CrossPointe
Asset Management
User’s Manual
revised July 2018
Table of Contents

Access to Asset Management------------------------- 1 – 6
Search for Assets------------------------------------- 7 – 14
Update Building/Room/Serial Number------- 15 – 17

On-line Transfers
  Sending Site
    Designee-------------------------------------- 18 – 21
    Deleting a Transfer-------------------------- 22
    Custodian----------------------------------- 23 – 25
    Deleting a Transfer-------------------------- 26

  Receiving Site
    Designee------------------------------------- 27 – 30
    Custodian----------------------------------- 31 – 33

View Pending Asset Transfers------------------- 34 – 37

View Completed Asset Transfers
  Individual Transfer-------------------------- 38 – 41
  All Transfers------------------------------ 42 – 44

Reports
  Selecting a Report to Run---------------------- 45 – 50
  Asset Additions Report----------------------- 51
  Missing Assets Report----------------------- 52
  Print Inventory Report------------------------ 53
  Printing a Report----------------------------- 54 – 56
Access to Asset Management
Navigate to the Brevard Public Schools Home Page via Internet Explorer.

Select Staff and click on CrossPointe.
Use your AS400 User ID and password to log into CrossPointe online.
Select **CrossPointe: Student and Business Systems**.
If you have access to more than one cost center you must choose the specific center you want to access before entering into the Asset Management system:

Select **Change Defaults**
Highlight the numbers in the Sign-on Center field
Input the site number you want to access
Select **Apply**
Select **OK**
Your available choices will be highlighted in blue. Select the **Asset Management** option.

**HELPFUL HINT:** The Information Line appears at the top of the page of all panels within Asset Management.
Under the All Options menu click on **Asset Management** and then click on **Search for Assets**.
At this point the user has the option to search for assets by any search criteria listed on this panel; for example by asset number, purchase order number, serial number, etc.

The **Path** field does not have to be filled in but allows for a more efficient search. Put your cursor in the Path field and press **F1** to view and select the following available choices:

A: Asset – search by asset number  
I: Item – search by item code  
C: Center – search by center number

The **Disposition** field is very important. All active assets are in disposition **10**; however, you may be searching for an item that has been retired so a blank disposition field is necessary for some searches.

Only the first character is needed to search by **Purchase Order** or **Serial Number**. Nine characters are needed to search by **Asset**. When searching by asset number, add zeros to the beginning if your tag # is not nine characters long.

After the search criteria are entered, press the **Enter** key on your keyboard. To view all assets that match your search criteria press the **Page Down** key on your keyboard until the Information Line says, ‘No additional records.’ **All** assets will appear including active, stolen, missing, and retired.

Use the **Page Up** and **Page Down** keys on your keyboard or the green arrows on the panel to scroll through the asset listing.
To view the detail of an item, highlight the line and press the **F11** key or double-click on the highlighted line.

By clicking Export, you can export this list into an Excel format. To assure all data has been loaded into Excel, you must wait for the Excel Interface box to appear. It will say ‘Excel Interface Finished Successfully.’ Page 14 shows an example of data exported to Excel.
This panel shows the detail of the asset. The information in the **Definition** tab automatically appears. The **Notes** and **Audit History** tabs are also accessible to view (see pgs 12-13).

If the asset was purchased prior to January 2009 the PO Year field will have a value of 1901. If the asset was purchased in January 2009 or after, the PO Year field will contain the correct year. For assets purchased prior to FY09, refer to the Acquired date just above the PO Year.

To go back to the Search for Assets panel, press the **F11** key or click on **Back to List**.
If there are any notes associated with the asset they will appear on this panel. Only Property Control staff can add notes to the asset records.
The Audit History tab shows all of the changes that have been made to the asset record since the Asset Management system was implemented in January 2009. Use the Page Down key on your keyboard or the green arrows on the panel to view any additional history.
This is a sample list exported from Excel. **All** assets will appear including active, missing, stolen, and retired assets.

If you limited your disposition code on the search panel the export will only show assets in that disposition.

<table>
<thead>
<tr>
<th>Asset ID</th>
<th>Description</th>
<th>Item</th>
<th>Center</th>
<th>Building</th>
<th>Room</th>
<th>Serial #</th>
<th>Purchase Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>000000144</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAAN8AB157200</td>
<td>20004723</td>
</tr>
<tr>
<td>000000145</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAAN1AB157292</td>
<td>20004723</td>
</tr>
<tr>
<td>000000146</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAAN3AB157303</td>
<td>20004723</td>
</tr>
<tr>
<td>000000147</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAAN5AB157394</td>
<td>20004723</td>
</tr>
<tr>
<td>000000148</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAAN7AB157295</td>
<td>20004723</td>
</tr>
<tr>
<td>000000149</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAAN9AB157396</td>
<td>20004723</td>
</tr>
<tr>
<td>000000150</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN0AB157297</td>
<td>20004723</td>
</tr>
<tr>
<td>000000151</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN2AB157298</td>
<td>20004723</td>
</tr>
<tr>
<td>000000152</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN4AB157299</td>
<td>20004723</td>
</tr>
<tr>
<td>000000153</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN6AB157300</td>
<td>20004723</td>
</tr>
<tr>
<td>000000154</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN8AB157301</td>
<td>20004723</td>
</tr>
<tr>
<td>000000155</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN9AB157302</td>
<td>20004723</td>
</tr>
<tr>
<td>000000156</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN0AB157303</td>
<td>20004723</td>
</tr>
<tr>
<td>000000157</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN2AB157304</td>
<td>20004723</td>
</tr>
<tr>
<td>000000158</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN4AB157305</td>
<td>20004723</td>
</tr>
<tr>
<td>000000159</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN6AB157306</td>
<td>20004723</td>
</tr>
<tr>
<td>000000160</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN8AB157307</td>
<td>20004723</td>
</tr>
<tr>
<td>000000161</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN9AB157308</td>
<td>20004723</td>
</tr>
<tr>
<td>000000162</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN0AB157309</td>
<td>20004723</td>
</tr>
<tr>
<td>000000163</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN2AB157310</td>
<td>20004723</td>
</tr>
<tr>
<td>000000164</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN4AB157311</td>
<td>20004723</td>
</tr>
<tr>
<td>000000165</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN6AB157312</td>
<td>20004723</td>
</tr>
<tr>
<td>000000166</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN8AB157313</td>
<td>20004723</td>
</tr>
<tr>
<td>000000167</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN9AB157314</td>
<td>20004723</td>
</tr>
<tr>
<td>000000168</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN0AB157315</td>
<td>20004723</td>
</tr>
<tr>
<td>000000169</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN2AB157316</td>
<td>20004723</td>
</tr>
<tr>
<td>000000170</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN4AB157317</td>
<td>20004723</td>
</tr>
<tr>
<td>000000171</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN6AB157318</td>
<td>20004723</td>
</tr>
<tr>
<td>000000172</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN8AB157319</td>
<td>20004723</td>
</tr>
<tr>
<td>000000173</td>
<td>BUS. KCC TYPE C.W</td>
<td>7900</td>
<td>9240</td>
<td>01</td>
<td>0001</td>
<td>4DRBUAN9AB157320</td>
<td>20004723</td>
</tr>
</tbody>
</table>
Update Building/Room Numbers
Click on **Asset Management** and then click on **Update Asset Building/Room**.
Your center number is automatically populated in the Center field. This panel is sorted by the Building and Room number fields and then by Asset Number within the building/room number.

You can narrow the list by entering search criteria at the top of the panel. Only the first character is needed to search by Serial Number. Nine characters are needed to search by Asset. When searching by asset number, add zeros to the beginning if your tag # is not nine characters long. After the search criteria are entered, press the Enter key on your keyboard.

To view all assets in the list press the Page Down key on your keyboard until the Information Line says, ‘No additional records.’ Use the Page Up and Page Down keys on your keyboard or the green arrows on the panel to scroll through the asset listing.

To update a building number, room number, and/or blank serial number:
Select Change from the dropdown box in the Action field.
Select the correct building and/or room number from the respective dropdown boxes.
If the correct one does not appear, contact the person at your site who manages your facilities information and request that it be added to the A146 panel.
Enter the correct serial number in the blank Serial Number field. Contact Property Control staff to correct an error is an existing serial number.
Press the Enter key or click Save.
Multiple changes can be made, but you must save your changes before you page down to the next page.
On-line Transfers: Sending Site Property Designee
Under the All Options menu click on Asset Transfers and then click on Search for Asset Tags. If you know the asset number that you want to transfer, you can skip the Search menu and go straight to the Initiate Asset Transfer option. (Skip to page 21)
The user’s cost center automatically fills in the Center field when this panel is accessed. Use **Page Up** or **Page Down** on your keyboard to find the asset you want to transfer. You have not run through the entire list until the Information Line says, ‘No additional records.’ Use the search criteria at the top of the panel to narrow the list. To select an asset for transfer, highlight a record and **double-click** it or press **F11**.

All of your site’s assets will be included in this list including active, stolen, missing, and retired, but only active assets may be transferred. To list active assets only, insert a ‘10’ in the **Disposition** field.

**HELPFUL HINT:** Nine characters are needed to search by Asset. When searching by asset number, add zeros to the beginning if your tag # is not nine characters long.
The following fields require an entry:

1. **Transfer Reason**
   There are three different transfer reasons to choose from:
   - SN – this is a site to site transfer with no Warehouse staff involvement
   - SU – this is a transfer to the Surplus Warehouse
   - TR – this is a site to site transfer with the Warehouse staff moving the asset

2. **Receiving Location:** Center
   Enter the receiving site’s center number or choose it from the dropdown box

3. **Sending Designee & Date**
   Enter your first and last name and today’s date

When all required data has been entered click **Save**.

If you need to add special instructions for the warehouse staff, such as staging area location, you can select the **Notes** button and add your detailed information there. However, you must save the transfer before adding a note.

After the sending site designee initiates a transfer, the sending site’s property custodian (Principal/Department Director or above) will be sent an automatic email notification that the transfer needs to be approved.
If you have initiated a transfer in error, you can delete it as long as the sending site’s property custodian (Principal/Department Director or above) has not approved the transfer yet in CrossPointe. If the sending site’s property custodian (Principal/Department Director or above) has already approved the transfer then they will have to delete it using the Sending Site Approvals panel (refer to page 26).

To delete a transfer record that has not been approved click the **Delete** button. It is important to read the Information Line because the screen does not change after you delete a transfer record; however, the Information Line does read “Record deleted. Press ENTER to add.” **Do not hit Enter.** Doing so will cause the deleted transfer to be added back.
On-Line Transfers:
Sending Safe Property Custodian
Under the All Options menu click on **Asset Transfers** and then **Sending Site Approvals** to approve outgoing pending transfers.
This panel is not accessible for use except by the Property Custodian (Principal/Department Head or above).

To view all assets in the list press the **Page Down** key on your keyboard until the Information Line says, ‘No additional records.’ Use the **Page Up** and **Page Down** keys on your keyboard or the green arrows on the panel to scroll through the asset listing.

For transfers that have not been approved there will be a ‘P’ in the Approval field.

To view details of a transfer click on the **magnifying glass** icon beside the transfer record. Additionally the notes, if any, can also be accessed from this panel by clicking the **notepad** icon.

Under the action column select **Change** from the dropdown box, type an ‘A’ in the Approval field and press the **Enter** key or the **Save** button to approve outgoing transfers. Multiple actions can be made, but you must save your changes before you page down to the next page.

**This completes the transfer on the sending side.**

After a transfer has been approved, the receiving site’s designee will be sent an automatic email notification that the transfer requires action of the designee to acknowledge receipt once the asset is physically received at that site. **It is important to note that if changes are made to a transfer record that has already been approved new emails will be sent to the receiving site’s designee.**
To delete a transfer that has already been approved by the property custodian (Principal/Department Director or above), then the property custodian (Principal/Department Director or above) must delete it using this panel. To do so:

- Select the transfer record you wish to delete.
- Select **Delete** from the dropdown box.
- Click the **Save** button.
On-Line Transfers: Receiving Site Property Designee
Under the All Options menu select Asset Transfers and then View Pending Asset Transfer List to view all incoming transfers.
Your center number will automatically populate the To Center field. To view all pending transfers:

Press the **Enter** key or the **Select** button.

Press the **Page Down** key until the Information Line says, ‘No Additional Records.’

Use the **Page Up** and **Page Down** keys on your keyboard or the green arrows on the screen to scroll through all of the pending transfers.

Highlight the record you want to view and double-click it or press **F11**.

By clicking **Export**, you can export this list into an Excel format. To assure all data has been loaded into Excel, you **must** wait for the Excel Interface box to appear. It will say ‘Excel Interface Finished Successfully.’ Page 37 shows an example of data exported to Excel.

Transfers with a **Status** of ‘P’ have not been approved by the sending site’s property custodian (Principal/Department Director or above) yet. If your site has received a transfer with a ‘P’ status, please contact the sending site and request that their property custodian (Principal/Department Director or above) complete their approval. You will not be able to complete all of the receiving site designee actions until this approval is made.
The following fields require an entry:

1. **Transfer Date**
   
Enter the date your site received the asset

2. **Building Number**
   
Enter the asset’s building # or choose it from the dropdown box

3. **Room Number**
   
Enter the asset’s room # or choose it from the dropdown box

4. **Condition**
   
Enter the asset’s condition when it was received

5. **Receiving Designee & Date**
   
Enter your first and last name and today’s date

Additional information can be added in the Assigned To box. This data will only appear in the Asset Transfer History Query (refer to pages 42-44).

When all required data has been entered click **Save**.

After the action of the receiving site designee, the receiving site’s property custodian (Principal/Department Director or above) will be sent an automatic email notification that the transfer needs to be approved. **It is important to note that if changes are made to a transfer record that has already been received on, a new email will be sent to the receiving site’s property custodian (Principal/Department Director or above).**
On-Line Transfers: Receiving Site Property Custodian
Under the All Options menu select **Asset Transfers** and then **Receiving Site Approvals** to view incoming transfers ready for receiving.
This panel is not accessible for use except by the Property Custodian (Principal/Department Head or above).

The receiving site’s property custodian (Principal/Department Director or above) can approve a pending transfer once the record has had the appropriate information added and is saved by the designee. The property custodian (Principal/Department Director or above) can also receive on multiple records at one time. Multiple actions can be made, but you must save your changes before you page down to the next page.

To view the entire list use **Page Up** or **Page Down** on your keyboard until the Information Line says, ‘No additional records.’ To see the transfer initiation screen, click the magnifying glass icon beside the transfer record. Additionally the notes, if any, can also be accessed from this panel by clicking the notepad icon.

To approve a transfer:

- Place a ‘Y’ in the Post field.
- Click the **Post** button. The Information Line will ask the user to click the Post button (F6) one more time for verification.
- Click **Post** again and only those records that have a ‘Y’ in the Post field will be permanently moved to your inventory.

**This completes the transfer on the receiving side.** For further assurance that the transfer has been moved to your site’s inventory refer to pages 38-41.

**REMINDER:** The **Post** button must be pressed twice for the asset to move to your inventory.
View Pending Asset Transfers
At any time you can view all pending transfers to or from your site. Under the All Options menu click on Asset Transfers and then click on View Pending Asset Transfer List.
Your center number will automatically populate the To Center field. This will allow you to view all pending transfers to your site.

If you want to view all pending transfers from your site, remove your site number from the To Center field and enter it in the From Center field.

To view the results:
- Press the **Enter** key or the **Select** button.
- Press the **Page Down** key until the Information Line says, ‘No Additional Records.’
- Use the **Page Up** and **Page Down** keys on your keyboard or the green arrows on the screen to scroll through all of the pending transfers.
- Highlight the record you want to view and **double-click** it or press **F11**.

Transfers with a **Status** of ‘A’ have been approved by the sending site’s property custodian (Principal/Department Director or above). Those with a **Status** of ‘P’ have not. You can search for approved transfers or pending transfers by placing an ‘A’ or ‘P’ in the **Approval** field.

By clicking **Export**, you can export this list into an Excel format. To assure all data has been loaded into Excel, you must wait for the Excel Interface box to appear. It will say ‘Excel Interface Finished Successfully.’ Page 37 shows an example of data exported to Excel.
You can use this report to alert your property custodian (Principal/Department Director or above) that they have pending transfers that need approval.
View Completed Asset Transfers
Under the All Options menu click on Asset Management and then Maintain Asset Definitions to view the transferred asset.
In the Asset box, type in the asset number and press the Enter key or click the Select button. The Location Center on this panel shows that the asset is now on the receiving site’s inventory.

You may also click on the Audit History tab. Refer to the next page for further detail.
The Audit History tab shows where the asset came from and who approved the transfer. Use the Page Down key on your keyboard or the green arrows on the panel to view any additional history.
You can view all transfers made to and from your site by clicking on Asset Transfers and then View Asset Transfer History.
To view all transfers from your site enter your site number in the From Center field. To view all transfers to your site enter your site number in the To Center field.

Press the **Enter** key or the **Select** button.
Press the **Page Down** key until the Information Line ‘No additional records.’
Use the **Page Up** and **Page Down** keys or the green arrows on the panel to scroll through the list.

Please note that only transfers processed through the online process will appear.

By clicking **Export**, you can export this list into an Excel format. To assure all data has been loaded into Excel, you must wait for the Excel Interface box to appear. It will say ‘Excel Interface Finished Successfully.’ Page 44 shows an example of data exported to Excel.
This shows the exported list in Excel; it lists all transfers since the online transfer process began.
Reports
AS400 Sign-on Screen.
To select CrossPointe: Student and Business Systems, enter “2” and press the Enter key.
To access the report menu, type **Z401** in the Panel field and press the **Enter** key.
To view the reports on the School/Department Menu, type **404** in the Panel field and press the **Enter** key.
Enter the report number you wish to view in the Enter Selection field and press the **Enter** key.
Asset Additions Report: this report lists all newly purchased assets added to a site’s inventory within a given time period. It will not list transfers.

Enter your site number.
Enter a ‘from’ month and year.
Enter a ‘to’ month and year.
Press the Enter key to run the report.
Press F3 to exit.
**Missing Assets Report**: this report lists all missing assets on the site’s inventory.

Enter your site number.
Press the **Enter** key to run the report.
Press **F3** to exit.
Print Inventory Worksheet: this report lists the inventory for the site for which it was run.

Enter your site number.
Press the Enter key to run the report.
Press F3 to exit.
Type **PRT** in the Panel field and press the **Enter** key to view the report(s) you ran.
To select the display option, enter “5” and press the **Enter**.
This is a sample “Print Inventory Worksheet” report (report# 3). Use the Page Up and Page Down keys to scroll through the report.

There are three ways to print the report:
1. Using a GUI printer
2. Using a network printer
3. Using a printer session

For assistance in using any of the print options please contact the Brevard Public Schools Help Desk.