



AssetPlanner™

Project Planner Quick Start

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Creating Projects: Relating Actions to Projects

To create a project we begin in the Asset Planning module as this allows us to link our project to action items within our capital planning dataset. Once linked the action will update automatically upon project completion.

Step 1: Find the **Asset** where the completed work was performed and click on **Elements**.

>>Step 4: Click on **Relate Project**

Step 2: Select the row containing the **Element** & related **Action** you would like to complete.

Step 3: Review the **Action** information to ensure that the **Action Cost** and the **Action Year** are correct.

Category	Element Number	Replacement Cost	Last Major Action	Element Description	Commentary	Overall Condition	Action Summary	Action Details	Action Type	Cost	Year	Repeat Interval	Projects
A10 - Foundations	1	12,474	1985	Concrete slab with crawl space.	No issues reported or observed regarding the foundations.	Good							
B10 - Superstructure	1	20,790	1985	Wood framed one-storey structure.	No structural cracking observed or issues noted.	Good							
B2010 - Exterior Walls	1	8,316	1985	Painted wood board vertical siding.	In good condition with minor scratches and wear.	Fair	Replace wood board siding.		Replacement	7,666	2019	75	663,001
B2010 - Exterior Walls	1	8,316	1985	Painted wood board vertical siding.	In good condition with minor scratches and wear.	Fair	Re-paint wood siding.		Repair	2,555	2017	38	539,001
				al frame double pane windows.	Insulated glazing units dated 1985. Some condensation observed on the inside of window	Poor	Replace windows.		Replacement	7,155	2017	32	237,001
				g wood frame, metal pre-finished, recessed panel swing doors.	Exterior doors were in good condition at the time of inspection.	Good	Replace exterior doors.		Replacement	1,247	2022	27	
B30 - Roofing	1	42,745	1985	Asphalt shingle roofing on sloped wood frame vaulted roof.	Reported leaks and damage observed.	Poor	Replace roofing.	Roof has had several leaks, planned to be replaced by "ABC"	Replacement	42,745	2017	22	720,001
C1010 - Partitions	1	5,198	1985	Wood framed drywall partitions.	Drywall was observed to be in good condition with no cracks, dents or major scratches.	Good							
C1020 - Fittings	1	2,599	1985	Wood frame deck with painted wood picket railings. Wood frame sliding gates. Rubber mats for traction assistance.	In fair condition, showing signs of wear.	Fair	Replace fittings.		Replacement	2,599	2022	22	
C1020 - Fittings	1	2,599	1985	Wood frame deck with painted wood picket railings. Wood frame sliding gates. Rubber mats for traction assistance.	In fair condition, showing signs of wear.	Fair	Re-paint wood components.		Repair	780	2017	0	
C1030 - Interior Doors	1	3,118	1985	Metal frame, painted solid core flat panel swing doors. One pair and 2 singles.	Interior doors were in good condition. No scratches or damage was observed.	Good	Replace interior doors.		Replacement	2,599	2022	25	

Creating Projects: Relating Actions to Projects

When you click the Relate Project button a pop-up menu will appear with a number of options. You can create a link to a new project or relate it to an existing project by using the search function.

Step 1: Specify how you would like to relate the action to a project:

Create one new project for each selected action:
Individual projects will be created for each selected action.

Works best when you want to track each action separately as a project.

Create one new project for all selected actions:
One single project will be created for all selected actions.

Works best when you want to track a group of actions in a single project.

Relate all selected actions to an existing project:
this option will relate all selected actions to a project that is already created.

Use the search function to find the existing project you would like to relate.

Search for Project to Relate

Specify how-to relate selected action(s) to project.

Create one new project for each selected individual action
 Create one new project for all selected actions
 Relate all selected actions to an existing project (Select project below)

Search criteria

Project No.: Asset: Atherton Center
Fiscal Year: 2017 Assigned To:
Summary: Provider:

Search

Search Results. Double click or Select or press Select button.

Project No.	Fiscal Year	Status	Asset	Summary
720.001	2017	Pending	Atherton Center	Replace roofing.
562.001	2017	Pending	Atherton Center	Re-paint ceiling wood boards.
551.001	2017	Pending	Atherton Center	Re-paint doors and frames.
539.001	2017	Pending	Atherton Center	Re-paint wood siding.

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2,599 1985 Wood frame deck with painted wood picket railings. Wood frame In fair condition, showing signs of Fair Re-paint wood components.

Relate Cancel

Step 2: Click on **Relate**. Once a project is related to an action a project number will be created as a link under the "Projects" column at the action level.

Creating Projects: Not Linked to Actions

In the Project Planning module you can create projects that are not linked to an action. Once the Project is created you will still have the ability to link to an action(s) at a later point using the Related Actions tab.

Step 1: Select the Project Planning icon from the modules listing.

Step 2: From the Projects menu click on Add Project. This will take you to the Project form where you will be asked to provide some basic project details.

Budget Num...	WorkOrder	Category Name	Summary	Priority	Status	Type	Date Completed	FiscalYear	Portfolio
829	726.001	D2030 - Sanitary Waste	Replace sanitary piping.	Medium	Pending			2017	Parks
828	725.001	C1010 - Partitions	Replace toilet stall partitions.	Low	Pending	Lifecycle Replacement		2017	Community Recreation Service
826	723.001	C1020 - Fittings	Replace block storage bins.	Medium	Pending			2035	Community Recreation Service
827	724.001	C1020 - Fittings	Replace benches.	Medium	Pending			2022	Community Recreation Service
825	722.001	C1030 - Interior Doors	Replace door at office washroom.	Medium	Pending			2019	Community Recreation Service
824	721.001	B2020 - Exterior Windows	Replace metal ticket taking service counter	Low	Pending			2037	Community Recreation Service
823	720.001	B30 - Roofing	Replace roofing.	Low	Pending	Lifecycle Replacement		2017	Community Recreation Service
822	719.001		project	Low	Pending	Lifecycle Replacement		2017	Parks
821	718.001	B2020 - Exterior Windows	Replace windows with double glaze thermally broken ...	High	Pending			2021	Library
820	717.001		Interior renovations of Firehall 12 (including walls, floo...	Low	Pending	Lifecycle Replacement		2016	Emergency Services
819	716.001	B20 - Exterior Enclosures	Replace exterior windows and doors.	Medium	Pending	Lifecycle Replacement		2021	Emergency Services
818	715.001	C3010 - Wall Finishes	Interior Renovation of all rooms (walls, floors, ceilings).	Low	Scheduled	Lifecycle Replacement		2016	Emergency Services
817	714.001	C3010 - Wall Finishes	Replacement	Low	Pending			2017	Community Recreation Service
816	713.001	B2030 - Exterior Doors	Replace existing doors & door jambs.	High	Pending			2016	Library
815	712.001	B2020 - Exterior Windows	Replace metal ticket taking service counter	Low	Completed	Lifecycle Replacement	2016-10-14	2022	Community Recreation Service
814	711.001	B30 - Roofing	Replace fasteners securing sheet metal roof panels.	High	Pending	Repair (extend Life of Asset)		2016	Community Recreation Service
813	710.001	14650-03	Lifecycle Replacement	High	Pending	Lifecycle Replacement		2016	Community Recreation Service
812	709.001	D2095 - Domestic Water H...	Replace domestic hot water heater.	High	Pending			2016	Municipal Services
811	708.001	B2010 - Exterior Walls	Action cost provided for envelope review.	High	Pending			2016	Library
810	707.001	B2010 - Exterior Walls	Replace existing stucco wall.	High	Pending			2016	Library
809	706.001	C1010 - Partitions	Replace partition walls	Low	Pending			2040	Parks
788	16.003	B05-183495320	D3033 - Condensing Units	HVAC and Dehumidification Upgrade - Project # 25543 ...	Pending	Lifecycle Replacement		2064	Community Recreation Service
789	15.003	B05-183496576	D3031 - Chillers	HVAC and Dehumidification Upgrade - Project # 25543 ...	Pending	Lifecycle Replacement		2064	Community Recreation Service
790	8.003	B05-183512904	B2020 - Exterior Windows	Replace Skylights and windows, Fraser glass, asbest...	Pending	Lifecycle Replacement		2054	Emergency Services

Navigation

Project Planner Home Page

The Project Planner home page displays Project summary charts across the top and a listing of Projects below. Similar to the Asset Planning home page you can use the asset tree to the left to filter down the charts & project listing to a specific asset or group of assets.

The Projects menu allows you to search, filter and create projects.

The filter drop down provides some quick filtering options. Use the filter button to the right to create a custom filter.

Once the list is filtered and customized you can export directly to excel

Columns within the grid can be turned on or off to display any available project or asset details.

You can change Project assignment or modify values for multiple projects. First select the Projects in the list and then select **Assign** or **Modify Selected**.

>>Click on a Project # to view the Project Form

Project #	Category Name	Asset	Summary	Priority	Status	Type	Fiscal Year	Estimated Cost	Actual Cost	Department	Current Risk Rating
265 001	D2095 - Domestic Water H...	Atherton Center	Replace domestic hot water heater.	Low	Pending	Lifecycle Replacement	2016			Community Centers	
276 001	D5022 - Lighting Equipment	Atherton Center	Replace lighting fixtures.	Low	Pending	Lifecycle Replacement	2016			Community Centers	
280 001	D5037 - Fire Alarm System	Atherton Center	Replace fire alarm devices.	Medium	Work in Progress	Lifecycle Replacement	2016			Community Centers	
539 001	B2010 - Exterior Walls	Atherton Center	Re-paint wood siding.	Low	Pending	Lifecycle Replacement	2017			Community Centers	
551 001	C1030 - Interior Doors	Atherton Center	Re-paint doors and frames.	Low	Pending	Betterment	2017			Community Centers	
562 001	C3030 - Ceiling Finishes	Atherton Center	Re-paint ceiling wood boards.	Low	Pending	Betterment	2017			Community Centers	
663 001	B2010 - Exterior Walls	Atherton Center	Replace wood board siding.	Low	Pending	Lifecycle Replacement	2020	\$511		Community Centers	
720 001	B30 - Roofing	Atherton Center				Lifecycle Replacement	2017	\$7,666		Community Centers	
366 001	A10 - Foundations	Belhaven Library				Lifecycle Replacement	2017	\$42,745		Community Centers	
367 001	A10 - Foundations	Belhaven Library				Repair (extend Life of Asset)	2015	\$1,533		Library	
381 001	C1020 - Fillings	Belhaven Library				Studies and Audits	2016	\$5,111		Library	
383 001	C20 - Stairs	Belhaven Library				Betterment	2016	\$2,555		Library	
394 001	C3030 - Ceiling Finishes	Belhaven Library				Betterment	2016	\$5,111		Library	
398 001	D2010 - Plumbing Fixtures	Belhaven Library				Betterment	2016	\$2,351		Library	
400 001	D3034 - Packaged Air Con...	Belhaven Library	Replace air conditioner.	Medium	Work in Progress	Lifecycle Replacement	2016	\$2,044		Library	
402 001	D5091 - Exit & Emergency ...	Belhaven Library	Replace emergency lighting and exit signs.	High	Work in Progress	Lifecycle Replacement	2016	\$1,533		Library	
404 001	D5091 - Exit & Emergency ...	Belhaven Library	Replace exit light with LED.	High	Work in Progress	Lifecycle Replacement	2015	\$1,227		Library	
406 001	D5022 - Lighting Equipment	Belhaven Library	Replace lighting fixtures.	Medium	Work in Progress	Lifecycle Replacement	2015	\$204		Library	
713 001	B2030 - Exterior Doors	Belhaven Library	Replace existing doors & door jams.	High	Pending	Lifecycle Replacement	2016	\$5,111		Library	
718 001	B2020 - Exterior Windows	Belhaven Library	Replace existing windows with double glaze thermally broken ...	High	Pending	Lifecycle Replacement	2021	\$2,044		Library	
410 001	G2020 - Parking Lots	Belhaven Library - Site	Replace asphalt pavement at the parking lots.	High	Work in Progress	Lifecycle Replacement	2015	\$15,332		Library	
414 001	G2030 - Pedestrian Paving	Belhaven Library - Site	Replace existing pedestrian walkway.	Urgent	Work in Progress	Lifecycle Replacement	2015	\$20,443		Library	
16 001	D3090 - Other HVAC Syst...	Bountiful Springs Arena	Replace AHU-2.	Low	Pending	Lifecycle Replacement	2015	\$5,622		Library	
10 001	D3031 - Chillers	Bountiful Springs Arena	Replace brine pumps.	Low	Pending	Lifecycle Replacement	2016	\$34,957		Arenas	
						Lifecycle Replacement	2016	\$12,266		Arenas	
								\$42,745			

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Review & Modify

Reviewing & Modifying in the Project Form

The Project form displays all information related to a specific project. Once you have made changes click Save.

Tabs across the top contain information relating to the project.

Send by E-Mail will send a link to the project to any user or email specified.

Assign budgets to your project using the **Budget Allocation** tab. Build out your project estimated and actual costs using the **Cost Items** tab

Related Actions displays all linked Actions from the Asset Planning module. Additional actions can be linked here.

Status fields specify the current stage of the project, scheduling and who it is assigned to.

Classification fields specify the type of project and asset/category it belongs to.

The screenshot shows a web-based project management form for a project named 'Atherton Center'. The form is divided into several sections:

- Classification:** Fields include Project # (720.001), Asset (Atherton Center), Location, Project Type (Lifecycle Replacement), Funding Source, Priority (Low), Category (B30 - Roofing), Budget Number, Program #, Work Order, Estimated Cost (\$42,745.44), and Inflation Rate (0%).
- Status:** Fields include Status (Pending), Pending, Assigned Group, Assigned To, Service Provider, Projected Start Date (2017-01-01), Actual Start Date, Projected Completion Date, Date Completed, Allocated Budget (\$0.00), Actual Cost, Fiscal Year (2017), Current Risk Rating, and Client Project Life Cycle.
- Created/Modified:** Created on 2017-04-19 14:24 by Joseph Iusi; Last Modified on 2017-10-30 18:07 by Joseph Iusi.
- Summary:** A text area containing 'Replace roofing.'

Navigation and utility buttons at the top include Save, Back, Delete, New, Copy To New, Send by Email, Previous Occurrence, Next Occurrence, and Help. A tabbed interface at the top allows switching between General, Details, Attachments, Internal References, Notes (0), Triggers, Related Actions (0/1), Related Items (0), Budget Allocations (0), Tasks (0), Cost Items, and Activity.

Completing Projects

Completing Projects

Once a Project has been fully completed the next step is to review & update the information in the Project form (based on actuals) and then update the Status field to Completed.

Step 1: Find the **Asset** where the completed work was performed and click on **Projects**. Then click on the **Project** you would like to update.

>>Step 3: Set the Status to “Completed” and click “Save” to begin our next section.

The screenshot displays a project management application interface. On the left is a navigation tree under 'View:' with a dropdown menu set to 'Portfolio, Department, Site Name'. The tree shows a hierarchy: Portfolios > Community Recreation S > Arenas (9) > Community Centers (: > Atherton Center (2) > Atherton Center > Elements (31) > Projects (4) > Atherton Center. A blue line connects this path to the 'Atherton Center' asset field in the main form.

The main form has tabs for 'General', 'Details', 'Attachments', 'Internal References', 'Notes (0)', 'Triggers', 'Related Actions (0/1)', 'Related Items (0)', 'Budget Allocations (0)', and 'Tasks'. The 'General' tab is active, showing the following fields:

- Classification: Project #: 720.001
- Asset*: Atherton Center
- Asset: Find
- Location:
- Project Type*: [dropdown]
- Funding Source: [dropdown]
- Priority: Low
- Category: Select... B30 - Roofing
- Budget Number: [dropdown]
- Program #: [text]
- Work Order: [text]
- Estimated Cost*: \$42,745.44
- Inflation Rate (%)*: 0

On the right, the 'Status' section includes:

- Status*: Pending (dropdown menu is open showing options: Pending, Scheduled, Work in Progress, Completed, Denied, Cancelled)
- Pending: [text]
- Assigned Group: [text]
- Assigned To: [text]
- Service Provider: [text]
- Projected Start Date*: [calendar]
- Actual Start Date: [calendar]
- Projected Completion Date: [calendar]
- Date Completed: [calendar]
- Allocated Budget: \$0.00
- Actual Cost: [text]
- Fiscal Year: 2017
- Current Risk Rating: [dropdown]
- Project Life: [dropdown]

At the bottom, the 'Summary*' field contains the text 'Replace roofing.'

Two callout boxes provide instructions: a blue box on the left (Step 1) points to the navigation tree, and a green box on the right (Step 3) points to the 'Completed' option in the status dropdown.

Step 2: Review & Update all project fields & tabs in accordance with your organization's Project Planner guidelines & process. Ensure that the cost & year completed are correct & accurate.

Action Cycling Options

When you set the status to Completed in Project Planner and click Save you will be presented with a pop-up box with a few options. These options allow you to specify how you would like the software to create the next life cycle of the action. In most cases you will want to use the default selections which will use any modified values when creating the next action cycle.

The **Cycling Method** gives you the option to create the next action cycle based on the current Repeat Interval or to create the next cycle based on the default template value.

The **Cost Type** gives you the option to utilize the modified value for the next action cost or to use the value based on the template.

The screenshot shows a dialog box titled "Complete Action parameters" with a close button (X) in the top right corner. The dialog is divided into two main sections. The first section is titled "Specify cycling method" and contains two radio button options: "Cycle (will create next action occurrence if Repeat Interval > 0)" which is selected, and "Cycle based on template (will determine if next action occurrence is needed based on company setting and template configuration)". The second section is titled "Specify cost type to use for next action occurrence" and contains a sub-header "Specify what type of cost will be used for element replacement value and future action cost" followed by two radio button options: "User defined cost (where applicable)" which is selected, and "Default cost (Template model cost)". At the bottom of the dialog, there are three buttons: "Advanced Mode", "Submit", and "Close".

Advanced Mode allows you to make further modifications to the actions & next cycle. Useful if you forgot to change something in the previous steps.

>>To begin our next section click on the "Submit" button.

Final Steps

Once you have completed a Project the software will automatically archive the original action & project and it will generate a new replacement action based on the cycling method selected. Some final data management steps in Asset Planner are outlined below.

To view archived actions click on **Settings** and then click on **Show Completed Actions Only**.

Review & update the **Element Description & Commentary** if necessary (ex. If a new/different system was installed or if the previous commentary contained condition information clear it out).

You may want to update the **attachment** with a new **picture** or archive the old one. Alternatively you can leave the attachments as-is until the next assessment.

Category	Element Number	A...	Replacement Cost	Last Major Action	Element Description	Commentary	Overall Condition	Action Summary	Action Details	Action Type	Cost	Year	Repeat Interval
B30 - Roofing	1		42,745	2017	Asphalt shingle roofing on sloped wood frame vaulted roof.		Good	Replace roofing.		Replacement	42,745	2039	22
C1010 - Partitions	1		5,198	1985	Wood framed drywall partitions.		Good	Replace interior partitions.		Replacement	5,198	2060	75
					ame deck with painted ket railings. Wood frame ates. Rubber mats for assistance.	In fair condition, showing signs of wear.	Fair	Replace fittings.		Replacement	2,599	2022	22
					ame deck with painted ket railings. Wood frame ates. Rubber mats for assistance.	In fair condition, showing signs of wear.	Fair	Re-paint wood components.		Repair	780	2017	0
C1030 - Interior Doors	1		3,118	1985	Metal frame, painted solid core flat panel swing doors. One pair and 2 singles.	Interior doors were in good condition. No scratches or damage was observed.	Good	Replace interior doors.		Replacement	2,599	2022	25
C1030 - Interior Doors	1		3,118	1985	Metal frame, painted solid core flat panel swing doors. One pair and 2 singles.	Interior doors were in good condition. No scratches or damage was observed.	Good	Re-paint doors and frames.		Repair	256	2017	0
C1080 - Kitchen Fittings & Finishes	1		7,277	1985	Modular cabinetry with laminate countertops.	In good condition.	Good	Replace cabinets and countertops.		Replacement	7,277	2022	10
C1090 - Bathroom Fittings &	1		1,559	1985	Modular cabinetry with laminate countertops.	In good condition.	Good	Replace cabinets and countertops.		Replacement	780	2022	10