

How to add an asset?

help2.fractal.com/hc/en-us/articles/25013544567693-How-to-add-an-asset

There are 2 methods adding assets to the Fractal platform:

- Method 1 – Manually (one by one directly in the platform)
- Method 2 – meaning a Bulk Import (through importing excel based import sheets)

(Note: refer to the imports section on how to add a group / bulk assets)

Method 1: Adding assets manually

In order to add an asset manually in the system:

1. Enter the asset type view corresponding to the asset type you want to add (Locations, Equipment, Tools, Spare Parts and Supplies, Digital) or simply hover over the “Add” button at the bottom right corner of the “All Assets” view and select the preferred asset type import.

The screenshot displays the 'Locations' management interface. At the top, there is a search bar and a 'Search...' input field. Below the search bar, there are navigation options for 'List' and 'Treemap'. The main area contains a table with columns for 'Enabled', 'Out of Service', 'Description', 'Name', 'Address', and 'City'. The table lists various assets with their respective status and details. A red box highlights a blue '+' button in the bottom right corner, which is used to add new assets.

Enabled	Out of Service	Description	Name	Address	City
<input type="checkbox"/> Yes	<input type="checkbox"/> No	000R1CEV { 99874bis } España	000R1CEV		
<input type="checkbox"/> Yes	<input type="checkbox"/> No	101 { pfi39 } España VALENCIA	101		VALENCIA
<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	102 { 102-S12 } España	102		
<input type="checkbox"/> Yes	<input type="checkbox"/> No	102 { 102-WS03 } Chile	102		
<input type="checkbox"/> Yes	<input type="checkbox"/> No	102 { 102-WS } Panama	102		
<input type="checkbox"/> Yes	<input type="checkbox"/> No	1035537 - Rotary union assembly { CLISEILINTUNTUN1TB...	1035537 - Rotary union assembly		
<input type="checkbox"/> Yes	<input type="checkbox"/> No	1052561 - Cutterhead assy { CLISEILINTUNTUN1TB...	1052561 - Cutterhead assy		
<input type="checkbox"/> Yes	<input type="checkbox"/> No	1052572 - Hydraulic schematic { CLISEILINTUNTUN1TB...	1052572 - Hydraulic schematic		
<input type="checkbox"/> Yes	<input type="checkbox"/> No	105374 - Bentonite system { CLISEILINTUNTUN1TB...	105374 - Bentonite system		
<input type="checkbox"/> Yes	<input type="checkbox"/> No	1053752 - Lube Schematic { CLISEILINTUNTUN1TB...	1053752 - Lube Schematic		
<input type="checkbox"/> Yes	<input type="checkbox"/> No	1053754 - Excluder grease schematic { CLISEILINTUNTUN1TB...	1053754 - Excluder grease schematic		
<input type="checkbox"/> Yes	<input type="checkbox"/> No	1053755 - Automatic grease lubrication system { CLISEILINTUNTUN1TB...	1053755 - Automatic grease lubrication syst...		
<input type="checkbox"/> Yes	<input type="checkbox"/> No	1053756 - Tail grease diagram { CLISEILINTUNTUN1TB...	1053756 - Tail grease diagram		
<input type="checkbox"/> Yes	<input type="checkbox"/> No	1053757 - Water Schematic { CLISEILINTUNTUN1TB...	1053757 - Water Schematic		

2. An add new asset window will open to fill in all the required fields attributed to the asset in the “General” tab. (These attributes may vary depending on the type of asset we are dealing with).

Here's a brief explanation of each of the attributes found in the assets window:

General: A tab where you can find all the general information associated with the asset.

1. **Equipment name:** Refers to the name with which the asset is identified.
2. **Model:** Refers to the model of the asset.
3. **Serial number:** Refers to the serial number associated with the asset (usually the one established by the equipment manufacturer is used).
4. **Code:** A unique identification code assigned to the asset by the user within the system.
5. **Bar code:** The bar code of the asset.
6. **Priority:** A function that allows the assets to be catalogued according to their priority.
7. **Type:** Associates the asset with its particular asset grouping / type.

8. **Classification 1 and 2:** Refer to the free fields left by the platform for users to classify the asset completing them as required.
9. **Provider:** The provider associated with the asset.
10. **Purchase Date:** The date on which the asset was purchased.
11. **Located in or is part of:** Corresponds to the location where the asset is located within the system.
12. **Hours of average daily use:** Refers to the total average daily operating hours performed by the asset (by default the system establishes 24 hours of daily use). This value is extremely important for the calculation of the indicators in the system.
13. **Visible to all:** An option that permits asset-viewing rights for all users regardless of the hierarchical level of the user account.
14. **Planned Maintenance:** Refers to the maintenance task plan to which the asset is linked.
15. **Notes:** Text type fields where you can add a note associated with the asset.
16. **Photo:** belonging to the asset in question.
17. **QR Code:** a code automatically generated by the system once the asset is created.

Custom Forms: custom fields / groups in which assets can be categorized by utilizing a common set of fields or labels that can be created and customized as required. This option is ideally used for asset information that cannot be added in the general tab, such as the technical specifications of the equipment.

Financial: Corresponds to the linear depreciation of the asset, which is calculated based on the start date, percentage of annual depreciation, purchase, replacement, and salvage costs.

Suppliers of the product: List where the third parties that are associated with the asset can be added as a reference.

Spare Parts and Supplies: List where the Spare Parts and Supplies used in the asset can be added as a reference.

Histories: Tab where you can view the history of tasks, resources, and availability associated with the asset.

Attachments: Tab where you can add the different attachments associated with the asset.

Document Management: Tab where you can add the different documents or guarantees subject to expiration associated with the asset.

Active: Option that allows you to enable or disable an asset so that it appears / disappears in maintenance activities.

Out of Service: State in which an asset is stopped due to a functional failure (this option comes directly from the asset failure)

Note: The information shown above is referential for equipment-type assets. Certain attributes may vary depending on the type of asset to which information is being added.

3. Finally, after completing all the fields required to register the asset, click on the “Save” button to finish the asset creation process.

The screenshot shows a web interface for asset management. At the top, there are navigation elements: a hamburger menu, 'Assets Equipment', 'Old Version', and user profile icons. The main content area is titled '{ ROB-0001 } ROBO - 0001 FANUC'. On the left, there is a sidebar with a photo of a yellow robot arm, a toggle for 'Out of Service: Yes' (set to 'Enabled'), and a list of tabs: 'Information' (with a note 'You have pending changes to save!'), 'Details', 'General', 'Custom Form', 'Health Status' (marked 'Beta'), 'Financial', 'Third Parties', 'Spare Parts and Supplies', 'Historical', and 'Attachments'. The main form contains the following fields: 'Is part of' (// Montadora - Elias Corp/ USINAGEM DE MOTORES/ USINAGEM DE CABEÇOTES/), 'Nombre de equipo' (ROBO - 0001), 'Code' (ROB-0001), 'Fabricante' (FANUC), 'Modelo' (6 motores), 'Número de serial' (325413455), 'Otro 1' (1500w), 'Otro 2' (380V), 'Barcode' (43534656542), 'Priority' (Very High), 'Type' (Robot), 'Group 1' (Auxiliary), 'Group 2' (mechanical), 'Supplier' (Servicios Electricos SA), 'Purchase date' (2024-02-22), 'Hours of average daily use' (24:00), 'Visible to all' (checkbox), 'Planned Maintenance' (Plano de Tarefas - Montadora Elias Corp), and 'Public QR'. A 'Save' button is highlighted in a red box in the top right corner. A small note at the bottom states: 'It only allows to add the valid format of Or Public (https://one.fractal.com/or/xxx)'.