

Quadpro Help Desk

Adding an Asset to a Space

Adding an Asset to a Space:

If you want to add an asset directly from the space list, firstly open the space that you want to add a new asset to.

Then using the tabs along the bottom select assets and then **'Add'**

Once you are on this tab, simply enter the details as needed for the new asset.

***Asset Name:**

Enter the name of your **Asset** in this field, this can be a varying number of items. These can be anything from a boiler, to tables – and computers or fire sprinklers.

Ref: the Asset reference will be automatically generated for you.

***Type:**

For type you will need to select what they are. For example a boiler would be Cyclical and Statutory and Server would come under data.

***Department:**

Where this item is located. A server would be located in the ICT department.

***Staff:**

From this list please choose who is responsible for this asset. For a boiler this would be handled by the caretaker and for the server it would be an ICT technician.

These two fields can be customised from **The Glossary**. For example we have chosen to use Cycle and Cost.

Location: in this field the building and space where this asset is located will be displayed.

Current Value: Over time your Assets will depreciate in value, if the purchase price was £1000 and the value decreases every 2 years, simply enter the value of what it would be worth now into the field. This allows you to determine financially if an Asset is worth repairing or simply replacing.

Bar Code: This is a new feature which will be available to Users. Please contact us for further details.

Notes: If you have any notes that you would like to enter regarding the Asset, please write it in here.

Purchase Date: Please enter the date that this Asset was purchased.

Guarantee Date: If the Asset supplier has provided a Guarantee on this Asset please enter it here. For example , a 5 year warranty.

Cost: Enter how much this Asset cost to buy.

Number of: enter how many of this asset you have. If it is an individual select 1, if you have a group of assets, enter as required.

Estimated Life: Enter how long this Asset will last before it will need replacing.

CYCLE: How often do you want this Asset checked

COST: How much does the maintenance cost for this Asset?

You may also add **Photos and Documents** to the Asset's information.

Adding an Asset Photo:

Once you have successfully saved your Asset, please return to the **Home Screen** and open the '**Asset Photos**' folder.



In this folder you will be able to store all images of Assets.

For example, your Main Boilers Asset Reference number is 00084, please locate the image you want to use of that asset and place it into the '**Asset Photos**' folder. To ensure the image appears in the Asset section, please save it as '**A84**' (REFERENCE NUMBER)

To view this photo please select 'Photo' from the tab in your assets information window.

Adding Asset Documents:

Once you click on the documents tab you will have a pre defined folder link (named after the asset reference number , e.g 84) where you can store warranty documents and user manuals. Simply double click on this link to open the folder and you can then drag and drop any files related to that asset into the folder for easy access.

A screenshot of a web application window titled 'New Asset for Boiler Room'. The window has a blue header bar with the title, a clock showing '10:44 AM' and 'Thursday, 12 April 2018', and a blue button labeled 'Assets'. Below the header is a tabbed interface with 'General', 'Photo', and 'Documents' tabs. The 'General' tab is active, showing various input fields for asset information. At the bottom of the form is a table with columns for 'o', 'Date', 'Comment', 'Type', 'By', 'Cost', 'P', and 'Date Done'. Below the table are buttons for 'Add', 'Delete', and a counter '0'. At the very bottom of the window are navigation buttons: '<', '>', 'Save', 'Exit', and 'Print'.

To add a planned maintenance cycle to this asset, select add from the bottom list.

The screenshot shows a web-based form titled "New Asset Maintenance Details for". The form contains the following fields and controls:

- Date Due:** A date input field with the value "12/04/2018".
- Auto JR lead time (in days):** A numeric input field with the value "0".
- ID:** A numeric input field with the value "2711".
- Comment:** A text input field.
- Type:** A dropdown menu.
- every:** A numeric input field with the value "0".
- for:** A dropdown menu.
- Years:** A numeric input field with the value "0".
- Cost:** A numeric input field with the value "£0.00".
- By:** A text input field.
- Associated File(s):** A text input field.
- Upload Doc:** A blue button.
- Delete Doc:** A red button.
- Open Doc:** A green button.
- Folder:** A green button.
- Passed:** A checkbox.
- Date Done:** A date input field with the value "00/00/00".
- Next Date:** A date input field with the value "00/00/00".
- Notes:** A large text area.
- Navigation:** A set of buttons at the bottom including "Save" (green) and "Exit" (red).

Using the above form, you are able to set up an automatic job request for this asset.

Enter the planned maintenance details within the form and you will be able to generate automatic requests for operatives or contractors. There is also an option for you to have this Auto Job Request repeated as and when you need it done.

Using the '**Upload Doc**' section you can include all relevant details about that asset, and open them at any time using 'open doc'.

Once complete, select save and the new asset will be added to your chosen space, in this example – the boiler room.

If you wish to delete a Planned Maintenance job for an asset simply click on the desired row and use the '**Delete**' button below the list.