USING RECFIND 6 AS AN ASSET MANAGEMENT SYSTEM

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RecFind 6 Asset Management Functionality

Introduction

RecFind 6 is in fact the next generation of Knowledgeone (K1) and it has a superset of the functionality of K1. RecFind 6 was based on K1, not RecFind 5.

RecFind 6 was created using later technology than K1 (Visual Studio .NET 2008) and a new user interface based on the latest Microsoft .NET 'smart-client' paradigm – this is one of the reasons it looks so different to K1 (a browser based 'thin-client' product).

The other reason RecFind 6 looks so different to K1 is that we engineered it to have a familiar RecFind look and feel so that our RecFind 5 customers would feel more comfortable with this brand new product.

K1 was delivered as a generic application solution able to run multiple business applications concurrently. One of the many applications we 'pre-configured' in K1 was asset management. This meant making sure the required data model (tables and fields) was there to support asset management and also making sure that the required business processes were present, right down to including formulas for depreciation and asset valuation.

All the tables and business processes of K1 were carried forward to RecFind 6. RecFind 6 now in fact can do far more than K1 (the next release of K1 will be a similar leap forward).

Because RecFind 6 is marketed as a RecFind 5 replacement and as an Electronic Document and Records Management Solution (EDRMS) it may not be apparent that it is also a generic application solution just as K1 is a generic application solution.

Anything you can do with K1 you can do with RecFind 6. This means you can easily configure RecFind 6 to be your asset management system, your help desk system, your complaints management system, your HR system or your CRM.

What is an asset management system?

Every business has physical assets.

Physical assets can be common things like desks, computers, copiers etc. They can also be 'industrial' like milling machines and lathes.

Every one of these assets was purchased, has a finite life, needs to be continually valued (usually annually) and eventually needs to be replaced.

An asset management system takes care of managing, tracking and valuing an asset throughout its lifecycle.

Note that assets may also be part of a collection, say in a museum. They could be things like rare books or paintings a or sculptures or photographs.; basically anything of value an organization 'owns' or 'holds' that needs to be registered (i.e., we bought it/acquired it, etc) managed and tracked.

We aren't supposed to lose assets and we are supposed to know their current status, location and worth. This is why we use asset management systems.

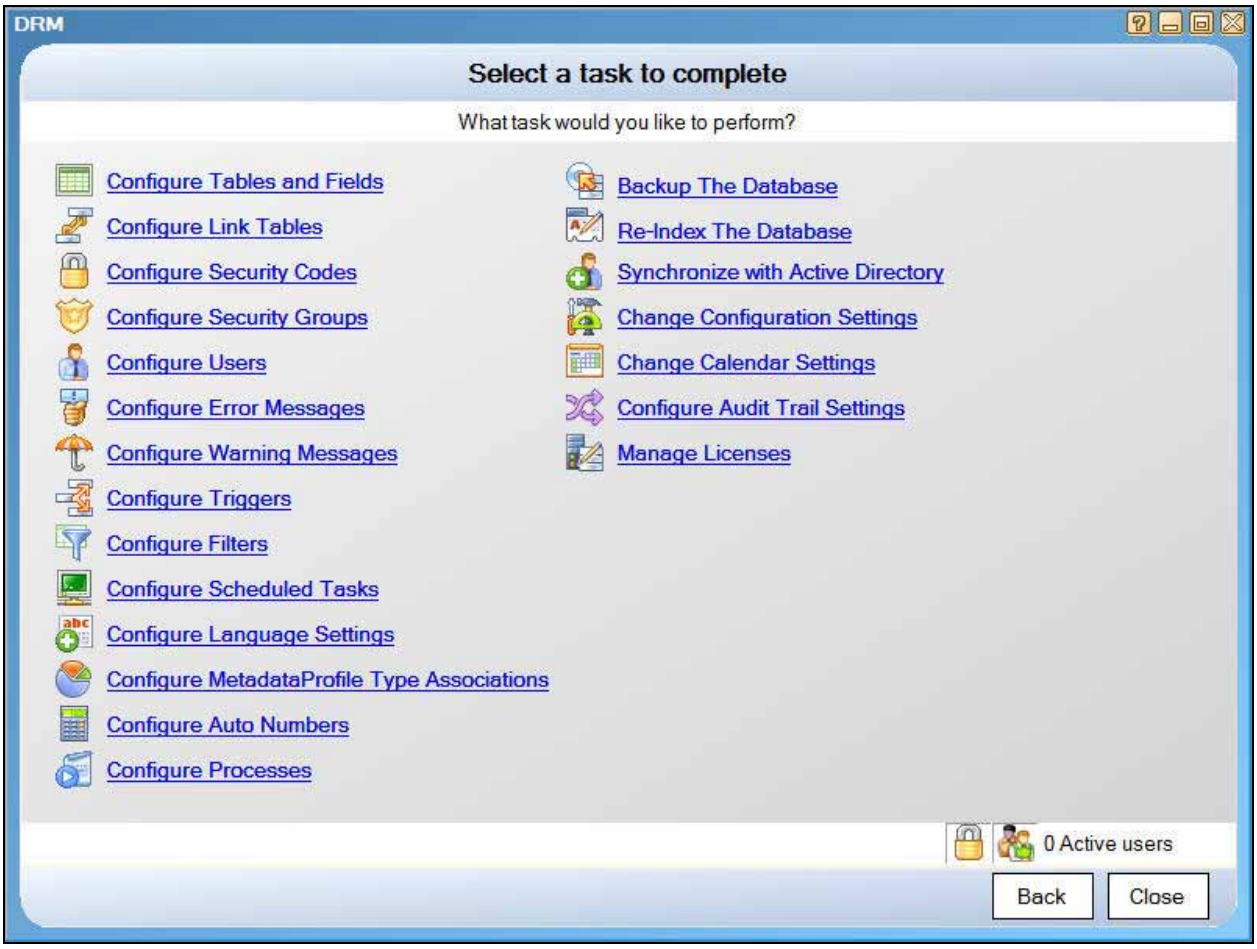
Data Model

In RecFind 6 we use the MetadataProfile table to hold details of all assets (The MDP table was specifically designed to hold the Metadata on any 'object'). This means we configure this table 'by type' to be an asset table. The 'configure by type' functionality of RecFind 6 means we can create any number of unique views of any table and modify fields and captions to be specific to the needs of a particular application. This modification or configuring by type is done using the high level tool provided free with every copy of RecFind 6, the DRM.

RecFind 6's security system works hand in hand with the 'configure by type' functionality to manage access to sensitive information. For example, only asset managers and their staff will see asset information in RecFind 6. Asset records will be invisible to other staff whose security rating does not provide access to asset records. The security system is also granular down to the field level and functionality level so the asset manager may for example allow staff from other areas to view certain classes of asset, but not all fields, and inhibit their ability to add, modify or delete asset records.

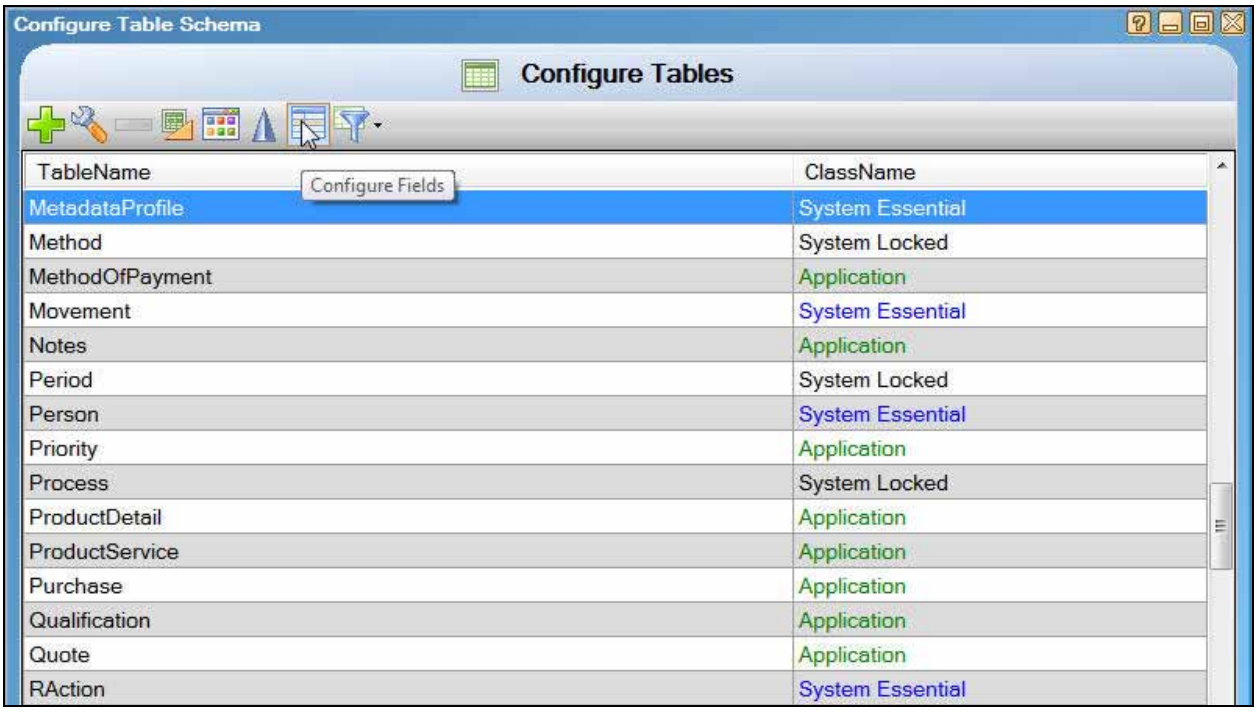
Similarly, asset staff can have their access limited solely to asset related information such that all other information stored in RecFind 6 is invisible to them. In this way you can effectively partition information access to whatever degree (i.e., down to the field level) your organization requires.

Using the DRM

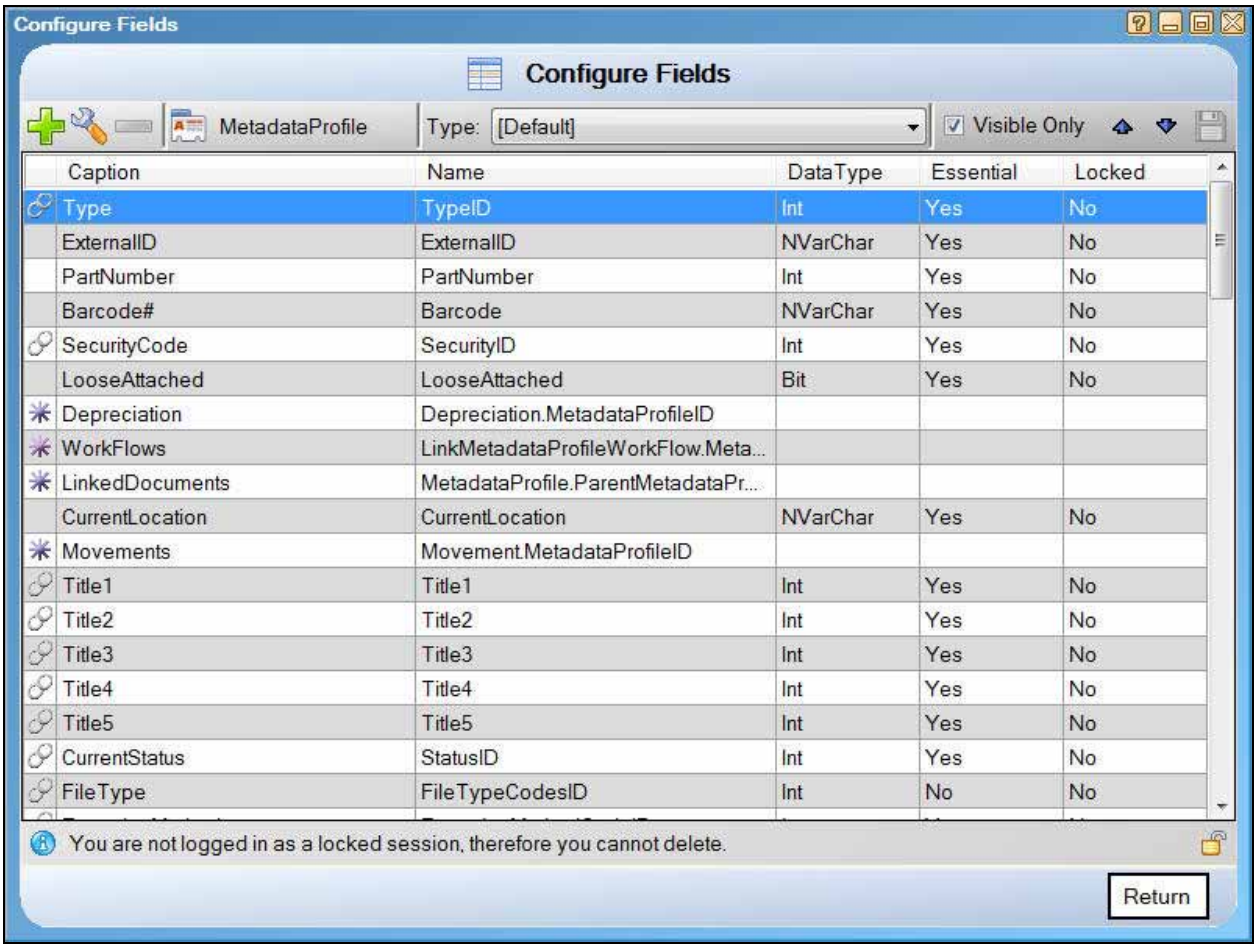


Select 'Configure Tables and Fields'.

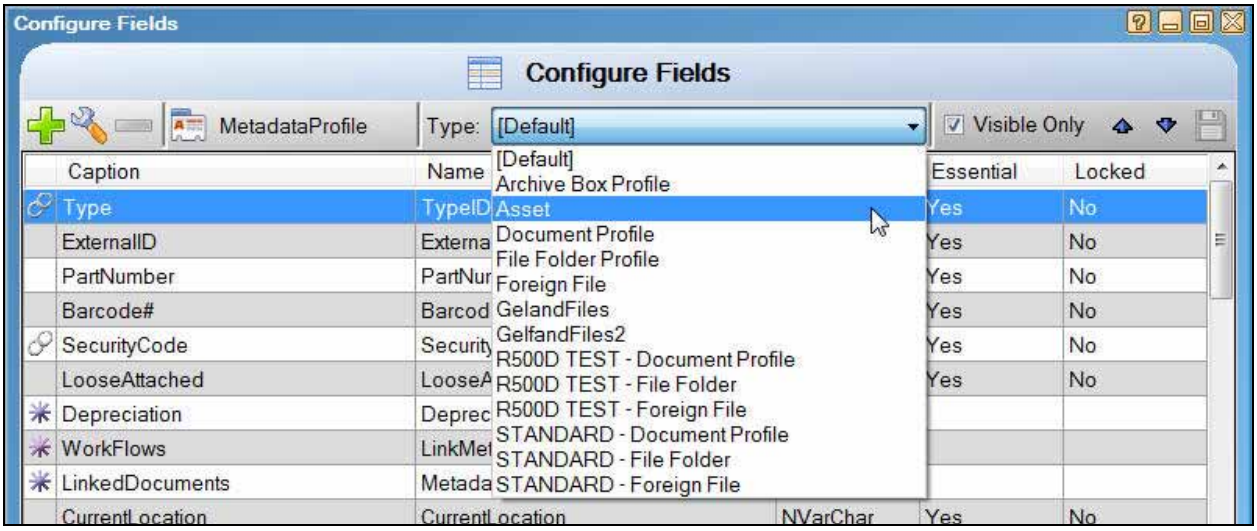
Configure Tables and Fields



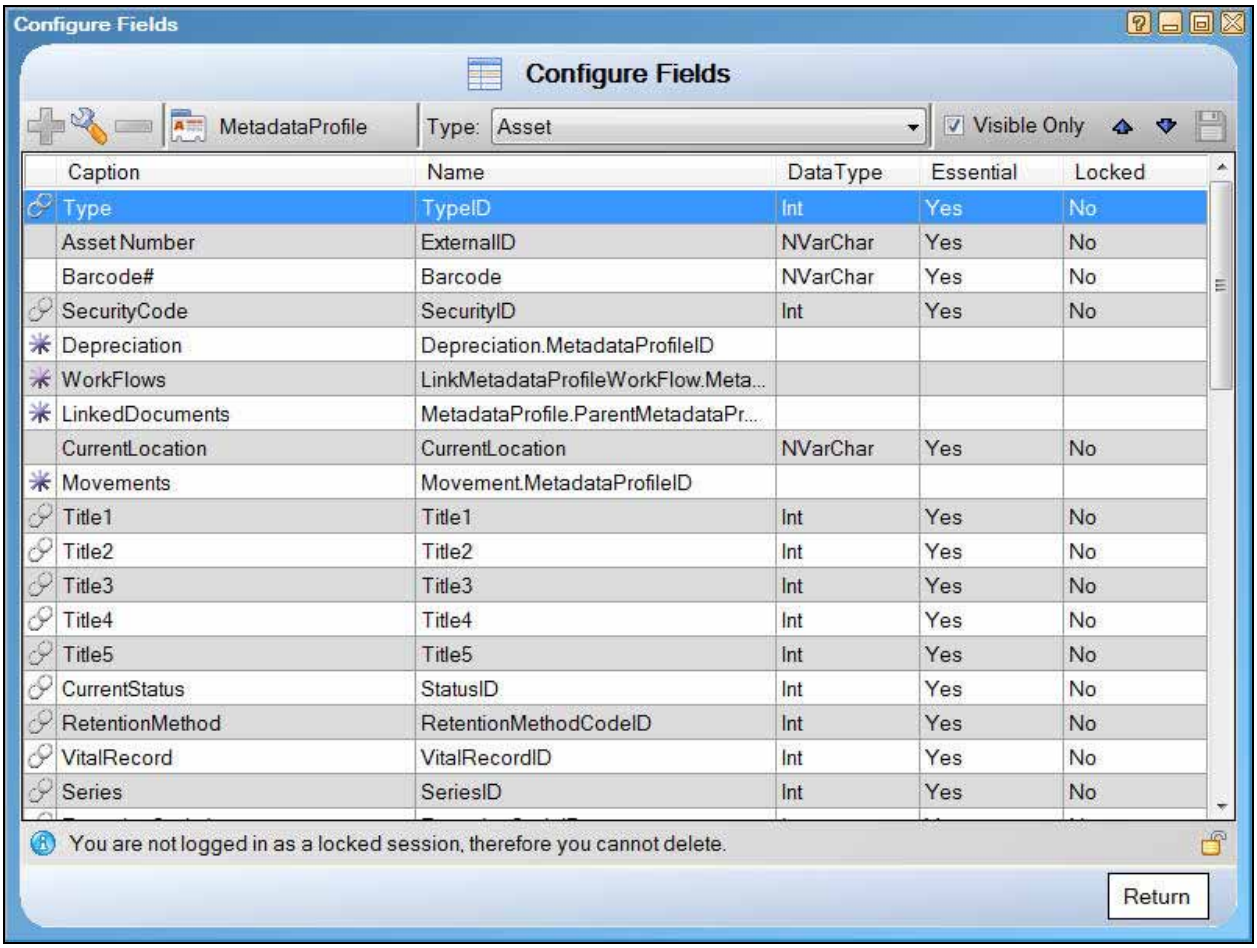
Select 'Metadata Profile' table and click 'Configure Fields'.



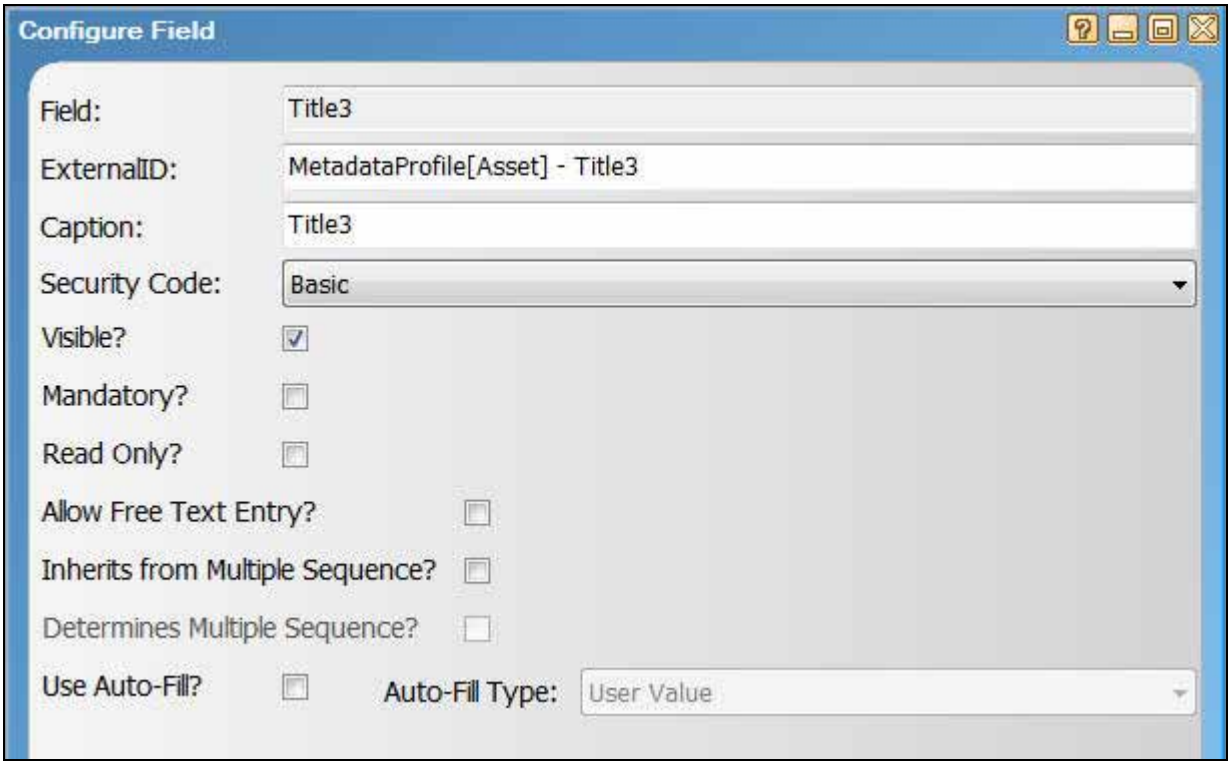
The above is the default 'Type' configuration of a Metadata Profile record. Click on the 'Type' drop down to see the 'Types' that have been configured.



Select 'Asset'.



This is where you configure the Metadata Profile record to your exact requirements for an 'Asset'. You can make fields visible or invisible, you can change captions and you can change auto values. You can also add new fields if required. See modify screen below:



Summary

This means you can use the DRM to easily and quickly create a unique view of the Metadata Profile table that has exactly the information you need (and no more) to represent your assets. You have total control of the data model.

Business Processes

Most of the business processes you will need to manage your assets are a standard part of RecFind 6. For example, add, modify, clone, delete, print (RecFind 6 has a very powerful inbuilt report writer so you can modify existing reports or create new reports virtually at will), move etc.

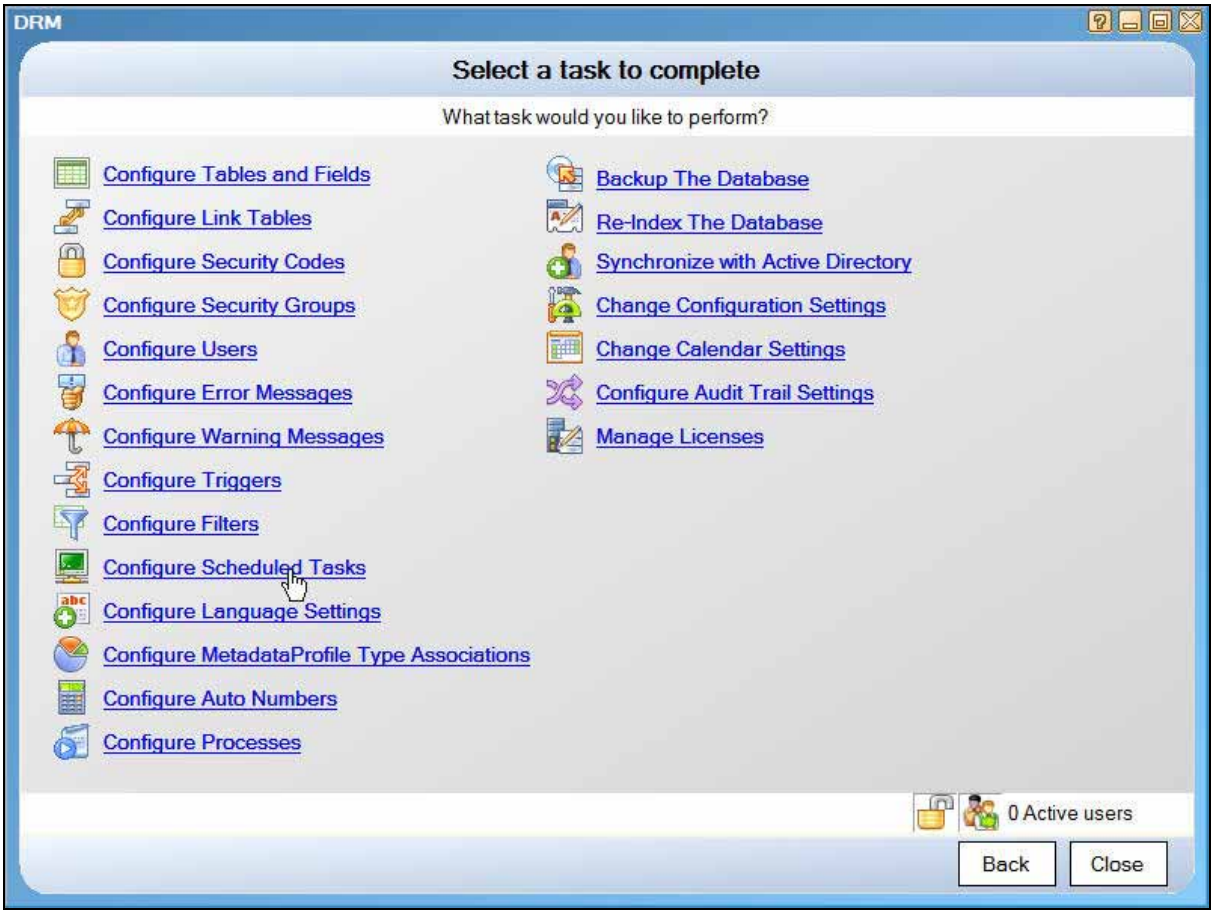
RecFind 6 also has very powerful search functions so you can instantly find and view the details of any asset or class of asset.

And of course, RecFind 6 includes a powerful security system and a configurable audit trail so you can both manage access and meet all auditing and compliance requirements.

RecFind 6 also support a full set of barcode reader functions enabling you to barcode all assets and track them by this barcode. These functions also extend to portable barcode readers so your staff can do audits of assets in any location and produce census and reconciliation reports.

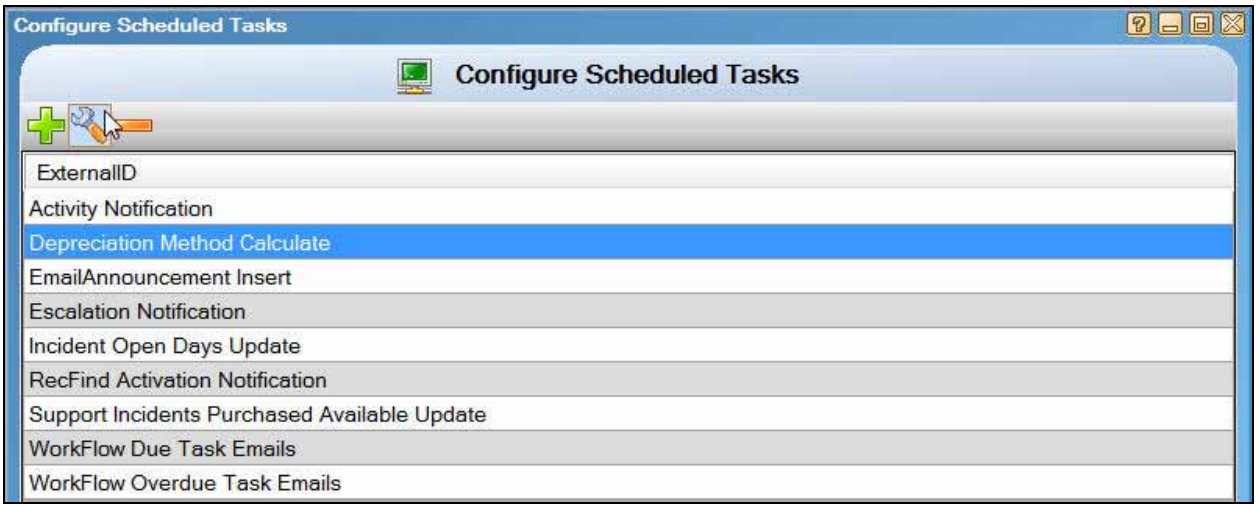
RecFind 6 clients can also be deployed using web services so you can provide access to the RecFind 6 system to remote locations (a boon for mining companies) connecting via your Intranet or the Internet.

RecFind 6 also includes standard functionality to value assets using one of two methods (but you can modify these methods or add new methods). This logic is visible using the DRM, see below.

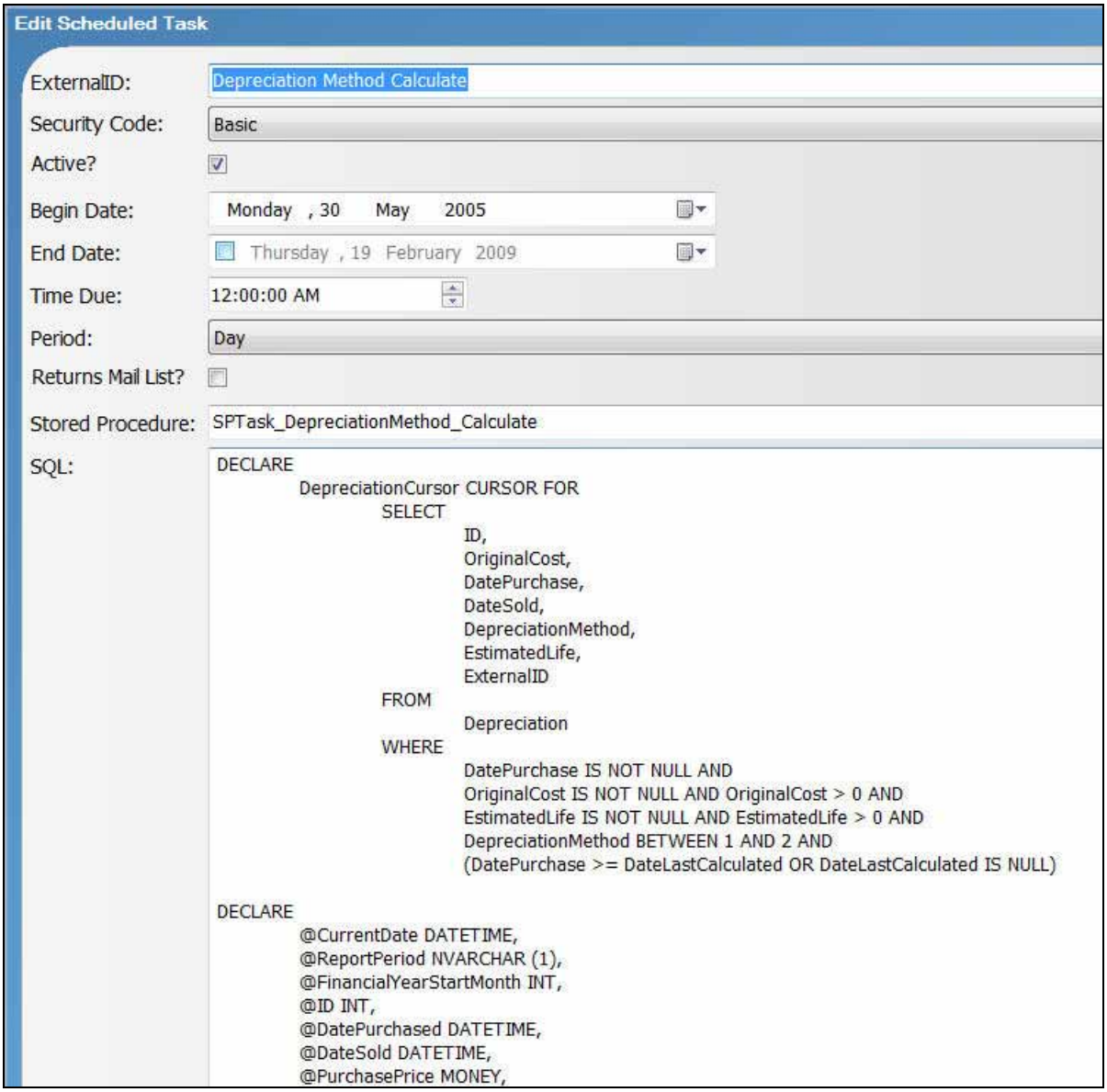


Select 'Configure Scheduled Tasks'.

Then select 'Depreciation Method Calculate' and click the modify button as below.



This is where we maintain the formulas for depreciation. (See below). These are 'open' and can be modified either by your staff or us to meet your exact requirements.



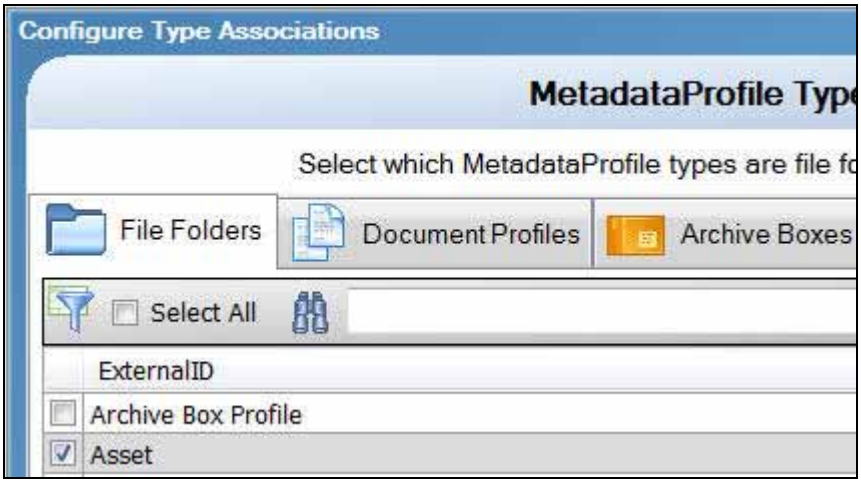
As well as standard depreciation formulas (which are applied automatically say at the beginning of each financial year) you can add any amount of other logic using the DRM by assigning rules for the values of fields, links between fields, filters and 'code' in the form of SQL triggers and stored procedures. You can also add email enablement to any process such that key personnel are notified when an event happens. All of these changes can be made using just the DRM.

Summary

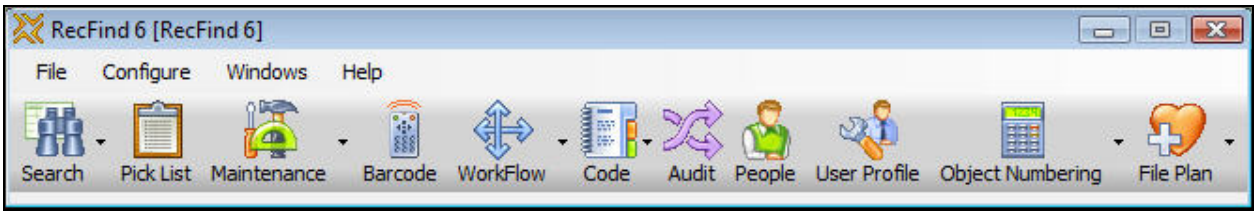
You have total control over the business processes required for your asset management application.

Adding an Asset

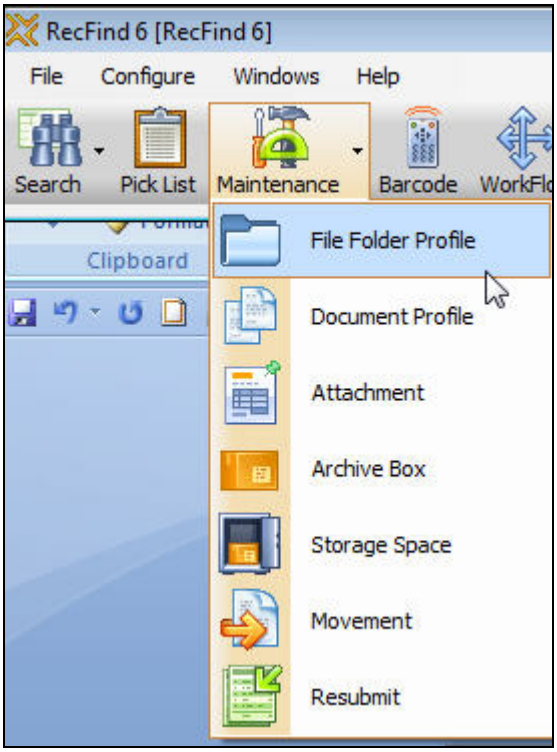
Note: that you will need to first set an asset to be associated with file folder profiles in the DRM.



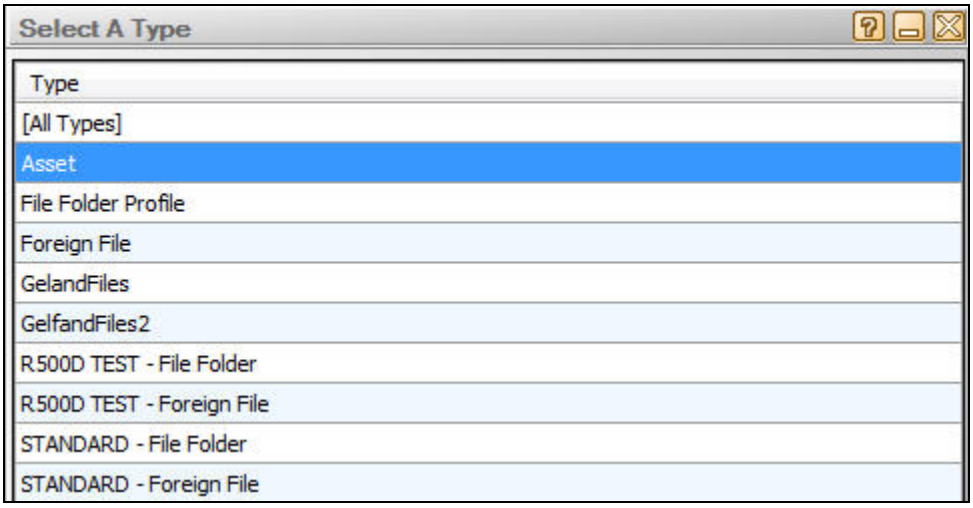
We begin with the RecFind 6 toolbar.



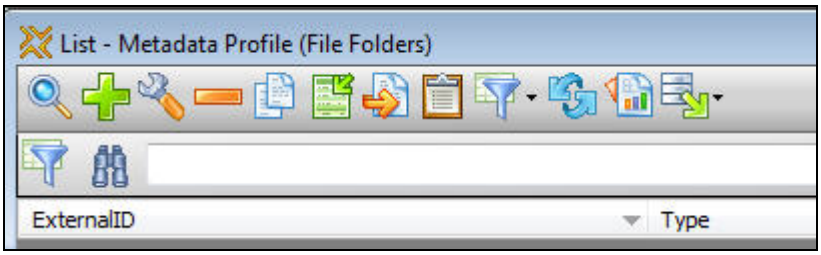
Select 'Maintenance' and then select 'File Folder Profile'.



Then select 'Asset' as below.



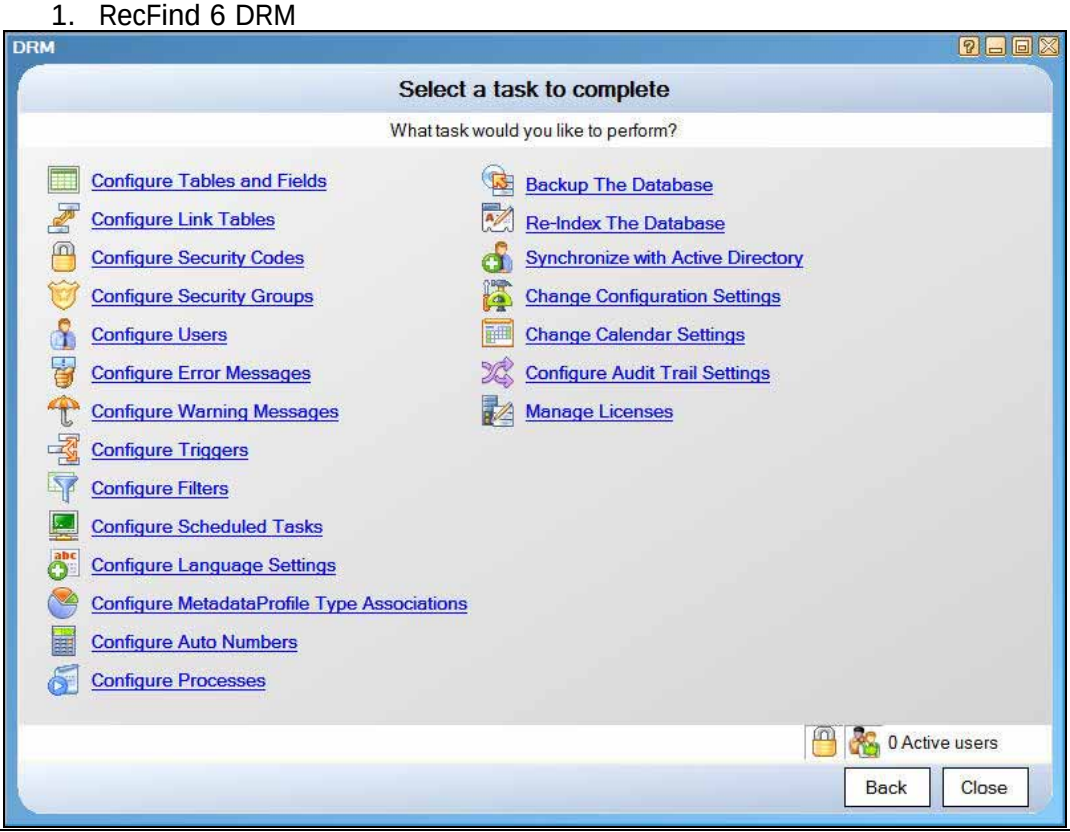
Now you are able to View, add, Modify, Delete, Clone, Print, Sort, Export, etc, asset records.



Step by step

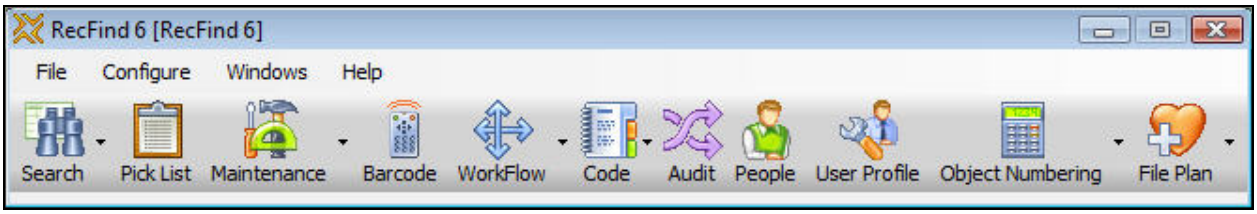
The following step by step instruction assumes you have RecFind 6 and the DRM installed and are making the changes specified in sequence.

1. RecFind 6 DRM



a. Select Configure Security Codes
    i. Add ‘Asset Management’ Security Code
b. Select Configure Security Groups
    i. Add ‘Asset Management’ Security Group
        1. Security code = Asset Management
        2. Nominated Security = Asset Management
    ii. Select Tables, Fields & Methods tab
        1. Tick/untick as required
    iii. Select Application Methods tab
        1. Tick/untick as required
    iv. Select Security Codes tab
        1. Tick/untick as required (e.g., Basic and Asset Management)
c. Select Configure Tables & Fields
    i. Select MetadataProfile table
        1. Select Types button
            a. Add type = Asset
        2. Select Configure Fields button
            a. Select Asset type
            b. Unclick visible only checkbox
            c. Select fields to make invisible (i.e., not required for assets)
            d. Change order of fields to required order
            e. Change any captions to required terminology
d. Select MetadataProfile Type Associations
    i. Select Asset as either a File Folder or Document Profile (either works)
e. Select Configure Scheduled Tasks
    i. Select Depreciation Method calculate
        1. Select Modify button
            a. Modify formula to your requirements

2. RecFind 6 client



a. Select People button
    i. Select either Add or Modify button)
        1. Add/Modify asset management personnel/add User Profiles (select link from Person record), select ‘Asset Management’ as security Group

Summary

1. RecFind 6 as well as being a fully functional Enterprise Content Management solution (records management, document management, imaging, workflow, etc) is also a generic application solution able to run multiple applications concurrently.

2. Most of the tables and fields (data model) required for ‘other’ applications like asset management, help desk, HR management, CRM, etc are already part of the standard RecFind 6 data model. We pre-configured them in anticipation of you using RecFind 6 for multiple applications.

3. Most of the processes required for other applications are already part of the standard RecFind 6 system.
4. The RecFind 6 DRM tool provided free with every copy of RecFind 6 allows you almost total freedom in configuring the data model and any business process.
5. The RecFind 6 Xchange tool provided free with every copy of RecFind 6 makes it as easy as possible to import data into your 'new' applications from virtually any source, (e.g., Excel, Access, SQL, Oracle, DB2, etc).
6. RecFind 6's comprehensive standard suite of barcode functionality allows you to register and track and inventory assets using both fixed and portable barcode readers.
7. RecFind 6 provides all of the features and functionality you will need to manage your assets.