# Assets Desktop Manual

## Contents

## Introduction

Cypad Assets consist of Desktop and Tablet components. This manual covers the Desktop. The main functions of the Assets Desktop are:

1) Add, edit and delete catering, cleaning and other similar assets
2) Analyse the data held about assets across sites
3) Manage repairs
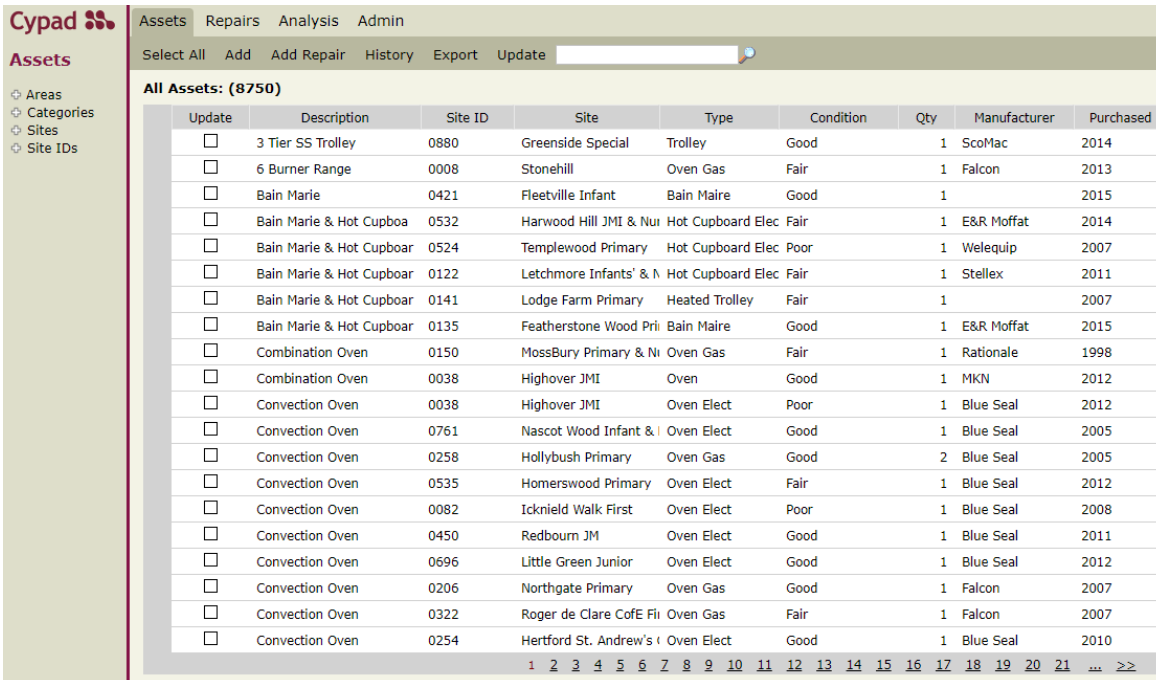4) Manage asset types and other similar configurable items

## Menus

The menu items available are:

| Menu | Use |
|---|---|
| Assets | Add, edit, delete and view assets |
| Repairs | Manage, modify and view repairs |
| Analysis | Summarise and analyse asset data |
| Admin | Manage and edit config items |

## Assets Menu

Use the Asset Menu to add, edit, delete or view asset information. This data may have been imported, entered on the tablet or entered on the Desktop. In the navigation pane, select the assets associated with areas, a site or asset type.

To view all assets at one time, press the Ctrl key while clicking on Area or Category.

## Add

Add a new asset. Enter all the known information about an asset.

## Add Repair

Select an asset by locating it and click once. Click **Add Repair** and a pop-up box will be shown to enter details.



**Repairer**: Choose repairer from drop down list. These are setup in Admin.

**Type**: Choose Reactive or Warranty

**Priority**: Choose Low, Normal, High or Critical

**Status**: Status will automatically be set to Notify on first saving. Repair statuses are as follows:

| Status | Description |
|--------|-------------|
| Notify | Repair initiated, inform the necessary engineer or other person to take the action |
| Check | Check that the required action has been taken |
| Closed | Confirmation has been obtained that the action has been taken |

**Due By:** Select date from calendar

**Report to**: Enter the name of the contact at the repairer. This will auto-populate when a repairer is selected and a name has been allocated to the repairer in Admin.

**Email to**: Enter the email address of the repairer. This will auto-populate when a repairer is selected and an email address has been allocated to the repairer in Admin.

**Cost (£)**: Enter the approximate cost of the repair

**Notes**: Enter information about the repair in more detail

**Photos**: Attach a photo, typically taken using the tablet, with a repair. Save the repair before the photo can be viewed.  Drag the corner of the photo window to increase or decrease the image size.

  *Note: Type, Priority and Status are default options which cannot be changed*

## History
This will show the repair history for the selected asset.

## Export
Click to export the assets shown to Excel.

## Update
Select one or more assets by clicking in the Update check box. Click Update. A pop-up box will be shown but with only some of the fields available to be altered. Enter the items you want to change.

### Search

Enter the text you want to search for then click the magnifying glass. To remove the search, delete the text and click the magnifying glass again.

## *Repairs Menu*

### Editing a Repair

Click on a repair to edit it.

### Emailing a Repair Request

Click on a repair and in the pop-up box click on **Email Request**. This will send the request to email address in the **Email to** field.

### Deleting a Repair

Select one or more repairs, using the Ctrl key to select multiple entries.  Now right click and select Delete.

### Repair Toolbar

**Export:** Click here to export the actions list to Excel.  This will take account of any filtering

**Report:** Click here to produce a Word report including all the repairs visible on the desktop

**Filter:** Filter the actions shown

**Find:** Enter search text and click the magnifying glass.  To remove the search, delete the text and click the magnifying glass again.

## *Analysis Menu*

There are three standard analyses:

| Analysis type | Description |
|---|---|
| Count | A count of the number of assets and the number of locations they occur at, summarised by Asset Type, Manufacturer etc. |
| Replacement Schedule | If you have entered a purchase date and put in the life expectancy of Asset Types a replacement schedule is shown giving the number of each type of asset that will need replacing in each year.  Click on the number to view the sites that need replacing. |
| Inventory | A list containing every asset for the selected site, area or category of equipment.  Filtered by Asset Type or Manufacturer. |

To print report, export the report to Excel.

## Admin Menu

### Types: Categories

Add and edit the categories to be used.

Assets are organised onto two levels. The top level is Categories, for example Catering Equipment and Fixtures & Fittings. Below this are Asset Types such as Bain Mairie & Fridge.

### Types: Asset Types

Add and edit the asset types to be used. Choose the Category to which they belong, a fuel type, service interval months and replacement years.

### Types: Repairers

Add and edit the repairers for the assets.

The **Name** and **Email** under **Report To** are used to auto-populate details when adding a repair.

### Manufacturers

Add and edit manufacturers and supplier details. Enter description, telephone number, email address and contact name.

**Supplier:** Change type to Supplier if the company is a supplier rather than a manufacturer.  This will affect how the company is seen on the Manufacturer or Supplier list when entering Assets. They can't be both.

### Configure

Enter the repair prefix which is used for the Job ID when adding a repair.

### Import

A routine for importing sites and asset information. This is normally used when setting up the system but can also be used to add more items subsequently.