

Core-CT Finance Upgrade Project

National Property Management Association
Yankee Chapter Presentation

Core-CT Fluid User Interface (UI) – Asset Tracking

September 22, 2016

Agenda

- Introduction
- Oracle/PeopleSoft 9.2 Upgrade
- Asset Management Fluid User Interface
- Demonstration Video
- Presentation Recap



WELCOME

Agenda

▶ Introduction

- ▶ Oracle/PeopleSoft 9.2 Upgrade
- ▶ Asset Management Fluid User Interface
- ▶ Demonstration Video
- ▶ Presentation Recap

► Core-CT Introductions



Core-CT



- David Bonola
- Michael Carragher
- Tom Vaughan
- Tim Davidson
- Laura Zucker

Dave Bonola – Core-CT Asset Management Lead

Mike Carragher – Core-CT

Tim Davidson - Accenture

Agenda

- ▶ Introduction
- ▶ **Oracle/PeopleSoft 9.2 Upgrade**
- ▶ Asset Management Fluid User Interface
- ▶ Demonstration Video
- ▶ Presentation Recap

PeopleSoft 9.2

CoreCT

- ▶ Multiple “on going releases” without Upgrades
- ▶ Improved Efficiency
- ▶ Centralized Access to Data
- ▶ Many Enhancements
- ▶ Stay Current/Minimize Maintenance Costs
- ▶ Simpler and More Intuitive to Use (Fluid)

9.2 Asset Management Highlights

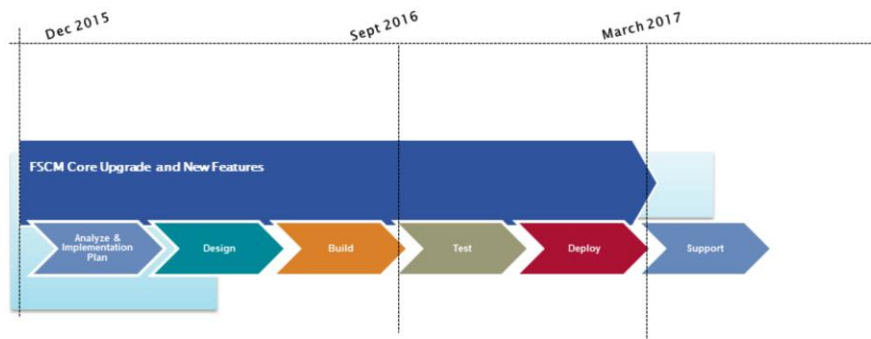
- ▶ **Fluid User Interface**
 - **Physical Inventory**
 - **Asset Tracking**
- ▶ Asset Management WorkCenter
- ▶ New Receipt Allocations for Multiple Chartfields
- ▶ Unitize/Consolidate Enhancements
- ▶ Transaction Reversals
- ▶ And More...

Discuss issues and concerns (we want to identify critical concerns/issues)
Not Training, Not Testing, Not a full Demonstration (show new delivered software capabilities)

We want you to actively share your opinions and ideas, this is not just a listening session

You have been asked to participate because of your expertise and experience. We want to maximize the delivered software capability with minimal modifications.
We want to identify process gaps and define impacts (i.e. Training, Policy, Security)

High Level Timeline



Agenda

- ▶ Introduction
- ▶ Oracle/PeopleSoft 9.2 Upgrade
- ▶ **Asset Management Fluid User Interface**
- ▶ Demonstration Video
- ▶ Presentation Recap

Fluid User Interface (UI)



- ▶ ***Fluid User Interface*** is a PeopleSoft function that is designed to run on mobile devices. By selecting a tile, a user can access an application page and perform routine tasks.
 - Fluid UI is ANYWHERE, ANYTIME access. New functionality designed for portable devices. The Asset Management Fluid User version is planned for release as part of PeopleSoft version 9.2 update. The display is optimized across Multiple Form Factors, that is both simple, intuitive and seamless for users.
- ▶ ***The Asset Tracking*** homepage is accessible from mobile devices/mobile scanning devices and provides connected, real time access to Asset Repository data.

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Fluid UI is ANYWHERE, ANYTIME access. New functionality designed for portable devices.

The Asset Management Fluid User version is planned for release as part of PeopleSoft version 9.2 update. The display is optimized across Multiple Form Factors, that is both simple, intuitive and seamless for users.

Interactive push based tiles reform navigation and maximize usability and productivity.

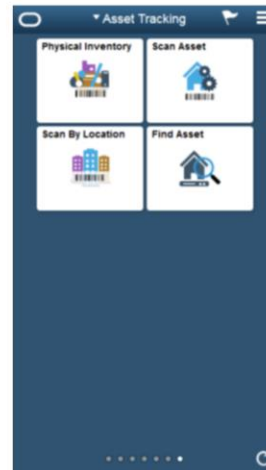
Fluid is designed to seamlessly co-exist with the Classic PeopleSoft as we know it.

Asset Management will be the first Core-CT module to adopt Fluid UI.

What is Fluid UI Asset Tracking?



- ▶ Ability to use a mobile device to:
 - Perform a Physical Inventory
 - Scan Assets by Location
 - Scan Assets
 - Find Assets
- ▶ Android and iOS
 - The new PeopleSoft Fluid User Interface version will only run on Android and Apple devices. This is a connected solution and does require cellular and/or Wi-Fi connectivity.



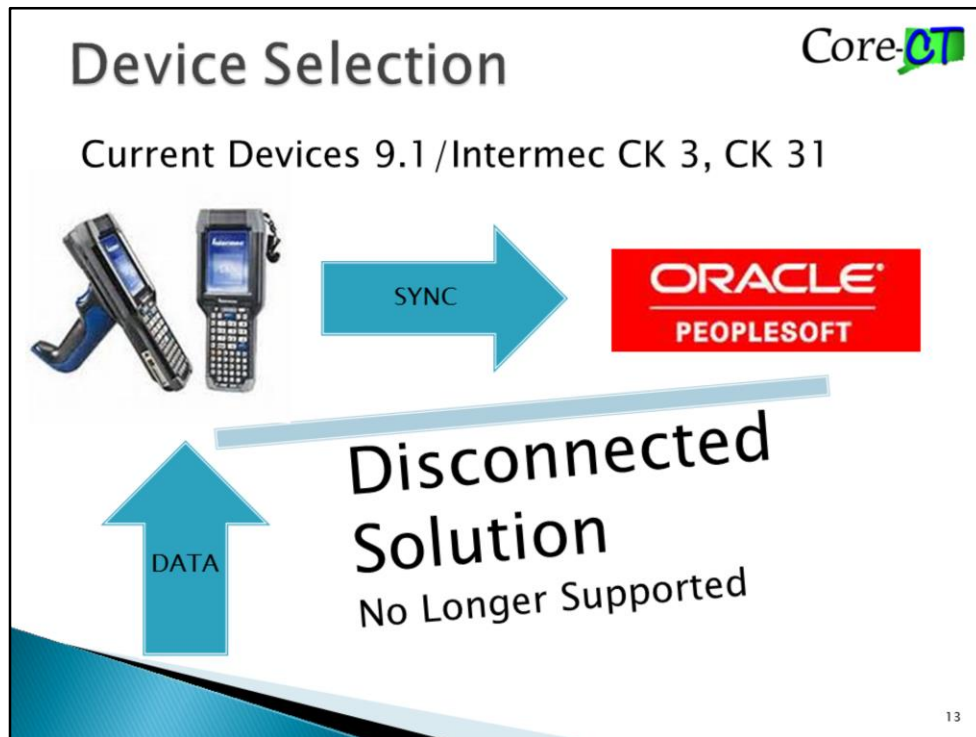
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The Fluid User Interface for Asset Tracking (delivered in PeopleSoft 9.2 Release), is PeopleSoft Asset Tracking Mobility on any Device. The new PeopleSoft Fluid User Interface version will only run on Android and Apple devices. This is a connected solution and does require cellular and/or Wi-Fi connectivity.

Device Selection

- Understanding what should be considered around Fluid Mobile Asset Tracking and device requirements
 - Users should consider what devices they plan to retire today as well as what devices they plan to use in the future.
- ✓ Current Devices 9.1
- ✓ Fluid Devices 9.2

Users should consider what devices they plan to retire today as well as what devices they plan to use in the future.



Our current 10 year old devices operate on a Windows Mobile Platform and are not supported by PeopleSoft Fluid.

Additionally, these older devices are no longer supported by Intermec (the manufacturer).

This was a disconnected solution that required data to be uploaded onto the device and then synced up and reconciled with Core-CT.

Device Selection

Core-CT

Fluid Devices 9.2 /IOS, Android



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The introduction of smart phones and tablet technology has started a mobile device revolution by changing users expectations and how they can access/update information in real time.

With Fluid UI, devices can now communicate (via Cellular and/or Wi-Fi) directly with the Asset Repository.

Device Selection

Multiple Device Types Can Be Used

- ☐ Rugged Standalone
 - ✓ Has Integrated Scanning
 - ✓ Higher Drop Zone Ratings
- ☐ Smartphones
 - ✓ Require 3rd Party Scanner
- ☐ Tablets
 - ✓ Require 3rd Party Scanner



There are essentially three device types that can be used.

Device Selection

Rugged Standalone Example Zebra/Symbol TC75 *



- Operating System – Android 4.4.3
- CPU – 1.7 GHZ Dual Core
- Keyboard – Virtual
- Drop Spec – 1.8m (6ft) to concrete (multiple)
- Sealing – IP67 (water/dust)
- Display 4.7 High Definition
- Dimensions – 6.3"H x 3.3"W x 1.1"D
- Weight – 13.3oz

* Currently available on State Contract #12PSX0308 (\$1819.54)

There are many rugged standalone devices that offer dedicated rugged dependability, but at a higher cost. No additional scanner is required. These devices can be purchased with Wi-Fi only or cellular and Wi-Fi combined.

Most of these dedicated devices have a virtual keyboard, but a few are available with an actual built-in keyboard.

Device Selection

Sled Interface Example

Honeywell Captuvo SL42 Sled for Apple Phone*



- Integrated High Volume Scanning
- Protective Housing
- Additional Power to the Device
- Drop Spec – 1.4m (4ft) to concrete (multiple)
- Run Time – 12 hours
- Lithium Ion Battery
- Dimensions – 6.5"H x 1.3"W x 3.1"D
- Weight – 7.94oz

* Currently available on State Contract #12PSX0308 (\$635.80)

A sled allows a smartphone protection and integrated scanning capability. Sleds act as the scanner and the case (all in one). They also offer additional power capability. Typically the sled needs to be matched to the exact smartphone (just like a case for an iPhone 5 would not fit an iPhone 6).

Device Selection

Sled Interface Example

Honeywell Captuvo SL62 Sled for Apple iPad *



- Integrated High Volume Scanning
- Protective Housing
- Additional Power to the Device
- Drop Spec – 1.4m (4ft) to concrete (multiple)
- Run Time – 8 hours
- Lithium Ion Battery
- Dimensions – 8.8"H x 6.0"W x 1.3"D
- Weight – 25.4oz

* Currently available on State Contract #12PSX0308 (\$644.47)

Sleds are also available for tablets.

Device Selection

Bluetooth Scanner Example

Motorola CS3070 Wireless Barcode Scanner *



- Wireless Scanning (connects to all Bluetooth enabled devices)
- Portable
- Bluetooth 2.1 EDR
- Drop Spec – 1.4m (4ft) to concrete (multiple)
- Run Time – 12 hours
- Lithium Ion Battery
- Dimensions – 0.9"H x 2.0"W x 3.4"D
- Weight – 2.47oz

* Currently available on State Contract #12PSX0308 (\$223.83)

An alternative to the sled is a wireless Bluetooth scanner. This option is the most cost effective. All of the mentioned device options are currently available on State Contract. Specifications and Contracts are always subject to change.

The wireless scanner can be used with any of the smartphones and/or tablets.

State Contract

The screenshot displays the State of Connecticut State Contracting Portal. The header features the state's name and the portal's title. A navigation bar includes links for Home, Biznet Menu, and Log In/Out. The main content area shows the search results for the contract number 12PSX0308, which is for Computer Peripherals. A table lists the contract details, including the start and expiration dates. The footer contains administrative information and links to the privacy policy and disclaimers.

State of Connecticut

STATE CONTRACTING PORTAL

Current User: Search Search Results Home Biznet Menu Log In/Out Results Detail

SCP Contract Results

State Contracting Portal Contract Search Results

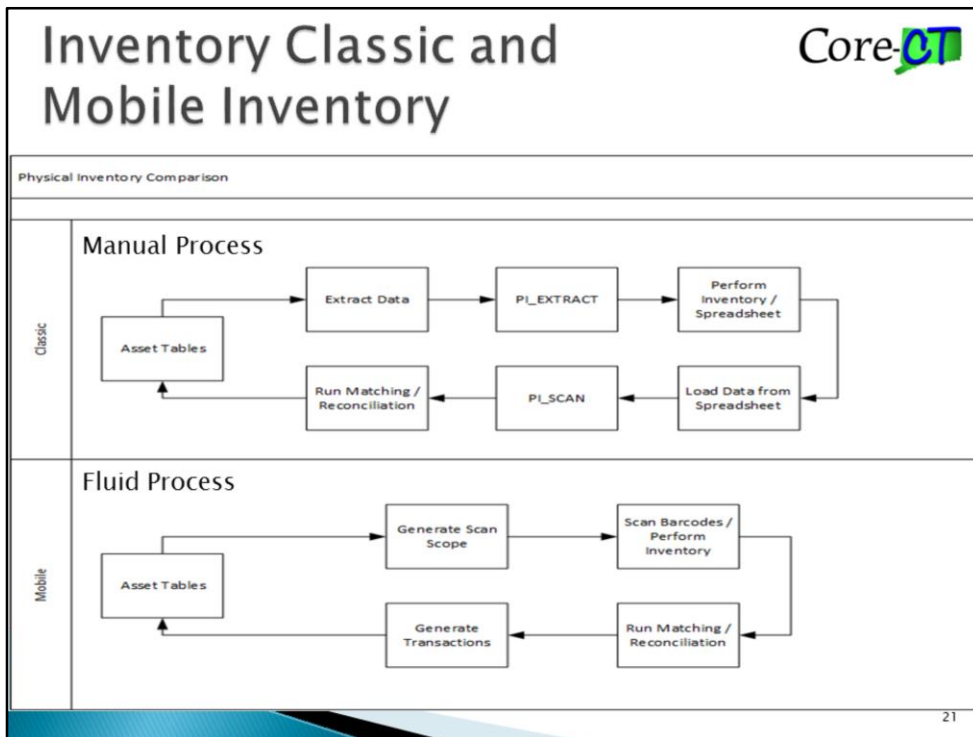
Search Criteria: Open Contracts and ContractNumber includes '12psx0308'

Total Results Found: 1

Contract #	Start Date	Expiration Date	Description
12PSX0308	12/06/2012	11/30/2017	Computer Peripherals

<< < 1 > >>

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Need to contact us? Send e-mail to [DAS Web Design](#)
All State [disclaimers and permissions](#) apply.



The Classic Physical Inventory method requires you to extract assets and generate an extract file, then load the file back into Asset Management.

The Mobile (Fluid UI) method does not require file downloads and uploads so there are fewer steps and opportunity for error.

The only supported disconnected method is Classic (used with spreadsheet upload).

Define Inventory Occurrence

- ▶ The start and end dates for the physical Inventory parameters are keyed from asset acquisition date.
- ▶ The beginning date must be less than or equal to the earliest asset acquisition date for a tagged asset.
- ▶ Only assets with an asset acquisition date within this date range will be included in the asset listing to be counted.

The Define Occurrence setup has now changed with an important emphasis on start and end dates. The Start and End dates can NOT be left blank.

Define Inventory Occurrence – Definition

Oracle
All Search Advanced Search Last Search Results

Definition Enter Criteria Transaction Defaults

Physical Inventory ID TESTINV *PI Name AM Test Inventory

Physical Inventory Parameters

*Business Unit US001 Book Name GASB

Start Date 01/01/1901
End Date 06/30/2016

Last Step 0 Initially Created

☒ Enable Mobile Inventory

Scan Scope

☒ Capital Assets Enter Criteria
☒ Non Capital Assets Enter Criteria
☐ Operating Lease Assets

Comments

Save Return to Search Previous in List Next in List Notify Add Update/Display

Definition | Enter Criteria | Transaction Defaults

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The new Occurrence is still setup on-line using the classic navigation. If the Enable Mobile Inventory box is NOT selected, then you would not be able to access the PI through the Fluid Interface.

Define Inventory Occurrence – Criteria

The screenshot shows the Oracle 'Define Inventory Occurrence - Criteria' form. The breadcrumb trail at the top reads: Favorites > Main Menu > Asset Management > Physical Inventory > Define Inventory Occurrence. The Oracle logo is in the top left, and a search bar with 'All' and 'Search' is in the top right. Below the breadcrumb trail are three tabs: 'Definition', 'Enter Criteria' (which is active), and 'Transaction Defaults'. The form displays 'Physical Inventory ID TESTINV' and 'AM TEST INVENTORY'. Under the 'Physical Inventory' section, 'Scan Scope Capital Assets' is selected. The 'Selection Criteria' section contains several fields, each with an equals sign in a dropdown menu and a search icon: 'Business Unit' (set to 'US001'), 'Asset Class', 'Asset Type', 'Asset Subtype', 'Asset Category', 'Total Cost', 'Department', 'Location Code' (set to 'In List' with a list of codes: 'US001, US002, US003, US016, US017'), and 'Asset Profile ID'.

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A great enhancement is the ability to enter strings of data. Currently in 9.1, you are required to insert new rows for each element. This is a substantial time saver.

Define Inventory Occurrence – Txn Defaults

Oracle EBS Interface

Navigation: Favorites ▾ Main Menu ▾ > Asset Management ▾ > Physical Inventory ▾ > Define Inventory Occurrence

Search: All ▾ Search

Physical Inventory ID: TESTINV AM TEST INVENTORY

Definition	Enter Criteria	Transaction Defaults
Auto Approval		
<input checked="" type="checkbox"/> Approve		
Transactions Enabled		
<input checked="" type="checkbox"/> Non-Financial Adds		
<input checked="" type="checkbox"/> Physical Asset Changes		
<input checked="" type="checkbox"/> Asset Updates		
<input type="checkbox"/> Transfers		
<input type="checkbox"/> Non Capital Transfer		
<input type="checkbox"/> Operating Lease Transfer		
Transaction Defaults		
*Transaction Date: 02/22/2016		
*Accounting Date: 02/22/2016		
Transaction Code:		
*Transfer convention: AM		
Retirement Defaults		
*Disposal Code: Retirement by Sale		
*Retirement Convention: FM		
*Retire Option: Calculate Gain/Loss		
Voluntary Conversion		
<input checked="" type="radio"/> Voluntary Conversion		
<input type="radio"/> Involuntary		

The Default Tab has not changed

Load/Match/Reconcile

Navigation: Favorites ▾ Main Menu ▾ > Asset Management ▾ > Physical Inventory ▾ > Load/Match/Reconcile PI Info ⓘ

ORACLE® All ▾ Search

Physical Inventory

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

▼ Search Criteria

Run Control ID: begins with ▾ PI_LOAD x

☐ Case Sensitive

Search Clear Basic Search ⓘ Save Search Criteria

Search Results

View All First 1-2 of 2 Last

Run Control ID
PI_LOAD
Run_Inventory_Rpts

Selecting a Run Control for Load/Match/Reconcile

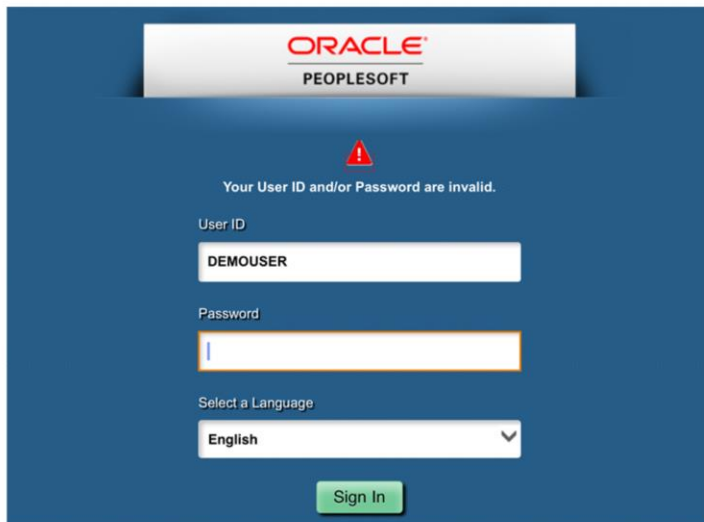
Generate Scan Scope

The screenshot displays the Oracle 'Load/Match/Reconcile PI Info' interface. At the top, a breadcrumb trail shows the navigation path: Favorites > Main Menu > Asset Management > Physical Inventory > Load/Match/Reconcile PI Info. Below this is the Oracle logo and a search bar. The main section is titled 'Load/Match/Reconcile PI Info' and features a progress bar with four steps: 'Generate Scan Scope' (active), 'Generate Results', 'Generate Transactions', and 'Delete Data'. Navigation buttons for 'Previous' and 'Next' are located to the right of the progress bar. Below the progress bar, the text 'Generate Scan Scope - Step 1 of 4' is displayed. The interface includes a 'Run Control ID' field with the value 'PI_LOAD', and links for 'Report Manager' and 'Process Monitor'. A 'Run' button is also present. A search bar for 'Physical Inventory ID' contains the text 'TESTINV', with a magnifying glass icon and the text 'AM TEST INVENTORY' to its right. Below the search bar, the text 'Last PI Step Executed 4 Transactions Loaded' is shown. At the bottom right, there are 'Previous' and 'Next' navigation buttons.

The new Fluid Mobile version of Load/Match/Reconcile (accessed on-line) is now streamlined with the Train Stops (four steps).

PeopleSoft Login Page

CoreCT



The screenshot displays the Oracle PeopleSoft login interface. At the top, the Oracle logo and 'PEOPLESFT' text are visible. Below this, a red warning triangle icon is shown above the message 'Your User ID and/or Password are invalid.' The 'User ID' field contains the text 'DEMOUSER'. The 'Password' field is empty and highlighted with an orange border. Below the password field is a 'Select a Language' dropdown menu currently set to 'English'. A green 'Sign In' button is located at the bottom of the form.

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The Fluid PeopleSoft logon page is accessed directly on the device (through your Web Browser).

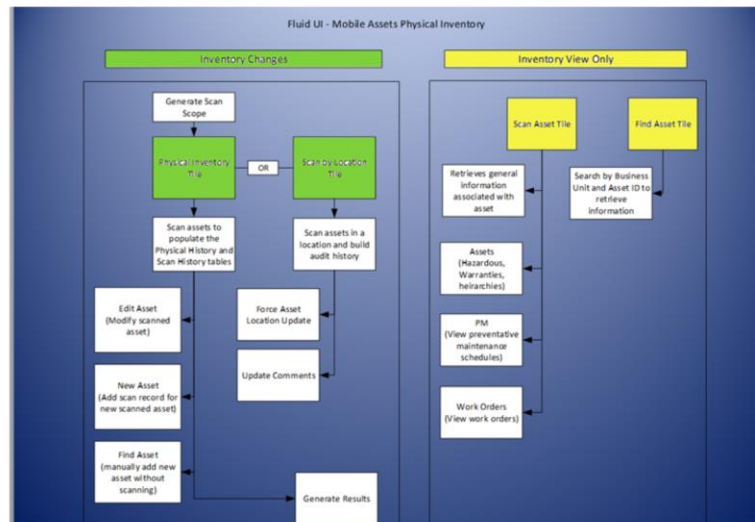
Fluid UI – Asset Tracking

Core-CT



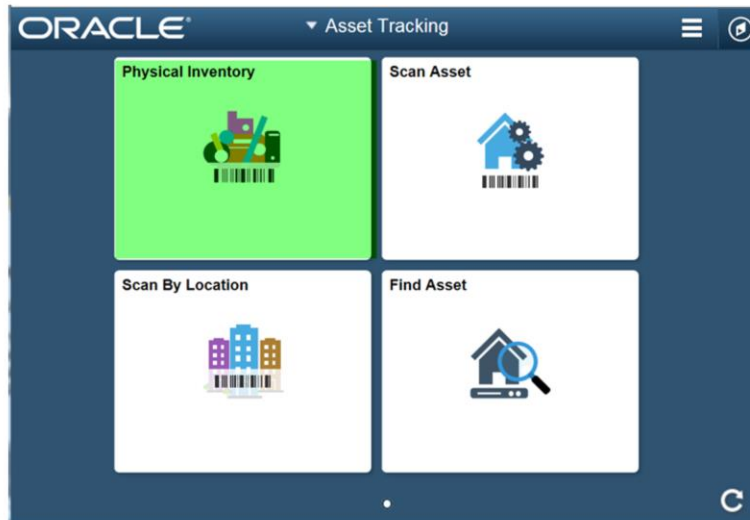
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The Fluid Homepage collects related information and displays tiles that provide access to fluid applications. Access to a particular tile is specific by role. The Asset Tracking homepage is accessible from mobile devices and provides connected, real time access to Asset Repository data.



Physical Inventory Tile

CoreCT

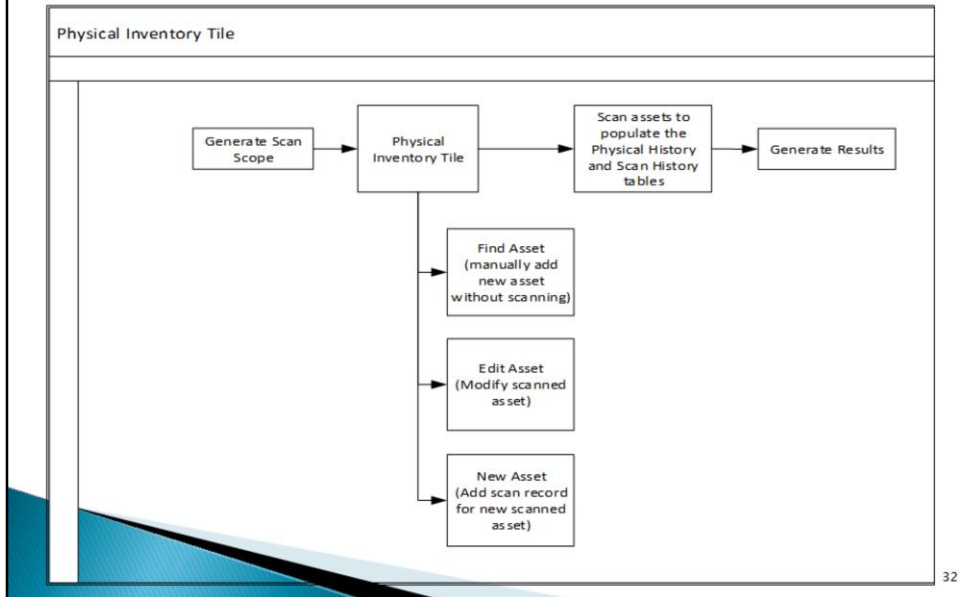


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The Physical Inventory tile is used to perform mobile physical inventory, scan assets, retrieve/display asset information directly from the Asset Repository. You can also edit scanned asset information or manually add a new scanned asset.

This is the only tile related to a Physical Inventory Occurrence (PI ID).

Physical Inventory Flowchart



This illustrates the process flow for the Physical Inventory tile.

New Role

Agency Asset Scanner (Physical Inventory)

CT_F_A_PHYS_INVENT_SCNR

<p>Responsible for using Fluid UI Mobile Asset Physical Inventory functionality to perform an inventory using a mobile device, such as a cell phone or a tablet.</p> <p>Permissions CT_F_A_PHYS_INVENT_SCNR CTAGYASSETVIEWER</p>	<p>Tasks:</p> <ul style="list-style-type: none">• Electronically scans Asset Tags• Manually Confirms Asset Tags• Edits Scan Records• Updates physical asset information• Reviews All, Scanned, Remaining Assets• Stages new Assets• Sends mobile e-mail notifications• Populates Physical Inventory Interface• Populates Scan History
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Physical Inventory

- ▶ There are three ways to count an asset:
 - Electronic scan of bar code tag
 - Manually confirm the asset using the find an asset menu
 - Stage new asset

Physical Inventory

CoreCT

[< My Homepage](#) **Physical Inventory**

PI ID

TESTINV

Q

PI Name

AM TEST INVENTORY

Scan Location

Q

Done

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To perform a Physical Inventory, you need to select an existing PI ID. The optional Scan Location field allows you to update the scanned assets location automatically. In this example, we are going to leave the Scan Location blank.

Physical Inventory Asset Listing – Scan Scope

CoreCT

Back

Physical Inventory

TEST INVENTORY

All (52)

Scanned (23)

Remaining (29)

Location

52 rows

1004

Non-Capital Asset

Serial ID

Location US017

Scanned On 02/26/16 1:52:54PM

1003

Non-Capital Asset

Serial ID

Location US017

Scanned On 02/26/16 1:52:36PM

1002

Non-Capital Asset

Serial ID

Location US017

Scanned On 02/26/16 1:52:29PM

1011

Non-Capital Asset

Serial ID

Location US017

1014

Non-Capital Asset

Serial ID

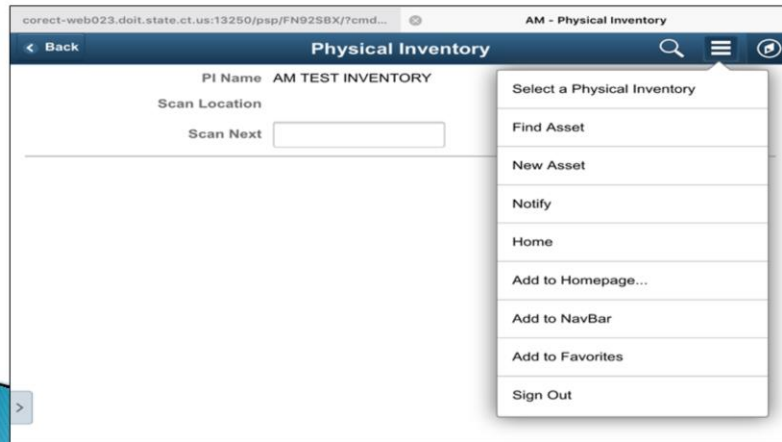
Location US017

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We can view all of the assets that are part of the Scan Scope. Also, there are additional tabs to display assets that have been scanned and that are remaining to be scanned.

Physical Inventory

- ▶ Scan an asset using the find the asset menu selection and the Manual Confirm button.
- ▶ Select the Find an Asset button



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This option allows you to manually capture an asset without physically scanning it.

Physical Inventory

- ▶ Click on the magnifying glass search icon for Tag

The screenshot shows a web application interface for 'Physical Inventory'. At the top, there's a navigation bar with a back arrow, the title 'Physical Inventory', and icons for search, menu, and user profile. Below the navigation bar, there's a section titled 'Search Criteria' with a dropdown arrow. This section contains several input fields: 'Unit' (with 'US001' entered), 'Asset ID', 'Tag', 'Serial ID', 'Mfg Name', and 'Model'. Each field has a magnifying glass icon to its right. Below these fields are 'Search' and 'Clear' buttons. Underneath the search criteria is a section titled 'Search Results' with a dropdown arrow. The main content area on the right is titled 'Search for an asset' and is currently empty. The browser's address bar at the top shows a URL from 'corect-web023.doit.state.ct.us'.

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You can search using various filters.

Physical Inventory

Select the asset record that needs to be scanned

corect-web023.doit.state.ct.us:13250/psp/FN925BX/7cmd... AM - Physical Inventory

Cancel Lookup

Search for: Tag

Search Criteria

Search Results

300 rows

Tag Number	Serial ID	Asset Identification	Description
000000000153		000000000153	LINE1
000000000154		000000000154	LINE1
000000000155		000000000155	LINE2
000000000156		000000000156	Split Funded
000000000204		000000000204	OLD ASSET NCP
000000000205		000000000205	OLD ASSET CAP

Physical Inventory

Click on the Search Button

The screenshot shows a web application interface for 'Physical Inventory'. The browser's address bar displays 'corect-web023.doit.state.ct.us:13250/psp/FN925BX/?cmd...'. The page title is 'AM - Physical Inventory'. The interface features a dark blue header with a back arrow, the title 'Physical Inventory', and icons for search, menu, and refresh. Below the header, there is a 'Search Criteria' section with a dropdown arrow. This section contains several input fields, each with a magnifying glass icon: 'Unit' (containing 'US001'), 'Asset ID', 'Tag' (containing '000000000211'), 'Serial ID', 'Mfg Name', and 'Model'. Below these fields are two buttons: a green 'Search' button and a grey 'Clear' button. Below the search criteria is a 'Search Results' section, also with a dropdown arrow. The main content area to the right of the search criteria is titled 'Search for an asset' and is currently empty. A small blue arrow icon is visible at the bottom right of the search results section.

Physical Inventory

Click on the Asset in the Search Results

The screenshot displays a web application interface for 'Physical Inventory'. The top navigation bar includes a back arrow, the title 'Physical Inventory', and icons for search, menu, and refresh. Below the navigation bar, there are two main sections: 'Search Criteria' and 'Search Results'. The 'Search Results' section shows '1 rows' and a table with one row of data. The data row contains the following information: '000000000211', 'CAP', 'Asset ID: 000000000211', 'Serial ID', 'Mfg Name', and 'Model'. A right arrow icon is visible next to the 'Asset ID' field. The interface is designed with a clean, modern look using a blue and white color scheme.

Asset ID	Serial ID	Mfg Name	Model
000000000211			

Physical Inventory

Click on the Confirm Manual Scan to scan the asset

The screenshot shows a web browser window with the URL `corect-web023.doit.state.ct.us:13250/psp/FN925BX/7cmd...` and the page title `AM - Physical Inventory`. The application header includes a back arrow, the text `Physical Inventory`, a search icon, a menu icon, and a refresh icon. The main content area displays the following information:

- Confirm To PI ID: TESTINV
- PI Name: AM TEST INVENTORY
- Unit: US001
- Asset ID: 000000000211
- Tag: 000000000211
- Serial ID
- Description: CAP
- Asset Status: In Service
- Location Code: US013
- Mfg Name
- Model
- Dept ID
- Department
- Custodian
- Empl ID

A green button labeled `Confirm Manual Scan` is positioned to the right of the Unit field. A small grey button with a right arrow is located at the bottom left of the form area.

Physical Inventory

The asset with the asset tag has now been scanned. Click on Edit if any changes need to be made.

The screenshot shows a web application interface titled "Physical Inventory". At the top, there is a header bar with a "Back" button, the title "Physical Inventory", and icons for search, menu, and user profile. Below the header, the form displays the following information:

- PI Name: AM TEST INVENTORY
- Scan Location: (empty field)
- Scan Next: (empty field)
- Unit: US001
- Asset ID: 000000000211
- Tag: 000000000211
- Serial ID: (empty field)
- Description: CAP
- Asset Status: In Service
- Location Code: US013
- Location: USA - Vermont
- Mfg Name: (empty field)
- Model: (empty field)
- Department ID: (empty field)
- Department: (empty field)

An "Edit" button is located to the right of the Unit field. A blue arrow icon is visible on the left side of the form.

Physical Inventory

Make any changes and click Done.

The screenshot shows a mobile application interface for 'Physical Inventory'. At the top, there is a header bar with a back arrow, the title 'Physical Inventory', and search and menu icons. Below the header, a sub-header reads 'PI Name: AM TEST INVENTORY'. The main content area is titled 'Edit Scan Record' and contains the following fields and controls:

- Unit:** US001
- Asset ID:** 000000000211
- Retire Asset:** A toggle switch set to 'No'.
- Tag:** 000000000211
- Serial ID:** An input field with a magnifying glass icon.
- Description:** CAP
- Location Code:** US013
- Mfg Name:** An input field with a magnifying glass icon.
- Model:** An input field with a magnifying glass icon.
- Dept ID:** An input field with a magnifying glass icon.
- Custodian:** An input field.
- Empl ID:** An input field with a magnifying glass icon.
- Scan Date:** 02/29/2016 12:20:41PM
- Scanned By:** DEMOUSER
- Comments:** A text area containing the text 'Test find asset scanned'.

At the top left of the form is a 'Cancel' button, and at the top right is a green 'Done' button.

Physical Inventory New Asset

Physical Inventory

PI Name AM TEST INVENTORY

Scan Location

Scan Value

Select a Physical Inventory

Find Asset

New Asset

Notify

Home

Add to Homepage...

Add to NavBar

Add to Favorites

Sign Out

Physical Inventory New Asset

The screenshot shows a mobile application interface for entering a new asset scan record. The main window is titled 'Physical Inventory' and contains a sub-form titled 'New Asset Scan Record'. The sub-form has a 'Cancel' button on the left and a 'Done' button on the right. The 'PI Name' field is pre-filled with 'AM TEST INVENTORY'. Below this, there are several input fields for asset details: 'Unit' (pre-filled with 'US001'), 'Asset ID' (pre-filled with 'NEXT'), 'Tag' (pre-filled with 'TAGTEST'), 'Serial ID' (empty), 'Description' (pre-filled with 'Test new asset'), 'Location' (pre-filled with 'US002'), 'Area ID' (empty), 'Mfg Name' (empty), and 'Model' (empty). Each of the 'Unit', 'Location', 'Area ID', 'Mfg Name', and 'Model' fields has a magnifying glass icon to its right, indicating a search function. The background of the application shows a list of other inventory items.

Field	Value
PI Name	AM TEST INVENTORY
Unit	US001
Asset ID	NEXT
Tag	TAGTEST
Serial ID	
Description	Test new asset
Location	US002
Area ID	
Mfg Name	
Model	

Physical Inventory New Asset

< BackPhysical Inventory🔍☰📄

W Name: AM TEST INVENTORY

New asset scan record created and marked for review.

×

Scan Location

Scan Value

Unit US001

Asset ID NEXT

Tag TAGTEST

Serial ID

Description Test new asset

Asset Status

Location Code US002

Location USA - New Jersey

Mfg Name

Model

Department ID

Department

Custodian

Empl ID

Scan Date 03/03/2016 2:44:33PM

Scanned By Emplid DEMOUSER

Scanned By Schumacher,Kenneth

Scan Type New

Edit

>

Generate Results

Oracle EBS Load/Match/Reconcile PI Info

Generate Scan Scope **Generate Results** Generate Transactions Delete Data

Generate Results - Step 2 of 4

Run Control ID Run_Inventory_Rpts Report Manager Process Monitor Run

Physical Inventory ID ?

Physical Inventory ID P1 Fluid UI 1

Last PI Step Executed 1 Generate Scan Scope Executed

Generate Results ?

Generate Results will allow you to match that data to the current PS/AM data to help your reconciliation process.

Remaining Processes

1. Verify Duplicate Tags
2. Verify Duplicate Serial Numbers
3. Review Scanned Data
4. Generate Transactions

Scan by Location Tile

CoreCT

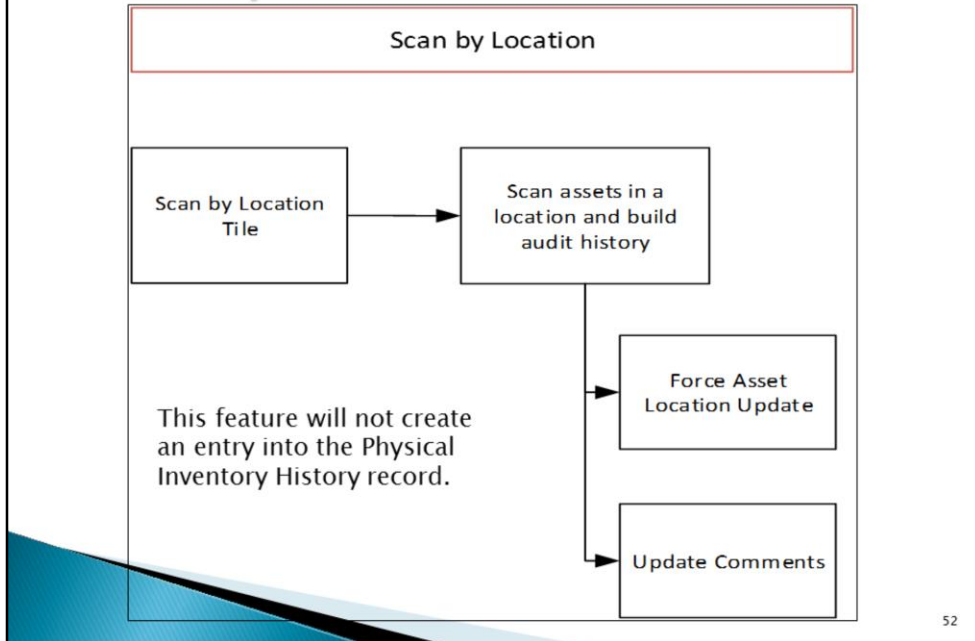


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What is Scan by Location? CoreCT

- ▶ Updates Asset Tables immediately
- ▶ Does not require generate scan or generate results
- ▶ Effective dated rows

Scan by Location Tile



This feature will not create an entry into the Physical Inventory History record.

Scan by Location

- ▶ Enter the location to be scanned, make sure Force Asset Location Update is set to Yes, and then click on Done.
- ▶ This creates a scope for all the tagged assets in this location, and updates the location, if different, on each asset scanned.

Scan by Location

[← My Homepage](#)

Select Scan Location

Search

Scan Location

US002

Description

USA - New Jersey

Force Asset Location Update

Yes

Done

Scan by Location

Enter the tag number of the asset. This tag number is for an asset in a different location, US001.



The screenshot shows a mobile application interface titled "Scan By Location". At the top, there is a navigation bar with a back arrow, the text "Select Scan Location", and the title "Scan By Location". To the right of the title are icons for search, a flag, a menu, and a user profile. Below the navigation bar, the interface displays the following fields:

- "Scan Location" with the value "USA - New Jersey".
- "Force Asset Location Update" with the value "Yes".
- "Scan Value" with a text input field containing the number "0128".

Below these fields is a large, empty rectangular area, likely for a list of results or a detailed view.

Scan by Location

Because the Force Asset Change selection is active this asset will change locations.

Select Scan Location

Scan By Location

Search

Filter

Menu

Profile

Scan Location

USA - New Jersey

Force Asset Location Update

Yes

Scan Value

Unit

US001

Edit Comments

Asset ID

000000000094

Tag

0128

Serial ID

Description

High Speed Copier

Asset Status

In Service

Location Code

Location Change

US002

Location

USA - New Jersey

Old Location Code

US001

Old Location

USA - New York

Mfg Name

Model

Dept ID

13000

Department

Finance

Custodian

Empl ID

Scan Date

03/02/2016 9:29:27AM

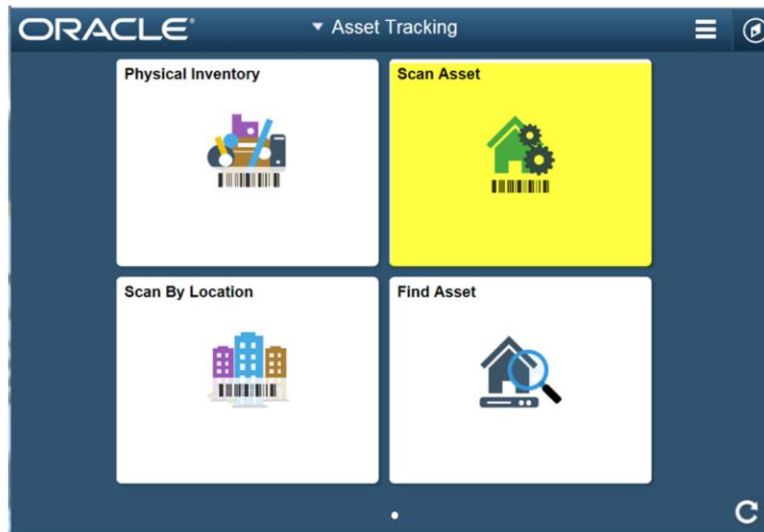
Scanned By

Schumacher,Kenneth

Comments

Scan Asset Tile

CoreCT



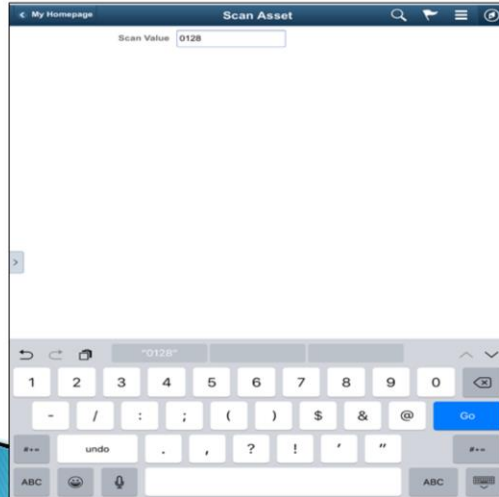
57

What is Scan Asset?

- ▶ Use the Scan Asset page to retrieve general information, preventative maintenance schedules, and work orders associated with the scanned asset.
- ▶ Asset information displayed on this page is retrieved from Asset Repository.

Scan Asset

Enter the tag number of the asset to be scanned and click on 'Go'.



The screenshot shows a mobile application interface titled "Scan Asset". At the top, there is a navigation bar with a back arrow, "My Homepage", and the title "Scan Asset". Below the navigation bar, there is a text input field labeled "Scan Value" containing the number "0128". To the right of the input field is a blue button labeled "Go". Below the input field, there is a large empty rectangular area. At the bottom of the screen, a virtual keyboard is visible, showing numbers 1-0, punctuation, and a "Go" button. The keyboard also includes "undo", "redo", and "ABC" buttons.

Scan Asset

< My Homepage

Scan Asset

Search

Filter

Menu

Refresh

Scan Value

Assets

PMs

Work Orders

Unit

US001

Asset ID

000000000091

Tag

0127

Serial ID

Description

Automobile

Asset Status

In Service

Location Code

US001

Location

USA - New York

Area ID

Area

Mfg Name

Model

Product Version

Production Date

Dept ID

Department

Custodian Deptid

Custodian Department

Custodian

Empl ID

Asset Type

Fleet

Asset Subtype

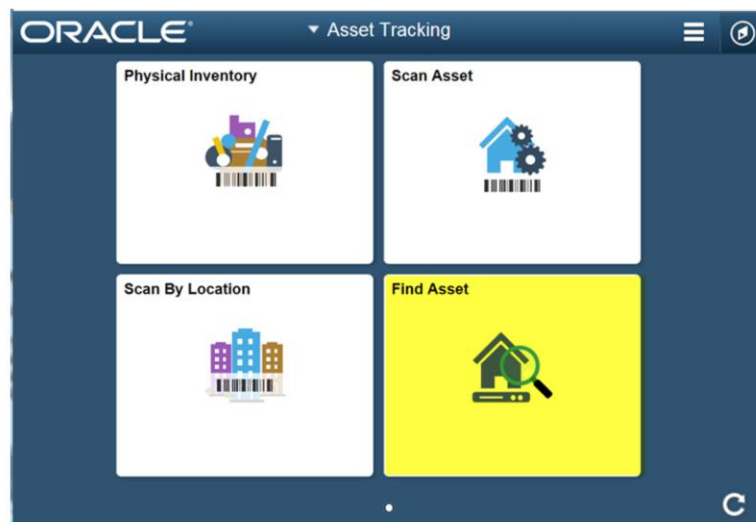
In Service Date

IP Alias

IP Address

Find Asset Tile

CoreCT



What is Find Asset?

- ▶ Use the Find Asset page to retrieve information for assets without scanning a barcode.
- ▶ Enter search parameters, such as Business Unit and Asset ID, and tap Search to retrieve information for scanned assets.
- ▶ Asset information displayed on this page is retrieved from the Asset Repository.

Find Asset Tile

Enter any of the details for the search window to retrieve the asset details.

The screenshot shows a web application interface for finding assets. It features a sidebar on the left with a 'Search Criteria' section containing input fields for Unit (pre-filled with 'US001'), Asset ID, Tag, Serial ID, Mfg Name, and Model. Each field has a magnifying glass icon. Below these fields are 'Search' and 'Clear' buttons. The 'Search Results' section is currently empty. The main content area on the right is titled 'Search for an asset' and is also empty.

Search Criteria	
Unit	US001
Asset ID	
Tag	
Serial ID	
Mfg Name	
Model	

Search **Clear**

Search Results

Search for an asset

Find Asset Tile

Cancel

Lookup

Search for: Tag

Search Criteria




Search Results

300 rows

Tag Number	Serial ID	Asset Identification	Description
000000000153		000000000153	LINE1
000000000154		000000000154	LINE1
000000000155		000000000155	LINE2
000000000156		000000000156	Split Funded
0123	000000000001	000000000001	SOLARIS WORKSTATION
0124	123456	000000000089	High Speed Copier
0125		000000000090	Copier, High Speed Color
0127		000000000091	Automobile
0128		000000000094	High Speed Copier
0129		000000000095	High Speed Copier
0130		000000000096	High Speed Copier
0131	SAMOPLEASE	000000000097	Sample data for Oper Lease
0132		000000000098	
01999		000000000092	High Speed Copier
HVAC00000002		MMFACLT0002	40 Ton HVAC Conditioner
ITTAG122	CDHL F11	ITZ122	Dell Latitude C400

Find Asset Tile

[< My Homepage](#)[Find Asset](#)



Unit	US001
Asset ID	000000000094
Tag	0128
Serial ID	
Description	High Speed Copier
Asset Status	In Service
Location Code	US001
Location	USA - New York
Area ID	
Area	
Mfg Name	
Model	
Department ID	13000
Department	Finance
Custodian Deptid	
Custodian Department	
Custodian	
Empl ID	
IP Alias	
IP Address	

[>](#)

Agenda

- ▶ Introduction
- ▶ Oracle/PeopleSoft 9.2 Upgrade
- ▶ Asset Management Fluid User Interface
- ▶ **Demonstration Video**
- ▶ Presentation Recap

Demonstration Video

Core 

- ▶ <https://www.youtube.com/watch?v=brOXboB1qRg>

Action Items

- ▶ Agencies will need to request Fluid Access
- ▶ Submit Help Desk Ticket
- ▶ Deadline December 1, 2016
- ▶ Agencies meeting the deadline will be included in the Fluid Training sessions
- ▶ If an agency decides to do Fluid after the December 1st deadline, they will go on a waiting list for training after March, 2017

Presentation Recap

- ▶ Questions
- ▶ Action Items