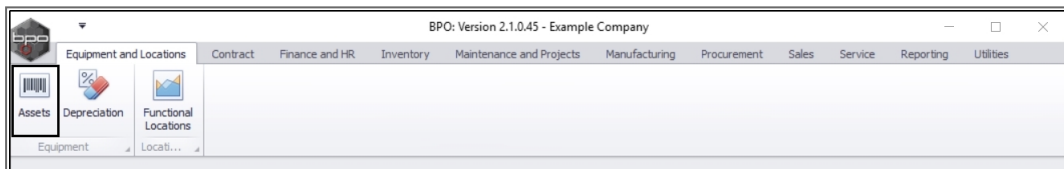We are currently updating our site; thank you for your patience.

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.

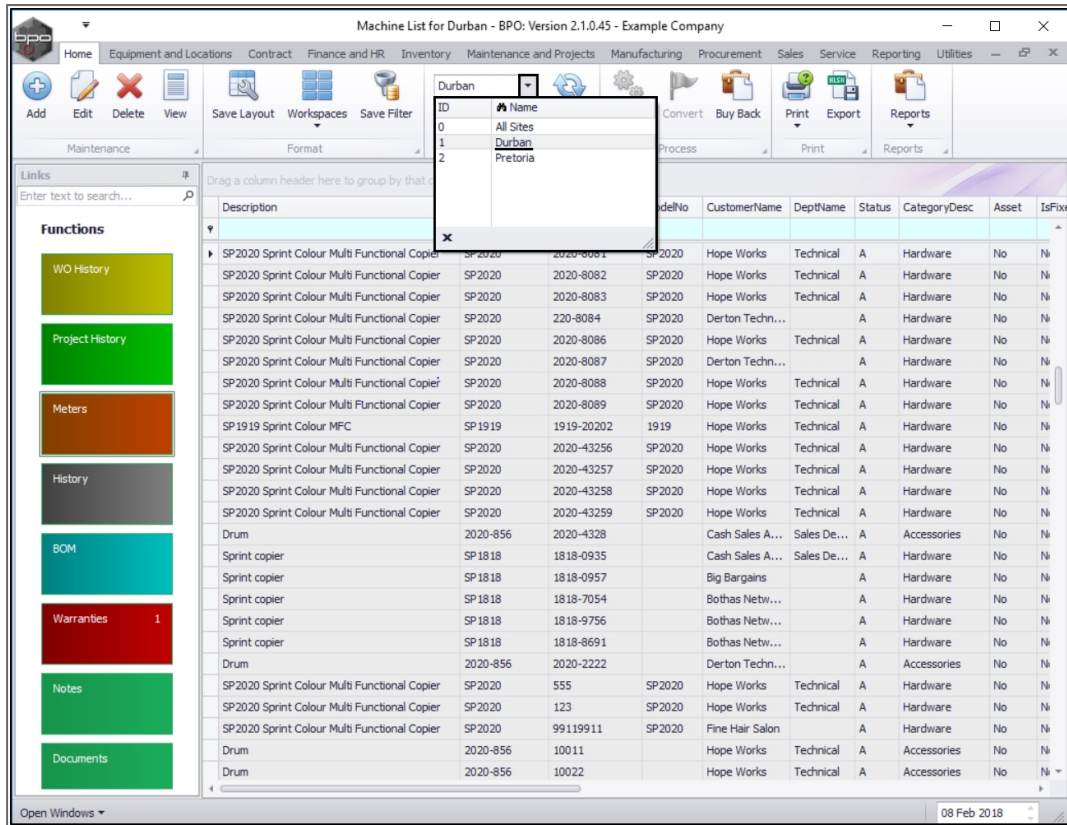**Ribbon Access:** Equipment and Locations > Assets

- 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.

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.
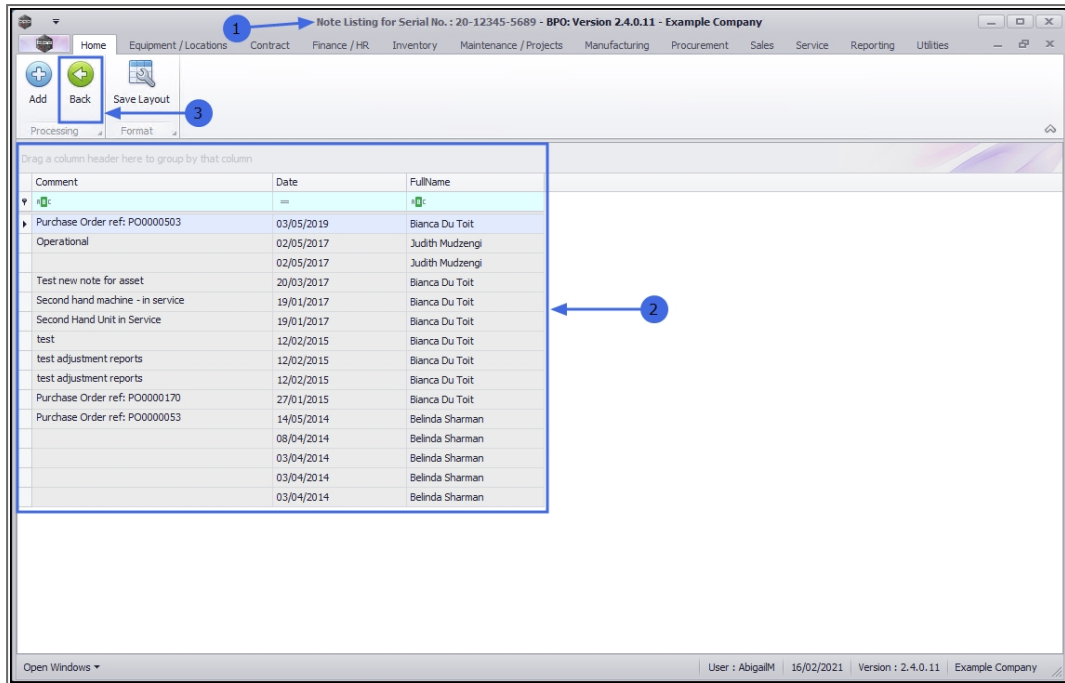
SELECT THE ASSET

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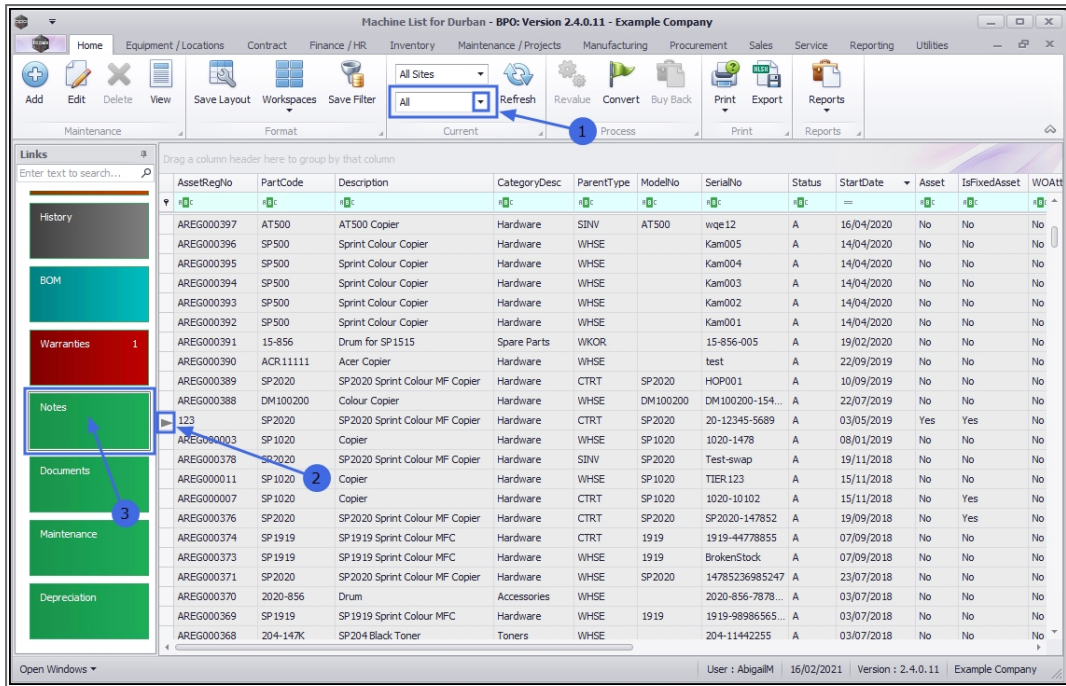
VIEW NOTE(S)

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.
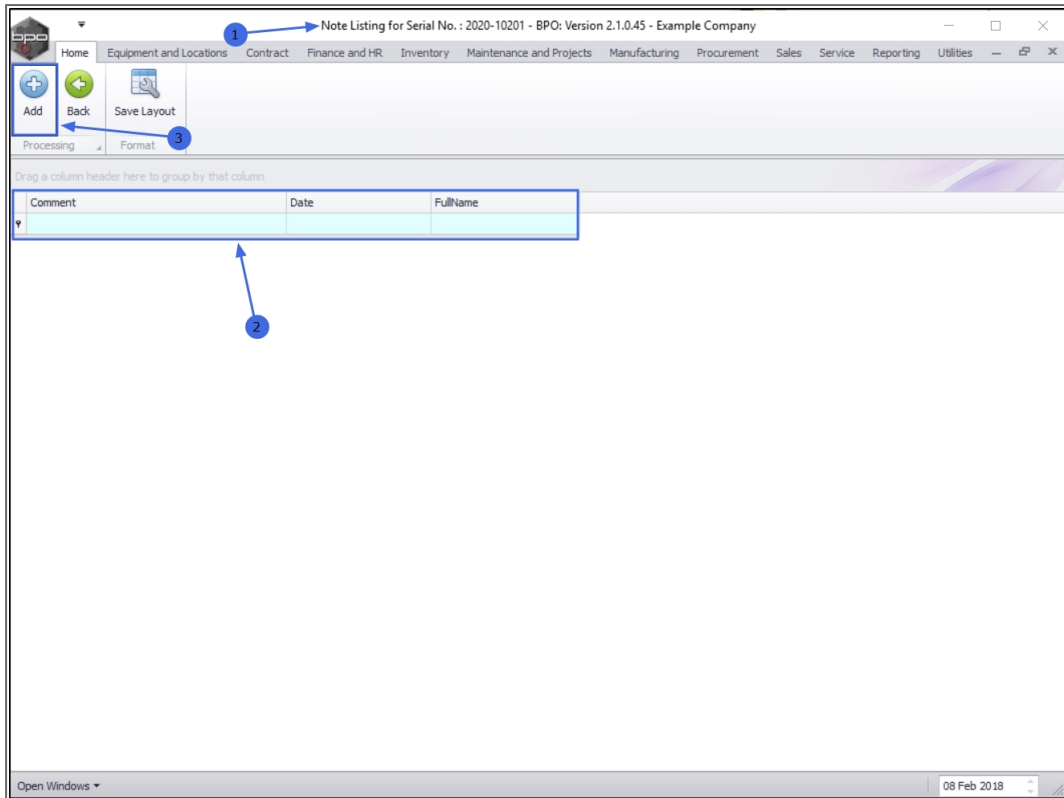3. Click on the **Back** button to return to the Machine Listing screen.

ADD A NOTE TO AN ASSET

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

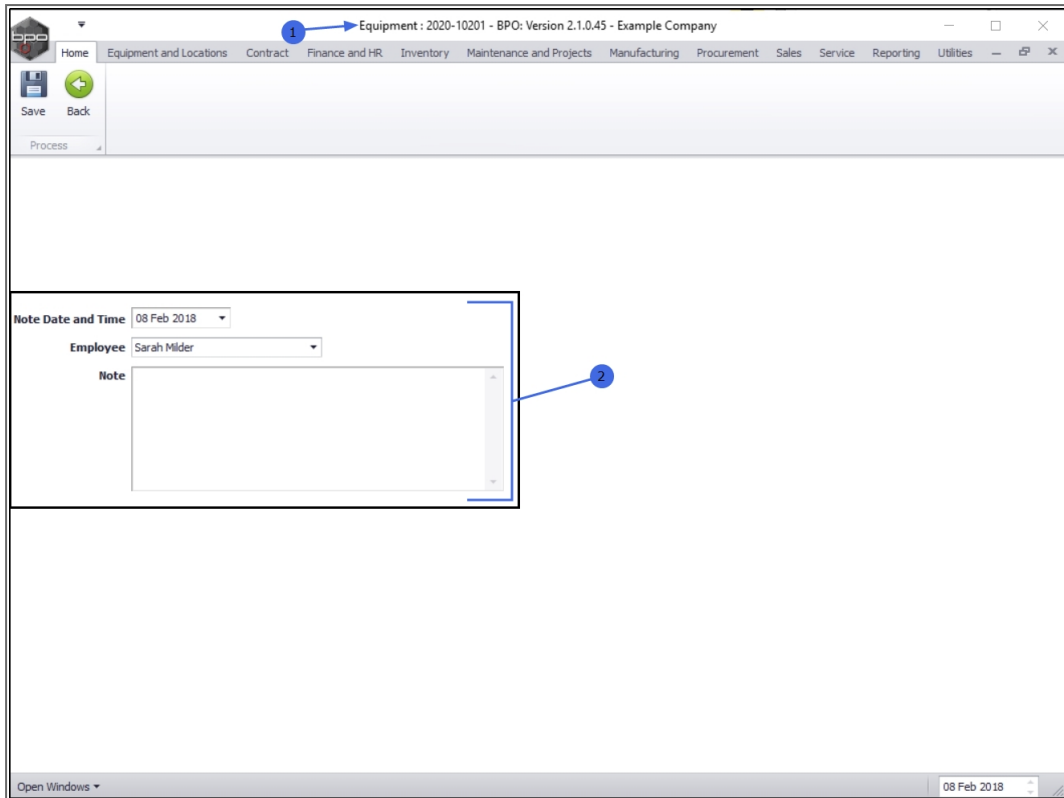1. Select the **row** of the asset.
2. Click on the **Notes** tile.
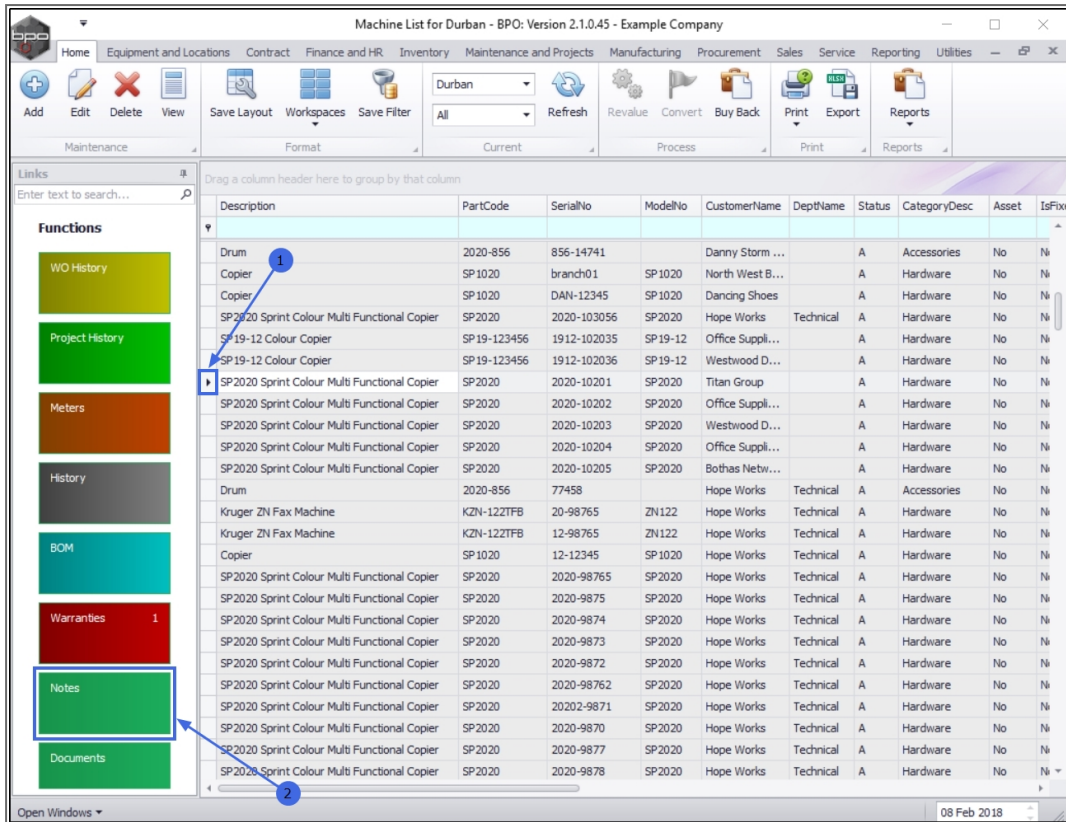
1. The **Note Listing for Serial No.: []** screen will open.
2. In this example there are no notes currently linked to the selected asset.
3. Click on **Add**.

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.
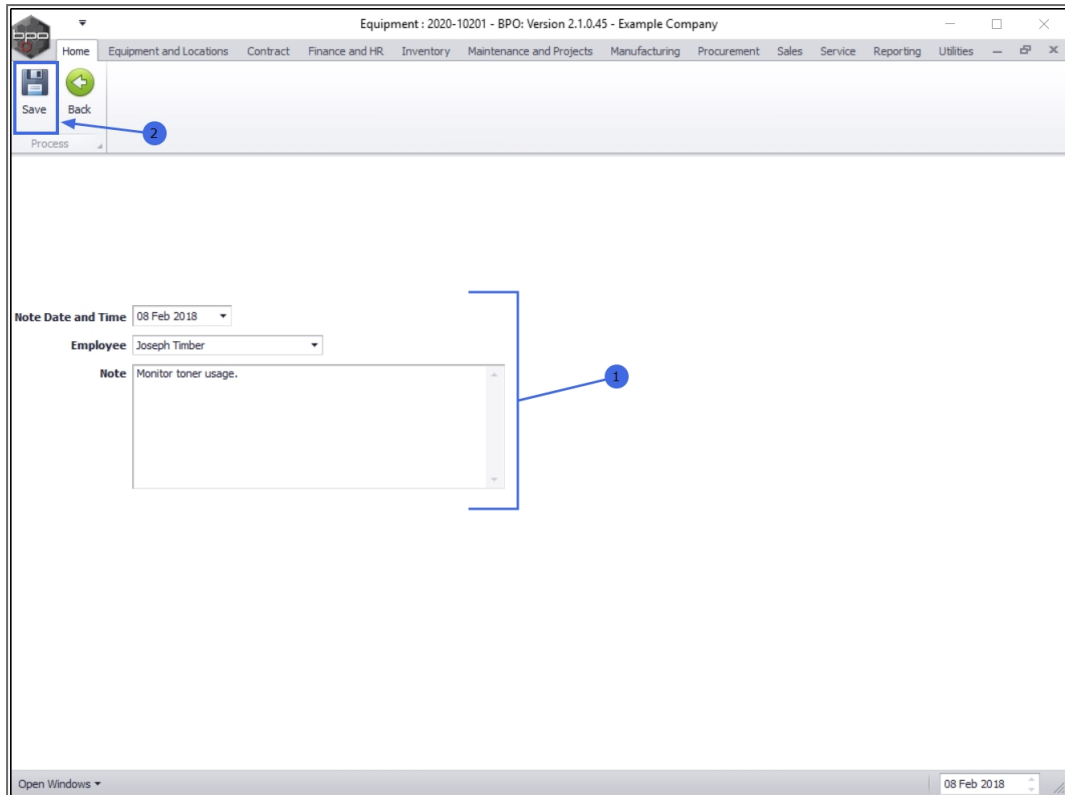   - **Note:** Click in the text box and type in the relevant note information, as required.

SAVE NOTE DETAILS

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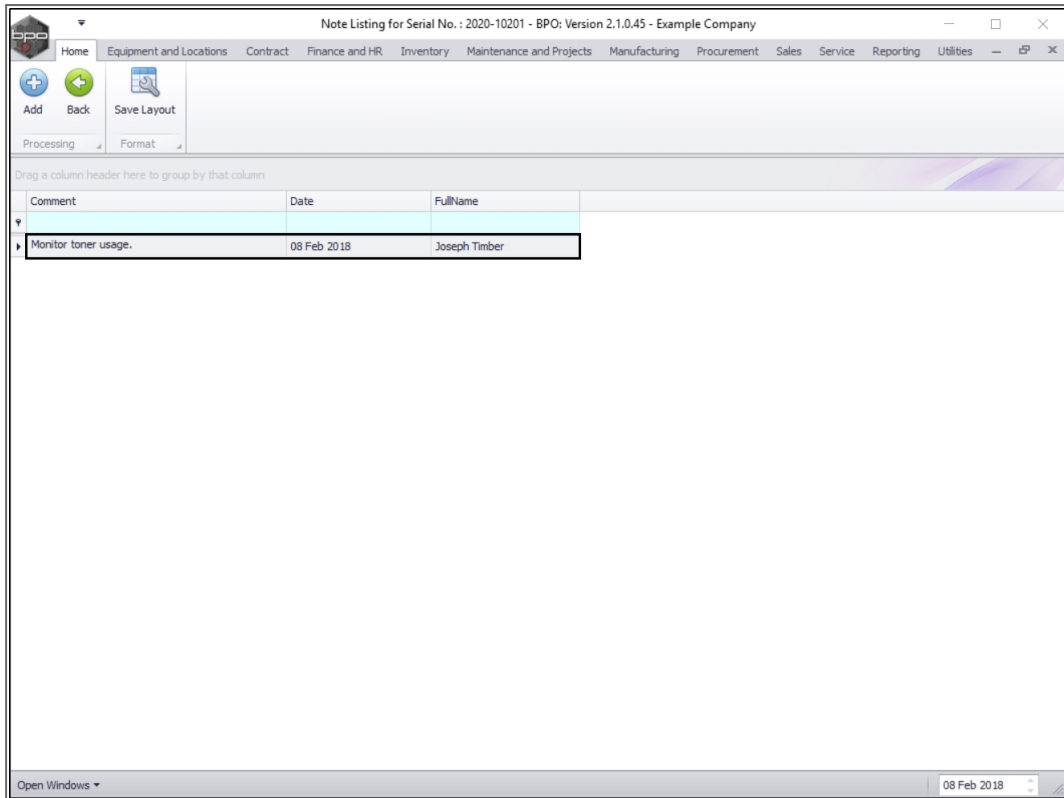- Click on **Save**.

- 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**.
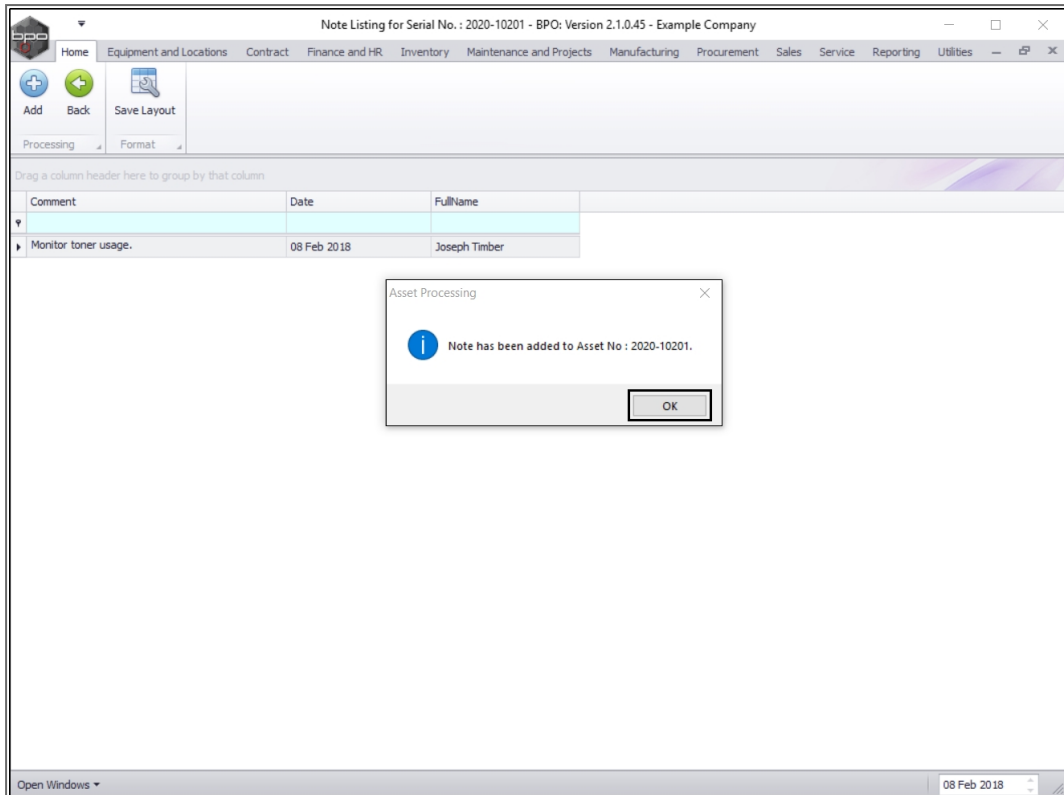
VIEW ADDED NOTE

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

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

MNU.007.013