



Asset Management

Template Set Getting Started Guide

With the Asset Management Template Set, you can optimize and streamline your asset management process. Using the pre-built form, users can develop an inventory of assets, track their locations and conditions real-time with the included dashboard.

Asset Management

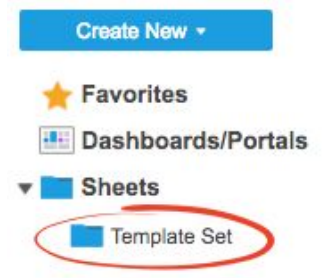
Template Set Getting Started Guide

REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. [Click here](#) to see a list of discontinued plans.

Download

The data will be download in the *Sheets* folder. Look on the left-hand side, under *Sheets*, to access and launch the template set items.

[Asset Management Template Set](#)



How It Works

With the Asset Management template set, you can optimize and streamline your asset management process. Using the pre-built form, you can develop an inventory of assets, track their locations and conditions real-time with the included dashboard. This template set includes:

Asset Warranty Expiration Report

Is a live filter that displays the warranty expiration for all assets.

Overdue Assets Report

Is a live filter that displays all assets that are checked out beyond their due date.

Assets Needing Repair Report

Is a live filter that displays all assets that have been evaluated to be in poor condition and need repair.



Asset Tracker Sheet

A single sheet to inventory, assign, and track assets.

Asset Metrics Sheet

Summarizes your asset metrics that will be used in the dashboard.

New Asset Intake Form

A simple intake form that records new assets directly in the Asset Tracker sheet.

Asset Management Dashboard

The one-stop-shop for stakeholders to view everything that's happening with managed assets. It includes high-level charts representing status, asset types, and reports.

Asset Management

Template Set Getting Started Guide

Set Up



Using a [workspace](#) is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

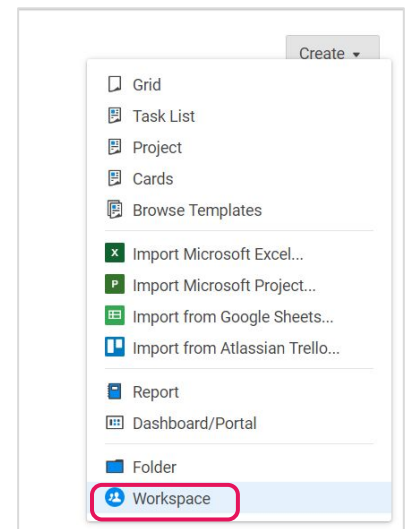
Step 1:

Create a New Workspace

Open *Home*. From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.

Learn more:

[Workspaces Overview](#), [Workspace Sharing](#), [Home Tab](#)



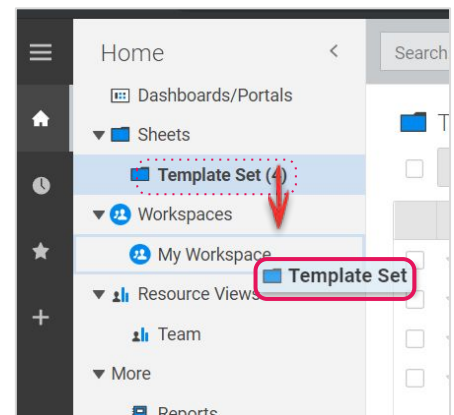
Step 2:

Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.

Learn more:

[Manage Items in a Workspace \(Add, Move, Remove\)](#)



Asset Management

Template Set Getting Started Guide

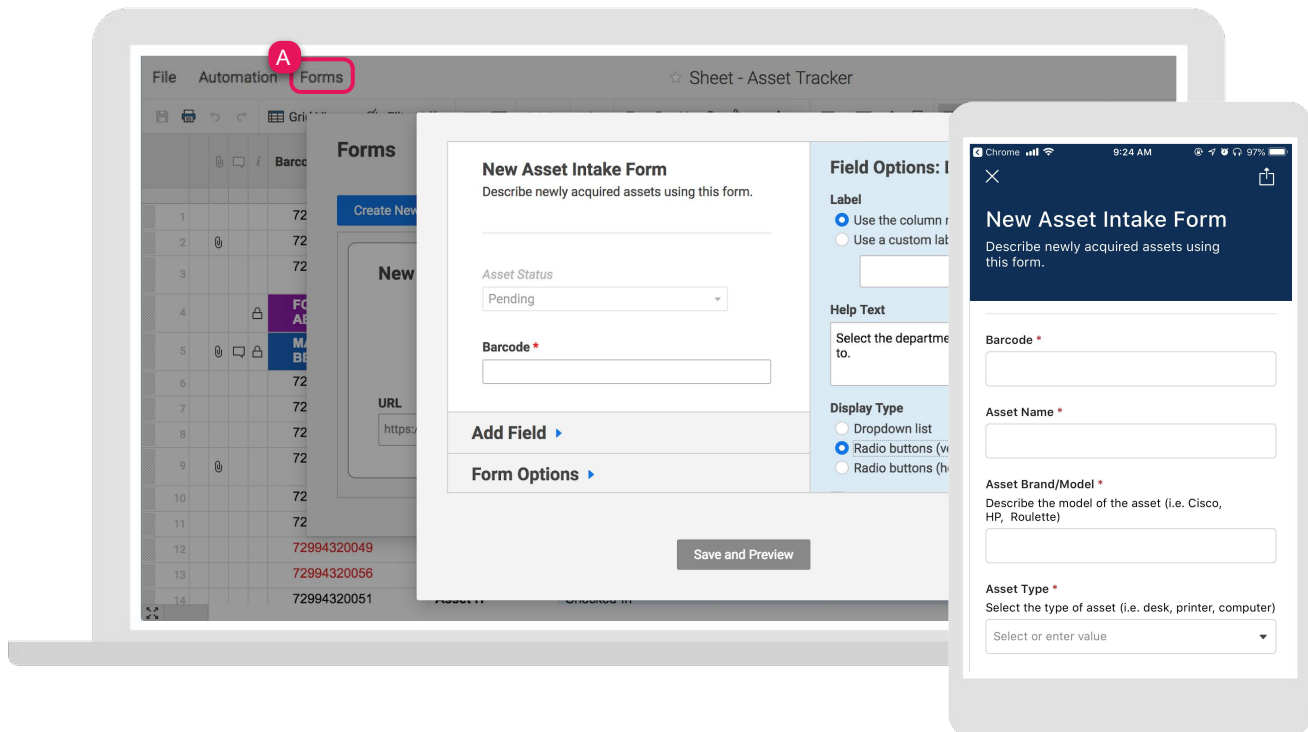
Customize

Step 3:

Add Assets with the New Asset Intake Form

The New Asset Intake form enables equipment and asset managers to quickly register new assets into your inventory. New assets are added directly to the Asset Management sheet where the check in/out process is managed, and key information is tracked, including location, condition, and other details. The intake form can be completed easily from a PC or mobile device.

- Customize the form by first opening the Asset Tracker sheet and click on Forms in the top menu.
- Click on Manage Forms and then Edit to customize the existing fields. You can add or remove fields, change field titles or descriptions, and modify Form Options.
- Hit Save to close the form builder and copy and save the URL displayed. This URL is what you'll provide to everyone who will be submitting requests.



Learn more:

[Forms](#), [Edit Existing Form Fields](#)

Asset Management

Template Set Getting Started Guide

Step 4:

Register New Assets in the Asset Tracker Sheet

As new assets are logged through the New Asset Intake form, they will appear at the top of the Asset Tracker sheet. The Asset Status column has a default value that can be changed, and will automatically display the asset as Pending.

Once the asset has been registered, the status can be changed to Checked-In and moved below the Managed Assets line. Changing the status to Checked-In denotes what assets are available for check-out. We have also set up conditional formatting rules in grid view, so you can visually identify the assets that are checked-out beyond the due date (red font across the entire row) or when the Asset Status is set to Maintenance (the cell will become highlighted in yellow).

Additionally, there is conditional formatting for Asset Status to help enhance the categories in card view - Checked-Out (blue taskbar), Checked-In (green taskbar), Maintenance (yellow taskbar), or Pending (purple taskbar). You assign assets to the Asset Manager and the Assignee (the individual checking out the asset) in the indicated columns, which are Contact List column types. It's a best practice to use Contact List columns when assigning owners because they can be used to set automated actions, notifications, reports, and more.

- Customize, disable, or add conditional formatting rules by clicking on the conditional formatting button in the top toolbar.
- To modify the options in the Asset Status dropdown list, double-click on the Asset Status column header and edit the options under *Values*. Repeat these steps to modify the options in the Department, Asset Type, and Vendor columns.

	Barcode	Asset Name	Asset Status	Assignee	Assignee Phone Number	Assignee Location	Assignee Check-Out Date	Assignee Check-In Date	As
1	72994320055	Asset F	Pending			47.614883 -122.195750			
2	72994320054	Asset J	Pending			47.614883 -122.195750			
3	72994320052	Asset C	Pending			47.614883 -122.195750			
4	FORM ENTRIES ABOVE								
5	MANAGED ASSETS BELOW								
6	72994320044	Asset B	Checked-Out	Adam Hart	(888) 555-4331	47.617931 -122.200356	02/28/19		
7	72994320045	Asset A	Checked-Out	Adam Hart	(888) 555-4331	47.617931 -122.200356	03/03/19		
8	72994320046	Asset F	Checked-Out	Adam Hart	(888) 555-4331	47.617931 -122.200356	02/27/19		
9	72994320053	Asset C	Checked-In			47.617931 -122.200356		02/08/19	

Learn more:

[Use the Best Column Type for Your Data](#), [Apply Formatting Automatically with Conditional Formatting Rules](#), [Managing Contacts](#), [Auto-Number Column](#), [Use a System Column to Automatically Add Information to a Row](#), [Enhance Information in Card View](#)


Asset Management

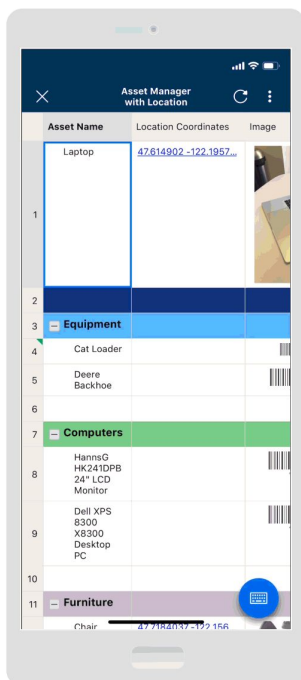
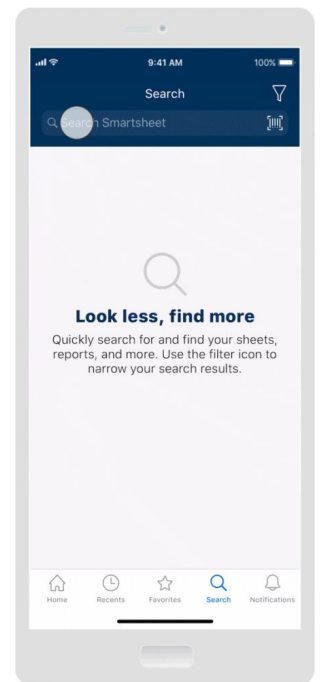
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Step 5:

Change Asset Status as Assets Check In and Out

Manage the asset Check-In/Check-Out process by using the built in barcode scanning feature to quickly locate an asset in the Asset Tracker sheet. When an asset is checked in or out, the person tracking assets will update the following columns (highlighted in light blue in the Asset Tracker sheet): Asset Status, Assignee, Assignee Phone Number, Assignee Location, Assignee Check-Out Date, Assignee Check-In Date, Assignee Notes, Assignee Due Date, Asset Condition, and Date Condition Last Evaluated. The person tracking assets can modify entries directly in the Asset Tracker sheet using a PC or mobile device.

- Start the check out process using a mobile device by first opening the Smartsheet mobile app.
- Click on the Search (magnifying glass) icon and then click on the barcode icon . The mobile device's camera will open with Auto Capture automatically toggled on. Line up the asset's barcode to read it.
- Once the barcode information is read, the app will display the row with the associated barcode number. Tap on the barcode string. The associated row will pull up and display in the Asset Tracker sheet. The person tracking assets can then update the appropriate columns highlighted in blue.



- When assets are being checked out, use mobile location to record where the assignee is located in the Assignee Location column.
- Click a cell in the Assignee Location column. Then click the keyboard button and click on the location icon . The selection map will open and automatically snap to your current GPS location. Move the pin by dragging it to the desired location. Click Select to log the location, as GPS coordinates, for the asset.

Learn more:

[Dropdown List](#), [Smartsheet for Android](#), [Smartsheet for iOS](#), [Mobile Barcode Scanning](#), [Add a Link to Your Location in a Cell or Form](#)

Asset Management

Template Set Getting Started Guide

Step 5 (continued):

Change Asset Status as Assets Check In and Out

The Asset Status column will help keep track of your assets as they are checked-out, checked-in, or out for maintenance. The Asset Condition column is a *Symbols* column that the person tracking assets can use to select a symbol and color to indicate whether the asset is in Good, Okay, or Bad condition. All other columns are locked to prevent editors from manipulating the information in other cells.

- F. Assign assets to individuals checking out the asset by adding their email addresses in the Assignee column.
- G. Record the date for assets in the Assignee Check-Out Date and Assignee Check-In Date columns to track the status of each asset.
- H. As items are checked out delete the date in the Check-In Date column. As items are returned delete the dates in the Check-Out Date column. Repeat these steps as assets are being checked in and out.

	Asset Status	Assignee	Assignee Phone Number	Assignee Location	Assignee Check-Out Date	Assignee Check-In Date	Assignee Notes	Assignee Due Date	Asset Condition	Date Condition Last Evaluated	Dep
1	Pending			47.614883 -122.195750					●	03/05/19	
2	Pending			47.614883 -122.195750					●	03/04/19	
3	Pending			47.614883 -122.195750					●	03/05/19	
4											
5	Check In/Check Out Tracking Information →										
6	Checked-Out	Adam Hart	(888) 555-4331	47.617931 -122.200356	02/28/19			03/14/19	●	02/14/19	
7	Checked-Out	Adam Hart	(888) 555-4331	47.617931 -122.200356	03/03/19			03/17/19	●	02/11/19	
8	Checked-Out	Adam Hart	(888) 555-4331	47.617931 -122.200356	02/27/19			03/13/19	●		
9	Checked-In			47.617931 -122.200356		02/08/19			●	03/03/19	
10	Maintenance	Bill Hudson	(888) 555-4339	47.617931 -122.200356	02/22/19			03/08/19	●		
11	Maintenance	Bob Thorton	(888) 555-4333	47.617931 -122.200356	02/22/19			03/08/19	●		
12	Checked-Out	Bob Thorton	(888) 555-4333	47.614883 -122.195750	01/15/19			01/29/19	●		
13	Checked-Out	Alane J.	(888) 555-4332	47.617931 -122.200356	01/01/19		Out for repair.	01/15/19	●	02/12/19	
14	Checked-In			47.617931 -122.200356					●		

Learn more:

[Dropdown List](#), [Smartsheet for Android](#), [Smartsheet for iOS](#), [Mobile Barcode Scanning](#)

Asset Management

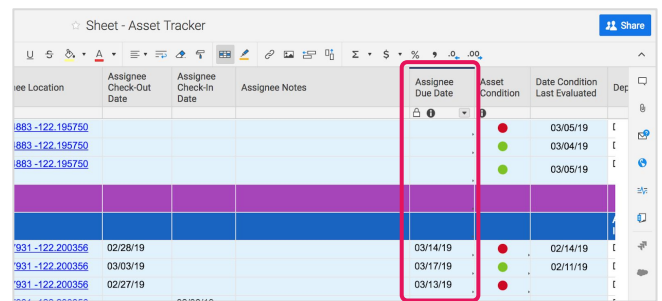
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Step 6:

Adjust Asset Due Date As Needed

The Assignee Due Date column has a formula that calculates the date the asset should be checked-in by adding two weeks (14 days) to the date added in Assignee Check-Out Date. This column is therefore locked to prevent editors from manipulating the formulas. Record the date when the asset is returned in the Check-In Date column.

- A. To modify the Assignee Due Date, double-click on the cell and modify the number of days to add to the Check-Out Date column.
- B. Copy the formula for the entire column.
- C. New form entries will autofill the formula in the new rows.



Learn more:

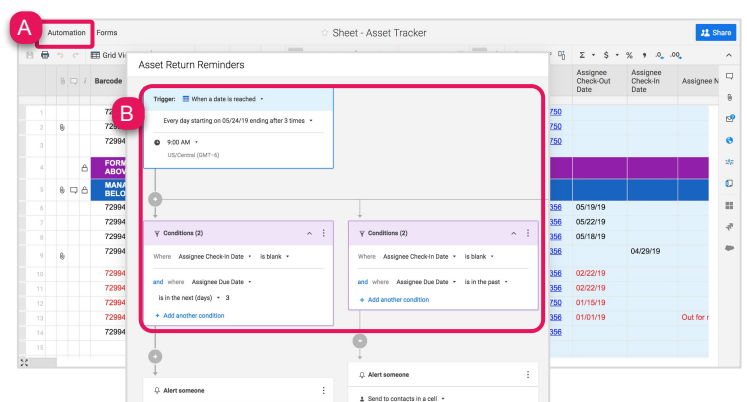
[Use or Override Automatic Formatting and Formula Autofill](#), [Use Formulas to Perform Calculations With Dates](#)

Step 7:

Approaching Due Date and Overdue Reminders

An automated recurring reminder is a great way to keep track of which assets have upcoming or past due dates. When an asset is due in the next 3 days or is past due, the Assignee will receive a reminder every day until the Assignee Check-In Date column contains a date. We've built this recurring reminder to stop after 3 times. Note if you set up recurring reminders for other people, be thoughtful about how often you send the alert.

- A. Modify the alert by going to *Automation* and select *Manage Workflows* in the dropdown menu. Then double click on the Asset Return Reminders workflow you would like to modify in order to open the editor window.
- B. Customize the workflow's schedule and conditions however you like and then click *Save*.



Learn more:

[Save Time and Work Faster With Automated Workflows](#), [Control Who Can Receive Notifications from Your Sheet](#), [Alerts & Reminders](#)

Asset Management

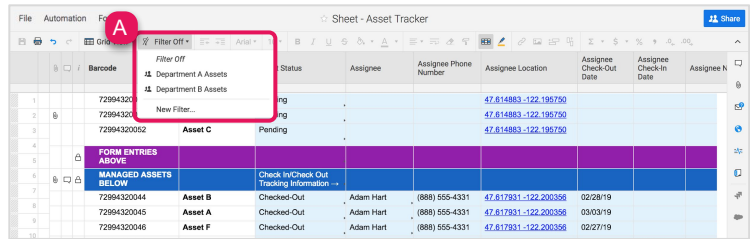
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Step 9:

Cut Through Noise Using Sheet Filters

If you have a lot of assets, filters are a great way to help people cut through the noise. On the Asset Tracker sheet, we created shared filters called “Department A Assets” and “Department B Assets”. Anyone viewing the sheet can select the filter to see only those assets assigned to their department.

- A. Select the Filter Off button in the toolbar to create, use or modify filters.



Learn more:

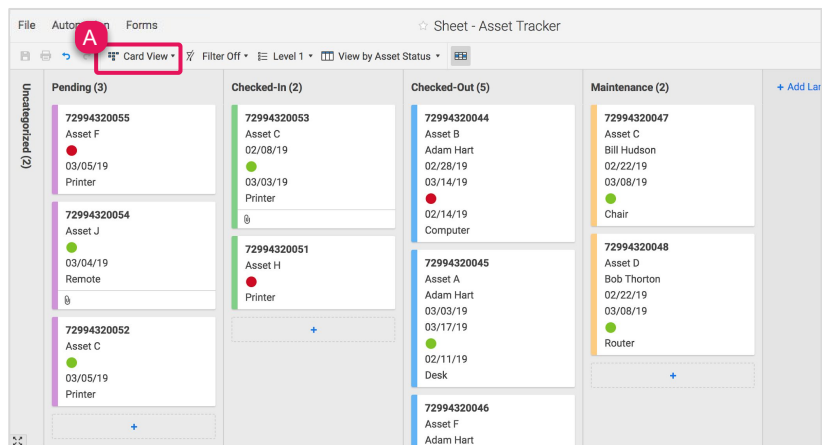
[Filters](#), [Shared Filter](#)

Step 10:

Switch to Card View to Visualize Your Requests Differently

Card view is a great way to visually manage the status of each asset. You can view each asset as a card and move the card between lanes to update the dropdown value. Cards are categorized into lanes, driven by *Dropdown List*, *Contact List*, and *Symbol* columns in your sheet. Changes made by moving cards across lanes, adding a new card or lane, or editing cards will automatically reflect in grid, Gantt, and calendar views.

- A. Select Card View in the toolbar to switch from grid view to card view. The default view will be lanes by Asset Status.
- B. Update the status of the asset by dragging the card between lanes or double-click on the card to edit the data.
- C. Click on the gear icon in the upper right hand corner to adjust your card view settings and define which fields you want to display in your cards.



Learn more:

[Use Card View to Visualize Your Project](#)

Asset Management

Template Set Getting Started Guide

Step 11:

Sheet Bonus: View or Edit Your Project Summary Data

For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. Sheet summary is pre-populated to provide a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of asset status and condition. You also get a count for the number of assets overdue, due in the next 7 days, and upcoming expiring warranties. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas or reference another summary field.

- Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.
- To add fields, click +New Field.
- Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.
- To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⋮) to open the field options dropdown menu.

	Assignee Location	Assignee Check-Out Date
	47.614883 -122.195750	
	47.614883 -122.195750	
	47.614883 -122.195750	
1	47.617931 -122.200356	06/05/19
1	47.617931 -122.200356	06/08/19
1	47.617931 -122.200356	06/04/19
	47.617931 -122.200356	
9	47.617931 -122.200356	02/22/19
3	47.617931 -122.200356	02/22/19
3	47.614883 -122.195750	01/15/19
2	47.617931 -122.200356	01/01/19
	47.617931 -122.200356	

[Please provide feedback](#)

WHAT IS SHEET SUMMARY?

Sheet Admins can define, organize, and report on critical information in this sheet with Sheet Summary such as team contacts, metrics, and deadlines.

Asset Condition: Good *f(x)*

Asset Condition: Okay *f(x)*

Asset Condition: Bad *f(x)*

Asset Status: Pending *f(x)*

Asset Status: Checked-In *f(x)*

[+ New Field](#)

Learn more:

[Define Your Work with Sheet Summary](#), [Maximize Your Sheet Summary Usage](#), [Create a Portfolio View with a Summary Report](#)

Asset Management

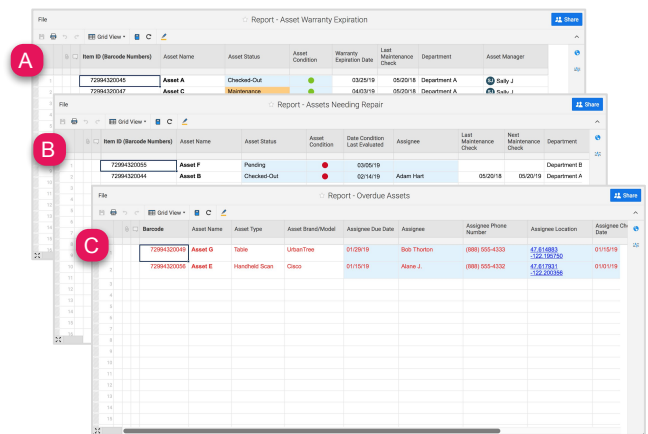
Template Set Getting Started Guide

Step 12:

Associated Live Reports

Use reports to create cross-sheet filtered lists of the tasks that meet certain criteria. Three reports are already set up based on the Asset Tracker sheet. If you want to make any changes to the criteria used for the report, open the report and click on Report Builder and set your criteria. Reports are live, so as the data is updated, it will be reflected automatically on associated reports. This set includes the following reports, which are also surfaced in the Asset Management Dashboard.

- A. Asset Warranty Expiration Report - This report shows all assets that have a warranty expiration date within the next 30 days.
- B. Assets Needing Repair Report - This report shows all assets that have an Asset Condition set as Bad (or the red ball symbol).
- C. Overdue Assets Report - This report shows all assets that have an Assignee Due Date that has passed.



Learn more:

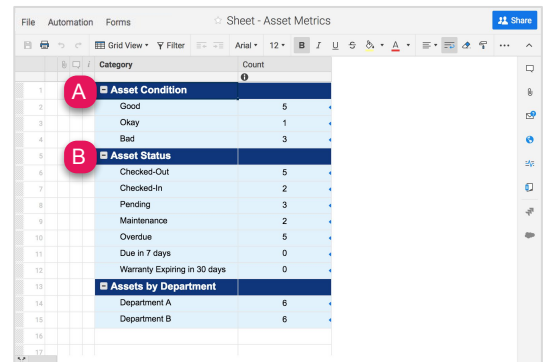
[Creating Reports, Share Sheets, Reports, and Dashboards](#)

Step 13:

Asset Metrics Sheet

The Asset Metrics sheet is a central location to roll up all of the metrics you want to track across all requests. We've designed this sheet with cross-sheet formulas so the metrics always reflect, in real time, the information in the underlying sheet.

- A. Overwrite the categories under each section to match your drop down lists in the Asset Tracker sheet. Replace the names of the assignees under the Assigned Category section.
- B. If you added new asset categories in the Asset Status or Department columns in the Asset Tracker sheet, insert a new row to the Asset Status or Department hierarchy sections and copy the formula. The formulas will automatically recognize the request type you enter in this section.



Learn more:

[Reference Data from Other Sheets](#)

Asset Management

Template Set Getting Started Guide

Step 14:

Asset Management Status Dashboard

Dashboards are made of different widgets that pull real-time information in from your other sheets and reports. The Asset Management dashboard is the keystone of your template set. It pulls together all of the critical information you need to track your assets.

- A. Click Edit in the upper left corner to begin customizing. Then hover over any widget and select the pencil icon to edit that specific widget.
- B. Replace the logo placeholder with your logo in the Image widget.
- C. Assets Overdue, Assets Due Soon, and Warranty Expiring Soon are all Metric widgets, pulling live data from your Asset Metrics sheet.
- D. Asset by Department and Asset Condition are Chart widgets that are also pulling live data from your Asset Metrics sheet, while Asset Status is pulling from your Asset Tracker sheet.
- E. The New Asset Intake Form and the card view of your Asset Management sheet are embedded in the dashboard using the Web Content widget.

Dashboard - Asset Management

Overview

- Assets Overdue:** 5
- Assets Due Soon:** 0
- Warranty Expiring Soon:** 0
- Asset Status:**
 - Checked-Out: 5
 - Checked-In: 2
 - Pending: 3
 - Maintenance: 2
- Assets by Department:**
 - Department A: 6
 - Department B: 6
- Asset Condition:**
 - Good: 5
 - Okay: 1
 - Bad: 3

Asset Tracking

Sheet - Asset Tracker (View Only)

Uncategorized (2)	Pending (3)	Checked-In (2)	Checked-Out (5)	Maintenance (2)
72994320055 Asset F 03/05/19	72994320053 Asset C 02/08/19	72994320044 Asset B Adam Hart 02/28/19	7299432004 Asset C Bill Hudson 02/22/19	

Learn more:

[Make Changes to an Existing Dashboard](#), [Viewing and Sharing a Dashboard](#), [Widget Types for Smartsheet Dashboards](#)

Asset Management

Template Set Getting Started Guide

Step 14 (continued):

Asset Management Status Dashboard

Dashboards are made of different widgets that pull real-time information in from your other sheets and reports. The Asset Management dashboard is the keystone of your template set. It pulls together all of the critical information you need to track your assets.

- F. The Overdue Assets, Assets Needing Repair, and Assets with Expiring Warranty are all Report widgets, which display your live reports in your dashboard.
- G. Replace the Key Resources, a Shortcut widget, with quick links to your sheets, forms, reports, and other resources outside of Smartsheet.

Overview

5 Assets Overdue

0 Assets Due Soon

0 Warranty Expiring Soon

Asset Status

Status	Count
Checked-Out	5
Checked-In	2
Pending	3
Maintenance	2

Assets by Department

Department	Count
Department A	6
Department B	6

Asset Condition

Condition	Count
Good	5
Okay	1
Bad	3

Asset Tracking

New Asset Intake Form (F)

Asset Tracking Grid:

Status	Asset ID	Asset Name	Asset Type	Brand/Model	Due Date	Assignee	Phone Number	Location	Check-Out Date	Notes
Pending	72994320055	Asset F	Printer	UrbanTree	03/05/19	Bob Thorton	(888) 555-4333	47.614883 -122.195750	01/15/19	
Pending	72994320054	Asset J	Remote	Cisco	03/04/19					
Pending	72994320052	Asset C	Printer	UrbanTree	03/05/19					
Checked-In	72994320053	Asset C	Printer	UrbanTree	02/08/19					
Checked-In	72994320051	Asset H	Printer	UrbanTree	03/03/19					
Checked-Out	72994320044	Asset C	Computer	UrbanTree	02/28/19	Adam Hart	(888) 555-4332	47.617931 -122.200356	03/14/19	
Checked-Out	72994320045	Asset A	Desk	UrbanTree	03/03/19	Adam Hart			02/11/19	
Checked-Out	72994320046	Asset F	Printer	UrbanTree	03/03/19	Adam Hart			02/27/19	
Maintenance	7299432004	Asset B	Chair	UrbanTree	02/22/19	Bill Hudson			03/08/19	
Maintenance	7299432004	Asset D	Router	UrbanTree	02/22/19	Bob Thorton			03/08/19	Out for repair.

Overdue Assets (G)

Barcode	Asset Name	Asset Type	Asset Brand/Model	Assignee Due Date	Assignee	Assignee Phone Number	Assignee Location	Assignee Check-Out Date	Assignee Notes
72994320049	Asset G	Table	UrbanTree	01/29/19	Bob Thorton	(888) 555-4333	47.614883 -122.195750	01/15/19	
72994320056	Asset E	Handheld Scan	Cisco	01/15/19	Alane J.	(888) 555-4332	47.617931 -122.200356	01/01/19	Out for repair.

Assets Needing Repair

Learn more:

[Make Changes to an Existing Dashboard](#), [Viewing and Sharing a Dashboard](#), [Widget Types for Smartsheet Dashboards](#)

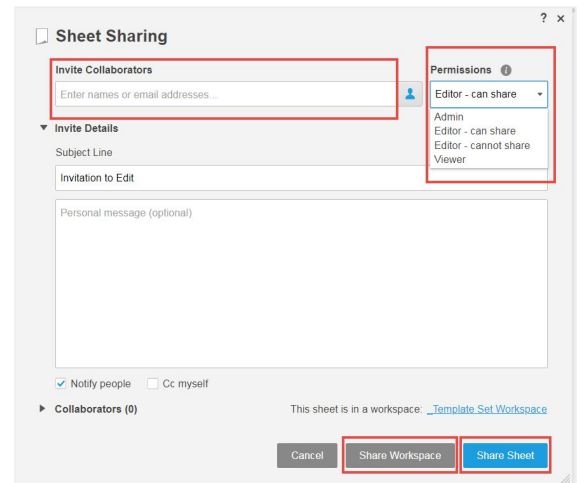
Asset Management

Template Set Getting Started Guide

Step 15:

Share Your Asset Management Template Set

Sharing is the best way to collaborate with others involved in your asset management process. You can share your entire workspace with key stakeholders, or you simply share individual items within the workspace. For more information on sharing and permission levels, check out this [infographic](#).



Learn more:

[Workspace Sharing](#)