

Module 7: Asset Management

7.1 Module Overview

Asset Management tracks the financial, contractual, and inventory details of hardware, software, and virtual infrastructure - as well as non IT assets - throughout their life cycle. Asset requests are handled using workflows to obtain approvals, validate entitlements and provision services. Once an asset is deployed, Asset Management records all maintenance activity and enables locator in-charges to perform regular audits, right up until asset retirement.

There will be a number of assets in a business. These assets are meant to be maintained by an in-charge of where the asset is located.

These 'Locator in-charges' are set from Warehouse Maintenance > Locators. If any defects or repair required for an asset under a location, it will be initiated by that locator's in-charge. They will have to file a complaint regarding the issue in 'Complaint Register' menu.

7.2 User creation

- Navigate to **Administration** → **Users**
- In the 'Users' screen, click on the '+' icon to add a new User.

The screenshot shows a web form for creating a new user. The form is titled 'USER' and is divided into several sections:

- User:** Fields for Name*, Organisations* (dropdown), Role* (dropdown, set to Admin), Password*, Confirm Password*, and User PIN*.
- Address:** Fields for Address 1, City, ZIP, EMail Address, and Phone.
- User's Details:** Fields for Calculation Basis (dropdown, set to Invoice), Subtract Amount, Supervisor (dropdown), Frequency Type (dropdown, set to Weekly), Terminal (dropdown), and Commission %.
- Accounting:** Field for Employee Expense Account (dropdown, set to Select).

In the 'User's Details' section, the 'Active' checkbox is highlighted with a red box and a red arrow pointing to it, with the text 'This needs to be selected' next to it. The 'Sales Representative' checkbox is also visible but not selected.

At the bottom right of the form, there are 'Save' and 'Back' buttons.

- Fill in the mandatory user details. Also, the 'Active' and 'Sales Representative' need to be selected as well.
- Once the necessary details are entered, click on the 'Save' button.

7.3 Warehouse Maintenance

- Navigate to **Administration** → **Warehouse Maintenance**

WAREHOUSE MAINTENANCE
User can view Warehouse & Locators based on the selection made here

Search for Warehouse Organization * QSEARCH +ADD

Location	Level	In Transit	Default	Active	Edit
KIMS - Main	01-Level 01	N	N	Y	
KIMS - Main	05-Level 01	N	N	Y	
KIMS-Kollam	05-Level 02	N	N	Y	
KIMS-Kollam	05-Level 03	N	N	Y	
KIMS-Kollam	05-Level 04	N	N	Y	
KIMS - Main	07-Level 01	N	N	Y	
KIMS-KTM	07-Level 02	Y	N	Y	

SAVE BACK

- In the **Warehouse Maintenance** screen, a user can view the list of Warehouses and Locators based on the selection made in the 'Search For' drop down.
- User can create a new warehouse by selecting 'Warehouse' and clicking the '+' icon. Similarly, locators can also be created.

3.1 Creating Warehouse

- Click on Add New Icon

WAREHOUSE MAINTENANCE

Warehouse Editor

Warehouse

Organization Name KIMS - Main

Parent Warehouse

Address*

Intransit

Active

Give the ware house name and address

SAVE BACK

- Enter the name and address of the warehouse.
- Make the warehouse Active and click on Save.

3.2 Creating Locator

Locators have 3 coordinates along with the warehouse name i.e Warehouse-Locator1-Locator2-Locator 3

Eg: **KIMS Ground Floor** (Warehouse) - **ED** (Locator1) - **Room4** (Locator2) - **Bed 3** (Locator3)

Locator 1 is mandatory.

The screenshot shows the 'Locator Editor' form. The 'Organization Name' is set to 'KIMS - Main'. The 'Warehouse' is 'KIMS Main Warehouse'. The 'Locator Incharge' is 'Ghaleel', with a red arrow pointing to it and the text 'Choose the locator in-charge'. Below these are three optional locator fields: 'Locator X*', 'Locator Y', and 'Locator Z', each with a checkbox. At the bottom left, there are checkboxes for 'Default Locator' (unchecked) and 'Active Locator' (checked). At the bottom right, there are 'SAVE' and 'BACK' buttons.

You can also choose a user as locator in - charge. This user will be in - charge of all the assets under his locator.

Each asset may differ from the kind of approach they required for maintaining or repairing according to their features. Hence, we may need to assign Maintenance Owners accordingly. These owners are meant to dealt with the kind of issues he is assigned to. The Issues, Asset Types & its Maintenance Owners are created from 'Asset Owner'.

Whenever a Locator in charge reports an issue added under the 'issue no.'s in Asset type, the maintenance owner will be obliged to proceed with its fixation. They may need to assign an engineer for this. When a maintenance owner login and navigate to 'Complaint Register' menu, he could see the complaints registered for the types to which he is obliged to handle with. From

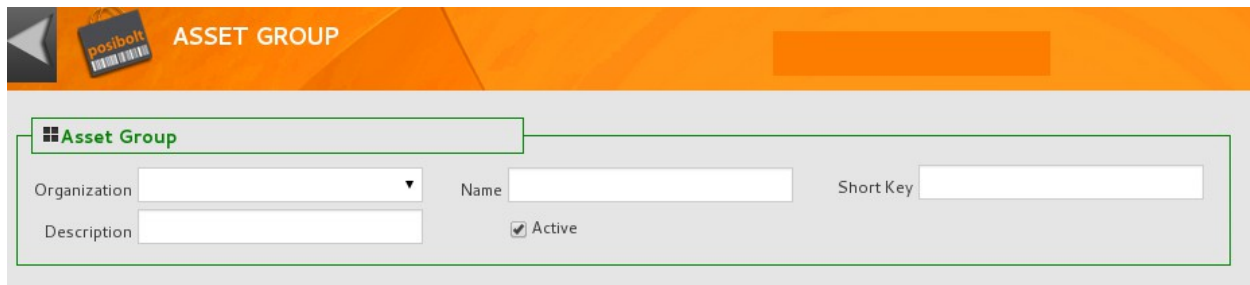
'Complaint Register' menu a Maintenance Owner can assign an Engineer and can add the assigned date.

Engineers are those users who have 'Support engineer privilege' flag checked in their role configuration. The Engineers are supposed to fix the issues and update their status of work in *work detail* in 'Issue fixing' menu.

7.4 Asset Group

To create an asset group

- Navigate to asset group screen
- To add a new asset group,click on + sign.



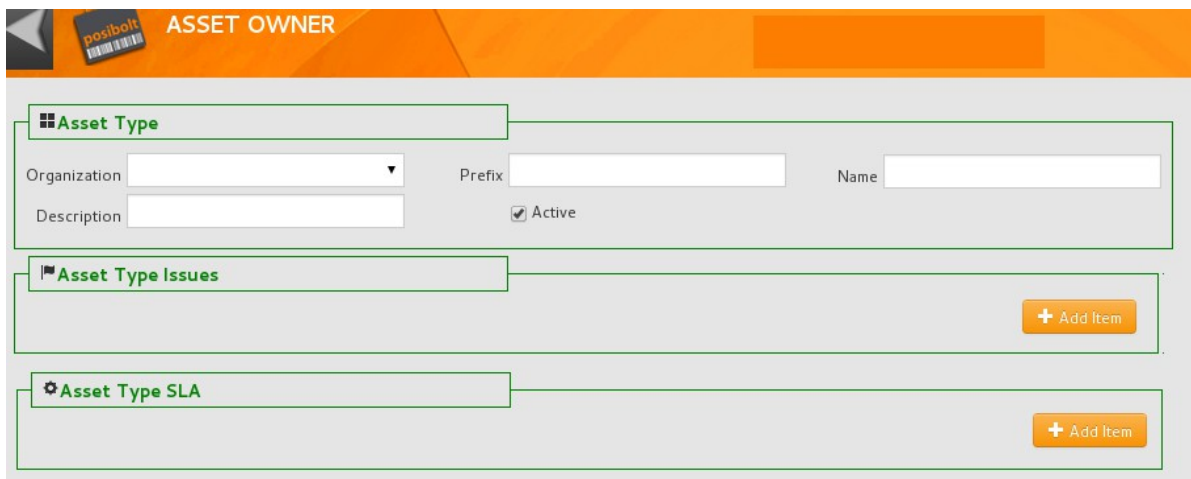
The screenshot shows the 'ASSET GROUP' form. It features a header with the Posibolt logo and the title 'ASSET GROUP'. The form is divided into several sections: a main form area with fields for 'Organization' (a dropdown menu), 'Name', 'Short Key', and 'Description', and a checkbox for 'Active'. Below the main form, there are three sub-sections: 'Asset Type', 'Asset Type Issues', and 'Asset Type SLA', each with an 'Add Item' button.

- Choose an organization from organization drop-down.
- Enter a name for the group in the name text-box.
- Enter a short key for the name.
- Provide a description.
- Then click on save button.

7.5 Asset Owner

To create an asset owner,

- Click on + sign

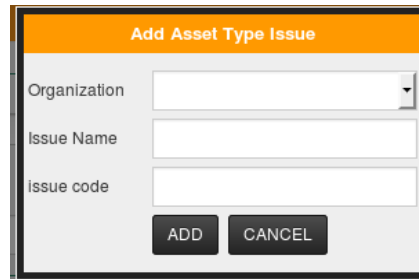


The screenshot shows the 'ASSET OWNER' form. It features a header with the Posibolt logo and the title 'ASSET OWNER'. The form is divided into several sections: a main form area with fields for 'Organization' (a dropdown menu), 'Prefix', 'Name', and 'Description', and a checkbox for 'Active'. Below the main form, there are two sub-sections: 'Asset Type Issues' and 'Asset Type SLA', each with an 'Add Item' button.

- Choose an organization.
- Provide a prefix.
- Enter a name.
- Provide a description.

5.1 Asset Type Issues

To enter issues for the asset, click on Add item button in asset type issues

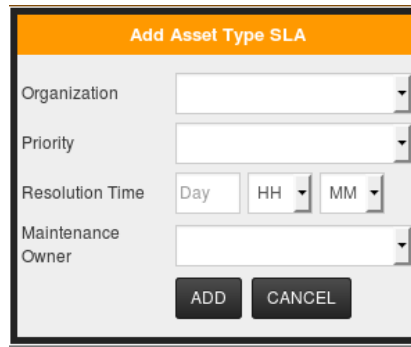


- ✓ Choose an Organization
- ✓ Enter an issue for the asset
- ✓ Enter an issue code for the issue entered.
- ✓ Click on Add button

To add more issue click on 'Add Item' button.

5.2 Asset Type SLA

- ✓ To enter Asset type SLA, click on 'Add item' button,



- ✓ Choose an Organization.
- ✓ Choose a priority from the following
 - Very High.
 - High.

- Medium.
- Low
- Very Low
- ✓ Enter resolution time.
- ✓ Choose a maintenance owner
- ✓ Click on add button.

7.6 Asset creation

Before an asset is created, a corresponding product for that asset is to be created.

6.1 Product creation

- Navigate to **Administration** → **Product Administration**

The screenshot displays the 'PRODUCT ADMINISTRATION' interface with the 'General' tab selected. The interface includes a navigation bar with tabs: Product Details, Advanced Settings, Product Price, Product Attributes, Account, and Vendor Product Price. The 'General' tab contains the following fields and options:

- UPC:** Input field with annotation 'Enter the barcode'.
- SKU:** Input field with an 'Auto' checkbox.
- Product Name*:** Input field with annotation 'Enter the product Name'.
- Description:** Input field.
- Organisation*:** Dropdown menu.
- Product Category*:** Dropdown menu with value '1111'.
- Tax Category*:** Dropdown menu with value 'Tax Exempt Rate % 0'.
- Uom*:** Dropdown menu with value 'Each'.
- Attribute Set:** Dropdown menu with value 'Serial No.' and annotation 'Choose serial No attribute'.
- Group 1:** Dropdown menu with an 'Add New' checkbox.
- Group 2:** Dropdown menu with an 'Add New' checkbox.
- Units Per Pack:** Input field.
- Active/Consigned:** Radio buttons for 'Active' (checked) and 'Consigned'.
- Product Type:** Radio buttons for 'Item' (checked) and 'Service'.
- Barcode Type:** Radio buttons for 'Normal' (checked), 'Weighed', and 'Price'.
- Sale/Purchase:** Radio buttons for 'Saleable' (checked) and 'Purchasable' (checked).
- Cost Price:** Input field with a note: 'Will be affected only if standard costing is enabled'.
- Image Type:** Dropdown menu.
- Image Upload:** 'Browse...' button and 'No file selected.' text.

At the bottom right, there are 'SAVE' and 'BACK' buttons.

- In the **Product Administration** screen, click on the '+' icon
- In the Product details Tab,
- ✓ The mandatory fields, Product category, Tax category, and UOM can left as the default ones.
 - ✓ Selecting 'Serial No' is mandatory.
- To add spares for the product, go to Advance Settings Tab,

Product Details	Advanced Settings	Product Price	Product Attributes	Account	Vendor Product Price
Related Products					
Related Type	Name	IsActive	+		
Alternative		<input checked="" type="checkbox"/>			
Alternative					
Spare					
					SAVE BACK

- ✓ Click on the **Edit Settings** and on the related product screen, add the spares for the product.

7.7 Vendor creation

- Navigate to **Administration → Vendor**
- In the 'Vendor' screen click on the '+' icon to view the add Vendor screen.
- Fill in the mandatory fields and the address field.

Vendor					
Name*	<input type="text"/>	Organisations *	<input type="text"/>	BP Group *	<input type="text"/>
Price List *	<input type="text"/>	vat.no	<input type="text"/>	Payment Term	<input type="text"/>
Invoice Rule	<input type="text"/>	Delivery Rule	<input type="text"/>	Payment Rule	<input type="text"/>
Currency	<input type="text"/>	Credit Limit	<input type="text"/>	Rating	<input type="text"/>
Comments	<input type="text"/>				
<input type="checkbox"/> Tax exempt					
Address					
Address 1	<input type="text"/>	Address 2	<input type="text"/>	City	<input type="text"/>
EMail Address	<input type="text"/>	Country	<input type="text"/>	Region/State	<input type="text"/>
Phone					
Phone	<input type="text"/>	2nd Phone	<input type="text"/>	Fax	<input type="text"/>
Accounting					
Vendor Liability Account	<input type="text"/>				
Vendor Prepayment Account	<input type="text"/>				
					Save Back

- After filling the data, click on the 'Save' button.

7.8 Receive Goods

For receiving an asset into the inventory, that product has to be received via 'Received Goods'.

- Navigate to **Purchases → Receive Goods**
- In the **Receive Goods screen**, type in the vendor name and select it.
- To choose the product, enter the barcode of the product and hit enter.
- A pop up box to enter the serial No. appears.
- Enter the serial No. for that product.
- Once the product is entered, click on the 'Check Out' button.

7.9 Asset Administration

After a product is received, that product needs to be converted to an Asset.

- Navigate to **Asset Management → Asset Administration**

ASSET ADMINISTRATION

Asset | Asset Balances | Activation/Addition | Accounting Setup | License Details | Insurance Details

General

Organization: 24X7 | Asset No. | Inventory No. | Name | Part No. | Active | **First the product name should be selected**

Parent Asset | Asset Type: Maintenance | Asset Group | Product | Serial No. | Manufactured Year: eg. 2010 | Manufacturer | Lot No. | AMC Start Date | AMC End Date | Guarantee Date | Warranty Date | Create Date: 16-10-2015 | Comment/Help

Location

In Possession | Owned | **Assign the location to the asset**

Warehouse: * | Locator: 24X7 Warehouse-1000004 | Vendor

SAVE | BACK

- In the Asset Management screen, click on the '+' icon to view the Asset Details screen.
- In the Asset Details screen's 'Product' field, type in the product which has been received (via Received Goods).
- Select the product which is shown upon typing the product name.

- Once the product is selected, the respective details of the product automatically fills up in the respective text fields. The remaining details can be filled in manually.
- Asset name will generated automatically as a combination of product name and its serial number,i.e product name - serial no.
- Choose the required organization from the drop - down.
- Choose the asset type and asset group from the respective drop - down box.
- If a parent asset is required to be set for an asset , then in the 'Parent Asset' field,type in the asset. Select the asset which is shown upon on typing the asset name.
- Asset number will be automatically generated based on the Organization, Asset type and asset group chosen followed by a sequence number, i.e *orgid-asset group-asset type-sequence number*.
- If a parent asset is set for an asset,then the asset number will be based on the parent asset's asset number followed by a sequence number.
- An asset could be either 'owned' or 'in possession' or both.
 - ✓ In Possession:
If checked, the asset is in our possession.
If unchecked; this means the asset is not in our control but with some other users. You can enter possessed users' name for tracking. This is the case in which our asset is rented out to someone else.
 - ✓ Owned:
If checked, asset is owned by the company.
If unchecked; means we're not the owners of the asset but we using it.
- Choose the location to where the asset belongs to,by selecting the required warehouse and locator.
- Once the details are entered, click on the 'Save' button.

9.1 Importing an Asset

If bulk assets are to be taken in to the system, the User can directly import the assets via csv file.

- Navigate to **Administration → Import/Export**
- In the **Import/Export** screen, chose the type as 'Asset'

- Create a CSV file in which the assets to be imported are to be given in the format shown in the screen. The template can be downloaded upon clicking the 'Asset Template' link.
- Once the file is ready to be imported, click on the 'Import' radio button.
- From the corresponding pop up window, choose the file from the saved location.

7.10 Complaint Register

Whenever there is any issue with an asset, the locator in-charge can raise a complaint for that asset for resolving the issue. The Maintenance owner can edit the request to assign an Engineer for fixing the issue.

- Navigate to **Asset Management → Complaint Register**

The screenshot shows the 'COMPLAINT REGISTER' interface. At the top, there are navigation icons (home, help, refresh) and a search bar. Below the search bar, there are filters for Assigned To, Asset, Priority, Status, From (Date), and To (Date). A 'SEARCH' button is present. The main area displays a table of requests with columns: Request ID, Asset, Issue, Assigned To, Status, Due Date, Elapsed Time, Reported By, and Request Edit. The table contains two rows of data. To the right of the table, there are 'PDF' and 'CSV' export buttons. A sidebar on the right shows details for a selected asset: X-ray-S401, Location: BAKERY KITCHEN 0-0-0, Document No: 1000009, Reported Date: 06-Jan-2017, Description: in hospitals, there is always a danger of undesirable machine breakdown. Preventive maintenance can save a lot of time and money. With the help of preventive maintenance services (PMS), it is possible to predict and identify parts which are at verge of co, Priority: Very Low, Issue: MisHandle, Reported By: LIC, Status: Completed.

Request ID	Asset	Issue	Assigned To	Status	Due Date	Elapsed Time	Reported By	Request Edit
1000009	X-ray-S401	MisHandle	Khalid khan	Completed	18-Dec-2016		LIC	
1000009	X-ray-S401	MisHandle	Khalid khan	Completed	18-Dec-2016		LIC	

- In the Complaint Register screen, click on the '+' icon to add a complaint.
- In the complaint details screen, fill in the details and click on the 'Save' button.
P.S: The options listed in the 'Issue' drop - down is used as temporary fillers. It will be updated once the relevant details are acquired.

The screenshot shows the 'Issue Details' form in the Complaint Register. The form has fields for Asset (bedpan-123456), Issue, Request Type, Priority (Very High), Due Date (17-07-2014 15:54:12), and Description. Red arrows point to the Asset, Issue, and Due Date fields, with a red text box below stating: 'These will be populated once as asset is selected'.

- After a complaint has been registered for an asset, the supervisor in charge will be assigning that complaint to the respective engineers. i.e from the main Complaint Register screen, the supervisor opens up the already registered complaint and assigns the engineer from the 'Assign To' drop - down.

7.11 Issue Fixing

- After a complaint has been registered for an asset, the person in charge of resolving the issue navigates to the '**Issue Fixing**' screen (**Asset Management** → **Issue Fixing**).

Issue Details

Request ID: 1000189 Asset: tube light-9 Issue: function
 Request Type: Repair Priority: Very High Due Date: 29-10-2014 15:33:29
 Assigned To: Technical engg Assigned Date: 27-10-2014 Description:

Work Details

Start Date: 27-10-2014 End Date: 28-10-2014 Work Status: In Progress
 Work Description: Add Attachment: Choose File (No file chosen) Download

Add Resources

Resource Type	Product/Support Engineer	Quantity	
Spare	led	1	+
Human Resource	sahla		


Maintenance Details: Last Maintained: 27-Oct-2014

Warranty Details

Save Back

- In the '**Complaint Solution**' screen, search and retrieve the registered complaint.
- From the listed complaints, click on the Work Edit icon of the complaint that is to be worked upon.
- In the work details screen, the engineer fills in the respective work details.
- Additional spares or support engineers taken can be added under the 'Add Resource' section.
- Choose any work status from the following.
 - In Progress
 - Awaiting Spare

- Completed : If any spares are used , it will be remained as reserved in stock.
- Once the details are added, click on the 'Save' button.
- After the Engineer changes the status to 'Completed',the supervisor in charge will change the status to 'Verified', i.e from the main Complaint Resolution screen, the supervisor opens up the already completed complaint and changes the work status to 'Verified'(If any spares are used,the quantity of the spare will get reduced from the stock).
- Engineers will login an update their works in issue fixing screen. When the status get completed it will appear in Asset administration → Maintenance details tab of that Asset.


ASSET ADMINISTRATION

Asset	Asset Balances	Activation/Addition	Accounting Setup	License Details	Insurance Details	AMC/CMC Details	Maintenance History
Request Id	Issue	Assigned To	Description	Required Date	Reported By		
1000009	MH	Khalid khan	In hospitals, there is always a danger of undesirable machine breakdown. Preventive maintenance can save a lot of time and money. With the help of preventive maintenance services (PMS), it is possible to predict and identify parts which are at verge of co	18-Dec-2016	LIC	DETAILS	

X-ray-S401 - 1000260

ATTACHMENTS
SAVE
BACK

7.12 User Accessibility

12.1 Complaint Register Screen.

Who can register a complaint?

A user who is set as a locator in - charge for an asset,can raise a complaint for that particular asset. No other assets will be available for the user to raise a complaint. The User can view only those complaints which is raised by him.

A user who has been set as maintenance owner in asset owner screen,can raise a complaint, for the assets coming under that particular asset owner type. He can also view and edit the complaints of the assets raised by a locator in - charge if the respective assets are coming under his asset owner type.

A user who is made as an Assistant of the Maintenance Owner(set supervisor as maintenance owner)can have the same accessibility rights as that of maintenance owner. He can raise a complaint for the assets coming under the asset owner of his supervisor. He can also view and edit the complaints of the

assets raised by a locator in-charge if the respective assets are coming under the asset owner type of his supervisor.

Who can assign a complaint to engineers?

A user who is set as a maintenance owner can have the privilege to assign an engineer for a complaint. The user who will be listed with complaints of the assets which is under his asset owner type, can assign engineers for those complaints.

A user who is made as an assistant of maintenance owner (set supervisor as maintenance owner) can also assign engineers for the complaint same as his supervisor.

12.2 Complaint Solution Screen

Who can access issue fixing screen

A user who is set as an engineer (whose 'support engineer privileges' is enabled in role configuration) have the privilege to use the complaint solution screen. Here the user will be listed with only those complaints which is assigned to them by the maintenance owner or his assistant. This user can give the status regarding the solution of the complaints in the complaint solution screen.

A maintenance owner and his assistant can also view and edit all the complaints of the assets coming under their asset owner type in the issue fixing screen.