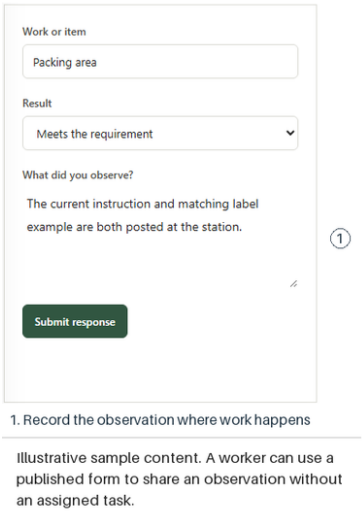
CAPTURE OR UPDATE AN ASSET RECORD

Help the team identify the right asset on the floor

Capture the tag, type, nameplate, location, criticality and photos in the asset record. Distinguishing details help colleagues recognize the equipment the record describes, even when similar assets share an area.

Capture the asset on the floor > Accept into the catalog

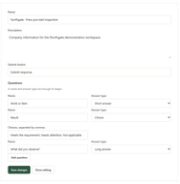
SkillSmith · Share an observation through a published form



1. Record the observation where work happens

Illustrative sample content. A worker can use a published form to share an observation without an assigned task.

SkillSmith · Configure work-item, result and observation questions



SkillSmith · Inspect what the CMMS source is prepared to import



Share an observation through a published form

Pay only when you see results

Agree the outcome for your first workflow with our team.

SELECTED CLIENTS FEATURED BY SKILLSMITH

verizon · KEYSIGHT TECHNOLOGIES · AMERICAN EAGLE · Berkeley UNIVERSITY OF CALIFORNIA

YOUR TEAM / THE DECISIONS THAT MATTER

The people involved in the working method

Each role has a defined contribution. Your team selects the people responsible for those parts of the work.

Your role	The contribution	SkillSmith support
Assigned team member	Capture the asset on the floor	Respond with criticality, location, nameplate and photos.
Accountable owner	Accept into the catalog	Respond with accepted / returned and catalog updated.

Add the details that distinguish similar assets

In a worked example, two similar assets are in the same area; record the distinguishing identity before submitting a new or updated asset record.

WORKED DECISION

Decision point	Information to use	Responsible next step
Working material	Record form and Reward catalog	Open the selected material for this occurrence.
Recorded response	tag, type and nameplate	Save the response with its work context.
Review point	criticality and photos	Agree the next action with the person responsible for this decision.

Review the selected material, this occurrence's response and any conditional follow-up.

CONNECTED WORK / PREPARED PLAYBOOKS

Capture or update an asset record

Bring record form and reward catalog into the prepared work. Assigned team member and Accountable owner each receive the context needed for their part.

01 Capture the asset on the floor

Record tag, type, nameplate, location, criticality and photos.

02 Accept into the catalog

Record accepted / returned and catalog updated.

Prepare the useful part of the workflow

Use the prepared sequence with the resources and responsibilities selected for your team.

Capture or update an asset record

New or changed equipment is recorded on the floor with a stable tag, photos and location, and the asset owner accepts it into the catalog that every check, PM and work order points at.

New equipment intake · Maintenance

YOUR INFORMATION / CONNECTED WORK

The materials that make this method usable

Keep the relevant material available at the point it is used. The resource choices below support different parts of the work.

Your work context > SkillSmith > Your next contribution



Record form The task uses this material	The asset record form.
Reward catalog The task uses this material	The asset catalog the record is written into.
Taxonomy The task uses this material	Naming and criticality rules.

YOUR DELIVERY PLAN / OUR TEAM

Prepare the first useful playbook

Start with the materials and people you already have. We help make the setup choices explicit before your team uses the method.

01 Select the working material

Choose record form and reward catalog from the resources your team uses.

02 Agree the responsibilities

Confirm assigned team member and accountable owner for this method, then choose the people eligible to receive its work.

03 Walk through the selected route

Choose the task, eligible recipients and deadline, then walk through the actual response fields.

We are here to help



Rohit Singh
VP of Strategic Partnerships



Brent Jackson
Director of Customer Success

Prepare the method for your team

What stays with the recorded response?

The response for this occurrence retains tag, type, nameplate, location, criticality and photos. It belongs to the work being reviewed, rather than replacing a different occurrence's record.

Which materials do we need to bring?

Bring record form and reward catalog. We use those choices to prepare the working context, then check that each task opens the material it needs.

How do people receive the prepared work?

Select the prepared task and the relevant recipients when assigning work. Making a playbook available to a group and giving a person a task are separate setup choices.

What is the outcome for the wider workflow?

Record accepted with a stable ID; catalog updated.

WHY SKILLSMITH / YOUR NEXT STEP

Bring your work; we help prepare the method

We work with your team to organize the source material, responsibilities and review choices. Start with one useful example, then carry the agreed method into everyday work.

Without connected follow-through	With SkillSmith
The person has to leave the work to find its instructions or help.	Open the selected resources with the task, and keep a question attached when help is needed.
The current status hides which response or version came before it.	Keep tag, type and nameplate with the work, with recorded history available for later review.

Walk through this method with us

Bring one real example and the material your team uses. We will walk through the task sequence and the decision that matters to you.

- Which identifying details and location belong to the asset being recorded?
- The resource choices for this method
- Each responsible person's response
- The conditional route and wider outcome

Request a demo

skillsmith.com/contact