



## Asset Manager Guide

The equipment desk — inventory, requests, assignments

Analytical Engines Ltd.

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Dashboard

My workplace

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INVENTORY · 8 UNITS · 2 AVAILABLE · 5 ASSIGNED · 3 PENDING

Equipment

AVAILABLE

ASSIGNED

RETIRED

My equipment

Inventory

Requests

Search name, serial, holder... TYPE All types STATUS All Available Assigned Retired 8 OF 8 SHOWN

| ASSET                     | TYPE        | STATUS    | SERIAL       | HOLDER                  | ISSUED      |               |
|---------------------------|-------------|-----------|--------------|-------------------------|-------------|---------------|
| MacBook Pro 14" AST-17    | Laptop      | ASSIGNED  | C02FK3ABMD6T | AL Ada Lovelace         | 12 Mar 2026 | Return Retire |
| Dell 27" Monitor AST-42   | Monitor     | ASSIGNED  | CN8MON4277   | AL Ada Lovelace         | 12 Mar 2026 | Return Retire |
| ThinkPad X1 Carbon AST-3  | Laptop      | AVAILABLE | PF32X1A9     | - In stock              | -           | Assign        |
| iPhone 14 AST-9           | Phone       | ASSIGNED  | F2LWX9KPHN   | MF Michael Faraday      | 02 Apr 2026 | Return Retire |
| USB-C Dock AST-21         | Peripheral  | ASSIGNED  | DK21-4477    | CD Charles Darwin       | 06 May 2026 | Return Retire |
| Keycard #88 AST-88        | Access card | ASSIGNED  | -            | FN Florence Nightingale | 20 Jan 2026 | Return Retire |
| Galaxy Tab S9 AST-2       | Tablet      | AVAILABLE | RF8T2ABTA8   | - In stock              | -           | Assign        |
| Latitude 5490 (old) AST-1 | Laptop      | RETIRED   | DLAT-0001    | - In stock              | -           | Retired       |

Isambard KL... ASSET MGR

For users with the **Asset manager** role. It builds on the Employee Web Guide — the employee side of Equipment is documented there.

Applies to HR.Click Web · Document v1.1 · August 2026

# Running the equipment desk

## 1 Your role in two minutes

As an **asset manager** you run the equipment desk: the inventory of company hardware, and the queue of employee requests to get, return or retire it. Your sidebar card reads **ASSET MGR**; the **Equipment** entry carries the pending-request count, and the page gains two tabs beyond “My equipment”: **Inventory** and **Requests** (the Requests tab appears while something is pending, and the page opens straight on it).

### ASSET TYPES

The catalogue of asset *types* (Laptop LTP, Phone PHN, Monitor MON, Keycard KEY...) defines the icons and the inventory-code prefixes. Its editing tab is on the administrators' side — ask your admin to add a type if a new category appears.

## 2 Inventory

One row per physical unit: name, type, **status** (*Available* — in stock, *Assigned* — with a holder, *Retired*), serial, holder and issue date. Rows sort by holder (last name, first name) then asset name, so one person's kit lists together; unassigned units sort last. Search by name/serial/holder, filter by type, and by either status or holder (picking a holder narrows to their kit and hides the status filter, since it would otherwise conflict).

- **Add asset** — record a new unit: type, name, serial, and an **inventory code** — **Generate** issues the next number for the type's prefix (e.g. *LTP-00018*). A new unit enters stock as *Available*, so it also needs a **stock location** — the office it physically sits in.
- Click a row to open the **asset record**: its details plus the full **history timeline** — every assignment, return and request the unit has been through.
- Row actions by status: *Available* → **Assign**; *Assigned* → **Return** / **Retire**. **Return** also asks for the stock location the unit is going back to; **Retire** doesn't, since the unit leaves stock. Retiring is permanent; a note explains why.

| ASSET                              | TYPE        | STATUS    | SERIAL       | HOLDER                  | ISSUED      |
|------------------------------------|-------------|-----------|--------------|-------------------------|-------------|
| MacBook Pro 14 <sup>+</sup> AST-17 | Laptop      | ASSIGNED  | C02FK3ABMD6T | AL Ada Lovelace         | 12 Mar 2026 |
| Dell 27" Monitor AST-42            | Monitor     | ASSIGNED  | CN0M0N4277   | AL Ada Lovelace         | 12 Mar 2026 |
| ThinkPad X1 Carbon AST-3           | Laptop      | AVAILABLE | PF3ZX1A9     | - In stock              | -           |
| iPhone 14 AST-9                    | Phone       | ASSIGNED  | F2LWX9KPHN   | MF Michael Faraday      | 02 Apr 2026 |
| USB-C Dock AST-21                  | Peripheral  | ASSIGNED  | DK21-4477    | CD Charles Darwin       | 06 May 2026 |
| Keycard #88 AST-88                 | Access card | ASSIGNED  | -            | FN Florence Nightingale | 20 Jan 2026 |
| Galaxy Tab S9 AST-2                | Tablet      | AVAILABLE | RF8T2ABTAB   | - In stock              | -           |
| Latitude 5490 (old) AST-1          | Laptop      | RETIRED   | DLAT-0001    | - In stock              | -           |

**Figure 1** — The inventory — statuses, holders, and the request badge.

**Assigning directly:** pick the holder from the directory, add an optional note, done — the unit flips to *Assigned* and appears in the employee’s “My equipment”. The note is kept on the assignment and shown on the “Assigned” step of the unit’s history. Use it when gear is handed out without a request.

Every movement (created / assigned / returned / retired) is written to the audit log and fires the matching webhook event, so external inventories can stay in sync.

If a holder or a stock location is later removed from HR.Click, the inventory keeps showing the record rather than breaking — the name is suffixed “(deleted)” so it still reads clearly.

### Assign equipment

Hand this unit to a person. It moves to Assigned and shows on their My equipment page from the issue date.

**ThinkPad X1 Carbon**  
Laptop · PF3ZX1A9 · LTP-00003

ASSIGN TO · **REQUIRED**

Isaac Newton · isaac.newton@example.com

NOTE · **OPTIONAL**

Charger and sleeve included — imaged with the standard analytics build.

Cancel
Assign

**Figure 2** — Assign — holder + note.

AST-17

Asset record

**MacBook Pro 14"**  
 Laptop · C02FK3ABMD6T  
ASSIGNED

TYPE

LAPTOP

MONITOR

PHONE

PERIPHERAL

ACCESS CARD

TABLET

HEADSET

MODEL / NAME · REQUIRED

MacBook Pro 14"

SERIAL NUMBER

C02FK3ABMD6T

INVENTORY CODE

LTP-00017

Generate

|                                           |                                                |
|-------------------------------------------|------------------------------------------------|
| <div>STATUS</div> <div>ASSIGNED</div>     | <div>INVENTORY CODE</div> <div>LTP-00017</div> |
| <div>SERIAL</div> <div>C02FK3ABMD6T</div> | <div>ISSUED</div> <div>12 Mar 2026</div>       |

CURRENT HOLDER

AL

**Ada Lovelace**  
 COMPUTING · LONDON HQ

HISTORY

↔

**Assigned · Ada Lovelace**  
 by Isambard Kingdom Brunel  
 Issued the 14" MacBook — enrolled in MDM.

12 Mar 2026

+

**Requested equipment**  
 by Ada Lovelace  
 New starter kit for the analytics rig.

10 Mar 2026

+

**Catalogued into inventory**  
 by Isambard Kingdom Brunel

01 Feb 2026

Return

Retire

Close

Save changes

**Figure 3** — The asset record — details and lifecycle history.

### 3 The Requests queue

Employees send three kinds of requests (each with their written reason):

| KIND   | YOUR ACTION                                | WHAT HAPPENS                                                                                                                                                                                                                                                                                                                                                                     |
|--------|--------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New    | <b>Approve</b> , then <b>Assign device</b> | <b>Approve</b> only confirms the ask — it moves to a separate “Approved · awaiting hardware” list and the employee’s tracker reads “Awaiting hardware”. Once a unit is ready, <b>Assign device</b> opens the fulfil dialog to pick a free unit from stock (or record a new one on the spot); confirming assigns it to the requester and closes the request as <i>Fulfilled</i> . |
| Return | <b>Confirm return</b>                      | The assignment closes; the unit goes back to <i>Available</i> at the stock location you record when confirming. Until you confirm, the item remains the employee’s responsibility.                                                                                                                                                                                               |
| Retire | <b>Confirm retire</b>                      | The assignment closes and the unit is <i>Retired</i> (broken / lost / stolen), with the reason kept on the record.                                                                                                                                                                                                                                                               |

**Deny** is always available — including on a New request already sitting in “Approved · awaiting hardware”, if sourcing falls through — **a written reason is required**, and the employee sees it in their request tracker. Decided requests stay in “Recently decided” (last 30 days) with who decided and the note.

Dashboard

My workplace

Time report

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HR > EQUIPMENT > REQUESTS

Q Jump to...

EN 13:45:00 THU

INVENTORY · 8 UNITS · 2 AVAILABLE · 5 ASSIGNED · 3 PENDING

Equipment

+ Add asset

My equipment

Inventory

Requests 3

QUEUE 3 AWAITING THE ASSET DESK

| REQUESTER          | REQUEST             | ITEM       | DETAILS                                          | WHEN        |                     |
|--------------------|---------------------|------------|--------------------------------------------------|-------------|---------------------|
| AL Ada Lovelace    | COMPUTING · L + NEW | Headset    | Noise-cancelling headset — open-plan focus work. | 09 Jul 2026 | Deny Approve        |
| CD Charles Darwin  | NATURAL HIS RETURN  | USB-C Dock | Moving to the analytics team.                    | 09 Jul 2026 | Deny Confirm return |
| MF Michael Faraday | ELECTRICAL RETIRE   | iPhone 14  | Cracked screen — battery swelling.               | 08 Jul 2026 | Deny Confirm retire |

APPROVED · AWAITING HARDWARE 1 TO HAND OVER

| REQUESTER          | ITEM               | DETAILS                               | APPROVED                                  |                    |
|--------------------|--------------------|---------------------------------------|-------------------------------------------|--------------------|
| MS Mary Somerville | MATHEMATIC Monitor | Second monitor for the modelling rig. | 09 Jul 2026<br>by Isambard Kingdom Brunel | Deny Assign device |

RECENTLY DECIDED 2 CLOSED

| REQUESTER       | REQUEST | ITEM               | STATUS    | DECIDED                                   | NOTE                                       |
|-----------------|---------|--------------------|-----------|-------------------------------------------|--------------------------------------------|
| Isaac Newton    | + NEW   | ThinkPad X1 Carbon | FULFILLED | 09 Jul 2026<br>by Isambard Kingdom Brunel | Provisioned LTP-00051 and enrolled in MDM. |
| Mary Somerville | + NEW   | Monitor            | DENIED    | 08 Jul 2026<br>by Isambard Kingdom Brunel | One monitor per desk policy.               |

Isambard KL...

ASSET MGR

**Figure 4** — The queue — three kinds, per-kind actions, recent decisions below.

**Assign device** on an approved “new” request opens this dialog: pick an existing *Available* unit of the right type, or catalogue one inline (with a generated inventory code). Confirming assigns it to the requester and closes the request as *Fulfilled*.

**Figure 5** — Fulfil — pick a unit from stock or record a new one.

## 4 How you're notified

| SUBJECT / TITLE                                                                  | WHEN                                                                                              |
|----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|
| <b>Equipment request: &lt;item&gt;</b><br>(e-mail: "Equipment request — <item>") | An employee submitted a new / return / retire request — all asset managers and admins are pinged. |
| <b>Equipment request fulfilled / denied</b>                                      | What the requester receives after your decision, including your note.                             |

When someone leaves the company, the admin offboarding wizard returns their equipment in bulk through the same return path — check the inventory afterwards for anything that needs servicing or retirement.

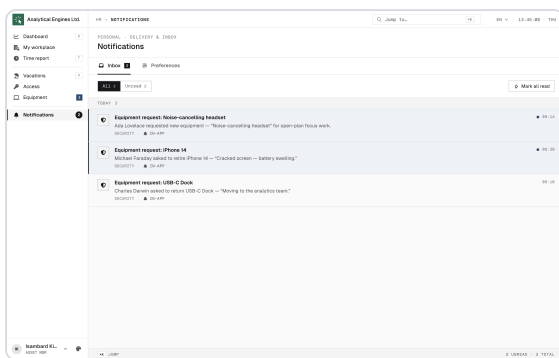


Figure 6 — Request events in your inbox.

## 5 Day-to-day checklist

| SITUATION                          | WHAT TO DO                                                                                                                                                                                             |
|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| "Equipment request" arrives        | Requests tab → read the reason → Approve (New) / Confirm (Return, Retire), or Deny with a note.                                                                                                        |
| New hardware delivered             | Inventory → <b>Add asset</b> per unit → <b>Generate</b> the code and set the stock location → stick the label on the device. Awaiting an approved New request? Use <b>Assign device</b> on it instead. |
| Handing gear out without a request | Inventory → the unit → <b>Assign</b> → pick the person, note the condition.                                                                                                                            |
| "Where has this laptop been?"      | Open the asset record — the history timeline lists every holder and request.                                                                                                                           |
| Device broken / lost               | Employee files a Retire request (or you retire directly from the row) — the reason stays on the record.                                                                                                |
| Employee leaving                   | Offboarding (admin wizard) returns their items; verify their state in Inventory afterwards.                                                                                                            |

