



Manage Assets

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Category

Categories and subcategories are customized classifications for your assets. Add categories from the **Categories** tab in the left navigation pane. You can use Categories to group and classify your assets like wheelchairs, IV pumps, forklifts, carts, and so on.

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- Step 1** From the left navigation pane, click **Categories** and then **Add** in the main area of Asset Locator.
 - Step 2** In the **Category** dialog box click **General**, enter the name and select a **Department**. You can also configure **Subcategories** here.
 - Step 3** (Optional) Add custom asset field for the category and click **Save**.
 - Step 4** (Optional) Click **Upload Picture** tab and click the **Click to Upload** button, and browse for an image. Note that all assets that are assigned to the category are also assigned the same picture as an icon.
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Departments

Adding Departments (and categories) are a prerequisite step to adding your assets manually, one after the other, to the Asset Locator.

Add departments using the **Configure > Departments** tab in the left-navigation pane. Departments can be created according to the team that owns the assets. Department is a mandatory configuration. Examples of departments are Sales, Finance, Kitchen, Human Resources (HR), Foundry, OR, and ICU.

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- Step 1** From the left navigation pane, click **Configure > Departments** and then **Add** in the main area of Asset Locator.
 - Step 2** In the **Name** field, enter a name for the department along with other information, and click **Save**.
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Creating Assets Manually

From **Configure > Assets**, you can add your assets to the Asset Locator either individually or in bulk, using an asset upload CSV file. If you prefer to upload your assets in bulk, refer to [Uploading Assets in Bulk, on page 3](#).



Note Department and Category must be configured in Asset Locator before assets can be manually added.

Adding Assets Individually

This task shows how to add assets individually. Note that, you must configure Categories and Departments before adding assets individually.

Step 1 Click **Add** to add assets individually. In the **Asset** Dialog box, enter the Asset details, select department, category and assign a tag. By default, the State of an asset is Active. Select Inactive only if the asset need not be tracked. For static assets (no location information being received), you can manually add the location under the **Static Location** tab. You can add an icon for the asset by clicking the **Upload Picture** tab. If the asset is assigned to a category which has an icon as well, this icon overrides that icon. You can add enable Telemetry from the **Tags** tab.

Note **Assigned Site** is an optional field defining where the asset belongs to in the region. Assigned Site can be Campus, Building or Floor level as per the uploaded maps. This field is used for the Role Based Access Control to prevent users from seeing assets from sites they are not assigned to. For your assets to be available for a particular site, the assets must be configured with the proper assigned site.

Step 2 Verify that your assets were added successfully by navigating to the asset tab on the navigation panel. To view the details of your asset and tag, navigate to the list view under Locator and click on an asset.

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<input type="checkbox"/>	Serial number	Name	Description	Actions
<input type="checkbox"/>	22-00-00-21	Desk G9-14	Somebody's des	🗑️ ✎
<input type="checkbox"/>	22-00-00-22	Break room microwave	Break room mic	🗑️ ✎
<input type="checkbox"/>	22-00-00-04	3rd floor printer	3rd floor printer	🗑️ ✎
<input type="checkbox"/>	22-00-00-09	Game Room Fridge	Game Room Mill	🗑️ ✎
<input type="checkbox"/>	22-00-00-01	Table B1-18	Common rest ar	🗑️ ✎
<input type="checkbox"/>	22-00-00-02	Desk B3-19	Somebody's des	🗑️ ✎
<input type="checkbox"/>	22-00-00-30	TR 27 Monitor	Monitor in Team	🗑️ ✎
<input type="checkbox"/>	22-00-00-25	Marketing Printer	Printer facing Bl	🗑️ ✎
<input type="checkbox"/>	22-00-00-20	Desk I10-2	Somebody's des	🗑️ ✎
<input type="checkbox"/>	22-00-00-17	Medicines Refrigerator in Zone C	Medicines Refrig	🗑️ ✎

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Step 3 Click **History** to see the details of Asset's location, telemetry, alerts and location on the map.

Uploading Assets in Bulk

Asset upload functionality allows you to upload new assets as well as update existing assets.



Note Asset Locator automatically creates categories and departments if they have not been created previously.

Ensure that the following mandatory fields are included in the Asset Upload CSV file for each asset.

- Serial Number
- Department Name
- Category Name
- Tag Type

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- Step 1** From Asset Locator, click **Configure > Assets > Download Template**. Fill the sample template downloaded and click **Upload**
- Step 2** Verify the status of your asset upload clicking **Upload History**. You can view the status of upload even if the upload was not successful or if the upload process is ongoing. Once the status indicates success, verify if the assets are available on the **Assets** page.
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