

Administrator Configuration Settings for *AssetPlanner*TM



Configure Company Settings



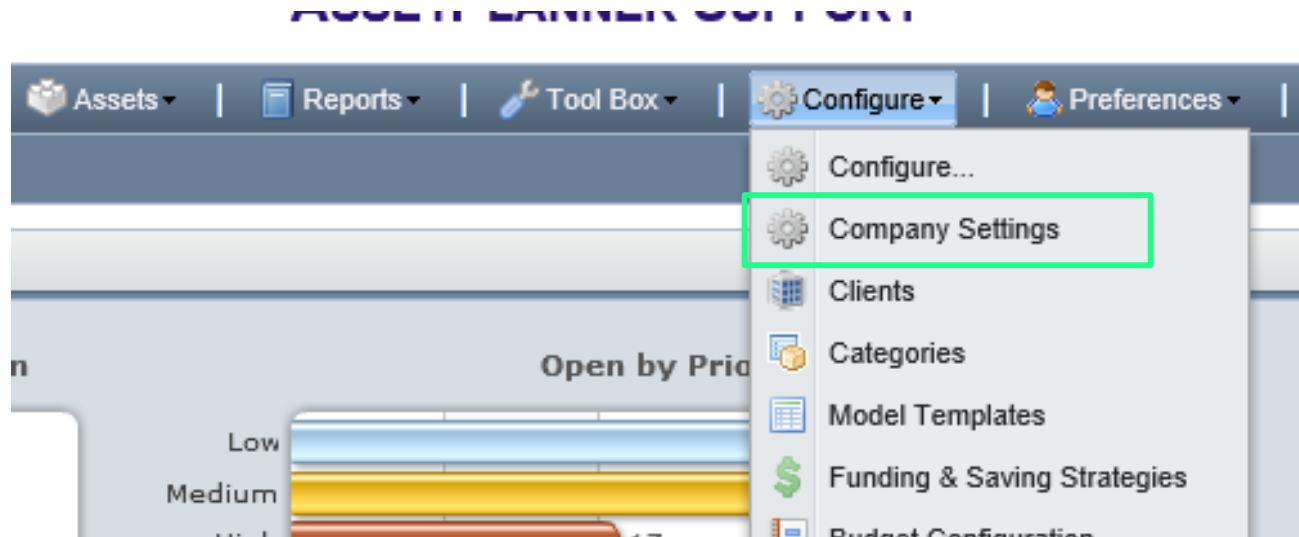
Configure – Company Settings

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.

The screenshot shows the 'Company Settings' application window with the 'General' tab selected. The interface includes a top navigation bar with tabs for 'General', 'Security', 'Facility Settings', 'Custom Data', 'Financials', 'Asset Planning Module', 'Project Planning Module', 'PM Module', and 'Service Request'. The main content area contains several form fields and options, each highlighted with a green box and a numbered callout:

- 1.** 'Company or Organization name:*' text input field containing '04 - Z - SAMPLE'.
- 2.** 'Company Logo:' text input field with an '(upload logo)' link.
- 3.** 'Display in Page Header:' dropdown menu set to 'Company Name and Logo'.
- 4.** 'Measurement:' dropdown menu set to 'Metric'.
- 4.** 'Languages Enabled:' dropdown menu set to 'English'.
- 4.** 'Region:' dropdown menu set to 'Canadian'.
- 5.** 'Administrator Name:*' text input field containing 'Sales Team'.
- 5.** 'Administrator Phone:*' text input field containing '403-467-3263'.
- 5.** 'Administrator Email:*' text input field containing 'salesteam@fameassets.com'.
- 6.** 'Tool Box Shared Documents:' dropdown menu set to 'Anyone may Upload'.
- 7.** 'Track Users Geo Location' checkbox, which is currently unchecked. Below it is a note: '(Enabling this will ask user the first time to permit their location to be tracked. If available, location data is stored in the activity tab of various forms.)'
- 8.** A large text area for a 'Customized Administrator contact information message (displayed on logon page when user account is disabled)'. The area is currently empty.

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

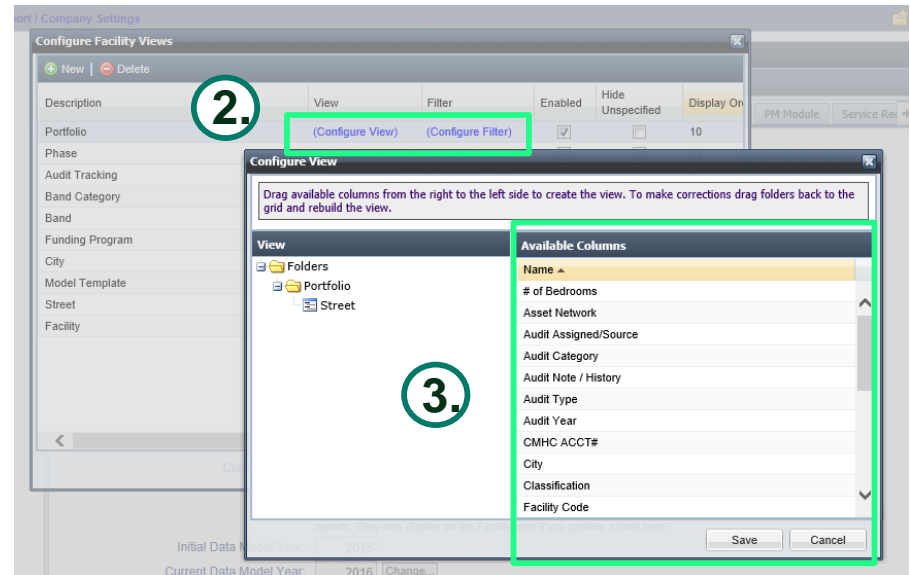
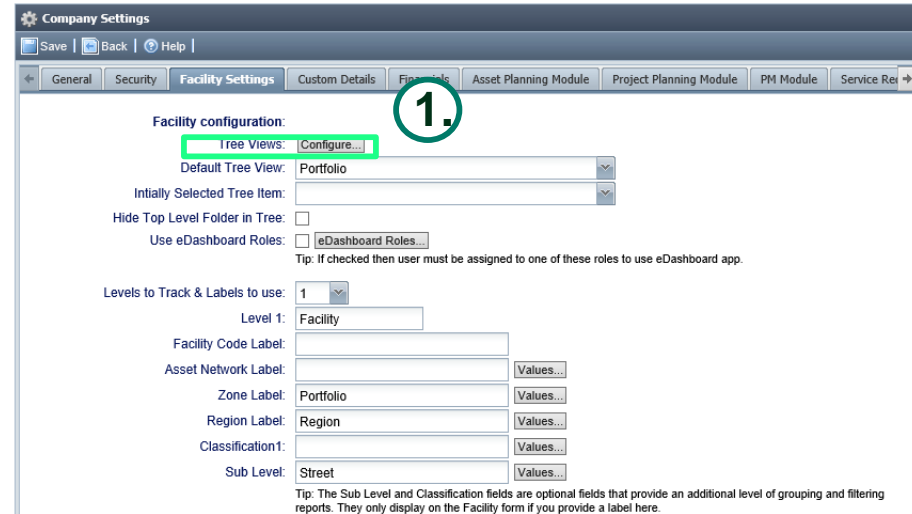
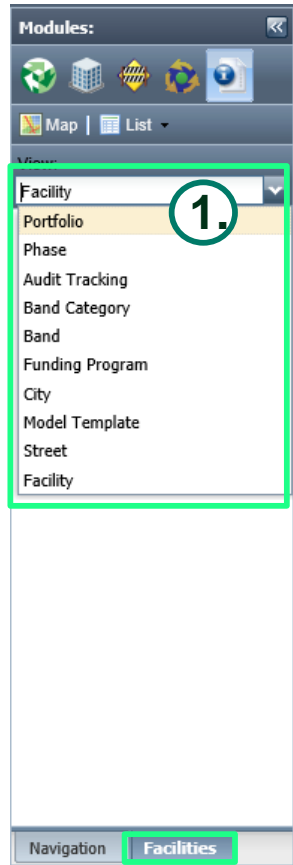
The database provides an opportunity to create various database structures or groupings when displaying or viewing the data

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."

Company Settings

Save | Back | Help |

General | Security | **Facility Settings** | Custom Details | Financials | Asset Planning Module | Project Planning Module | PM Module | Service Re →

Facility configuration:

Tree Views: **1.**

Default Tree View: Portfolio **2.**

Initially Selected Tree Item: **3.**

Hide Top Level Folder in Tree:

Use eDashboard Roles:

Tip: If checked then user must be assigned to one of these roles to use eDashboard app.

Levels to Track & Labels to use: 1

Level 1: Facility

Facility Code Label:

Asset Network Label:

Zone Label: Portfolio

Region Label: Region

Classification1:

Sub Level: Street

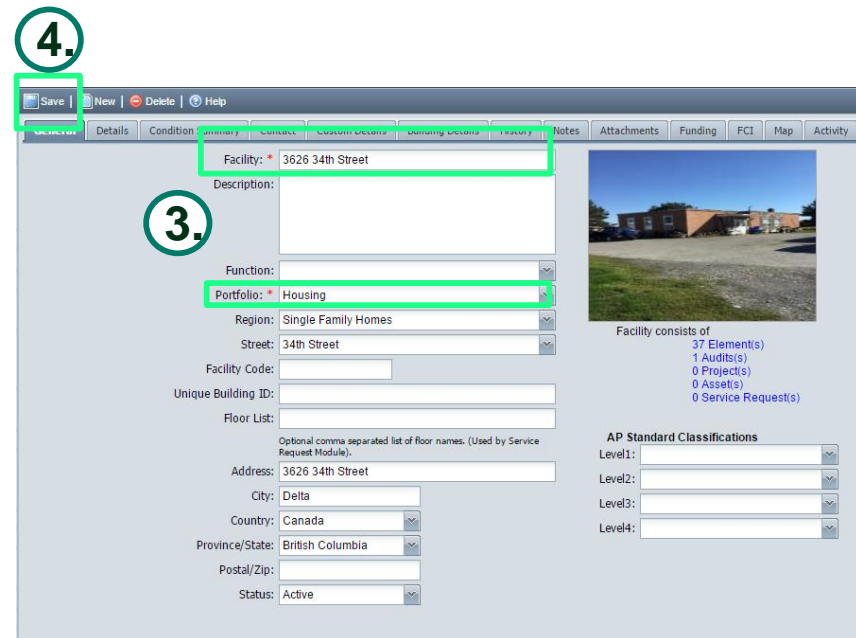
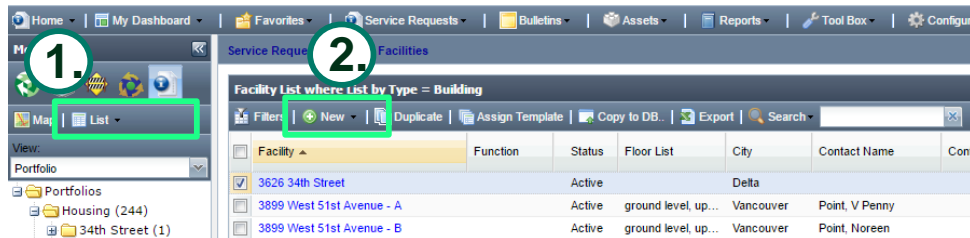
Tip: The Sub Level and Classification fields are optional fields that provide an additional level of grouping and filtering reports. They only display on the Facility form if you provide a label here.

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 the 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 Inactive. 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...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	<input type="checkbox"/>	<input type="checkbox"/>	
Funding Codes	Drop down (Multi...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2	<input type="checkbox"/>	<input type="checkbox"/>	
Funding #	Text field	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	3	<input type="checkbox"/>	<input type="checkbox"/>	
Classification	Drop down: Conf...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	
Classification...	Large Text field	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	4	<input type="checkbox"/>	<input type="checkbox"/>	
Phase/Constru...	Drop down: Conf...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	5	<input type="checkbox"/>	<input type="checkbox"/>	
Lot #	Text field	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	6	<input type="checkbox"/>	<input type="checkbox"/>	
CMHC ACCT#	Text field	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	7	<input type="checkbox"/>	<input type="checkbox"/>	
Low Income	Drop down: Conf...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	8	<input type="checkbox"/>	<input type="checkbox"/>	
# of Bedrooms	Drop down: Conf...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	9	<input type="checkbox"/>	<input type="checkbox"/>	
Audit Type	Drop down: Conf...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12	<input type="checkbox"/>	<input type="checkbox"/>	
Audit Year	Drop down: Conf...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	13	<input type="checkbox"/>	<input type="checkbox"/>	
Audit Category	Drop down: Conf...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	14	<input type="checkbox"/>	<input type="checkbox"/>	
Audit Assigned...	Drop down: Conf...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	15	<input type="checkbox"/>	<input type="checkbox"/>	
Other Audit Type	Text field	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	16	<input type="checkbox"/>	<input type="checkbox"/>	

PM Module



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
Save | Back | Help

General | Security | Facility Settings | Custom Details | Financials | Asset Planning Module | Project Planning Module | **PM Module** | Service Request

Tree Views: **Configure...**

PM Task Types: Values...

Customize PM Asset Form: Customize...

Customize PM Task Form: Customize...

Customize PM Event Form: Customize...

Budget Number Field: Show field on PM Forms
 Make field mandatory

Use Full Cost Details or Simple Parts Tab?: Cost Details

Display Past Due Count on Home Page: No

Use alternate color check mark for PMs completed late: No

Use this Template if Creating SR from PM: [Dropdown]

From home page allow Events to be completed: 0 days in advance

Email PM Schedule Summary for all Buildings: [Dropdown]
To: [Text Field]

(separate multiple addresses with commas)
Note: For more control on PM schedule notifications users may define their own criteria for receiving PM schedules using the custom notification feature in Preferences -> PM Tab.

Fleet Assets Fuel Measurement: Metric

Asset Custom Field1 Label: Potential Hazardous Mater Values...

Asset Custom Field2 Label: Analytical Result Values...

Asset Custom Field3 Label: Values...

Asset Custom Field4 Label: Values...

Tip: If you populate values using the buttons above the custom fields become drop-down lists otherwise they are text fields.

Asset Details Tab Name: Asset Details TEST Configure...

You may define additional custom Asset Detail Fields by clicking "Configure..." button. These fields will be displayed on the Asset Details TEST tab of each Asset

Modules:

Map | List

View: Asset View **1.**

- Facility
- Meter Type, Development
- Development
- Department
- Ward
- Sector
- Region
- Function
- Sector, Region, Development
- Asset View**
- Department, Ward
- New ServiceRequest View
- Test Configure
- Sector, Region

Configure Asset Views

New | Delete

Description	View	Filter	Enabled	Hide Uns
Asset View	(Configure View)	(Configure Filter)	<input checked="" type="checkbox"/>	

Email PM Schedule Summary for all Buildings. Close

Company Settings – PM Module

Company Settings

Save | Back | Help

General Security Facility Settings Custom Details Financials Asset Planning Module Project Planning Module **PM Module** Service Request

Tree Views: Configure...
PM Task Types: Values...
Customize PM Asset Form: Customize...
Customize PM Task Form: Customize...
Customize PM Event Form: Customize...

Budget Number Field: Show field on PM Forms
 Make field mandatory

Use Full Cost Details or Simple Parts Tab?: Cost Details
Display Past Due Count on Home Page: No
Use alternate color check mark for PMs completed late: No
Use this Template if Creating SR from PM: [Dropdown]
From home page allow Events to be completed: 0 days in advance
Email PM Schedule Summary for all Buildings: [Dropdown]
To: [Text Field]
(separate multiple addresses with commas)
Note: For more control on PM schedule notifications users may define their own criteria for receiving PM schedules using the custom notification feature in Preferences -> PM Tab.

Fleet Assets Fuel Measurement: Metric
Asset Custom Field1 Label: Potential Hazardous Mater Values...
Asset Custom Field2 Label: Analytical Result Values...
Asset Custom Field3 Label: Values...
Asset Custom Field4 Label: Values...
Tip: If you populate values using the buttons above the custom fields become dropdowns otherwise they are text fields.
You may define additional custom Asset Detail Fields by clicking "Configure..." buttons. Fields will be displayed on the Asset Details TEST tab of each Asset
Asset Details Tab Name: Asset Details TEST Configure...

Configure values

New | Delete | Import | Export | Search

PM Task Type	Enabled	Sort	Default	Description
PM	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>	
Code	<input checked="" type="checkbox"/>	20	<input type="checkbox"/>	
Health & Safety	<input checked="" type="checkbox"/>	30	<input type="checkbox"/>	
Risk Management	<input checked="" type="checkbox"/>	40	<input type="checkbox"/>	
Daily	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Major	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Minor	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
Training	<input checked="" type="checkbox"/>		<input type="checkbox"/>	

Page 1 of 1 | Displaying 1 - 8 of 8

Close

Tip:
To configure the Values used in the PM Task Type drop down list:
Press the New button to add a new value or click in a cell to edit the existing value.
Optionally you may supply a numeric value in the Sort Order column to define a special sort ordering of the list. Otherwise the list will be sorted alphabetically on the value column.
You may supply a brief description in the Description column which displays in the menu dropdown and is also used to search for menu items when typing into the dropdown list.
Unchecking the Enable box will hide that Value in the drop down menu.
You may select one item to be the default choice. If specified this item will be selected when creating a new record.

Task 44

Save | Back | Templates... | Delete | Copy to New | Email... | Help

General Related Items (17) Check List Parts Scheduled Events Completed Events Activity

Task Details

Task #: TSK44
Estimated Time: 1 Hours
Labour Rate/hr: \$65.00
Based on Assigned:
Estimated Labour Cost: \$150.00
Budget Number: [Dropdown]
Schedule: Set every 1 days at 08:00 starting on 2016-04-24 (4610 Past due events)
Attachments: Add

Task Status

Status: Active
Type*: PM
Assigned Group: PM
Assigned To: Code
Service Provider: Health & Safety
Reminders: Risk Management
Created: Daily
Last Modified: Major
Minor
Training

Summary

Annual Air Compressor Inspection

PM Procedure

1. Drain air and water from tank.
2. Close valve and restart.
3. Look, listen and touch. Determine the cause of any unusual conditions, noises or vibrations and take the necessary corrective steps.

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.

Select the Tabs which will be hidden for Contractor user type:

- Depreciation
 Custom Details
 Notes
 Tasks
 Downtime
 Related Items
 Attachments
 Parts
 Activity
 Map
 Asset History

their own criteria for
accesses -> PM Tab.

become drop-down lists

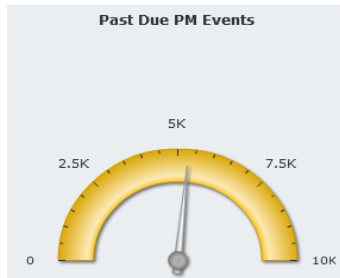
ture..." button. These

Company Settings – PM Module

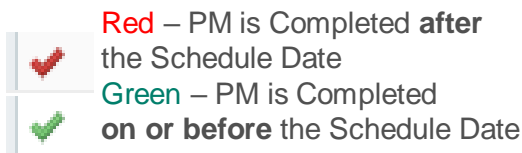
4. Budget number field: Check or uncheck the box to enable the Budget Number field set up on the financials tab to appear on the Task Form and Event Form.

5. Select from the dropdowns:

- Use the Full Cost Details or Simple Parts Tab
- Display Past Due Count on the Home Page



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



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.

The screenshot shows the 'Company Settings' application window. The 'PM Module' tab is selected. The settings are as follows:

- 4.** Budget Number Field: Show field on PM Forms, Make field mandatory
- 5.** Use Full Cost Details or Simple Parts Tab?: Cost Details
- Display Past Due Count on Home Page: No
- Use alternate color check mark for PMs completed late: No
- 6.** Use this Template if Creating SR from PM: [Dropdown menu]
- 7.** From home page allow Events to be completed: 0 days in advance
- 8.** Email PM Schedule Summary for all Buildings: [Dropdown menu]
- To: [Text input field]
- (separate multiple addresses with commas)
Note: For more control on PM schedule notifications users may define their own criteria for receiving PM schedules using the custom notification feature in Preferences - PM Tab.
- Fleet Assets Fuel Measurement: Metric
- Asset Custom Field1 Label: Potential Hazardous Mater | Values...
- Asset Custom Field2 Label: Analytical Result | Values...
- Asset Custom Field3 Label: | Values...
- Asset Custom Field4 Label: | Values...
- Tip: If you populate values using the buttons above the custom fields become drop-down lists otherwise they are text fields.
- Asset Details Tab Name: Asset Details TEST | Configure...
- You may define additional custom Asset Detail Fields by clicking "Configure..." button. These fields will be displayed on the Asset Details TEST tab of each Asset

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

Company Settings

Save | Back | Help

General | Security | Facility Settings | Custom Details | Financials | Asset Planning Module | Project Planning Module | **PM Module** | Service Request

Tree Views:

PM Task Types:

Customize PM Asset Form:

Customize PM Task Form:

Customize PM Event Form:

Budget Number Field: Show field on PM Forms
 Make field mandatory

Use Full Cost Details or Simple Parts Tab?:

Display Past Due Count on Home Page:

Use alternate color check mark for PMs completed late:

Use this Template if Creating SR from PM:

From home page allow Events to be completed: days in advance

Email PM Schedule Summary for all Buildings:

To:

(separate multiple addresses with commas)
Note: For more control on PM schedule notifications users may define their own criteria for receiving PM schedules using the custom notification feature in Preferences -> PM Tab.

9. Fleet Assets Fuel Measurement:

10. Asset Custom Field1 Label:
Asset Custom Field2 Label:
Asset Custom Field3 Label:
Asset Custom Field4 Label:

Tip: If you populate values using the buttons above the custom fields become drop-down lists otherwise they are text fields.

11. Asset Details Tab Name:

You may define additional custom Asset Detail Fields by clicking "Configure..." button. These fields will be displayed on the Asset Details TEST tab of each Asset

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



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.

The screenshot shows the 'Company Settings' window with the 'Service Request' tab selected. The 'Tree Views' section is highlighted with a green box, and a green arrow points from the 'Configure...' button to the 'Configure ServiceRequest Views' dialog box. The 'Service Request Types' dropdown is set to 'Mandatory'. Other settings include 'Service Request Priorities', 'Pending Reasons', 'Customize Service Request Form', 'Enable SR Approvals', 'Prefix for Service Request ID', 'Set Status to Closed if 'Date Completed' entered', 'Who can Delete a Service Request', 'Default Request Time to', 'Default Filter for Home Page listing', 'Budget Number Field', 'Custom Field1 Label', 'Custom Field2 Label', 'Custom Field3 Label', 'Custom Field4 Label', and 'Email Notifications'.

The screenshot shows the 'View:' dropdown menu in the 'Service Request' configuration. The dropdown is open, showing a list of views: Facility, Meter Type, Development, Department, Ward, Sector, Region, Function, Sector, Region, Development, Asset View, Department, Ward, New ServiceRequest View (highlighted), Test Configure, and Sector, Region.

The screenshot shows the 'Configure ServiceRequest Views' dialog box. The dialog has a table with columns: Description, View, Filter, Enabled, Hide Unspecified, and Display Order. The 'New ServiceRequest View' row is highlighted, and the 'View' and 'Filter' cells are highlighted with a green box. The 'View' cell contains '(Configure View)' and the 'Filter' cell contains '(Configure Filter)'. The 'Enabled' checkbox is checked, 'Hide Unspecified' is unchecked, and 'Display Order' is 10.

Description	View	Filter	Enabled	Hide Unspecified	Display Order
New ServiceRequest View	(Configure View)	(Configure Filter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10

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.

Company Settings

Tree Views:

Service Request Types: Mandatory

Service Request Priorities:

Pending Reasons:

Customize Service Request Form:

Enable SR Approvals:
If enabled then persons in the appropriate Approvers role must approve requests which have a Status of 'Pending Approval'. SR Templates can be configured to require an Approval from a specific Role.

Prefix for Service Request ID: SR

Set Status to Closed if 'Date Completed' entered: Yes

Who can Delete a Service Request: Creator with Write Access

Default Request Time to: [Dropdown]

Default Filter for Home Page listing (improves speed): No filter

Budget Number Field: Show field on Service Request form
 Make Budget field mandatory

Custom Field1 Label: Test with custom field with long title Mandatory

Custom Field2 Label: Assigned No. 2 Mandatory

Custom Field3 Label: Mandatory

Custom Field4 Label: Mandatory

Note: The above optional custom fields, if supplied, will display on SR form General Tab. If you supply Values using the Values... button they will display as drop-down lists otherwise as text fields.

Email Notifications: Notify Requestor on submission of new Request
 Notify Group members on Group assignment
 Notify Assigned person on Assignment
 Notify Service Provider on Assignment
 Notify Service Provider of new notes
 Notify Requestor of new notes
 Notify Assigned person of new notes
 Notify Assigned Group members of new notes if no assignee
 Notify Requestor on every Status change
 Notify Requestor when Pending value changes
 Notify Assigned person and Provider when Purchase Order value changes

Service Request - 1641 - Champlain Place

Requestor: Anita Wilson

Type: MM - Minor Maintenance

Category: MM - Minor Maintenance

SubCategory: TC - Trouble Call

Buildings: [Dropdown]

Unit: [Dropdown]

Floor: [Dropdown]

Location/Room: [Dropdown]

Asset: [Find]

Estimated Hours: [Input]

Budget Number: [Dropdown]

Program Budget: [Dropdown]

Work Order: [Dropdown]

Purchase Order: [Dropdown]

Attachments:

Request Status: Status: Closed

Pending: [Dropdown]

Priority: Low

Escalated: Yes

Created: 2017-03-08 11:12 by Anita Wilson

Last Modified: 2017-03-08 11:41 by Mary Dollano

Scheduled Date: [Input]

Actual Start Date: [Input]

Req. Completion Date: [Input]

Date Completed: 2017-03-08 11:41

Date Closed: 2017-03-08 11:41

Assigned Group: [Dropdown]

Assigned To: [Dropdown]

Service Provider: [Dropdown]

Test with custom field with long title: [Dropdown]

Assigned No. 2: [Dropdown]

Summary: Ceilings - Water Stains

Configure values

SR Type	Enabled	Sort	Default	Description	Field Name
MM - Minor Maintenance	<input checked="" type="checkbox"/>	10	<input checked="" type="checkbox"/>		
TC - Trouble Call	<input checked="" type="checkbox"/>	20	<input type="checkbox"/>		
HS - Health & Safety	<input checked="" type="checkbox"/>	30	<input type="checkbox"/>		
Furnishings & Equipment	<input checked="" type="checkbox"/>	40	<input type="checkbox"/>		
Archive	<input checked="" type="checkbox"/>		<input type="checkbox"/>		
Order Materials	<input checked="" type="checkbox"/>		<input type="checkbox"/>		

Tip: To configure the Values used in the SR Type drop down list: Press the New button to add a new value or click in a cell to edit the existing value. Optionally you may supply a numeric value in the Sort Order column to define a special sort ordering of the list. Otherwise the list will be sorted alphabetically on the value column. You may supply a brief description in the Description column which displays in the menu dropdown and is also used to search for menu items when typing into the dropdown list. Unchecking the Enable box will hide that Value in the drop down menu. You may select one item to be the default choice. If specified this item will be selected when creating a new record.

*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.

Company Settings

Service Request

Service Request Types: Values... Mandatory

Service Request Priorities: Values... Mandatory

Pending Reasons: Values... Mandatory

Enable SR Approvals: Approver Roles...

Prefix for Service Request ID: SR

Set Status to Closed if 'Date Completed' entered: Yes

Who can Delete a Service Request: Creator with Write Access

Default Request Time to: []

Default Filter for Home Page listing (improves speed): No filter

Budget Number Field: Show field on Service Request form
 Make Budget field mandatory

Custom Field1 Label: Test with custom field with long title Values... Mandatory

Custom Field2 Label: Assigned No. 2 Values... Mandatory

Custom Field3 Label: Values... Mandatory

Custom Field4 Label: Values... Mandatory

Note: The above optional custom fields, if supplied, will display on SR form General Tab. If you supply Values using the Values... button they will display as drop-down lists otherwise as text fields.

Email Notifications: Notify Requestor on submission of new Request
 Notify Group members on Group assignment
 Notify Assigned person on Assignment
 Notify Service Provider on Assignment
 Notify Service Provider of new notes
 Notify Requestor of new notes
 Notify Assigned person of new notes
 Notify Assigned Group members of new notes if no assignee
 Notify Requestor on every Status change
 Notify Requestor when Pending value changes
 Notify Assigned person and Provider when Purchase Order value changes

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

Service Request - 1641 - Champlain Place

Request Status

Status: Closed

Pending: []

Priority: Low

Escalated: Low

Created: []

Last Modified: []

Scheduled Date: []

Actual Start Date: []

Req. Completion Date: []

Date Completed: 2017-03-08 11:41

Date Closed: 2017-03-08 11:41

Assigned Group: []

Assigned To: []

Service Provider: []

Test with custom field with long title: []

Assigned No. 2: []

Summary: Ceilings - Water Stains

Service Request - 1641 - Champlain Place

Request Status

Status: Closed

Pending: Approval

Priority: []

Escalated: []

Created: []

Last Modified: []

Scheduled Date: []

Actual Start Date: []

Req. Completion Date: []

Date Completed: 2017-03-08 11:41

Date Closed: 2017-03-08 11:41

Assigned Group: []

Assigned To: []

Service Provider: []

Test with custom field with long title: []

Assigned No. 2: []

Summary: Ceilings - Water Stains

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

Company Settings – Service Request

Company Settings

Save | Back | Help

General Security Facility Settings Custom Details Financials Asset Planning Module Project Planning Module PM Module Service Request

Tree Views:

Service Request Types: Mandatory

Service Request Priorities:

Pending Reasons:

Customize Service Request Form:

Enable SR Approvals:
If enabled then persons in the appropriate Approvers role must approve requests which have a Status of 'Pending Approval'. SR Templates can be configured to require an Approval from a specific Role.

Prefix for Service Request ID:

Set Status to Closed if 'Date Completed' entered:

Who can Delete a Service Request:

Default Request Time to:

Default Filter for Home Page listing (improves speed):

Budget Number Field: Show field on Service Request form
 Make Budget field mandatory

Custom Field1 Label: Mandatory

Custom Field2 Label: Mandatory

Custom Field3 Label: Mandatory

Custom Field4 Label: Mandatory

Note: The above optional custom fields, if supplied, will display on SR form General Tab. If you supply Values using the Values... button they will display as drop-down lists otherwise as text fields.

Email Notifications:

- Notify Requestor on submission of new Request
- Notify Group members on Group assignment
- Notify Assigned person on Assignment
- Notify Service Provider on Assignment
- Notify Service Provider of new notes
- Notify Requestor of new notes
- Notify Assigned person of new notes
- Notify Assigned Group members of new notes if no assignee
- Notify Requestor on every Status change
- Notify Requestor when Pending value changes
- Notify Assigned person and Provider when Purchase Order value changes

Configure ServiceRequests Form

Select the Tabs which will be hidden for Contractor user type:

Requestor Notes Related Cost Items Triggers Activity

Fields Displayed:

Field	Displayed for Users	Displayed for Contractors	Contractors May Edit
ActionID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Actual Start Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Approved By	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Approved Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Approver RoleID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
AssetID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Tip:
Here you may hide certain fields that you do not use or you may choose to hide certain fields for Contractors.
As well certain Tabs maybe hidden for Contractors.
Use caution here, as soon as you uncheck a box this is immediately saved and will affect your users.

New Service Request

Save | Back | Copy to New | Template... | Delete | Help

General **Requestor** Notes Related Cost Items Triggers

Request Details

Request:

Requestor:

Type:

Category:

SubCategory:

Buildings:

Unit:

Floor:

Location/Room:

Asset:

Estimated Hours:

Budget Number:

Program Budget:

Work Order:

Purchase Order:

Attachments:

Request Status

Status:

Pending:

Priority:

Escalated:

Created:

Last Modified:

Scheduled Date:

Actual Start Date:

Req. Completion Date:

Date Completed:

Date Closed:

Assigned Group:

Assigned To:

Service Provider:

Test with custom field with lon title:

Assigned No. 2:

Summary:

Description:

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 start 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: Show field on Service Request form
 Make Budget field mandatory

13. Custom Fields:

Custom Field1 Label:	Test with custom field with long title	Values...	<input type="checkbox"/> Mandatory
Custom Field2 Label:	Assigned No. 2	Values...	<input type="checkbox"/> Mandatory
Custom Field3 Label:		Values...	<input type="checkbox"/> Mandatory
Custom Field4 Label:		Values...	<input type="checkbox"/> Mandatory

Note: The above optional custom fields, if supplied, will display on SR form General Tab. If you supply Values using the Values... button they will display as drop-down lists otherwise as text fields.

14. Email Notifications:

- Notify Requestor on submission of new Request
- Notify Group members on Group assignment
- Notify Assigned person on Assignment
- Notify Service Provider on Assignment
- Notify Service Provider of new notes
- Notify Requestor of new notes
- Notify Assigned person of new notes
- Notify Assigned Group members of new notes if no assignee
- Notify Requestor on every Status change
- Notify Requestor when Pending value changes
- Notify Assigned person and Provider when Purchase Order value changes

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.

The screenshot shows the 'Company Settings' window for 'Service Request Client'. The 'Service Request Client' tab is active. Three numbered callouts highlight the following settings:

- 1.** 'Allow clients to create their own accounts:' is set to 'Yes'.
- 2.** 'Client Home Page URL:' is set to 'https://assetplanner.com/src_home?token=T58738Z530'. A note below states '(This Link Enables New User button if Yes above)'.
- 3.** 'What Clients may view:' is set to 'Any Requests for their Buildings'.

Other visible settings include: 'Login Page: https://assetplanner.com/login (Does not allow New User button)', 'Other fields to display on New Request form: *Phone, MobilePhone, Priority, RequestedCompletionDate, CCEmail, Floor, Location, *AssetID, BudgetNumber', and a 'Welcome Text for Client Service Request Home Page:' section containing a blue welcome message and green instructions: 'Use the "New Request" link on the left to create a new request. Once created you will receive Email communications as we update the status your request. You may also track the status of your request online using the "My Requests" link.'

Below the welcome text is a 'Left column Shortcuts box' containing a link to 'http://assetplanner.com Dashboard View'.

**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

The screenshot shows the 'Company Settings' window for the 'Service Request Client'. The interface includes a top navigation bar with tabs for 'Details', 'Financials', 'Asset Planning Module', 'Project Planning Module', 'PM Module', 'Service Request', and 'Service Request Client'. The 'Service Request Client' tab is active.

Key settings and callouts:

- 4.** 'Allow clients to create their own accounts:' is set to 'Yes'. Below it, 'Client Home Page URL:' is https://assetplanner.com/src_home?token=T587382530. A note states: '(This Link Enables New User button if Yes above)'. 'What Clients may view:' is set to 'Any Requests for their Buildings'.
- 5.** 'Login Page:' is <https://assetplanner.com/logon>. A note states: '(Does not allow New User button)'. 'Other fields to display on New Request form:' is '*Phone,MobilePhone,Priority,RequestedCompletionDate,CCEmail,Floor,Location,*AssetID,BudgetNumber'. A 'Change...' button is next to it. A note states: '(* = field will be required)'. A green box highlights the 'Login Page' and 'Other fields to display on New Request form' sections.
- 6.** 'Welcome Text for Client Service Request Home Page:' is a rich text editor containing: 'Welcome to <Client Name> Service Request Tracking System. Use the "New Request" link on the left to create a new request. Once created you will receive Email communications as we update the status your request. You may also track the status of your request online using the "My Requests" link.'
- 7.** 'Left column Shortcuts box. Content or links you provide here will enable a Shortcuts box to appear in the left column of SR Client pages.' The box contains a link: <http://assetplanner.com> and 'Dashboard View'.

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



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

Save | Back | Help

General Security Facility Setting Financials **Energy** Permissions

Tree Views: **Configure...**

Temperature Units: Fahrenheit

Budget Number Field: Show field on Meter Advanced tab

Enable Approval Workflow (AW):

Accounts Payable Email for Flat File(AW):

Accounts Payable Email for Approval(AW):

Last time initial notification was sent (AW):

Custom Field1 Label: Meter # Values...

Custom Field2 Label: Premise # Values...

Custom Field3 Label: Site ID Values...

Custom Field4 Label: Values...

Custom Field5 Label: Values...

Custom Field6 Label: Values...

Consumption2 Label:

Tip: If you populate values using the buttons above the custom fields become drop-down lists otherwise they are text fields.

Enable error checking on meter entry page: Values out of Range, Missing/overlapping Date: x

Calculate error checking based on: Same Period of Previous Year

Warn if data varies from average by more than: 80 (percent)

Warn if data varies from predicted by more than: 70 (percent) for meters with Weather Regression data

Regression calculated against Daily or Monthly consumption: Monthly

Minimum Regression Confidence: 0.5 (0.2 to 0.99)

Default Heating Balance Point: 65 (degrees)

Default Cooling Balance Point: 65 (degrees)

*Base Load Start Date: 2008-01-01

*Base Load End Date: 2008-12-31

Re-Analyze Now

The above four values set the defaults to be used in Weather Regression/Modeling. You may also set these values on a per Meter basis on the Advanced tab of the Meter form.

*If the Start/End dates are blank, AP will analyze each meter and find a 12 month period with the best confidence level and use that for the base year of the meter.

Only meters with good Regression Data will be included in Energy Modeling Reports. To list meters with missing Regression Data [click here](#). These meters may need more data, may need adjustment to the base dates or may have the 'Affected By' setting incorrect.

Home | My Dashboard

Modules:

Asset Register:

Map | List

Type of Usage, Functional Use

Asset Class

Type of Usage, Functional Use

Type of Usage, School Type

School Type

Functional Use

City

Template

MeterType

FacilityFunction, MeterType

MeterType, FacilityZone

Configure Meter Views

New | Delete

Description	View	Filter	Enabled	Hide Unspecified	Flatten Tree
MeterType	(Configure View)	(Configure Filter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FacilityFunction, MeterType	(Configure View)	(Configure Filter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MeterType, FacilityZone	(Configure View)	(Configure Filter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Close

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.

The screenshot shows the 'Company Settings' window with the 'Energy' tab selected. The 'Budget Number Field' checkbox is checked. The 'Custom Field' section is highlighted with a red box, showing labels for Custom Field 1 through 6. The 'Consumption2 Label' field is highlighted with a red circle. The 'Re-Analyze Now' button is visible at the bottom.

Tree Views:

Temperature Units: Fahrenheit

1. Budget Number Field: Show field on Meter Advanced tab

Enable Approval Workflow (AW):

Accounts Payable Email for Flat File(AW):

Accounts Payable Email for Approval(AW):

Last time initial notification was sent (AW):

2. Custom Field1 Label: Meter # Values...

Custom Field2 Label: Premise # Values...

Custom Field3 Label: Site ID Values...

Custom Field4 Label: Values...

Custom Field5 Label: Values...

Custom Field6 Label: Values...

3. Consumption2 Label:

Tip: if you populate values using the buttons above the custom fields become drop-down lists otherwise they are text fields.

Enable error checking on meter entry page: Values out of Range; Missing/overlapping Date: x x

Calculate error checking based on: Same Period of Previous Year

Warn if data varies from average by more than: 80 (percent)

Warn if data varies from predicted by more than: 70 (percent) for meters with Weather Regression data

Regression calculated against Daily or Monthly consumption: Monthly

Minimum Regression Confidence: 0.5 (0.2 to 0.99)

Default Heating Balance Point: 65 (degrees)

Default Cooling Balance Point: 65 (degrees)

*Base Load Start Date: 2008-01-01

*Base Load End Date: 2008-12-31

The above four values set the defaults to be used in Weather Regression/Modeling. You may also set these values on a per Meter basis on the Advanced tab of the Meter form.

*If the Start/End dates are blank, AP will analyze each meter and find a 12 month period with the best confidence level and use that for the base year of the meter.

Only meters with good Regression Data will be included in Energy Modeling Reports. To list meters with missing Regression Data [click here](#). These meters may need more data, may need adjustment to the base dates or may have the 'Affected By' setting incorrect.

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

Save | Back | Help

General | Security | Facility Setting | Financials | **Energy** | Permissions

Tree Views:

Temperature Units: Fahrenheit

Budget Number Field: Show field on Meter Advanced tab

Enable Approval Workflow (AW):

Accounts Payable Email for Flat File(AW):

Accounts Payable Email for Approval(AW):

Last time initial notification was sent (AW):

Custom Field1 Label: Meter #

Custom Field2 Label: Premise #

Custom Field3 Label: Site ID

Custom Field4 Label:

Custom Field5 Label:

Custom Field6 Label:

Consumption2 Label:

Tip: If you populate values using the buttons above the custom fields become drop-down lists otherwise they are text fields.

Enable error checking on meter entry page: Values out of Range; Missing/overlapping Date:

Calculate error checking based on: Same Period of Previous Year

Warn if data varies from average by more than: 80 (percent)

Warn if data varies from predicted by more than: 70 (percent) for meters with Weather Regression data

Regression calculated against Daily or Monthly consumption: Monthly

Minimum Regression Confidence: 0.5 (0.2 to 0.99)

Default Heating Balance Point: 65 (degrees)

Default Cooling Balance Point: 65 (degrees)

*Base Load Start Date: 2008-01-01

*Base Load End Date: 2008-12-31

The above four values set the defaults to be used in Weather Regression/Modeling. You may also set these values on a per Meter basis on the Advanced tab of the Meter form.

*If the Start/End dates are blank, AP will analyze each meter and find a 12 month period with the best confidence level and use that for the base year of the meter.

Only meters with good Regression Data will be included in Energy Modeling Reports. To list meters with missing Regression Data [click here](#). These meters may need more data, may need adjustment to the base dates or may have the 'Affected By' setting incorrect.

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.

Company Settings

Save | Back | Help

General Security Facility Setting Financials **Energy** Permissions

Tree Views:

Temperature Units: Fahrenheit

Budget Number Field: Show field on Meter Advanced tab

Enable Approval Workflow (AW):

Accounts Payable Email for Flat File(AW):

Accounts Payable Email for Approval(AW):

Last time initial notification was sent (AW):

Custom Field1 Label:

Custom Field2 Label:

Custom Field3 Label:

Custom Field4 Label:

Custom Field5 Label:

Custom Field6 Label:

Consumption2 Label:

Tip: If you populate values using the buttons above the custom fields become drop-down lists otherwise they are text fields.

Enable error checking on meter entry page: Values out of Range; Missing/overlapping Date:

Calculate error checking based on: Same Period of Previous Year

Warn if data varies from average by more than: 80 (percent)

Warn if data varies from predicted by more than: 70 (percent) for meters with Weather Regression data

Regression calculated against Daily or Monthly consumption: Monthly

Minimum Regression Confidence: 0.5 (0.2 to 0.99)

Default Heating Balance Point: 65 (degrees)

Default Cooling Balance Point: 65 (degrees)

*Base Load Start Date: 2008-01-01

*Base Load End Date: 2008-12-31

The above four values set the defaults to be used in Weather Regression/Modeling. You may also set these values on a per Meter basis on the Advanced tab of the Meter form.

*If the Start/End dates are blank, AP will analyze each meter and find a 12 month period with the best confidence level and use that for the base year of the meter.

Only meters with good Regression Data will be included in Energy Modeling Reports. To list meters with missing Regression Data [click here](#). These meters may need more data, may need adjustment to the base dates or may have the 'Affected By' setting incorrect.

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.

The screenshot shows the 'Company Settings' application with the 'Energy' tab selected. The 'Regression' section is highlighted with a green box. The settings in this section are:

- Regression calculated against Daily or Monthly consumption: Monthly
- Minimum Regression Confidence: 0.5 (0.2 to 0.99)
- Default Heating Balance Point: 65 (degrees)
- Default Cooling Balance Point: 65 (degrees)
- *Base Load Start Date: 2008-01-01
- *Base Load End Date: 2008-12-31
- Re-Analyze Now button

Below the highlighted section, there is a note: "The above four values set the defaults to be used in Weather Regression/Modeling. You may also set these values on a per Meter basis on the Advanced tab of the Meter form."

Another note: "*If the Start/End dates are blank, AP will analyze each meter and find a 12 month period with the best confidence level and use that for the base year of the meter."

A final note: "Only meters with good Regression Data will be included in Energy Modeling Reports. To list meters with missing Regression Data [click here](#). These meters may need more data, may need adjustment to the base dates or may have the 'Affected By' setting incorrect."

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.