

Introducing the...

For (Electrical) Tagging Management Database



Overview

The *For (Electrical) Tagging Management (FTM)* database allows businesses and organisations to manage data relating to:

- Assets.
- Asset Maintenance, including Electrical Testing and Tagging.
- Asset Loans.



The Primary User

- Assets
- Asset Maintenance
- Asset Loans
- Reminders
- Login

▲ ▼

- Defaults
- Data File Management
- Introducing
- Exit

For Tagging Management - Electrical Testing & Tagging

Purpose

The purpose of this database is to allow you to record details of various assets such as electrical items - electrical tools, office equipment, kitchen appliances - as well as items such as furniture, vehicles, etc.

Against these various items can be recorded scheduled and completed maintenance such as electrical testing and tagging, as well as loan management details.

Getting Started

A menu is presented on the left side of the screen. Click each menu item in turn and familiarise yourself with the various components within the application.

It is suggested that you begin with the menu item titled: Defaults.

Click on the Print Help button below to view and print selected help details for this application.



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Assets - List

The primary component of the *FTM* database is the Asset Management component. On clicking on the *Assets* link on the Main Menu, the **Assets List Screen** will be displayed allowing you to:

- *sort* the asset list using the buttons at the top of the screen,
- *filter* the assets with the filter options at the bottom of the screen,
- *add/edit* selected asset details and/or...
- *select* an asset in the centre of the screen by double clicking on a asset's Item Title field.

Asset Code	Item Title	Make	Model	Asset Type	Location	Status
1001	Laptop 1	Make	Model	Computing Equipmer	Warehouse	Available
1002	Kitchen Fridge	Fridge Make	Fridge Model	Whitegood	Head Office	Permanently Located
1003	Server Computer	Server Make	Server Model	Computing Equipmer	Head Office	Permanently Located
1004	Laptop 2	Make	Model	Computing Equipmer	Head Office	Booked
1005	Delivery Van	Van Make	Van Model	Vehicle	Warehouse	Booked

(NOTE: The double click field is identified by the darker background colour)

Assets - Detail

Once an asset is selected, you are able to add and edit such details as:

- **General Asset details** – title, make, model, serial number, asset type, location, etc.
- **Asset Maintenance** - date due, date completed, type, completed by, and other notes.
- **Asset Loans** - date required, date due, date returned, loaned by, and other notes.

(NOTE: Double click fields are identified by grey background colouring within the fields. EG: the various date fields, etc.)

Asset Code	Item Title	Make	Model	Asset Type	Location
1001	Laptop 1	Make	Model	Computing Equipmer	Warehouse
1002	Kitchen Fridge	Fridge Make	Fridge Model	Whitegood	Head Office
1003	Server Computer	Server Make	Server Model	Computing Equipmer	Head Office
1004	Laptop 2	Make	Model	Computing Equipmer	Head Office
1005					

Asset Name:	Laptop 1	Purchase Date:	Monday, 13 June 2011
Asset ID / Code:	1001	Purchase Price:	\$700.00
Make:	Make	Asset Status:	Available
Model:	Model	Disposal Date:	
Serial Number:	1234 11 22	Disposal Price:	\$0.00
Asset Type:	Computing Equipment	Current Value:	\$1,250.00
Usual Location:	Warehouse		

Photo / Notes | Tagging/Maintenance Log | Loan

Photo: CTRL_V - to paste image

Description / Notes: CTRL_Enter - new line

Assets Document Folder

To DELETE an entry: click on the grey record selector to the left of the entry you need to delete, and press the Delete key on the keyboard.

Record: 1 of 5

Lists | New | Help | Close

Assets – Maintenance

Asset Maintenance can be added in advance of a service or testing and tagging – for scheduling future maintenance. It can then be updated once the maintenance has been completed.

The maintenance data is added via the **Tagging / Maintenance Log** tab as shown right.

(Note: Maintenance due and maintenance history can be viewed on a separate Asset Maintenance List screen.)

The screenshot displays the 'Asset Details' window with the following fields:

- Asset Name: Laptop 1
- Asset ID / Code: 1001
- Make: Make
- Model: Model
- Serial Number: 1234 11 22
- Asset Type: Computing Equipment
- Usual Location: Warehouse
- Purchase Date: Monday, 13 June 2011
- Purchase Price: \$700.00
- Asset Status: Available
- Disposal Date: (empty)
- Disposal Price: \$0.00
- Current Value: \$1,250.00

The 'Tagging/Maintenance Log' tab is active, showing a table with the following data:

Date Due	Completed	Maintenance Type	Maintenance Detail	Current Location	C
25-Sep-13		Tagging	Laptop Servicing	Head Office	C
25-Jun-13	26-Jun-13	Tagging	Laptop Servicing	Head Office	C
*		Not Defined		Not Defined	N

At the bottom, there is a status bar showing 'Record: 1 of 5' and a set of navigation buttons. A note states: 'To DELETE an entry: click on the grey record selector to the left of the entry you need to delete, and press the Delete key on the keyboard.'

Assets - Loans

Asset Loans can be added in advance of a loan and then updated once the loaned asset has been returned.

The loan data is added via the **Loan** tab as shown right.

The screenshot shows the 'Asset Details' window with the 'Loan' tab selected. The asset information is as follows:

Asset Name:	Delivery Van	Purchase Date:	
Asset ID / Code:	1005	Purchase Price:	\$0.00
Make:	Van Make	Asset Status:	Booked
Model:	Van Model	Disposal Date:	
Serial Number:		Disposal Price:	\$0.00
Asset Type:	Vehicle	Current Value:	\$0.00
Usual Location:	Warehouse		

The 'Loan' tab contains a table with the following data:

Staff / Contact	Current Location	Date Borrowed	Due Date	Date Returned	Notes
Warehouse	Warehouse	16-Apr-13	15-Apr-14		Permanent Booking
Warehouse	Warehouse	16-Apr-12	15-Apr-13	15-Apr-13	Permanent Booking
	Not Defined				

At the bottom of the window, there are buttons for 'Lists', 'New', 'Help', and 'Close'. A status bar at the very bottom shows 'Record: 5 of 5'.

Asset Maintenance - List

Once *Asset Management* has been added via the Asset Detail screen, maintenance due and/or maintenance history can be viewed via the Asset Maintenance List screen.

You are able to access this component via the main menu link: **Asset Maintenance**.

This list screen allows you to:

- *sort* the maintenance listing using the buttons at the top of the screen,
- *filter* the maintenance with the filter options at the bottom of the screen – eg: view maintenance that has been completed or is not yet complete.
- *Double click on* and view detail of a given maintenance entry.

Asset Name	Make	Model	Date Due	Date Completed
Delivery Van (1005)	Van Make	Van Model	14/08/2012	17/08/2012
Laptop 1 (1001)	Make	Model	25/06/2013	26/06/2013
Kitchen Fridge (1002)	Fridge Make	Fridge Model	12/07/2013	12/07/2013
Laptop 1 (1001)	Make	Model	25/09/2013	
Kitchen Fridge (1002)	Fridge Make	Fridge Model	12/10/2013	
*				

Search String: 5

Date Due Between: 1/08/2011 To: 1/09/2015

View: All

Location: All

Completed By: Not Completed

Completed

Print New Help Close

Asset Loans - List

Once *Asset Loans* have been added via the Asset Detail screen, loans due and loan bookings can be viewed via the Asset Loans List screen.

You are able to access this component via the main menu link: **Asset Loans**.

This list screen allows you to:

- *sort* the loan entries listing using the buttons at the top of the screen,
- *filter* the loan entries with the filter options at the bottom of the screen – eg: view loans history (*returned items*) and/or assets not yet returned.
- *Double click on* and view detail of a given loan entry.

Asset Name	Make	Model	Date Borrowed	Due Date	Date Returned
Delivery Van (1005)	Van Make	Van Model	16/04/2012	15/04/2013	15/04/2013
Laptop 1 (1001)	Make	Model	15/06/2013	24/07/2013	22/06/2013
Laptop 2 (1004)	Make	Model	9/04/2013	11/04/2014	
Delivery Van (1005)	Van Make	Van Model	16/04/2013	15/04/2014	
*					

Search String:

Due Date Between: To: 4


View:

Print New Help Close

Assets - Reporting

There are quite a number of list reports within FTM for various purposes:

- *Asset Listings* - with minimal and extended detail.
- Various *Maintenance and Loan* listings.
- Asset listings, grouped by *Type and/or Location* for stocktake purposes.

Assets by Location and Type							Stocktake Listing
Search String:				The Primary User			
Asset Type:	All			Street Address, Suburb State Postcode			
Location:	All			Phone: Ph Number, Fax: Fax Number			
Status:	All			Email: Your email Account			
Title:	ID/Code:	Make:	Model:	Serial Number:	Status:	Located / Note:	
Head Office							
Computing Equipment							
Laptop 2	1004	Make	Model		Booked	<input type="text"/>	
Server Computer	1003	Server Make	Server Model		Permanently Located	<input type="text"/>	
Whitegood							
Kitchen Fridge	1002	Fridge Make	Fridge Model		Permanently Located	<input type="text"/>	
Warehouse							
Computing Equipment							
Laptop 1	1001	Make	Model	1 234 11 22	Available	<input type="text"/>	
Vehicle							
Delivery Van	1005	Van Make	Van Model		Booked	<input type="text"/>	
Number of Entries: 5							

Setting Up: Defaults

FTM allows for a fair degree of customisation. Much of this should be addressed on initial setup.

In the *Defaults* component, you are able to add/edit/set:

- **Your organisation's Details** (*Defaults tab*) – name, address, phones, business logo, etc (*which appear on multiple reports*).
- **Application Preferences** (*Application tab*) – screen sizes, formats, registration code, etc.

The screenshot shows a software interface for configuring defaults. On the left is a navigation menu with a green arrow logo and the text 'Electrical Testing and Tagging'. The menu items are: 'The Primary User' (highlighted), 'Assets', 'Asset Maintenance', 'Asset Loans', 'Reminders', 'Login', 'Defaults', 'Data File Management', 'Introducing', and 'Exit'. The main window is titled 'Defaults' and has three tabs: 'Defaults', 'Application', and 'File Paths'. The 'Defaults' tab is active and contains several input fields: 'User Name' (set to 'The Primary User'), 'Street' (set to 'Street Address'), 'Suburb' (set to 'Suburb'), 'State' (set to 'State') and 'Post Code' (set to 'Postcode'). There are also fields for 'Phone 1', 'Phone 2', 'Fax', and 'Mobile', all set to 'Ph Number', 'Ph Number', 'Fax Number', and 'Mobile No' respectively. An 'Email' field is set to 'Your email Account' and a 'WWW Site' field is set to 'Your Web Site'. A 'Period between scheduled maintenance events (mnths):' field is set to '3'. A 'Report Logo Graphic' section shows a preview of the green arrow logo and the text 'Electrical Testing and Tagging'. Below this, a 'Reports Produced By:' field is set to 'For Tagging Management'. At the bottom right, there are two checkboxes: 'Select Colour:' and 'Backup Your Default Settings?' (unchecked). Below these are three buttons: 'Detail Screen', 'Popup Screen', and 'Close'.

Setting Up: Drop-Down Lists

You are able to categorise your assets etc with a range of drop-down (*combo box*) selections.

For instance, in looking at the *Asset Detail* screen there are drop-down boxes provided for such fields as:

- Asset Type
- Location
- Status
- Maintenance Type.

The entries in these various drop-down lists would be entered via a facility known as: '*Admin Lists*' – (see the following page).

The screenshot shows the 'Asset Details' window with the following fields:

Asset Name:	Laptop 1	Purchase Date:	Monday, 13 June 2011
Asset ID / Code:	1001	Purchase Price:	\$700.00
Make:	Make	Asset Status:	Available
Model:	Model	Disposal Date:	
Serial Number:	1234 11 22	Disposal Price:	\$0.00
Asset Type:	Computing Equipment	Current Value:	\$1,250.00
Usual Location:	Warehouse		

Below the fields is a table with tabs for 'Photo / Notes', 'Tagging/Maintenance Log', and 'Loan'. The 'Tagging/Maintenance Log' tab is active, showing a table with the following data:


Date Due	Completed	Maintenance Type	Maintenance Detail	Current Location	
25-Sep-13		Tagging	Laptop Servicing	Head Office	C
25-Jun-13	26-Jun-13	Tagging	Laptop Servicing	Head Office	C
*		Not Defined		Not Defined	N

At the bottom of the window, there is a status bar showing 'Record: 1 of 5' and buttons for 'Lists', 'New', 'Help', and 'Close'. A note at the bottom reads: 'To DELETE an entry: click on the grey record selector to the left of the entry you need to delete, and press the Delete key on the keyboard.'

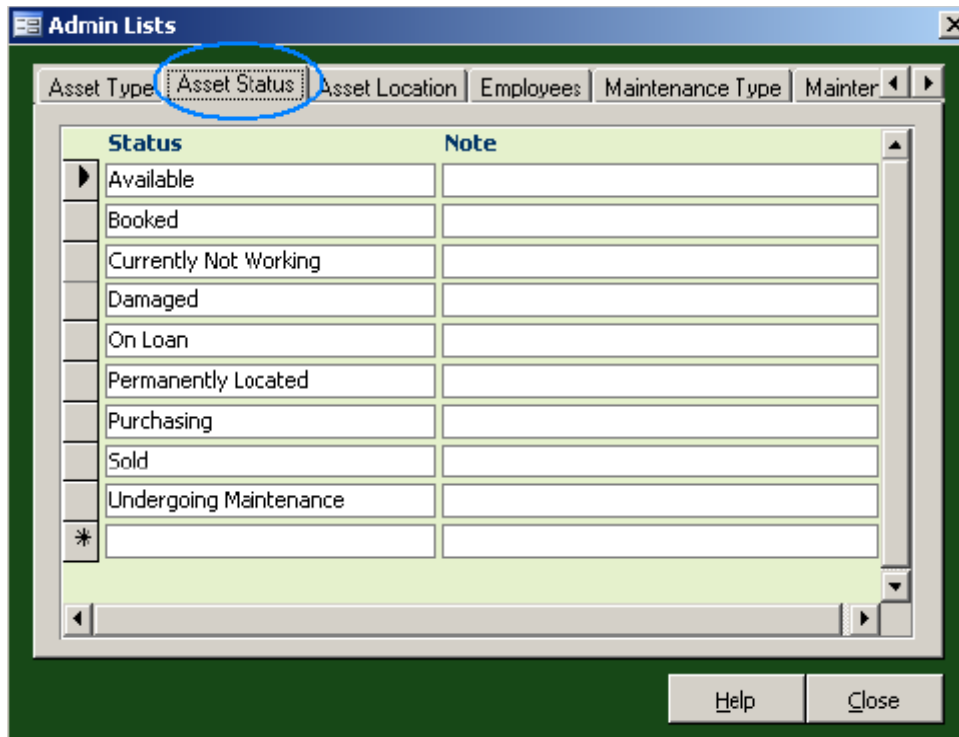
Setting Up: Admin Lists

- To add/edit entries within the various drop-down lists, the Assets and Reminders components each have a popup *Admin Lists* screen.
- *It is best* if entries for these various lists are decided on, agreed to and entered into the database *before using the system*.

For instance, open the *Asset Detail* screen and click on the **Lists** button

 at the bottom of the screen. Tabs have been included to allow you to add/edit entries for drop-down lists such as:

- Asset Type
- Asset Status
- Asset Location
- Employee
- Maintenance Type
- Maintenance Completed By



The screenshot shows the 'Admin Lists' window with the 'Asset Status' tab selected. The window contains a table with the following data:

Status	Note
▶ Available	
Booked	
Currently Not Working	
Damaged	
On Loan	
Permanently Located	
Purchasing	
Sold	
Undergoing Maintenance	
*	