



Touchstone Mobile Application Asset Management

Role: All Roles

TSMob-WI-0050-Asset Management

Purpose:

This Work Instruction defines the steps for managing assets within the **Touchstone Mobile App**.

Primary Use:

This Work Instruction is used for the following scenarios:

1. Accessing Assets in a Work Order
2. Editing Asset Attributes
3. Adding Attachments to an Asset in a Work Order
4. View and Update Asset Meter Readings
5. Submit a Request for New Asset Creation

Business Unit Application:

This Work Instruction applies to Programmed Facilities Management.

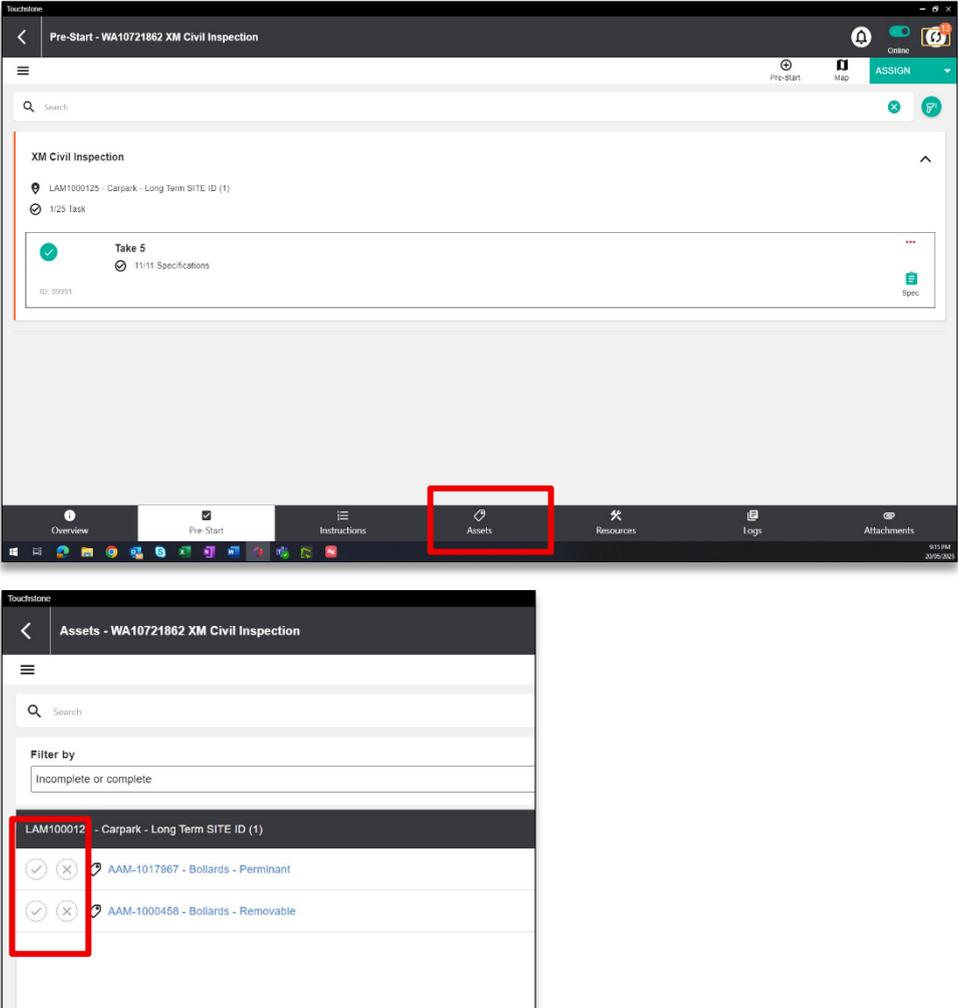
Audience:

Supervisors and Technicians.

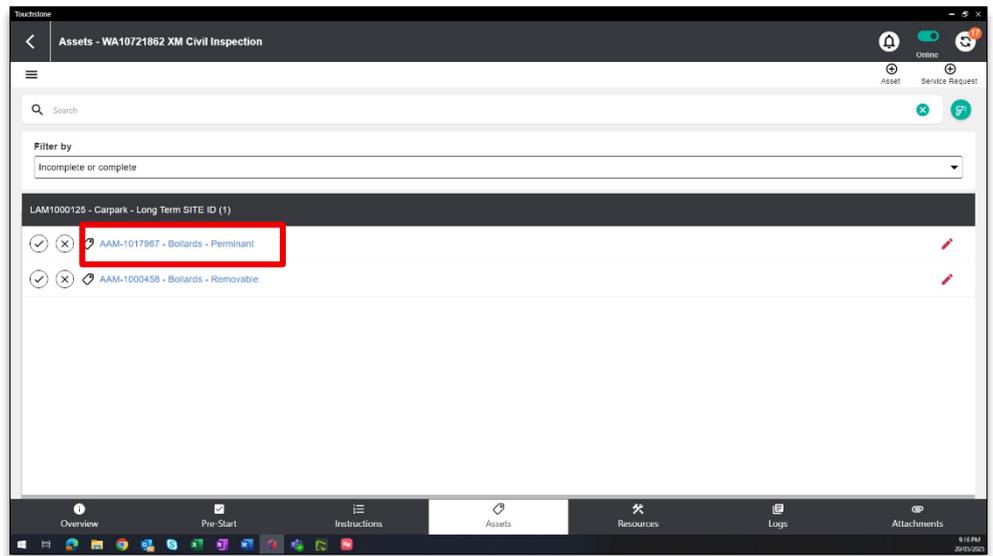
Before you start:

1. Ensure you have the latest version of Touchstone application.
2. WO must be in START status.
3. WO must be open and be of type Preventative Maintenance Work Order.

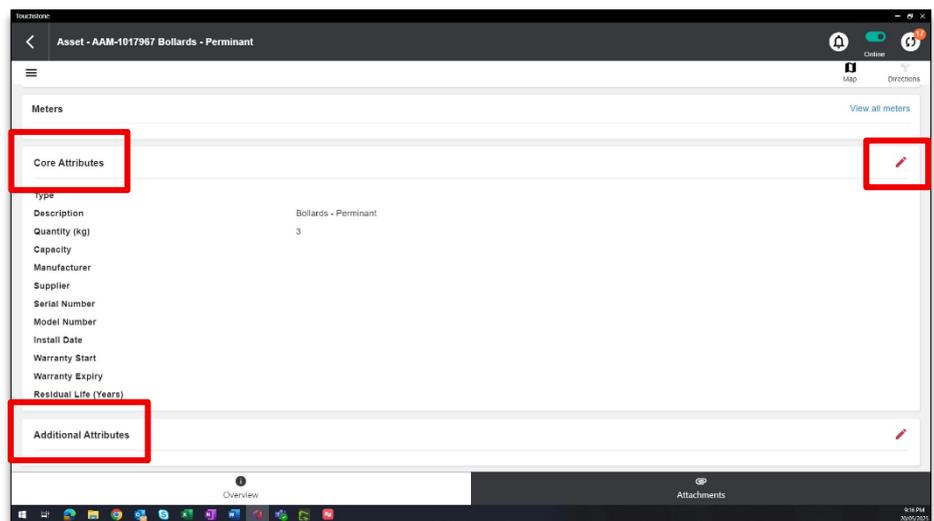
Accessing Assets in a Work Order

Explanation	Screenshot
<p>1. From within the work order, click on Assets.</p> <p>Note – If a Work Order has not been started, the Assets will be locked, and editable functions will be greyed out. To unlock the Assets, you must start the Work Order.</p>	 <p>The top screenshot shows the 'Pre-Start - WA10721862 XM Civil Inspection' screen. The 'Assets' tab in the bottom navigation bar is highlighted with a red box. The screen displays a search bar, a 'Take 5' section with '11/11 Specifications', and a 'Spec' button.</p> <p>The bottom screenshot shows the 'Assets - WA10721862 XM Civil Inspection' screen. The 'Assets' tab in the bottom navigation bar is highlighted with a red box. The screen displays a search bar, a 'Filter by' section with 'Incomplete or complete', and a list of assets. The first three items in the list are highlighted with a red box: 'LAM1000125 - Carpark - Long Term SITE ID (1)', 'AAM-1017967 - Bollards - Perminant', and 'AAM-1000458 - Bollards - Removable'.</p>

2. Double click on the **Asset Name**.

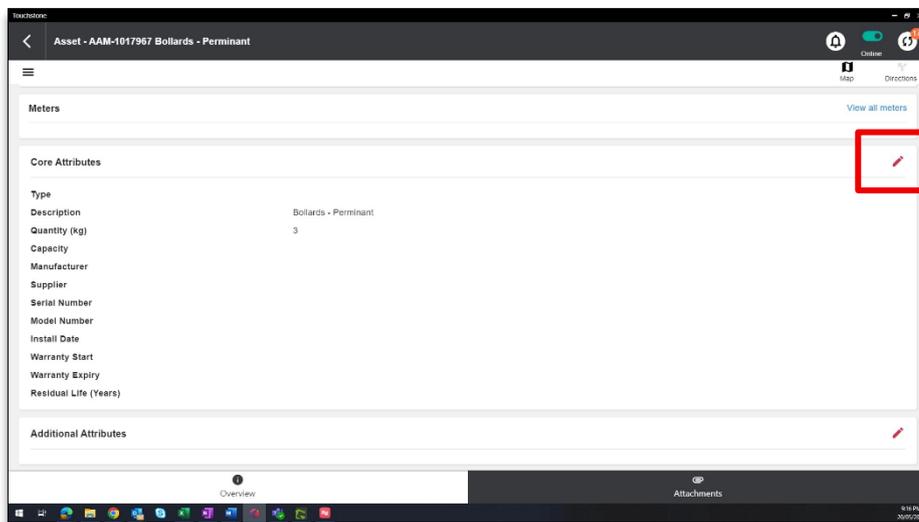


Result: The **Asset Details** are open and displayed on the screen. Scroll down to view more attributes.



Editing Asset Attributes

3. To edit the **Asset Attributes**, click on the **Pencil** icon.

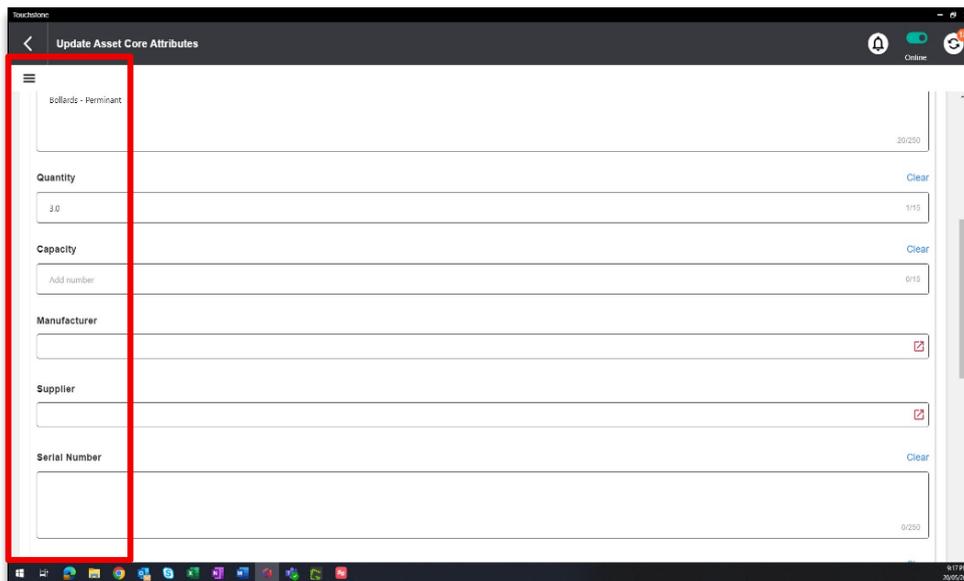


4. The **Asset Attributes** form is opened for editing. Click on the relevant attribute to make any changes or amendments.

Note – many attributes include dropdown menus for selecting from pre-populated options, such as Supplier, Manufacturer, Likelihood of Failure, and Capacity.

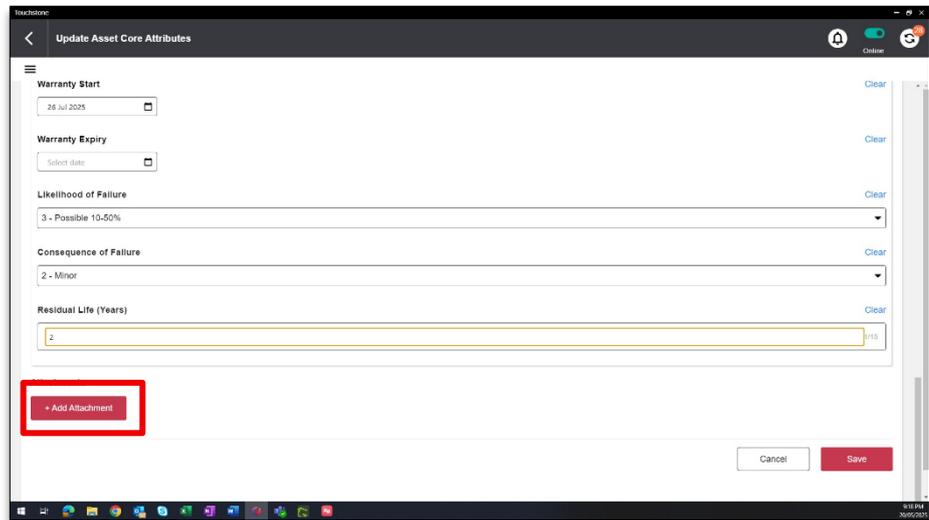
Some fields, such as Serial Number and Model Number are free text fields.

Other fields are date populated, such as Install Date, Warranty Start Date, and Expiry Date, and require a selection from a calendar function.



Adding Attachments to an Asset in a Work Order

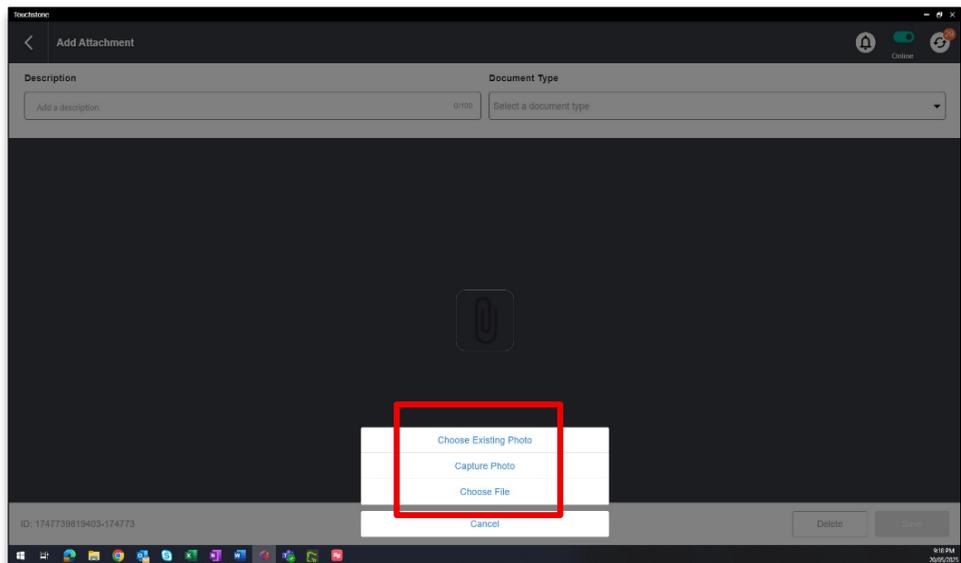
5. To add an attachment to an Asset, click on **Add Attachment**.



6. Select the type of document to be attached.

Selections are:

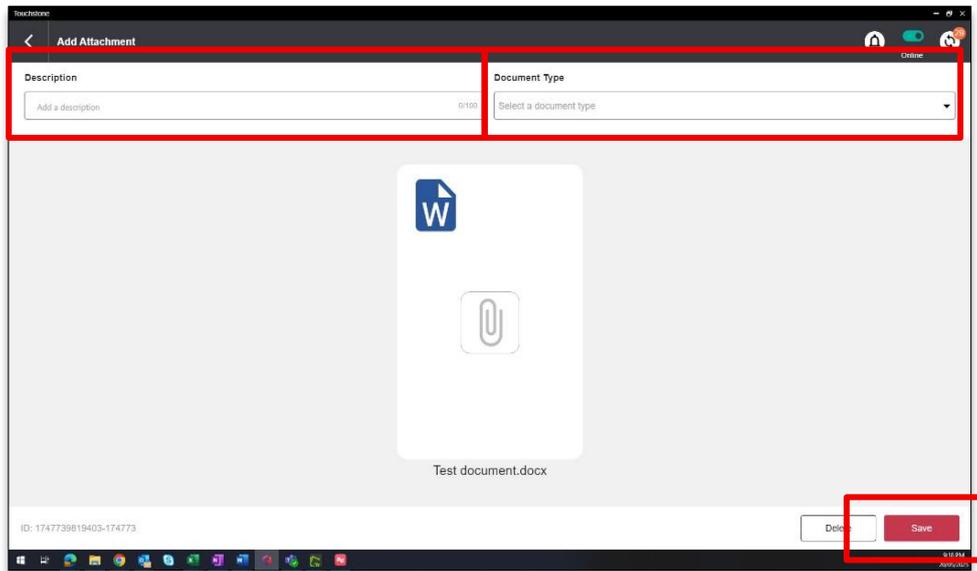
- Existing photo.
- Capture new photo.
- File.



7. Add a **Description** for the document type, and select a **Document Type**.

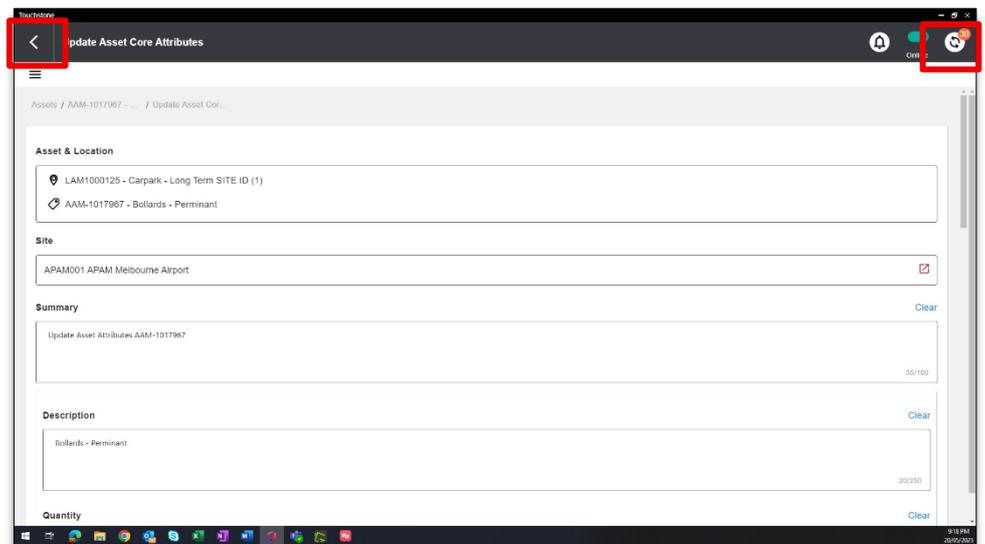
Note – please choose the correct document type, as this field is used in reporting.

8. Once complete, click **Save**.



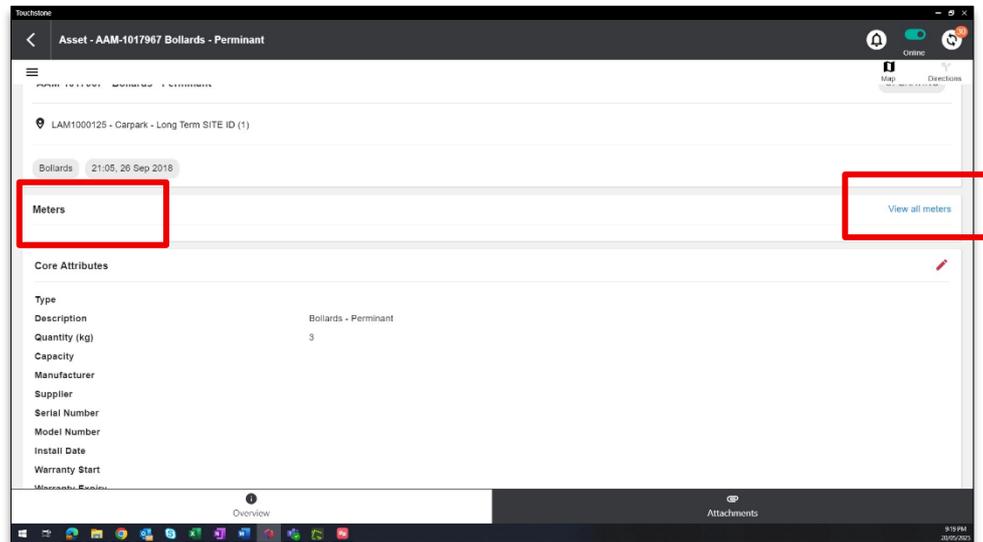
9. Important – Ensure you click **Sync** when making any changes to Assets, otherwise your changes may not be saved.

10. Click the back arrow to return to the **Work Order**.

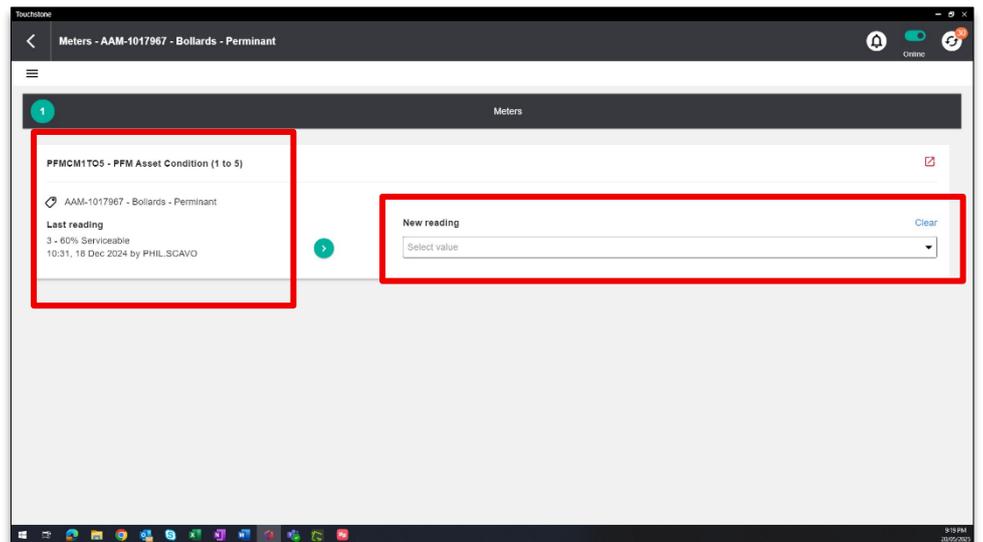


View and Update Asset Meter Readings

11. To View and Update the Asset Meter Reading, click on **Meters > View All Meters**.

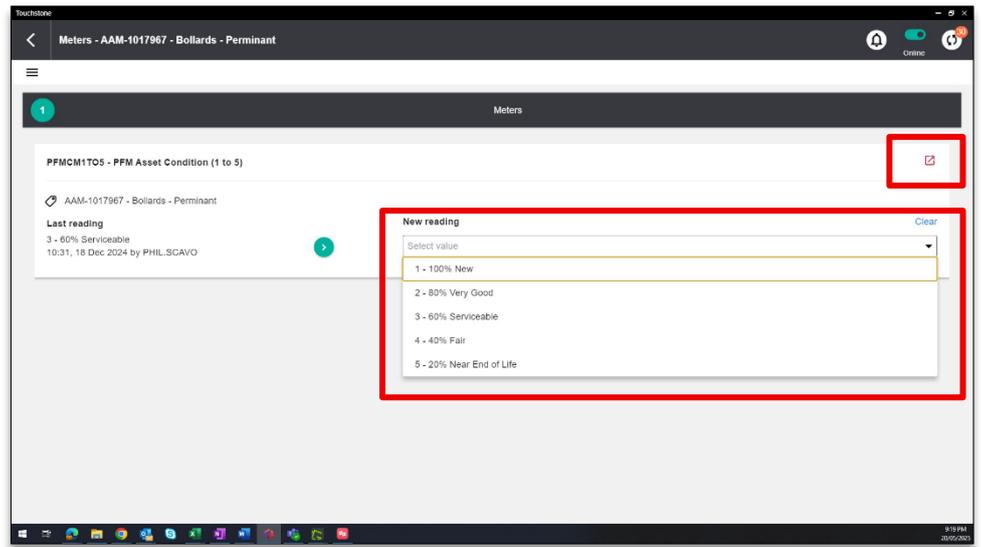


12. The **Last Meter Reading** will be displayed, with an option to update **New Reading**.

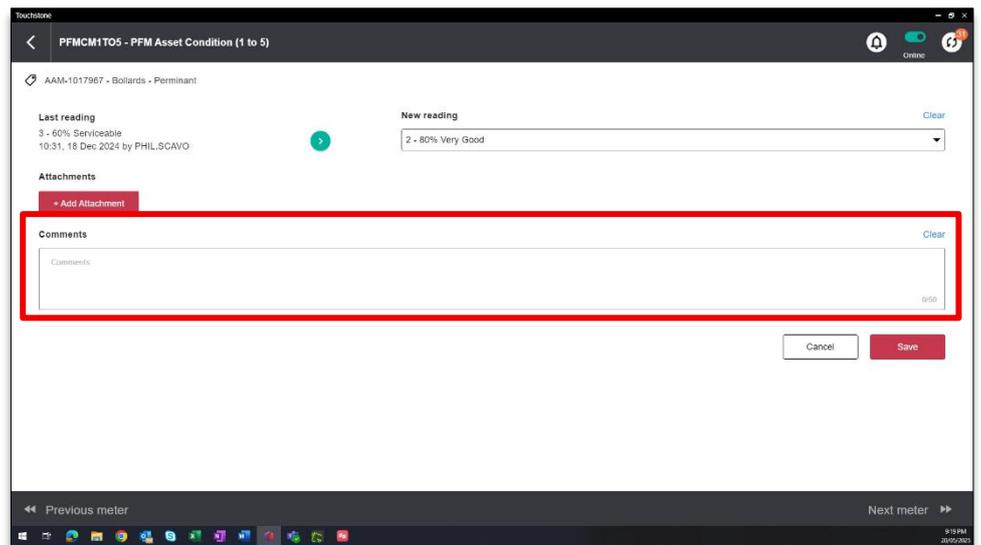


13. Click on the **New Reading** dropdown menu, and select the appropriate option.

14. To add any relevant comments explaining the **New Reading**, click on the **Pencil** icon.

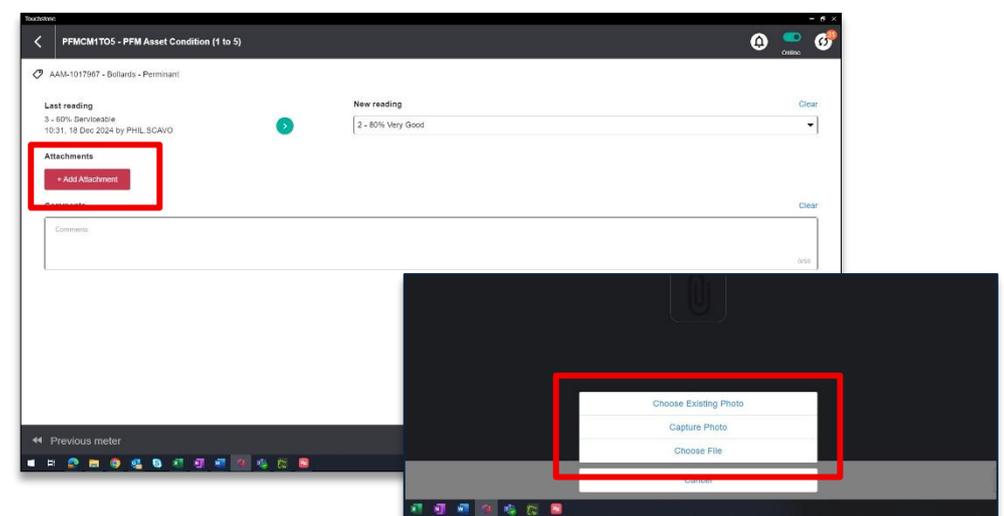


15. Type **Comments** into the Field.



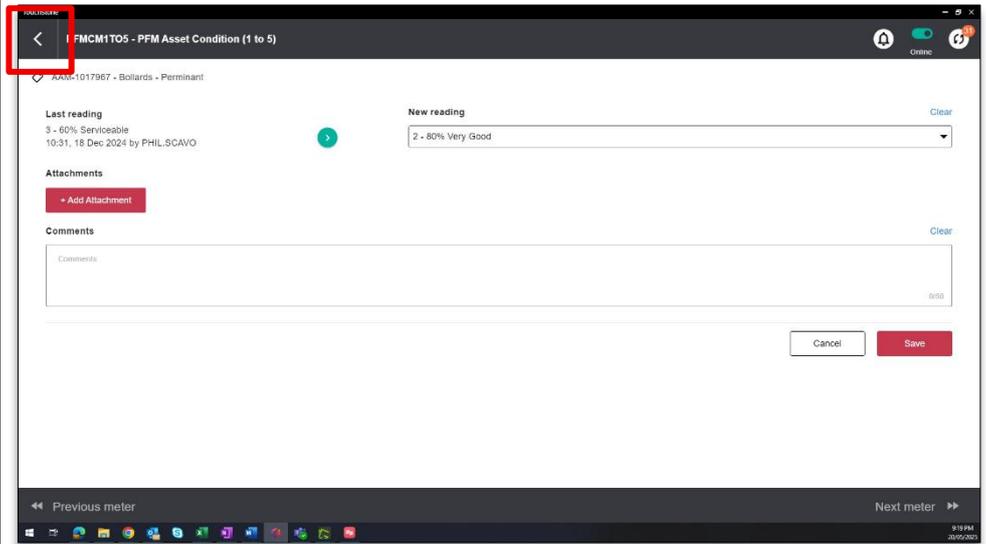
16. Attachments can be added to the Meter Reading by clicking on **Add Attachment**.

17. Select the attachment type, as per Steps 6-8 above.

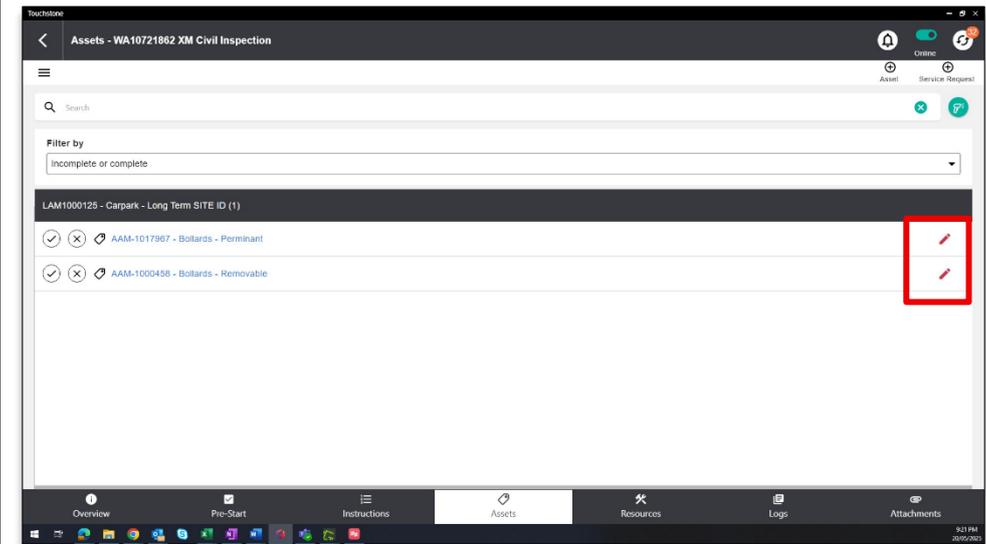


18. Click on the **Back Arrow** to exit the Meter Readings.

19. Click on the **Back Arrow** to exit the **Asset Attributes**.

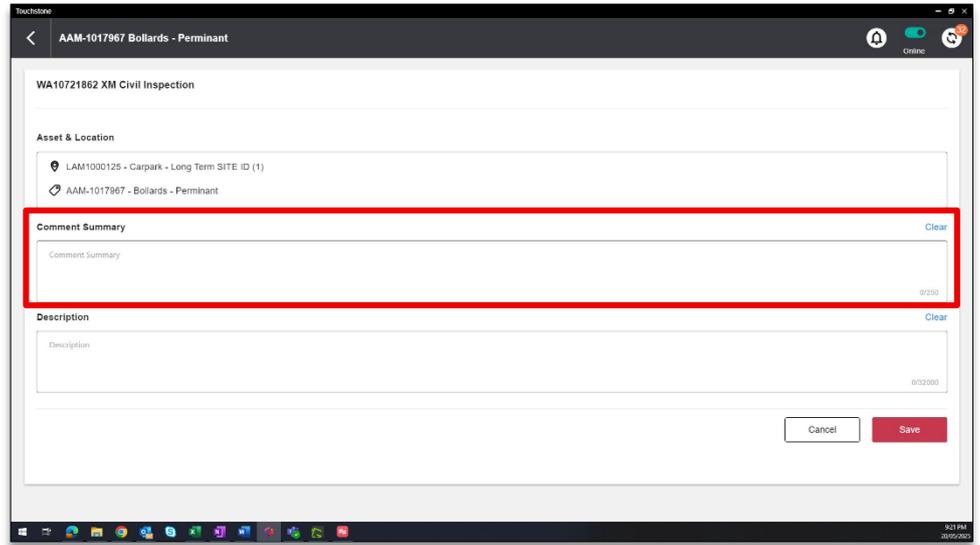


20. To add comments about the **Asset Servicing**, click on **Edit**.



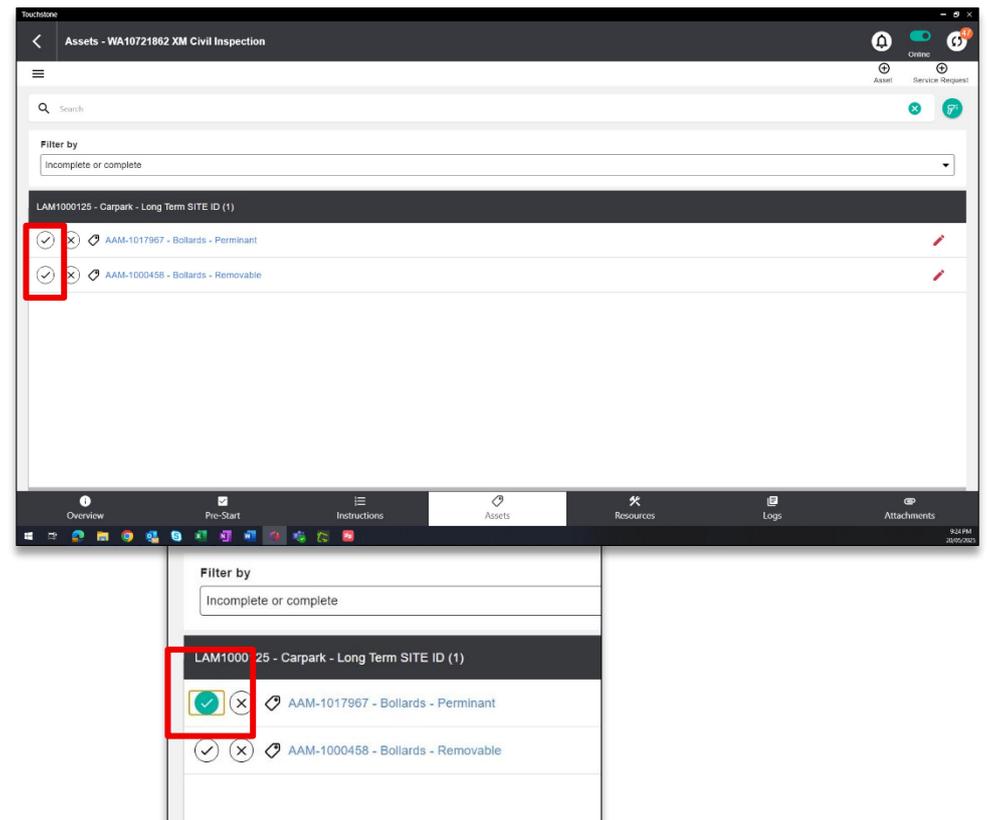
21. Add any **comments** or **descriptions**.

22. When complete, click **Save**.

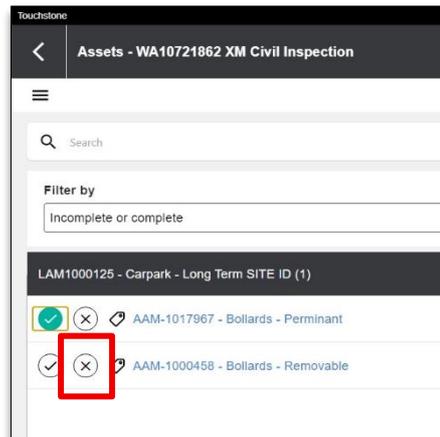


23. To complete the **Service on the Asset**, click the **Tick** checkbox.

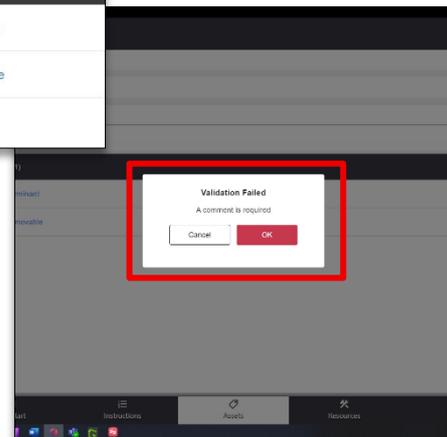
24. The checkbox will turn green when this box has been checked, indicating **Service** completion.



25. To mark an **Asset as invalid or unserviceable**, check the **Cross box**.

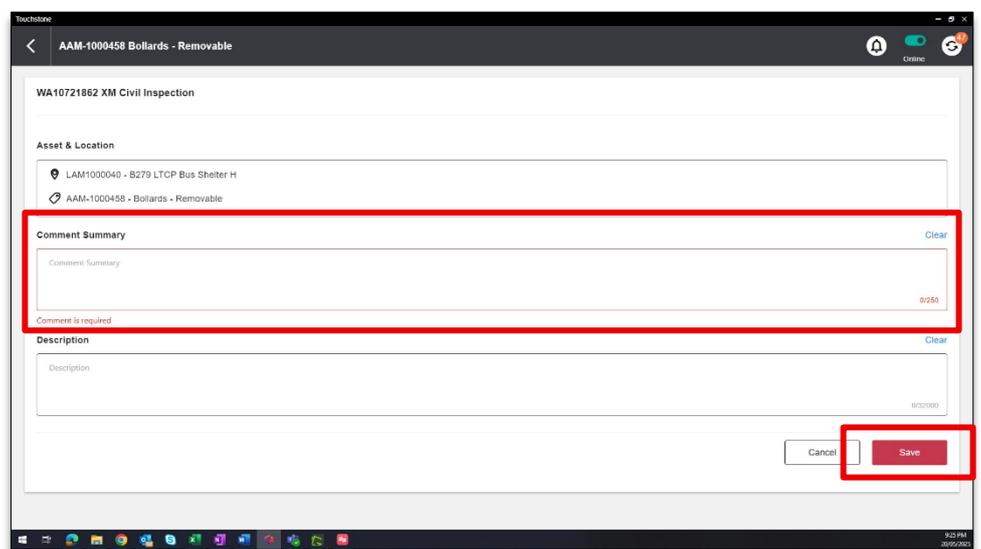


26. The system will ask for validation of the **Asset** being invalid or unserviceable. Click **OK** to **enter mandatory comments**.



27. Enter mandatory **Comments** and click **Save**.

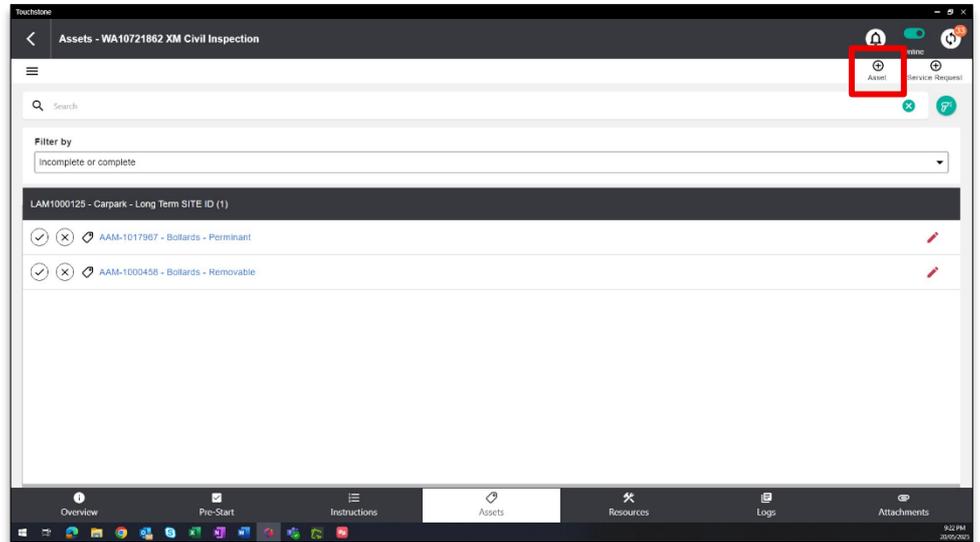
Results: The Asset is updated.



Submit a Request for New Asset Creation

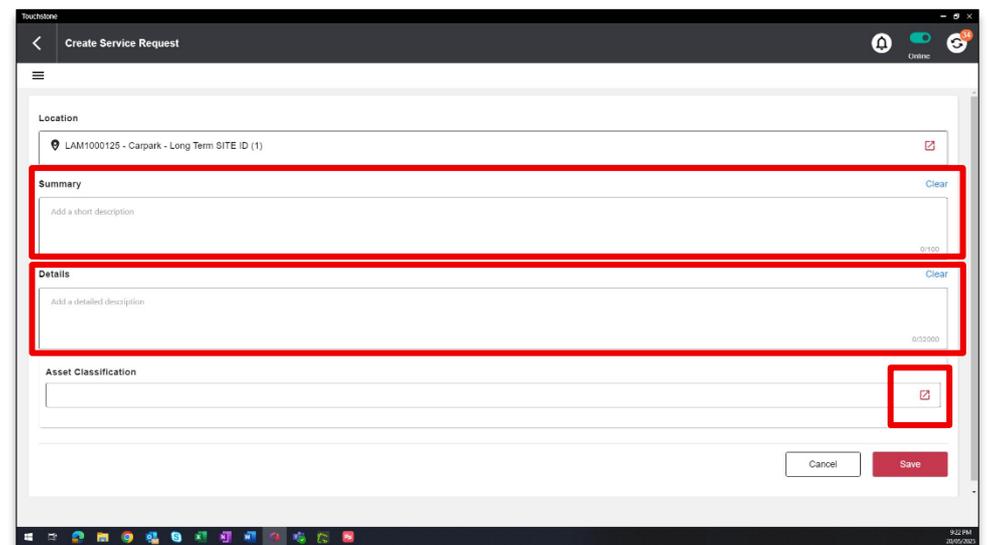
If you locate a new asset, on the work order, you can submit a request for new asset creation via touchstone on the Work Order itself.

28. Click on **+Asset**.

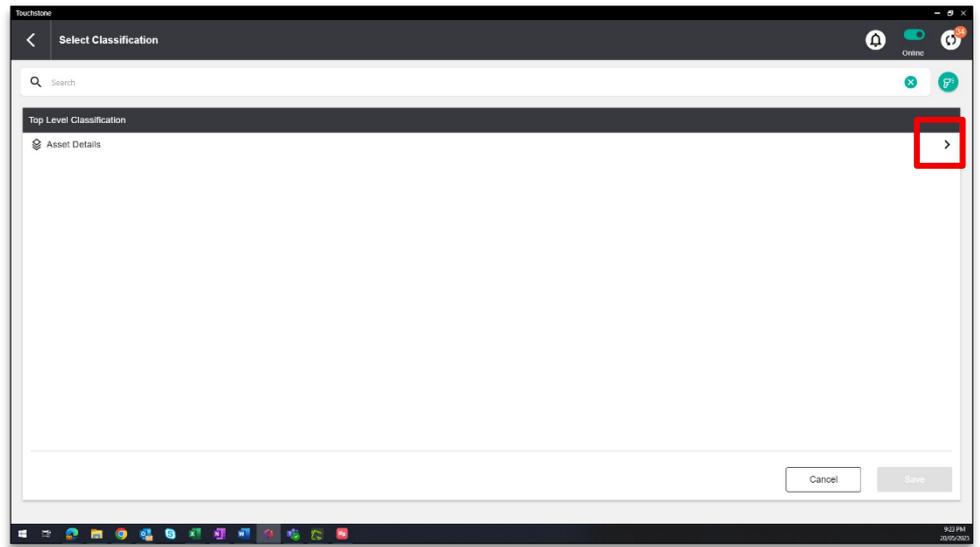


29. Enter a **Summary** including the background and the details of the **new asset**.

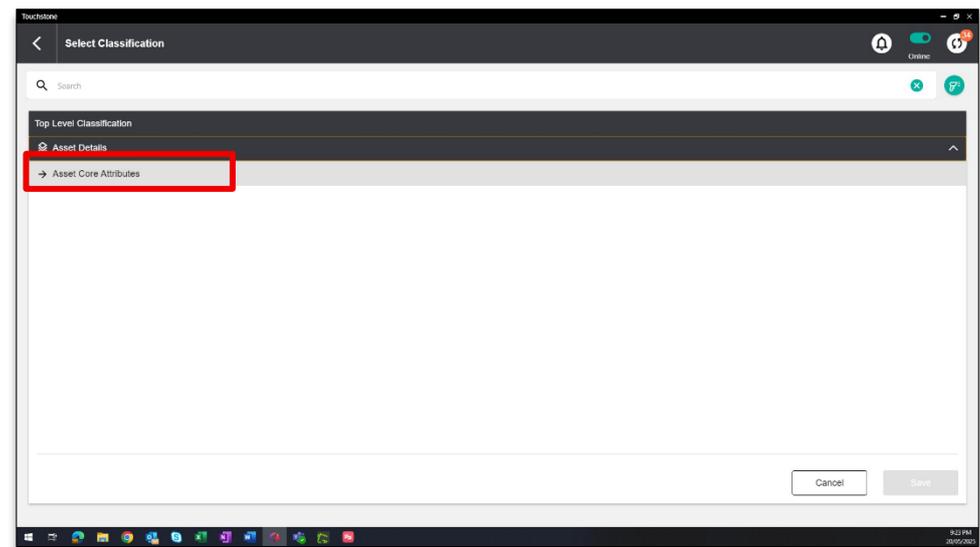
30. Add the **Asset Classification** by clicking on the icon.



31. Click on the Asset Details to add information.

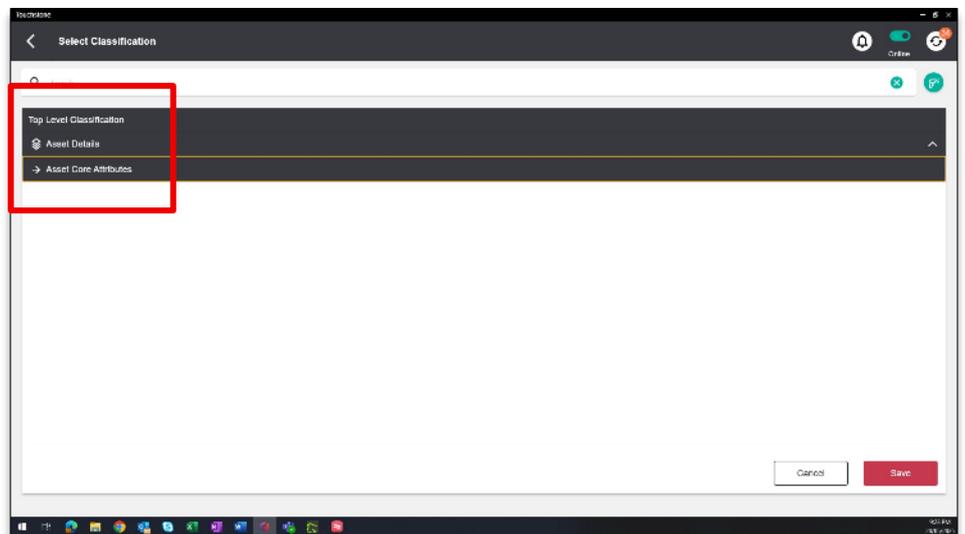


32. Click on the **Asset Core Attributes**.



33. Click on **Save**.

This will lead to the **Asset Core Attribute** form for **New Assets**.



34. Enter details for the **New Asset**.

Scroll down for further fields.

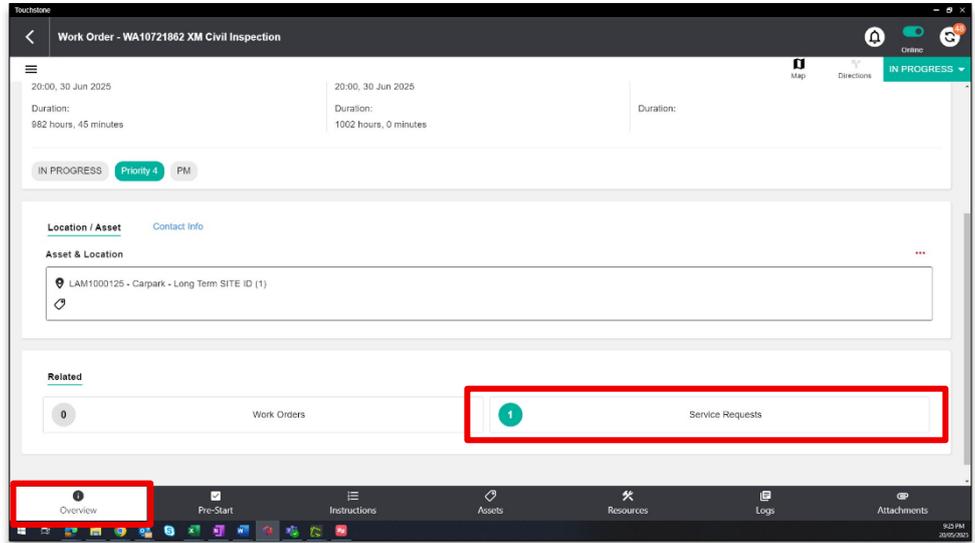
Add as many details as possible.

The screenshot shows the 'Create Service Request' form in a mobile application. The form includes fields for 'File Asset', 'Asset Classification', 'Asset Core Attributes', 'Description', 'Quantity', 'Capacity', and 'Manufacturer'. The 'Description' field is highlighted with a red rectangular box. The 'Quantity' and 'Capacity' fields have 'Add number' buttons. The 'File Asset' field has a date '19/02/2025'. The 'Asset Core Attributes' field has a checkmark icon. The 'Description' field has a 'Clear' button. The 'Quantity' field has a 'Clear' button. The 'Capacity' field has a 'Clear' button. The 'Manufacturer' field has a checkmark icon. The bottom of the screen shows a Windows taskbar with various application icons and the system clock showing 5:11 PM on 26/02/2025.

35. Once all mandatory information has been entered, click **Save**.

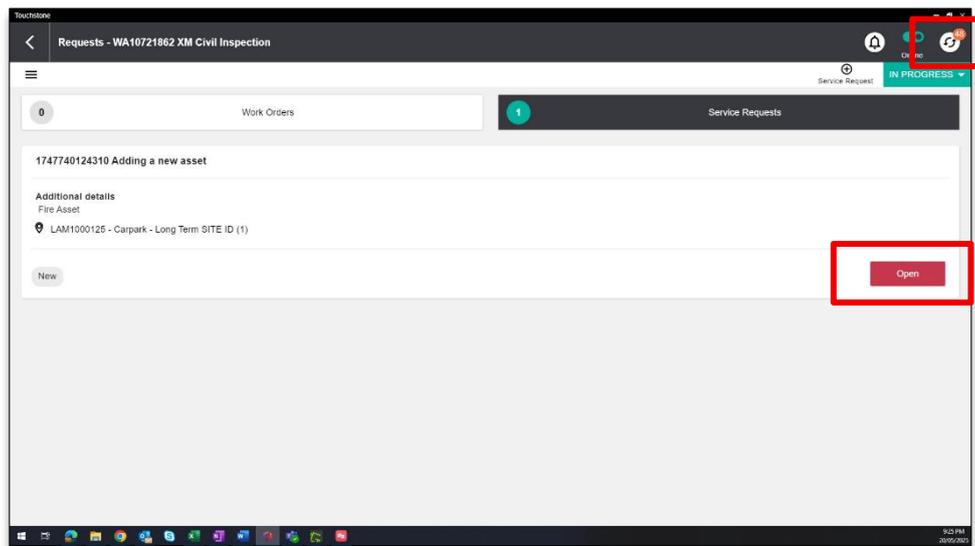
The screenshot shows the 'Create Service Request' form in a mobile application, showing the bottom section. The form includes fields for 'Install Date', 'Warranty Start', 'Warranty Expiry', 'Likelihood of Failure', 'Consequence of Failure', and 'Residual Life (Years)'. The 'Install Date' field has a date '01 May 2025'. The 'Warranty Start' field has a date '20 May 2025'. The 'Warranty Expiry' field has a date '28 Oct 2026'. The 'Likelihood of Failure' field has a dropdown menu with '2 - Unlikely 1-10%'. The 'Consequence of Failure' field has a dropdown menu with '1 - Insignificant'. The 'Residual Life (Years)' field has a text input field with '1'. The bottom of the screen shows a Windows taskbar with various application icons and the system clock showing 5:11 PM on 26/02/2025. The 'Save' button is highlighted with a red rectangular box.

36. To view the New Asset Service Request, click on **Overview**, then click on Service Requests.



37. Click **Open** to view or edit the request.

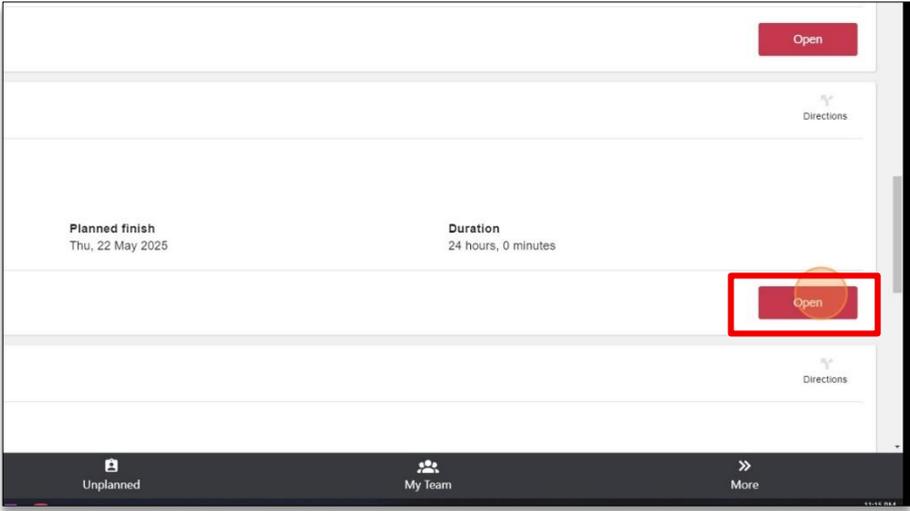
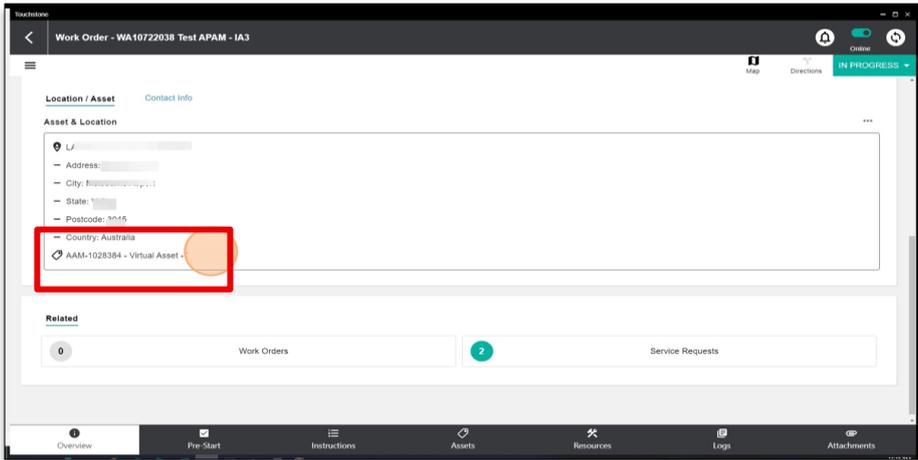
38. If making any changes, ensure you click **Sync** to save your changes.



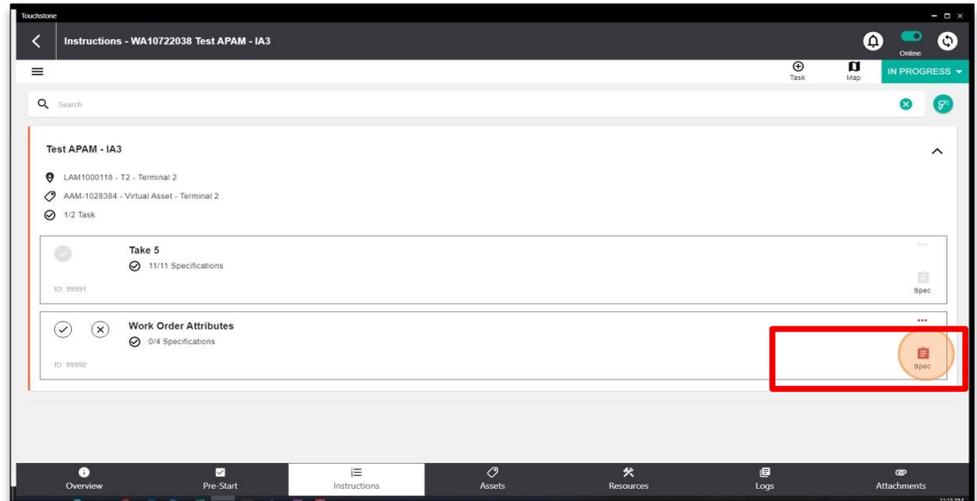
Before you start:

4. Ensure you have the latest version of Touchstone application.
5. WO must be in START status.
6. WO must be open and of type Reactive Work Order.
7. Assets must have correctly aligned barcode numbers in MAS

Accessing Assets in a Work Order

Explanation	Screenshot
<p>Note – If your contract allocates, asset in Reactive work order - technician/supervisor can view the asset in work order in "Overview" tab and update the condition meter reading</p> <p>39. Open the Work Order</p>	
<p>40. In "Overview" tab, under "Asset & Location" the asset which was attached on the work order is available</p>	

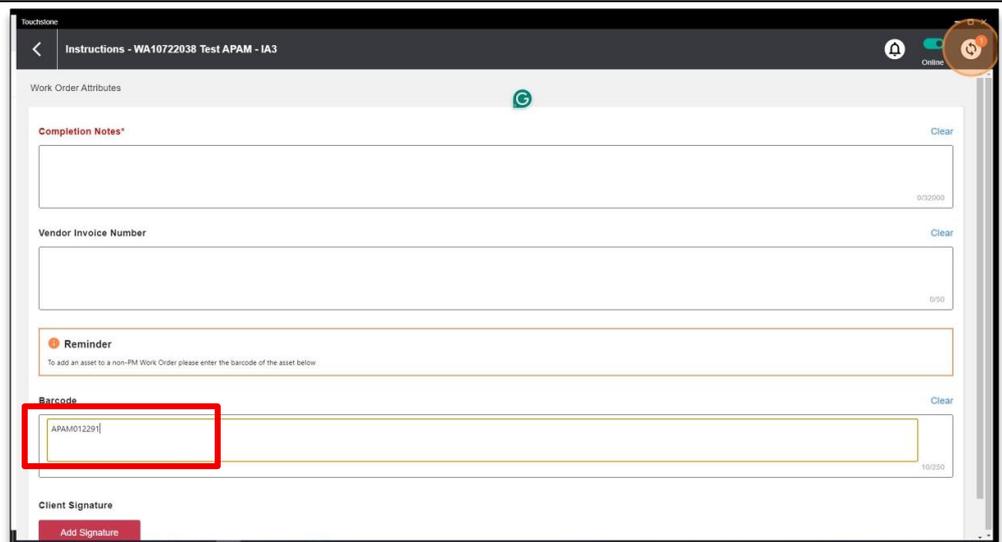
41. If you wish to update the asset on the work order and if you have the correct barcode available for the asset, you can update it in "Instructions" tab under "Work Order Attributes" Click on "Spec"



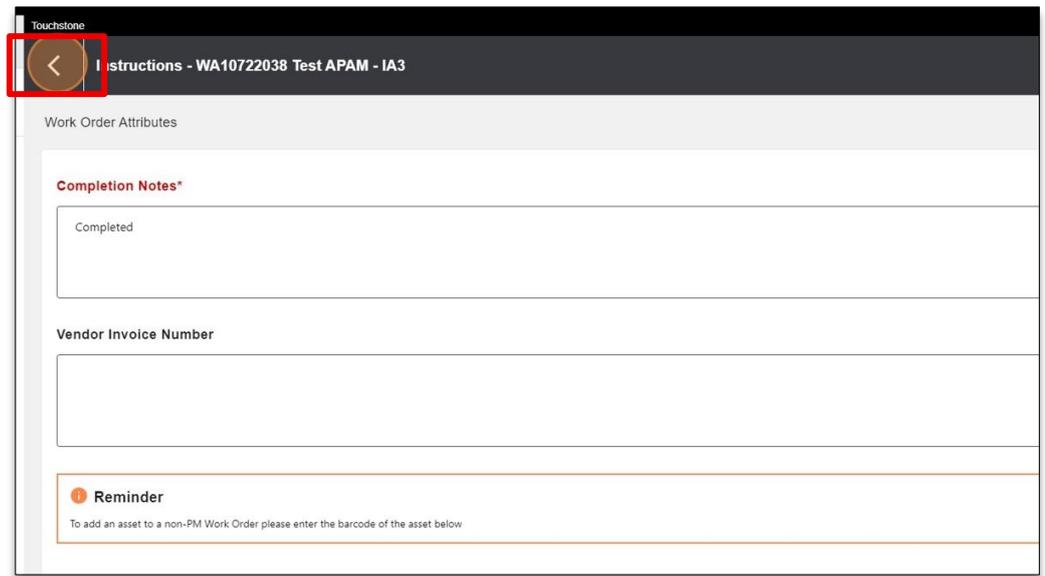
42. Scroll to "Barcode" section



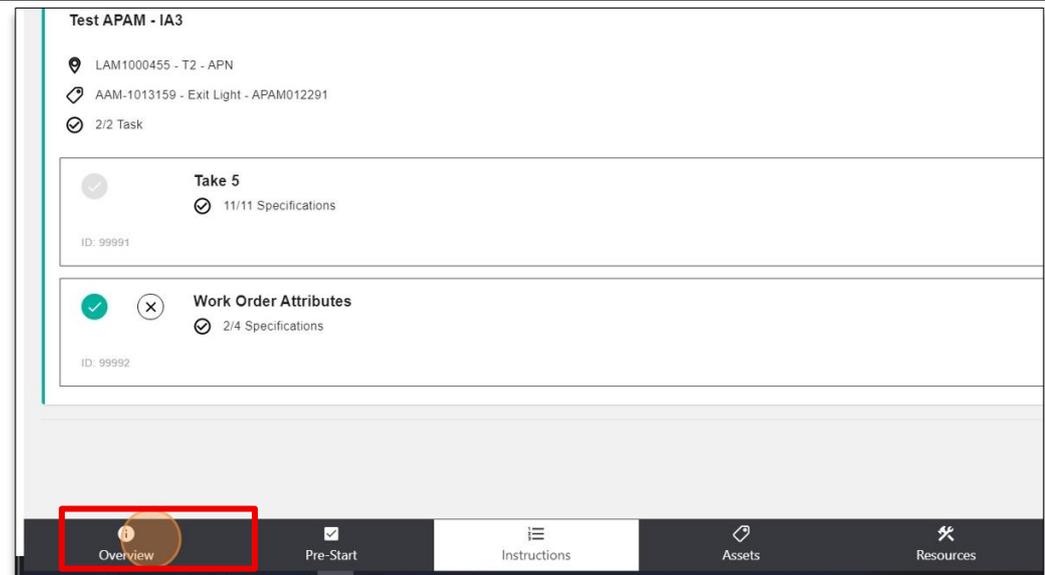
43. Add the barcode number in "Barcode" and "Sync"



44. Click < back arrow

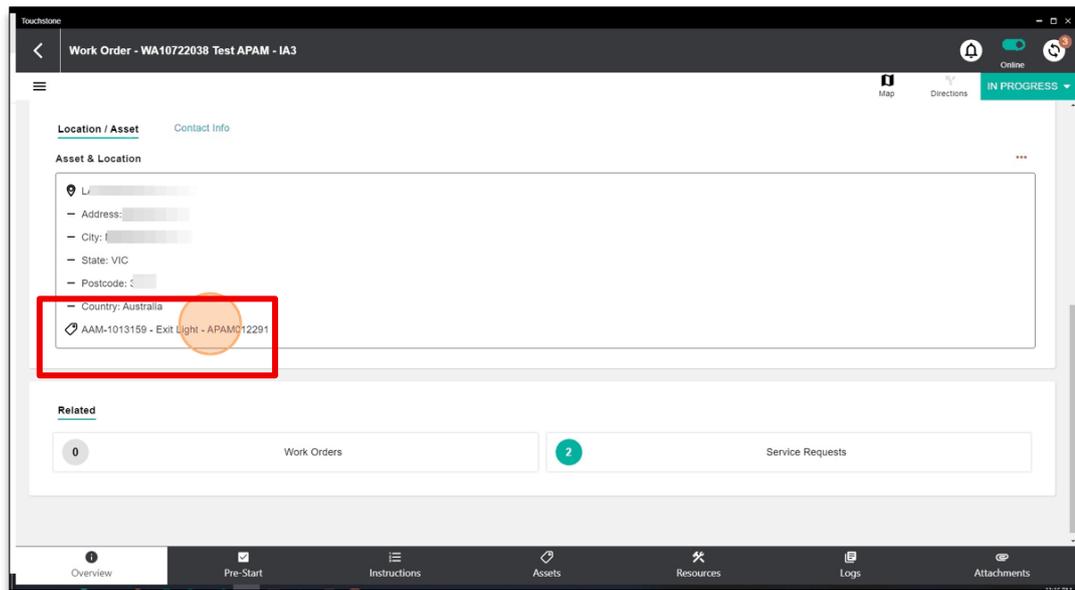


45. Click "Overview" tab



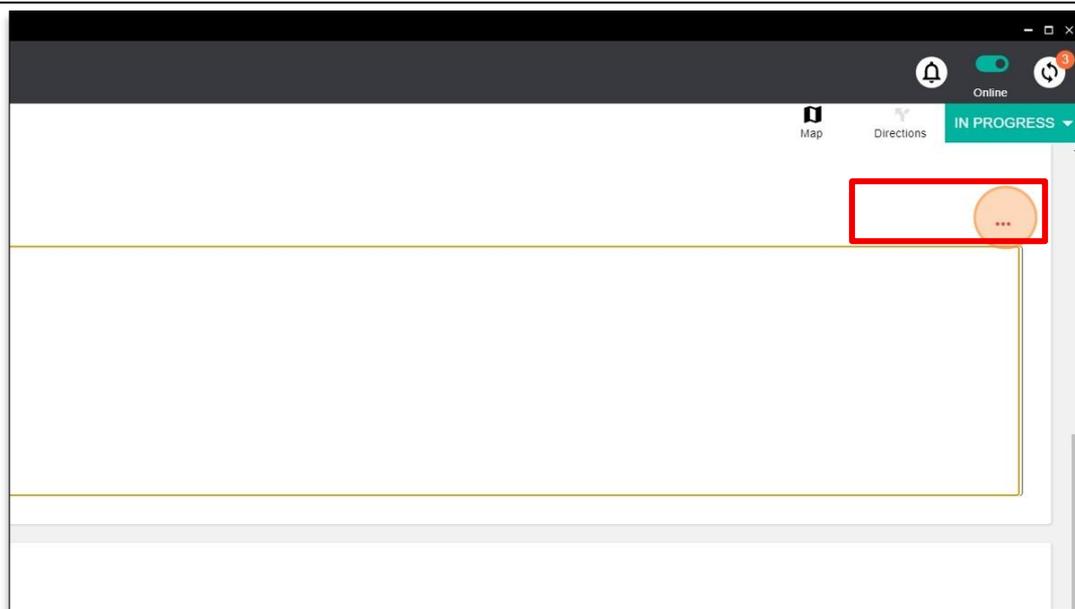
46. Under the "**Asset & Location**," your asset is updated with the corresponding asset number for which you added the barcode number.

Note – The barcode number will include **\$P1** at the beginning. You can disregard this, as it's simply a hidden prefix used by the system for processing purposes.



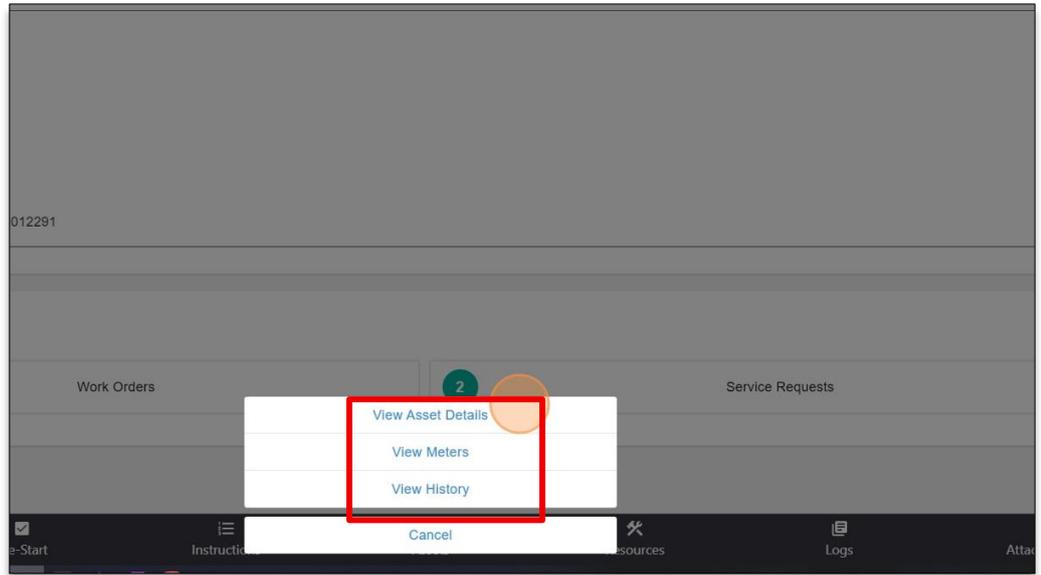
47. You can "**view and update**" the asset. Click on three dots on right

Note – This step can be performed even on the original asset, if you haven't changed it via the steps above

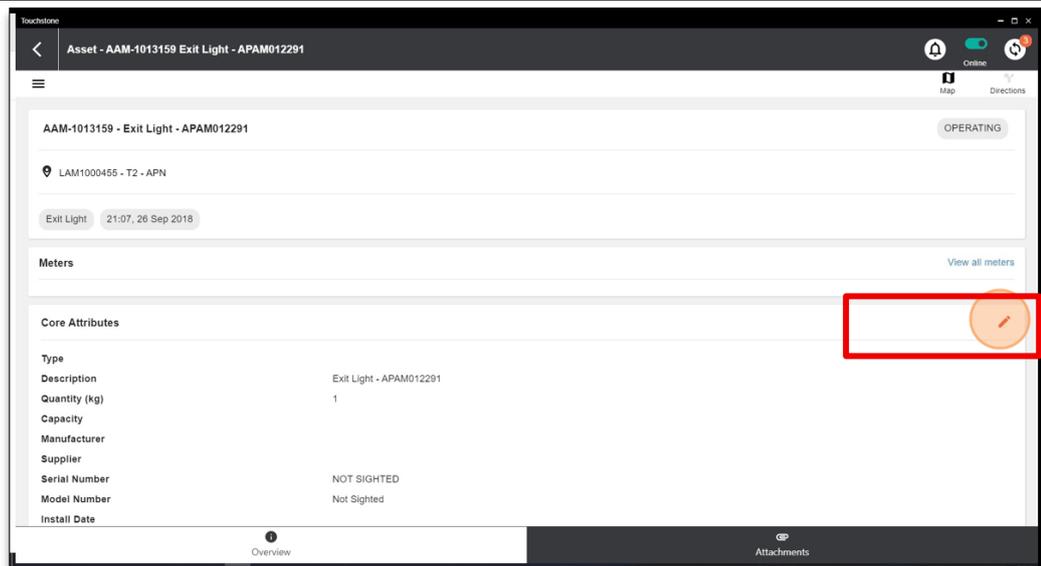


48. It will give you the below options

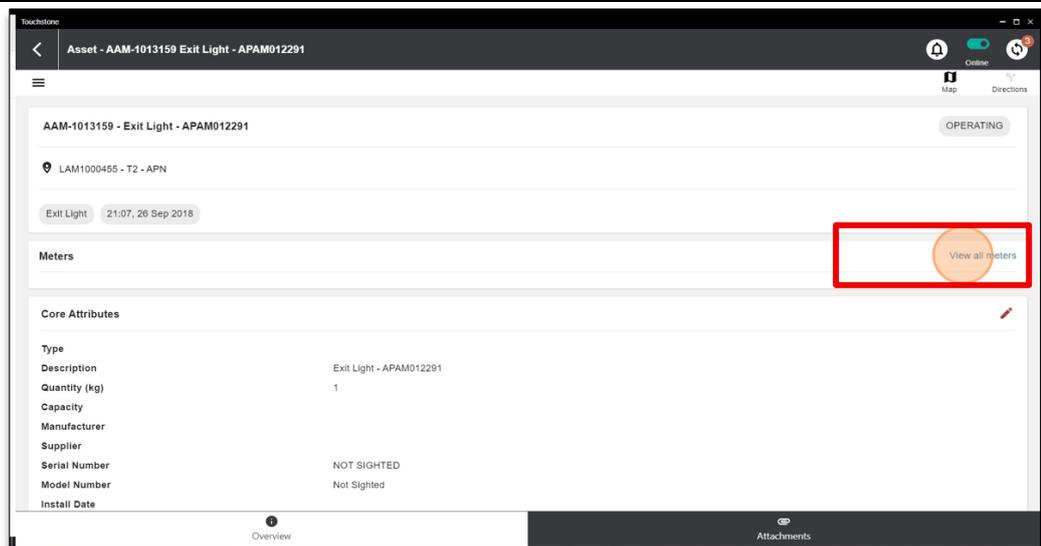
- "View Asset Details"**
- "View Meters"**
- "View History"**



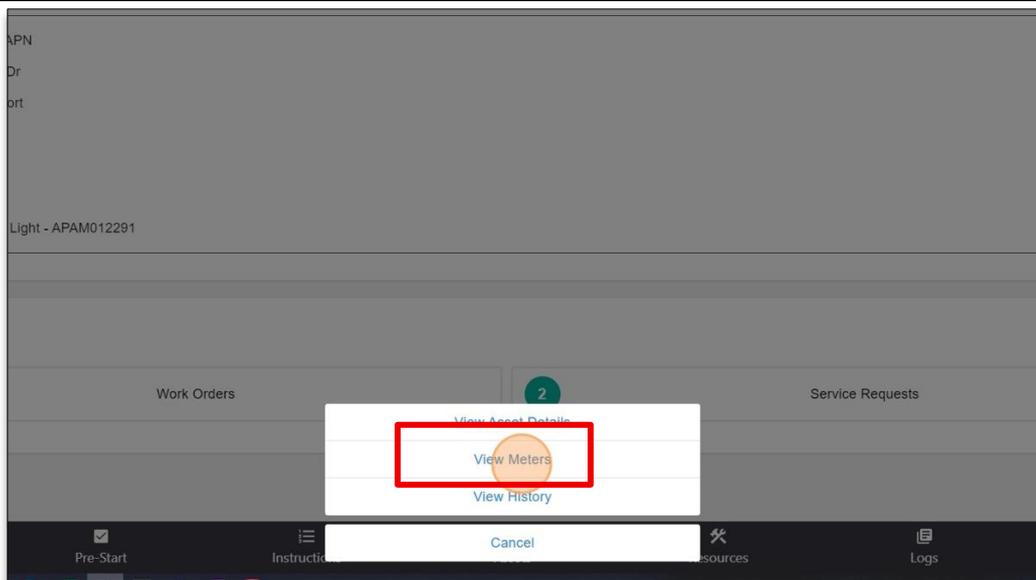
49. Click **"View Asset Details"**, it takes you to asset details with core attributes, if you want to update the core attributes click on "red pencil" icon and follow steps 3-10



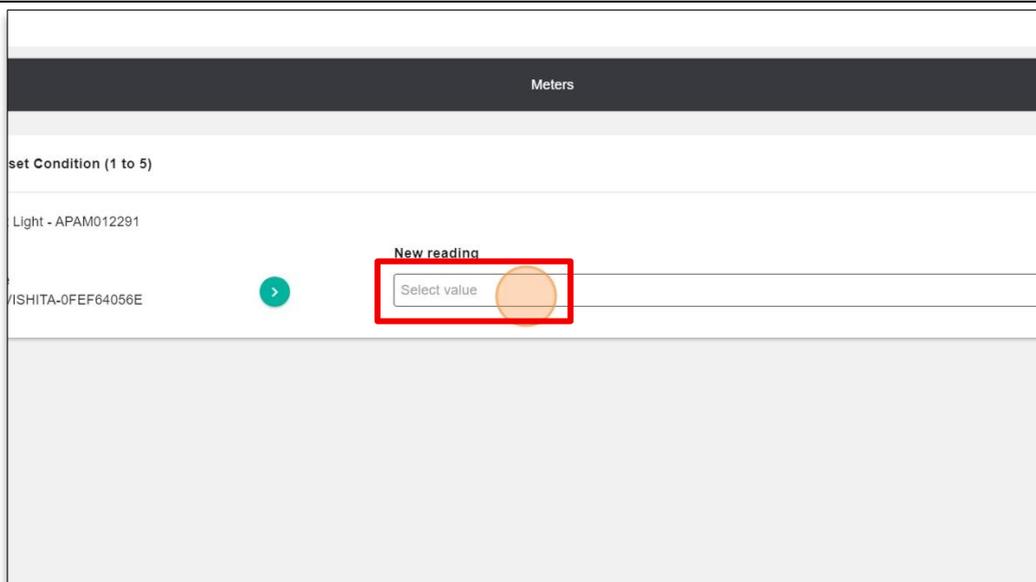
50. To view/update the **"Meter Reading"** you can either click on **"View all meter"** on this page



51. Or in options select "**View Meters**"



52. Click "**Select Value**" under "**New Reading**"



53. Choose relevant value

Asset Condition (1 to 5)

Exit Light - APAM012291

Life
by VISHITA-0FEF64056E

New reading

Select value

- 1 - 100% New
- 2 - 80% Very Good
- 3 - 60% Serviceable
- 4 - 40% Fair
- 5 - 20% Near End of Life

54. To add any comments, click on "Red Icon"

IN PROGRESS

Meters

New reading

5 - 20% Near End of Life

Clear

55. Add "attachments/comments"

Last reading
5 - 20% Near End of Life
15:52, 21 May 2025 by VISHITA-0FEF64056E

New reading
5 - 20% Near End of Life

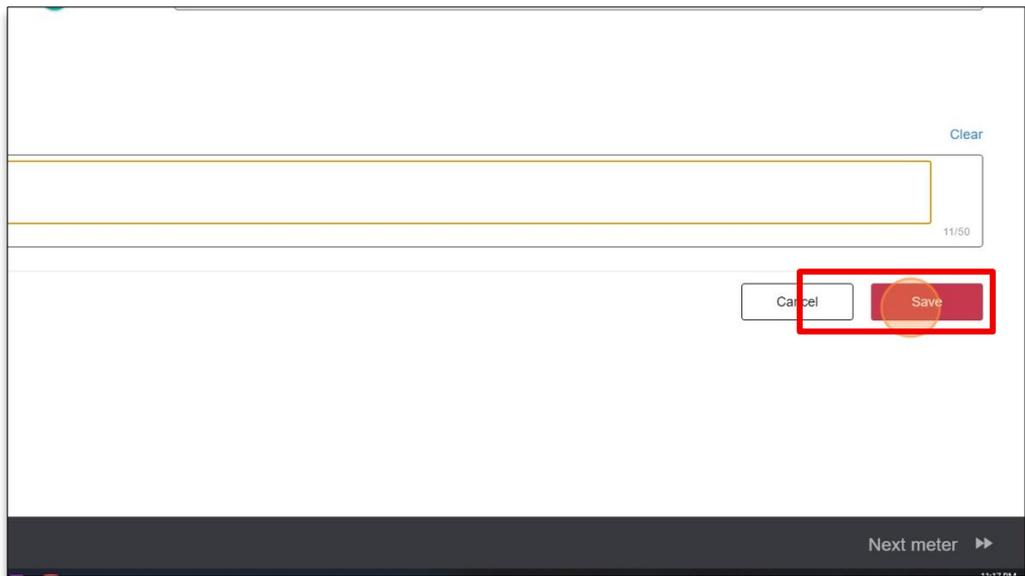
Attachments

+ Add Attachment

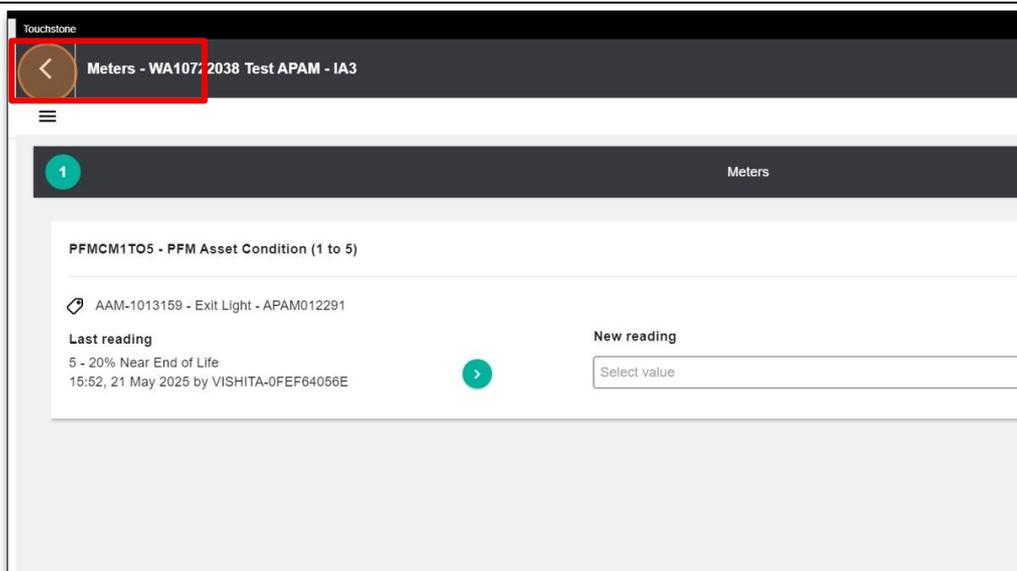
Comments

Comments

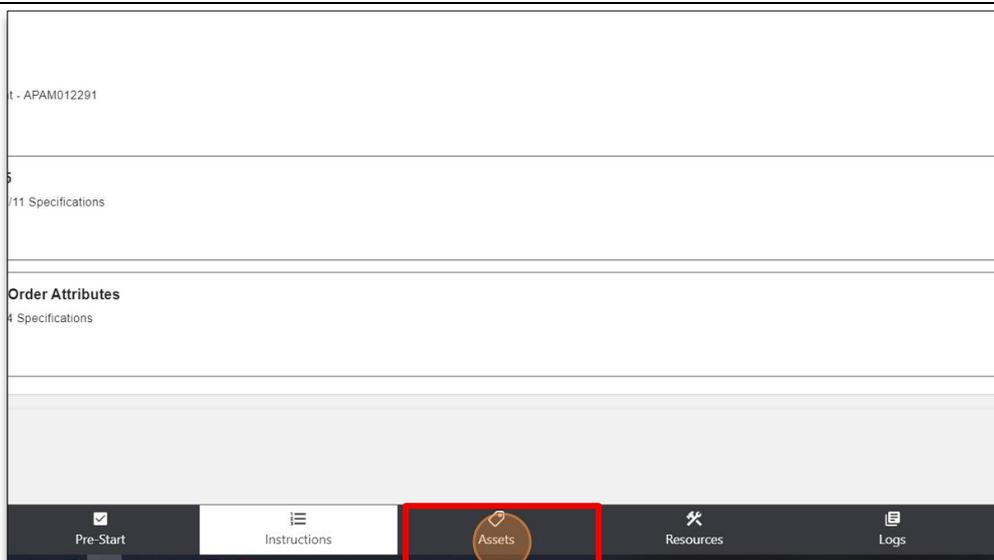
56. Click "Save"



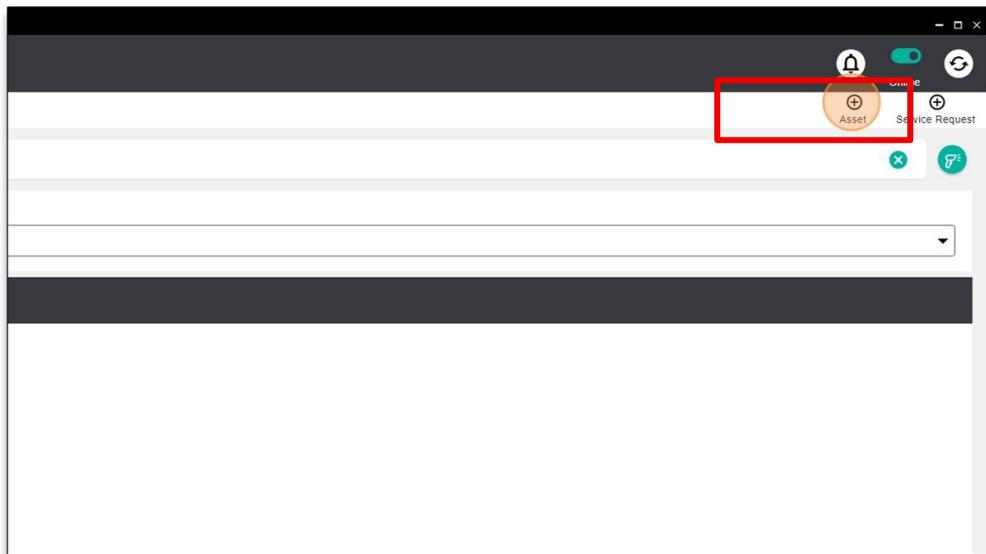
57. Click < back arrow



58. To add new asset, click on "Asset" tab



59. Click "+ Assets" icon, and submit a new asset request for approval by following steps 28-38



Related Work Instructions or Process Maps:

- VUM-WI-0010-External User Management
- VUM-WI-0020-Activating & Downloading the Touchstone Mobile Application
- VUM-WI-0030-PFM User Management
- TSMob-WI-0010- Navigation & Overview
- TSMob-WI-0020- Work Order Management (Supervisors)
- TSMob-WI-0030-Work Orders (Technicians)
- TSMob-WI-0040-Create and Submit Claims

History			
Description	Reference #	Date	Authority / WI Owner
New Work Instruction		19 th May 2025	Programmed Facility Management
Next Review Due		Upon new release	