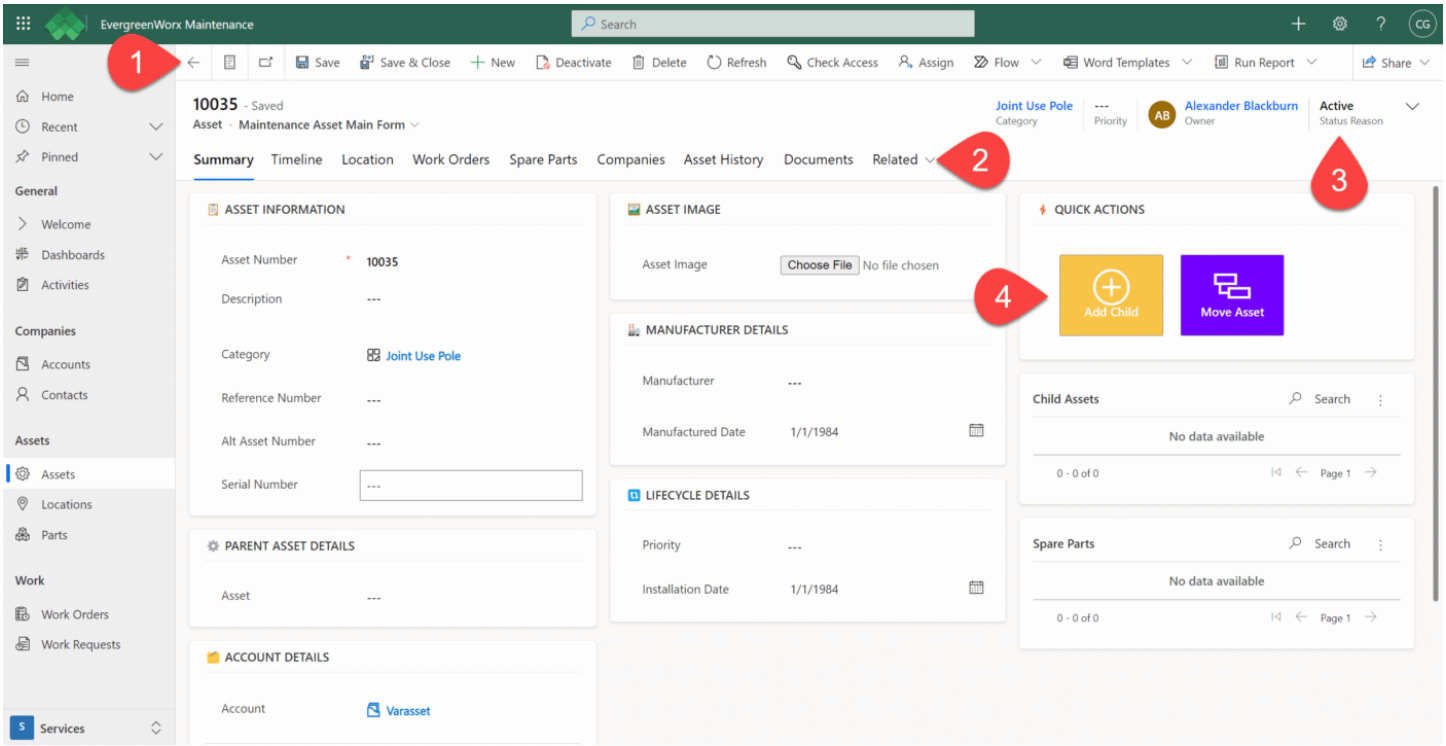
Assets

Maintenance · https://evergreenworx.com/docs/assets/

The main Asset record form is where all key data about a particular Asset is kept, from owner and category characteristics to location and lifecycle information.



1 In the ribbon, available actions are displayed for the current Asset record, such as deactivating the record, deleting the record, or running a report. The actions available depend on your security role and permissions.

2 Record forms have tabs that allow the user to move between different data elements of the record. On the Asset record, you'll see the following tabs:

- Summary – Displays owner and category data, timeline history, and key related records such as Spare Parts.
- Timeline - Stores historical notes and activities against the record. For more information, see Timeline | EvergreenWorx.

- Location – Address and Map, if a Latitude and Longitude is provided.
- Work Orders – Types of work that have been scheduled or completed on the Asset. New Work Orders for this Asset can be created from this grid using the + New Work Order button. For more information, see Work Orders | EvergreenWorx.
- Spare Parts – Replacement parts that are available for an Asset. Additional Spare Parts for this Asset can be created from this grid using the + Add Existing Part button. For more information, see Parts | EvergreenWorx.
- Companies – Organizations that are owners, manufacturers, or have some other connection to the Asset. New Companies for this Asset can be created from this grid using the + New Asset Company button.
- Asset History – Displays history of the Asset, should the location change over time.
- Documents – File attachments such as documents and photos.
- Related – Other related items, such as Record Audit History and Activities.

3 Status of the record shows whether this Asset is actively in use or inactive due to having been retired.

4 Actions allows certain activities to be performed for the record:

- Add Child – provides the capability of defining Assets in a “levels” structure, where Assets can have a parent Asset.
- Move Asset – provides the capability of moving an Asset to a different Location, or for moving a child Asset from one Parent Asset to another.