Nets vales and second s	ando-segree de de 48855 Nationsaure con jintel Catego-eccent stoom Patel stoom Patel stoom Patel stoom Patel stoom Stoom patel	Connection Stome Studer To Assert Property 1234 Advant Age Sect Rearrants place and a Section Age place and a Section	Jac. Ortisstems 8. dio Bouches Bouches Bouches Bouches Bouches Bouches Bouches Bouches Bouches Bouches Bouches Bouches	5014 20150000 2 2 3 4 6 6 7 7 8 7 7 8 9
Net of an announce of a state of	ance accessed do 498554 noticesource on United Cataloge accesses jacom Fault jacom Fault post-case post-ca	Canaccition States do Later 10 - A space was from the space a 224, inter 10 - A space was from the space a 224, inter 2000 A 200 inter 2000 A 200 inter 200 int	Jas Gelastiters I.e.Is Isourfied Isourfied Isourfied Isourfied Isourfied Isourfied Isourfied Isourfied Isourfied Isourfied	2014 Adva2000 2 3 4 5 5 6 6 7 7 8 9 9 10

Step 5 - Click on 'save' button to save the Admin Edit report settings (see Figure 5.3).

Figure 5.3 – Admin Edit Screen of Reports

Edit Reports

Only Administrator User can edit the system Report. Any user can edit his private reports:

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Reporting' option from the menu bar at the top of the screen.
- Step 3 Click 'Reports' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen.
- Step 4 Reports list is displayed with the options to Run, Admin Edit, Edit and delete report. Click on Edit (pencil symbol) option to edit the details of the report. This functionality is similar to the create report functionality (see figure 5.4).

Friendship Public Charter School		Autor Creat	mated Inventory Support System te Report	
				Welcome
User Administration As	set Item Custodian	Maintenance	Reporting	Logout
Step 1 - Report Details	5			
Report Name:	Asset Item by Building	and Ro	Description: Asset Item by Building and Room	
Grid Group:	Generic 🔻			
Assign Roles/Users to	Report			
Roles/Users:	Private addasset admin reports supervisor user			
Report Properties				
Header Format:			Header Parameters:	
Footer:				
Command Details	Stored Procedure	501		
()pe	Stored Procedure C .	avr.		Clear Save >>

Figure 5.4 – Edit Screen of Reports

Delete Reports

Only Administrator or Supervisor User can delete the Report.

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Reporting' option from the menu bar at the top of the screen.
- Step 3 Click 'Reports' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen.
- Step 4 Reports list is displayed with the options to Run, Admin Edit, Edit and delete report.
- Step 5 Click on 'trash' icon option to delete the report.

Create Reports

The 'Create Report' screen will provide the users the ability to Create/Edit Report settings, user has to enter the details like Report Name, Description, Grid Group, Option for Private Reports, Assign Roles/Users to Report, Report properties like Header Format, Header Parameters, Footer and Command details like Stored Procedure or SQL Type (see Figure – 5.5).



Figure 5.5 – Create New Report

Step 1 – User logs into FPCS Inventory.

- Step 2 Hover over the 'Reporting' option from the menu bar at the top of the screen.
- Step 3 Click 'Reports' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen.
- Step 4 Click on 'New' link in the section heading 'Reports List New', user has to enter the details like:
 - a) Report Name, Description and Grip Group under the section head 'Report Details'
 - b) Check the 'Private' check box if the user wants to share the report with other users and groups. Once the check box is checked the 'Roles/Users' list box updated with list of other users, user can select name of other users by holding 'control / Ctrl' key on keyboard (multiple selection of Roles/Users) to share the report. Else, do not check the 'Private' check box in case user does not want share the report.
 - c) Assign roles like Add Asset, Admin, Reports, Supervisor and user to the reports under the section heading 'Assign Roles/Users to Report'
 - d) Header Format, Header Parameters and Footer under the section heading 'Report Properties'
 - e) Select command type under the section heading 'Command Details'
- Step 5 Click on 'save' button to save the report settings (see Figure 5.5).
- Step 6 Click on the button '>>' to save report and move to the next step of creating command of type Stored Procedure or SQL (see Figure 5.6).

User Administrat	ion Asse	t ltem	Custodia	n M	aintenance	Reportin	g					-	Logout	
Report Details														
Report Name:	Test1													
Description:	Test1													
Step 3 - Stored	Procedu	ire Deta	ils											
Stored Procedures:	Usp_GetAssettemsByBarCode usp_GetAssettemsByGLCode usp_GetAssettemsByPONum usp_GetAssettemStatusHistory usp_GetAssetValuations usp_GetAsstItemsByBldgAndRoom usp_GetAsstItemsByStatus usp_GetCodesByCategory usp_GetContact usp_GetCurrentValues													
Parameters:	Name	Туре			Parameter			Default	Order					
	@BarCodes	AnsiString	@BarCod	les (Li	stBox)	~	%	6	1					
SQL:	Exec usp_G	GetAssetIt	emsByBar(Code (@BarCodes									*
														Ŧ
		Su	ccessfull	y Test	ted the SP: To	otal Record	Co	ount Return	ed = 0 Clear	Tes	st Comma	nd	Save	>>

Figure 5.6 - Create New Report - Step 3 Create Stored Procedure Command

- Step 7 If command type 'stored procedure' is selected then in the next step of the screen user will get the options to edit the details like:
 - a) Various stored procedures for selection, Parameters, SQL Box under the section head 'Step 3 Stored Procedure Details'.
 - b) The parameter information grid is refreshed based on the selected stored procedures parameters.
 - c) The user has an option to select the parameter from the dropdown values or enter a default value under the parameters grid.

- d) The user can test the Stored Procedure command against the database by clicking on the 'Test Command' button. A corresponding success or error message will be displayed on the screen indicating the validity of the command.
- e) The user can save the command details by clicking on 'Save' button. This button click automatically tests the command validity.
- f) The user can click '>>' button to go to next step of creating columns (see Figure 5.7).

User Administ	tration Asse	et Item Cus	todian Maintenanc	e Reporting	Logout
Report Deta	ils				
Report Name: T	Test1				
Description: T	Test1				
Command: E	ect Columns	setItemsByBar	Code @BarCodes		~
Columns: s s s s s s s s s	sroom sbarcode sdescription smfgr smodelno sserialno dlastinventoried scondition sponumber				
					Clear Save

Figure 5.7 - Create New Report - Step 4 Create Stored Procedure Command's Report Columns

- Step 8 For creating the columns of the stored procedure type command report, the user has the option to select column details like:
 - a) User can select the various columns for the report from the available list of columns under the section head 'Step 4 Select Columns'.
 - b) The user can save the column details by clicking on 'Save' button (see Figure 5.7).

Friendship Public Charter School		Automated Invento Create Report	ry Support System	
				Welcome
User Administration	Asset Item Custodian Maintenance	e Reporting		Logout
Report Details				
Report Name:	test1			
Description:	testing			
Step 2 - Table Details				
1428.	©U_assettimes ©U_Assettimes ©U_Assettimes ©U_AssettimeStudietoy ©U_AssettimeStudietos ©U_CassetUistons ©U_CassetUistons ©U_CassetUistons ©U_CassetUistons ©U_CassetUistons ©U_Data			
Columns	C All C Unique C Top SanCose All C Unique C Top SanCose Sancos Sancos Sancos Sancose Sancos Sancos Sancos Sancose Sancos Sancos Sancos Sancose			
Filtering:	Field ØBiog 28/02 - ØBiog - - - - - - - - - - - - - - - - - - - - -	Parameter/Value Defaul (Lookup) w w w w w	t order 0 3 0 8 0 8 0 8 0 8 0 8 0 8 0 8 0 8	
Ordering:	Field Order Ascending Ascending Ascending Ascending Ascending Ascending Ascending			
sqt:				(Cear) Test Command Store

Figure 5.8 - Create New Report - Step 2 Create SQL Details

- Step 9 If command type 'SQL' is selected then in the next step of screen user will get the options to edit the SQL details like (see Figure 5.8):
 - a) User can select a table from the list of available table's options. The list of columns is refreshed based on the selected table in the Columns list, the Field dropdown control of the Filtering and Ordering grids.
 - b) The user can select the columns option like All, Unique and Top.
 - c) If All option is selected, all the columns in the list of columns is selected
 - d) If Top option is selected, a text box to enter the number of records is displayed.
 - e) The user can select the columns for the report from the displayed list of columns.
 - f) The user can select various columns to filter the data on using the 1st column 'Field' of the Filtering grid, then the operand needs to be selected from the 2nd column of the filtering grid. The user then selects the parameter or a default value from the dropdown list in the 3rd column 'Default/Parameter' of the filtering grid. The 3rd column can also be left blank, in which case the system auto generates a lookup parameter based on the field selected in the 1st column of the filtering grid.
 - g) The user then has the option to sort the data by selecting the field from the 1st column 'Field' of the Ordering grid, then the order sequence of ascending or descending is selected from the 2nd column 'order' of the ordering grid.
 - h) The user can test the SQL command against the database by clicking on the 'Test Command' button. A corresponding success or error message will be displayed on the screen indicating the validity of the SQL command.
 - i) The user can save the command details by clicking on 'Save' button. This button click automatically tests the command validity.

PARAMETERS

The 'Parameters' screen will provide the users the ability to search the parameters created like parameter name, screen type, table name, lookup field and return field (see Figure – 5.9).

Automated Inventory Support System Report Parameters List								
And the second			w	elcome				
User Administration Asset Item	Custodian Maintenance	Reporting	Logo	out				
> Reporting > Parameters								
Parameters Search								
Name:	×	Screen Type:						
Table Merry		Lock to Cald						
Table Name:	×	LookUp Held:	×					
Keturn Heid:	1 Million	Tatal Passadar 20						
		Courte Class						
		Search						
Parameter Details New								
Name	bi	Description	Туре					
@ProjectId		Project	DropDownList	3				
@Status		Status	DropDownList	3				
@BarCode		Bar Code	LookUp	3				
@Bldg		Building	LookUp	3				
@Room		Room	LookUp	3				
@Condition		Condition	LookUp	3				
@PONumber		Purchase Order Number	LookUp	3				
@Start		Start Date Entry	TextBoxDate	3				
@End		End Date Entry	TextBoxDate	3				
@Category		Category	DropDownList	3				
@hStatus		hStatus	LookUp	3				
@sISBN		sISBN	LookUp	3				
@UserId		UserId	LookUp	3				
@GLCode		GL Code	DropDownList	3				
@hStudentId		hStudentId	LookUp	3				
@sAcquisitionMethod		sAcquisitionMethod	LookUp	3				
@sBldg		sBldg	LookUp	3				
@sTitle		sTitle	LookUp	3				
@sCreateUser		sCreateUser	LookUp	3				
@sMfgr		sMfgr	LookUp	9				

Figure 5.9 – Parameter List

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Reporting' option from the menu bar at the top of the scree
- Step 3 Click 'Parameters' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen.
- Step 4 Select any of the available listed string by clicking down arrow beside the available options like Name,
 Screen type, Table Name, Lookup Field or Return Field and then click 'Search' button to display the search results of parameters OR just click on the search button to list the entire list of parameters.

Edit Parameter

Step 1 – User logs into FPCS Inventory.

- Step 2 Hover over the 'Reporting' option from the menu bar at the top of the screen.
- Step 3 Click 'Parameters' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen.
- Step 4 Select any of the available listed string by clicking down arrow beside the available options like Name, Screen type, Table Name, Lookup Field or Return Field and then click 'Search' button to display the search results of parameters OR just click on the search button to list the entire list of parameters.
- Step 5 Click on the parameter name which has hyperlink to edit the available options like Parameter Name, Description, Screen Type, Length, Description Field, Code Field, List Box Rows, List Box Width, Selection Mode, Control ID, Required Checkbox, Data Type, Repeat columns, Error description, Validation Expression, Note, Service Path, Service Method, Table Name, Lookup Field, Return Field, Invalid Message, Event Trigger, Function call, Connection String and SQL command and then click 'Save' button to save the changed parameters (see Figure – 5.9).

New Parameter

The 'New Parameter' – screen will provide the users the ability to Create the parameters, and the user has to enter the details like Parameter Name, Description, Screen Type, Length, Description Field, Code Field, List Box Rows, List Box Width, Selection Mode, Control ID, Required Checkbox, Data Type, Repeat columns, Error description, Validation Expression, Note, Service Path, Service Method, Table Name, Lookup Field, Return Field, Invalid Message, Event Trigger, Function call, Connection String and SQL command (see Figure – 5.10).

Friendship Public Charter School	1	Automated Inventory Suppor Report Parameter	rt System	
				Welcome
User Administration	Asset Item Custodian	Maintenance Reporting		Logout
Parameter Detail	s			
Parameter Name:		Description:		
Screen Type:	DatesFromTo 🔻	Length:		
Description Field:		Code Field:		
List Box Rows:		List Box Width:		
Selection Mode	Single 🔻	Control Id:		
Required:		Data Type:	string T	
		Value Data Type:	• •	
Repeat Columns:		Error Description:		
Validation		Note:		
Expression:				
Service Path:		Service Method:		
Table Name:		LookUp Field:		
Return Field:		Invalid Message:		
Event Trigger:		Function Call:		
Connection String:	Data Source=acpsnewdb.db.44	196654.hostedresource.com;Initial Catalog=act	psnewdb;User ID=acpsnewdb;Password=Probar	#1234; •
SQL Command:			×	
		Save Clear		

Figure 5.10 – Edit/Create Parameter

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Reporting' option from the menu bar at the top of the screen.
- Step 3 Click 'Parameters' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen.
- Step 4 Click 'New' link in the section heading 'Parameter Details New'
- Step 5 Enter all the required details enter the details like Parameter Name, Description, Screen Type, Length, Description Field, Code Field, List Box Rows, List Box Width, Selection Mode, Control ID, Required Checkbox, Data Type, Repeat columns, Error description, Validation Expression, Note, Service Path, Service Method, Table Name, Lookup Field, Return Field, Invalid Message, Event Trigger, Function call, Connection String and SQL command as shown in Figure 5.10 and click on save to create Parameter.

COLUMNS

The 'Columns' screen will provide the users the ability to view the column details report wise and create new columns for the existing reports (see Figure -5.11).

Automated Inventory Support System Report Columns Public Charter School							
						Welcome	
User Administration	Asset Item Custo	dian Maintenance	Reporting	1		Logout	
> Reporting > Columns							
Report Details							
Report: A	sset Item by Building a	nd Room					
Column Details Ne	W.						
Name		Field	1	Sort Expression	Туре	Order	
sRoom	sRoom		sRo	om ASC	BoundField	1	3
sBarCode	sBarCoo	le	sBa	rCode ASC	BoundField	2	3
sDescription	sDescrip	tion	sDe	escription ASC	BoundField	3	3
sMfgr	sMfgr		sMf	gr ASC	BoundField	4	3
<u>sModelNo</u>	sModelN	0	sMc	odelNo ASC	BoundField	5	3
sSerialNo	sSerialN	0	sSe	erialNo ASC	BoundField	6	9
dLastInventoried	dLastInv	rentoried	dLa	stInventoried ASC	BoundField	7	3
sCondition	sConditi	on	sCo	ondition ASC	BoundField	8	8
sPONumber	sPONum	ber	sPC	Number ASC	BoundField	9	13
CustodianName	Custodia	anName	Cus	stodianName ASC	BoundField	10	8
Category	Categor	y	Cat	egory ASC	BoundField	11	3



View Report Columns

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Reporting' option from the menu bar at the top of the screen.
- Step 3 Click 'Columns' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen.
- Step 4 The user needs to select the report type under the section heading 'Report Details' to display the Column Details and then the column details are displayed in the table format under the section heading 'Column Details New'.

Edit Report Columns

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Reporting' option from the menu bar at the top of the screen.
- Step 3 Click 'Columns' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen.
- Step 4 The user needs to select the report type under the section heading 'Report Details' to display the Column Details and then the report details are displayed in the table format under the section heading 'Column Details New'.
- Step 5 Click on the link of column type in the 'Name' column of the section heading 'Column Details New' of the columns wishes to edit.
- Step 6 Edit the column details like name, check or uncheck the option 'sortable', Field, Sort Expression, Number, Width, Format, Type like 'bound field' or 'checkbox field' or 'date field' or 'Hyperlink field' or 'image field', Cell Header Field, Cell Footer Field, Horizontal align like 'center' or 'char' or 'justify' or 'left' or 'not set' or 'right' and then click on 'save' button to save the changed column details (see figure 5.12).

Create New Columns

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Reporting' option from the menu bar at the top of the screen.
- Step 3 Click 'Columns' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen.
- Step 4 Click on the link 'New' in the section heading 'Column Details New' of the columns wishes to edit.

Step 5 – Enter the column details like name, check or uncheck the option 'sortable', Field, Sort Expression,
 Number, Width, Format, Type like 'bound field' or 'checkbox field' or 'date field' or 'Hyperlink field' or 'image field', Cell Header Field, Cell Footer Field, Horizontal align like 'center' or 'char' or 'justify' or 'left' or 'not set' or 'right' and then click on 'save' button to save the new column details (see figure 5.12).

Friendship Public Charter School		ľ	Automated teport Coli	Inventory umn	y Support Sys	tem			Welcome
User Administration	Asset Item	Custodian	Maintenance	Reporting					Logout
Column Details									
	Name:		-			Sortable:			
	Field:					Sort Expression:			
	Number:					Width:			
	Format:					Type:	BoundField	-	
Cell I	Header Field:					Cell Footer Field:		-	-
Hor	izontal Align:	-							
				Save	Clear				

Figure 5.12 – Adding/Updating Columns

CONNECTIONSTRINGS

The 'Connection Strings' screen will provide the users the ability to View, Edit and Create connection string and the user has to enter the details like Connection type (SQL), check or uncheck the Trusted Check box, Server name, Database name, user id, User Password.

View Connection Strings

Step 1 – User logs into FPCS Inventory.

Step 2 – Hover over the 'Reporting' option from the menu bar at the top of the screen.

Step 3 – Click 'Connection strings' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen. A list of available connection strings are shown depending upon the source selected in the section heading 'Source Details' (see figure - 5.13)

User Administrati	n Asset Item Cu	ustodian	Maintenance	Reporting	Logo	ut	
> Reporting > Conne	tion Strings						
Source Details							
Source	Friendship Public Cha	arter School	•				
Connection String Details <u>New</u>							
			Connection	1 String			
initial catalog:					2	3	

Figure 5.13 – View Connection Strings

Edit Connection Strings

- Step 1 User logs into FPCS Inventory.
- Step 2 Hover over the 'Reporting' option from the menu bar at the top of the screen.
- Step 3 Click 'Connection strings' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen. A list of available connection strings are shown (see figure 5.13)
- Step 4 Select the source under the section head 'Source Details' and then click the connection string user intend to edit. Edit the details like Connection type (SQL), check or uncheck the Trusted Check box, Server name, Database name, user id, User Password and then click on 'save' button to save the changed settings (see figure 5.12).

Create New Connection String

Step 1 – User logs into FPCS Inventory.

- Step 2 Hover over the 'Reporting' option from the menu bar at the top of the screen.
- Step 3 Click 'Connection strings' from the drop-down list under the 'Reporting' option from the menu bar at the top of the screen. A list of available connection strings are shown if available (See figure 5.14)

Friendship Rublic Charter School	Automated Report Cor	I Inventory Support System nnection String	
			Welcome
User Administration Asset Item	Custodian Maintenance	Reporting	Logout
Connection String Details			
Ту	/pe: SQL Server -	Trusted	
Ser	ver:	Database:	
User	· Id:	Password:	
Connection Str	ing:		
		Save Clear	

Figure 5.14 – Adding/updating Connection String

- Step 4 Click on 'New' link in the section heading 'Connection String Details new' (see figure 5.13)
- Step 5 Enter new connection string details like Connection type (SQL), check or uncheck the Trusted Check box, Server name, Database name, user id, User Password and then click on 'save' button to save the new connection settings.