Admin Guide –
Asset Manager

March 2024 v1.1

Contents

Introduction

This document describes key steps for successfully setting up Sentral to track assets via Asset Manager. The system is built to handle categories, insurance, registers, asset type, locations, etc. This document describes the top-level configuration of Asset Manager.

A detailed description for the setup of each area in Asset Manager has been provided as well as a checklist of pre-requisites, decisions and recurring tasks that need to be reviewed on a periodic basis.

Some schools that use this module may do so in conjunction with Purchase Orders, Resource Booking and syncing with Xero or their accounting package.

NSW DoE schools that have selected Sentral as their master data source can create new rooms in Sentral and have the rooms pushed up to department's system. They can also view and manage department rooms.

Considerations, dependencies and pre-requisites

This section highlights the key areas that school administration staff need to consider prior to setting up the Sentral Asset Manager module.

Assets

School admin staff need to ensure that assets have been set up in FMS to cater for assets to sync across to Sentral. Schools without FMS can import assets. Staff need to consider what assets will be registered and tracked for stocktake and insurance purposes.

Roles and responsibilities

The Asset Manager module is a powerful module with features and functions that can address the school's management of assets and assist with allocation of budgets and expenditure for new assets that have been written off or damaged. Administration of this module is usually assigned to a select group of staff with access to all the functionality in the module. Schools are responsible for applying access levels for staff that determine the actions they can perform in the module.

- Set role permissions via Setup **⚙ Setup** | Manager User Accounts | Manage Permissions.
- Assess access levels via Setup **⚙ Setup** | Manage User Accounts | Access Levels.

> **ⓘ** **Note:** For details, see the _Sentral Setup Guides_ in the Help Centre.

Define process

Schools needs to define the Asset Manager process and include status, categories and various other aspects according to policy, to sync with their external Accounting package and keep details up to date.

Set up asset manager

Overview

Use the information in this section to configure Asset Manager for your school. Settings that are not explained in this guide can be configured without explanation or configured later.

Access

1. Select the menu icon ⠿ and choose Asset Manager in the Finance group.
2. Select ⚙ Setup and choose Asset Manager Setup.

Import fixed asset upload

Schools can upload a CSV document to import and synchronise current asset data with Sentral Asset Manager. Asset Manager Setup supports importing data from external systems. You can use the generic import spreadsheet template above to import data from other systems.

1. Select the menu icon ⠿ and choose Asset Manager in the Finance group.
2. Select ⚙ Setup and choose Asset Manager Setup.
3. Select Setup and choose Import.
4. (Optional) Use the generic import spreadsheet to import data from an external system.
   The file must be a CSV (Comma Separated Values) file. The name of the file should end with .CSV
   a. Complete all the relevant fields in the file for each asset.
      Ensure the headers in the file remain as specified in the template.
      Below is the list of mandatory fields:
      — ASSET_NUMBER
      — TYPE
      — CATEGORY
      — NAME
      — BRAND
      — MODEL
      — SERIAL_NUMBER
      — DESCRIPTION
      — QUANTITY
      — BUILDING
      — ROOM
      — STAFF
      — ACCOUNT_CODE
      — ACCOUNT_NAME
      — PURCHASE_DATE
      — UNIT_COST
      — STATUS.
      For schools using an FMS, a sync can enable assets to be imported across and this will be denoted within the assets by Status that the source is Xero/Dynamic for example.
   b. Select the file to import and then select Import.
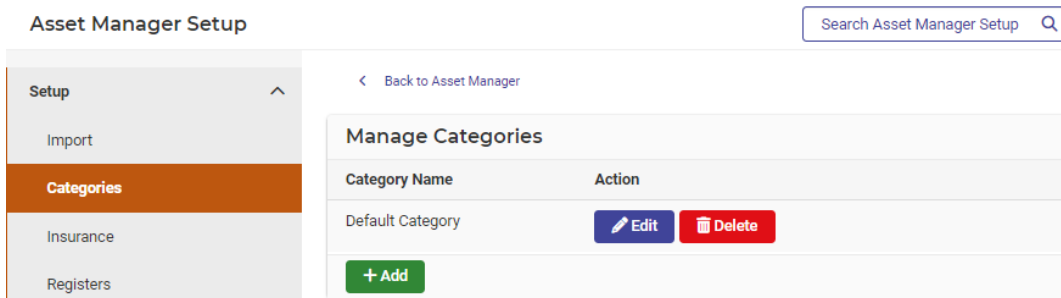
Manage categories

Overview

Categories enable grouping of Assets, like a filing system. For example, Technology and Textbooks could be categories, but this is something that is school specific and is related to asset types.

> *Tip:* Schools may wish to mimic their Purchase Order categories for continuity. For example, Computers, Air Conditioners, resources, iPad, Textbooks.

To manage categories

1. Select the menu icon ⠿ and choose Asset Manager in the Finance group.
2. Select ⚙ Setup and choose Asset Manager Setup.
3. Select Setup and choose Categories.

4. Do and of the following:
    a. To add a category
        i.   Select Add **+ Add**.
        ii. Enter a name for the category and select Save.
    b. To edit a category:
        i.   Select Edit **✎ Edit** next to the category.
        ii. Update the name of the category and select Save.
    c. To delete a category, select Delete **🗑 Delete** next to the category.

Manage insurance

Use the information in this section to add, edit, and delete insurers and insurance policies.

1. Select the menu icon ⋮⋮⋮ and choose Asset Manager in the Finance group.
2. Select ⚙ Setup and choose Asset Manager Setup.
3. Select Setup and choose Insurance.

Insurers

Insurer Name	Action
GIO Australia	✏ Edit 🗑 Delete
QBE	✏ Edit 🗑 Delete

+ Add

Insurance Policies

Insurer	Policy Number	Start Date	End Date	Description	Action
GIO Australia	C98762341	01/07/2023	23/09/2024	Technology Hardware Policy - All workstations, laptops, printers, Ipads and listed digital hardware Phone 1300 888 998	Edit Delete
QBE	QBE123456	01/12/2023	01/12/2024	Technology Hardware Policy - all work stations, laptops, printers, ipads and listed digital hardware	Edit Delete

+ Add

4. Do any of the following:
   a. To add an insurer:
      i. Under Insurers, select Add + Add .
      ii. Enter a name for the Insurer and select Save.
   b. To edit an insurer:
      i. Select Edit ✏ Edit next to the insurer.
      ii. Update the name of the insurer and select Save.
   c. To delete an insurer, select Delete 🗑 Delete next to the insurer.
5. Do any of the following:
   a. To add an insurance policy:
      i. Under Insurance Policies, select Add + Add .
      ii. Start tying the name of the insurer (previously added) and select from the options displayed.
      iii. Enter the policy number, start and end date, and a description.
      iv. Select Save.
   b. To edit insurance policy details:
      i. Select Edit ✏ Edit next to the policy.
      ii. Update details and select Save.
   c. To delete an insurer, select Delete 🗑 Delete next to the policy.

Manage registers

Registers enable schools to label the type of asset and adds another level to define your fixed assets such as buildings and keys. For example, office, whole school, CAPA, Library.

> **Tip**: Buildings are defined in Location and keys are defined in Keys.

Manage Registers

Register Name	Action
Staff Personal	✏ Edit 🗑 Delete
Lost n Found	✏ Edit 🗑 Delete
Visitor Belongings	✏ Edit 🗑 Delete
School Property	✏ Edit 🗑 Delete
Printers	✏ Edit 🗑 Delete
+ Add	

To add a register

Use the information in this section to add a custom register.

1. Select the menu icon ⠿ and choose Asset Manager in the Finance group.
2. Select ⚙ Setup and choose Asset Manager Setup.
3. Select Setup and choose Registers.

Manage Registers

Register Name	Action
Staff Personal	✏ Edit 🗑 Delete
Lost n Found	✏ Edit 🗑 Delete
Visitor Belongings	✏ Edit 🗑 Delete
School Property	✏ Edit 🗑 Delete
Printers	✏ Edit 🗑 Delete
+ Add	

4. Do any of the following:
    a. To add a register:
        i. Select Add **+ Add**.
        ii. Enter a name for the register and select Save.
    b. To edit a register:
        i. Select Edit **✏ Edit** next to the register.
        ii. Update the name of the register and select Save.
    c. To delete a register, select Delete **🗑 Delete** next to the register.

Manage asset types

Use the information in this section to manage an asset and provide detail to the categories and registers you have created. Assets can be financial, infrastructure, public IT, fixed or digital. For example, technology, furniture, equipment, resources.

Manage locations

Overview

Use the information in this section to define buildings and rooms.

> 💡 **NSW DoE schools:** If Sentral is your school's master data source, you can create new rooms in Sentral and have the rooms pushed up to department's system. You can also view and manage department rooms that were originally created in ebs and synced down to Asset Manager during the transition from the department's system.

Rooms that existed in ebs (NSW DoE)

ebs supported room information but not building information. Sentral supports both. Rooms that existed in the department's system and were synced down to Asset Manager during the transition will initially show against 'No Building'. You can then define the building information in Asset Manager.

See View a room and Edit or delete a room.

Example: Rooms created in ebs get allocated to a building called 'No Building'

Manage rooms created in Sentral

Use the information in this section to perform a range of tasks for rooms created in Sentral:

- create new rooms locally
- use the timetable availability flag
- discontinue using any room by changing its status to Inactive.

> ℹ️ **Note:** If you are unable to access the Asset Manager module, you may need to contact your Sentral administrator to be provided the permission for accessing the module. You need access to Asset Manager Setup to perform tasks such as adding buildings and rooms.

View a room

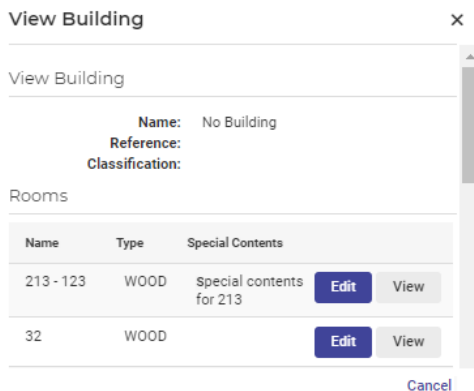Use the information in this section to view a building and associated rooms information.

1. Select the menu icon ⠿ and choose Asset Manager in the Finance group.
2. Select ⚙ Setup and choose Asset Manager Setup.
3. Select Setup in the left menu and choose Locations.
   The Buildings screen displays.
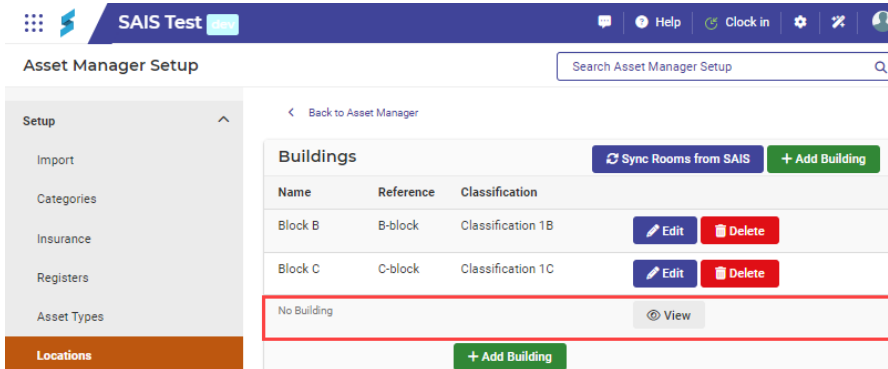
4. Select View or Edit next to a building.
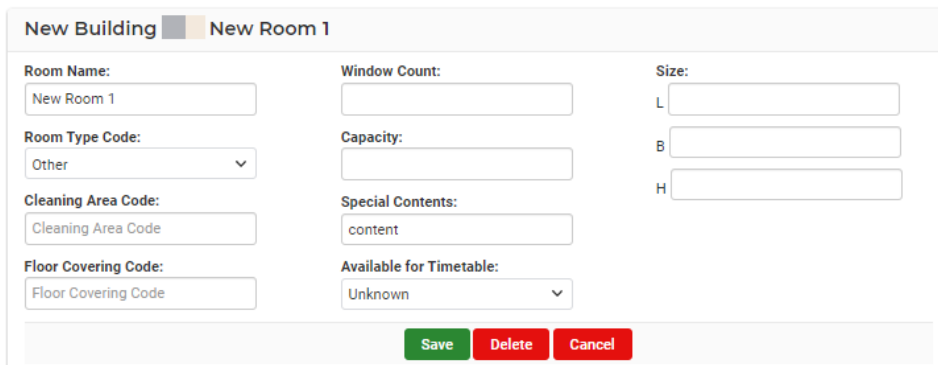   Either the View Building screen or the Edit Building screen displays for the selected building.

> ℹ **Note:** *The View button only shows against 'inbuilt' buildings. For other buildings, select the Edit button against a building to view and edit building information.*

Edit or delete a room

1. Select the menu icon ⠿ and choose Asset Manager in the Finance group.

2. Select ⚙ Setup and choose Asset Manager Setup.

3. Select Setup in the left menu and choose Locations.
   The Buildings screen displays.

4. Do one of the following:
   a. For an inbuilt building, select View next to the building. In View Building, under Rooms, select Edit next to the room.
   b. For other buildings, select Edit next to the building. In Edit Building, under Rooms, select Edit next to the room.
   Details for the selected room display in edit mode.

5. Do any of the following:
   a. View room details. Select Back to return to the Buildings screen.
   b. Update room details, and then select Save.
   c. Select Delete to remove the room's association with the building, and then select Confirm.
   Although you won't see the deleted room anymore, Sentral's database keeps a record for audit purposes.

Add a new room

1. Select the menu icon (⋮⋮⋮) and choose Asset Manager in the Finance group.

2. Select ⚙ Setup and choose Asset Manager Setup.

3. Select Setup in the left menu and choose Locations.
    The Buildings screen displays.

4. Select Edit next to a building.
    The Edit Building screen for the selected building displays.
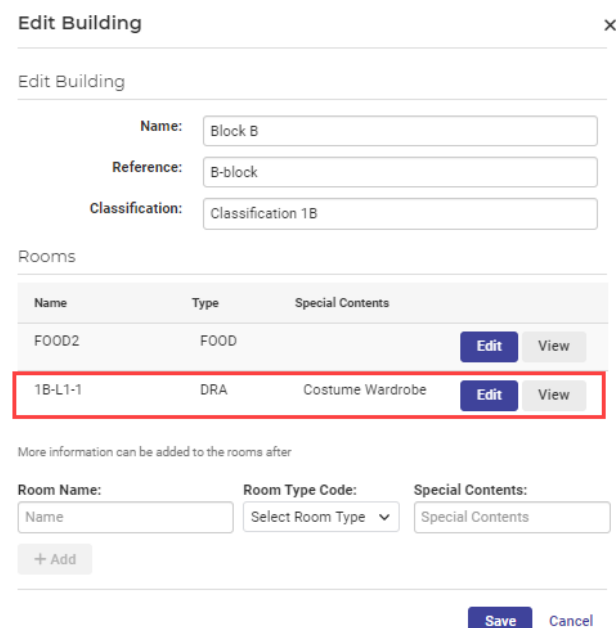
5. Under Rooms:
    a. Enter a name for the new room, and then select Add.
    b. Select Save.
    The Buildings screen displays.

6. Select Edit [✎ Edit] next to the building containing the newly created room.
    The Edit Building screen displays a list of rooms for the building.

7. Select Edit next to the room you just created.

8. Enter room details, specify whether the room is available for Timetable, and then select Save.

Manage custom fields

Use the information in this section to add additional fields not provided in the default settings.

1. Select the menu icon ( ) and choose Asset Manager in the Finance group.
2. Select Setup and choose Asset Manager Setup.
3. Select Setup in the left menu and choose Custom Fields.
4. Under Custom Fields:
    a. Enter a name for the custom field.
    b. Select the type, maximum length of text, value type and area (asset or item).
    c. Select Save.

Manage status

Sentral supplies a default list of asset statuses that can be managed or added to. These cannot be edited.

1. Select the menu icon ( ) and choose Asset Manager in the Finance group.
2. Select Setup and choose Asset Manager Setup.
3. Select Setup in the left menu and choose Status.
4. Do any of the following:
    a. To add a new status, under New Status in the right pane, enter details and select Save.
       Default means only admins can see/remove the status.
    b. To delete an existing status, select Delete next to the status.

Manage keys

Use the information in this section to build up your school's Key Register for all Master Keys and Key Holders.

1. Select the menu icon (⋮⋮⋮) and choose Asset Manager in the Finance group.
2. Select ⚙ Setup and choose Asset Manager Setup.
3. Select Setup in the left menu and choose Keys.

4. Do any of the following:
   a. To add keys:
      i. Complete details in the right pane. Select the building, room, the purpose, key type, and the staff member who holds the key.
      ii. Select Add.
   b. To edit existing key details:
      i. Select Edit on the applicable row.
         Fields in the right pane are populated.
      ii. Edit details and select Add.
   c. To copy existing key details:
      i. Select Copy on the applicable row.
         Fields in the right pane are populated.
      ii. Edit details and select Add.
   d. To delete existing key details, select Delete on the applicable row.

Manage notification settings

Use the information in this section to enable push notifications for staff/users when a new asset has been added to this module or when a user requests administrator sign-off on stocktake lists.

1. Select the menu icon (⋮⋮⋮) and choose Asset Manager in the Finance group.

2. Select ⚙ Setup and choose Asset Manager Setup.

3. Select Setup in the left menu and choose Notifications.

4. Specify whether to allow notifications.

5. Select users to receive a notification (based on their preferences) when important events occur.

6. Select groups to receive these notifications.