Administrator Configuration Settings for ***AssetPlanner***™

AssetPlanner

Confidential & Proprietary

Configure Company Settings

AssetPlanner

Confidential & Proprietary

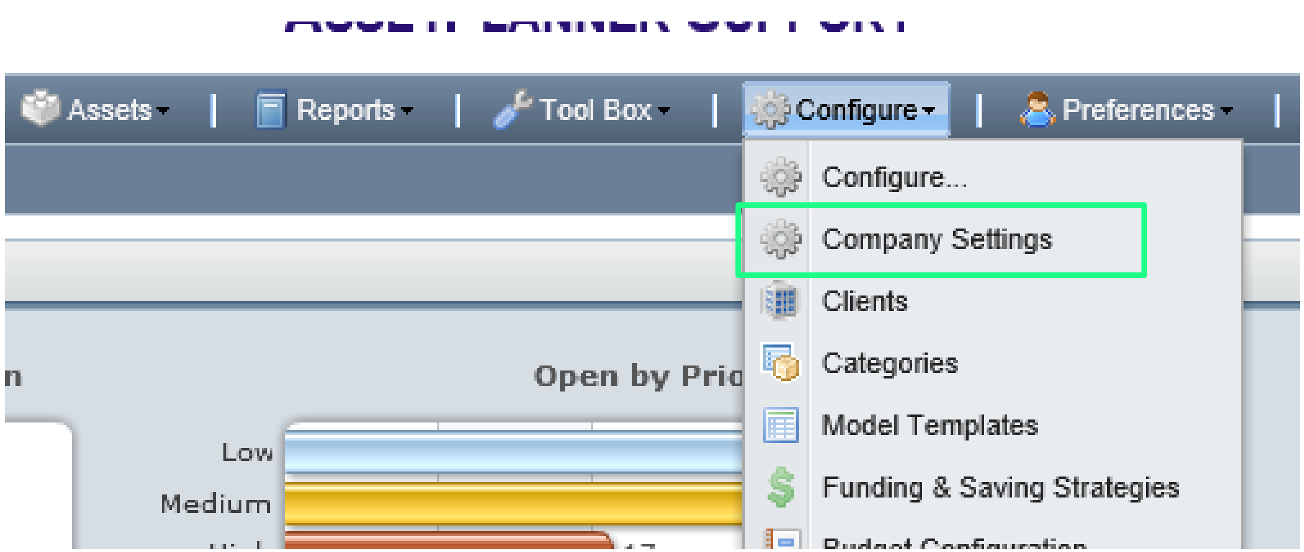
Configure – Company Settings

As an administrator user type for the AssetPlanner ™ software, you will have the authority and permission level to adjust the company settings for the database.

To access the company settings, after logging in, go to the Configure button in the menu bar and select "Company Settings".

Several tabs will appear in the next screen based on the modules that you use in the software suite.

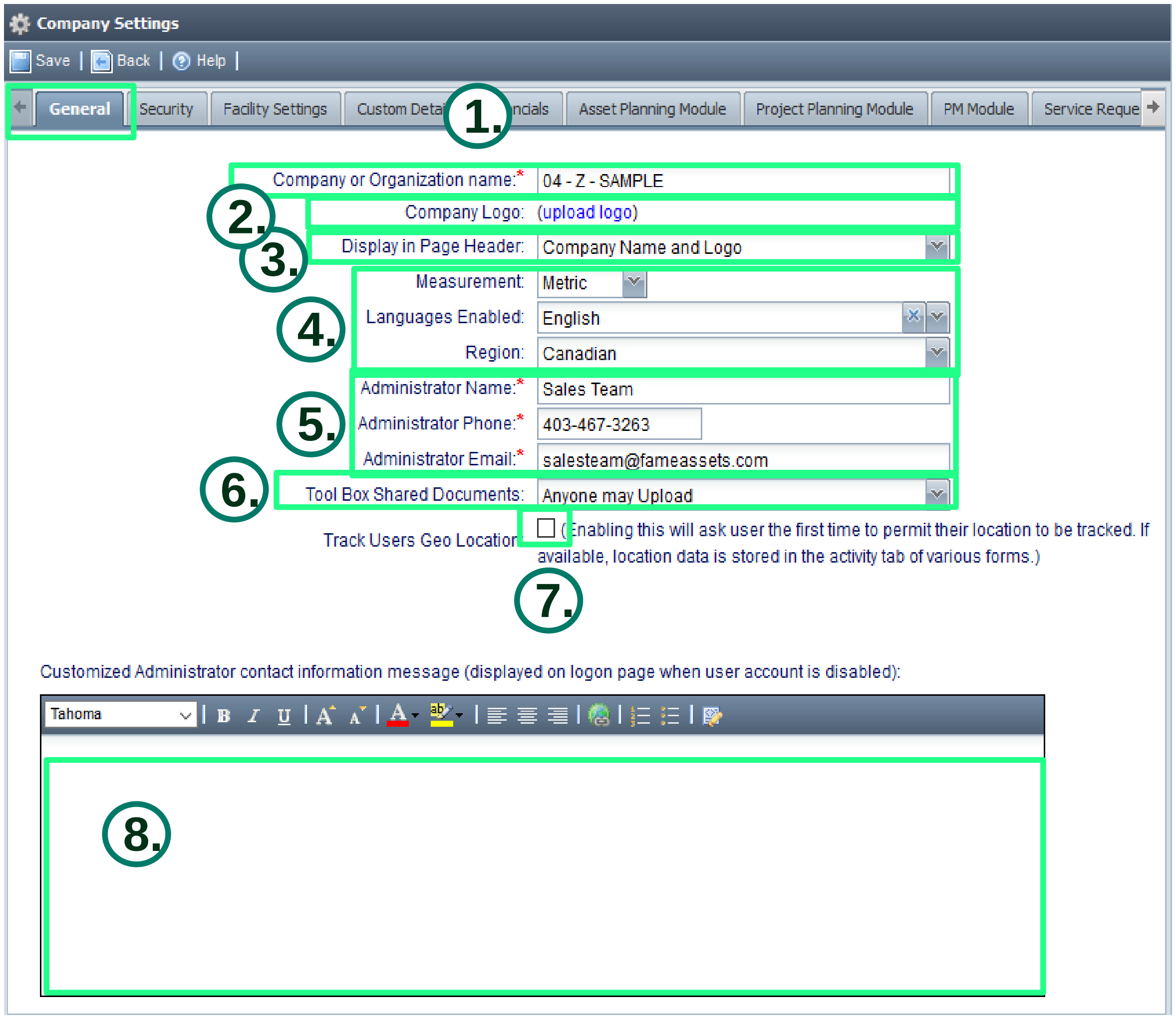
The pages that follow will provide a description and direction of how the settings can be adjusted.



General Settings

Company Settings – General Tab

This tab allows you to set general information about your Company and main administrator as well as some set some general features.



1. Enter the **Company or Organization name** that you would like to appear on the top part of the AssetPlanner™ database.

2. Upload your **Company Logo** with gif or jpg format. This will appear at the upper left of your database.

3. Choose from the three options on what you would like to **display in page header**:
- Company Name and Logo
- Company Name Only
- Logo Only

4. Select the **Language** and **Measurement** that you would like to use as well as your **Region**.

5. This is where the **Administrator's contact** Name, Phone number, and Email address is listed. Administrator is the main contact of the database.

6. Let **anyone** or limit to **only Administrator** who can upload files or documents to the **Share Documents** under Tool Box.

7. Check the box if you want to **track the location** of the user.

8. Customize the message that you would like to display on logon page when user account is disabled.

Facility Settings

Company Settings – Asset/Facility Settings

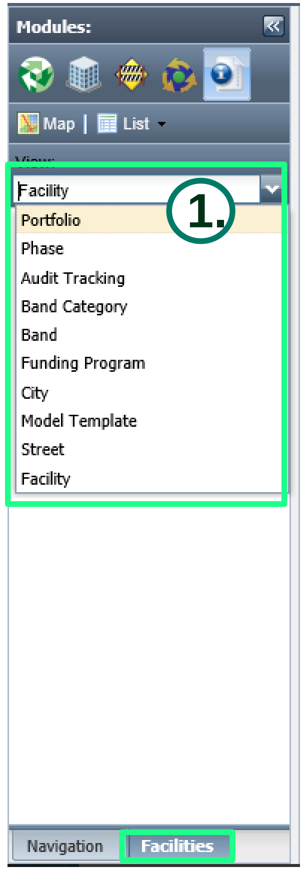
The database provides an opportunity to create various database structures or groupings when displaying or viewing the data

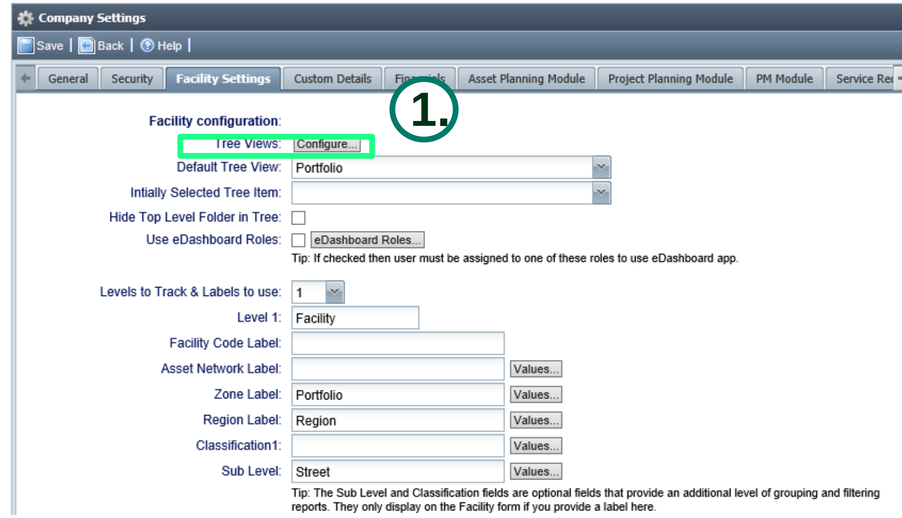
1. To configure the options for "Tree Views" on the Facilities tab, click on the "Configure" button next to Tree Views.

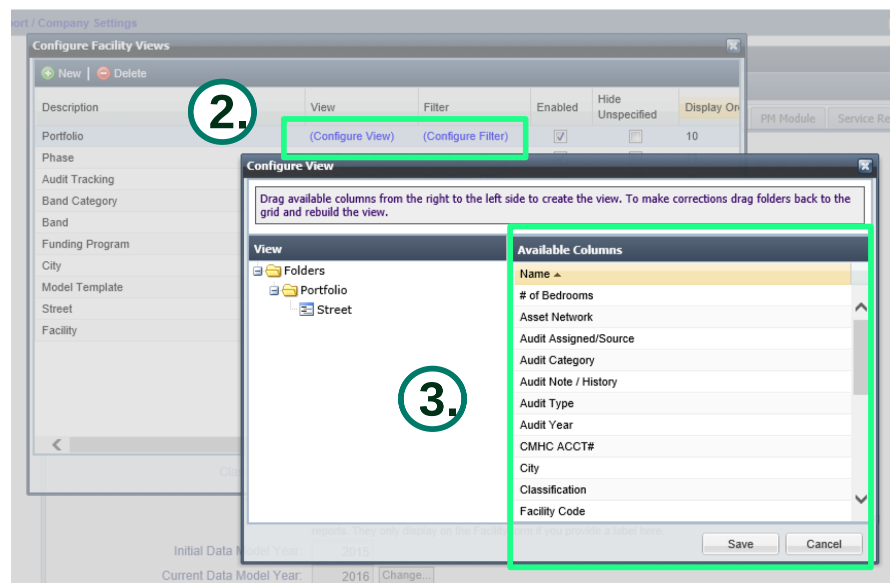
2. In the configuration window, click on the "New" button to set up a tree view. Add a title as to how you want to describe the view.

3. Next, click on the Configure View option. Here is where you will select from available columns of data to be organizational choices when viewing the data.
When all the levels of organization have been selected, press Save

To create a filtered view of this option, click on the Configure Filter option and set the filters. Press Save to retain the settings.

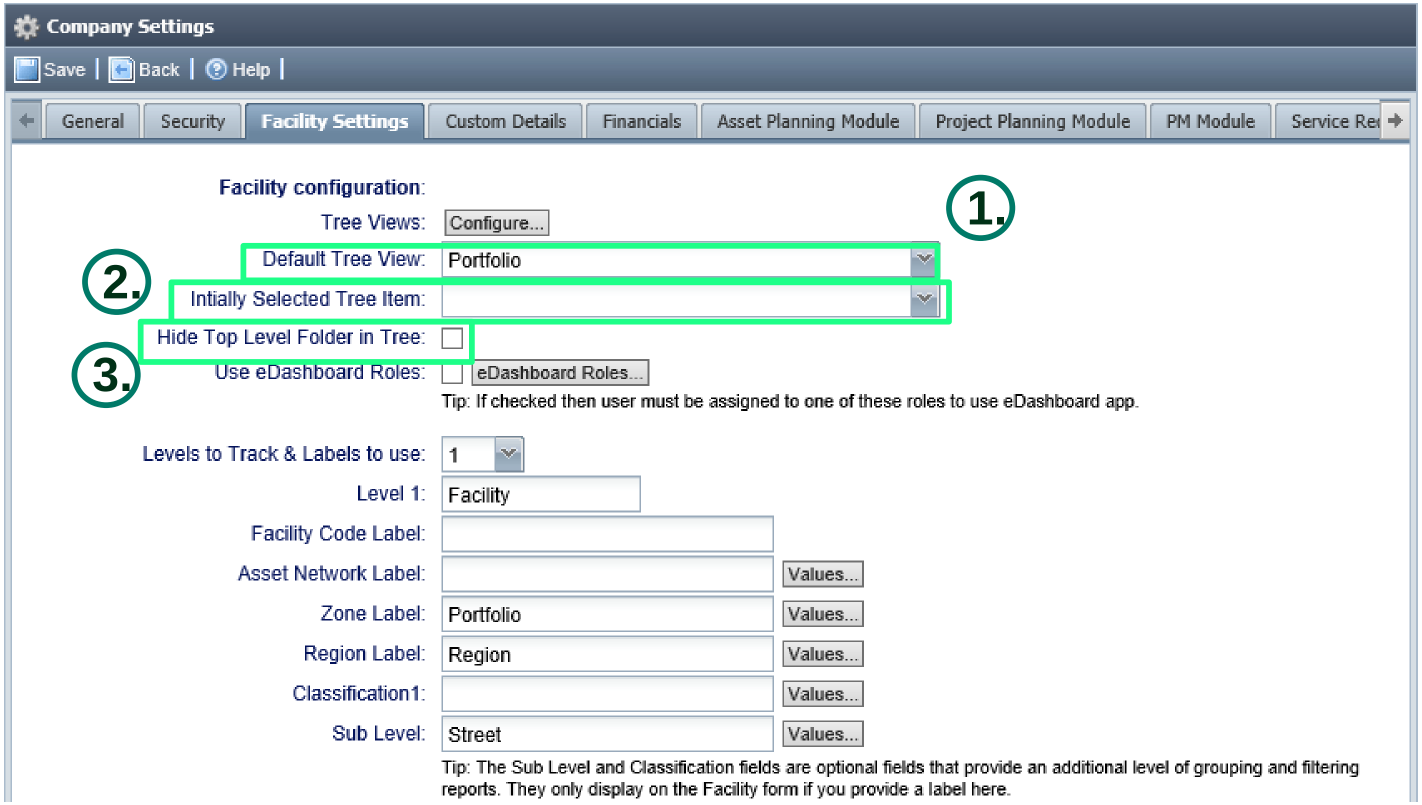






Company Settings – Asset/Facility Settings

You have now generated a list of ways to organize or filter data using the "Tree View.



1. After you have created the various views for your data, set anyone of them as the default view to display the data when in any of the modules your database is utilizing.

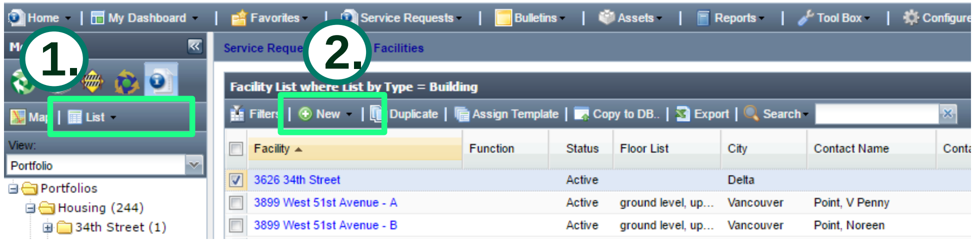
2. Set the initial selected item for the tree view by selecting from the drop down menu

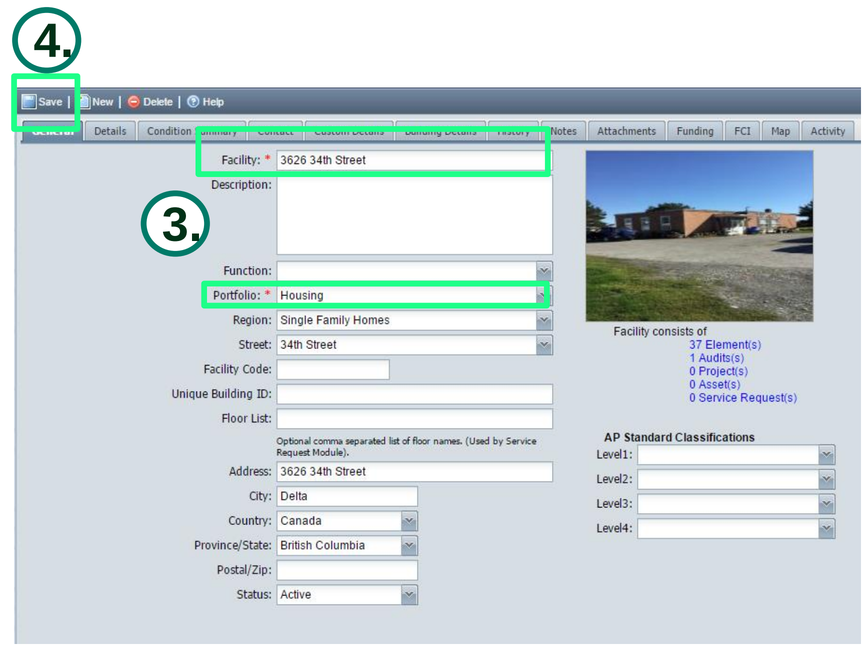
3. Check off the box if the need is required to hide a top level folder in the Tree View.

Company Settings – Asset/Facility Settings

You can add a new facility to the database by going through the following steps. These steps can only be carried out by an Admin. Or Config. Admin. User.

1. Click on the List icon found near the top left corner of the screen
2. Click on the new button
3. When then next screen pops up, you will need to fill in all the fields that have an asterisk on the General Tab of the facility information at a minimum – Facility Name and Portfolio. The other fields can be filled in later if you don't have all the information at your fingertips.
4. Press Save to see it appear in the Facility Tree in the left hand side of the screen as well as in the Service Request module.





To archive a facility in the database, set the status to in Active. This will remove it from all reports in the database but allow you to refer back to it or include it as long as you search for "inactive" facilities in the status fields of the reports.

Custom Details

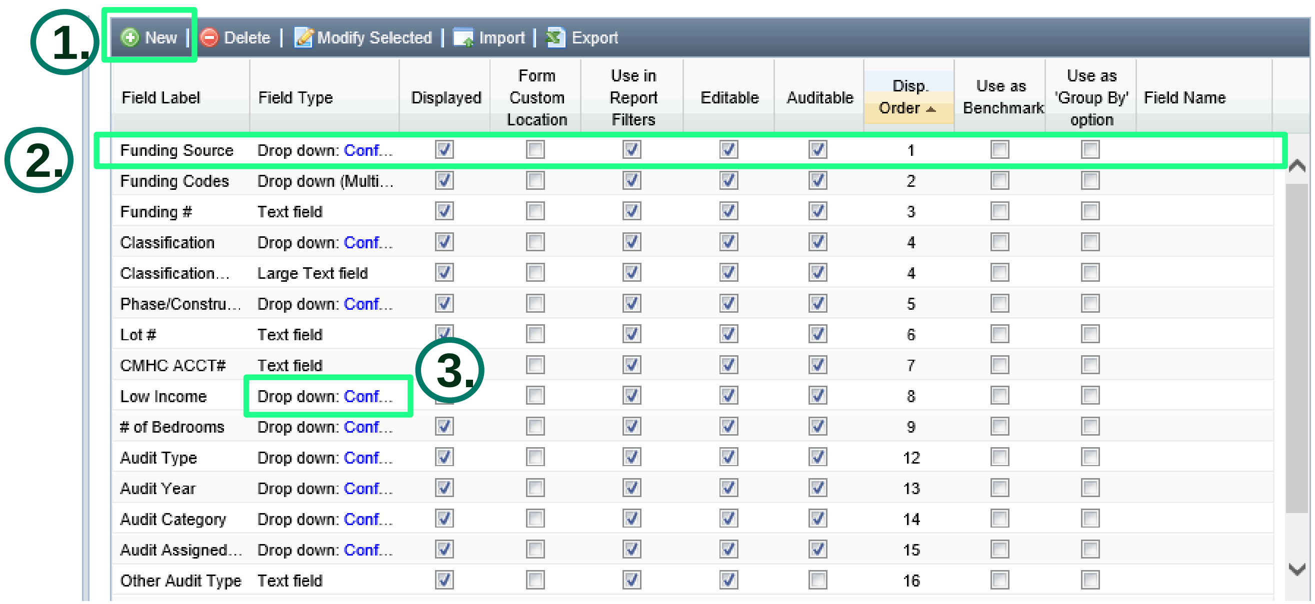
Company Settings - Custom Details

The system provides the option to create Custom Detail fields that appear on a separate tab against each facility.

1. To create a new custom detail field, click on the New button and type in a field label.

2. After entering the Field label, tab through the columns to configure how you want to set the custom field up such as the Field type, where to use in report filters and the order in which to display the field.

3. For those fields that require a drop down menu, click on the Configuration link to generate the drop down list options.



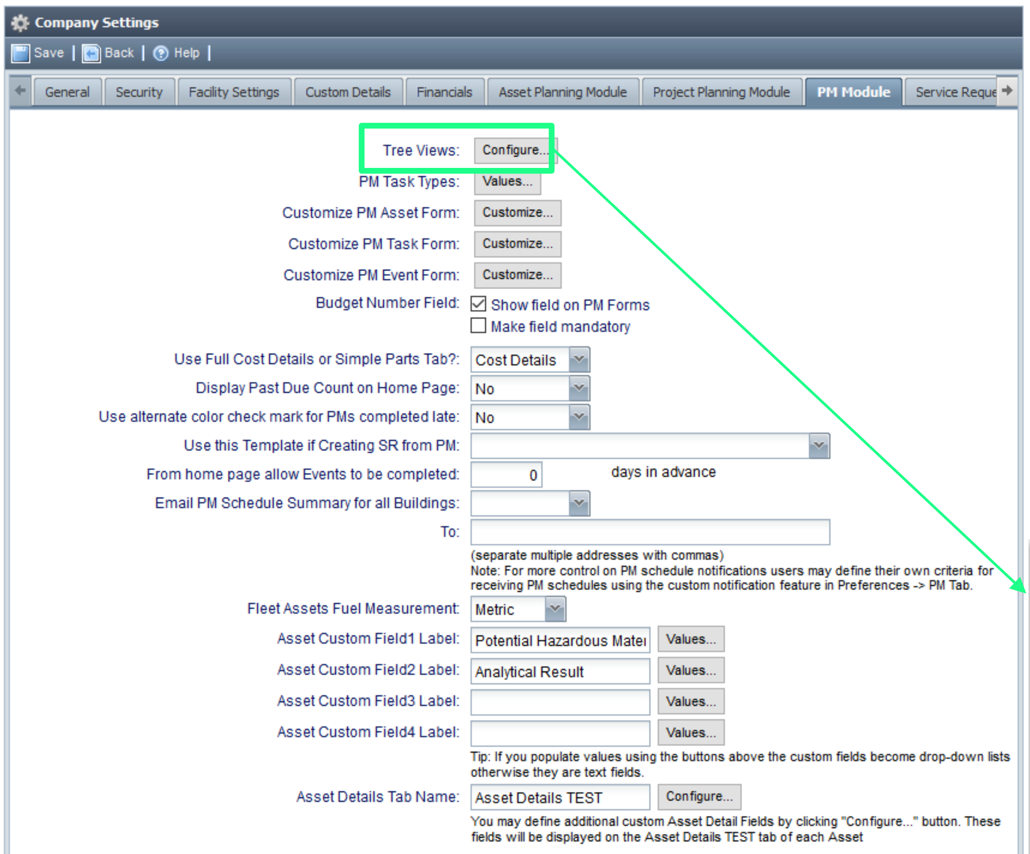
Field Label	Field Type	Displayed	Form Custom Location	Use in Report Filters	Editable	Auditable	Disp. Order	Use as Benchmark	Use as 'Group By' option	Field Name
Funding Source	Drop down: Conf...	☑	☐	☑	☑	☑	1	☐	☐	
Funding Codes	Drop down (Multi...	☑	☐	☑	☑	☑	2	☐	☐	
Funding #	Text field	☑	☐	☑	☑	☑	3	☐	☐	
Classification	Drop down: Conf...	☑	☐	☑	☑	☑	4	☐	☐	
Classification...	Large Text field	☑	☐	☑	☑	☑	4	☐	☐	
Phase/Constru...	Drop down: Conf...	☑	☐	☑	☑	☑	5	☐	☐	
Lot #	Text field	☑	☐	☑	☑	☑	6	☐	☐	
CMHC ACCT#	Text field	[illegible]	☐	☑	☑	☑	7	☐	☐	
Low Income	Drop down: Conf...	[illegible]	☐	☑	☑	☑	8	☐	☐	
# of Bedrooms	Drop down: Conf...	☑	☐	☑	☑	☑	9	☐	☐	
Audit Type	Drop down: Conf...	☑	☐	☑	☑	☑	12	☐	☐	
Audit Year	Drop down: Conf...	☑	☐	☑	☑	☑	13	☐	☐	
Audit Category	Drop down: Conf...	☑	☐	☑	☑	☑	14	☐	☐	
Audit Assigned...	Drop down: Conf...	☑	☐	☑	☑	☑	15	☐	☐	
Other Audit Type	Text field	☑	☐	☑	☑	☐	16	☐	☐	

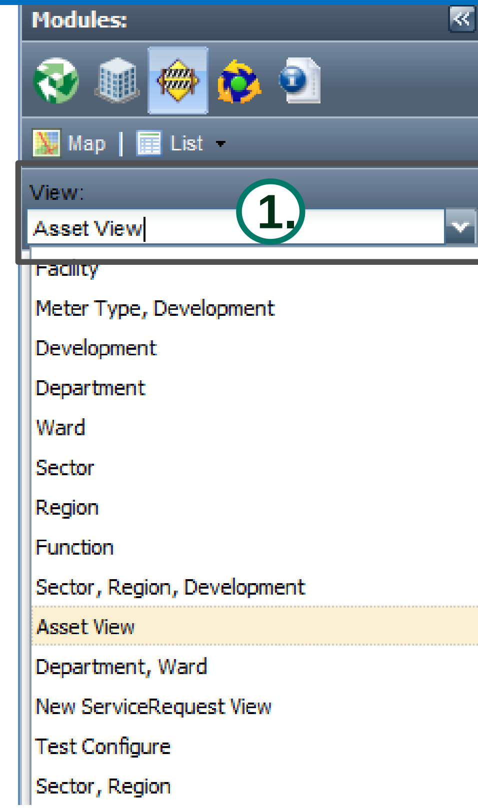
PM Module

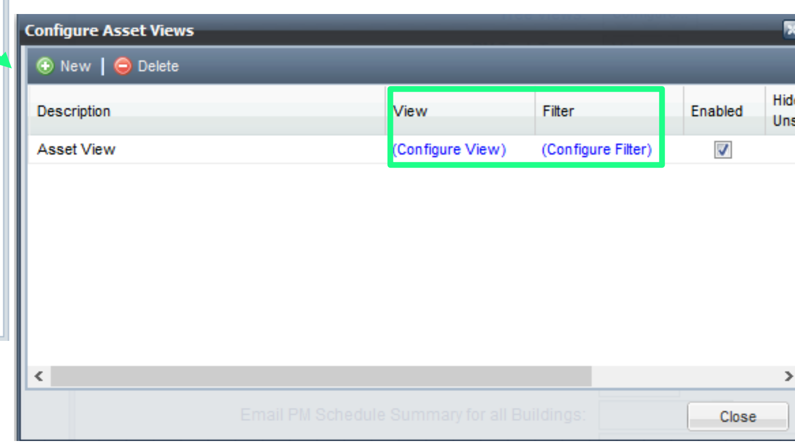
AssetPlanner

Company Settings – PM Module

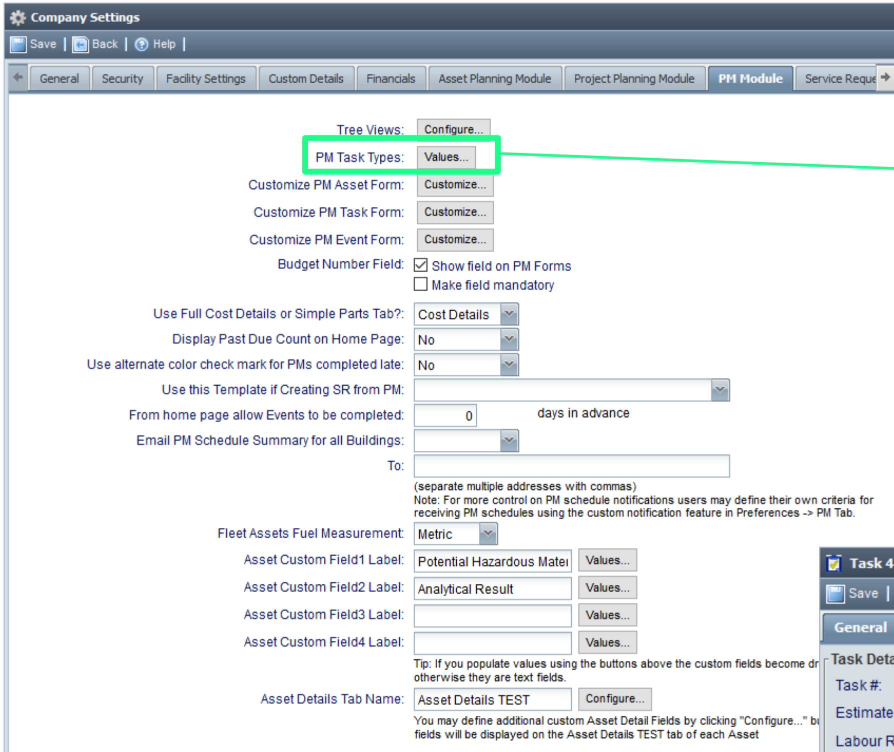
1. Tree View: Set default view for the Site/Asset Group tab shown on the bottom left screen. Add or delete a view that you would like to appear on the drop down list as well as configure the view and filter.

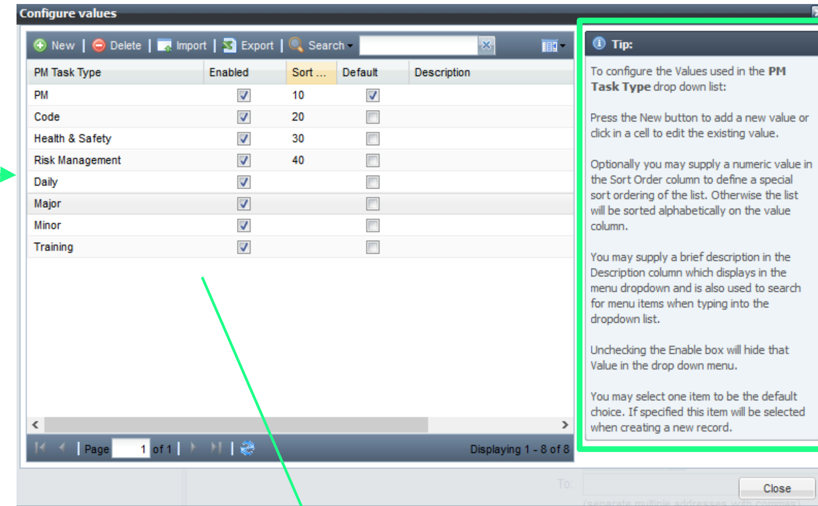


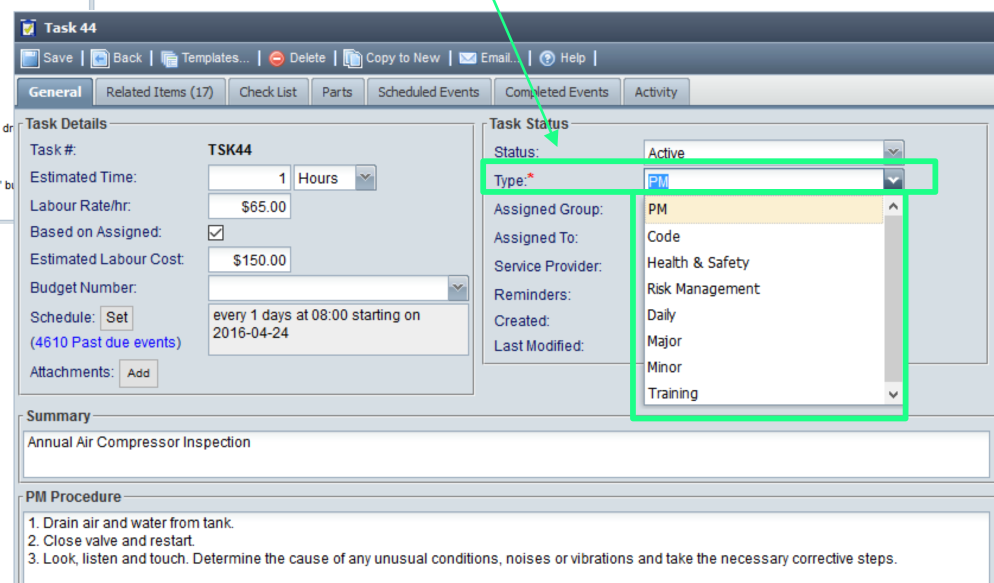




Company Settings – PM Module





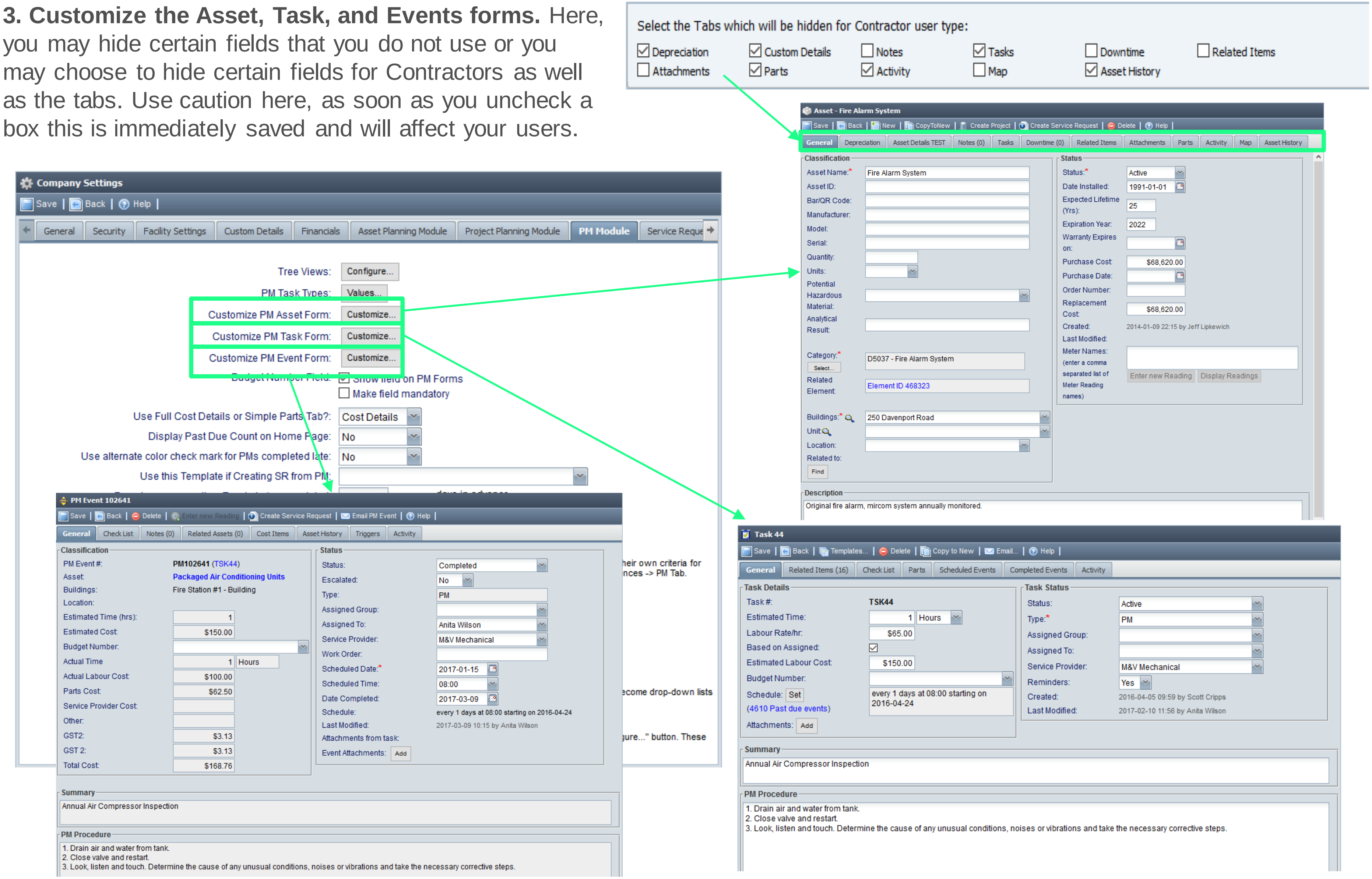


2. PM Task Types: Add or remove value on the PM Task Type drop down list.

**See tip section on the right side of the configure value window.*

Company Settings – PM Module

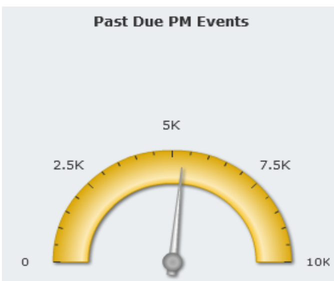
3. Customize the Asset, Task, and Events forms. Here, you may hide certain fields that you do not use or you may choose to hide certain fields for Contractors as well as the tabs. Use caution here, as soon as you uncheck a box this is immediately saved and will affect your users.



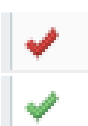
Company Settings – PM Module

4. Budget number field: Check or uncheck the box to enable the Budget Number field set up on the financials tab to appear on the Task Form and Event Form.

5. Select from the dropdowns:
a. Use the Full Cost Details or Simple Parts Tab
b. Display Past Due Count on the Home Page



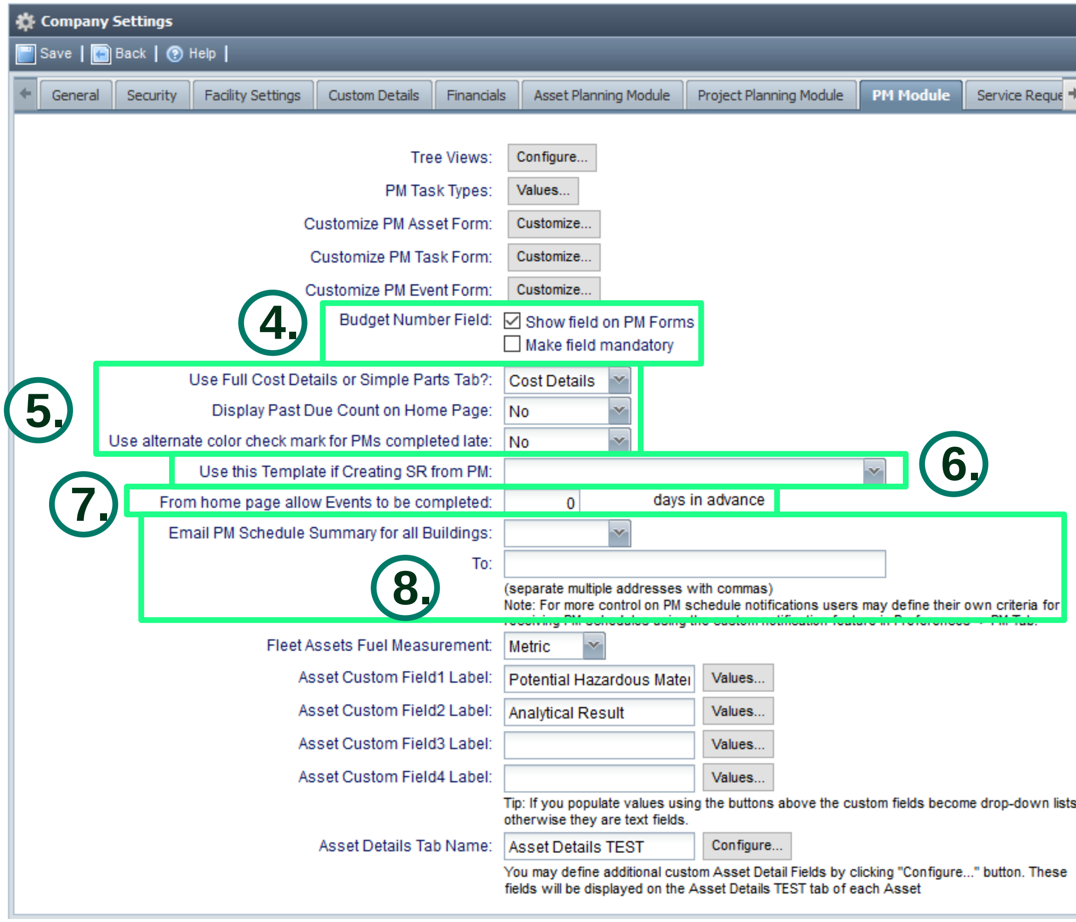
c. Use alternate color check mark for PMs completed late.



Red – PM is Completed **after** the Schedule Date
Green – PM is Completed **on or before** the Schedule Date

6. Use this Template if Creating SR from PM: Select what SR template to use if creating SR from PM.

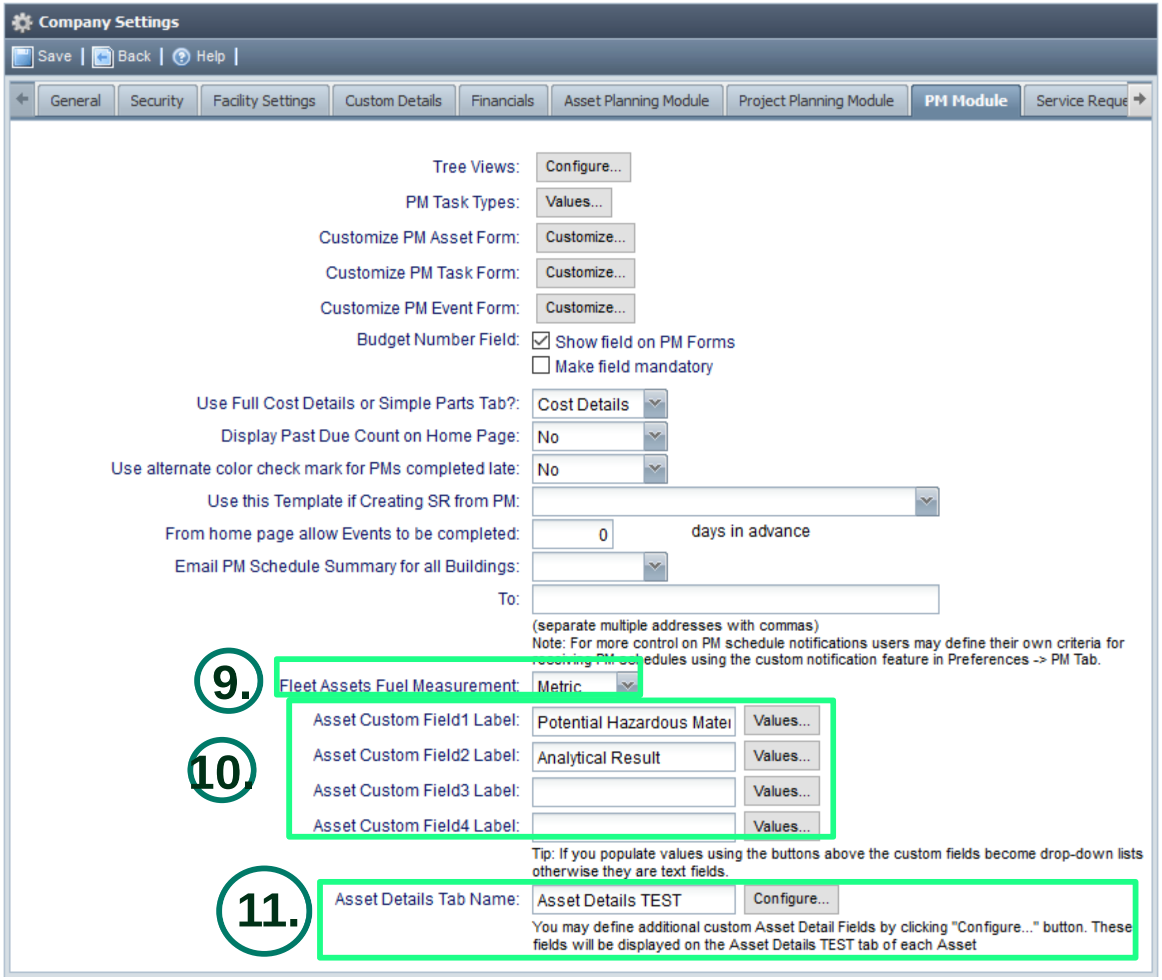
7. From home page allow Events to be completed: Set how many days in advance you will allow the users to complete the PM Event from the Home Page.



8. Email PM Schedule Summary for all Buildings: Select how often you would like the PM Schedule Summary to be emailed to the email address you entered. Use comma if adding multiple email addresses.

- Never - Monthly - Weekly

Company Settings – PM Module



9. Fleet Assets Fuel Management: Indicate whether you wish to operate in metric or Imperial

10. There are four **custom fields** in the Asset form that you can use if need to add more information about the asset. Open the **Values** to add dropdown list otherwise the field will be a text field. Custom field will be placed on the left side of the General Tab.

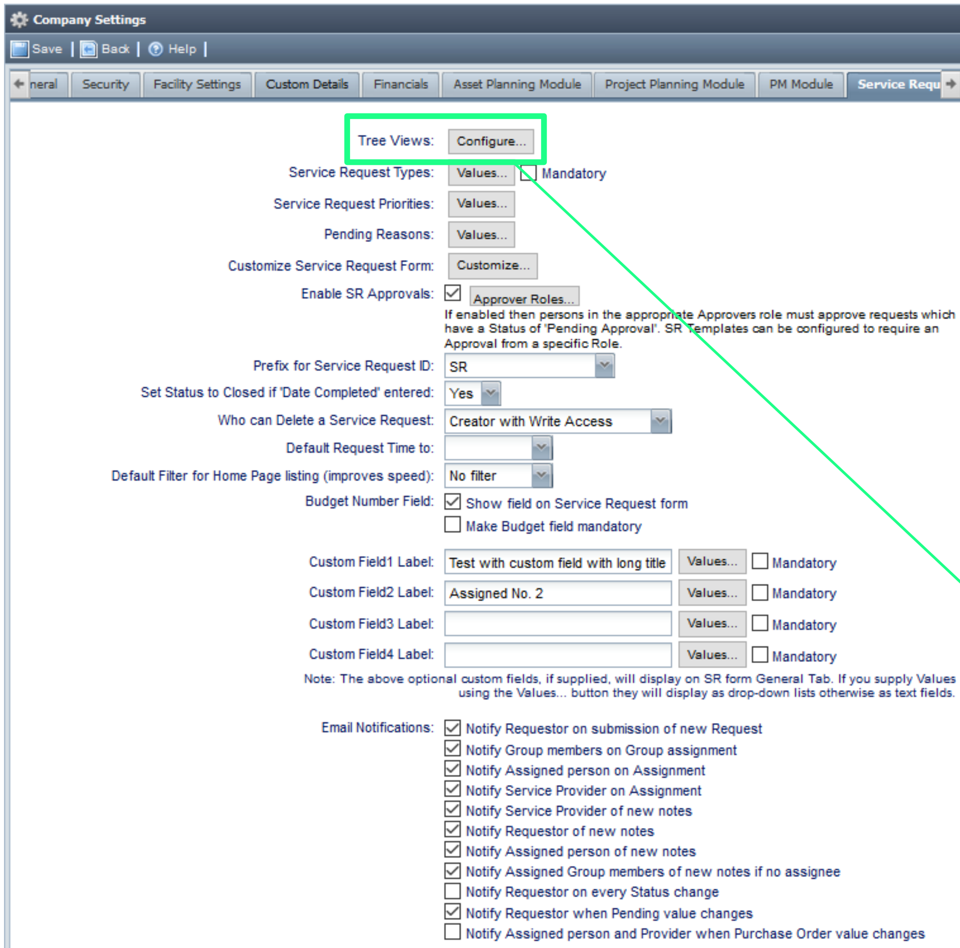
11. You may define additional custom **Asset Detail Tab** that will display on the Asset page. Use the **Configure** button to add the fields that you would like to be in the tab. You will have the option to set the fields as dropdown list or text field.

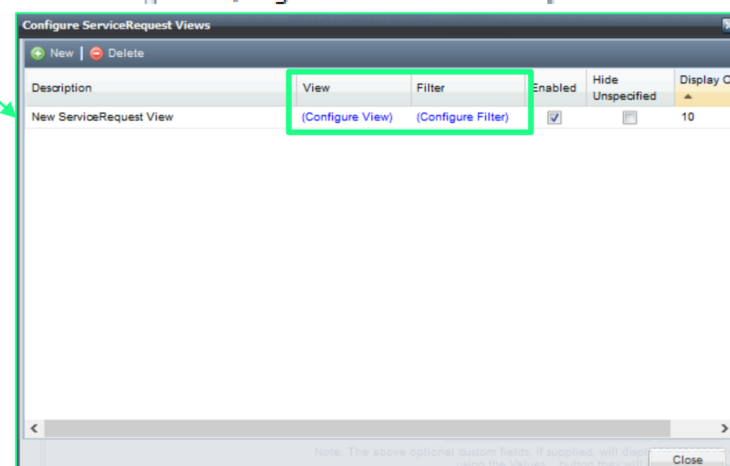
Service Request Module

AssetPlanner

Company Settings – Service Request

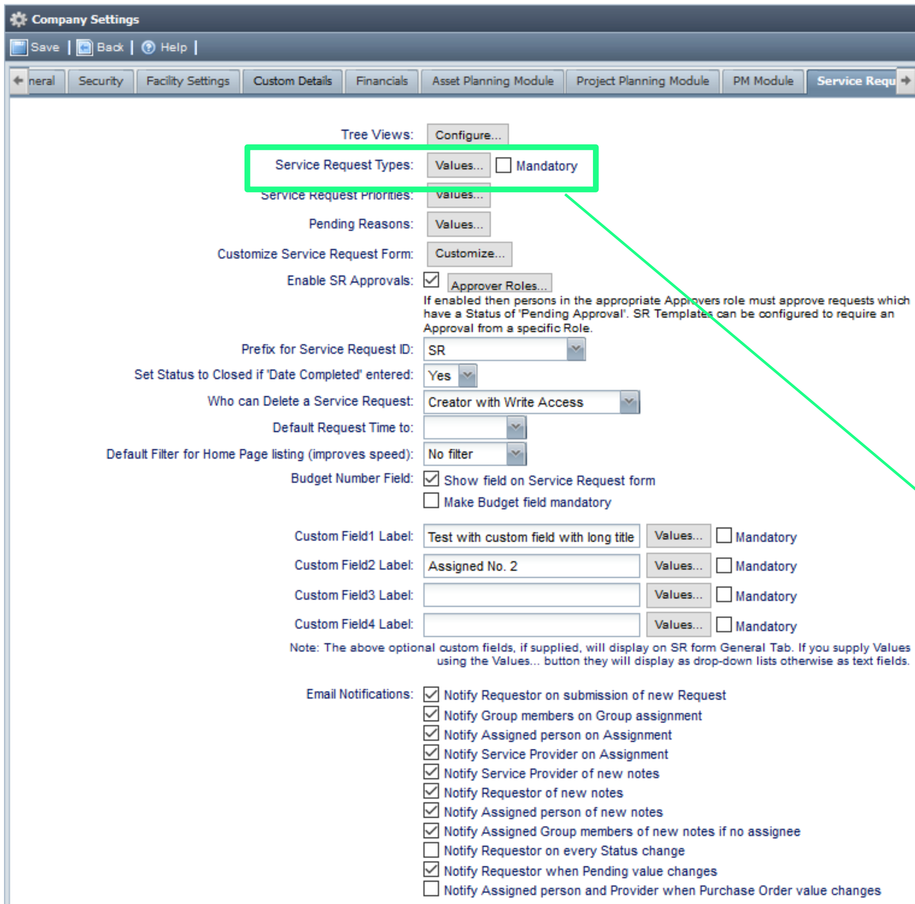
1. Tree View: Set default view for the Building/Service Request tab shown on the left screen. Add or delete a view that you would like to appear on the drop down list as well as configure the view and filter.

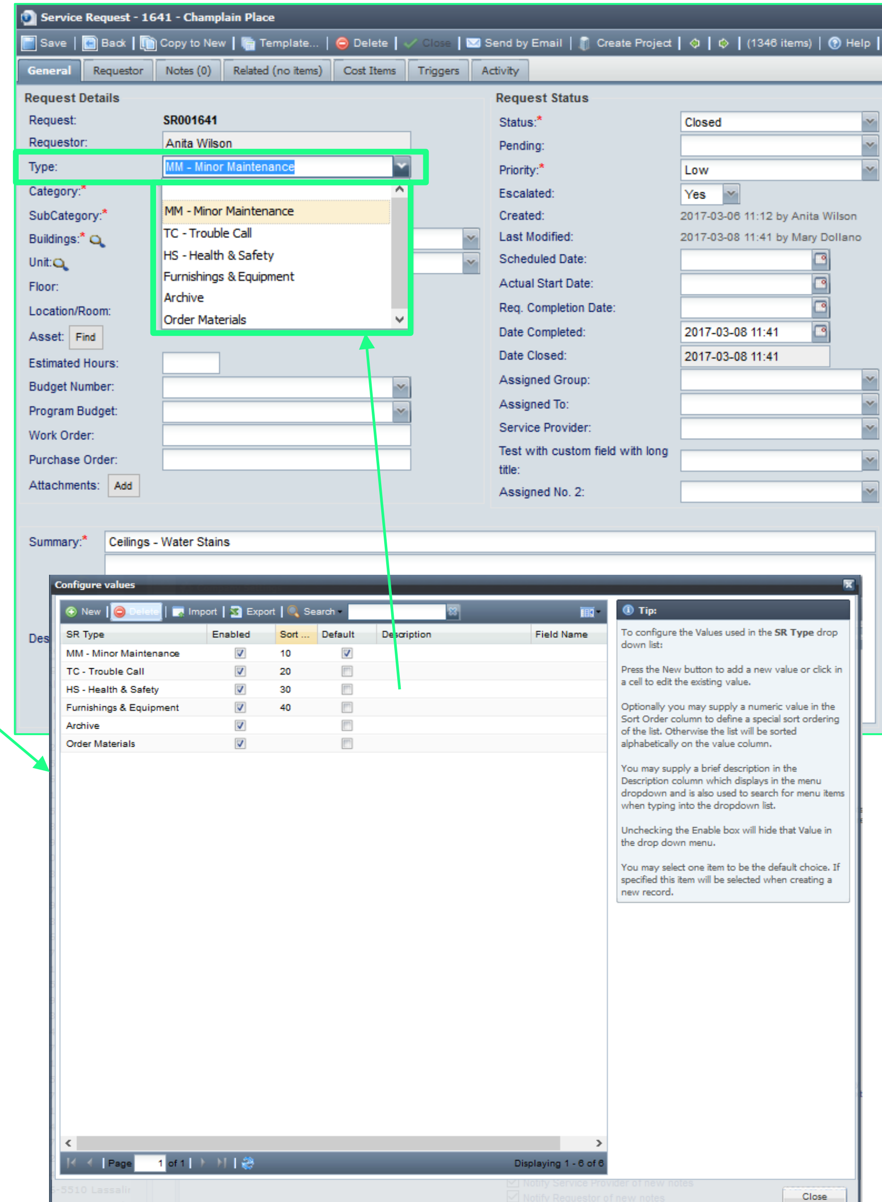




Company Settings – Service Request

2. Service Request Types: Set the values or descriptions to group the various service requests submitted. Add or remove value on the SR Type drop down list in the configure value window. Check the box beside the value to make this field Mandatory.

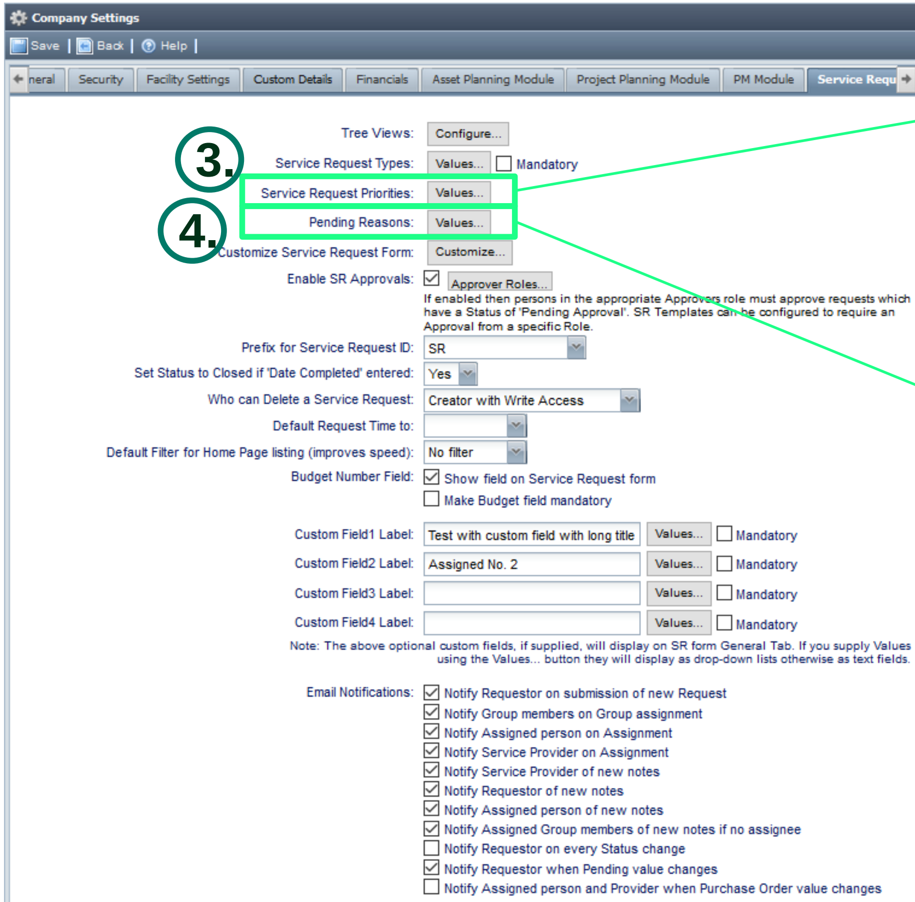


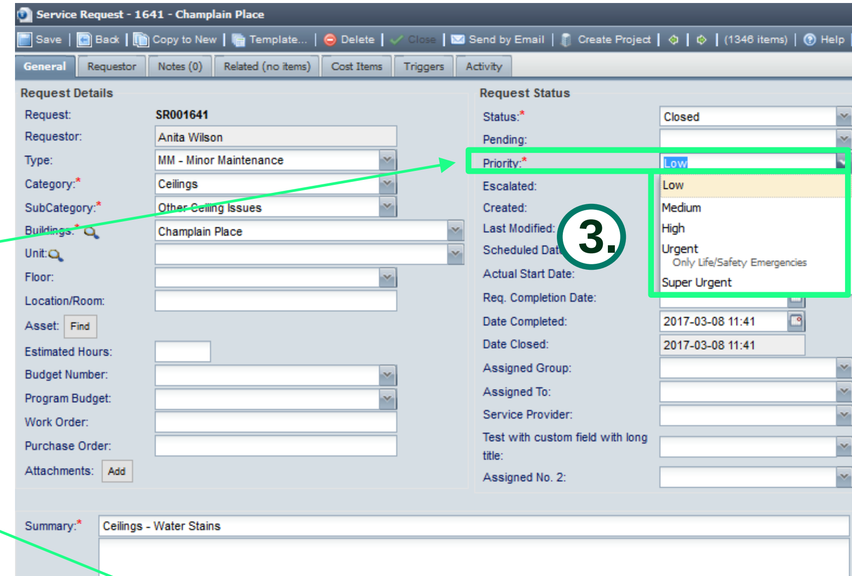


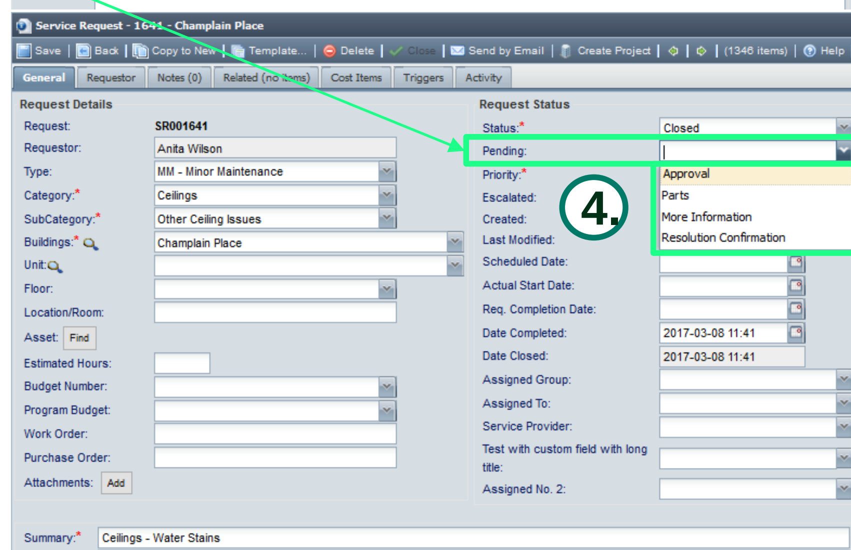
**See tip section on the right side of the configure value window.*

Company Settings – Service Request

3. Service Request Priorities: Set the value of urgency of the request.



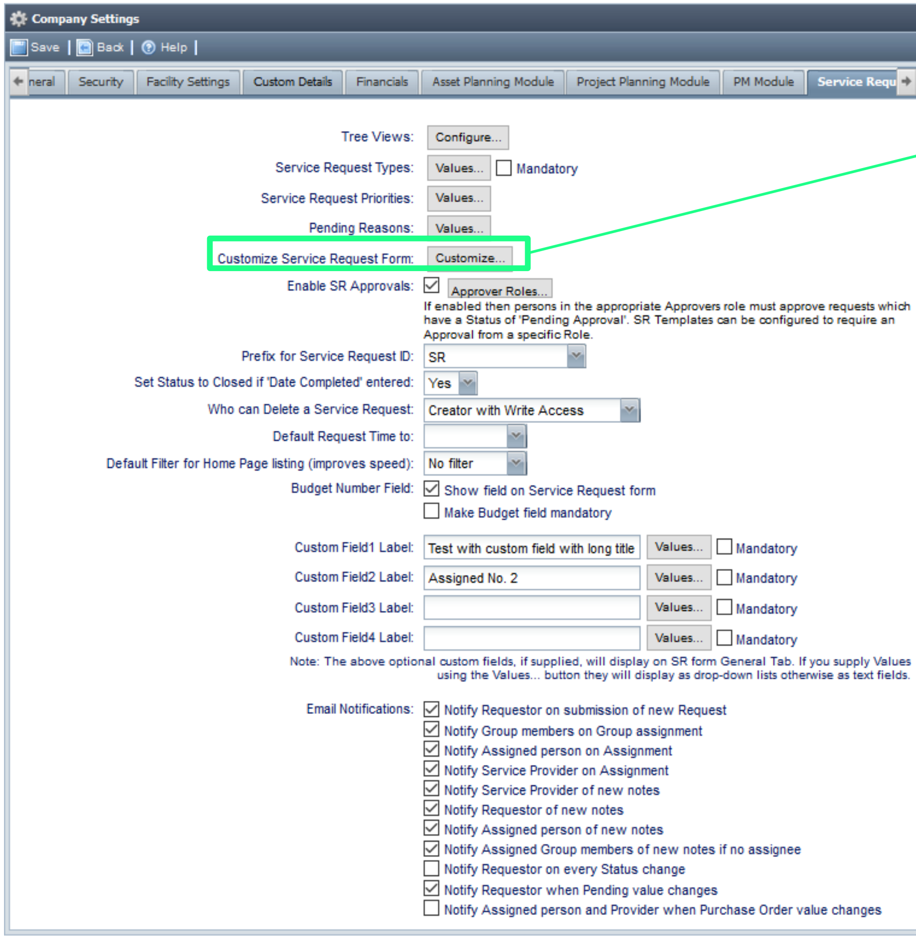


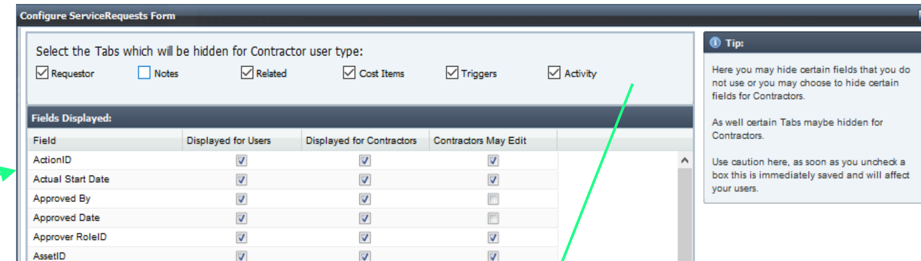


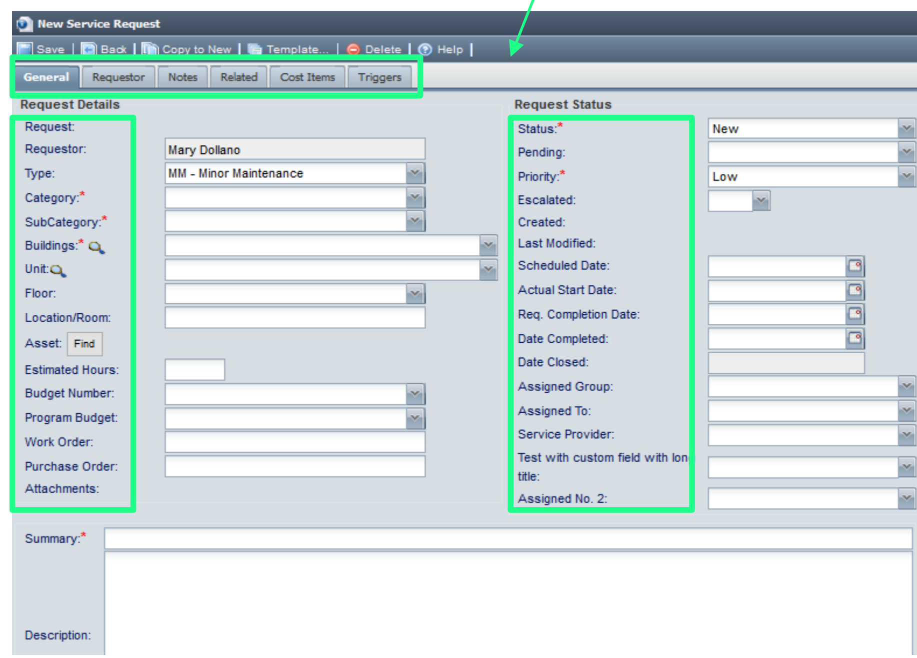
4. Pending Reasons: When Service Request status is Pending, indicate why is it pending by adding value to this field.

**See tip section on the right side of the configure value window.*

Company Settings – Service Request







5. Customize Service Request Form: Here you may hide certain **fields** that you do not use or you may choose to hide for Contractors as well as **tabs**. Use caution here, as soon as you uncheck a box this is immediately saved and will affect your users.

Company Settings – Service Request

6. Enable SR Approvals: Check the box to enable the feature and set the Approval Role. Only one Approver Role is required. Having multiple approver roles allows you to assign different roles to different templates or manually choose the role required to approve a request.

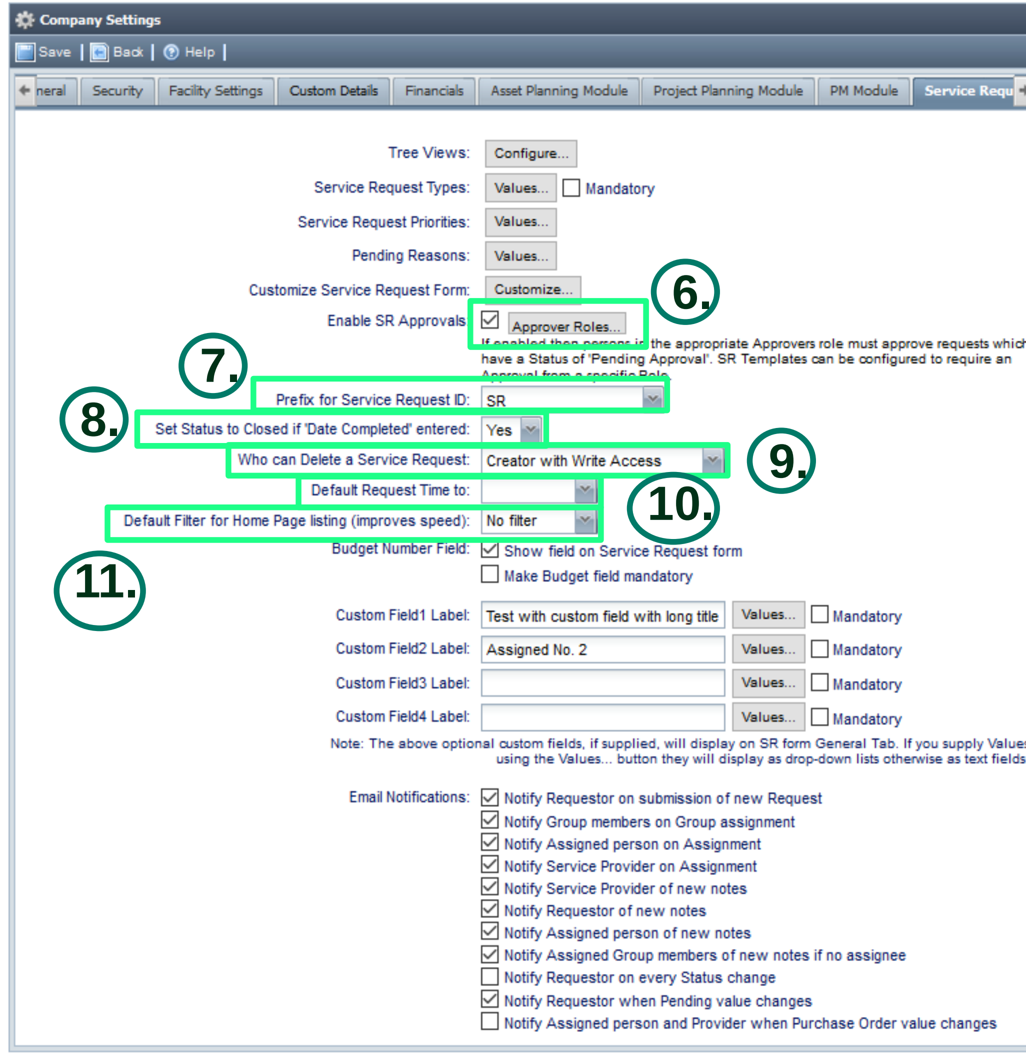
7. Prefix for Service Request ID: Select how you would like the SR ID to starts with.

8. Set Status to Closed if ‘Date Completed’ entered: Choose ‘No’ to have the option for the ‘Date Closed’ and ‘Date Completed’ to be unique.

9. Who can Delete a Service Request: Select who can delete either **Creator with Write Access** or **Admin Only**.

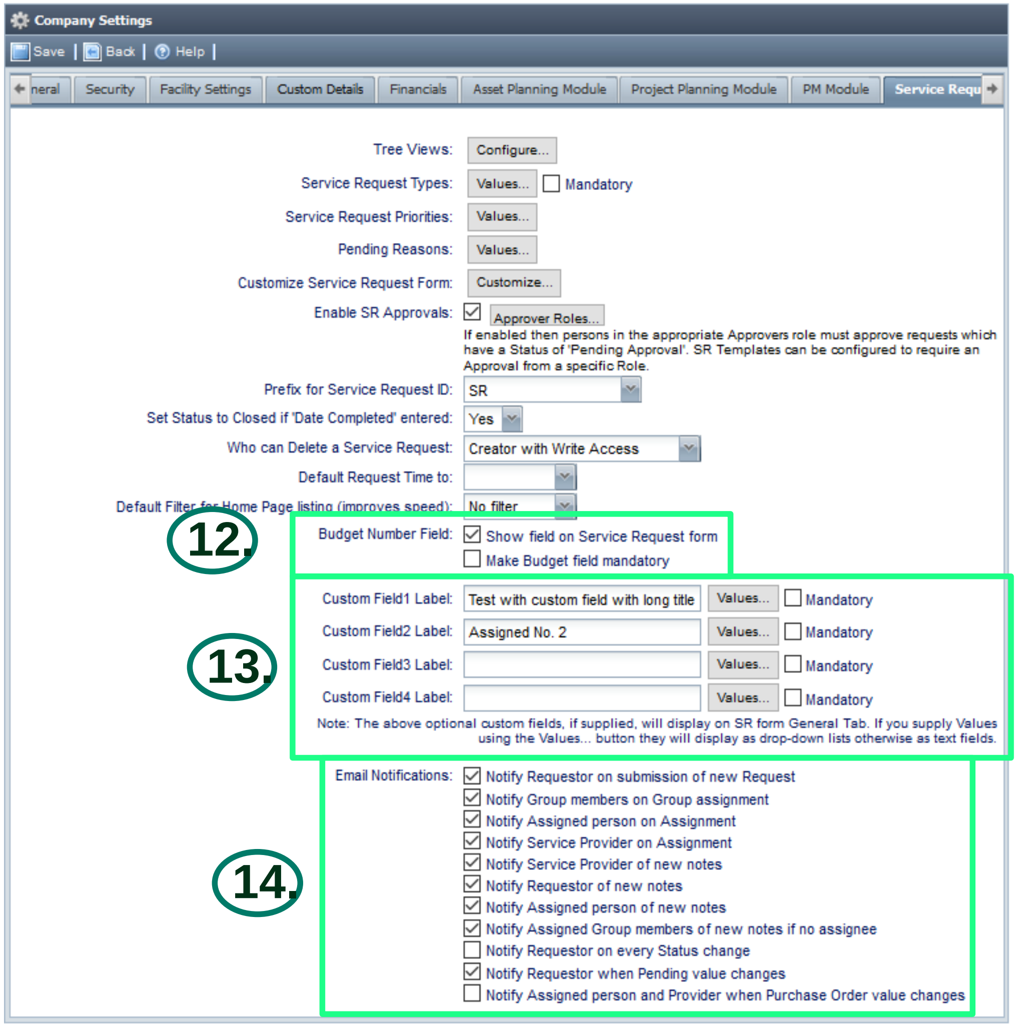
10. Default Request Time to: Leave this field blank if not preferred to have a request time filled in the SR.

11. Default filter for Home Page listing (improves speed): Once you have accumulated several years worth of data in the database, you can choose how many years worth of data you want available from the home dashboard. **



** Note: All data is available from the reports and queries options. One can choose to not have it all loaded to the home page to speed up the opening of the home dashboard

Company Settings – Service Request



12. Budget number field: Check or uncheck the box to enable the Budget Number field set up on the financials tab to appear on the Service Request Form

13. There are four **custom fields** in the Service Request form that you can use if need to add more information about the request. Open the **Values** to add dropdown list otherwise the field will be a text field. Custom field will be placed on the left side of the General Tab.

14. Email Notifications: Check or uncheck the boxes to turn on the notifications.

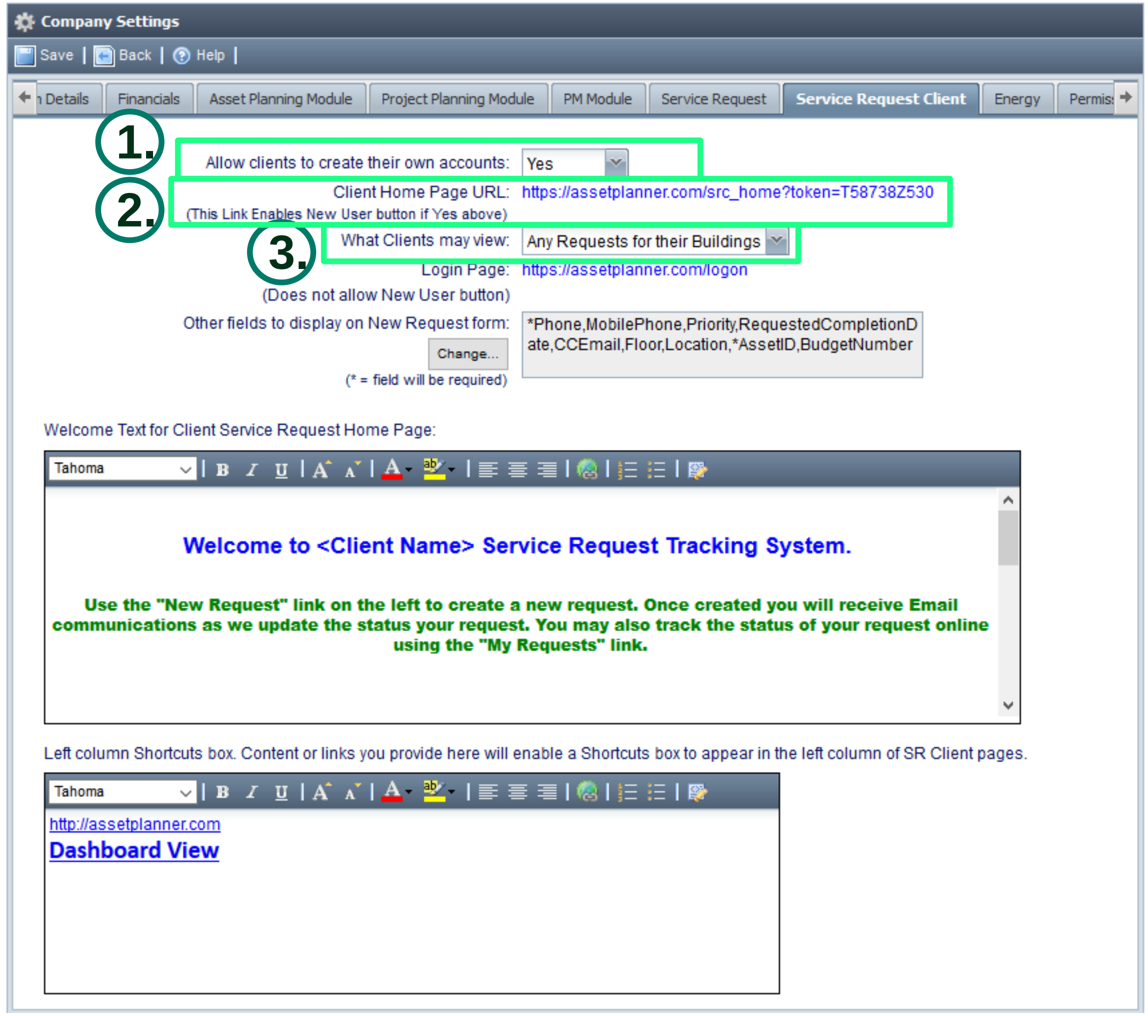
Service Request Client Module

Company Settings – Service Request Client

1. Allow clients to create their own accounts: If set to Yes and the client has been given the special URL to your company's Client Service Request home page, then they may use the 'New User' button on the AssetPlanner™ login page to create a Service Request account in order to submit Service Requests. If the value is set to No, then you must create Service Request accounts for your clients before they are able to create or to check the status of a service request.

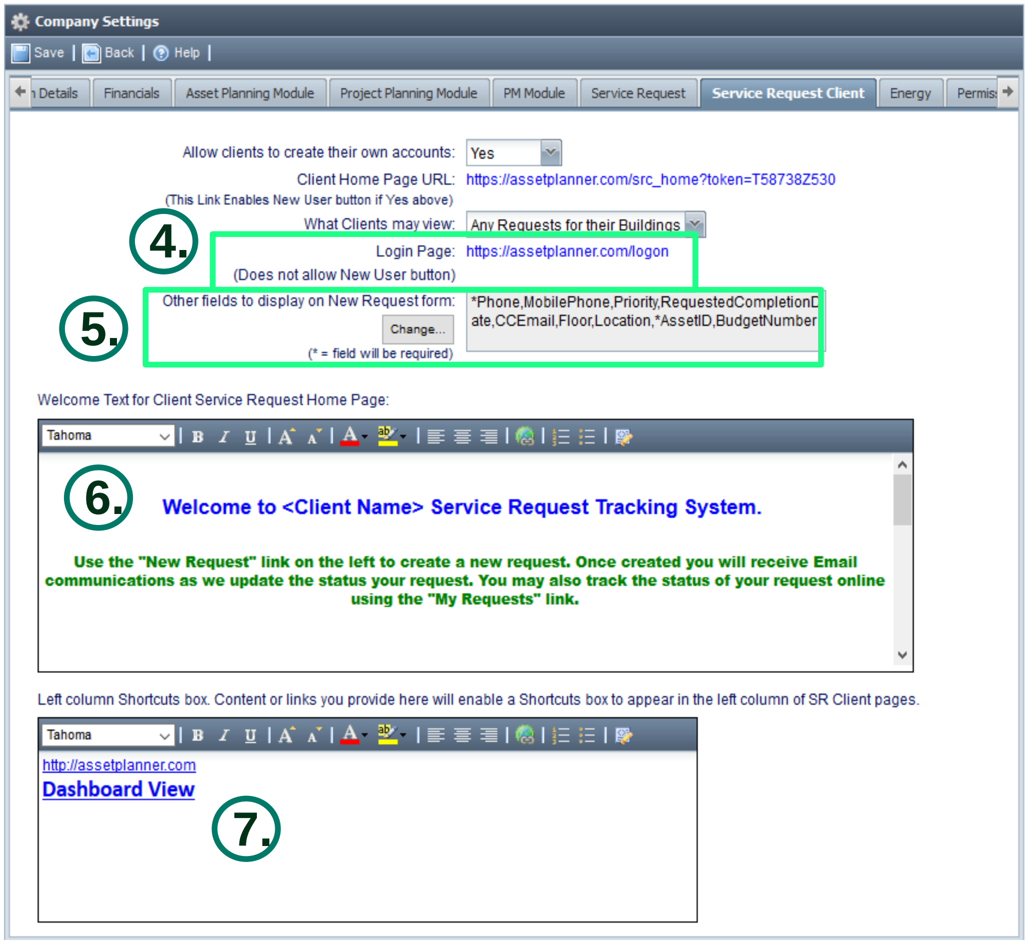
2. Client Home Page: This URL is specific to your Companies database. Using this URL clients will see your Company Names and logo at the AssetPlanner™ login page and will be able to use the New User button to create an account (if permitted above)

3. What Clients may view: You may allow clients that have Service Request Accounts, either to view ***All Service Request*, *Only their own Service Requests, Any Service Request for their Building or Only Service Requests for their Building*** using the Service Request Client page.



**Note: for the Settings 'Only their own Building', the client will not be allowed to modify their profile and change the facility once initially set. Only an Administrator is able to change their Building in this configuration. Administrator's can also grant Service Request clients access to more facilities by modifying the User account and altering the list of Buildings against their account. This list of buildings a Service Request client may view will only display on the users account if you have set 'Only their own Building' setting on this page.*

Company Settings – Service Request Client



4. Login Page: Provide this link, if you do not want the New User button to be enabled.
Tip: If you have enabled the ability for clients to create their own Service Request account, but you do not want all your clients to have this ability, you can email the first link to the users that you wish to create accounts and still safely post the AssetPlanner™ Logon page link on your intranet sites for all users.

5. Other fields to display on New Request form: Choose the fields to display to Service Request Clients when submitting new Requests. Click the Change button to enable a field and specify if it is mandatory or not.

6. Welcome Text: This field may allow you to customize the welcome text that your client will see when they visit the Client Service Request home page. You may enter raw HTML information inside the for box for formatting or links to other locations.

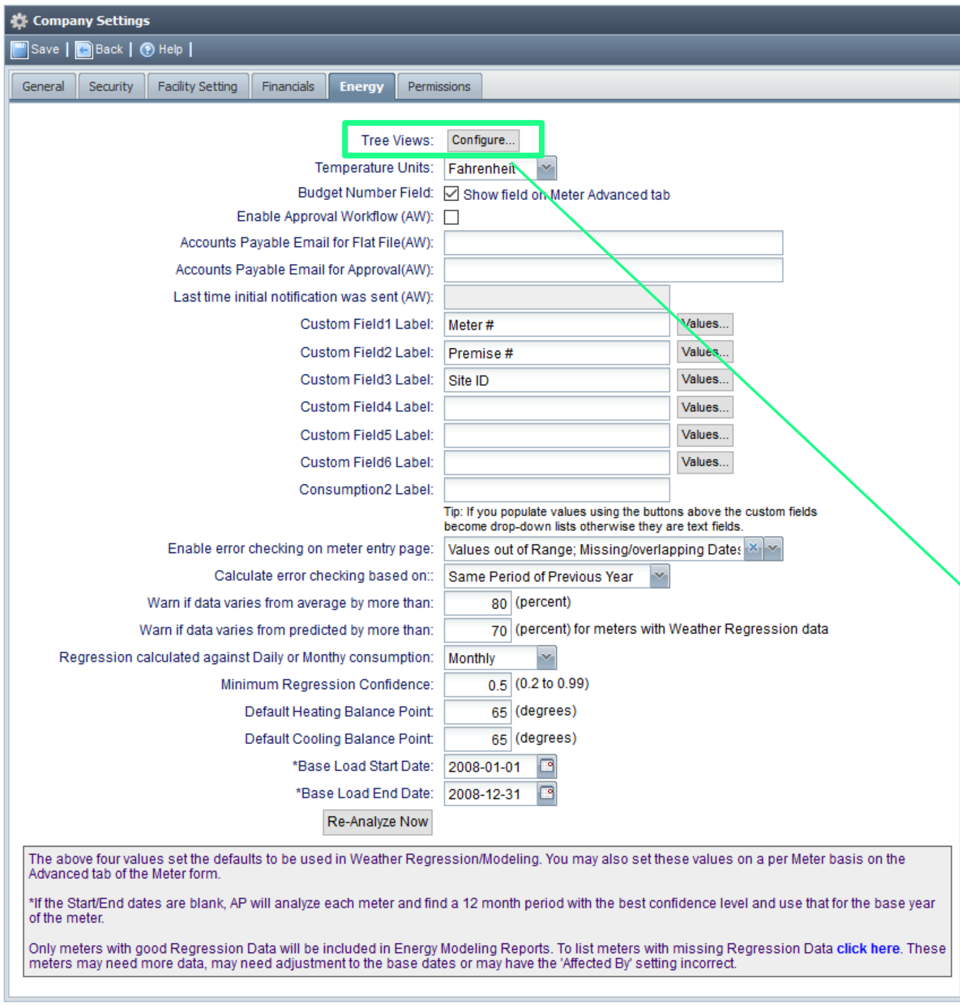
7. Shortcut Box: This field allows you to provide shortcuts or URL link to other websites frequently used by your database client users. The links will appear on the left hand side of the service request client homepage.

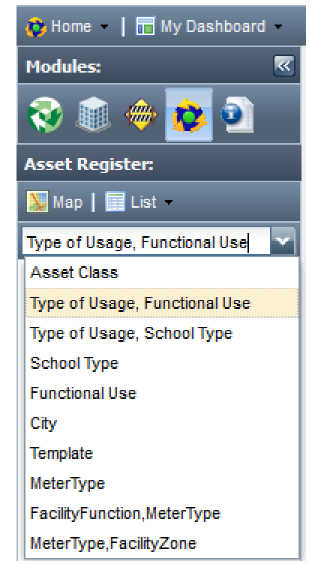
Energy & Sustainability Module

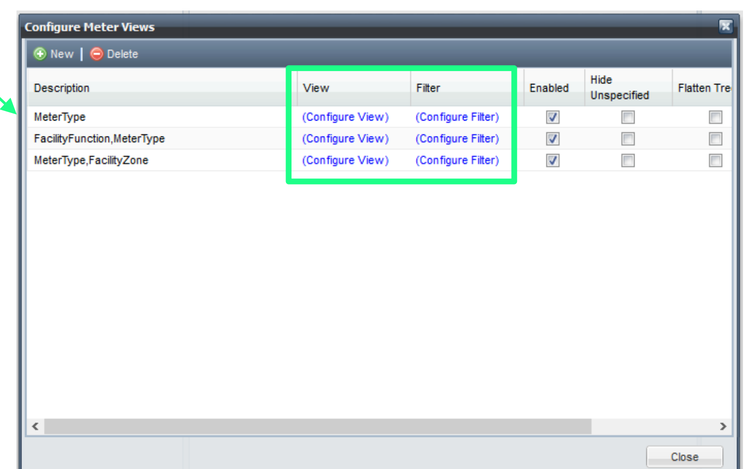
Confidential & Proprietary

Company Settings – Energy

1. Tree View: Set default view for the Building/Service Request tab shown on the left screen. Add or delete a view that you would like to appear on the drop down list as well as configure the view and filter.

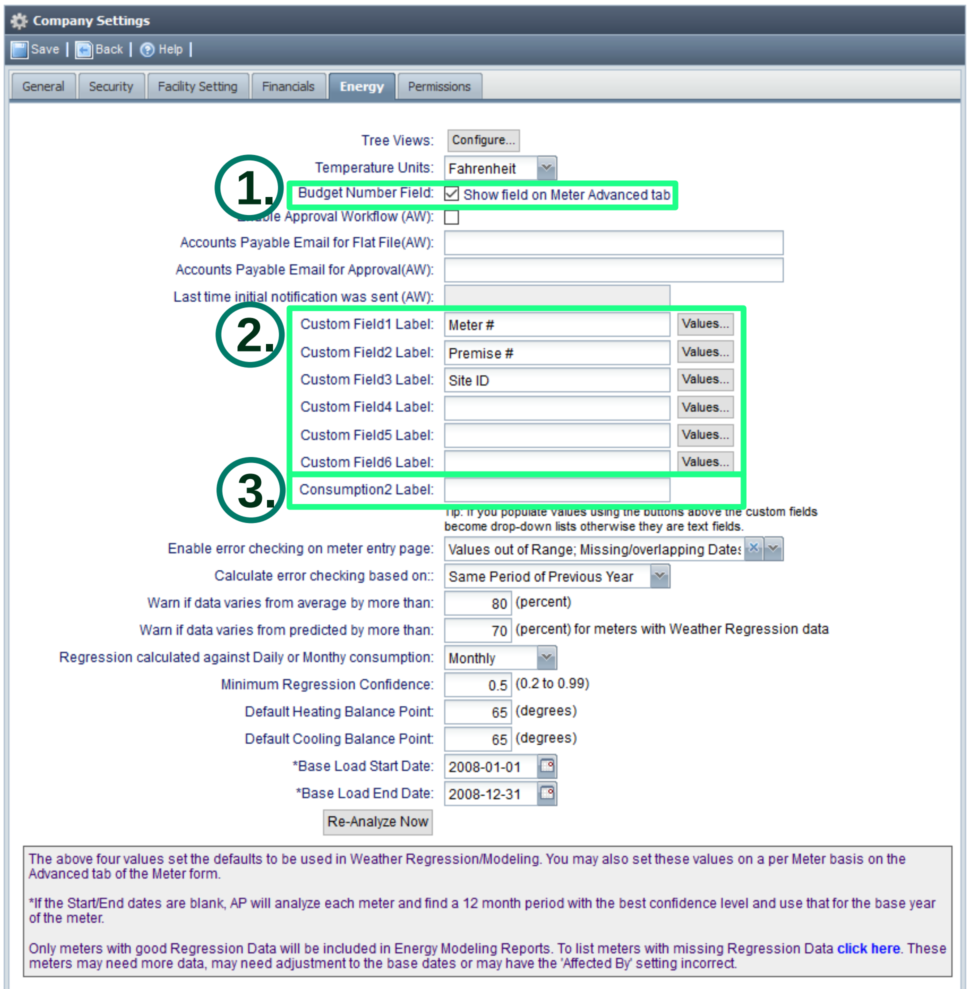






Company Settings – Energy

1. Budget Number Field: Configuration for the budget number field is on the Financials tab. This checkbox add this field to the advanced settings tab of each of your utility meters so that you can relate a budget number to each meter.

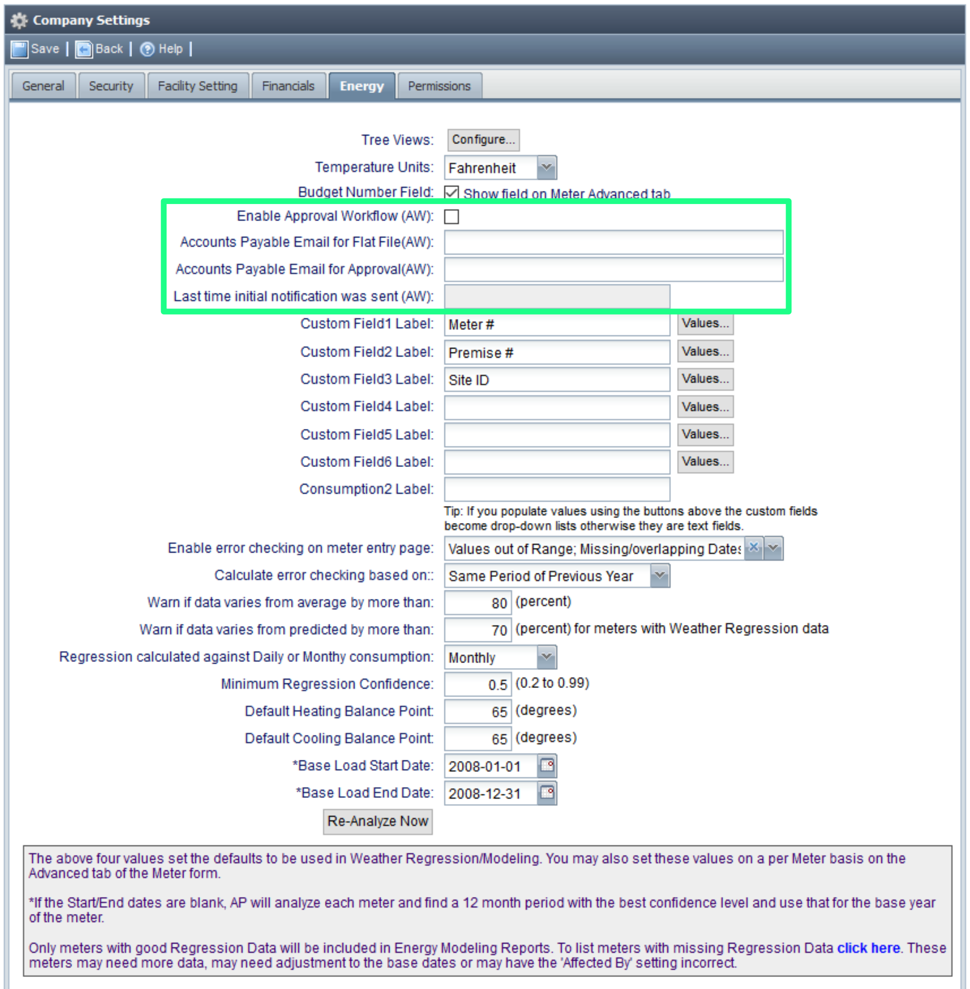


2. Custom Field Label 1-6: The first 3 of these fields show up as part of the Meter Details on the Meter tab. The next 3 show up on the Advanced Settings tab of the meter. If you populate values for these custom fields they become drop-down lists otherwise they are text fields. Clients often use these to store additional meter information (Meter #, Premise #, Site ID etc.).

3. Consumption2 Label: If you add a value to this field Consumption 2 will be renamed throughout the system with the label provided.

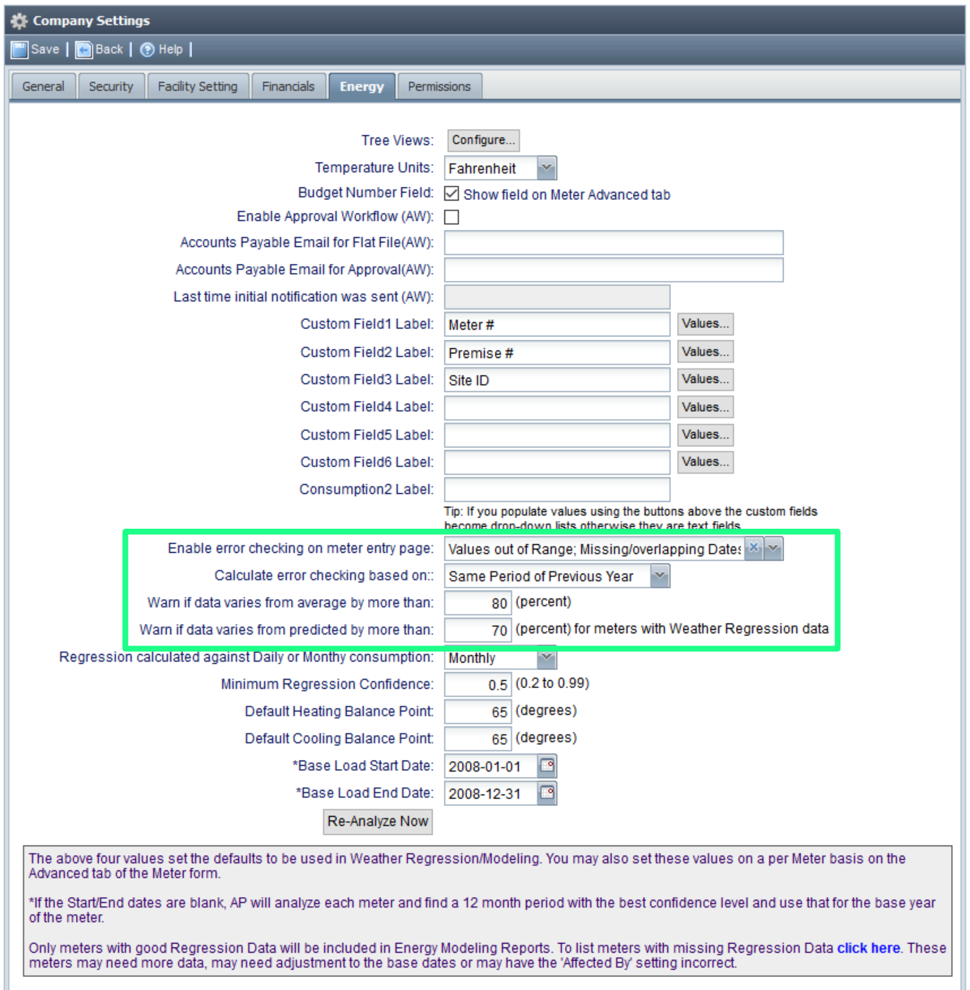
Company Settings – Energy

1. Approval Workflow: These settings are specific to clients who have set-up an approval system where invoice data is regularly uploaded to Asset Planner. Users approve the invoices that should be paid. A flat file is sent to the accounts payable department containing the approved invoices.



Company Settings – Energy

1. Enable error checking on meter entry page: If enabled this setting will highlight out of range and or missing/overlapping data red on the meter page.



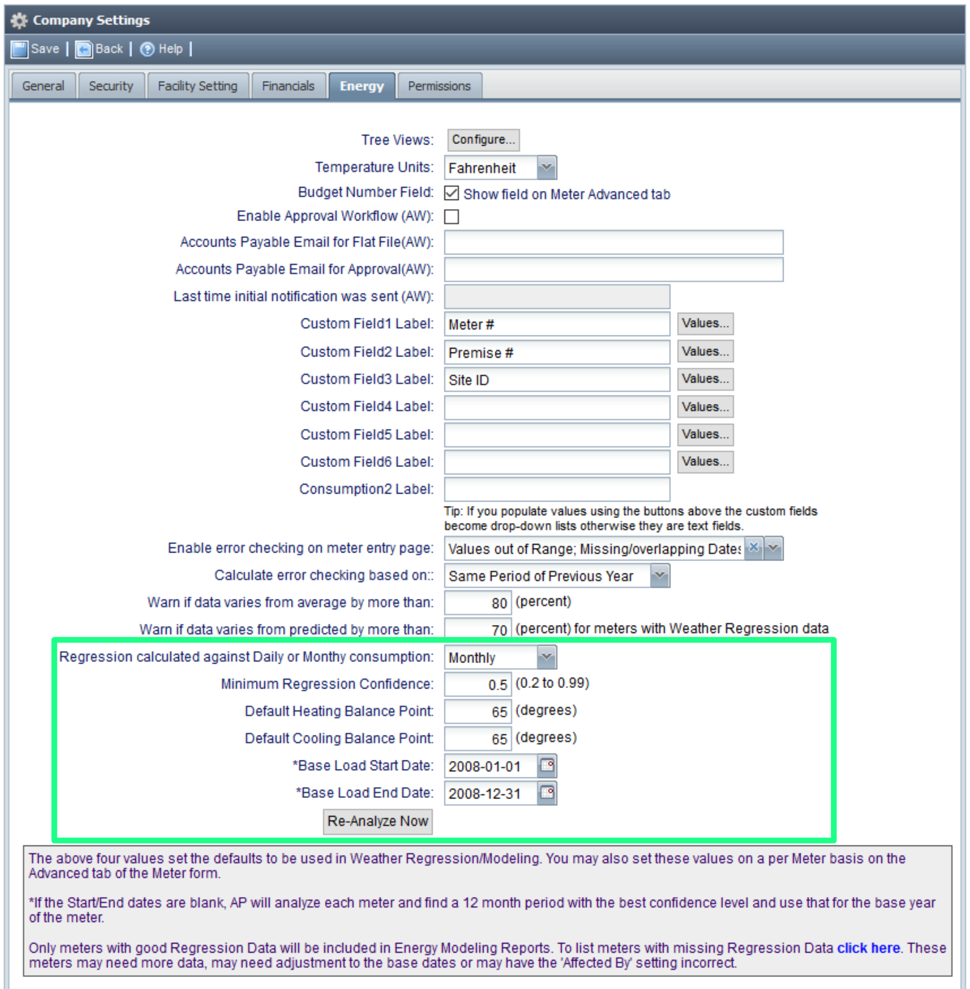
2. Calculate error checking based on: Errors related to out of range values can either be calculated based on the same period for the previous year or the average of the past 60, 90 or 180 days.

3. Warn if data varies from average by more than: If utility meter readings vary by more than the percent specified warnings will be created based on the settings above.

4. Warn if data varies from predicted by more than: If regression analysis is configured for a meter and the predicted data varies by more than the percent specified from the actual data warnings will be created.

Company Settings – Energy

Regression analysis is used to analyze the relationship between utility consumption/costs and weather. This is a useful reporting tool for meters where the utility consumption and costs have a strong correlation to changes in the outdoor temperature.



2. Minimum Confidence Interval: The confidence interval is a measure of how good the correlation is between the utility data and weather, the closer this value is to 1, the better. A value of 0.65 or higher shows a reasonable level of correlation.

3. Default Heating/Cooling Balance Points: The balance point temperature occurs when the outdoor temperature is equal to temperature inside a facility.

4. Base Load Start/End Date: You can either specify a specific base year for all meters or leave these fields blank and AssetPlanner will find the base year with the highest confidence interval.