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.

↑ Customer Search											
Cι	istomer Se	arch									
	Field:	Last Na	me 🗸								
	Operator:	Exact M	xact Match 🗸								
*	Criteria:						Searc	h >>			
	Search										
Previously Searched For Customers:											
Last	Name		First Name		MI	â	DOB	PIN			
Bravo		Johnny				08/20/1997	401				
Apprentice		Joel				10/20/2000	21611				
Glenn		Рорру				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.

STATE OF WISCONSIN CONTROL OF CONSINCT Department of Windfree Development			Johnny Bravo 401	Q Customer Search	Logout
Home Manage Customers - Staff-	Admin Tool - System Reports - BI Reports TESSA -				
Customer Documents Job Seeker	Customer Search / Customer Details Customer Details				
Employment Assessments Employability Plan Programs	Save		Delete		
Services Exits Follow-ups	Contact Details Demographics Military Service	Case Management Info	Job Center of Wisconsin		
Customer Notes Job Matching Customer Reports	Contact Information: PIN: 401				
	* Intake Date: 02/21/2	001 [mm/dd/yyyy] Set As	s Today		

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."

Documents						
Job Seeker	Customer Details					
Employment						
Assessments	Save					
Employability Plan						
Programs	Event History					
Services						
Exits						
Follow-ups	Contact Details Demographics	Military Service				
Customer Notes						
Job Matching	Contact Information:					
Customer Reports∫m		401				
Customer Notes Summary	FIN.	401				
Customer Summary	Intake Date:	02/21/2				
Employment History		,				
Employment Plan	Social Security Number					
TAA Financial Support Statement	Social Security Number.					
Youth Individual Service Strategy	Title:	Mr. 🗡				