# AssetPlanner™
## Quick Start Guide

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# Getting Started:
## Web Link & Login

# Web Link & Login

## www.AssetPlanner.com

First enter your **e-mail address** and the **password** provided to you by Ameresco and then click **Login**.

Upon logging in for the first time you will be asked to create a **new password** for your account.

*Tip:* *If you ever forget your password you can click on the "I forgot my password" link. You will receive an e-mail with instructions on how to re-set your password.*

**>>To begin our training session click on Change Password and then you will be asked to Accept the terms and conditions.**
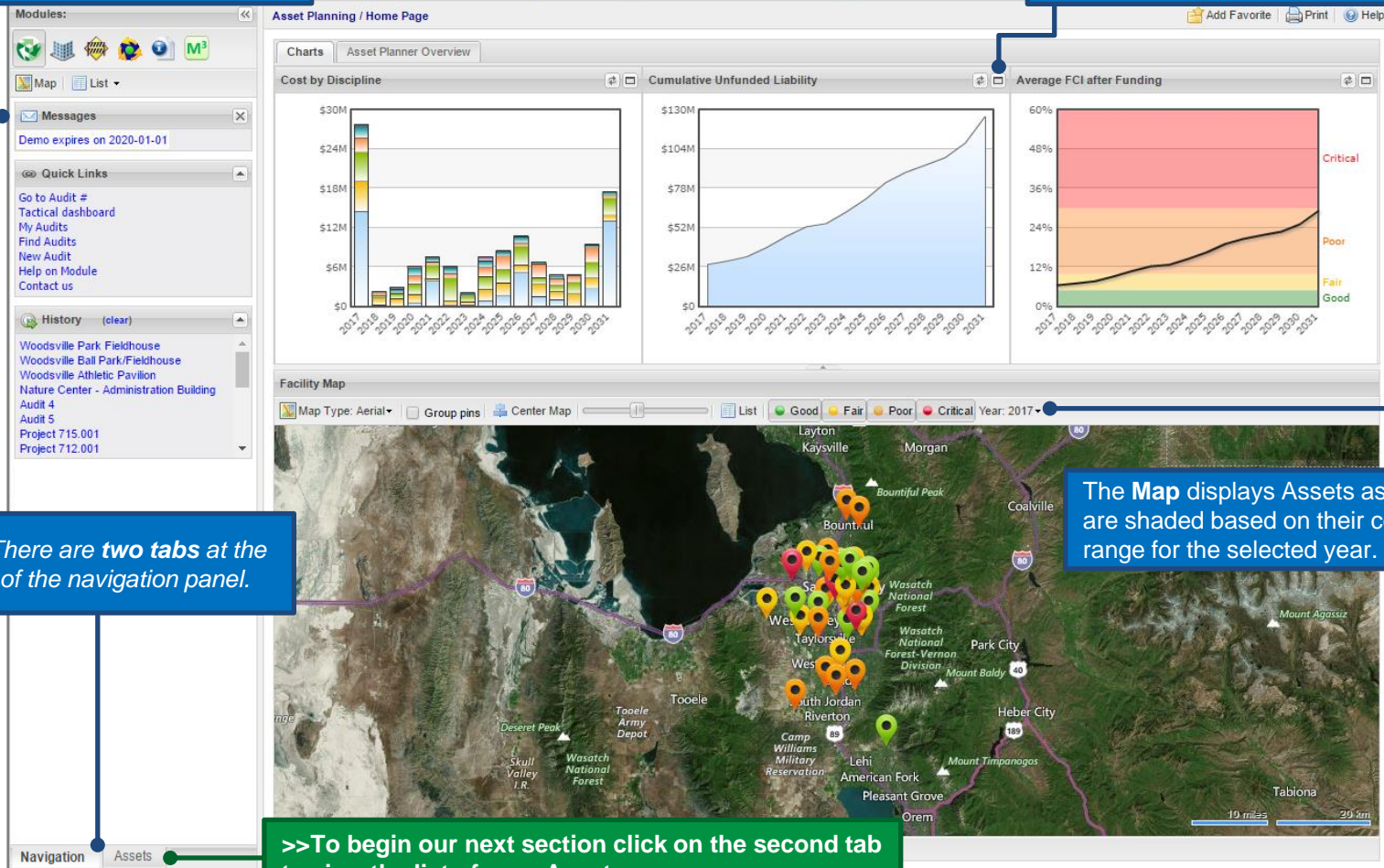
# Navigation:
## Screen Layout & Asset List

# Home Screen Layout

Upon logging in you will be taken to the home screen which displays a navigation panel to the left, charts across the top and a map of your assets in the bottom section of the screen.

The **Navigation Panel** contains system messages, quick links and a history of Assets or Audits last viewed.

**Charts** are located across the top of the screen. Each chart can be expanded by clicking on the box in the corner.



**13 - ASSET PLANNER DEMO**

Audits ▾ | Assets ▾ | Reports ▾ | Tool Box ▾ | Configure ▾ | Preferences ▾ | Admin ▾

Asset Planning / Home Page                    Add Favorite | Print | Help

**Modules:**

Map | List ▾

✉ Messages
Demo expires on 2020-01-01

🔗 Quick Links
Go to Audit #
Tactical dashboard
My Audits
Find Audits
New Audit
Help on Module
Contact us

🕘 History (clear)
Woodsville Park Fieldhouse
Woodsville Ball Park/Fieldhouse
Woodsville Athletic Pavilion
Nature Center - Administration Building
Audit 4
Audit 5
Project 715.001
Project 712.001

Charts | Asset Planner Overview

**Cost by Discipline** | **Cumulative Unfunded Liability** | **Average FCI after Funding**

**Facility Map**

Map Type: Aerial ▾ | Group pins | Center Map | List | ● Good | ● Fair | ● Poor | ● Critical | Year: 2017 ▾

*Note: There are **two tabs** at the bottom of the navigation panel.*

The **Map** displays Assets as pins that are shaded based on their condition range for the selected year.

Navigation | Assets

**>>To begin our next section click on the second tab to view the list of your Assets.**

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# Navigation Tools

The **Module** selection panel allows you to switch between different parts of the software and indicates the module you are currently viewing.

The M**enu Bar** is where you will find common features such as Reporting/Charts, Dashboard, Favorites, Audits, Preferences etc.

**13 - ASSET PLANNER DEMO**

Home ▾ | My Dashboard ▾ | Favorites ▾ | Audits ▾ | Assets ▾ | Reports ▾ | Tool Box ▾ | Configure ▾ | Preferences ▾ | Admin ▾

**Modules:** «

Map | List ▾

**View:**
Portfolio, Department, Site Name ▾

Portfolios
- Community Recreation Services
- Cultural Services (6)
- Emergency Services (33)
- Library (14)
- Municipal Services (10)
- Parks (8)

The **View** drop down menu allows you to view the Asset list in different grouping configurations.

**Asset Planning / Home Page**

Add Favorite | Print | Help

Charts | Asset Planner Overview

**Cost by Discipline**

**Cumulative Unfunded Liability**

**Average FCI after Funding**

$12M
$6M
$0
2017 2018 2019 2020 2021 2022 2023 2024 2025 2026 2027 2028 2029 2030 2031

$52M
$26M
$0
2017 2018 2019 2020 2021 2022 2023 2024 2025 2026 2027 2028 2029 2030 2031

60% Critical
48%
36% Poor
24%
12% Fair
0% Good
2017 2018 2019 2020 2021 2022 2023 2024 2025 2026 2027 2028 2029 2030 2031

**>>To begin our next section expand one of the grouping folders using the [+] sign.**

Aerial ▾ | Group pins | Center Map | List | Good Fair Poor Critical Year: 2017 ▾

*Note: we have now switched to the **second tab** to view the Asset list.*

69 items loaded

Navigation | Assets

# Asset List

The second tab on the Navigation Panel will display a listing of your Assets. This list is your primary navigation tool: click on an asset or grouping on the left and the middle panels will update with specific information relating to your selection.

*Note: when you click on a [+] sign to expand a Grouping Folder or Asset all related items will display below.*

The **List** button will take you to a grid style listing of your Assets and details relating to each.

Each **Asset** class will have its own icon: **Facilities** are represented by a Building and **Site** assets by a Tree icon.

**>>To begin our next section double click on an Asset name.**

# Review & Modify:
Asset Details, Data Grids & Photos

# Asset Details

**Double clicking** on an Asset name displays a form style view with details & tabs. *Note: You can also **right click** and select "**show details**" for a pop-up style form.*

**Tabs** across the top of the form allow you to view additional details relating to the Asset.



**13 - ASSET PLANNER DEMO**

*Remember: When in a form style view click **Save** to submit your changes.*

**Links** on the general tab allow you to quickly navigate to data linked to the Asset. *Note: these same links appear below each Asset in the navigation panel.*

**>>To begin our next section click on Elements**

# Element Inventory Grid

The Element grid, or published element inventory, contains a listing of inventory items that make up the selected Asset. This grid also contains Actions which are the forecasted replacement cost & year for each item.

>>To begin our next section use the Arrows to maximize your screen space.

**Settings** allow you to customize your view. Use settings to **turn on all available 'unused' categories**.

The **Category** tab allows you to filter the list of inventory items based on a specific category or category grouping.

**Filters** allow you to set criteria and narrow down the inventory listing.

**Attachments** are indicated by a paperclip icon. Hover over to view a preview or click on the paper clip to manage **pictures** & **documents**.

# Element Inventory Grid: Viewing & Editing

To **Add** or **Delete** an **Element** or **Action** first select the item in the list and then use the menu above the grid. *Note: You can also use the **right click** menu.*

Elements (inventory) in White

Actions (requirements) in Green

*Note (1): In some cases multiple **Actions** are linked to a single **Element**. In these cases you will see two or more actions on the green lines and duplicated information on the white lines.*

The **Element Number** indicates the number of unique elements for a given category. *Note: Additional Elements are typically added based on the following criteria: differing type, age or condition.*

*Note (2): The duplicated element lines are for display purposes in the combined grid and do not double count the replacement value.*

Years or Costs in **Black** indicate that they were generated by the model template. Costs in Red indicate that they were manually entered by a user.

Bountiful Springs Arena

| Combined Grid | Element Form | Charts | Map |

**Elements and Actions Combined View Bountiful Springs Arena**

Add ▾ | Delete ▾ | M² Create Measure | Relate Project | ✓ Complete | Filters | Export History

| Category ▲ | Element Number | Attachments | Replacement Cost | Last Major Action | Location… | Element Description | Commentary | Overall Condition | Action |
|---|---|---|---|---|---|---|---|---|---|
| A10 - Foundations | 1 | | 122,461 | 1990 | | Concrete foundations | | Good | |
| B10 - Superstructure | 1 | 🖉 | 924,723 | 1990 | | Glu-lam beams and trusses supporting roof, fastened to concrete abutments. | | Good | |
| B2010 - Exterior Walls | 1 | 🖉 | 25,988 | 1990 | | Concrete block. | Textured, colored, with matching colour mortar. | Good | |
| B2010 - Exterior Walls | 2 | 🖉 | 4,366 | 1990 | | Painted concrete block on south elevation. | | Fair | Re-paint concrete block within 3 years. | Repair |
| B2010 - Exterior Walls | 2 | 🖉 | 4,366 | 1990 | | Painted concrete block on south elevation. | | Fair | Unpainted concrete block was observed under storefront glazing on north elevation. Apply primer and paint to existing unpainted concrete block | Priming and painting concrete block is suggested to protect it from moisture ingress. | Repair |
| | | | 25,988 | 1990 | | Painted engineered wood components (posts and beams) surrounding storefront glazing on south and north elevations. | | Fair | |
| | | | 51,975 | 1990 | | Factory colour-finished square profile corrugated siding at west and east elevation gable ends. (1600 sf / gable end) | | Good | |
| B2020 - Exterior Windows | 1 | 🖉 | 76,275 | 2016 | | Tinted single pane storefront glazing located in north, south and west elevations. | | Good | Replace existing single pane storefront with metal frame insulated pane storefront glazing. | Replacement |
| B2020 - Exterior Windows | 2 | 🖉 | 1,559 | 1990 | | Metal service counter used for ticket-taking in south elevation of window wall is in existing serviceable condition. | | Good | Replace metal ticket taking service counter | Study |
| B2030 - Exterior Doors | 1 | 🖉 | 0 | 1990 | | Exterior flat panel metal swing exit doors c/w panic hardware, no glazing. | Metal frame, storefront doors with single-glazed panes. qty = 12 pairs. Included with metal-frame storefront glazed Exterior | Good | |
| B2040 - Industrial Doors | 1 | 🖉 | 5,198 | 1990 | | Sectional roll-up overhead doors, manually operated. | One in exterior wall, one in interior wall. | Fair | Re-paint metal overhead roll-up doors within 3 years. | Repair |
| B30 - Roofing | 1 | 🖉 | 8,316 | 1990 | | Profiled sheet metal cladding protecting beams at roof overhangs, mechanically | | Good | |

◀ | ◀ | Page 1 of 1 | ▶ | ▶| | ⟳     Displaying 1 - 89 of 89

# Completing Actions in the *Asset Planner* module

To complete an action navigate to the Asset and Element grid and then select the item that was completed. It is important to review and correct any information that is incorrect. If you discover that the action was not scheduled in the correct year make sure to adjust the Action Year prior to completing the action.

**Note:** If your database has the project planning module enabled please refer to the project planner quick start guide on how to properly close out a project linked to an action.

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

**Step 2:** Select the row containing the element you would like to update.

**Step 3:** Review the **Action** information and ensure that the **Action Cost** is correct and the **Action Year** is scheduled for the year that the work was completed.

**>>Step 4: Click on the "Complete" button and skip ahead to Page 8**

# Completing Actions: Action Cycling Options

When you click on the Complete button in Asset Planner or set the status to Completed in Project Planner 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.

**Complete Action parameters**  ✕

Specify cycling method

- ⦿ Cycle (will create next action occurence if Repeat Interval > 0)
- ○ Cycle based on template (will determine if next action occurence is needed based on company setting and template configuration)

Specify cost type to use for next action occurence

Specify what type of cost will be used for element replacement value and future action cost

- ⦿ User defined cost (where applicable)
- ○ Default cost (Template model cost)

Advanced Mode          Submit          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.**

# Completing Actions: Final Steps

Once you have completed an action the software will automatically archive the original action & project and it will generate a new replacement action based on the parameters selected. Some final data management steps 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.

# Reporting:
## Data Exports & Charts

# Reporting & Charts Home Page

The **Reports** button on the **Menu Bar** will provide you with access to all Charts & Report Exports

The **Reports Home Page** displays a helpful description next to each available report.

## 13 - ASSET PLANNER DEMO

Reports | Tool Box | Config

- Asset Planning Reports Home Page
- Create Dashboard
- Building Condition Assessment Report
- Completed Actions
- Cost by Detail
- Cumulative Costs
- Facility Condition Index
- Facility Details
- FCI - Excel Report
- FCI Grid
- Needs Report Summary
- Reserve Fund Study
- Unfunded Liability
- Audit Reports
- Facility Data Reports
- My Reports

*Note: Reports with an **Excel icon** indicate exportable reports. Reports with a **Chart icon** indicate Charts & Grids displayed directly in the software.*

### Reports

| | Report | Description |
|---|---|---|
| | Building Condition Assessment Report | Printable PDF report of assessment data for selected Facilities. |
| | Completed Actions | Excel report of all Facility completed actions for selected items |
| | Cost by Detail | Displays financial needs based on element inventory and actions required and ability to group by other detail such as Discipline, Area etc. |
| | Cumulative Costs | Displays cumulative financial needs based on element inventory and cost of actions required. |
| | Facility Condition Index | Displays FCI values by year and may include comparison of current funding vs funding required to reach a target FCI. |
| | ...Details | Excel report of all Facility details including custom details if defioned for selected items |
| | ...xcel Report | Excel report of Facility Condition Index values by year for selected facilities. |
| | FCI Grid | Displays 30 year FCI Grid by 5 year increments with FCI color coding. |
| | Funding and Strategies | Displays chart showing funding and saving strategies allocated to facilities. |
| | Needs Analysis | Displays total costs of needs based on element inven... scheduled. |
| | Needs Report Data Export | Excel report of all Facility needs for selected items. |
| | Needs Report Export - By Facility | Excel report of all Facility needs for selected items organized by Facility |
| | ...Report Summary | Excel report of all Facility needs summarized by year. |
| | ...e Fund Study | Excel report of all Facility needs with ability to display reserve fund data. |
| | ...ed Liability | Displays unfunded liability after applying selective funding or savings strategies against the needs. |

>>To begin our next section select the Needs Report Data Export

Folders contain additional reports including those that have been customized and saved. **My Reports** contain reports that you have saved for your own personal use.

# Report Options

**Needs Report**

**General Filters** | Priority Question Filters | Custom Details | Report Fields

**Tabs** across the top of the Report allow you to apply additional filters your report. **Report Fields** allow you to customize the exact columns that are displayed and the order they appear.

The **Period & Fiscal Year Range** allow you to limit the data export based on a period or year range.

Period: 15 Years
Fiscal Year Range: 2017 to 2031
Include all scheduled actions: ☐
Include elements without actions: ☐
Include category custom details: ☐
Portfolio:
Department:
Site Name:
Asset Class:
Asset Function:
Asset:
Facility Status:
Categories: Select...
Discipline:
Maintenance Type:
Validated:
Action Data Source:
Action Type:
Overall Condition:
Priority:
Status:
Funding:
Include Element Pictures: No

*Note: If you prefer to export **All Data** regardless of period or year range then select **Include all scheduled actions** & **Include elements without actions**.*

The drop down fields allow you to filter the Assets to report on based on an Asset **Grouping** or by **Asset Class**. *Tip: You can type into a field to search for a grouping label.*

**Categories** and **Discipline** allow you to filter the report based on a specific Element or group of Elements.

**>>To begin our next section select Save Report Settings**

Report | Back | Save Report Settings | Delete Report | Help

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# Saving Reports

It is important to give your report a unique **Title** as this will allow you to differentiate between your saved reports.

The **Description** allows you to provide a brief summary of the Reports main use and function. This is especially important if you are saving the report for others to use.

Clicking **Save** will save the report to the folder you have selected. If you are saving an existing report you have the option to **Save as New** which will save a new version of the report.

**Company Reports** are available to all users in the database.

**My Reports** are available to your user account only.

**User Group** reports are available to anyone who belongs to your user group (ex. Admin Users, Read & Report, Etc.)

To **Delete** a saved report first open the report by selecting it in the reports menu, then on the report filters page select **Delete Report**.

>>**To begin our next section go to the Reports Menu and select the Cost by Detail Report**

**Needs Report**

General Filters | Priority Question Filters | Custom Details | Report Fields

**Save Report**

Title: * Priority Roofing Needs Report

Description: Excel report of 5 Year Priority Roofing needs for the portfolio.

Menu: * Reports

Sub Menu: * My Reports

Company Reports
Facility Data Reports
My Reports
Ameresco Group Reports

Saves a copy ... ur "My Reports" folder in the Reports menu or you r ... roup members to see or to other folders (permi...

Save | Save as New | Cancel

B30 Roofing

Categories: Select...

Discipline:

Maintenance Type:

Validated:

Action Data Source:

Action Type:

Overall Condition:

Priority:

Status:

Funding:

Include Element Pictures: No

Report | Back | Save Report Settings | Delete Report | Help

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# Charts

Filters allow you to customize the data displayed. *Tip:* You can also click on an **Asset or Grouping** in the **Navigation Panel** to filter the chart.

These two drop down fields allow for further customization of the chart data sources & function.

You can **save** the Chart as an **image** or **print** using the icons in the top right corner.

The chart icon allows you to customize the look and style of the chart.

Click on a bar to view **all related actions.**
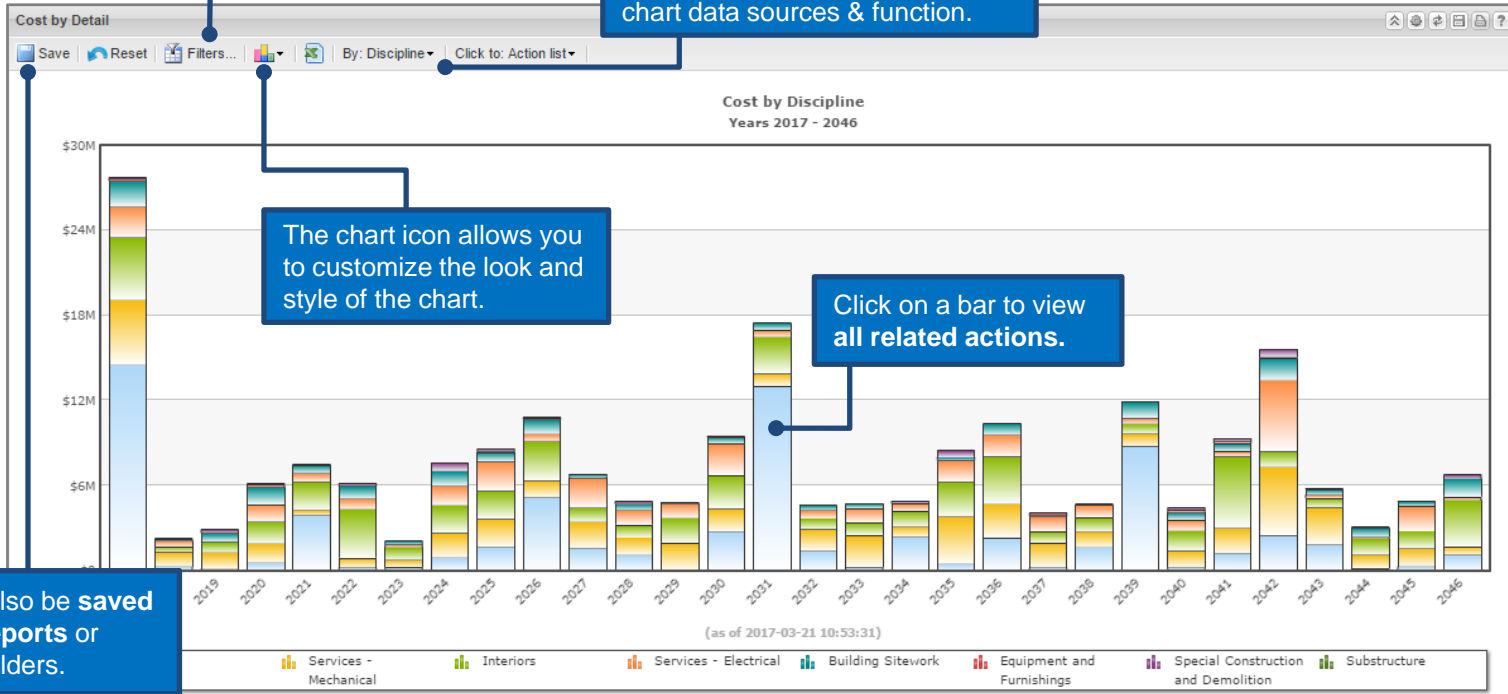
Charts can also be **saved** to the **My Reports** or **Company** folders.

**Summary** information is displayed below the chart. The **Excel** button above the chart will provide an export of these data points.

Cost by Detail

Save | Reset | Filters... | | | By: Discipline ▾ | Click to: Action list ▾

**Cost by Discipline**
**Years 2017 - 2046**

$30M
$24M
$18M
$12M
$6M

2019 2020 2021 2022 2023 2024 2025 2026 2027 2028 2029 2030 2031 2032 2033 2034 2035 2036 2037 2038 2039 2040 2041 2042 2043 2044 2045 2046

(as of 2017-03-21 10:53:31)

Services - Mechanical | Interiors | Services - Electrical | Building Sitework | Equipment and Furnishings | Special Construction and Demolition | Substructure

| Cost by Discipline Years 2017 - 2046 | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Discipline | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | 2032 | 2033 |
| Shell | $14,461,329 | $270,864 | $88,102 | $535,079 | $3,893,922 | $212,526 | $239,086 | $898,434 | $1,634,124 | $5,149,950 | $1,556,342 | $1,075,958 | | $27,995 | $2,727,201 | $13,021,190 | $1,371,415 | $234,824 | $2... |
| Services - Mechanical | $4,589,037 | $1,036,875 | $1,173,845 | $1,344,289 | $363,373 | | $679,723 | $505,698 | $1,749,714 | $2,008,844 | $1,196,795 | $1,857,493 | $1,250,690 | $1,932,126 | $1,633,513 | | $871,822 | $1,545,941 | $2,251,252 |
| Interiors | $4,433,505 | $385,851 | $742,027 | $1,555,075 | $1,982,047 | $3,429,291 | $871,433 | $1,943,524 | $1,972,422 | $2,757,070 | $1,009,164 | | $901,256 | $1,733,047 | $2,363,925 | $2,559,858 | $757,336 | $906,935 |
| Services - Electrical | $2,159,764 | $409,190 | $21,830 | $1,222,177 | $610,842 | | $733,595 | $230,770 | $1,367,090 | $2,075,328 | | $514,555 | $2,096,402 | $1,024,431 | $1,028,376 | $2,231,834 | $501,952 | $565,625 | $982,851 |
| Building Sitework | $1,825,216 | $141,131 | $602,585 | $1,231,696 | $585,136 | | $875,522 | $226,612 | $1,049,915 | $658,791 | $1,032,976 | $278,431 | $437,084 | $118,230 | $446,987 | $472,886 | $347,636 | $349,966 |
| Equipment and Furnishings | $144,305 | $22,769 | $34,763 | $209,286 | $64,969 | | $53,742 | $0 | $0 | $58,212 | $111,747 | $33,229 | $0 | $2,079 | $56,861 | $21,830 | $8,316 | $0 | $0 |
| Special Construction and | $61,328 | $26,575 | $222,313 | $18,398 | $0 | | $168,400 | $10,395 | $585,241 | $175,676 | $18,711 | $0 | $159,564 | $12,474 | $0 | $0 | $0 | $155,926 | $467,777 |

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# Tips & Tricks:
Tools & Customization

# Tips & Tricks

**Favorites** allow you to save commonly used links in the software (similar to the favorites function on your browser).

The **Tool Box** contains many useful links including **Funding & Savings** and the **Shared Documents** folder.

**Help** buttons (blue question marks) are located throughout the program. Clicking on them will provide with information specific to the page you are viewing.

**AssetPlanner**

**13 · ASSET PLANNER DEMO**

Home ▾ | My Dashboard ▾ | Favorites ▾ | Audits ▾ | Assets ▾ | Reports ▾ | Tool Box ▾ | Configure ▾ | Preferences ▾ | Admin ▾

Asset Planning / Home Page

Add Favorite | Print | Help

Modules: «

Map | List ▾

View:
Portfolio, Department, Site Name

Portfolios
- Community Recreation Services
- Cultural Services (6)
- Emergency Services (33)
- Library (14)
- Municipal Services (10)
- Parks (8)

**My Dashboard** allows you to design a customized home screen layout.

Charts | Asset Planner Overview

Cumulative Unfunded Liability

$130M
$104M
$78M
$52M
$26M
$0
2017 2018 2019 2020 2021 2022 2023 2024 2025 2026 2027 2028 2029 2030 2031

Average FCI after Funding

60%
48% — Critical
36%
24% — Poor
12% — Fair
0% — Good
2017 2018 2019 2020 2021 2022 2023 2024 2025 2026 2027 2028 2029 2030 2031

$24M
$18M
$12M
$6M
$0
2017 2018 2019 2020 2021 2022 2023 2024 2025 2026 2027 2028 2029 2030 2031

Clicking on **Home** will take you back to the main dashboard.  This can also be done by clicking on any of the **Module icons**.

Facility Map

Map Type: Aerial ▾ | Group pins | Center Map | List | Good Fair Poor Critical Year: 2017 ▾

69 items loaded

Navigation | Assets
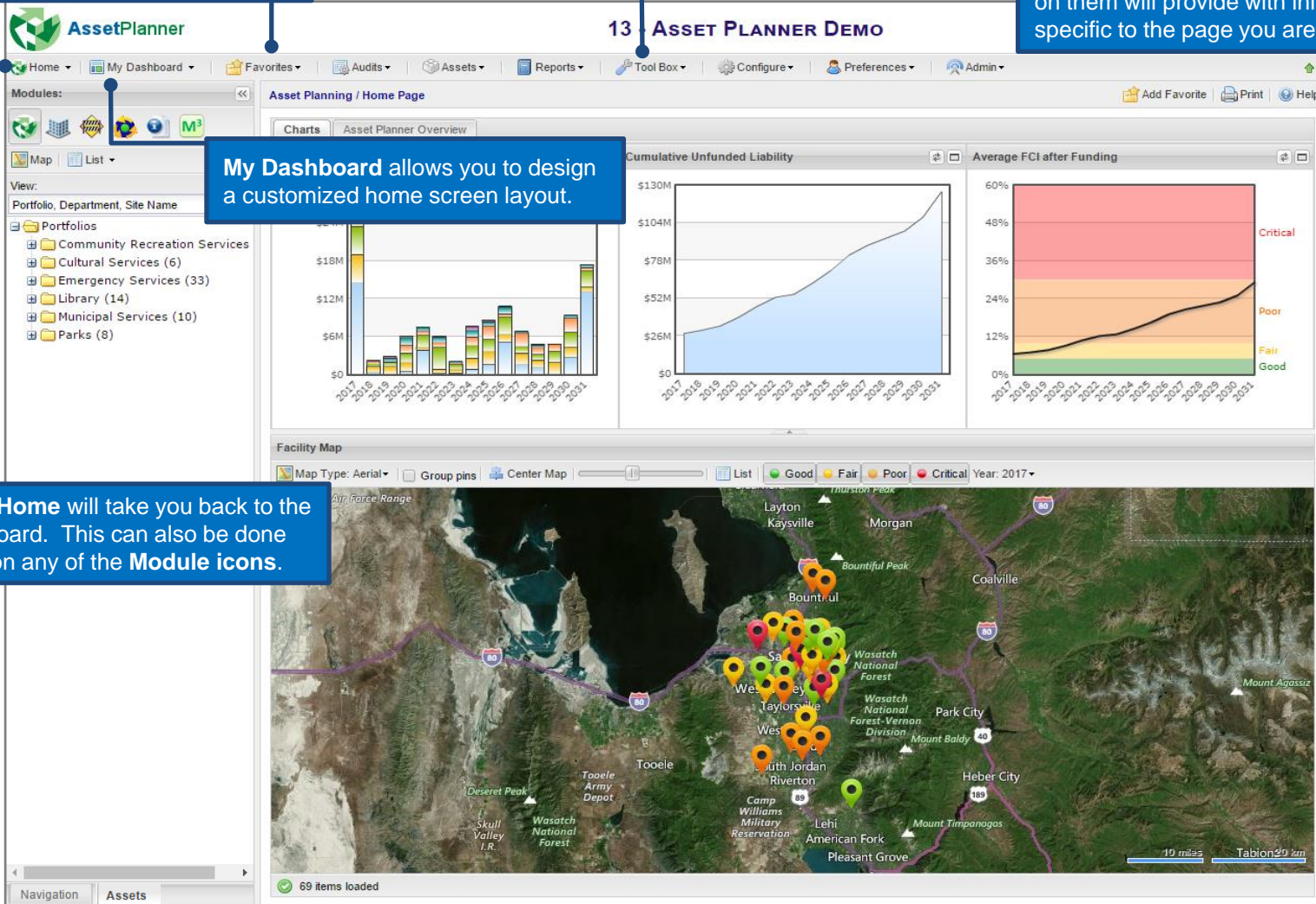
# Tips for Working in Grids

Use **Browse Pictures** to view all pictures or the **BCA report** to generate a visual report of the data.

**Search** allows you to search for key words within the text fields. *Tip: Click on the **arrow** beside **Search** to select specific fields to search on.*

**Column headers** can be clicked on to sort. You can also change the **position** of a **column** by clicking and dragging.

This **blue icon** appears above all grids and allows you to specify the **columns** to display by using the **checkbox** beside the field name.

**Export** will produce an excel version of the data.

The grid may be organized into **Pages** depending on your user **Preferences.** **>>To begin the next section click on Preferences in the Menu Bar.**



Element Inventory Bountiful Springs Arena for Bountiful Springs Arena

Settings | Browse Pictures | BCA Report

Combined Grid | Element Form | Charts | Map

Elements and Actions Combined View Bountiful Springs Arena

Add | Delete | Create Measure | Relate Project | Complete | Filters | Export History | Export | Search

| Category | Element Number | Attachments | Replacement Cost | Last Major Action | Location... | Element Description | Comment | Action Details | Action Type |
|---|---|---|---|---|---|---|---|---|---|
| A10 - Foundations | 1 | | 122,461 | 1990 | | Concrete foundations | | | |
| B10 - Superstructure | 1 | | 924,723 | 1990 | | Glu-lam beams and trusses supporting roof, fastened to concrete abutments. | | | |
| | | | 25,988 | 1990 | | Concrete block. | Textured, | concrete block | Repair |
| | | | 4,366 | | | | | concrete block | Repair |
| | | | 4,366 | | | | | Priming and painting concrete block is suggested | Repair |
| B2010 - Exterior Walls | 3 | | 25,988 | | | surrounding storefront glazing on south and north elevations. | | ngineered wood ts surrounding lazing on south & tions. | Repair |
| B2010 - Exterior Walls | 4 | | 51,975 | 1990 | | Factory colour-finished square profile corrugated siding at west and east elevation gable ends. (1600 sf / gable end) | | | |
| B2020 - Exterior Windows | 1 | | 76,275 | 2016 | | Tinted single pane storefront glazing located in north, south and west elevations. | | isting single pane ith metal frame ane storefront | Replacement |
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| B2030 - Exterior Doors | 1 | | 0 | 1990 | | Exterior flat panel metal swing exit doors c/w panic hardware, no glazing. | Metal fra doors wit glazed pa pairs. Incl metal-fra glazed Ex | | |
| B2040 - Industrial Doors | 1 | | 5,198 | 1990 | | Sectional roll-up overhead doors, manually operated. | One in ex interior w | etal overhead roll- ithin 3 years. | Repair |
| B30 - Roofing | 1 | | 8,316 | 1990 | | Profiled sheet metal cladding protecting beams at roof overhangs, mechanically fastened. | | | |

Select All
Reset Columns
Company Defaults...
Asset
☑ Category
☑ Element Number
Category Code
ID
Element ID
Element Modified
☑ Attachments
Asset
Maintenance Type
☑ Replacement Cost
☑ Last Major Action
☑ Location/Name
☑ Element Description
☑ Commentary
☑ Overall Condition
Validated
Definition
Category ID
Facility ID
Action ID
Action Modified

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# User Preferences

**Tabs** across the top allow you to customize **Module Specific** Preferences.

To customize your **AssetPlanner** experience click on **Preferences** button in the **Menu Bar.**

**Paginate Listings** sets the number of items displayed per page. In this example any grids larger than 50 items would display on multiple pages.

**Number of History Items to Keep** sets the number of history items saved & displayed on the **Navigation Panel**.

You can **change your password** or **log out** using the buttons located across the bottom.

## AssetPlanner — 13 - ASSET PLANNER DEMO

Home ▾ | My Dashboard ▾ | Favorites ▾ | Audits ▾ | Assets ▾ | Reports ▾ | Tool Box ▾ | Configure ▾ | Preferences ▾ | »

Asset Planning / Preferences                          Add Favorite | Print | Help

### Preferences

| General | Projects | PM | Service Requests |

| Paginate Listings: | 50 Items |
| Notes Display Order: | Display Most Recent Note Last |
| Print button action: | Print |
| Page Break between Sections on Reports: | Yes |
| Default Fiscal Year Selection: | Yes |
| Remember last Cost Item entered: | Yes |
| Number of History Items to keep: | 20 |
| Color Theme: | Gray |

Save | Change Password | Logout | Help