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Assets: purchasing and documenting

Note this document does not replace nor negate Horizons Purchasing Policies.

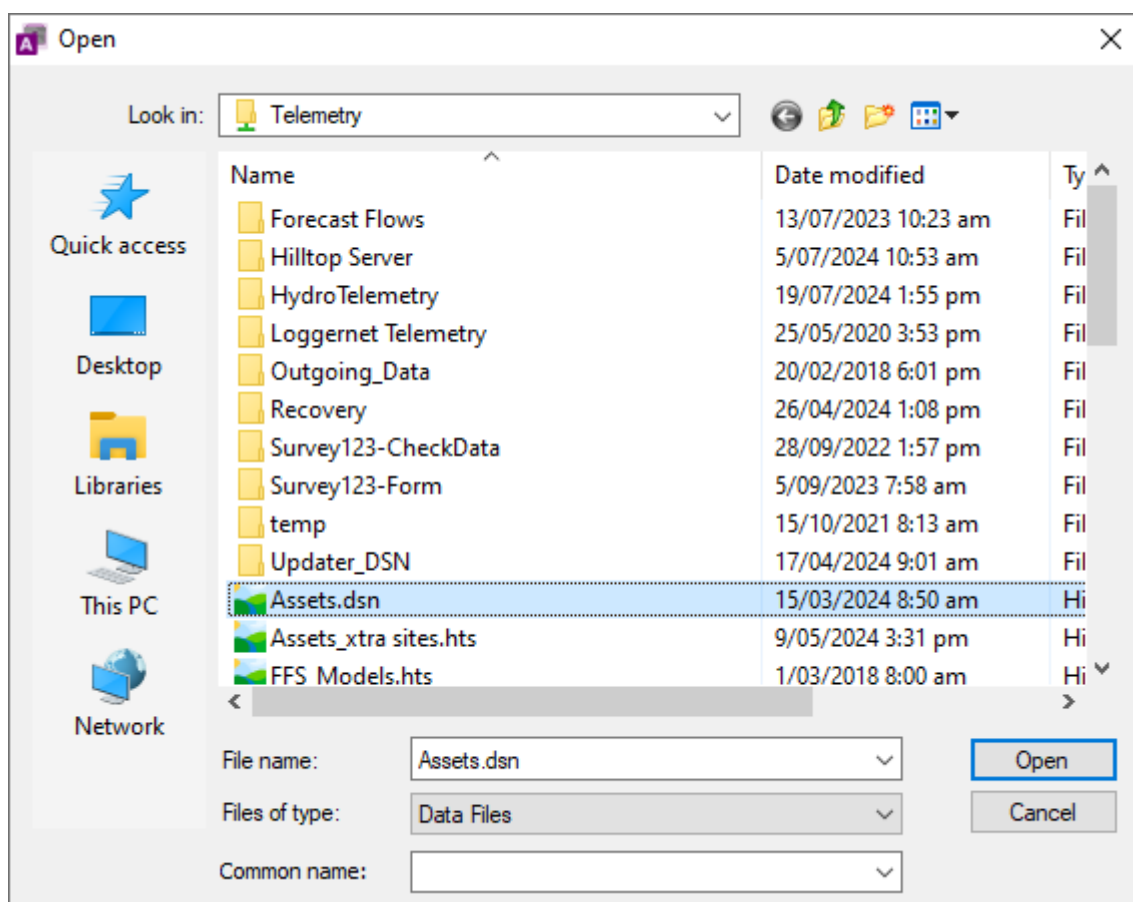
This SOP is how to record an asset once it has been purchased in accordance with Horizons purchasing policies.



Hilltop Assets:

This is a program under the Hilltop family that integrates into our time series management software. It is used primarily by the Environmental data team to store information about our assets primarily to support our data sets with information about our sensors such as purchase, life time, calibrations and where the assets are physically located.

Hilltop Asset can be found here: <\\ares\hilltop\hilltophrc\Asset\Assets.exe>

If this is your first time opening assets, you will need to point it to a database containing our site names. Click File, select open, and choose Assets.dsn:



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Which assets should we record in Hilltop Assets:

- Assets purchased which require some tracking (example calibration or limited life)
- Documents which expire (e.g inductions, training certificates excluding ones in Vault)
- All sensors which collect data
- Data loggers and telemetry equipment e.g. modems
- All batteries over 18 amp/hr
- Large aerials and satellite dishes
- Site infrastructure e.g. towers, containers.
- Power / battery tools
- Sim cards
- Reference sensors
- Gauging equipment
- Generators, air compressors
- Solar panels over 20 watts, solar regulators
- H&S and First Aid equipment carried in our vehicles
- Site access agreements (when they are relevant to a site)

What assets do not need tracking in Hilltop Assets (Guide only, common sense prevails)

- General fittings eg steel work, nuts and bolts etc.
- Small aerials
- Consumables (e.g DO sensor caps are not added to Assets, but changing of the cap needs to be recorded against the sensor)
- Office equipment (eg laptops, screens, stationary)

After purchasing assets, the person who made the purchase is responsible for updating assets. (This can be delegated within your team).

What we should record for a new asset:



- Category
- Make
- Model
- Serial Number (if no manufacturer code then create one)
- Date Purchased
- Warranty end date
- Purchase price
- Purchase Order number
- Project (optional eg flow meters)
- Label code (HRC QR code label **HRC_XXXXXX**)
- Depreciation (normally straight line)
- Deprecation rate (example: normally 10 years for big items, 5 years for electronics)
- Expected life time
- Calibration interval (e.g. 12 months)
- Warning interval (how many months before the calibration interval do I want to be told (typically 2 months)

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- Portfolio (Eg a water level sensor would be water level. A site might be Central)

Edit Asset			
Name			
Category	ED -> Instruments -> WQ -> Sondes -> EXO Sonde ▼		Add New
Make	YSI EXO 3 Sonde ▼		
Model	YSI with Depth (100m) ▼		
Serial number	Sonde 7 (17E101335) ▼		
Location			
Site or OOS Loc	Manawatu at Teachers College		
Data source			
Installation date	29-Mar-2023	Change Location ...	
Details			
Date purchased	30-May-2017	Warranty end date	30-May-2018
Purchased from	ENVCO		
Purchase price	\$24925.50	Order No.	86039
		Project	
Label Code	HRC_002433		
Depreciation method	Straight Line ▼	Depreciation Rate	10 %
Expected lifetime	10 years	Date Written Off	
Info URL			
External asset ID			
Portfolio	Water Quality Continuous ▼		
Comment	NEW, Purchased by Science ▼		
<input type="checkbox"/> Financial Asset	<input type="checkbox"/> Insured	Criticality	
Health and safety risk	▼		
Calibration			
Last calibrated	22-Apr-2024		
Calibration interval	3.0 months		
Warning interval	1 months		
New Calibration ...			
Sonde settings			
<input checked="" type="radio"/> Not a multi-parameter instrument			
<input type="radio"/> Head Unit			
<input type="radio"/> Sensor in a head unit			
▼			

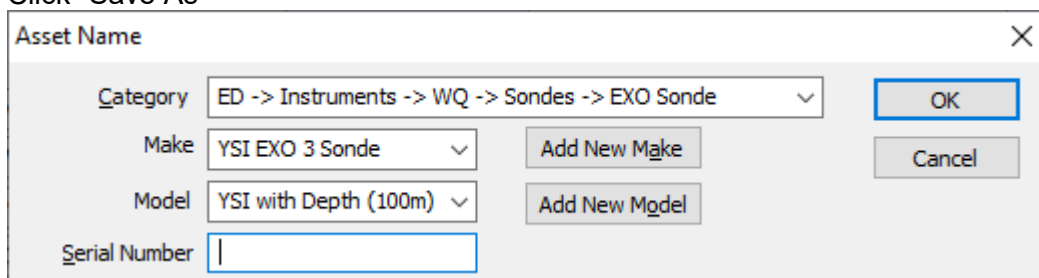
Once above is entered, click save.

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Bulk Entry: (if you have a several of the same items e.g you purchased 5 radars)

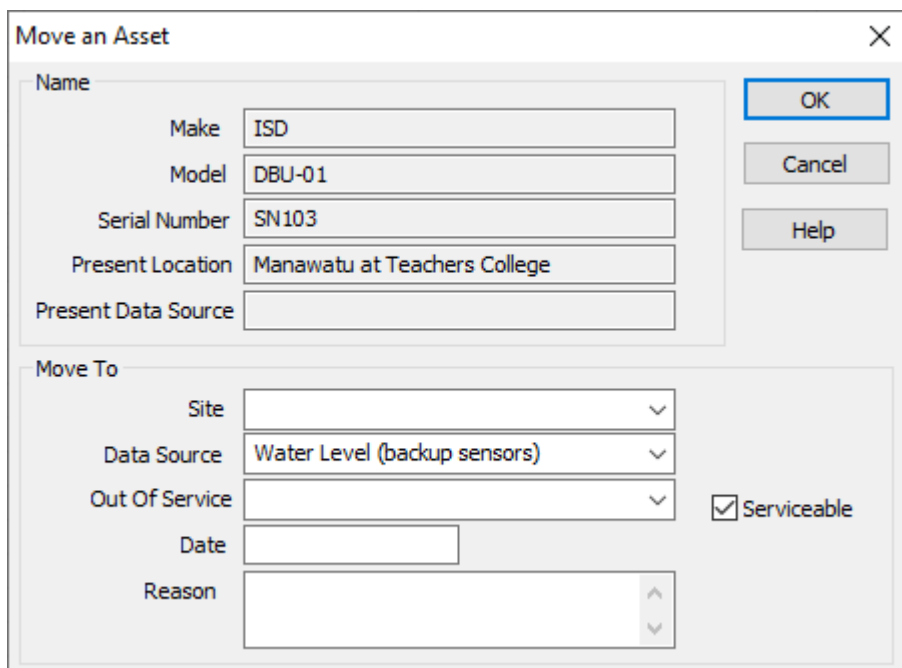
1. Complete the above step once / fill out the form for the first asset.
2. Right click on the asset and select edit
3. Click "Save As"





4. Enter the serial number of the next item and click ok
5. Enter the HRC label code
6. Click safe.

Each asset (first time or when relocating it)

Right click on the asset and select move:



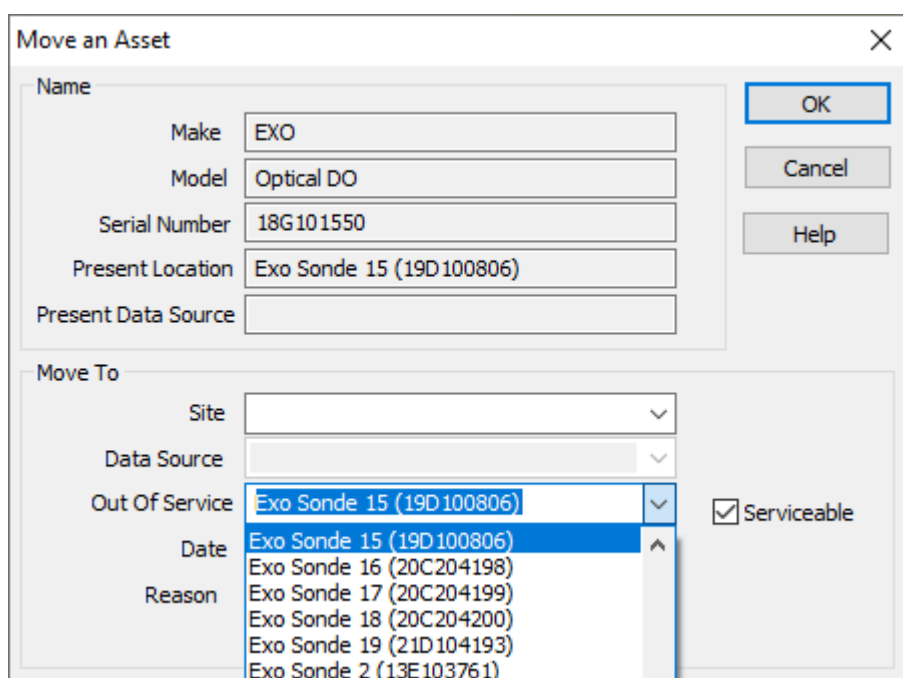
- Either select the Hydrosite name or the out of service location (e.g HRC Kiaranga)
- Select the date it was "moved"
- Tick serviceable unless it is faulty
- Entre a reason e.g. new, swapped in etc.

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Multiparameter e.g. EXO Sonde and AquaTROLL:

Individual sensors are loaded and stored in Assets as above and then stored in an out-of-service location named after the Sonde they are installed on.



The calibrations will be stored against the actual Sonde and the maintenance (for example DO cap or pH reference junction) will be stored against the sensor. Only the Sonde itself gets moved to a Hydro site, eg Teachers College once deployed.

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Calibration:

Instrument calibrations need to be stored in assets: (right click on the asset and chose edit)

Edit Asset ✕

Name

Category: ED -> Instruments -> WQ -> Sondes -> EXO Sonde Add New

Make: YSI EXO 3 Sonde

Model: YSI with Depth (100m)

Serial number: Sonde 7 (17E101335)

Location

Site or OOS Loc: Manawatu a

Data source:

Installation date: 29-Mar-2023

Details

Date purchased: 30-May-2

Purchased from: ENVCO

Purchase price: \$24925.

Label Code: HRC_002

Depreciation method: Straight

Expected lifetime: 10

Info URL:

External asset ID:

Portfolio: Water Quality Continuous

Comment: NEW, Purchased by Science

☐ Financial Asset ☐ Insured Criticality ☐

Health and safety risk:

Close

Save

Save As ...

Delete

Rename

Update Dates

Help

Add Calibration ✕

Make: YSI EXO 3 Sonde

Model: YSI with Depth (100m)

Serial Number: Sonde 7 (17E101335)

Last Calibrated: 22-Apr-2024 00:00:00

Calibration

Date Calibrated:

Comment:

Add a File: ...

Description:

☐ Add the comment to the Hilltop Comments Table if the asset is at a site

OK Cancel Help

Calibrated: 22-Apr-2024

Interval: 3.0 months

Interval: 1 months

New Calibration ...

Parameter instrument

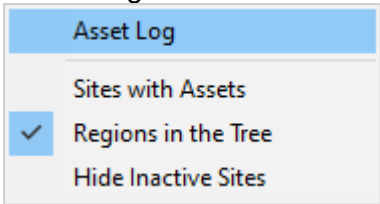
Sensor in a head unit:

- Click “New Calibration” to update an asset
- Enter the date calibrated
- Add a comment (e.g “checked and passed”)
- Add a calibration file (if just a check this is not needed)

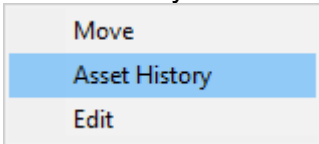
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Asset History:

Can view a log of all assets over time that have been to a site by right clicking on the site name and choosing “Asset Log”



Can view a log of where an asset has been or its calibrations by right clicking on an asset and selecting “Asset History”

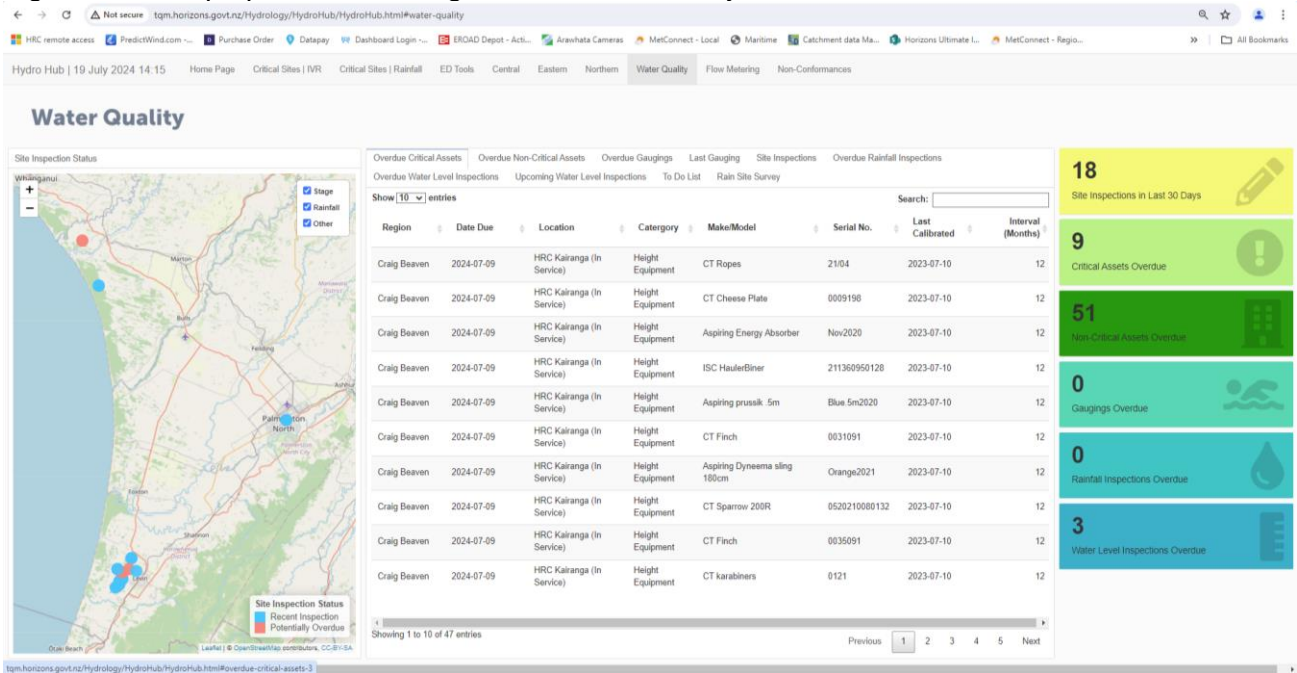




Reporting:

Assets requiring calibration should flag through the calibration reports or by Hydro hub:

- <http://tqm.horizons.govt.nz/Hydrology/HydroHub/HydroHub.html>
- [Critical Calibration report](#)
- [Non critical calibration report](#)

e.g: Please keep up to date and sign these off in a timely manner.



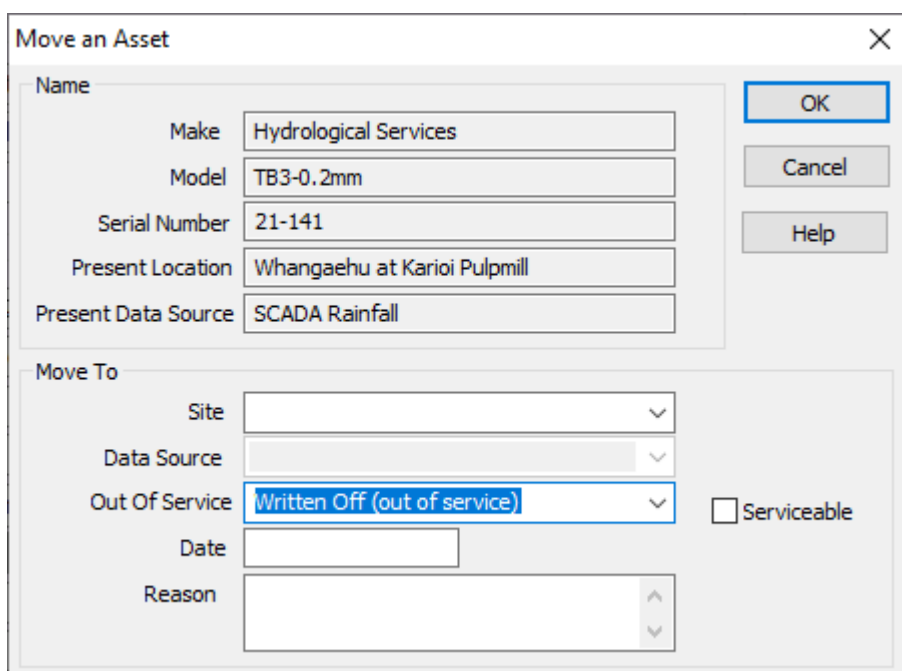
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Writing off an asset

When an asset is being disposed of (genuine end of life / retired / faulty)

1. Right click on the asset and select edit. Enter the Date Written off.
2. Click on “Change Location”



Move an Asset

Name

Make: Hydrological Services

Model: TB3-0.2mm

Serial Number: 21-141

Present Location: Whangaeahu at Karioi Pulpmill

Present Data Source: SCADA Rainfall

Move To

Site: [dropdown]

Data Source: [dropdown]

Out Of Service: **Written Off (out of service)** [dropdown]

☐ Serviceable

Date: [text box]

Reason: [dropdown]

Buttons: OK, Cancel, Help

3. Select the out of service location “Written Off (out of service)”