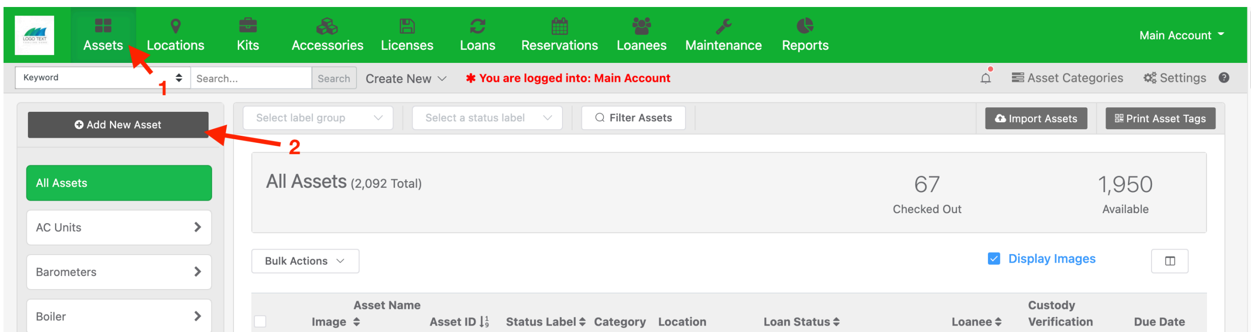
Reftab

Add New Assets:

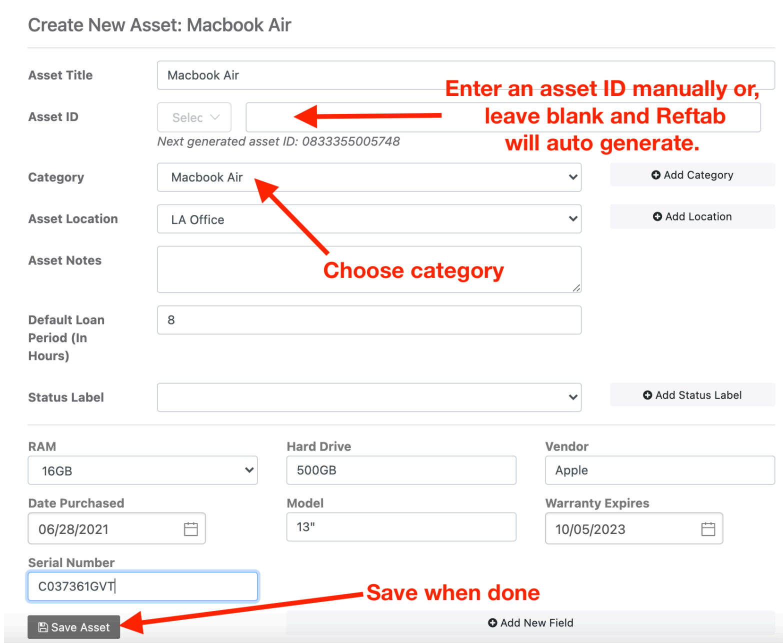
Items that are tracked as single, unique items, (and usually have asset tags attached) are considered assets. You can store as many assets as your quota allows. Archived assets are not counted towards your billable asset quota.

1) Log into your Reftab account: www.reftab.com/login
2) Click “**Assets**” > “**Add New Asset**”

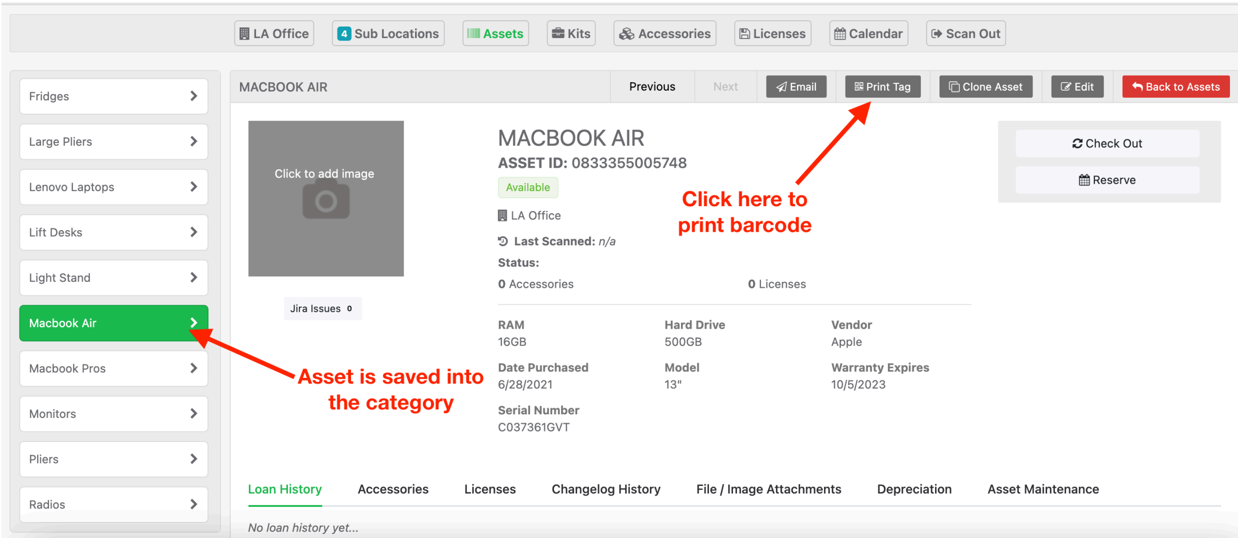


3) You’ll need to select a category that the asset will belong to, then fill out the details of the asset.

3a) You can provide an asset ID manually or, leave blank and Reftab will automatically generate the next asset ID for you.



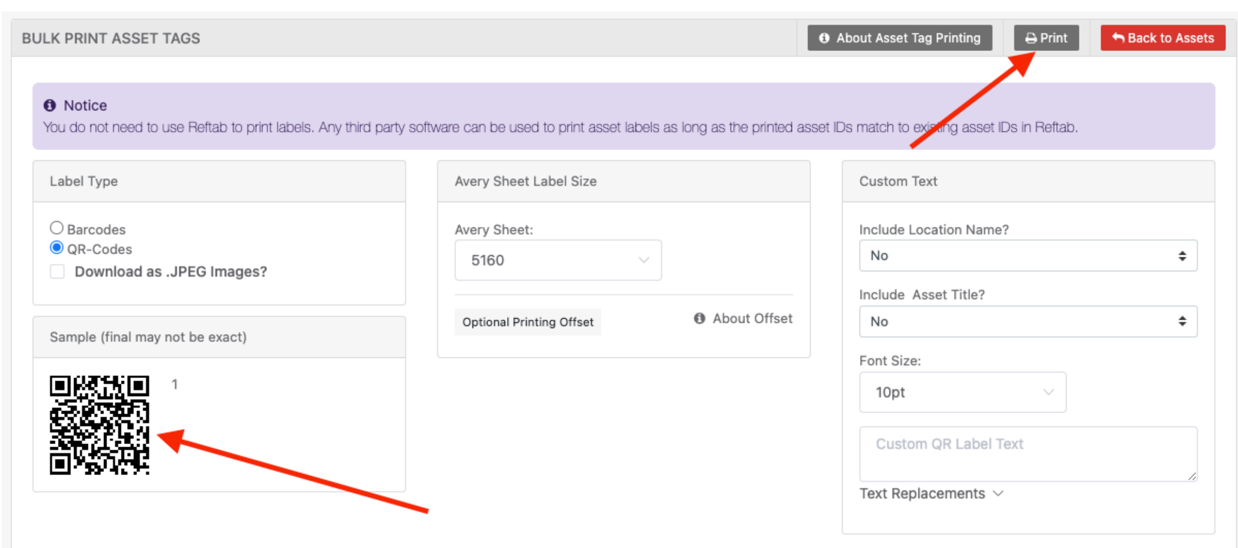
4) Click “**Save Asset**” when done.
Once asset is saved, you will be brought to the asset screen where you can print the barcode, check the asset out to a user, email the asset and so on…



Printing Barcodes and QR-Codes

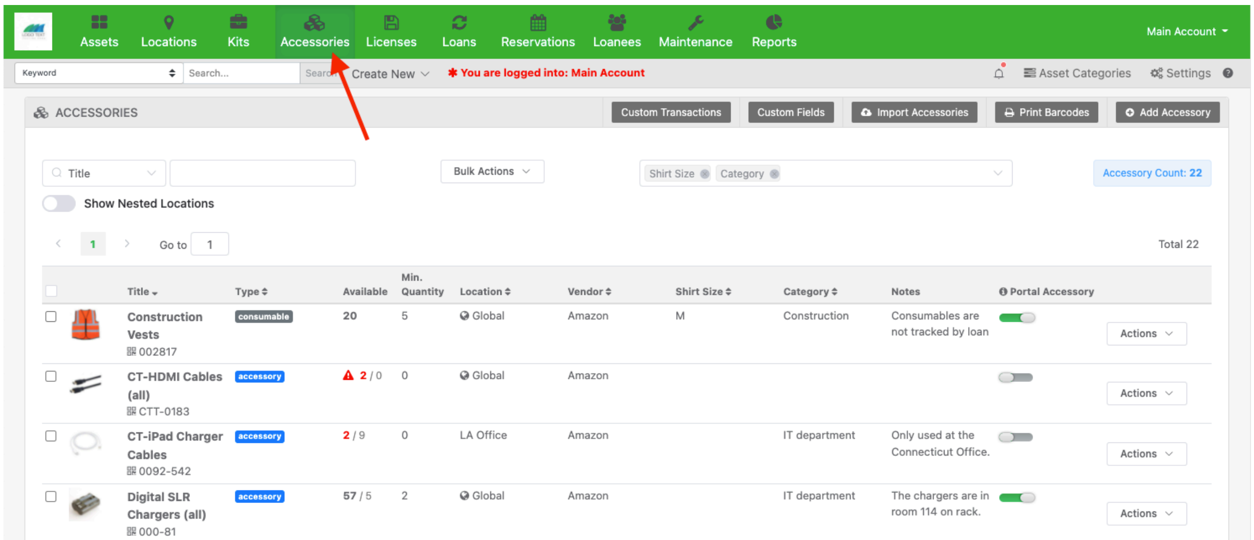
Reftab can generate barcodes and QR-codes for each asset. When viewing your assets you can click “Print Barcodes”. You can select from a group of assets to print and click “**Print**”.

By default Reftab generates a .PDF sized to fit Avery templates. However, you can use third parties to order barcodes and QR-codes. As long as the code you are scanning matches to an asset in your Reftab account, the Reftab mobile app will be able to find the asset. If not, the app will error saying “*Barcode not found, would you like to create a new asset?*”. Tap “*Yes*”, and the asset ID will be pre-filled in on the ‘New Asset’ screen.



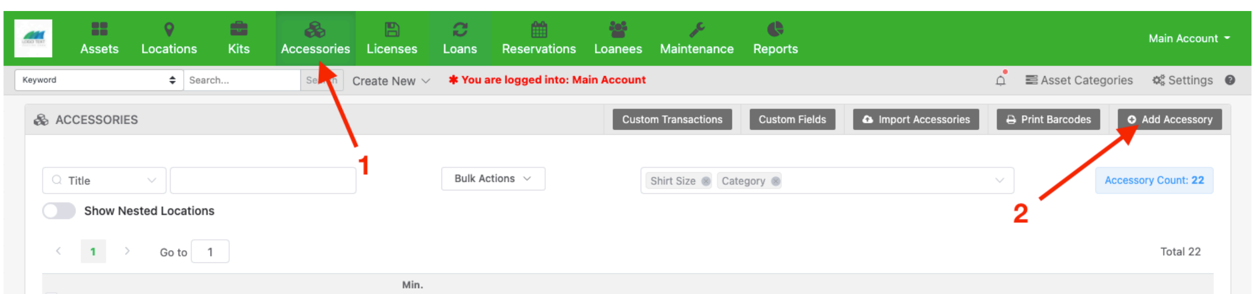
Accessories

Accessories are designed for tracking bulk items. For example, keyboards, cables, laptop chargers, batteries, etc.. These items can have a barcode, but the barcode should be placed on the box or the shelf that holds the accessories. When you add a new accessory into Reftab, you set a current quantity and as you check the items in and out, the current quantity will update accordingly.



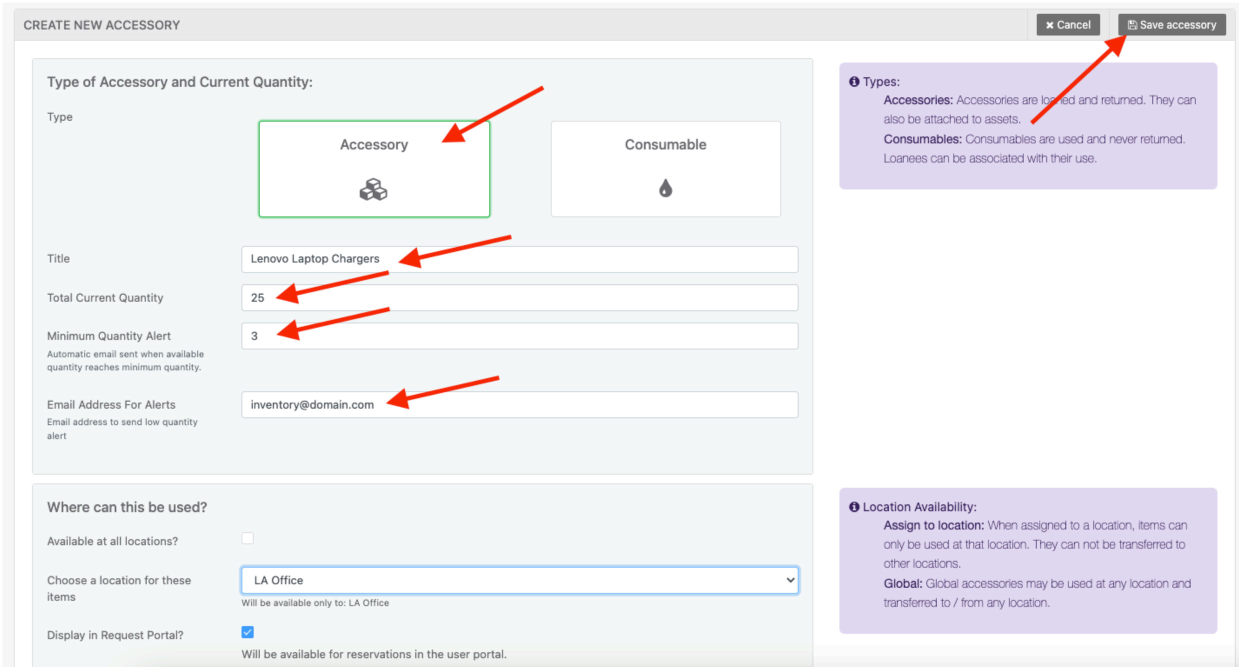
Creating New Accessories

Click “**Accessories**” > “**Add New Accessory**”



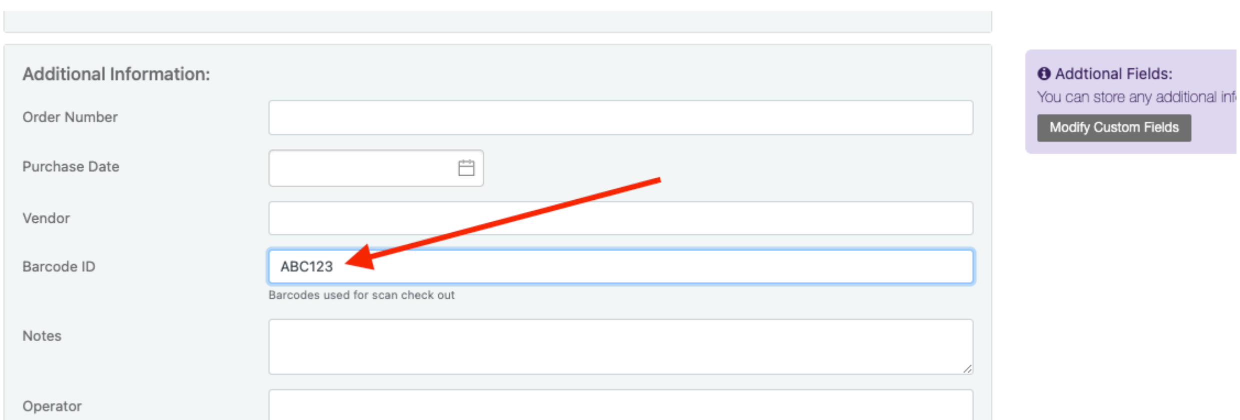
Give the accessory a name and how many you currently have. You can also set a minimum quantity amount when you’d like to be alerted. For example, if you tell Reftab you have 25 laptop chargers, you can set a minimum quantity alert of 3 and provide an email address. When available laptop chargers get at or below 3, Reftab will send an email to the email address you provide to let you know you’ve run low.

You can continue to select the location these accessories will be available at or select “Available at all locations”. This simply means that the accessories will either be linked to a specific location or available at all locations.



Setting a specific location is suggested when you want to separate inventory items by location so that you can reliably know how many you have at each location.

If you set a “**Barcode ID**”, the Reftab app will be able to scan a barcode so that you can

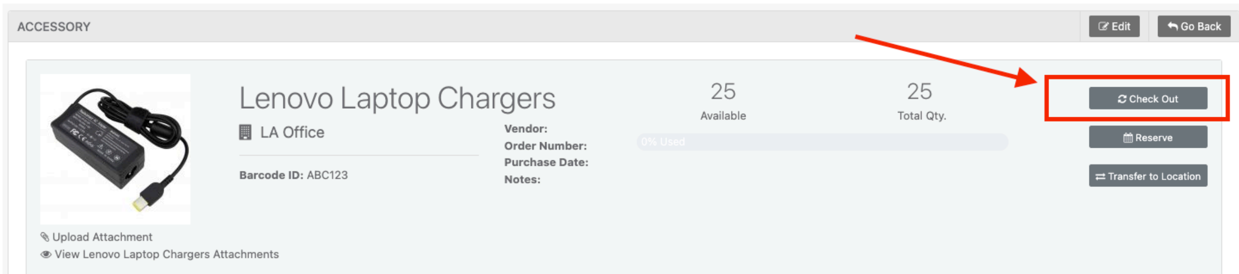


check the accessory in and out on the mobile app.

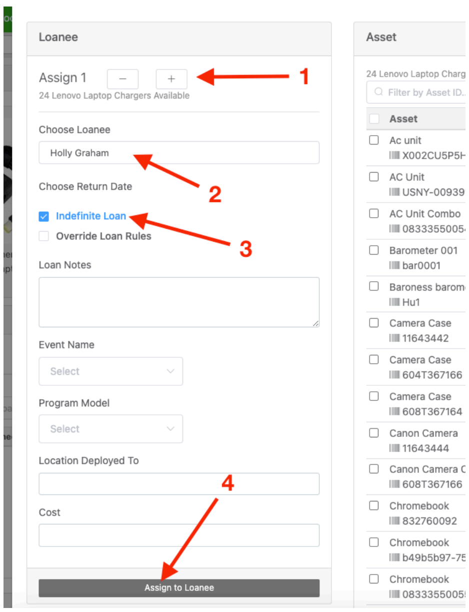
Click “**Save Accessory**” when done.

Checking Accessories in and out

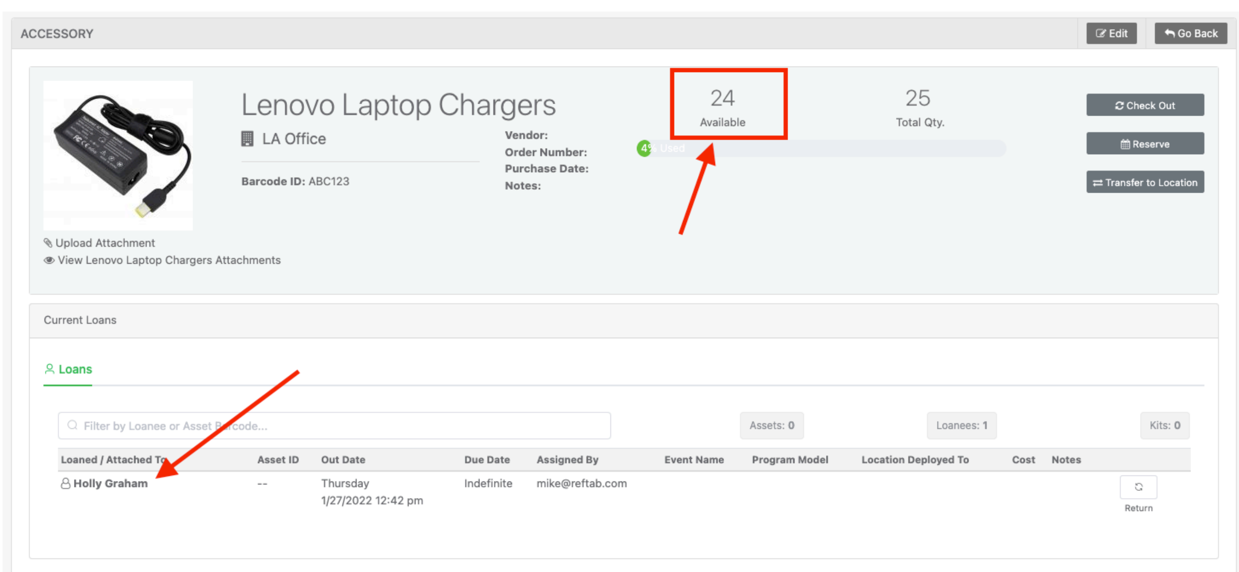
Now that you have an accessory saved, you can check them in and out to users. Click on your accessory and click “**Check Out**”



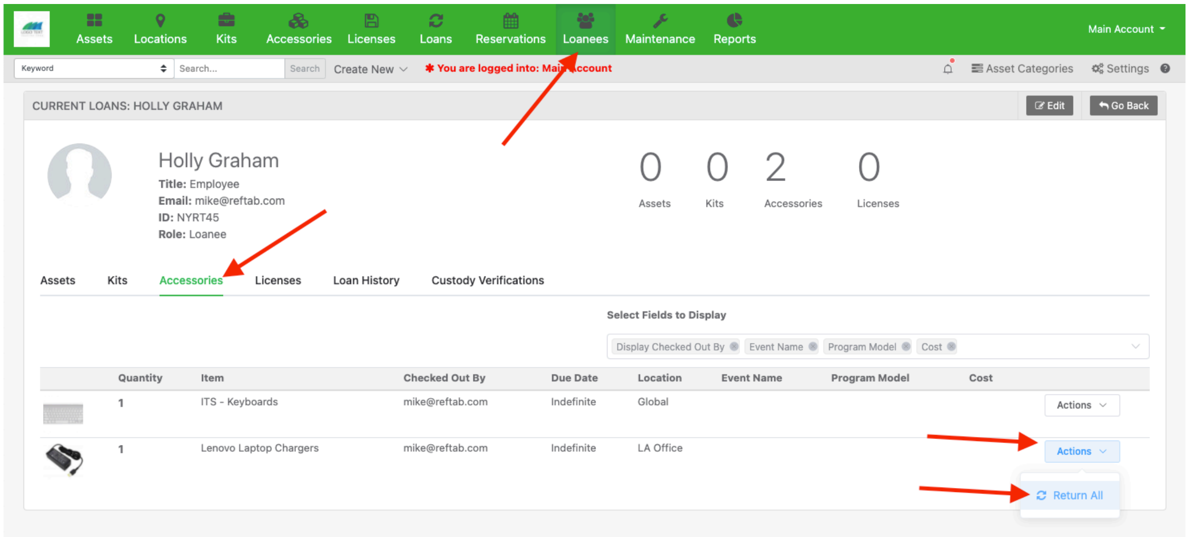
Find a user, select a return date (or select indefinite loan) and click “**Assign to User**”.



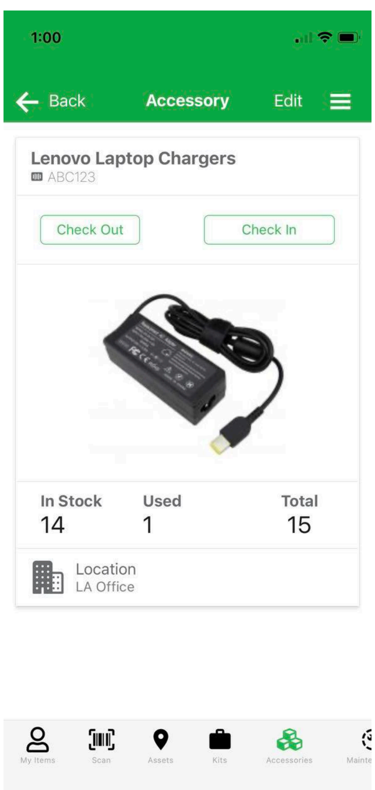
You will see your available count decrease and the loans table will show who has custody over the accessories.

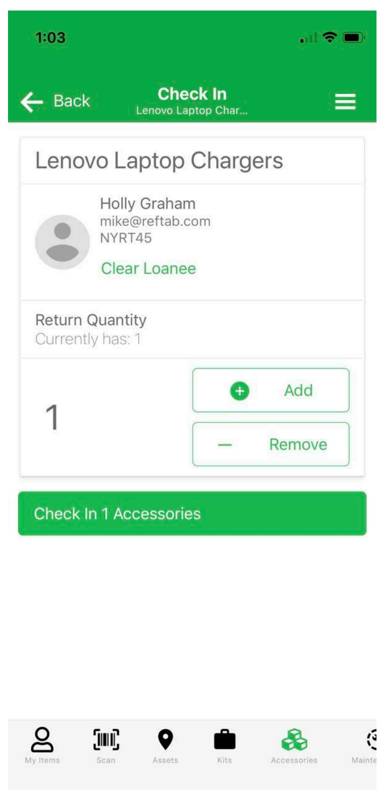


When you're returning an accessory from a user, there's multiple places to do this within Reftab. One of the easiest places is by clicking "**Loanees**", searching for the user and clicking the "**Accessories**" tab and clicking "**Actions**" > "**Return All**"



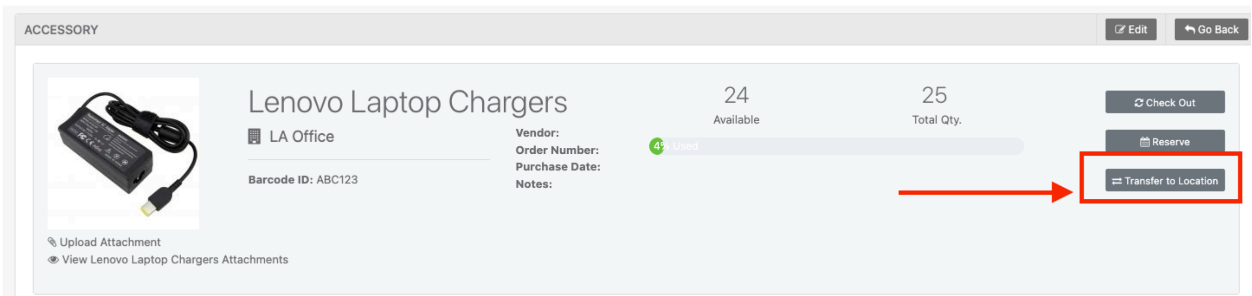
You can also find the accessory in the mobile app and tap, "**Check In**". You will be prompted to select the user who is returning the accessory and select how many they are returning (note that you can scan the accessory barcode, to pull it up quickly on screen).





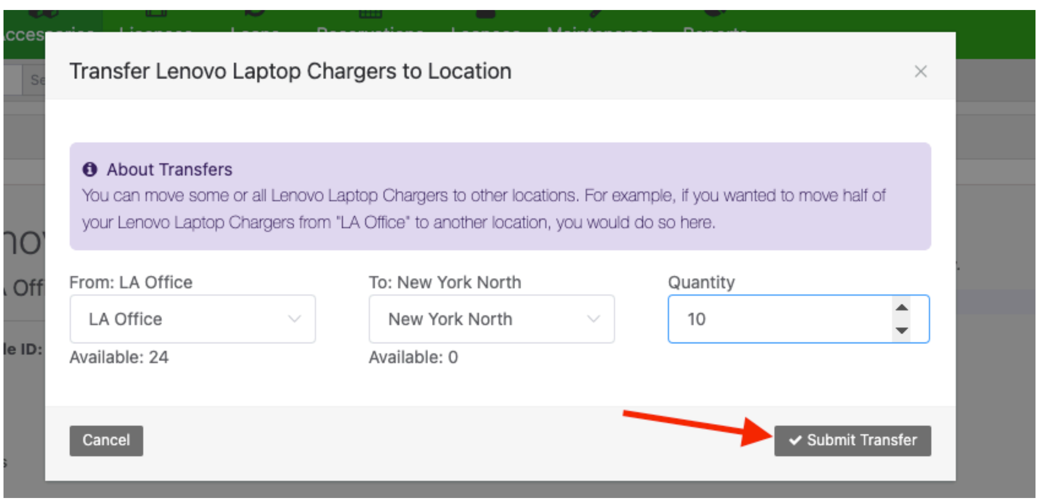
Transferring Accessories Between Locations

If you are sending items from one location to another, you should log this at the accessory level within Reftab. Click into your accessory and click, "**Transfer to Location**".

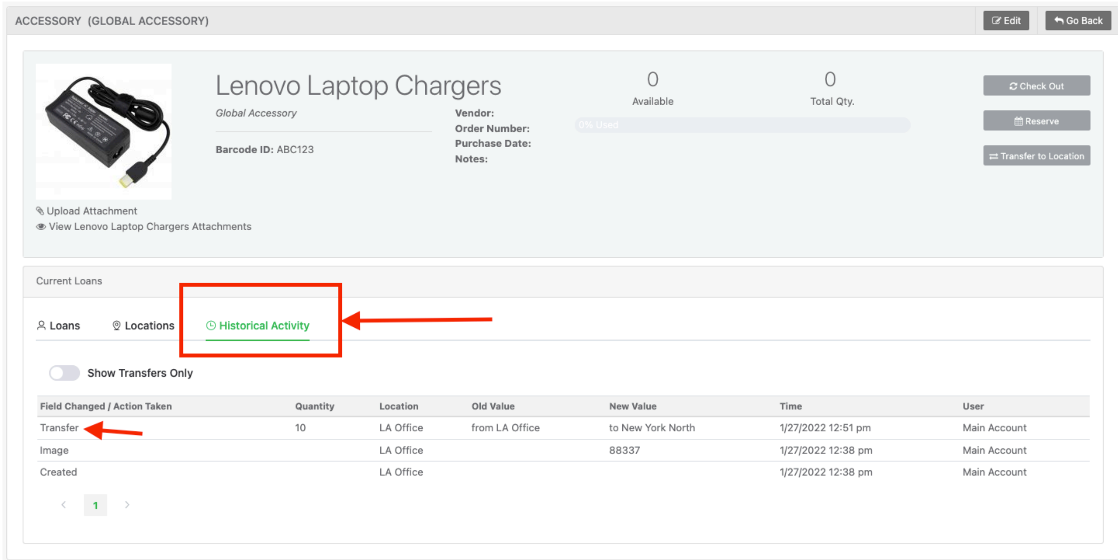


By doing so, you are able to see where things are, how many are there and when they were sent. This ensures that you don't over spend by purchasing new equipment when you may have some available at other locations.

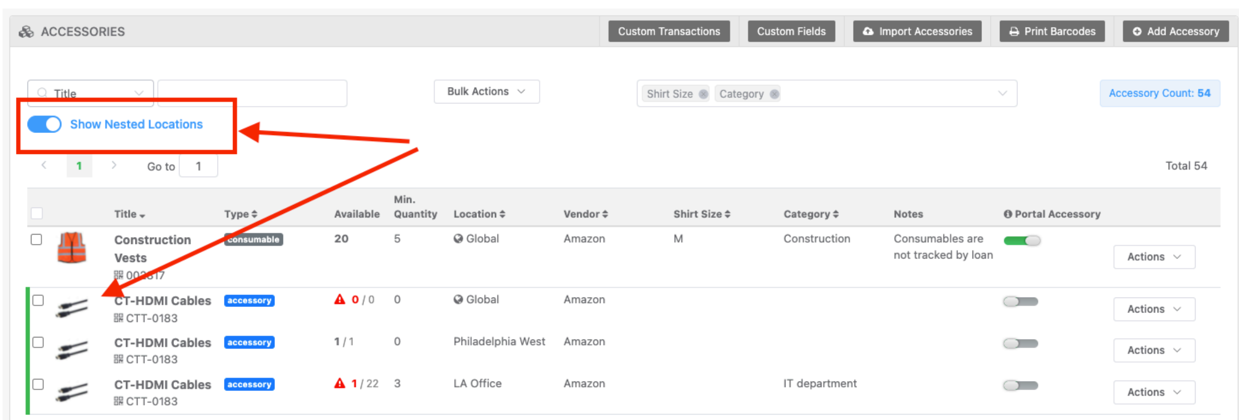
On the window that appears, select the location you're moving the accessory to and input how many you're transferring and click "**Submit Transfer**"



When you next click into your accessory, you'll have a tab, "**Historical Activity**" which will show you when, by whom and what was done on the accessory.



When viewing the accessories, click “**Show Nested Accessories**” and Reftab will expand to show accessories broken out by location:

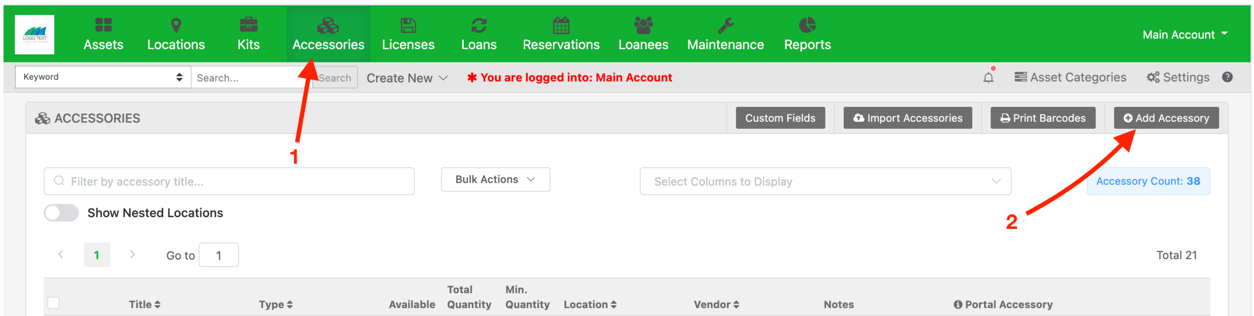


(Show nested option is available on mobile app too)

Consumables

Consumables are items that are used and never returned to stock. Use consumables when all you need to do is track current quantities and view historical transactions.

1) Log into your Reftab account: www.reftab.com/login
2) Click "**Accessories**" > "**Add Accessory**"

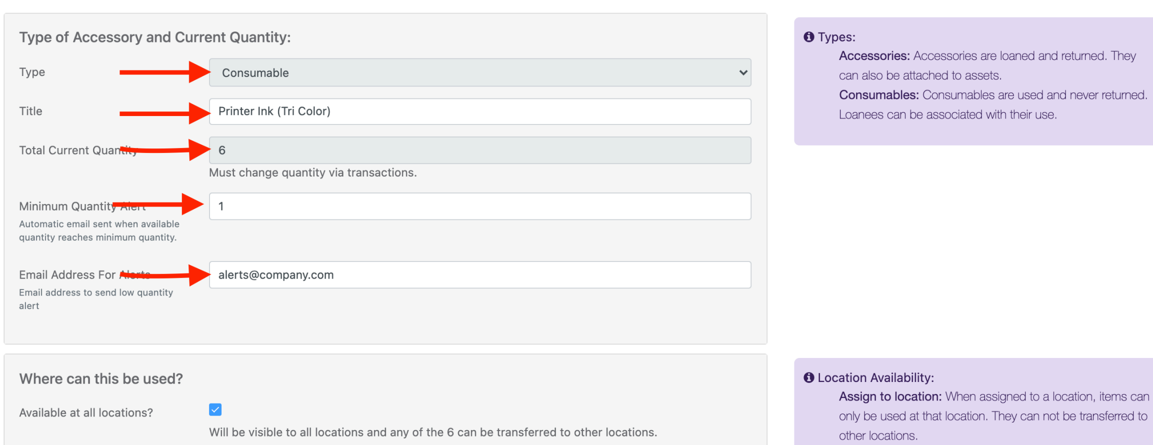


3) Select, "**Consumable**"

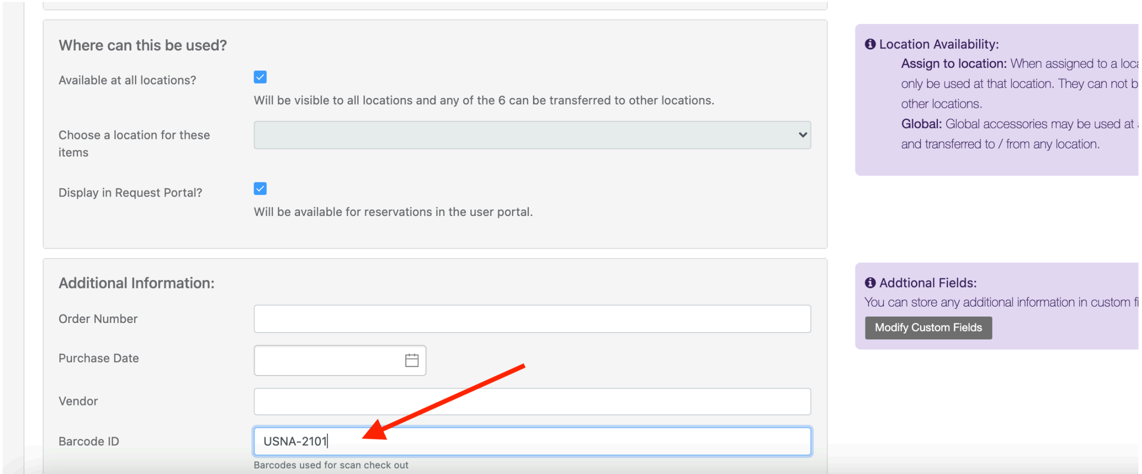
3a) Then, give the consumable a **title**.

3b) Set a **current quantity** (this is the amount you have in stock at time of creating this consumable).

3b) Set a **minimum quantity** amount (when your current quantity gets to this number, Reftab will send an email alert).
3c) Provide an **email address** for the low quantity alerts.

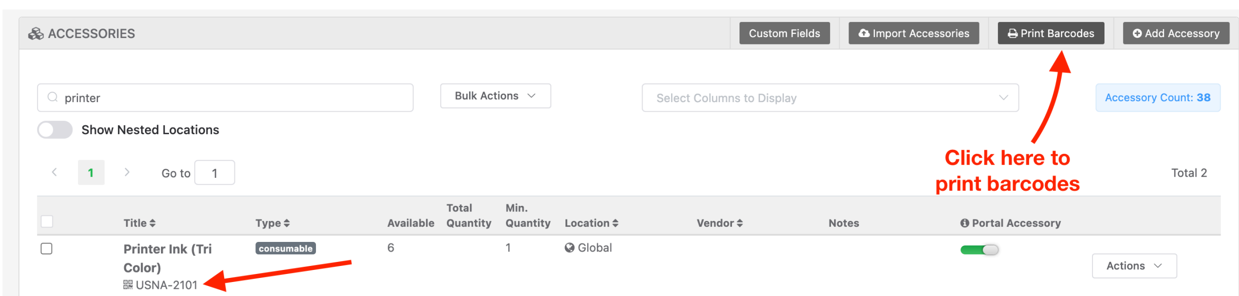


3d) Provide a **barcode**.



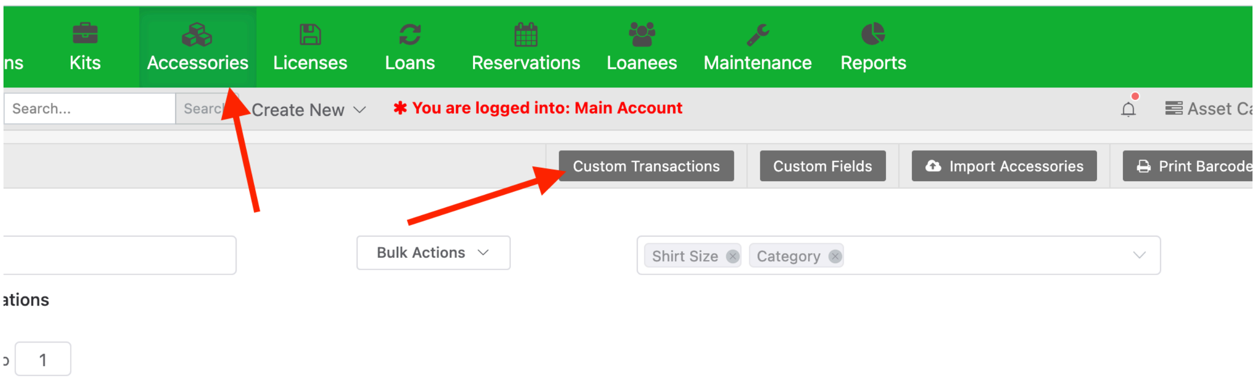
4) Click "**Save Consumable**" when done:

After Saved, you can click the "**Print Barcodes**" button to print the barcode of the consumable. You can then scan the barcode using the Reftab mobile app.

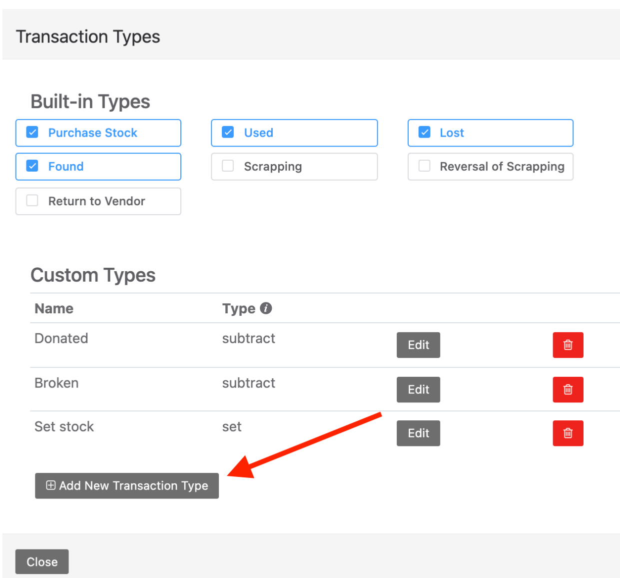


Custom Consumable Transactions

You can add your own transactions to consumables. Click “**Accessories**” > “**Custom Transactions**”



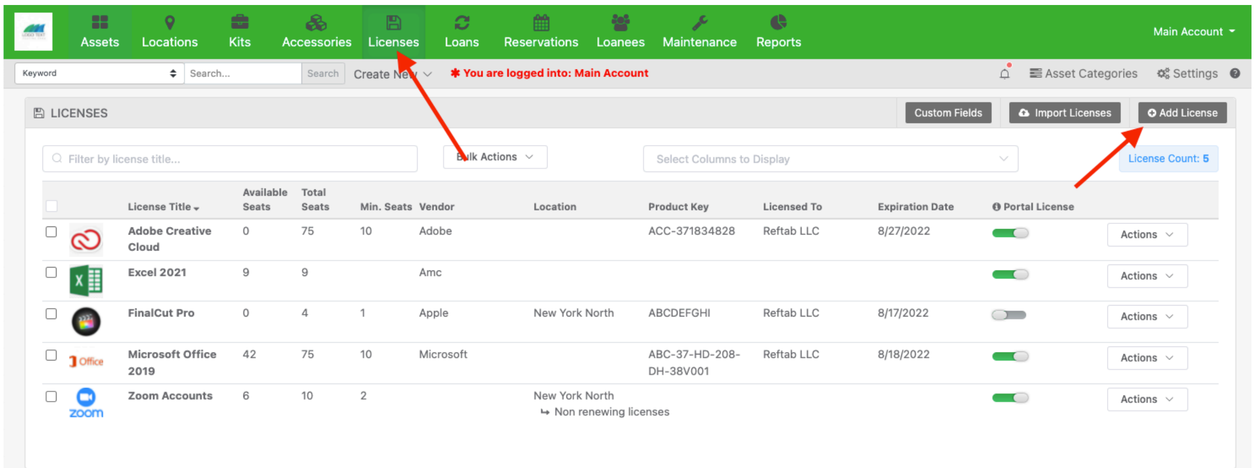
Click “**Add New Transaction Type**” and you’ll be able to provide a name and set a transaction type: “**Add**”, “**Subtract**”, “**Set (sets to provided quantity)**”



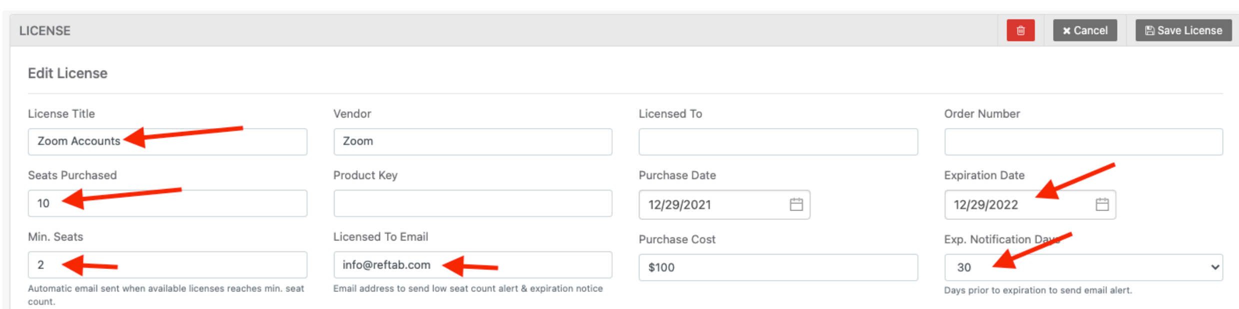
•<u>**Add**</u> - When performing an “add” you are adding to your current quantity.
•<u>**Subtract**</u> - When performing a “subtract” you are taking away from your current quantity.
•<u>**Set**</u> - When performing a “set” you are resetting your current quantity.

Licenses

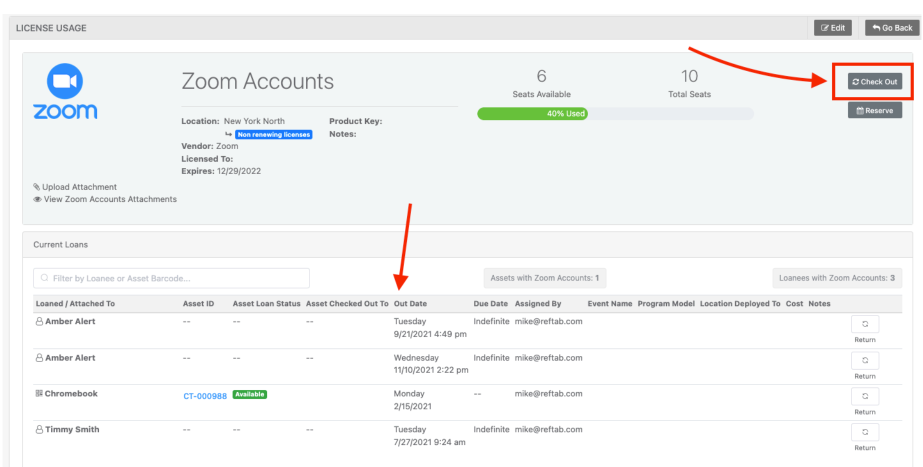
When you need to track the licenses your organization purchases, renewal / expiration dates and seat usage, you can do so within the Licenses page.



To create a new license, click "**Add License**". You will set the license name and optionally, provide the number of seats purchased, minimum seat count, licensed to email, expiration date and exp. notification days. Click "**Save License**" when done.

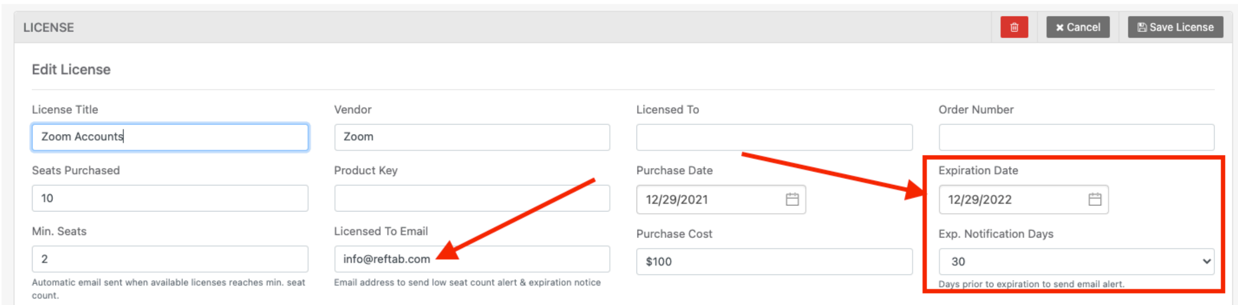


Click the "**Check Out**" button to assign a license seat to a user or attach to an asset. As you do, the number of available seats will reflect how many are unassigned. You can view the Loan Table to see how licenses are being used:



Expiring License Alerts

Note that when editing a license, there are fields for “**Expiration Date**” and a field for “**Ex. Notification Days**”. You can set how many days in advance you’d like to be



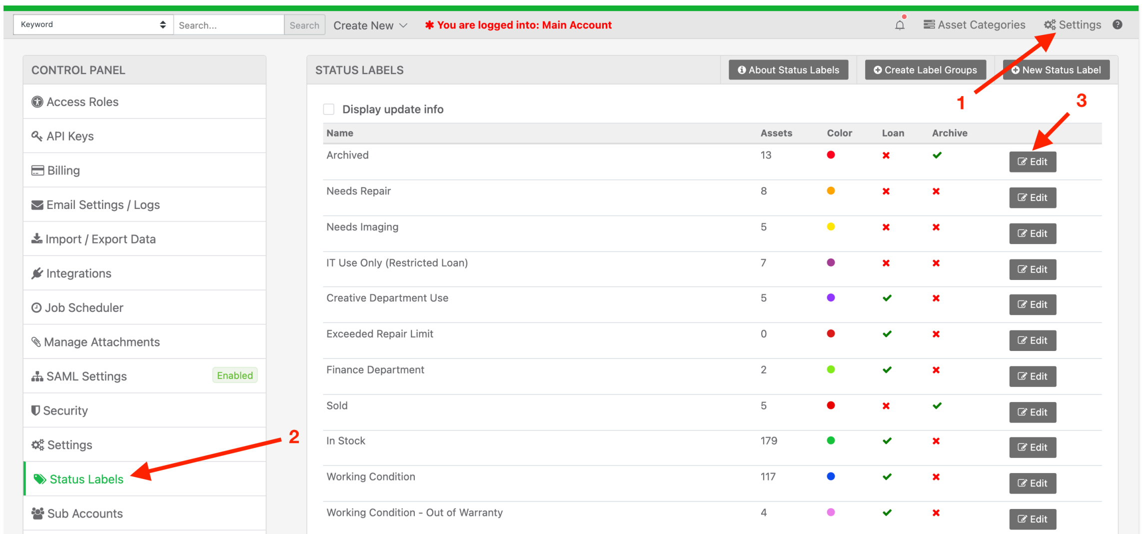
notified before the license expires:

The email address set in the “**Licensed to Email**” will receive the email alerts.

Edit Status Labels:

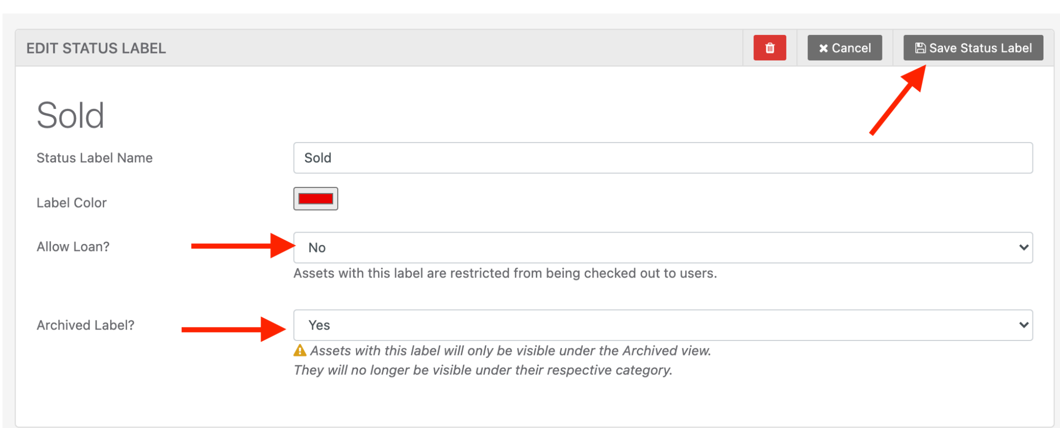
Status labels are applied to assets to indicate their current status. For example, “Needs Repair”, “Working Condition”, “Out of Warranty”.

1) Log into your Reftab account: www.reftab.com/login
2) Click “**Settings**” > “**Status Labels**” and “**edit**” any status label.



<u>Note</u>: There are two status label options that affect assets:

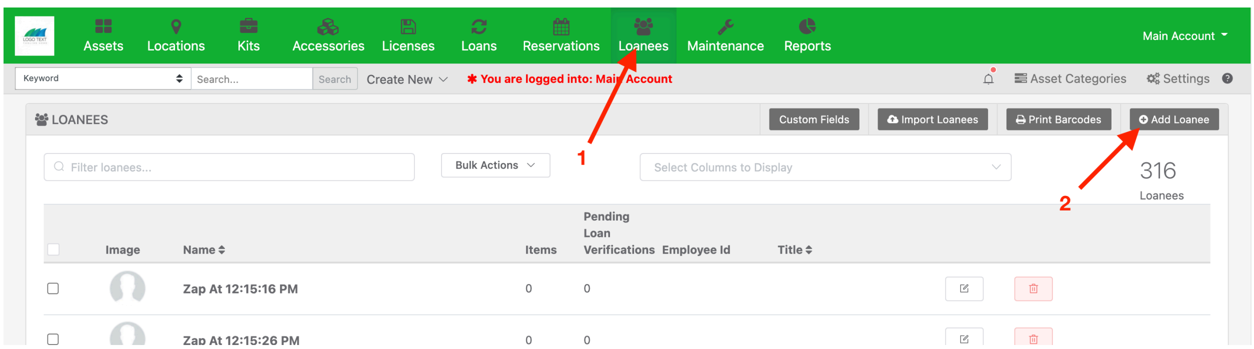
1) **Allow Loan**
    1) If set to “*No*” the asset cannot be loaned / assigned to anyone.
2) **Archived Label**
    1) If set to “*Yes*” the asset will no longer be visible in the asset table of Reftab. It will however, display in reports.



Add / Remove Loanees and Users:

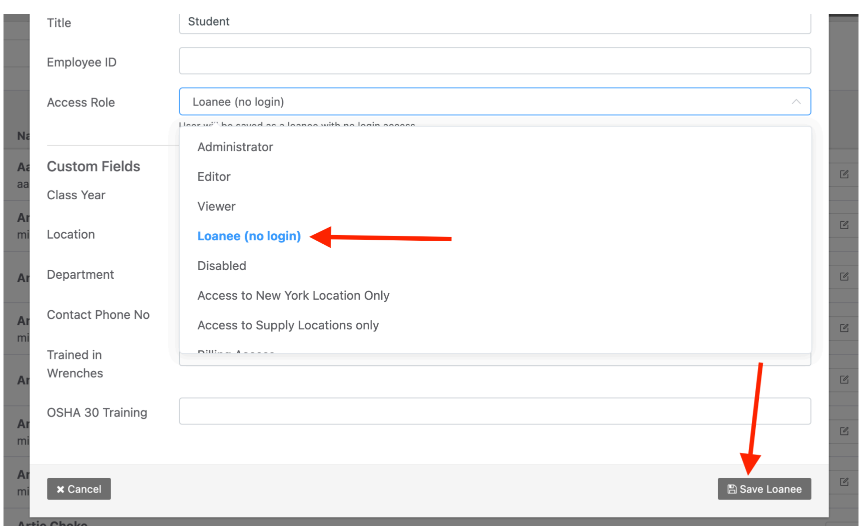
Loanees are borrowers of equipment and have no login rights to Reftab. Users can borrow equipment and login to Reftab to request equipment or administer the system and so on.

1) Log into your Reftab account: www.reftab.com/login
2) Click "**Loanees**" > "**Add Loanee**"



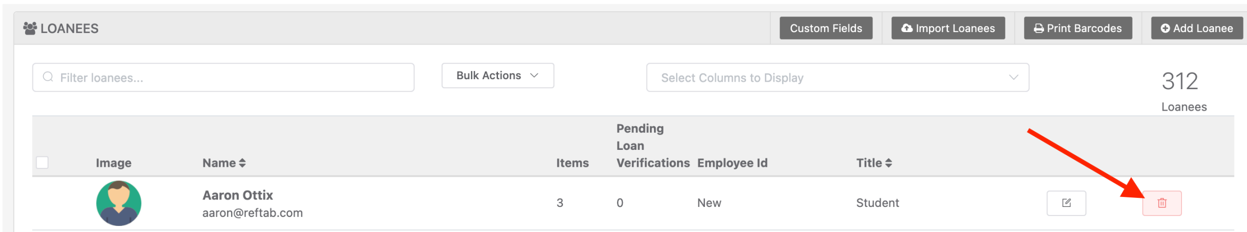
You can add details about the user such as their name, email address and so on..

If you wish to create a loanee (i.e. someone with no login access to Reftab but can still borrow equipment), save them with the access role of "Loanee (no login)". Otherwise, choose another Access Role such as "Administrator" if you're creating an account for someone who needs to log into Reftab and help create assets, manage equipment, create maintenance requests and so on…



Removing Loanees

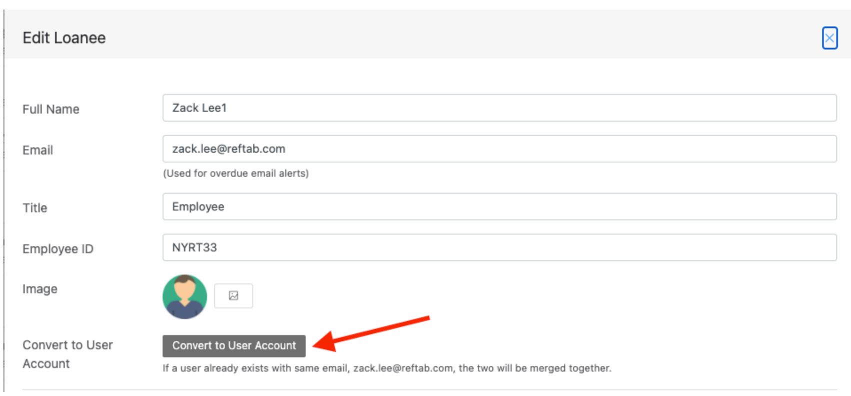
Loanees can be removed from loanees page by clicking red trash can icon.



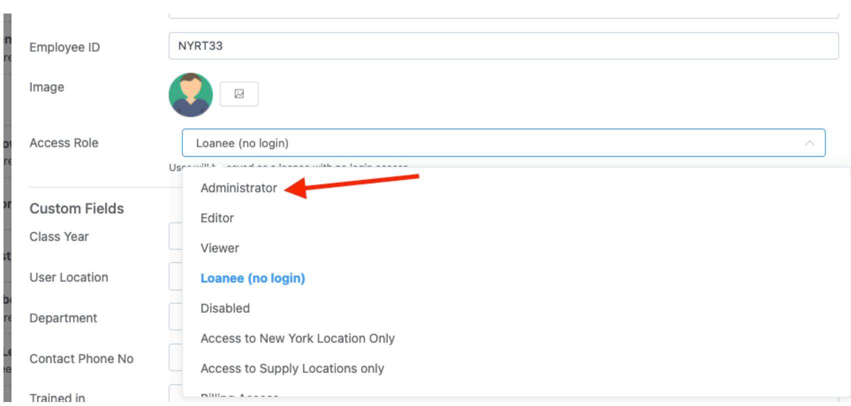
NOTE: Deleting a loanee will remove their name from loan history records. If you need to keep this data for historical purposes, disable the user instead.

Converting Loanees To User Accounts

To convert a loanee to a user, the loanee must have an email address. Start by clicking, "**Edit**" on the loanee and click "**Convert to User Account**"



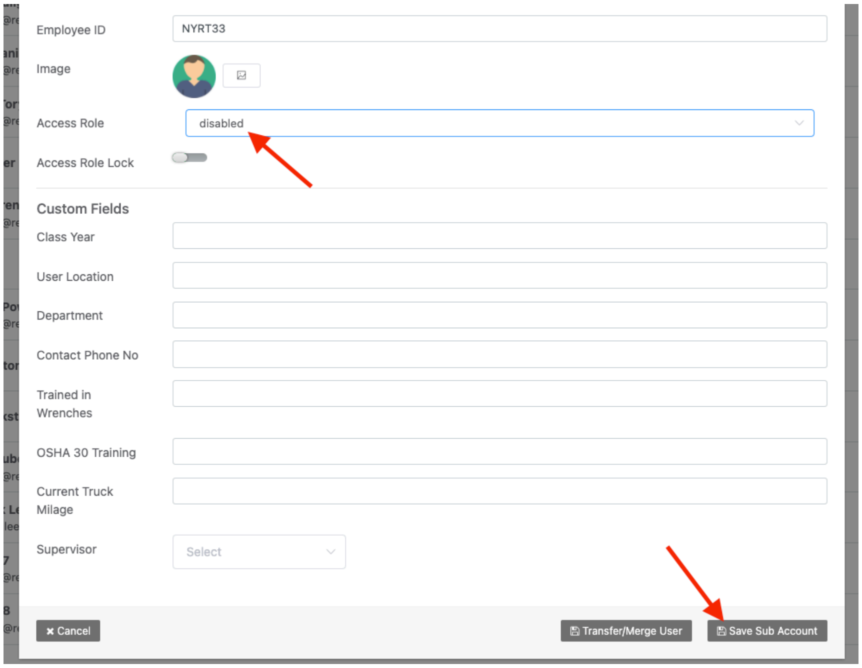
Then, choose the access role for the user and click "**Save Sub Account**" at the bottom.



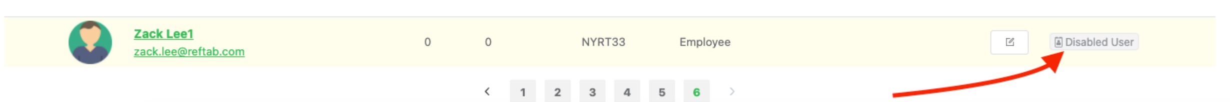
The user will receive an email address to set their password and login.

Disabling User Accounts and Loanees

Disabling a user account means the user will not be able to login and they will longer be visible in the list of loanees when checking out equipment. (If you have a Loanee that you wish to disable, first convert them to a user account) Set their role to "**Disabled**".

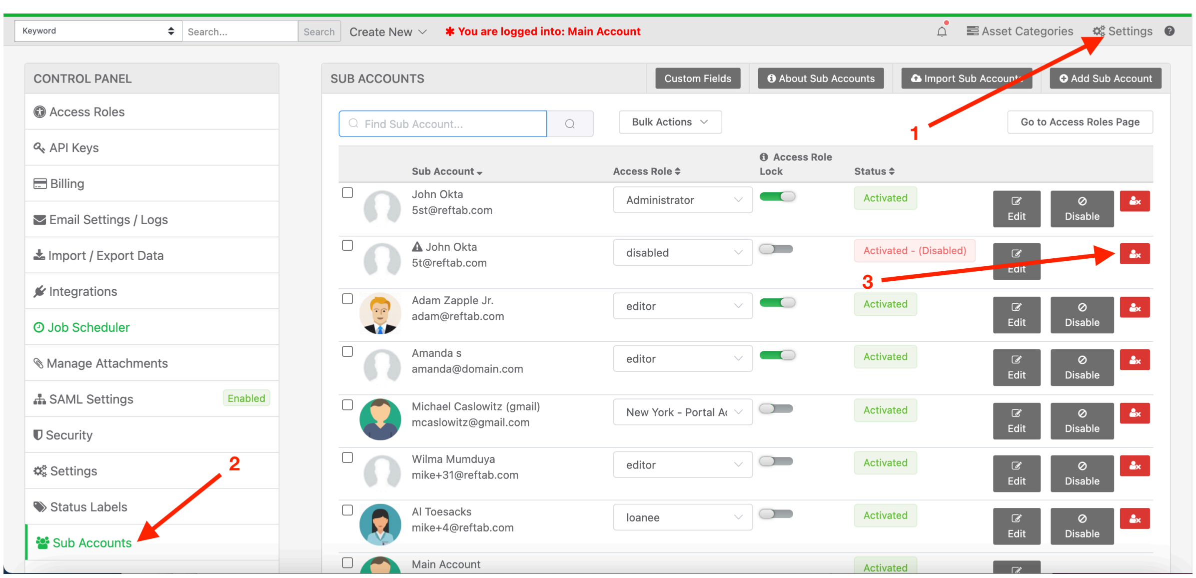


Disabled users will still appear in your list of loanees, they will no longer appear in the drop-down list when checking out items.



Deleting User Accounts

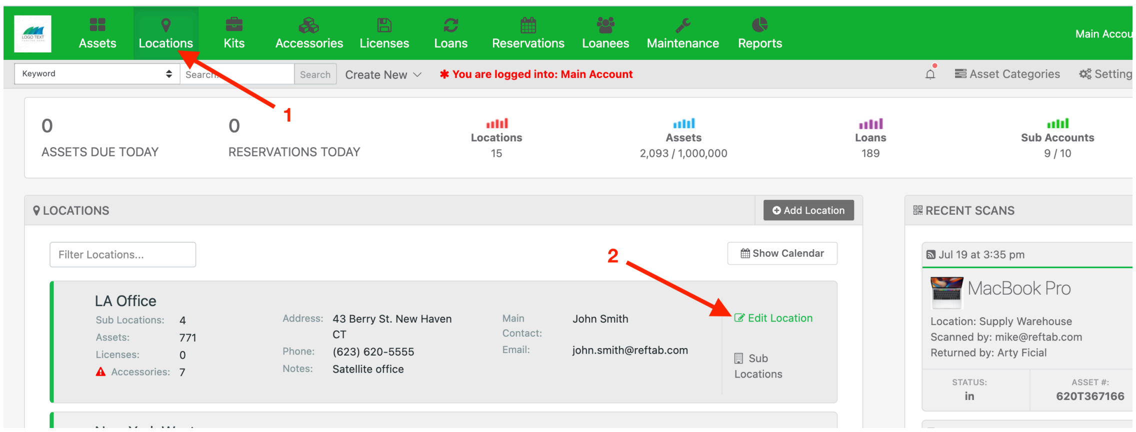
Users need to be removed from the settings page: “**Settings**” > “**Sub Accounts**”. This can only be done by administrators.



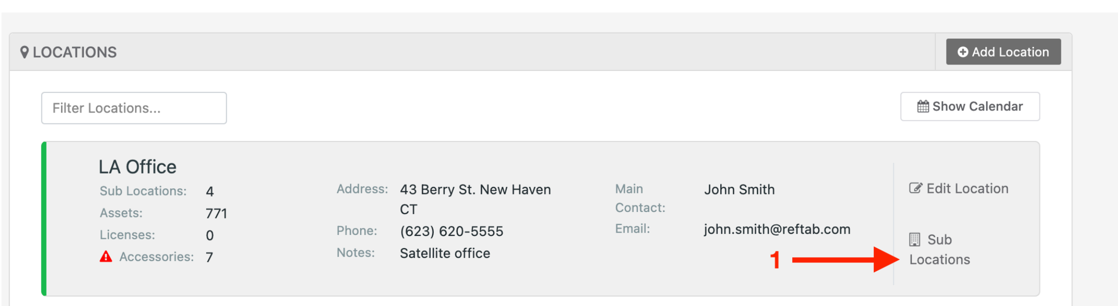
Edit Locations and Sub Locations:

Locations group assets by where they physically are. Locations can include locations within them called, "Sub locations”.

1) Log into your Reftab account: www.reftab.com/login
2) Click “**Locations**” > “**Edit Location**”



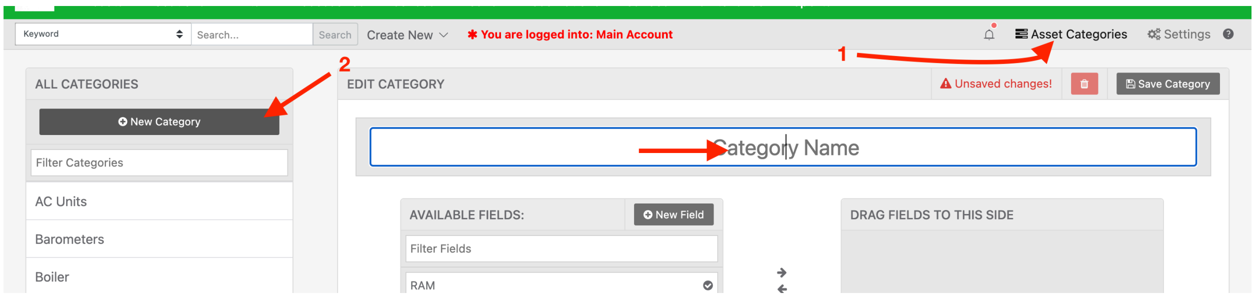
To edit sub locations: “**Locations**” > “**Sub Locations**”



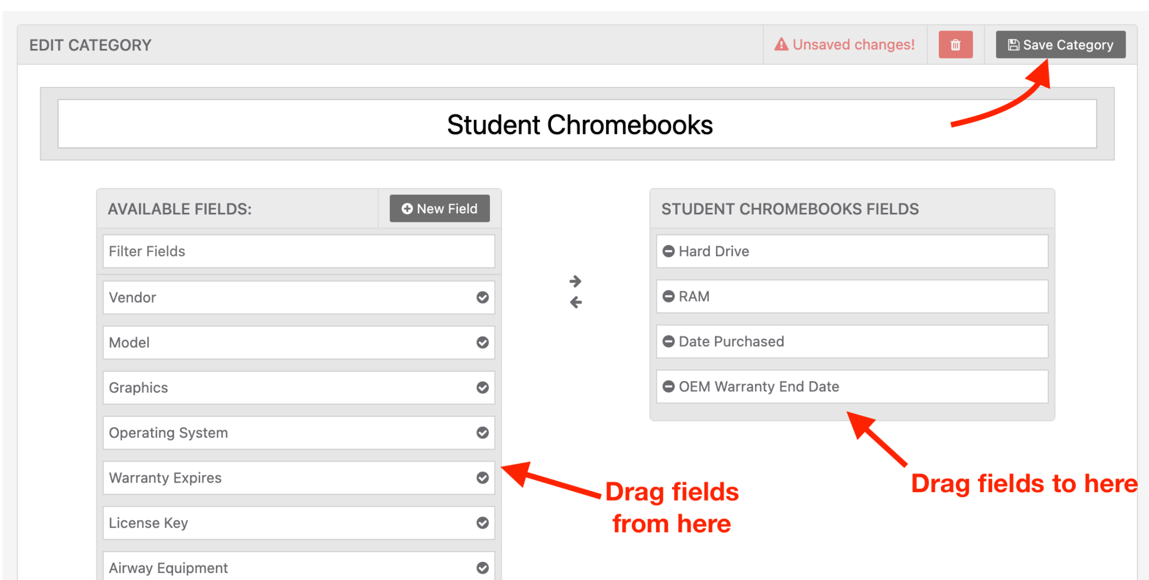
Adding / Editing Categories:

Categories group assets by similar type. For example: “Laptops”, “Desks”, “Monitors”, “Drills”, etc..

1) Log into your Reftab account: www.reftab.com/login
2) Click “**Asset Categories**” > “**New Category**”
3) Give the category a name.



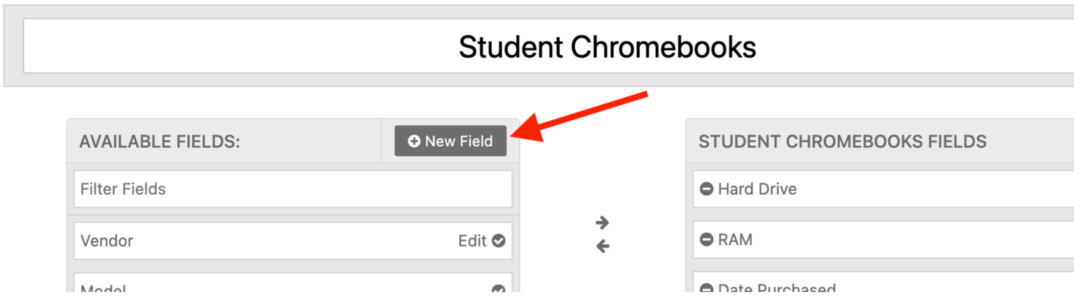
4) Drag fields from the “Available Fields” side to the right column. For example, in the screenshot below, a category called “Student Chromebooks” is being created. Each student Chromebook should be saved with information about the Hard Drive, RAM, Date Purchased and OEM Warranty End Date.



5) Click “**Save Category**” when done.

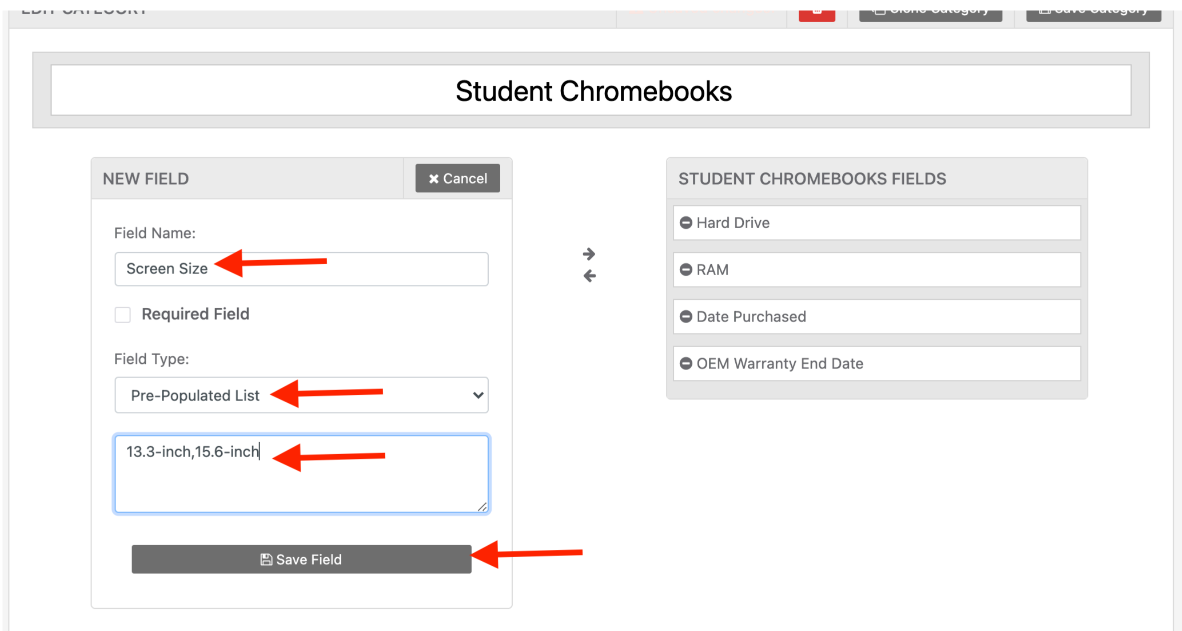
Adding new fields:

1) From the Categories page, click "**New Field**".

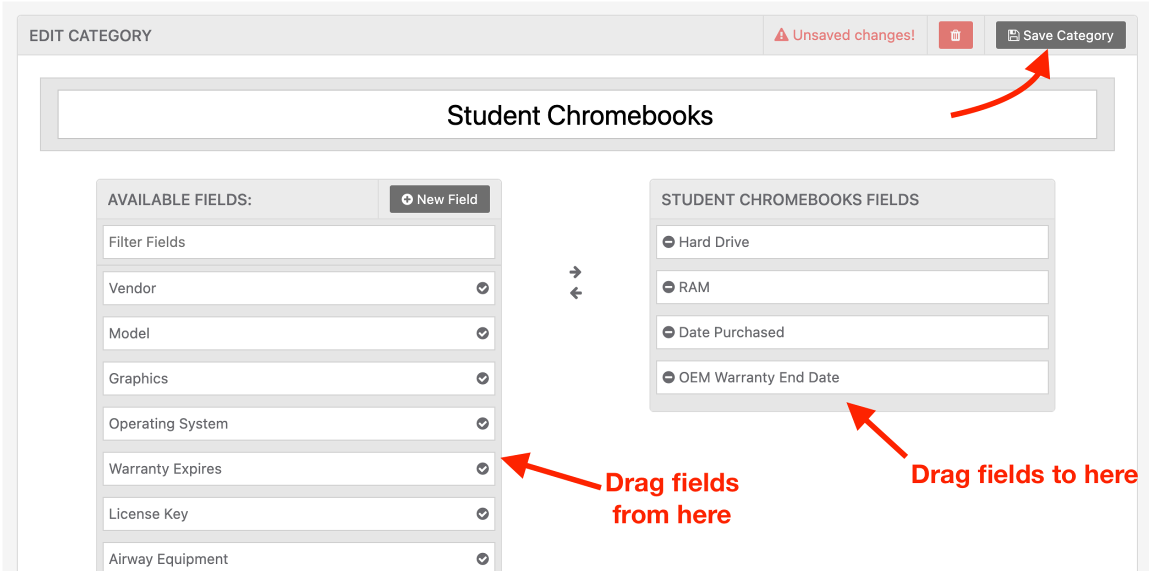


2) Next, give the field a name and set a field type. For example, if you wanted to capture the screen size of each student Chromebook, you can add a field with the type of "Pre-populated" list and provide set values such as "13.3-Inch" and "15.6-Inch".

3) Click "**Save Field**" when done.

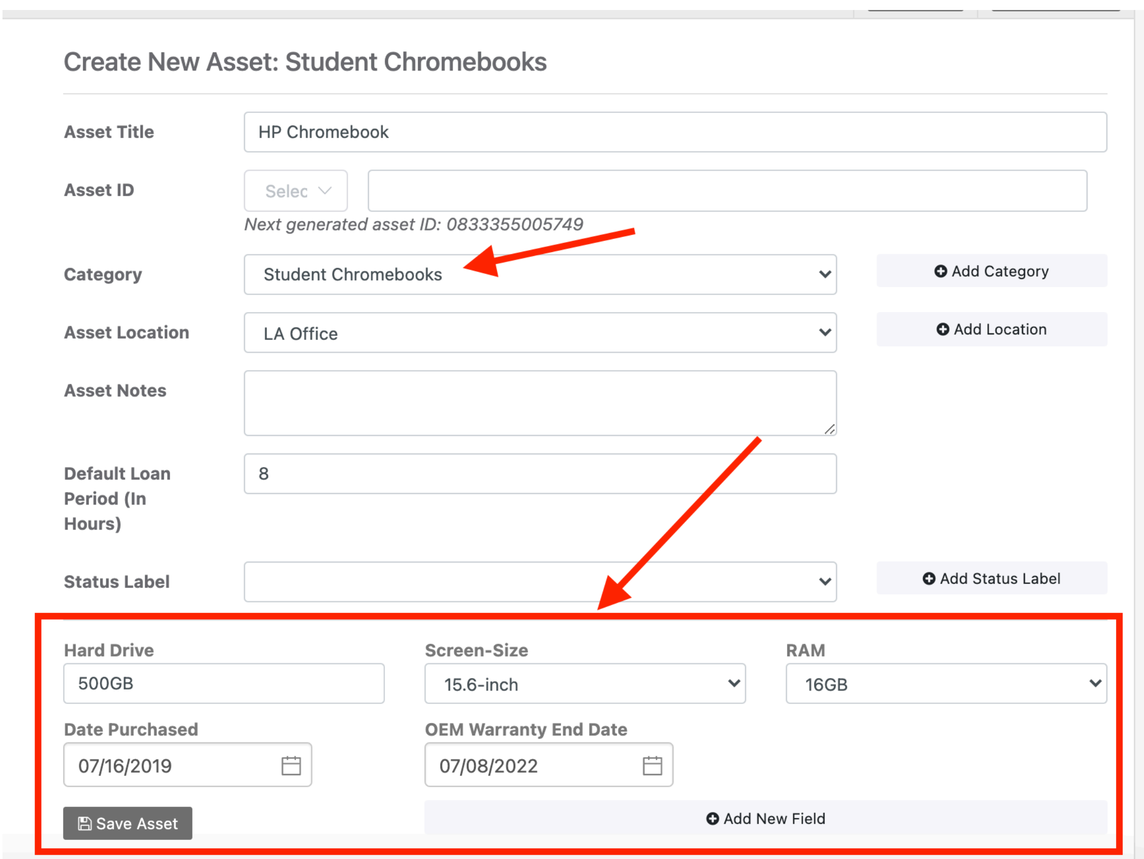


4) Next, **click & drag the field to the right column**

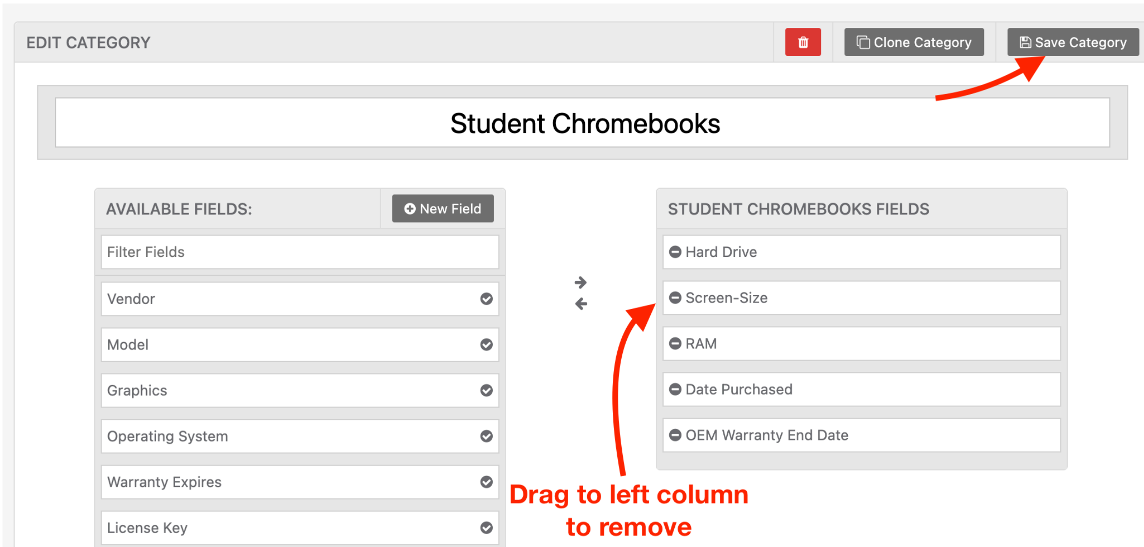


5) Click “**Save Category**”.

Now, whenever someone adds (or edits) an asset to the Student Chromebooks category, they will be able to add data to each of the fields saved:



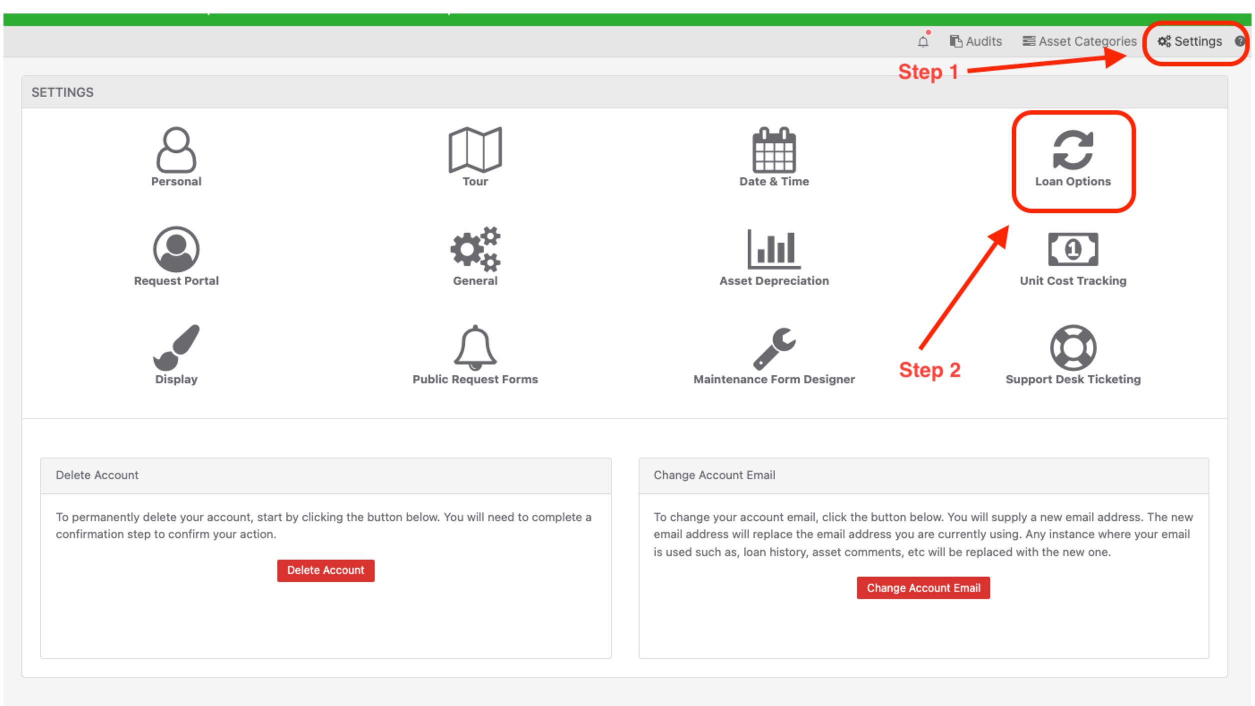
To remove a field, simply drag the field from the right column to the left and click "**Save Category**"

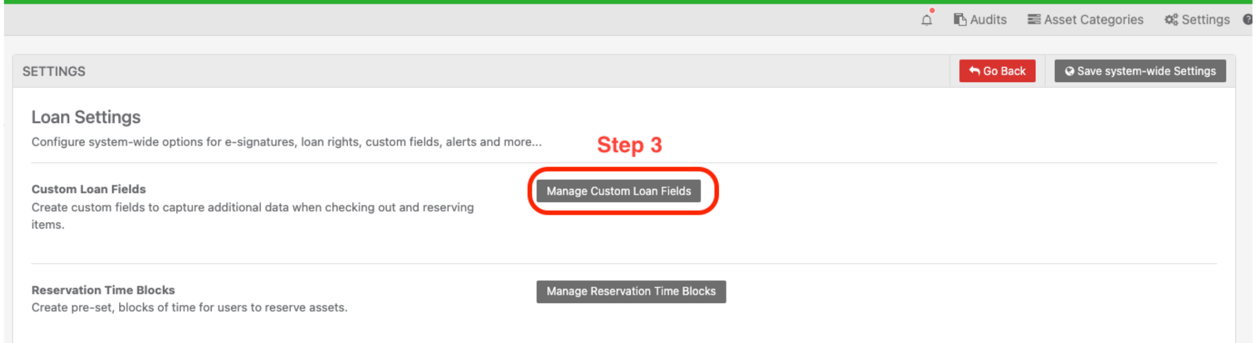


Adding Custom Fields when checking out

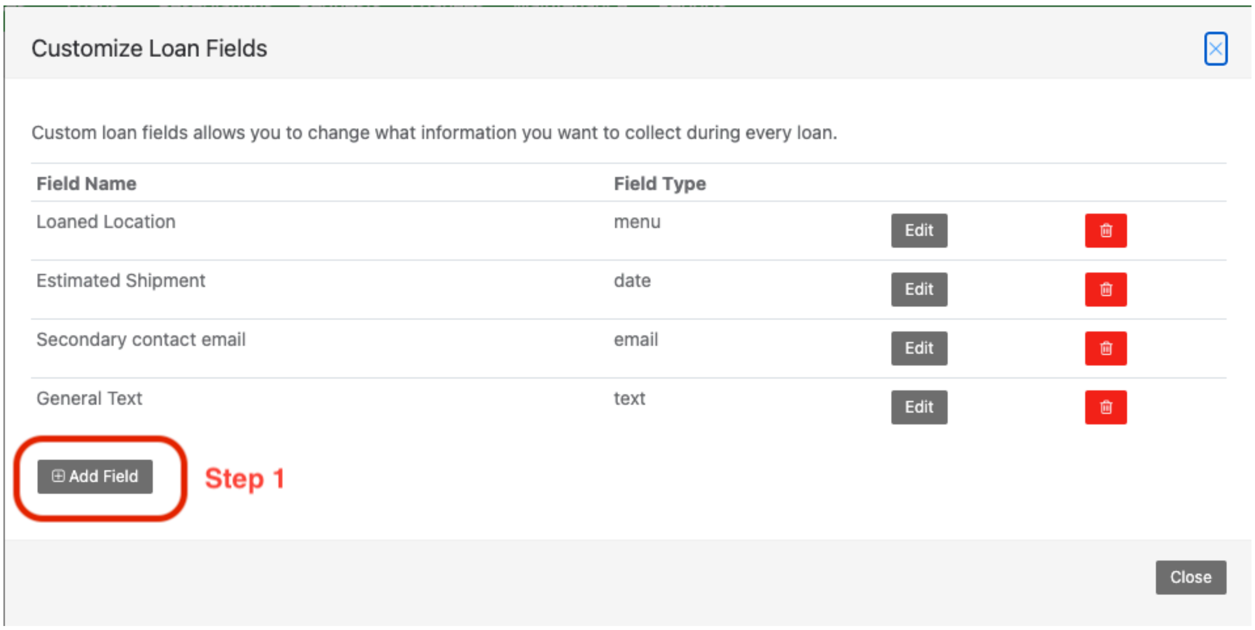
Custom fields can be added when checking out and reserving items, these can be used to capture addition data.

1) Log into your Reftab account: www.reftab.com/login
2) Click on "**Settings**" > "**Loan Options**" > "**Manage Custom Loan Fields**".

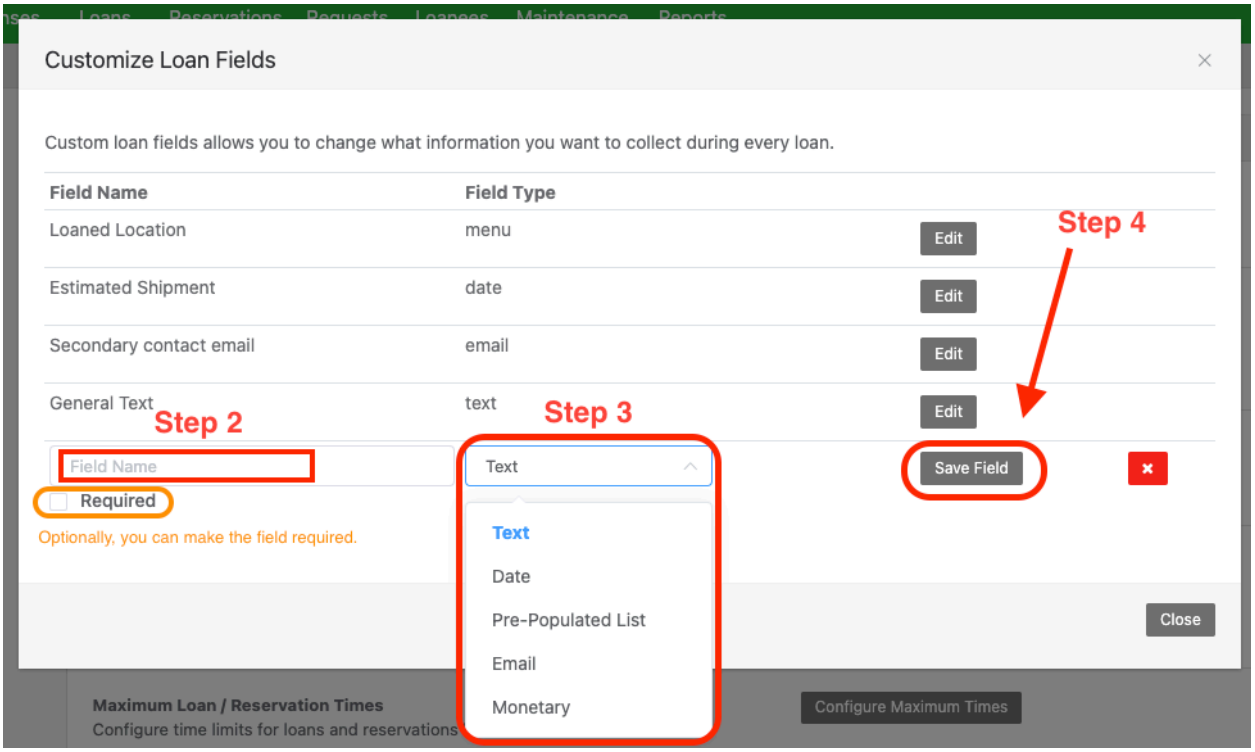




3) Here you can edit existing custom fields, or create new fields.
4) To create a custom field, click on "**Add Field**".



5) Name your field as you would like it to display when checking out or reserving an item for a loanee.
6) Set the **Field Type** to any of the permitted values. For example, if you wanted a field that collects the loanee's contact number, you would set the **Field Name** to "*Contact Number*" and the **Field Type** to "**Text**".
7) Additionally, you can mark this field as required so that the information **must** be captured before the item can be checked out/reserved.
8) Once you have filled out the required information, click "**Save Field**". See the image on the next page.



Add Automated Workflows

Reftab can perform actions based upon triggers and conditions. For example, if a new asset is created and the purchase price is greater than $500, make the vendor field required.

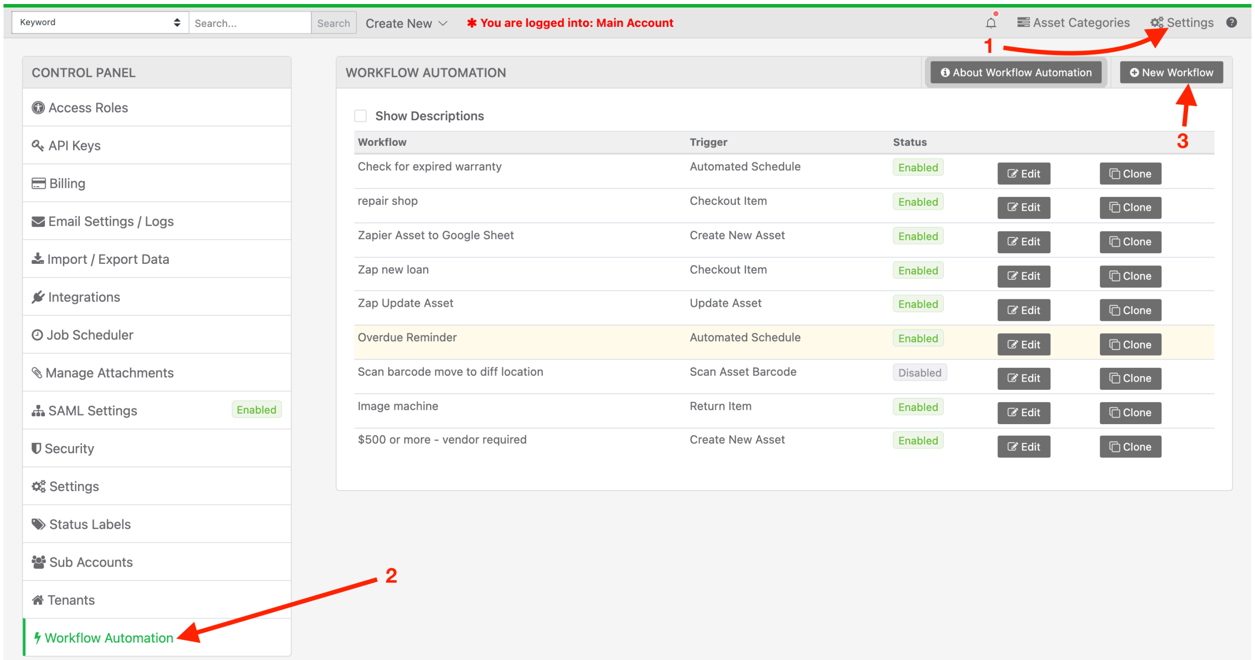
Log into your account and click “**Settings**” > “**Workflow Automation**”. Click “**New Workflow**”.

Add a workflow like seen in the image below:

Trigger: Create New Asset

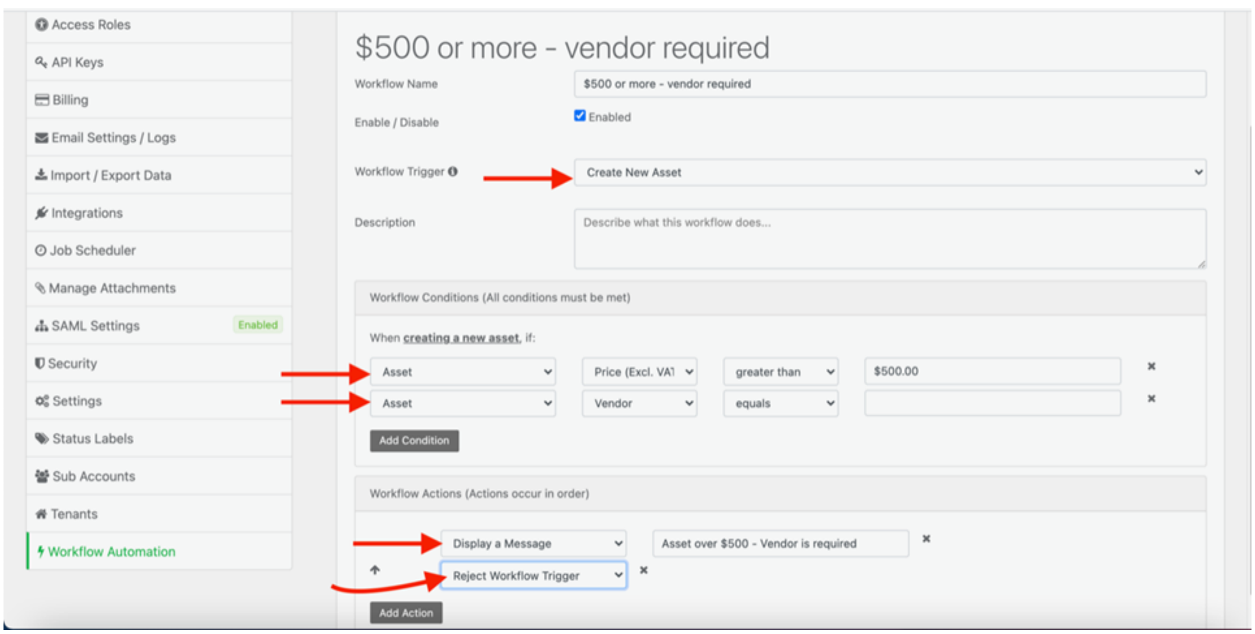
<u>Conditions:</u>

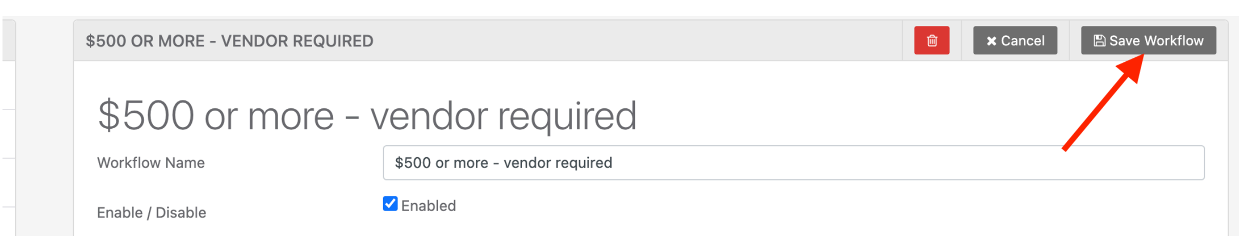
Asset Price greater than $500
Asset Vendor equals **leave blank**



Actions:

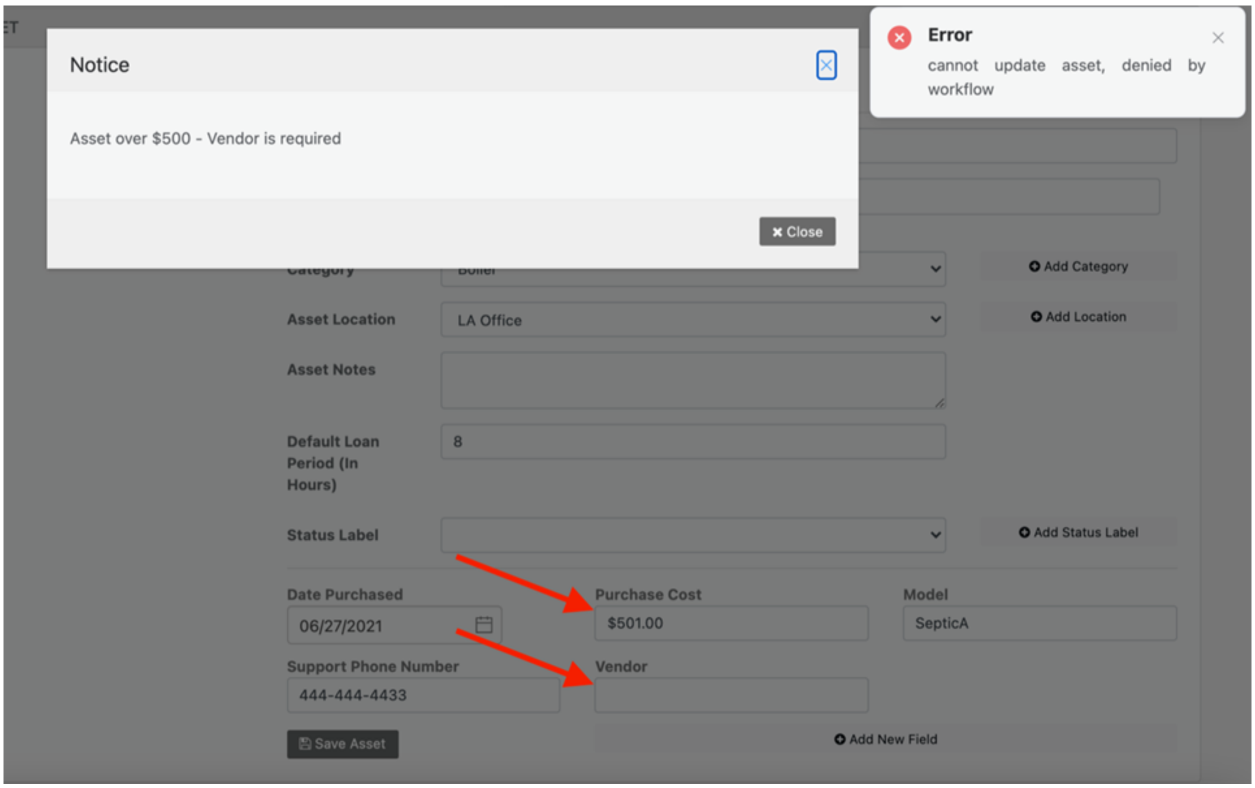
Display a message "Assets over $500 require a vendor"
Reject workflow trigger.





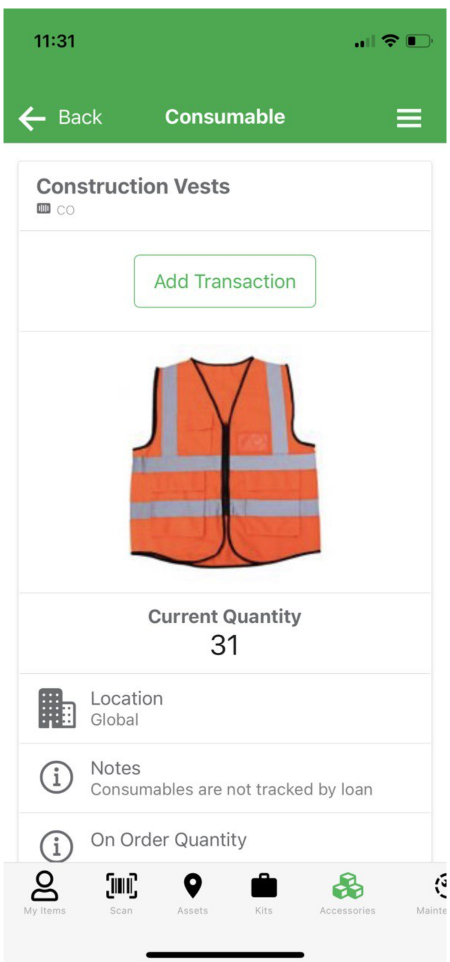
Click, “**Save Workflow**”

As an example, this screen shows what a user will see when they add a new asset and have a value over $500 for the purchase cost and vendor field is left blank:
(See screenshot on next page)



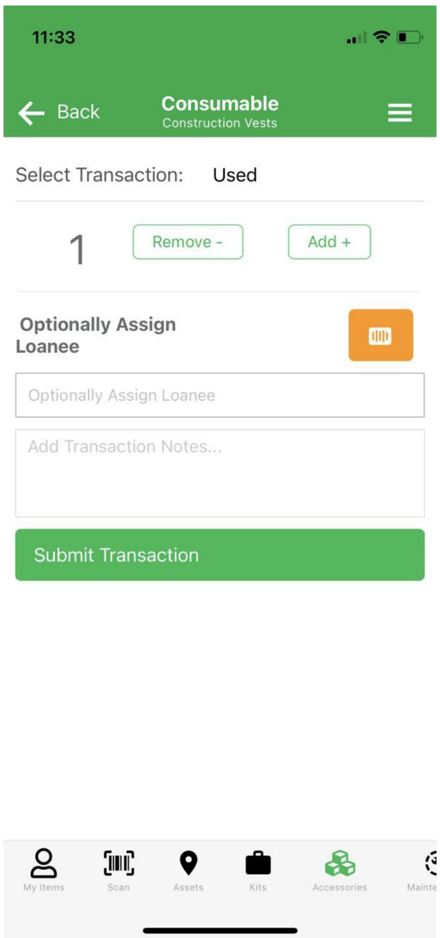
Performing Transactions on Consumables

When using consumable items such as clothing, printer ink, etc, you will update the current quantity by performing “transactions”. A transaction can be “used”, “found”, “purchased”, “lost”, “scrapping”.



By scanning a barcode of a consumable with the Reftab mobile app, you can pull up the consumable on screen and then tap “**Add Transaction**”.

Next, choose a transaction type such as, “used” if you’re using a consumable.



Then tap, “**Add**” and set the amount that you’re using.

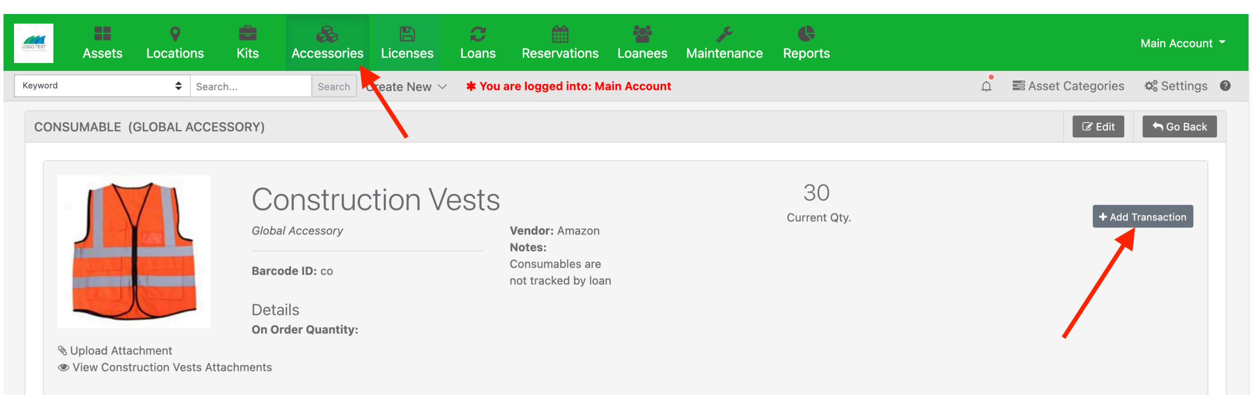
Next, if you’d like to attach a loanee’s name to the transaction, select a loanee.

Add any optional notes.

Then, tap “**Submit Transaction**”.

Your current quantity will adjust accordingly.

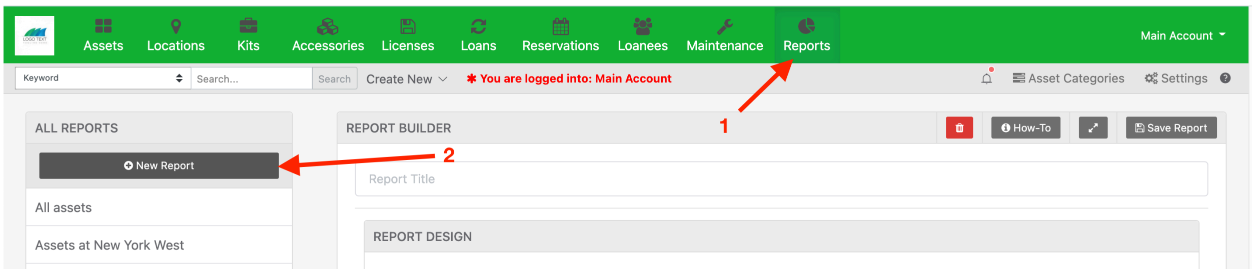
This process can also be done on the desktop site by clicking into the consumable and clicking “**Add Transaction**”.



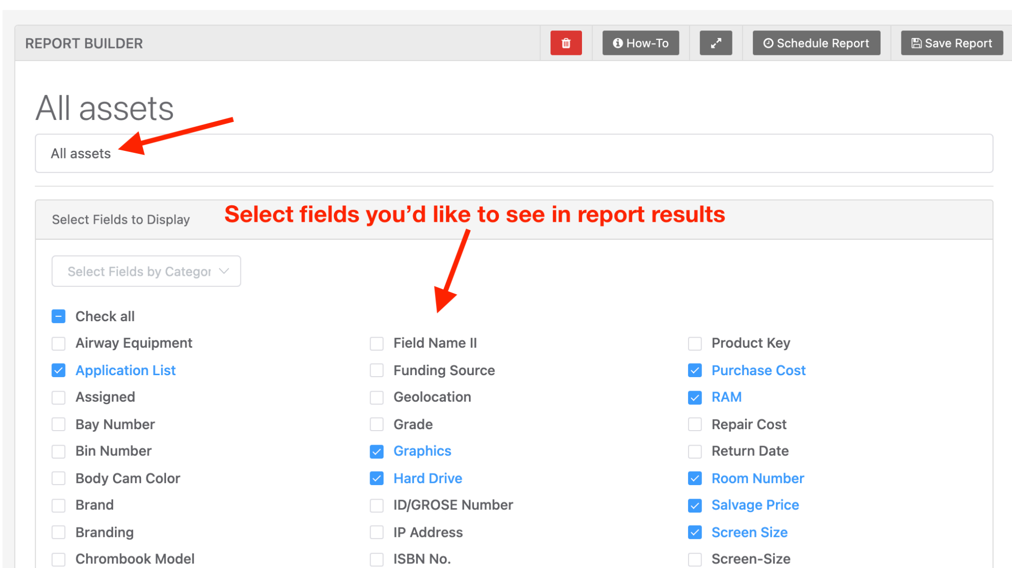
Running Reports

Reports can be run by users on the Reports page.

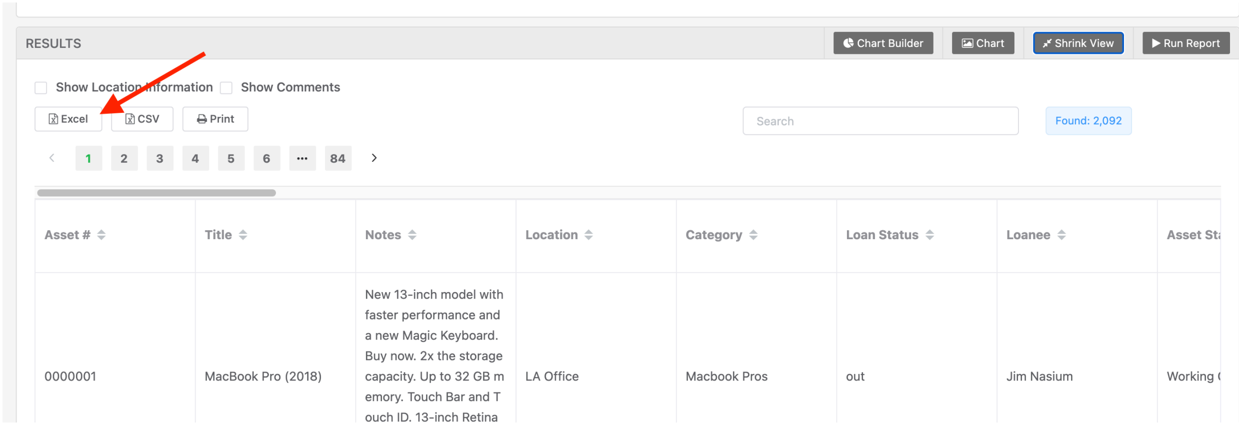
1) Log into your Reftab account: www.reftab.com/login
2) Click “**Reports**” > “**New Report**”.



4) Next, give the report a name and select the fields you’d like to see in the report’s results:



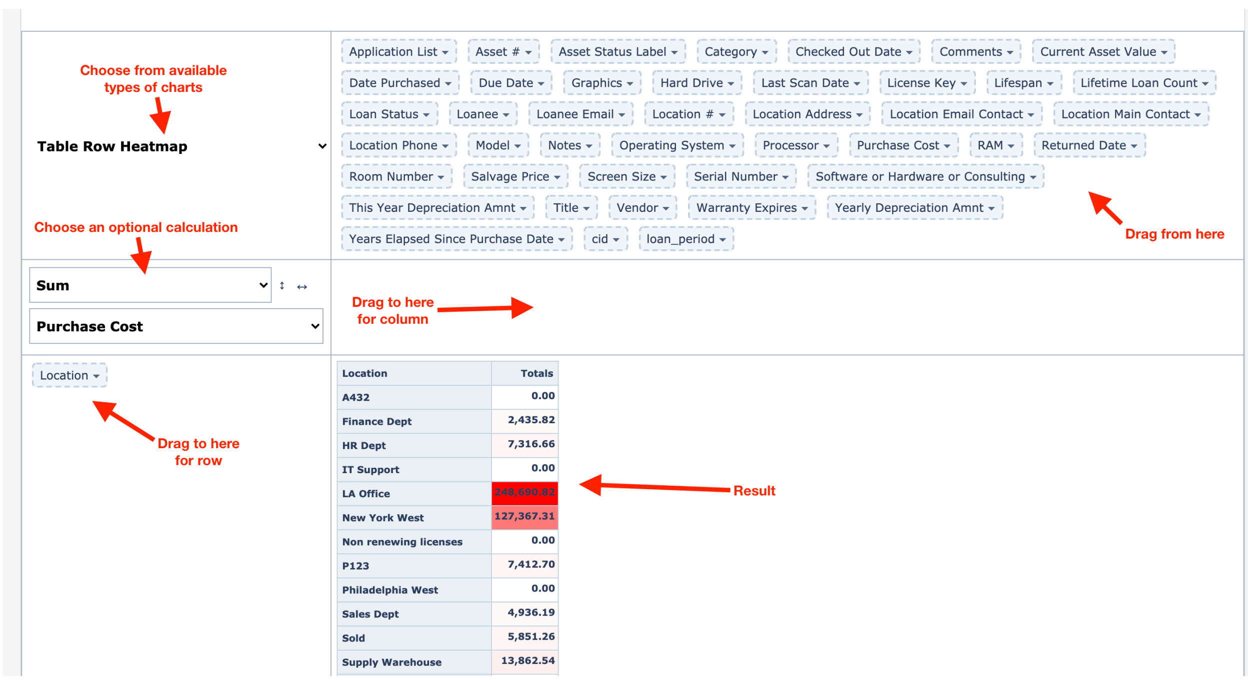
5) In the “Report Design” section, choose Show: “**Assets**” and click “**Run Report**”



6) Report results will display below and you can export the results to Excel, CSV or print PDF:

Chart Builder

You can create charts and graphs by clicking “**Chart Builder**” after a report runs and

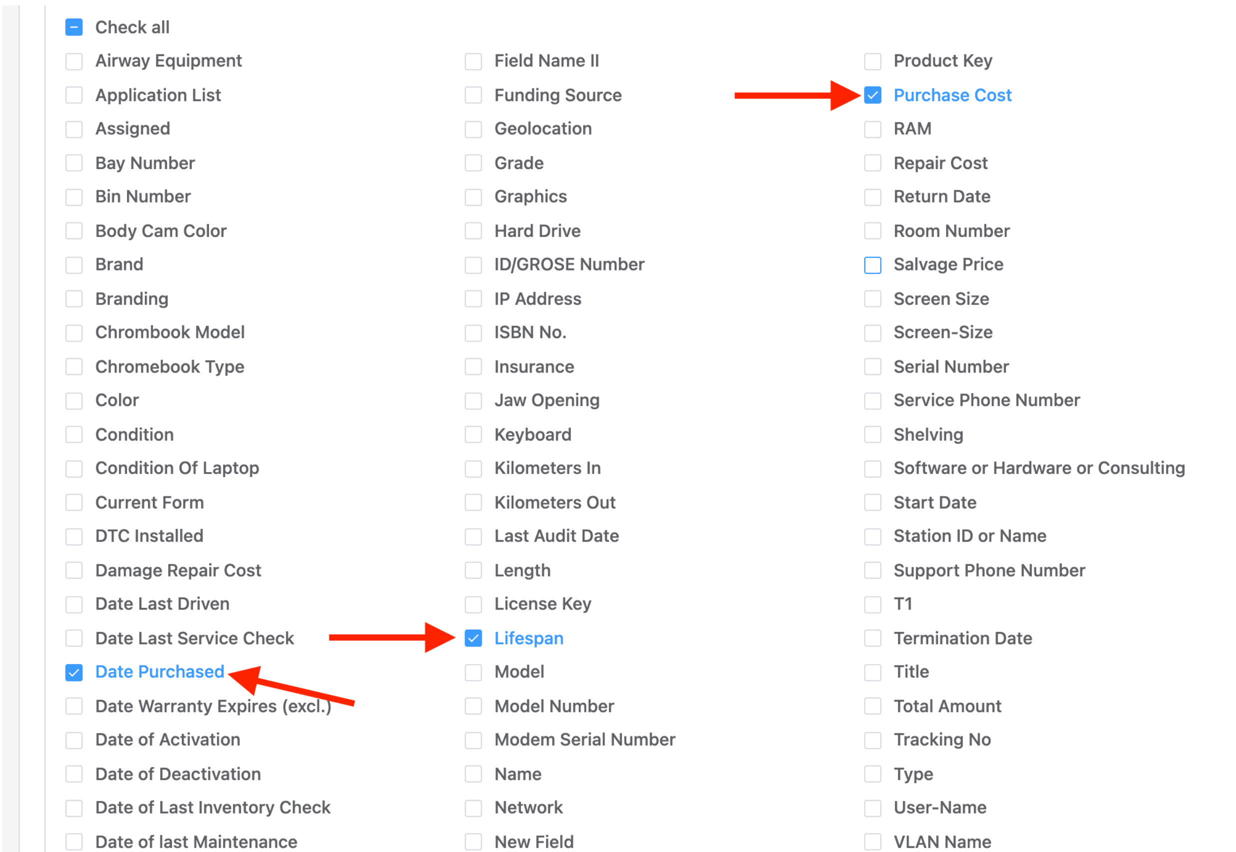


displays results.

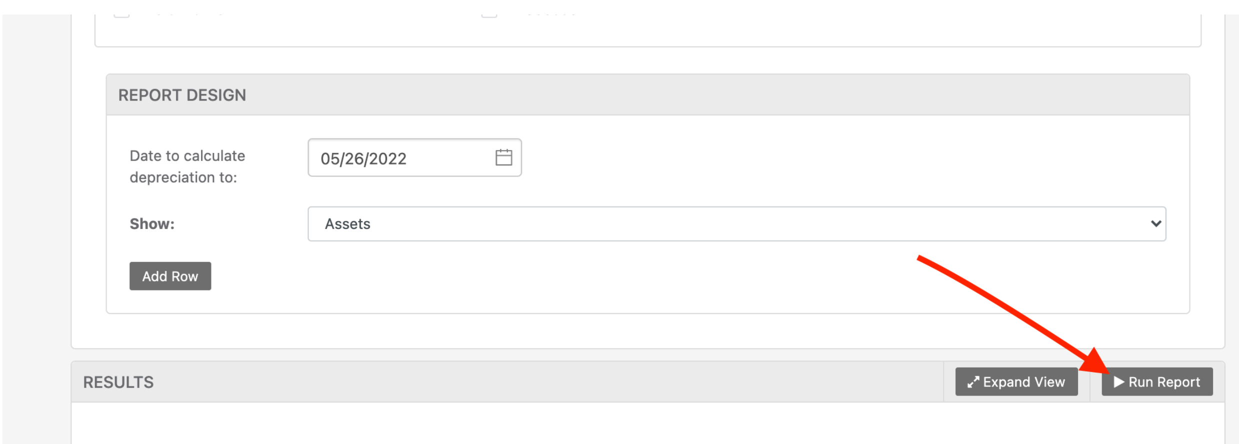
From here you can drag-and-drop fields and select from available calculations to build a chart:

Reports with depreciation

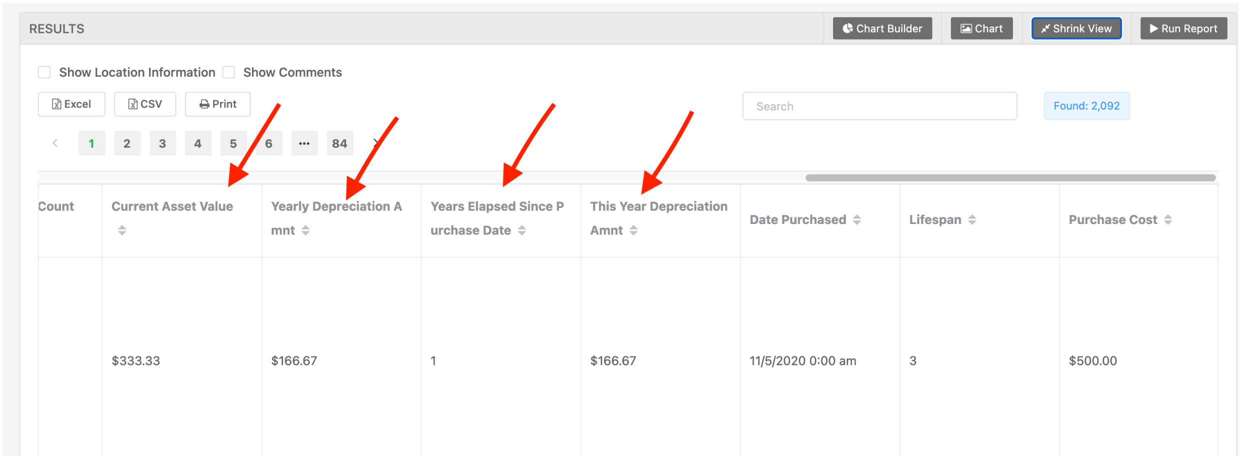
When building a report that shows deprecation, you need to select the asset fields that are used to calculate depreciation. (your Reftab administrator will be able to let you know which fields these are)



After you select the appropriate deprecation fields, you can click “**Run Report**”.

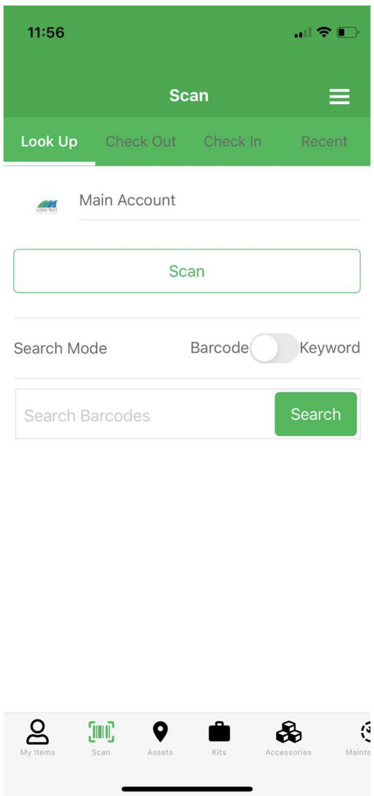


The results will include columns for deprecation:



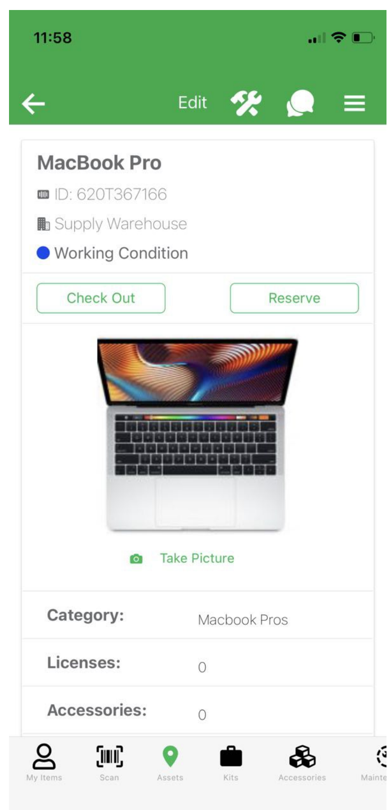
Check in / Check out Assets by Scanning:

1) Download the Reftab mobile app from the app store (Google Play or Apple)
2) Log in with your email address and password



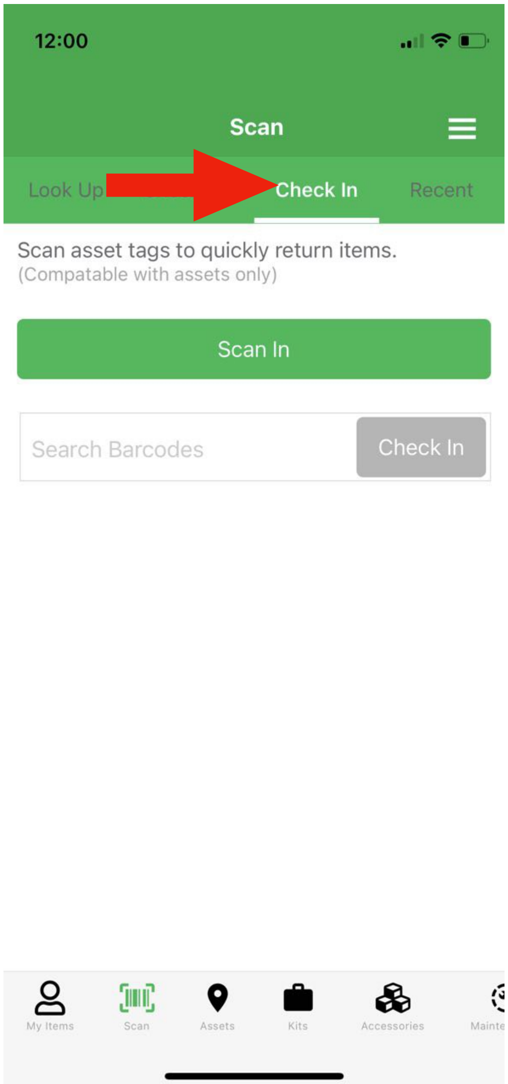
3)Tap “**Scan**” and camera will open

4) Point camera towards barcode or qr-code



5) The asset will appear on screen.
6) Tap “**Check Out**”
7) On the next page, you will select a return date
And add any notes and tap “**Check Out**”

How to check in assets (mobile app)



1) Go to the **Scan** page

2) Tap, “**Check In**”

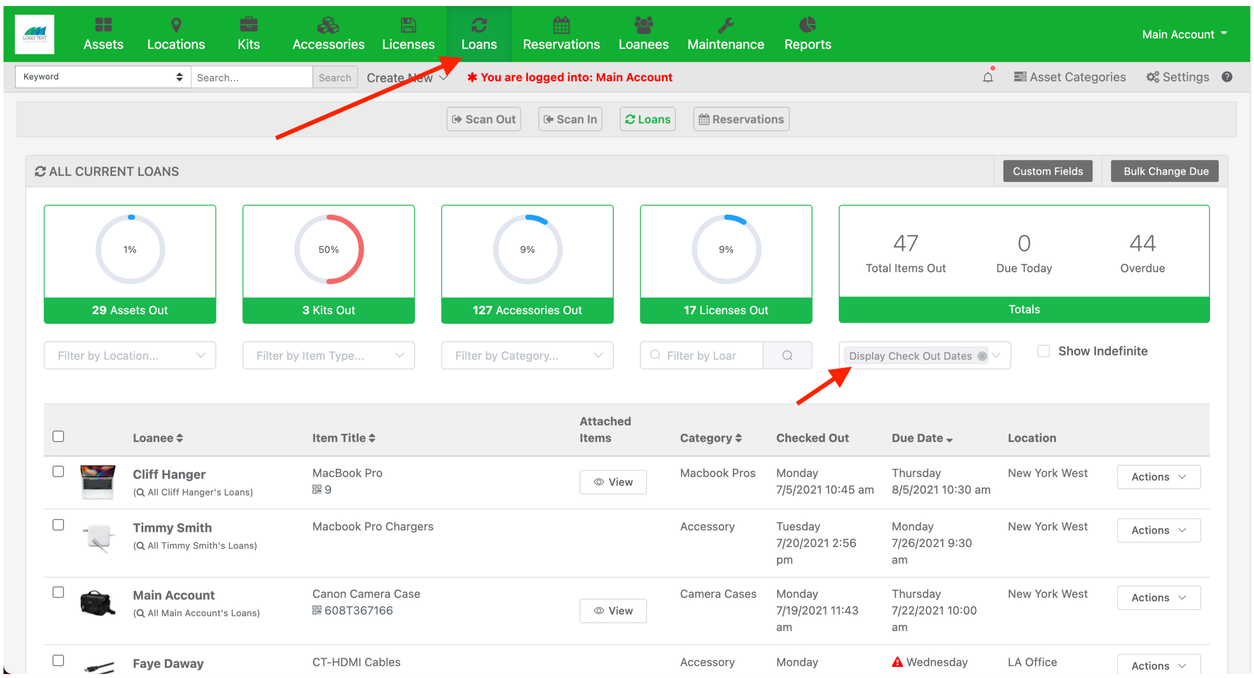
3) Then, tap the “**Scan In**” button. Camera will open.

4) Point camera towards barcode / qr-code and item will immediately be checked back into stock.

See Who Has What Items And For How Long

1) Log into your Reftab account: www.reftab.com/login
2) Click "**Loans**"

To view date of check out select "**Display Check Out Dates**".

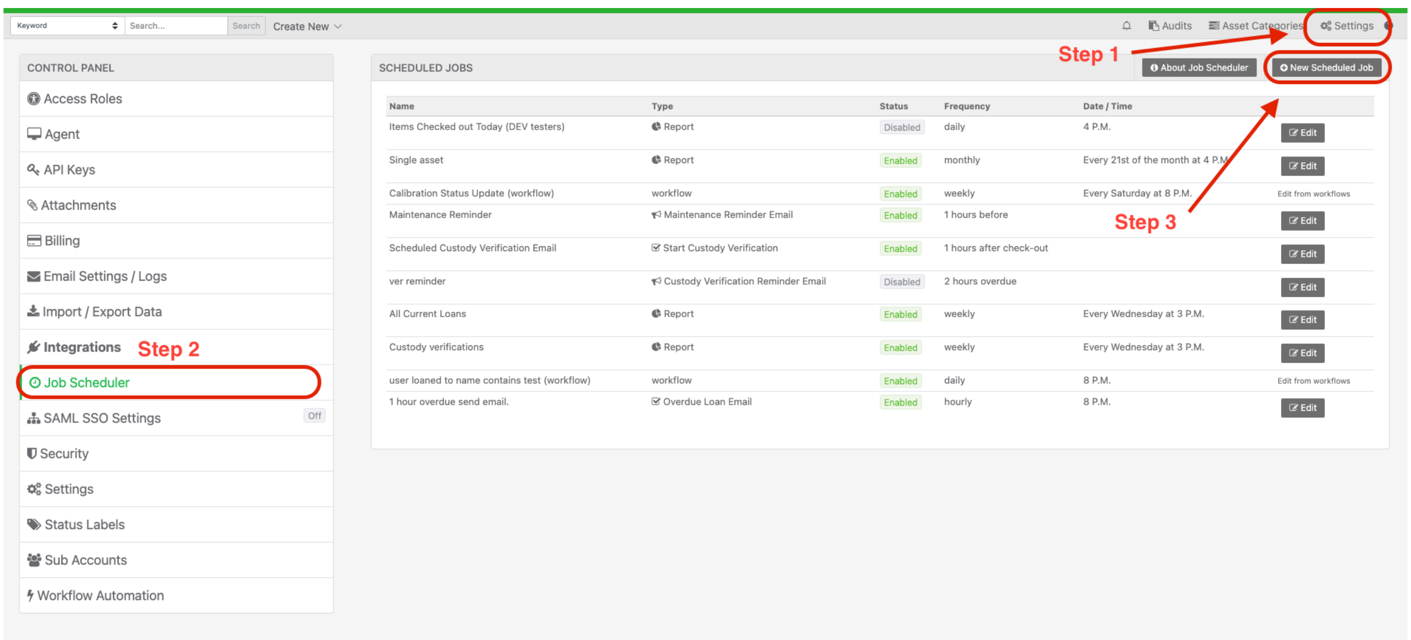


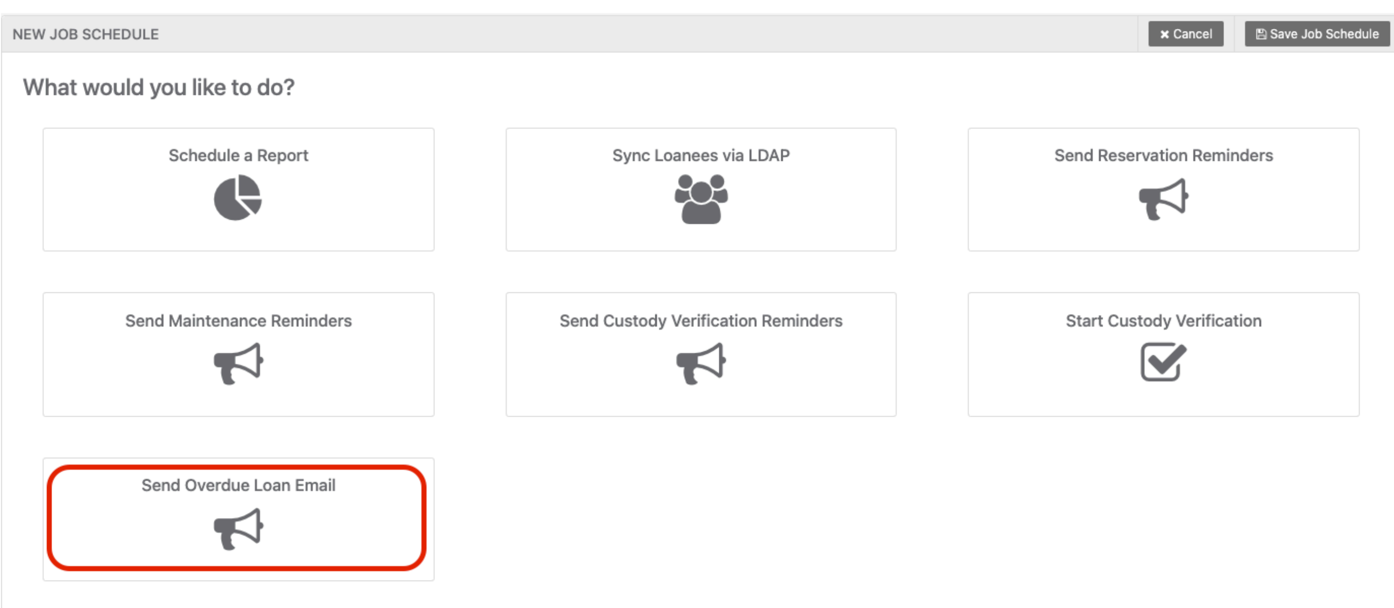
Automating Overdue/Return Emails with Job Scheduler

By default, Reftab will send 1 (one) overdue email reminder to the email address of the person who has the item within 24 hours of the item being overdue.

Automate the sending of additional emails

1) Log into your Reftab account: www.reftab.com/login as an administrator.
2) Click “**Settings**” > “**Job Scheduler**” > “**New Scheduled Job**” then click on “**Send Overdue Loan Email**”



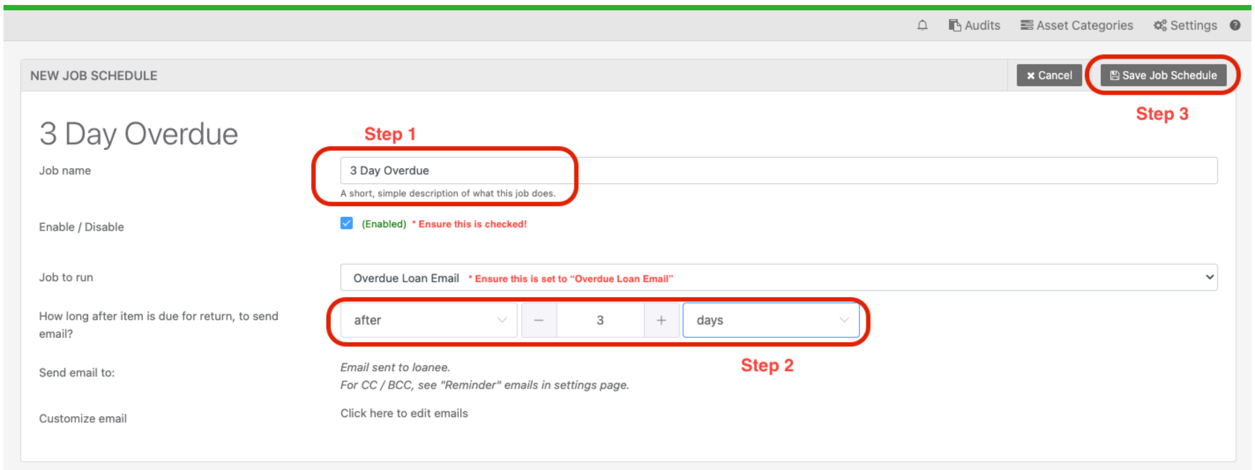


3) Name the new job. This should be a short description of what the job will actually do. In the example below we set it as "*3 Day Overdue*"

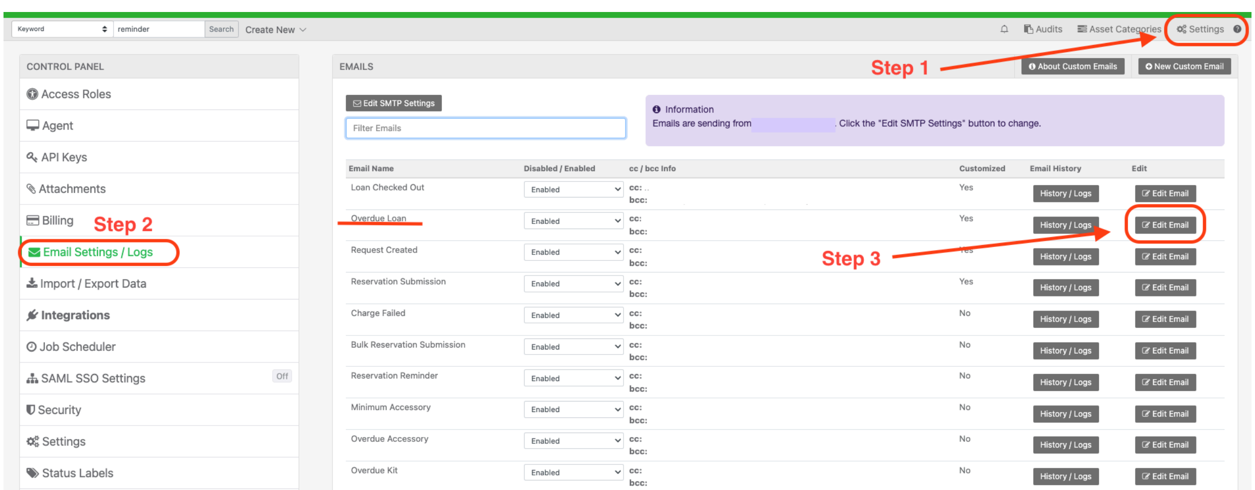
4) Set the values according to the amount of time you are wishing to target for overdue email reminders. In the example below we set it as "*after*" > "*3*" > "*days*". The last parameter can be set for hours, days, weeks, months, and years.

5) Ensure that "**Enable/Disable**" is checked off, and that the "**Job to run**" section is set to "**Overdue Loan Email**".

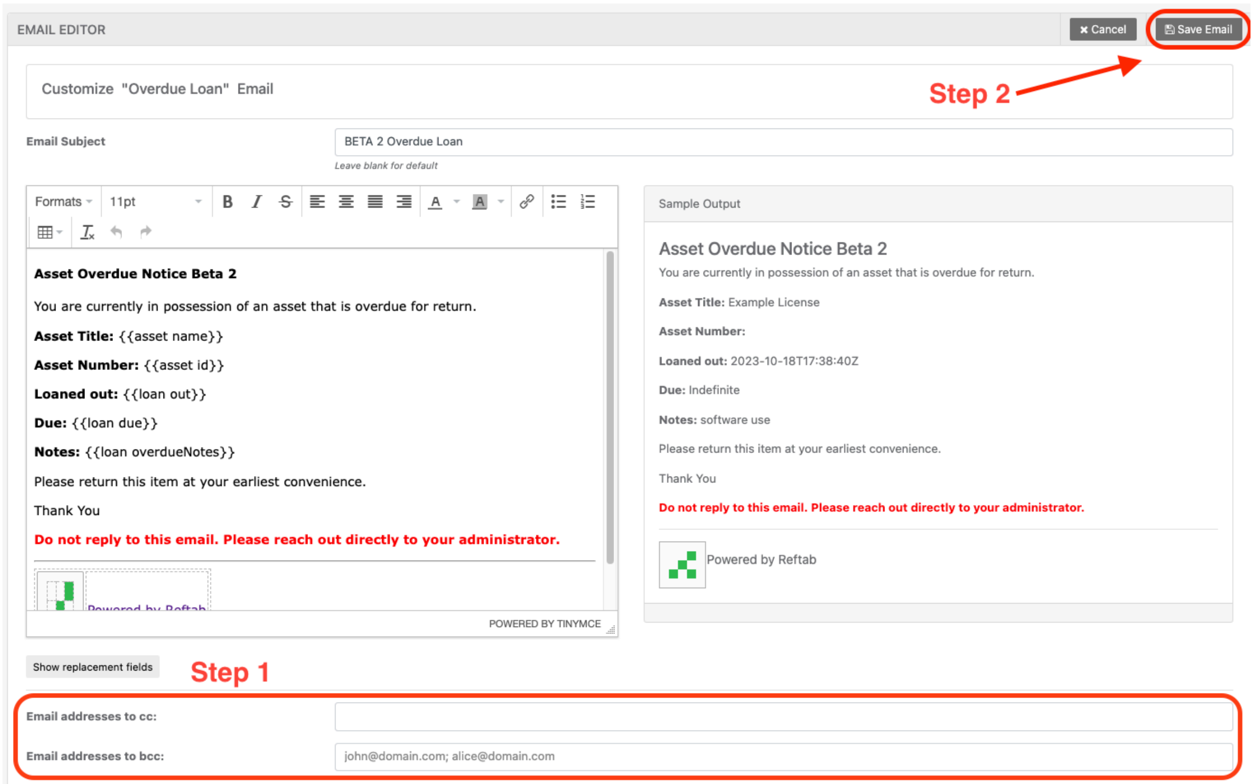
6) Click "**Save Job Schedule**"



7) Also, you can set additional CC/BCC to be sent alongside the email that is sent to the assigned loanee. These can be setup in "**Settings**" > "**Email Settings/Logs**". Then click on "**Edit Email**" for the line item "**Overdue Loan**".



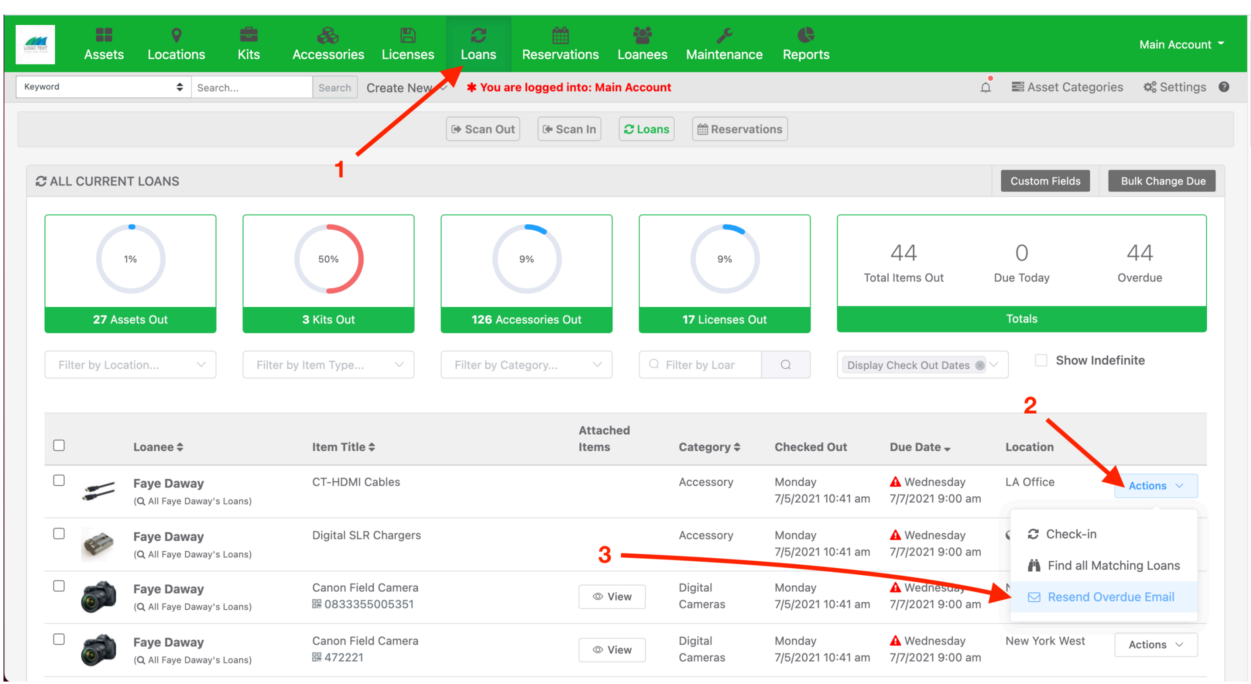
8) Here you can set the address to CC and BCC. Click on “**Save Email**” once you are finished.



Manually send overdue reminder emails

On the loans page, any item that is overdue for return will display a red icon.

Click “**Actions**” > “**Resend Overdue Email**”



Assign Assets

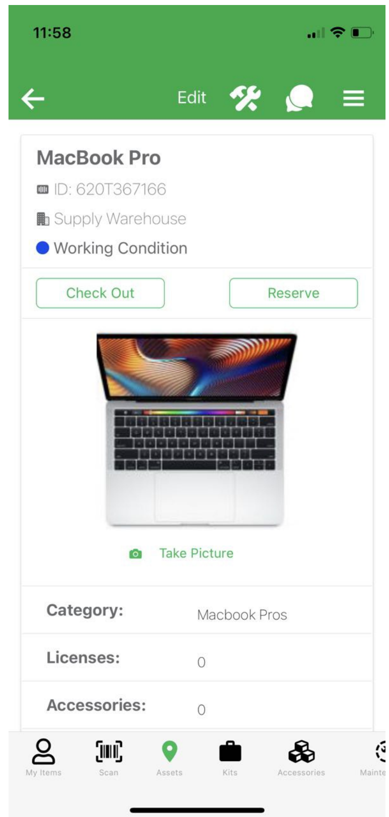
Assets can be checked out via the mobile app and desktop site.

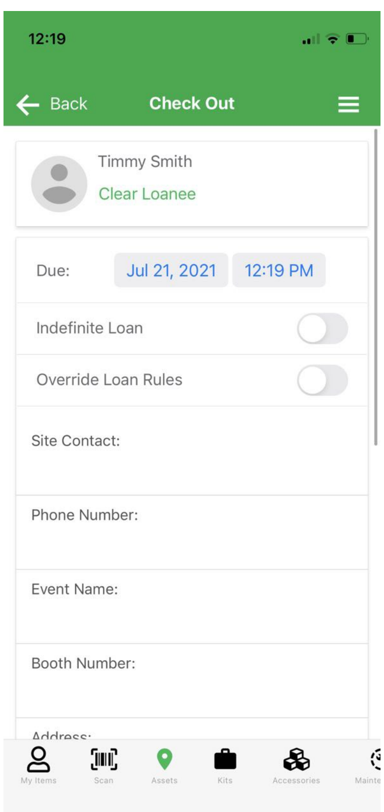
Mobile App

1) Log into the mobile app and search or scan a barcode:

2) The asset will appear on screen

3) Tap “**Check Out**”



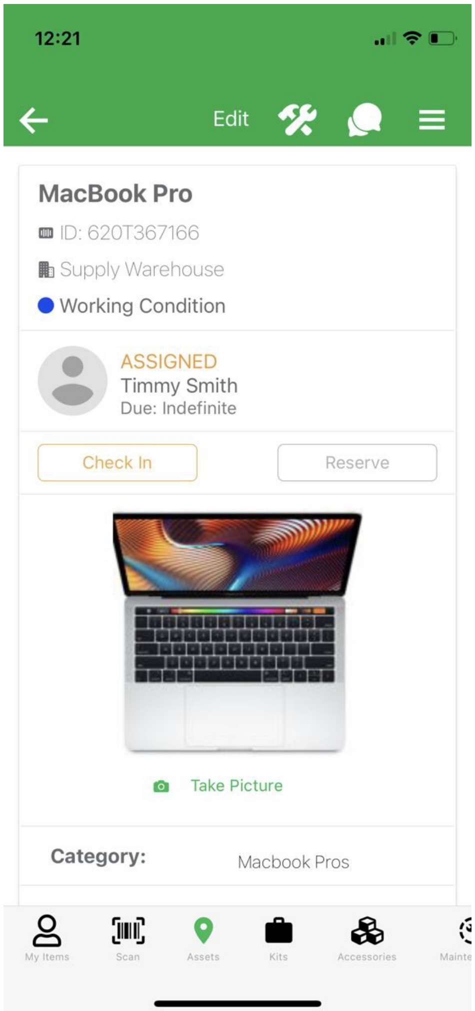


4) Search for a loanee by typing their name (or email address)

5) If you know the date of return, set a due date, if not select Indefinite loan.

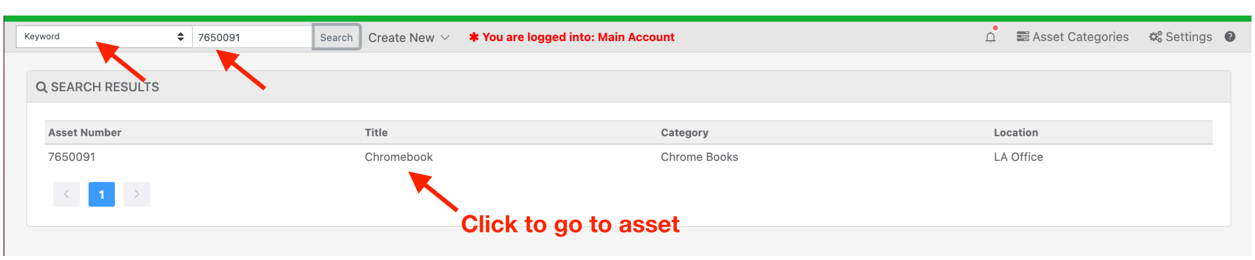
6) Tap “**Check out**” at bottom when done.

After the item is checked out, you'll see on the next screen that the item is assigned to the user you selected:

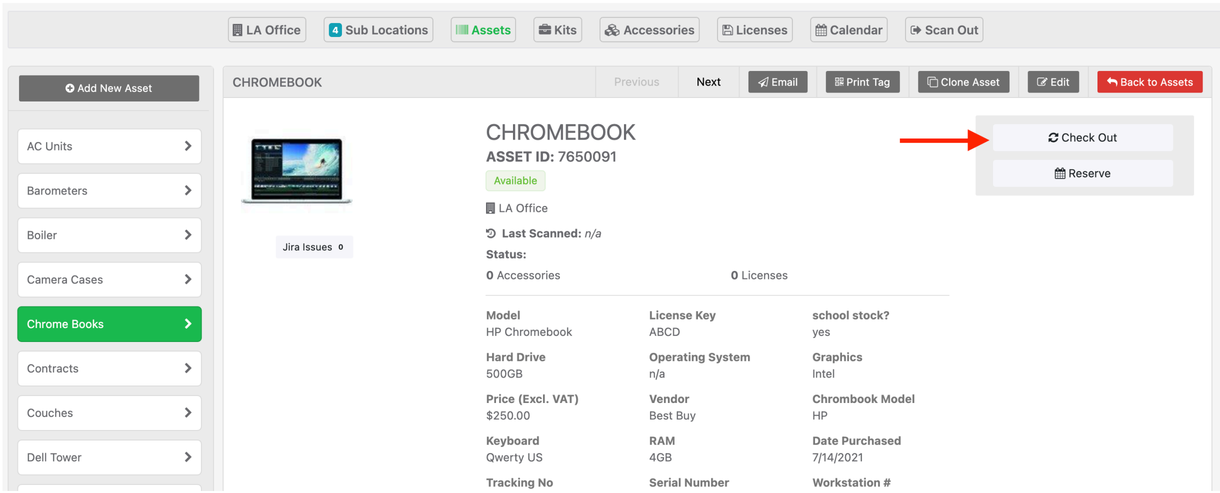


Desktop Site

You can easily search for assets using the keyword search input. For example, you can enter serial numbers, barcodes, asset titles, and if an asset matches, the result will appear:

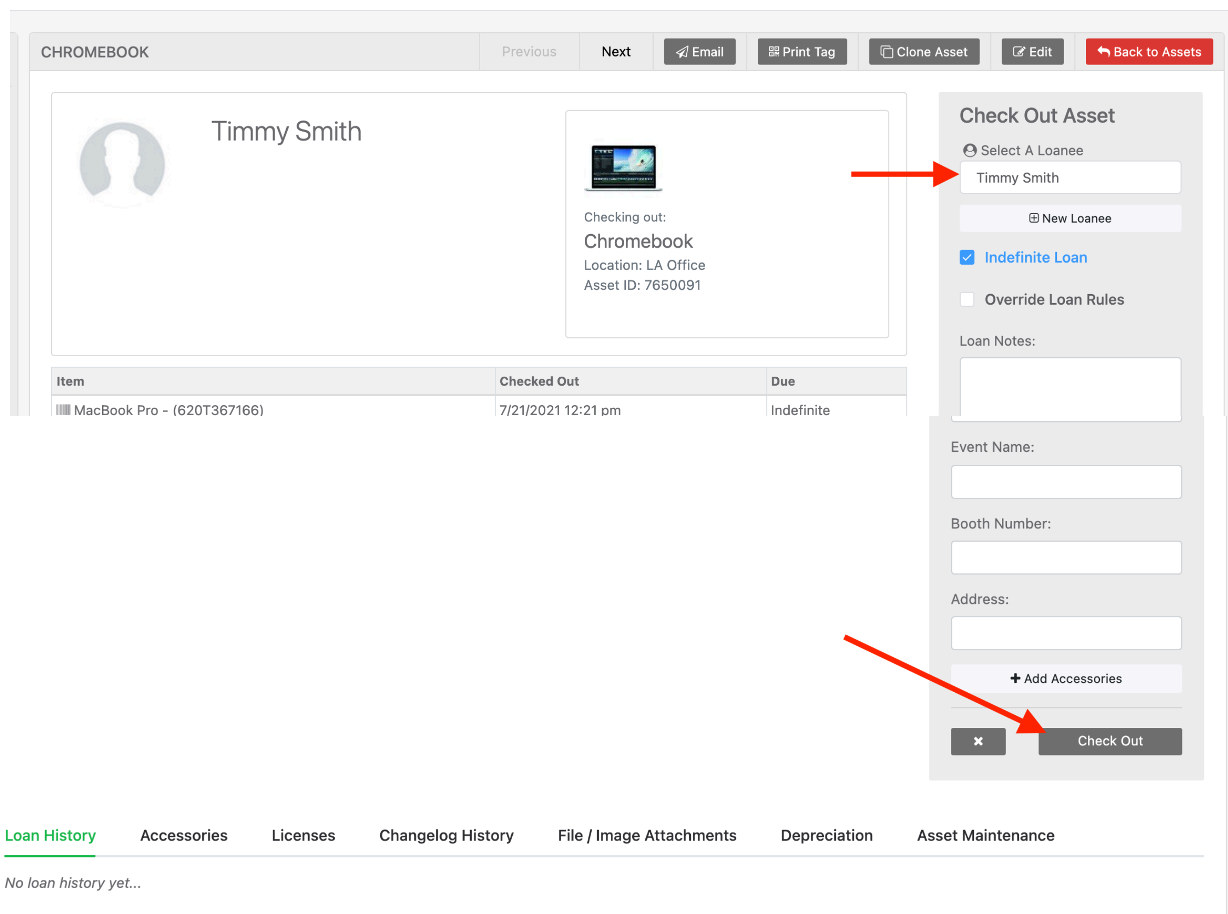


1) Click “**Check Out**”



2) Search for a user and set a return date (or set indefinite loan).

3) Click “**Check Out**”



The asset will be recorded as being out: