Asset Groups in Asset Monitoring App

The Asset Monitoring application includes an asset grouping feature where an individual user can assign assets in their company equipment list to a custom group and be able to share that group with other users in their company.

The grouping function assigns a unique tag to an asset serial number based on the criteria selected by the user.

Quick Links

What's Changed?

1. The location. There is no longer a column in the grid view. It is now always accessible and is located at the top left of the screen.

2. A single asset can now be assigned to multiple groups.

3. The ability to share Asset Groups. Users with Customer Admin or Finning Admin permissions can now share their groups with others.

4. How to assign assets to a group - you can no longer pre-select assets to a group.

5. Settings have been adjusted to unlock an asset group so other users with permissions (Customer or Finning Admin) can also edit groups.

Asset Group Tips and Feature Rules

- An asset can be **assigned to multiple groups**.

- **There is no audit log** showing users when changes were made to a group, or by who.

Asset Groups are:

- **unique to each individual user.**

- **unlocked when created.** You must navigate to settings to "unlock" the group to make changes.

- **static.** Dynamic groups that add and remove serial numbers based on changing asset characteristics such as location, hours, health status, etc. are not supported at this time.

- **shareable within your organization.**

  - Users with administrative access can create and share asset groups with other users who have a CUBIQ account within their company.

Action	User	Customer Admin	Finning Admin
Create personalized Asset Group	YES	YES	YES
Can edit their own Asset Group	YES	YES	YES
Can share Asset Group with others	NO	YES	YES
Can delete Asset Group shared with them	NO	YES	YES
Can lock, unlock, or edit Asset Groups shared with them but created by another user	NO	YES	YES
Can edit an Asset Group created by others	NO	NO	NO

Step-By-Step Instructions

In the **Asset Monitoring app**, you can create, view, edit or share your asset groups.

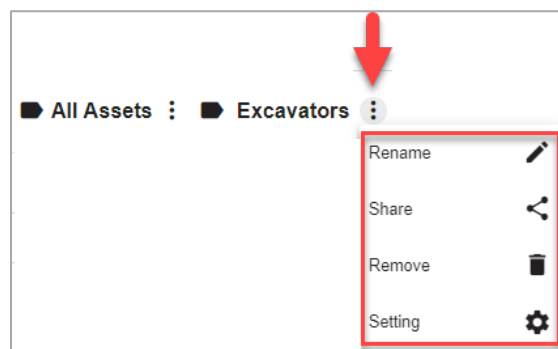1. The **first level** of the **All Assets ellipsis menu** provides access to:

   - **Add New** - create a new asset group
   - **My Groups** - view your groups and filter to view an asset group
   - **Shared** - view which groups have been *shared with you*
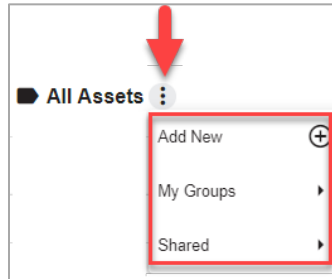
First Level Menu

2. The **second level** of your **All Assets** saved asset group **ellipsis menu** provides access to:

   - **Rename** - rename an asset group
   - **Share** - share an asset group with someone in your company (company or Finning admins only)
   - **Remove** - delete an asset group
   - **Setting** – manage assets, access and group settings (view and administer settings
     - o Owner – identifies who the owner of the group is
     - o Edit Settings – lock / unlock group settings
     - o Group Name – another way to rename the group
     - o Serial Number – add or remove assets (serial numbers) from the group
     - o Share Group – share groups with other people in the org

Second Level Menu

Create A New Asset Group

1. Click the **All Assets** ellipsis menu and select **Add New**
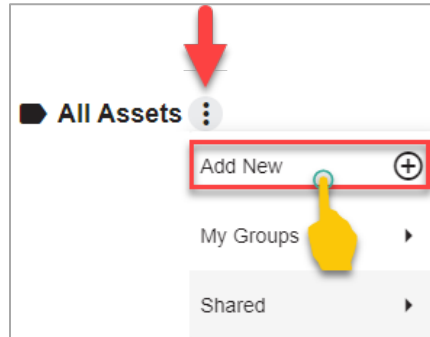
Select Add New

2. Enter an **Asset Group Name** that is easily identifiable to you

Enter an Asset Group Name

3. Expand the **Serial number** drop down list, select the **Serial number(s)** you would like to add to the **Asset Group** and click **Save**. You will receive a toast message indicating the group has been created. See tips to adding serial numbers below.
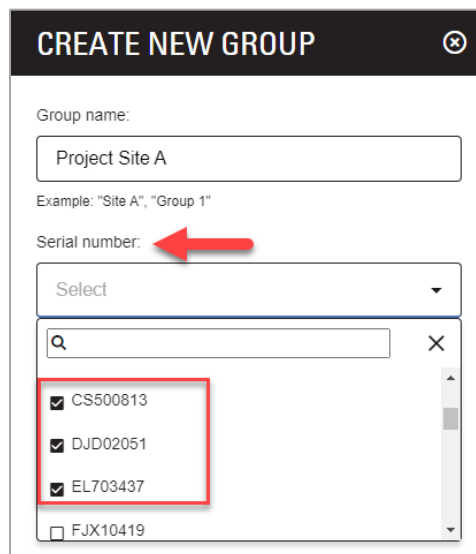
Select Assets for Group

Note: At any time after the group is set up, you can add or remove assets from the group.

Serial number is the only way to add an asset to a group. The first 3 columns will be blocked by the "Create New Group" box which cannot be moved.

We recommend that you:

1. Record the serial numbers you want in a group ahead of time OR

2. Visually filter the serial numbers in the grid view first. Position the Asset ID and Serial Number columns to the 4th and 5th column position to see what serial number(s) to select. Other pertinent data can be moved over as well.

Serial Number Search and Selection

1. Select the serial number by scrolling through the list OR

2. Enter the first few characters into the search box and select the asset
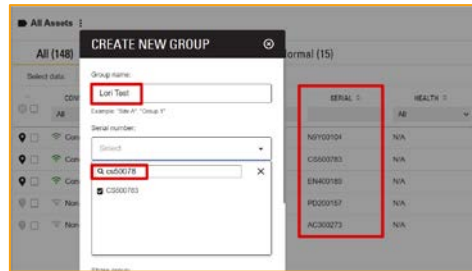
Add Serial Number column to grid view and reposition

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Edit an Existing Group – Add or Remove Assets

1. To add or remove assets to an existing group, select the **asset group** you want to edit and select **Setting**.
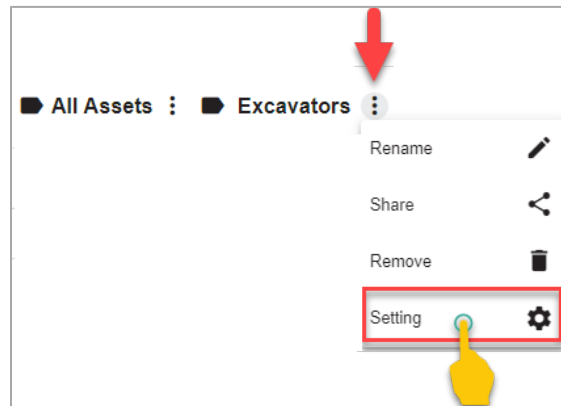

Select Setting to edit Asset Group

2. A **Settings** window will pop-up where you can make changes to the asset group – add, delete, change the group name, or share the group with others within your company.

- **Add assets** either by selecting the **serial number** from the list in the drop-down menu or typing the serial number in the search bar
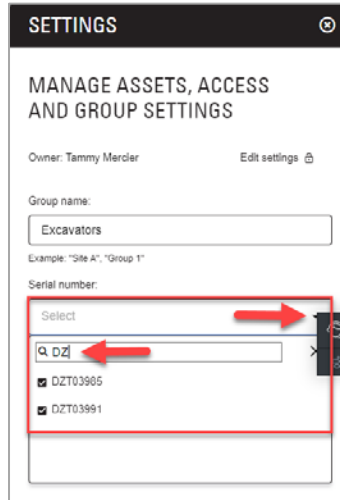
Add Asset to Group

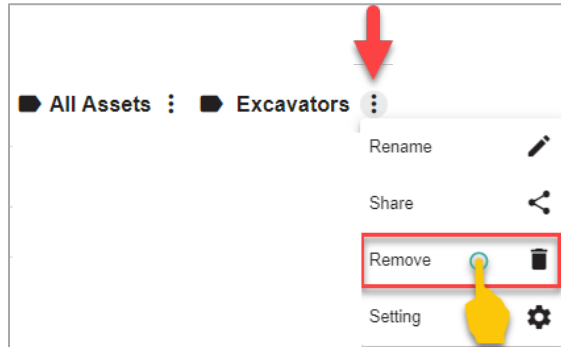- **Remove assets** by clicking the **X** on the serial number button.
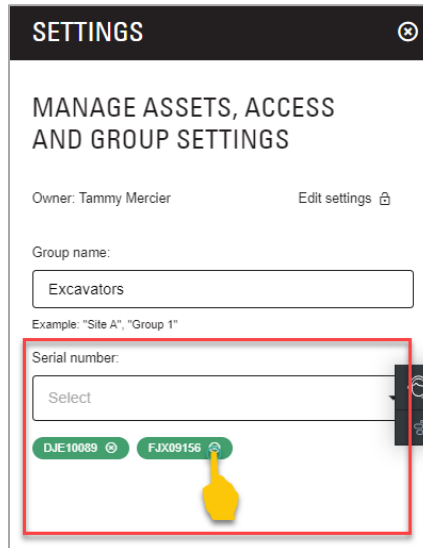
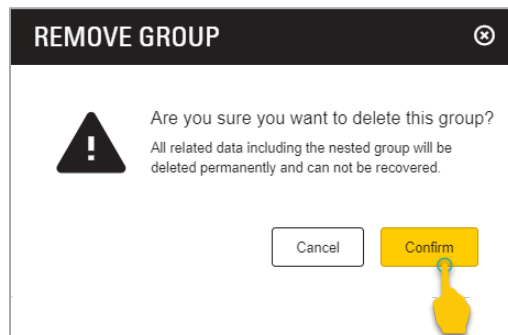Click X to remove Asset from Group

3. When edits are complete, click **Save**.

Delete an Asset Group

1. When viewing your asset group, click **Remove** to delete the group.

Select Remove to delete Asset Group

2. A pop-up window will appear confirming you want to delete the group. Click **Confirm**.
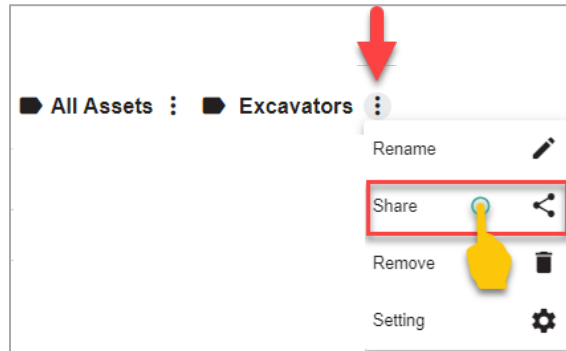

Confirm to remove Asset Group
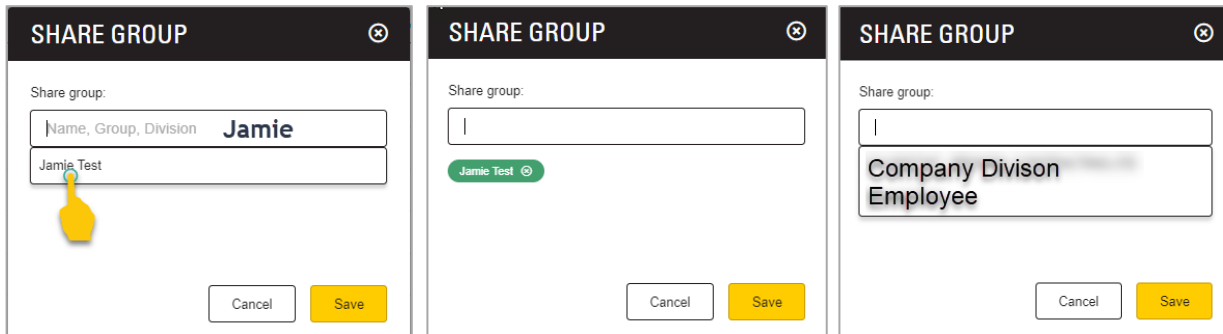
Shared Asset Groups

Share an Asset Group

Company Administrators can create and share groups with others who have a CUBIQ account within their company.

1. When viewing your asset group, click **Share**.

Remove Asset from Group

2. Enter the name of the person you want to share the asset group with and select the **name** from the menu. Click **Save**. **Note:** It is possible to add more than one employee or division in a single step.

Select an employee or division

3. The asset group will now have an icon as a visual indicator that the group has been shared.

Visual Indicator that Group is Shared

# Edit or Remove a Shared Asset Group

Company Administrators can remove shared groups from others within their company. **Note:** As a recipient of the Shared Group, it is not possible to remove the shared group.

1. When viewing your asset group, click **Setting** to edit the group.
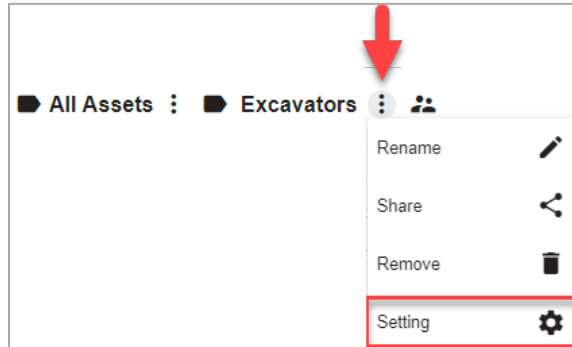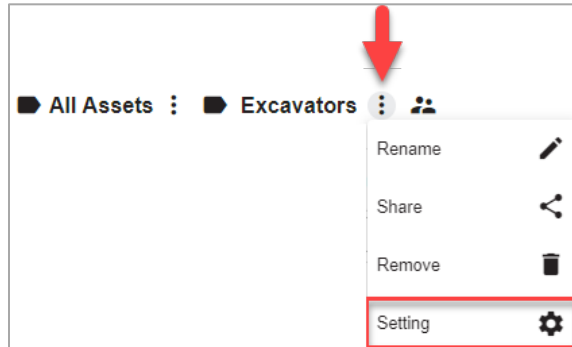

Select Setting to Edit Asset Group

2. Remove shared group by clicking the **X** on the contact or division. Click **Save**.
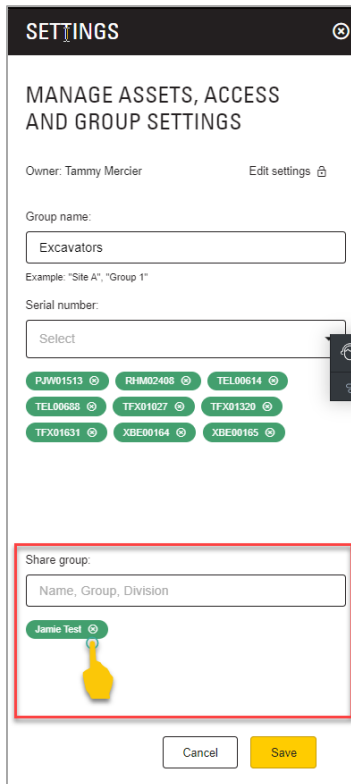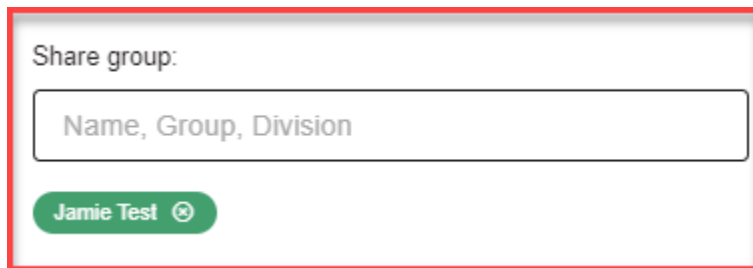

Click X to remove shared group

View who an Asset Group was Shared With

1. To view who the asset group was shared with, click **Setting**.


Select Setting to View Who

2. In the **Settings** window the users who were shared the group are listed in **green** under **Share Group**.


View all My Asset Groups

Once the Asset Group(s) have been set up, they are viewable and filterable. When selecting an Asset Group to view, the search results filter to the individual group only.

1. To view the asset groups you created, click the **All Assets ellipsis drop down** and select the **Group** under **My Groups**. When selecting an **Asset Group** to view, the search results filter to the individual group only.
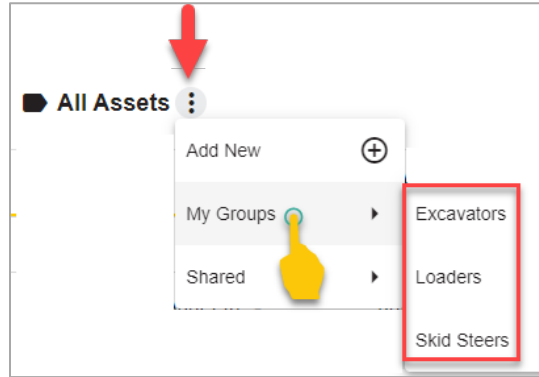
View my Asset Groups

2. To view the asset groups shared with you, click the **All Assets ellipsis drop down** and select the **Asset Group** under **Shared**.
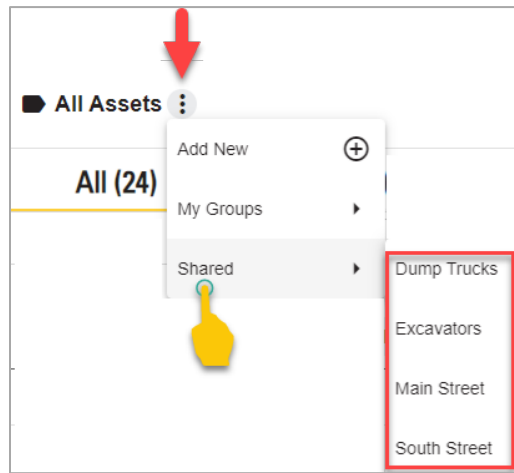
View Shared Groups

Note: Only a single group or all assets can be selected to be viewed at any one time. Viewing multiple asset groups simultaneously is not possible.

View One Asset Group at a Time

Reset to All Assets View

1. When viewing your asset group, click **All Assets** to remove the filter to see the entire asset list.

Click All Assets to remove Asset Group filter

Edit Asset Group Settings

Settings is where you can make changes to the asset group, group settings and manage assets - add, delete, change the group name, or share the group with others within your company.

1. When viewing your asset group, click **Setting** to edit the group. A **Settings** window will pop-up where you can make changes to the asset group.
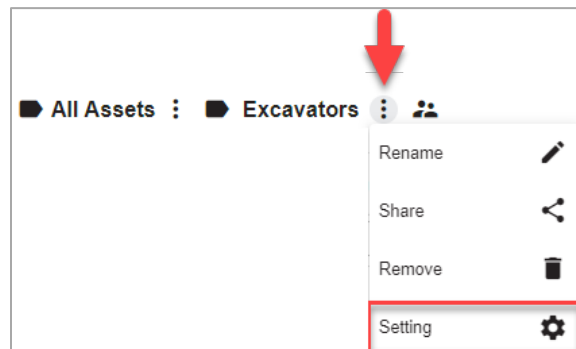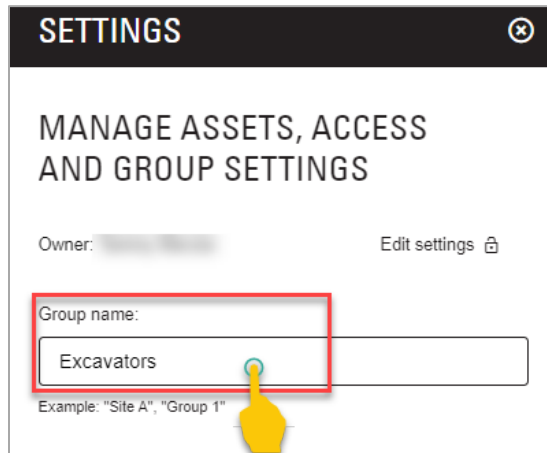

Select Setting to Edit Asset Group

2. **Owner.** Identifies who the owner of the group is. This is <u>not</u> an editable option.

3. **Lock / Unlock the Asset Group.** Located under **Edit Settings**, **toggle** to lock or unlock the group.
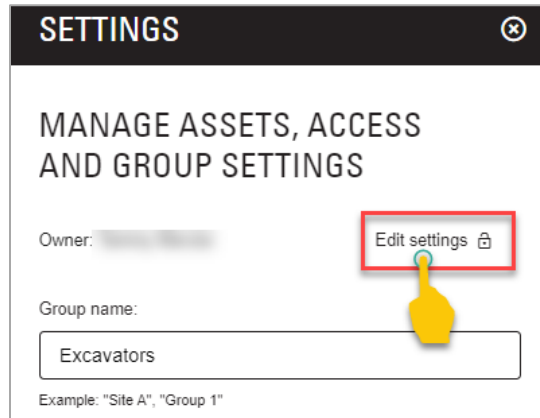
Lock / Unlock the Group

4. **Group Name.** Another way to rename the group. Edit the **Group Name** and click **Save**.

Lock / Unlock the Group

5. **Serial Number.** Add or remove assets (serial numbers) from the group. See Edit an Existing Group – Add or Remove Assets instructions above.

6. **Share Group.** Share groups with other people in the org. See Edit or Remove a Shared Asset Group instructions above.

Troubleshooting

- I selected an asset group to view but no assets are showing.

The filter rules in the other columns of the table are <u>still enforced when an asset group is used</u>. If you select an asset group and see no results check to see if filters are set in any of the other columns. To clear the filters, click the circular X at the top left of the Asset List table.

Circular X Located to Remove Table Filters

- I pre-selected assets but they were not selected when I created the group.

When creating an asset group pre-applied filters are remembered but pre-selection of assets using the check box is not. For example: if you filter to assets with expired warranties and create a new group and add assets with both valid and expired warranties, when you view your group it will only show assets in the group that have expired warranties (because of the filters pre-applied).

- I changed companies but the asset group from my last company still shows but with no assets are showing.

This is a known issue. When a user changes company's and has groups shared from the previous company, the shared group remains in their view but with no asset data.