

# ***ASSETSonTRACK 100***

## **User's Guide**

**Version 1.00**



# 1 TABLE OF CONTENTS

<b>1</b>	<b>TABLE OF CONTENTS</b> .....	<b>II</b>
<b>2</b>	<b>LICENSE AGREEMENT</b> .....	<b>VI</b>
<b>3</b>	<b>TERMS COMMONLY USED THROUGHOUT THE DATABASE</b> .....	<b>VII</b>
<b>4</b>	<b>BEFORE YOU START</b> .....	<b>1</b>
4.0	SYSTEM REQUIREMENTS .....	1
4.1	SETTING UP .....	1
4.1.1	<i>Setting up with Microsoft Access 2003</i> .....	1
4.1.2	<i>Setting up with Microsoft Access 2007</i> .....	2
<b>5</b>	<b>INSTALLING</b> .....	<b>3</b>
5.0	INSTALLING ASSETSONTRACK.....	3
5.1	ASSETSONTRACK DATASERVER .....	3
5.1.1	<i>Installing</i> .....	3
5.1.2	<i>Accessing</i> .....	3
5.1.3	<i>Data Server Manager</i> .....	4
5.2	ASSET MANAGEMENT DATABASE .....	4
5.2.1	<i>Installing</i> .....	4
5.2.2	<i>Trial Basis</i> .....	4
5.2.2.1	<i>Registering</i> .....	4
5.2.2.2	<i>Obtaining Authentication Key</i> .....	5
<b>6</b>	<b>OPENING AND USING DATABASE</b> .....	<b>5</b>
6.1	OPENING FOR THE FIRST TIME .....	5
6.2	CONTINUED USE .....	5
<b>7</b>	<b>BACKING UP THE DATABASE</b> .....	<b>6</b>
7.0	OVERVIEW .....	6
7.1	BACKING UP .....	6
7.2	RESTORING .....	6
<b>8</b>	<b>LOGGING ON</b> .....	<b>7</b>
8.0	OVERVIEW .....	7
<b>9</b>	<b>DATABASE OPTIONS</b> .....	<b>7</b>
9.0	OVERVIEW .....	7
9.1	OPTIONS .....	7
9.1.1	<i>Repair Management</i> .....	7
9.1.2	<i>Management of Repairs from a particular PC</i> .....	7
9.1.3	<i>Purchase Details/Depreciation</i> .....	7
9.1.4	<i>Image of Asset</i> .....	8
9.1.5	<i>Programmed Maintenance</i> .....	8
9.1.6	<i>Previewing Reports before printing</i> .....	8
9.1.7	<i>Use LogOn Screen</i> .....	8
9.1.8	<i>Back up</i> .....	8
9.1.9	<i>Refreshing data links</i> .....	8
<b>10</b>	<b>MAIN MENU</b> .....	<b>9</b>
10.0	OVERVIEW .....	9
10.1	ASSET REGISTER .....	9
10.2	REPAIR MANAGEMENT.....	9
10.3	OUTSTANDING REPAIRS.....	9
10.4	CONTRACTORS .....	9
10.5	OPTIONS .....	9
10.6	ASSET REPORTS .....	9

10.7	REPAIR REPORTS .....	9
10.8	MAINTENANCE REPORTS .....	10
10.9	LOGGING OFF.....	10
10.10	USER ACCOUNTS .....	10
<b>11</b>	<b>ASSET REGISTER .....</b>	<b>11</b>
11.1	ASSETS TAB .....	11
11.1.1	Searching.....	11
11.1.2	Adding.....	11
11.1.3	Editing.....	12
11.1.4	Ancillary Components .....	13
11.1.4.1	Adding Ancillary Components.....	13
11.1.5	Decommissioning.....	13
11.2	REPAIR HISTORY TAB .....	13
11.2.1	Overview.....	13
11.3	MAINTENANCE TAB .....	14
11.3.1	Overview.....	14
11.3.2	Asset Maintenance Program.....	15
11.3.3	Setting up.....	15
11.3.4	Searching.....	15
11.3.5	Maintenance History.....	15
11.4	IMAGE TAB .....	16
11.4.1	Overview.....	16
11.4.2	Adding/Replacing Images.....	16
11.4.3	Removing Images.....	16
11.5	PURCHASE DETAILS TAB .....	17
11.5.1	Overview.....	17
11.6	ASSET MANAGEMENT.....	17
11.6.1	Batch Updating of Asset Details .....	17
<b>12</b>	<b>REPAIR MANAGEMENT.....</b>	<b>18</b>
12.1	OVERVIEW .....	18
12.2	FIELDS .....	18
12.2.1	Date Reported.....	18
12.2.2	Logged By.....	18
12.2.3	Requisition Details.....	18
12.2.4	Contractor Called .....	18
12.2.5	Repair Status.....	18
12.2.6	Date Repaired.....	19
12.2.7	Order No.....	19
12.2.8	Repair time .....	19
12.2.9	Repair Cost.....	19
12.2.10	Follow up Action.....	19
12.2.11	OHS Issues.....	19
12.2.12	Acknowledged.....	19
12.2.13	Completed.....	19
12.3	BUTTONS .....	20
12.3.1	View New Recs.....	20
12.3.2	Repair Times/Repair Details.....	20
12.3.2.1	Employee/Contractor Field.....	20
12.3.2.2	Repair Date Field.....	20
12.3.2.3	Repair Details Field.....	20
12.3.2.4	Start, Finish & Hours Fields.....	20
12.3.3	Add New Repair .....	20
12.3.4	Print .....	21
12.3.5	Issue Order No.....	21
12.3.6	Select Correct Asset .....	21
12.3.7	Delete Requisition.....	21
12.4	SEARCHING .....	21

<b>13</b>	<b>MANAGING REPAIRS .....</b>	<b>22</b>
13.0	OVERVIEW .....	22
13.1	VIEWING AND CONTROLLING .....	22
13.1.1	<i>Unacknowledged requisitions</i> .....	22
13.1.2	<i>Outstanding requisitions</i> .....	22
13.2	REQUISITION POPUP SCREEN .....	23
13.2.1	<i>Dismissing requisitions</i> .....	24
13.2.2	<i>Showing requisitions</i> .....	24
13.3	ADDING A NEW REPAIR REQUISITION .....	24
13.4	PRINTING .....	24
<b>14</b>	<b>CONTRACTORS .....</b>	<b>25</b>
14.0	OVERVIEW .....	25
14.1	CONTRACTOR INFORMATION .....	25
14.1.1	<i>Adding</i> .....	25
14.1.2	<i>Selecting Contractor Types</i> .....	25
14.1.2.1	<i>Active Contractor</i> .....	25
14.1.2.2	<i>Maintenance Contractor</i> .....	25
14.1.2.3	<i>Preferred Contractor</i> .....	26
14.1.2.4	<i>Other Contractor</i> .....	26
14.1.3	<i>Contracts</i> .....	26
14.1.4	<i>Employees and Services Offered</i> .....	26
14.1.4.1	<i>Services Supplied</i> .....	26
14.1.4.2	<i>Employees</i> .....	26
14.1.4.3	<i>Adding an Employee</i> .....	27
14.1.5	<i>Printing</i> .....	27
14.2	REPAIR HISTORY .....	27
14.2.1	<i>Selecting a Contractor</i> .....	27
14.2.2	<i>All Repairs</i> .....	27
14.2.3	<i>Outstanding Repairs</i> .....	27
<b>15</b>	<b>ASSET REPORTS .....</b>	<b>28</b>
15.1	OVERVIEW .....	28
15.2	ASSET REPORTS .....	28
15.2.1	<i>All Assets</i> .....	28
15.2.2	<i>Assets by Category</i> .....	28
15.2.3	<i>Assets by Location</i> .....	28
15.2.4	<i>Assets by Contractor</i> .....	28
15.2.5	<i>Specific Asset</i> .....	29
15.3	CONTRACTOR REPORTS .....	29
<b>16</b>	<b>REPAIR REPORTS .....</b>	<b>29</b>
16.1	OVERVIEW .....	29
<b>17</b>	<b>MAINTENANCE REPORTS .....</b>	<b>29</b>
17.1	OVERVIEW .....	29
17.2	FILTERING .....	29
17.3	GENERATING MAINTENANCE REPORTS .....	30
17.4	MAINTENANCE HISTORY .....	30
<b>18</b>	<b>SCHEDULED MAINTENANCE PROGRAM .....</b>	<b>31</b>
18.1	OVERVIEW .....	31
18.2	MAINTENANCE SCHEDULES .....	31
18.3	MAINTENANCE SCHEDULE FORM .....	31
18.3.1	<i>Maintennace Schedule Form Buttons</i> .....	31
18.3.1.1	<i>New Schedule</i> .....	31
18.3.1.2	<i>Delete Schedule</i> .....	31
18.3.1.3	<i>Print Schedule Code List</i> .....	31
18.3.1.4	<i>Print All Schedules</i> .....	32

18.3.1.5	Preview Sheet Layout.....	32
18.4	PREDEFINING MAINTENANCE SCHEDULES .....	32
18.5	SETTING UP A NEW MAINTENANACE PROGRAM.....	32
18.5.1	Individual Set Up .....	32
18.5.2	Batch Set Up.....	33
18.6	EDITING AND UPDATING A MAINTENANACE PROGRAM.....	33
18.6.1	Editing.....	34
18.6.2	Updating.....	34
18.7	PRINTING A MAINTENANACE PROGRAM .....	34
18.7.1	Overview.....	34
18.7.1.1	Maintenance Work Orders.....	34
18.7.1.2	Maintenance Reviews .....	35
18.7.2	Printing.....	35
18.8	REVIEWING THE MAINTENANCE PROGRAM.....	36
<b>19</b>	<b>USER ACCOUNTS.....</b>	<b>37</b>
19.0	OVERVIEW .....	37
19.1	ACCESS LEVELS .....	37
19.2	ADDING ACCOUNTS.....	37
19.3	EDITING ACCOUNTS .....	38
19.4	SUSPENDING .....	38
19.5	RE-ACTIVATING.....	38
19.6	USER LOG .....	38
19.7	LOST PASSWORDS .....	38
<b>20</b>	<b>PRINTING REPORTS.....</b>	<b>39</b>
20.0	OVERVIEW .....	39
20.1	DIFFERENT REPORT FORMATS .....	39
20.2	RIGHT CLICK MENU.....	39
<b>21</b>	<b>REFERENCE DATA.....</b>	<b>40</b>
21.0	OVERVIEW .....	40
21.1	ACCESSING .....	40
21.2	ASSET CATEGORIES.....	40
21.2.1	ASSET CATEGORY LAYOUTS.....	41
21.2.2	ADDING ASSET CATEGORIES.....	41
21.3	LOCATIONS .....	42
21.4	MAINTENANCE SCHEDULES .....	42
21.5	SCHEDULE FREQUENCIES.....	42
21.6	REPAIR STATUS .....	43
21.7	CONTRACTORS .....	43
<b>22</b>	<b>MENU BARS.....</b>	<b>44</b>
22.0	OVERVIEW .....	44
22.1	ASSET MANAGEMENT MENUS.....	44
22.2	PRINTING MENU.....	46
22.3	RIGHT CLICK PRINTING MENU.....	46
<b>23</b>	<b>APPENDIX A – REMOTE USER INTERFAFE.....</b>	<b>48</b>
23.1	OVERVIEW .....	48
23.2	BEFORE YOU START.....	48
23.2.1	INSTALLING .....	48

## **2 ASSETSonTRACK LICENSE AGREEMENT**

**Copyright (c) 2010 Predator Software and Mechanical All Rights Reserved**

**You should carefully read the following terms and conditions before using this software. Unless you have a different license agreement signed by Predator Software and Mechanical your use of this software indicates your acceptance of this license agreement and warranty. This license agreement covers any release of ASSETSonTRACK with a major release number of 100, for example 100 - 00 etc.**

**If you do not agree with and accept this license agreement, you may not use ASSETSonTRACK**

### **DISCLAIMER OF WARRANTY**

**This software and the accompanying files are supplied on an "as is" basis. There are no warranties as to performance or merchantability or any other warranties whether expressed or implied.**

**The user assumes the entire risk of using the software, any liability of the seller will be limited exclusively to product replacement or a refund of purchase price.**

**Predator Software shall not be held liable for any information entered by the user which may lead to a legal claim for damages etc.**

### **EVALUATION AND REGISTRATION**

**This is not free software. Subject to the terms below, you are hereby licensed to use this software for evaluation purposes without charge for a period of 60 days. If you use this software after the 60 day evaluation period a registration fee is due. When payment is received you will be sent an Authentication Key by email which converts your evaluation copy of ASSETSonTRACK to a registered version after you have entered it in the registration options screen. Note that the distribution of ASSETSonTRACK registration codes is prohibited.**

### **DISTRIBUTION**

**One registered copy of ASSETSonTRACK may either be used by a single person who uses the software personally on one or more computers, or installed on a single workstation used non- simultaneously by multiple people, but not both.**

**You may access the registered version of ASSETSonTRACK through a network, provided that you have obtained individual licenses for the software covering all workstations that will access the software through the network. For instance, if 8 different workstations will access ASSETSonTRACK on the network, each workstation must have its own ASSETSonTRACK license, regardless of whether they use ASSETSonTRACK at different times or concurrently.**

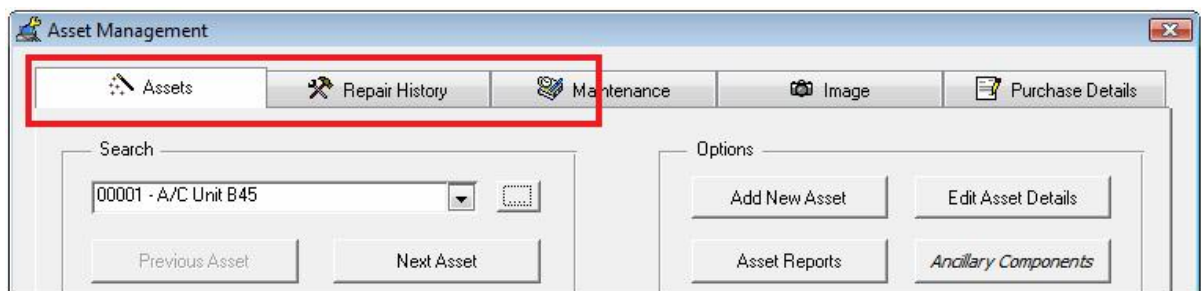
### **GOVERNING LAW**

**This agreement shall be governed by Australian law.**

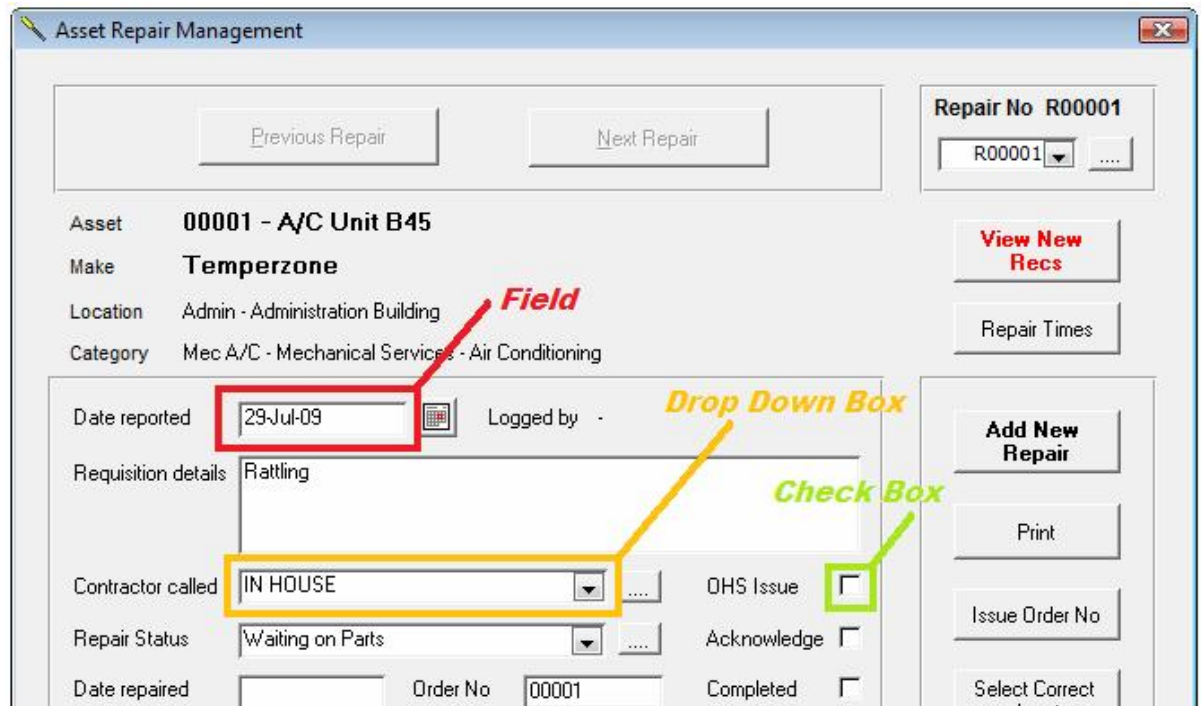
### 3 TERMS USED THROUGHOUT THIS GUIDE

Throughout his guide there are many terms you may not be familiar with. They include:

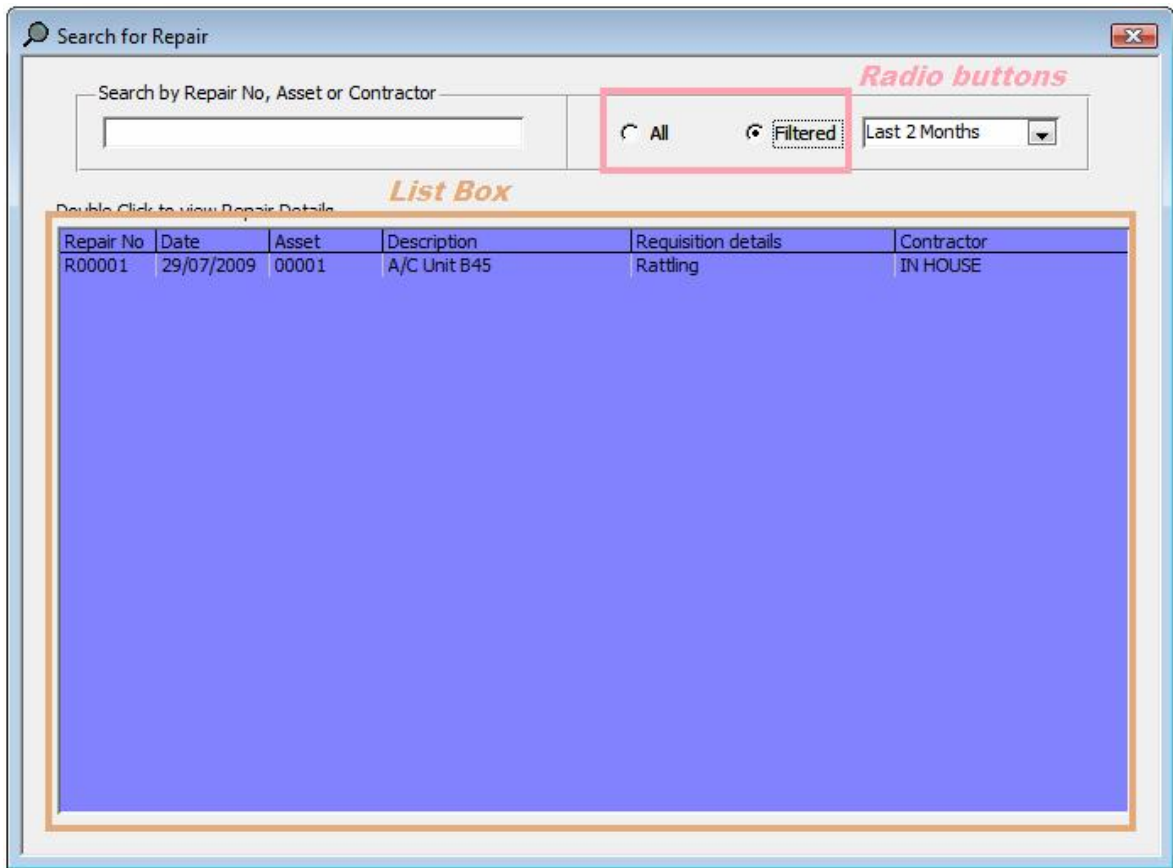
- Form
- Form tabs
- Field
- Drop down box
- Check box
- List box
- Radio button



Asset register form showing form tabs.



Asset repair form showing a data field, drop down box and check box.



Repair search form showing list box and radio buttons.

## 4. Before You Start.

### 4.0 System Requirements.

- Windows XP or later operating system.
- 100 Mb Hard Disk space.
- Display adaptor capable of 1024 x 768 resolution or higher.
- Microsoft Access<sup>®</sup> 2003 or later.
- Recommended: Network Server / Work Station.
- Windows compatible printer.

### 4.1 Setting up ASSETSonTRACK<sup>®</sup>

Before ASSETSonTRACK can be installed on any system you must firstly customise Microsoft Access.

#### 4.1.1 Setting up with Microsoft Access 2003

Open Microsoft Access via the Start Menu. Start -> All Programs -> Microsoft Office -> Microsoft Access.

From the Tool Menu select Tools -> Macro -> Security. Next, select Low and click OK. A warning may be displayed. Click OK

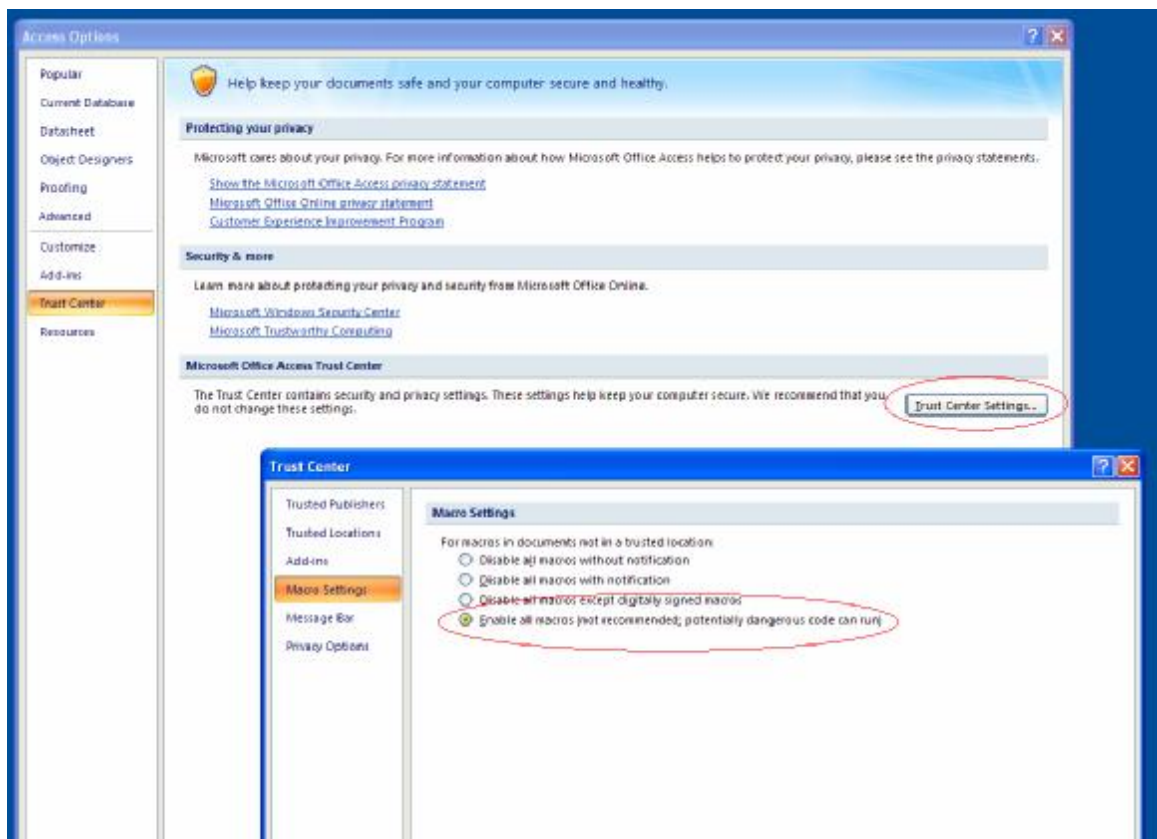


Microsoft Access 2003 Security Window.

#### 4.1.1 Setting up ASSETSonTRACK with Microsoft Access 2007

- o Open Microsoft Access via the Start Menu. Start -> All Programs -> Microsoft Office -> Microsoft Office Access 2007.
- o From the Office button select Access Options -> Trust Centre -> Trust Centre Settings.

Next, select Macro Settings and then *Enable all Macros*. A warning message may be displayed.



Microsoft Access 2007 Trust Centre.

## 5. Installing.

### 5.0 Installing ASSETSonTRACK®

ASSETSonTRACK must be installed either from CD or downloadable executable file. ASSETSonTRACK consists of 2 separate files – Data Server and User Interface.

#### 5.1 ASSETSonTRACK® Data Server

The ASSETSonTRACK Data Server is the central location for the storage of data associated with any component of the ASSETSonTRACK asset management system.

Only one instance of the data server should be installed per site. Multiple data servers may result in data being stored in different location, thus creating inconsistent and incorrect information, and confusion.

##### 5.1.1 Installing.

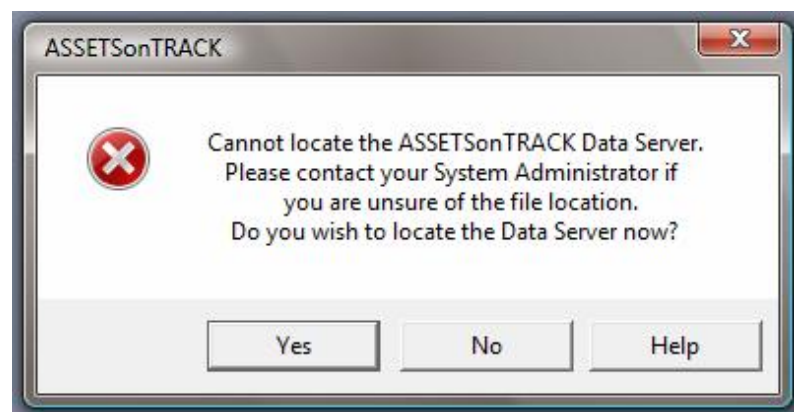
Run the file ASSETSonTRACK DataServer.exe

If a stand alone installation is to be utilized the default options and file locations can be used. If the system is to be installed over a network, the Data Server should be installed on a network server or the like. It should be installed in a location that can be accessed through the network by each computer that is required to use any component of the ASSETSonTRACK system. It is recommended a specific drive be mapped for the application.

Note: The Data Server can be relocated if a stand alone application is to be upgraded to a network installation. Data already entered into the system will then be available to all users.

##### 5.1.2 Accessing.

The ASSETSonTRACK Data Server is never directly accessed by the user. When opening any of the ASSETSonTRACK components, the file path to the Data Server is confirmed the data refreshed. If the data server cannot be located a message will be displayed asking if you want to locate the Data Server.



ASSETSonTRACK Data Server error message.

If this is the first time the program has been run on a PC, and you are confident you can locate the Data Server, select YES and navigate to the drive, folder and then select the ASSETSonTRACK Data Server.mdb Clicking Open will store the file location and refresh the data.

If the program has been used regularly and this is a message that does not usually appear, then rather than selecting YES, you should suspect the network is down, or the Data Server location has changed. In this case select NO and close the database. You should contact your network administrator and confirm the network is available before continuing.

The Data Server must be available and connected for any of the ASSETSonTRACK components to function.

### **5.1.3 Data Server Manager.**

The Data Server Manager can be accessed at any time from the menu bar under *File -> Data Server Manager*.

The current path to the Data Server will be displayed.

## **5.2 Installing ASSETSonTRACK® Database**

The ASSETSonTRACK Asset Management database is the central location for controlling asset additions, editing, asset repair management, maintenance as well as reporting and viewing asset history.

### **5.2.1 Installing.**

Run the file ASSETSonTRACK.exe

The ASSETSonTRACK database will be installed in the default location of C:\Predator Software\ASSETSonTRACK\ASSETSonTRACK.mdb

Start menu items and desktop shortcuts will automatically be created.

### **5.2.2 Trial Basis.**

ASSETSonTRACK is not free software. It is provided free on a trial basis only. This trial period lasts 90 day. If during the trial period you wish to purchase the ASSETSonTRACK Asset Management system payment must be received and registration code entered. Once the trial period expires ASSETSonTRACK cannot be used. If not registered, the program should be removed.

#### **5.2.2.1 Registering.**

Registering is carried out by entering an authentication key into the registration form. The Registration Form can be found on the Main Menu bar under Help -> Register. Authentication keys can be obtained from Predator Software and Mechanical.

### **5.2.2.2 Obtaining Authentication Key.**

To obtain your authentication key simply fill out the details in the registration details form. This form can be opened from the registration form. This form can be emailed, sent or faxed to Predator Software and Mechanical. Once payment has been received you will be emailed the authentication key. Enter this key into the authentication key field and press register.

## **6. Opening and Using Database.**

### **6.0 Opening and using.**

The ASSETSonTRACK database can be started by double clicking the desktop icon, or selecting the ASSETSonTRACK database from the start menu under Predator Software -> ASSETSonTRACK

### **6.1 Opening for the first time.**

On start up the file path to the Data Server is confirmed the data refreshed. If the Data Server cannot be located a message will be displayed asking if you want to locate the Data Server.

If this is the first time the program has been run on a PC, and you are confident you can locate the Data Server, select YES and navigate to the drive, folder and then select the ASSETSonTRACK Data Server.mdb Clicking Open will store the file location and refresh the data.

### **6.2 Continued Use.**

If the program has been used regularly and this is a message that does not usually appear, then rather than selecting YES, you should suspect the network is down, or the Data Server location has changed. In this case select NO and close the database. You should consult your network administrator and confirm the network is available before continuing.

The data server must be available and connected for any of the ASSETSonTRACK components to function.

## 7. Backing up the Database.

### 7.0 Overview.

One of the most important things to do involving any computer based system is to maintain recent backup copies of important files. This task is made easy in ASSETSonTRACK with the automated automatic backup system.

### 7.1 Backing Up.

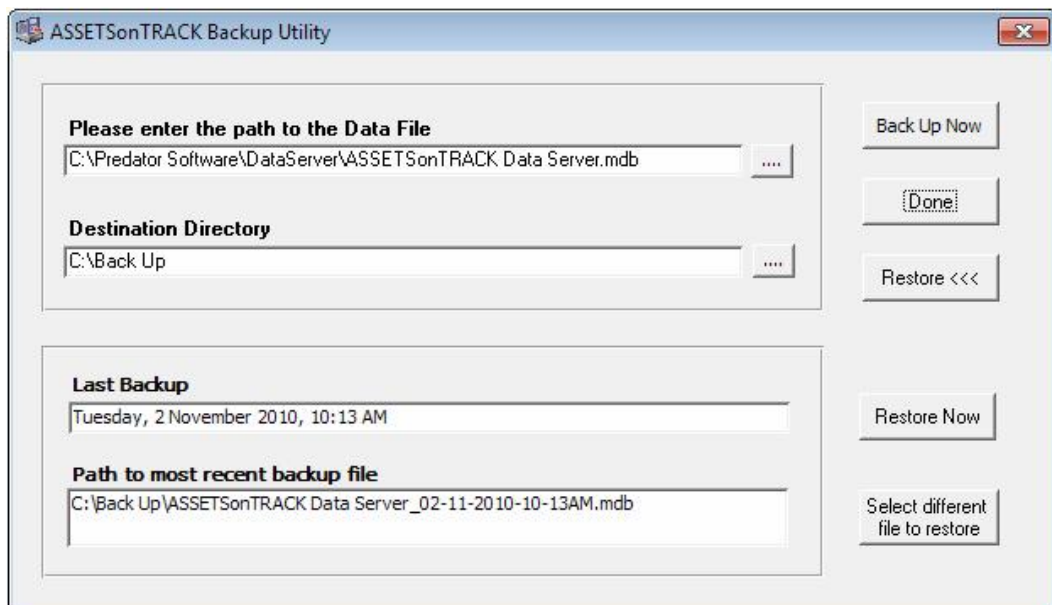
A back up utility has been integrated into ASSETSonTRACK and can be accessed from the Administrators main menu under File -> Back Up Database.

Once the back up form is opened you can select the path to the ASSETSonTRACK Data Server and the location the back up is to be saved. It is recommended that a different computer or server be selected to minimise the chance of loss if any hardware failure occurs.

If the *Back Up from this PC* is selected in the *Options* menu a message will pop up when ever the database is closed. This will allow you to back up the database automatically.

### 7.2 Restoring Data.

If a system error has occurred and you need to restore a backed up file, select the restore button. The form will expand showing the most recent backup file and the date. To restore this file as the active data server select restore. If a different file is required you can select it by pressing the *Select different file to restore* button.



## **8. Logging On.**

### **8.0 Overview.**

Once the database has loaded you may be required to Log On.

Log On requirements are determined by selecting the Log On check box in the Options menu. Refer to sections 9.1.7 "Start Up Options" on page 8 and section 19 "User Accounts" on page 37 of this users guide.

Choose your user name from the drop down list, enter your password then press Enter or the OK button. If your user account is not in the list you should contact your system administrator to determine if you have a valid account, and if that account is active.

## **9. Database Options.**

### **9.0 Overview.**

The following section describes in brief the different options available throughout the database. If a network system is in place, each PC with the ASSETSonTRACK Asset Management database can control their individual options. These options are explained in more detail in the relevant section.

### **9.1 Options.**

#### **9.1.1 Repair Management.**

Select this option if you want to track repairs carried out to assets. This option is used in conjunction with the User Repair Requisition Interface. Refer to section 12 "Repair Management" on page 18 of this users guide.

#### **9.1.2 Manage Repairs from this PC.**

Select this option if you wish to be notified when new repair requisitions are lodged remotely through the User Repair Requisition Interface (ASSETSonTRACK AddOn). A popup window will advise when new requisitions arrive. Note: ASSETSonTRACK must be running for notifications to be active. This option is only available when the database is using the Repair Management option detailed in section 9.1.1 above. Also refer to section 13.2 on page 23 of this users guide.

#### **9.1.3 Purchase Details / Depreciation.**

Select this option if you wish to include purchase details. Depreciation can also be tracked. A tab at the top of the Asset Register form will be visible. Refer to section 11.5 on page 17 of this users guide.

#### **9.1.4 Image of Asset.**

Select this option if you wish to have the ability of including an image of the asset. A tab at the top of the Asset Register form will be visible. Refer to section 11.4 on page 16 of this users guide.

#### **9.1.5 Programmed Maintenance.**

Select this option if you want the ability to control asset maintenance. A tab at the top of the Asset Register form will be visible. Refer to section 18 on page 31 of this users guide.

#### **9.1.6 Preview Reports before printing.**

By default all reports are previewed before printing. If you want reports to be sent directly to the default printer, de-select this option. Refer to section 20 on page 39 of this users guide.

#### **9.1.7 Use Log On Screen.**

Allows the system to be password protected at the log on stage. This also allows different user levels and different access levels to be implemented. In a stand alone situation, you may wish to bypass the Log On Screen. Refer to section 8 "Logging On" on page 7 and section 19 "User Accounts" on page 37 of this users guide.

#### **9.1.8 Back Up from this PC.**

This option is recommended to be selected on one PC only. It should be the PC that uses the system most. The back-up utility should be set up initially by a network administrator. Refer to section 7 "Backing up the Database" on page 6 of this users guide.

#### **9.1.9 Refresh Data Links.**

Once the system has been set up and you are confident the data server is connecting correctly consistently, this option can be de-selected to speed up initial loading.

## **10. Main Menu.**

### **10.0 Overview.**

The Main Menu is the control centre of the system. All information relating to an asset can be accessed from this form.

Select *Main Menus* from the menu bar at the top of the screen under File -> Main Menu.

### **10.1 Asset Register.**

The Asset Register is the main interface used to enter and view asset information. Full details are described in Section 11 "Asset Register" on page 11 of this users guide.

### **10.2 Repair Management.**

Repair requisitions are controlled via the Repair Management form. Full details are described in Section 12 "Repair Management" on page 18 of this users guide.

### **10.3 Outstanding Repairs.**

Outstanding repairs can quickly be viewed via the Outstanding Repairs form. By double clicking on a particular repair, the Repair Management form will open and display full details. Full details are described in Section 13 "Managing Repairs" on page 22 of this users guide.

### **10.4 Contractors.**

Pressing the Contractors button will open a popup window where you can select contractor details or repair history. Full details are described in Section 14 on page 24 of this users guide.

### **10.5 Database Options.**

Database options control the way ASSETSonTRACK is configured. Full details are described in Section 9 on page 7 of this users guide.

### **10.6 Asset Reports.**

Asset and Contractor reports can be configured and printed from this form. Full details are described in Section 15 on page 28 of this users guide.

### **10.7 Repair Reports.**

Repair reports are configured and printed from the Repair Reports form. Full details are described in Section 16 on page 29 of this users guide.

### **10.8 Maintenance Reports.**

Maintenance reports are configured and printed from the Maintenance reports form. Many different options and report formats are available. Full details are described in Section 17 on page 29 of this users guide.

### **10.9 Log Off.**

Use this button to log of from the system and return to the log on screen. This option is only available if the "Use LogOn Screen" option has been selected. Further details are described in Sections 8, 9 and 19 of this users guide.

### **10.10 User Accounts.**

User Account details are fully described in section 19 on page 37 of this users guide.

## 11. Asset Register.

### 11.0 Overview.

The Asset Register is the nerve centre of the system. All information relating to an asset can be accessed from this form.

Select *Asset Register* from the Main Menu or from the menu bar at the top of the screen under *Asset Management* -> *Asset Register*

### 11.1 Assets Tab.

#### 11.1.1 Searching and selecting Assets.

Assets can be selected from the dropdown box or by pressing the small button beside the dropdown box. The search form can also be opened from the main menu bar under *Asset Management* -> *Find Asset*. Once the search window is opened, a search can be quickly carried out by entering any known details of the asset. As details are entered into the search box, the asset list is automatically narrowed. View the asset details by either selecting the asset and pressing *View Asset Details* or simply double clicking on the asset in the list.

#### 11.1.2 Adding new Assets.

1. To add new assets press the *Add New Asset* button. A window will open allowing you to enter all relevant details of the asset. Asset numbers can be any combination of letters and/or numbers but must be unique. If a simple numbering system is to be implemented, the next available number can automatically be sourced by pressing the *Next No* button. A message box will display the next available number and ask you to confirm this number is to be used.
2. Once the asset number has been selected, enter a description of the asset in the description field. Be sure the description adequately describes the asset.
3. Select a location from the drop down box. If a location is not listed, location details can be viewed and added by clicking the button to the right of the location field.
4. Select the asset category the asset will belong to. Remember, the asset category sets the field name descriptor for the remaining fields in the asset details. If you are unsure of which category to select, click the small button beside the asset category field. A new window will open, allowing you to view all current categories and the field names. If no category suits the asset, a new category can be added by pressing the *Add New Category* button. A more detailed description relating to adding and editing asset categories can be found in section 21.2 "Reference Data on page 40 of this users guide.

5. Enter details of the asset. Remember to add as much information as possible. This will ensure future accuracy and ease of use of the system in the future. For example, enter as much detail off the name plate of a piece of equipment as possible (make, model, serial, date of purchase etc), then if this name plate get removed, worn or becomes illegible for some other reason, ordering replacement parts will be made easy as all required information will only be a few clicks away.
6. You can also include a preferred contractor to call in case of breakdown. These details will be available through the repair requisition interface, making details quickly and easily accessible. If this contractor has a user account set up, they can also log on and view details.

A more detailed description relating to contractor accounts can be found in section 19 "User Accounts" on page 37 of this users guide.

7. Be sure the Asset "In Service" check box is ticked. De-selecting the Asset "In Service" box will remove the asset from search lists throughout the database and the asset will become inactive.

Assets not marked as "In Service" are still able to be accessed through the main menu bar under Asset Management -> Decommissioned Assets

8. Include In User Lists. This option was added to allow administrators to control how many assets appear in the repair requisition interface lists. Experience showed that when a list of 1000's of assets is presented basic users are hesitant about using the system. It was also found that if an asset could not be found quickly any asset that appeared close would be selected, thus creating confusion and inaccuracies.

It is recommended that a list of assets be created that are simply and encompassing. Eg: Add a building or area as an asset, and then include this in the user list. Users can then simply select the building, enter the repair requisition details and submit the request. Repair requestions can be edited by system administrators and the correct asset can be selected a t later date if required.

A more detailed description can be found in section 12 "Repair Management" on page 18 of this users guide.

9. If the purchase details / depreciation option has been selected, form tabs allowing you to enter purchase details and depreciation data will be visible. Enter information as required.

### **11.1.3 Editing Asset details.**

To edit assets details press the *Edit Asset Detail* button. Edit any information as desired.

### **11.1.4 Ancillary Components.**

Ancillary components can be considered any spare part of an asset that does not warrant the creation of its own asset entry.

To view ancillary components, select an asset, press *Ancillary Components*. A new form will open displaying a list of parts associated with the selected asset. This list can be printed by pressing the *print* button on the ancillary components form.

To add a new component, click in the bottom field of the Part Name column. Once selected a drop down box will appear to allow you to select a components. If the components is not listed they must be first added to the database. Refer to section 10.1.4.1 Adding Ancillary Components.

The ancillary components form displays a list of all components. To view which assets use a particular component, select the component from the list and press *Assets using this Part*. A new form will open with the relevant details. This information can also be printed by clicking the Print button on the Ancillary Part Usage form.

#### **11.1.4.1 Adding Ancillary Components.**

To add a new component, use the Ancillary Parts forms. This is opened by either double clicking in the Parts Name box on the Ancillary Components form (as described above) or by selecting *Asset Management -> Ancillary Parts* or *Spare Parts -> Ancillary Parts* from the main menu bar at the top of the screen. Parts can then be added by pressing *Add New* button and entering all necessary details. If a preferred supplier is not listed, they must be added through the Contractors Information form.

Details on adding Contractors can be found in section 14 "Contractors" on page 25 of this users guide.

### **11.1.5 Decommissioned Assets.**

De-selecting the Asset "In Service" box will remove the asset from search lists throughout the database and the asset will become inactive.

Assets not marked as "In Service" are still able to be accessed through the main menu bar under *Asset Management -> Decommissioned Assets*.

Assets should be Decommissioned rather than deleted to retain a history of that asset for future reference.

## **11.2 Repair History Tab.**

### **11.2.1 Overview.**

The repair history quickly shows all repair requisitions lodged against the selected asset. The most recent requisition will be listed at the top, with other requisitions listed in descending date order. Details cannot be edited in this

window. Full details can quickly be viewed and edited by double clicking on any requisition. The repair management window will open displaying the selected repair requisition. Printing the history of the asset is quickly done by pressing the *Print Repair History* button. You can then select whether to print a summary, or more detailed report. Refer to section 12 "Repair Management" on page 18 of this users guide.

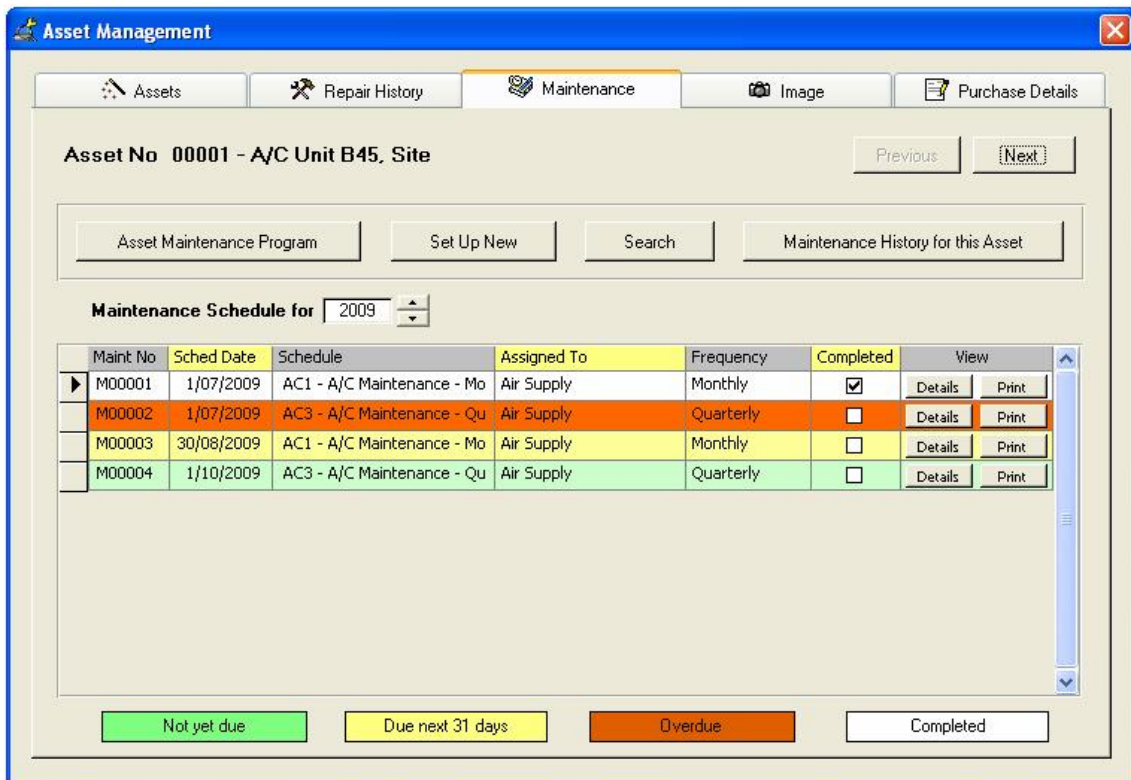
### 11.3 Maintenance Tab.

#### 11.3.1 Overview.

If the programmed maintenance option has been selected in the Options menu, the Maintenance tab will be visible on the Asset Register.

Setting up maintenance schedules will be the most time consuming part of the system, but once done, and if done correctly, will prove to be one of the greatest time features of the system in the future.

Maintenance details are colour coded to allow you to quickly view the maintenance status of any asset.



Maintenance tab on the Asset Register showing the status of maintenance schedules.

### **11.3.2 Asset Maintenance Program.**

To view the asset maintenance program set up for any asset press the *Asset Maintenance Program* button. A form will open displaying maintenance schedules assigned to the asset. Details can be edited from here by pressing the associated button under the Edit column. The asset maintenance program can also be printed from the Asset Maintenance Program form.

### **11.3.3 Setting up new Maintenance Schedules.**

Setting up new maintenance schedules is detailed fully in the Scheduled Maintenance section of this guide. Refer to section 18 "Scheduled Maintenance Program" on page 31 of this users guide.

### **11.3.4 Searching.**

To search for a scheduled maintenance entry, *press* the *search* button. This search form is also available from the main menu bar under *Maintenance -> Search for Maintenance*. The Maintenance Search form will open. If the maintenance number is known it can be selected from the list. You can narrow the search list by entering information directly into the search field. As you type the list is refreshed, narrowing the results. When the maintenance is found highlight it in the search box list. Once highlighted, by pressing *Asset Information* the Asset Register will open and the selected maintenance will be highlighted. By pressing the *Maintenance Details* button the maintenance form will open and maintenance details can be updated.

Updating maintenance schedules and details is covered in more detail in the Scheduled Maintenance section of this guide.

### **11.3.5 Maintenance History.**

Asset maintenance history can be printed by pressing the *Maintenance History for this Asset* button. A pop up window allows all history to be selected or history for an individual year.

## 11.4 Image Tab.

### 11.4.1 Overview.

Adding an image to the database can be done through the Image tab on the Asset Register. Images are not directly embedded into the database, but the path to the image files is stored and the image loaded as required. In a network installation consideration should be given to the location of the folder or folders containing images. Incorrect storage will render images available from some PC's and not on others. In this situation it is recommended a folder be created on the same network location that holds the ASSETSonTRACK Data Server. Most popular image formats are supported.

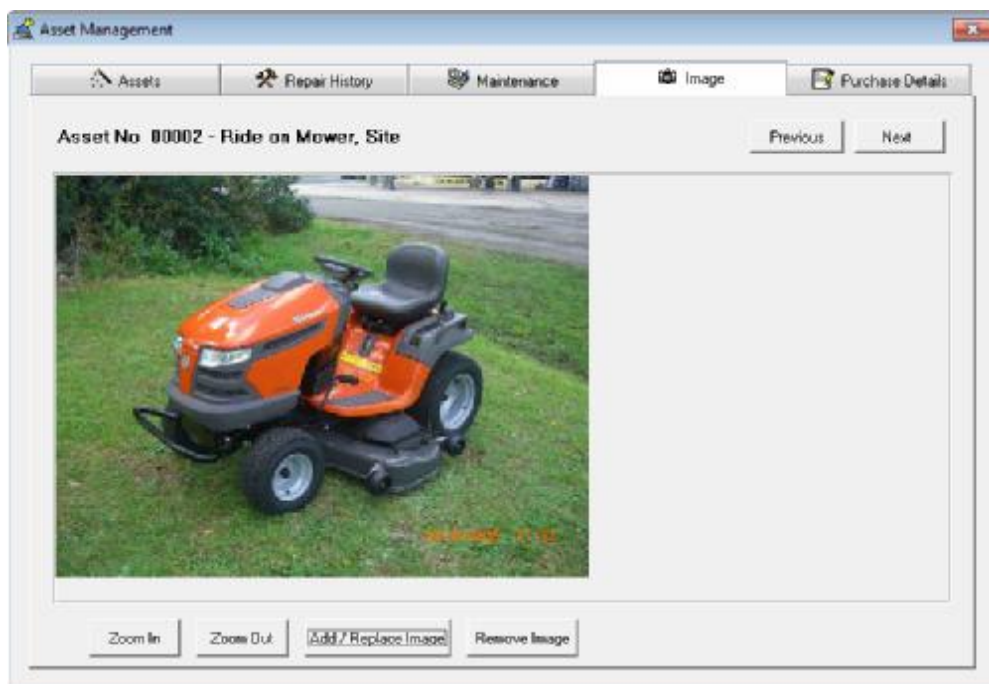


Image tab on the Asset Management form.

### 11.4.2 Adding / Replacing Images.

To add or replace an image press the Add/Replace Image button. A form will open allowing you to navigate to the image stored on your system. Once you have selected the image press open. This will load the image into ASSETSonTRACK.

### 11.4.3 Removing Images.

To remove an image, press the remove image button. You will be prompted to confirm your selection.

## 11.5 Purchase Details Tab.

### 11.5.1 Overview.

If the purchase details / depreciation option has been selected in the options menu, the Purchase Details tab will be visible on the Asset Register. Purchase details and depreciation information can be viewed on this tab. Editing this information is done through the asset edit form that can be selected from the Assets tab on the Asset Register.

## 11.6 Asset Management.

### 11.6.1 Batch updating of Asset Details.

Asset details and quickly and easily be updated for a number of assets at one time through the Asset Batch Update form. This can be a real time saver if many asset details need to be updated, such as a new contractor is engaged to maintain all kitchen equipment, but currently each asset has a different contractor listed as the preferred contact.

The Batch Update form can be accessed via the menu under Asset Management -> Batch Asset Detail Updating.

Once opened, select the assets you require to be updated, select the new criteria from the drop down boxes then press *Update Asset Details*.

Note: If any drop down box is left blank no update will be carried out for that field.

Update Asset Details

Use this form to quickly update details for one or multiple assets.

Click column heading to sort.

Asset No.	Asset Description	Category	Location	Contractor	
00001	A/C Unit B45	Mec A/C	Admins	Administration Building	Air Supply
00002	Roll on Heater	SCC	Site	All Areas	INHOUSE
00003	Smoke Alarm	BLO	Site	All Areas	INHOUSE

Select the Asset/s you want to update, then select an entry from the fields below you want to alter.

Category:

Location:

Contractor:

Batch Asset Updating form.

## 12. Repair Management.

### 12.1 Overview.

The repair management system will be available if the Repair Management option is checked in the options form. Once this option is selected the *Repair Management*, *Outstanding Repairs* and *Repair Reports* buttons on the main menu will be active.

To open the Repair Management form click, the *Repair Management* button on the main menu or select *Repair Management -> Repair Management* from the main menu bar.

The Asset Repair Management form is used to view, update and print repair requisition details. Once again, adding more detail at this stage will build a better history of the asset and will contribute to decisions over the reliability and life expectancy.

### 12.2 Form Fields.

Following is a brief description of each field and button on the repair management form.

#### 12.2.1 Date Reported.

This date is automatically generated when a request is made.

#### 12.2.2 Logged By.

Details of the user that logged the requisition. This information can then be used to consult the correct person when arranging inspection or repair.

#### 12.2.3 Requisition Details.

Requisition details. Include as much details as possible as to the nature of the request.

#### 12.2.4 Preferred Contractor.

If a preferred contractor has been assigned to an asset this field will automatically add the contractor. If a different contractor is to be assigned to the repair, select them from the list. If a contractor is not listed, they must first be added through the Contractor information form. Adding new contractors is described in section 14.1.1 "Adding new Contractors" on page 25 of this users guide.

#### 12.2.5 Repair Status.

Displays the current status of the requisition. This will help other users keep up to date on the progress of the repair. To edit codes, or to add extra codes, click the small button to the right of the field.

#### **12.2.6 Date Repaired.**

Enter the date the repair was carried out. This will allow you to observe the lag time between when the repair requisition was lodged and when the repair was completed. Poor contractor response times can easily be documented from this information.

#### **12.2.7 Order No.**

If your company uses a different order system the reference number can be inserted here.

#### **12.2.8 Repair Time.**

Enter the time taken to carry out this requisition. This information can also be used to assess Asset reliability and projected longevity.

#### **12.2.9 Repair Cost.**

If known, add the cost of the repair. Adding the repair cost will allow you to track how much is spent repairing the asset. This will contribute to decisions over the reliability and life expectancy.

#### **12.2.10 Follow up Action.**

If any further action is required or improvements can be implemented, enter details here.

#### **12.2.11 OHS Issues.**

If the requisition is related to an OHS issue, check the OHS Issue box. A report can be generated showing any regular or ongoing OHS issues, allowing improvements to be quickly instigated. The OHS report form can be accessed from the top menu bar under Repair Management -> OHS Reports. A pop up window allows you to select a time frame and / or a specific asset.

#### **12.2.12 Acknowledged.**

If the Repair Requisition User Interface is used in a network installation, a pop up form will advise when new requisitions arrive. This list will show all unacknowledged requisition. Acknowledging the requisition will remove it from the list. For further details refer to section 13 "Managing Repair" on page 22 of this users guide.

#### **12.2.13 Completed.**

Check the box once the repair is completed.

## **12.3 Form Buttons.**

### **12.3.1 View New Requisitions.**

Opens a form showing unacknowledged requests. This information is used when the ASSETsonTRACK Repair Requisition User Interface is installed. See further information in section 13 "Managing Repairs" on page 22 of this users guide.

### **12.3.2 Repair Times/Repair Details.**

Switches the display to allow a more detailed log of repair details to be updated. Once the Repair Details section is displayed, specific contractors can be selected, repair dates can be added and visit details can be inserted. This information can be used to track a repair that may required several different contractors, or several visits to repair. Adding this information will easily allow everybody to see exactly the progress of the repair.

#### **12.3.2.1 Employee / Contractor Field.**

Select the repairer from the list. If a contractor is not listed, they must first be added through the Contractor information form. Adding new contractors is described in the contractors section of this guide.

#### **12.3.2.2 Repair Date.**

Add the repair date. Double clicking in this field will open a pop up calendar to allow you to easily pick the date.

#### **12.3.2.3 Repair Details.**

Add repair details here. Double click to open a pop up window to add extra detail.

#### **12.3.2.4 Start, Finish & Hours Fields.**

If desired, start and finish times can be entered, as well as actual hours. These hours will be summed and added to the repair time field on the main form is desired. A popup message will ask if you want to update these details when switching back to the repair details.

### **12.3.3 Add New Repair.**

Opens the administrator repair requisition form. Adding a new requisition is described in more detail in section 13.3 on page 24 of this users guide.

#### **12.3.4 Print.**

Opens a pop up window to allow you to select either a repair requestion or repair review.

The requisition is designed to be handed to a contractor for reference. It lists the asset details, location, fault as well as space for notes.

The repair review is designed as an internal document used to assess the assets performance.

#### **12.3.5 Issue Order No.**

Optional. Adds the current requisition number to the Order No field on the form. If a separate order number system is used, the number can be entered directly into the order number field.

#### **12.3.6 Select Correct Asset.**

If a requisition has been lodged, and the user has selected the incorrect asset, or selected the building as indicated earlier in this guide, then the correct asset can be selected. It is important to lodge requisitions against the correct asset to allow an accurate history to be built.

#### **12.3.7 Delete Requisition.**

Deletes the current requisition. If a requisition has been doubled up, or requested by two different users, one can be deleted.

### **12.4 Searching for Repair Requisitions.**

Searching for a requisition can be done in several ways.

- By selecting the requisition from the drop down box on the repair management form.
- By clicking the small button to the right of the drop down search box.
- By selecting *Repair Management -> Search for Repair* from the main menu bar.

Either of the last two options will open the repair search form. From the search form you can enter known information into the search field. As you type the repair list will be updated. Once the repair is found, details can be viewed by double clicking the repair in the list box. If you are unsure of repair details you can filter data by selecting the Filtered radio button and selecting a time period from the drop down box.

## 13. Managing Repairs.

### 13.0 Overview.

Repair Management will be available on the Main Menu if the Repair Management option is checked in the Options form. Full details on the Repair Management form can be found in section 11 of this user guide.

### 13.1 Viewing and Controlling.

Repair requisitions can be broken up into two different sections.

- Unacknowledged Repairs.
- Outstanding Repairs.

#### 13.1.1 Unacknowledged Requisitions.

Unacknowledged requisitions are repair requisitions that have been submitted on the system but have not been acknowledged as being received by the maintenance department or person in control of repair management. They can be viewed in several ways.

- ◆ By selecting *Repair Management – Unacknowledged Requisitions* from the main menu bar at the top of the screen.
- ◆ By pressing the *View New Recs* button on the Repair Management form.
- ◆ By pressing *Show* when the popup window is displayed. For further details refer to section 14.1.2.3 in this guide.

Repair No	Date	Asset No	Description	Rec Details	Logged by	Ack	OHS
0002	8/08/2009	00002	Ride on Mower	Catcher protector badly cracked.	D.LILLIE	<input type="checkbox"/>	<input checked="" type="checkbox"/>
0003	8/08/2009	00003	Smoke Alarms	Beeping in main corridor	B.A.PAYNE	<input type="checkbox"/>	<input type="checkbox"/>
0004	8/08/2009	00001	A/C Unit B45	Bad smell coming from vents	R.BEGGS	<input type="checkbox"/>	<input type="checkbox"/>

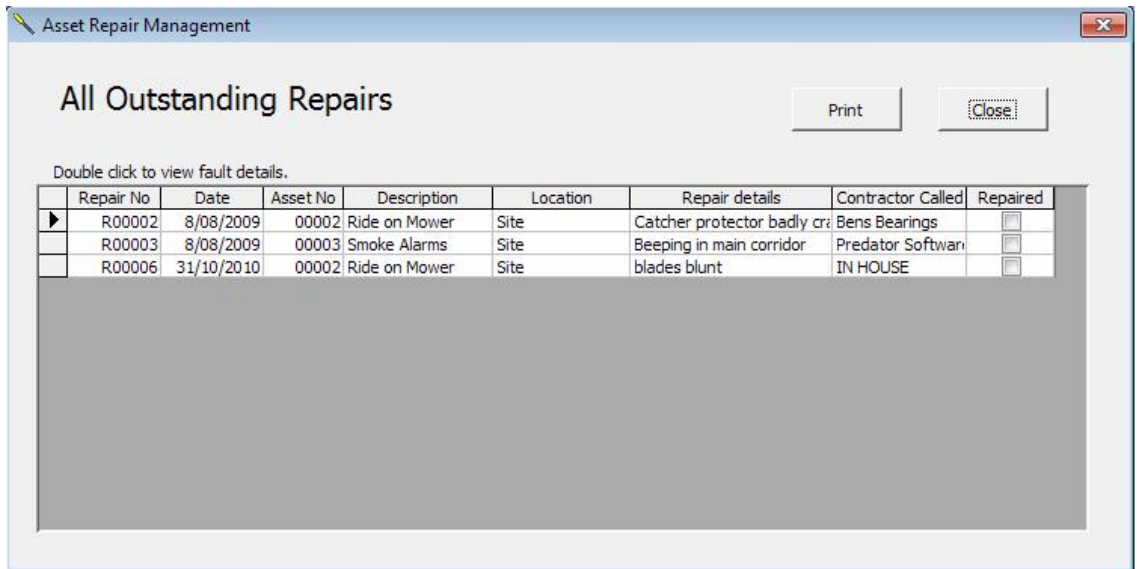
Unacknowledged Repair Requisition form.

#### 13.1.2 Outstanding Requisitions.

Outstanding requisitions can be considered as requisitions that have been received and acknowledged and repairs arranged. Once acknowledged, the repair status should be updated and any follow up action taken entered.

To show all outstanding repairs click the Outstanding Repairs button on the Main Menu. This will open a form that displays all outstanding requisitions. This form can also be opened from the main menu under *Repair Management -> Outstanding Repairs*.

To view an individual requisition, simply double click on the line in question. Requisitions can be marked as complete from the Outstanding Repairs form. A message will appear asking to confirm your selection. If you are sure you have selected the correct requisition, press yes.



Outstanding Repair Requisition form.

### 13.2 Requisition Pop Up Screen.

While ASSETsonTRACK is running the program will routinely check for new requisitions. A pop up window will show details of unacknowledged repair requisitions. Clicking on the details area (highlighted in gold) will allow you to scroll through request details quickly without having to open the repair management form.



Repair requisition pop up notification form.

### **13.2.1 Dismiss Requisitions.**

Click *Dismiss* remove the pop up form from the screen. Window will remain hidden until another requisition is lodged. Requisition will remain unacknowledged.

### **13.2.2 Show Requisitions.**

By clicking the *Show* button a form will open showing unacknowledged repair requisitions. Refer to section 12.1.1 of this guide for further information.

## **13.3 Adding a new Requisition.**

To add a new repair requisition either select *Add New Repair* from the Repair Management form, or by selecting Repair Management -> New Repair Requisition from the main menu bar.

Select the asset from the dropdown list then enter the requisition details. If a contractor has been assigned to maintain the asset their details will automatically appear in the Contractor Called field. Once all details have been entered press the Enter Requisition button.

## **13.4 Printing.**

Lists of Unacknowledged, Outstanding or individual repairs can be printed by pressing the *Print* button on the related form. Printing can also be performed from the Repair Reports form available from the Main Menu.

## **14. Contractors.**

### **14.0 Overview.**

Contractors are referred to throughout the database in several ways.

- As contracting companies that supply maintenance throughout your organisation.
- As contracting companies that supply breakdown and emergency services.
- As preferred suppliers, used to supply goods to your organisation.

Contractors can be viewed by selecting Contractors from the Main Menu. A pop up form will open allowing you to select either contractor information, or contractor repair history.

Contractors can also be viewed by selecting *Asset Management -> Contractors -> Current Contractors*.

### **14.1 Contractor Information.**

Contractors should be considered companies who supply goods and services to the organisation. Employees of the company can also be added on the contractors form.

#### **14.1.1 Adding.**

To add a new contracting company press the *Add New Contractor* button. Add as much detail as possible.

#### **14.1.2 Selecting Contractor Types.**

The various check boxes are used to filter the contractor lists throughout the database. Select the check box or boxes that reflect the contractors use.

##### **14.1.2.1 Active Contractors.**

For a contractor to appear in any list, they must be active. If a contractor is no longer used by your organization, if you delete them from the database you will lose any history created. By de-selecting them as an Active Contractor they will simply be removed from the various contractor lists used throughout the database. Eg: when adding Repair requisitions etc.

##### **14.1.2.2 Maintenance Contractors.**

If the selected contractor is to be used for maintenance also select the Maintenance check box. Once again this information is used to filter selection lists.

#### **14.1.2.3 Preferred Contractors.**

Selecting the Preferred Contractor check box will also allow the contractor to appear in the various drop down boxes related to servicing (repairs and repair requisitions) throughout the database. Many organizations mark a contractor as Preferred when they have supplied up-to-date Public Liability and Work Cover Insurance details,

#### **14.1.2.4 Other Contractors.**

Other contractors are contractors that may be used as phone contacts, off site suppliers or service agents. They usually perform no service on site, but may be called on to provide incidentals such as office supplies or the like.

#### **14.1.3 Contracts.**

If contracts are used in your organisation start and finish dates can be inserted. Contacts should be controlled from the ASSETSonTRACK Contractor Information Add-in.

#### **14.1.4 Employees and Services Offered.**

The Employees and Services offered tab on the Contractors form allows you to add even more detail the system.

##### **14.1.4.1 Service Supplied.**

Add the services the contractor offers to the list. Services must be included in the list before they can be selected. To edit this list double click in the drop down box under the service heading.

The Services Supplied list can be printed by clicking the *Printing* button on the contractors form, then select the *Contractors by Services Offered* option, then click print.

##### **14.1.4.2 Employees.**

Contractor employees can be added and information tracked. Employee information is controlled mainly through the ASSETSonTRACK User Information Add-In but details can be added and viewed from the Contractors form if desired. Details such as Inductions, Police Check and OHS training history can be viewed and updated.

#### **14.1.4.3 Adding an Employee.**

To add employees to the database, firstly open the Contractors form and select the Employees and Services Offered tab.

Press the Add Employee. A pop up form will open allowing you to add the employee. Select the company and add employee details. If the contracting company is not listed, close the Add Employee form and add the contractor to the contractors list as set out earlier in this guide.

#### **14.1.5 Printing.**

Contractor information can be printed by pressing the *Print* button on the contractors form. A pop up form will open allowing you to select from many predefined reports.

Contractor information can also be printed from the Asset Reports form accessed from the main menu. A more detailed description can be found in the Asset Reports section of this guide.

### **14.2 Repair History.**

#### **14.2.1 Selecting a Contractors.**

Contractor repair history can be viewed by selecting *Contractors -> Repair History* from the main menu or *Repair Management -> History by Repairer* from the main menu bar. A pop up form will open allowing you to select a contractor then viewing either All Repairs or Outstanding Repairs.

#### **14.2.2 All Repairs.**

By selecting a contractor and then pressing *All Repairs* another form will open displaying all repairs carried out by the selected contractor. Individual repairs can be viewed by double clicking on the repair line in question. The list can be printed by pressing the *Print* button.

#### **14.2.3 Outstanding Repairs.**

By selecting a contractor and then pressing *Outstanding Repairs* another form will open displaying all outstanding repairs assigned to selected contractor. Individual repairs can be viewed by double clicking on the repair line in question. The list can be printed by pressing the *Print* button.

## 15. Asset Reports.

### 15.1 Overview.

The Asset Reports form can be opened from the Main Menu or from the Asset Reports button on the Asset Register form.

### 15.2 Asset Reports.

Asset reports can be printed by selecting the Asset Register radio button. To select a group of assets or an individual asset select the required criteria under Asset Options.

Pressing print will display a pop up window allowing you to select a detailed or summary format.

#### 15.2.1 All Assets.

Pressing *Print* will open a pop up form and allow you to print a complete list of assets as a full report, summarized report, or a summarized list of depreciable assets.

#### 15.2.2 Assets by Category.

Selecting the *Assets by Category* radio button will allow a further break up of the asset register. Once the radio button has been selected a drop down box will appear showing a list of categories in the system. Selecting (All) will allow you to print all assets, but grouped into their category.

Pressing *Print* will open a pop up form and allow you to print a complete list of assets as a full report, summarized report, or a summarized list of depreciable assets grouped in their category.

#### 15.2.3 Assets by Location.

Selecting the *Assets by Location* radio button will allow a further break up of the asset register. Once the radio button has been selected a drop down box will appear showing a list of locations in the system. Selecting (All) will allow you to print all assets, but grouped into their location.

Pressing *Print* will open a pop up form and allow you to print a complete list of assets as a full report, summarized report, or a summarized list of depreciable assets grouped in their location.

#### 15.2.4 Assets by Contractor.

Selecting the *Assets by Contractor* radio button will allow you to print assets that are serviced by a particular contractor. Selecting (All) will allow you to print all associated assets, but grouped by contractor. If an asset has not had a contractor assigned to it, it will appear at the start of the list.

Pressing *Print* will open a pop up form and allow you to print a complete list of assets as a full report, summarized report, or a summarized list of depreciable assets grouped in their category.

#### **15.2.5 Specific Asset.**

Selecting the *Specific Asset* radio button will allow you to print details of an individual asset. Select the asset from the drop down box and click print.

### **15.3 Contractor Reports.**

Contractor reports are simple spreadsheet style lists of contractors listed in the contractors section of the database.

Selecting the *All Contractors* radio button will display a drop down box allowing you to filter contractor information if desired.

Select the appropriate option and click *print*.

## **16. Repair Reports.**

### **16.1 Overview.**

The Repair Reports form can be opened from the Main Menu or from the Top menu under Repair Management -> Repair Reports.

Select the require criteria and press print. Reports are available in detailed or graphical formats.

Note: Not all criteria are available for graphical format reports.

## **17. Maintenance Reports.**

### **17.1 Overview.**

The maintenance reports form can be accessed from the main menu under Maintenance Reports or from the main menu bar under *Maintenance* -> *Maintenance Reports*.

After opening the maintenance report form you can pick to print maintenance work orders or maintenance history.

### **17.2 Maintenance Report Formats.**

Maintenance reports are able to be printed in the following formats:

- Maintenance Work Orders.  
Maintenance work orders are designed to be filled in by maintenance contractors and filed for future reference.

- **Maintenance Summary.**  
A Maintenance Summary is a spreadsheet style report.
- **Maintenance History.**  
Maintenance history can be viewed from the maintenance history form. This form can be opened by pressing *Maintenance History* from the Maintenance Reports form or by selecting *Maintenance -> Maintenance History*.

### **17.3 Generating Maintenance Reports.**

Maintenance reports are printed for specific time periods. Simply select the starting date and the period of the report. Reports can also be filtered using the radio buttons to select from the different options available.

Pressing *Print* will open a pop up form allowing you to select work orders or a summary.

### **17.4 Maintenance History.**

Maintenance history can be viewed from the maintenance history form. This form can be opened by pressing *Maintenance History* from the Maintenance Reports form or by selecting *Maintenance -> Maintenance History*.

Once the Maintenance History form is open you can select the date range, report filter and the select whether to print the report in either data or graphical format.

## **18. Schedule Maintenance Program.**

### **18.1 Overview.**

One of the most time consuming and involved tasks in the ASSETSonTRACK asset management system is setting up maintenance programs. Setting up a maintenance program can be broken up into several parts.

- Predefining maintenance schedules.
- Decide on a frequency for this schedule.
- Assign this schedule to an asset.
- Select a contractor to carry out the maintenance.

Once done, and if done correctly, will prove to be one of the greatest features of the system.

### **18.2 Maintenance Schedules.**

Maintenance schedules are a list of instruction to carry out when maintenance is performed. Many schedules are predefined in the database and can be used as maintenance schedules or as example to create your own. The amount and scope of these schedules is limited only by your imagination.

### **18.3 Maintenance Schedule Form.**

The maintenance schedule form displays details of all current schedules held in the database. From here schedules can be added (as above), deleted, edited, printed or previewed.

#### **18.3.1 Maintenance Schedule Form Buttons.**

##### **18.3.1.1 New Schedule.**

This button is used to add new schedules to the database as set out in Section 18.4 of this guide.

##### **18.3.1.2 Delete Schedule.**

This button is used to delete a schedule. Note: Deleting a schedule should only be carried out when you are sure this schedule is not use. Deleting a schedule that is in use will raise an error to alert you that the schedule is in use. In this case the schedule can not be deleted.

##### **18.3.1.3 Print Schedule Code List.**

Prints a list of the codes to hang on the wall or keep handy to refer to when setting up maintenance programs.

#### **18.3.1.4 Print All Schedules.**

Prints all details of all schedules. These can then be stored in an on site folder and used for photocopying if required.

#### **18.3.1.5 Preview Sheet Layout.**

Displays a print preview of the currently selected schedule as it would appear when printed during the maintenance program. Details can be observed to see if it is correctly formatted, and all required details covered.

### **18.4 Predefining Maintenance Schedules.**

To create or predefine a new maintenance schedule:

- Open the Maintenance Schedule form by selecting *Maintenance -> Maintenance Schedules* from the main menu bar.
- Press *New Schedule* button. A new record will be created and the focus will be set to the schedule code field. Enter a code that will be easily recognised throughout the database. Give the schedule a name. It should relate to the code and describe briefly what will be required.
- Select a recommended frequency from the drop down box. If the frequency is not listed, double clicking in the frequency field will open the scheduled frequencies form where you can add frequencies as required. Enter the number of days the frequency corresponds to. This number is used to calculate new maintenance dates. This frequency is used as a base when schedule is added to an asset. This can be changed at any time.
- Enter the instructions to be carried out. Double clicking in the instruction field will open a schedule description form that displays the information line for line as it will be printed.

### **18.5 Setting up Maintenance Program.**

Once you have set up maintenance schedules you are ready to assign these to assets. There are two ways to set up maintenance programs. Individually or by groups in a batch update process.

#### **18.5.1 Individual Set up.**

- Select the asset from the asset register. On the maintenance tab press the *Set Up New* button. The Adding New Maintenance Schedule form will open.
- Select a predefined schedule from the drop down box.

- Assign a contractor to carry out the maintenance.
- Assign a frequency. If a frequency has been assigned to the schedule, it will be automatically entered when the predefined schedule is selected. A different frequency can be selected if desired.
- Enter a commencement date. Clicking the small calendar icon will open a calendar that allows you to select a date.
- Press *Update* to add this set up to the maintenance program.

Note: Multiple schedules can be added to a single asset.

### **18.5.2 Batch Set up.**

- Select *Maintenance -> Batch Maintenance Set up* from the main menu bar. The Batch Set up form will open.
- Select the asset or assets to be set up.
- Select a predefined schedule from the drop down box.
- Assign a contractor to carry out the maintenance.
- Assign a frequency. If a frequency has been assigned to the schedule, it will be automatically entered when the predefined schedule is selected. A different frequency can be selected if desired.
- Enter a commencement date. Clicking the small calendar icon will open a calendar that allows you to select a date.
- Press *Update Maintenance Program* to add this set up to the maintenance program.

### **18.6 Editing and Updating Maintenance Program.**

Editing and updating a maintenance program is done on the View / Edit Maintenance Details form. This form can be opened in two ways.

- 1) By selecting the maintenance from the maintenance tab on the asset register or:
- 2) By selecting *Maintenance -> Search for Maintenance*. You can then select the maintenance and pressing the *Maintenance Details* button.

### **18.6.1 Editing a Maintenance Program.**

- Open the View / Edit Maintenance Details form as described above.
- Details can be updated by selecting different data from the drop down boxes as desired.
- To delete the maintenance press the *Delete* button. Once deleted, all details of this maintenance are lost
- Click the Update button to save changes.

### **18.6.2 Updating a Maintenance Program.**

- Open the View / Edit Maintenance Details form as described above.
- An individual work order can be printed by selecting *Print Work Order*.
- If the maintenance has been complete click the *Completed* check box and add the date the maintenance took place in the date field.
- Fill in any details relating to issues found during the maintenance or things that require attention, but can wait until the next maintenance. Once again, adding more detail at this stage will build a better history of the asset and can contribute to decisions over the reliability and life expectancy.
- If the maintenance has been completed, the *Print Job Review* button will be active and a job review can be printed.
- Click the Update button to save changes.

## **18.7 Printing Maintenance Programs.**

### **18.7.1 Overview.**

The printing of the Maintenance Program can take 2 forms:

- Maintenance Work Orders.
- Maintenance Reviews.

#### **18.7.1.1 Maintenance Work Orders.**

Maintenance Work Orders are intended to be printed and handed to a contractor before work starts. Maintenance Work Orders list the Asset, Location, Asset Schedule and details of work to be carried out. A section is

also provided to enter any comments or recommendations by the contractor, and a section for signings.

#### **18.7.1.2 Maintenance Reviews.**

Maintenance Reviews are designed as a record of work carried out. Once maintenance has been completed any comments or recommendations can be entered for future reference.

#### **18.7.2 Printing.**

Printing Maintenance Work Orders and Job Reviews can be achieved in many ways.

- By selecting *Maintenance* -> *Maintenance Reports* from the main menu bar.
- By selecting Print on the maintenance tab on the asset register beside the maintenance in question.
- By selecting *Maintenance* -> *Maintenance History* from the main menu bar.
- By selecting Maintenance History for this Asset on the maintenance tab on the asset register.
- By selecting *Maintenance Reports* from the main menu.

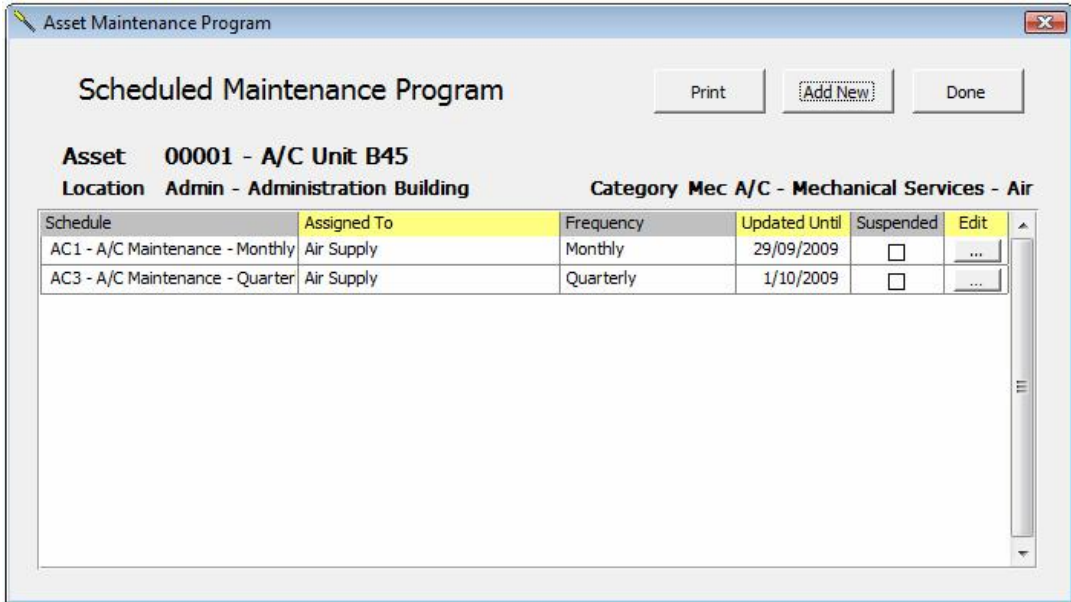
In each instance a second window will open offering further printing options.

Maintenance history can be printed in either data format, or on graphical format, showing maintenance totals for a month and the showing any outstanding.

Printing maintenance reports, maintenance history is covered in more detail in the Maintenance Reports section of this guide.

### 18.8 Reviewing Asset Maintenance Program.

A current maintenance program for any asset can view by selecting the asset on the asset register form. On the maintenance tab press the **Asset Maintenance Program** button.



Schedule Maintenance Program form.

Program details will be displayed. This list can be printed or edited. New schedules can also be added from here. In the example above the air conditioning unit has two schedules. Each month a new monthly maintenance will automatically be raised, and each quarter a monthly and quarterly maintenance will be raised.

## 19. User Accounts.

### 19.0 Overview.

User Accounts are a feature that is available throughout the ASSETSonTRACK system to allow you to control access to the system and set permissions of users that are granted access. Each ASSETSonTRACK database has the option to either use the log-on system, or simply bypass log-on, and open in administrator mode.

### 19.1 Access Levels.

- *Administrator.* Full access to the system is granted.
- *Manager.* Full access except the ability to change database options or edit user accounts.
- *User.* Limited access. Only provides the user with the ability to add repair requests and to view their requisition history.
- *Contractor.* When a contractor is granted user account, they are able to view any outstanding repair requisitions they may have. These requisitions can be viewed in detail by double clicking on any requisition. From there, full details can be viewed and printed. The requisition printout will detail the asset to be repaired, who logged the request, requisition order no, as well as space for the contractor to fill in any repair details or follow up actions required. These details can also be entered directly into the system by the contractor to allow immediate feed back will then be available.
- *Guest.* A guest account allows full access to view and print information. Asset details, repair details etc can be viewed but changes are not allowed.

User account control must be performed by someone already logged onto the system as an administrator.

### 19.2 Adding a new Account.

1. Select *User Accounts* from the main menu, then select *Add*.
2. Enter a user name. This user name will appear in the drop down lists on the log-on screen. You will be notified if this user name is unavailable. In this case, select a different user name. Enter and confirm a user password. Enter other details as required.
3. Select the User Group. The user group will determine the access level the user will have to the system. If the "Contractor" user group is selected an extra drop-down box will appear that will allow you to associate the contractor with a Contractor Company. This company must already be listed in the contractor details section of the system.

4. Click on "Create Account". If any details are missing or password has been incorrectly entered, a message will be displayed. Once all details are correct the account will be created and will appear in the active accounts list.

### **19.3 Editing an Account.**

1. Select the account to edit. To edit the account select *Edit*.
2. Make any changes required. To change a user password select *Change Password*. Enter the current password, then enter and confirm the new password.
3. Select Update to save changes.

### **19.4 Suspending an Account.**

Suspended accounts can be thought of as deleted accounts, but unlike deleted accounts user information is still stored in the system, but removed from the drop down list in the log-on screen. ASSETSonTRACK encourages the use of suspended accounts rather than deleting them. This allows accurate history to be available at any time in the future. If an account is deleted, this history would be lost.

To suspend an account select the account from the list and select Suspend. The account will then be suspended and moved to the suspended accounts list. Once an account is suspended, it can be deleted from the suspended accounts form.

Note: At least one administrator account must be active at all times.

### **19.5 Re-Activating an Account.**

To re-activate an account select *Suspended Accounts* from the User Accounts. Select the account to be re-activated. Select Re-Activate.

### **19.6 User Log.**

A user log history is available to be printed. Selecting *User Log* from the User Accounts form will open a window to allow you to select an individual user, or all users. Select the options you want, and then press *Print*.

### **19.7 Lost Passwords.**

Lost passwords can be retrieved by contacting Predator Software and Mechanical.

## 20. Printing Reports.

### 20.0 Overview.

By default all reports are previewed before printing. This is to allow you to view the layout and contents of the report.

If the *Preview Reports* check box is not selected in the Options menu, the reports will be sent to the default printer. Refer to section 9-1-6 on page 8 of this users guide.

At times details displayed in preview mode suffice and there is no need to physically print the report.

### 20.1 Different formats available.

The reports can be outputted in several ways:

- Print.  
Select *File -> Print* from the print menu bar, or right click and select *Print*.
- Output as PDF format.  
Select *File -> Convert to PDF* from the print menu bar, or right click and select *Convert to PDF*. The PDF file will then be displayed allowing you to save it in your preferred location.
- Send to Email as an Attachment.  
Select *File -> Email Recipient (as PDF Attachment)* from the print menu bar, or right click and select *Email Recipient (as PDF Attachment)*.
- Export to Microsoft Excel.  
Select *File -> Export to Excel*

Select one of these options from the main menu, or by right clicking when a report is open.

If a report is not displayed but sent directly to the default printer, check the Options form and select *Preview Reports before Printing*.

### 20.2 Right Click Menu.

Any time a report is previewed right clicking will open a pop up menu allowing you to quickly set up or print any of the formats detailed in the previous section.

## 21. Reference Data.

### 20.0 Overview.

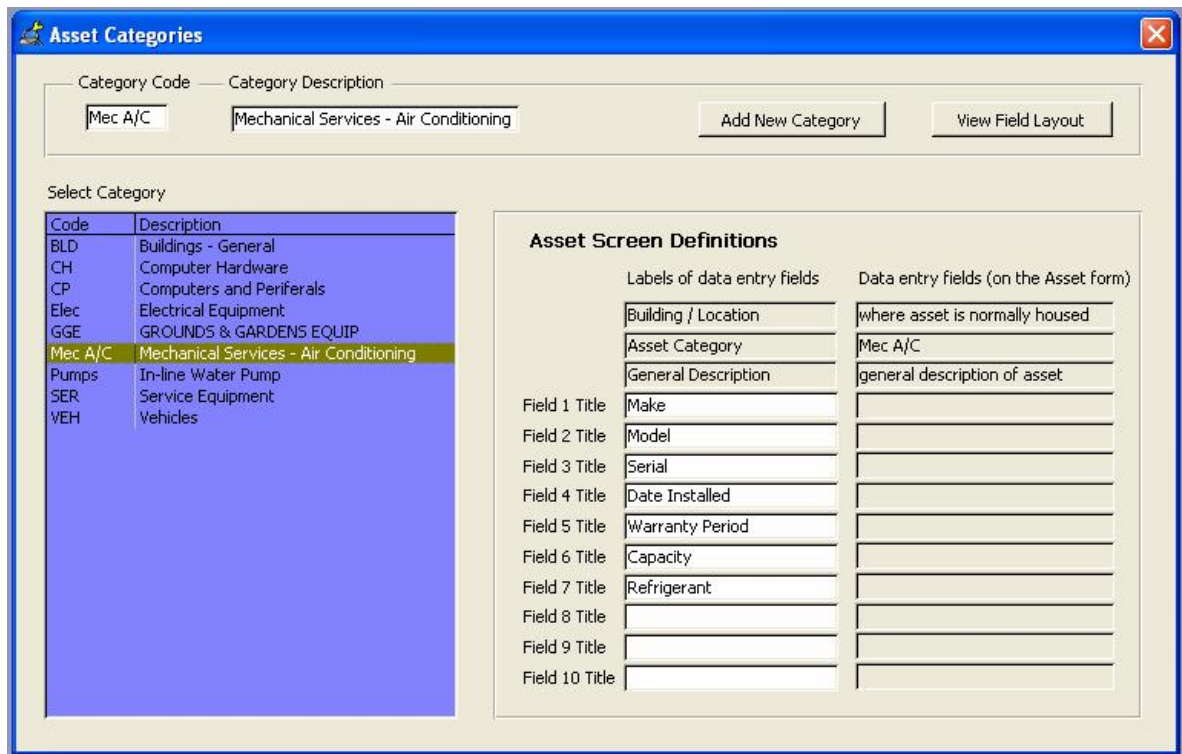
The ASSETsonTRACK system uses a central file of reference data throughout the program. This data will be most often recognised as data contained in the many drop down boxes throughout the system.

### 20.1 Accessing.

Reference data can be accessed in several ways. It can be accessed by selecting the information from the menu bar, or by double clicking on any drop down box. Several drop down boxes have set data that cannot be edited.

### 20.2 Asset Categories.

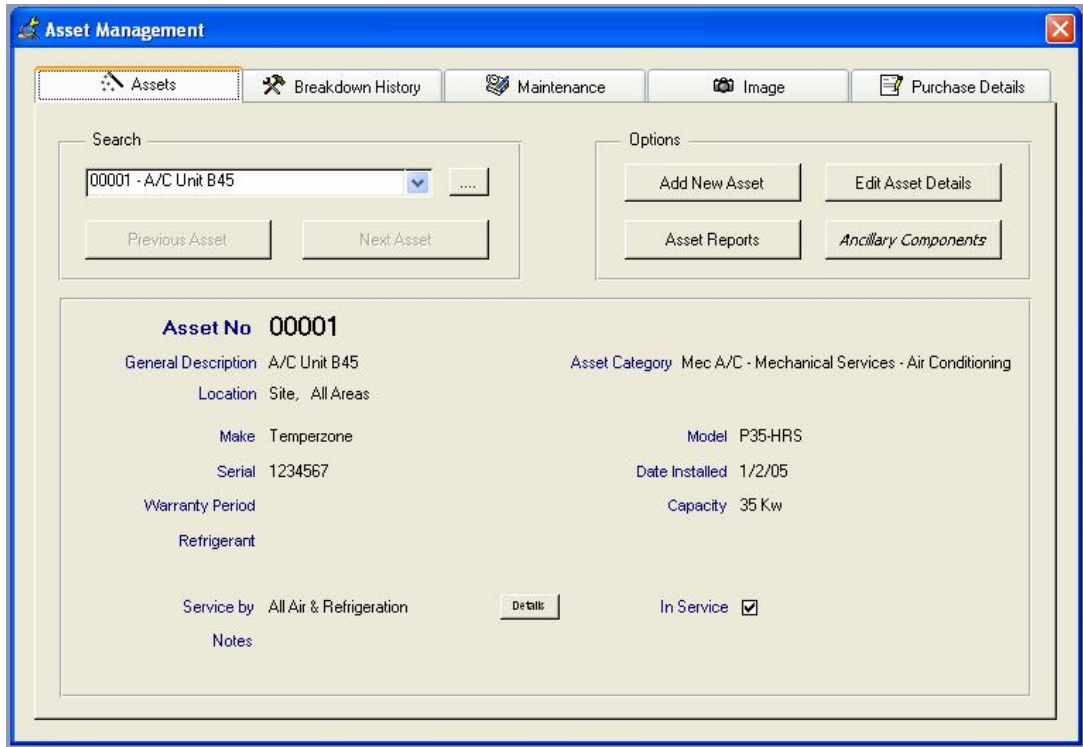
Asset categories are one of the most used, and one of the referenced pieces of information. It is for that reason that this data requires the most thought before asset details are entered into the system.



Personalised Asset fields.

### 20.2.1 Asset Category Layouts.

Each category allows the asset to have individual or “personalised” field names that reflect the actual data stored in the database. There are three mandatory fields, and you can customise up to ten individual fields. These field names will appear on the asset register as well as any reports.



Asset register with personalised fields.

### 20.2.2 Adding Asset Categories.

To add a new category, select *Add New Category* from the asset category form. A new form will open, allowing you to enter all relevant details. To see how the fields will appear in the asset register click the *View Field Layout* button. Check to see if the order you have entered the field names is OK and will be relevant to the category. You do not have to have a field name for every field. Some can be left blank.

### 20.3 Locations.

Locations are used to filter assets for reporting. It is important that locations reflect the areas you may require reports to be broken up into.



Location reference form.

When adding locations, the first column is used as the location code, and the second as a descriptor of the location. New locations can be added to the bottom of this form, and existing details can be edited as required.

### 20.4 Maintenance Schedules.

Maintenance schedules are used to set out maintenance procedures that should be followed when an asset requires regular maintenance. Each schedule should include a schedule code, name, frequency and then a description of any maintenance procedures that need to be followed.

A more detailed description can be found in the scheduled maintenance section of this guide.

### 20.5 Maintenance Schedules Frequencies.

Schedules are simply a list of time frames and the number of days the time frame equates to. This data is then used to automatically calculate future maintenance times.

## **20.6 Repair Status Codes.**

Repair status codes are used to track the progress of repair requisitions in the repair management section of the database. Codes can be added and edited by clicking the button beside the repair status field on the repair management form. When a repair status has changed, the field can be updated to allow other users to check the progress of repairs.

## **20.7 Contractors.**

Contractors are referenced regularly throughout the database. Any field that can contain contractor information must be selected from the list in the drop down box. If a contractor is not listed, they must be first added through the contractor information form.

A more detailed description can be found in the contractors section of this guide.

## 22. Menus.

### 22.0 Overview.

While using the database many short cuts to other parts of the system are available from the main menu at the top of the screen. The type of options available will depend on the access level granted to the user.

The following gives a brief overview of each menu. When a user logs on, different menus appear depending on their user level.

#### ADMINISTRATOR LEVEL

FILE	
MAIN MENU.....	PAGE 9
DATABASE OPTIONS.....	7
BACKUP DATABASE.....	6
DATA SERVER MANAGER.....	4
CLOSE.....	CLOSES CURRENT WINDOW
EXIT.....	EXITS DATABASE
ASSET MANAGEMENT	
ASSET REGISTER.....	11
FIND ASSET.....	11
BATCH ASSET DETAIL UPDATING.....	17
ANCILLARY COMPONENTS.....	13
ASSET REPORTS.....	28
DECOMMISSIONED ASSETS.....	13
CONTRACTORS.....	25
MAINTENANCE	
MAINTENANCE REPORTS.....	29
MAINTENANCE HISTORY.....	30
SEARCH FOR MAINTENANCE.....	29
BATCH MAINTENANCE SETUP.....	33
MAINTENANCE SCHEDULES.....	31
REPAIR MANAGEMENT	
REPAIR MANAGEMENT.....	18
NEW REPAIR REQUISITION.....	20
UNACKNOWLEDGED REQUISITIONS.....	22
OUTSTANDING REPAIRS.....	22
REPAIR REPORTS.....	29
OHS REPORTS.....	19
REPAIR HISTORY BY CONTRACTOR.....	27
SEARCH FOR REQUISITION.....	21
REFERENCE DATA	
ASSET CATEGORIES.....	40
LOCATIONS.....	42
MAINTENANCE SCHEDULES.....	42
SCHEDULE FREQUENCIES.....	42
SPARE PARTS	
ANCILLARY COMPONENTS.....	13

MANAGER LEVEL

FILE	
MAIN MENU.....	PAGE 9
BACKUP DATABASE .....	7
CLOSE.....	CLOSES CURRENT WINDOW
EXIT .....	EXITS DATABASE
ASSET MANAGEMENT	
ASSET REGISTER .....	11
FIND ASSET.....	11
ASSET REPORTS .....	28
DECOMMISSIONED ASSETS .....	13
CONTRACTORS .....	25
MAINTENANCE	
MAINTENANCE REPORTS .....	29
MAINTENANCE HISTORY .....	30
SEARCH FOR MAINTENANCE .....	29
MAINTENANCE SCHEDULES .....	31
REPAIR MANAGEMENT	
REPAIR MANAGEMENT .....	18
NEW REPAIR REQUISITION.....	20
UNACKNOWLEDGED REQUISITIONS .....	22
OUTSTANDING REPAIRS.....	22
REPAIR REPORTS .....	29
OHS REPORTS .....	19
REPAIR HISTORY BY CONTRACTOR .....	27
SEARCH FOR REQUISITION .....	21
REFERENCE DATA	
ASSET CATEGORIES.....	40
LOCATIONS .....	42
MAINTENANCE SCHEDULES .....	42
SCHEDULE FREQUENCIES.....	42
SPARE PARTS	
ANCILLARY COMPONENTS .....	13

CONTRACTOR LEVEL

FILE	
LOG OFF .....	10
EXIT .....	EXITS DATABASE

GUEST LEVEL

FILE	
MAIN MENU.....	9
CLOSE.....	CLOSES CURRENT WINDOW
EXIT .....	EXITS DATABASE
ASSET MANAGEMENT	
ASSET REGISTER .....	11
FIND ASSET.....	11
ASSET REPORTS .....	28
DECOMMISSIONED ASSETS .....	
CONTRACTORS .....	25

MAINTENANCE	
MAINTENANCE REPORTS .....	PAGE 29
MAINTENANCE HISTORY .....	30
SEARCH FOR MAINTENANCE .....	29
MAINTENANCE SCHEDULES .....	31
REPAIR MANAGEMENT	
REPAIR MANAGEMENT .....	18
NEW REPAIR REQUISITION .....	20
UNACKNOWLEDGED REQUISITIONS .....	22
OUTSTANDING REPAIRS .....	22
REPAIR REPORTS .....	29
OHS REPORTS .....	19
REPAIR HISTORY BY CONTRACTOR .....	27
SEARCH FOR REQUISITION .....	21
REFERENCE DATA	
ASSET CATEGORIES .....	40
LOCATIONS .....	42
MAINTENANCE SCHEDULES .....	42
SCHEDULE FREQUENCIES .....	42
SPARE PARTS	
ANCILLARY COMPONENTS .....	13

USER LEVEL

FILE	
EXIT .....	EXITS DATABASE

PRINTING MENU

FILE	
PAGE SETUP .....	ALLOWS YOU TO CONTROL PAGE MARGINS ETC
PRINT .....	PRINTS CURRENT DOCUMENT
PRINT TO .....	ALLOWS YOU TO SELECT DEVICE TO PRINT TO
CONVERT TO PDF .....	CONVERTS REPORT TO PDF AND SAVE TO PC
MAIL RECEIPT (AS PDF ATTACHEMENT) .....	OPENS DEFAULT EMAIL CLIENT WITH REPORT AS ATTACHMENT
EXPORT TO MICROSOFT EXCEL .....	EXPORTS IN EXCEL FORMAT
ZOOM .....	ALLOWS YOU TO ZOOM TO A SPECIFIC SIZE
CLOSE .....	CLOSES CURRENT REPORT WINDOW

RIGHT CLICK MENU

ZOOM .....	ALLOWS YOU TO ZOOM TO A SPECIFIC SIZE
ONE PAGE .....	SIZES REPORT TO FIT ONE PAGE PER SCREEN
MULTIPLE PAGES .....	ALLOWS YOU VIEW SEVERAL PAGES AT ONCE
PAGE SETUP .....	ALLOWS YOU TO CONTROL PAGE MARGINS ETC
PRINT .....	PRINTS CURRENT DOCUMENT
CONVERT TO PDF .....	CONVERTS REPORT TO PDF AND SAVE TO PC
MAIL RECEIPT (AS PDF ATTACHEMENT) .....	OPENS DEFAULT EMAIL CLIENT WITH REPORT AS ATTACHMENT
EXPORT TO MICROSOFT EXCEL .....	EXPORTS IN EXCEL FORMAT
CLOSE .....	CLOSES CURRENT REPORT WINDOW