

# Creating Assets

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.

Filters   Building: (00006) Tower Bridge Demo											
Assets   Refresh											
Total: 32											
2 3											
Show 10 , 15 , 25 , 50 , 75 , 100 per page											
Asset Number	Asset Type	Known As	Building Name	Equipment Type	Sub Equipment Type	Level	Area	Location	Location Extra	Status	Manufacturers
Auto Doors - Fictive Asset 000029	Physical	Auto Doors - Fictive Asset 000029	(00006) Tower Bridge Demo	Automatic Sliding Door		Ground Floor	Customer Facing	Entrance		In Service	Unknown
Refrigeration - Fictive Chilled REF102	Physical	Refrigeration - Fictive Chilled REF102	(00006) Tower Bridge Demo	Chilled Multideck Cabinet		Ground Floor	Customer Facing	Entrance		In Service	Unknown
Refrigeration - Fictive Drinks REF192	Physical	Refrigeration - Fictive Drinks REF192	(00006) Tower Bridge Demo	Chilled Multideck Cabinet		Ground Floor	Customer Facing	Entrance		In Service	Unknown
Kitchen Outdoors - Fictive Asset 013155	Physical	Kitchen Outdoors - Fictive Asset 013155	(00006) Tower Bridge Demo	Duct Work		Ground Floor	Back Of House	Training Room		In Service	Unknown
Emergency Lighting - Fictive Asset 009493	Physical	Emergency Lighting - Fictive Asset 009493	(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
LC010	Physical	REAR UP	(00006) Tower Bridge Demo	Escalator		Ground Floor	Back Of House	Stock Room		In Service	OS&K
LC06	Physical	FRONT UP	(00006) Tower Bridge Demo	Escalator		Ground Floor	Back Of House	Stock Room		In Service	OS&K
LC08	Physical	REAR DOWN	(00006) Tower Bridge Demo	Escalator		Ground Floor	Back Of House	Stock Room		In Service	OS&K
LC015	Physical	REAR UP	(00006) Tower Bridge Demo	Escalator Fire Shutter		Ground Floor	Back Of House	Stock Room		In Service	BOLTON BRADY
LC016	Physical	REAR DOWN	(00006) Tower Bridge Demo	Escalator Fire Shutter		Ground Floor	Back Of House	Stock Room		In Service	BOLTON BRADY
LC017	Physical	FRONT UP	(00006) Tower Bridge Demo	Escalator Fire Shutter		Ground Floor	Back Of House	Stock Room		In Service	BOLTON BRADY
Evac 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

Client

Ostara Demo

Building

Start typing here or select from list below...

(select...)

Equipment Type

Start typing here or select from list below...




(select...)

Create

Cancel

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:**

Asset Number	<input type="text"/>
Known As Name	<input type="text"/>
Quantity	<input type="text"/>
Equipment Type	Air Conditioning Humidification System Risk Assessment <a href="#">Change...</a>
Condition	(unknown) ▼
Risk	(unknown) ▼
Status	In Service ▼
Manufacturer	(select...) ▼
Model Number	<input type="text"/>
SFG Code	<input type="text"/>
Serial Number	<input type="text"/>
Purchase Date	e.g. 23/11/2023 
Last Upgrade/Refurb Date	e.g. 23/11/2023 
Life Expectancy (years)	<input type="text"/>
Depreciation Period (months)	<input type="text"/>
Purchase Price	<input type="text"/>
Replacement Cost	<input type="text"/>
EnergyRating (KW)	<input type="text"/>
Date Last Checked	e.g. 23/11/2023 
Operational?	<input type="checkbox"/>

**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.

**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:

The screenshot shows a form titled "Asset Location" with a blue header bar containing a "Save" button. The form contains four fields: "Building" with a dropdown menu showing "(00006) Tower Bridge Demo" and a "Change..." button; "Location" with a dropdown menu showing "[select...]" and a "Change..." button; "Location Extra" with a text input field; and "Additional Buildings" with a text input field and a "Change..." button.

**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.

### Notes section:

The screenshot shows a form titled "Notes" with a blue header bar containing a "Save" button. The form contains a single text input field labeled "Notes".

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

### Warranty section:

The screenshot shows a form titled "Warranty" with a blue header bar containing a "Save" button. The form contains a single checkbox labeled "Under Warranty?".

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

When the "Under Warranty?" box it ticked:

The screenshot shows the "Warranty" form with the "Under Warranty?" checkbox ticked. Below it, there are several fields: "Under Warranty With" with a dropdown menu showing "[select...]", "Use as primary resource for this asset?" with a checkbox, "Warranty Type" with a dropdown menu showing "Parts Only", "Start Date" with a date input field showing "e.g. 23/11/2023", "End Date" with a date input field showing "e.g. 23/11/2023", and "Exclude from PPMs during warranty period?" with a checkbox.

**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.

**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 is entered to create the Asset.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=547>