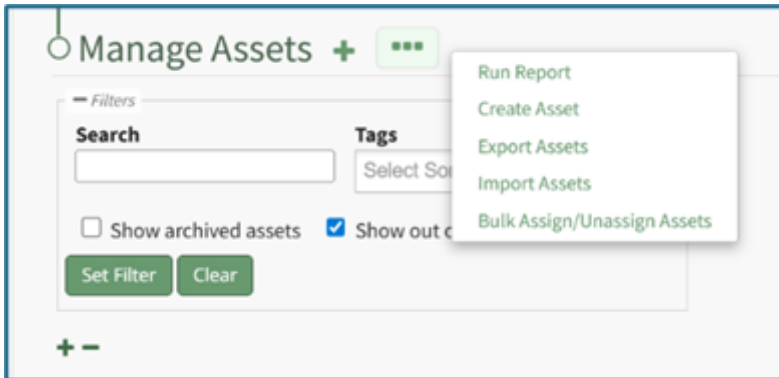


Create a New Asset

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.

A screenshot of the 'New Asset' modal form. It has a green header with the title 'New Asset' and a close button. The form contains several fields: 'Title' (required, marked with a red asterisk), 'Description', 'Tags' (with a 'Select Some Options' button), 'Manufacturer', 'Model Number', 'Serial Number', 'Critical Component' (checkbox), 'Critical Spares', 'Allow users who are expired in assigned certification roles to perform tasks' (checkbox), 'Send an alert when the asset changes from Past Due to OK' (checkbox), 'Send an alert when the asset changes to Warn' (checked checkbox), 'Send an alert when the asset changes to Past Due' (checked checkbox), and 'Asset Type' (dropdown menu). At the bottom right, there are 'Save' and 'Cancel' buttons.

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.

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

×

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.

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 ✕

Title *

Save Cancel

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Task Templates

Meter Types

Manufacturers

Module Levels

Asset Types

Add Asset Type

Search for Asset Type :

Search

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<< 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

Title *

Save

Cancel

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

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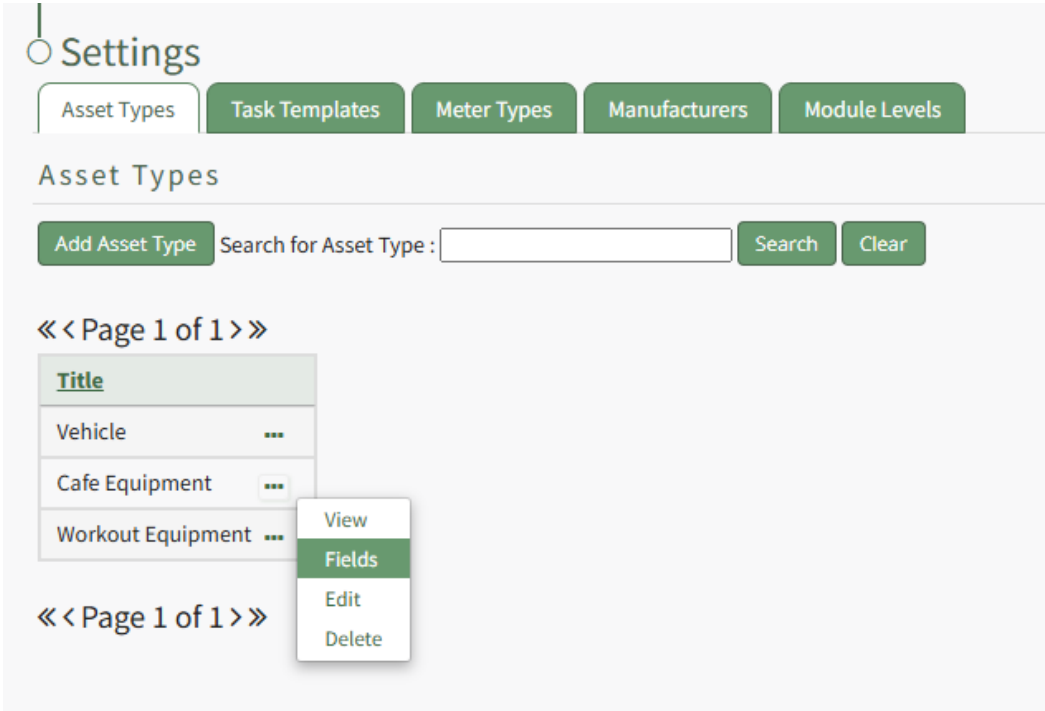
How To: Add Fields to an Asset Type

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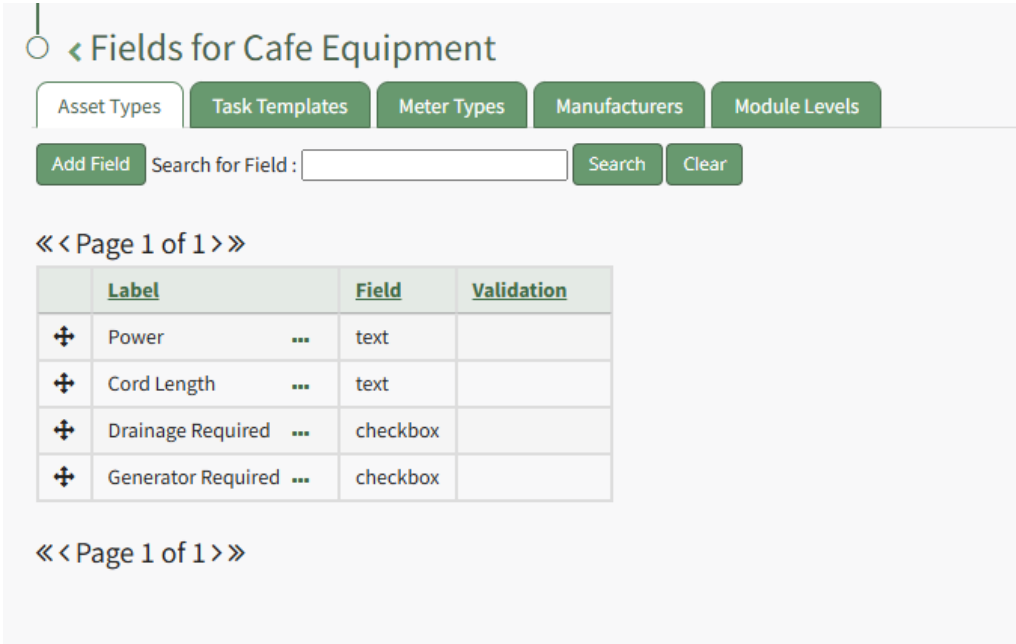
How To: Create a New Asset Type

{{@470}}

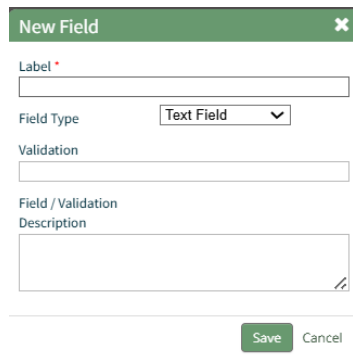
To add additional fields to an asset type, go to the Asset Types Tab on the Settings Page of the Assets Module. Click the three-dot icon to the right of the Asset Type title to open the Asset Type Context Menu.



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



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

The image shows a 'New Field' modal window. It has a green header bar with the title 'New Field' and a close button (X). Below the header, there are four input fields: 'Label' (with a red asterisk indicating it's required), 'Field Type' (a dropdown menu currently showing 'Text Field'), 'Validation' (a text input field), and 'Field / Validation Description' (a larger text input field with a small edit icon at the bottom right). At the bottom of the modal, there are two buttons: 'Save' (green) and 'Cancel' (white with a grey border).

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.

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 ...

View

Fields

Edit

Delete

« < Page 1 of 1 > »

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

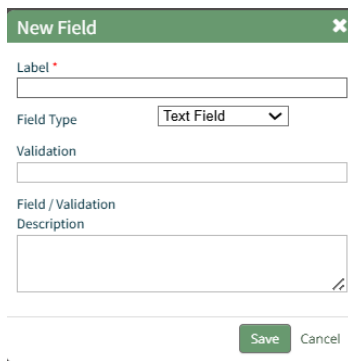
Clear

« < 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.

A screenshot of a 'New Field' modal window. The window has a green header bar with the title 'New Field' and a close button (X). Below the header, there are four input sections: 'Label' with a text input field and a red asterisk; 'Field Type' with a dropdown menu showing 'Text Field'; 'Validation' with a text input field; and 'Field / Validation Description' with a larger text input field. At the bottom of the modal, there are two buttons: 'Save' (green) and 'Cancel' (grey).

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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 > »

- View
- Fields
- Edit
- Delete

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< Fields for Cafe Equipment

Asset Types Task Templates Meter Types Manufacturers Module Levels

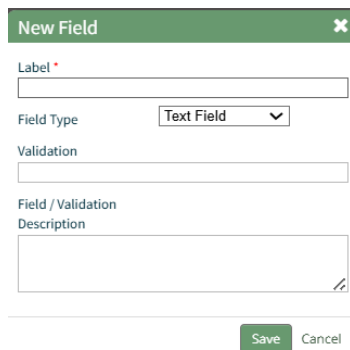
Add Field Search for Field : Search Clear

« < Page 1 of 1 > »

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

« < Page 1 of 1 > »

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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.

Revision #4

Created 2025-12-07 20:11:15 UTC by Mitzi Orkus

Updated 2026-01-23 17:00:59 UTC by Mitzi Orkus