

EQUIPMENT

ASSETS - ADD - USER DEFINED

A **User Defined** panel has been added to the Asset Maintain screen - the *Equipment Maintenance for Serial No: []* screen.

User defined fields in BPO enable the user to provide more information within a module so that work or associated processes can be carried out more efficiently.

These added fields cut down the transition between screens or reduces the amount of screens open in order to find information. In essence these fields serve as a shortcut so that users do not have to leave the listing or maintain fields affected.

At present, these fields in the **Equipment - Assets** module can be used to add *extra* information relevant to the selected asset. The added fields will reflect in the User Defined panel in the Asset Maintain screen across *all* assets on the system, but the **Variable Values** selected for each User Defined field will be unique to the selected asset.

This information will also reflect in the **Call Maintain** screen where the asset is linked. Although the fields can be *viewed* from the Call Maintain screen, the actual information can only be *edited* in the Asset Maintain screen.

Ribbon Access: *Equipment and Locations > Assets*

□

1. The **Machine List for []** screen will display.

THE SITE AND TYPE FILTERS

2. The screen will open with the default **Site** setting configured on the user.

Note: Refer to [Site Selection](#) for more information.

- The **Site** does not need to be selected in this screen, there is an opportunity to select the Site in the next step in this process.
3. By default, this screen will open with the **Type** filter set to '**All**', which lists all of the assets on the system (*Customer Assets*, *Internal Assets* and *Serialised Stock*).
 - The **Type** filter does not need to be selected in this screen to continue this process.
 4. Click on **Add**.

▮

1. The **New Equipment** screen will open.
2. There is an opportunity to select the **Site** ('Branch' in the screen.)

Follow the processes to:

3. [add the customer asset details](#) and
4. [add the customer asset finance details](#).

(Only a **customer asset**¹ should be added from this screen.)

▮

¹A customer asset is a stock item that has been sold (issued and invoiced) to a customer. A customer asset could also be added to the system directly in a case where a customer brings in a machine for service or repair that was bought elsewhere.

THE USER DEFINED PANEL

1. Once the customer *asset details* and *finance details* have been added,
2. Click on the **User Defined** tab.



1. The **User Defined** panel will open.
2. In this example, there is a pre-existing **Code**. This means that a User Defined custom element has already been added to *another* asset in the system.
3. The **Code** and **Code Description** are not specific to an individual asset. When a Code and Description are entered and saved here, they are subsequently available in *every* asset User Defined panel.
4. The **Variable Value** is unique. These are set up per specific asset.



ADD NEW CUSTOM ELEMENT

1. **Right-click** anywhere in a row of the data grid.
2. A **Process** menu will pop up.
3. Click on **Add - Add New Custom Field**.



1. The **Add new custom element** screen will open.

All of the fields in this screen are mandatory [*].



Note: These fields can be populated according to *individual* company requirements. The example given here is pertinent to the system being demonstrated and is not universal.

CODE AND DESCRIPTION

2. **Code:** Type in a *unique* code specific to the custom element you wish to add.
3. **Description:** Type in the long, descriptive version of the code above.

Reminder: When saved, both of these fields will reflect in the **User Defined** panel in the **Asset Maintain** screen across all assets on the system. Where the asset is linked to a **Call**, the fields will also display in the **Call Maintain** screen.

]

In this example we are documenting information relevant to a particular type of asset: a *copier machine*. The data added to this screen will therefore be pertinent to the *copier industry*. However, *any* data relevant to this module for the specific user and their company can be added here.

1. In this example, the **Code** and **Description** added are relevant to the database of the demonstrating system: **PCPS - Printed Copies Per Second**.

INPUT TYPE

2. Click on the drop-down arrow in the **Input Type** field.
3. A **Type** menu will display.
4. The options are :
 - **FREETEXT - Free Input Text:** you can type data directly into the text box.
 - **LOOKUP - Lookup list:** you can select the desired value from the list.

- **YesNo - Yes or No Value:** this field is used to collect data with only a 'Yes' or 'No' answer. Until this field is answered one way or the other, the field's value is considered to be missing.

Select the Type that is *most applicable* to the custom element being added.

5. In this example, the **FreeText** selection seems the most congruous for the following reasons:

- It is not possible to input a print *amount* with **YESNO**
- Although you could create a **LOOKUP** list with many print amount options, the **FREETEXT** selection seems the least restrictive.

▮

Additional Info: The information added here will be relevant for users of the **Call screen. Scenario:** A customer may report that a copier seems to be printing slowly, perhaps **1** copy per second. The call screen monitor can now view the expected copies per second in the **User Defined** panel. This saves having to open multiple screens to navigate to the **Asset Maintain** screen where the Copies Per Second prediction on that particular copier can be viewed. If there is a discrepancy, a fault can be logged and a work order can be created for a technician to check the copier machine in question.

SAVE NEW CUSTOM ELEMENT

1. When you have finished adding the information to these fields,
2. Click on **Save**.

▮

1. You will return to the ***New Equipment*** screen.
2. The newly created custom element will be added to the panel.

ADD VARIABLE VALUE

3. Click in the **Variable Value**¹ field.
 - As ***FREETEXT*** Type was selected in the previous step, you can type directly in this field.

Reminder: The data added to this **Variable Value** field is unique to the selected asset and will not reflect in any other asset or other module *User Defined* fields.

▮

1. Enter the **Variable Value** appropriate to the *Code* and *Description* fields added.
 - In this case the number **5** has been typed in - this copier is expected to print **5 copies per second**.
2. Click on **Save**.

▮

1. The new custom element will be saved in the User Defined panel and you will return to the ***Machine List for []*** screen.
2. The *newly added asset* with the *new custom element* will be indicated in the screen.

¹A 'variable value' is a data item whose value can change. In the User Defined Panel, this column can have data added that is unique to the asset selected and will not affect the data of other assets on the system.

VIEW NEW CUSTOM ELEMENT NOW LINKED TO ALL ASSETS

3. Select the row of a *different* asset in the data grid.
4. Click on **Edit**.

▮

1. The **Equipment Maintenance for Serial No: []** screen will open.
2. If not already extended, click on the **User Defined tab** to open the panel.
3. The custom element added to the *previous asset* is now available to this asset.
4. Note that the **Variable Value** column is not populated.

Reminder: The data added to this **Variable Value** field is unique to the selected asset and will not reflect in any other asset or other module *User Defined* fields.

5. Click on **Back** or **Close** the screen to return to the **Machine List for []** screen.

▮

VIEW USER DEFINED PANEL IN THE CALL MAINTAIN SCREEN

The new Custom Element added in this process will also reflect in the **Call Maintain** screen where this asset is linked to a Call. Either a *new* Call or an *existing* Call will have these new details available in the **Calls User Defined** panel.

1. Make a note of the **Serial No.** of the asset.
 - In this example: **000002**.
2. Click on the **Service** ribbon tab.



1. The **Service ribbon toolbar** will open.
2. Click on the **Calls** toolbar button.



1. The **Call Listing** screen will open.
2. Click on **Add**.



1. The **Call maintenance** screen will open.
2. Click on the **User Defined tab** on the right-hand side of the screen.



1. The **User Defined** panel will open.
2. Note that there is currently *no data* in the **Asset User Defined** panel.

Close the panel by clicking *anywhere* on the screen, outside of it.



1. When the User Defined panel has *receded*,
2. Click in the **Reference No** field in the **Serial No** row of the **Relates To** panel.



1. An **ellipsis button** will be revealed.
2. Click on this button to display the **Select the related equipment for this call** look up screen.

3. Recalling the Serial No. of the asset in the process above, either *scroll through* the list or use the Filter Search Row to find the asset.
4. Select the **row** of that asset.
5. Click on **Ok**.



1. The selected *Serial No* will populate the **Reference No** field.
2. Click on the **User Defined** tab.



1. The **User Defined** panel will open.
2. The **Code, Description** and **Variable Value** columns of the linked asset can now be viewed in the **Asset User Defined** panel

Note that this data is not editable from this screen. If the information in this panel needs to be changed it will need to be done from the **Asset Maintain** screen.

3. Use the **Open Windows** feature to return to the **Machine List for []** screen.



ADD LOOKUP FIELDS TO THE CUSTOM ELEMENT

If **LOOKUP list** was selected as the custom element Input Type, *lookup options* will need to be added to a Lookup Item list.

1. In the **Machine List for []** screen, select the **row** of the asset where you wish to add Lookup fields to a custom element.
2. Click on **Edit**



1. The **Equipment Maintenance for Serial No: []** screen will open.

In this example, one of the custom element fields is to be updated to display a **Lookup list**, where *new lookup fields* will be added.

1. Right click in the **row** of the custom field.
2. A **Process** menu will pop up.



Note: The Process menu contains an option "**Lookup - Add new lookup item**" but this option is currently greyed out (inactive). This is because the row selected does not have **Input Type: Lookup list** in its **Variable Value** field.

3. Click on **Edit - Edit Custom** field.



1. The **Add new custom element** screen will open.
2. Click on the **drop-down arrow** in the **Input Type** field and select **Lookup - Lookup list**.



1. The selection: **Lookup list** will populate the **Input Type** field.
2. Click on **Save**.



1. You will return to the **Equipment Maintenance for Serial No: []** screen
2. The selected custom field will *update* to display the new Input Type. You may need to click in the **Variable Value** field to trigger the changes.
3. In this example, the Variable Value field has updated to a **drop-down arrow** inherent of the **Lookup list** Input Type.



1. *Right click* in the **Variable Value** field.
2. The **Process** menu will pop up.



Note: The Process menu option: "**Lookup - Add new lookup item**" is now active. This is because the row selected now has **Lookup list** as it's Variable Value *Input Type*.

3. Click on **Lookup - Add new lookup item**.



1. The **Add new lookup element** screen will open.
2. **Code:** Type in a *unique* code specific to the lookup element you wish to add.
3. **Description:** Type in the long, descriptive version of the code above.



Reminder: In this example we are documenting information relevant to a particular type of asset: a copier machine. The data added to this screen will therefore be pertinent to the copier industry. However, any data relevant to this module for the specific user and their company can be added here.

1. In this example, the **Code** and **Description** added are relevant to the database of the demonstrating system: **30PC - Thirty Percent**.
2. When you have finished adding the information to these fields, click on **Save**.



1. You will return to the **Equipment Maintenance for Serial No: []** screen.
2. Click in the **Variable Value** field of the custom element row.
3. A **drop-down arrow** will appear. Click on this arrow.
4. A **Type** menu will display.
5. The newly added **Lookup List element** will be available in the list.

Follow the process above to add as many lookup elements as required.

▮

1. In this example, a total of 3 lookup elements have been added to the list:

- **30PC:** Thirty Percent
- **40PC:** Forty Percent
- **50PC:** Fifty Percent

ADD VARIABLE VALUE

2. Click on the **Type** of *User-defined Scaling* that is appropriate to this model machine. **50PC** - *Fifty Percent* is selected.

Remember: Although the Lookup **Type** list will be available to **all** assets on system, The *actual* Type selected and added to this **Variable Value** field is unique to the selected asset and will not reflect in any other asset or other module User Defined fields.

▮

SAVE NEW LOOKUP ELEMENTS AND CUSTOM FIELDS

1. When you have finished adding the information to the User Defined fields,
2. Click on **Save**.

▮

1. The new custom elements will be saved in the User Defined panel and you will return to the **Machine List for []** screen.

2. The asset that has *User Defined fields* and *Lookup elements* added, will be indicated in the screen.

▮

Related Topics

- [Assets - Add - Asset Details](#)
- [Assets - Add - Finance Details](#)
- [Assets - Add - Other Data](#)
- [Assets - Add - User Defined](#)

MNU.007.014

