Master Asset Profile: Adding a New Asset

**Shop**

- Start
- Create New Asset Profile
  - Type: SERIALIZED
  - Status: APPROVAL
  - Add ASSET GROUP
- Add Attributes, UDFs to Asset
- Schedule PM?
  - Yes
    - Add Note about Schedule to Asset
      - Note Type: SCHEDULE
    - Change Asset Status to SCHEDULE
  - No
- Install Asset
  - Status: INSTALLED
- Using WorkDesk Query
  - find Assets to review
    - Type: SERIALIZE
    - Status: APPROVAL
- New Asset!

**PM Manager**

- Using WorkDesk Query
  - find Assets
    - Type: SERIALIZE
    - Status: APPROVAL
- Install Asset
  - Status: INSTALLED
- Using WorkDesk Query
  - find Assets
    - Type: SERIALIZE
    - Status: INSTALLED
- Schedule

**Notes**

- Add Attributes, UDFs to Asset
- Add Note about Schedule to Asset
- Change Asset Status to SCHEDULE
- New Asset!
Asset Management

Master Asset Profile: Inactivating Asset

Shop

- Inactivate
  - All Work Orders referencing the Asset must be in Work Order status = CLOSED
  - Add a Note to Asset, Note Type: INACTIVATE
  - Request Asset Inactivated Status: INACTIVATE

PM Manager

- WorkDesk Query finds Asset in Status: INACTIVATE
  - Review INACTIVATE Note
  - Inactivate Asset Status: INACTIVE
  - END

Note

For Work Orders to move to status = CLOSED all phases have to be either in phase status = WORK COMPLETE or CANCEL.
Then the billing process occurs, which will automatically move the Work Order and Phase Status to CLOSED
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Master Asset Profile: Adding, Changing or Removing an Asset from Preventive Maintenance Schedule

**PM Manager**
- Schedule Asset
- Using WorkDesk Query find Assets to be scheduled. Type: SERIALIZED Status: SCHEDULE
- Add/Create PM Template
- Move Asset Status to INSTALLED
- Finish

**Shop (Change or Remove Schedule)**
- PM Schedule Change or Remove?
  - Yes
    - Add Note about Schedule to Asset: Note Type: BBPM SCHEDULE
  - No
    - Is it Asset Based PM?
      - Yes
        - Request Change. Status: SCHEDULE
      - No
        - Add Note about Schedule to Asset: Note Type: SCHEDULE

**PM Manager**
- Using WorkDesk Query find Assets to be scheduled. Type: SERIALIZED Status: SCHEDULE
- Change or Remove schedule in PM Template
- Move Asset Status to INSTALLED
- Finish