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# 1 Introduction

Asset Manager Web Edition is an easy-to-use online web application for tracking company asset records.

Asset Manager provides a central online repository for storing and retrieving your asset records, allowing you to quickly look up information about a specific asset or group of assets. Check-in or check-out assets to personnel by scanning the barcode to bring up the record right away. Asset Manager is designed to work with very little configuration required. This web edition allows you to set up your tracking system online and access it from anywhere with a web browser and internet connection.

## How It Works

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To get started, asset information is entered into the system as new asset records. Assets can then be "checked-out" to personnel who are the "custodians" of the asset.

Asset Manager can be used with or without a barcode reader. Without a barcode reader, Asset Manager functions as a standard Asset Management database which allows the user to search for assets through the user interface. Using a barcode reader however allows the user to quickly scan a barcode to find the asset record and check it in or out to an employee.

Asset Manager works with all types of barcode readers that support keyboard emulation (most do) – these are the types of barcode readers that are hooked up to a computer and send keystrokes as if they were typed in. These barcode readers are sometimes referred to as "keyboard wedge" or just "wedge" type scanners.

- An asset history is automatically maintained as assets are audited or checked in or out.
- Reports allow you to print a list of all assets, checked out assets, or an audit check list.
- Asset Manager also includes a complete Personnel and Vendor database.
- You may grant users access to the system with Roles which determine their level of access.

## Features and Benefits at a Glance

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### Features:

- ✓ Track asset information including a picture, description, brand, model, manufacturer, serial numbers and more.
- ✓ Include file attachments and notes.
- ✓ Check-in and check-out assets to personnel.
- ✓ Track Vendors and Contact information.

### Benefits

- ✓ Eliminate time wasted searching for and replacing lost or missing assets.
- ✓ Keep track of who has an asset and when it is due for return.
- ✓ Ensure all checked-out assets are accounted for when an employee leaves the company.
- ✓ Maintain a central repository for asset manuals, and instructions.

## Asset Manager Subscription

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- An Asset Manager subscription may be purchased online with a credit card. To purchase a subscription:
  - 1) Login to your Trial account.
  - 2) Click the button in the toolbar for the main "Options" page.
  - 3) Click the "Begin Paid Subscription" button, and then choose your subscription plan.

- Your Asset Manager subscription will be kept up-to-date with all new releases automatically at no extra charge.
- Your subscription includes all required web hosting and file storage.
- Support by email is available free for both trial and licensed users (see additional support information in the next section).

\*Prices are listed on the main pricing page in USD. Prices in EUR and other currencies are based on the exchange rate at the time of purchase, and will be displayed on the checkout page.

## Asset Manager Support

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All Asset Manager support is available free by email. Additional paid support by telephone is not available at this time. This support model allows our customers around the globe to reach an appropriate expert for their specific technical, sales, or customer service question without wading through multiple levels of support and call backs. Support tickets may be submitted through the website at [www.kaizensoftware.com](http://www.kaizensoftware.com)

## See Also

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- Registration and Login
- User Interface
- Populate the data

## 1.1 Registration and Login

### Registration

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You can register a new account for your company at the following link:

<https://www.kaizen-assets.com/account/register>

You will need to fill in the following fields:

Field Name	Description
Company Name (for url):	This value will determine the url which you will use to access your account. For example, if you enter the company name, "acme", then the url to your account will be: <a href="https://acme.kaizen-assets.com">https://acme.kaizen-assets.com</a> .
Email:	This is your email address where the confirmation link will be sent.
Agreement (check box):	You must agree to the Terms and Conditions to register.

After submitting your registration information, check your email for a link to complete your registration.

The link will direct you to a page where you can provide your name and password to complete the registration. Submit the information and wait a few seconds as your account is set up.

### Login

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You can login to your account at [your custom url]/account/login, where [your custom url] is the url you set up during registration. To login, enter your email address and password. If you do not know your password, click the "Forgot Password?" link on the login form, and then continue to send a "Password Reset" link to your email address. The link will expire after 24 hours.

Note: you can also go to our main website at: [www.kaizensoftware.com](http://www.kaizensoftware.com), and click the Login link in the upper right part of the page. If your company login page has been previously saved on that computer, it will take you directly there. Otherwise it will take you to a login page with an additional field where you can enter your company name to login.

## 1.2 User Interface

This section describes the common user interface elements used throughout the web application.

### The Main Page

The Asset Manager window is divided into 4 areas: the Main Navigation Buttons, The Toolbar Buttons, The List or Detail View, and the Navigation Folders.

The screenshot shows the Asset Manager web application interface. The browser address bar displays <https://example.kaizen-assets.com/assets>. The user is logged in as John Smith. The interface is divided into four main areas:

- Main Navigation Buttons:** Dashboard, Assets, People, Vendors, Reports, Options.
- Toolbar Buttons:** New Asset, Check Out, Check In, Audit, Delete, Refresh.
- Navigation Folders:** All Types, All Locations, Trash.
- List/Detail View:** A table of assets with columns: Asset Name, Asset Number, Brand, Model, Custodian, Last Update. The table contains 17 entries, with the first 10 shown. A yellow box highlights the 'List/Detail View' label in the table.

Asset Name	Asset Number	Brand	Model	Custodian	Last Update
<input type="checkbox"/> Cargo Van	AST000008	Ford	Transit-350	N/A	11/1/2015 4:49:52 PM
<input type="checkbox"/> Cargo Van	AST000010	Ford	Transit-350	N/A	11/1/2015 4:49:52 PM
<input type="checkbox"/> Drill Press	AST000006	Skil	3320-01	N/A	11/1/2015 4:49:52 PM
<input type="checkbox"/> Forklift	AST000009				11/1/2015 4:49:52 PM
<input type="checkbox"/> Forklift	AST000012	Cat	CAT200	N/A	11/1/2015 4:49:52 PM
<input type="checkbox"/> Laptop Computer	AST000013	Dell	XP5	N/A	2/19/2016 12:54:56 PM
<input type="checkbox"/> Laptop Computer	AST000001	Dell	XP5	John Smith	11/1/2015 4:35:26 PM
<input type="checkbox"/> Mobile Phone	AST000002	HTC	XR-1	John Smith	11/1/2015 4:35:27 PM
<input type="checkbox"/> Mobile Phone	AST000014	HTC	XR-1	N/A	11/1/2015 4:49:52 PM
<input type="checkbox"/> Multi-meter	AST000007	Hyelec	My61	N/A	11/1/2015 4:49:52 PM

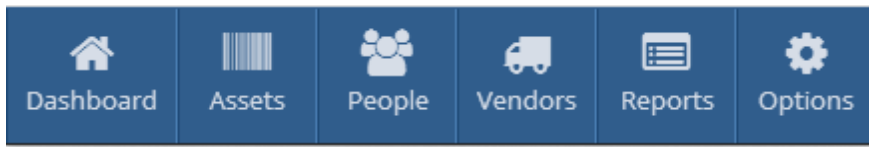
Showing 1 to 10 of 17 entries

Previous 1 2 Next

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### The Main Navigation Buttons

The **Main Navigation Buttons** allow you to easily switch between the main pages in the web application: Dashboard, Assets, Personnel, Vendors, Reports, and Options.



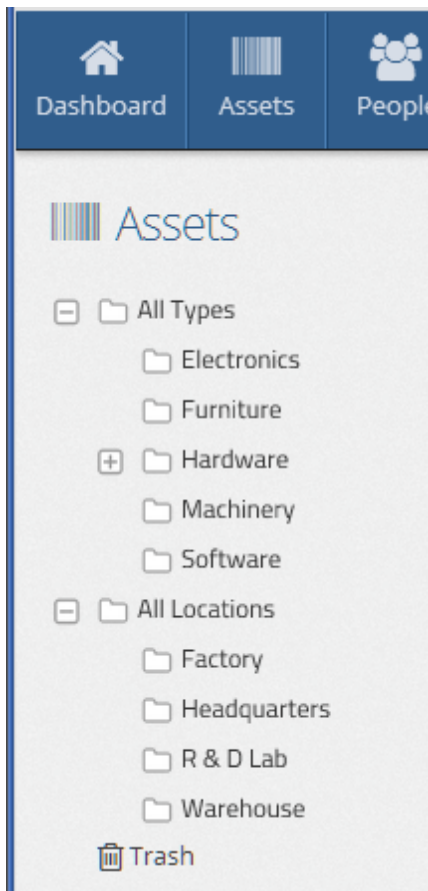
## The List/Detail Views

The main part of the page will display a list of records. When you click on an item in the list, it will display the detail view for that item.

Search a list by typing your search criteria into the Filter box.

## The Navigation Folders

The Asset list view and the Personnel list view both contain navigation folders on the left side of the screen. These folders allow you to organize the data into groups and quickly filter the list by clicking on a folder. You may create new folders by right-clicking on the navigation folder area and selecting the "New" option from the menu. Or, rename an existing folder by right-clicking on the folder and selecting the "Rename" menu option.

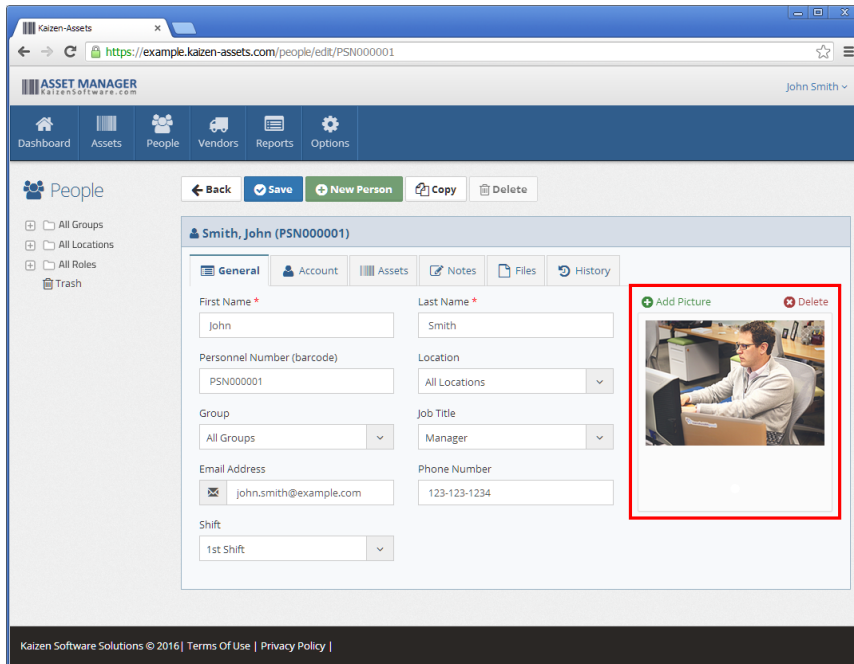
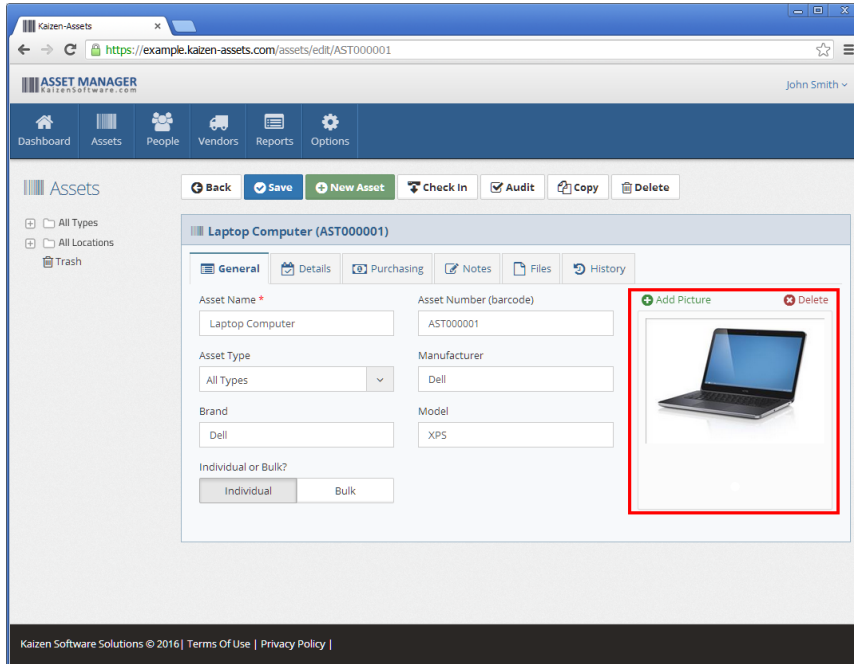


## Picture Fields

Picture fields allow you to add a picture to a record. This field is available on the Asset and the Personnel

Detail pages.

- Click the **Add Picture** button to add a new picture to the record.
- Click the **Delete Picture** button to delete the currently displayed picture.
- When multiple pictures are added, you can swipe (on a touchscreen) or use the arrows to move from one picture to another.



## Tabs



## Files Tabs

Upload any type of file on the Files tabs.

**Laptop Computer (AST000013)**

General Details Purchasing Notes **Files** History

Attach Delete

<input type="checkbox"/>	File Name	File Size	Uploaded
<input type="checkbox"/>	Warranty Information.pdf	4 bytes	2/19/2016 12:58:55 PM
<input type="checkbox"/>	User Manual.pdf	4 bytes	2/19/2016 12:58:54 PM

Showing 1 to 2 of 2 entries

Previous 1 Next

## History Tabs

The History tabs on the detail pages show a timestamped list of changes to the record.

**Laptop Computer (AST000013)**

General Details Purchasing Notes Files **History**

Action	Change Summary	User	Timestamp
Copy	Copied from Asset record Laptop Computer (AST000001).	Smith, John (PSN000001)	11/1/2015 4:43:33 PM
Delete	Deleted Asset record: Laptop Computer (AST000013).	Smith, John (PSN000001)	11/1/2015 4:46:28 PM
Restore	Restored Asset record: Laptop Computer (AST000013).	Smith, John (PSN000001)	11/1/2015 4:49:52 PM
Update	Updated Asset record: Laptop Computer (AST000013).	Smith, John (PSN000001)	2/19/2016 12:53:13 PM
Update	Updated Asset record: Laptop Computer (AST000013).	Smith, John (PSN000001)	2/19/2016 12:54:56 PM

Showing 1 to 5 of 8 entries

Previous 1 2 Next

## 1.3 Populate the data

Data may be entered in any order as needed; however, it can be helpful when you start out to enter your data in the order described below for a smooth flow, minimizing the back-and-forth jumping from one area of the database to another. Below is a summary of the steps to populate your database.

### Step 1: Selection Fields

Open the **Options** page by clicking the Options button in the main navigation, and then click the **Selection Fields** link located in the left side navigation area.

Next, choose a selection field to update by clicking on Status, Condition, Job Title, or Shifts. You can add,



edit, and delete values for each selection field as needed.

If you don't have all of the data now, that's ok. You can always enter it in later, but entering it now will allow you to easily select it when adding Asset and Personnel records in the following steps.

## Step 2: Asset Types, Locations, and Personnel Groups

Locate the **navigation folders** on the left side of the main Asset List page. Right-click on a folder and then choose from the menu option to add New, Rename, or Delete a folder. Use this process to organize the Asset Types and Locations on the Asset List, and then repeat the same process for the Personnel Groups on the main Personnel List page.

You can edit the position within the folder hierarchy by dragging and dropping a folder from one level in the hierarchy to another.

## Step 3: Personnel

Next, enter your master list of Personnel on the Personnel tab. Begin a new record by clicking the "New Person" button. Fill in the information and then click the **Save** button to add the new person to the list. The personnel entered in this section will appear in the list of personnel on the Check Out form for an asset.

## Step 4: Vendors

Add new vendors by clicking the "New Vendor" button on the main Vendors tab. The vendors will appear in the drop-down selection field on the Asset Form - Purchasing tab.

## Step 5: Assets

After entering the Selection Field Values, Personnel, and Vendors, you can add Asset records and use the drop-down fields to select from the existing values that you have set up. To add an Asset record, click the "New Asset" button and then fill in the information.

## Step 6: Report Header and Footer

To change the default header and footer on reports, go to the main **Options** page by clicking the button in the Main Navigation along the top, and then click the **Report Options** link located in the left side navigation area. You can then enter the values for the Header and Footer as needed, and then Save the changes.

## 2 How To (Steps)

- Manage Asset Records
- Manage Personnel Records
- Manage Vendor Records

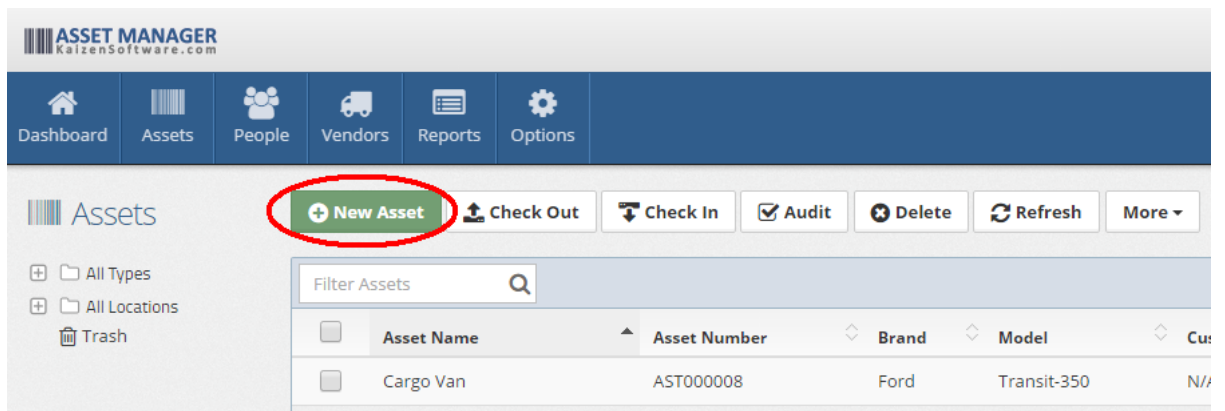
### 2.1 Manage Asset Records

Select a topic below:

- Add New Assets
- Edit Assets
- Delete Assets
- Restore Assets
- Check-Out assets
- Check-In assets

### 2.1.1 Add New Assets

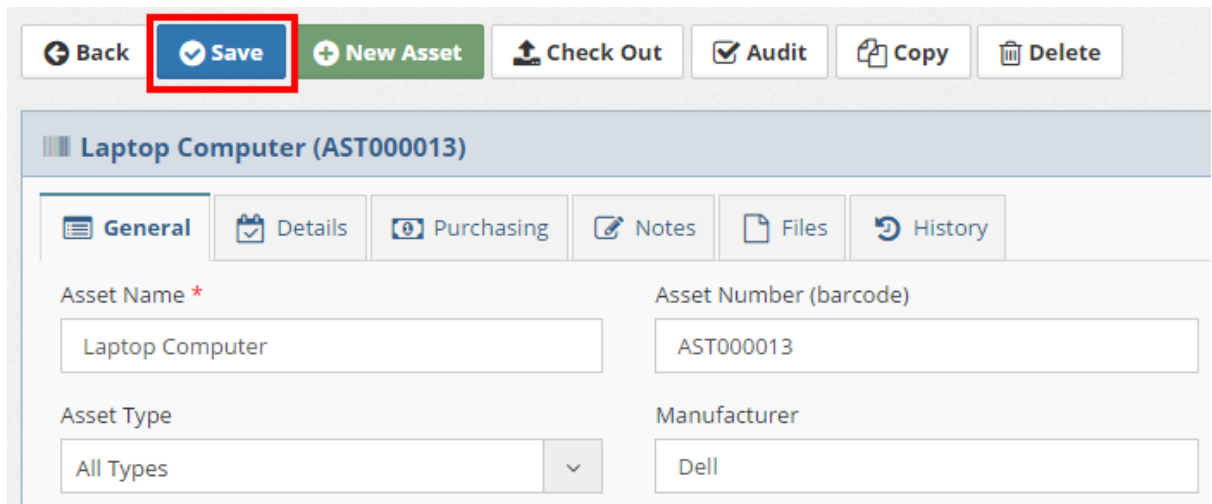
1. Click the **New Asset** button located on either the Asset List page or an existing Asset Detail page.



2. Fill in the **Asset Name** field on the new Asset page. This is the only Required field. You may leave the "Asset Number (barcode)" field empty to have a new asset number automatically created for you. Alternatively, you can enter a value manually by typing the value into the field.

The screenshot shows the 'New Asset' form in the Asset Manager web application. The form has a header '[New Asset]' and a navigation bar with tabs for 'General', 'Details', 'Purchasing', 'Notes', 'Files', and 'History'. The 'General' tab is selected. The form contains several fields: 'Asset Name \*' (highlighted with a red box), 'Asset Number (barcode)' (with a dropdown set to 'Automatic'), 'Asset Type' (with a dropdown set to 'All Types'), 'Brand', 'Manufacturer', and 'Model'. At the bottom, there are two buttons for 'Individual' and 'Bulk'.

3. Click the **Save** button to save the asset record after filling in any other fields as necessary.



The screenshot displays a web-based asset management interface. At the top, there is a navigation bar with several buttons: 'Back', 'Save', 'New Asset', 'Check Out', 'Audit', 'Copy', and 'Delete'. The 'Save' button is highlighted with a red rectangular border. Below the navigation bar, the main content area is titled 'Laptop Computer (AST000013)'. Underneath the title, there are several tabs: 'General', 'Details', 'Purchasing', 'Notes', 'Files', and 'History'. The 'General' tab is currently selected. The form contains several input fields: 'Asset Name \*' with the value 'Laptop Computer', 'Asset Number (barcode)' with the value 'AST000013', 'Asset Type' with a dropdown menu showing 'All Types', and 'Manufacturer' with the value 'Dell'.

## See Also

Asset Details

### 2.1.2 Edit Assets

1. Locate the asset by placing your cursor in the **Filter Assets** box on the Asset List page, and then scan the asset barcode or type a few characters of the description or asset number.

The screenshot shows the Asset Manager web application interface. The top navigation bar includes links for Dashboard, Assets, People, Vendors, Reports, and Options. The main content area is titled "Assets" and features a search bar containing the asset ID "AST000001". Below the search bar is a table with the following data:

<input type="checkbox"/>	Asset Name	Asset Number
<input type="checkbox"/>	Laptop Computer	AST000001

Below the table, it states "Showing 1 to 1 of 1 entries (filtered from 18 total entries)".

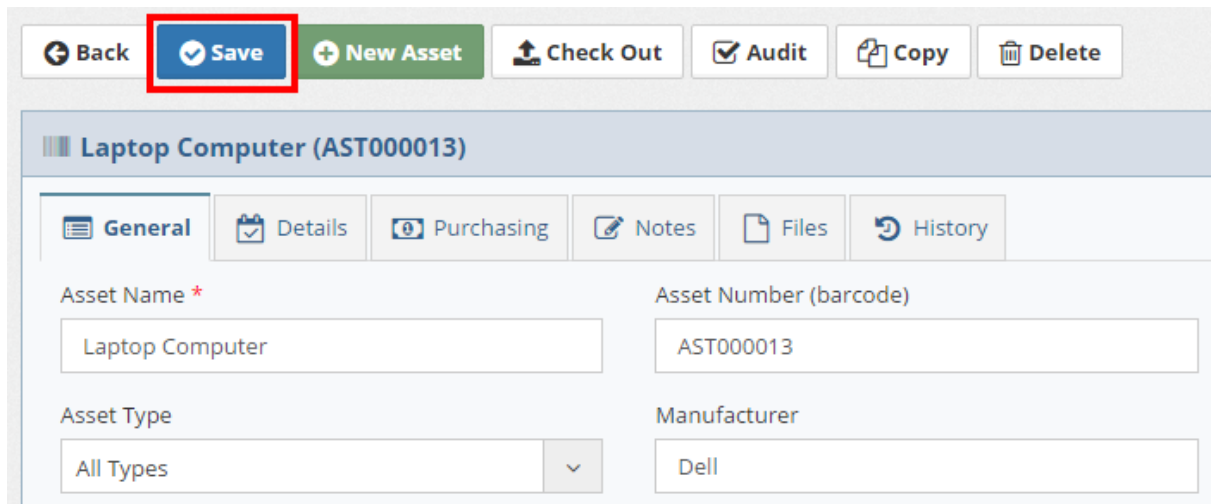
2. Click on the row containing the asset to open the Asset Detail page.

The screenshot shows the Asset Manager web application interface, similar to the previous one. The search bar contains "AST000001". The table below has the following data:

<input type="checkbox"/>	Asset Name	Asset Number
<input type="checkbox"/>	Laptop Computer	AST000001

A red box highlights the row containing "Laptop Computer" and "AST000001", with the text "- Click in this row -" overlaid on it. Below the table, it states "Showing 1 to 1 of 1 entries (filtered from 18 total entries)".

3. Type or select a new value in the fields as needed, and then click the **Save** button.



The screenshot shows the 'Laptop Computer (AST000013)' form in the Asset Manager. The 'Save' button is highlighted with a red box. The form includes fields for Asset Name, Asset Number (barcode), Asset Type, and Manufacturer.

Field	Value
Asset Name *	Laptop Computer
Asset Number (barcode)	AST000013
Asset Type	All Types
Manufacturer	Dell

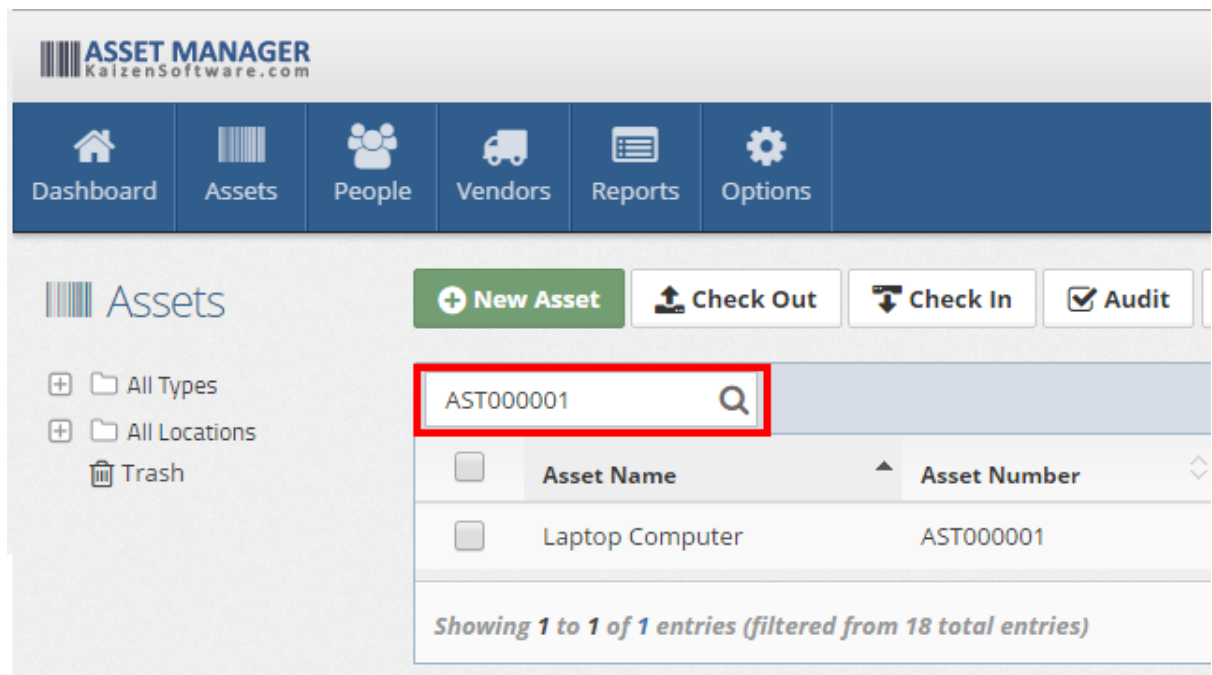
\*If the asset cannot be found ensure that you are searching the entire database by selecting the "All Types" and "All Locations" folders on the left.

## See Also

Asset Details

### 2.1.3 Delete Assets

1. Locate the asset to delete by placing your cursor in the "Filter Assets" box on the Asset List page, and then scan the asset barcode or type a few characters of the description or number.



The screenshot shows the 'Assets' page in the Asset Manager. The search filter box is highlighted with a red box and contains the text 'AST000001'. The page displays a table of assets with columns for Asset Name and Asset Number.

Asset Name	Asset Number
Laptop Computer	AST000001

Showing 1 to 1 of 1 entries (filtered from 18 total entries)

- Place a check in the box next to the asset which you wish to delete, and then click the "Delete" button in the Asset List toolbar, or open the Asset Detail page, and then click the "Delete" button.

The screenshot shows the Asset Manager Web Edition interface. The top navigation bar includes Dashboard, Assets, People, Vendors, Reports, and Options. The main content area is titled 'Assets' and features a toolbar with buttons for New Asset, Check Out, Check In, Audit, and Delete. A table of assets is displayed below the toolbar, with columns for Asset Name, Asset Number, and Brand. The 'Drill Press' asset is highlighted in yellow, and its checkbox is circled in red.

<input type="checkbox"/>	Asset Name	Asset Number	Brand
<input type="checkbox"/>	Cargo Van	AST000008	Ford
<input type="checkbox"/>	Cargo Van	AST000010	Ford
<input checked="" type="checkbox"/>	Drill Press	AST000011	Skil

The screenshot shows the Asset Manager Web Edition interface. The top navigation bar includes Dashboard, Assets, People, Vendors, Reports, and Options. The main content area is titled 'Assets' and features a toolbar with buttons for New Asset, Check Out, Check In, Audit, and Delete. A table of assets is displayed below the toolbar, with columns for Asset Name, Asset Number, and Brand. The 'Drill Press' asset is highlighted in yellow, and its checkbox is checked. The 'Delete' button in the toolbar is circled in red.

<input type="checkbox"/>	Asset Name	Asset Number	Brand
<input type="checkbox"/>	Cargo Van	AST000008	Ford
<input type="checkbox"/>	Cargo Van	AST000010	Ford
<input checked="" type="checkbox"/>	Drill Press	AST000011	Skil

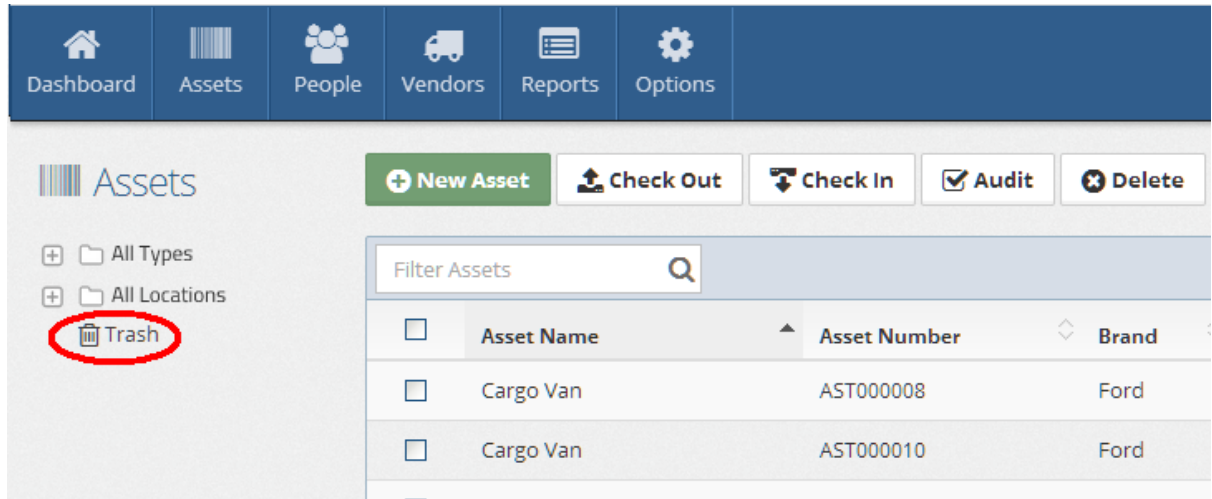
\*If the asset cannot be found ensure that you are searching the entire database by selecting the "All Types" and "All Locations" folders on the left.

## See Also

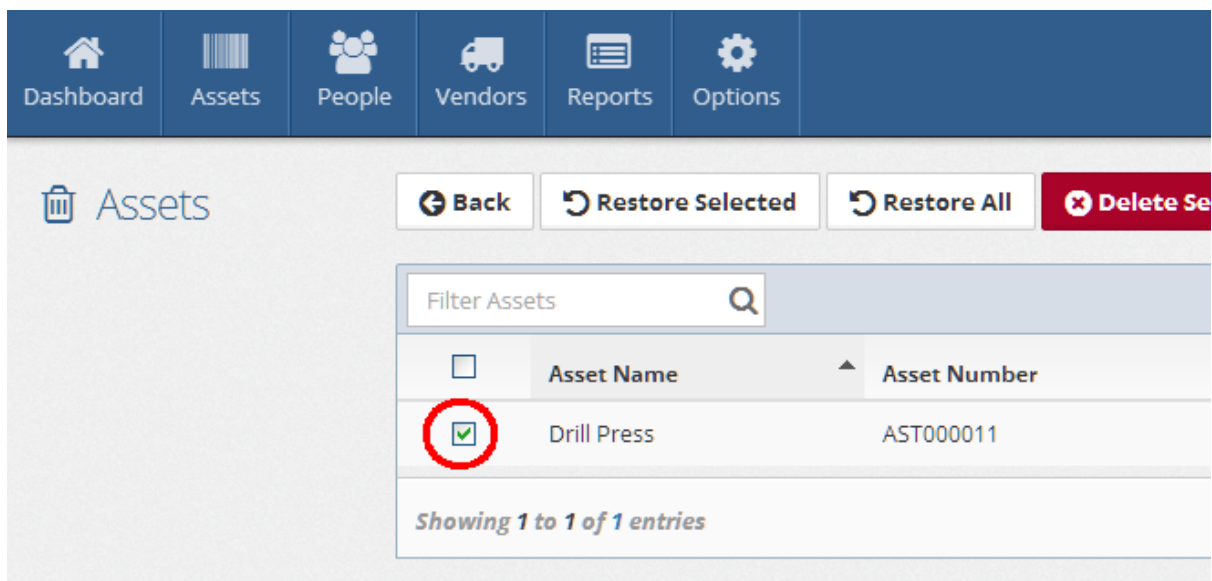
Asset Details

## 2.1.4 Restore Assets

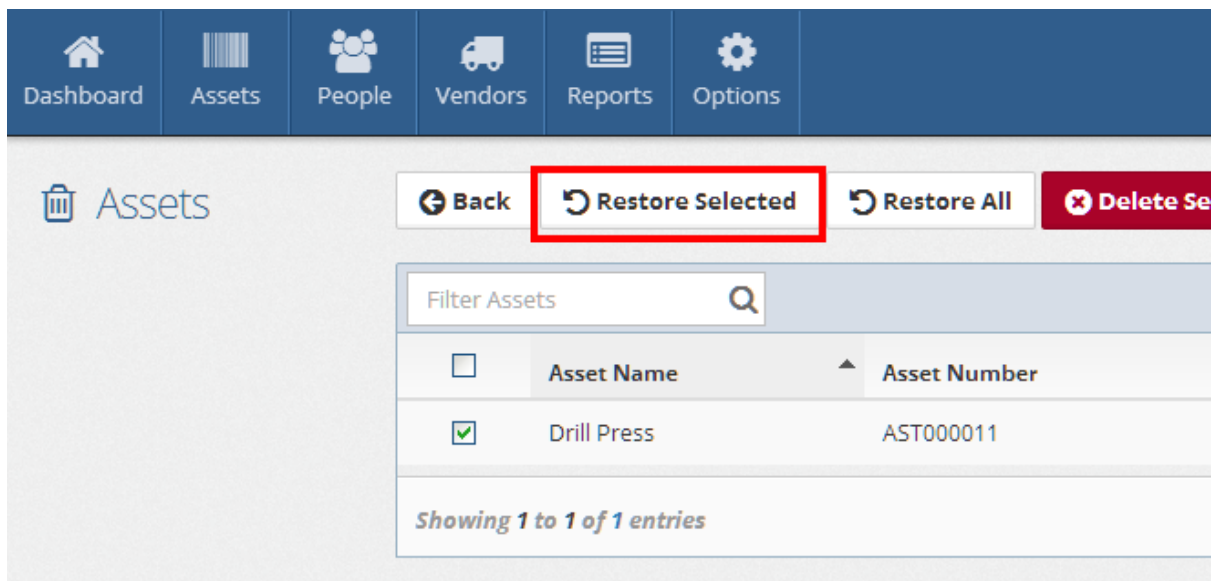
1. Click the **Trash** link located below the list of folders on the main Asset List page.



2. Locate the asset to restore in the Trash List, and **check the box** next to it.



3. Click the **Restore Selected** button to restore the selected asset record.



## See Also

Asset Details

### 2.1.5 Check-Out assets

There are different options available for checking out an asset depending on your needs and which page you are on. After completing the check out process, the "Checked Out To" (Custodian) field and the Return Due Date field will be updated, and a new entry will be added to the Asset History tab.

#### Option 1: Check-out assets from the Asset List page

1. Check the box or boxes for the asset(s) to check-out on the Asset List page.
2. Click the **Check-Out** button to open the Check-Out form. The form will open with the selected assets populated in the Check-Out list.
3. Select the person (custodian) for the item to be checked out to.
4. Set the Due Date, Status and Location values, and enter a Comment if required
5. Click the **Check Out** button to complete the check out process.

#### Option 2: Check-out assets without selecting the check boxes.

1. Click the **Check-Out** button on the Asset List page. The Check-Out form will open without any assets populated in the Check-Out list.
2. Select the person (custodian) for the item to be checked out to.
3. Place the cursor in the **Search for assets** field, and scan the barcodes or enter an asset name to search for. Add each item to the list of assets to check out.
4. Set the Due Date, Status and Location values, and enter a Comment if required
5. Click the **Check Out** button to complete the check out process.

#### Option 3: Check-out assets on the Personnel Detail page

1. Locate and open the Personnel record for the person to check items out to.



2. Select the Assets tab located on the Personnel Detail page, and then click the **Check Out** button to open the Check-out window.
3. With the cursor in the **Search for assets** box, begin scanning asset barcodes for the items to check out, or perform a search to add them to the check out list.
4. Set the Due Date, Status and Location values, enter a Comment if required.
5. Click the **Check Out** button to complete the check out process.

#### **Option 4: Check-out an individual Asset from the Asset Details page**

1. Locate and open the Asset Details page for the asset you would like to check out.
2. Click the **Check Out** button on the Asset Details page to open the check out form.
3. Select the person to check the asset out to.
4. Click the **Check Out** button at the bottom of the form to complete the check-out process.

### **2.1.6 Check-In assets**

There are several options available for checking in an asset, depending on your needs. After completing the check in process, the "Checked Out To" (Custodian) field and the Due Date field will be cleared, and a new entry will be added to the Asset History tab.

#### **Option 1: Check-in one asset**

1. On the Asset List page, place your cursor in the Filter Assets field, and then scan the asset barcode or enter the name of the asset being returned. Click the row containing the asset entry to open the asset detail page.
2. With the Asset page open, click the **Check In** button located near the top of the form to open the Check In window.
3. Set the new Status and Location values, enter a Comment if required.
4. Click the **Check In** button to complete the check in process.

#### **Option 2: Check-in several assets from one individual**

1. Locate and open the Personnel record for the person to check items out to.
2. On the Assets tab of the personnel form, select the assets to be checked in, and then click the **Check In** button to open the Check-In window.
3. Set the new Status and Location values, enter a Comment if required.
4. Click the **Check In** button at the bottom of the form to complete the check in process.

#### **Option 3: Check-in several assets from different individuals**

1. Click the **Check In** button on the main Asset List page.
2. With the cursor in the **Search for assets** box on the Check In window, scan or search for assets, and continue adding them to the check-in list as needed.
3. Set the new Status and Location values, enter a Comment if required.
4. Click the **Check In** button to complete the check in process for all items at once.

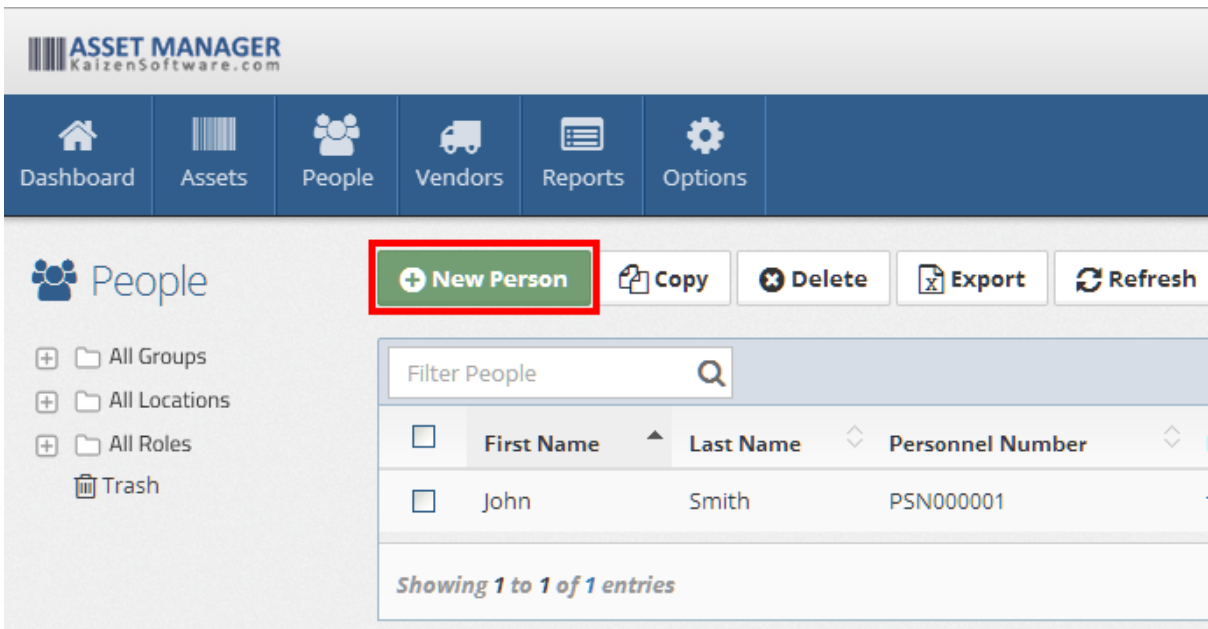
## 2.2 Manage Personnel Records

Select a topic below:

- Add New Personnel
- Edit Personnel
- Delete Personnel
- Restore Personnel

### 2.2.1 Add New Personnel

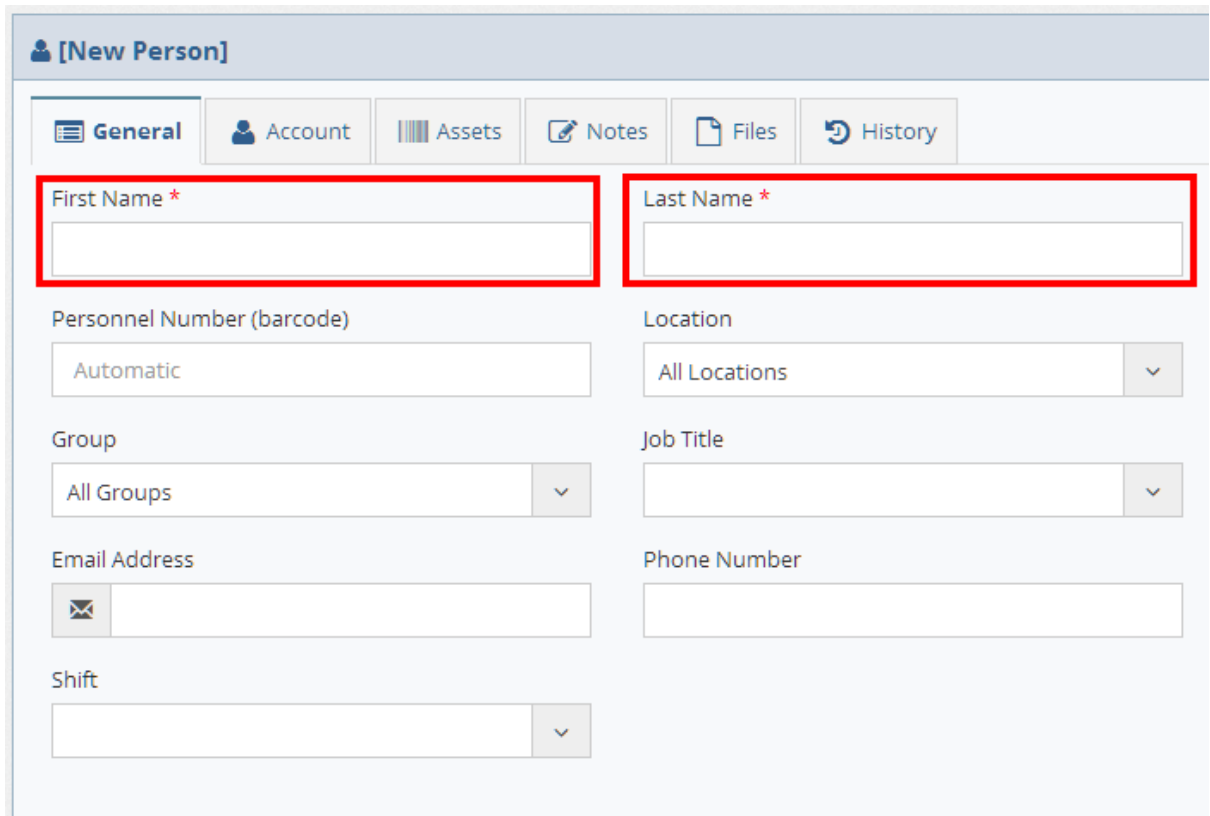
1. Click the **New Person** button located on either the People List page or an existing Personnel Detail page.



The screenshot displays the 'People' management interface. At the top, there is a navigation bar with icons for Dashboard, Assets, People, Vendors, Reports, and Options. Below this, the 'People' section is active, showing a '+ New Person' button highlighted with a red box. To the right of this button are 'Copy', 'Delete', 'Export', and 'Refresh' buttons. A search bar labeled 'Filter People' is present above a table. The table has columns for 'First Name', 'Last Name', and 'Personnel Number'. One entry is visible: John Smith with Personnel Number PSN000001. Below the table, it says 'Showing 1 to 1 of 1 entries'.

<input type="checkbox"/>	First Name	Last Name	Personnel Number
<input type="checkbox"/>	John	Smith	PSN000001

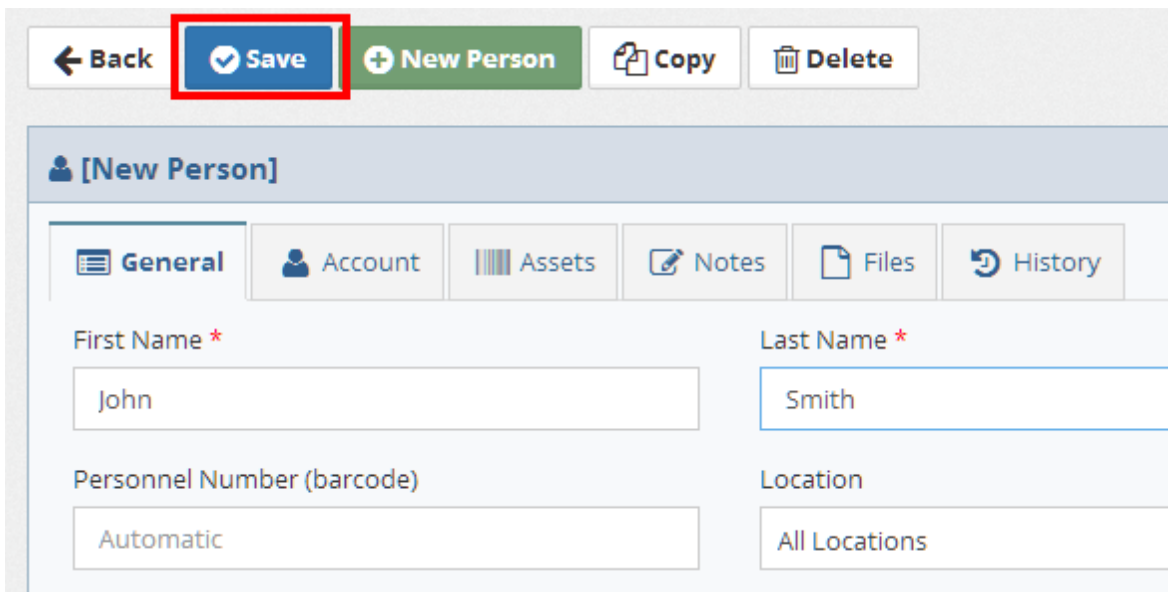
2. Fill in the required **First Name** and **Last Name** fields. You may leave the "Personnel Number (barcode)" field empty to have a new Personnel Number automatically created for you. Alternatively, you can enter a value manually by typing the value into the field.



The screenshot shows the 'New Person' form with the following fields and options:

- General** (selected), Account, Assets, Notes, Files, History
- First Name \*** (highlighted with a red box)
- Last Name \*** (highlighted with a red box)
- Personnel Number (barcode): Automatic
- Location: All Locations (dropdown)
- Group: All Groups (dropdown)
- Job Title: (dropdown)
- Email Address: (input field with envelope icon)
- Phone Number: (input field)
- Shift: (dropdown)

3. Click the **Save** button to save the Personnel record after filling in any other fields as necessary.



The screenshot shows the 'New Person' form with the following fields and options:

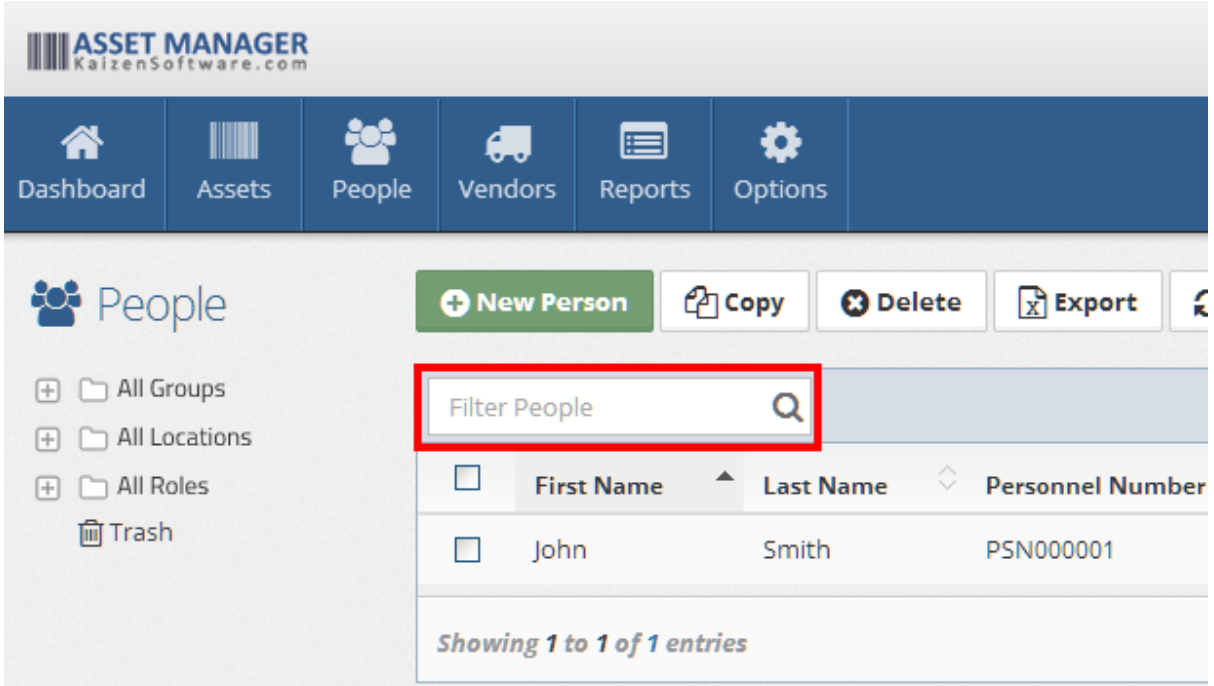
- Back**, **Save** (highlighted with a red box), **New Person**, **Copy**, **Delete**
- General** (selected), Account, Assets, Notes, Files, History
- First Name \***: John
- Last Name \***: Smith
- Personnel Number (barcode): Automatic
- Location: All Locations

## See Also

Personnel Details

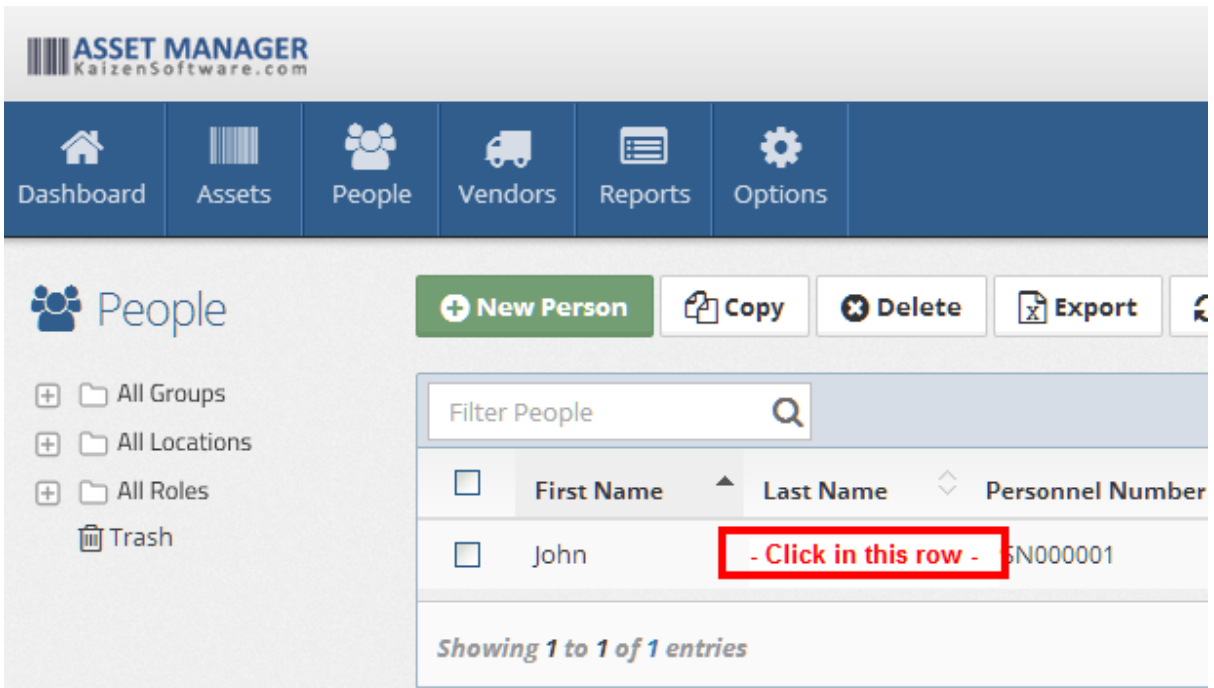
## 2.2.2 Edit Personnel

1. Locate the Personnel record by placing your cursor in the **Filter People** box on the People List page, and then scan the Personnel barcode or type a few characters of the Personnel Name or Number.



The screenshot shows the 'ASSET MANAGER' web interface. The top navigation bar includes 'Dashboard', 'Assets', 'People', 'Vendors', 'Reports', and 'Options'. The 'People' section is active, displaying a list of personnel. A search box labeled 'Filter People' is highlighted with a red rectangle. Below the search box, there are columns for 'First Name', 'Last Name', and 'Personnel Number'. A single entry is visible: 'John Smith' with 'PSN000001'. The text 'Showing 1 to 1 of 1 entries' is displayed at the bottom of the list.

2. Click on the row containing the Personnel record to open the Personnel Detail page.



The screenshot shows the 'ASSET MANAGER' web interface. The top navigation bar includes 'Dashboard', 'Assets', 'People', 'Vendors', 'Reports', and 'Options'. The 'People' section is active, displaying a list of personnel. A search box labeled 'Filter People' is visible. Below the search box, there are columns for 'First Name', 'Last Name', and 'Personnel Number'. A single entry is visible: 'John Smith' with 'PSN000001'. A red box highlights the row containing the Personnel record, with the text '- Click in this row -' overlaid. The text 'Showing 1 to 1 of 1 entries' is displayed at the bottom of the list.

3. Type or select a new value in the fields as needed, and then click the **Save** button.

The screenshot shows a user interface for adding a new person. At the top, there is a navigation bar with buttons for 'Back', 'Save', 'New Person', 'Copy', and 'Delete'. The 'Save' button is highlighted with a red border. Below this is a header for '[New Person]' with a person icon. Underneath are several tabs: 'General', 'Account', 'Assets', 'Notes', 'Files', and 'History'. The 'General' tab is active. The form contains four input fields: 'First Name \*' with the value 'John', 'Last Name \*' with the value 'Smith', 'Personnel Number (barcode)' with the value 'Automatic', and 'Location' with the value 'All Locations'.

\*If the Personnel record cannot be found ensure that you are searching the entire database by selecting the "All Groups" , "All Locations", and "All Roles" folders on the left.

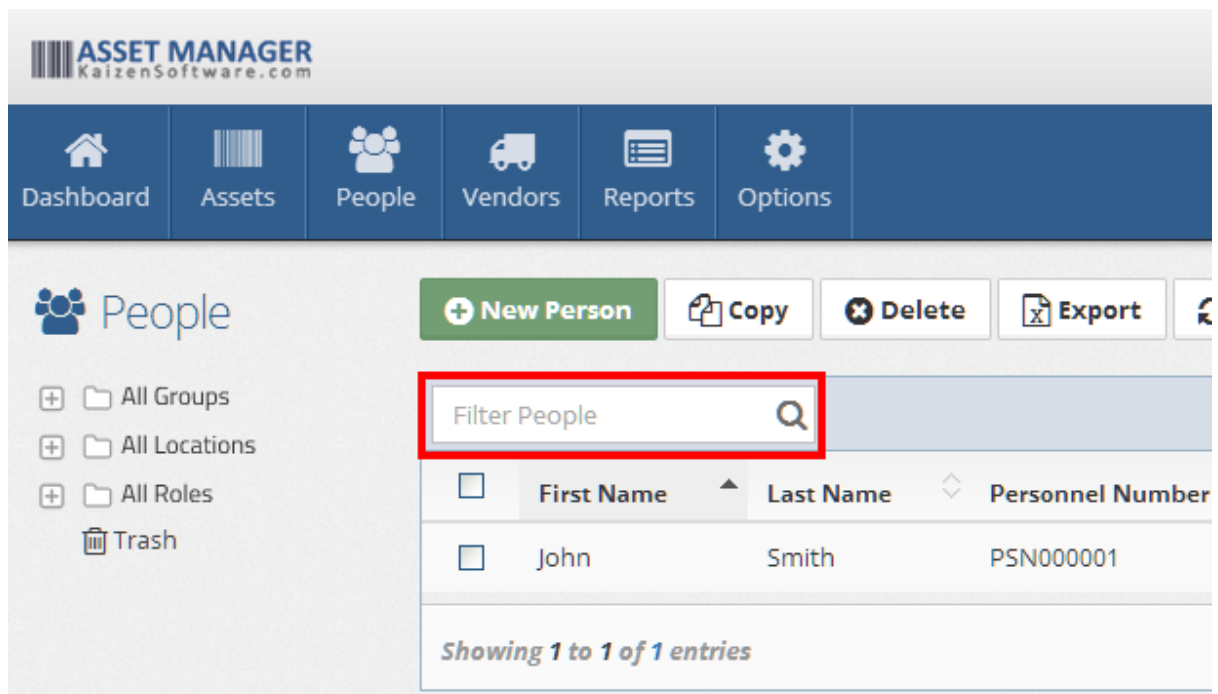
## See Also

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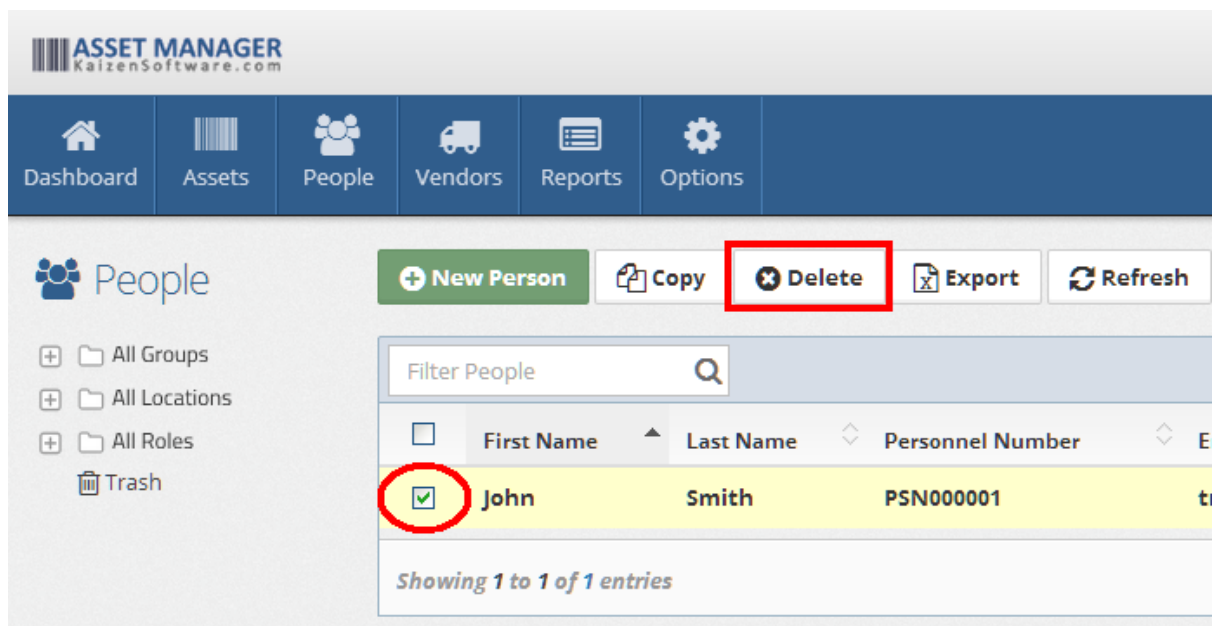
Personnel Details

### 2.2.3 Delete Personnel

1. Locate the Personnel record to delete by placing your cursor in the **Filter People** box on the Personnel List page, and then scan the Personnel barcode or type a few characters of the personnel name or number.



2. Place a **check in the box** next to the Personnel which you wish to delete, and then click the **Delete** button in the Personnel List toolbar, or open the Personnel Detail page, and then click the Delete button.



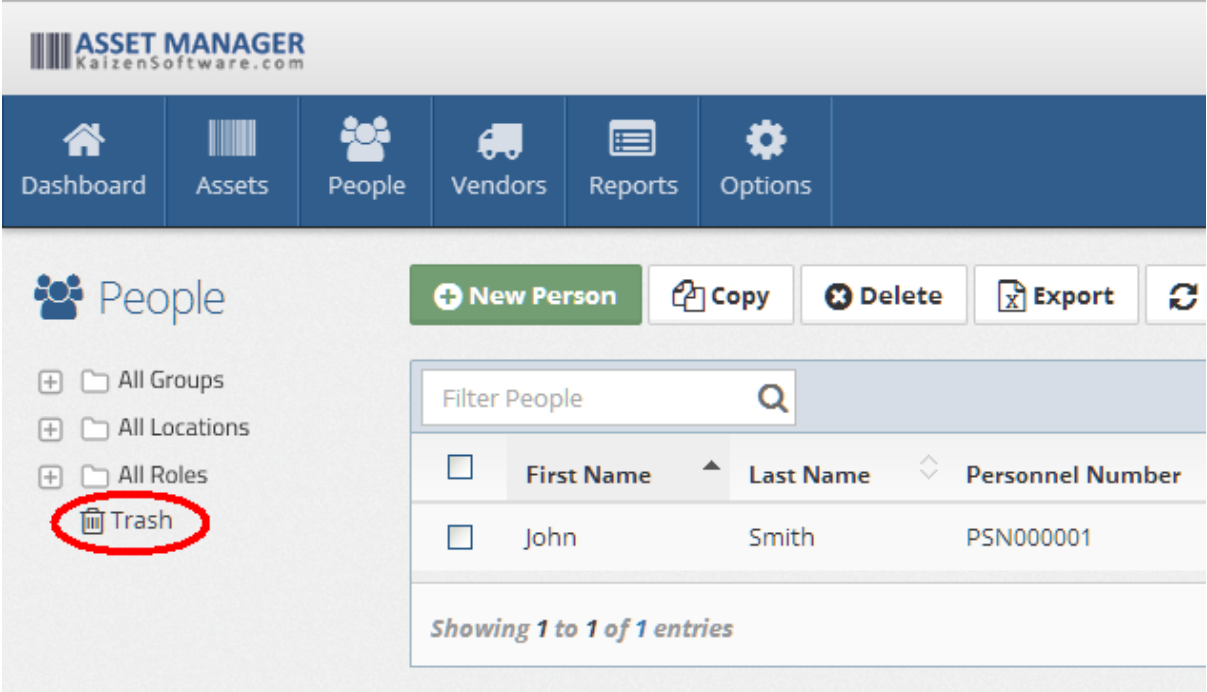
\*If the Personnel record cannot be found ensure that you are searching the entire database by selecting the "All Groups", "All Locations", and "All Roles" folders on the left.

## See Also

Personnel Details

## 2.2.4 Restore Personnel

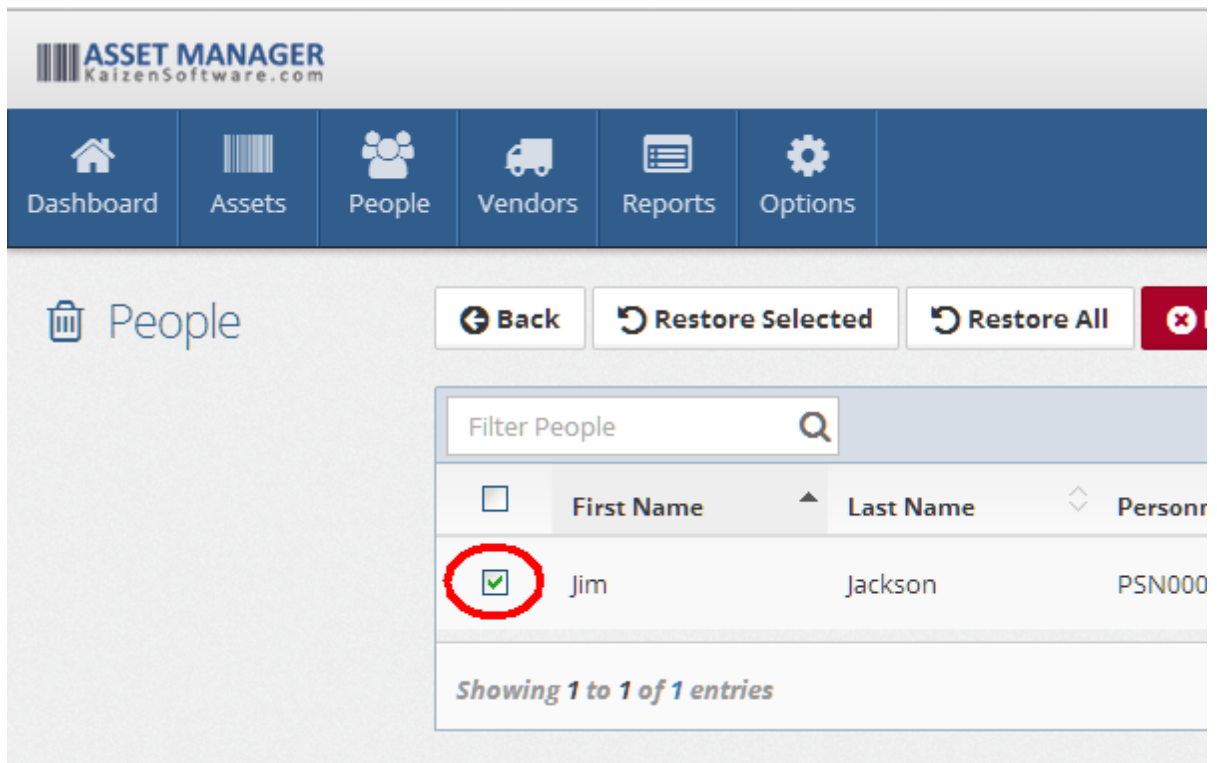
1. Click the **Trash** link located below the list of folders on the main People List page.



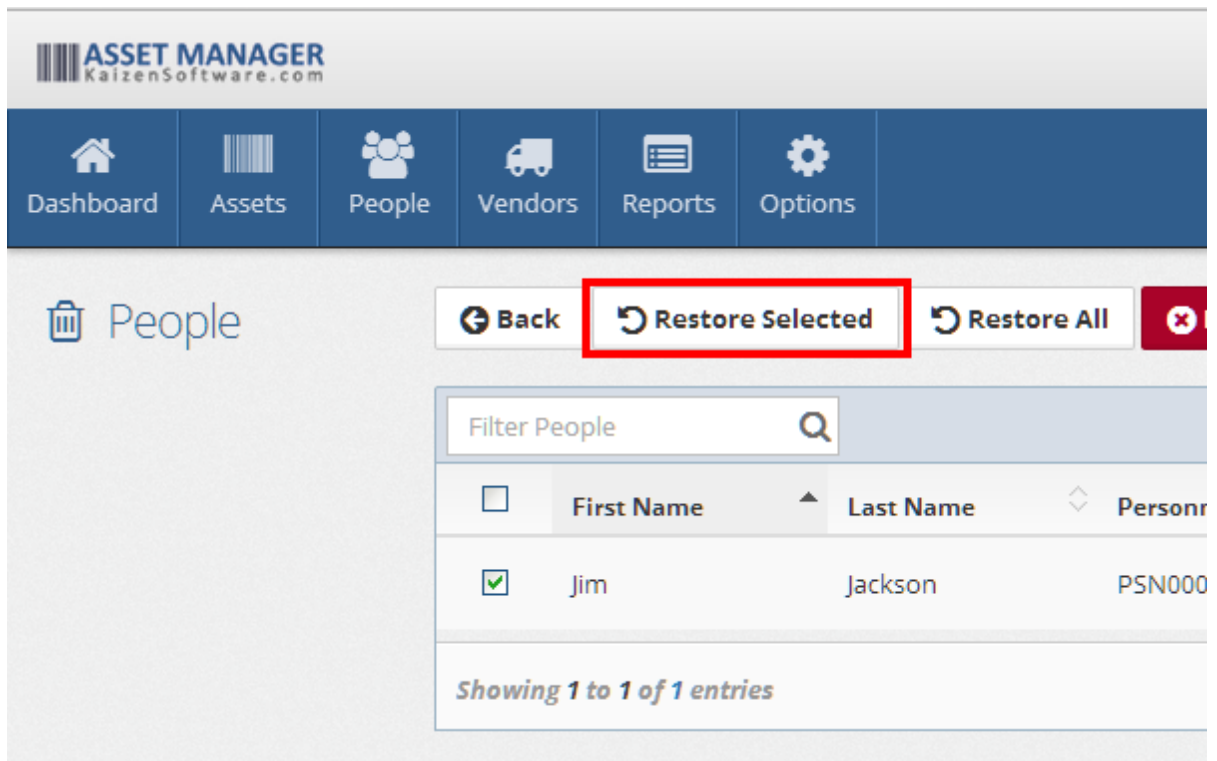
The screenshot displays the ASSET MANAGER interface. At the top, there is a navigation bar with icons for Dashboard, Assets, People, Vendors, Reports, and Options. Below this, the 'People' section is active, showing a sidebar with folders: All Groups, All Locations, All Roles, and Trash (circled in red). The main content area features a 'Filter People' search box and a table with columns: First Name, Last Name, and Personnel Number. A single entry is shown: John Smith, PSN000001. Below the table, it says 'Showing 1 to 1 of 1 entries'.

<input type="checkbox"/>	First Name	Last Name	Personnel Number
<input type="checkbox"/>	John	Smith	PSN000001

2. Locate the Personnel record to restore in the Trash List, and **check the box** next to it.



3. Click the **Restore Selected** button to restore the selected Personnel record.



## See Also



Personnel Details

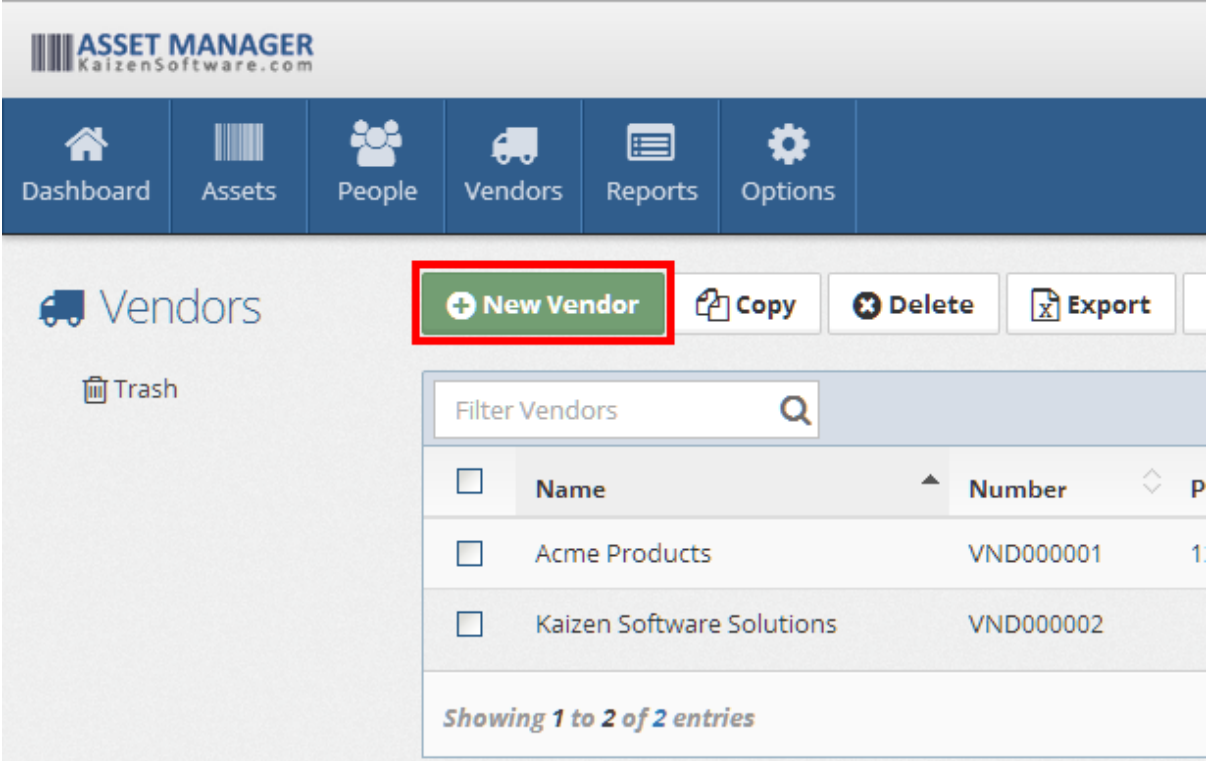
## 2.3 Manage Vendor Records

Select a topic below:

- Add New Vendors
- Edit Vendors
- Delete Vendors
- Restore Vendors

### 2.3.1 Add New Vendors

1. Click the **New Vendor** button located on either the Vendor List page or an existing Vendor Detail page.



The screenshot shows the ASSET MANAGER interface. The top navigation bar includes Dashboard, Assets, People, Vendors, Reports, and Options. The main content area is titled 'Vendors' and features a 'Trash' icon, a search bar labeled 'Filter Vendors', and a table of vendor records. A green button with a plus sign and the text 'New Vendor' is highlighted with a red box. To its right are buttons for 'Copy', 'Delete', and 'Export'. The table lists two vendors: 'Acme Products' with ID 'VND000001' and 'Kaizen Software Solutions' with ID 'VND000002'. The status 'Showing 1 to 2 of 2 entries' is displayed at the bottom of the table.

<input type="checkbox"/>	Name	Number	P
<input type="checkbox"/>	Acme Products	VND000001	1.
<input type="checkbox"/>	Kaizen Software Solutions	VND000002	

2. Fill in the **Vendor Name** field on the new Vendor page. This is the only Required field. You may leave the "Vendor Number (barcode)" field empty to have a new Vendor Number automatically created for you. Alternatively, you can enter a value manually by typing the value into the field.

**[New Vendor]**

General Assets Notes Files History

Vendor Name \*

Vendor Number  Phone Number

Contact Name  Email Address  Mailing Address

City  State/Province  Postal Code

3. Click the **Save** button to save the Vendor record after filling in any other fields as necessary.

← Back **Save** + New Vendor Copy Delete

**Kaizen Software Solutions (VND000002)**

General Assets Notes Files History

Vendor Name \*  Vendor Number  Phone Number

Contact Name  Email Address  Mailing Address

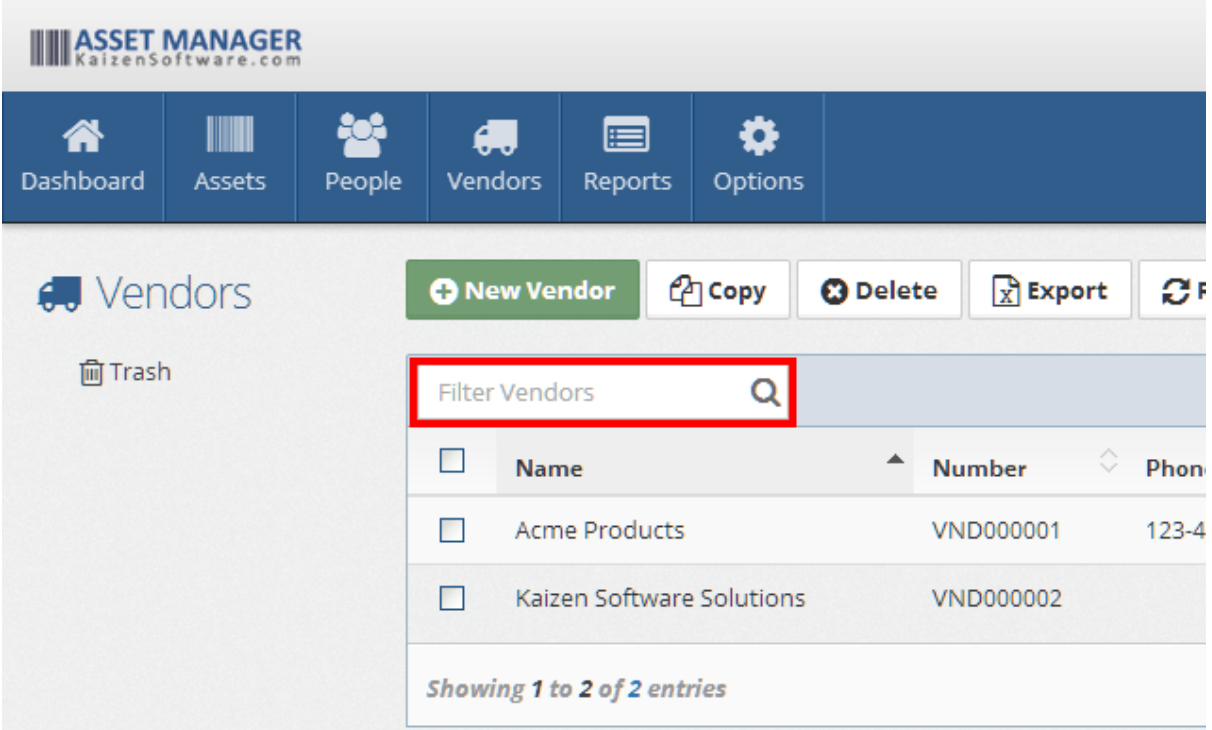
City  State/Province  Postal Code

## See Also

[Vendor Details](#)

## 2.3.2 Edit Vendors

1. Locate the Vendor record to edit by placing your cursor in the **Filter Vendors** box on the Vendor List page, and then type a few characters of the Vendor Name or Number.



The screenshot shows the ASSET MANAGER interface. The top navigation bar includes Dashboard, Assets, People, Vendors, Reports, and Options. The main content area is titled 'Vendors' and features a 'Trash' icon, a 'New Vendor' button, and buttons for 'Copy', 'Delete', 'Export', and 'Refresh'. A search box labeled 'Filter Vendors' is highlighted with a red border. Below the search box is a table with columns for Name, Number, and Phone. The table contains two entries: 'Acme Products' with number 'VND000001' and 'Kaizen Software Solutions' with number 'VND000002'. The footer of the table indicates 'Showing 1 to 2 of 2 entries'.

<input type="checkbox"/>	Name	Number	Phone
<input type="checkbox"/>	Acme Products	VND000001	123-4
<input type="checkbox"/>	Kaizen Software Solutions	VND000002	

*Showing 1 to 2 of 2 entries*

2. Click on the row containing the Vendor record to open the Vendor Detail page.

The screenshot shows the 'Vendors' page in the Asset Manager web application. The top navigation bar includes 'Dashboard', 'Assets', 'People', 'Vendors', 'Reports', and 'Options'. Below the navigation bar, there are buttons for '+ New Vendor', 'Copy', 'Delete', 'Export', and 'Refresh'. A search bar labeled 'Filter Vendors' is present. The main content area displays a table of vendors with columns for 'Name', 'Number', and 'Phone'. The table contains two entries: 'Acme Products' and 'Kaizen Software Solutions'. The 'Kaizen Software Solutions' row is highlighted with a red box, and the text '- Click The Row To Open -' is written inside the box. Below the table, it says 'Showing 1 to 2 of 2 entries'.

<input type="checkbox"/>	Name	Number	Phone
<input type="checkbox"/>	Acme Products	VND000001	123-4
<input type="checkbox"/>	Kaizen Software Solutions		

3. Type or select a new value in the fields as needed, and then click the **Save** button.

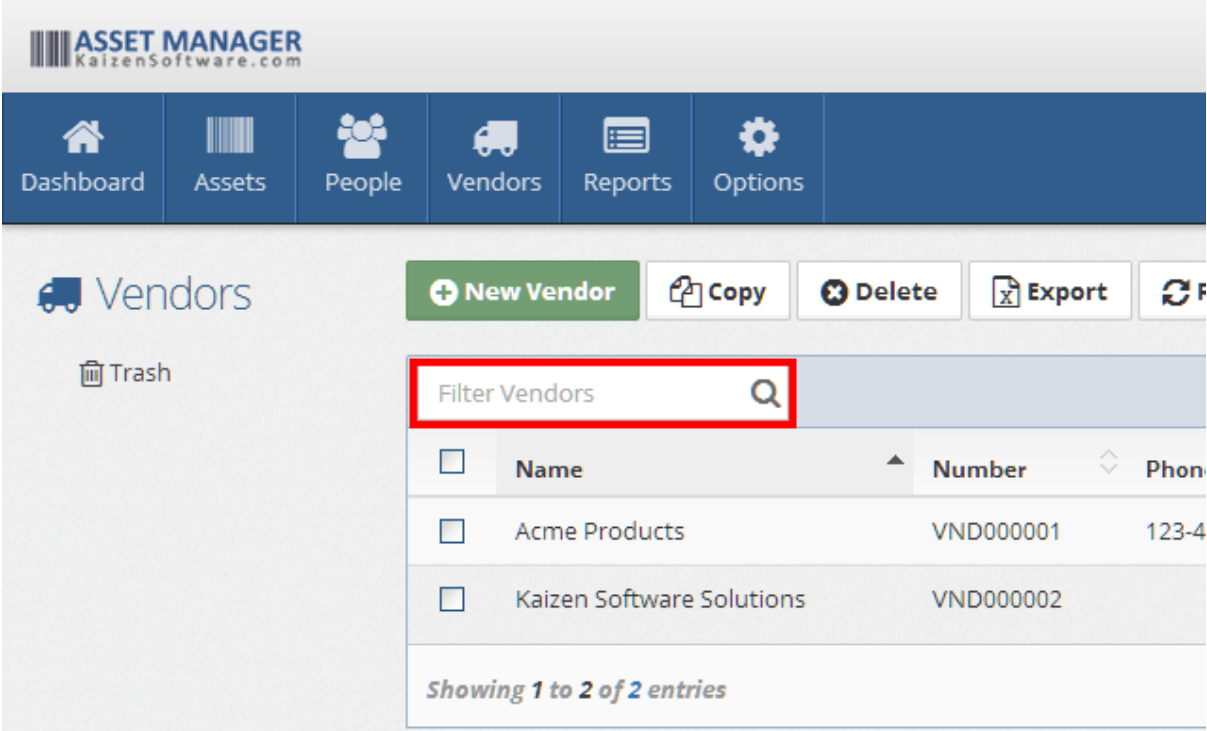
The screenshot shows the 'Kaizen Software Solutions (VND000002)' vendor details form. The top navigation bar includes 'Back', 'Save', 'New Vendor', 'Copy', and 'Delete'. The 'Save' button is highlighted with a red box. Below the navigation bar, there are tabs for 'General', 'Assets', 'Notes', 'Files', and 'History'. The form contains several input fields: 'Vendor Name \*' (Kaizen Software Solutions), 'Vendor Number' (VND000002), 'Phone Number', 'Contact Name', 'Email Address' (with an envelope icon), 'Mailing Address', 'City', 'State/Province', and 'Postal Code'.

## See Also

Vendor Details

### 2.3.3 Delete Vendors

1. Locate the Vendor record to delete by placing your cursor in the **Filter Vendors** box on the Vendor List page, and then type a few characters of the Vendor Name or Number.

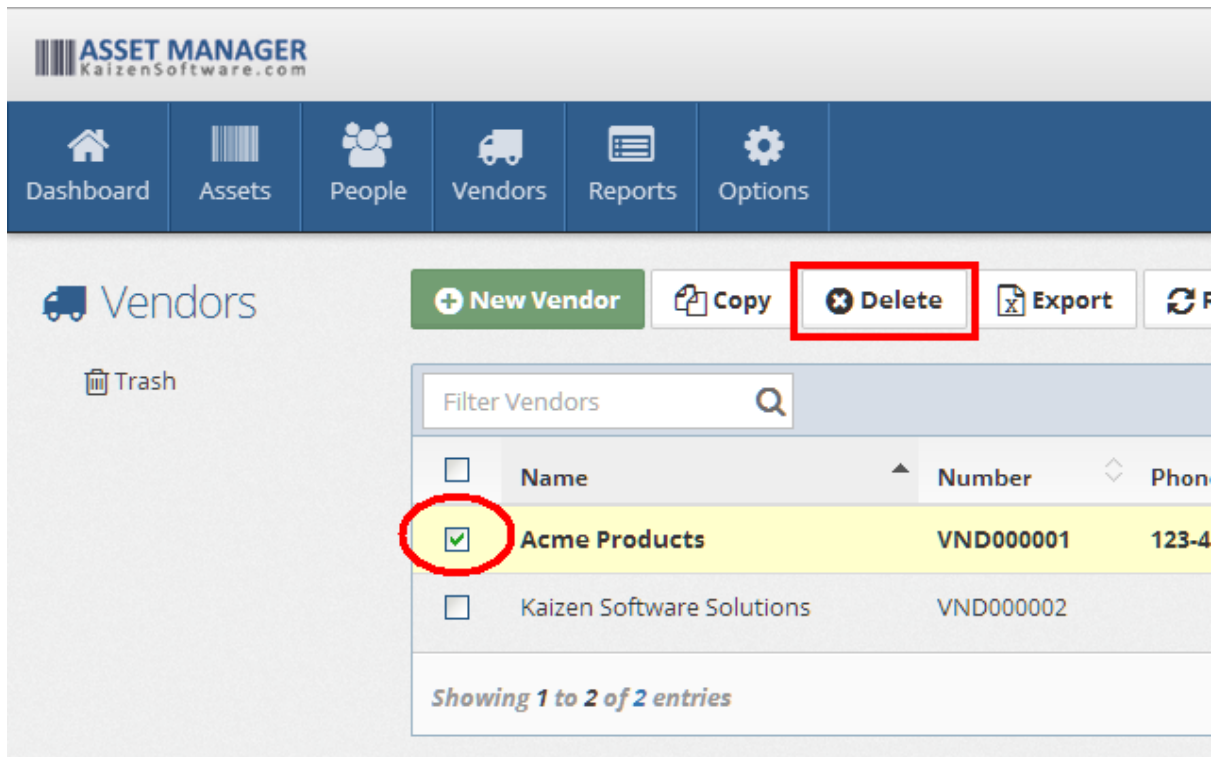


The screenshot shows the ASSET MANAGER interface. The top navigation bar includes Dashboard, Assets, People, Vendors, Reports, and Options. The main content area is titled "Vendors" and features a toolbar with buttons for "New Vendor", "Copy", "Delete", "Export", and "Refresh". Below the toolbar is a "Filter Vendors" search box, which is highlighted with a red border. The search results table has columns for Name, Number, and Phone. Two vendors are listed: "Acme Products" (VND000001) and "Kaizen Software Solutions" (VND000002). A "Trash" icon is visible on the left side of the page.

<input type="checkbox"/>	Name	Number	Phone
<input type="checkbox"/>	Acme Products	VND000001	123-4
<input type="checkbox"/>	Kaizen Software Solutions	VND000002	

Showing 1 to 2 of 2 entries

2. Place a check in the box next to the Vendor record which you wish to delete, and then click the **Delete** button in the Asset List toolbar, or open the Vendor Detail page, and then click the "Delete" button.



ASSET MANAGER  
KaizenSoftware.com

Dashboard Assets People Vendors Reports Options

Vendors

+ New Vendor Copy Delete Export Refresh

Trash

Filter Vendors

<input type="checkbox"/>	Name	Number	Phone
<input checked="" type="checkbox"/>	Acme Products	VND000001	123-4
<input type="checkbox"/>	Kaizen Software Solutions	VND000002	

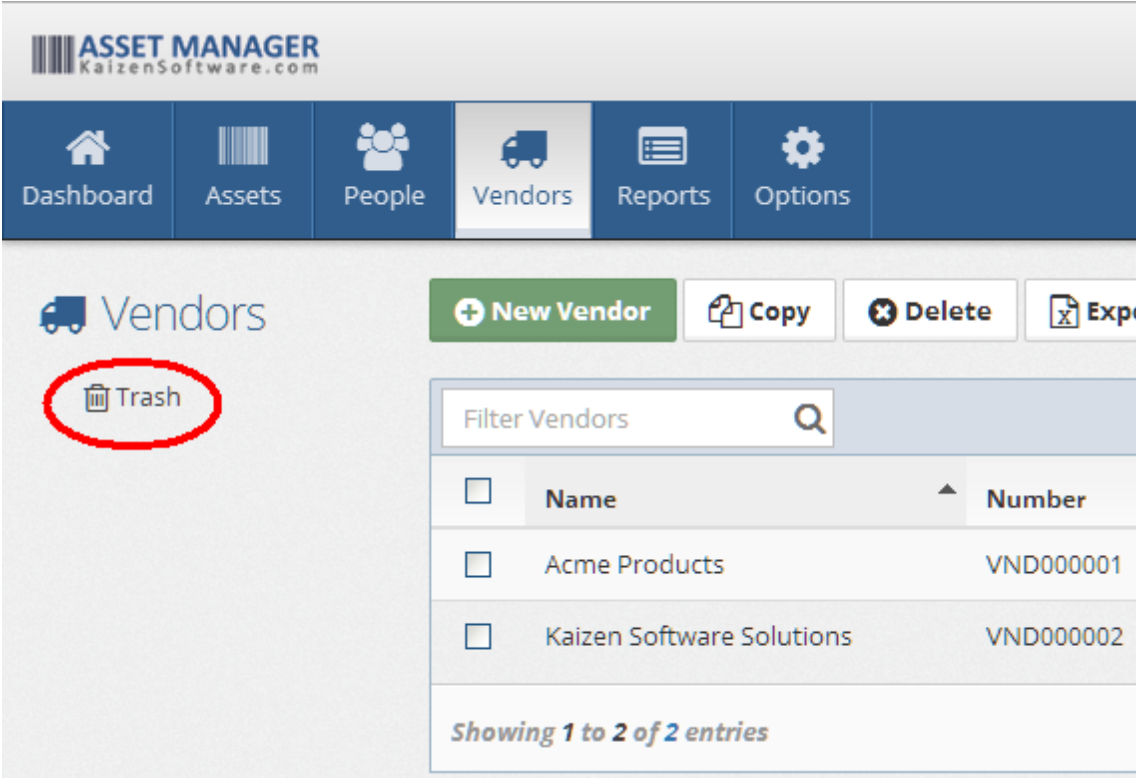
Showing 1 to 2 of 2 entries

## See Also

[Vendor Details](#)

### 2.3.4 Restore Vendors

1. Click the **Trash** link located below the list of folders on the main Vendor List page.

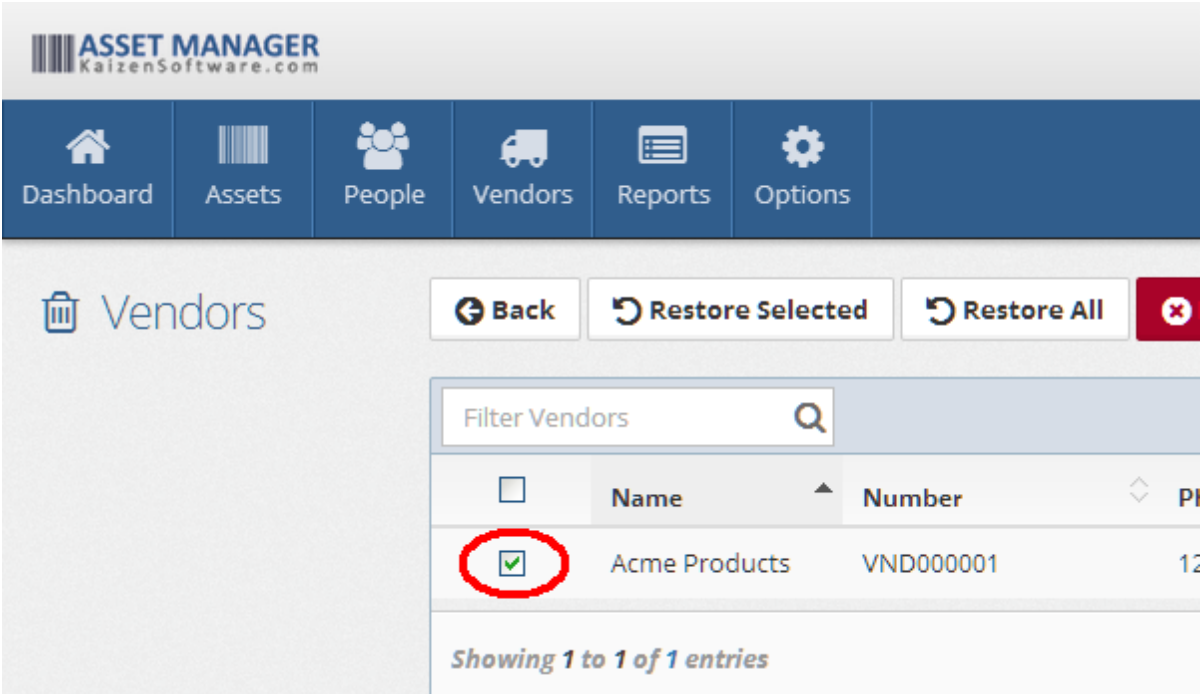


The screenshot shows the ASSET MANAGER interface with the Vendors page selected. The navigation bar includes Dashboard, Assets, People, Vendors, Reports, and Options. The Vendors page has a header with a truck icon and the word "Vendors". Below the header, there are buttons for "New Vendor", "Copy", "Delete", and "Export". A "Trash" icon is circled in red. Below the trash icon is a search bar labeled "Filter Vendors" and a table with columns "Name" and "Number".

<input type="checkbox"/>	Name	Number
<input type="checkbox"/>	Acme Products	VND000001
<input type="checkbox"/>	Kaizen Software Solutions	VND000002

Showing 1 to 2 of 2 entries

2. Locate the Vendor record to restore in the Trash List, and **check the box** next to it.

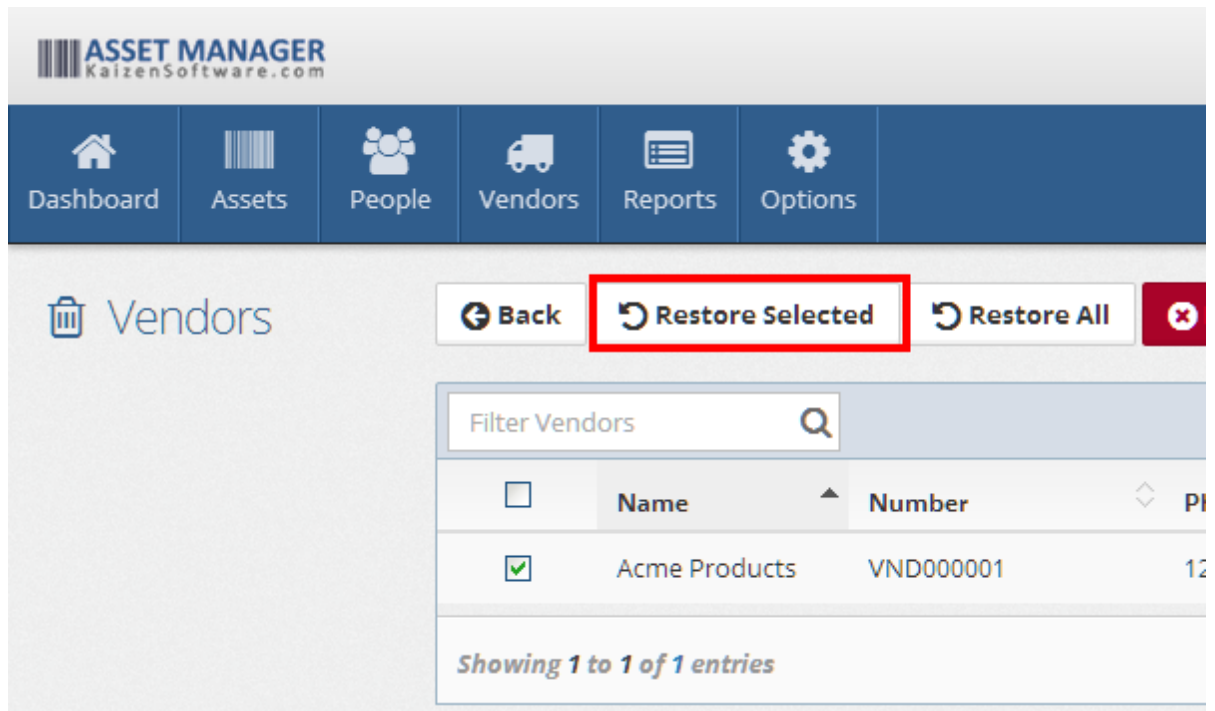


The screenshot shows the ASSET MANAGER interface with the Vendors page selected. The navigation bar includes Dashboard, Assets, People, Vendors, Reports, and Options. The Vendors page has a header with a trash icon and the word "Vendors". Below the header, there are buttons for "Back", "Restore Selected", "Restore All", and a red "X" button. A search bar labeled "Filter Vendors" is present. Below the search bar is a table with columns "Name", "Number", and "PI".

<input type="checkbox"/>	Name	Number	PI
<input checked="" type="checkbox"/>	Acme Products	VND000001	12

Showing 1 to 1 of 1 entries

3. Click the **Restore Selected** button to restore the selected asset record.



## See Also

Vendor Details

## 3 Reference

- Asset Details
- Personnel Details
- Vendor Details

### 3.1 Asset Details

#### Toolbar Buttons

Field or Form Element	Description
Save button	Click the Save button to save the asset.
New Asset button	Click the New Asset button to begin a new asset record.
Check Out button	Click the Check Out button to open the check out form with the current asset added to the check out list.
Audit button	Click the Audit button to add an Audit record to the asset history.



Copy button	Click the Copy button to create a copy of the record.
Delete button	Click the Delete button to delete the asset. This will move the asset record to the trash list. It will not be permanently deleted until it is deleted from the trash.

## General Tab Fields

Field or Form Element	Description
Asset Name	A text field which contains the name of the asset.
Asset Number (barcode)	The Asset Number is a unique number which identifies the asset record in the database. This number is also used for the barcode. Leave this field blank to have Asset Manager assign the number for you, or set the value to an existing asset number. If you already have a barcode on the asset, you may place the cursor in the Asset Number field and scan the barcode to fill in the Asset Number for you.
Asset Type	A selection field which contains the list of <b>Asset Types</b> . You may add a new asset type by right-clicking on the folder in the hierarchy on the left, and then selecting the "New" context menu option.
Manufacturer	A text field which contains the name of the Manufacturer.
Brand	A text field which contains the name of the Brand.
Model	A text field which contains the name of the Model.
Individual or Bulk?	Click on the Individual or Bulk button to select whether this asset is tracked individually, or whether this is a bulk asset containing multiple items, each with potentially a separate location, custodian, and serial number.
Picture Box	Click the Add Picture link to add a picture of the asset.

## Details Tab Fields

Field or Form Element	Description
Status	A selection field which contains the list of Status values. You can add, edit, or remove the available status values by going to the main Options page, and then clicking on the "Selection Fields" link on the left.
Checked Out To	This selection field contains a list of the personnel

	in the system. The person selected here is the Custodian for the asset. You may select a person from the list, or perform a Checkout operation to record the details in the History.
Return By	A date field to record when the asset is due to be returned.
Location	A selection field which contains the list of <b>Locations</b> . You may add a new location by right-clicking on the folder in the hierarchy on the left, and then selecting the "New" context menu option.
Serial Number	A text field containing the serial number for an asset.
Condition	A selection field which contains the list of Condition values. Manage the values in this field as described in the "Status" description above.
Audit Date	Date when this asset was audited.
Include In Audits checkbox	Check this box if the asset should be included in the Audit reports.

## Purchasing Tab Fields

Field or Form Element	Description
Vendor	A selection field which contains the list of Vendors. Add, edit, and delete the available values on the main Vendors list.
Purchase Price	The purchase price of the asset.
Purchased	The date when the asset was purchased.
Purchase Order Number	The Purchase Order Number (if any) used for the purchase.
Account Code	The Account Code for this purchase.
Warranty End	The date when the Warranty ends.

## Notes Tab

The Notes tab is a place where you can enter free-form rich text notes.

## Files Tab

The Files tab contains a list of files which have been uploaded for the Asset record.

## History Tab

The History tab contains a list of updates for the Asset record.

## 3.2 Personnel Details

### General Tab

Field Name	Description
First Name	The first name of the person.
Last Name	The last name of the person.
Personnel Number	You may leave the field blank to have Asset Manager assign a personnel number, or manually enter a personnel number.
Location	The location of the person.
Group	The Group selection field is the name of the Personnel Group that the person belongs to.
Job Title	The Job Title for the person.
Email Address	The email address for the person.
Phone Number	The phone number for the person.
Shift	The person's shift (1st Shift, 2nd Shift, etc.). You can set the values for this selection field on the Options page - Selection Fields.
Picture	Click the Add Picture link to select an employee picture. To remove a picture, click the Delete link.

### Account Tab

Field Name	Description
Login Name	You may enter a different login name if the user will not be using their email address to login.
System Role	<ul style="list-style-type: none"> <li>• <b>Viewer:</b> The default role is "Viewer". A viewer can view all areas within Asset Manager but cannot make changes to any data.</li> <li>• <b>Auditor:</b> An "Auditor" has all of the viewing rights that the Viewer role has + the ability to add Audit records to assets.</li> <li>• <b>Custodian:</b> A "Custodian" has Viewer rights + the ability to Check In/Out assets.</li> <li>• <b>Data Administrator:</b> A "Data Administrator" has access to view, edit, add, and delete assets, personnel, vendors, and selection fields. They cannot make changes to Company Options.</li> <li>• <b>System Administrator:</b> A "System Administrator" has full access to all areas of the system including Company Options.</li> </ul>
Timezone	Select the timezone for the user.

Set Password button	If you are a System Administrator, you can use this button to set the user's password.
Login Fail Count	N/A
Transfer System Administrator link	Use this link to transfer your System Administrator permissions to another user.

## Assets Tab

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The Assets tab contains a list of assets currently checked out to the person.

## Notes Tab

---

The Notes tab is a place where you can enter free-form rich text notes.

## Files Tab

---

The Files tab contains a list of files which have been uploaded for the Personnel record.

## History Tab

---

The History tab contains a list of updates for the Personnel record.

## 3.3 Vendor Details

### General Tab - Fields and Form Elements

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Field Name	Description
Vendor Name	The name of the vendor.
Vendor Number	
Phone Number	The main phone number for the vendor.
Website	The website address for the vendor. Click the button next to the field to open the website.
Contact Name	The main contact name for the vendor.
Email Address	The email address for the vendor. Click the button next to the field to open a new email message to the vendor.
Address fields	The mailing address for the vendor.

## Assets Tab

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The Assets tab on the Vendor form displays a list of assets which have been assigned to this Vendor. You can assign an asset to a Vendor by selecting the Vendor from the selection field on the Asset Form - Purchasing tab.

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## Notes Tab

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The Notes tab is a place where you can enter free-form rich text notes.

## Files Tab

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The Files tab contains a list of files which have been uploaded for the Vendor.

## History Tab

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The History tab contains a list of updates for the Vendor record.