Essentials Edition

Version: 1.0

Technical assets

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About Technical assets

In the Essentials Edition there are two TSIs, **Assets** and **Technical assets**. The Technical assets TSI enables you to register and retrieve data of your company's assets, such as installations, systems, furniture and other assets.

The Technical assets TSI helps you to locate each individual asset in a property and provides information on when it needs to be maintained or replaced. The assets concerned are always linked to a property and classed into logical groups.

Technical assets - Concepts

This section describes the concepts available in the Technical assets TSI and how they interact with each other.

Assets

Assets can be all kinds of corporate items of value, from furniture to mechanical installations, or from company clothing to company cars. They always belong to a specific property and asset group.

Assets are hierarchical elements. That means that they can be subdivided into different levels. The maximum number of levels is 10. Using a hierarchical structure for assets, enables you to specify any subassets of which an asset may consist. For example, you can register a pump via the components it consists of.

You can register location data for an asset. You can also specify whether the asset is a simple or a multiple asset.
For each technical asset, you can link a standard service plan that includes all the activities needed for the asset's preventative maintenance.

Multiple assets

Identical assets can be registered as a *multiple asset*. This type of registration is also possible if the multiple asset is scattered over different properties and locations.
This prevents repetitive data registration, as you only need to enter one asset record.
For example, if you have registered 100 identical office chairs as a multiple asset, which is distributed over several rooms or buildings, you can assign different locations to the individual assets or clusters of assets (at **Asset details** > **Asset locations**).

You can register a multiple asset by selecting **No** in the **Assets** > **Simple** field.

Building elements

An essential component of a building that protects the building occupants and whose quality affects the indoor environment.
Examples: roofs, doors, floor slabs, walls, and windows.
Building elements require condition-based maintenance. Building elements are added at the **Assets** selection level in Technical assets TSI.

Asset groups

Asset groups are used to categorize assets into logical groups such as Mechanical, Electrical, Furniture etc. An asset group has a hierarchical structure, which may have a maximum of 10 levels. An asset group is not linked to a particular property, so the classification into groups is the same for all properties.

Asset classification

A functional and hierarchical grouping of assets that requires planned preventative maintenance. The individual items in the asset classification have their own descriptions and codes.
Asset classifications are added and maintained in Supporting data . You can use different methods of asset classification for different types of assets. Example: Roofs, Ceilings, Walls, Lighting, Security etc.

> 💡 Asset classifications are only applicable in the Technical assets TSI for Building elements and M&E assets.

Asset and building element statuses

Assets and building elements can exist in various statuses. The possible status transitions available to an asset or building element depend on their current status.

For details on how to change an asset's or building element's status, refer to Changing an asset's or a building element's status.

For a description of the available statuses, refer to Asset and building element statuses.

Communication logs

Communication logs are records of communication regarding an item that is added to Essentials Edition . These records are added manually in the respective TSIs and they can include all types of communication such as emails, faxes, reports, transcriptions of phone calls etc.

You can upload documents as reference or even include a link to a URL, which will always open in a separate browser window.

Communication logs can be added for many types of elements in Essentials Edition , for example orders (all order types), properties, visitors, budgets, invoices and so on.

Expected costs

There are three types of costs: additional costs, material costs and man-hour costs only in Technical assets . The cost lines of the activity definition are used to calculate the actual costs of the ensuing maintenance orders.
Expected costs can be added to an activity definition at **Activity details** > **Expected costs**.

> ℹ️ For details on adding expected costs to maintenance activity definitions, refer to *Planned Maintenance* .

Locations

Locations help you track down the property and space where an asset is located. Since multiple locations can be linked to multiple assets, you can register all the different spaces where (clusters of) multiple assets are located. The number of individual assets present can be specified for each location.

Maintenance activities

Maintenance activities for assets (resulting from activity definitions) are shown in Technical assets > **Activity details** > **Maintenance activities**. These maintenance activities are created automatically by Essentials Edition as soon as you add a *schedule* to an activity definition in the **Maintenance Planner** TSI. When a maintenance activity is completed, the condition of the linked asset is updated.

> For details on maintenance activities and on generating orders for the activities of an activity definition, refer to the Planned Maintenance documentation.

Standard assets

A standard asset is a 'template' asset that you can use to speed up the process of adding a new asset. If you add an asset based on a standard asset, many asset fields are automatically populated.
You can use standard assets in TSIs Technical assets and Assets.

> Planon administrators can add, copy, delete, modify or archive standard (sub) assets in **Supporting data** > **Asset library**.

Standard building elements

A standard building element is a 'template' building element that you can use to speed up the process of adding a new building element. If you add a building element based on a standard building element, many fields are automatically populated.
You can use standard building elements in Technical assets TSI.

Standard service plans

A standard service plan helps you to efficiently plan preventive maintenance that applies to larger numbers of assets.
Standard service plans are used in the **Maintenance planner** TSI to compile a maintenance plan.

> ℹ️ For more information on adding and maintaining standard service plans or compiling maintenance plans, refer to *Planned Maintenance* .

A standard service plan (together with its standard activity definitions) can be linked to an asset at the **Assets** > **Link standard service plan** action panel.
You can view linked standard service plans at **Asset details** > **Linked standard service plans**.
If you want to have a read-only view of all available standard service plans, go to **Asset details** > **Standard service plans**.

> 💡 Standard service plan is only available for Technical assets TSI.

Standard activity definitions

A 'template' including detailed data on the preventative maintenance of a particular asset. Standard activity definitions are linked to an asset via a standard service plan. Standard activity definitions are used in the **Maintenance planner** TSI to compile maintenance plans.

Standard activity definitions are added and maintained in **Supporting data** > **Maintenance library**.

You can have a read-only view of all available standard activity definitions at **Technical assets** > **Activities/registrations**.

> ℹ️ For more information on entering data for a standard maintenance activity, refer to *Planned Maintenance > Adding activity definitions*.

Working with Assets and Building Elements

This section gives information on which asset data can be registered and which actions are available for asset groups, assets and building elements.

Classification into asset groups

You can maintain **Asset groups** at Supporting data > **Asset groups** TSI.

New assets/building elements can be added to an asset group in Assets TSI on Filters selection level, by selecting a relevant group and going to the **Assets** selection level, where you can add new assets / building elements.

Refer to Asset group data fields for field descriptions.

Adding assets

You can add, modify or delete assets.

Procedure

1. At **Assets**, click **Add** on the **Assets** action panel.
2. Complete the relevant fields on the data panel.

   For more information on the available fields, refer to Asset data fields.

3. Click **Save**.

> 💡 Assets can also be copied. The copying action for assets is rather complex. Refer to Deep copying assets.

Adding an asset based on a standard asset

Assets based on standard assets are added at the **Assets** selection level.

Procedure

1. On the action panel, click **Add standard asset**.
2. In the **Add standard...** dialog box, select a standard asset and a property in the relevant fields.
3. Select the relevant option(s), to include:

   ◦ subasset(s)

   ◦ standard service plans

   ◦ standard asset components

- defect lists for standard assets

4. Click **OK**.
5. Complete the relevant fields on the data panel.

   For more information on the available fields, refer to Asset data fields.

6. Click **Save**.

Adding standard subassets

If you add an asset that is based on a standard asset from the **Asset library**, you can optionally include subassets and other linked items. If you initially decided not to include subassets, but change your mind later on, you can use the **Add standard subasset** action.

Procedure

1. In the **Assets** elements list, select the asset (based on a standard asset from the **Asset library**), to which you want to add one or more *standard subassets*.
2. On the action panel, click **Add standard subasset**.

   A dialog box is displayed, listing the available standard subassets.

3. Select the standard subasset you want to add to the selected asset.
4. If you also want to include any subs of the subasset (third hierarchical level and lower), make sure you check the **Include subassets** option.
5. Select any other options you want to include: service plans, asset components, defects lists.
6. Click **OK**.
7. On the action panel, click **Save**.

   The selected subasset (with optional subs) is added to the main asset.

Adding building elements

Building elements are added in Technical assets , at the **Assets** selection level.

> Like regular assets, building elements have locations. When you add a building element, a location is also automatically created in the Essentials Edition database. However, this location cannot be viewed anywhere in the user interface. The data on a building element's location is used when compiling maintenance plans, for example.

Procedure

1. At **Assets**, click **Add building element** on the action panel.
2. Complete the relevant fields in the data section.

   For more information on the available fields, refer to Asset data fields.

3. Click **Save**.

    If required, you can add sub-building elements to the building element.

Adding a building element based on a standard building element

You can add building elements that are based on standard building elements in Technical assets , at the **Assets** selection level.

Procedure

1. On the action panel, click **Add Standard building element**.
2. In the **Add standard...** dialog box, select a standard building element and a property in the relevant fields.
3. Select one or more of the options to include:
   - ◦ sub-building element(s)
   - ◦ standard service plans
   - ◦ defect lists for standard building elements
4. Click **OK**.
5. Complete the relevant fields on the data panel.

   For more information on the available fields, refer to Asset data fields.
6. Click **Save**.

Adding standard sub-building elements

If you add a building element that is based on a standard building element from the **Asset library**, you can also include any sub-building elements and other linked items. However, if you initially decided not to include any sub-building elements, but change your mind later on, use the **Add standard sub-building element** action.

Procedure

1. In the **Assets** elements list, select the building element to which you want to add one or more *standard sub-building elements*.

> 💡 As mentioned above, this building element must itself be based on a *standard building element* from the **Asset library**.

2. On the action panel, click **Add standard sub-building element**.

   A dialog box is displayed, listing the available standard sub-building elements.
3. Select the standard sub-building element you want to add to the selected building element.
4. If you also want to include any subs of the sub-building element (third hierarchical level and lower), make sure you check the **Include sub-building elements** option.
5. Select any other options you want to include: service plans, defects lists.
6. Click **OK**.
7. On the action panel, click **Save**.

The selected sub-building element (with optional subs) is added to the main building element.

Filtering on assets or building elements

If you want to filter the elements list either by assets or by building elements, do the following:

Procedure

1. Go to **Assets**.
2. In the filter bar, select **Add filter**.
3. In the **Select filter criteria** dialog box, enter a filter name in the **Filter name** field.
4. In the **User-defined type** field, enter **=** and select the relevant user-defined type.
5. Click **Save**.

   If you apply this filter, the elements list only displays the selected type.

Showing related assets

If you want to view the assets in their 'family context' (parent / child / sibling asset), click the **Show related assets** button to display the related main assets and sub assets.

It is possible to view the related assets of one or more assets at the same time in the Base asset list.

Procedure

1. Go to **Assets**.
2. Select one or more assets for which you want to view the related assets.
3. In the search bar, enter the search criteria. For example, Description, code, status and so on.
4. Click the **Show related assets**

   button

   .

   The related main assets and the subassets are displayed.
5. Click and open the main asset to view the subassets.

Deep copying assets

The process of copying an asset together with its associated items is known as *deep copying*.

When deep copying, associated items can optionally be included or excluded, such as:

- subassets
- standard service plans
- maintenance checklist items

You can also specify how many deep copies you want to make. This is especially useful if you are required to enter the same data multiple times.

> You can deep copy assets with a **Disposed** status. However, archived assets cannot be deep copied.

You can deep copy assets, using the following procedure:

Procedure

1. At the **Assets** selection level, select the asset you want to deep copy.
2. On the action panel, click **Deep copy asset**.

   The **Copying [...]** dialog box is displayed.

3. In the **Property** field, select a property to which the asset should be copied.
4. In the **Number of copies** field, type the required number of deep copies.
5. Specify which items associated with the selected asset you want to copy by selecting the relevant checkboxes in the dialog box.
6. Click **OK**.

   The specified number of deep copies is made, with each copy including the selected items.

> A deep copy does not include existing asset locations. However, a new asset location is automatically created for each copied asset, which only specifies the property you selected. Any other relevant asset location data must be entered manually.

Deep copying building elements

The process of copying an element together with its associated items is known as *deep copying*.

When deep copying a building element, associated items can optionally be included or excluded, such as:

- sub-building elements
- standard service plans

You can also specify the number of deep copies you want to make. This is especially useful if you are required to enter the same data multiple times.

> You can deep copy building elements with a **Disposed** status. However, archived building elements cannot be deep copied.

You can deep copy building elements, using the following procedure:

Procedure

1. At the **Assets** selection level, select the building element you want to deep copy.
2. On the action panel, click **Deep copy building element**.

   The **Copying [...]** dialog box is displayed.

3. In the **Property** field, select a property to which the building element should be copied.

4. In the **Number of copies** field, type the required number of deep copies.

5. Select the check boxes of the associated items that you want to copy along with the selected building element.

6. Click **OK**.

   The specified number of deep copies is made, including the selected items in each copy.

Assigning locations to assets

You can assign locations to assets, or in other words, register the property and space where the various assets are located. If the asset is a *multiple* asset, it is possible to assign multiple locations.

Procedure

1. Go to the **Assets** selection level.
2. Select a relevant asset.
3. Go to **Asset details** > **Asset locations**.
4. Complete the relevant fields in the data section.
5. For a description of these fields, refer to Asset location data fields.
6. Click **Save**.

> For general information on adding, modifying or deleting Essentials Edition elements such as locations, refer to *Fundamentals*.

Generating QR codes for assets

In Essentials Edition , it is possible to generate **QR codes** for one or more assets, which can be scanned by Planon mobile apps. You can scan QR codes with your mobile app to:

- Report an incident for an asset

- Check any open incidents on that asset

> The **Generate QR code** option is located on the **Assets** action panel and will be available only when an asset is selected.

Procedure

1. Go to the **Assets** selection level.
2. From the list of assets, select one or more assets for which you want to generate a QR code.

   If you select multiple items, you will generate an equal number of QR codes.

3. Click on the **Generate QR code** button. The following screen appears:
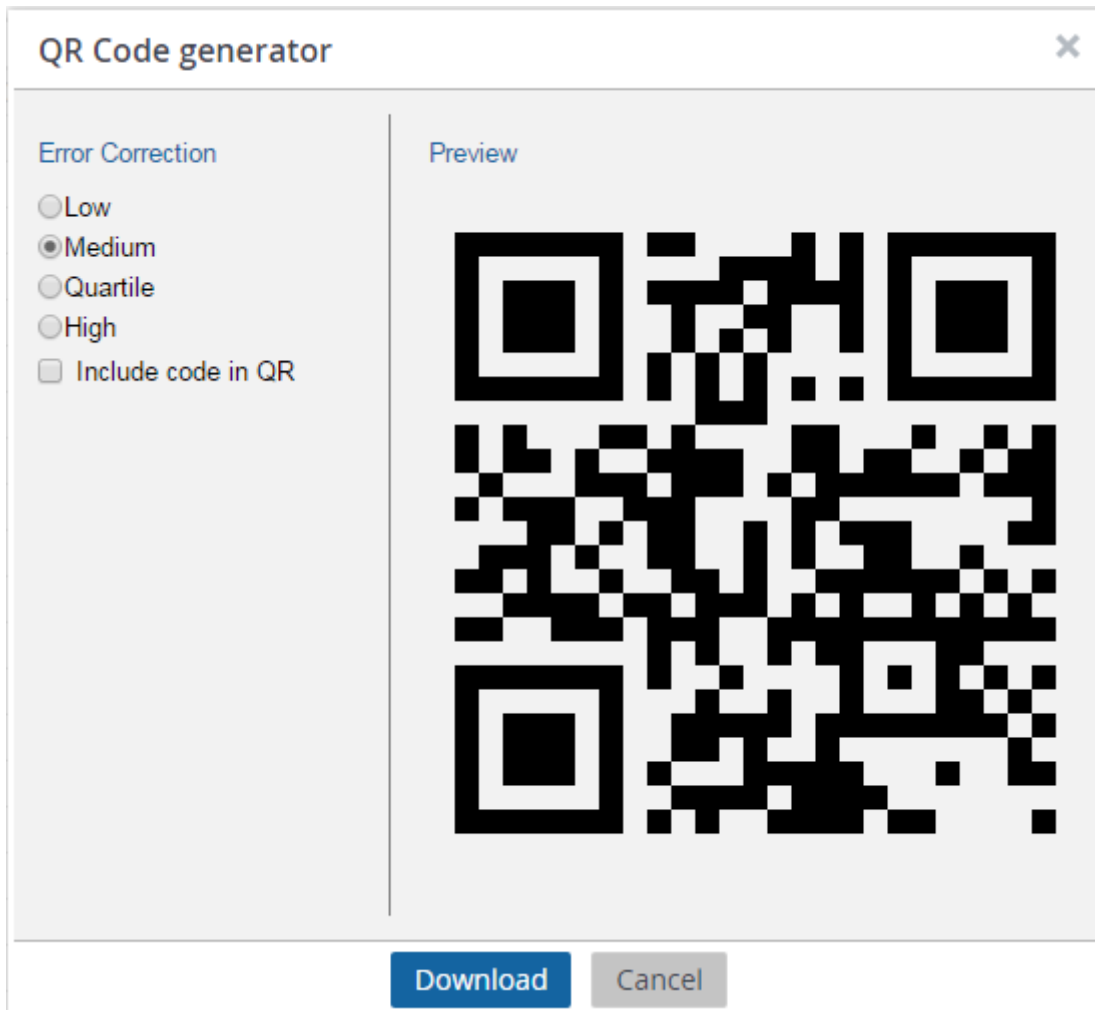
> ⚠️ The image size is set to Extra-Large by default.

4. Set the **Error correction** level to Low, Medium, Quartile or High. The error correction level of the QR code depends on what level you select.

> 💡 It is recommended to select **Medium**. Codes generated in the medium level can be scanned faster by the apps and are good for office environments.
> If there is a need to create QR codes for industrial places, select the **High** error correction level. Codes with a **High** correction level can be scanned even if they are partly covered. The scanning however, will be slower.

5. Select the **Include code in QR** option if you want to include the code in the image. Select this option only if it is necessary, as the code will be included anyway in the image's file name.

> It is recommended to uncheck the **Include code in QR** option, as the dimensions of the image will be disturbed when the code number is included.

6. Click on the **Download** option to generate the QR code.

   A folder named *QRcodes.zip* is downloaded in the download file. Extract the files from the *.zip* file to view the generated codes.

> The generated codes are stored in *.png* extension format and are transparent. You cannot choose a different file extension.

A generated QR code looks like this:

Adding / viewing communication logs

In Essentials Edition you can add or view all relevant communications regarding the selected asset or building element, in the form of communication logs. You can do this at **Asset details** > **Communication logs**.

> For more information on communication logs or for field descriptions, refer to *Fundamentals*.

Changing an asset's or a building element's status

Various statuses can be assigned to assets and building elements. The available status transitions depend on the current asset status. Every newly added asset is automatically assigned the **Ordered** status. Every newly added M&E asset or building element is automatically assigned the **In use** status. Only assets / building elements with the **Disposed** status can be transferred to the archive. To change an asset's or building element's status, proceed as follows:

Procedure

1. On the **Assets** selection level, click the asset(s)/ building element(s) whose status you want to change.

> To change the status of several assets/building elements simultaneously, use **Action on selection**.

> For details on using **Action on selection**, refer to *Fundamentals*.

2. On the **Status transitions** action panel, click the required status.

   The status is changed.

   Changing the status to **Disposed of** has consequences for any associated maintenance activity definitions. They are either:

   ◦ Deleted, if no maintenance orders have been generated yet.

   ◦ Updated, if maintenance orders have already been generated. The maintenance activity definition's end date-time will be brought forward to the end date-time of the last generated order.

> For more details, refer to *Planned Maintenance* .

Reporting in Technical assets

Essentials Edition includes a tool that is used to create, edit and print reports: **Reports** . With the appropriate authorization, you can access **Reports** from within all action panels in Technical assets . If you click **Report** on the action panel, the **Reporting** dialog box appears. This dialog box always includes a **User reports** tab. On the **Assets** selection level, it also includes a **System reports** tab.

The **User reports** tab provides access to functionality to create your own report definitions.

> ℹ️ For details on creating user report definitions, see *Reports* .

The **System reports** tab in the **Reporting** dialog box provides access to system reports that are pre-programmed for Technical assets . Here, you can also make settings regarding the presentation and output of the system report. Report settings for the configuration of these system reports can be made by administrators in *Field definer* , where **Report settings** business objects are available per system report.

The following system reports are available on the **Assets** selection level:

- **Asset location differences**: this report is available for the **Base Asset** business object. It is a *verification* report. If this report contains data (assets), this means that the location details on the **Asset locations** selection level differ from the location details entered on the maintenance activity definition. You may have linked the wrong property or space to the maintenance activity definition.

- **Assets without activities**: this report lists per property which assets have no linked service plans and maintenance activities.

Using system reports

There are several predefined system reports available in Asset Management on the **Assets** selection step. The following procedure is an example of how you can open and preview a system report on assets.

Procedure

1. Go to **Assets** and select the asset(s) that you want to include in the system report.
2. On the action panel, click **Report**.

   The **Reporting** window opens.

3. Click the **System reports** tab.

   Predefined system reports are displayed. You cannot modify a system report's design, but you can make several settings concerning the presentation and output of a system report.

> ℹ️ The **User reports** tab gives access to functionality with which you can create your own report definitions. For more information on creating user report definitions, see *Report Manager*.

4. Select the relevant system report.
5. Select relevant output options for your system report:

- ◦ **Preview & print**: enables you to preview and print a version of your report.
- ◦ **Export report**: enables you to select an export format. You can choose between the PDF, HTML, CSV formats and three different XLS formats;

Asset library

In the **Asset library**, you can add, copy, delete or archive *standard assets* and *standard building elements*. Basically, these are 'template' assets and 'template' building elements that you can use to speed up the process of adding new assets or building elements in the Assets and/ or Technical assets TSI. If users add an asset or building element that is based on a standard asset or standard building element, many fields are automatically populated that would otherwise have to be populated manually.

More importantly, the standards from the **Asset library** are very useful in maintenance planning. Standard assets and standard building elements speed up data entry in TSIs like **Planned Maintenance** .

> 💡 In **Asset Library**, you can search by code for standard assets and standard building elements by using the magnifying glass icon at the top right of your screen or simultaneously pressing *CTRL +<space>*.

Adding a standard asset to the Asset Library

Proceed as follows to add a standard asset to the Asset library.

Procedure

1. In the Navigation Panel , select Asset library.
2. At **Maintenance Libraries**, select the maintenance library to which you want to add a standard asset.
3. If relevant, select one of the filters available at **Filters**.
4. Select **Standard assets**.
5. On the action panel, select **Add standard technical assets**.
6. Complete the relevant fields on the data panel.

   For more information on the function of the available fields, refer to Asset data fields.

7. Click **Save** to save your standard asset data.

   If relevant, you can add:

   ◦ standard subassets via the **Add sub (standard asset)** action on the action panel.

Adding a standard building element to the Asset Library

Proceed as follows to add a standard building element to the Asset library.

Procedure

1. In the Navigation Panel , select Supporting data > Asset library.
2. At **Maintenance libraries**, select the maintenance library to which you want to add a standard building element.
3. If relevant, select one of the filters at **Filters**.
4. Select **Standard assets**.

5. On the action panel, select **Add - Standard building elements**.
6. Complete the relevant fields on the data panel.

   For more information on the function of the available fields, refer to Asset data fields.

7. Click **Save** to save your standard building element data.

   If relevant, you can add:

   ◦ standard sub-building elements via the **Add sub (standard building element)** action on the action panel.

Linking standard service plans to a standard asset or a standard building element

Proceed as follows to link standard service plans to a standard asset or standard building element in the **Asset library**.

Procedure

1. Start Technical assets > Asset Library and go to **Standard assets**, where you can link one or more standard service plans to a standard asset or standard building element.
2. On the **Links** action panel, click **Link standard service plans**.

   The **Link standard service plans** dialog box appears.

   In **Available**, select the standard service plans you want to link to the selected asset / building element.

> 💡 If a large number of standard service plans is shown in **Available**, you apply a search filter to only display those service plans belonging to a specified technical classification, classification group or asset classification.

3. Move the relevant standard service plans to **In use**.
4. Click **OK**.

   The standard service plans are linked to the selected standard asset or standard building element.

Viewing linked standard service plans and linked standard activity definitions

In the **Asset library**, you can view the standard service plans and standard activity definitions that are linked to standard assets or standard building elements. Proceed as follows to view a standard service plan for a selected standard asset / building element:

Procedure

1. At **Standard assets**, select the standard asset(s) or standard building element(s) whose standard service plans you want to view.
2. Select **Standard asset details.**

At the **Standard service plans** selection step you can view the standard service plans that were linked to the selected standard asset/standard building element at **Standard assets**.

At the **Standard activity definitions** selection step you can view the standard activity definitions that are linked to the selected standard asset/standard building element.

Asset Maintenance

Preparing assets for maintenance and condition surveys

You can prepare assets / building elements for maintenance by:

- Linking a standard service plan from the **Maintenance Manager** > **Maintenance Library** to a selected asset/building element at **Assets**.

> 💡 The actual maintenance planning takes place in **Maintenance Manager** > **Maintenance Planner**, where maintenance plans are created. The work (maintenance orders) ensuing from maintenance plans is monitored and completed in Work Orders .

Linking standard service plans to an asset or building element

Procedure

1. At the **Assets** selection level, select the asset / building element to which you want to link standard service plans.
2. In the **Links** action panel, click **Link standard service plans**.
   The **Link standard service plans** dialog box appears.
   In **Available**, select the standard service plan(s) you want to link to the selected asset/building element.

> 💡 If a large number of standard service plans is shown in **Available**, you can locate the relevant standard service plans more efficiently by filtering on a specific technical classification, classification group or asset classification.

3. Click the right arrow button to transfer the selected standard service plans to **In use**.
4. Click **OK**.
   The standard service plans are now linked to the selected asset / building element.

Manually adding condition data

You can add data about an asset's or a building element's condition at **Asset details** > **Condition data**.

Procedure

1. On the **Asset** > **Conditions** action menu, click **Add**.
2. In the data section, complete the relevant fields.
   For more information, refer to Condition data fields.

3. Click **Save**.

    You can now proceed to add condition details to the condition data, at **Activities/registrations** > **Condition details**.

🔆   Adding condition assets is only possible in Technical assets TSI.

Manually adding condition details

You can manually add detailed information to an asset's or building element's condition data at **Activities/registrations** > **Condition details**.

Procedure

1. At **Condition data**, select the condition data to which you want to add condition details.
2. Descend to **Activities/registrations** > **Condition details.**
3. At **Condition details**, click **Add asset condition details – manually** on the action menu.
4. In the data section, complete the relevant fields.

    For more information, refer to Condition details fields.
5. Click **Save**.

CAD Integrator in Technical assets

In Technical assets , you can start CAD Integrator by clicking the CAD Integrator button, to display a selected asset graphically in a converted AutoCAD drawing.

To start CAD Integrator in Technical assets while simultaneously opening a relevant CAD drawing, the following conditions have to be met:

- in Spaces & Workspaces an *.orj drawing is linked to the floor that holds the space that is also present in the location assignment of the asset (refer to **Asset details** > **Location assignments**);

- in Technical assets , only one asset with a fully specified asset location is selected in the elements list. The CAD Integrator drawing that has been linked to the floor of this asset's space is displayed as soon as you start CAD Integrator .

> If multiple assets are selected, CAD Integrator starts with an empty pane. If an asset is selected whose asset location is unspecified, the **Select a floor drawing** dialog box is displayed. Select a relevant drawing from the list to start CAD Integrator .

When you select a space in CAD Integrator, the assets linked to it will be highlighted in the elements list.

After you have opened CAD Integrator for a selected asset, you can link/unlink, highlight, reposition, rotate and copy asset symbols in the drawing, and synchronize updates in the drawing with data in the Essentials Edition database.

> For more information on working with floors, spaces and assets in CAD Integrator , refer to CAD Integrator .

Graphical viewer in Technical assets

The Graphical viewer provides a graphical representation of assets/configuration items(CI) and services and the relations between them.

The Graphical viewer displays the following relations for a selected asset/CI or (SLA) service:

For a selected CI:

- Main CI / Sub CI
- Parent CI / Dependent CI
- Related CI
- Linked SLA service

For a selected SLA service:

- Main service / Sub service
- Linked CI
- Linked service

> 💡 For the **Related asset** type, you have to first define the **Asset relation type** in Supporting data .

Technical assets – Field Descriptions

Asset group fields

The read-only data, which is derived from the Supporting data launch group, is available for asset groups. For a description of these fields, refer to the following table.

Field	Description
Classification code	This field displays the group's classification code. For example: the **Furniture** group with classification code 23.
Classification group	This field displays the full code of the classification group. For example: the **Furniture** group (classification code 23) contains the **Cabinets** subgroup (classification code 15), which contains the **Filing cabinets** group (classification code 09). In the **Classification group** field you will find the value 23.15.09 for the group.
Name	This field displays the group's name.

Asset fields

Field	Description
Asset group	Select the code and the description of the asset group to which an asset belongs. If you have selected an asset group at the **Components** selection level, the field is automatically populated.
Asset classification	Enter the relevant asset classification from a dialog box containing the methods defined in Supporting data .
Age of asset	This read-only field displays the age of the asset. The value in this field is the difference in months between the current date and the **Date of manufacture**.
Attribute set	If attributes have been configured, this field displays detailed, additional information that is specific to the selected asset.
Brand	Enter the brand of the asset.
Cost center	Select a relevant cost center for the asset.
Code	Displays the generated asset ID code. ID codes can be generated automatically. It depends on your Essentials Edition settings whether an ID code is generated or must be entered manually.
Description	Enter a relevant description for the asset.

Field	Description
Date first used	Enter the date on which the selected asset was first used.
Date of manufacture or construction	Enter the date on which the asset was manufactured.
Energy label	Select a relevant energy label from the **Energy label** dialog box that is available in this field. Energy labels are maintained and added in Supporting data .
Entry date	This field is automatically populated with the date on which the selected asset is added in Essentials Edition .
Expected economic end date	Enter the asset's expected economic end date. This is the asset's end date based on economic devaluation of the asset. For example, if a computer is devaluated after three years, it is of no economic value after three years.
Expected technical end date	Enter the asset's expected technical end date. This is the asset's end date based on its technical specification.
Expected economic life span	This read-only field displays the expected economic life span in months. The value in this field is the difference in months between the **Expected economic** > **end date** and the **Date of manufacture**.
Expected technical life span	This read-only field displays the expected technical life span in months. The value in this field is the difference in months between the **Expected technical end date** and the **Date of manufacture**.
Is planned maintenance required? (Y/N)	Indicate whether or not you want to include this asset into maintenance plans in **Maintenance Planner**. This field must be set to **Yes**, to enable the asset for planned preventive maintenance.
Location assignment	This field displays read-only data on the location that has been assigned to the selected asset. For more information on asset location, refer to Assigning locations to assets.
Latest survey date	This read-only field displays the latest survey date for the selected asset or building element.
Latest condition score	This read-only field displays the aggregated condition score of the existing asset or building element corresponding to the latest survey.
Latest quantity	This read-only field displays the total number of assets or building elements corresponding to the latest survey date.
Main asset	If an asset is a sub asset, use this field to specify the ID code and a description of the main asset. This field enables you to add a sub asset to another main asset, by selecting one from the pick list.
Maintenance start date	Enter the date on which maintenance of the asset starts. This date is taken into account when compiling maintenance

Field	Description
	plans in **Maintenance Planner**. No maintenance activities are generated before this date.

> 💡 In contract service plans, the asset's **Maintenance start date** is also applied, even if this start date is earlier than the start date of the corresponding contract line. The associated activity definition is planned from this maintenance start date, according to the specified frequency.

Field	Description
Maintenance end date	Enter the date on which maintenance of the asset ends. This date is taken into account when compiling maintenance plans in **Maintenance Planner**. No maintenance activities are generated after this date.
Manufacturer	Enter the name of the asset's manufacturer.
Missing	Use this yes/no field to specify whether the asset is missing or not.
Of person	If applicable, select the person who owns the asset. This list contains people from the Personnel TSI.
Of department	Select the department that owns the asset. It is recommended to use either the **Of person** or the **Of department** field, not both, since the use of both fields increases the chance of errors.
Photo	Open a photo of the selected asset.
Quantity	Specify a quantity for the asset building element. For the building elements this quantity is updated whenever the quantity in the **Activities/registrations** > **Condition data** is modified due to a condition survey.

> ⚠ When you create asset condition data on a simple asset, the quantity should always be 1.

Field	Description
Remaining economic life span	This read-only field displays the remaining economic life span in months. The value in this field is the difference in months between the **Expected economic** > **end date** and the current date.
Remaining technical life span	This read-only field displays the remaining technical life span in months. The value in this field is the difference in months between the **Expected technical end date** and the current date.

Field	Description
Simple	Use this **Yes / No** field to specify whether or not the selected asset is a simple asset, which means it consists of one single asset. If you select **No**, it means that the asset is a multiple asset.
Supplier	Select the supplier of the asset. This list includes addresses from the Addresses TSI.
Service company	Select the company that services the asset. This list contains addresses from the Addresses TSI.
Trade	Link a trade to the asset, so that the appropriate tradesperson can attend to it. The trade selected here is also auto-populated on orders and maintenance activity definitions that are related to the asset.
Unit	Enter the unit to calculate the quantity of the asset with. For example pieces, yards, dozen etc.

> ⚠️ This field is not visible by default. The Planon administrator can make it visible in TSIs . If you use asset service plans and asset activity definitions this field must be populated.

Warranty expires on	Enter the date on which the corresponding warranty expires.

Asset and building element statuses

Status	Description
Ordered	Each newly added asset element is assigned this status automatically.
In use	From the moment an asset/building element is used, set its status to **In use**.
Idle	If an asset/building element is currently not in use, set its status to **Idle**.
Being repaired	If an asset is in reparation, set its status to being repaired. This status does not affect any functionality.
Disposed	If an asset/building element is no longer of importance in Essentials Edition , for example because you have sold it, set its status to **Disposed**.

Asset location fields

Field	Description
Date	Select a date as per which the asset location should take effect.
Property	Select the property where the asset(s) is/are located.
Space	Select the space where the asset(s) is/are located.
Quantity	In case of a multiple asset, enter the number of items that are present at the selected location.

Condition data fields

Field	Description
Asset/building element	Enter the relevant asset or building element whose condition data are added.
Survey date	Enter the date on which the condition of the selected asset or building element is observed.

> ⚠️ After clicking **Save**, you cannot modify this value anymore!

Aggregated condition score	Displays the weighted average taken from the sum of observed conditions that are available at **Condition details** for a selected asset or building element.

Example

Building element = brick wall.

Total quantity (m2) = 90

10 m2 of the wall is in observed condition 2

70 m2 of the wall is in observed condition 1

10 m2 of the wall is in observed condition 4.

The wall's **Aggregated condition score** is calculated according to this formula:

((10*2) + (70*1) + (10*4)) / 90 = 1.44

> 💡 If the asset condition details are added or deleted, the aggregated condition score is recalculated based on the most recent **Asset condition detail update** date of the remaining Asset condition details.

Code	Enter a code for the condition data.

Field	Description
Description	Enter a description of the condition data.
Total quantity	This calculated, read-only field displays the sum of the quantities available for a selected asset/building element at **Condition details**.

Condition details fields

Field	Description
Asset condition	Enter the relevant asset condition to which you want to add details.
Unit of measurement	Select the relevant unit of measurement from the dialog box available in this field. The value entered in this field refers to the value in the **Quantity** field.
Quantity	Enter the relevant quantity that applies to the building element. Whenever the quantity in this field is modified, the **Quantity** field on the building element in the **Assets** level and the **Total quantity** field in the **Asset details** level are updated. 💡 The value entered in this field refers to the value in the **Unit of measurement** field.
Comment	If relevant, enter a comment on the condition details.
Condition score	Displays the latest condition score of the asset. This is the latest surveyed score. Only the asset condition with the latest survey date is considered in the rest of Essentials Edition , even if the latest update date is higher on an older asset condition.
Latest condition update date-time	Displays the date of completion of a maintenance activity on a condition detail.

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