



Performing an Event

Print this document to follow along and take notes on the video.

1. First, find the asset to perform an event on. Using the Smart search you can enter a serial, rfid or reference number.
2. Or use can use the Asset search to perform an advanced search to find the asset. Use the criteria and click “Run”
3. On the asset you would like to perform the event on move your mouse over the Actions link and Select “Start Event”
4. You can now select a scheduled event to complete or an ad-hoc event
5. Once you have selected the event to start you are now in the Event workflow
6. The first section is a summary of the asset the event is being performed on
7. You can update the owner details if needed – for example if the location has changed.
8. Next is the information about who and when the event is being completed. We can also assign this event to a book to group numerous events together.
9. We will now move onto the event form. The event form is broken down into Sections, Criteria, and Observations.
10. Sections will group different criteria together. Move through the sections by either clicking on the arrows or the jump to drop down.
11. The criteria will have a shield beside it. Simply click on this shield to change the outcome.

Notes:



12. Observations are broken down into Recommendations and Deficiencies. Click the blue i to record a recommendation and the red hand for a deficiency.
13. The post event information will allow you to enter comments, indicate if a printable report is available and the asset status.
14. Event Schedules will show all auto-scheduled events and allow you to schedule other events such as follow up inspections and repairs.
15. Upload an attachments such documents or images.
16. Click Save to complete your event.
17. You will now see your completed event and if a PDF report was selected a Print link at the top will allow you to download the report.