Core-CT Finance Upgrade Project

National Property Management Association
Yankee Chapter Presentation

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

September 22, 2016

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Agenda

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

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Core-CT

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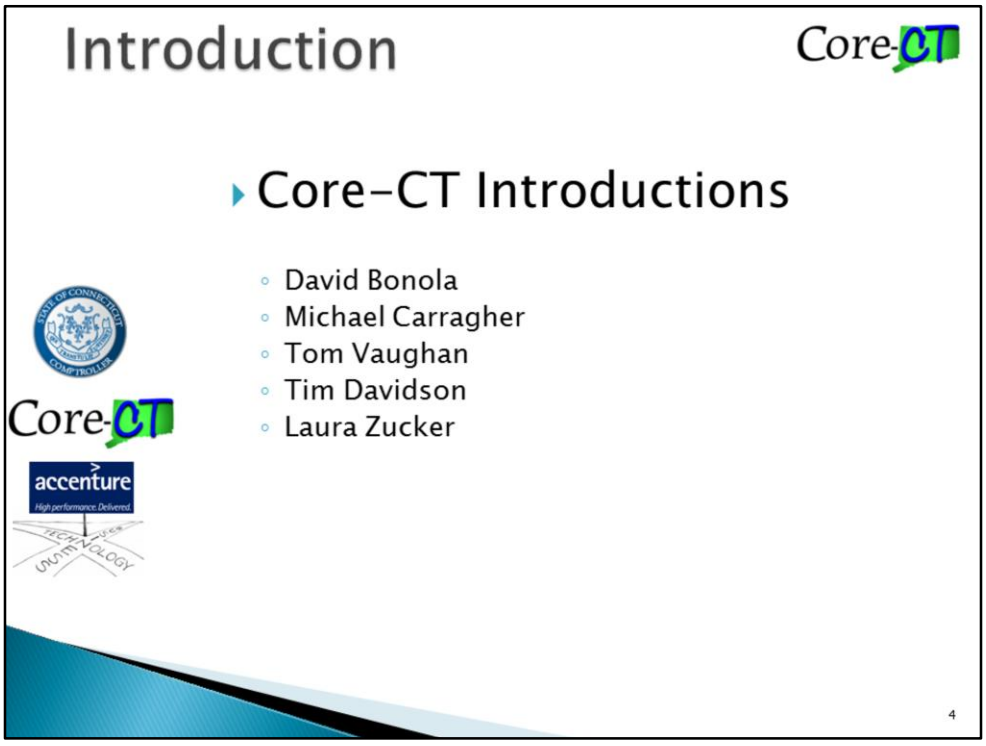

Dave Bonola – Core-CT Asset Management Lead
Mike Carragher – Core-CT
Tim Davidson - Accenture

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PeopleSoft 9.2

Core-CT

- 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)

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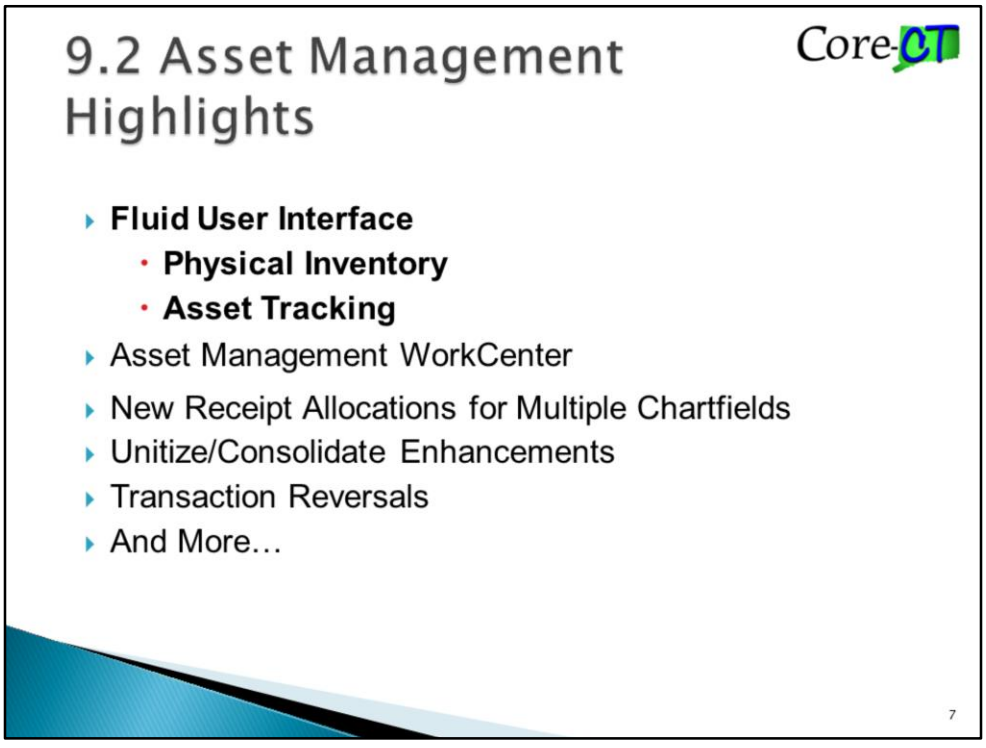
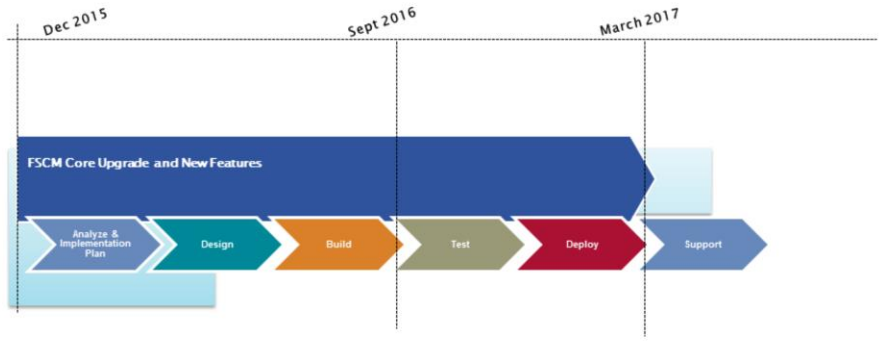


Discuss issues and concerns (we want to identify critical concerns/issues)
Not Training, Not Testing, Not a full Demonstration (show new delivered software capabilities)

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



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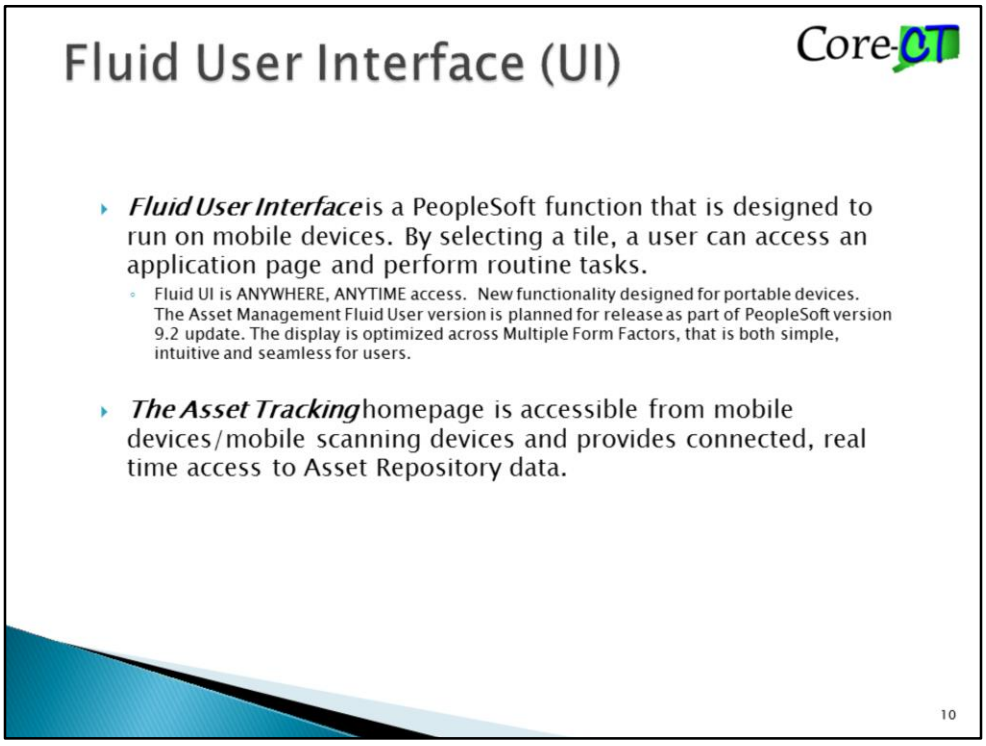
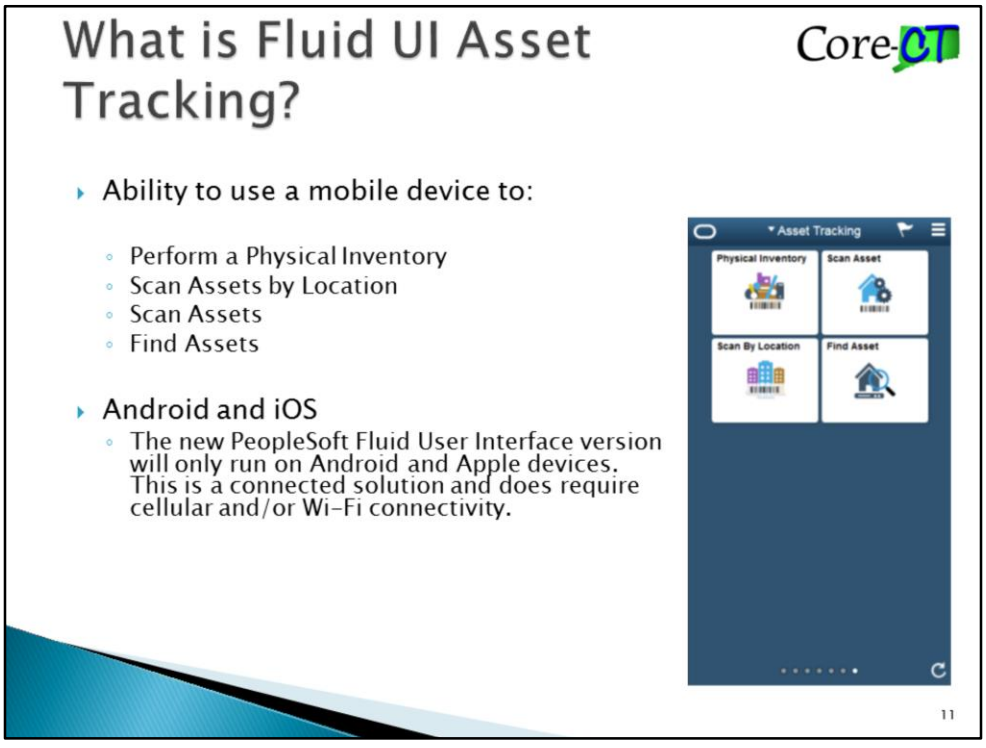


Fluid UI is ANYWHERE, ANYTIME access. New functionality designed for portable devices.
The Asset Management Fluid User version is planned for release as part of PeopleSoft version 9.2 update. The display is optimized across Multiple Form Factors, that is both simple, intuitive and seamless for users.

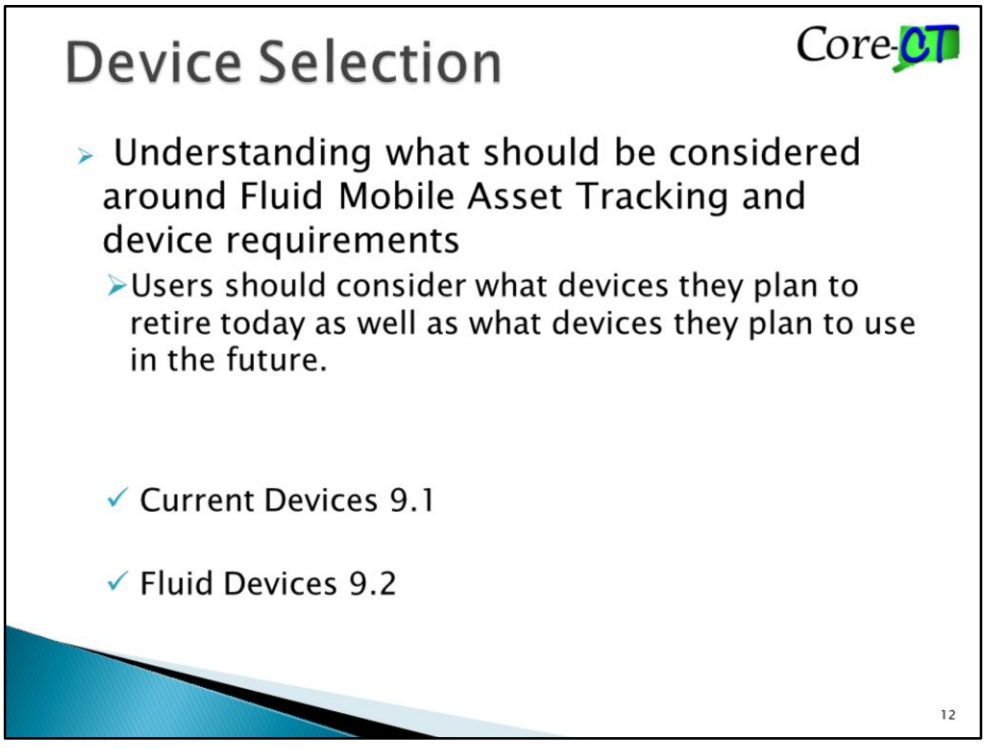
Interactive push based tiles reform navigation and maximize usability and productivity.

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

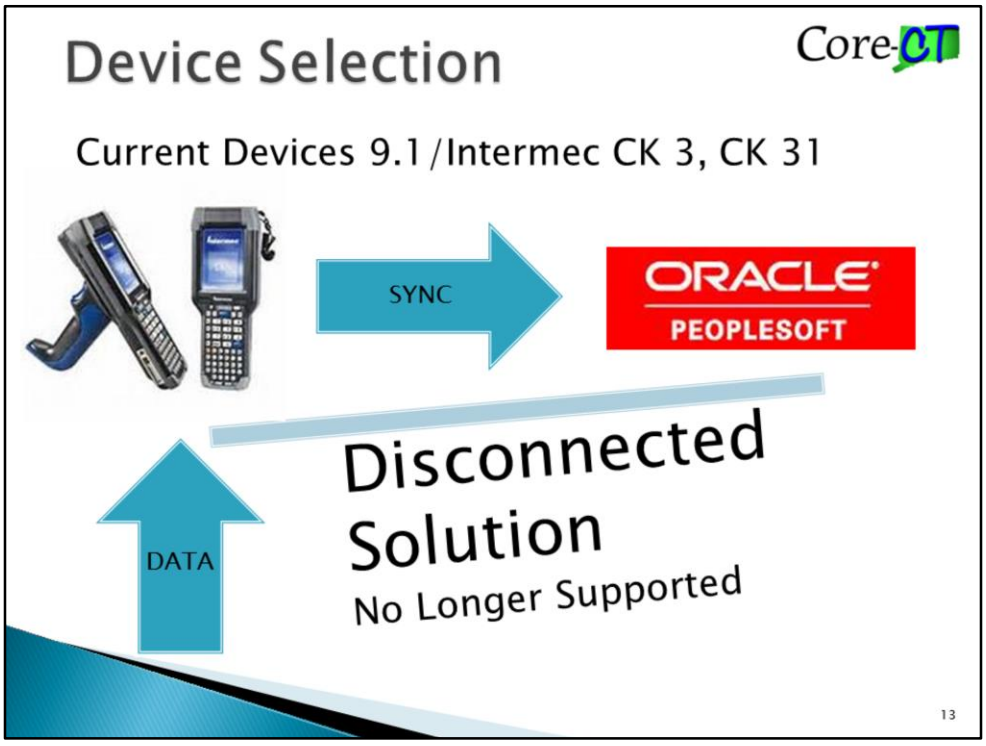
Asset Management will be the first Core-CT module to adopt Fluid UI.



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.

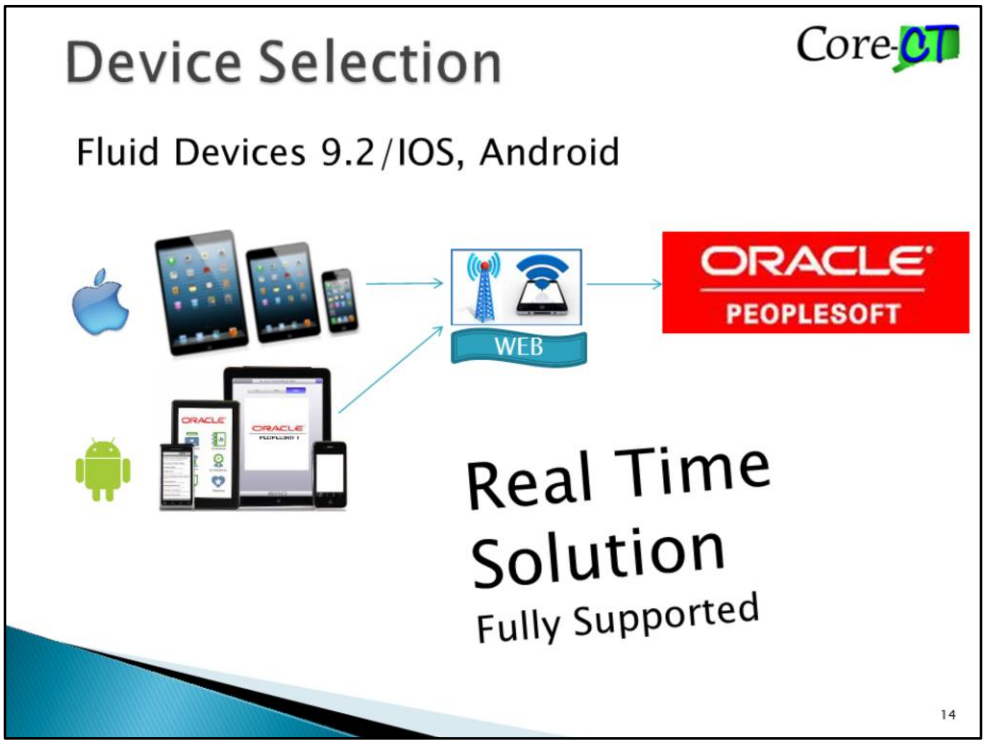


Users should consider what devices they plan to retire today as well as what devices they plan to use in the future.



Our current 10 year old devises 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.



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

Core-CT

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

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There are essentially three devise types that can be used.

Device Selection

Core-CT

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)

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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

Core-CT

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)

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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

Core-CT

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)

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Sleds are also available for tablets.

Device Selection

Core-CT

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)

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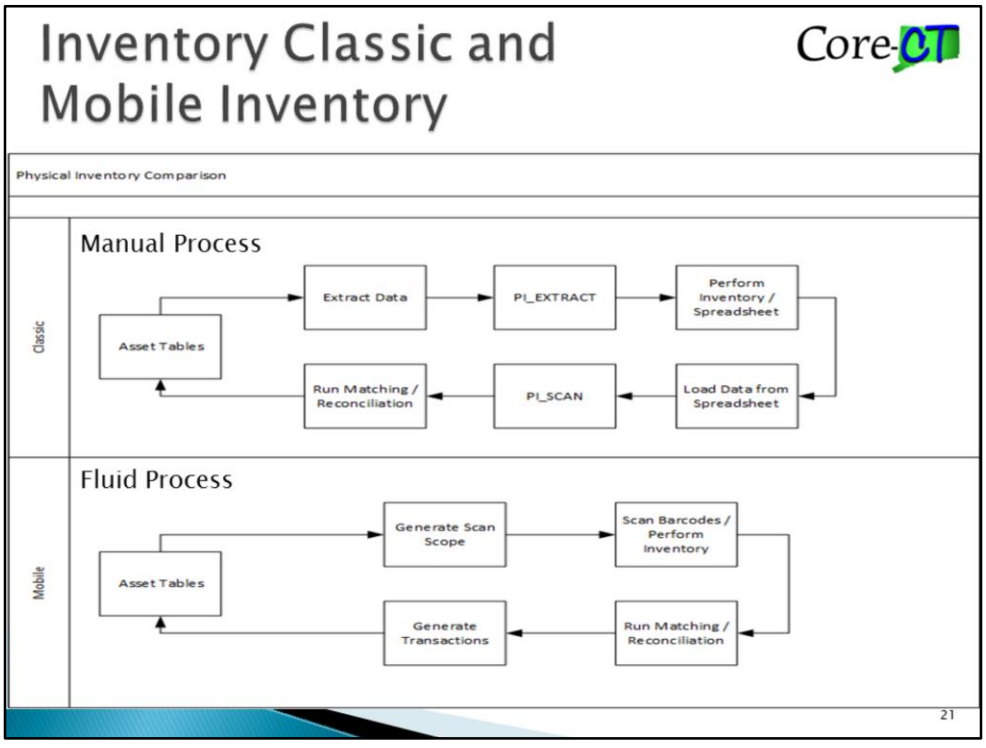
An alternative to the sled is a wireless Bluetooth scanner. This option is the most cost effective. All of the mentioned device options are currently available on State Contract. Specifications and Contracts are always subject to change.

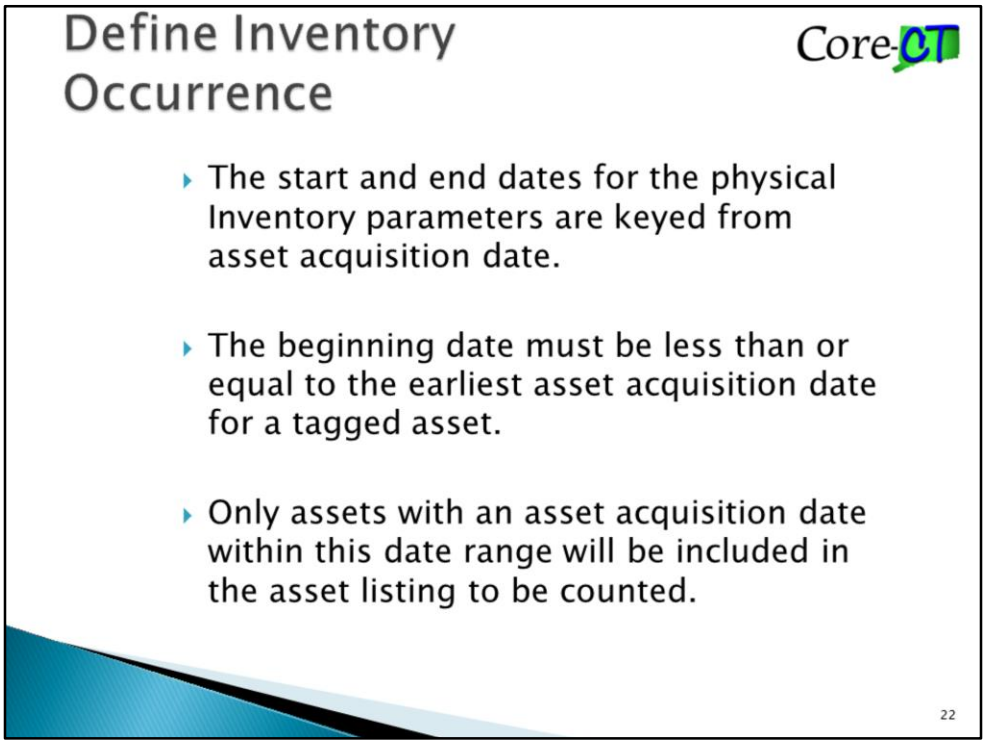
The wireless scanner can be used with any of the smartphones and/or tablets.

State Contract

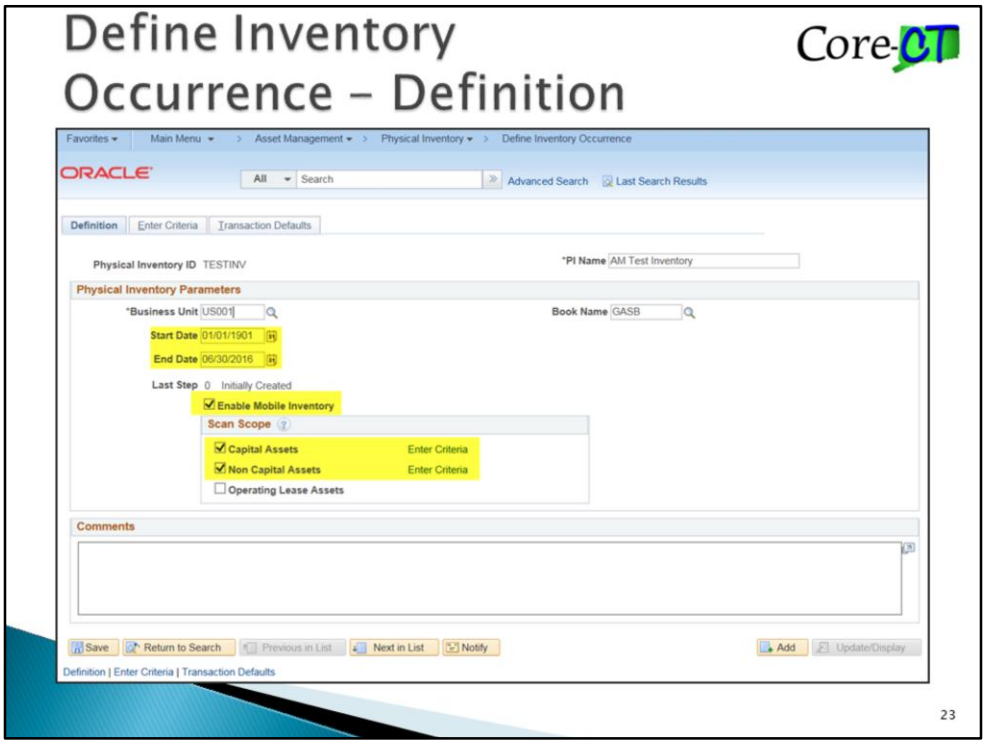


The Classic Physical Inventory method requires you to extract assets and generate an extract file, then load the file back into Asset Management.
The Mobile (Fluid UI) method does not require file downloads and uploads so there are fewer steps and opportunity for error.

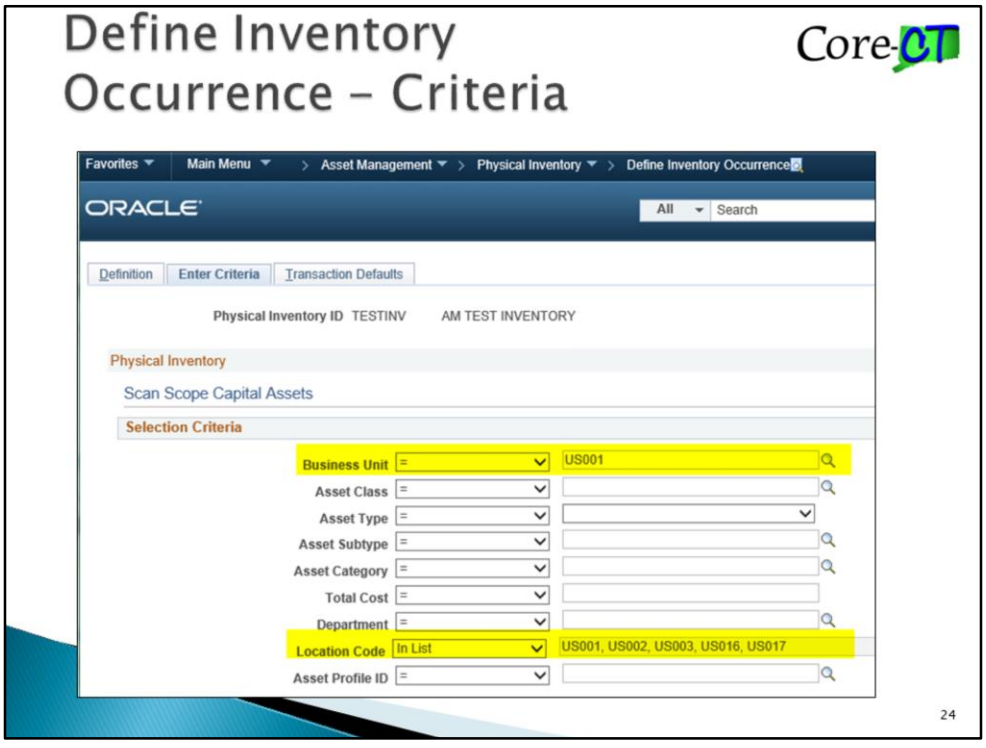
The only supported disconnected method is Classic (used with spreadsheet upload).



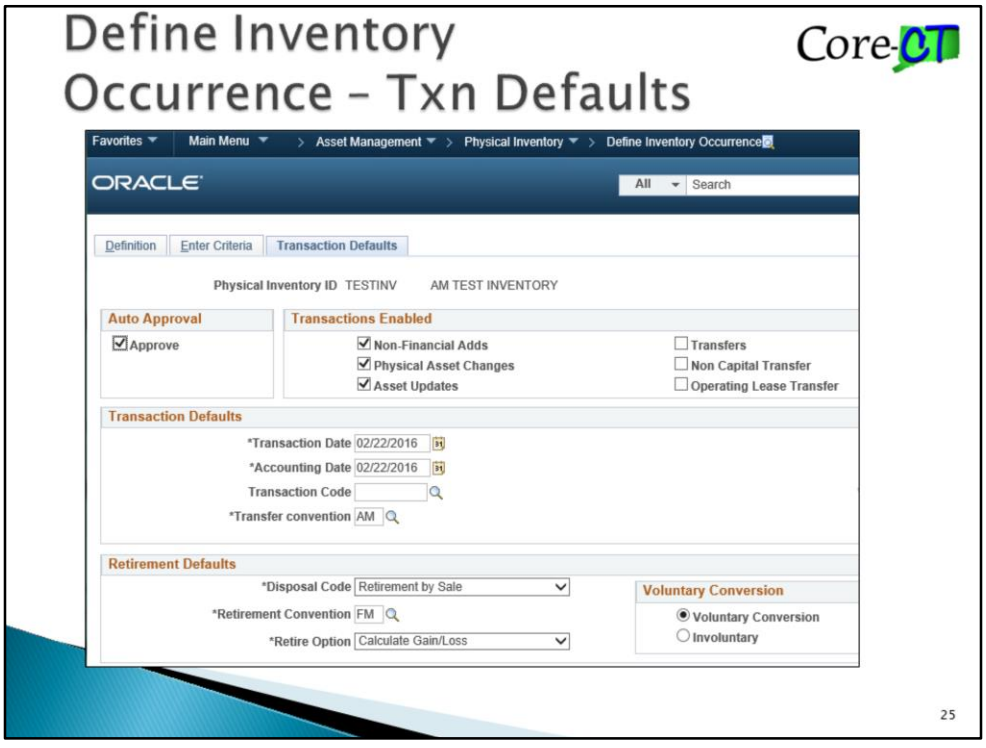
The Define Occurrence setup has now changed with an important emphasis on start and end dates. The Start and End dates can NOT be left blank.



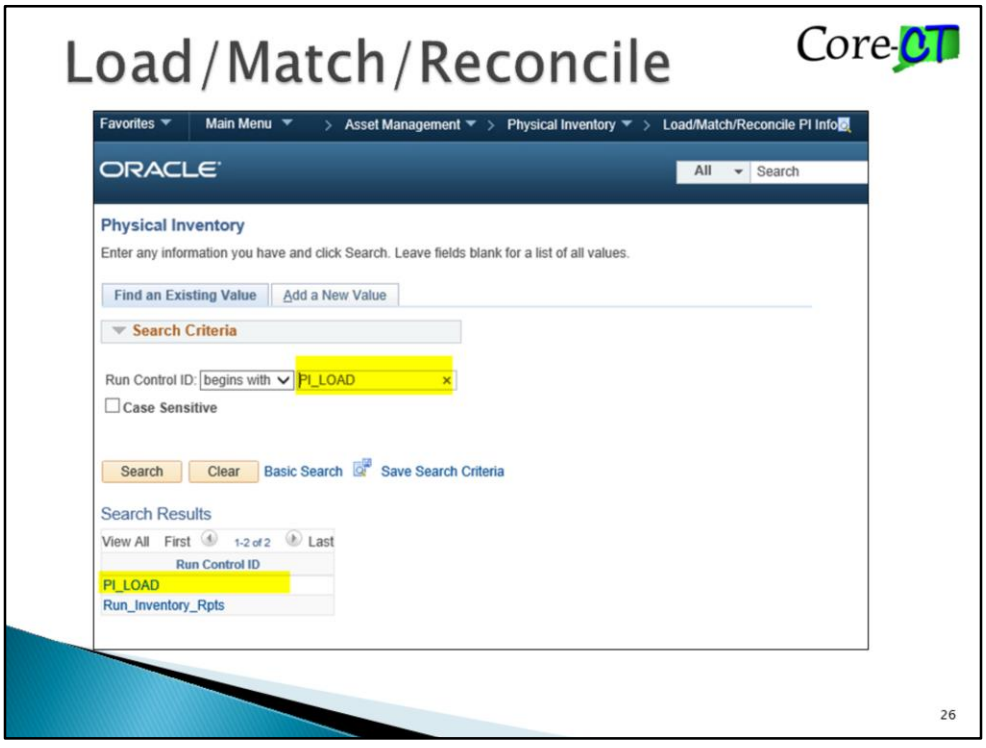
The new Occurrence is still setup on-line using the classic navigation. If the Enable Mobile Inventory box is NOT selected, then you would not be able to access the PI through the Fluid Interface.



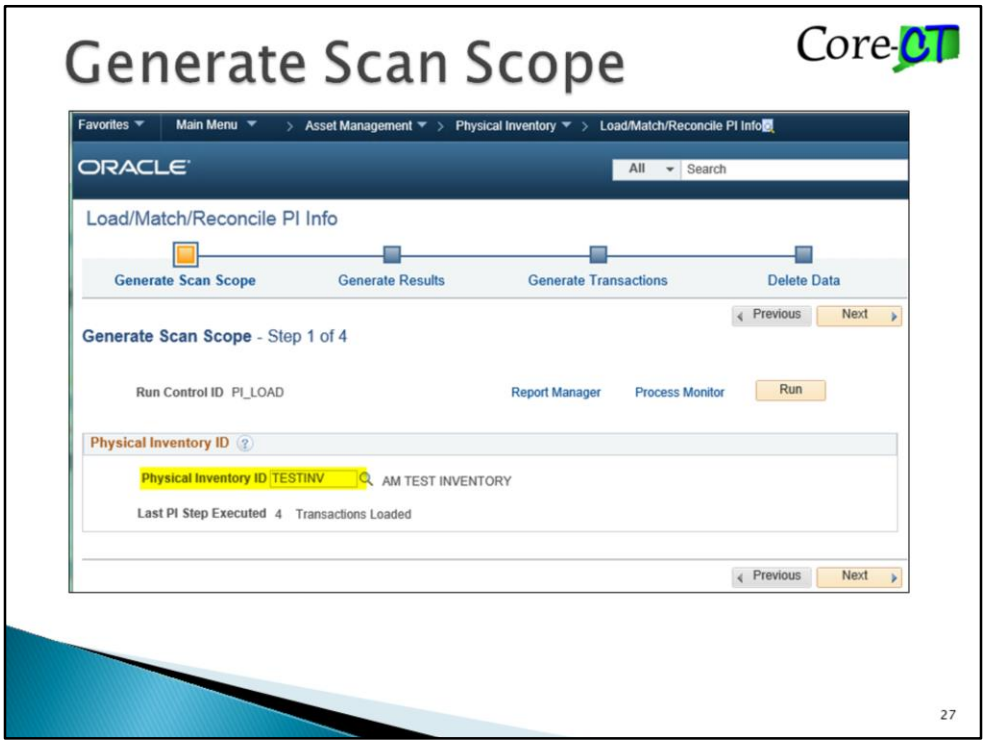
A great enhancement is the ability to enter strings of data. Currently in 9.1, you are required to insert new rows for each element. This is a substantial time saver.



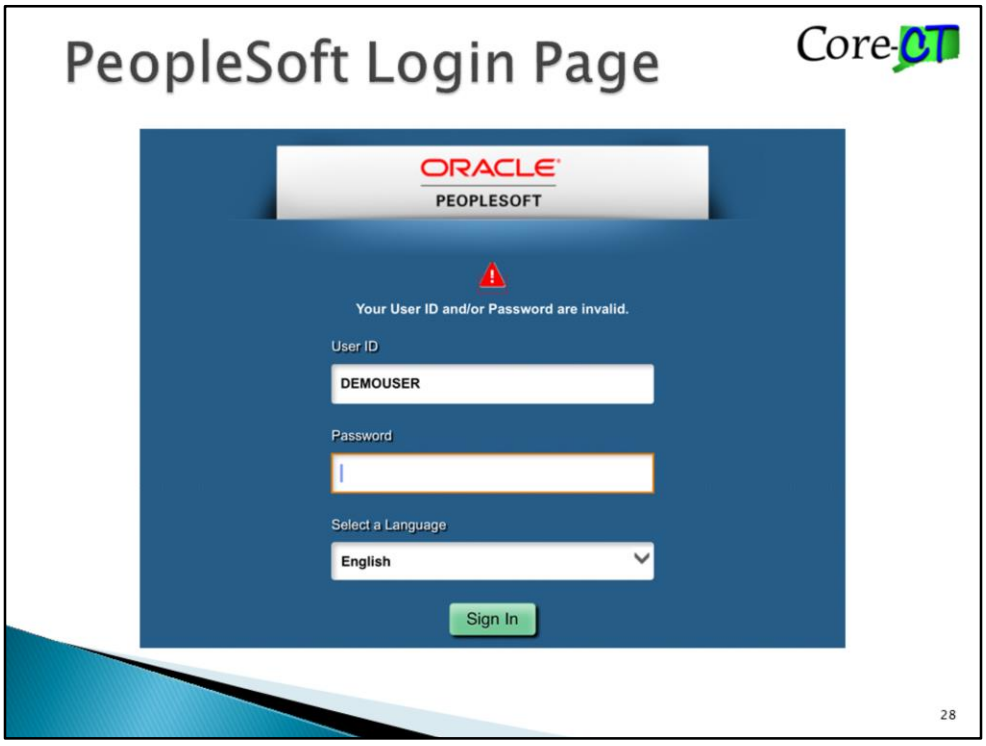
The Default Tab has not changed



Selecting a Run Control for Load/Match/Reconcile

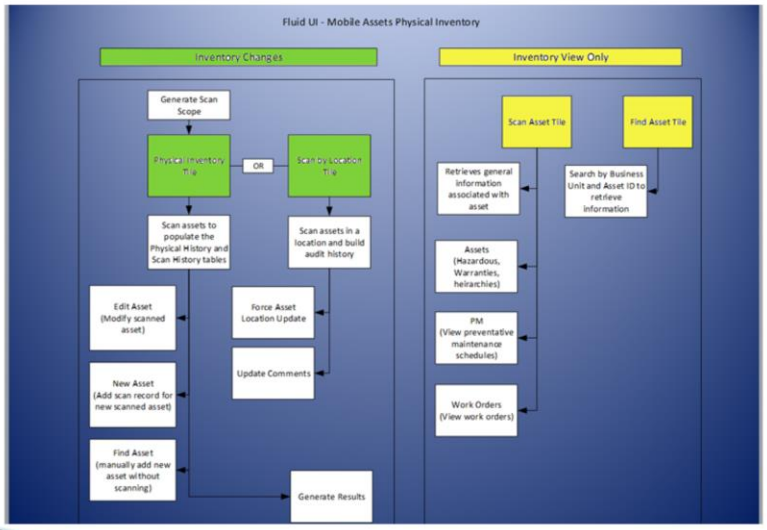


The new Fluid Mobile version of Load/Match/Reconcile (accessed on-line) is now streamlined with the Train Stops (four steps).



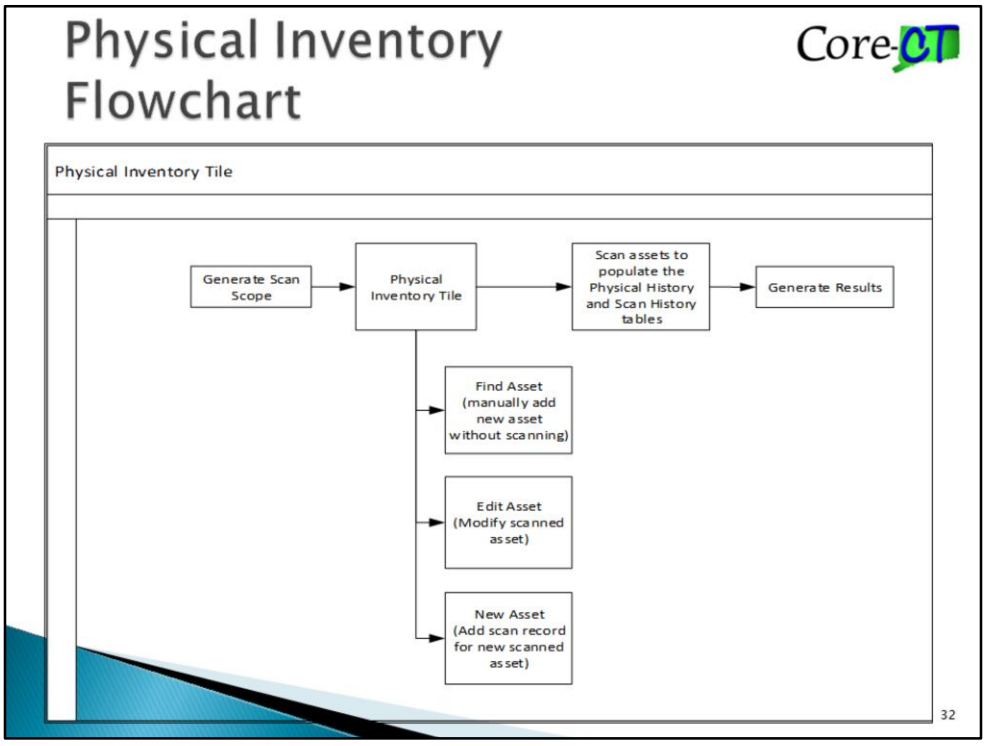
The Fluid PeopleSoft logon page is accessed directly on the device (through your Web Browser).

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.


Fluid UI - Mobile Assets Physical Inventory
Inventory Changes
Inventory View Only
Generate Scan Scope
Physical Inventory Tile
OR
Scan by Location Tile
Scan assets to populate the Physical History and Scan History tables
Scan assets in a location and build audit history
Edit Asset (Modify scanned asset)
Force Asset Location Update
Update Comments
New Asset (Add scan record for new scanned asset)
Find Asset (manually add new asset without scanning)
Generate Results
Scan Asset Tile
Find Asset Tile
Retrieves general information associated with asset
Search by Business Unit and Asset ID to retrieve information
Assets (Hazardous, Warranties, heirarchies)
PM (View preventative maintenance schedules)
Work Orders (View work orders)

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).



This illustrates the process flow for the Physical Inventory tile.

New Role

Core-CT

Agency Asset Scanner (Physical Inventory)
CT_F_A_PHYS_INVENT_SCNR

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. Permissions CT_F_A_PHYS_INVENT_SCNR CTAGYASSETVIEWER	Tasks: • 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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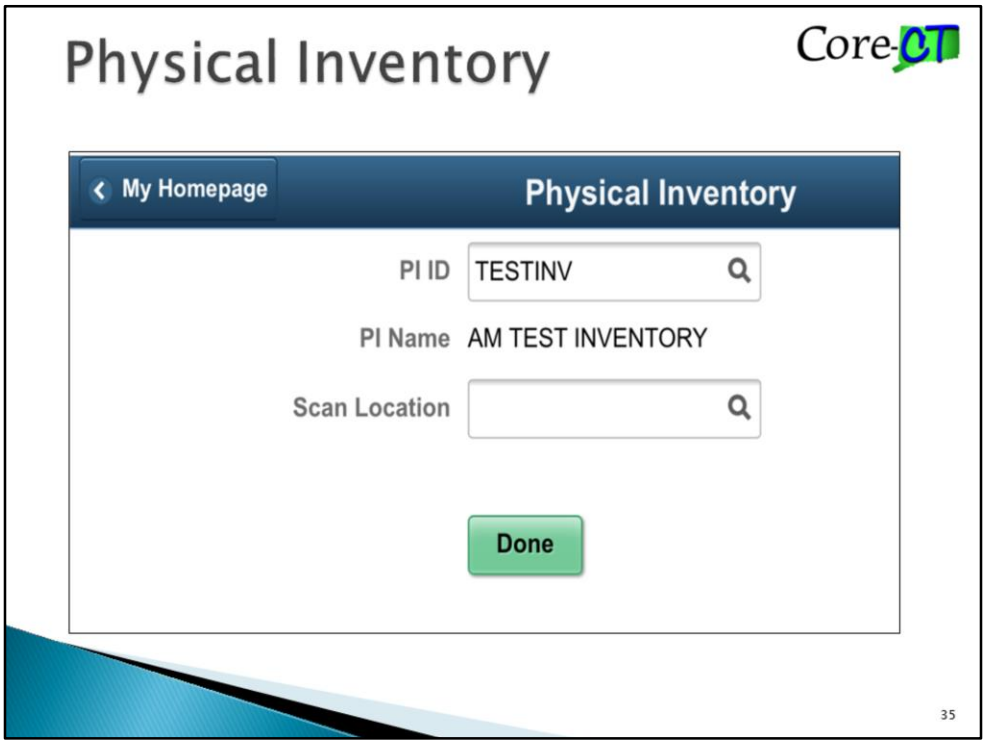
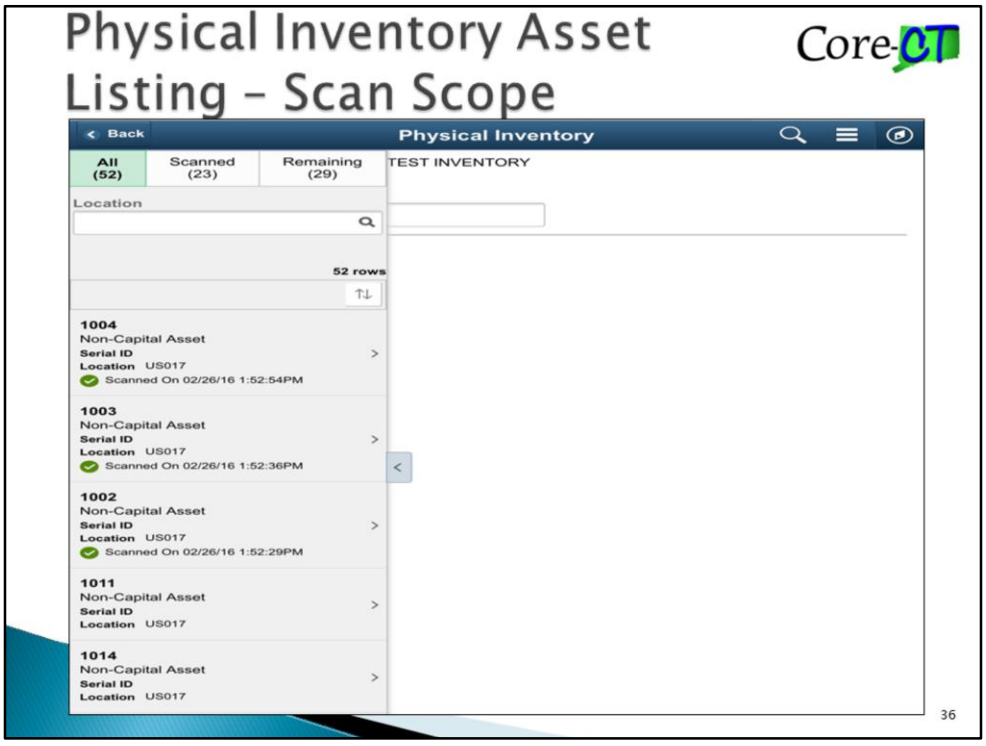
Physical Inventory

- 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



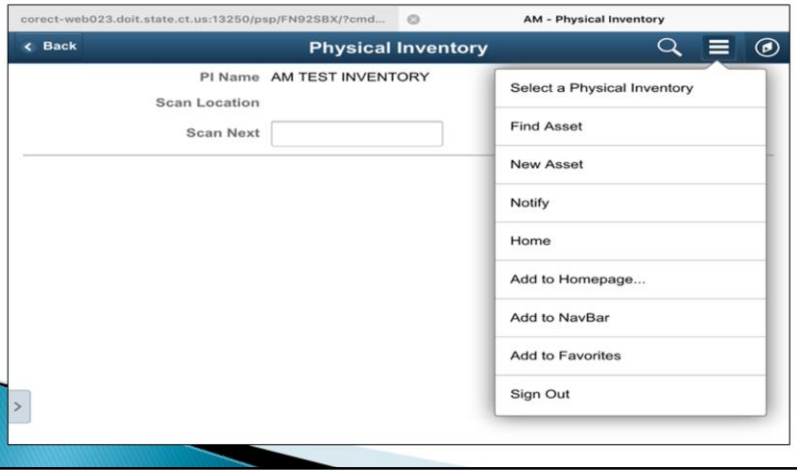
To perform a Physical Inventory, you need to select an existing PI ID. The optional Scan Location field allows you to update the scanned assets location automatically. In this example, we are going to leave the Scan Location blank.



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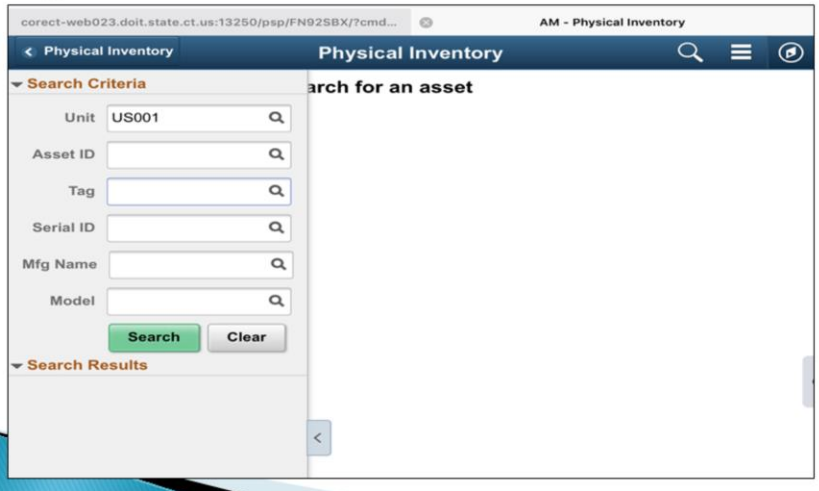
This option allows you to manually capture an asset without physically scanning it.

Physical Inventory

- Click on the magnifying glass search icon for Tag



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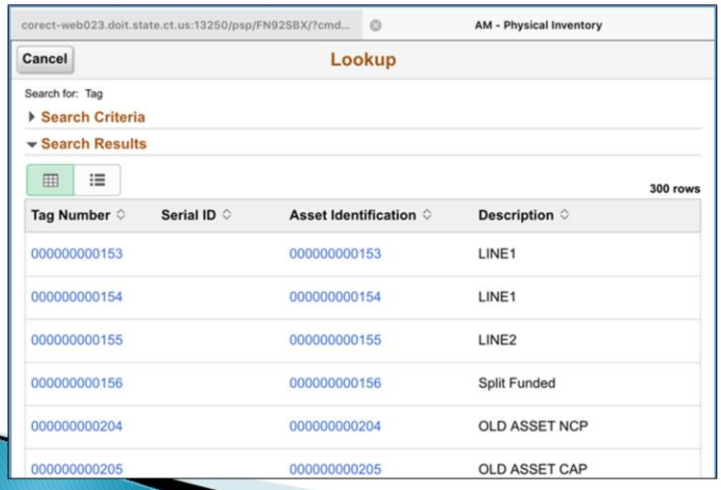
You can search using various filters.

Physical Inventory

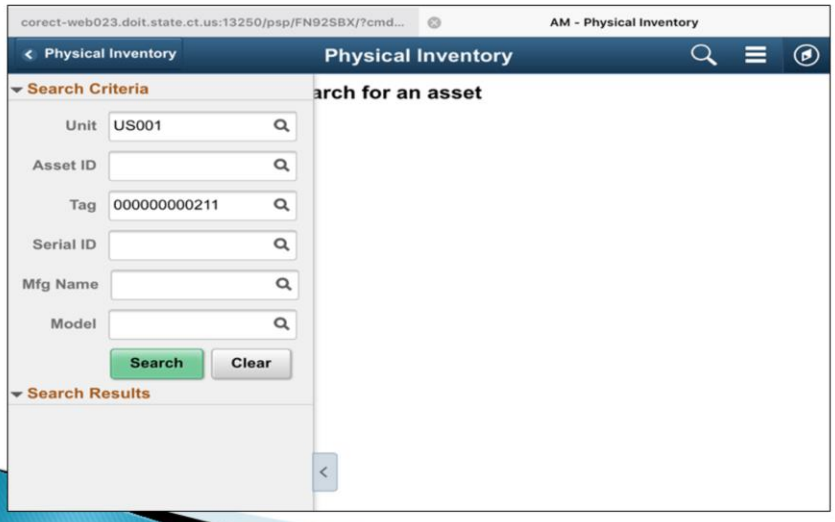
Select the asset record that needs to be scanned



Physical Inventory

Core-CT

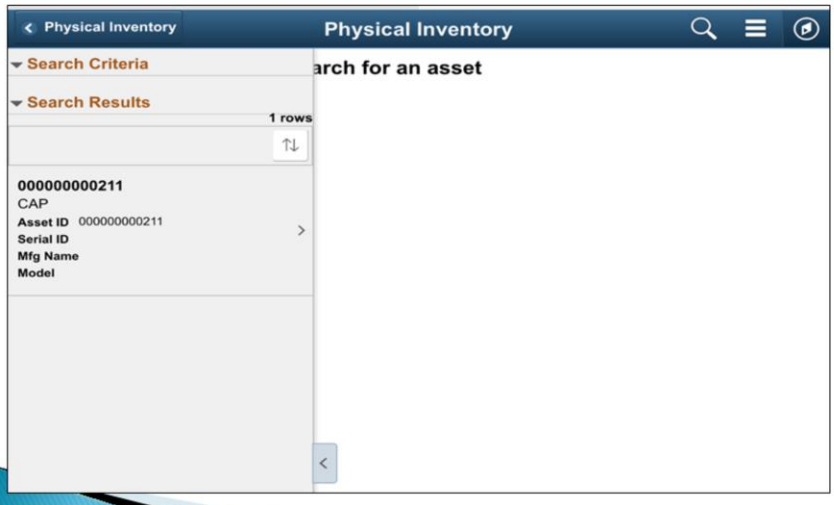
Click on the Search Button



Physical Inventory

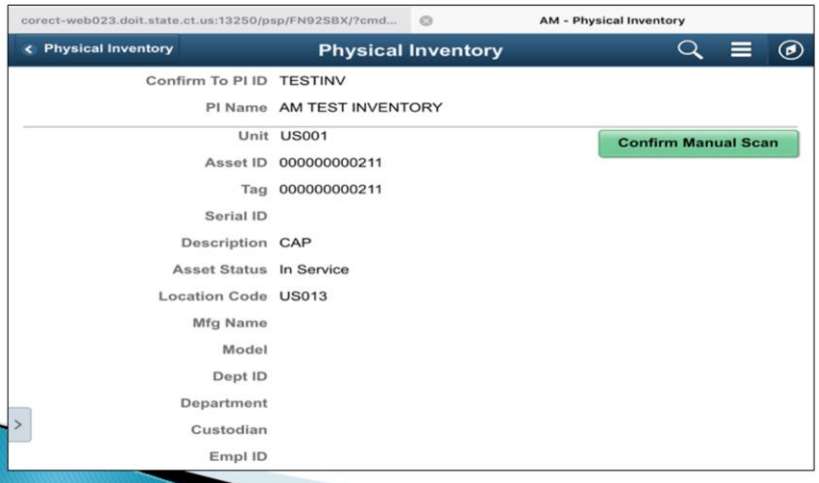
Core-CT

Click on the Asset in the Search Results



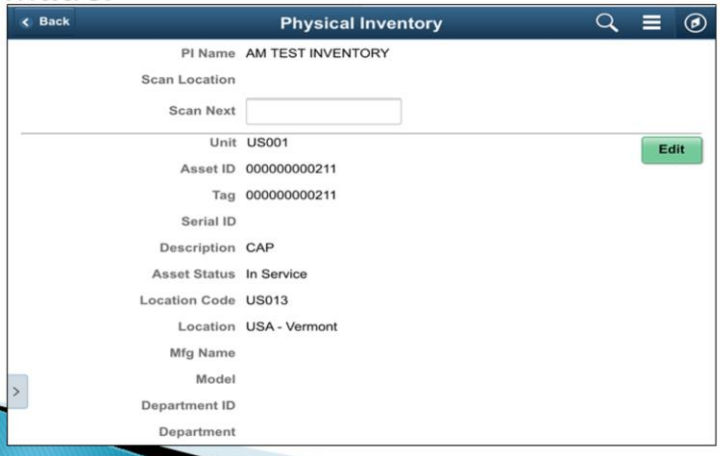
Physical Inventory

Click on the Confirm Manual Scan to scan the asset



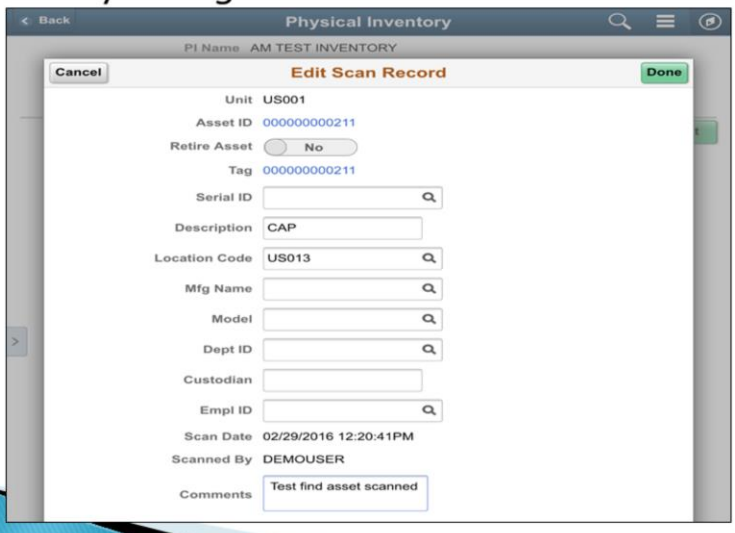
Physical Inventory

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

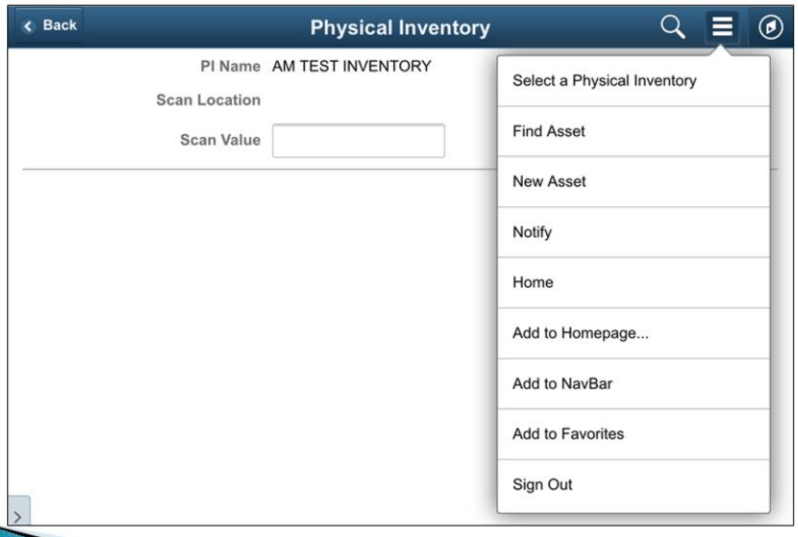


Physical Inventory

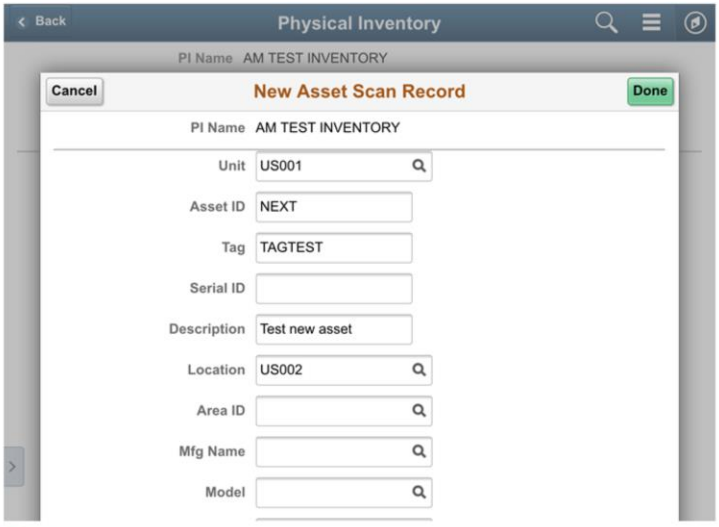
Make any changes and click Done.



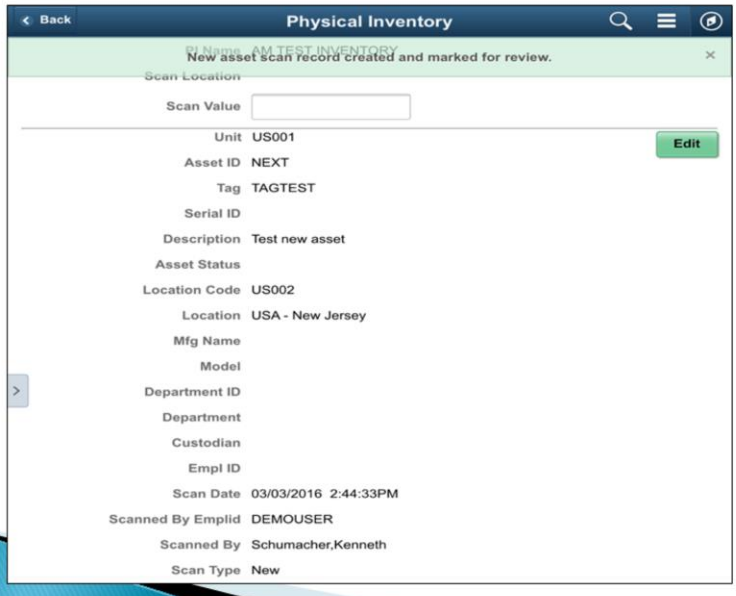
Physical Inventory New Asset



Physical Inventory New Asset



Physical Inventory New Asset



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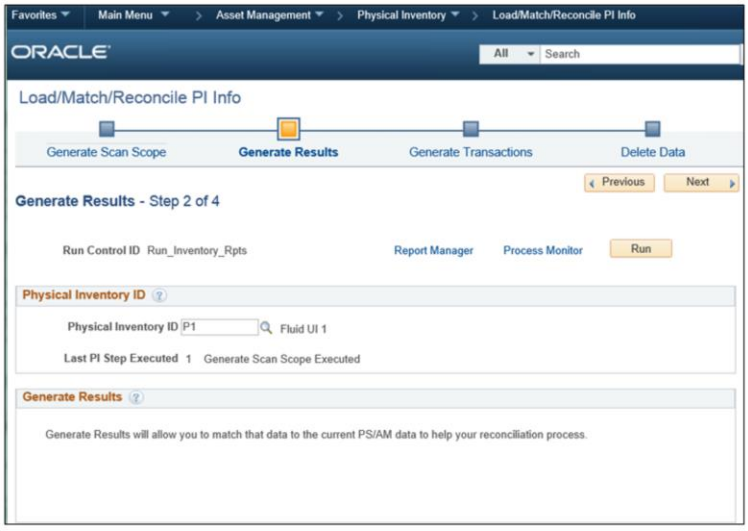
Generate Results



Remaining Processes

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

Scan by Location Tile

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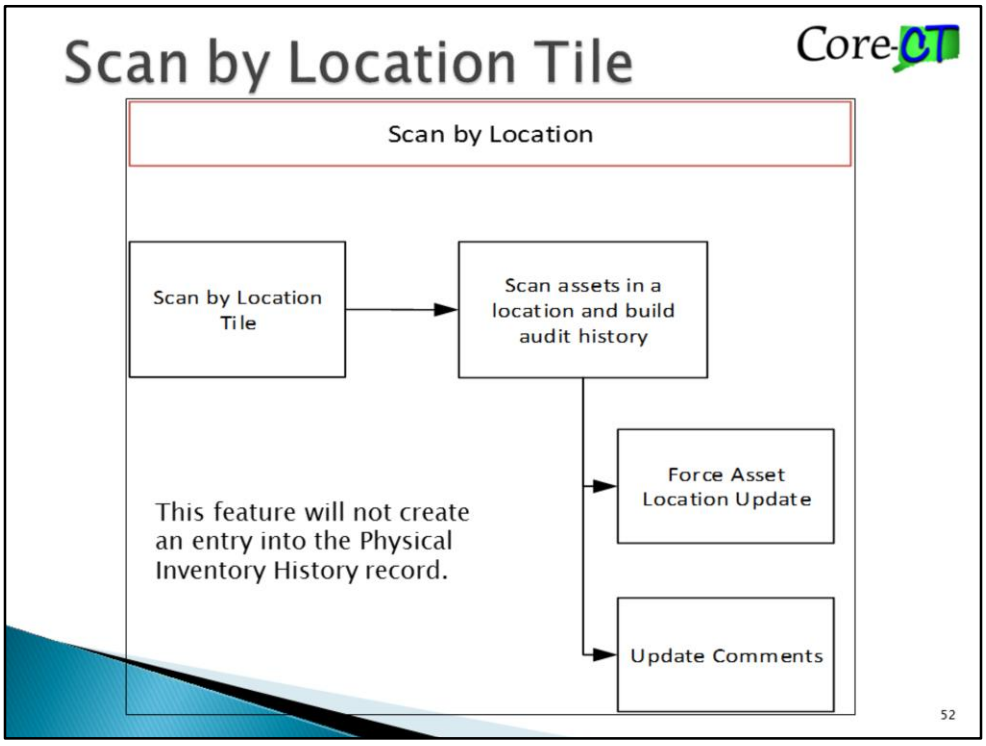
What is Scan by Location?

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



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.

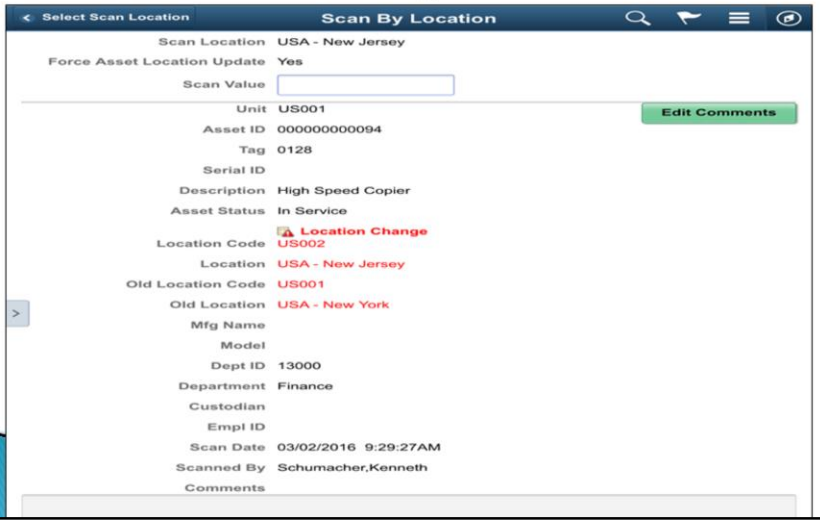
Scan by Location

Scan by Location

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

Scan by Location

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



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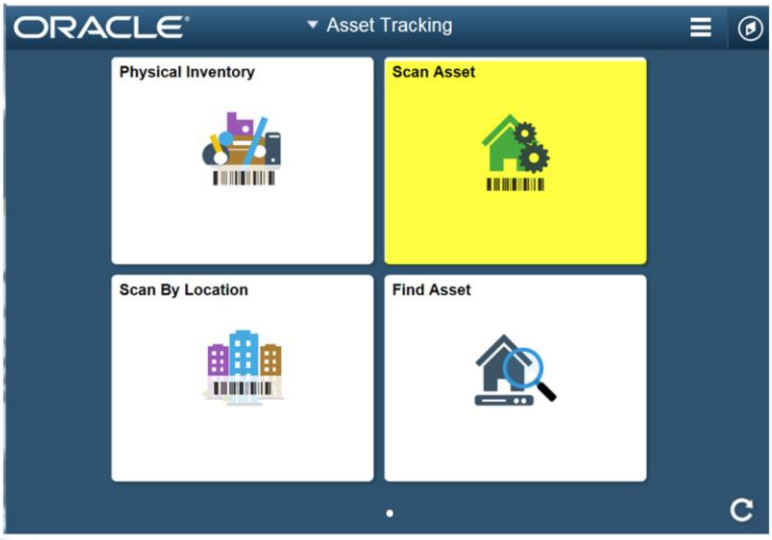
Scan Asset Tile

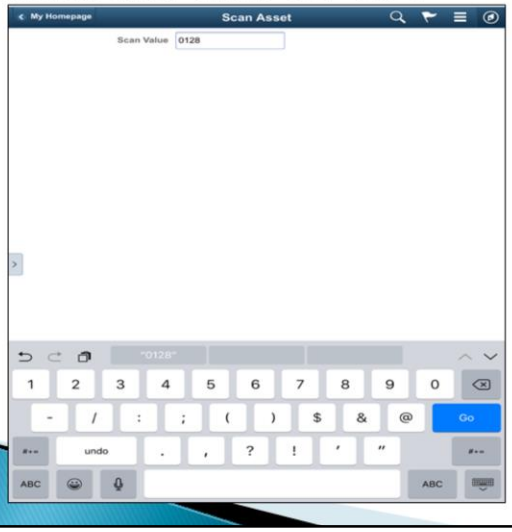


What is Scan Asset?

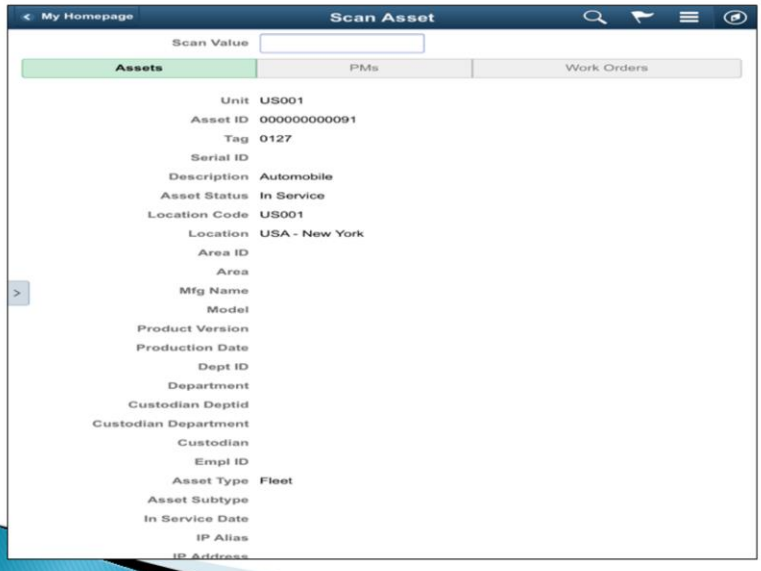
- Use the Scan Asset page to retrieve general information, preventative maintenance schedules, and work orders associated with the scanned asset.
- Asset information displayed on this page is retrieved from Asset Repository.

Scan Asset

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



Scan Asset



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Find Asset Tile

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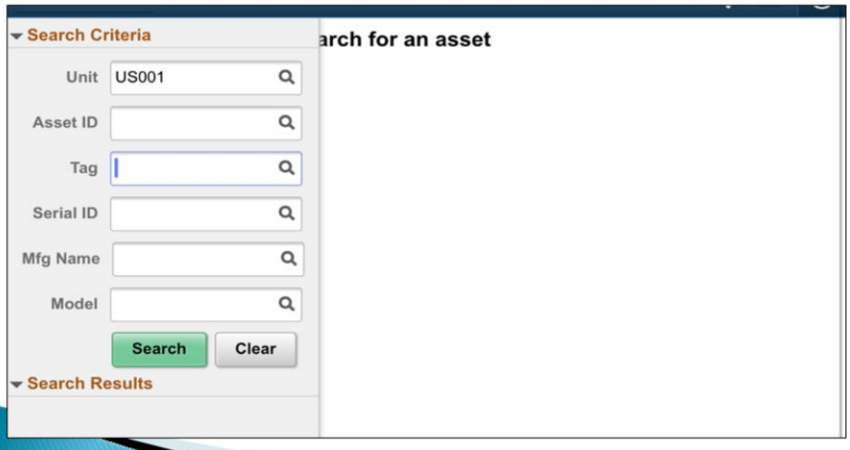
What is Find Asset?

- 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.



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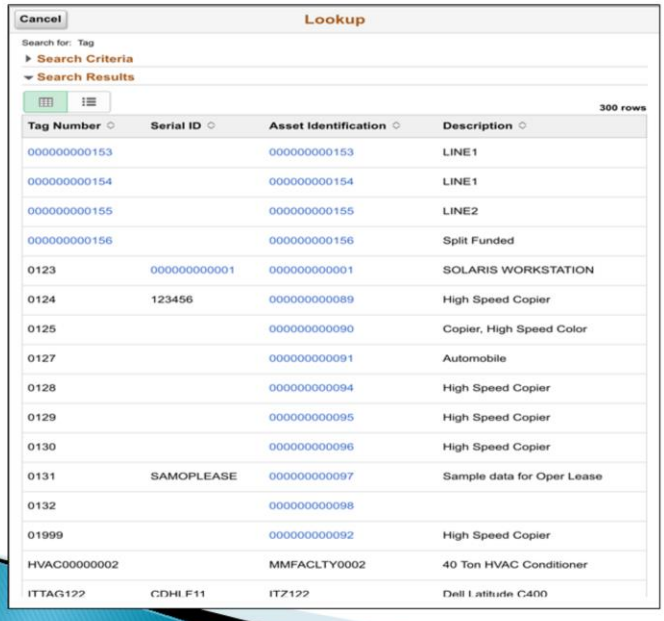
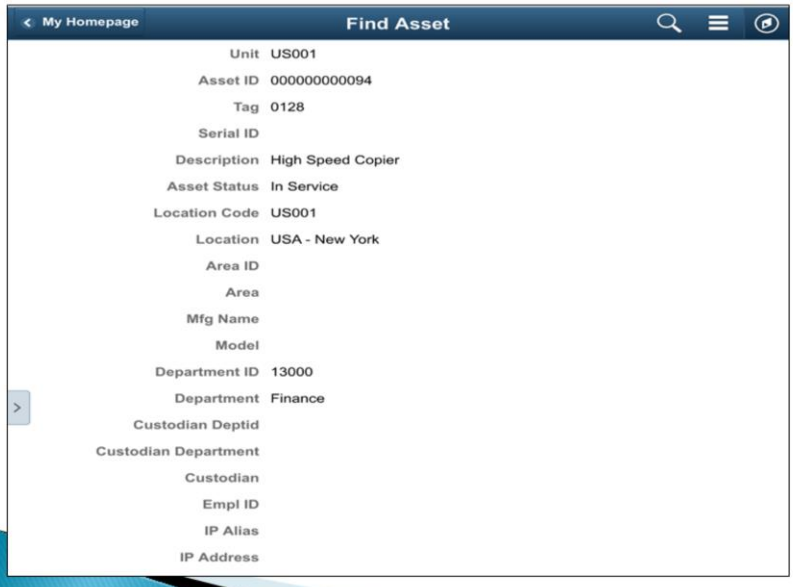
Find Asset Tile



Find Asset Tile



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Agenda

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

Demonstration Video

- 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

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Presentation Recap

- Questions
- Action Items

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