

# Formbird FLEET - Asset Template Configuration

## Overview

An Asset Template is formatted to collect relevant data for a particular asset type. For example a Chainsaw does not have wheels or vehicle registration whereas a Passenger Vehicle would. Once data is entered on the Asset Template and saved, it becomes the document that holds the data of the asset. This is then the central place in the application to where all other documents related to that asset are linked.

It is important to be aware that there are Asset Group Mapping documents and Asset Tags that work in partnership with the Asset Template. These must also be configured before an asset can be loaded into the application. A number of these are provided pre-configured with a new environment and cover most asset types. However, the application is designed to be highly customisable so new ones can also be configured.

The configuration of Asset Templates, Asset Group Mappings and Asset Tags is only available to users with the Administrator Formbird App Role. Before modifying existing Asset Templates, mapping documents and Asset Tags, or creating new ones, the user must consider the implications. Any changes on existing Asset Templates and mappings documents may have an impact on existing assets already loaded in Formbird based on that Asset Template.

## Asset Group Mapping

An Asset Group Mapping document is used by the application to filter and present various data when working with an asset. The mapping document is referred to by the application when presenting:

- the request types in the dropdown on the asset.
- the work order types in the dropdown on the request.
- the repair types in the dropdown on the work order.
- the data in the daily driver checklist.
- data in the component types list on the asset.

For example, an Asset Template for Mobile Toilets may not have a relationship with a New Infringement Request, a PM Service Work Order, Engine repair type or Reversing alarm daily driver check. On the other hand, these would probably be desired for a Passenger Vehicle Asset Template.

## Asset Tags

Asset Tags are available for configuration to provide additional information about an Asset. These tags can fall into two types: bodyType and assetCategoryType which are selectable on an Asset Template under the Body Type and Asset Category fields, respectively.

## Creating a new Asset Template

Before creating a new Asset Template, first consider whether the asset fits into an existing Asset Template and whether the additional time configuring a new Asset Template, mapping document and Asset Tags is worthwhile.

To create a new Asset Template, select Template Creator / Updater from the Configuration dropdown menu on the homepage. This page enables the user to view/update/delete existing user-created Templates, as well as creating new Templates. Alongside Asset Templates, this page also enables users to create Asset Components, Work Orders and Work Order Questionnaires.

A number of fields are pre-configured on any Asset Template. The template creator enables you to create a new component template with custom fields placed in the 'Physical Details' panel.

1. Enter a Name for the template in the 'Name' field.
2. Type in the 'Label' which will appear in the panel.
3. Select the type of formbird component from the dropdown list.
4. The 'field name' field is automatically populated using the label, and in some cases an appendage (eg. 'Num' to indicate a numeric field). This field may be changed to ensure consistency of data across multiple forms. For example, if recording the cubic meter capacity of an item, use 'capacityNum' as the name across all templates. **Field Names MUST BE UNIQUE for the template.** The following field names are already present on the template as do not use these field names:
  - a. make
  - b. model
  - c. serialNo
  - d. bodyType
  - e. assetTypeCategoryRel
  - f. appTags
  - g. panelStyle
  - h. panel1RM
  - i. parentId
  - j. assetComponentName
  - k. htmlSpacer
  - l. purchasePrice
  - m. includeInPurchaseCostBool
  - n. assetComponentDescription
  - o. physicalDetailsPanelAccessory
  - p. componentImagesPanel
  - q. images
  - r. assetComponentType
  - s. moduleTags
  - t. mainContentBackground
5. **An error will be displayed if duplicate field names are encountered.**
6. If drop-down, drop-down-open, check-list or radio-list is selected - enter a comma separated list of items which will be available for selection on the template.
7. REVIEW the data.
8. Click the 'Create Template' button.

The new template will appear in the grid above.

A template may be deleted using the 'delete template' function in the panel below

1. Select the template to be deleted - **IMPORTANT!!!! Make sure NO documents have been created using the template.**
2. Click the 'Delete Selected Template' button.

## Asset Tag Configuration

Navigate to Asset Tag configuration from the homepage by selecting Tag List from the Configuration dropdown menu.

- To modify an existing Tag to include a new Asset Template, click on the purple text in the name column of the table of the tag that is to be modified.
- To create a new tag, click the New Tag button at the top of the panel.

The asset tag appears in two places on the asset - Body Type and Asset Category. Note that It is possible to select multiple tags in either of the Body Type or Asset Category fields.

To configure:

1. Name the tag as per the asset category or body type required.
2. Select the 'type' field where the tag is to appear.
3. Select the asset template(s) in the 'applies to asset' select.
4. Save the changes.

## Configuring an Asset Group Mapping document

Navigate to Asset Group Mappings from the homepage by selecting Asset Group Mappings from the Configuration dropdown menu.

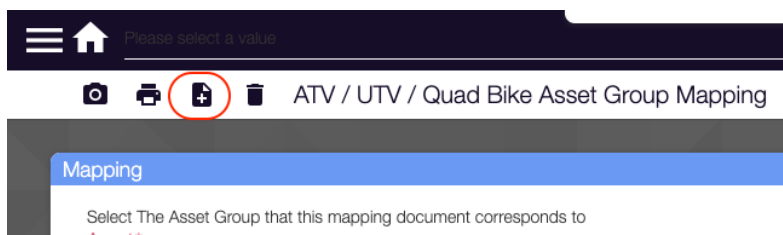
To modify an existing Asset Group Mapping document:

**\*caution this may negatively impact existing assets\***

1. Click on the purple text in the 'Name' column to open the document.
2. Modify the mappings as desired.
3. Save changes.

To create a new Asset Group Mapping document,

1. Click on the purple text in the 'Name' column to open any document.
2. Click on the New Document button in the bar to open a new blank document.



3. Complete the fields as desired. Note: it is recommended to do this while comparing to an existing Asset Group Mapping document for a similar Asset Type.
4. Save the document.

Before a mapping document is created, all of the items potentially linked to the document should be created. These items are supplied with the application, the exception being 'Components' which can be created using the components template listing form 7dbcec00-56b3-11eb-8154-e159cb789a51