



Eaco Asset Classes and Inspections

USER GUIDE

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INTRODUCTION

"Depreciation...is supposed to reflect the way that assets lose value over time. But a well-maintained building typically gains value" -

James B. Stewart

A lot of hard work has gone into building up the assets that exist around us. Now it is time to care for those assets and make them last – you can do that with Eaco. Eaco's power and flexibility enables you to track assets you are connected with and provides a complete history of who has done what and when in relation to each asset. Brilliant! It's just as management should be!

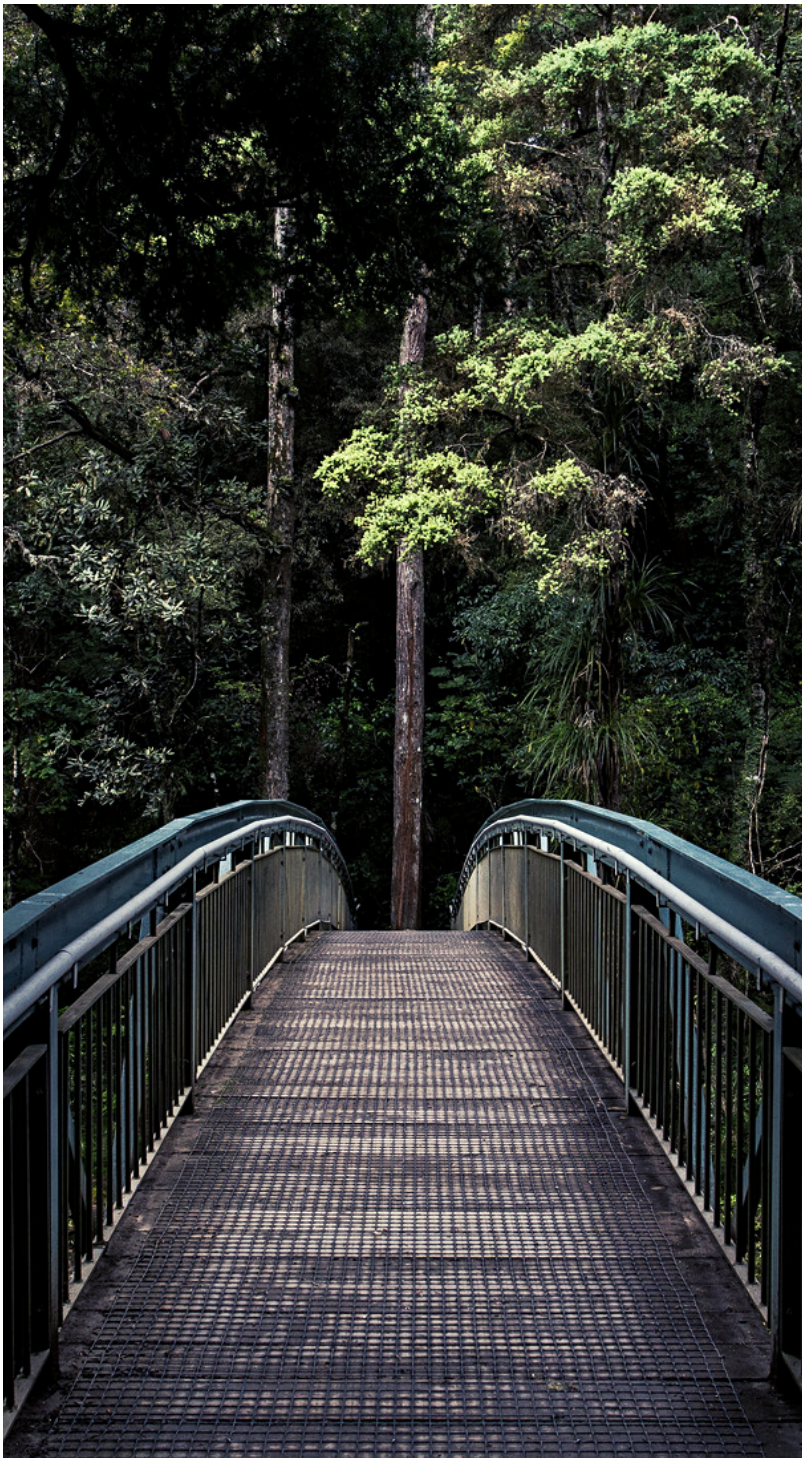
So, what is a Managed Asset? Well...Eaco lets you choose and exactly what you wish to track as an Asset. For buildings, you can use Eaco's Managed Properties functionality. For everything else, Managed Assets lets you get down deeper into the value chain - you can choose levels of a building, wings of a building, individual rooms, or get into the granular level of each particular asset within a building such as the air conditioning units, hot water systems, etc. The choice is yours.

Some Eaco clients have even set up their system to include mobile assets such as cars, trucks, tools and equipment. Others have taken that to another level such as identifying each battery within these pieces of equipment. Eaco enables you to get as granular as you desire.

Once you have established your Managed Assets, they can then be associated with every Job that relates to each one of them, enabling you to quickly bridge the view of all Jobs with what has been done on each asset. Furthermore, this connection ties into Eaco's powerful reporting functionality enabling you to create custom reports for your team and your clients in relation to the assets you are responsible for.

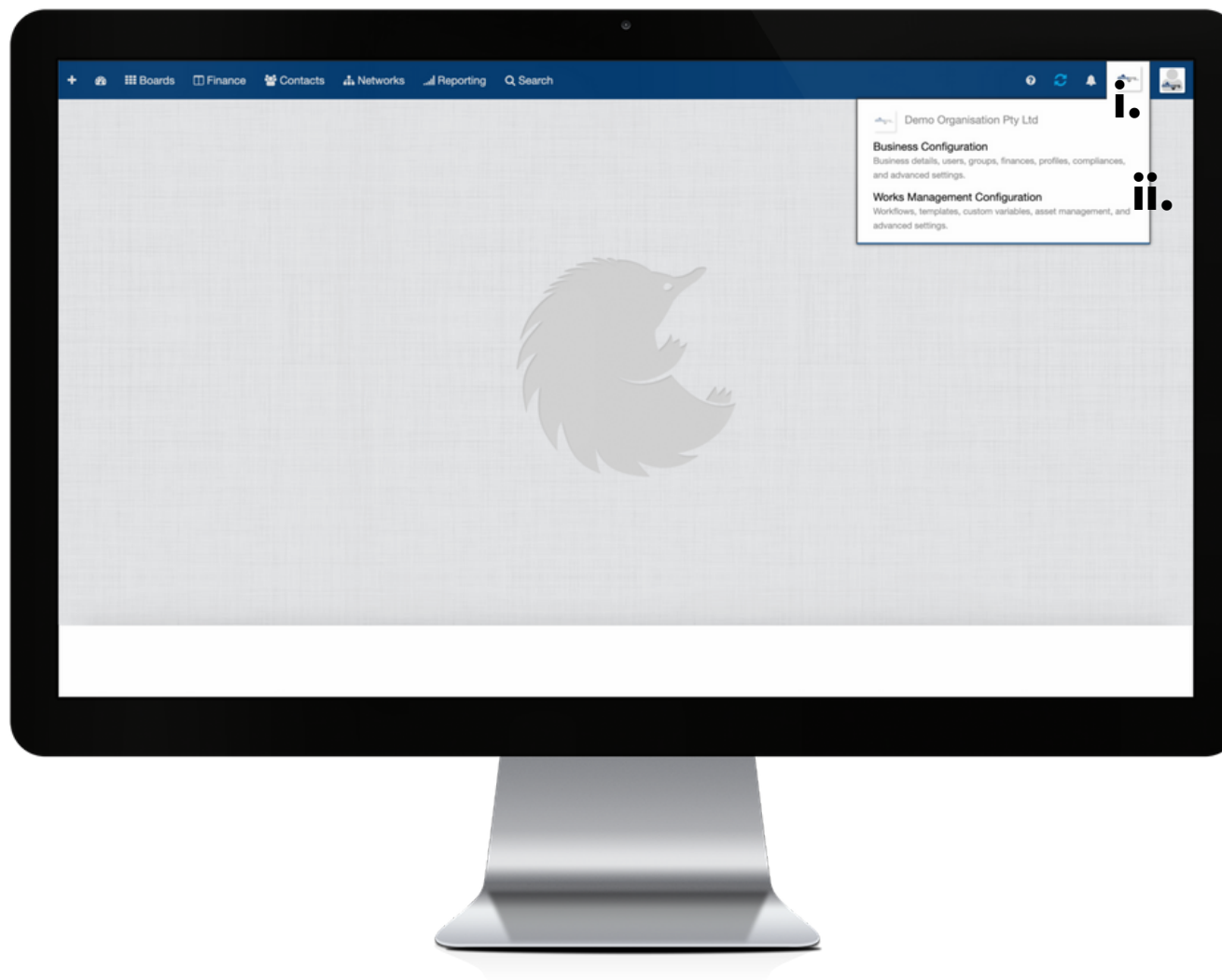
And...if you want to take things to an even more powerful level, the Managed Assets feature enables you to automatically create new Jobs for each asset by using the Eaco Programmed Jobs functionality. Let's say you have to service an Air Conditioning unit every six months - simply set up a Programmed Job to manage this requirement every six months and voila (!), it appears in your work queue.

#assetprotection



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COMMUNICATE AND
OPTIMISE

1. GET STARTED

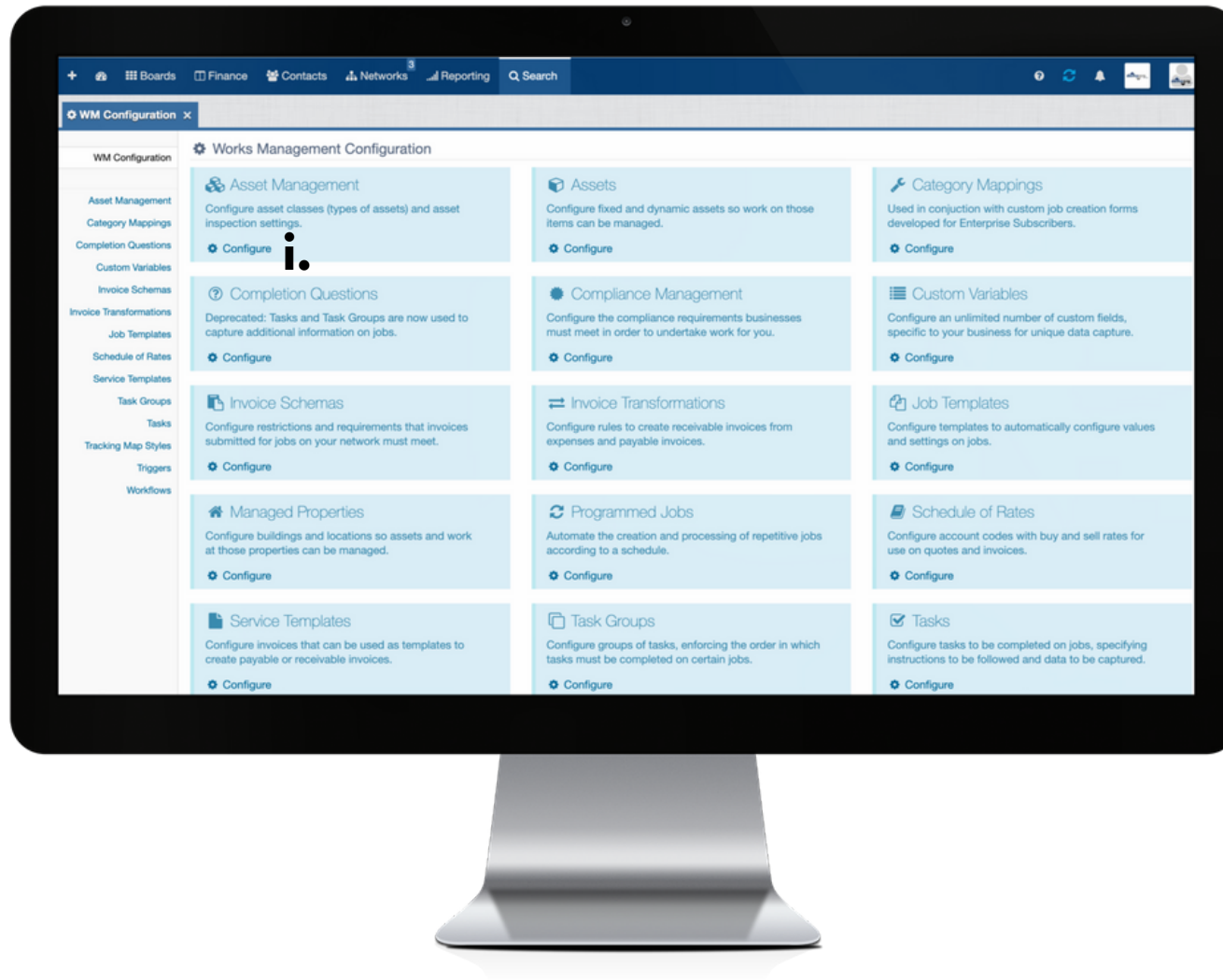


Establish the settings for your Managed Assets feature via your organisation's Works Management Configuration (WM Configuration) section.

Your WM Configuration section can be found by clicking on the icon (i) for your Organisation's Profile and then selecting the Works Management Configuration from within the drop down menu (ii).

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2. WM CONFIGURATION



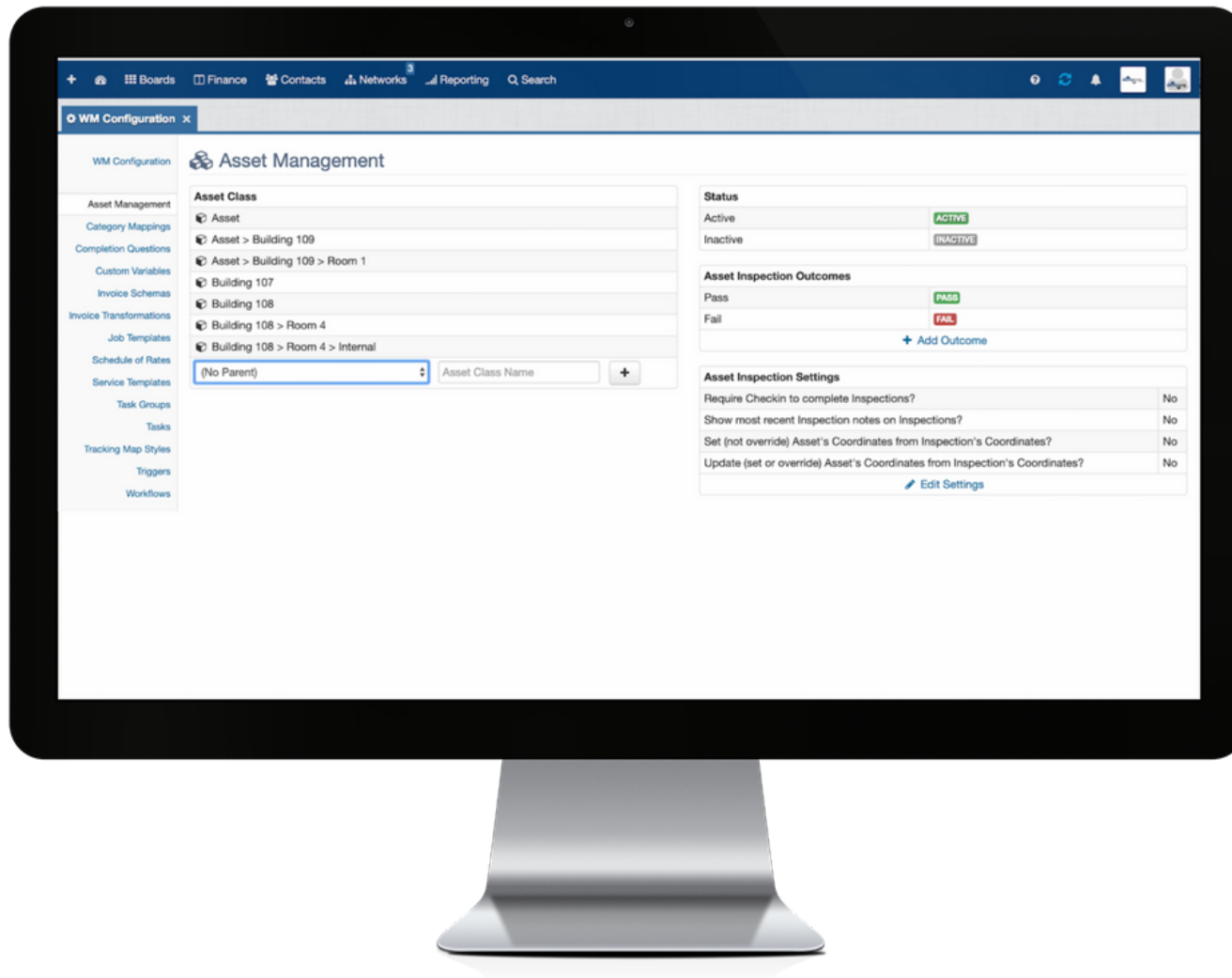
i: To commence establishing the settings for your Managed Assets feature, click on Configure.

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3. SETTINGS: MAIN VIEW





Configure settings to establish your business' Asset Classes (types of assets) and Inspection settings in relation to the assets to properties you manage (Managed Properties).

Legend:

Asset Class: lists all types of asset classes.

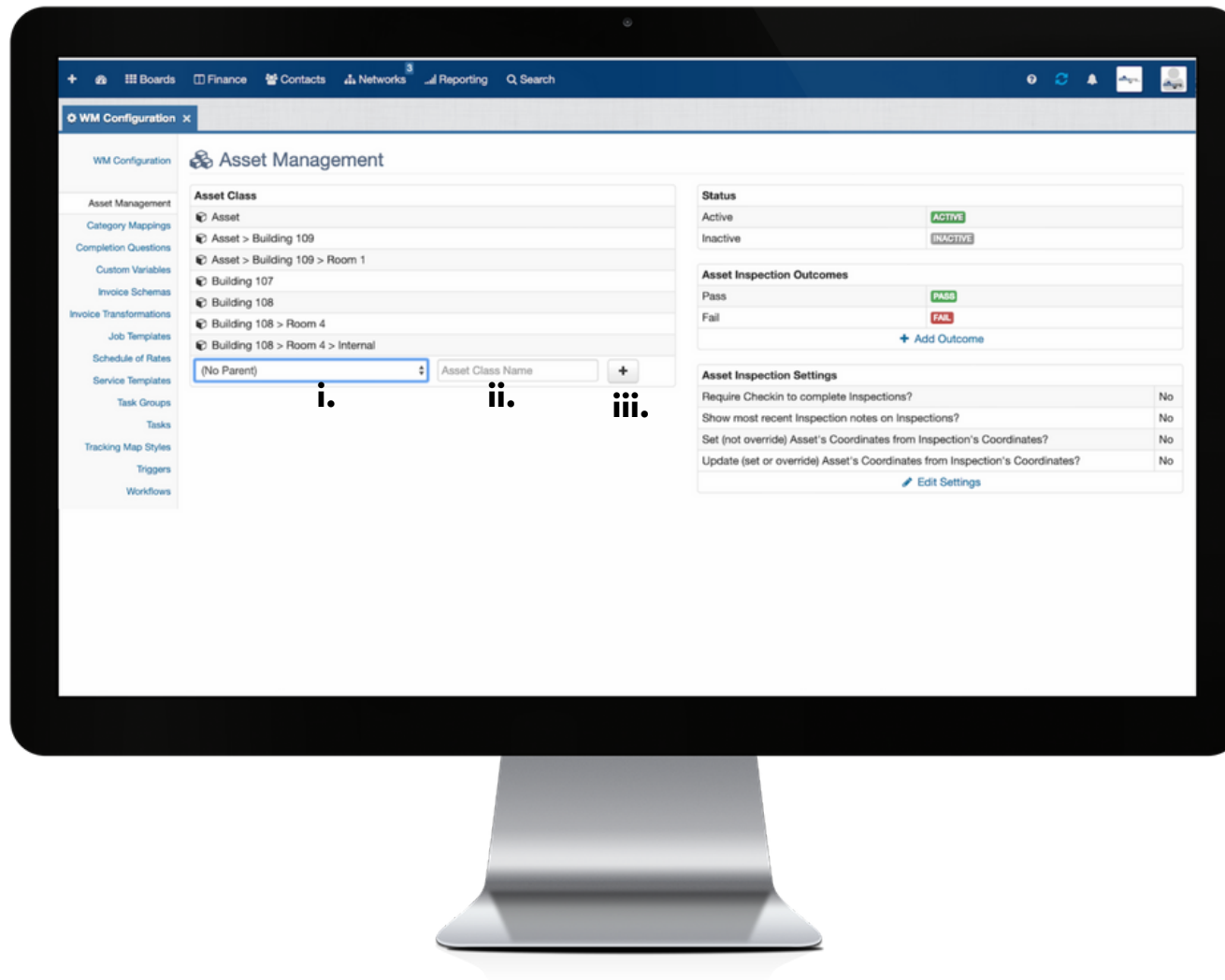
Status: displays the Status that can be applied to an Asset Class to indicate whether it is Active or Inactive.

Asset Inspection Outcomes: enables you to set custom created inspection outcomes that can be applied to job tasks.

Asset Inspection Settings: default settings to be applied to Asset Inspection jobs.

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4. ADD A NEW ASSET CLASS TYPE



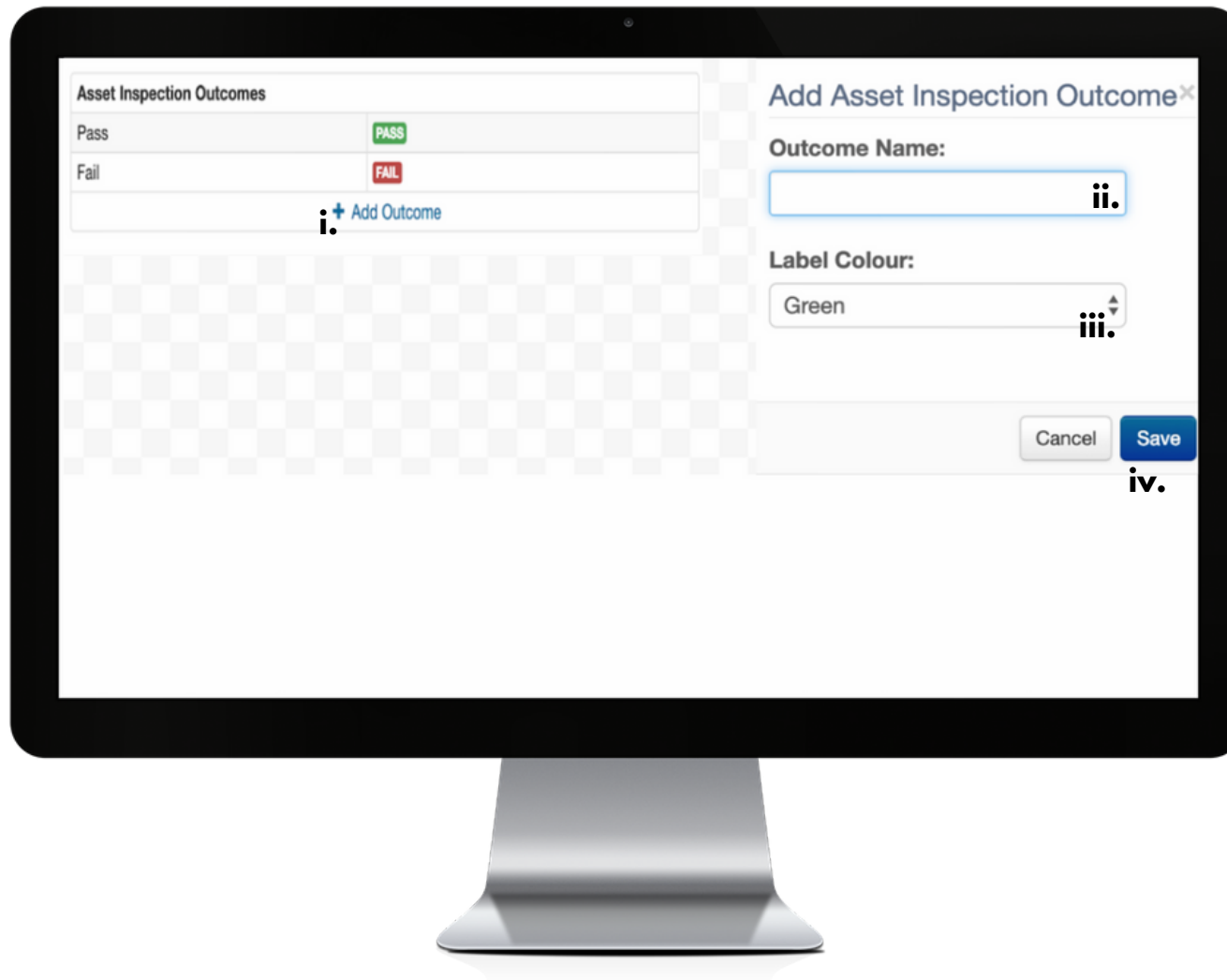
i: select Parent (i.e. if the Asset Class should be linked to a primary Asset Class).

ii: enter the name of the Asset Class.

iii: click the + icon to confirm/add the newly created Asset Class.

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5. ADD AN ASSET INSPECTION OUTCOME



i: Click the + icon to open the Add Asset Inspection Outcome dialog box.

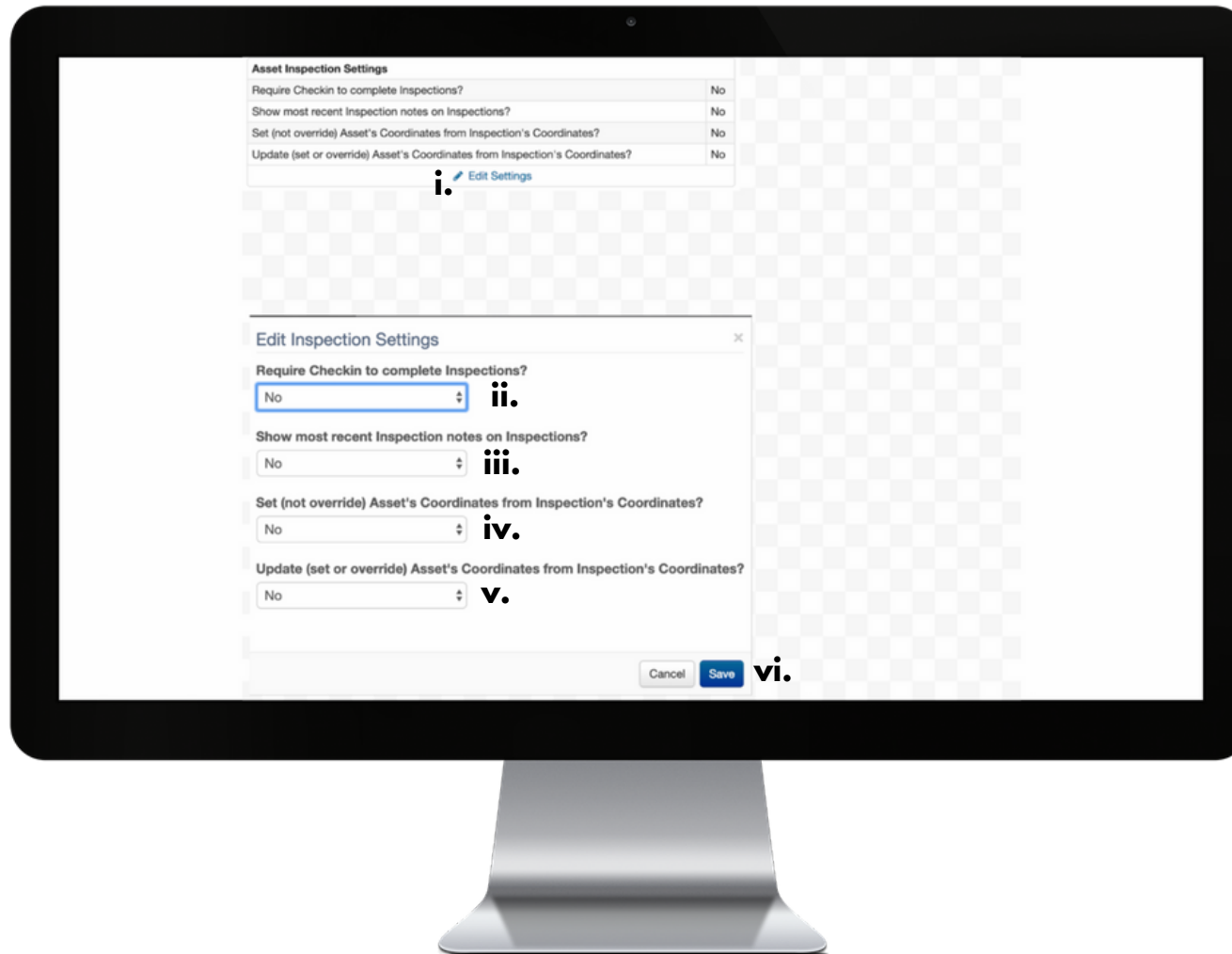
ii: Enter the name of the Asset Inspection Outcome.

iii: Use the drop down box to select a label colour to apply to the Asset Inspection Outcome.

iv: click Save to apply the settings.

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6. EDIT ASSET INSPECTIONS



- i:** click the Edit icon to open the Edit Inspections Settings dialog box.
- ii:** use the drop down menu to apply the relevant setting.
- iii:** use the drop down menu to apply the relevant setting.
- iv:** use the drop down menu to apply the relevant setting.
- v:** use the drop down menu to apply the relevant setting.
- vi:** click Save to apply the settings.