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.

DIGITAL SERVICES
FOR SCHOOLS AND ACADEMIES

Coventry City Council

DIGITAL SERVICES
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Coventry City Council

Equipment Register in Bromcom Finance

Introductions

Alison York
Digital Services

DIGITAL SERVICES
FOR SCHOOLS AND ACADEMIES

Welcome

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

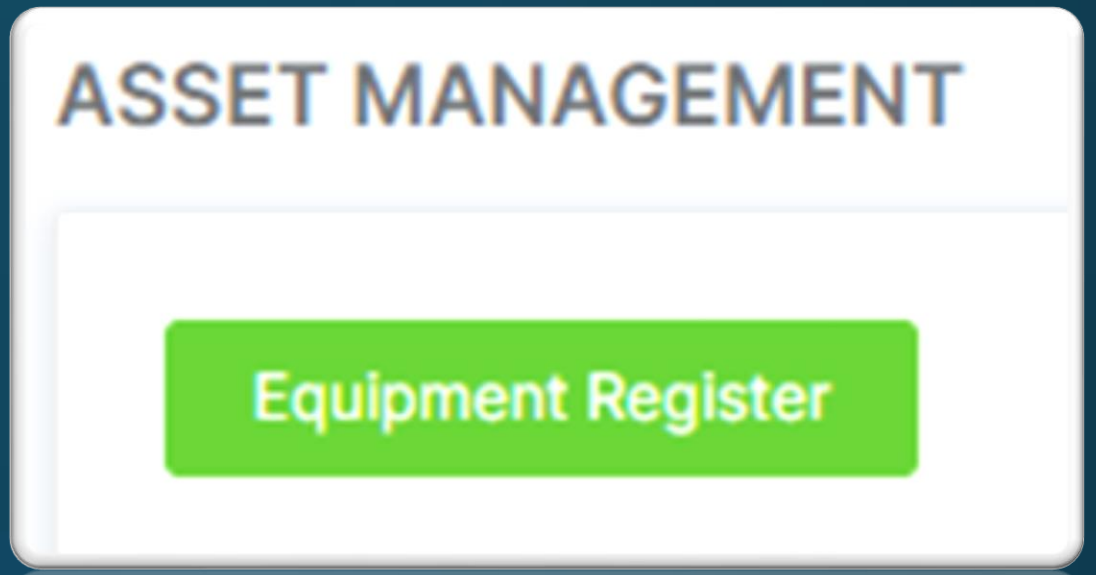
We will share these slides and the recording after the session.

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

DIGITAL SERVICES
FOR SCHOOLS AND ACADEMIES

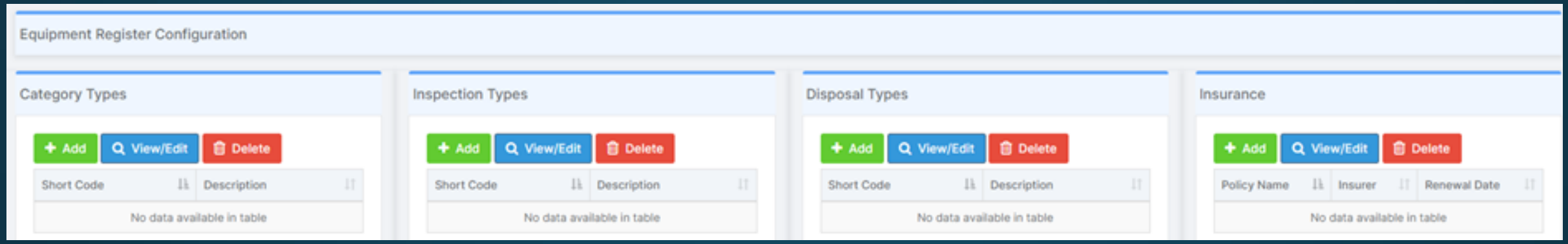
What we will look at

- Configuration
- Rooms
- Populating the Register
- Inspections and Stock Take
- Reporting



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

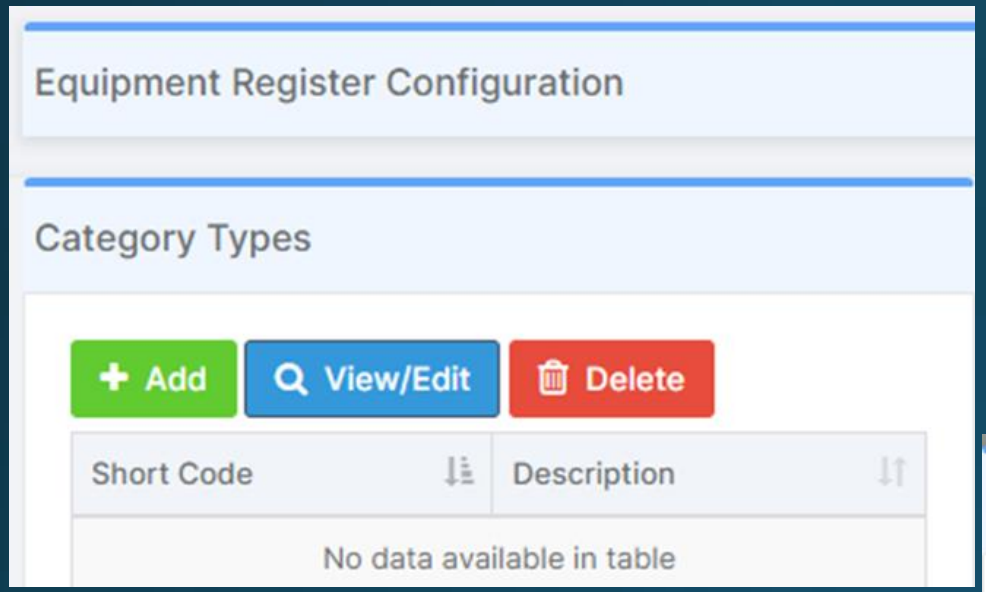
This is where you set up disposal types you wish to record E.g.

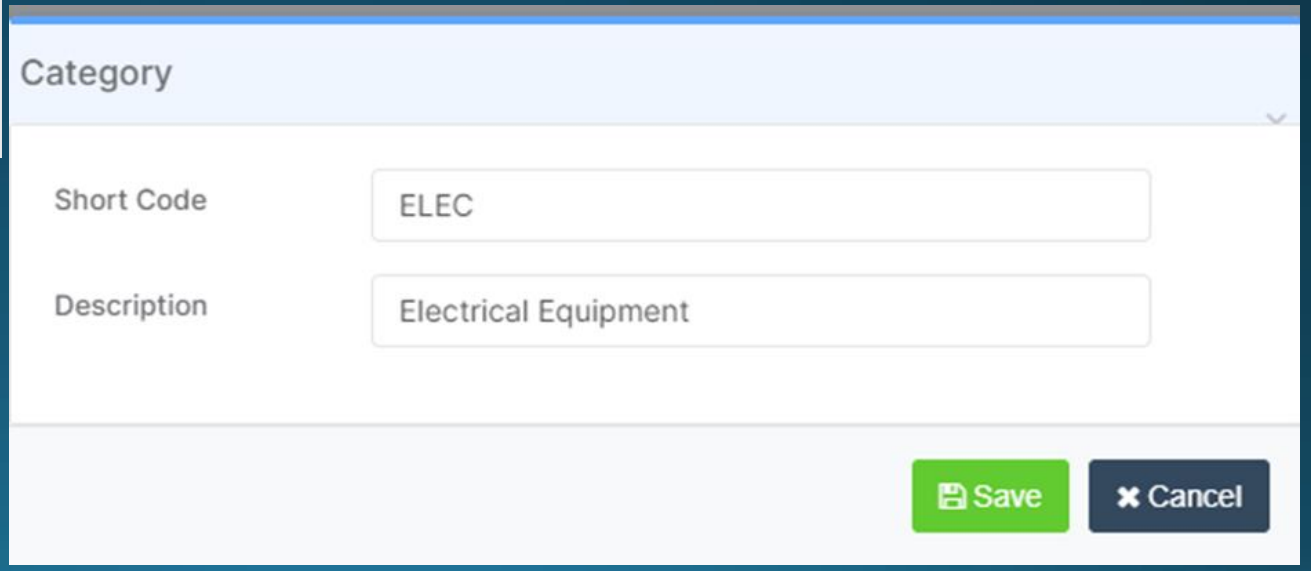
- Beyond economical repair
- Theft
- Sold

Insurance

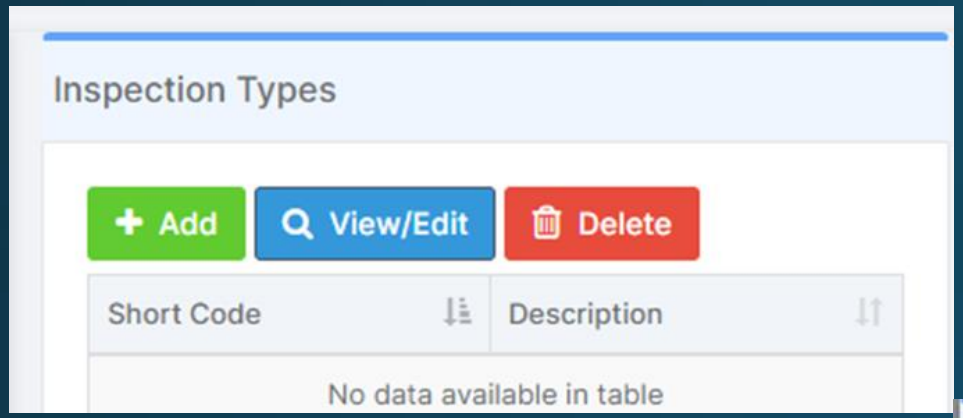
This is unlikely to be used as insurance is centrally organised. It would be for recording different insurance policies which apply to different items

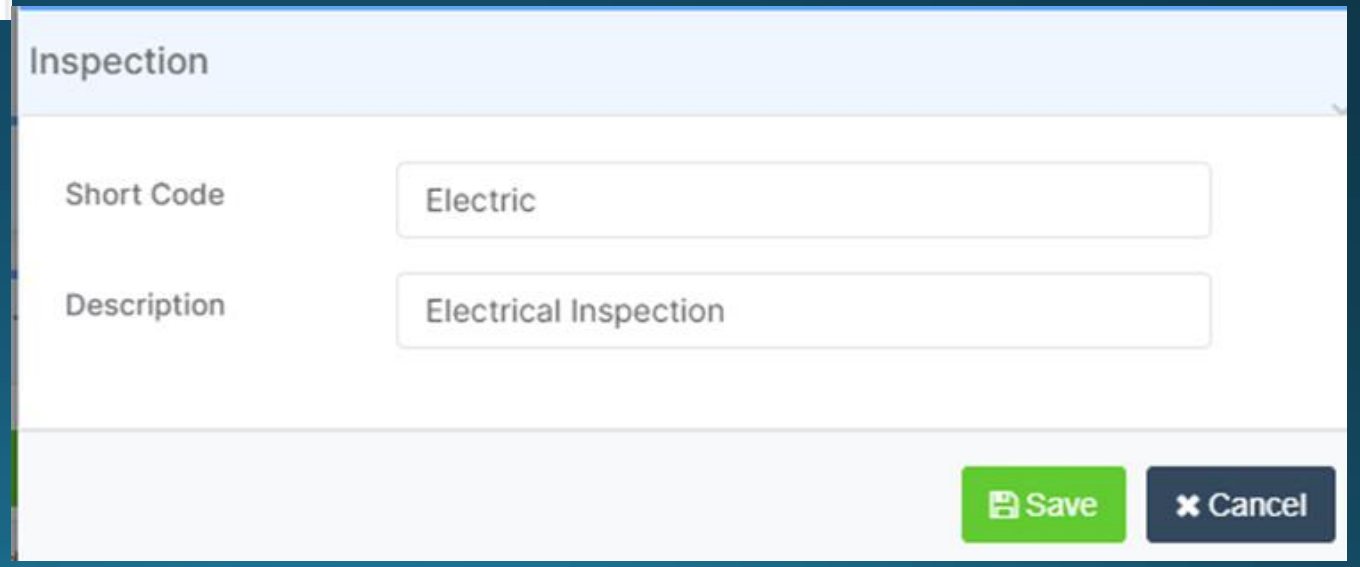
Category Types



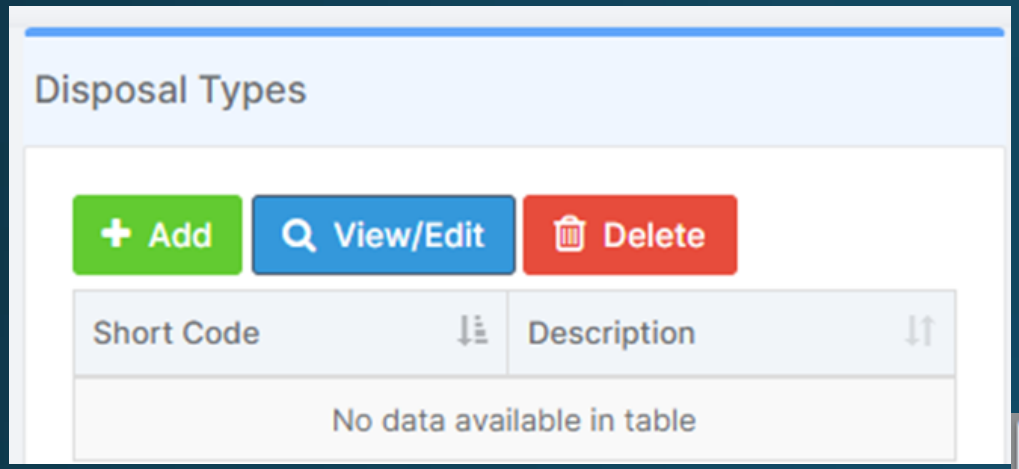


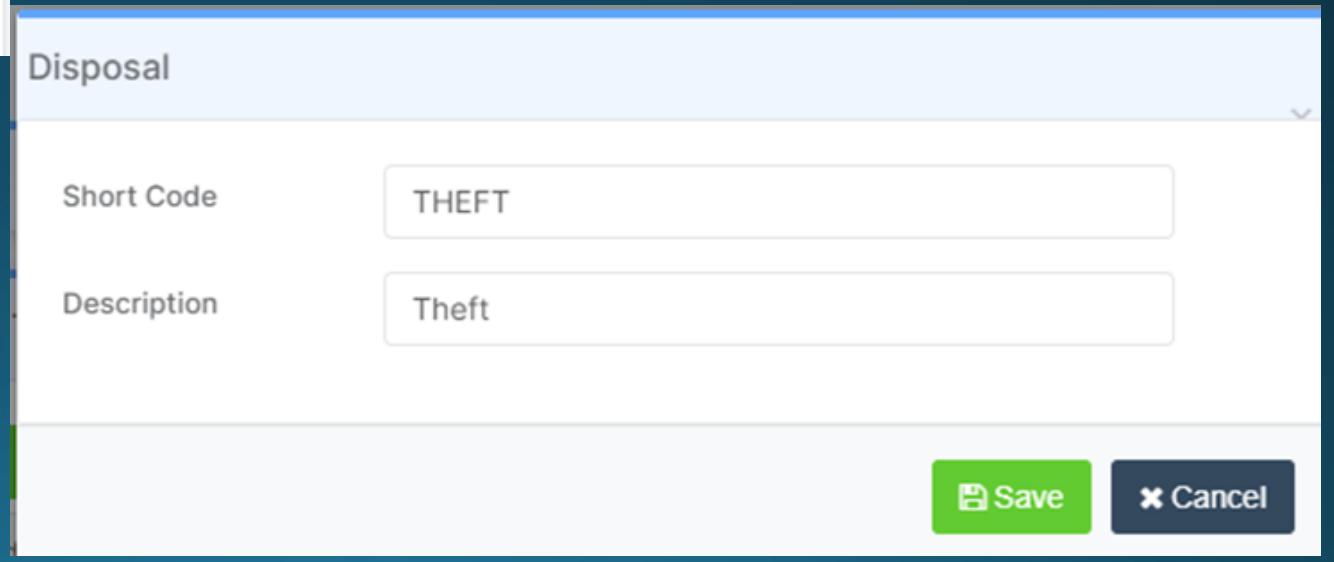
Inspection Types

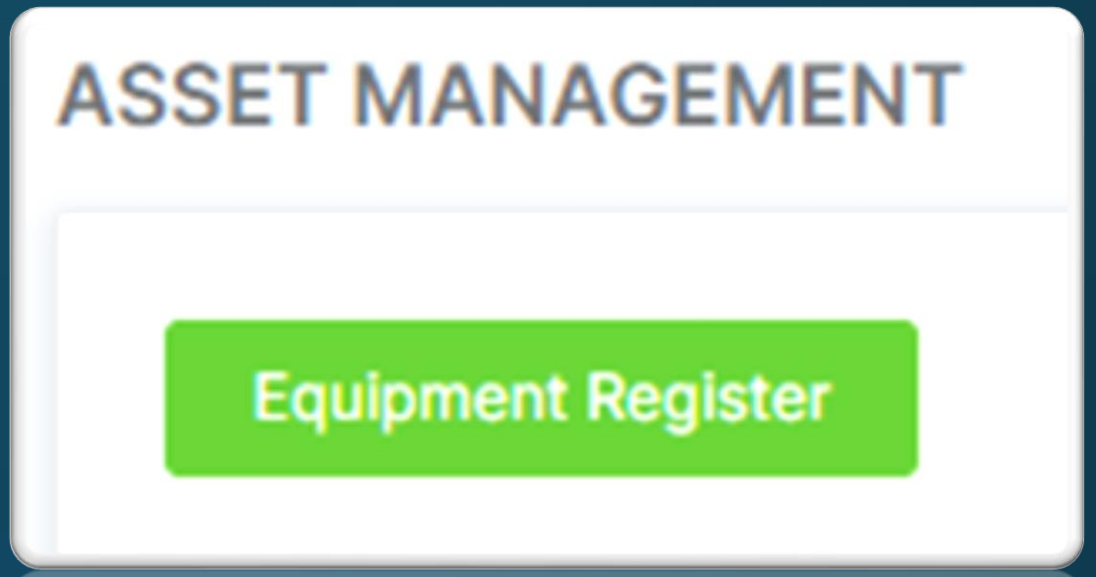




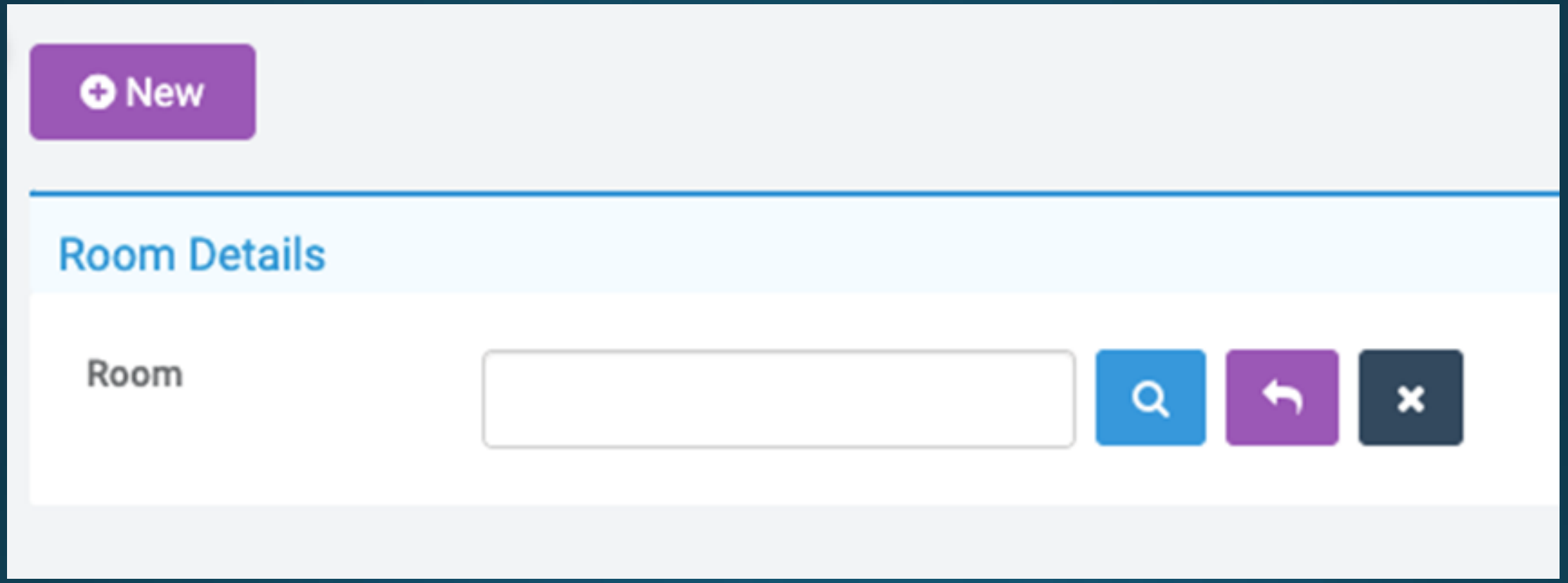
Disposal Types







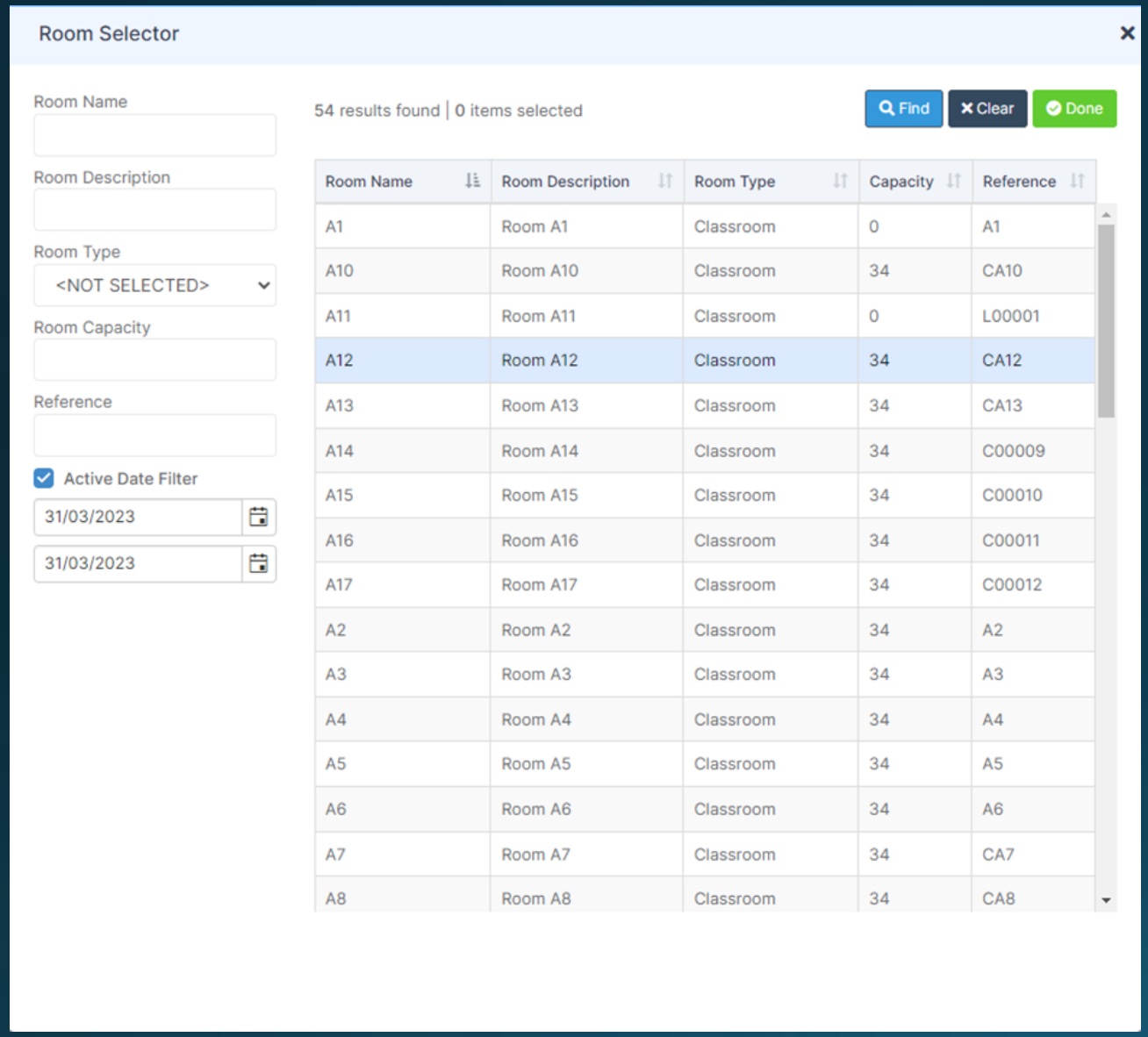
Rooms



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

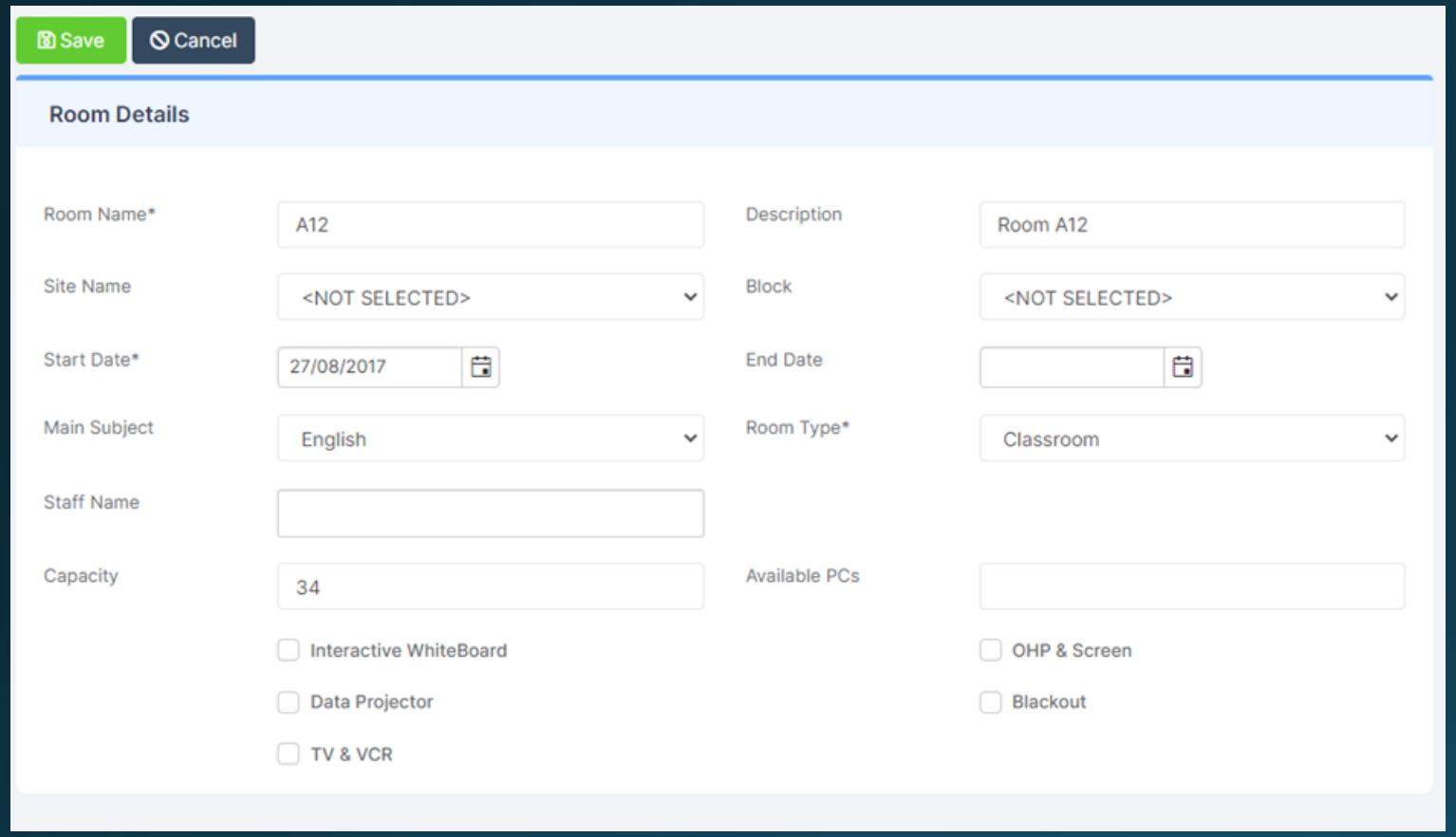
Config > Administration > Rooms

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

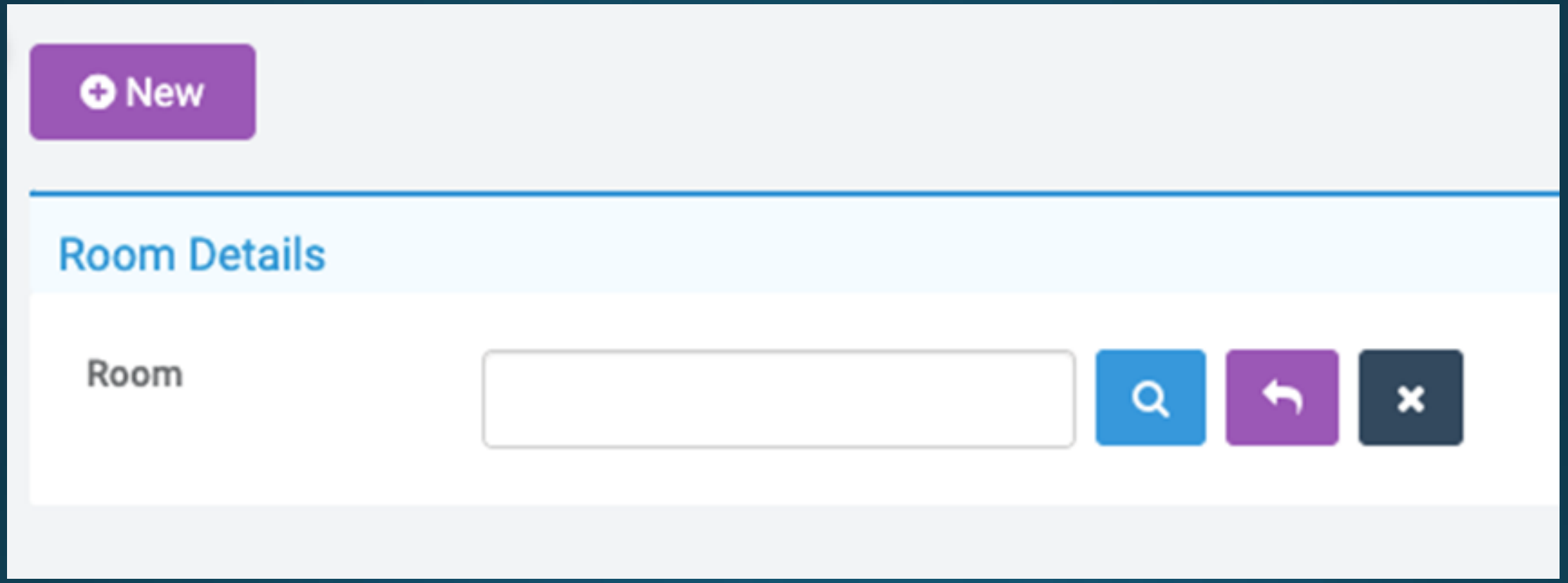


- Click on the required Room then click the Done button
- This will open the Room Details page, which can then be Edited

- 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

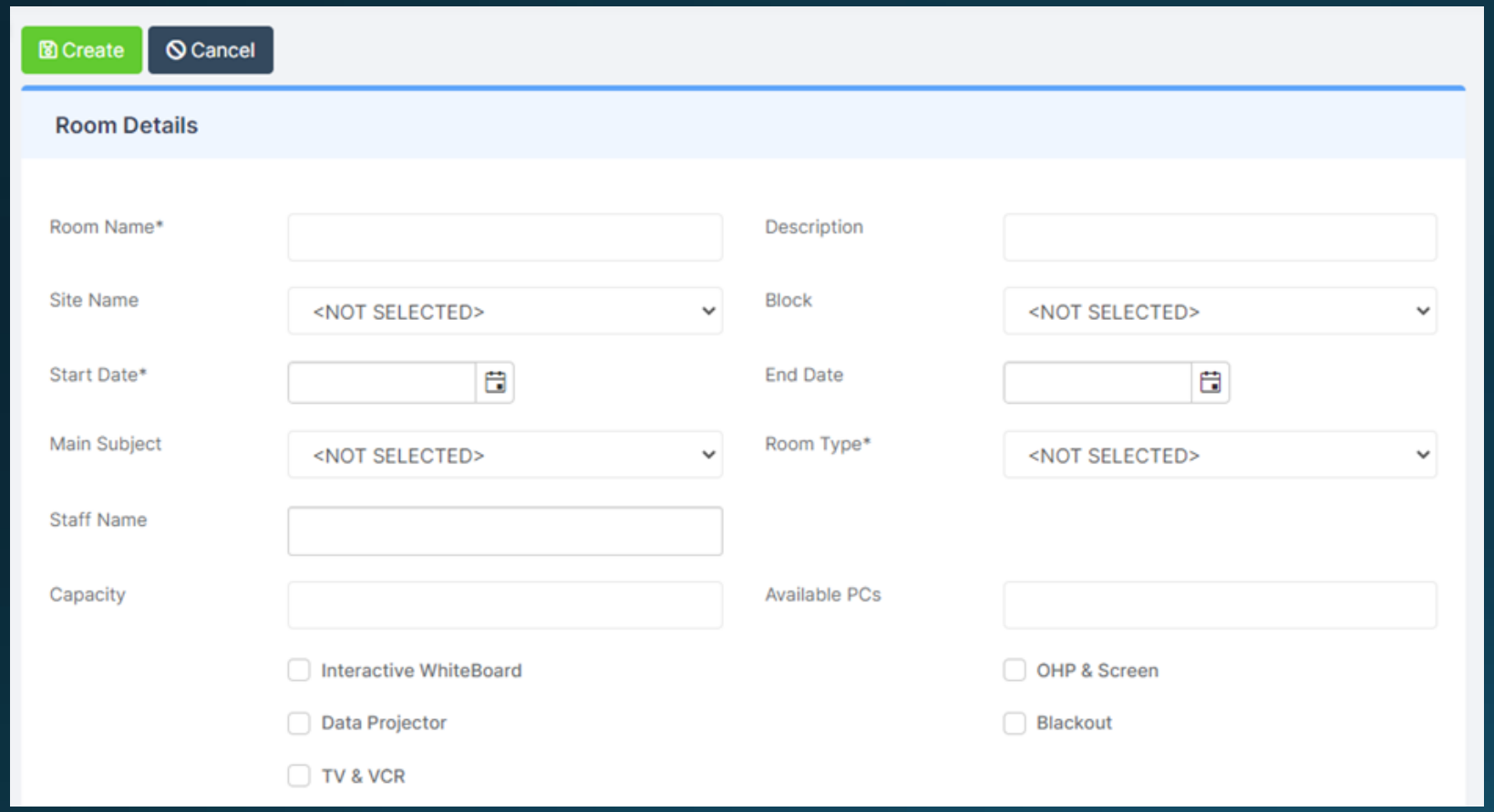


- Click the Save button when completed

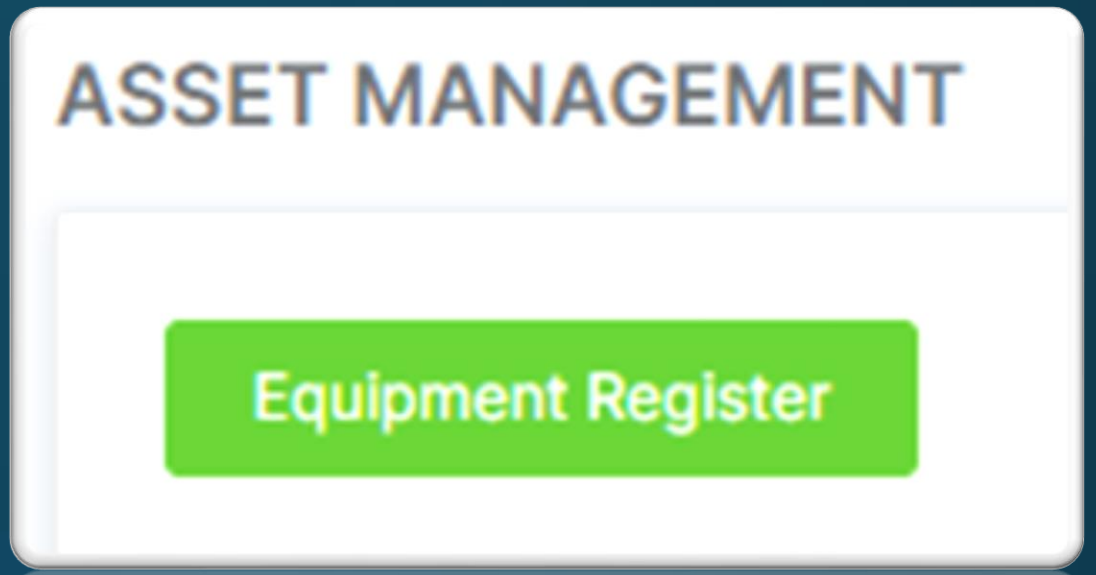


Config > Administration > Rooms

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

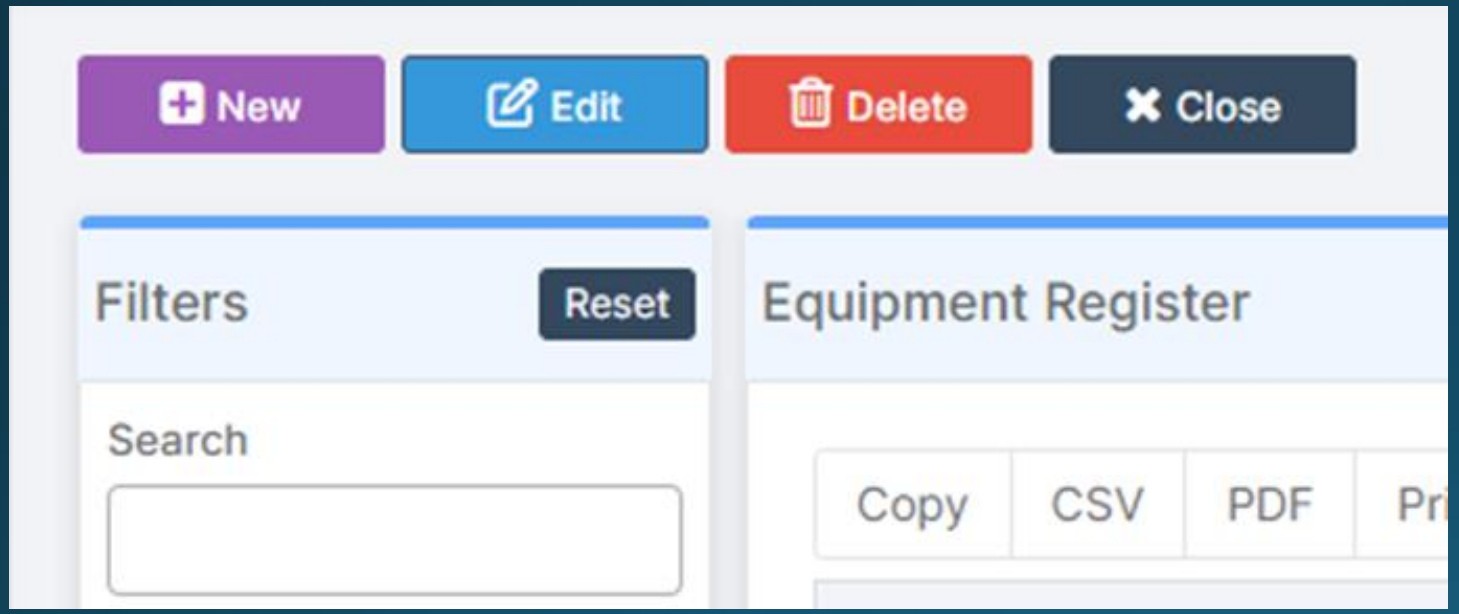


- Only fields with * are required but you can always add additional data later if needed.
- NOTE: The Room Name field has a limit of 10 Characters.
- NOTE Do not add in the site name, if you do then it will not save as it will expect 'Block' to be completed.
- Once you are happy with your Room Details,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

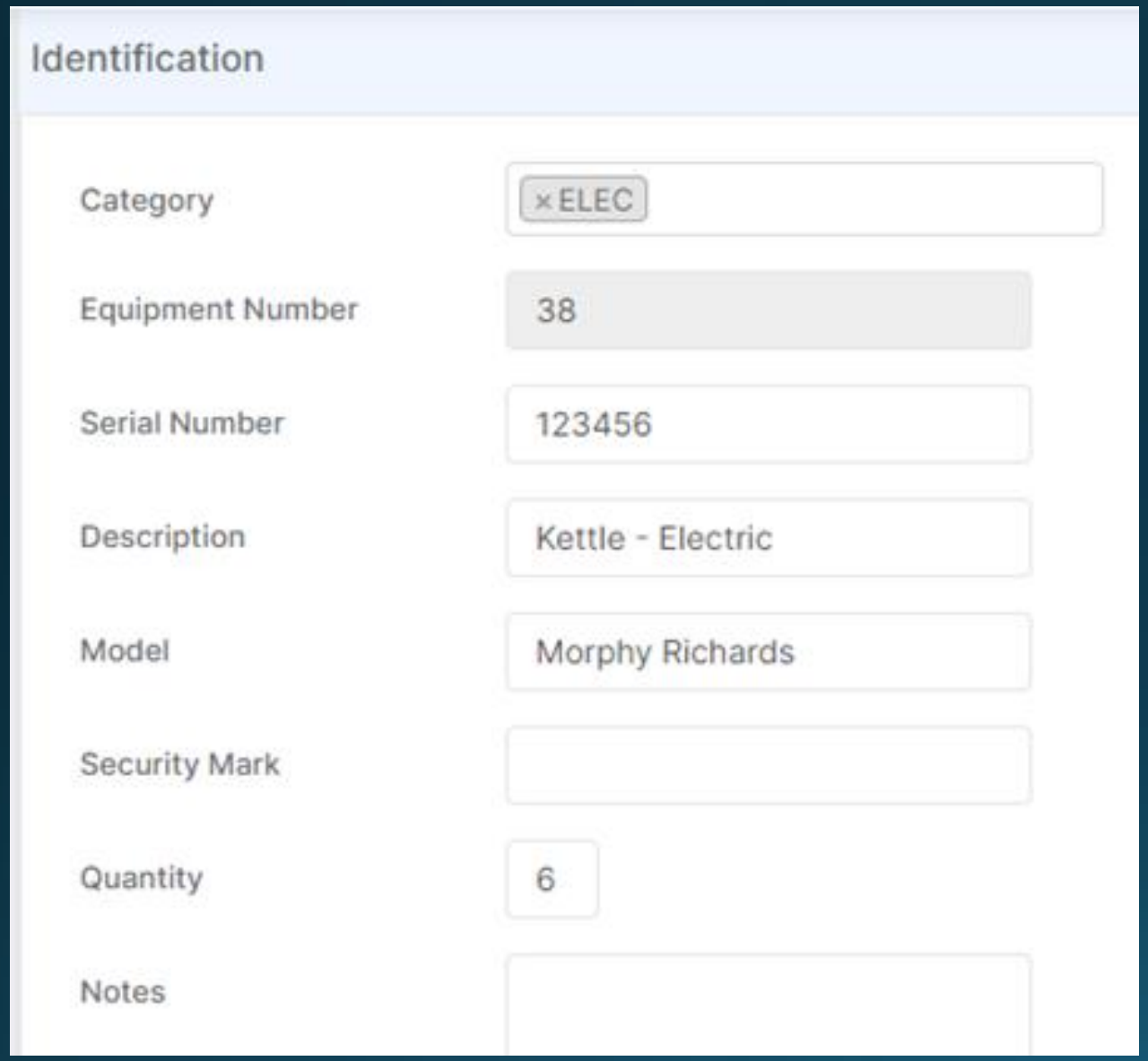


Populating the Register

Finance > Asset Management > Equipment Register

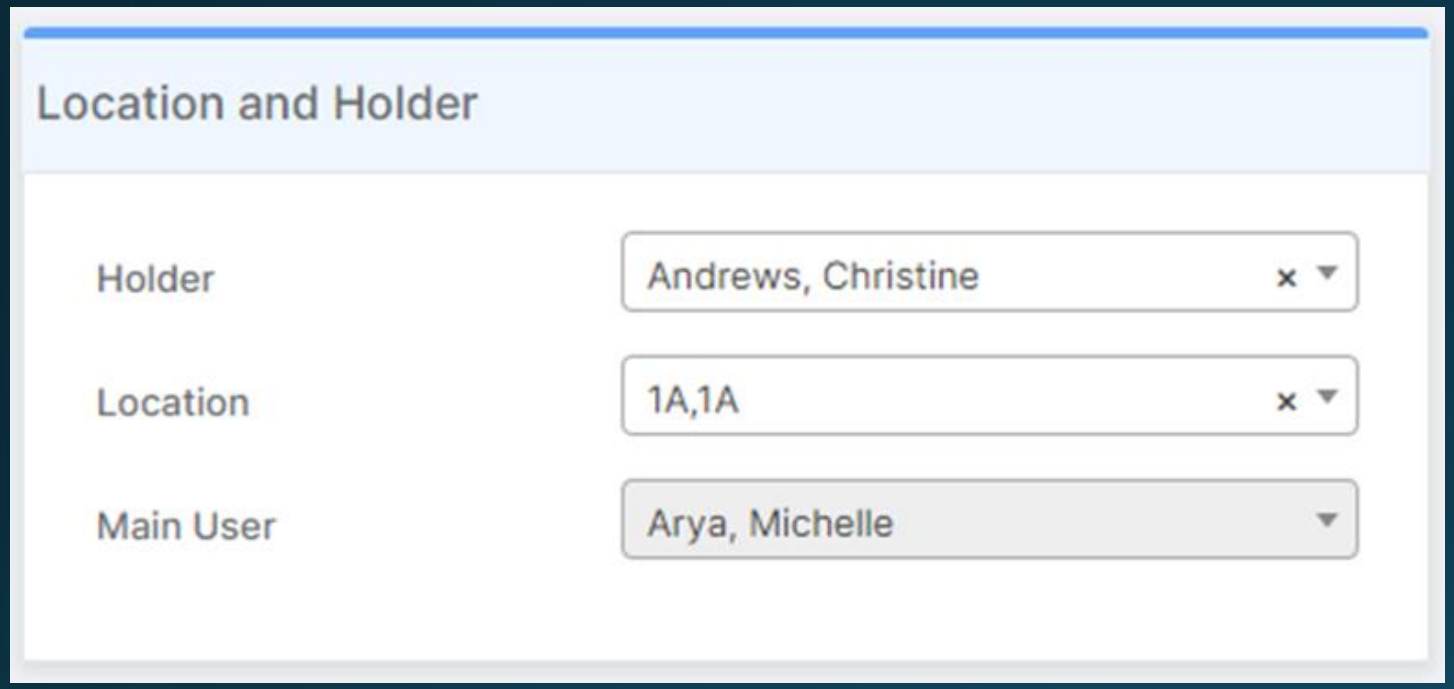


Initially will need to populate manually for historical items, there is no facility at the moment to import from a spreadsheet



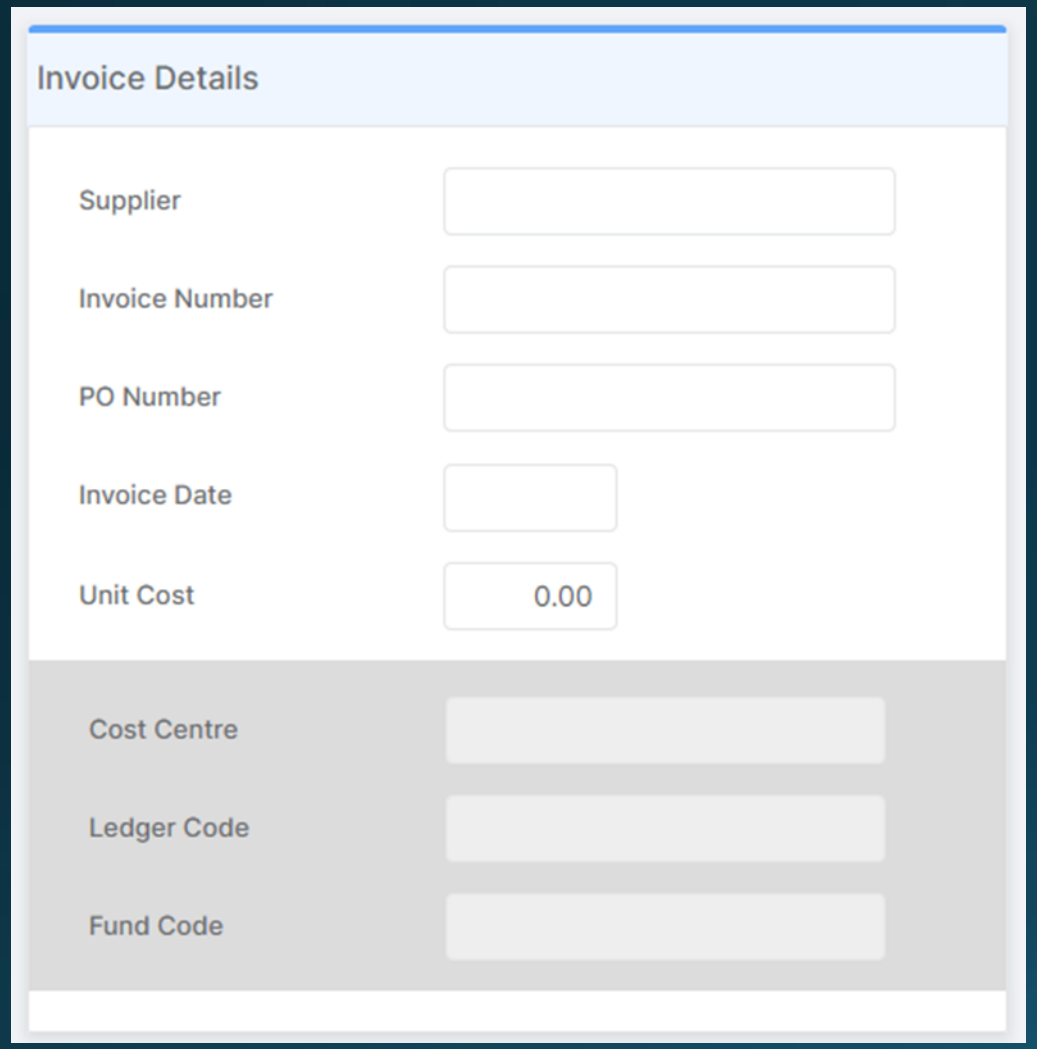
Identification

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



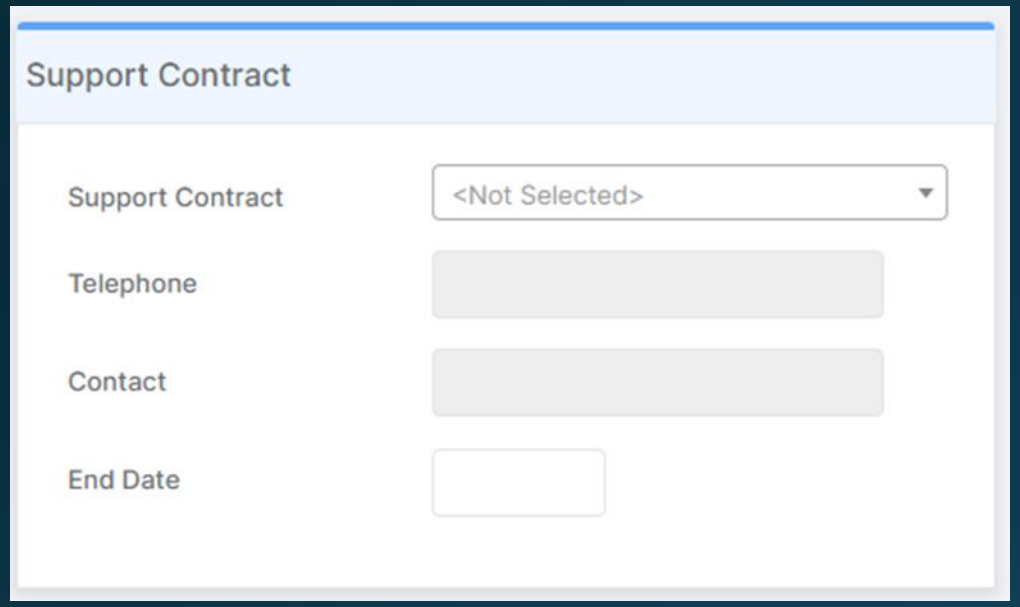
Location and Holder

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



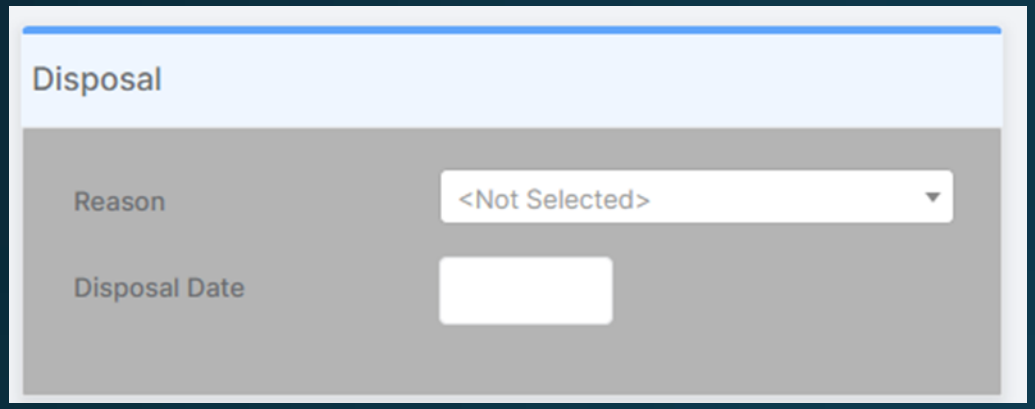
Invoice Details

- 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



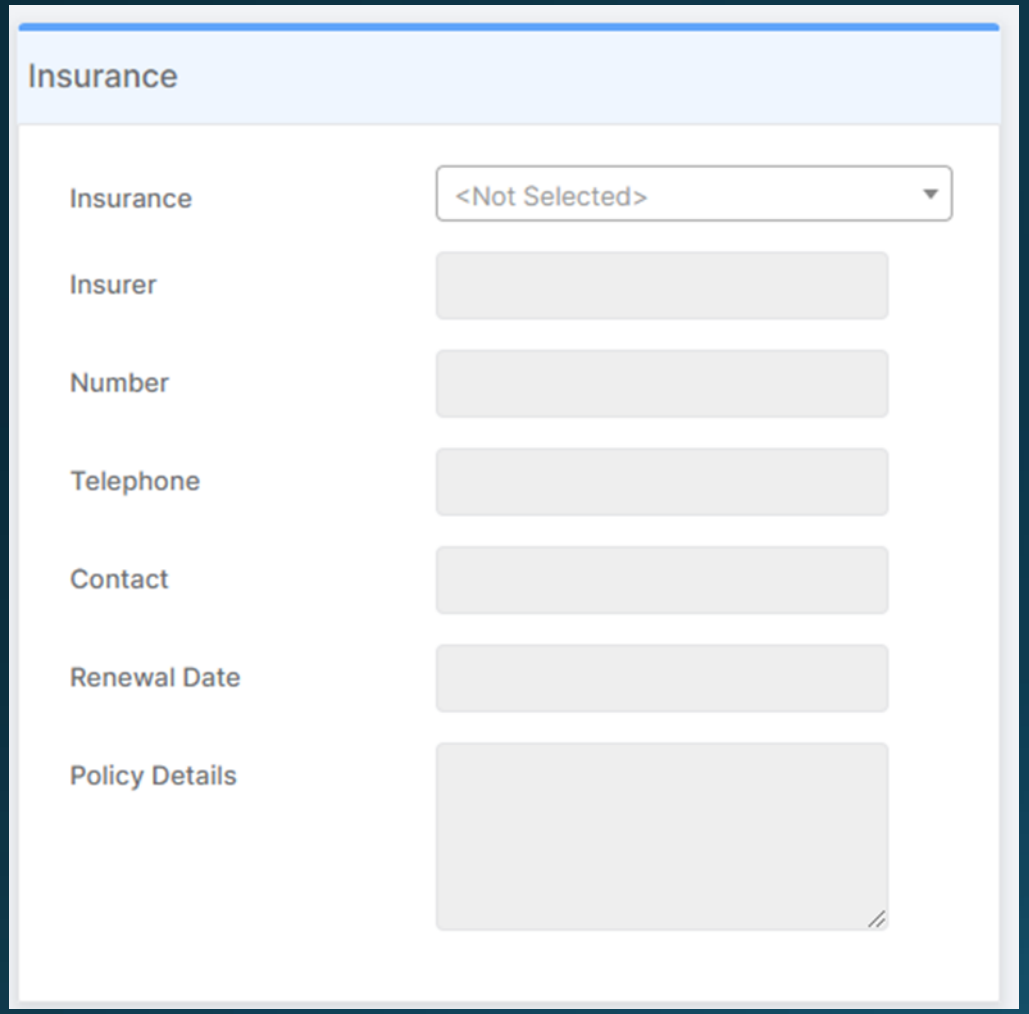
Support Contract

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



Disposal

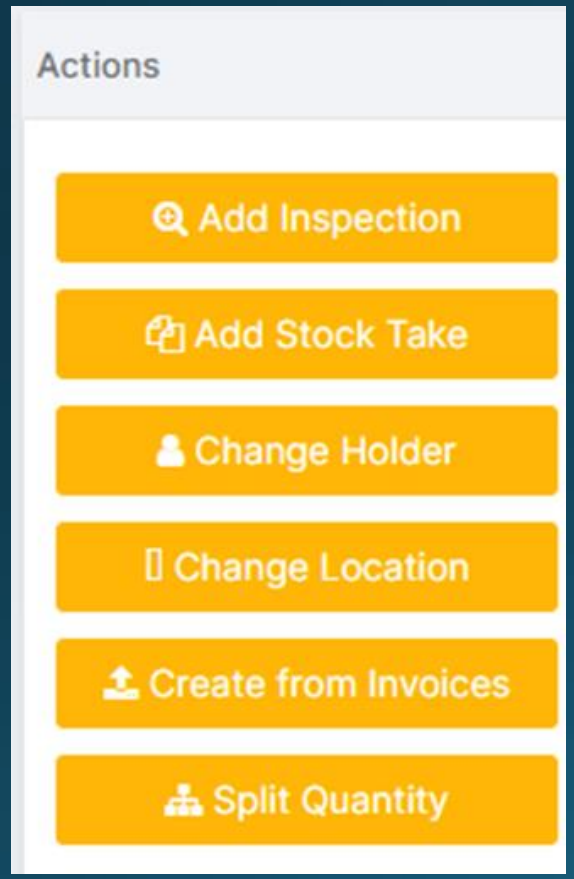
- To be used when an item is disposed of through what ever method.
- Dropdown is populated from the Configuration



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

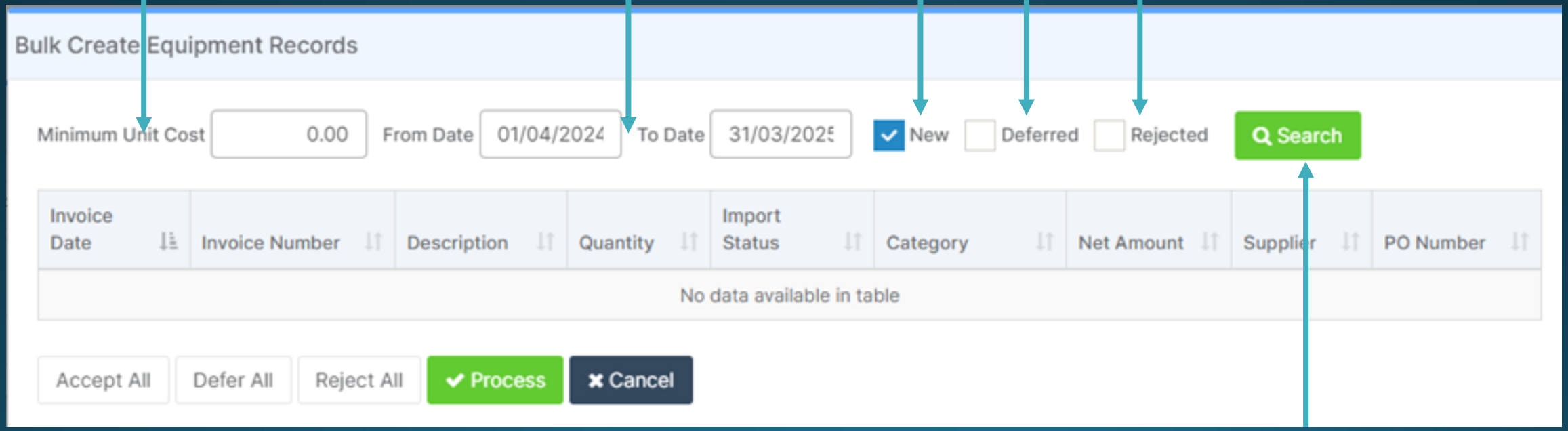
Minimum unit cost – a low figure will avoid pulling through low value items

From Date/To Date – will default to current year

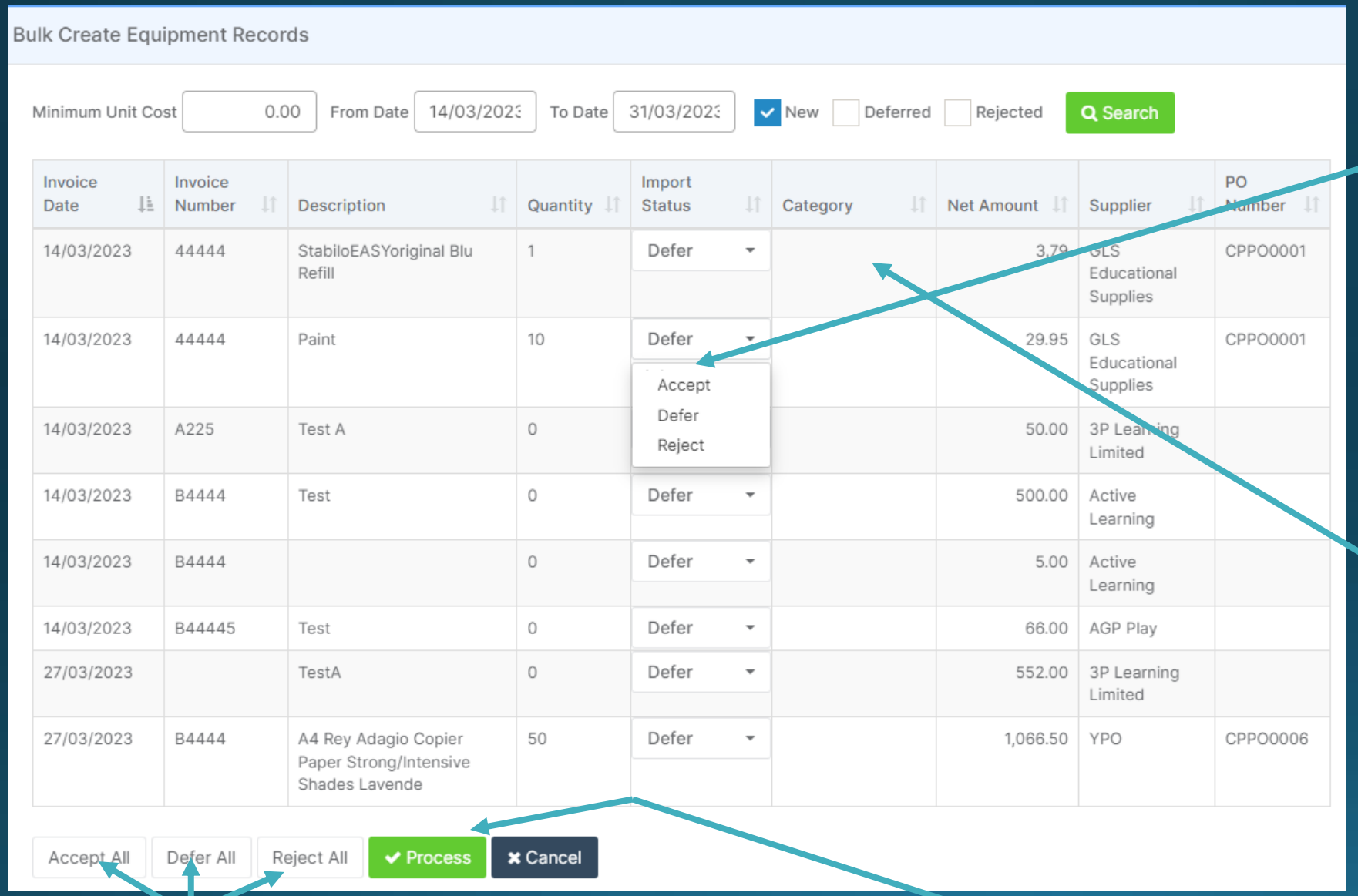
New – shows all new items added

Deferred – shows any previously deferred items

Rejected - shows any previously rejected items



Search to populate

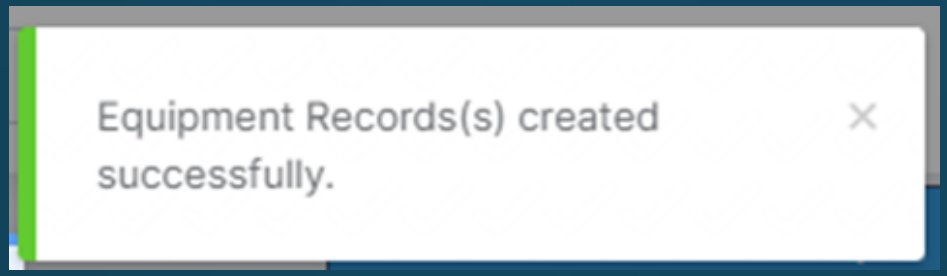


Import Status– select as required
Accept – to add
Defer – to defer to another import
Reject – to reject from the import

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

Accept All/Defer All/ Reject Buttons

When selections complete – Process to import



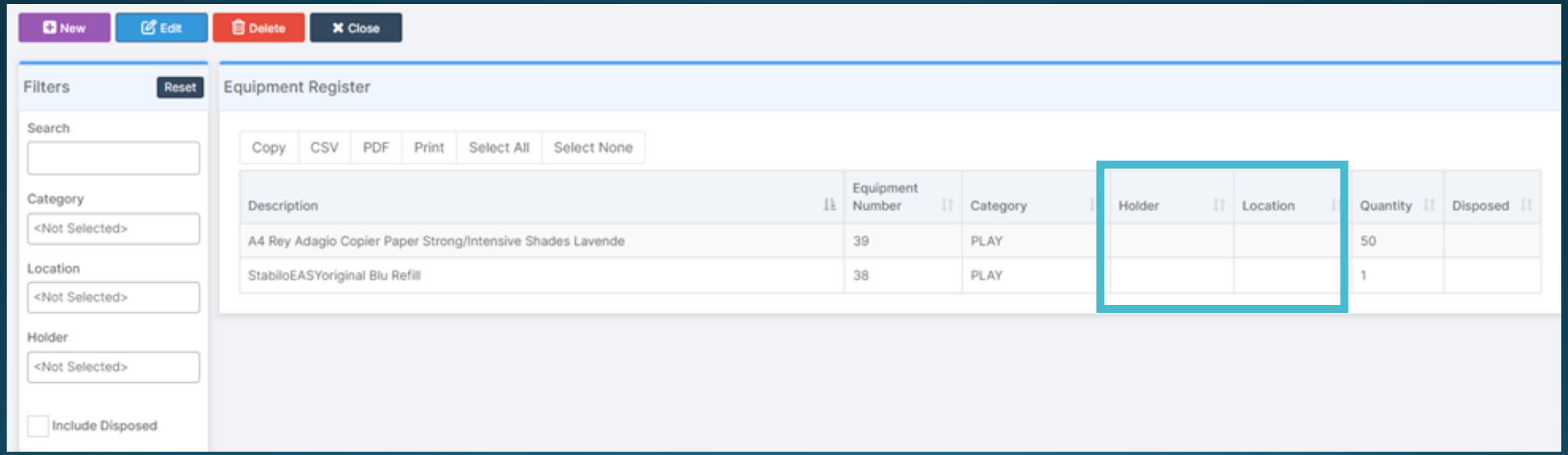
Bulk Create Equipment Records

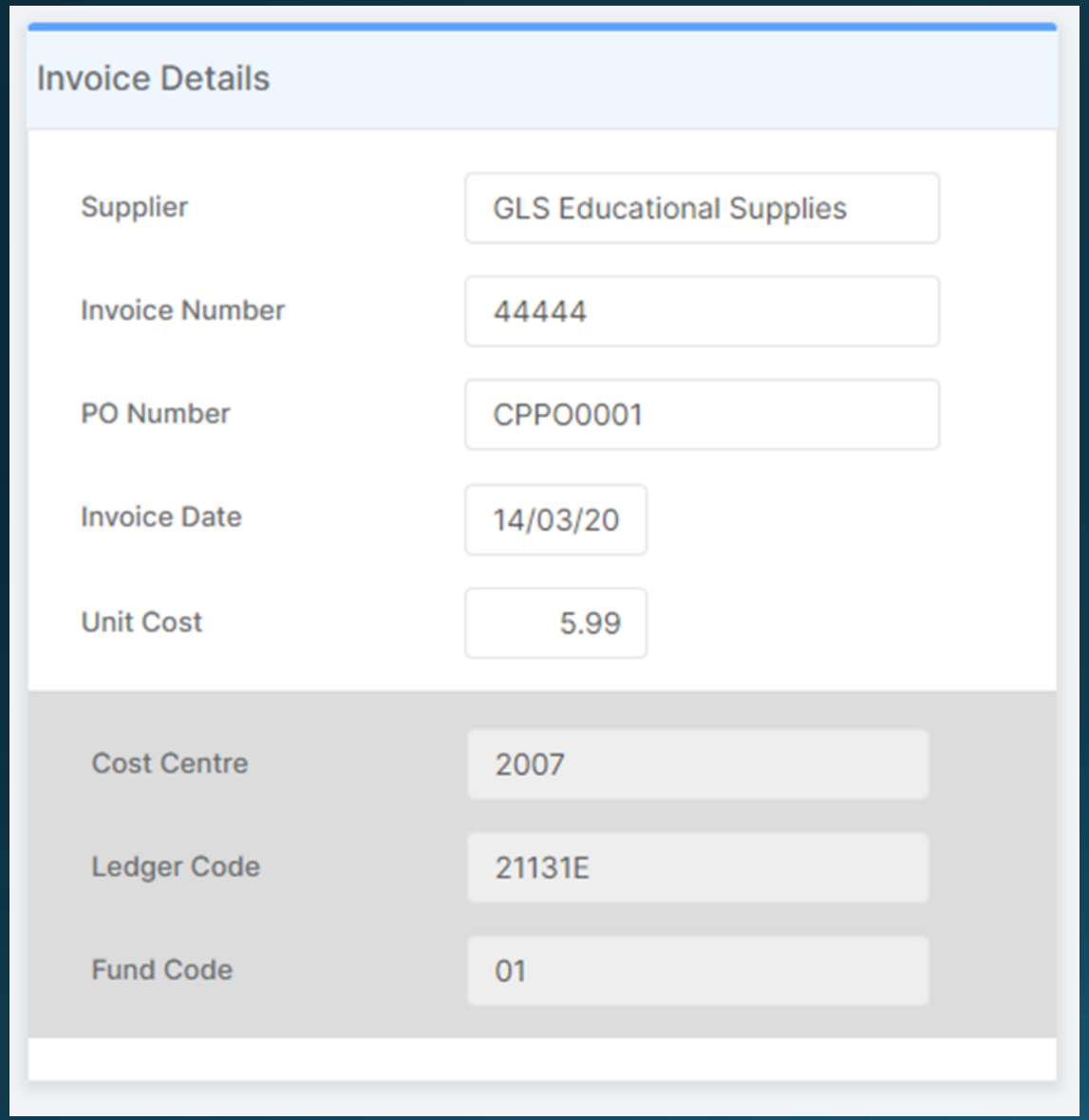
Description	Equipment Number	Category	Quantity
Paint	39	PLAY	10

✖ Close

Imported Items

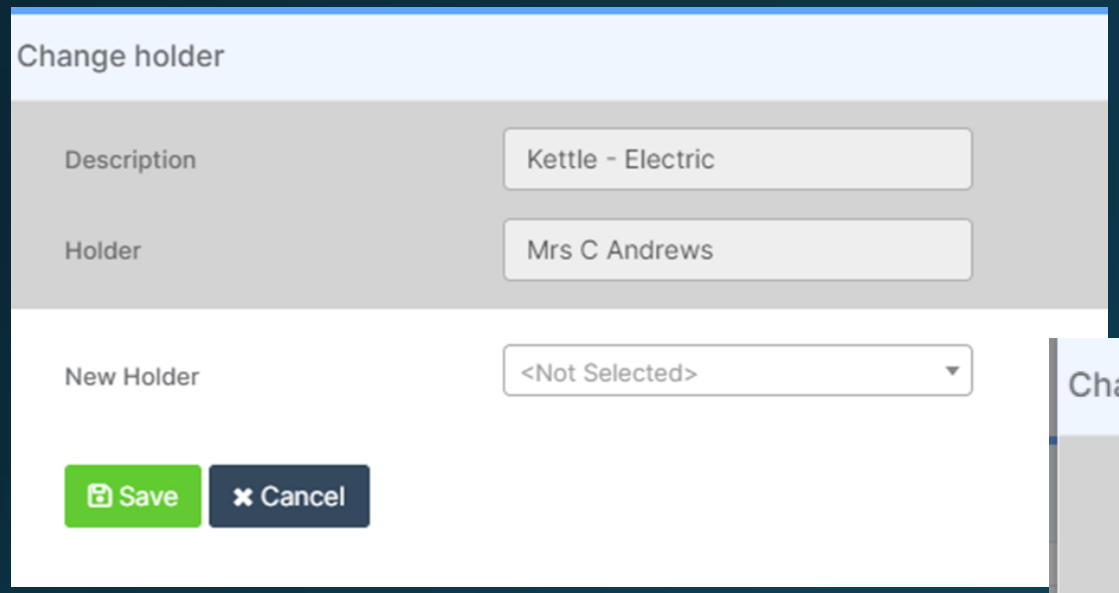
No Holder or Location – highlight and click Edit to add in

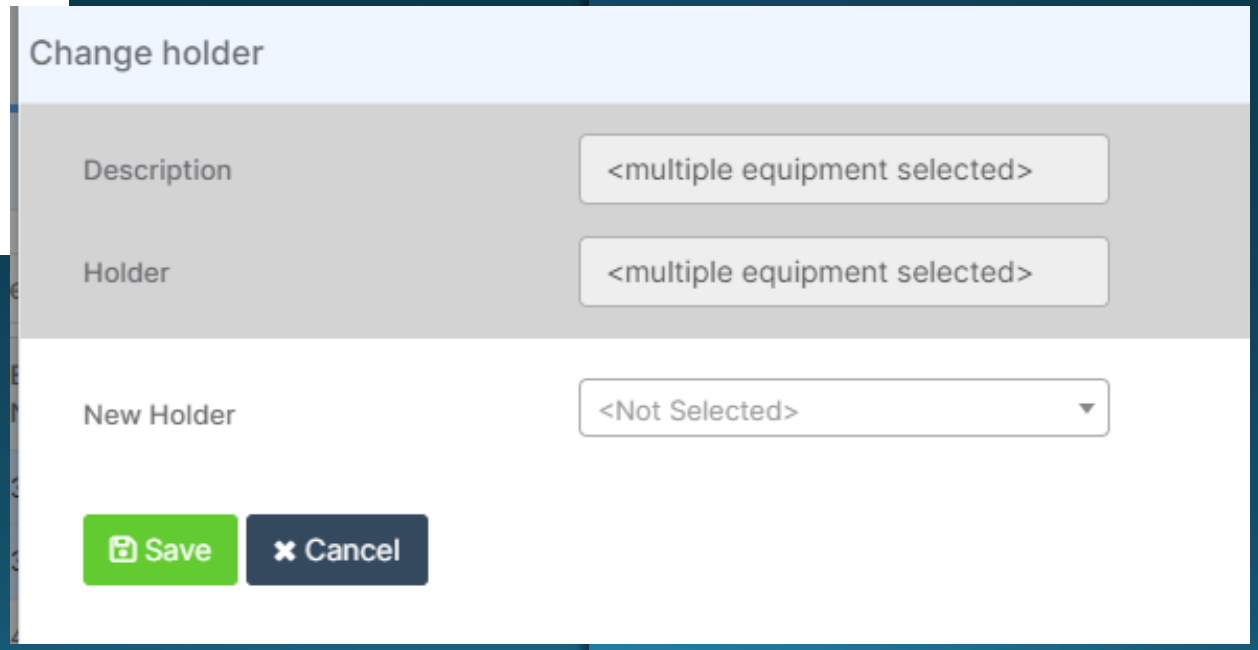




- Invoice details are completed

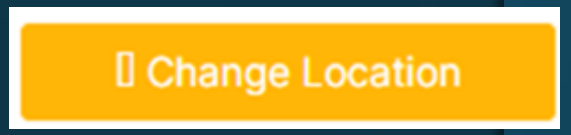
Change Holder

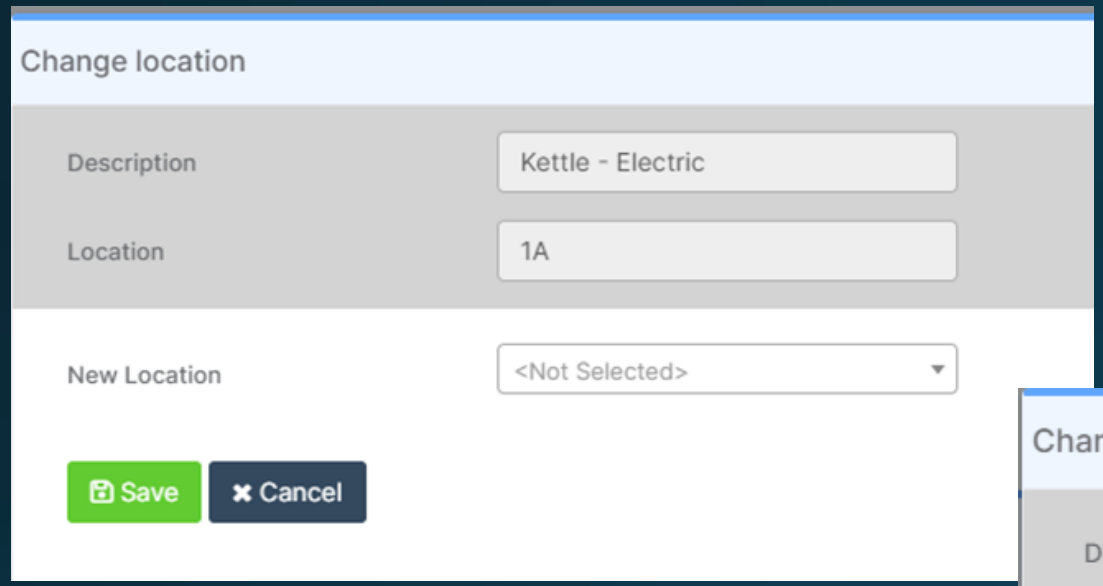




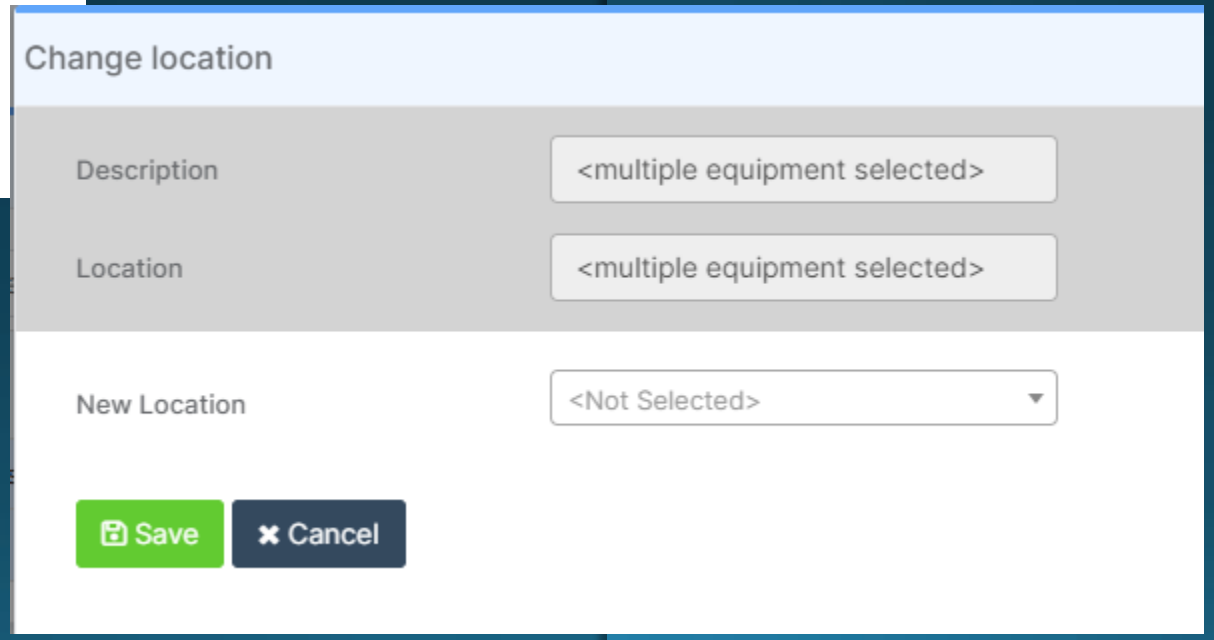
- Can highlight more than one item and bulk change
- Useful if staff have left

Change Location

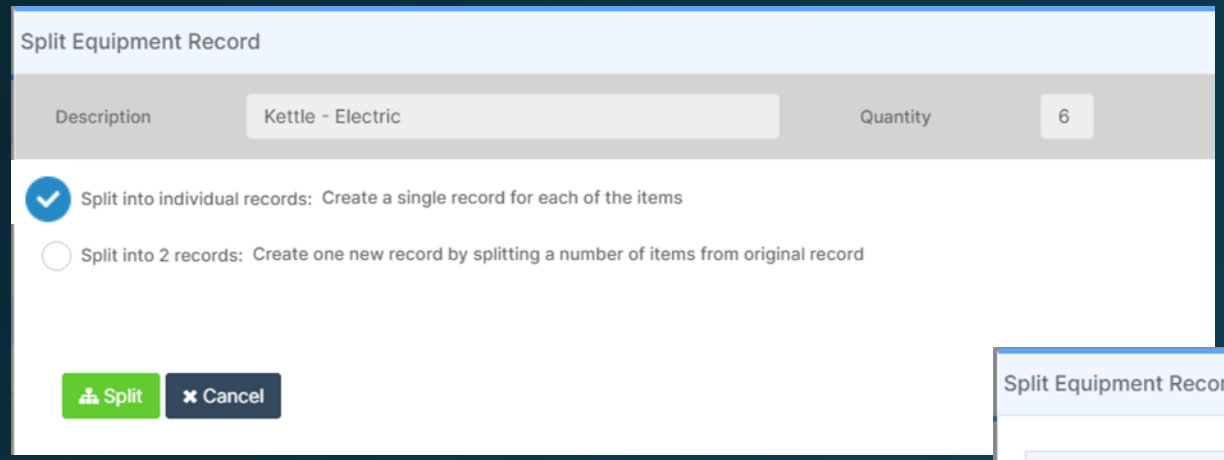




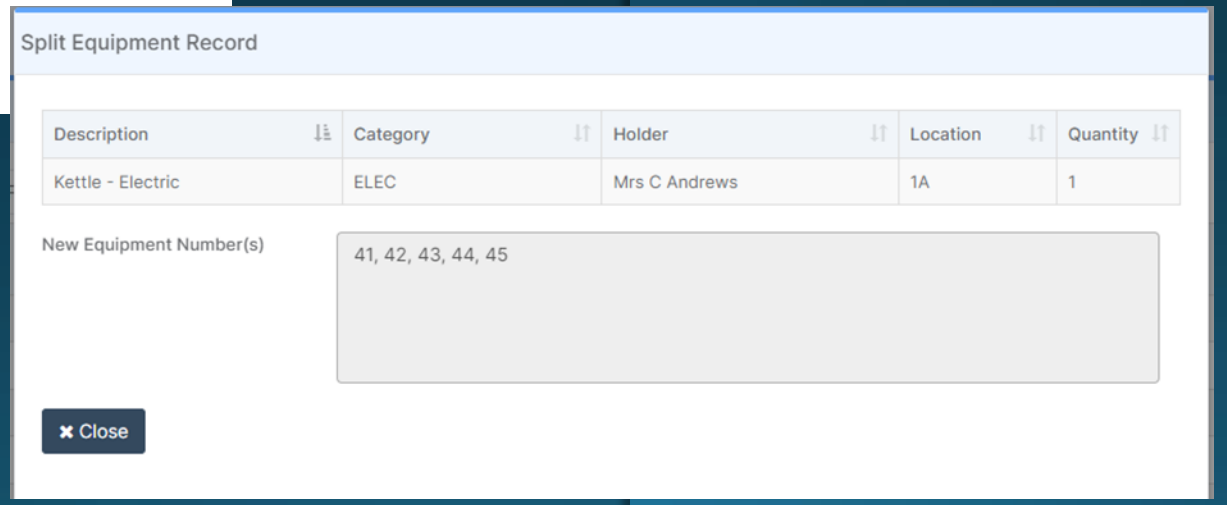
- Can highlight more than one item and bulk change
- Useful if staff have moved round



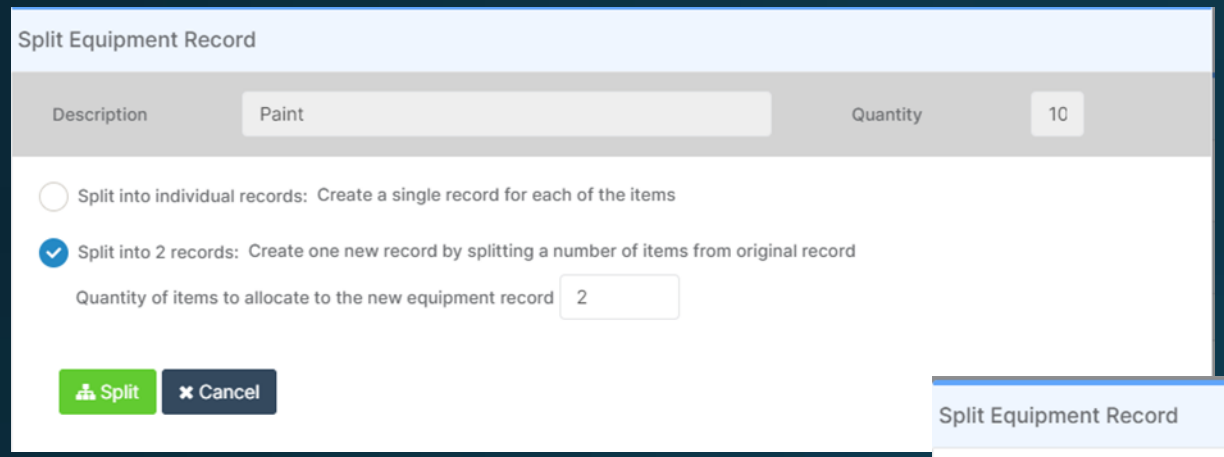
Split Quantity

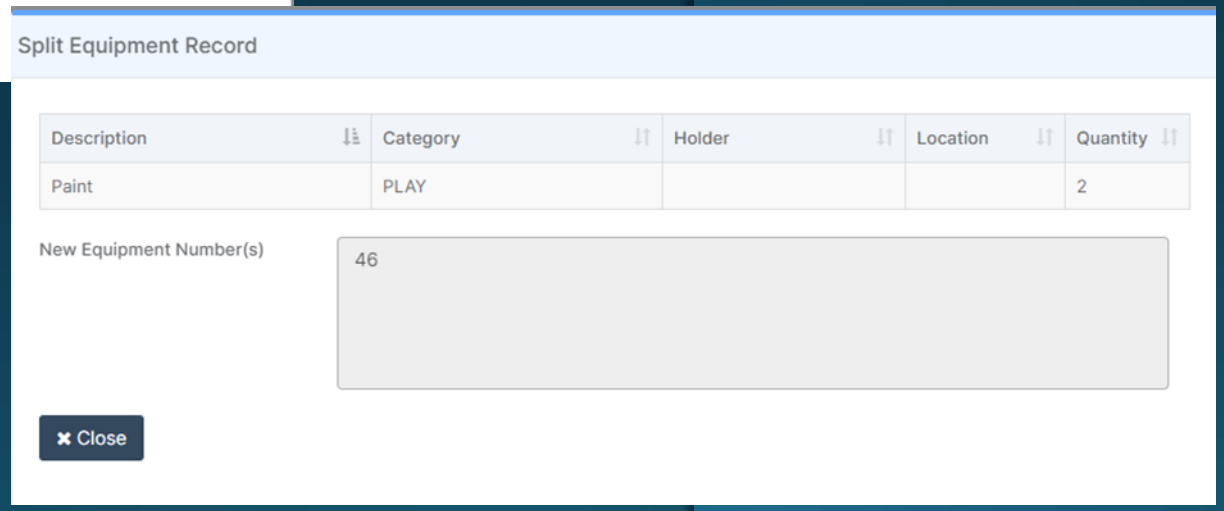


Individual Records



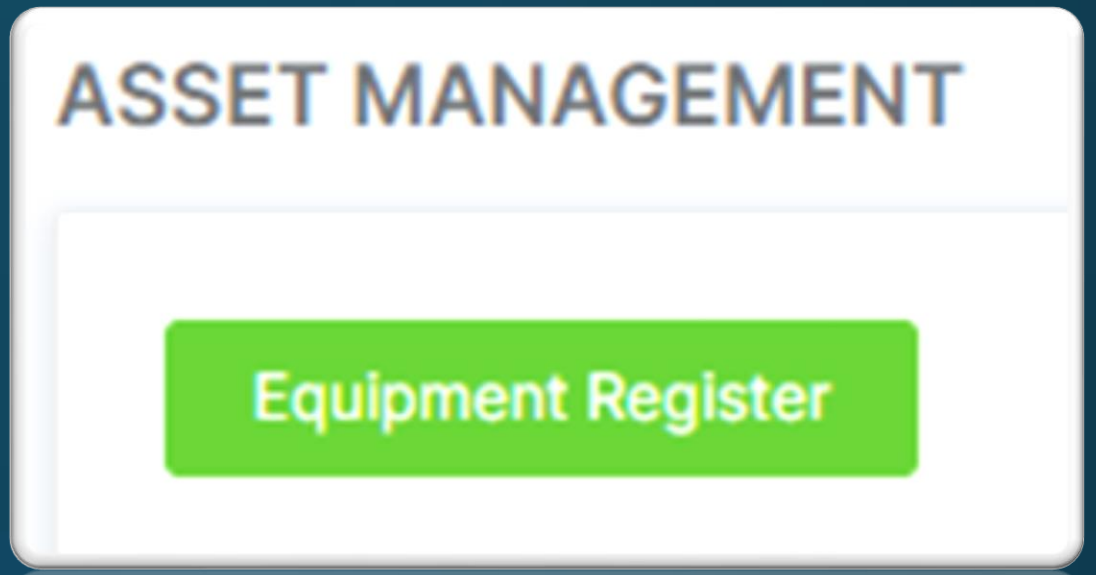
Split Quantity





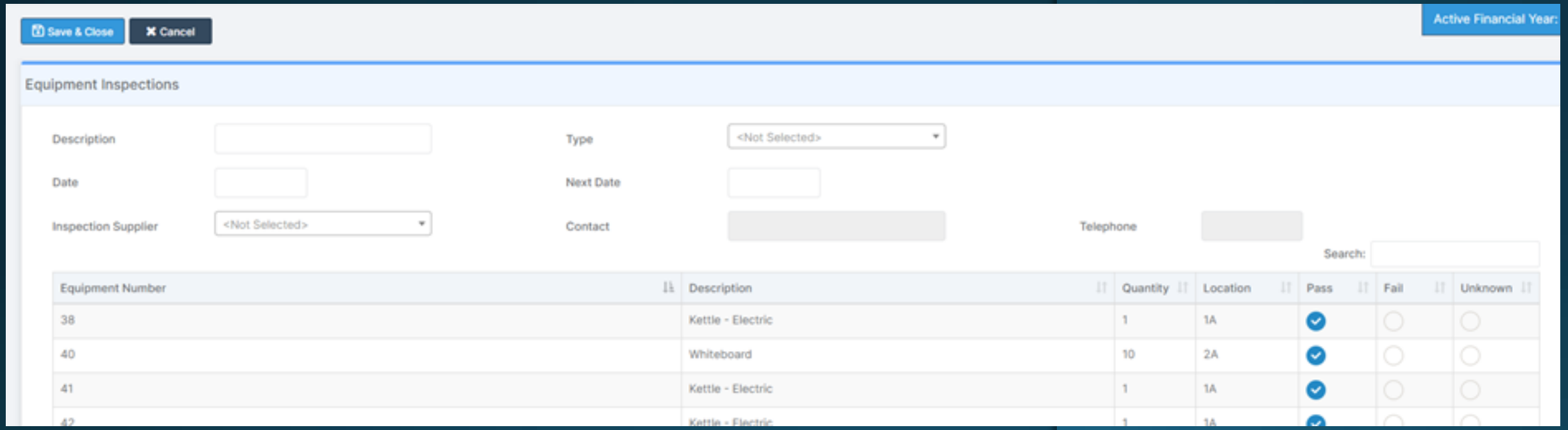
Split into 2 records

Enter the quantity to be split

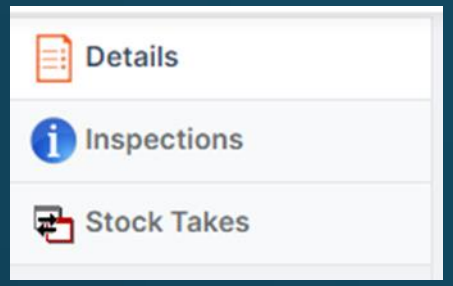


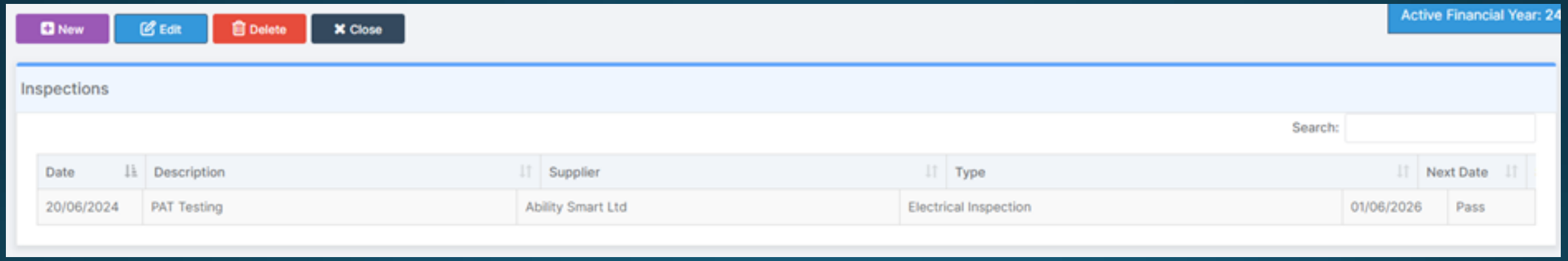
Inspections & Stock Take

Add Inspection

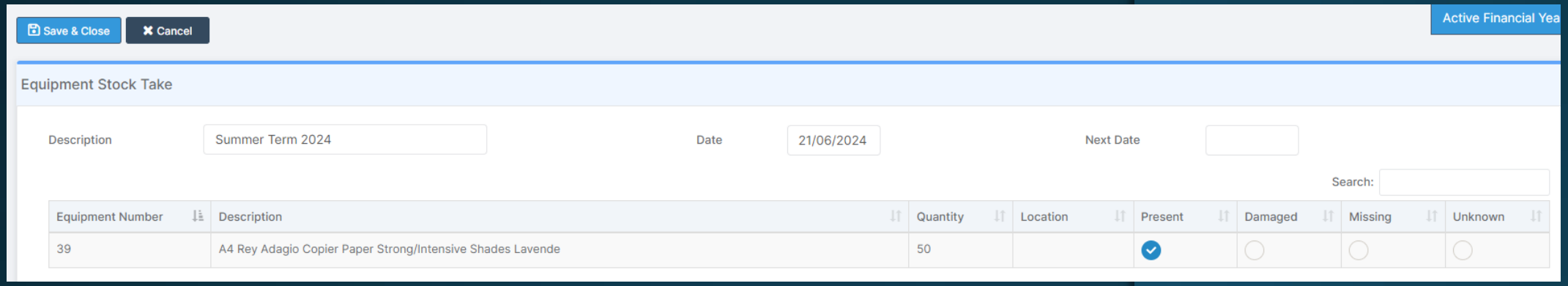


Equipment Details shows the result under Inspections

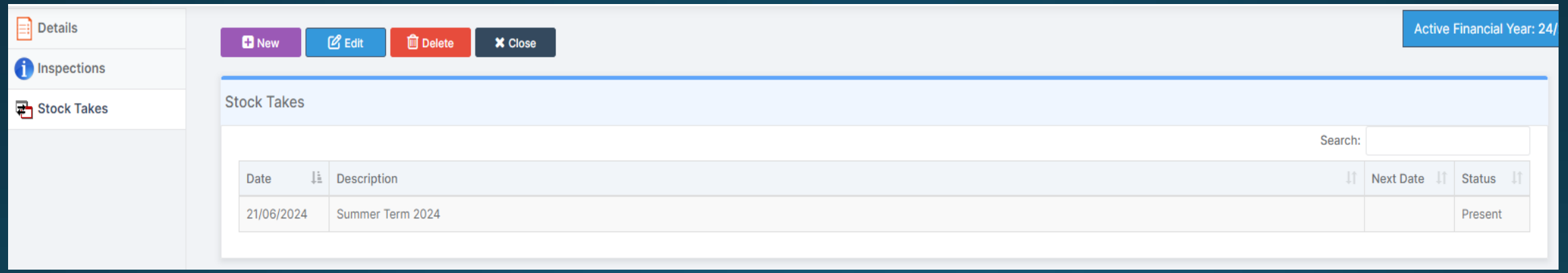


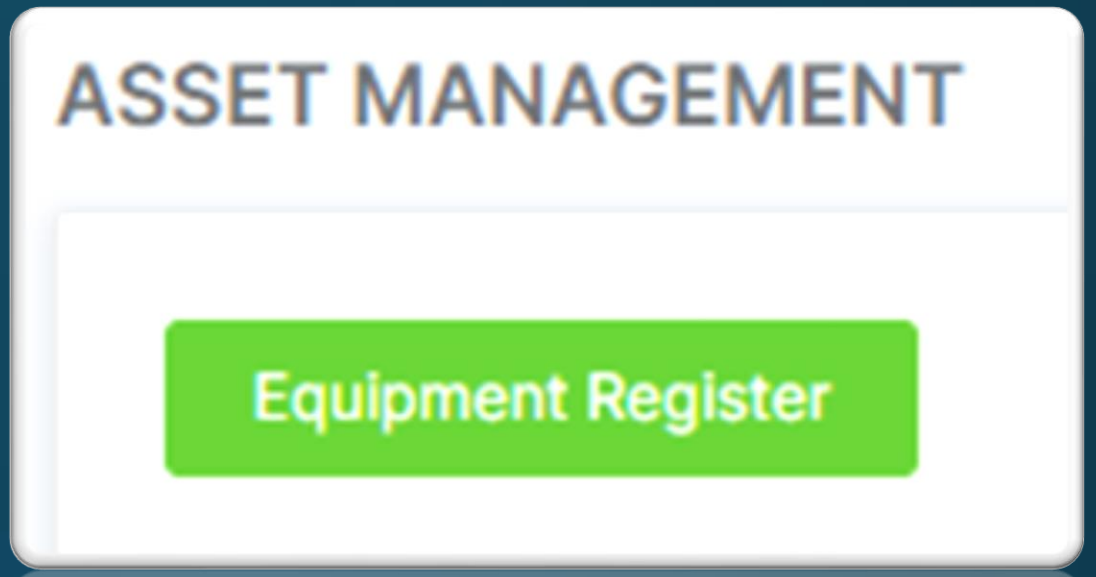


Add Stock Take



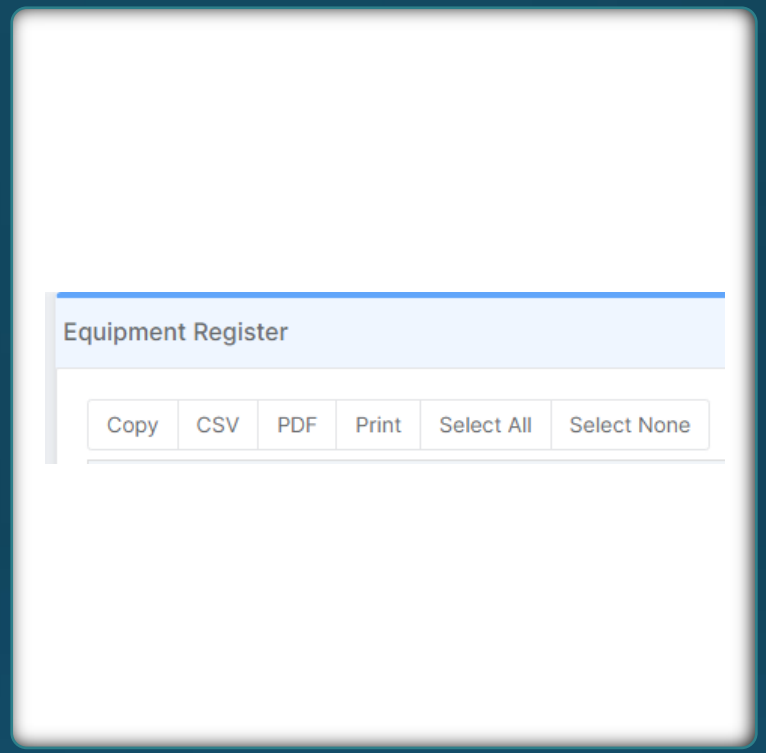
Equipment Details shows the result under Stock Takes

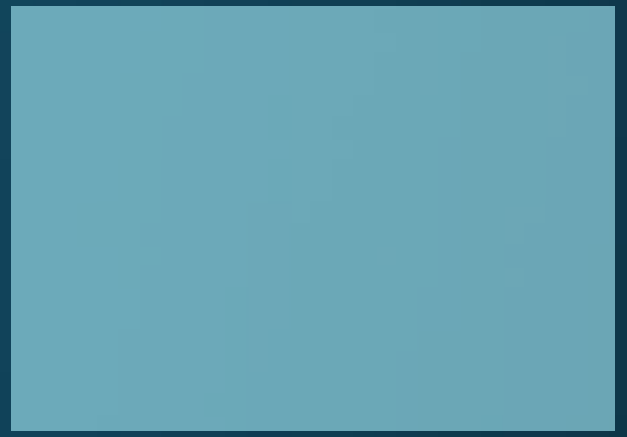


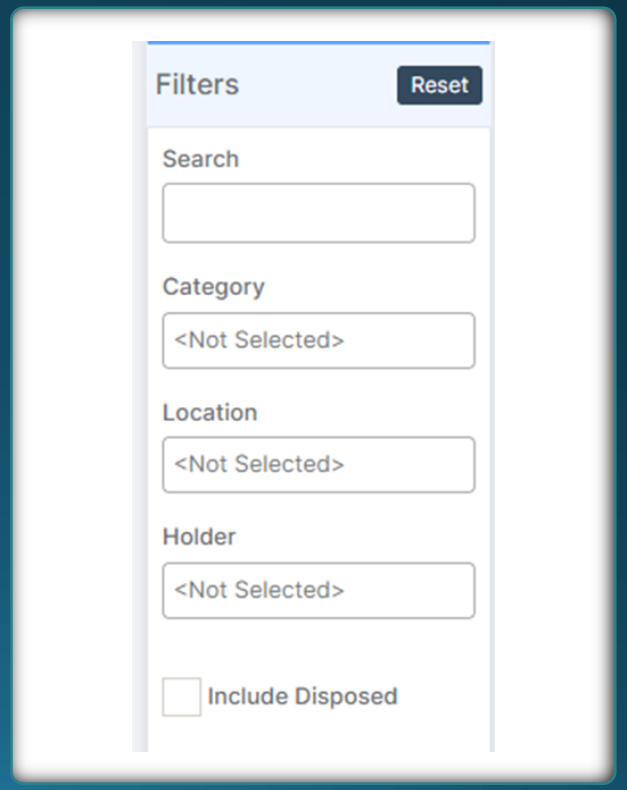


Reporting

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

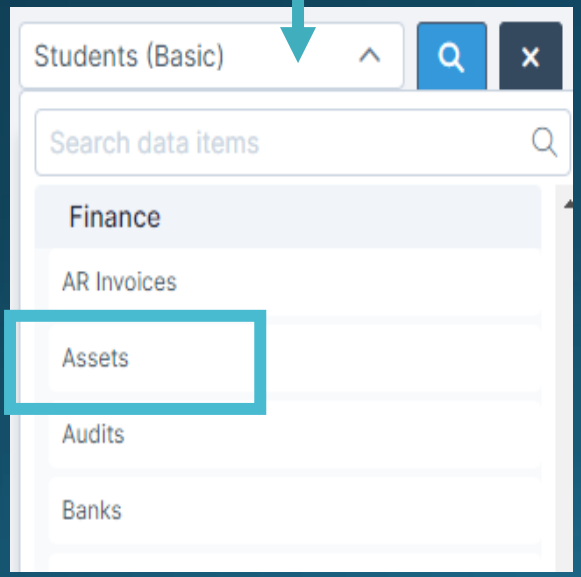


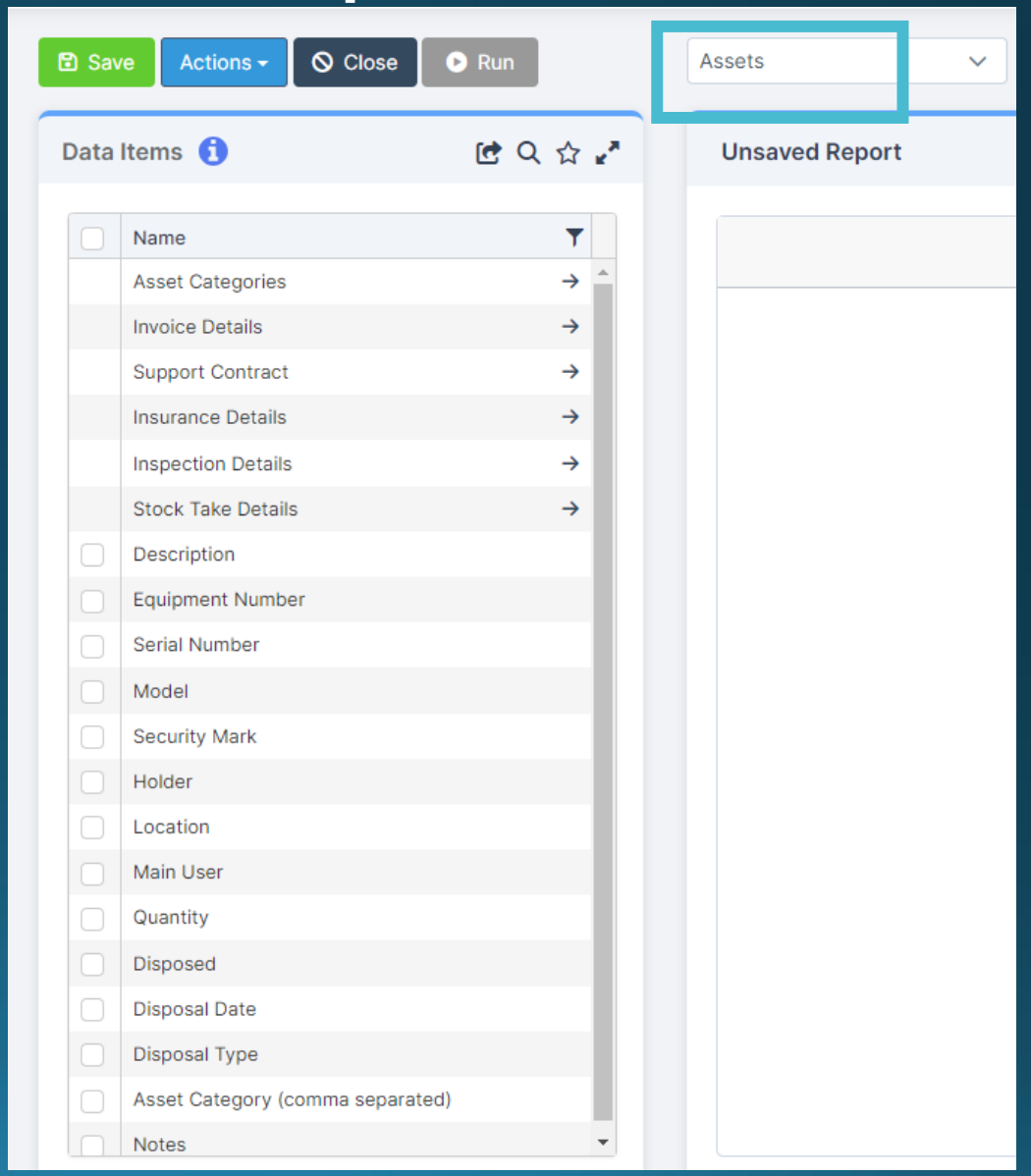




Reports > AdHoc > Quick Report > Create New Report

Select **Finance > Assets**





LET'S LOOK AT THE TRAINING DATA

QUESTIONS

THANKYOU