



## Overview Asset Management Changes 9.2

### Utilizing Mobile Devices

Users can utilize Android or IOS devices with internet capabilities for physical inventory transactions. Agencies must select between compatible mobile devices. Agencies will have to purchase approved devices and/or repurpose existing compatible devices. Current choices are: Tablets (IPad or Samsung, All-In-One Standalone Device, Smartphone. A Bluetooth enabled scanner is required for tablets and smartphones.

As well, users and agencies will have these capabilities:

- Users will be able to perform physical inventory transactions in Core-CT using the new Fluid User Interface in mobile devices.
- Users can generate a scan scope using a mobile device, for example for a certain location. The database would narrow down to all assets for that location. Then mobile device is used to capture information.
- Users can make updates to asset fields.
- Agencies can utilize a mobile device for entering a new asset. The asset would then be queued for approval prior to being officially added.

New devices will connect real time with data in asset repository, there will be no need to update or reconcile files.

*Note: For agencies utilizing the classic process (non-mobile device) for physical inventory purposes, the setup for the upload spreadsheet process will differ.*

### Physical Inventory Parameters

Start and end dates for physical inventory parameters are keyed based on the asset acquisition date. In the new process, the start and end date determine what assets are captured. It is important that the start and end date fall within the parameters of the acquisition date. For example, if a table was received 6/30 but start date is 7/1, the scope won't capture it.

## **New User Functionality**

- Split funding allocation will be available – users will be able to receive multiple funding sources for one asset.
- Asset consolidation and unitization will be available, making it easier for users to consolidate or unitize assets in a more streamlined manner.
- Active combo editing rules will facilitate valid ChartField entry. Users may get a warning or be stopped from proceeding if an erroneous entry is selected.
- Users can use the Transaction Reversals function to reverse a transaction. This automated process will remove the need for manual entries.

## **New Agency Functionality**

- Agencies will need to create all new occurrences – existing occurrences will no longer be used.