# Table of Contents

**INTRODUCTION**.............................................................................................................................................. 5

**CHAPTER 1: EQUIPMENT PROFILE SCREEN** .................................................................................................... 6

  - **CHAPTER 1 Part 1 Equipment Profile Screen** ............................................................................................. 6
    - Title Block .................................................................................................................................................. 6
    - Location Block .......................................................................................................................................... 6
    - Shop Block ............................................................................................................................................... 6
    - Contractor Block ...................................................................................................................................... 6
    - Picture Block .......................................................................................................................................... 7
    - Status Block .......................................................................................................................................... 7
    - Equipment Profile View/Select: Extra Description .................................................................................. 7
    - Equipment Profile View/Select: Reference Data .................................................................................... 7
    - Equipment Profile View/Select: Attributes ............................................................................................ 7
    - Equipment Profile View/Select: Relocation ............................................................................................ 7
    - Equipment Profile View/Select: Parts List ............................................................................................... 7
    - Equipment Profile View/Select: Account Setup ...................................................................................... 8
    - Equipment Profile View/Select: Warranty ............................................................................................... 8
    - Equipment Profile View/Select: Active PM Templates ........................................................................ 8
    - Equipment Profile View/Select: Equipment Meter ................................................................................ 8
    - Equipment Profile View/Select: Sales Price History ........................................................................... 8
    - Equipment Profile View/Select: Notes Log ............................................................................................. 8
    - Equipment Profile View/Select: User Defined Field .............................................................................. 9
    - Equipment Profile View/Select: Status History ..................................................................................... 9
    - Equipment Profile View/Select: Related Documents ........................................................................... 9
    - Equipment Profile View/Select: GIS Linkage ......................................................................................... 9
  - **CHAPTER 1 Part 2, Equipment Profile Step-By-Step Quick Guide** .............................................................. 9
    - Creating an Equipment Profile ............................................................................................................. 9

**CHAPTER 2: EQUIPMENT RENTAL SCREEN** .................................................................................................. 11

  - **CHAPTER 2 Part 1 Equipment Rental Conceptual Guide** ........................................................................ 11
    - Title Block ............................................................................................................................................. 11
    - Equipment Block ................................................................................................................................... 11
    - Dates Block .......................................................................................................................................... 11
    - Status Block ...................................................................................................................................... 11
    - Work Order Block ............................................................................................................................... 11
  - **CHAPTER 2 Part 2 Equipment Rental Step-By-Step Quick Guide** ............................................................ 12
    - Creating an Equipment Rental .......................................................................................................... 12

**CHAPTER 3: EQUIPMENT RENTAL APPROVAL** ............................................................................................. 13

  - **CHAPTER 3 Part 1 Equipment Rental Approval Conceptual Guide** ....................................................... 13
    - Equipment Rental Approval Block ..................................................................................................... 13
  - **CHAPTER 3 Part 2 Equipment Rental Approval Step-By-Step Quick Guide** ......................................... 13
    - Creating an Equipment Rental Approval Screen .................................................................................. 13

**CHAPTER 4: EQUIPMENT RENTAL ADJUSTMENT** .......................................................................................... 14

  - **CHAPTER 4 Part 1 Equipment Rental Adjustment Conceptual Guide** .................................................... 14
    - Title Block ........................................................................................................................................... 14
    - Equipment Block .................................................................................................................................. 14
    - Dates Block ......................................................................................................................................... 14
    - Status Block ...................................................................................................................................... 14
    - Work Order Block ............................................................................................................................. 14
APPENDIX 1: ASSET MANAGEMENT MODULE SETUP GUIDE

1. EQUIPMENT GROUP .................................................................29
   Active Block..............................................................................29
   Attributes Block ....................................................................29
   Attributes Definition Block...................................................29
2. EQUIPMENT STATUS.........................................................30
   Active Block..............................................................................30
   Workflow Block.......................................................................31
   Optional Roles........................................................................31
3. ASSET GROUP .................................................................31
   Title Block...............................................................................31
   Active Block..............................................................................31
   Attributes Block ....................................................................32
   Validation Block .....................................................................32
4. RENTAL RATE TYPE..........................................................32
5. ASSET STATUS .................................................................33
   Active Block..............................................................................33
   Asset Type Block ....................................................................33
   Workflow Block.......................................................................34
6. ASSET TYPE........................................................................35
7. MANUFACTURER .............................................................35
   Contact Information Block......................................................35
Introduction

This User Guide is designed to help the user understand the functionality of the Asset Management module. It explains the module from a conceptual standpoint and it offers step-by-step instructions to help the user learn how to quickly enter data and save records to the system.

Each chapter is specific to one screen in the module and contains Parts 1 and 2 as follows:

Part 1: The conceptual Part I explains the screen as well as its functionality throughout the system.

Part 2: The step-by-step Part II is a guide to creating transactions and performing tasks while working in the screen.

The Appendix at the end of the guide explains each of the setup screens for configuring the validated data that will be made available in the drop-downs and lists within the module as a whole.
Chapter 1: Equipment Profile Screen

Chapter 1 Part 1 Equipment Profile Screen

The AiM Equipment Profile represents a logical structure for Equipment management within the AiM application. Equipment is defined in the Equipment Profile screen, and is widely used throughout the system in modules, such as Work Management.

**Title Block**
The equipment profile title block identifies the unique equipment ID and description.

**Location Block**
The location block defines the installed location within the property hierarchy. If the item is not installed, but available through inventory supply, then warehouse / bin can be specified. It is possible for the equipment to be issued for use or to be stored in a warehouse or garage when not in use.

**Shop Block**
The shop block defines the shop and the shop person who is responsible for the equipment. If the equipment is on a preventive maintenance route, the route and sequence can be entered here. Depending upon the preventive maintenance setup, this entry can also be used as a means of defaulting assignment of PM work to this shop.

**Contractor Block**
The contractor block identifies the contractor and the contractor address code for the contractor who is providing services or who is responsible for the equipment. If the equipment is included in a service contract, it can be specified here. Depending upon the preventive maintenance setup, this entry can also be used as a means of defaulting assignment of PM work to this contractor.
**Picture Block**
The picture block supports an equipment image to assist with identification and familiarization. Images must first be defined in the document repository and are then available for selection in the picture block.

**Status Block**
In this block, the status, which describes the current condition of the equipment, is specified. If the equipment is part of a defined equipment group, the equipment group may be specified. Whether or not the equipment is rentable is also noted here. If the equipment requires a lock out / tag out procedure while being serviced, this is indicated here.

**Equipment Profile View/ Select: Extra Description**
The Extra Description block provides 4000 characters to further describe the parent record. This information is included in the parent record's search screen and is ideal if the basic 255 character Description field on the Equipment Profile screen is insufficient.

**Equipment Profile View/ Select: Reference Data**
The reference data screen displays additional relevant information regarding equipment. This information can be used to help manage the asset profile or for reporting and analysis.

- **Classification Block:** The classification block associates an inventory part profile with the equipment profile. An equipment serial number may also be assigned in this block.
- **Manufacture Block:** The manufacturer block provides an area to record manufacturer and the manufacturer part/model number for the equipment.
- **Parent Block:** When the equipment is a component or child of another piece of equipment, the parent equipment is specified in the parent block. For the parent equipment specified, the parent equipment group will be displayed.
- **Sales Price:** This block specifies the original cost of the equipment. The sales price is defined for use when issuing equipment items from inventory. The history of this sales price is also maintained.

**Equipment Profile View/ Select: Attributes**
The Attribute screen contains equipment specific values for each attribute. Available attributes are defined in the equipment item's Equipment Group screen.

**Equipment Profile View/ Select: Relocation**
The Relocation screen shows the history of an equipment item location. Items are assigned new property location values through the Relocation screen. This action builds a historical trail of where equipment has been in use.

**Equipment Profile View/ Select: Parts List**
The parts list is helpful to keep the actual inventory parts needed to keep the equipment maintained. Specific counts and sizes may be identified here.
**Equipment Profile View/ Select: Account Setup**
The Account Setup screen associates an item to a charge account, or more than one account if the transaction costs are split. These accounts will collect charges from work order phases by default when equipment is associated to the phase and the equipment funding source is selected.

**Account Setup**:  The detail portion of the screen, called Charge, is where one or more of these accounts are set up. The account, its subcode and subledger are specified here.

**Dates Block**: Specifies the active period of the equipment account during which charges may be posted to it. When an expiration date is specified, the account will expire on that date and no costs can be posted after that date. Both the start date and expiration date are optional.

**Equipment Profile View/ Select: Warranty**
The Warranty screen identifies reference details regarding an equipment warranty. Any active warranty will appear on the work order phase as a warning if the equipment item is on the phase.

**Contractor Block**: The contractor block identifies the contractor responsible for providing warranty services or repairs to the asset / equipment item.

**Terms Block**: The warranty terms block identifies the period of the warranty, user-specified notes on the terms of the warranty (e.g., "10 years or 100,000 miles whichever comes first"), and an optional description of the warranty.

**Equipment Profile View/ Select: Active PM Templates**
The Active PM template screen displays the active preventive maintenance templates on which this equipment is included. To modify this screen, modify a PM template by either adding or removing the equipment from the PM template.

**Equipment Profile View/ Select: Equipment Meter**
The equipment meter screen displays the equipment meters associated with the equipment item.

**Equipment Meter Block**: This block displays the equipment meters associated with the equipment and information pertaining to the meter ID, meter description, unit of measure, the rollover point, rollover count, estimated units per day, last reading day, and the amount of the last reading for an equipment meter.

**Status Block**: This block displays the status which describes the current condition of the equipment and if the equipment is part of a defined equipment group.

**Equipment Profile View/ Select: Sales Price History**
Sales price history is a history of the sales price of a specific equipment item.

**Sales Price Block**: This block supports the entry of specific sales prices over time for analysis, management, and reporting.

**Equipment Profile View/ Select: Notes Log**
The Notes Log supports the management of additional notes regarding a specific record. This is a great way to keep a dated running commentary on a specific record in the system.

**Notes Log Entry Block**: This allows the author to enter up to 2000 characters of free-form text in each log created. The note may be further classified by selecting a note type. The entry date and login are automatically defaulted and associated to the note and may not be modified after the note is saved.
Work Desk Block: The notes log WorkDesk block identifies whether or not the notes log(s) will be available in the WorkDesk notes log content channel. Additionally, these notes may be filtered according to a unique note type to avoid extraneous notes from appearing on the WorkDesk.

AiM provides a search and navigation bar to enter criteria for the quick retrieval of notes over time.

**Equipment Profile View/ Select: User Defined Field**
User defined fields (UDFs) provide the ability to create fields for data entry not provided in the baseline system. UDFs must be built in the system administration module for the module screen where the UDF will be employed. The UDF can be linked to a validation table so the user selects values from a pre-defined list. The UDF may even be marked as required to complete a record. User defined fields create additional customized reporting and management capabilities.

**Equipment Profile View/ Select: Status History**
Status history provides a view-only record of statuses over time. Status history is automatically updated as statuses change and cannot directly be edited within the status history screen. The status editor and date are included as a part of this history.

**Equipment Profile View/ Select: Related Documents**
The related documents function allows the user to attach any electronic record, such as a document, spreadsheet, or image from the document repository to the record. Related documents can also be a URL (web) shortcut.

**Equipment Profile View/ Select: GIS Linkage**
The GIS linkage view defines the GIS layer that will display the equipment item.

GIS Layer Block: This block indicates the GIS layer that will display the equipment item as defined in the system administration GIS setup.

**Chapter 1, Part-2, Equipment Profile Step-By-Step Quick Guide**

This step-by-step quick guide is intended to help a user navigate successfully through completing and saving a record.

**Creating an Equipment Profile**

1. Click the New icon to enter a new Equipment Profile.
2. Click in the Description block to enter a required description.
3. Enter the location of the equipment either in a property or warehouse. *(Note: Though this field is not highlighted in red, a location is required to save the equipment record.)*
4. Click to enter the status of the equipment.
5. If the equipment is to be rentable set this field to Yes. If not, leave the default setting at No.
6. If the equipment needs a lockout/tagout procedure set the field to Yes. If not, leave the default setting at No.
7. Click to select the equipment group.
8. Click on the save record icon to save the record.
Optional: Select a Shop

1. Click the database icon to reveal a list of shops available for selection. Click to select a shop responsible for the equipment item.
2. Via wizard, the shop person list appears next. If the user does not want to assign a shop person to this piece of equipment, click on the green done flag and the shop only will be populated.

Optional: Select a Contractor

1. Click the database icon to reveal a list of contractors available for selection. Click to select the appropriate contractor.
2. Via wizard, the shop person list appears next. If the user does not want to assign a shop person to this piece of equipment, click on the green done flag and the shop only will be populated.
Chapter 2: Equipment Rental Screen

Chapter 2 Part 1 Equipment Rental Conceptual Guide

The equipment rental screen creates and records equipment rental transactions.

Title Block
The equipment rental title block displays the system generated rental transaction ID and an optional description of the rental.

Equipment Block
The equipment block identifies the equipment being rented and the rate type being used (weekly, daily, hourly, etc...). This block also displays the rental rate for the rate type selected.

Dates Block
The dates block specifies the pickup date and time of the rental and the estimated and actual return date and times. The return dates affect whether the item profile status is available or rented.

Status Block
The status block displays the equipment rental status and the total cost of the rental. Equipment rental transaction must be approved before the cost is posted.

Work Order Block
The work order block specifies the supported work order and work order phase for which the equipment is being rented. Also recorded here is who released and returned the equipment.
Chapter 2 Part 2 Equipment Rental Step-By-Step Quick Guide

This step-by-step quick guide is intended to help a user navigate successfully through completing and saving a record.

Creating an Equipment Rental

1. Click the New icon to create a new equipment rental record.
2. Type in a description to help identify the type of equipment that needs to be rented.
3. Click to Select the equipment group.
4. Click to Select the equipment that needs to be rented.
5. Click to Select the rate type.
6. Click to Select the pickup date.
7. Click to Select the pickup time.
8. Click to select the estimated return date.
9. Click to select the estimated return time.
10. Click to Select the work order.
11. Click to Select the phase of the work order.
12. Click to select who will be picking up the Rental.
13. Click on the save icon.

After the Rental is complete:

1. Click to select the actual return date.
2. Click to select the actual return time.
3. Click to select who returned the rental.

The completed rental is now ready for approval, so that costs can post to the work order phase.
Chapter 3: Equipment Rental Approval

Chapter 3 Part 1 Equipment Rental Approval Conceptual Guide

The Equipment Rental Approval screen allows for the approval (or rejection) of individual equipment rentals. An approved record creates a financial transaction applying charges to the work order phase. To retrieve pending rental records, the user would first perform a search to return any pending rental requests for approval.

Equipment Rental Approval Block

Equipment rentals may be approved (or rejected) using the Select All feature for all equipment rentals or approved by all equipment rentals per work order phase, or approved per individual equipment rental transaction.

Chapter 3 Part 2 Equipment Rental Approval Step-By-Step Quick Guide

This step-by-step quick guide is intended to help a user navigate successfully through completing and saving a record.

Creating an Equipment Rental Approval Screen

1. Create search criteria to limit the returns of equipment rentals that need to be approved. If the user wants to see all rentals, click on the magnifying glass without creating search criteria.
2. Click in the check box to select rentals for Approval. If the user wants to approval all rentals, click the select all box.
3. To approval the rentals and post the transactions, click on the green checkmark.
4. To reject a rental record click on the red X.
Chapter 4: Equipment Rental Adjustment

Chapter 4 Part 1 Equipment Rental Adjustment Conceptual Guide

To make adjustments to rental records, use the Equipment Rental Adjustment screen. Adjustments to the Equipment Group, Equipment ID Rate Type, any of the dates in the Dates block and Work Order block can be made to a previously approved record. Based on new data, AIM will automatically calculate the adjustment cost and perform the posting.

**Title Block**
The equipment rental title block displays the system generated rental transaction ID and an optional description of the rental.

**Equipment Block**
The equipment block identifies the equipment being rented and the rate type being used (weekly, daily, hourly, etc...). This block also displays the rental rate for the rate type selected.

**Dates Block**
The dates block specifies the pickup date and time of the rental and the estimated and actual return date and times. The return dates affect whether the item profile status is available or rented.

**Status Block**
The status block displays the equipment rental status and the total cost of the rental. Equipment rental transaction must be approved before the cost is posted.

**Work Order Block**
The work order block specifies the work order and work order phase for which the equipment is being rented. Also recorded here is who released and returned the equipment.
Chapter 4  Part 2  Equipment Rental Adjustment Step-By-Step Quick Guide

This step-by-step quick guide is intended to help a user navigate successfully through completing and saving a record.

Creating an Equipment Rental Adjustment

1. Click The New Icon to create a new Equipment Rental Adjustment Record.
2. Search for the rental that needs to be changed.
3. Enter the data that needs to be changed.
4. Click on the Save icon to save all changes made on the rental record.
Chapter 5: Rental Request Manager  
Chapter 5 Part 1 Rental Request Manager Conceptual Guide

The Rental Request Manager takes all material requests that require equipment to be rented to a job and processes them in the Asset Management module equipment rental screens. Note that the material requests must be created as an equipment rental type of material request (this process is menu driven in the Work Management module) and must be in finalized status. The user performs a search to locate qualifying material requests.

Material Request Block
The material request block identifies the material request being processed. The associated work order and phase are also displayed for reference.

Rental Detail Block
The rental detail identifies the quantity requested and the pick-up and return times as specified on the material request.
**Equipment Block**
The equipment detail block identifies the individual equipment item being rented to satisfy the requirements in the material request. The user completing this screen selects the equipment being rented and the shop person to whom the item will be released.

**Chapter 5 Part 2 Rental Request Manager Step-By-Step Quick Guide**
This step-by-step quick guide is intended to help a user navigate successfully through completing and saving a record.

**Creating a Rental Request Manager**

1. Click on the search screen to create filter criteria in order to return a series of material requests.
2. Click on the transaction number at the bottom of the screen.
3. Click to select the equipment to be rented.
4. Click to select the shop person who will be picking up the rental.
5. Click on the green done flag to take the user back to the main rental page.
6. When the save icon has been clicked, the rental request becomes an equipment rental record. Now, follow steps from **Chapter 2 Part 2 Equipment Rental Step-By-Step Quick Guide**
Chapter 6: Equipment Meter

Chapter 6 Part 1 Equipment Meter Conceptual Guide

The Equipment Meter screen identifies the meter associated with an equipment item and supports the entry of meter readings for that metered equipment item.

Active Block
Active indicates whether or not the equipment meter is active and available for use in the system.

Equipment Block
The equipment block identifies the parent equipment record being read and equipment details used for management and reporting.

Meter Information Block
The meter information block contains critical information as it pertains to the meter and subsequent system behavior. The UOM is the UOM being counted on the meter when reading entries are added. The rollover point and rollover count are important to be able to maintain accurate deltas when the meter rolls over to start from zero again. The roll count maintains the number of times this meter has rolled over. Estimated units per day allow for forecasting when it comes to metered preventive maintenance schedules.
Meter Readings Block

Reader Block
The reader block on the meter reading identifies the reading date which becomes the record ID of the reading. The reader name is entered here also. The reader, or data entry administrator, may mark that the reading is "verified" or "verified" may be reserved for someone with supervisory responsibility to ensure accurate meter readings.

Reading Block
The reading block is where the actual meter reading is recorded. Prior reading is displayed and the meter reading change is calculated.

Chapter 6 Part 2 Equipment Meter Step-By-Step Quick Guide
This step-by-step quick guide is intended to help a user navigate successfully through completing and saving a record.

Creating an Equipment Meter and Reading

1. Click the New icon to create a new meter reading.
2. Click in the Meter field to add the name of the meter.
3. Type in a description to help identify the type of meter.
4. Click to select the UOM for the meter.
5. Type in the rollover point.
6. Type in the estimated units per day.
7. Click to save the meter record.

Optional: Select a piece of Equipment
1. Click to select the piece of equipment that is associated with the meter.

Optional: Add a Meter Reading
2. Click on the green plus in the lower right had corner of the record.
3. Click to select the meter reading date.
4. Click to select the person who conducted the reading.
5. Type in the meter reading.
6. Click on the green flag. Click the save icon to save the reading.
Chapter 7: Asset Meter

Chapter 7 Part 1 Asset Meter Conceptual Guide

The Asset Meter screen identifies the meter associated with an asset and supports the entry of meter readings for the metered asset.

Active Block
Active indicates whether or not the asset meter is active and available for use in the system.

Asset Block
The asset block identifies the parent asset to which the meter belongs.

Meter Information Block
The meter information block contains critical information as it pertains to the meter and subsequent system behavior. The UOM is the UOM being counted on the meter when reading entries are added. The rollover point and rollover count are important to be able to maintain accurate deltas when the meter rolls over to start from zero again. The roll count maintains the number of times this meter has rolled over. Estimated units per day allow for forecasting when it comes to metered preventive maintenance schedules.

Meter Readings Detail
The asset meter readings detail screen is where individual asset meter reading events are recorded. The PM generator may then use the interval of these readings to generate future PM work orders.
**Reader Block**
The meter block identifies the reading date which becomes the record ID of the reading. The reader name is entered here also. Typically the verified flag is reserved for someone with supervisory responsibility to ensure accurate meter readings.

**Reading Block**
The reading block is where the actual meter reading is recorded. The prior reading is displayed and the meter reading change is calculated.

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**Chapter 7  Part 2 Asset Meter Step-By-Step Quick Guide**
This step-by-step quick guide is intended to help a user navigate successfully through completing and saving a record.

**Creating an Asset Meter**
1. Click the New icon to create a new meter.
2. Click in the Meter field to add the name of the meter.
3. Type in a description to help identify the type of meter.
4. Click to select the UOM for the meter.
5. Type in the rollover point.
6. Type in the estimated units per day.
7. Click to save the asset meter record.

**Optional: Select an Asset**
1. Click to select the asset group that would go with the meter.
2. Click to select the asset that would go with the meter.

**Optional: Add a Meter Reading**
1. Click on the green plus in the lower right hand corner of the record.
2. Click to select the meter reading date.
3. Click to select the person who conducted the reading.
4. Type in the meter reading.
5. Click on the green flag.
6. When the user clicks on the save icon the meter reading posts to the piece of equipment assigned to the meter.
Chapter 8: Master Asset Profile
Chapter 8 Part 1 Master Asset Profile Conceptual Guide

The Master Asset Profile defines an asset including where the asset is located, its disposition, maintenance responsibilities, and general condition. Property asset type assets automatically inherit children associated to the specified property.

Location Block
The location block defines the location of the assets within the property hierarchy. An asset could also be located in a warehouse/bin.

Manufacturer Block
The manufacturer block provides an area to record manufacturer, the part/model number, and a serial number for the asset. This block is also used to link an asset profile to an inventory part profile.

Picture Block
The picture block supports an image of the asset to assist with identification and familiarization. Images must first be defined in the document repository and are then available for selection in the picture block.

Preventive Maintenance Block
The preventive maintenance block is used to specify if the asset is on a preventive maintenance route and sequence on the route. It is specified here if the asset requires a lock out / tag out procedure when performing maintenance.

Status Block
The status block identifies whether or not the master asset profile is active and other asset related conditions. The asset type field identifies the kind of asset which drives how the system utilizes this asset. Master Asset Profiles may be defined as Follows:
• **Property and property components.** The property asset type can only be defined once per property code. This defines the asset representation of the property and will automatically inherit the children assets that reside in that property. Property components are a subset of a property asset. Examples of property components are roofs, floors, and elevators.

• **System asset type contains component assets which may be either another system or a serialized asset.** Example systems may include a computer network, a security system, fire control system, and even plumbing or electrical systems.

• **Durable goods** asset type utilizes component assets to define the exact items and item count that represent the durable good. Examples include tables, chairs, and desks.

The Asset Group, a collection of like assets, is utilized to define attribute values for the asset and easily filter like assets. Asset groups are associated with asset types in the asset group setup menu screen. Replacement tags are identity labels supporting the cross-referencing of new assets. This label can be changed and maintained in history, the asset ID itself cannot be changed.

**Master Asset Profile View/ Select: Extra Description**
The extra description block provides an additional 4000 characters to further describe the parent record. This information is included in the parent record's search screen and is ideal if the basic 255 character description is insufficient.

**Master Asset Profile View/ Select: Reference Data**
The reference data screen displays additional, relevant information regarding an asset profile. This information can be used to help manage the asset profile or for reporting and/or analysis.

**Contractor Block**
The contractor block identifies the contractor and service contract established to service or manage this asset. Depending upon the preventive maintenance setup, this contractor could be used to default assignment to a PM work order.

**Geocoding Block**
The geocoding block includes latitude, longitude, and altitude values. These values are used for general reference, reporting, or for inclusion in a geographical information system (GIS). This information interfaces with the GIS module.

**Quantity Block**
The quantity block identifies the count and unit of measure of the asset profile should there be more than one quantity necessary to define the overall asset.

**Shop Block**
The shop block identifies the shop and shop person with oversight responsibility for the asset profile. Depending upon the preventive maintenance setup, this shop could be used to default assignment to a PM work order.
**Master Asset Profile View/Select: Attributes**
The attribute screen contains asset specific values for each attribute. Available attributes are defined by the asset group.

**Attributes Block**
The values define here are the asset's specific data for the attributes defined by the asset group.

**Master Asset Profile View/Select: Account Setup**
Account setup screen associates an item to a charge account. These accounts collect charges from work order phases when the asset is associated to the phase and the asset funding source is selected.

**Account Block**
A charge and offset account can be defined in this block and paired with a subcode (account extension) to specify the account/subcode combination for financial transactions.

**Dates Block**
The dates block specifies the active period of the shop account and when charges may be placed against the active account. When an expiration date is specified, the account is set to expire on that date and is no longer active. Both the start date and expiration date are optional.

**Subledger Block**
The subledger fields are used to specify the type of costs charged to the account/subcode combination. The subledger options available are labor, material, contract, equipment, or all. By default, the subledger is set to all which allows labor, material, contract, and equipment charges to the account/subcode combination. Also, the percentage of costs can be specified to charge to the account/subcode/subledger combination.

**Master Asset Profile View/Select: Relocation**
The relocation screen shows the history of an asset item location. Items are assigned new property-location values through the relocation screen. This action builds a historical trail of where the asset has been in use.

**Date Block**
The relocation date block identifies the (required) date of the relocation and the user login (editor) creating the relocation record. This date builds the relocation record trail. Relocation records may not be edited in order to maintain the integrity of when and where items are in use.

**Location Block**
The location block identifies the new location of the asset item being relocated. It may be located in a property, a property location, or warehouse/bin.

**Master Asset Profile View/Select: Warranty**
The warranty view screen identifies reference details regarding an equipment warranty. This warranty will appear on the work order phase as an alert if active.

**Contractor Block**
The contractor block identifies the contractor and the contractor address code for the contractor responsible for providing warranty services or repairs the asset.

**Dates Block**
The dates block specifies the active period of the warranty for the asset/equipment for which the identified contractor is responsible to provide services or repairs specified in the terms. Both the start date and expiration date are optional. When an expiration date is specified, the expired warranty is then no longer active.
**Master Asset Profile View/ Select: Parts List**
The parts list is helpful to track the actual inventory parts needed to keep the asset maintained. Specific counts and sizes may be identified here.

**Parts Block**
The part block identifies an inventory part that is associated with the asset. When the part is selected the class, commodity, and inventory item classification are also displayed.

**Quantity Block**
The quantity block displays the unit of measure and the quantity for the master asset.

**Master Asset Profile View/ Select: Active PM Templates**
The active PM template screen displays the active preventive maintenance templates for which this asset is included. To modify this screen, modify a PM template by either adding or removing the asset.

**Master Asset Profile View/ Select: Meters**
The master asset profile meters view screen identifies meters associated this asset and details regarding those meters including reading dates and last reading.

**Master Asset Profile View/ Select: Support Locations**
Support locations are places served by an asset. For instance, if a particular large air handler provides air handling to several floors in a building, the rooms on those floors are the air handler's supported locations.

**Locations Block**
The location block is used to specify a location within the property hierarchy that is serviced or supported by the asset.

**Usage Factor Block**
The usage factor block identifies the percent of time or capacity of an asset that a location utilizes. For example if an air handler supports four locations that are the same size, then the usage factor entered for each room would be 25 percent.

**Master Asset Profile View/ Select: Condition Assessment**
The condition assessment view screen contains details related to the capital planning and assessment of an asset. This information is only applicable to assets associated on planned improvement transactions.

**Condition Index Block**
The condition index block specifies the asset information related to capital planning and assessment including purchase, replacement, useful life, costs, and values needed to calculate a condition index. The condition index being displayed is the “current” condition as it relates to the current inflated replacement value and current planned improvements inflated to current dollars.

**Master Asset Profile View/ Select: Risk Management**
The master asset profile risk management view represents the risk perspective on an individual asset item - defining the asset relative to insurance, appraisal, and risk analysis.

**Appraisal Date Block**
The appraisal date block identifies the last date of an insurance appraisal, the name of the appraiser, and the appraised actual cash value of the asset for the purposes of insurance. The actual cash value is the
value of an asset if sold under general market conditions (not under duress) and factoring in the asset's actual condition.

**Insurance Category Block**

Insurance category details associate asset groups with particular types of insurance coverage. Insurance category identifies which classification will include this asset's costs for insurance coverage totals. Replacement cost identifies the cost of a new replacement. Exclusion amount represents the amount of the cost that is excluded from insurance coverage. This amount is generally determined by the insurance provider and policy. Statement of value itemizes the amount that was last reported to the insurance provider.

**Master Asset Profile View/Select: Financial Information**

The financial information screen contains depreciation specific used to manage an asset profile.

**Asset Class Block**

Asset class is a category of assets that share financial characteristics such as type, useful life, and method(s) for depreciation. Asset classes are linked to asset groups (non-financial) for capitalization and depreciation of the asset group. Start date is used where an asset has a fixed starting point for depreciation other than purchase date (for example, accumulated depreciation carried over from another system). If start date is used, depreciation schedules are created using start date and prior depreciation as starting points. If start date is empty, depreciation schedules are created with purchase date and purchase cost as starting points. If start date is entered, all transactions for the asset must occur after the start date.

**Depreciation Information Block**

The depreciation information block identifies various values, such as Purchase Date and Cost, as well as other values important to asset valuation and depreciation. These values may be entered when the asset is first being entered but cannot be modified after initial creation while the asset is in an active status.

**Depreciation Book Detail**

The depreciation book detail identifies the depreciation book(s) associated with the asset. The depreciation book defines the default factors (method, convention) used to depreciate an asset's cost over its useful life. Each book displays a monthly depreciation schedule for the asset. Financial reports are generated based on the depreciation book information.

**Master Asset Profile View/Select: Replacement Tag History**

The replacement tag history is a view-only display of changes to an asset identity label or barcode tag in the event it has been updated or replaced.

**Master Asset Profile View/Select: Asset Disposal History**

The Asset Disposal History is a view-only display of an asset that has a status set to Disposal. History also shows disposal date, method and other details.

**Master Asset Profile View/Select: Notes Log**

The Notes Log supports the management of additional notes for a specific record. This is a great way to keep a dated running commentary on a specific record in the system.

**Notes Log Entry Block:** This allows the author to enter up to 2000 characters of free-form text in each log created. The logs may be further classified by selecting a note type. The entry date and login are automatically defaulted and associated to the note and may not be modified after the note is saved.
Work Desk Block: The notes log WorkDesk block identifies whether or not the notes log(s) will be available in the WorkDesk notes log content channel. Additionally, these notes may be filtered according to a unique note type to avoid extraneous notes from appearing on the WorkDesk.

AiM provides a search and navigation bar to enter criteria for the quick retrieval of notes over time.

Master Asset Profile View/ Select: Status History
Status history provides a view-only record of statuses over time. Status history is automatically updated as statuses change and cannot directly be edited within the status history screen. The status editor and date are included as a part of this history.

Master Asset Profile View/ Select: User Defined Fields
User defined fields (UDFs) provide the ability to create fields for data entry not provided in the baseline system. UDFs must be built in the system administration module for the module screen where the UDF will be employed. The UDF can be linked to a validation table so the user selects values from a pre-defined list. The UDF may even be marked as required to complete a record. User defined fields create additional customized reporting and management capabilities.

Master Asset Profile Component
The component asset screen associates one asset to another in a parent-child relationship. For a property type asset, the component asset screen displays child assets automatically. Components for other asset types can be manually linked.

Asset Block
The asset block is used to specify an asset as a component or child of the parent asset. A component asset must be an asset defined in the system and be one of the following asset types: property component, system, or serialized.

Location Block
The location block identifies the location information for the component asset.

Manufacture Block
The manufacturer block displays the manufacturer, the manufacturer part/model number, and a serial number for the component asset. Also, this block displays the inventory part profile that the component asset is associated with.

Preventive Maintenance Block
The preventative maintenance block displays if the component asset is on a preventive maintenance route and sequence on the route. Also displayed here is whether the component asset requires a lock out / tag out procedure when performing maintenance.

Quantity Block
The quantity block displays the unit of measure and the quantity for a component asset. This is especially useful for durable assets.
Chapter 8 Part 2 Master Asset Profile Step-By-Step Quick Guide

This step-by-step quick guide is intended to help a user navigate successfully through completing and saving a record.

Creating a Master Asset Profile

1. Click the New icon to enter a new asset profile.
2. Click in the description block to enter a required description for the master asset.
3. Click to enter the status of the asset.
4. If the asset needs a lockout/tagout procedure, set the flag to Yes. If not, leave the default setting to No.
5. Click to select the asset type. When the user selects the asset type, it will default the asset group and update the status of the asset.
6. Click on the save record Icon.

Optional: Select a Location

1. Enter the location of the asset either in a property or warehouse. (Note: If the user selects the asset type of Property, location will become required.)

Optional: Preventive Maintenance

1. Click to select the PM route for the asset.
2. Enter in the route sequence.

Optional: Manufacturer

1. Click to select the manufacturer of the asset.
2. Type in a model number for the asset.
3. Type in a serial number for the asset.

Optional: Component Asset

1. Click on the green plus icon.
2. Click to select the asset.
3. If building a system or property component, click on the green plus to add one or more assets to the record.
Appendix 1: Asset Management Module Setup Guide

1. Equipment Group

An equipment group is a collection of equipment with common attributes. Equipment Group filters all equipment into manageable subsets.

Active Block

The active block defines whether or not the group is active and available for use in the system.

Attributes Block

An attribute is a characteristic unique to an equipment group and used for reporting and management. The equipment group to which the item belongs determines which attributes are available for data entry in the item record.

Attributes Definition Block

In this block the following details are defined for an attribute:
- Label - This is the label or name displayed for an attribute sequence. Enter a sequence number to specify the ordering of an attribute in the list of attributes.
- Required - This is a yes/no field which is a system flag for whether or not a value for the attribute is required. If required, a new asset record cannot be saved without data populated in this field.
- Field type - The field type selected can be one of three types: 1) string - numbers and or characters can be entered for the attribute value; 2) number - only numbers can be entered for an attribute value; and, 3) date - the value field for the attribute is a date format.
- Field length - This is the number of characters or numerals that can entered into the attribute value field.
- Decimal precision - This is the number of decimal places the attributes value will record if the field type selected is a number.
- Initial value - Enter the initial value to default in for the attribute value.

Equipment Group View/ Select: Rental Rates

Rental rates are the default rates associated with an equipment group. When an item is rented, its rental rates are determined by the parent equipment group. An optional start and end date may be specified to indicate a specific time period in which to charge a certain rental rate.
Equipment Group View/Select: Parts List
The part list identifies the individual parts that typically associated with the equipment group and/or the list of parts required to be maintained in inventory for the equipment group. The parts definition includes characteristics of the individual part.

Equipment Group View/Select: Extra Description
The extra description block provides an additional 4000 characters to further describe the parent record. This information is included in the parent record's search screen and is ideal if the basic 255 character description is insufficient.

Equipment Group View/Select: Related Documents
The related documents function allows the user to attach any electronic record, such as a document, spreadsheet, or image from the document repository to the record. Related documents can also be a URL (web) shortcut.

2. Equipment Status
The equipment status setup screen establishes the stage in the lifecycle of a piece of equipment. This userspecified status name, associated with a system status flag, determines status functionality within the system.

Active Block
The active block determines whether or not a status value is available for use with the system. No indicates the status is not available for use in the system. Yes indicates the status is available for use, and that this status is part of the business process. The sequence number identifies a numerical sort order for this status when appearing in a zoom list of all statuses. Each user specified status is associated to one of the four system status flag values that control the behavior of the status within the system:
- **Available** indicates the equipment is in a warehouse bin location and, if selected, may be rented.
- **Inactive** equipment may not be rented or otherwise utilized.
- **Installed** equipment is active and eligible to appear on a work order phase or eligible for preventive maintenance.
- **Rented** equipment is active and currently being rented out.
Workflow Block

Workflow is an optional group of fields that can be populated to enforce a specific workflow. The workflow is enforced using the defined range of statuses within which a status can be set. The minimum status is the least available status that can be set from the current status. The maximum status is the greatest available status that can be set from the current status. Without the use of minimum and maximum statuses, any status may be changed to any other status. The system will analyze the current status against any new status the user is attempting to set. If the new status is within the min/max range of the current status, the user will be able to set the new status. This is a very effective means of forcing a particular set of steps within a process.

Days past due is a reporting function, used to identify the maximum number of days a record can remain at the current status before it would show up on a “Past Due” report.

Optional Roles

The status role block identifies which user role has permission and access to this status. When specified, only the users in the roles identified will have access to this status. If no roles are identified, then all users may have access to the status.

3. Asset Group

An asset group is a grouping of assets with common attributes. Asset group is classified according to an asset type which governs how an asset gets utilized in the system. Asset group is helpful for filtering all the assets down to a manageable subset.

Title Block

The asset group title block identifies the unique asset group ID and an optional description.

Active Block

The active block is used to define whether or not the group is active and able to be utilized in the system. The asset type for an asset group is selected in this block which governs how this asset gets utilized in the system. It is also a common reporting element. The exclusion percent is utilized when the risk
management module is purchased and defines the amount that is excluded from insurance coverage. For instance, where an insurance policy does not cover collectible art, a user would enter 100% as the default exclusion, for instance, of the asset group "Art Collection". The exclusion amount for the individual asset profile would show the full value of the asset in the exclusion amount. A $100 painting would have an exclusion amount of $100 (100%), and the difference $0 would be included in the insurance reports. Other typical exclusion examples are that insurance does not typically cover underground assets (piping, e.g.), and also excludes 80% of swimming pools.

**Attributes Block**

In this block the following details are defined for an attribute:
- **Label** - This is the label or name displayed for an attribute sequence. Enter a sequence number to specify the ordering of an attribute in the list of attributes.
- **Required** - This is a yes/no field which is a system flag for whether or not a value for the attribute is required. If required, a new asset record cannot be saved without data populated in this field.
- **Field type** - The field type selected can be one of three types: 1) string - numbers and or characters can be entered for the attribute value; 2) number - only numbers can be entered for an attribute value; and, 3) date - the value field for the attribute is a date format.
- **Field length** - This is the number of characters or numerals that can entered into the attribute value field.
- **Decimal precision** - This is the number of decimal places the attributes value will record if the field type selected is a number.
- **Initial value** - Enter the initial value to default in for the attribute value.

**Validation Block**

The validation values are pre-defined choices available for use on the attribute. Similar to a zoom field, validation values limit the entry of the field to the values in the list.

**Asset Group View / Select: Extra Description**

The extra description block provides an additional 4000 characters to further describe the parent record. This information is included in the parent record's search screen and is ideal if the basic 255 character description is insufficient.

**Asset Group View / Select: Related Documents**

The related documents function allows the user to attach any electronic record, such as a document, spreadsheet, or image from the document repository, to the record. Related documents can also be a URL (web) shortcut.

**4. Rental Rate Type**

Equipment rental rate type defines rental rates based upon a frequency of occurrences per a year. Rental rate types (assigned at the equipment group) are used for renting out equipment.
5. Asset Status

The asset status setup screen establishes the stage of an asset. This user specified status name, associated with a system status flag, determines status functionality within the system.

**Active Block**

The active block is used to determine whether or not a status value is available for use within the system. No indicates the status is not available for use in the system. Yes indicates the status is available for use, and that this status is part of the business process. The sequence number identifies the sort order for this status within the overall list of a status zoom window. The sequence number uses a numerical value to determine the ascending sort order. Each user specified status is associated to one of the five system status flag values that control the behavior of the status within the system. These are:

- **Pending** indicates a new asset has been created but is not yet available for use with transactions. This could be assets that are to be purchased and have yet to be installed or assets that are included in planning but may never be acquired. All fields are editable while in this status and no relocation histories or other audit trails will be started until the status is moved to an active status. These assets may also not be used on work orders or other transaction screens.

- **Active** identifies the asset as one that could be used on work orders or for other transactions, depending upon its asset type. Moving an asset to an active status locks several fields from entry: asset type, asset group, asset class, location and purchase date, useful life, purchase cost, salvage value, department, and fund.

- **Inactive** permanently retires an asset and removes it from use within the system. All histories will be maintained for reporting purposes.

- **Maintenance** is used to indicate that an asset is currently in service and is useful in determining MTBF (mean-time-between-failure) reports.

- **Disposed** is only used on a financial asset to indicate a financial disposal for depreciation purposes. The business logic is similar to an inactive status but the setting of the status is automatic within the system. When an asset is 100% disposed using the asset disposal screen, the asset record is automatically changed to Disposed.

**Asset Type Block**

Asset type is selected in this block to be associated with an asset status. The combination of asset status by asset type assists in managing and reporting on assets and equipment.
**Workflow Block**

Workflow is an optional group of fields that can be populated to enforce a specific workflow. The workflow is enforced using the defined range of statuses within which a status can be set. The minimum status is the least available status that can be set from the current status. The maximum status is the greatest available status that can be set from the current status. Without the use of minimum and maximum statuses, any status may be changed to any other status. The system will analyze the current status against any new status the user is attempting to set. If the new status is within the min/max range of the current status, the user will be able to set the new status. This is a very effective means of forcing a particular set of steps within a process.

Days past due is a reporting function, used to identify the maximum number of days a record can remain at the current status before it would show up on a “Past Due” report.
6. **Asset Type**

Asset types are user specified and associated to hard coded Asset Type Flags in the system. The asset type is associated with an asset status in the asset status setup screen. The combination of asset status by asset type assists in managing and reporting on assets and equipment.

<table>
<thead>
<tr>
<th>Asset Type</th>
<th>Description</th>
<th>Active</th>
<th>Asset Type Flag</th>
</tr>
</thead>
<tbody>
<tr>
<td>DURABLE</td>
<td>DURABLE</td>
<td>Yes</td>
<td>Durable Goods</td>
</tr>
<tr>
<td>PROPERTY</td>
<td>PROPERTY</td>
<td>Yes</td>
<td>Property</td>
</tr>
<tr>
<td>PROPERTY COMPONENT</td>
<td>PROPERTY COMPONENT</td>
<td>Yes</td>
<td>Property Components</td>
</tr>
<tr>
<td>SERIALIZED</td>
<td>SERIALIZED</td>
<td>Yes</td>
<td>Serializable</td>
</tr>
<tr>
<td>SYSTEM</td>
<td>SYSTEM</td>
<td>Yes</td>
<td>System</td>
</tr>
</tbody>
</table>

7. **Manufacturer**

The manufacturer screen is used to enter the different manufacturers of assets, equipment and/or materials.

<table>
<thead>
<tr>
<th>Manufacturer</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GE</td>
<td>GENERAL ELECTRIC</td>
</tr>
</tbody>
</table>

**Contact Information Block**

The contact information block is used to define address, phone, and contact names for the related manufacturer.