

User Guide – Asset Manager

February 2024 v1.0




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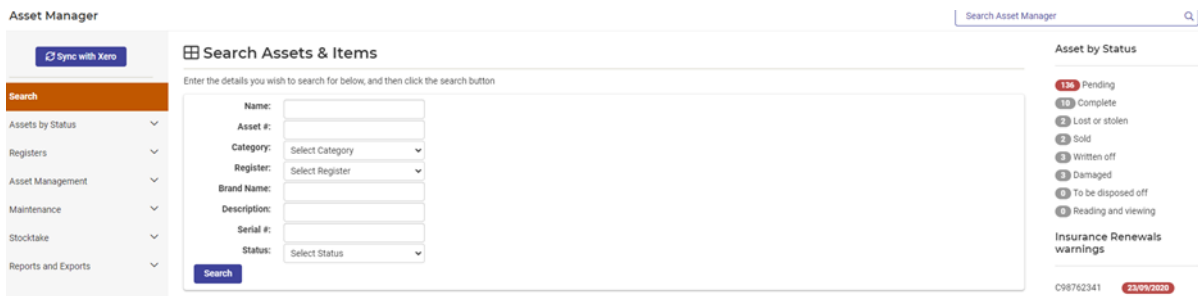
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Overview

Asset Manager provides a comprehensive online asset management charter and can link to a Finance Management System (FMS). It enables schools to track assets according to various categories and types and run maintenance checks, stocktakes and insurance checks.

Asset manager home screen

1. Select the menu icon () and choose Asset Manager in the Finance group. The Asset Manager dashboard displays. This provides an overview and ability to search for assets and items.




2. Use the search bar at the top right-hand to search for an asset.



3. Use the Assets by Status options in the right pane to view an abbreviated read only list of current assets by status.

Search for assets and items

Use the information in this section to generate a list of assets and/or items.

1. Select the menu icon () and choose Asset Manager in the Finance group.
The Asset Manager dashboard displays.

2. Select Assets by Status in the left menu and choose a status to display assets within that status.

Pending Assets					
Asset #	Quantity	Name	Type	Category	Source
FA-0011	1	Speakers	Fixed Asset	Computer Accessories	XERO Edit View
FA-0012	1	Speakers	Fixed Asset	Computer Accessories	XERO Edit View
FA-0013	1	Scanner	Fixed Asset	Copiers, Faxes and Scanners	XERO Edit View
FA-0015	1	Printer	Fixed Asset	Printers	XERO Edit View
FA-0016	1	Laptop	Fixed Asset	Computer	XERO Edit View

3. Select any column heading to change the order of display.

The source column provides where the information for this asset has come from – Sentral or an FMS.

Asset #	Quantity	Name	Type	Category	Source
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4. Do any of the following:

- a. Select Edit to update details for the asset/item.

Not all assets can be edited.

- b. Select View next to an asset/item to see more detail for the asset/item.

View provides a read only display for that item. Details may also include the Purchase Details, but this is dependent on the information synced from an FMS or imported into Sentral.

- c. Select the Upload Now link to upload relevant documents for the asset (e.g. Purchase Order).

View Speakers [Clone](#) [Edit](#) XERO

Asset Number: FA-0011	Insurer: Not available	Quantity: 1
Name: Speakers	Insurance Policy: Not available	Is Split: Yes
Brand: Dell		Description: Speakers
Model: DL - 35S		Editable: Yes
Status: Pending		Last Sighted: No available
Register: Staff Personal		
Asset Type: Fixed Asset		
Category: Computer Accessories		
Colour: Not available	Allowed to loan: Not available	Renew: Not available

Purchase Details [▼](#)

Speakers : Items [▼](#)

Documents

No documents have been uploaded
[Upload Now](#)

- d. If the Clone option is available, select this to duplicate the asset/item. Complete the asset details online and select Save.

- e. Select Edit from the asset/item details screen.

Only certain sections can be completed online. If greyed out, these fields cannot be altered. If your school has created custom fields, these will appear here.

If an additional item is listed under the asset, there may be functionality to Edit and view the details.

<p>Asset Number: FA-0011</p> <p>Name: Speakers</p> <p>Brand: Dell</p> <p>Model: DL - 35S</p> <p>Status: Pending</p> <p>Register: Staff Personal</p> <p>Type: Fixed Asset</p> <p>Category: Computer Accessories</p> <p>PO Number:</p> <p>Account: - 4260 - Computer Equip +\$5,000</p> <p>Colour:</p>	<p>Insurer: Select Insurer</p> <p>Insurance Policy:</p> <p>Purchase Date: 22/09/2020</p> <p>Allowed to loan: No</p>	<p>Quantity: 1</p> <p>Split Asset: Yes</p> <p><small>Allows for extra information per item.</small></p> <p>Description: Speakers</p> <p>Allow Editing: Yes</p> <p><small>The ability to edit the asset</small></p> <p>Purchase Price: \$</p> <p>Renew: No</p>
---	---	---

Save
Cancel

Registers

Overview

Use the information in this section to view information in either the default registers or any custom registers your school has added. The three default registers include:

- Buildings
- Keys
- All Assets & Items.

Buildings register

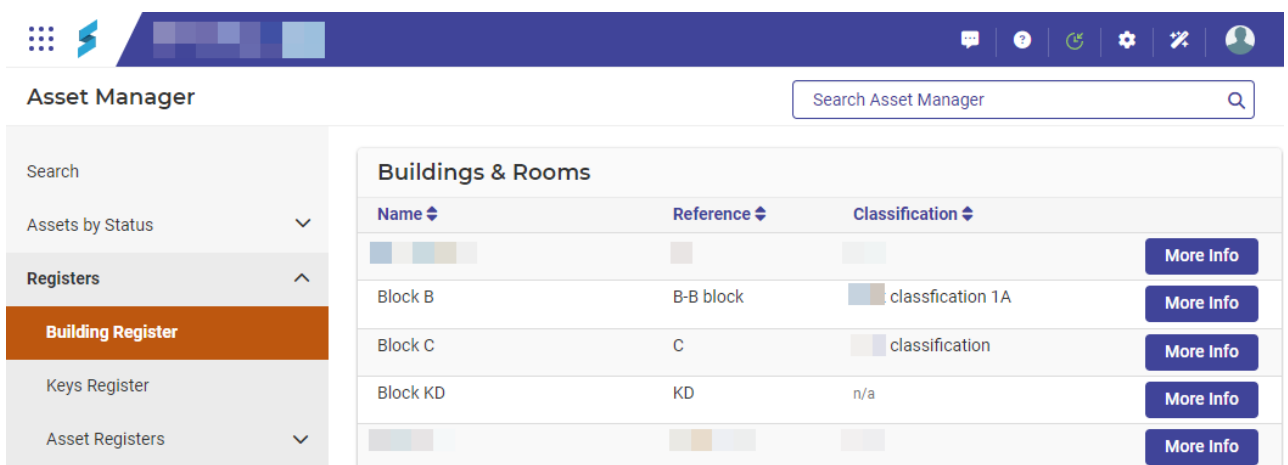
Rooms that existed in ebs (NSW DoE)

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'. Your Sentral Administrator can then define the building information in Asset Manager.

For details, see the [Asset Manager Admin Guide](#) and [ebs Decommission Project – Sentral Enhancements](#).

View existing rooms

1. Select the menu icon (⋮) and choose Asset Manager in the Finance group.
2. Select Registers in the left menu and choose Building Registers.
The Buildings & Rooms screen lists any active rooms. If your school has not set up buildings and rooms, you'll need to do that first via Asset Manager Setup.



The screenshot shows the Asset Manager interface. On the left, there is a navigation menu with 'Registers' expanded to show 'Building Register' selected. The main area displays a table titled 'Buildings & Rooms' with columns for Name, Reference, and Classification. Each row has a 'More Info' button.

Name	Reference	Classification	More Info
Block B	B-B block	classification 1A	More Info
Block C	C	classification	More Info
Block KD	KD	n/a	More Info

3. Select More Info next to a Building to see rooms assigned to the building.
Room information for the building displays.



NSW DoE schools: If Sentral is your school's master data source, this information is synced from the department's system.

Name	Room Type Code	Cleaning Area Code	Floor Covering Code	Available for Timetable	Window Count	Capacity	Special Contents	Size (LxBxH)
Staff Room - Staff	SR	n/a	n/a	No	n/a	n/a	n/a	n/a
Classroom - Primary - D.G.6	C	n/a	n/a	Yes	n/a	28	n/a	n/a
Classroom - Primary - D.G.11	C	n/a	n/a	Yes	n/a	28	n/a	n/a
Classroom - Primary - E.G.8	C	n/a	n/a	Yes	n/a	28	n/a	n/a
Stage - J.G.2	HALL	n/a	n/a	Yes	n/a	n/a	n/a	n/a
	OLA	n/a	n/a	Yes	n/a	n/a	n/a	n/a
OS 602 13671								
Library - Library	LIB	n/a	n/a	Yes	n/a	n/a	n/a	n/a

- View details such as whether the room is available for timetable.



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.

Keys register

The Keys register is a list of all the keys in the school, their code sequences, who has access to them and what buildings they secure. It should be set up by your Sentral administrator.

View keys register

- Select the menu icon (⋮) and choose Asset Manager in the Finance group.
- Select Registers in the left menu and choose Keys Registers.

The Keys Register lists any keys recorded. This screen is read only.

Keys Register				
Building	Room	Purpose	Key Type	Holder
BLOCK J	J1	Master Key	Biometrics	Marybeth Baile
BLOCK D	D6	Safe	Padlock	Willia Andersen
BLOCK C	C4	Staff Bathroom	Swipe Card	Rana Cawker
BLOCK J	J2	Master Key	Electronic	Manuela Antill
BLOCK J	J2	Master Key	Electronic	Gladis Adamson

Asset registers

Overview

Your main register is the Asset register. If you are using an accounting package like Xero, all your Assets are automatically synchronised each night with Sentral's Asset Manager module.

View asset registers

1. Select All Assets & Items or select from your asset & item categories
2. Select the menu icon (☰) and choose Asset Manager in the Finance group.
3. Select Registers in the left menu and choose Asset Registers.
4. Select All Assets & Items or select from your asset and item categories.

Source	Asset Number	Name	Type	Category	Status	Building	Room	Staff Member		
XERO	AN-0001	Computer	Fixed Asset	Computer	Complete	Admin	Admin 1	BAUER, Elvie	Edit	View
XERO	AN-0002	Keyboard	Fixed Asset	Computer Accessories	Lost or stolen	Admin	Admin 1	n/a	Edit	View
XERO	FA-0009	Computer	Fixed Asset	Computer	Damaged	BLOCK J	J1	n/a	Edit	View
XERO	FA-0010	Keyboard	Fixed Asset	Computer Accessories	Damaged	BLOCK A	AHTWELFARE	n/a	Edit	View

5. Do any of the following:
 - a. Select View next to an asset or item to view details.
 - b. Select Edit next to an asset or item to update details.

Asset Management

Complete a quick edit

Use Quick Edit to edit assets once a search has been completed.

1. Select the menu icon (☰) and choose Asset Manager in the Finance group.
2. Select Asset Management in the left menu and choose Quick Edit.

Quick Edit

Search Assets

Keyword Select Asset Type Select Category

<input type="checkbox"/> Item	Asset Number
Search for assets	

<input type="checkbox"/> Item	Asset Number
No assets selected	

3. Either enter keys words, run an asset type search or category search.
4. Select one or more items to edit, and then select Next.

Quick Edit

Search Assets

Keyword Furniture & Fittings Select Category

<input type="checkbox"/> Item	Asset Number
<input checked="" type="checkbox"/> Office equipment	FA-0142
<input checked="" type="checkbox"/> Chairs	FA-0144
<input type="checkbox"/> TEST ONLY	SA-0153

<input checked="" type="checkbox"/> Item	Asset Number
<input checked="" type="checkbox"/> Chairs	FA-0144
<input checked="" type="checkbox"/> Office equipment	FA-0142

5. Select fields to edit, and then select Next.

Fields to Edit	
<input checked="" type="checkbox"/>	Asset Type
<input checked="" type="checkbox"/>	Category
<input checked="" type="checkbox"/>	Register
<input type="checkbox"/>	Status
<input type="checkbox"/>	Brand Name
<input type="checkbox"/>	Model
<input type="checkbox"/>	Description
<input type="checkbox"/>	Split

[Back](#) [Next](#)

6. Edit the selected fields, and then select Save.

Quick Edit Selected Items

i Pressing the arrow on the inputs below will fill the information downwards

Asset #	Asset	Asset Type	Category	Register	Status	Description
FA-0144	Chairs	Furniture & Fittings	Select...	Staff Personal	Pending	2 x Chairs
FA-0142	Office equipment	Furniture & Fittings	Select...	Staff Personal	Pending	Nespresso coffee machi

[Save](#)

Select...


- Default Category
- Computer
- Computer Accessories
- Copiers, Faxes and Scanners
- Printers
- Office Equipment
- Air Conditioning
- Computer Monitors
- Phones
- Furniture
- Loads
- Motor Vehicles
- Maintenance
- Heating

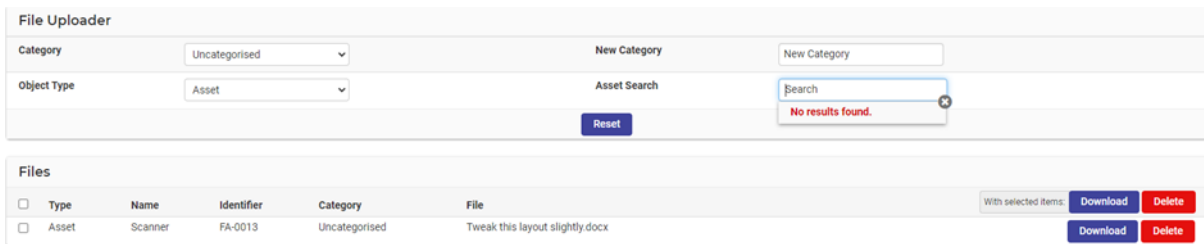
Upload document

Overview

Use the information in this section to upload a document related to an asset (for example, an insurance policy or purchase order).

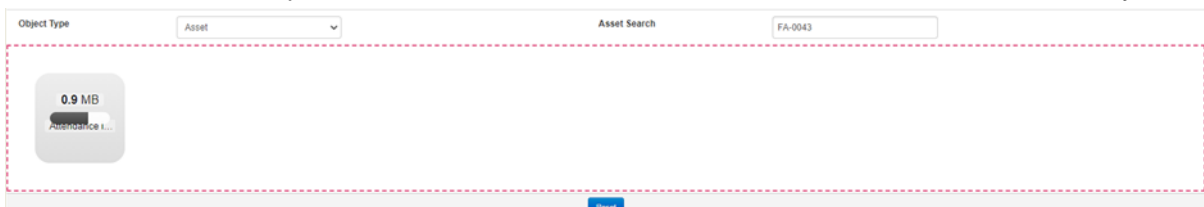
Upload asset related documents


1. Select the menu icon () and choose Asset Manager in the Finance group.
2. Select Asset Management in the left menu and choose Document Upload.



File Uploader						
Category	Uncategorised	New Category	New Category			
Object Type	Asset	Asset Search	Search <input type="text"/> No results found.			
<input type="button" value="Reset"/>						
Files						
<input type="checkbox"/>	Type	Name	Identifier	Category	File	With selected items: <input type="button" value="Download"/> <input type="button" value="Delete"/>
<input type="checkbox"/>	Asset	Scanner	FA-0013	Uncategorised	Tweak this layout slightly.docx	<input type="button" value="Download"/> <input type="button" value="Delete"/>

3. Select Category and Object type.
This enables a direct asset search (via the Asset Search field).
4. Select the Asset and drop files to upload against that asset.
Once the document is uploaded, it is listed under Files and is available to be downloaded at any time.



Object Type	Asset	Asset Search	FA-0043
<div style="border: 2px dashed red; padding: 10px; display: inline-block;"></div>			
<input type="button" value="Upload"/>			

Maintenance

Overview

Use the information in this section to schedule some maintenance for school assets.

Schedule asset maintenance

1. Select the menu icon (☰) and choose Asset Manager in the Finance group.
2. Select Maintenance in the left menu and choose Schedule Maintenance.

Schedule Maintenance

Maintenance Date:

Select an Asset:

Information:

Recurring: Once Off Monthly Yearly

* If you don't select an item after selecting an asset, it will add all the items to the list.
** The items list will only populate if the asset is set to split.

Asset	Asset Number	Serial Number
No Assets Selected		

3. Complete details for the maintenance.
 - a. Select the maintenance date.
 - b. Under Select Asset, select each asset to be added to the maintenance schedule.
Once added, the assets display in the Asset list.
 - If you don't select an item after selecting an asset, it will add all the items to the list.
 - The items list will only populate if the asset is set to split.
 - c. Specify the frequency of the maintenance – Once Off, Monthly or Yearly.
4. Select Save.
The scheduled maintenance displays in the Maintenance register.

View maintenance register

Use the information in this section to view the maintenance register and manage scheduled maintenance.

1. Select the menu icon (☰) and choose Asset Manager in the Finance group.
2. Select Maintenance in the left menu and choose Maintenance Register.

Date	Information	Recurring	Assets	Action
01/08/2016	Connection Test Audio / Visual Test Clean the device	Monthly	FA-0027 FA-0027 FA-0027 FA-0027	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
18/08/2016	Clean the keys, check the cable, remove the dust and dirt	Yearly	FA-0010 FA-0010 FA-0013	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

3. View the list of all maintenance that has been scheduled.
4. Do any of the following:
 - a. Select Edit to update asset maintenance.
 - b. Select Delete to delete scheduled maintenance for an asset.

Stocktake

Overview


Use the information in this section to perform a stocktake to assess and record the amount of stock and identify missing assets/items or those that need to be upgraded or replaced. Steps include:

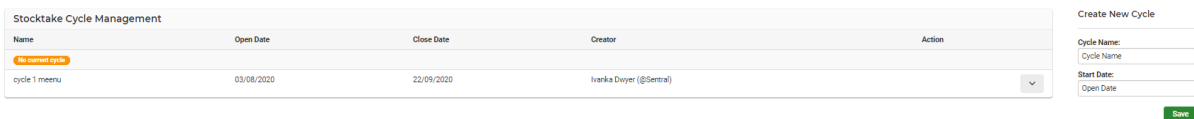
- Create a New Cycle
- Create a Stocktake list
- Perform a Stocktake
- Close a Cycle
- List Unsighted Items.

Manage cycles



Note: If other stocktake cycles have been created, they will appear here to be closed off. Schools should only be able to create one stocktake cycle.

1. Select the menu icon () and choose Asset Manager in the Finance group.
2. Select Stocktake in the left menu and choose Manage Cycles.



Name	Open Date	Close Date	Creator	Action
No current cycle				
cycle 1 meenu	03/08/2020	22/09/2020	Ivanka Dwyer (@Sentral)	

Create New Cycle

Cycle Name:


Start Date:

Open Date:

Save

3. To create a new cycle:
 - a. Under Create New Cycle in the right pane:
 - b. Enter a name for the cycle.
 - c. Select a start date.
 - d. Select Save.

The new cycle defaults to ALL assets and sits in a pending status.



Name	Open Date	Close Date	Creator	Action
Open: Efy	30/10/2020		Ivanka Dwyer (@Sentral)	


Edit **Close Cycle**

List Name	Created Date	Staff Name	Status
All Assets	22/09/2020		Pending

4. Select All Assets to open the asset list.

Record stocktake

Use the information in this section to create further stocktake lists or manage the current default one.

1. Select the menu icon () and choose Asset Manager in the Finance group.
2. Select Stocktake in the left menu and choose Record Stocktake.

Record Stocktake: Computers

Keyword Asset Type Category Location:

Stocktake Lists

Stocktake-audit-29/07/2016

Stocktake-audit-18/08/2020

{hly}tj

No lists defined

Stocktake-audit-06/03/2018

Stocktake-audit-06/03/2018

Stocktake-audit-06/03/2018

Teststocketale-1

No lists defined

2020 list

No lists defined

3. Determine the stocktake method to use:
 - a. For a full stocktake, select Search to display all assets.
 - b. For a partial stocktake:
 - i. Use key words, asset type, category, or location to search for the assets.
 - ii. Tick the items and then choose Select Items.

Record Stocktake: Computers

Keyword Asset Type Category Location:

Asset Selection

<input checked="" type="checkbox"/>	Item	Asset Number
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0097
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0098
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0102
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0103
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0104
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0105
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0127
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0129
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0130
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0131

<input checked="" type="checkbox"/>	Item	Asset Number
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0131
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0130
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0129
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0127
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0105
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0104
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0103
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0102
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0098
<input checked="" type="checkbox"/>	Motor Vehicles	FA-0097

4. Select Next.
5. Under Stocktake Sight Items:
 - a. Enter the List Name.
 - b. Start typing the assignee and select from the options displayed.
 - c. Select Save List.

Stocktake Sight Items

Check which items have or have not been sighted

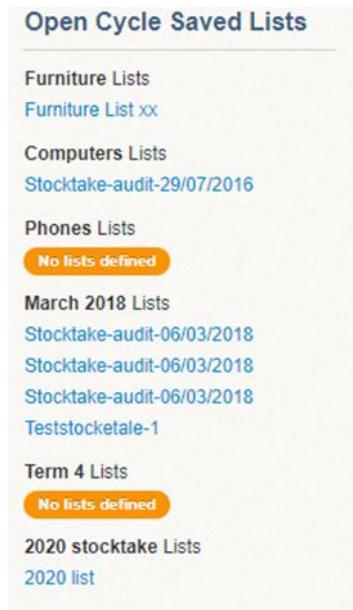
List Name

Assignee

Asset No.	Name	Quantity	Sighted	Comment
<input type="button" value="Request Sign-off"/> <input type="button" value="Save"/>				

6. If you are not ready to perform a stocktake, select Save.

The screen refreshes back to the Record Stocktake screen and the list displays in the right pane.



Perform a stocktake


1. Open a stocktake list to commence the stocktake. Use one of the following options:
 - Immediately after creating a stocktake list
 - Opening an existing (and unmarked) list that was created previously and open it to commence the stocktake.


The Stocktake Sight Items screen displays.



Note: You cannot print these stocktake lists.

Asset No.	Name	Quantity	Sighted	Comment	
FA-0039	Furniture	1	<input checked="" type="checkbox"/>		▼
FA-0043	Office equipment	1	<input checked="" type="checkbox"/>		▼
FA-0046	Office equipment	1	<input checked="" type="checkbox"/>		▼
FA-0049	Furniture	1	<input type="checkbox"/>		▼
FA-0050	Office equipment	2	<input type="text" value="0"/>		▼
FA-0054	Computer	1	<input type="checkbox"/>		▼

2. Select the arrow  to expand an item.
3. Do any of the following:
 - a. Select More Info to view more detail for the item.
 - b. If there is a hyperlink, update serial number, building or room.
4. Perform the stocktake.
 - a. Mark all the items you find (and sight).
 - b. Record a comment.
 - c. Select Save.

A confirmation screen displays the status of all assets.
 - d. Select Save again.
5. Go to the Manage Cycles screen and select Close Cycle .



List unsighted items

The List of Unsighted Items are connected to two things:

- a stocktake cycle being in existence and in open status
- a stocktake list being in existence too.



Tip: You need to have a cycle built for this feature to appear.

1. Select the menu icon () and choose Asset Manager in the Finance group.
2. Select Stocktake in the left menu and choose List Unsighted Items.
3. Select a cycle from the list.
A list of unsighted assets from your selected cycle displays.
4. Select to write off an asset .
5. Mark the list as Complete or go back to the stocktake list and sight those assets.
The items or assets will then have status as written off.

View Laptop	
Asset Number:	SA-0141
Name:	Laptop
Brand:	Toshiba
Model:	TCE321
Status:	Written off
Register:	Lost n Found
Asset Type:	Fixed Asset
Category:	Computer

The current status of the stocktake is displayed on the Asset Manager home screen.

EFY

All Assets	136	Pending
Computers	3	Pending
Office Furniture	3	Pending

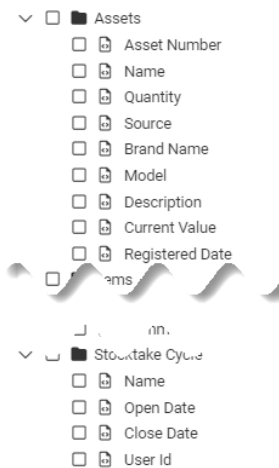
Reports & Exports


Use the information in this section to select and build the Asset Report or Export that you require.

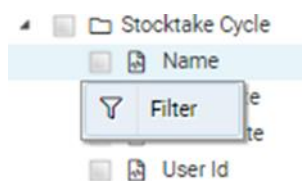
1. Select the menu icon (☰) and choose Asset Manager in the Finance group.
2. Select Reports & Exports in the left menu and choose List Unsighted Items.



3. Select items from the Field list.
Each Category is expandable to allow for more specific filtering. If you would like a report on specific assets, select the specific checkboxes you need.



4. Do any of the following:
 - a. Select list items, choose an Export Type, and then select .
 - b. Right click a field to add a filter.



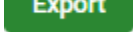
A list populates in the Filters section.

Filters

If you wish to use filters please right click a field in the fields list and select filter.

Field	Comparator	Type	Value	Action(s)
Name	Select a Comparator	Select a Type	<input type="text"/>	Remove

[Export](#)

- c. Choose options in the Filters section and then select .