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**Panasonic** CONNECT

# **CO**RE Asset Management

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Brief Walkthrough



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## Introduction

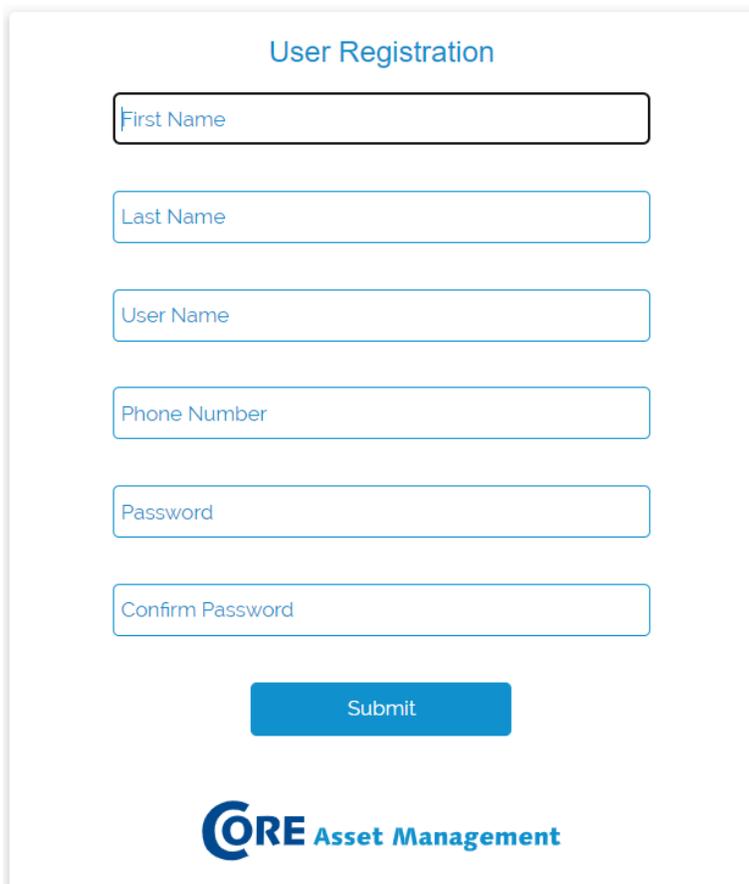
CORE is an asset management software solution provided and developed by Panasonic. This cloud-based software not only allows you to view your Panasonic TOUGHBOOK® assets, but it also has the capability of being expanded to include your non-Panasonic assets.

## Getting Started

All users will be required to complete a registration process before accessing the system. Once you are registered the system can be accessed using the following URL:

- <https://core.na.panasonic.com/>

## Registration



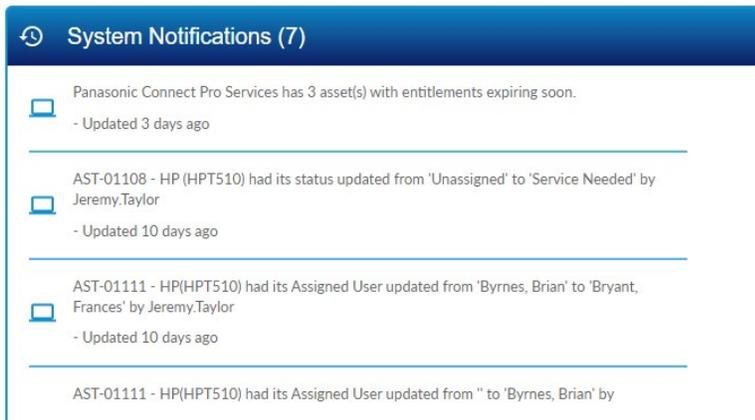
The image shows a 'User Registration' form with the following fields: First Name, Last Name, User Name, Phone Number, Password, and Confirm Password. Below the fields is a blue 'Submit' button. At the bottom of the form is the 'CORE Asset Management' logo.

New users being granted access to the system will receive an email from the application asking them to complete the registration process. This email will contain a link to a form that will allow them to enter their name (first and last name), desired username (the username must be unique), and phone number (this is not required). It will also require them to enter their initial password, once the registration is completed, provided there are no errors, they will be redirected to the login page where they can use either the username that they created or their email address to log into the application.

## Dashboard

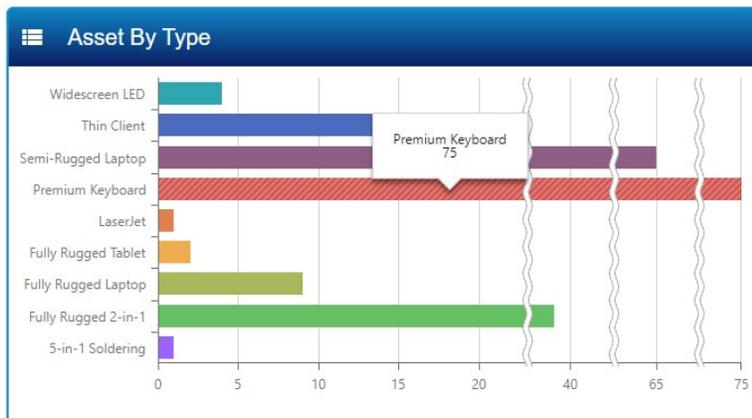
After logging into the system, you will be presented with four tiles. These four tiles give you immediate access to helpful information regarding your assets.

### System Notifications Tile



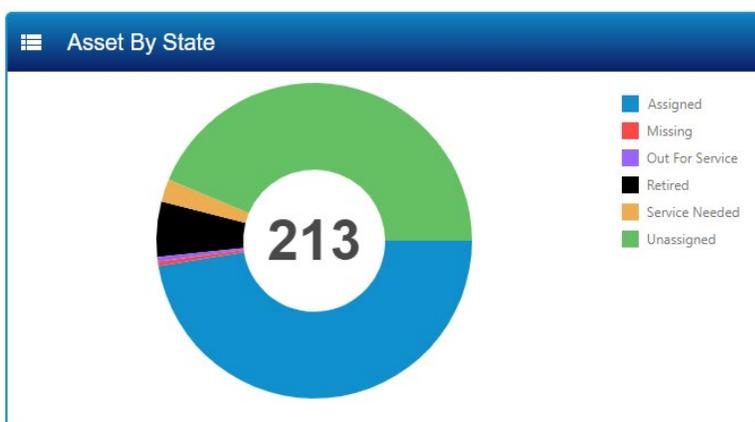
This tile is in the upper left-hand corner of the page and contains any system notifications that have been triggered and are currently unread. These notifications are created by you and can be used to inform you if there are any changes to an asset, if there is a low stock of any consumable items, or if a warranty/entitlement is about to expire.

### Asset by Type Tile



This tile is in the upper right-hand corner of the page and contains the total number of assets in the system grouped by the "Type" value. The "Type" value is indicated by the users for any non-TOUGHBOOK asset. All TOUGHBOOK assets will automatically have a "Type" value classification provided.

### Asset by State Tile



This tile is in the lower left-hand corner of the page and contains the total number of assets in the system grouped by their current "State" or status. The "State" value of each asset can be manually set by a user with the appropriate access. There are certain situations where the value will be automatically updated by the system (ex: changing to "Retired" when disposing of the asset).

### Asset by Manufacturer Tile



This tile is in the lower right-hand corner of the page and contains the total number of assets in the system grouped by the “Manufacturer” value. The “Manufacturer” value is indicated by the users for any non-TOUGHBOOK asset. All TOUGHBOOK assets will automatically have a “Manufacturer” value provided.

### Assets

The assets menu item will give you a complete list of all assets that are associated with the organization or organizations that you have access to view and manage. A user can be granted access to multiple organizations if the need arises. By default, all Panasonic TOUGHBOOK assets with the appropriate entitlement will automatically be available. This includes a description of the model, an image, all warranties/entitlements, and any previous service history.

### Asset Grid

- Dashboard
- Assets
- Consumables
- Repair
- Reports
- Acquisitions
- Disposals
- Settings
- Notifications

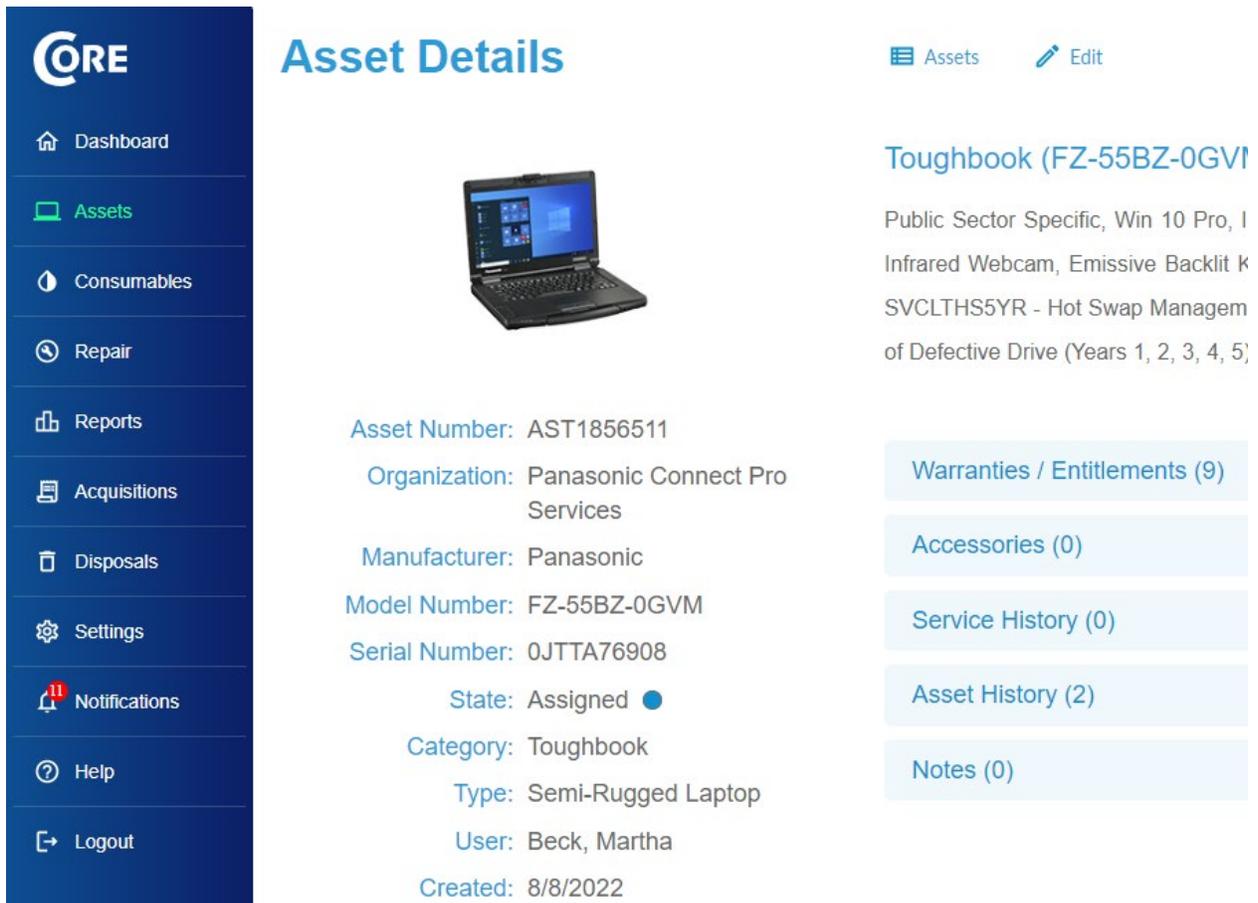
## Assets

+ Add Asset
↑ Import
Export ▾

Photo	Asset Number	Model Number	Serial Number	State	Organization
	AST1731533	CF-VEK201LM	7HKUA45534	● Unassigned	Panasonic Connect Pro Servic
	AST1731534	CF-VEK201LM	7HKUA45535	● Unassigned	Panasonic Connect Pro Servic
	AST1792724	CF-ALEPEMA8	0FKKC01263	● Assigned	Panasonic Connect Pro Servic
	AST1792725	CF-ALEPEMA8	0FKKC01264	● Assigned	Panasonic Connect Pro Servic
	AST1826423	FZ-55BZ-0GVM	0GTTA50712	● Assigned	Panasonic Connect Pro Servic
	AST1843593	FZ-55BZ-0GVM	0JTTA76907	● Assigned	Panasonic Connect Pro Servic
	AST1856506	FZ-55BZ-0GVM	0JTTA76900	● Assigned	Panasonic Connect Pro Servic
	AST1856508	FZ-55BZ-0GVM	0JTTA76902	● Assigned	Panasonic Connect Pro Servic
	AST1856509	FZ-55BZ-0GVM	0JTTA76905	● Assigned	Panasonic Connect Pro Servic
	AST1856510	FZ-55BZ-0GVM	0JTTA76906	● Assigned	Panasonic Connect Pro Servic

The grid containing the assets will allow you to filter or sort utilizing the column headers. You can even move the headers around to fit by selecting a column header and dragging it to your desired location. All changes (sorting, filtering, column organizing) will remain in place if you continue to access the system from the same device. These changes will also be present if you export the grid data.

## Asset Details



The screenshot shows the CORE Asset Details page. On the left is a dark blue sidebar with the CORE logo and navigation links: Dashboard, Assets (highlighted), Consumables, Repair, Reports, Acquisitions, Disposals, Settings, Notifications (with a red '11' badge), Help, and Logout. The main content area has a white background with the title 'Asset Details' and a 'Toughbook (FZ-55BZ-0GVM)' header. Below the title is an image of a black Toughbook laptop. To the right of the image are 'Assets' and 'Edit' icons. The asset details are listed in a light blue box: Asset Number: AST1856511, Organization: Panasonic Connect Pro Services, Manufacturer: Panasonic, Model Number: FZ-55BZ-0GVM, Serial Number: 0JTTA76908, State: Assigned (with a blue dot), Category: Toughbook, Type: Semi-Rugged Laptop, User: Beck, Martha, and Created: 8/8/2022. On the right side, there are several light blue collapsible panels: Warranties / Entitlements (9), Accessories (0), Service History (0), Asset History (2), and Notes (0). The asset description below the title reads: 'Public Sector Specific, Win 10 Pro, I Infrared Webcam, Emissive Backlit K SVCLTHS5YR - Hot Swap Managemen of Defective Drive (Years 1, 2, 3, 4, 5)'.

By selecting an asset within the grid, you will be redirected to a page containing multiple data points related to the asset. Located on the left side is a list of fields containing key information, this list can contain both default and custom fields. These additional or custom fields are created within the Settings menu (see Settings).

The page also contains other important information located on the right side contained within collapsible panels. The following is a list of each panel and the data that it contains:

- **Warranties/Entitlements:** This contains a list of any warranties/entitlements that have been added to the application. For your Panasonic TOUGHBOOK assets, this data will be provided automatically.
- **Accessories:** This is a list of relationships between this asset and another asset or a consumable item that is specified by you or another user.
- **Service History:** This contains a list of all the service tickets for this specific asset. This will only contain information from Panasonic Connect Professional Services, so data will only be present for TOUGHBOOK assets.
- **Asset History:** This is a list of any changes made to this asset within the system.
- **Notes:** This is a list of comments/notes entered by a user related to this specific asset.

### Add Asset



The system allows you to not only track your Panasonic TOUGHBOOK assets but any other assets as well regardless

of the manufacturer. Your ability to do this is limited by your organization’s subscription and data cap. There are multiple ways to add non-Panasonic assets to the system. One of them is the “Add Asset” button located above the Assets grid. This button will redirect you to a new page that can be used to create a single asset.

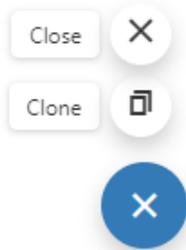
### Import Asset



There are times when you may want to create multiple assets at once. To facilitate this the system has an import

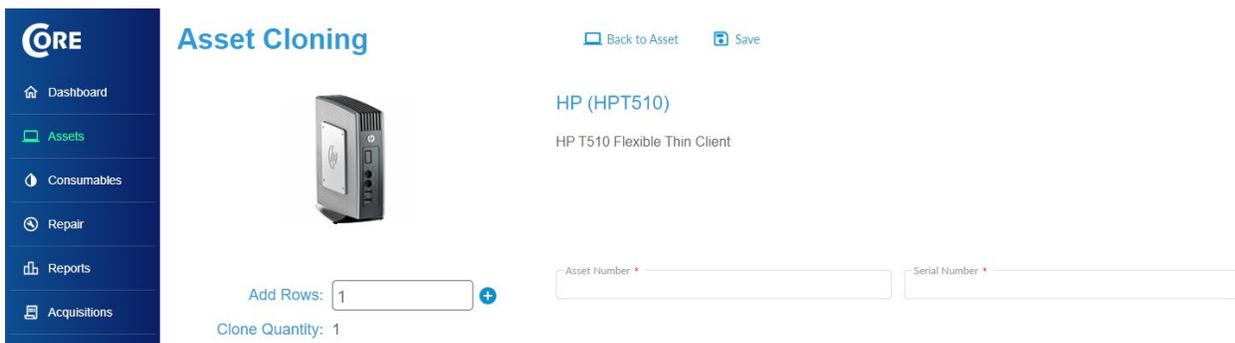
process. Located next to the “Add Asset” button above the Assets grid is the “Import” button. This button opens a popup that contains a downloadable template. Once your data has been inputted into the appropriate column on the template it can be uploaded into the system to create the assets. The template will contain a list of default columns and any custom fields that were created for the specified organization.

### Asset Cloning



When viewing the details of an asset you will notice a button located in the bottom right-hand corner. This button contains different options depending on the selected asset. If you are in a non-Panasonic asset it will contain an option of “Clone”.

Pressing the “Clone” button will redirect you to a new page that can be used to create additional assets in the system based on the asset that you selected. You can even specify which values you want to be duplicated to the newly created asset, such as the state, location, user, warranties/entitlements, and/or any notes.



By default, the page is set up to create one additional asset, but you can increase the number using the “Add Rows” option. Once the desired number of rows have been created, you just need to enter the required unique information (asset and serial number) and then press the “Save” button to create the assets.

## Consumables

Consumables is an inventory management system that has been added to the application and allows you to store and track any items that you do not wish to store as an asset. Your ability to create items may be limited to your organization’s subscription and data cap.

### Consumable Grid



<input type="checkbox"/>	Photo	Name	Manufacturer	Identifier	Location
<input type="checkbox"/>		Dual Monitor Stand	ErGear	EGCM1	SR-117-
<input type="checkbox"/>		Jabra Evolve 40	Jabra	Evolve 40	SR-J01-
<input type="checkbox"/>		Standard Mouse Pad	Belkin	F8E089-BLK	SR-117-
<input type="checkbox"/>		Logitech K120	Logitech	K120	SR-117-

Just like the Assets grid you can filter or sort utilizing the column headers. You can even move the headers around to fit by selecting a column header and dragging it to your desired location. All changes (sorting, filtering, column organizing) will remain in place if you continue to access the system from the same device. These changes will also be present if you export the grid data.

Located above the grid are the options to add or remove a consumable item. By pressing the “Add Consumable” button a popup will appear that can be utilized to create a new consumable entry. You can only use the “Remove Consumable” after checking the box located at the beginning of each row. If the item is associated with an asset, it cannot be removed.

Consumable Details

By selecting a consumable item within the grid, you will be redirected to a page containing multiple data points related to the item. Located on the left side is a list of fields containing key information, this list can contain both default and custom fields. These additional or custom fields are created within the Settings menu (see Settings). One of the default fields provided is the “Reorder Level”, which is used to trigger a system notification informing anyone that has subscribed to receive a notification when there is low stock. The notification is triggered when the available quantity reaches the quantity indicated in the “Reorder Level”.

## Repairs

**Repair**

Asset Number: AST1826423  
 Organization: Panasonic Connect Pro Services  
 Model Number: FZ-55BZ-0GVM  
 Serial Number: OGTTA50712  
 State: Assigned  
 Manufacturer: Panasonic  
 Type: Semi-Rugged Laptop  
 User: Hartman, Emma

**Unit Information**

- \* Model Number: FZ-55BZ-0GVM
- \* Serial Number: OGTTA50712

**Contact Information**

- \* Contact Name: Jeremy Taylor
- \* Phone Number: 9136858855
- \* Email Address: JTaylor@Heartlands.com

**Customer Information**

- \* Billing Customer: Panasonic Connect Pro Services
- \* Shipping Customer: Panasonic Connect Pro Services
- \* Shipping Address: 14206 Overbrook Rd , Leawood, KS, US, 66224
- Box Address:

**Problem**

- \* Category:
- \* Description:

**Comment**

Box Required Create

The application also gives you the ability to create service tickets for your Panasonic TOUGHBOOK assets. It utilized a direct link to Panasonic Connect Professional Services to create the service ticket and once created will automatically update the state of your asset to “Out for Service”.

## Acquisitions

Acquisitions is a process added to the application that allows you to create an order to track the purchase of your assets and then receive against the order once it has been approved to create assets. This process can only be used to create non-Panasonic assets and may be limited to your organization’s subscription and data cap.

**Acquisitions** + Add Acquisition - Remove Acquisition Export

<input type="checkbox"/>	OrderNumber	Organization	State	PO Number
<input type="checkbox"/>	ACQ-00002	Panasonic Connect Pro Services	Pending	
<input type="checkbox"/>	ACQ-00003	Panasonic Connect Pro Services	Pending	
<input type="checkbox"/>	ACQ-00004	Panasonic Connect Pro Services	Pending	
<input type="checkbox"/>	ACQ-00005	Panasonic Connect Pro Services	Pending	

25 50 100

## Disposals

Disposals are used as a process to indicate the end of life for an organization’s assets. You can create a disposal order containing one or more assets, which can be processed once it has been approved. After processing the disposal, the assets indicated in the order will be changed to a “Retired” state. Any retired asset will only remain visible in the Assets grid for a limited time but can still be viewed using the link provided in the disposal order.

<input type="checkbox"/>	Order Number	Organization	State
<input type="checkbox"/>	DIS-00003	Panasonic Connect Pro Services	Processed
<input type="checkbox"/>	DIS-00004	Panasonic Connect Pro Services	Processed
<input type="checkbox"/>	DIS-00005	Panasonic Connect Pro Services	Processed
<input type="checkbox"/>	DIS-00006	Panasonic Connect Pro Services	Processed
<input type="checkbox"/>	DIS-00007	Panasonic Connect Pro Services	Processed

## Settings

Settings will allow you to create new users, create roles, assign permissions, and create custom fields.

### Account

**Settings**

Account Roles Users Divisions Models & Manufacturers Organization

**Contact Information**

First Name:

Last Name:

Phone Number:

Email Address:

**Update Password**

Current Password \*

New Password \*

Confirm Password \*

All users will have the ability to update their account information and to change their password from within the “Account” section of the settings.

## Roles

		Role Name	Members	Description
-	✎	Default Admin Role	2	The Default Admin Role al
-	✎	Default Read Only Role	0	Users assigned the Defaul
-	✎	Default User Role	1	The Default User Role allc

Roles can be created, and permissions indicated for each role. The system provides three roles by default which can be assigned to users, but if you have the appropriate permissions, you can create new roles.

Permission	View	Insert	Update	Delete
Acquisitions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Can Approve Decline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can Cancel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can Complete	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can Receive	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Charges	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Funding	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
History	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Media	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pending	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Received	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Shipments	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

By selecting the role within the grid, you will be redirected to a page containing multiple permissions that can be set based on your needs.

## Users

The Users section in settings will give you the ability to create new users, delete a user, or reset a user's password if you have the appropriate permissions.

[+ Add](#)

 Last Login	 Password Expires	 Suspended Until	
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To create a new user, you just press the “Add” button located above the Users grid on the right. Pressing this button will cause a popup to appear that can be used to indicate their role and enter their email address. The system will send them an email containing a link that they will use to complete the registration.



- [Dashboard](#)
- [Assets](#)
- [Consumables](#)

## Settings

- [Account](#)
- [Roles](#)
- [Users](#)
- [Divisions](#)
- [Models & Manufacturers](#)
- [Organization](#)

		User Status 	First Name 	Second Name 
		Active	Jeremy	Taylor

To delete a user, you can just press the red minus button located at the beginning of the row containing the user that you want to remove. Next to the delete button is a button that can be utilized to reset that user’s password.

### Organization

The Organization section of the settings allows you to create custom fields for your assets, consumables, acquisitions, and disposals. Located at the bottom of this section is a grid containing any custom fields that have been set up.

[+ Add](#)

 List Values	 Required	
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To create a new custom field, you just press the “Add” button located above the Custom Field grid on the right.

### Add Custom Field

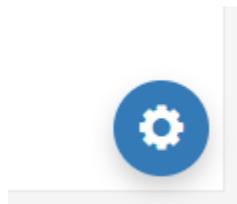
Context * Select...	Field Name * 
Field Type * Select...	Default Value 
<input type="checkbox"/> Required	Max Length 

**Add** **Cancel**

By pressing this button, a popup will appear containing the different options that can be utilized to create your desired custom field.

## Notifications

Notifications can be created and viewed from within the Notifications page. To navigate to this page, you can select the Notifications menu item or if you want to view a specific notification in the System Notification tile on the Dashboard you can select that notification and you will be redirected to the Notifications menu item with notification preselected.



To subscribe to new notifications or to remove any current ones you just press the gear icon that is in the lower right-hand corner of the Notifications page. Pressing the button will cause a slide-out panel to appear from the right side of the screen. This panel will contain a list of all the notifications that you are currently subscribed to

## Notification Settings

Asset Field Change

Receive Email



Located at the top right-hand corner of the slide-out is a plus sign that can be used to subscribe to new notifications. Pressing this button will change the data present in the panel to show any notifications that you are not currently subscribed to or any notifications that have parameters that you can set.

## Help

 **Support Line**

Phone: (877) 207-0092

For any additional help or information, the system contains a list of frequently asked questions (FAQs) as well as a method to submit a request for assistance via email or by using the provided support line. These options are in the Help menu item of the application.