

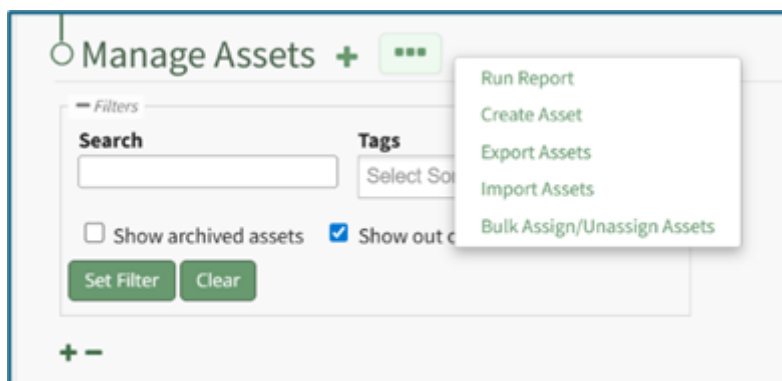
# Add Components to a Parent Asset

To add components to an asset, open the Manage Assets Page in the Assets Module from the Main Menu.

In order to create components, the parent asset must have already been created.

## How To: Create a New Asset

To create a new asset, open the Manage Assets Page in the Asset Module and click the plus sign (+) icon to open the New Asset modal.



You can also access the New Asset Modal by clicking the three dot (...) icon and selecting "Create Asset" from the context menu.

The New Asset Modal requires the entry of an Asset Title. Optional fields include an asset description, tags, manufacturer, model number, serial number, and critical spares.

Select the "Critical Component" checkbox to designate this asset as a critical component. This term is subjective for your organization to define. Designating an asset as a critical component will result in a hazard symbol being used as a visual indicator.



Critical items are prioritized and show separately on the Assets Module Summary.

An entire asset is designated as a critical. All components and associated tasks will also have a critical component designation.

KAStrack's default setting prevents users with an expired certification role from performing tasks (such as completing tasks, recording faults, and updating meter readings). Select the "Allow users who are expired in assigned certification roles to perform tasks" checkbox to allow a user to perform tasks regardless of their assigned certification role status.

The remaining three checkbox options all relate to asset status alert preferences.

The "Send an alert when the asset changes from Past Due to OK" checkbox will send an alert via email to the assigned users when the task status changes from past due (red) to current/up to date (green).

The “Send an alert when the asset changes to Warn” checkbox will send an alert via email to all users assigned to the asset when the task status changes from current/up to date (green) to warn (yellow).

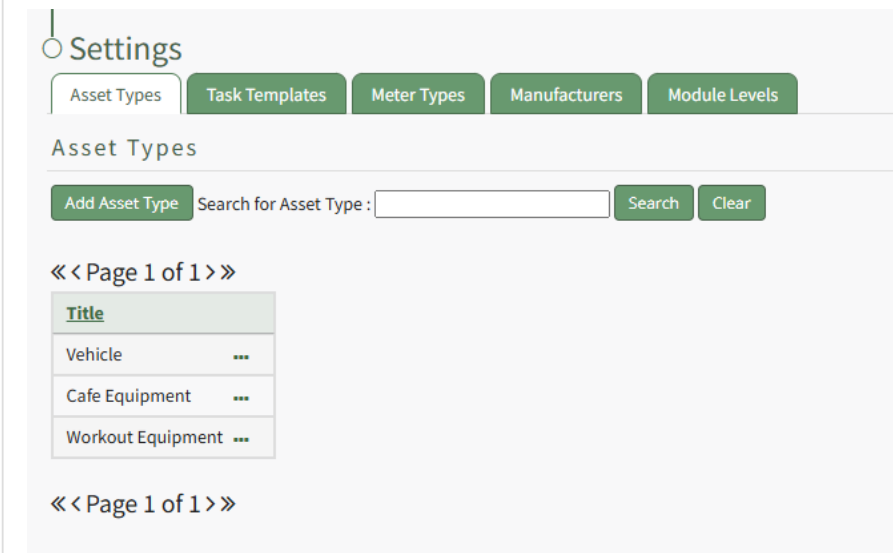
The “Send an alert when the asset changes to Past Due” checkbox will send an alert via email to all users assigned to the asset when the task status changes to past due (red).

Asset Types are customizable to your company and are created on the Settings Page of the Asset Module. Once an asset type has been created, you can select one from the dropdown menu in the New Asset Modal to enable additional filtering capabilities.

Asset Types allows your organization to add customizable fields unique to individual assets.

### How To: Create a New Asset Type

To create a new asset type, open the Asset Types Tab on the Settings Page of the Assets Module.



The screenshot shows the 'Settings' page with the 'Asset Types' tab selected. Below the tab navigation, there is a section titled 'Asset Types'. It includes an 'Add Asset Type' button, a search bar with the placeholder 'Search for Asset Type:', and 'Search' and 'Clear' buttons. Below this is a table with the following content:

| Title                 |
|-----------------------|
| Vehicle ...           |
| Cafe Equipment ...    |
| Workout Equipment ... |

Navigation links '« < Page 1 of 1 > »' are visible above and below the table.

Selecting the “Add Asset Type” button opens the New Asset Type modal.



The screenshot shows the 'New Asset Type' modal. It has a title bar with a close button. Below the title bar is a text input field labeled 'Title \*'. At the bottom of the modal are 'Save' and 'Cancel' buttons.

Input the title of the New Asset Type and click “Save”.

The newly created Asset Type will now show in the table on the Asset Type tab on the Settings page and is ready for you to add fields to.

### How To: Add Fields to an Asset Type

In order to include unique, customized additional information regarding an Asset, you must first create an asset type and then add fields to it. This allows your organization to specify whatever information they choose to regarding their assets.

### How To: Create a New Asset Type

To create a new asset type, open the Asset Types Tab on the Settings Page of the Assets Module.

Settings

Asset Types Task Templates Meter Types Manufacturers Module Levels

Asset Types

Add Asset Type Search for Asset Type : Search Clear

<< Page 1 of 1 >>

| Title             | ... |
|-------------------|-----|
| Vehicle           | ... |
| Cafe Equipment    | ... |
| Workout Equipment | ... |

<< Page 1 of 1 >>

Selecting the “Add Asset Type” button opens the New Asset Type modal.

New Asset Type X

Title \*

Save Cancel

Input the title of the New Asset Type and click “Save”.

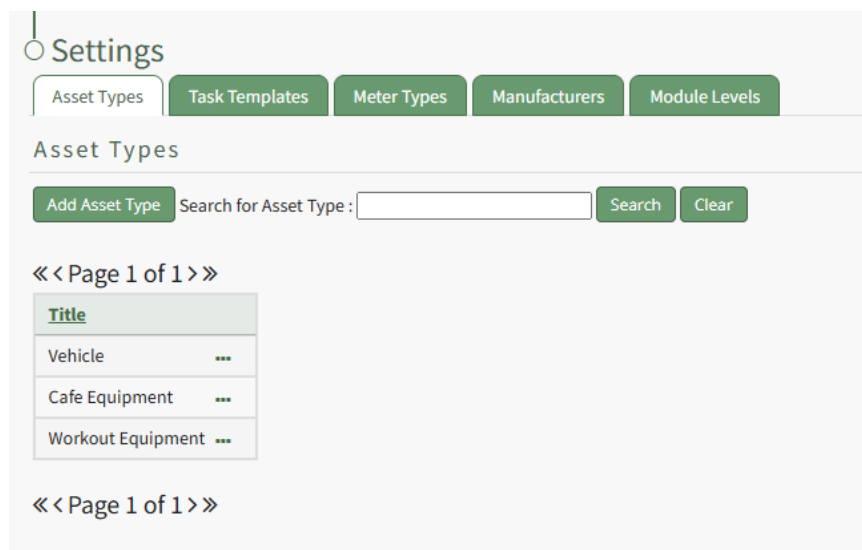
The newly created Asset Type will now show in the table on the Asset Type tab on the Settings page and is ready for you to add fields to.

## How To: Add Fields to an Asset Type

In order to include unique, customized additional information regarding an Asset, you must first create an asset type and then add fields to it. This allows your organization to specify whatever information they choose to regarding their assets.

### How To: Create a New Asset Type

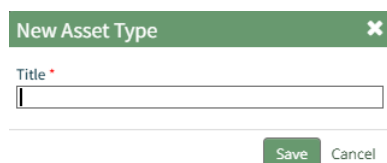
To create a new asset type, open the Asset Types Tab on the Settings Page of the Assets Module.



The screenshot shows the 'Settings' page with the 'Asset Types' tab selected. Below the tab bar, there is a search bar with the text 'Search for Asset Type :', a 'Search' button, and a 'Clear' button. Below the search bar, there is a table with the following data:

| Title                 |
|-----------------------|
| Vehicle ...           |
| Cafe Equipment ...    |
| Workout Equipment ... |

Selecting the “Add Asset Type” button opens the New Asset Type modal.



The screenshot shows the 'New Asset Type' modal. It has a title bar with a close button. Below the title bar, there is a text input field labeled 'Title \*'. At the bottom of the modal, there are 'Save' and 'Cancel' buttons.

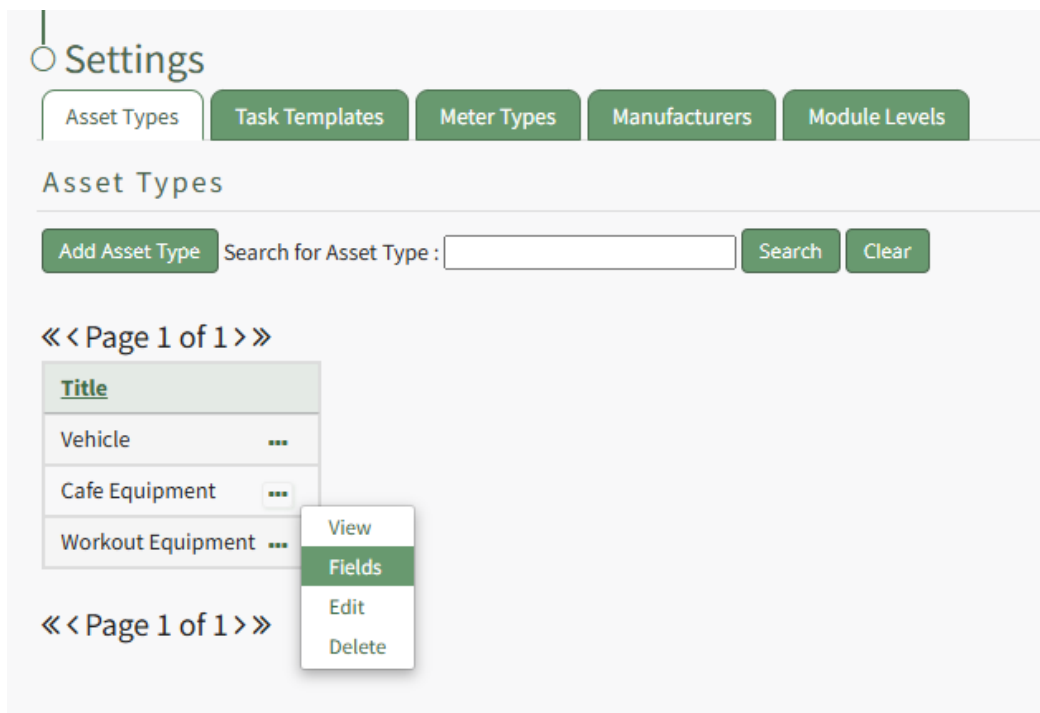
Input the title of the New Asset Type and click “Save”.

The newly created Asset Type will now show in the table on the Asset Type tab on the Settings page and is ready for you to add fields to.

## How To: Add Fields to an Asset Type

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To add additional fields to an asset type, go to the Asset Types Tab on the Settings Page of the Assets Module. Click the three-dot icon to the right of the Asset Type title to open the Asset Type Context Menu.



Select "Fields" from the context menu opening the Asset Type Fields Page.

## ◀ Fields for Cafe Equipment

Asset Types
Task Templates
Meter Types
Manufacturers
Module Levels

Add Field
Search for Field :
Search
Clear

« < Page 1 of 1 > »

|   | Label              |     | Field    | Validation |
|---|--------------------|-----|----------|------------|
| + | Power              | ... | text     |            |
| + | Cord Length        | ... | text     |            |
| + | Drainage Required  | ... | checkbox |            |
| + | Generator Required | ... | checkbox |            |

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Click the "Add Field" button opening the New Field Modal.

New Field

Label \*

Field Type
Text Field

Validation

Field / Validation Description

Save
Cancel

Input a label for the field and select the field type from a dropdown menu. Options include: text field, number, password field, text box, date field, and checkbox.

Validation uses standard JavaScript RegExp constructor for validating Field input values entered by end-users. Entering a RegExp validation string will check against the input value.

Include a description of the field of validation (optional).

Select "Save" and a popup confirms that the asset has been saved. The new field now shows on the Asset Type Field Page.

To add additional fields to an asset type, go to the Asset Types Tab on the Settings Page of the Assets Module. Click the three-dot icon to the right of the Asset Type title to open the Asset Type Context Menu.

The screenshot shows the 'Settings' page with the 'Asset Types' tab selected. Below the tab bar, there's a search bar with 'Add Asset Type' button, a search input, and 'Search' and 'Clear' buttons. A pagination indicator shows 'Page 1 of 1'. A table lists asset types with a three-dot menu icon next to each. The 'Workout Equipment' row has its context menu open, showing options: View, Fields (highlighted), Edit, and Delete.

| Title                 |
|-----------------------|
| Vehicle ...           |
| Cafe Equipment ...    |
| Workout Equipment ... |

- View
- Fields
- Edit
- Delete

Select "Fields" from the context menu opening the Asset Type Fields Page.

## ◀ Fields for Cafe Equipment

Asset Types

Task Templates

Meter Types

Manufacturers

Module Levels

Add Field

Search for Field :

Search

Clear

◀◀ Page 1 of 1 ▶▶

|   | Label              |     | Field    | Validation |
|---|--------------------|-----|----------|------------|
| + | Power              | ... | text     |            |
| + | Cord Length        | ... | text     |            |
| + | Drainage Required  | ... | checkbox |            |
| + | Generator Required | ... | checkbox |            |

◀◀ Page 1 of 1 ▶▶

Click the "Add Field" button opening the New Field Modal.

New Field

✕

Label \*

Field Type

Text Field

Validation

Field / Validation Description

Save

Cancel

Input a label for the field and select the field type from a dropdown menu. Options include: text field, number, password field, text box, date field, and checkbox.

Validation uses standard JavaScript RegExp constructor for validating Field input values entered by end-users. Entering a RegExp validation string will check against the input value.

Include a description of the field of validation (optional).

Select "Save" and a popup confirms that the asset has been saved. The new field now shows on the Asset Type Field Page.

Select the “Save” button at the bottom of the New Asset Modal to create the new asset or click “Cancel” to close the modal without saving and return to the Manage Assets Page.

After an asset is created, it will appear in the Manage Asset Table where it can be managed.

Manage Assets + ⋮

Filters

Search

Tags

☐ Show archived assets

☒ Show out of service assets and components

Set Filter

Clear

+ -

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| Title                                                          |   | Serial Number | Meters    | Tags | Status         |
|----------------------------------------------------------------|---|---------------|-----------|------|----------------|
| + Circuit Equipment                                            | ⋮ | 987CHD345     | No Meters |      | <span>●</span> |
| + Equipment                                                    | ⋮ |               | No Meters |      | <span>●</span> |
| - Jump at it Cafe <span>📍</span> <span>📅</span> <span>🔍</span> | ⋮ |               | No Meters |      | <span>●</span> |
| ↳ + Bar                                                        | ⋮ |               | No Meters |      | <span>●</span> |
| ↳ Refrigerator <span>⚠</span>                                  | ⋮ |               | No Meters |      | <span>●</span> |
| ↳ Tables and chairs                                            | ⋮ |               | No Meters |      | <span>●</span> |
| + Lockers                                                      | ⋮ |               | No Meters |      | <span>●</span> |
| Meter                                                          | ⋮ |               | No Meters |      | <span>●</span> |
| Sauna                                                          | ⋮ |               | No Meters |      | <span>●</span> |
| + Slow Flow Room                                               | ⋮ |               | No Meters |      | <span>●</span> |

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Complete Task

Record Fault

Update Meter Reading

Task Schedule

Run Report

History

Files

Edit

Manage Assignments

Add Component

Manage Components

Duplicate

Move

View

PDF Sheet

QR Code

Manage Meters

Cost / Time Summary

Archive

Identify the pre-existing asset (or component) that you would like to place this new component under, and click the three dot (...) icon to the right of the asset name in the Manage Assets table opening the Manage Asset Context Menu. Select "Add Component" opening the New Component Modal.

New Component

Title \*

Description

Tags

Select Some Options

Manufacturer

Model Number

Serial Number

☐ Critical Component

Critical Spares

☐ Allow users who are expired in assigned certification roles to perform tasks

☐ Send an alert when the asset changes from Past Due (red) to OK (green)

☒ Send an alert when the asset changes to Warn (yellow)

☒ Send an alert when the asset changes to Past Due (red)

Asset Type

Save

Cancel

The fields on the New Component modal ask for the same information on the New Asset Modal. For a detailed description of the fields, refer to the How To Create a New Asset page.

Select the “Save” button and the component will appear underneath its asset in the Manage Asset table (if the view is expanded) where it can be managed. Subcomponents/additional child components can also be created for components if desired.

Select the three dot (...) menu to the right of the component you would like to add an additional subcomponent in the asset’s hierarchal structure.

Revision #4

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