BIENNIAL INVENTORY MOBILE APPLICATION
iOS GUIDE

UNIVERSITY OF ILLINOIS SYSTEM

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Installation and Setup

The Biennial Inventory app is available for Android and Apple iOS platforms. Before you buy a device or try to download the app, you should be aware of the following minimum device and software requirements.

Device	Recommended Screen Size	Hardware Requirements	Operating System Requirements
Android Tablet	7 inches or larger	No minimum hardware requirements	Android 5.0 and above
Apple iOS iPad	9.7 inches or larger	Apple iPad Pro or iPad 4th generation or later	iOS 10.0 and above

This guide covers using the app on iOS only. For Android instructions, check the Biennial Inventory Mobile Application Android Guide.

NOTE: The Biennial Inventory mobile app should **only be installed and used on university-owned devices**. The app is designed for use on tablets. Based on this requirement and the amount of information/detail to view, using the app on a phone is not recommended.

Installing the App

By default, iOS devices only allow app installations from iTunes. However, the Biennial Inventory app is not available in the iTunes store. To install the Biennial Inventory app, you must download and install another app first. This app is called Beta by Crashlytics. Once you've installed it, this app will register your device with AITS. Then, you can download and install the Biennial Inventory app.

Follow these steps to download and install both the Beta by Crashlytics app and the Biennial Inventory app.

Step	Task
1.	Email aitsmobiledevservice@uillinois.edu to request access to the app. Include your email address, first name, and last name in your request. **NOTE:** You'll get an email from *AITS Mobile Dev Services* when your access has been set up.
2.	Make sure you're connected to a University of Illinois Wi-Fi network and can open email on your iOS device. **NOTE:** Contact your system administrator if you need help connecting or opening email.
3.	Open the email from *AITS Mobile Dev Services* on your iOS device.
4.	Tap the **Let Me In** button in the email message. This opens a new tab or window.
5.	Enter your name in the new tab or window.
6.	Tap the **Next** button.
7.	Tap the **Next** button again.
8.	Your iPad displays this message: *This website is trying to open Settings to show you a configuration profile. Do you want to allow this?* Tap **Allow**.
9.	Tap **Install** to begin installing the Beta app.

Step	Task
10.	Enter your iPad passcode at the prompt.
11.	Tap **Install** again.
12.	Tap **Done**. This completes installation of the Beta app.
13.	You'll get another email from *AITS Mobile Dev Services* for installing the Biennial Inventory app. Make sure you're connected to a University of Illinois Wi-Fi network and can open email on your iOS device. **NOTE:** Contact your system administrator if you need help connecting or opening email.
14.	Open the email from *AITS Mobile Dev Services* on your iOS device.
15.	Tap the **Open on Your Device** button in the email message. This opens a new tab or window.
16.	Tap the **Install** button in the new tab or window.
17.	Your iPad displays this message: *apps.crashlytics.com would like to install Biennial iOS.* Tap **Install**.
18.	Check your iPad home screen for the Biennial Inventory app.

NOTE: As an app user, you'll get an email when a new version of the Biennial Inventory app is released. The steps to upgrade the app will be similar to steps 13-17 above. However, you won't need to install the Beta by Crashlytics app again.

Connecting to the App

Before you start using the Biennial Inventory app, you should make sure that your device is connected to a University of Illinois Wi-Fi network.

The app automatically syncs with the web-based version of the Biennial Inventory system. If your device happens to lose its network connection while you're using the app, the app will automatically store data in the device's memory until it can reconnect. Once your device reconnects, it will sync again automatically.

NOTE: Your inventory list should be loaded in the Biennial Inventory web version **before** you log in to the app. You cannot load the inventory list from the app.

Follow these steps to log in to the Biennial Inventory app and open your inventory list.

| Step	Task
1.	Make sure you're connected to a University of Illinois Wi-Fi network.
2.	Tap the Biennial Inventory app icon on your device's home screen.
3.	Type your NetID and password in the appropriate fields.
4.	Tap the **Log In** or **Go** button.
5.	Tap the appropriate inventory cycle under **Select Cycle/Org(s)**, if needed.
6.	Tap a Chart and Organization combination to load. **NOTE:** Depending on your connection, opening the list may take a little while.
7.	Close the app or tap the **Logout** icon when you're done using the Biennial Inventory app.
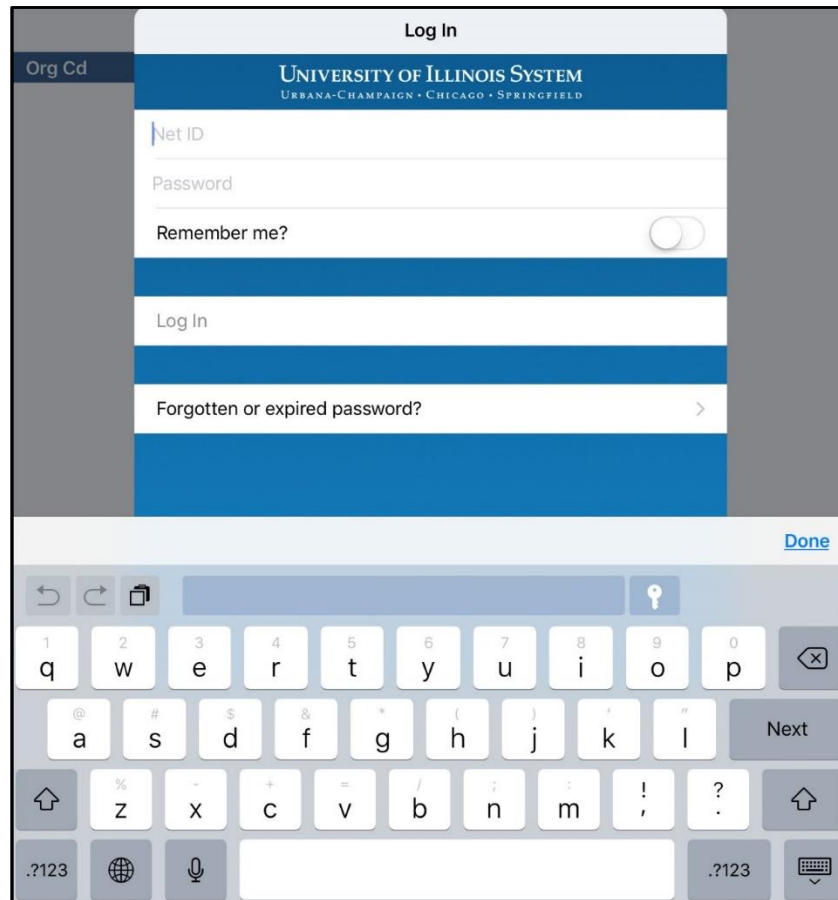
Figure 1: App Login Screen

Using a Scanner

There are two ways to use the app to scan PTags. The first way is with your device's camera. The other way, which is recommended, is to use a paired Bluetooth scanner. A scanner can easily scan and read PTags with bar code labels to automatically identify the item and item details for updating attributes and verifying the item status.

There are many scanners that can work with the Biennial Inventory app. If you choose to use a scanner, make sure it satisfies these minimum requirements:

- Supports iOS 10.0 and above
- Supports HID (Human Interface Device) mode

Check the scanner instructions or ask your system administrator how to pair it with your device. Once the scanner is set up and paired with the device, make sure the cursor is in the **Search** field on the Biennial Inventory app before you scan a PTag with the scanner.

App Support

Email aitsmobiledevservice@uillinois.edu to request access to the app.

Before or during app installation and setup, contact your system administrator if you need help.

If you have technical problems with the app after installation, send a message to aitsmobiledevservice@uillinois.edu.

Using the Inventory List

The inventory list contains all the equipment items assigned to your unit's Organization code. You'll use the inventory list throughout the rest of the inventory cycle, as you conduct physical inventory.

NOTE: Unit Contacts must load inventory lists in the web-based version of the Biennial Inventory system before using the mobile app. You will not be able to see any inventory records in the app if the list has not been loaded. Go to Loading the Inventory List for instructions.

Load your inventory list by logging in to the web-based Biennial Inventory system at https://apps.obfs.uillinois.edu/fixedassets/biindex.cfm.

Sorting and Filtering the List

Sorting and filtering the inventory list in the app is similar to the **Manage Inventory** page in the web-based version of the Biennial Inventory system. You can also search for specific items by keyword, PTag, or other criteria.

You can sort the inventory list by:

- The primary PTag number, if the item is part of a family (with parent and child components).
- The item's PTag number.
- The status of each item (Unverified, Verified, or Pending/Unfound).
- The relevant Chart and Organization code.
- A description of the item.
- The serial number/Vehicle Identification Number (VIN) of each item.
- The custodian of each item, if one is listed.
- The item's location (the Location code, building name, and room number).
- The item's commodity code.
- The item's Equipment Manager, if one is listed.

You can also specify whether to sort results in ascending or descending order. This corresponds to the up and down arrows in the web-based version of the Biennial Inventory system.

The **Sort/Filter Items** icon looks like several horizontal lines, as shown below. It's at the top of the screen when you're viewing the inventory list, along with the **Search** field. You can type a keyword into the **Search** field, or you can use speech-to-text to speak a keyword by tapping the microphone icon in the keyboard. If you're using the device's camera or a scanner, scanning a PTag barcode will populate the **Search** field.
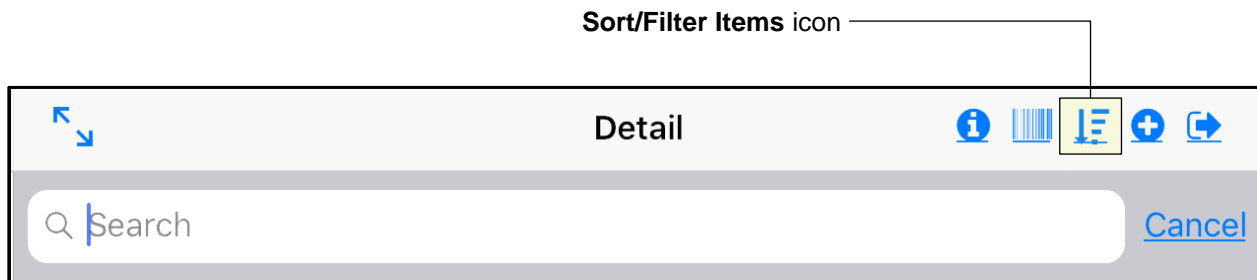

Figure 2: Search Field and Sort/Filter Items Icon

Use the following steps to sort the inventory list and search for an item by keyword in the Biennial Inventory app.

Step	Task
1.	Log in to the Biennial Inventory app and open your list as shown in the **Installation and Setup** section.
2.	Tap the **Sort/Filter Items** (horizontal lines) icon.
3.	Tap to select or clear the status(es) to display under **Statuses to Show**.
4.	Tap **Ascending** or **Descending** to select the sort order.
5.	Tap one of the following criteria to sort the inventory list: • **Primary PTag** • **PTag** • **Status** • **Chart** • **OrgChart** • **Description** • **Serial #/VIN** • **Custodian** • **Location Code** • **Location Title** • **Commodity** • **Equipment Mgr.**
6.	Tap **Apply** in the top right corner.
7.	To search for an item, type a keyword in the **Search** field. Tap the **Search** button when done typing to hide the keyboard. OR Tap in the **Search** field and tap the microphone icon to speak a keyword.
8.	Scroll down to see search results, if needed.
9.	Close the app or tap the **Logout** icon when you're done using the Biennial Inventory app.

‹	Sort/Filter Items	Apply
Statuses to Show		
Unverified		✔
Verified		✔
Pending/Unfound		✔
Found		✔
Sort Order		
Ascending		✔
Descending		
Sort By		
Primary PTag		✔
PTag		
Status		
Chart		
OrgChart		
Description		
Serial #/VIN		
Custodian		
Location Code		
Location Title		
Commodity		
Equipment Mgr.		

Figure 3: Sort/Filter Items Screen

Reviewing and Verifying Items

You can review both an item and its record in the Biennial Inventory app. You should consider more than just whether the item has been found and where it is located: check whether the item's description is accurate, whether its condition is still correct, and if the custodian should be updated. To do this, review all the details of each item's record carefully and compare it to the item itself. If everything in the record is correct, you can mark it as Verified.

NOTE: The process to change or update any incorrect details or attributes for an item is shown later.

If you look for and find an item, and all its details and attributes are correct, you can use these steps to mark an item as Verified in the Biennial Inventory app.

Step	Task
1.	Log in to the Biennial Inventory app and open your list as shown in the **Installation and Setup** section.
2.	Tap an item in the inventory list to review that item's details and attributes.
3.	Look for the item in its listed location.
4.	Observe the item and compare it to its record. Review all item details and attributes carefully.
5.	If you have found the item and all its details are correct, tap the thumbs up icon, above the item's details, to mark it as Verified. OR Tap the **Search** field, then scan the item's PTag label with a scanner or the camera on your device to automatically mark it as Verified. Then skip to Step 6. **NOTE:** Only mark an item as Verified if it has been found and all its details are correct. If anything needs to be changed, or the item has not been found, **do not mark it as Verified**. These situations will be covered later.
6.	Repeat steps 2-5 as needed to review each item's details and, if correct, verify it. Remember, do not verify an item if it has not been found.
7.	Close the app or tap the **Logout** icon when you're done using the Biennial Inventory app.

Figure 4: Item Details in Inventory List

Adding Items to the Print Queue

If you find an item that is missing a PTag label, you can easily mark it as needing a label while you conduct physical inventory.

In the Biennial Inventory app, tap an item to see if it's been added to the print queue. The **Print** icon will show at the top of the item details.

NOTE: To print labels, you'll need to use the web-based version of the Biennial Inventory system. Check FA 105: Physical Inventory of Equipment (PDF) for instructions on how to print labels.

Follow these steps to add an item to the print queue. This will mark it as needing a label.

| Step	Task
1.	Log in to the Biennial Inventory app and open your list as shown in the **Installation and Setup** section.
2.	Tap an item in the inventory list.
3.	Tap the **Print** (printer) icon above the item details.
4.	Tap **Yes** in the pop-up window that asks, *Add PTag label to print queue?*
5.	Tap **OK** when the pop-up window changes to say, *PTag label added to print queue.*
6.	If you need to remove the item from the print queue, follow steps 3-5 again to remove it from the list of PTag labels to print.
7.	Close the app or tap the **Logout** icon when you're done using the Biennial Inventory app.
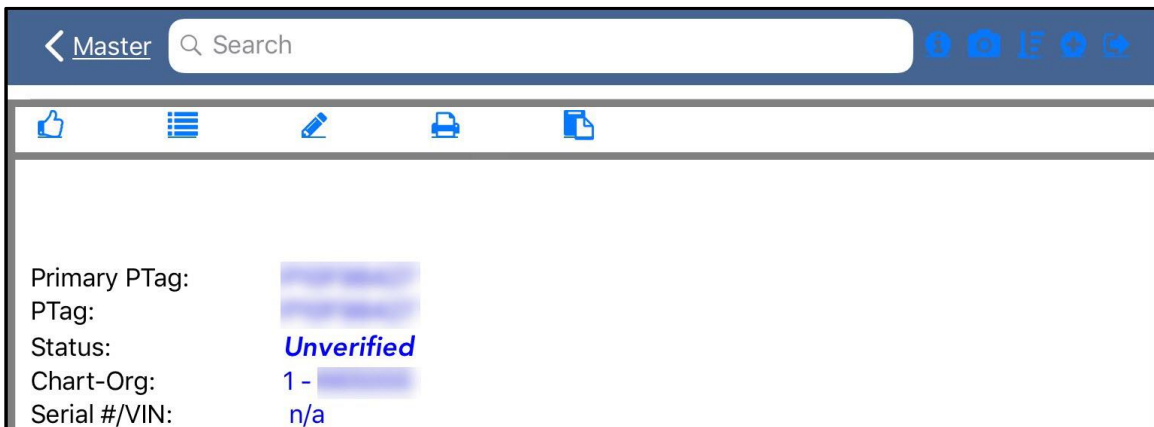
Figure 5: Inventory List

Updating Inventory Items

As you conduct physical inventory, you might find some item records with attributes that need to be updated, or items that need to have a new PTag label printed, or items that are not on your inventory list.

Updating Item Attributes

These attributes can be updated in the Biennial Inventory app:

1. Description
2. Location code
3. Custodian (UIN of the person responsible for the item)
4. Equipment Manager (can only be someone who has a UIN)
5. Condition
6. Manufacturer's name (required for items with cost of $5,000 or more)
7. Model number (required for items with cost of $5,000 or more)
8. Part Number/Vehicle Tag – such as a Vehicle Fleet number
9. Serial number or Vehicle Identification Number (required for items with cost of $5,000 or more)
10. In Service Date

    NOTE: Attributes other than the ones listed above cannot be directly updated in the Biennial Inventory app. Check FA 105: Physical Inventory of Equipment (PDF) for instructions on how to update those attributes, if needed.

Use these steps to update an item in the Biennial Inventory app and then mark it as Verified.

Step	Task
1.	Log in to the Biennial Inventory app and open your list as shown in the **Installation and Setup** section.
2.	Tap an item in the inventory list to review that item's details and attributes.
3.	Look for the item in its listed location.
4.	Observe the item and compare it to its record. Review all item details and attributes carefully.
5.	If you have found the item and one or more of its details are incorrect, tap the **Edit** (pencil) icon above the item details.
6.	On the **Edit Item** screen, tap the attribute that should be changed.
7.	Type, select, or search for the correct attribute.
8.	Repeat steps 6-7 for each attribute that needs to be updated.
9.	Select *Verified* from the drop-down menu in the **Status** field. **NOTE:** Only select *Verified* if the item has been found. If the item has not been found, **do not mark it as Verified**. This situation will be covered in later.
10.	Tap the **Save** button in the top right corner.

Step	Task
11.	In the pop-up screen, tap **OK**. The inventory list displays again.
12.	Repeat steps 2-10 as needed to update an item's attributes and, if found, verify it. Remember, do not verify an item if it has not been found.
13.	Close the app or tap the **Logout** icon when you're done using the Biennial Inventory app.

Figure 6: Location Attribute Update

Using Comments

Commenting on items in the Biennial Inventory system is a great way to ask questions and communicate about issues during physical inventory. For example, you can add a comment to an item's record saying that you found the item in an unusual spot, or you can use comments to indicate where you've looked if you can't find an item. If you need to update an item's record, you can add a comment about why the update is needed.

You can use comments in the Biennial Inventory app, using the **Memos** icon. It looks like a clipboard, and it's available from both the inventory list and from the **Edit Item** screen.

Follow these steps to add, edit, or delete comments in the Biennial Inventory app.

| Step	Task
1.	Log in to the Biennial Inventory app and open your list as shown in the **Installation and Setup** section.
2.	Tap an item in the inventory list.
3.	Tap the **Memos** (clipboard) icon above the item details to add a comment to that item.
4.	Tap **+** (in the top right corner).
5.	Type your comment in the **Add Memo** pop-up screen.
6.	Tap **Save**.
7.	Tap **OK** in the pop-up screen. Your comment displays on the **Add Memo** screen.
8.	To edit a comment, tap the comment text on the **Add Memo** screen. A pop-up screen opens with the existing text.
9.	Tap **Update**.
10.	Type your comment after the existing text.
11.	Tap **Save**.
12.	Tap **OK**. Your updated comment displays on the **Add Memo** screen.
13.	To delete a comment, tap the comment text on the **Add Memo** screen. A pop-up screen opens with the existing text.
14.	Tap **Delete**.
15.	Tap **OK** to confirm deletion.
16.	Tap the arrow in the top left corner to go back to the inventory list.
17.	Close the app or tap the **Logout** icon when you're done using the Biennial Inventory app.
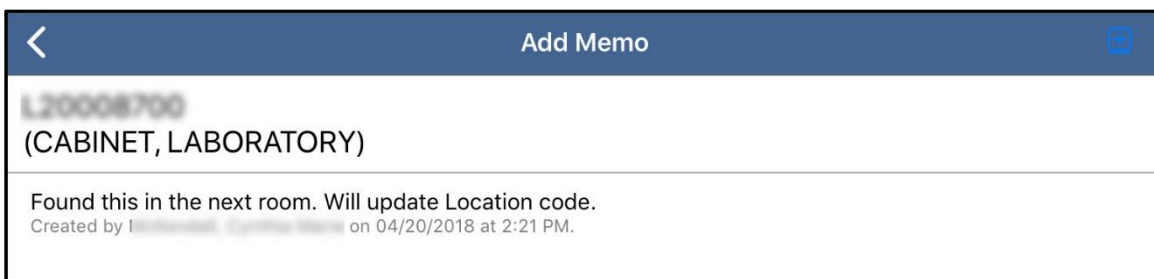
Figure 7: Example Comment

Changing Status to Pending/Unfound

An item can only be marked with Verified status if it is found. If an item cannot be found, it can be given Pending/Unfound status instead. An item with Pending/Unfound status means that the item has not yet been found, and that further research and investigation is needed or ongoing.

Use these steps to mark an item as Pending/Unfound in the Biennial Inventory app. Remember, you must follow up and resolve any items with Pending/Unfound status.

Step	Task
1.	Log in to the Biennial Inventory app and open your list as shown in the **Installation and Setup** section.
2.	Tap an item in the inventory list.
3.	Look for the item in its listed location.
4.	Tap the **Memos** (clipboard) icon to add a comment. Skip to Step 9 if you don't want to add a comment.
5.	Tap **Add Memo**.
6.	Type your comment in the pop-up screen (for example, note where you looked).
7.	Tap **Save** to save your comment.
8.	Tap the arrow in the top left corner to go back to the inventory list.
9.	Select *Pending/Unfound* from the drop-down menu at the top left of the item details. **NOTE:** Only select *Pending/Unfound* if the item has been searched for, but not found.
10.	Close the app or tap the **Logout** icon when you're done using the Biennial Inventory app.

Figure 8: Pending/Unfound Item

Adding Found Items

During physical inventory, if you find something in your unit's space that is not on your inventory list, it may be considered a found item. If you find an item that's not on your inventory list, it may or may not need to be added as a found item, depending on its label, cost, and when it was acquired.

NOTE: Check the guidelines in FA 105: Physical Inventory of Equipment (PDF) to determine if an item should be added as a found item.

Follow these steps to add, view, or edit a found item in the Biennial Inventory app.

Step	Task
1.	Log in to the Biennial Inventory app and open your list as shown in the **Installation and Setup** section.
2.	To add a found item, tap **+** (plus sign) in the top right corner. To view or edit a found item, skip to step 9. **NOTE:** If you scan a PTag for an item that's not on your inventory list, you'll see a pop-up screen asking if you want to add it as a found item. Tap *YES* to open the **Add Found Item** screen. The PTag information will automatically display in the **PTag** field.
3.	Select a Chart and Org code in the **Chart-Org** field (required), if needed.
4.	Type a description of the found item in the **Description** field (required).
5.	Add all information that you observe in these optional fields: • **PTag** • **Location** • **Custodian** • **Equipment Mgr.** • **Condition** • **Manufacturer** • **Model** • **Part #/Vehicle Tag** • **Serial #/VIN** • **In Service Date**
6.	Tap the **Save** icon in the top right corner.
7.	Tap **OK** in the pop-up screen. The inventory list displays again.
8.	To view or edit a found item, tap the item in the list.
9.	Tap the **Edit** (pencil) icon above the item's details to edit the details.
10.	Add or edit information as needed in the **Add Found Item** screen.
11.	Tap the **Save** icon in the top right corner. **NOTE:** This closes the **Add Found Item** screen and displays the inventory list again.
12.	Close the app or tap the **Logout** icon when you're done using the Biennial Inventory app.

Figure 9: Add Found Item Screen