

# Training guide:

## Asset Management





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North Time Pro

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# Contents

## Course

## Duration

**tw21/op/ast001**

Approximately 15 minutes

### **An introduction to asset management**

Adding North Time Pro asset management records...

Module	Description
m/12/101	Understanding asset management
m/12/110	Adding an asset
m/12/120	General
m/12/130	Ownership
m/12/140	Service agreement
m/12/150	Inspection

All information pertaining to any personnel record within this document is obtained from a demonstration database and are not details of any individual.



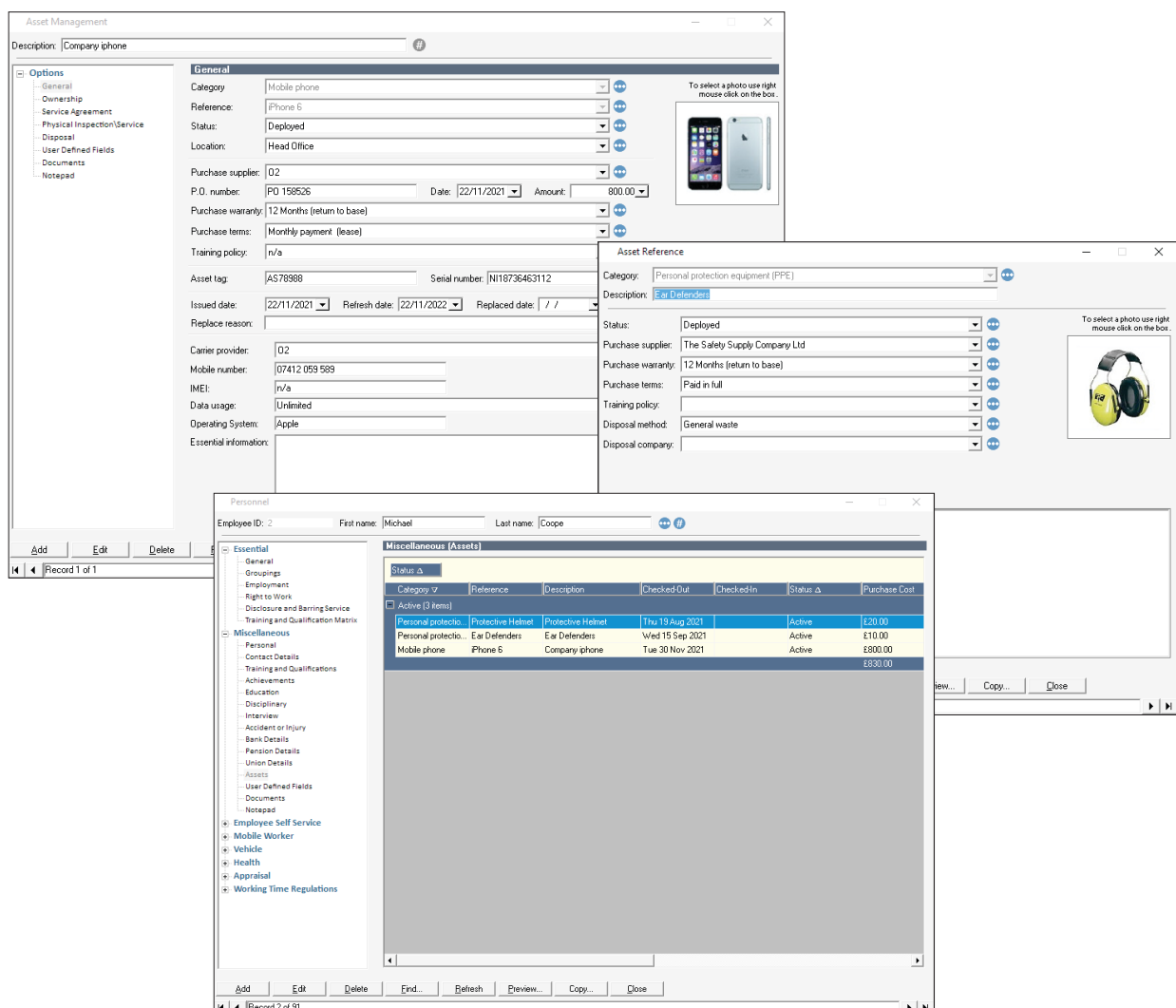
## Module:

m/12/101

## Understanding asset management

The North Time Pro asset management module allows you to keep track of 'things of value' to your company. These things may be as diverse as work boots, laptops, mobile phones and fork-lift trucks!

Designed initially to provide a method of keeping track of personal protection equipment, the module has rapidly expanded to include other items including mobile phones and IT equipment. The module is not just limited to personal items. It has been developed to include tangible assets such as company vehicles, fork-lift trucks and even items such as boilers and air-conditioning units. The module allows you to store maintenance records and even asset disposal information.



The screenshot displays the 'Asset Management' software interface. The main window shows a form for managing assets, with a sidebar on the left containing a tree view of options like General, Ownership, Service Agreement, Physical Inspection/Service, Disposal, User Defined Fields, Documents, and Notepad. The main form is divided into sections: General, Asset Reference, and Personnel. The General section includes fields for Category (Mobile phone), Reference (iPhone 6), Status (Deployed), Location (Head Office), Purchase supplier (02), P.O. number (PD 158526), Date (22/11/2021), Amount (800.00), Purchase warranty (12 Months (return to base)), Purchase terms (Monthly payment (lease)), Training policy (n/a), Asset tag (AS78988), Serial number (N18736463112), Issued date (22/11/2021), Refresh date (22/11/2022), Replaced date ( / / ), Replace reason, Carrier provider (02), Mobile number (07412 059 589), IMEI (n/a), Data usage (Unlimited), Operating System (Apple), and Essential information. The Asset Reference section includes fields for Category (Personal protection equipment (PPE)), Description (Ear Defenders), Status (Deployed), Purchase supplier (The Safety Supply Company Ltd), Purchase warranty (12 Months (return to base)), Purchase terms (Paid in full), Training policy, Disposal method (General waste), and Disposal company. The Personnel section shows a table of assets with columns for Status, Category, Reference, Description, Checked Out, Checked In, Status, and Purchase Cost. The table lists three items: Personal protection (Protective Helmet), Personal protection (Ear Defenders), and Mobile phone (iPhone 6). The Personnel window also shows a list of personnel with columns for Employee ID, First name, and Last name. The Personnel window is currently displaying the details for Michael Coope.

Status	Category	Reference	Description	Checked Out	Checked In	Status	Purchase Cost
Active (3 items)							
Active	Personal protection	Protective Helmet	Protective Helmet	Thu 19 Aug 2021		Active	£20.00
Active	Personal protection	Ear Defenders	Ear Defenders	Wed 15 Sep 2021		Active	£10.00
Active	Mobile phone	iPhone 6	Company iphone	Tue 30 Nov 2021		Active	£800.00
							£830.00



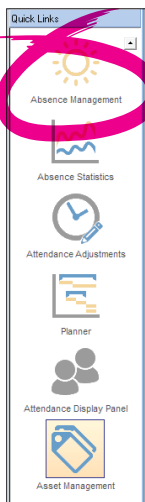


## Module:

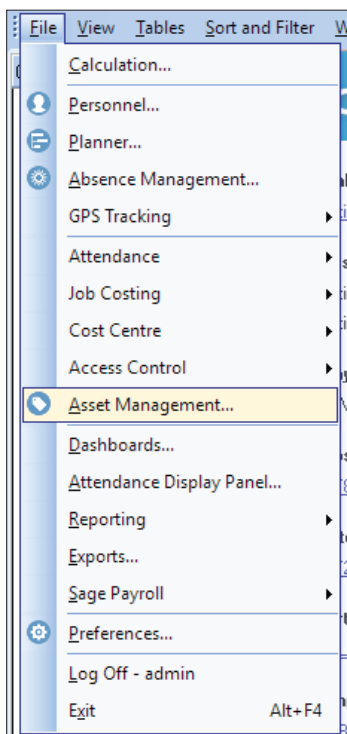
m/12/110

### Adding an asset

1. To access the North Time Pro Asset Management, select the Asset Management Quick Link,



Or, select File, then Asset Management...



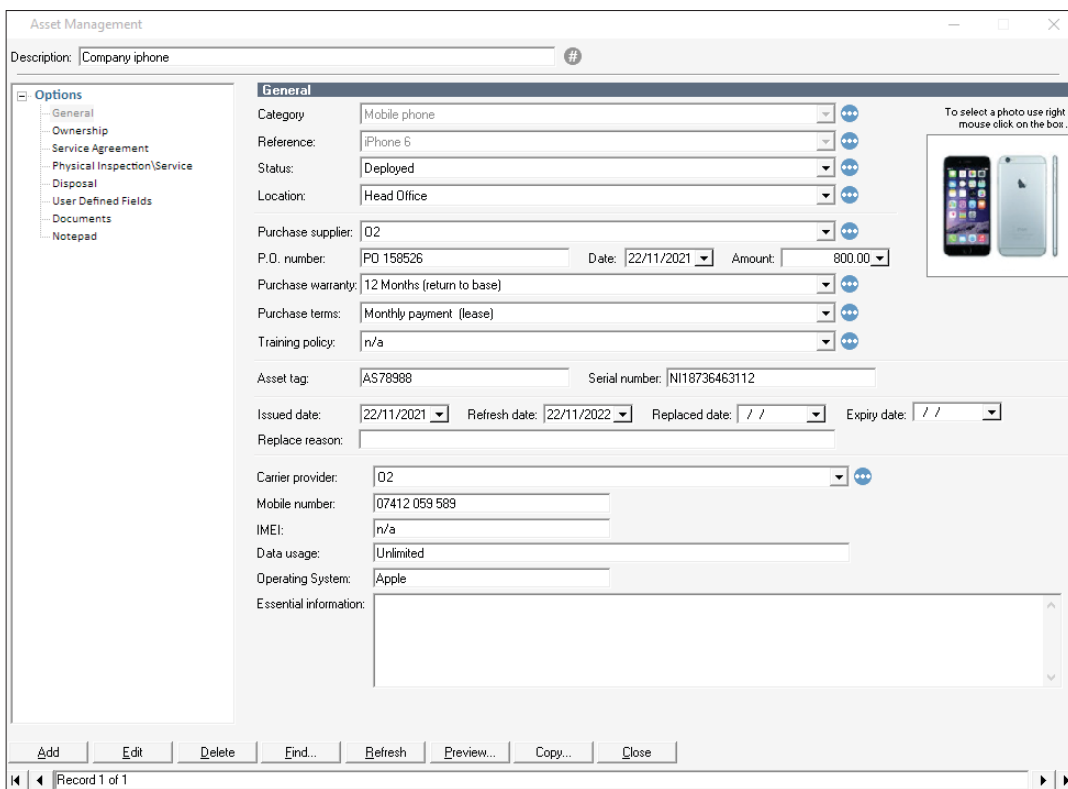
2. The Asset Management Screen will appear at the last viewed Asset.

Press <Add> to add a new North Time Pro asset record. All the fields will turn blue, and will be ready for you to enter asset details. We'll cover the information you need to input in the sections to follow.

## Module:

### m/12/120 General

The general section of the Asset Management module contains information vital to the Asset itself. These are things such as if the Asset has been deployed, it's warranty details and any training requirements for the Asset to list a few. For this example, we will use a mobile phone.



The screenshot shows the 'Asset Management' window with the 'General' tab selected. The 'Description' field is set to 'Company iphone'. The left sidebar shows 'Options' with 'General' selected. The main form contains the following fields:

- Category:** Mobile phone
- Reference:** iPhone 6
- Status:** Deployed
- Location:** Head Office
- Purchase supplier:** 02
- P.O. number:** PO 158526
- Date:** 22/11/2021
- Amount:** 800.00
- Purchase warranty:** 12 Months (return to base)
- Purchase terms:** Monthly payment (lease)
- Training policy:** n/a
- Asset tag:** AS78988
- Serial number:** NI18736463112
- Issued date:** 22/11/2021
- Refresh date:** 22/11/2022
- Replaced date:** / /
- Expiry date:** / /
- Replace reason:** (empty field)
- Carrier provider:** 02
- Mobile number:** 07412 059 589
- IMEI:** n/a
- Data usage:** Unlimited
- Operating System:** Apple
- Essential information:** (empty text area)

At the bottom, there are buttons for 'Add', 'Edit', 'Delete', 'Find...', 'Refresh', 'Preview...', 'Copy...', and 'Close'. The status bar at the bottom indicates 'Record 1 of 1'.

1. Select the category which will contain an option for the type of asset this will be. In this instance, a mobile phone.

The screenshot shows the 'Asset Management' application window. The 'Description' field is set to 'Company iPhone'. The 'Options' sidebar on the left lists various categories, with 'General' selected. The 'General' tab displays the following fields:

- Category: Mobile phone
- Reference: iPhone 6
- Status: Deployed
- Location: Head Office
- Purchase supplier: 02
- P.O. number: PO 158526
- Date: 22/11/2021
- Amount: 800.00
- Purchase warranty: 12 Months (return to base)
- Purchase terms: Monthly payment (lease)
- Training policy: n/a
- Asset tag: AS78988
- Serial number: NI18736463112
- Issued date: 22/11/2021
- Refresh date: 22/11/2022
- Replaced date: / /
- Expiry date: / /
- Replace reason:
- Carrier provider: 02
- Mobile number: 07412 059 589
- IMEI: n/a
- Data usage: Unlimited
- Operating System: Apple
- Essential information:

At the bottom of the window, there are buttons for 'Add', 'Edit', 'Delete', 'Find...', 'Refresh', 'Preview...', 'Copy...', and 'Close'. The status bar at the very bottom indicates 'Record 1 of 1'.

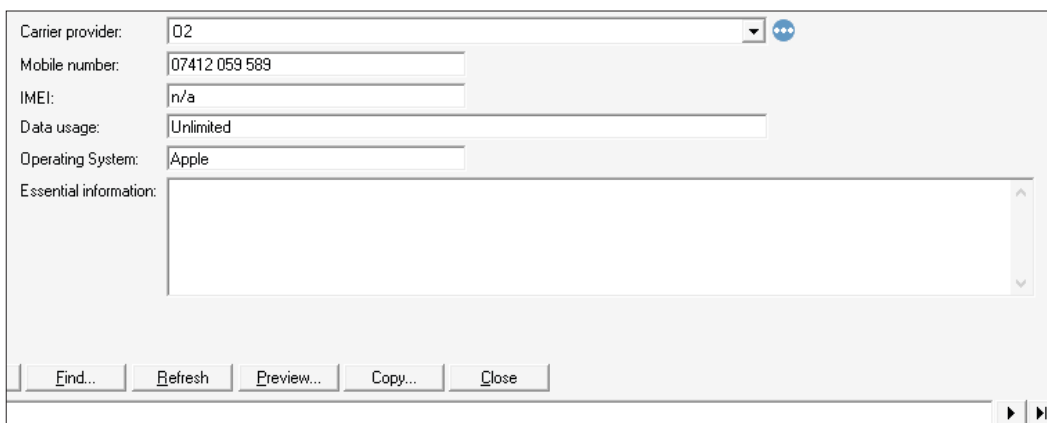
2. Select the asset reference. Depending on your configuration, the asset reference may or may not automatically fill out certain fields within the general section. The reference is designed to save time when you are inputting multiple assets by automatically filling out certain fields.

3. The only extra mandatory fields you will need to fill in within this screen:

- Status
- Training policy

Other fields are optional and at your discretion.

4. Depending on the category, the bottom half of the page will be different i.e. a mobile phone won't need a clothing size option. These are optional.



The screenshot shows a web form for entering mobile device information. The fields are as follows:

Carrier provider:	02
Mobile number:	07412 059 589
IMEI:	n/a
Data usage:	Unlimited
Operating System:	Apple
Essential information:	

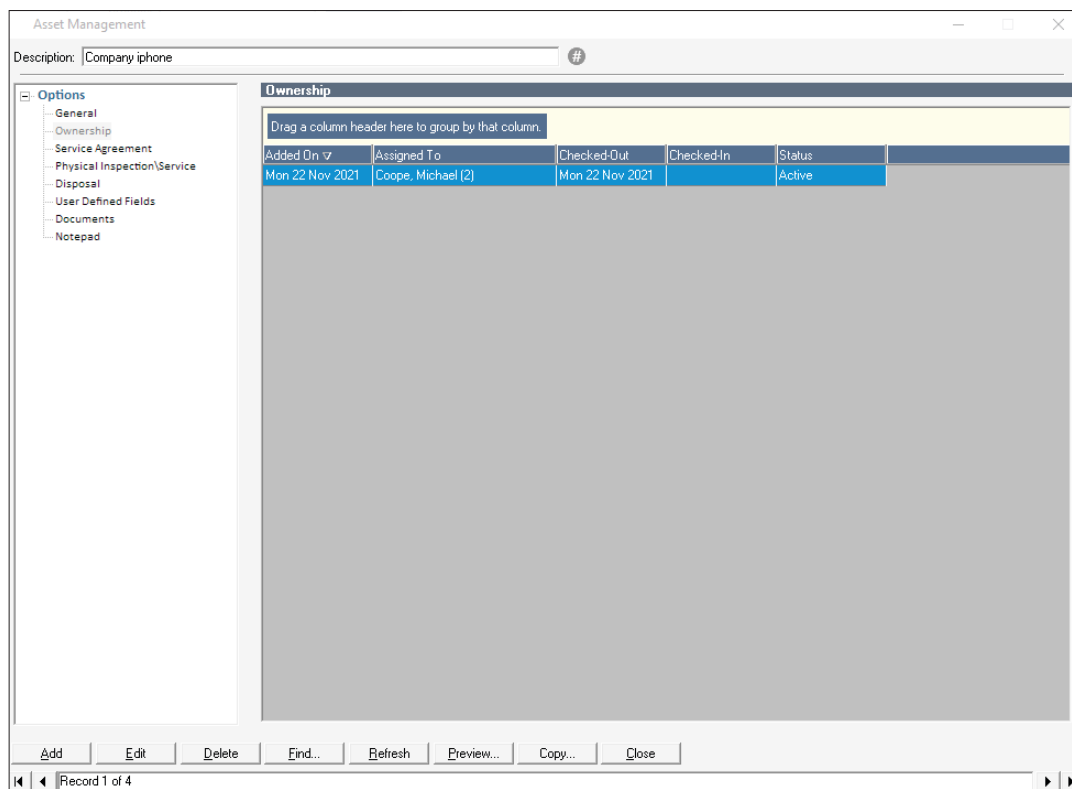
At the bottom of the form, there are five buttons: Find..., Refresh, Preview..., Copy..., and Close. The form is displayed within a browser window with a scrollbar on the right.



## Module:

### m/12/130 Ownership

Ownership of assets can be given to individuals or assigned to company use. Assets that are companywide can be pieces of equipment that belong to the company as a whole i.e. a server or a boiler.

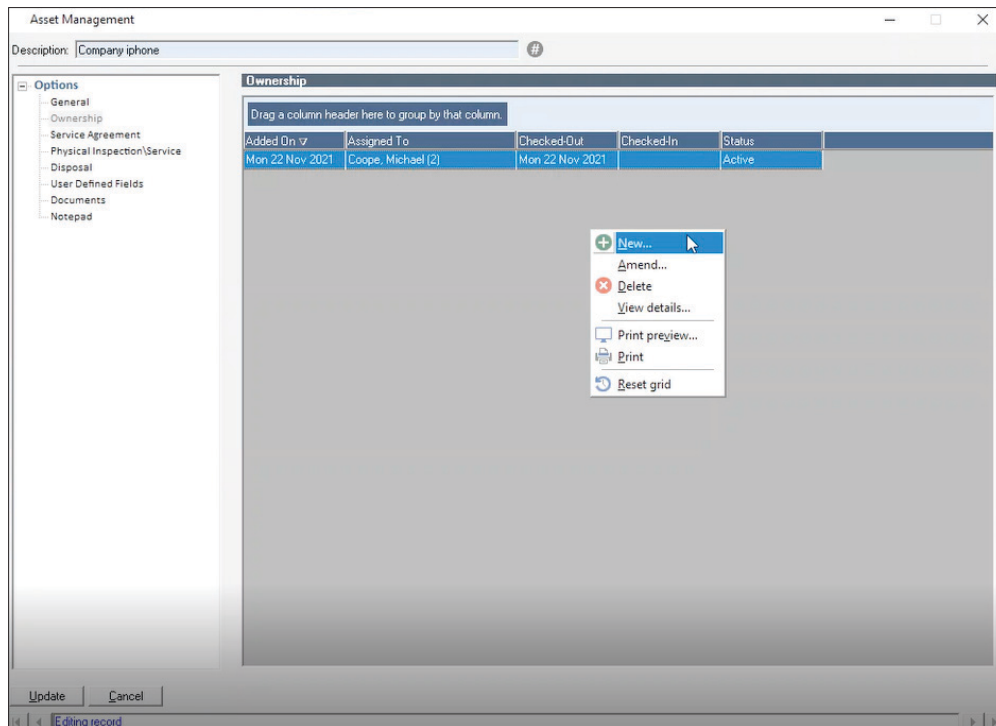


The screenshot shows the 'Asset Management' window with the 'Description' field set to 'Company iphone'. The 'Ownership' tab is selected, displaying a table with the following data:

Added On	Assigned To	Checked-Out	Checked-In	Status
Mon 22 Nov 2021	Coope, Michael (2)	Mon 22 Nov 2021		Active

The interface includes a sidebar with 'Options' (General, Ownership, Service Agreement, Physical Inspection/Service, Disposal, User Defined Fields, Documents, Notepad) and a bottom toolbar with buttons: Add, Edit, Delete, Find..., Refresh, Preview..., Copy..., and Close. The status bar at the bottom indicates 'Record 1 of 4'.

1. Select the ownership tab, then right click and press New.



2. In the new window that opens fill out the assigned to section (if an employee, select the person)

The screenshot shows the 'Asset Ownership - (New)' window. The 'Details' section contains the following fields:

- Assigned to: Person (dropdown menu)
- Status: Active (dropdown menu)
- Checked-out: Mon 22 Nov 2021 (dropdown menu)
- Checked-in: (empty dropdown menu)

On the right, the 'Select Person' section includes:

- Employee ID: (text input)
- First name: (text input)
- Last name: (text input)
- Select Person... (button)

Below the details is a large yellow rectangular area. At the bottom, there is a 'Document' section with a table header:

Description	File Name	Date and Time	File Size (MB)
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The 'Document' section is currently empty. At the bottom of the window are 'Cancel' and 'Ok' buttons.



- Once the asset has been updated the employees personnel record will show the assigned asset.

Personnel

Employee ID: 2    First name: Michael    Last name: Coope

**Essential**

- General
- Groupings
- Employment
- Right to Work
- Disclosure and Barring Service
- Training and Qualification Matrix

**Miscellaneous**

- Personal
- Contact Details
- Training and Qualifications
- Achievements
- Education
- Disciplinary
- Interview
- Accident or Injury
- Bank Details
- Pension Details
- Union Details
- Assets
- User Defined Fields
- Documents
- Notepad

**Employee Self Service**

- Mobile Worker
- Vehicle
- Health
- Appraisal
- Working Time Regulations

**Miscellaneous (Assets)**

Status: Δ

Category ▾	Reference	Description	Checked-Out	Checked-In	Status Δ	Purchase Cost
<input type="checkbox"/> Active (3 items)						
Personal protectio...	Protective Helmet	Protective Helmet	Thu 19 Aug 2021		Active	£20.00
Personal protectio...	Ear Defenders	Ear Defenders	Wed 15 Sep 2021		Active	£10.00
Mobile phone	iPhone 6	Company iphone	Tue 30 Nov 2021		Active	£800.00
						£830.00

Add    Edit    Delete    Find...    Refresh    Preview...    Copy...    Close

Record 2 of 91



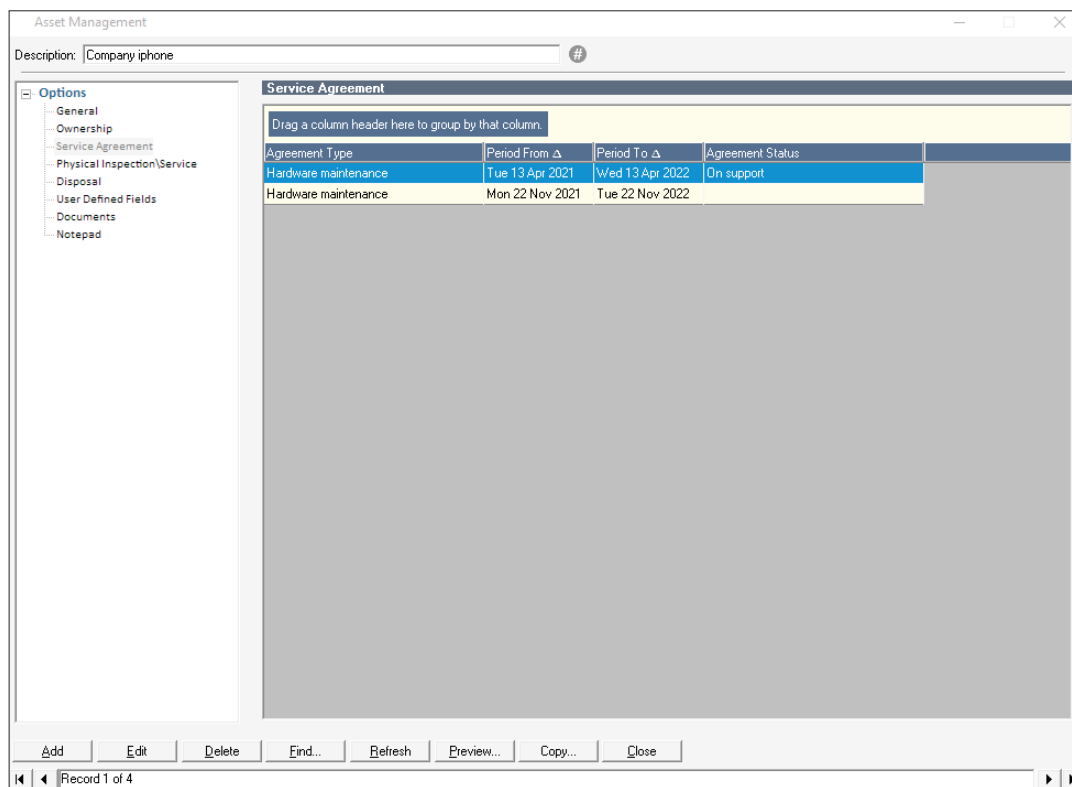
A series of horizontal lines for taking notes, spanning the width of the page.

## Module:

m/12/140

## Service agreements

The Asset Management module has the ability to store any service agreements for particular assets so that you can keep effective track of these agreements.



Asset Management

Description: Company iPhone

Options

- General
- Ownership
- Service Agreement
- Physical Inspection/Service
- Disposal
- User Defined Fields
- Documents
- Notepad

Service Agreement

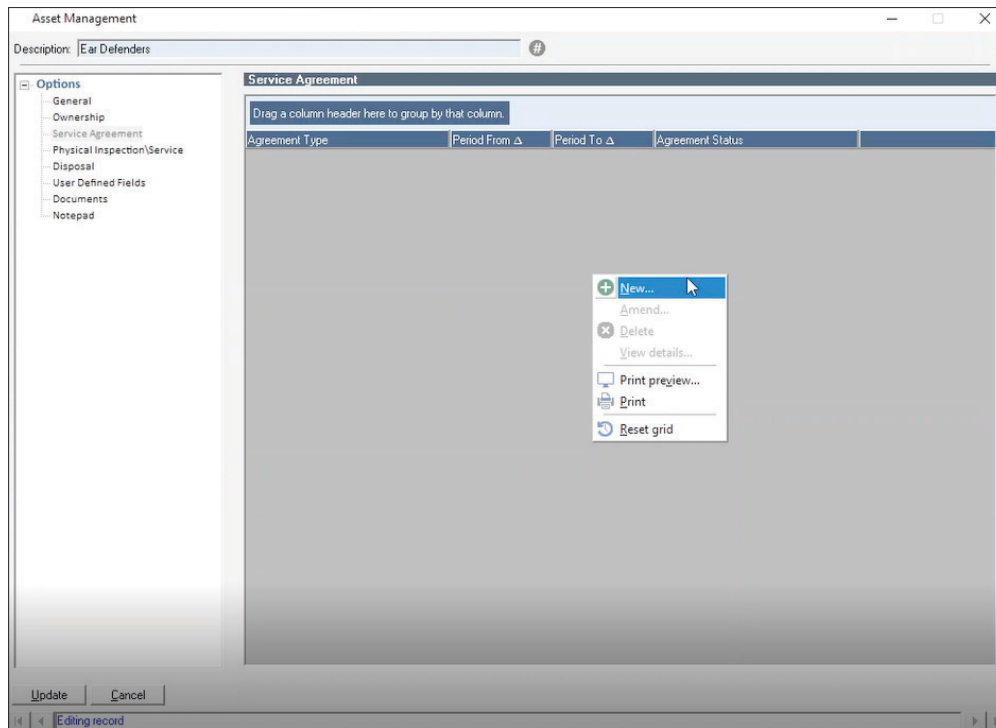
Drag a column header here to group by that column.

Agreement Type	Period From	Period To	Agreement Status
Hardware maintenance	Tue 13 Apr 2021	Wed 13 Apr 2022	On support
Hardware maintenance	Mon 22 Nov 2021	Tue 22 Nov 2022	

Add Edit Delete Find... Refresh Preview... Copy... Close

Record 1 of 4

1. Select the Service Agreements tab then right click and press new.



2. In the new window that opens fill out the fields within this section. You also have the option of adding documents to this record. To add these right click in the blank space at the bottom of the page and press new.

The screenshot shows the 'Asset Service Agreement - (New)' form. It has several sections:
 

- Details:** Agreement type (Hardware maintenance), Agreement status (On support), Period covered (Wed 15 Dec 2021 to Wed 15 Dec 2021), Auto renew, Supplier (02), P.O. number (P0224542), Purchase date (15/12/2021), and Purchase amount (100.00).
- Contact (1):** Telephone and Email fields.
- Contact (2):** Telephone and Email fields.
- Notes:** A large yellow text area.
- Document:** A table listing documents.
 

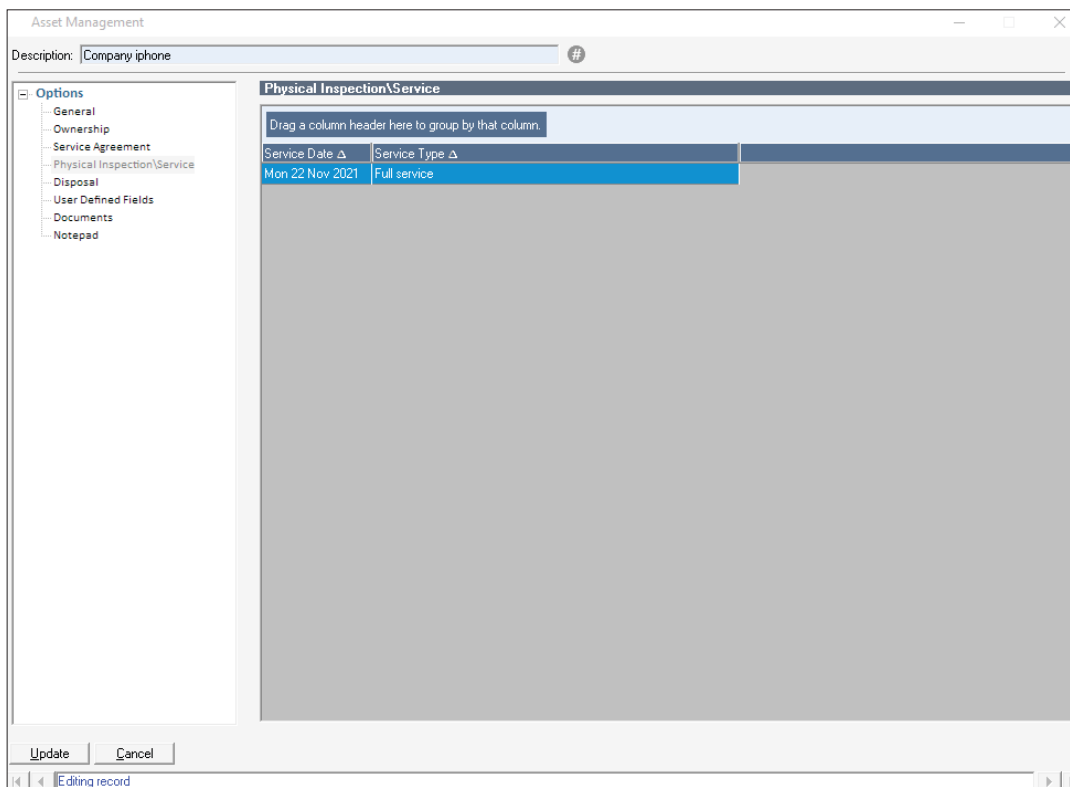
Description	File Name	Date and Time Δ	File Size (MB)
Service Agreement	New Text Document.txt	Mon 22 Nov 2021 11:11	0

 At the bottom are 'Cancel' and 'Ok' buttons.

## Module:

### m/12/150 Inspection

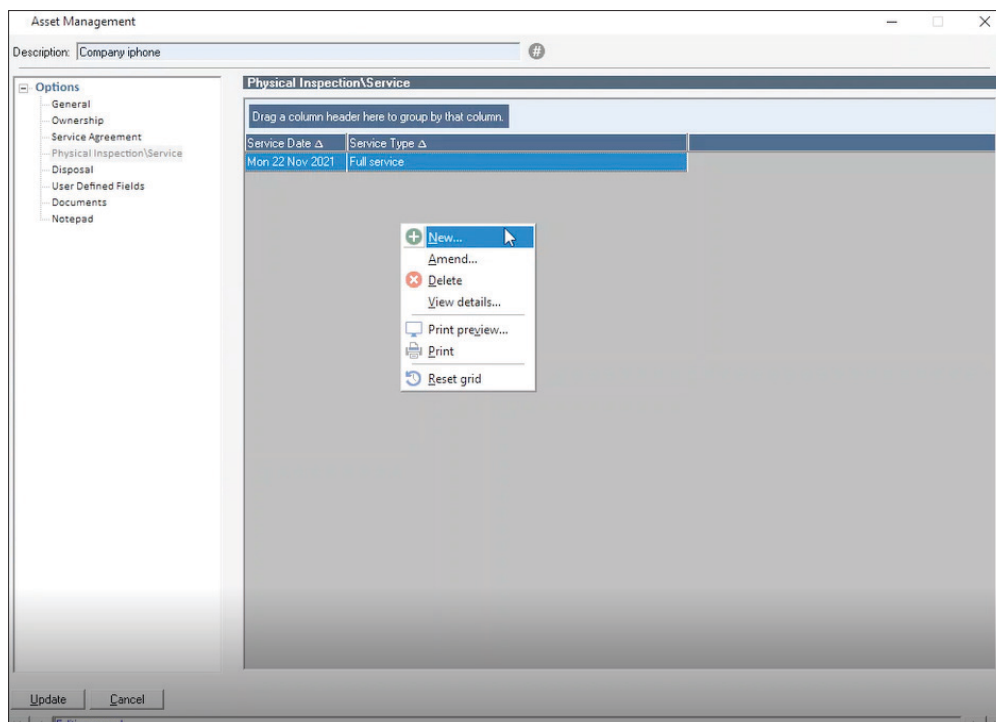
Assets from time to time require inspections to see if the product is running up to standard. This might be a contractual agreement that a company may put in place for an employee to make sure the assets they are given are up to scratch.



The screenshot shows the 'Asset Management' window with the 'Description' field set to 'Company iphone'. The left sidebar lists options: General, Ownership, Service Agreement, Physical Inspection\Service (selected), Disposal, User Defined Fields, Documents, and Notepad. The main area displays the 'Physical Inspection\Service' section with a table. The table has two columns: 'Service Date Δ' and 'Service Type Δ'. The first row shows 'Mon 22 Nov 2021' and 'Full service'. Below the table are 'Update' and 'Cancel' buttons. The status bar at the bottom indicates 'Editing record'.

Service Date Δ	Service Type Δ
Mon 22 Nov 2021	Full service

1. Select the physical inspection / service tab then right click and press new.



2. In the new window that opens fill out the fields within this section. You also have the option of adding documents to this record. To add these right click in the blank space at the bottom of the page and press new.

The screenshot shows the 'Asset Physical Inspection/Service - (New)' window. It contains the following fields and values:

- Service type: Full service
- Service date: Mon 22 Nov 2021
- Supplier: 02
- P.O. number: P09287833
- Purchase date: 09/12/2021
- Purchase amount: 100.00
- Contact: Jane Doe
- Telephone: 01706 783 222
- Email: support@company.co.uk
- Disposal company: 02

Below the fields is a 'Notes' section with a large yellow text area. At the bottom, there is a 'Document' table:

Description	File Name	Date and Time	File Size (MB)
Physical Inspection	New Text Document.txt	Mon 22 Nov 2021 11:17	0.

At the bottom of the window are 'Cancel' and 'Ok' buttons.