



Caltech

Institute Business
Systems | IMSS

Equipment Mobile Inventory *User Guide*



Table of Contents

Overview	2
EMI Access	3
User Types	3
Additional Access.....	3
Logging In to the Application	4
Application Pages.....	6
Performing Inventory.....	7
Asset Search by Room.....	10
Creating and Updating Users.....	11
Searching for a User	11
Creating a User	11
Updating a User	12
Additional Access.....	13
User Activity.....	14

Overview

The main purpose of the Equipment Mobile Inventory (EMI) application is to perform inventory management using mobile devices. EMI enables campus users to:

- Scan barcodes attached to campus equipment to search for and view details about the equipment in the Oracle Fixed Assets module; and
- Update the equipment’s location and/or inventory date.

EMI enforces rules so that users will only have access to inventory to certain equipment.

Questions relating to equipment data (e.g., why am I the assignee, equipment in the wrong room, etc.) or requests for additional help may be directed to PropertyServices@caltech.edu.



EMI Access

All users can view equipment information. However, users can only perform inventory on certain equipment, which is based on user type and Additional Access functionality.

User Types

- **Admin User:** Has access to view and inventory any asset, view the Users page, and create/update user accounts.
- **General User:** Has access to view and inventory any asset within his/her/their organization. Does not have access to the Users page.
- **Super User:** Has access to view and inventory any asset. Does not have access to the Users page.
- **View Only User:** Has access to view any asset. Does not have access to inventory any asset or view the Users page.

Additional Access

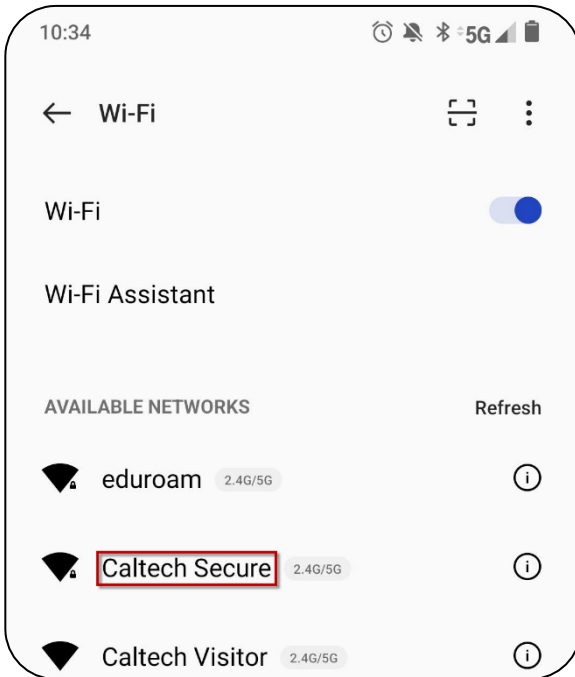
A General User only has access to inventory assets within his/her/their organization. If necessary, the user may be granted access to inventory another group's equipment.



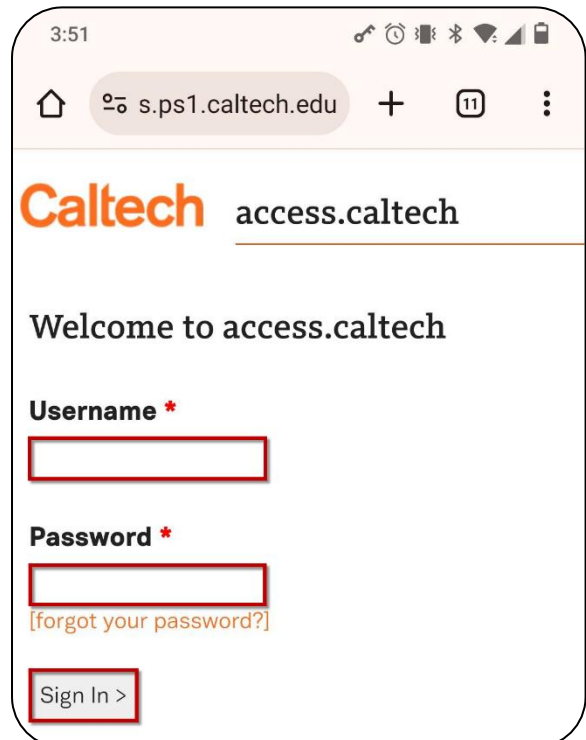
Logging In to the Application

NOTE: This application is intended to be used on mobile devices. Because device type, browser type and settings can vary, these instructions may not exactly reflect what you see on your mobile device.

1. On your mobile device, connect to Caltech Secure Wi-Fi (using your Caltech username and password).



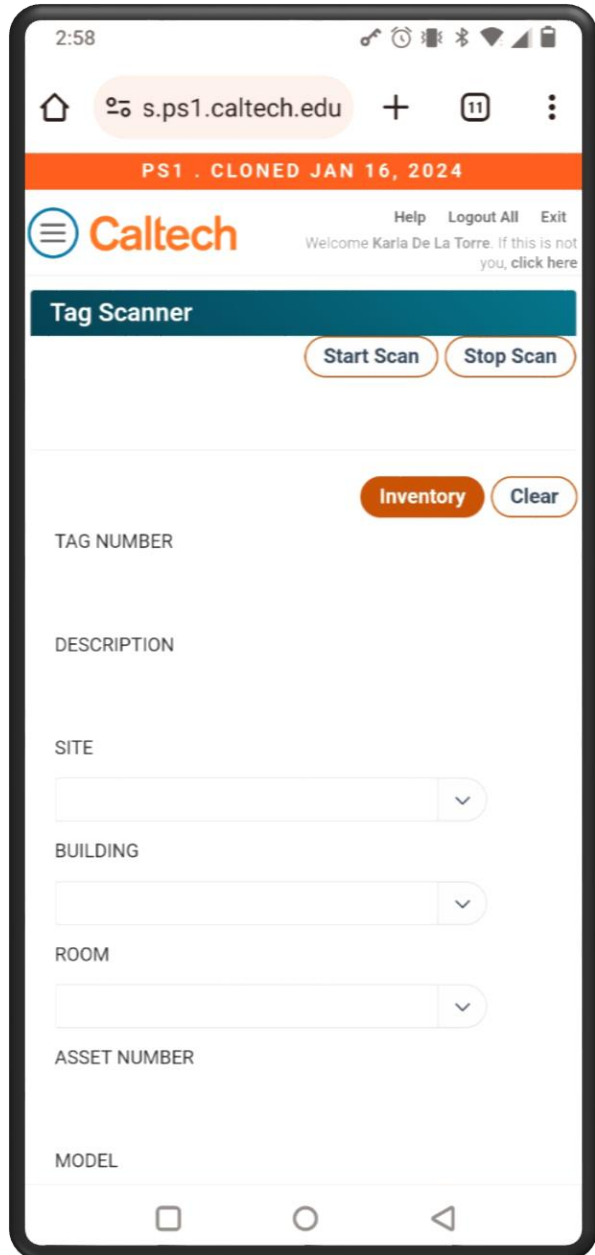
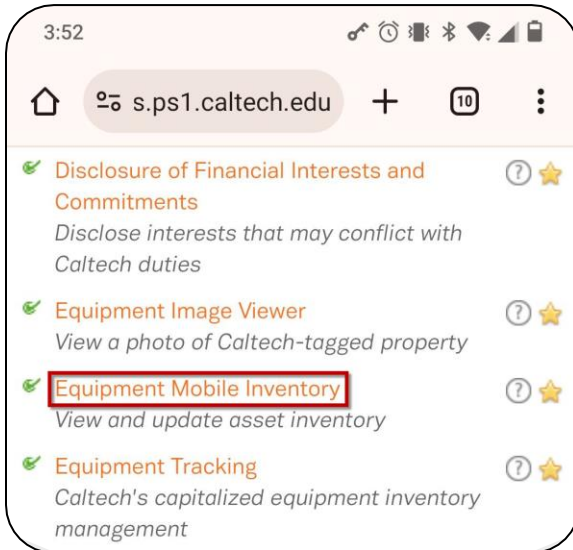
2. Open a browser and type access.caltech.edu in the address bar.
3. Enter your access.caltech credentials and click on **Sign In**.





4. Locate and click on **Equipment Mobile Inventory** in the Administrative Services section.

The landing page will appear on our screen.



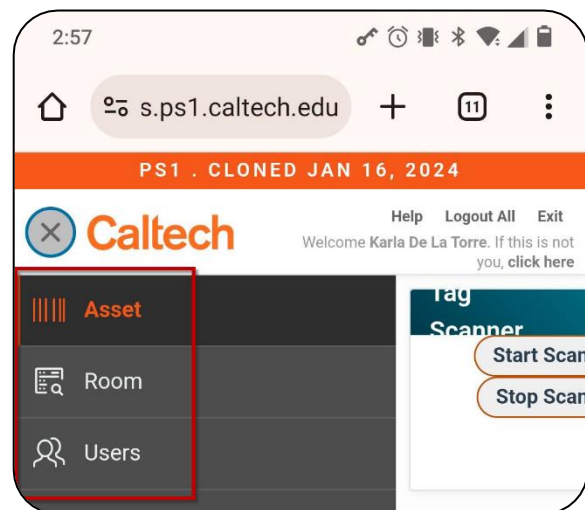
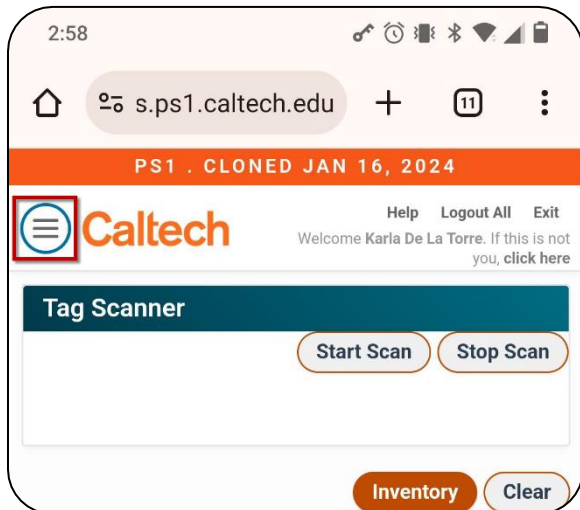


Application Pages

The Equipment Mobile Inventory application consists of only three pages: Asset, Room, and Users.

- The **Asset** page serves as the landing page and where inventory is performed.
- The **Room** page is used to retrieve a list of assets found within a campus location.
- The **Users** page is used to create and update user accounts for the application.

Clicking on the hamburger icon on the top left of the screen shows the navigation menu with the three pages.

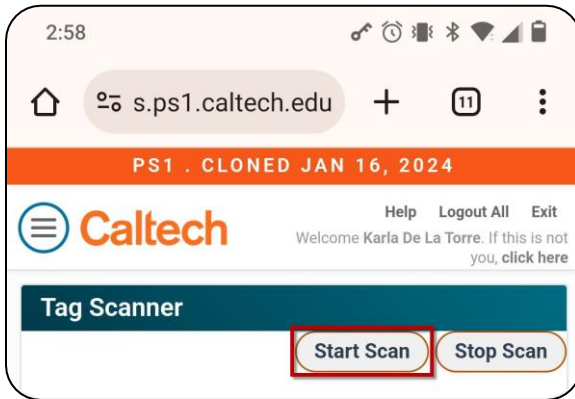




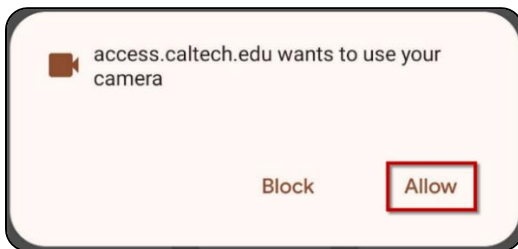
Performing Inventory

The Asset page is used to perform inventory on campus. If you are ready to begin the inventory process:

1. Click **Start Scan**.

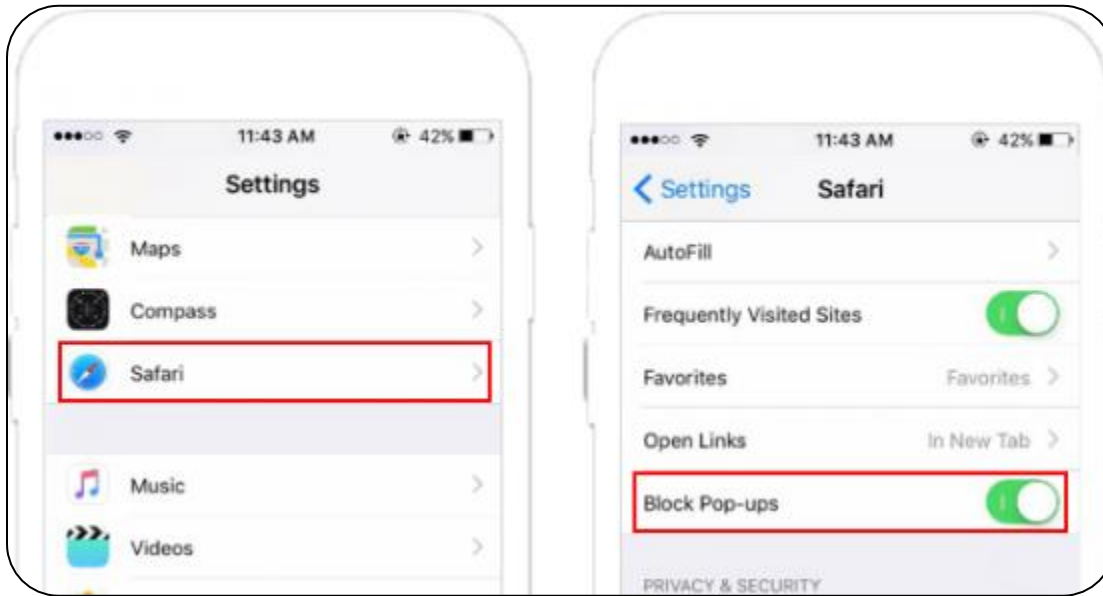


2. A popup message will appear asking to access your camera. Click on **Allow**.



If a pop-up message does not appear on your screen, you may need to enable pop-ups in your device settings. For example, for Safari:

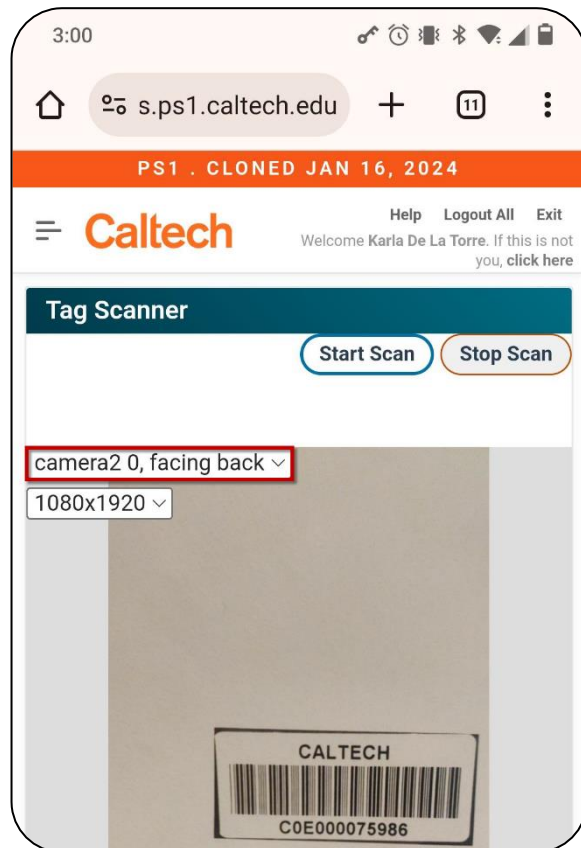
- a. Open the Settings app.
- b. Scroll down and tap on “Safari”.
- c. Turn off the toggle next to “Block Pop-ups”.



3. Aim the camera at a CALTECH barcode attached to a piece of equipment as in the sample image below. If the equipment has no CALTECH barcode, please contact PropertyServices@caltech.edu as the equipment must be registered and tagged with them first.

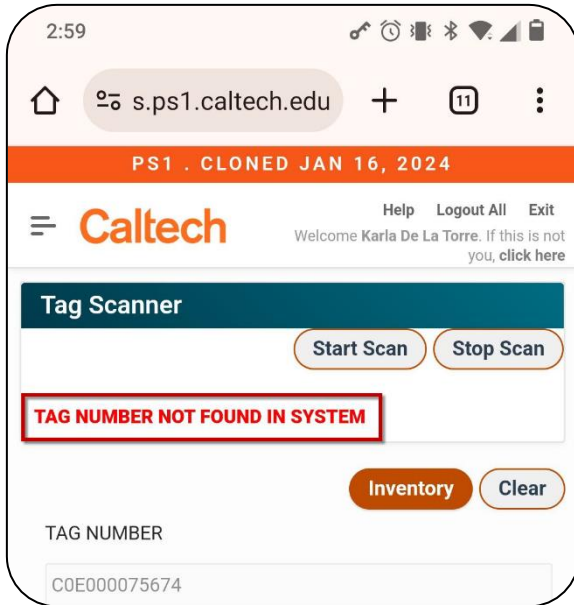
Notes:

- The scanner will start trying to identify barcodes.
- The application was designed to scan in the vertical position.
- You may need to vary the distance between the barcode and the camera. Typically, about 4 to 6 inches works best.
- You do not have to keep clicking on Start Scan. As you hover over barcodes, the scanner will continue trying to read barcodes until one is read successfully.
- You may need to try different back facing cameras to get the best view.
- Clicking on **Stop Scan** will close the camera.

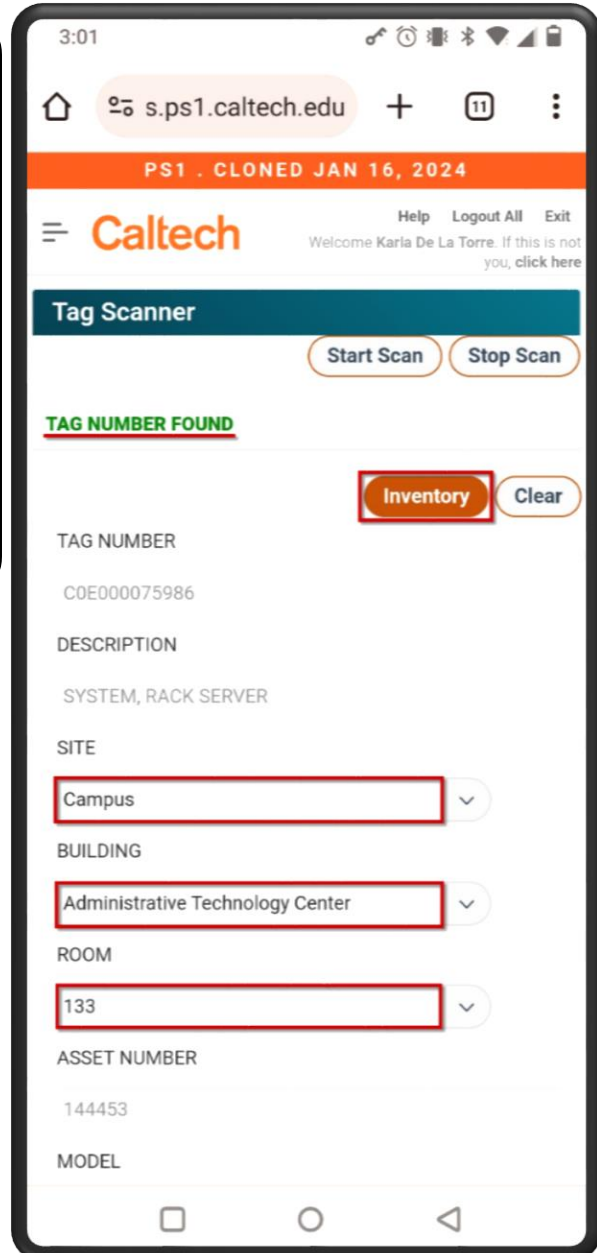




- If the tag number is not found in the system, you will receive the “TAG NUMBER NOT FOUND IN SYSTEM” message. This could be because the asset is retired or the tag number needs to be updated in the system. For questions on equipment not found in the system, please contact PropertyServices@caltech.edu.



- If the tag number is found in the system, you will receive the “TAG NUMBER FOUND” message and the asset’s information will be populated in the fields.



4. Perform Inventory:

- a. If the asset’s location has not changed, simply click on **Inventory** to complete the process.
- b. If the asset’s location has changed, update the **SITE**, **BUILDING**, and **ROOM** accordingly and click **Inventory** to complete the process.

If you do not see the “Inventory” button and do not have access to change the location, you do not have access to inventory the asset. This may be due to having view-only access or the



asset belongs to a different group. To request access to inventory the asset, contact an application owner (Ernest Katacha, Theresa Slowskei).

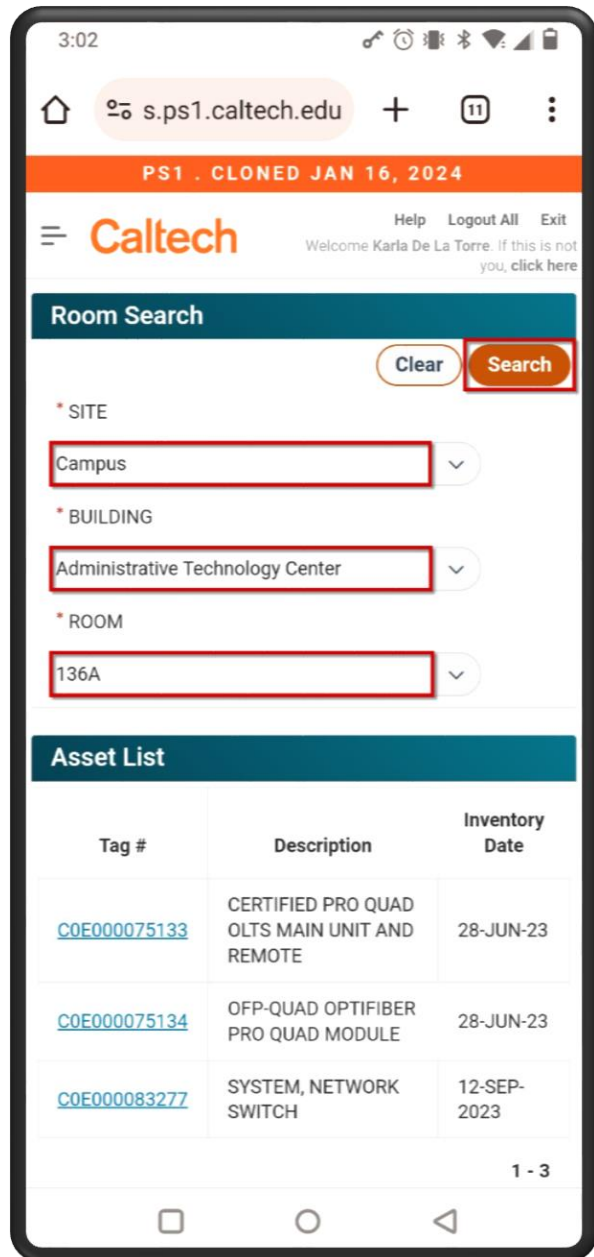
Inventory updates will not be reflected in the application until the next day (after the CITFA Nightly Sync Assets concurrent program runs).

Asset Search by Room

The Room page is used to obtain a list of assets in any Caltech location.

Use the **SITE**, **BUILDING**, and **ROOM** drop down menus to select a Caltech location and click on **Search**. A list of assets found within the location will be displayed.

Each **Tag #** is hyperlinked to a page showing more Information about that asset.





Creating and Updating Users

The Users page is used for managing the application’s users. Only Admin type users have access to this page and can view, create, update, and grant additional access to users.

Searching for a User

To search for a user:

1. Type the user’s name in the NAME field. The names will be filtered based on your entry.
2. Select the desired name and click on **Search**.

If the selected person is an existing user, his/her/their user information will be displayed on the screen.

Otherwise, you will get a “User doesn’t exist” message.

Suggestion: Use the **Clear** button to clear the fields on the screen before searching for another user.

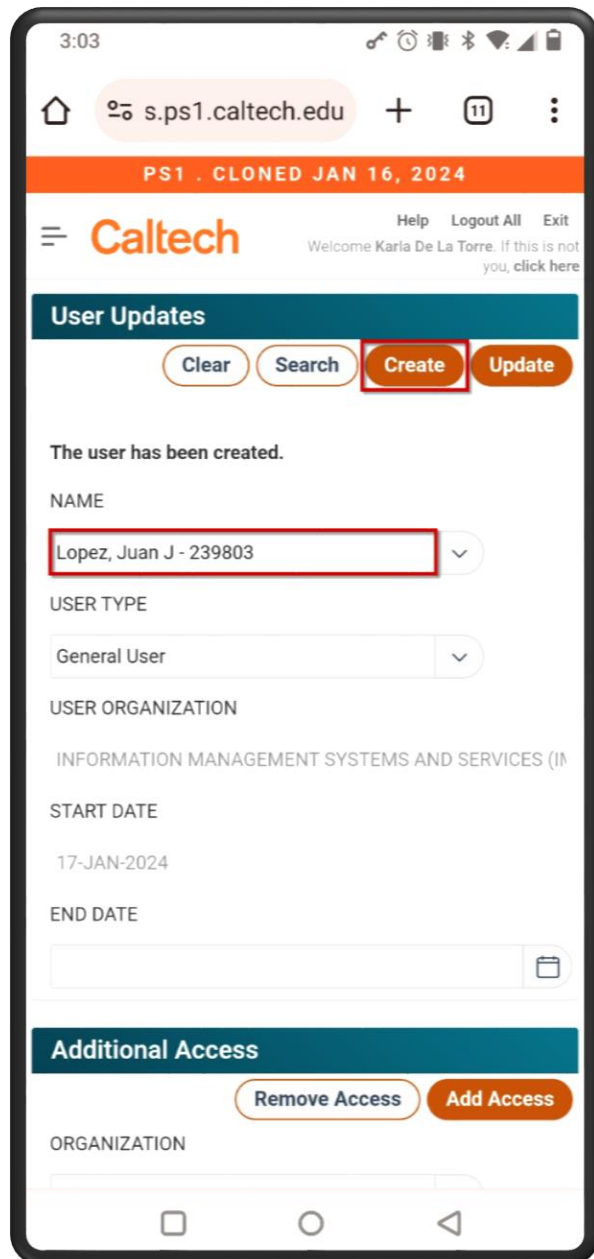
Creating a User

To create a new user:

1. Type the new user’s name in the **NAME** field.
2. Select the desired name and click on **Create**.

If successful, you will receive a message indicating that the “user has been created.”

Otherwise, you will receive a message indicating that the user already exists.





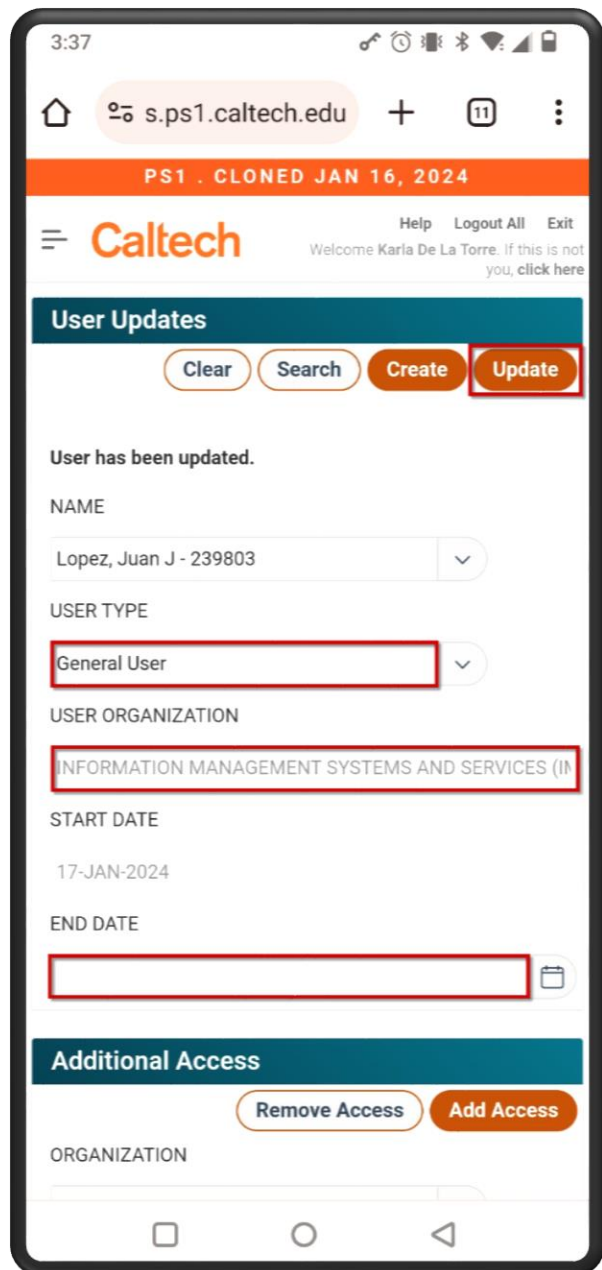
Updating a User

To update a user:

1. Search for the user as shown in the [Searching for a User](#) subsection above.
2. Once found, update the user's information as needed and click on **Update**.

Possible updates:

- **USER TYPE** – Refer to the descriptions of all user types in the [User Types](#) subsection above.
- **USER ORGANIZATION** – If the user has moved to a different organization, simply click the UPDATE button and the organization will be updated automatically.
- **END DATE** – This date can be entered or removed as needed. If the date is in the past, the user will not have access to the application.





Additional Access

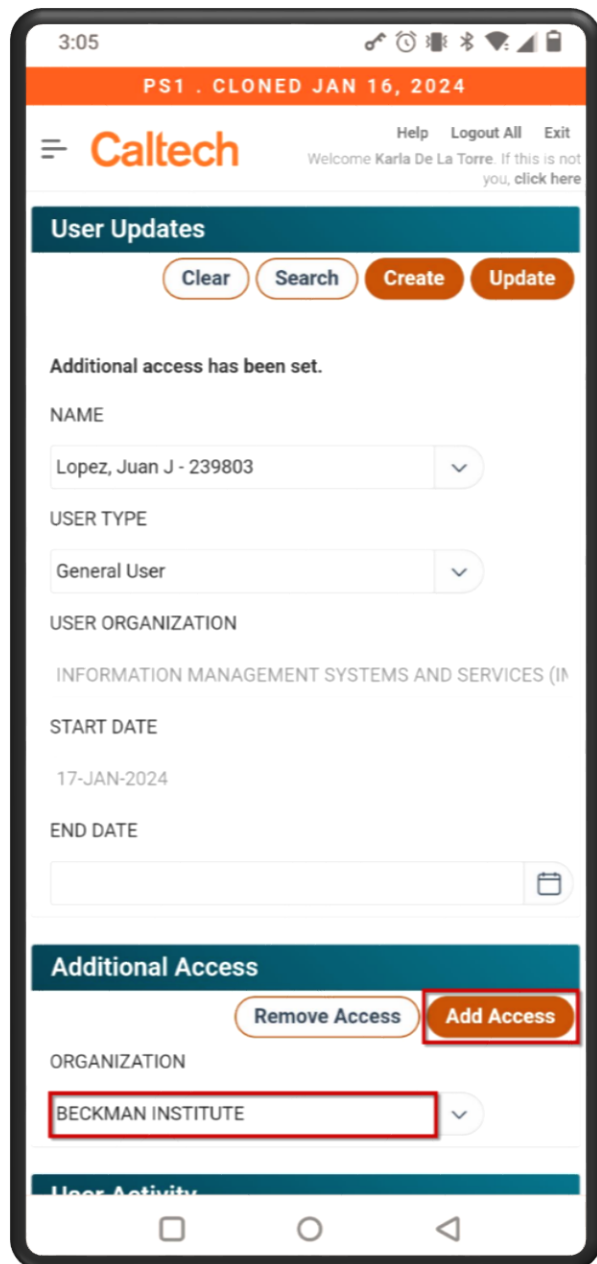
A General User only has access to inventory assets within his/her/their organization. If necessary, the user may be granted access to inventory another group’s equipment.

To grant additional access:

1. Search for the user as shown in the [Searching for a User](#) subsection above.
2. In the Additional Access section of the page, select the **ORGANIZATION** and click **Add Access**.

To remove additional access:

1. Search for the user as described in the [Searching for a User](#) subsection above.
2. Select the **ORGANIZATION** and click **Remove Access**.





User Activity

At the bottom of the User page, is a list of assets. The list corresponds to the assets the user has recently inventoried through the Equipment Mobile Inventory application.

The **Tag Numbers** are hyperlinked to a page showing more information about that asset.

