EQUIPMENT

ASSETS – NOTES – VIEW, ADD

There may be **notes** or **comments** that need to be recorded and linked to a particular asset. This process sets out how to view the current notes, if applicable, and how to link additional notes. Notes <u>cannot</u> be edited or deleted.

Ribbon Access: *Equipment and Locations > Assets*

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- The *Machine List for [ ]* screen will be displayed.

THE SITE AND TYPE FILTERS

- The screen will open with the default *Site* setting configured on the user.
  - In this image *Durban* is selected.

Note: Refer to Site Selection for more information about Site settings.

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1. This screen will open by default in the *All* Type. You do <u>not</u> need to change this Type to view or add asset notes. If this screen is already open in another Type e.g. Internal Assets, then click on the *drop-down arrow* and select from the list, the right Type that contains the asset you wish to work with.

SELECT THE ASSET

2. Select the *row* of the *asset* where you wish to view the linked *notes*.
3. Click on the *Notes* tile.

VIEW NOTE(S)

1. The *Note Listing for Serial No. : []* screen will open.
2. Here you can view a list of all the notes linked to the selected asset.
   - **Note**: You <u>cannot</u> edit or delete any information in the *Comments* data grid.
3. Click on the *Back* button to return to the Machine Listing screen.

ADD A NOTE TO AN ASSET

Navigate to the *Note Listing for Serial No.: []* screen as explained above.

1. Select the *row* of the asset.
2. Click on the *Notes* tile.

1. The *Note Listing for Serial No.: []* screen will open.
2. In this example there are no notes currently linked to the selected asset.
3. Click on *Add*.

1. The *Equipment: []* screen will be displayed.

ADD NOTE DETAILS

2. Add the Note *details*, as required:

- **Note Date and Time:** This will auto populate with the current date and time. You can click on the drop-down arrow and use the calendar function to select an alternative date, if required.
- **Employee:** This will auto populate with the person currently logged on to the system. You can click on the drop-down arrow and select an alternative employee, if required.
- **Note:** Click in the text box and type in the relevant note information, as required.

SAVE NOTE DETAILS

- When you have finished adding the note details,
- Click on *Save*.

- You will return to the *Note Listing for Serial No.: []* screen.
- An *Asset Processing* message box will appear, advising the following:
  ◦ *Note has been added to Asset No: [].*
- Click on *OK*.

VIEW ADDED NOTE

- You can now view the logged note in the *Comment* section of this screen.

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- Click on *Back* to return to the *Machine List for []* screen.

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