Viewing/Editing an Asset Introduction

🛗 Wed, Jan 17, 2024 🛛 🖿 Viewing/Editing an Asset

It's possible that information concerning Assets may need to be viewed or even edited at some point and this can be done simply by clicking the "Asset Search" button.

1. Once clicked, the Asset Search screen appears. This is where the details of the search are specified to make sure the correct Asset(s) is found. The only field information that is mandatory is the Client but by entering the other details, a more precise search can be conducted. The Buildings, Building Format, Equipment Types and Manufacturers fields are all separate menus where one or more items can be ticked and the Status field is where it is possible to view Assets by their status (see below). It is also possible to bring back a list of Assets using Warranty, whether they are managed or not and whether they are operational or not. It is also possible to search by a specific Asset Number. Once the required details have been entered, click "OK" to perform the search.

Note: If a building is no longer managed any assets for that building will not be returned unless the "Not Managed" box at the bottom of the Asset Search screen is ticked (i.e if the user requires to see all assets including assets for not managed buildings then this box will need to be ticked, if the user is not interested in seeing any assets at building that are no longer managed then leaving the box unticked will not show them in the list).

Asset Search	
Clients	Currently 1 client selected
Buildings	Click here to make a selection
Building Formats	Click here to make a selection
Equipment Types	Click here to make a selection
Status	 Decommissioned In Service In Storage Isolated Out of Service Scrapped
Manufacturers	Click here to make a selection
Warranty	All
Asset Number	
Not Managed	
Operational	•
	OK Cancel

2. A list of all the Assets, as defined by the search criteria, appears. To view an Asset, double click an item in the list or select an item and click the "Next" button.

3. When viewing an Asset, it is possible to see and edit all the information that was added to the Asset during the creation process. It's also possible to view the history of the selected Asset by going to the "History" tab. In this tab, Users can view three types of history relating to the Asset:

• Location History provides an audit trail of any changes in location, whether that is an area within the Building in which the asset is currently associated or to an alternative Building.

ect history	to view					Location Histo	ny Associated Work Ord	ler Status Changes	;
ion	Change Date	Change User	Building	Block	Level	Area	Location	Location Extra	٦
ated	23/04/2018 - 13:11	Catering	Red Building	Main Building	Ground Floor	Common Areas	Restaurant		
							(Close Sav	sve

 \cdot Associated Work Order History rovides an audit trail of all work orders created which has the asset associated. This shows details of dates, costs & type of fault.

Select history to vie	2W					Loca	ation History Asso	ociated Work Order	Status Changes	Asse
Work Order Nº	Resource Nan	ne		Scheduled Start Date	Scheduled End Date	Reason Type	Type Of Work	Symptom	Total Cost	et Det
3038107	Catering			09/01/2020 16:29		Wear and Tear/Bre	Reactive	Burnt Out	£0.00	ails
3050386	Catering			02/12/2019 13:55		Wear and Tear/Bre	Reactive	Burnt Out	£67.00	Ę
										arranty
										History
										System
										FGas
										Meter
										Availability
Summary Informati	ion - showing	2 of 2						Advanced	Filter Clear Filter	
Original Purc	chase Cost	£0	Work Order Total Cost	£67.00	% Purchase Cost	100 %				
Replace	ment Cost	£0	Filtered Work Order Cost	£67.00	Filtered % Purchase	100 %				
								Clo	ose Sav	e

The User is able to filter this list using the "Advanced Filter" option. This provides the option to filter by Start and End Date, Type Of Work Order, Resource and Currency. Clicking "OK" will apply this and filter down the view.

Filter	
Scheduled Start Date	
Scheduled End Date	
Type Of Work Order	Reactive
Resource	First In Service (Catering)
Currency	Great British Pounds
	OK Cancel

 \cdot Status Change History provides an audit trail of any changes in status which the asset has experienced. For example if the asset was moved from in service to out of service.

Select history to view				Location History	Associated Work Order	Status Changes	Asse
Date	User Name	Status	Change Reason				Det
23/04/2018 - 13:11	Catering	In Service	New				ails
							Warranty
							History
							System
							FGas
							Meter
							Availability
L					Clos	se Sav	l

4. Once any changes have been made, click "Save" to apply them. If the Asset was only being viewed, click "Close".

Viewing a Manufacturer

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