

Asset Details

The *Asset Details* area allows you to view and manage all relevant information about a specific asset:

Fire Extinguisher 23	Fire Extinguisher	Delta Campus
Asset Name	Class	Site
Asset Details	Jobs (1)	Planned Schedules (1)
	Documents	Forms
	Asset Attributes	Stock Levels
		Asset Stocks

The *Asset Details* view can be accessed by clicking on the asset name in the *Assets* list.

1. The **Asset Details** tab allows you to view and manage the basic asset information such as the description. class, asset / model / serial number. site / location, dimensions, install date, initial cost, current value, maintenance costs and warranty details, status, and QR codes.

Boiler 1	Boilers	Head Office - r1	Location
Asset Name	Class	Site	
Asset Details	Jobs (9)	Planned Schedules (3)	Documents (1)
	Forms (7)	Asset Attributes	Stock Levels
		Asset Stocks	

DescriptionBoiler 1

ClassBoilers

Sub Class

Asset Number1

Model Number

Serial Number222

Manufacturer

Parent Asset-

Comments

Contract

Site NameHead Office - r1

Location

Sub Location

TeamNot Selected

Capacity / Rating

Height

Width

Depth

Criticality

Dropdown 2

Dropdown 3

RICS NRM3 Code

Install Date13/01/2016

Asset Age (Years)5.80

Life Expectancy

Warranty Expiry Date14/01/2016

Purchase Cost234.00

Current Value0.00

Replacement Cost0.00

Maintenance Cost0.00

Contract Details

ResourceElectrical Ltd -

Reference88w

Service / Category

Start Date

End Date

Status

Since start2,116.5 days

In Service2,116.5 days100.0 %

Out of Service0.0 days0.0 %

In Fault0.0 days0.0 %

QR Code34fgdfg

Last Scan

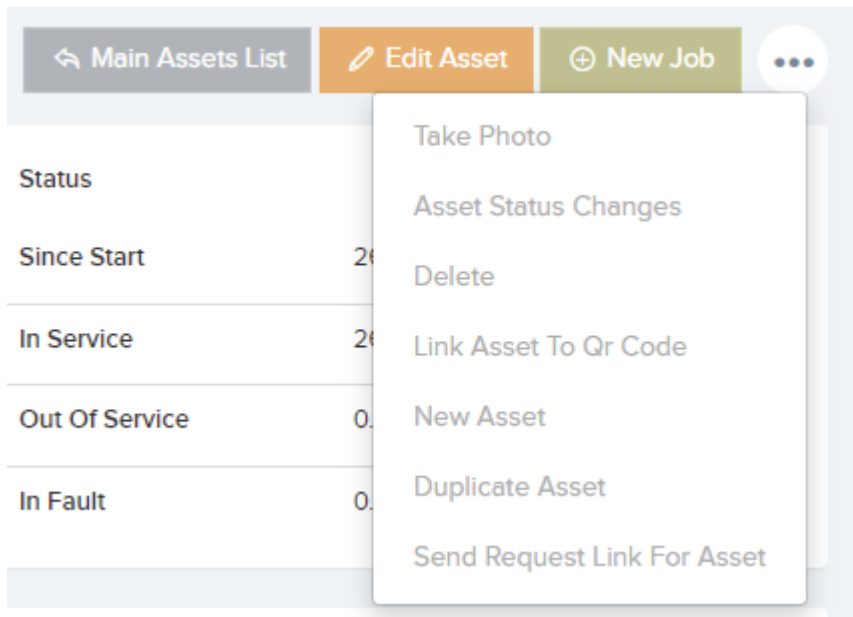
By

Asset Attribute FormNot Selected

You can capture additional information about this asset by associating it to an Asset Attribute Form set up in the asset attributes area.

From this tab you can edit these details and raise a new job

for this asset. There are also additional options available from the ... drop-down:



- **Take Photo** – This allows you to add a photo to this asset
- **Asset Status Changes** – This will display a pop-up window showing all status changes for this asset (e.g. excellent condition, good condition, worn, faulty etc)
- **Delete** – This will delete the asset
- **Link Asset to QR Code** – This will allow you to link this asset to an existing QR code. Selecting this option will display a prompt to allow the application's QR scanner to scan the existing QR code you would like to associate with this asset.
- **New Asset** – This will take you to the *Create Asset* page where you can create a new asset.
- **Duplicate Asset** – The Duplicate button will bring up the new asset screen with all fields prepopulated except for the asset number as this needs to be unique.
- **Send Request Link For Asset** – This option will show if the setting '**Ask For Single Asset**' is set to YES.

(Settings→Job Requests→New Request Screen Settings)
Here you can create a link to be sent to a staff member, site manager, tenant or resident to the Request App.

Note: Assets can also be loaded in from a spreadsheet using the *Upload Centre*, but we recommend creating the assets through the interface for a small number of assets.

2. The Jobs tab allows you to view and manage all jobs associated with this asset. The jobs list can be sorted by selecting any of the column headings. You can also select the job number to go to the *Job Details* page, or the arrow icon to go to the planned schedules area:

3. The Planned Schedules tab allows you to view and manage all planned schedules associated with this asset.

The Planned Schedules tab in the Asset Details area shows any planned schedules that have been set up for a specific asset:



This tab has a grid listing all planned schedules for this asset, and the relevant information such as the compliance type, assigned user / resource, schedule frequency, next job, and last completed job for this schedule.

You can add this asset to an existing schedule, or create a new schedule for this asset from this tab by selecting the *Add Schedule* button:



You can also generate jobs for the schedules listed on this page, and export the planned schedules list for this asset to an Excel sheet by clicking on the three dots and selecting from the drop-down:



4. The Documents tab allows you to view and manage all documents associated with this asset. The documents list can be sorted by selecting any of the column headings.

You can upload a new document for this asset by selecting the *Upload* button. The *Filters* button will allow you to filter the list by document tags. If you click on the three dots, the drop-down will show an option to view archived documents associated with this asset:



5. The Forms tab allows you to view and manage all forms associated with this asset. The forms list can be sorted by selecting any of the column headings.

The list can be exported to an Excel sheet as shown below. You can also associate a new form with this asset by clicking on the *Add Form* button:



This will display a pop-up window showing a selection of forms to choose from:

Select Form ×

	Form Name ▼	Category ▼	Type ▼
<div>SELECT</div>	A - Resource Can Add Form		Preventative
<div>SELECT</div>	Broadside Fire Extinguisher Checks		Inspection
<div>SELECT</div>	Dante Test Long Form		Preventative
<div>SELECT</div>	Document Test		Preventative
<div>SELECT</div>	Elevator Inspection		Inspection

6. The Asset Attributes tab allows you to view and manage attributes that have been assigned to this asset. Asset attributes are forms / collection of questions that can be set up and then allocated to assets in order to capture additional information. You can set up as many of these asset attribute forms as you like to cover different kinds of assets.

Asset attributes can be set up in the *Assets -> Asset Attributes* area.

7. The Stock Levels tab allows you to view and manage the stock / stock levels held in this asset. The stock list can be sorted by selecting any of the column headings.

You can add stock levels to this asset by selecting the *Add Stock Level* button:



This will display a pop-up window showing a list of stock items for you to choose from:

Choose Stock				
	Stock Name ↑	Stock Code	Stock category	Cost
Select	Lift Chain	lc01		200.00
Select	Lift Control Panel	lc01		500.00
Select	Light Bulbs	lb23		15.00
Select	Part 1	p1		0.00
Select	Widget	w1		10.00

10 Items per page
 1 - 5 of 5 items

Select the stock to add. Once added you can then adjust the stock level.
 [Help](#)

You can also export the stock levels list to an Excel sheet, or view the stock audit trail for this particular asset by clicking on the three dots to the top-right of the grid, and choosing from these options:



8. The Asset Stocks tab allows you to view and add stock to that asset. Select the Stock line needed and a pop up will appear where you can select Quantity Required, Quantity In Use, Add Comments, click if Spare is required, Quantity Required in Stock and assign a Default Storage area. This can be edited at any time also.

Edit Asset Stock

Stock Name

Lift Chain

Quantity Required

1

Quantity In Use

1

Comments

Is Spare Required

☒

Quantity Required In Stock

2

Default Storage Area

BIn 25

⊗ Cancel

▶ Confirm

9. The Child Assets tab allows you to view and keep track of all Child Assets associated to one Parent Asset.

When creating a new Asset or Editing an existing asset you can set a Parent Asset.

Boiler 1		Boiler1		Boilers		Biarritz		Floor 11	
Asset Name		Asset Code		Class		Site		Location	
Asset Details		Jobs (1)		Planned Schedules		Documents		Forms	
Asset Details		Asset Attributes		Stock Levels		Asset Stocks		Child Assets (0)	

Description Boiler 1		Site Name Biarritz		Install Date	
Asset Class Boilers		Location Floor 11		Asset Age (Years)	
Asset Sub Class		SubLocation Room 1		Life Expectancy	
Asset Number Boiler1		Team Not Selected		Warranty Expiry Date	
Model Number		Capacity / Rating		Purchase Cost 0.00	
Serial No.		Height		Current Value 0.00	
Manufacturer		Width		Replacement Cost 0.00	
Comments		Depth		Maintenance Cost	
Priority		Dropdown 1		Contract Details	
Parent Asset -		Dropdown 2		Resource	
Number of child assets 0		Dropdown 3		Reference	
				Serial / Category	

Form restriction – Here the user can restrict what forms are available. This means that when a user adds a form to the Site, Location or asset, the end-user, either on the main application or the mobile apps will only be able to select the templates that you have selected.

Restrict Forms	Yes
Restricted Form Templates	
Form Name	
Cleaning Form	
<p>Here you can restrict which forms can be added by a user in the main application or in the apps</p>	