June 3, 2020

ASSET Changes Implemented

The following changes to ASSET will be implemented on **June 4, 2020**.

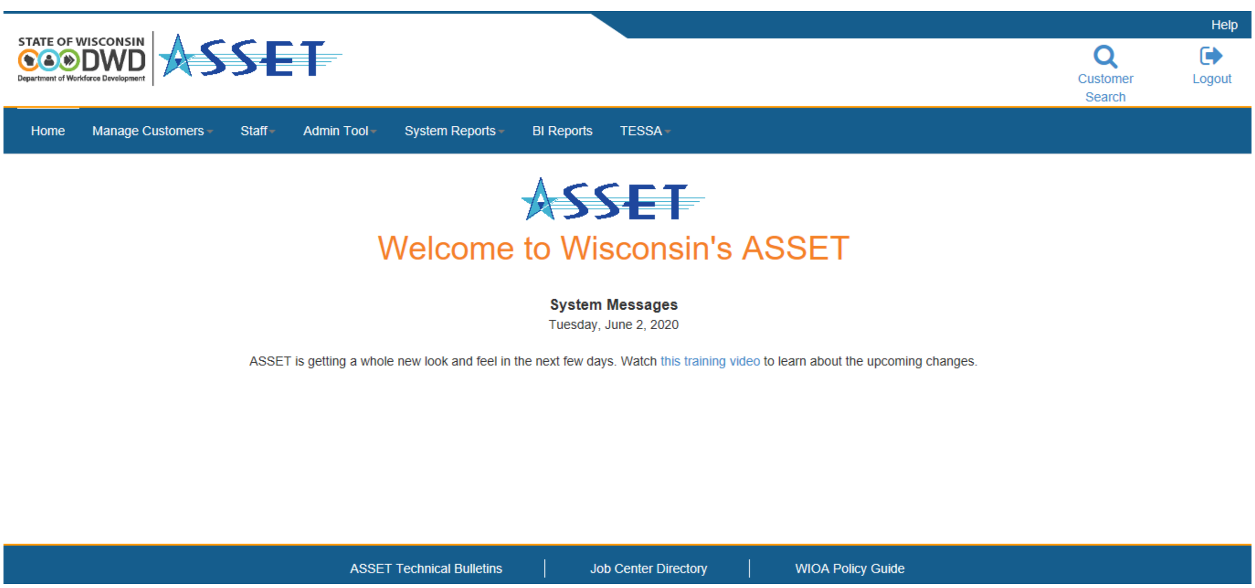
Over the past few months we a have done a major update to ASSET's layout to make it easier for users to navigate the system and work with your customers.

One of the primary objectives of this change was to separate out customer specific functions versus those that are more global. It is important to note, that this update has not changed the way career planners would interact with ASSET when entering participant information. **We have not changed the fields or layout of existing ASSET screens.**

Watch this training video to learn about the changes.

ASSET Welcome screen:

The first major change you may notice is that the left navigation menu is not visible, and will not display until you have searched for and selected a customer record to work with.



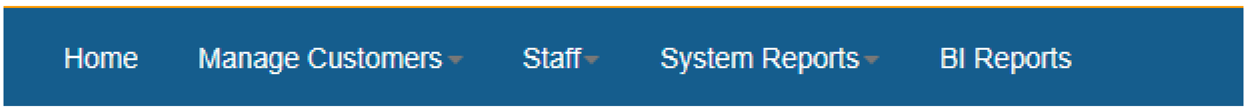
Header

- You can navigate to a new customer at any time by clicking "Search Customer" icon.
- The "Help" link at the top right of the application will take you to the ASSET System Manual.
- Log out of the application by clicking "Logout."

Footer

The footer bar contains links to the "Asset Technical Bulletins", "Job Center Directory" and the Title 1 "WIOA Policy Guide."

Horizontal Menu Bar

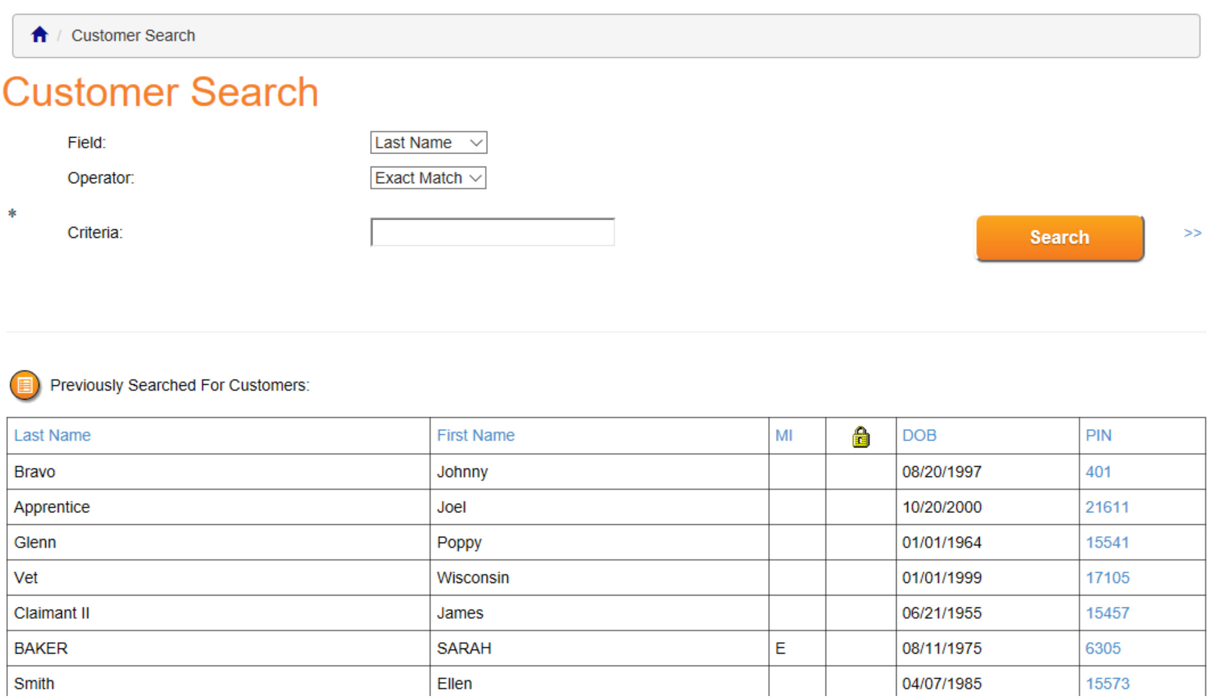


The horizontal bar is how you navigate to the non-customer specific functions of ASSET. Depending on your level of access you will see different items on the bar.

Customer Search

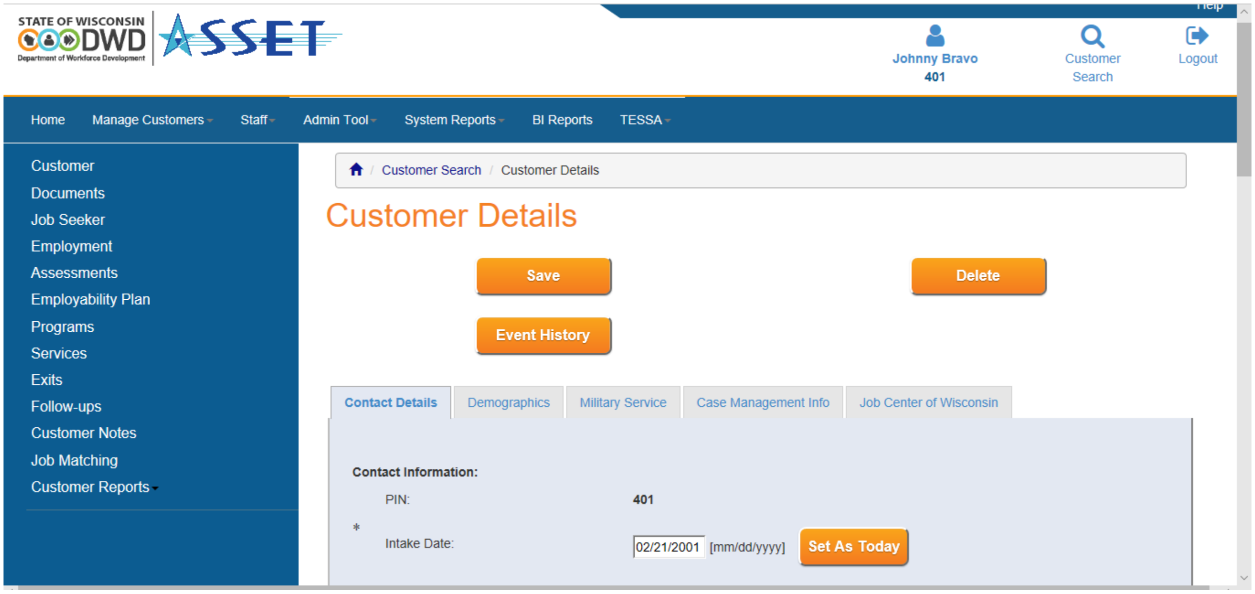
To get started with a customer's record, you first need to search for the customer. There are now two ways to search for a customer, with the "Customer Search" icon in the header, or from "Customer Search" within "Manage Customer" in the horizontal menu bar.

You will see the 10 most recently accessed customers. **There is no change to the way you search for and select customers.**



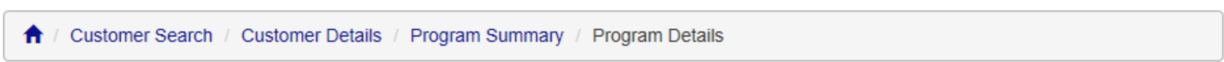
Last Name	First Name	MI		DOB	PIN
Bravo	Johnny			08/20/1997	401
Apprentice	Joel			10/20/2000	21611
Glenn	Poppy			01/01/1964	15541
Vet	Wisconsin			01/01/1999	17105
Claimant II	James			06/21/1955	15457
BAKER	SARAH	E		08/11/1975	6305
Smith	Ellen			04/07/1985	15573

Once you select a customer, the left menu will display, and customer's name and PIN will appear as an icon in the header.



You can navigate through a customer's record by clicking each of the items on the left menu. You no longer need to re-select the customer between each screen. **There is no change to the layout of screens as you navigate within a customer record.**

Breadcrumbs



We have added breadcrumbs to the top of each customer screen to aid navigation. If clicked, the breadcrumbs take user back to pages visited to get to the current screen.

Customer-specific Reports

All customer-specific reports were moved into the left menu under "Customer Reports." For example, if you want to see a summary of you customer, you would select "Customer Summary," and a summary of Case Notes can be found in "Customer Notes Summary."