

Groups & Records

Query – How to Add a record?

Adding a record to a group in your system is a straightforward process that involves a few key steps. To commence this musical journey of data entry, first, identify the group where you intend to place the new record. This can be achieved either by selecting the group from your list of favourites or by navigating to the Groups menu. Once you've chosen the desired group, click on the "Add New" option to initiate the record addition process.

Now, onto the creative part – entering the record details. In this example, we'll consider the Assets group, but keep in mind that the process may vary slightly depending on the group. Every group will have unique options for adding a record, but the common thread is the necessity to input information. A user-friendly interface will guide you through this step, ensuring that you provide essential details for your new record. Be mindful of fields marked with an asterisk (*) as they denote required information.

As you embark on this creative process, feel free to let your imagination flow within the bounds of the data you're inputting. The system encourages a flexible and enjoyable experience while ensuring you capture the necessary information accurately. Once you've input all the desired details, click the "Save" button, and like magic, your new record comes into existence within the chosen group.

Query - How to view a Record?

There are a couple of flexible ways to navigate and view records, allowing you the freedom to choose what suits you best. Asset Panda, being a fan of choices, provides you with options to tailor your experience. The initial step is to identify the group that houses the specific record you wish to explore. This can be achieved in two ways:

Groups Menu: Head to the Groups menu and choose the relevant group from the list.

Let's say, for instance, you opt for the Employees group.

Selecting the Record: Once you've landed in the desired group, the next step is to select the specific record you want to review

It's worth highlighting that these steps remain consistent across all groups, ensuring a standardized and user-friendly experience. While the specific records may differ based on the group's focus, the process of selecting, viewing, and exploring them remains uniform.

Congratulations! You've successfully learned how to view records in Asset Panda. Whether you're assessing employee records or exploring data in other groups, this versatile approach caters to your preferences, providing a seamless and efficient way to access and appreciate the information contained within your records.

Query - How to track a Record?

The significance of records cannot be overstated, and in the context of Asset Panda, we take pride in providing an effortless and efficient solution to track and manage them. If you wish to monitor the users responsible for creating specific records, adding a User Stamp field to your group is a straightforward

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process. Whether you're enhancing an existing group or creating a new one, the steps remain consistent. Here's how to seamlessly integrate a User Stamp field into your group settings:

1. Begin by clicking on the settings icon and selecting "Group Settings."
2. Within Group Settings, click on the "Edit" link for the group you intend to modify. Scroll down to the Fields section.
3. To introduce the User Stamp field, click on "Add New Field."
4. Choose "User Stamp" as the field type.
5. In the "Update When" drop-down menu, select the option that aligns with your requirements:
 - "New Record": This option automatically captures the user stamp of the individual creating the record.
 - "New Record and Field Updates": This option captures the user stamp of the record creator and updates based on the user who last modified any fields within the record, whether through manual changes or actions.
6. After configuring the field options, click "Save and Close" to finalize the creation of the new User Stamp field.

These steps empower you to effortlessly track user information associated with record creation, ensuring transparency and accountability within your organization.

Now, if you prefer a more hands-on approach, Asset Panda allows you to manually add records, providing flexibility in your data entry process. Here's a quick guide to manually adding one or multiple records:

1. Navigate to the Groups menu and select your desired group. For this example, we've chosen the Assets group, but feel free to select any group that suits your needs.
2. Click on "Add New" to initiate the manual record creation process.
3. Enter the relevant information for the record.
4. Click "Save," ensuring that all required fields (indicated by an asterisk (*)) are completed before the system allows you to save.

These straightforward steps empower users to tailor their record-keeping process to their specific needs, whether it involves automated user stamp tracking or hands-on manual record creation. Asset Panda ensures a user-friendly experience, making it a reliable ally in managing and tracking records efficiently.

Query - How to archive Records?

Now that we've delved into the topic of archiving extensively, let's demystify the process and explore how to archive records in a few simple steps:

1. Begin by navigating to the specific group where you wish to perform the archiving process. For our example, we'll use the Assets group.
2. Once in the group, identify and select the records you intend to archive. This could involve choosing multiple records to streamline the process.
3. Click on the ellipses icon (depicted as three dots) to reveal a dropdown menu, and then select "Archive/Activate."
4. A subsequent option to "Archive" will appear. Click on it to initiate the archiving process.

At this point, a magical prompt materializes, requesting the entry of the Depreciation/Inflation Stop Date. It's here that you specify the date, providing a dynamic element to the archiving process.

4.1 Enter the desired date, and then proceed to click on "Archive."

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The process is as simple as that—your selected records are now securely archived. It's worth marveling at the ease and efficiency of this feature.

Query - How to Unarchive Records?

Fear not; we've got you covered with a straightforward guide on viewing archived records:

1. Navigate back to the group where you stored your archived records. This ensures that you're in the right context for accessing the archived data.
2. Locate and select the filter icon, often represented by a funnel or similar symbol.
3. From the dropdown menu, choose the "Archived" option. This action will reveal a set of additional choices, allowing you to decide whether to "Include archived" or "View only archived."

These steps grant you control over how you interact with your archived records, providing flexibility in terms of visibility. Whether you opt to include archived records in your regular view or exclusively focus on the archived ones, Asset Panda empowers you to navigate and manage your data with unparalleled ease.

Query – How to remove records from Archive status?

Archiving records in Asset Panda doesn't mean they're consigned to an eternal archive. The Activate feature provides a convenient means to reverse the archival process whenever needed. Here's how you can effortlessly bring records back from the archive:

1. Begin by viewing your archived records, referring to the "View Archived Records" section for a quick refresher on the steps involved.
2. Select the specific archived records you wish to activate, signalling their removal from archived status.
3. Click on the ellipses icon (depicted as three dots) to unveil a dropdown menu, and then select "Archive/Activate."
4. From the subsequent options, choose "Activate" to swiftly restore the selected records.

Just like that, your records are liberated from their archived status, thanks to the Activate feature. However, if you prefer a more targeted approach for reactivating individual items, Asset Panda has you covered with an alternative method:

1. Once again, navigate to your archived records and single out the specific record you wish to reactivate.
2. Click on the ellipses icon located at the end of the record, then select "View."
3. In the viewing mode, click on the ellipses icon again, and this time, choose "Unarchive."

The record is now gracefully removed from its archived status, providing you with a flexible and efficient approach to managing your data.

A parting note worth mentioning: if you choose to remove a record from archived status, then later decide to archive it again, the system allows you to specify a new date to stop depreciation, overwriting the existing stop date. This dynamic feature ensures that you maintain control and customization over the archival process, adapting it to your evolving needs.

Query - How to hide Inactive Records?

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1. Start by clicking on the settings icon, often represented by a gear or cogwheel, and then select "Group Settings."
2. Within Group Settings, navigate to your People group, which may be labeled as your Employees group or under a similar designation. Once in the People group, click on the "Status Field" link.
3. In the subsequent interface, locate the "Default for listing" column. Here, you'll find an option related to the status display on the main listing page. To hide inactive employees, simply deselect the checkbox corresponding to "Inactive."

The "Default for listing" concept signifies that a particular status is set to appear by default on the main listing page. By deselecting the box for "Inactive," you customize the default display to exclude inactive employees. It's important to note that even though the inactive status is no longer visible by default, you can still access it by performing a Status Filter search on the Employees main listing page when needed.

This straightforward process allows you to tailor the main listing according to your preferences, emphasizing active employees while efficiently managing the visibility of inactive ones. Asset Panda's user-friendly interface ensures that customization is both intuitive and flexible, enabling you to optimize the display of employee status in line with your organizational needs.

Query - How to perform Reallocation?

The reallocation feature in Asset Panda empowers users to efficiently modify multiple records at once, streamlining the process of updating information across selected assets. Here's a step-by-step guide on how to utilize the reallocation feature:

1. Begin by navigating to your Assets page within Asset Panda. Here, you can see a comprehensive list of your assets.
2. Select the checkbox next to the asset or assets that you intend to reallocate. This action signals your choice for the upcoming reallocation process.
3. Locate the three vertical dots (ellipses) in the upper right corner of the page. Click on these dots to reveal a dropdown menu, and then select "Reallocate."
4. In the reallocation interface, you'll have the option to select the fields you wish to modify. It's crucial to note that you can choose more than one field; however, modifying multiple fields will result in the change being applied to all selected assets. Click "Continue" once you've made your selections.
5. Enter the values for the selected fields. The specific fields you choose to modify may vary based on your organizational needs. Once you've entered the values, click "Continue" to proceed.
6. A notification will appear, alerting you that changes are about to be made to your selected assets. Confirm that the entered values and changes are accurate.
7. Finally, click "Update Records" to execute the reallocation. This step ensures that the selected assets are updated with the new information.

Congratulations! Your selected assets are now successfully updated, thanks to the reallocation feature. This efficient process allows for bulk modifications, saving time and ensuring consistency across multiple records. Asset Panda's user-friendly interface and reallocation functionality provide a powerful tool for managing and updating asset information with ease.

Query - How to Replicate Records?

Replication in Asset Panda offers a convenient and swift method for duplicating records, enabling users to efficiently create up to 25 copies with a single replication process. Here's a step-by-step guide on setting up and executing record replication:

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1. Start by selecting the settings icon and then choose "Group Settings."
2. Within Group Settings, locate your Assets group, and click on the "Edit" link associated with that group.
3. Identify the specific field you want to include in your replication and select "Edit" for that particular field.
4. Scroll down to find the "Include in Replication" option, and check the box to include the chosen field in the replication process.
5. Click "Save and Close" to confirm the inclusion of the selected field in the replication setup.
6. Navigate to the record you wish to replicate. If you need assistance, refer to the "View a Record" section for more information on how to access and view records.
7. Click on the ellipses icon situated at the top of your screen, then select "Replicate."
8. Choose either "Single" to replicate a single record, requiring you to provide a name and additional information, or select "Multiple" to specify the number of times you want to replicate the record.
9. Deselect any fields you don't wish to include in the replication. This step ensures that only the relevant information is duplicated.
10. Enter the replicate information in the appropriate fields, and click "Save."

Following these steps, you will receive an email confirmation verifying the successful replication of your records. Asset Panda's replication feature streamlines the process of creating multiple records by copying selected information, allowing users to focus on inputting unique values for each new record. This user-friendly functionality, coupled with the ability to customize field inclusion, makes record replication a powerful tool for managing data efficiently within the Asset Panda platform.

Query - How to Search for Multiple Records?

Efficiently searching for multiple items in your Assets group within Asset Panda is a breeze with the following step-by-step guide:

1. Start by clicking to open your Assets group, and then locate the search bar positioned in the top-left corner of your screen. You can access the search field by clicking on the magnifying glass icon.
2. To initiate a search for multiple items simultaneously, employ the pipe (|) character, typically located above the Enter key on your keyboard. Begin by typing each asset you wish to search for, separating each with the pipe character. Once you've listed all the assets, press Enter on your keyboard or click the magnifying glass icon in the search field to trigger the search.

It's essential to note a crucial limitation: you can only search for multiple assets using the same list field. For instance, you can search for multiple asset IDs simultaneously, but attempting to search for a combination of asset IDs and serial numbers concurrently is not supported. This restriction ensures clarity and precision in your search results, allowing Asset Panda users to swiftly and effectively retrieve the information they need within their Assets group. This search functionality enhances the user experience, making it easy to locate and manage multiple assets seamlessly.