

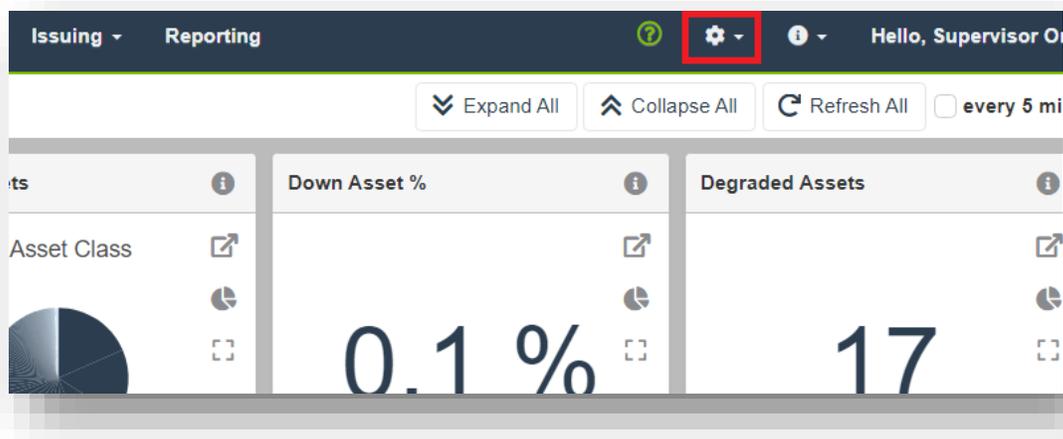
How to Create and Edit Asset Types

Asset Types are a foundational tool in LLumin CMMS+, helping you group assets by shared characteristics like Hydrants, Pumps, or Machines. Configuring Asset Types ensures your asset data is organized and easy to manage for filtering, reporting, and categorizing.

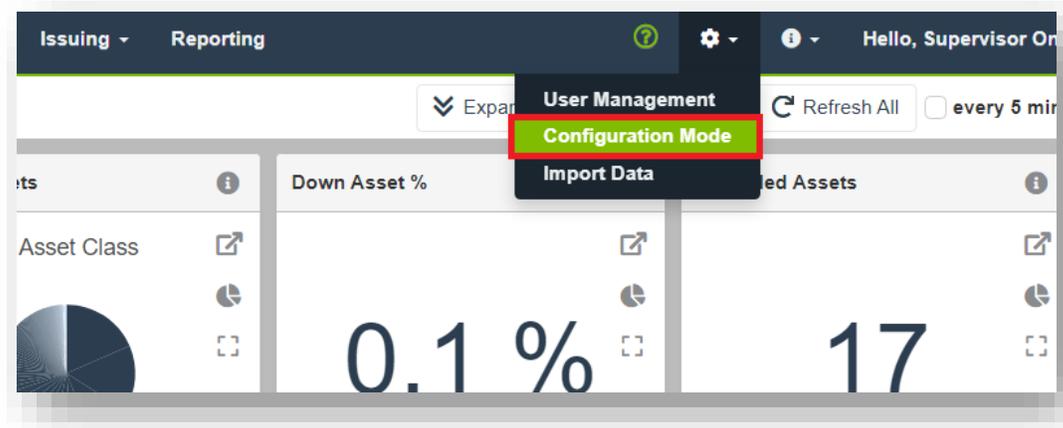
How to Create an Asset Type

To configure Asset Types, follow these steps:

1. Click the **Gear** icon in the menu bar.



2. Select **Configuration Mode** to access the system's setup tools.



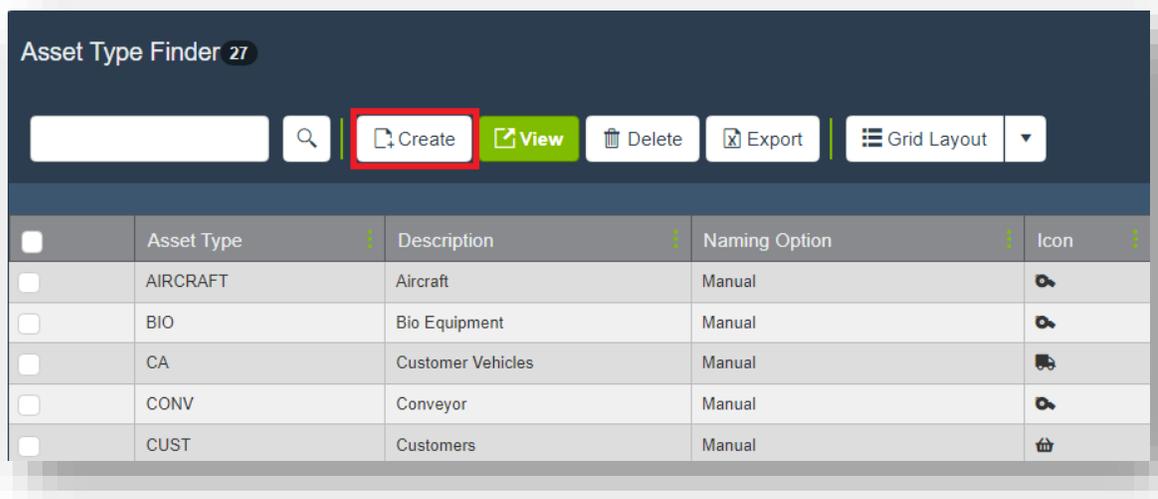
3. On the **Configuration Mode** screen, click the **Assets & Work Management** card to find configuration options for asset-related settings.



4. Select **Asset Types** to view the **Asset Type Finder** screen, where all configured Asset Types are displayed.



5. Create a new Asset Type by clicking **Create** in the toolbar of the Asset Type Finder.



6. When the **Create an Asset Type** screen opens, complete all necessary fields. Fields marked with a red asterisk (*) are required.

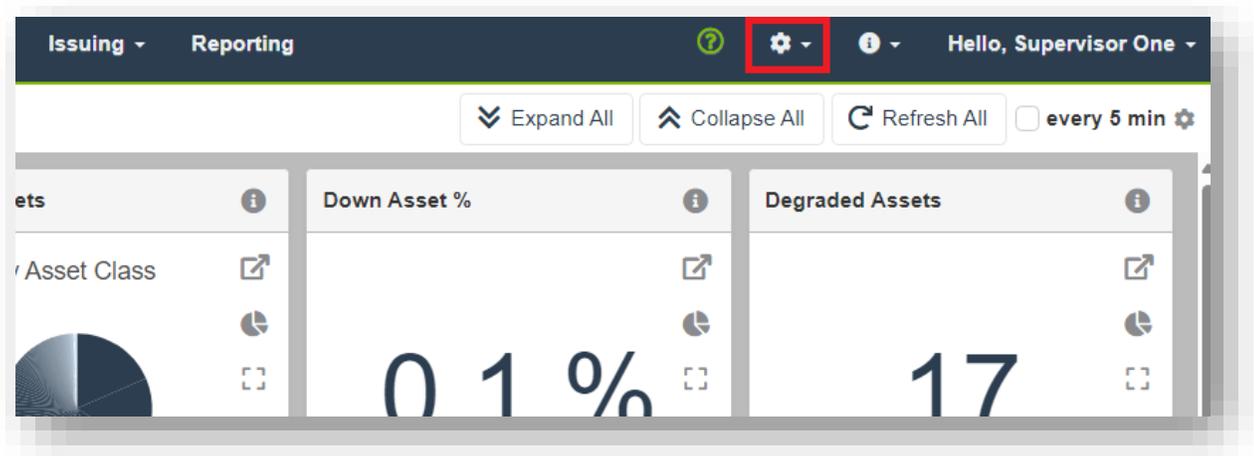
Field	Description
Asset Type	Enter a short, uppercase identifier (e.g., PUMP). Avoid spaces or special characters.
Description	Provide a clear and descriptive name for the Asset Type.
Icon	Select an icon that visually represents the type of asset. Icons are displayed throughout the system.
Asset Naming Scheme	Choose one of the following options: <ul style="list-style-type: none">• Manual: Users manually assign Asset IDs.• Auto-Generated: The system automatically creates Asset IDs using the Asset Type ID and a sequential number. Specify the number format and starting value.

7. Click **Save** to finalize your new asset type. After saving, a confirmation message will appear at the top of the screen.

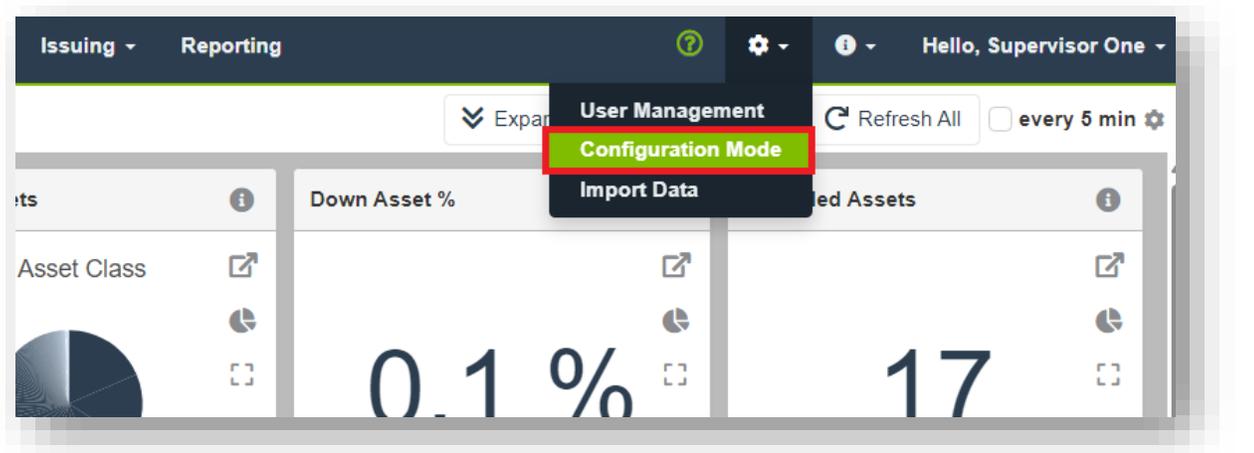
How to Edit an Asset Type

To edit an asset type, complete the following:

1. Click the **Gear** icon in the menu bar.



2. Select **Configuration Mode** to access the system's setup tools.



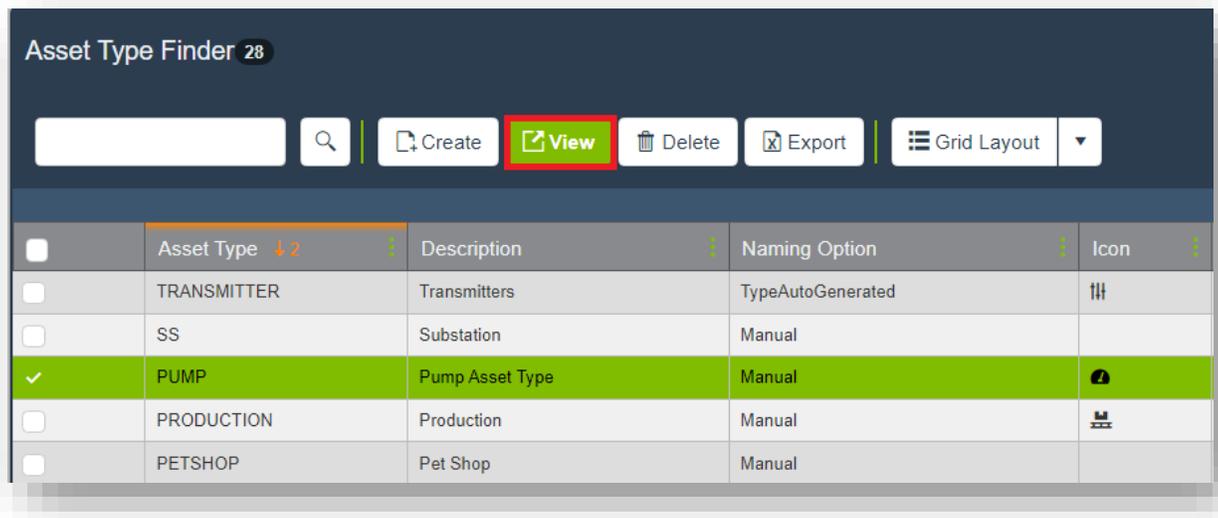
3. On the **Configuration Mode** screen, click the **Assets & Work Management** card to find configuration options for asset-related settings.



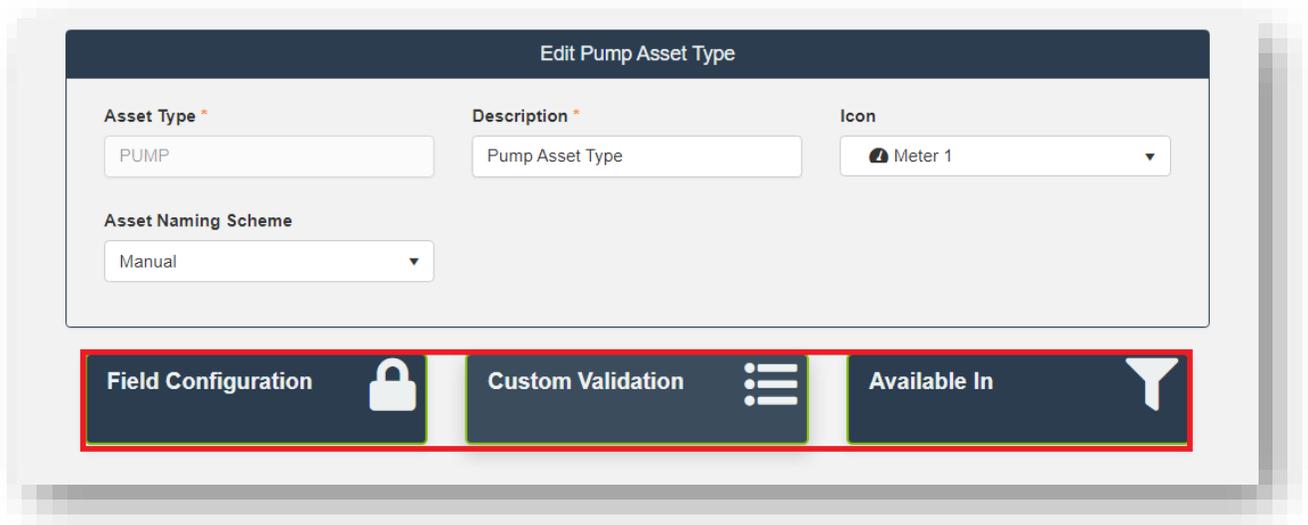
4. Select **Asset Types** to view the **Asset Type Finder** screen, where all configured Asset Types are displayed.



5. To edit an Asset Type, select the desired Asset Type from the finder grid and click **View** in the toolbar.

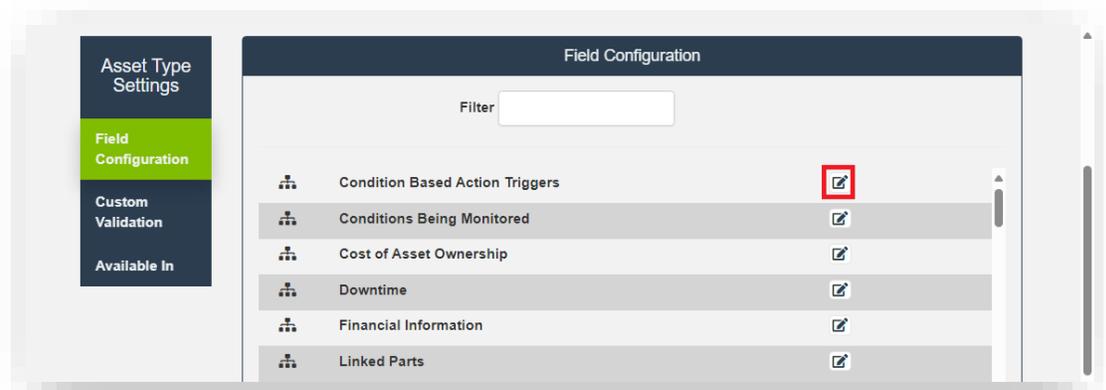


6. In the Edit Asset Type screen, users can update the following fields:
 - a. **Description**
 - b. **Icon**
 - c. **Asset Naming Scheme**
7. Users will also see the option to update:
 - a. **Field Configuration**
 - b. **Custom Validation**
 - c. **Available In**

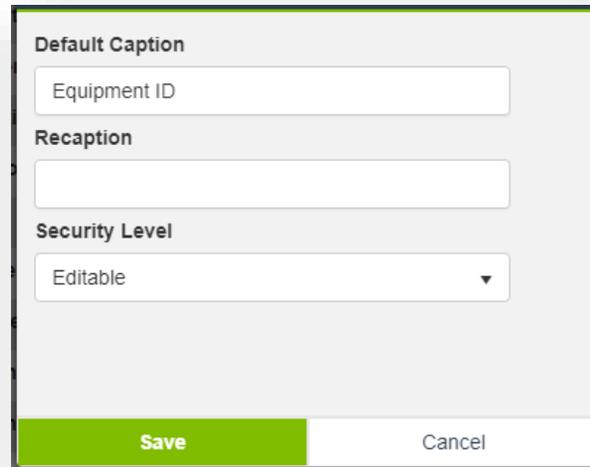


8. **Field Configuration:**

- a. Click the **Edit** button next to the field you want to customize.

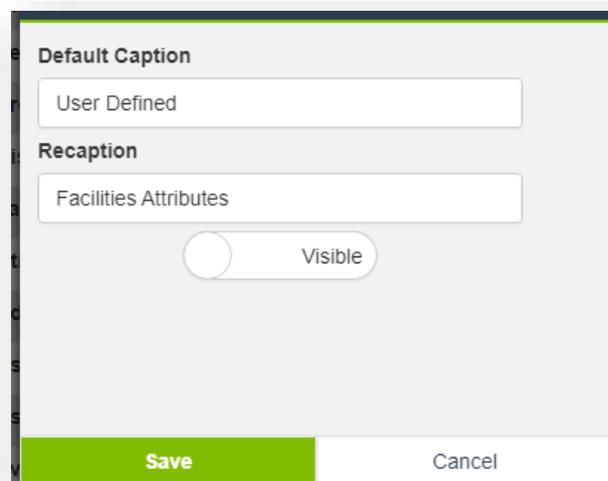


- b. Here, users can adjust which fields are visible, recaption fields, or modify security levels (e.g., hidden, editable, or required) on an asset type.



A configuration dialog box with a light gray background and a dark gray border. It contains three sections: 'Default Caption' with a text input field containing 'Equipment ID'; 'Recaption' with an empty text input field; and 'Security Level' with a dropdown menu showing 'Editable'. At the bottom, there are two buttons: a green 'Save' button and a white 'Cancel' button.

- c. To use the next section, **Custom Validation**, users must first edit the User Defined fields (UDFs) in this section.
- d. The **User Defined** option populates a section under the **General** tab of assets using this asset type. Rename it to reflect its purpose (e.g., Facilities Attributes for building-related data).



A configuration dialog box similar to the one above. The 'Default Caption' field contains 'User Defined'. The 'Recaption' field contains 'Facilities Attributes'. Below the 'Recaption' field is a toggle switch labeled 'Visible', which is currently turned off. At the bottom, there are two buttons: a green 'Save' button and a white 'Cancel' button.

- e. Recaption individual fields within the **User Defined** section, such as **Square Footage** or **Flooring Material**, to make them relevant to your organization.

A	Square Footage	User Defined Field 1	
A	User Defined Field 10		
A	Baseboards	User Defined Field 11	
A	Wall Color	User Defined Field 12	
A	User Defined Field 13		
A	User Defined Field 14		

9. Custom Validation:

- a. Navigate to the **Custom Validation** menu, where recaptioned UDFs from the **Field Configuration** menu are listed.

The screenshot shows a sidebar menu on the left with the following items: Asset Type Settings, Field Configuration, Custom Validation (highlighted in green), and Available In. The main content area is titled 'Custom Validation' and contains a 'Preview' section. Under 'Preview', there are three rows of dropdown menus, each with an edit icon to its right. The first row is labeled 'Square Footage', the second 'Flooring Material (4)', and the third 'Windows'.

- b. Locate the field you want to configure (e.g., **Flooring Material**) and click the pencil icon to create dropdown options.

Value	Description	
Carpet		X Delete
Laminate		X Delete
Tile		X Delete

- c. Enter the desired values (e.g., **Carpet, Laminate, Tile**) and optionally add descriptions for clarity. Click **Save** to finalize the list.
- d. Once saved, these dropdown options will appear under the recaptioned section (e.g., **Facilities Attributes**) in the **General** tab of associated assets.

General

Facilities Attributes

Square Footage: 1115

Ceiling: [Dropdown]

Flooring Material: [Dropdown menu open with options: Carpet, Laminat, Tile, Wood]

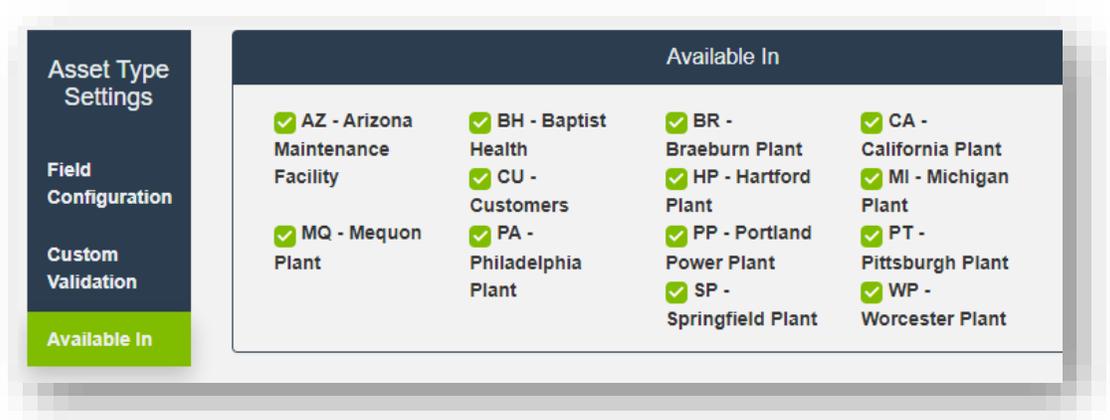
Windows: [Input field]

Wall Color: [Input field]

- e. If no options are added, the field will remain open for manual data entry.

10. Available In:

- a. Specify which locations the Asset Type is available in by selecting or deselecting locations in this menu.



11. Once you have made updates in any of these sections, click **Save** to apply the changes to the Asset Type.

