Creating Assets

💾 Fri, Jan 19, 2024 🛛 🖿 Assets Tab

The Portal provides Users with the ability to create Assets that are located at site or elsewhere. These Assets can be created through the Assets tab using the Create Asset function. The following details how to create an Asset:

1. Clicking the "Assets" tab will display the Assets page along with the Search Assets pop up. Click "Cancel" to close this screen and click "Create Asset..." to display the Create Asset pop up.

Actions «	Filters Building: (000	06) Tower Bridge Demo										
List Assets Create Asset	Assets <u>Refresh</u> Search Search											
	Total: 32					1	2 3				Show 10,	15 , 25 , 50 , 75 , 100 per page
	Asset Number			Building Name	Equipment Type	Sub Equipment Type						Manufacturer
	Auto Doors - Fictive Asset 000019	Physical	Auto Doors - Fictive Asset 000019	(00006) Tower Bridge Demo	Automatic Sliding Door		Ground Floor	Customer Facing	Entrance		In Service	Unknown
	Refrigeration - Fictive Chilled REFR2	Physical	Refrigeration - Fictive Chilled REFR2	(00006) Tower Bridge Demo	Chilled Multideck Cabinet		Ground Floor	Customer Facing	Entrance		In Service	Unknown
	Refrigeration - Fictive Drinks REFR2	Physical	Refrigeration - Fictive Drinks REFR2	(00006) Tower Bridge Demo	Chilled Multideck Cabinet		Ground Floor	Customer Facing	Entrance		In Service	Unknown
	Kitchen Ductwork - Fictive Asset 013155	Physical	Kitchen Ductwork - Fictive Asset 013155	(00006) Tower Bridge Demo	Duct Work		Ground Floor	Back Of House	Training Room		In Service	Unknown
	Emergency Lighting - Fictive Asset 009459	Physical	Emergency Lighting - Fictive Asset 009459	(00006) Tower Bridge Demo	Emergency Lighting		Ground Floor	Back Of House	Offices		In Service	Unknown
	Escalator - Fictive Asset 005504	Physical	Escalator - Fictive Asset 005504	(00006) Tower Bridge Demo	Escalator		Ground Floor	Back Of House	Stock Room		In Service	Unknown
	LCD10	Physical	REAR UP	(00006) Tower Bridge Demo	Escalator		Ground Floor	Back Of House	Stock Room		In Service	O&K
	LCD6	Physical	FRONT UP	(00006) Tower Bridge Demo	Escalator		Ground Floor	Back Of House	Stock Room		In Service	O&K
	LCDB	Physical	REAR DOWN	(00006) Tower Bridge Demo	Escalator		Ground Floor	Back Of House	Stock Room		In Service	O&K
	LCD15	Physical	REAR UP	(00006) Tower Bridge Demo	Escalator Fire Shutter		Ground Floor	Back Of House	Stock Room		In Service	BOLTON BRADY
	LCD16	Physical	REAR DOWN	(00006) Tower Bridge Demo	Escalator Fire Shutter		Ground Floor	Back Of House	Stock Room		In Service	BOLTON BRADY
	LCD17	Physical	FRONT UP	(00006) Tower Bridge Demo	Escalator Fire Shutter		Ground Floor	Back Of House	Stock Room		In Service	BOLTON BRADY
	Evec Chair - Fictive Asset 002774	Physical	Evac Chair - Fictive Asset 002774	(00006) Tower Bridge Demo	Evac Chair		Ground Floor	Back Of House	Offices		In Service	Unknown
	Fire Alarm - Fictive Asset 012718	Physical	Fire Alarm - Fictive Asset 012718	(00006) Tower Bridge Demo	Fire Alarm Panel		Ground Floor	Back Of House	Training Room		In Service	Unknown
	Fire Shutter - Fictive Asset 002910	Physical	Fire Shutter - Fictive Asset 002910	(00006) Tower Bridge Demo	Fire Shutter		Ground Floor	Back Of House	Offices		Decommissioned	Unknown

2. If there are multiple Clients, the User will need to select the Client the Asset is for. They are then required to choose the Building and Equipment Type from the relevant drop downs. Once chosen, click "Create" to move the Create Asset screen.

Create Asset		×	nc
Client	Ostara Demo		nc
Building	Start typing here or select from list below		0
	(select)	,	0
Equipment Type	Start typing here or select from list below		0
	(select)	,	
			0
			0
			0
			0
			0
			0
			0
	Create Cancel		
			2

3. On the Create Asset screen there are four sections to enter information: Asset Number, Asset Location, Notes and Warranty. Each of these are described below.Asset Number section:

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Asset Number is a freeform field to input the number that will be assigned to the new Asset. This can be numbers and letters.

Known as Name is a freeform field to enter the name that this Asset is commonly referred to.

Equipment Type is a field that displays the Equipment Type selected for the Asset. Clicking the "Change" button will allow the User to select an new Equipment Type from the drop down.

Condition is a drop down field to choose the condition the new Asset is in. These conditions are configured in the system.

Risk is a drop down field to choose the risk associated to the new Asset. These risks are configured in the system.

Status is a drop down field to choose the current status of the Asset. A specific Permission exists to restrict a User's ability to change this field.

Model Number is a freeform field to enter the model number of the Asset. This can be numbers and letters.

Serial Number is a freeform field to enter the serial number of the Asset. This can be numbers and letters.

Purchase Date is a date field to enter the date this Asset was bought. Clicking the Calendar icon display a date picker.

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Life Expectancy is a freeform number field to enter how long the Asset is expected to last for.

Depreciation Period is a freeform number field to enter how long the depreciation period for the Asset will be.

Purchase Price is a currency field to enter the amount the Asset was purchased for.

Replacement Cost is a currency field to enter the amount it costs to replace the Asset.

Date Last Checked is a date field which provides the ability to enter the last date this Asset was checked.

Asset Location section:

Asset Location		
Building	(00006) Tower Bridge Demo	
Location	(select)	
Location Extra		
Additional Buildings	Change	

Building is a field that displays the Building selected for the Asset. Clicking the "Change" button will allow the User to select an new Building from the drop down.

Location is a drop down field to choose the location of the Asset.

Location Extra is a freeform field to extra information regarding the location of the Asset.



Save

Save

Notes is a freeform field to enter extra information regarding the Asset.

Warranty section:

Under Warranty? 🗌

Under Warranty is a tick box to specify whether the Asset under warranty or not.

When the "Under Warranty?" box it ticked:

Under Warranty?	•	
Under Warranty With	(select)	~
Use as primary resource for this asset?		
Warranty Type	Parts Only 🗸	
Start Date	e.g. 23/11/2023	
End Date	e.g. 23/11/2023	
Exclude from PPMs during warranty period?		

Under Warranty is a tick box to specify whether the Asset under warranty or not.

Warranty Resource is a drop down field to choose who the Warranty Resource for the Asset is.

Use as primary resource for this asset? is a tick box to specify whether the selected Warranty Resource is the primary Resource for the Asset.

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Warranty Type is a drop down field to choose what type of warranty this Asset has.

Start Date is a date field which provides the ability to enter the start date of the warranty.

End Date is a date field which provides the ability to enter the end date of the warranty.

Click "Save" next to any of the sections once all information in entered to create the Asset.

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