

# Equipment Types

Wed, Jan 17, 2024 [Equipment and Services](#)

Equipment Types are used to represent the types of equipment that relate to the Sub Work Order Type they exist under. Sub Equipment Types are used to represent the different components under an Equipment Type. For example: the Equipment Type could be Escalator where the Sub Equipment Type could be the Emergency Stop Button.

1. The first step is to select the Client that will be used. For information on how to do this, see the [Client Selection](#) page.

2. This is the “Equipment/Service Types” screen. A list of all the items against the selected Client is shown. It is possible to tick and un-tick Equipment/Service types to determine whether it can be used throughout the system. A summary of the selected item is displayed on the right.

Ostara Equipment/Service Types

Equipment/Service Types Add

- Less Able Platform Lift
- Operating Key
- Lift Consultancy Fee
- Lift Entrapment
- Passenger Lift
- Call Buttons
- Call Buttons/Display
- Car
- Car Gates/Door
- Control Panel
- Display
- Emergency Phone
- External Doors
- Internal Doors
- Landing Gate/Door
- Lift Motor
- Lighting
- Operating Key
- Stair Lift
- Control Panel
- Seat
- Track
- Monitoring
- Monitoring
- Redcare Line
- Travelators/Conveyors
- Travelator/Conveyor

lift << >>

Equipment Details Edit

Name	Passenger Lift
Description	Passenger Lift
Summary	<b>Cost Code:</b> 74723 <b>Sub Cost Code:</b> 74675 <b>Is Supported?:</b> Yes <b>Is Meter?:</b> No <b>Asset Tagging Required?:</b> Yes <b>Is FGas?:</b> No <b>Allow Asset Systems?:</b> No <b>Work Order Types:</b> Audit, PPM, Quote, Reactive, Reactive Work Order <b>Certificates:</b> Passenger Lift Maintenance <b>Reasons:</b> Hire, Insurance, Minor Works, Misuse and Abuse, Rechargeable Works, Wear and Tear Breakdown <b>Symptoms:</b> Damaged, Damaged Housing, Entrapment, Faulty Display, Lights not Working, Not Levelling <b>Part Types:</b> Buttons, Contactor, Display, Door, Floor, Floor Plate, Handle, Handset, Housing, Lights (Showing 10 out of 15)

Save Cancel

3. Click on “Add” to add an Equipment/Service Type. Choose whether to add an “Equipment Type” or a “Service Type” under the currently selected WO Type. If an Equipment or Service is currently selected then the options to add either “Sub Equipment” or “Sub Service” will appear.

Sub Equipment under 'Bakery Oven'

Equipment under 'Bakery Ovens'

Service under 'Bakery Ovens'

Work Order Type

4. This is the Add Equipment Type screen that appears after choosing to add an Equipment Type. Each of the fields require different pieces of information to be entered. The fields are explained below:

**Name** is a freeform field to enter the name of the Equipment Type.

**Cost Code** is a freeform field to enter the Cost Code this Equipment Type will be associated with. This and the Sub Cost Code field are permission based.

**Sub Cost Code** is a freeform field to enter the Sub Cost Code this Equipment Type will be associated with. This and the Cost Code field are permission based.

**Is Supported?** is a tick box. If this box is un-ticked then the User is stating that this item is not supported and that a Non-Supported Reason needs to be given. This is so that if a Work Order is logged against this type, whoever is logging it is told that Work Orders cannot be raised against this type and that they must raise it in a different manner, such as contacting their IT department. These details go in the Non-Supported Reason.

**Non-Supported Reason** is a freeform field. This is where the reason why the Equipment type isn't supported is entered.

**Is Meter?** is a tick box to determine whether the Equipment Type is a Meter.

**Unit of Measurement** is a pop up screen where the Measurement Units of the Equipment Type are selected. This screen is only available if the "Is Meter?" tick box is selected.

**Asset Tagging Required?** Tick this field if Asset Tagging is required for this particular Equipment Type.

**Is FGas?** is a tick box to determine whether the Equipment Type is FGas.

**Allow Asset Systems?** is a tick box to determine whether Equipment Type will be available for Asset System.

**Revenue Only?** is a tick box to determine whether the Equipment Type can have a Capital Project Budget Code associated to a Work Order. If an Equipment Type is marked as

Revenue Only then Work Orders with this Equipment Type cannot be capitalised.

**Work Order Types** is a pop up screen where the Work Order Types, that the Equipment Type will be associated with, are chosen.

**Certificates** is a pop up screen. This is where the Certificates that relate to the Equipment Type are chosen.

**Reasons** is a pop up screen. The Reasons as to why the issue occurred are chosen in this screen. Misuse and Abuse/Accidental Damage is selected by default and cannot be removed.

**Symptoms** is a pop up screen where the Symptoms (ways to describe the issue) for the Equipment Type are selected.

**Part Types** is a pop up screen where the Part Types for the Equipment Type are chosen. Part Types only apply to Equipment items, not Service items.

**Keywords** is a freeform field. Entering Keywords enables the Equipment Type to appear in a search if the specific Keywords are searched for.

5. Once all the necessary information has been entered, click the "Save" button. The new Equipment Type will be shown in the list under the chosen Sub Work Order Type.

**Note:** When creating a Sub Equipment/Service Type, only the Name, Description, Cost Codes, Symptoms, Part Types and Keywords can be modified. Everything is inherited from the parent type.

**Note:** When editing an Equipment type there is an additional "image" button (screenshot below) which allows a picture to be stored against that equipment type. This is uploaded in the same way as [uploading a document](#). This picture is displayed to Portal Users when creating a Reactive Work Order in the Web Portal.

The screenshot shows the 'Edit Equipment' form with the following details:

- Name:** Bottle Cabinet
- Cost Code:** [Empty]
- Sub Cost Code:** [Empty]
- Is Supported?:**
- Non-Supported Reason:** [Empty]
- Is Meter?:**
- Unit of Measurement:** [Empty]
- Asset Tagging Required?:**
- Is FGas?:**
- Allow Asset Systems?:**
- Revenue Only?:**
- Work Order Types:** Quote, Reactive
- Certificates:** Click here to make a selection
- Reasons:** Accidental Damage, Wear and Tear Breakdown
- Symptoms:** Damaged
- Part Types:** Click here to make a selection
- Keywords:** [Empty]
- Image:** Image...
- Buttons:** OK, Cancel

Once a new Equipment/Service Type has been created, please ensure to then follow the necessary steps to add that Equipment/Service Type to any relevant SRAs and Contracts.

Online URL: <https://ostarasystems.knowledgebase.co/article.php?id=70>