

PSTRAX SUCCESS GUIDE: ASSETS MODULE

These checklists are designed to help you implement PSTRax successfully, from initial setup to full deployment. Remember that we're here every step of the way, so feel free to reach out with any questions or adjustments.

» PHASE I: Review & Fine-Tune the System

- **Complete admin training.** Go to **Help > Admin Training > Assets Module Training** to explore admin training tutorials. Or sign up for one of our deep-dive webinars [here](#).
- **Verify Assets List.** Go to **Assets > Assets List** and ensure all equipment is in the system. You can edit, add, or remove assets (and asset types) as needed. [Learn more](#).
- **Set up alert recipients.** Alert recipients can be set by asset type to ensure that appropriate users receive notifications when issues arise. Go to **Settings > Assets > Alert Recipients** to set up. [Learn more](#).
- **Set up events** – Go to **Settings > Assets > Events** to build and edit inspections for the different asset types. You can set intervals, create admin-only events, enable a check-all function, modify tasks, and more. Then set due dates by selecting the gear on **Assets > Assets List** and clicking **Batch > Schedule Event**. [Learn more](#).
- **Set up Locations.** Locations are areas where you can assign your assets (Station 1 Bay, Tool Shed, etc.). In order to assign assets to certain locations – in addition to assigning to vehicle and/or users – go to **Settings > Assets > Locations**.
- **Log an Assets inspection.** From **Assets > Assets List**, select an asset and click **Actions > Log Event** on a vehicle from the Station Home screen. Identify the gear, log tasks and set fake alerts to get used to the workflow. Note any adjustments you'd like to make. [Learn more](#).
- **Update and close an alert.** After setting an alert, add comments, change gear status, log a repair event, and more from the Station Home screen (click the **Assets** tab on the **ALERTS** panel), or from **Assets > Alerts > Open Alerts > Actions**. [Learn more](#).
- **Set up status report recipients.** The Assets status report is a monthly email that summarizes upcoming inspections and activities. Go to **Settings > Personnel > User List > Edit > Assets Status Email** to add recipients. [Learn more](#).
- **Adjust system settings.** The following options can be adjusted by our team to match your preferences. Please let us know if you'd like to make changes.

- **Status email time** – This report is sent once a month on the 15th, but can be adjusted to send monthly on the 1st or weekly each Monday. [Learn more](#).
 - **General alerts** – General alerts are not tied to a specific piece of gear and are seen by everyone. By default, PPE Users can't set general alerts, but that can be changed. [Learn more](#).
 - **Add custom alert fields** – Up to three custom fields can be added to all Assets alerts, so you can gather more information for reporting or operational needs. [Learn more](#).
 - **On-truck check options** – There are two options for scheduling inspections on vehicle-assigned assets: having admin assign assets to trucks, or having users verify the actual assets present during their truck checks. [Learn more](#).
 - **Review best practices.** Don't reinvent the wheel! Check out our Knowledge Base to see how other organizations are using PSTrax to track their asset checks & inventories. [Learn more](#).
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» PHASE II: Roll-Out to Your Crews

- **Verify user access.** Go to your **Settings > Personnel > User List** to make sure all users who should have access to the Assets module are listed in PSTrax, and have the correct [permission levels](#).
 - **Send login information to users.** You should have received username and password information from your Build Manager, but you can access it again from the **User List**. Pass this along to each user when you're ready to have them access the system.
 - **Provide training materials to users.** Once they log into PSTrax, have users go through a step-by-step training checklist to learn the module in detail (**Help > User Training > Assets User**). You can also post our [Assets User Training Videos](#) into your training platform ahead of time.
 - **Have users log checks and report findings.** Have a handful of users log an assets check from the Station Home screen or the Assets List. Any adjustments should be passed along to an Assets Admin to review.
 - **Make adjustments.** After identifying adjustments, make the corrections yourself (if you feel comfortable), or collaborate with your Build Manager to facilitate the necessary changes. Note that you may require multiple rounds of adjustments as you get input from more users.
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» PHASE III: Go-Live with PSTrax

- **Pick a day to go-live.** It's helpful if you let us know what date you choose at least a few days in advance so we can prep on our end. Note that you **DO NOT** have to go live with all modules at the same time. Some agencies prefer to roll-out the modules in phases.
- **Clear out test data & reset schedules.** We'll help you delete your test logs and alerts, if applicable. None of the settings changes you've made (checklist adjustments, equipment edits, etc.) will be affected. Your schedules can be reset to start on or after your go-live date.