

Assets Overview

The *Assets* area is where you can create / upload and manage all your assets.



The *Assets* list displays all your assets. The *Assets* list can be filtered by selecting the *Filers* button. You can also sort the grid by selecting any of the column headings, or refine the grid further by choosing which columns you wish to display. This can be done by selecting the three dots next to the *Asset* column heading.

You can create a new asset from this view by selecting the *New Asset* button at the top-right of the page:

This will take you to the *Create Asset* page with various fields for you to populate with the relevant asset information. Each asset must belong to an asset class and a site, and / or a location within that site. Each asset must also have a unique asset code / number:

The screenshot displays a comprehensive form for creating a new asset, organized into several sections:

- General Information:** Includes fields for Description, Class (dropdown), Sub Class (dropdown), Asset Number, Model Number, Serial Number, Manufacturer, Parent Asset (with a 'Choose Parent' button), and a Comments text area.
- Location and Context:** Features dropdown menus for Contract, Site, Location, Sub Location, and Team.
- Physical Attributes:** Contains input fields for Capacity / Rating, Height, Width, and Depth.
- Financials:** Includes fields for Purchase Cost, Current Value, Replacement Cost (pre-filled with 0), and Maintenance Cost.
- Contract Details:** A section with a Resource dropdown, Reference, Service / Category, Start Date, End Date, and Cost fields.
- Additional Fields:** Includes Install Date, Life Expectancy, Warranty Expiry Date, Status (dropdown), QR Code, and Asset Attribute Form (dropdown).
- Advanced Options:** Features three additional dropdown menus (labeled Dropdown 2 and Dropdown 3) and a RICS NRM3 Code field.

A yellow callout box on the right side of the form provides instructions: "You can capture additional information about this asset in addition to the fields here. If you have set up an Asset Attribute Form in the Asset Attributes area. Select the asset attribute form in the dropdown above. Then once this new asset is saved, you can click on the Asset Attributes tab and complete the additional information."

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.

When the relevant fields have been completed, click save to create your new asset. You will then be taken to the *Asset Details* page. From here you can view and manage all information related to a specific asset.

Jobs can be set up for assets from *Asset Details* tab. Click on the *New Job* button on the right-hand side of the page:



This will take you to the *Create a New Job* view where you can populate the new job information.

Planned Schedules can also be set up for assets. The *Planned Schedules* tab in the *Asset Details* area shows any planned schedules that have been set up for a specific asset:



There are numerous fields available to capture information about an asset including 3 free text fields and 3 dropdown fields that can be populated in the settings area. All field names can be changed via the 'Custom Field Names/Labels' section in the settings area.