

Equipment Register in Bromcom Finance

Welcome to the Webinar. The session will begin shortly.

Please ensure that you also have an audio connection either through a headset and microphone attached to your computer or by telephone to the published number.

You will join the session muted but there is a chat facility available where you can type questions.

This session will be recorded and shared with colleagues after the session. By attending you agree and accept you may be captured in the recording.

Equipment Register in Bromcom Finance

Introductions

Alison York
Digital Services



Welcome

Feel free to ask questions throughout either in the chat or put your hand up.

We will share these slides and the recording after the session.

There will be time to ask questions at the end of the session.



What we will look at

Configuration

Rooms

Populating the Register

Inspections and Stock Take

Reporting

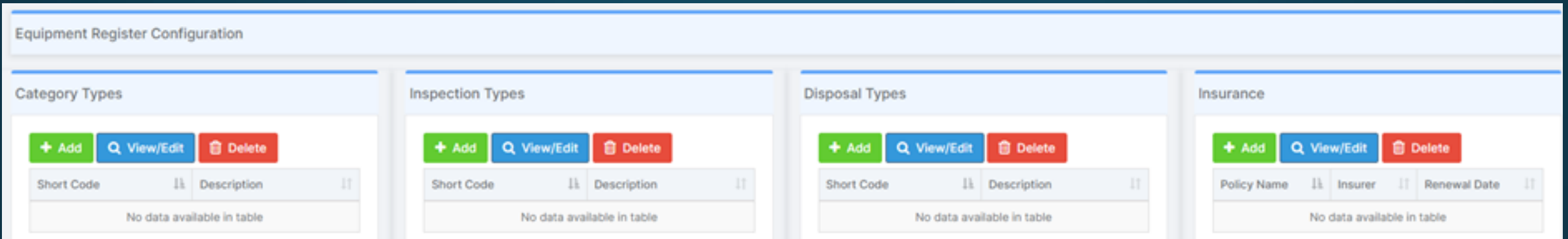
ASSET MANAGEMENT

Equipment Register

Configuration

Finance > Maintenance
> Equipment Register
Configuration





Category Types

This is a way of grouping items together and can be used for filtering and reporting E.g.

- Electrical Equipment
- Play Equipment
- Office Equipment

Inspection Types

This is where you set up inspections you wish to record E.g.

- Electrical (PAT) Testing
- Fire Fighting

Disposal Types

This is where you set up disposal types you wish to record E.g.

- Beyond economical repair
- Theft
- Sold

Insurance

This is unlikely to be used as insurance is centrally organised. It would be for recording different insurance policies which apply to different items

Category Types

Equipment Register Configuration

Category Types

[+ Add](#) [View/Edit](#) [Delete](#)

Short Code	Description
No data available in table	

Category

Short Code

Description

[Save](#) [Cancel](#)

Inspection Types

Inspection Types

[+ Add](#) [View/Edit](#) [Delete](#)

Short Code	Description
No data available in table	

Inspection

Short Code

Description

[Save](#) [Cancel](#)

Disposal Types

Disposal Types

[+ Add](#) [View/Edit](#) [Delete](#)

Short Code	Description
No data available in table	

Disposal

Short Code

Description

[Save](#) [Cancel](#)

ASSET MANAGEMENT

Equipment Register

Rooms

+ New

Room Details

Room



Will have pulled through from SIMS. You may want to edit them

Config > Administration > Rooms

To Edit an existing Room click on the Magnifying Glass icon to show the list of Rooms.

Room Selector

Room Name

Room Description

Room Type
<NOT SELECTED> ▾

Room Capacity

Reference

Active Date Filter

31/03/2023

31/03/2023

54 results found | 0 items selected

Room Name	Room Description	Room Type	Capacity	Reference
A1	Room A1	Classroom	0	A1
A10	Room A10	Classroom	34	CA10
A11	Room A11	Classroom	0	L00001
A12	Room A12	Classroom	34	CA12
A13	Room A13	Classroom	34	CA13
A14	Room A14	Classroom	34	C00009
A15	Room A15	Classroom	34	C00010
A16	Room A16	Classroom	34	C00011
A17	Room A17	Classroom	34	C00012
A2	Room A2	Classroom	34	A2
A3	Room A3	Classroom	34	A3
A4	Room A4	Classroom	34	A4
A5	Room A5	Classroom	34	A5
A6	Room A6	Classroom	34	A6
A7	Room A7	Classroom	34	CA7
A8	Room A8	Classroom	34	CA8

- Click on the required Room then click the Done button
- This will open the Room Details page, which can then be Edited
- Note: It is not possible to delete a Room due to the historic data stored against the Room.
- If you give the Room an End Date, it will no longer appear as a choice when selecting a Room

Room Details

Room Name*	<input type="text" value="A12"/>	Description	<input type="text" value="Room A12"/>
Site Name	<input type="text" value="<NOT SELECTED>"/>	Block	<input type="text" value="<NOT SELECTED>"/>
Start Date*	<input type="text" value="27/08/2017"/> <input type="button" value="Calendar"/>	End Date	<input type="text"/> <input type="button" value="Calendar"/>
Main Subject	<input type="text" value="English"/>	Room Type*	<input type="text" value="Classroom"/>
Staff Name	<input type="text"/>		
Capacity	<input type="text" value="34"/>	Available PCs	<input type="text"/>

Interactive WhiteBoard

Data Projector

TV & VCR

OHP & Screen

Blackout

- Click the Save button when completed

 New


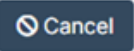
Room Details

Room





Config > Administration > Rooms

Clicking on the New button, will open a Room Details page.

Room Details

Room Name*	<input type="text"/>	Description	<input type="text"/>
Site Name	<NOT SELECTED> ▼	Block	<NOT SELECTED> ▼
Start Date*	<input type="text"/> 	End Date	<input type="text"/> 
Main Subject	<NOT SELECTED> ▼	Room Type*	<NOT SELECTED> ▼
Staff Name	<input type="text"/>		
Capacity	<input type="text"/>	Available PCs	<input type="text"/>

Interactive WhiteBoard OHP & Screen
 Data Projector Blackout
 TV & VCR

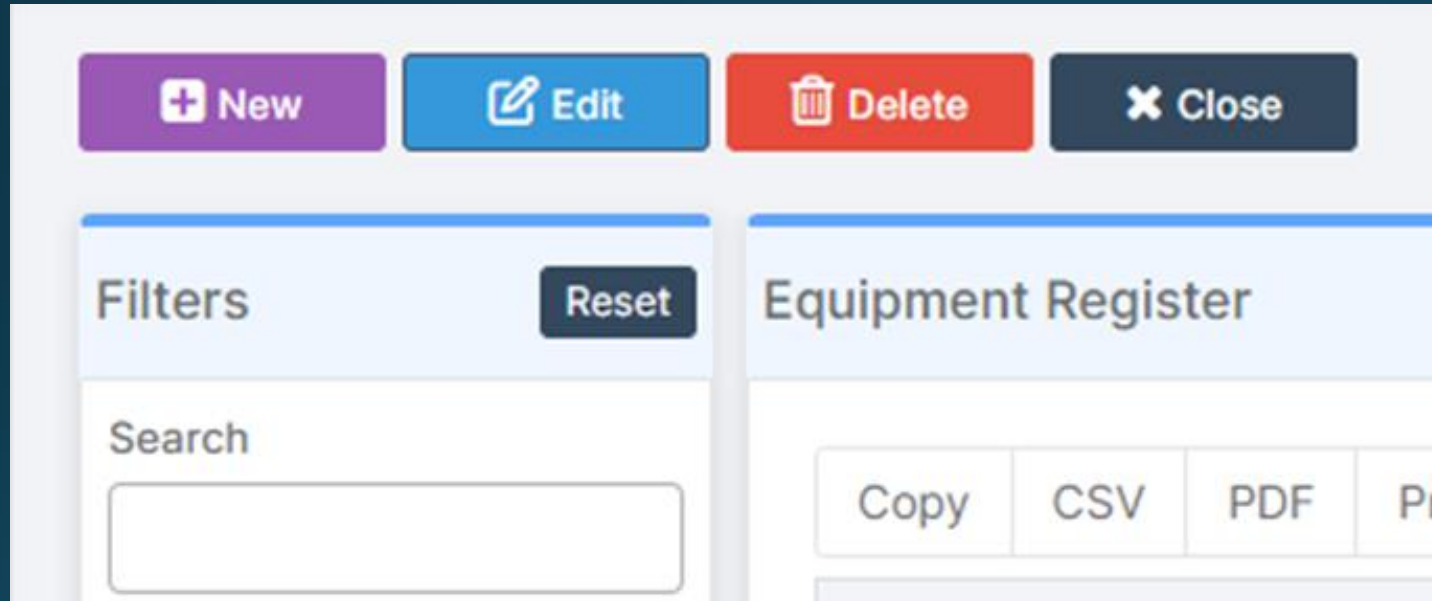
- Only fields with * are required but you can always add additional data later if needed.
- NOTE: The Room Name field has a limit of 10 Characters.
- NOTE Do not add in the site name, if you do then it will not save as it will expect 'Block' to be completed.
- Once you are happy with your Room Details, press Create and this will add the Room to your system.

ASSET MANAGEMENT

Equipment Register

Populating the Register

Finance > Asset Management > Equipment Register



Initially will need to populate manually for historical items, there is no facility at the moment to import from a spreadsheet

Identification

Category

× ELEC

Equipment Number

38

Serial Number

123456

Description

Kettle - Electric

Model

Morphy Richards

Security Mark

Quantity

6

Notes

Identification

- Bare minimum have to enter is Identification
- The Equipment Number is automatically assigned

Location and Holder

Holder	Andrews, Christine x ▼
Location	1A,1A x ▼
Main User	Arya, Michelle ▼

Location and Holder

- Where the item is held
- Who is responsible for it
- Main User is populated from the Room details

Invoice Details	
Supplier	<input type="text"/>
Invoice Number	<input type="text"/>
PO Number	<input type="text"/>
Invoice Date	<input type="text"/>
Unit Cost	<input type="text" value="0.00"/>
Cost Centre	<input type="text"/>
Ledger Code	<input type="text"/>
Fund Code	<input type="text"/>

Invoice Details

- Can be added manually
- Cost Centre/Ledger Code/Fund Code – can not be added manually, these are populated when items are pulled through from the invoice

Support Contract

Support Contract	<input type="text" value="<Not Selected>"/>
Telephone	<input type="text"/>
Contact	<input type="text"/>
End Date	<input type="text"/>

Support Contract

- Can be added if required
- Has to be included in the Supplier List to pull to the drop down

Disposal

Reason	<Not Selected> ▼
Disposal Date	<input type="text"/>

Disposal

- To be used when an item is disposed of through what ever method.
- Dropdown is populated from the Configuration

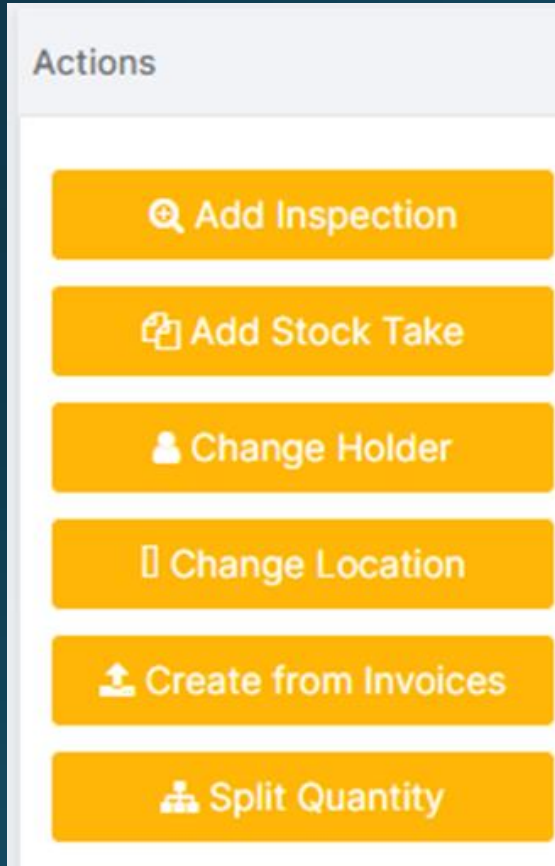
Insurance

Insurance	<Not Selected>
Insurer	
Number	
Telephone	
Contact	
Renewal Date	
Policy Details	

Insurance

- Not used

Additional Options



Use to add an Inspections and results to items

Use to add Stock Takes and results to items

Use to Change the Holder of items

Use to Change the Location of items

Use to populate the register from invoices paid through the system

Use to Split the Quantity to groups of items or individual items

Create from Invoices

↑ Create from Invoices

Minimum unit cost – a low figure will avoid pulling through low value items

From Date/To Date – will default to current year

New – shows all new items added

Deferred – shows any previously deferred items

Rejected - shows any previously rejected items

Bulk Create Equipment Records

Minimum Unit Cost From Date To Date New Deferred Rejected

Invoice Date	Invoice Number	Description	Quantity	Import Status	Category	Net Amount	Supplier	PO Number
No data available in table								

Search to populate

Bulk Create Equipment Records

Minimum Unit Cost From Date To Date New Deferred Rejected

Invoice Date	Invoice Number	Description	Quantity	Import Status	Category	Net Amount	Supplier	PO Number
14/03/2023	44444	StabiloEASYorkinal Blu Refill	1	Defer		3.79	GLS Educational Supplies	CPPO0001
14/03/2023	44444	Paint	10	Defer		29.95	GLS Educational Supplies	CPPO0001
14/03/2023	A225	Test A	0	Defer		50.00	3P Learning Limited	
14/03/2023	B4444	Test	0	Defer		500.00	Active Learning	
14/03/2023	B4444		0	Defer		5.00	Active Learning	
14/03/2023	B44445	Test	0	Defer		66.00	AGP Play	
27/03/2023		TestA	0	Defer		552.00	3P Learning Limited	
27/03/2023	B4444	A4 Rey Adagio Copier Paper Strong/Intensive Shades Lavende	50	Defer		1,066.50	YPO	CPPO0006

Import Status– select as required
Accept – to add
Defer – to defer to another import
Reject – to reject from the import

Category – select the appropriate category from the drop-down list

Accept All/Defer All/ Reject Buttons

When selections complete – Process to import

Equipment Records(s) created
successfully.



Bulk Create Equipment Records

Description	Equipment Number	Category	Quantity
Paint	39	PLAY	10

✕ Close

Imported Items

No Holder or Location – highlight and click Edit to add in

The screenshot shows the 'Equipment Register' interface. On the left is a 'Filters' sidebar with a 'Reset' button and dropdown menus for 'Search', 'Category', 'Location', and 'Holder'. The main area contains a table with the following data:

Description	Equipment Number	Category	Holder	Location	Quantity	Disposed
A4 Rey Adagio Copier Paper Strong/Intensive Shades Lavende	39	PLAY			50	
StabiloEASYoriginal Blu Refill	38	PLAY			1	

Buttons for 'Copy', 'CSV', 'PDF', 'Print', 'Select All', and 'Select None' are located above the table. The 'Holder' and 'Location' columns for the second row are highlighted with a red box.

Invoice Details

Supplier

GLS Educational Supplies

Invoice Number

44444

PO Number

CPPO0001

Invoice Date

14/03/20

Unit Cost

5.99

Cost Centre

2007

Ledger Code

21131E

Fund Code

01

- Invoice details are completed

Change Holder

 Change Holder

Change holder

Description

Holder

New Holder

Change holder

Description

Holder

New Holder

- Can highlight more than one item and bulk change
- Useful if staff have left

Change Location

Change Location

Change location

Description

Location

New Location

Change location

Description

Location

New Location

- Can highlight more than one item and bulk change
- Useful if staff have moved round

Split Quantity

 Split Quantity

Split Equipment Record

Description Quantity

Split into individual records: Create a single record for each of the items

Split into 2 records: Create one new record by splitting a number of items from original record

Individual Records

Split Equipment Record

Description	Category	Holder	Location	Quantity
Kettle - Electric	ELEC	Mrs C Andrews	1A	1

New Equipment Number(s)

Split Quantity

 Split Quantity

Split Equipment Record

Description Quantity

Split into individual records: Create a single record for each of the items

Split into 2 records: Create one new record by splitting a number of items from original record

Quantity of items to allocate to the new equipment record

Split into 2 records

Enter the quantity to be split

Split Equipment Record

Description	Category	Holder	Location	Quantity
Paint	PLAY			2

New Equipment Number(s)

ASSET MANAGEMENT

Equipment Register

Inspections & Stock Take

Add Inspection

 Add Inspection

Save & Close Cancel Active Financial Year:

Equipment Inspections

Description: Type:

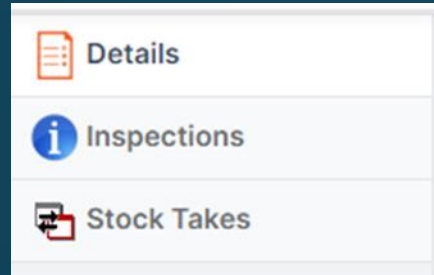
Date: Next Date:

Inspection Supplier: Contact: Telephone:

Search:

Equipment Number	Description	Quantity	Location	Pass	Fail	Unknown
38	Kettle - Electric	1	1A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40	Whiteboard	10	2A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
41	Kettle - Electric	1	1A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
42	Kettle - Electric	1	1A	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Equipment Details shows the result under Inspections



Active Financial Year: 24

New Edit Delete Close

Inspections

Search:

Date	Description	Supplier	Type	Next Date	
20/06/2024	PAT Testing	Ability Smart Ltd	Electrical Inspection	01/06/2026	Pass

Add Stock Take

 Add Stock Take

Save & Close Cancel Active Financial Year

Equipment Stock Take

Description: Date: Next Date:

Search:

Equipment Number	Description	Quantity	Location	Present	Damaged	Missing	Unknown
39	A4 Rey Adagio Copier Paper Strong/Intensive Shades Lavende	50		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Equipment Details shows the result under Stock Takes

Active Financial Year: 24/

New Edit Delete Close

Stock Takes

Search:

Date	Description	Next Date	Status
21/06/2024	Summer Term 2024		Present

ASSET MANAGEMENT

Equipment Register

Reporting

For quick reporting
use the **Filters** and the
Grid Actions

Equipment Register

Copy CSV PDF Print Select All Select None

Filters

Reset

Search

Category

<Not Selected>

Location

<Not Selected>

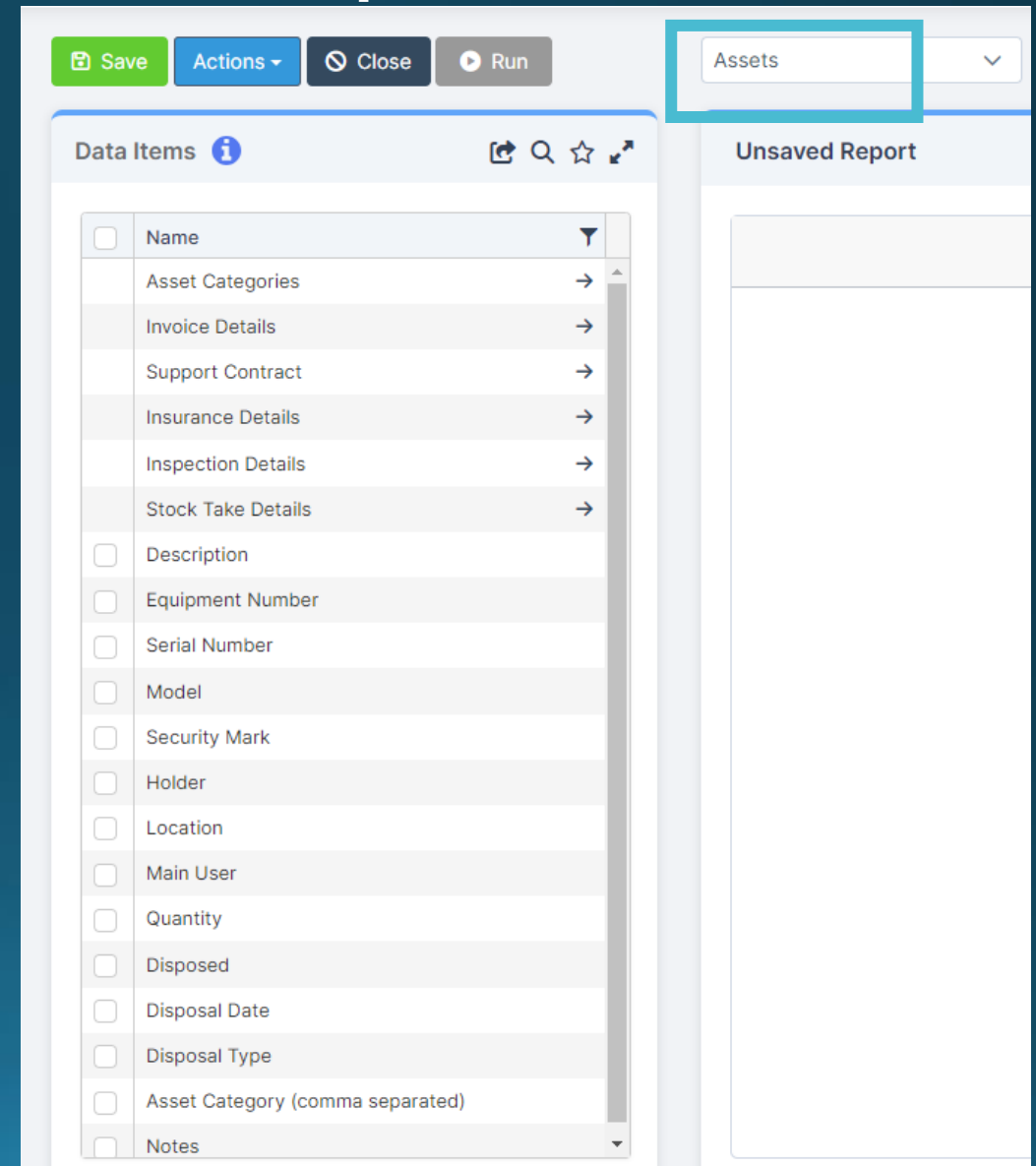
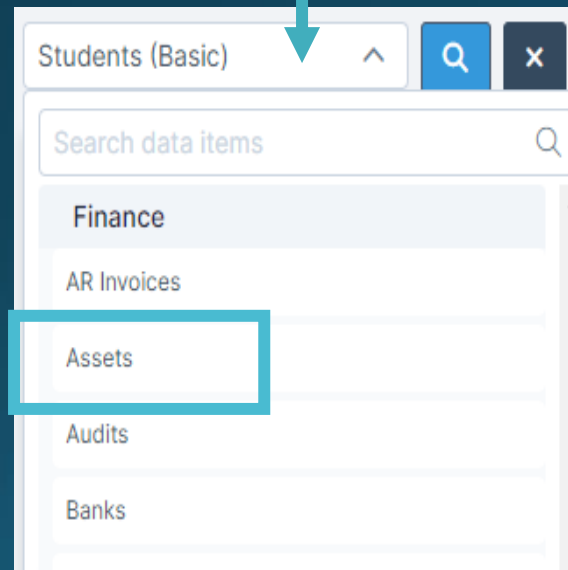
Holder

<Not Selected>

Include Disposed

Reports > AdHoc > Quick Report > Create New Report

Select Finance > Assets



LET'S LOOK AT
THE TRAINING
DATA

QUESTIONS



THANKYOU