



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**.

Asset Planner - Login

Please enter your Login Information:

User ID (Email):

Password:

Keep me logged in on this computer

[I forgot my password](#)

GeoTrust
secured
website

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

Asset Planner - Login

Your password has expired. Please verify existing and provide new Password below.

User ID (Email):

Current Password:

New Password:

Verify Password:

[I forgot my password](#)

GeoTrust
secured
website

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.

Navigation:

Screen Layout, Navigation Tools, User Preferences, Site Map/List Table

Home Screen Layout

The **Menu Bar** provides links to commonly used features such as Reports, Dashboard, Favorites and Preferences etc. In the PM Module tab you'll find links such as find and create tasks, search for events as well as create triggers and review the Task templates.

PM / PM Home

Welcome to Asset Planner PM 7.3 (You may click a chart item or calendar below to filter the grid)

May, 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
17 PMs	50 PMs	22 PMs	19 PMs	19 PMs	17 PMs	17 PMs
7	8	9	10	11	12	13
17 PMs	24 PMs	20 PMs	20 PMs	17 PMs	17 PMs	17 PMs
14	15	16	17	18	19	20
20 PMs	19 PMs	17 PMs	18 PMs	18 PMs	17 PMs	17 PMs
23	24	25	26	27		
20 PMs	19 PMs	17 PMs	17 PMs	17 PMs		
30	31					
20 PMs	19 PMs					
6	7					
17 PMs	31 PMs	22 PMs				

Past Due PM Events

2.5K 7.5K 10K

Preventive Maintenance Calendar

PM Events for Thursday May 4, 2017

Show:	PM Event	PM Task	Time	Attachments	Assigned To	Asset	WorkOrder	Summary	Service Req.
Buildings: Public Library - Building									
<input type="checkbox"/>	98727	44	08:00:00			Packaged Air Con...		Annual Air Compress...	
<input type="checkbox"/>	98221	44	08:00:00					Annual Air Compress...	
Buildings: HSC Bldg 1									
<input type="checkbox"/>	119504	44	08:00:00					Annual Air Compress...	
<input type="checkbox"/>	119139	44	08:00:00					Annual Air Compress...	
Buildings: Fire Station #1 - Building									
<input type="checkbox"/>	102871	44	08:00:00			Packaged Air Con...		Annual Air Compress...	
<input type="checkbox"/>	102403	44	08:00:00			Packaged Air Con...		Annual Air Compress...	
Buildings: Community Centre - Site									
<input type="checkbox"/>	85110	46	08:00:00			Community Centre...		Daily Wet / Winter Weather Site Inspection	
Buildings: Champlain Place									

The **Navigator & Facility list panel** consist of: Module Selection, Facility Map & List, Quick Links, & History Items.

The **Preventive Maintenance Calendar** shows the number of events scheduled for each day of the calendar.

The **Past Due PM Events** shows the number of events that are due. Click the graph to list all the past due PM Events.

Click the **bar** in the graph or **blue text** in the calendar will source the details in this section.

Use this **Column** button to customize the columns in this section. This will allow you to place a check mark beside which columns of information are important to be displayed for you.

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

Home Screen Layout

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

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

The **Tool Box** contains many useful links including **Shared Documents** folder.

Bookmark any page in AssetPlanner™ as a **Favorite** for quick and easy access.

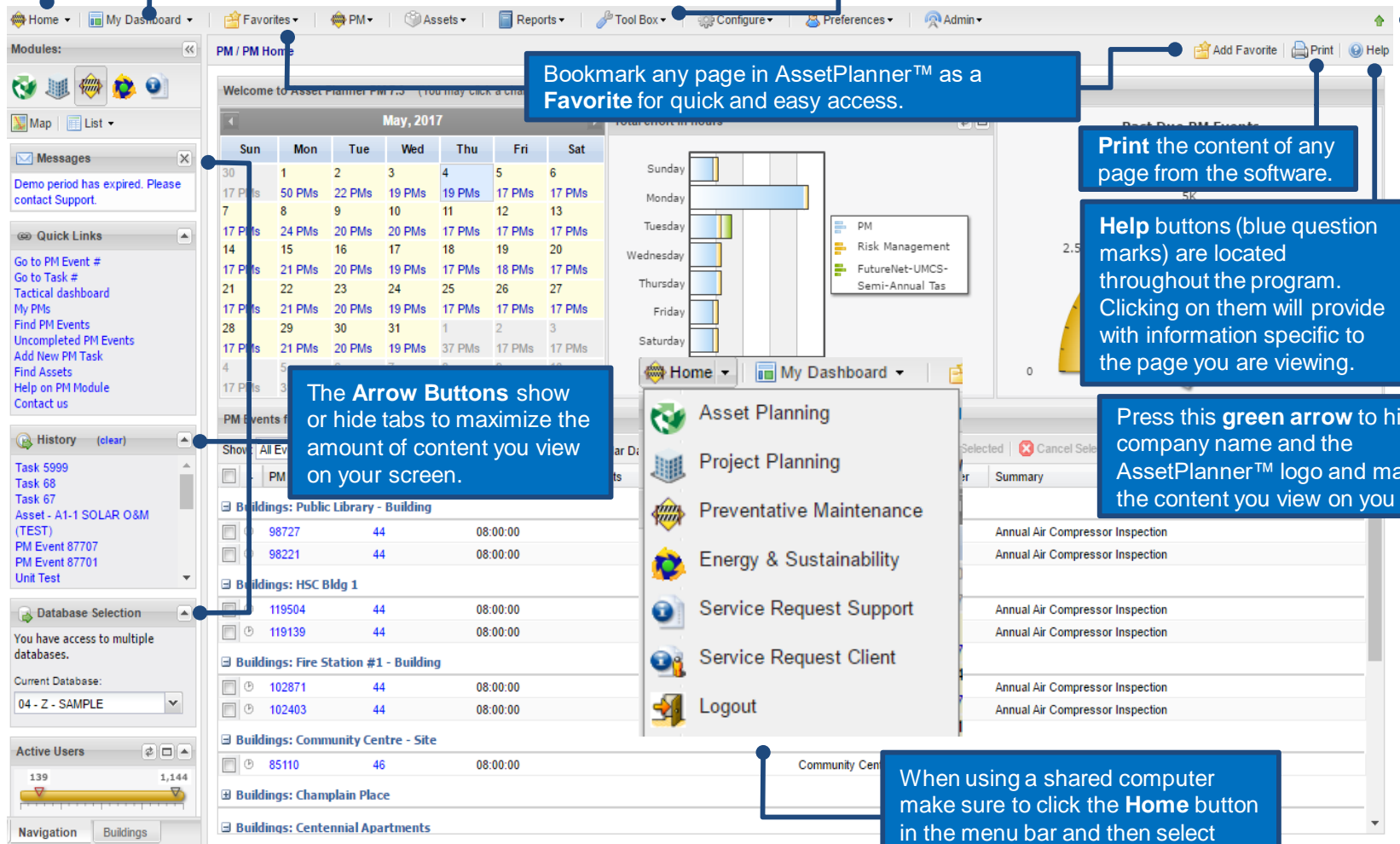
Print the content of any page from the software.

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

Press this **green arrow** to hid the company name and the AssetPlanner™ logo and maximize the content you view on you screen.

The **Arrow Buttons** show or hide tabs to maximize the amount of content you view on your screen.

When using a shared computer make sure to click the **Home** button in the menu bar and then select **Logout** to end your session.



User Preferences

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

The **Paginate Listing** determines how many records should be displayed in a table before the table is split up into multiple pages.

Set the **Notes Display Order** to show most recent notes at the top or end of the notes list.

Set the **Print Action Button** to *Print* which will launch the print dialog with one click or *Open the Print View* first then press print on the new window.

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

Select the **Color Theme** on your AssetPlanner™ page according to the your preference.

Preferences are user based settings that are remembered each time you use AssetPlanner™.

Ensure to click **Save** when changes has been made to the preferences page.

Use this button to **Change your Password**.

**Note: Some changes require a browser refresh to take affect.*

The screenshot shows the 'User Preferences' window in AssetPlanner. At the top, there are tabs for 'General', 'Projects', 'PM', and 'Service Requests'. A dropdown menu is open for 'Preferences', showing options for 'General', 'Projects', 'PM', and 'SR'. The main area contains several settings, each with a callout box:

- Paginate Listings:** Set to 750.
- Notes Display Order:** Set to 'Display Most Recent Note Last'.
- Print button action:** Set to 'Open Print view'.
- Page Break between Sections on Reports:** Set to 'No'.
- Default Fiscal Year Selection:** Set to 'Yes'.
- Remember last Cost Item entered:** Set to 'Yes'.
- Number of History Items to keep:** Set to 20.
- Color Theme:** Set to 'Gray'.

At the bottom of the window, there are four buttons: 'Save', 'Change Password', 'Logout', and 'Help'. A callout box points to the 'Change Password' button.

User Preferences

Preferences

Projects PM Service Requests

Select notifications based on PM's assigned directly to you, and/or various custom criteria.

For PM's assigned to You

Email Assigned PM Schedule: Weekly

Email Individual PM Event Reminders: Never

PM Home Page

Default Events to show on Home Page: All Events

Hide Completed PM's: Yes

Custom PM Schedule Notifications

+ New | ✎ Modify | - Delete

Buildings	Region	Sector	Frequency
No custom notifications have been created. Press New button to create			

Save Change Password Logout Help

Determine the **frequency** of a summary of the Assigned PM Scheduled to be sent to you.

Determine if and when you want individual Event reminders to be sent to you.

Set the **PM Home Page** view of the PM Module to meet your daily needs of information to be displayed.

Determine when to notify the user based on the custom PM notification area.

***Note:** Always click **Save** when changes has been made before leaving the page.

Site Map / Site List Table

Display your building/site on a **Map** based on their address information.

PM / Element Map

Element Map

Save Filters... Map Type: Automatic Group pins Center Map List

ALBERTA MANITOBA SASKATCHEWAN ONTARIO

Edmonton Regina Winnipeg

Displays detailed building/site information for multiple sites at the same time. First select an option from the List menu so it knows which list you wish to view.

Filter, export or search this table using key words.

Home My Dashboard Favorites PM Assets Reports Tool Box Configure Preferences Admin

PM / Buildings

Buildings List

Filters New Delete Duplicate Assign Template Copy to DB.. Export Search

Buildings	Address	City	Department	Buildings Size	Buildings Measure Unit	Site Size	Sit
01 All Townhouses		Windsor			Sq.M.		Sq
250 Davenport Road	250 Davenp...	Toronto	Community Initi...	9,146	Sq.M.	0.00	Sq
250 Davenport Road - Site					Sq.M.	0.00	Sq
445 Glengarry					Sq.M.	0.00	Sq
5402-5404 Reginald St.					Sq.M.	0.00	Sq
5405-5417 Reginald St.					Sq.M.	0.00	Sq
5405-5417 Reginald St. - Unit - 5					Sq.M.		Sq
5405-5417 Reginald St. - Unit - 5					Sq.M.		Sq
5405-5417 Reginald St. - Unit - 5407	5405-5417 ...	Windsor	City of Windsor...		Sq.M.		Sq
5406-5418 Reginald St.	5406-5418 ...	Windsor	City of Windsor...	7,448	Sq.M.	0.00	Sq
5421-5423 Reginald St.	5421-5423 ...	Windsor	City of Windsor...	4,256	Sq.M.	0.00	Sq
5425-5427 Reginald St.	5425-5427 ...	Windsor	City of Windsor...	3,200	Sq.M.	0.00	Sq

View: All Buildings Facility Unit Building Site Roads

Selecting the **Down Arrow** beside a column label will sort the table, add or remove columns or group your sites based on any of the columns in the List table.

Site List

Home | My Dashboard | Favorites | PM | Assets | Reports | Tools

Modules: PM / 250 Davenport Road

250 Davenport Road

Save | Back | New | Delete | Help

General | Details | Condition Summary | Unit | Contact

Buildings: * 250 Davenpo
Description: 4 story buildin

Function:
Sector: * Housing
Region: Housing Con
Development: 250 Davenpo
Department: Community In
Facility Code:
Unique Building ID:
Floor List: 1,2,3,4
Optional comma Request Module
Address: 250 Davenpo
City: Toronto
Country: Canada
Province/State: Ontario
Postal/Zip: M5R 1J8

Navigation | Building

Select a different grouping structure by using the **View** drop-down.

Click the '+' sign to expand a grouping and see which facilities are part of a grouping.

The Building also has '+' sign similar to the grouping. Expanding it will show what information is related to the specific building as well as which module has data relating to it. Selecting of the items will automatically switch you to the module and produce the list of details.

Select a **Building** by clicking on the Building/Site name. Double-click to open the facility form.

When **Building** tab is selected at the bottom right of the navigator tab, the panel will display site portfolio using the default grouping structure.

Note: Groupings are displayed as **folder** icons, while sites have a building icon.

Site Details

Details tab is where more information about the building/site can be added.

An area to store pictures, word, pdf., excel documents or CAD drawings that relate to the building/site.

Displays where the Building/Site is located.

These fields are used to group sites in the Building/Site tree, when filtering meters/meter data and in the reports

The Address information is used to determine where each Building/Site will be located on the maps.

250 Davenport Road

Save Back New Delete Help

General Details Condition Summary Unit Contact Custom Details Building Details History Notes Tasks (1) Attachments Funding FCI Map Activity

Buildings: * 250 Davenport Road

Description: 4 story building. Brick.

District No: [dropdown]

Function: [dropdown]

Sector: * Housing [dropdown]

Region: Housing Connections [dropdown]

Development: 250 Davenport Road [dropdown]

Department: Community Initiatives [dropdown]

Facility Code: [input]

Unique Building ID: [input]

Floor List: 1,2,3,4

Optional comma separated list of floor names. (Used by Service Request Module).

Address: 250 Davenport Rd

City: Toronto [input]

Country: Canada [dropdown]

Province/State: Ontario [dropdown]

Postal/Zip: M5R 1J8 [input]

Status: Active [dropdown]

Buildings consists of

- 56 Element(s)
- 3 Audits(s)
- 13 Project(s)
- 38 Asset(s)
- 1 Meter(s)
- 28 Service Request(s)

AP Standard Classifications

Level1: [dropdown]

Level2: [dropdown]

Level3: [dropdown]

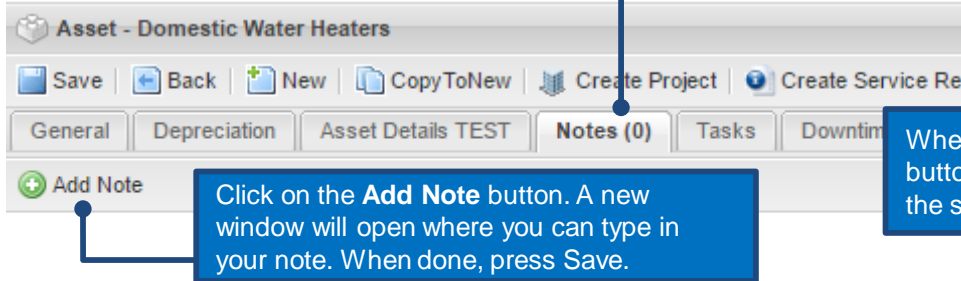
Level4: [dropdown]

Frequent Actions

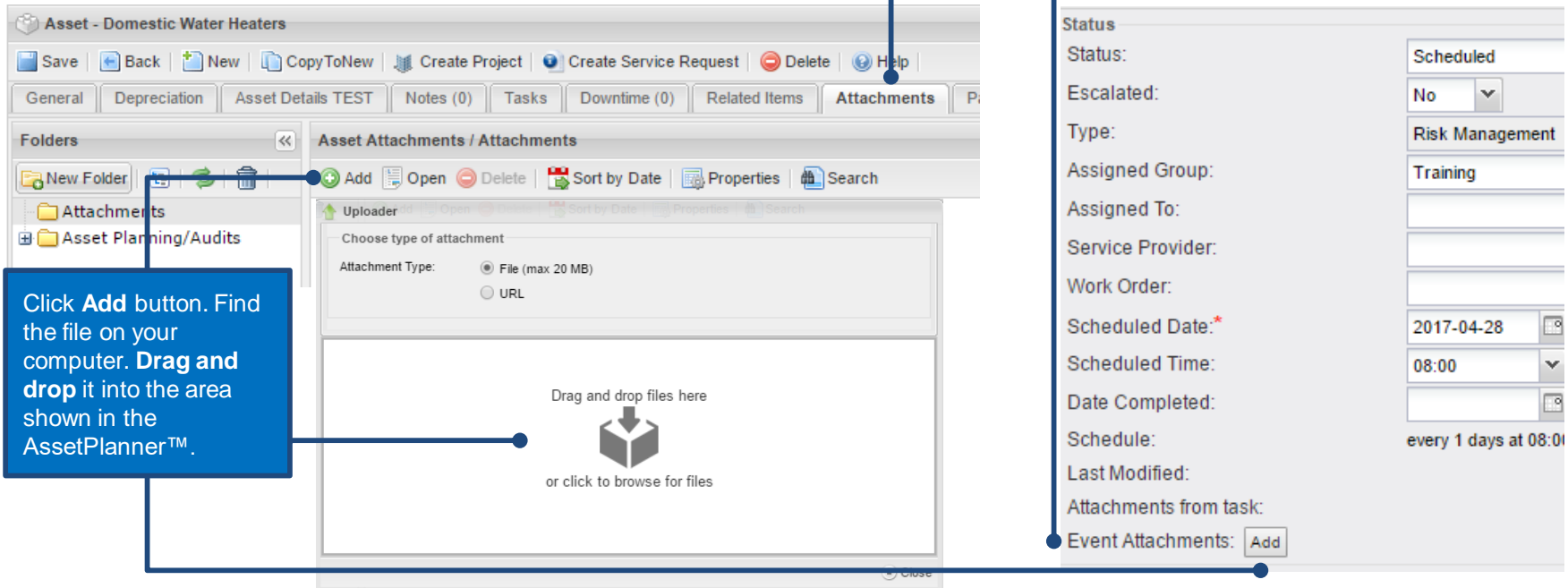
Frequent Actions

There are a couple of frequent actions or activities that one will perform in AssetPlanner™

Wherever you see a notes tab in the software, the action to add a note is the same



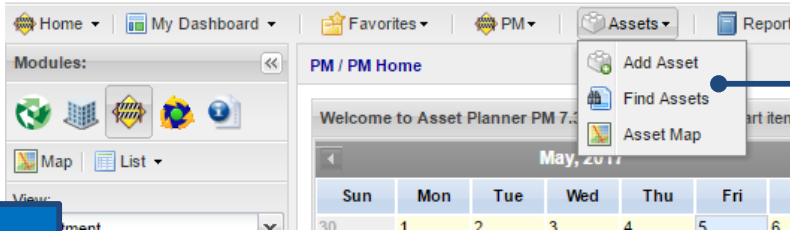
Wherever you see an **Attachment** tab or Attachment button, the action to find and include in the database is the same.



Assets & Preventative Maintenance:

Creating PM Assets

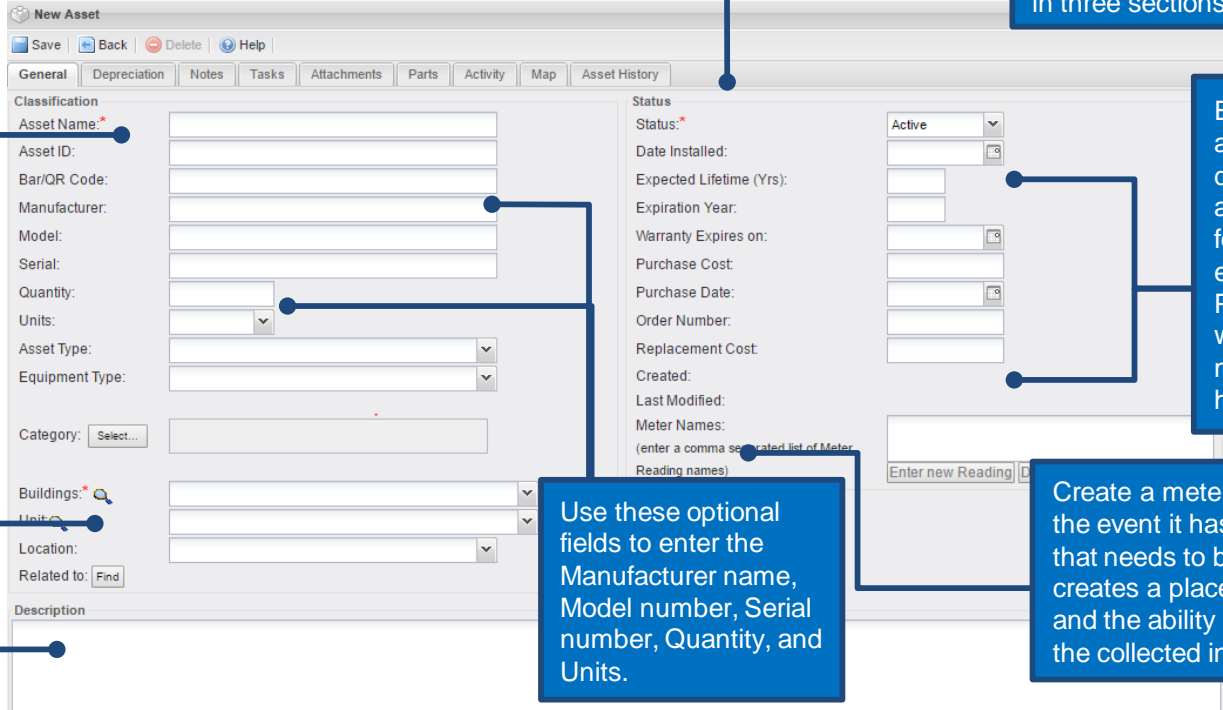
Before one can create a preventative maintenance task, one must first identify what it is that needs to be maintained.



Select **Add Asset** from the Assets button in the menu bar.

The **New Asset** template window will open. The asset template can be summarized in three sections.

Type in the Asset Name. Asset ID or Barcode can be added later.



The 'New Asset' form is divided into several sections:

- Classification:** Fields for Asset Name, Asset ID, Bar/QR Code, Manufacturer, Model, Serial, Quantity, Units, Asset Type, and Equipment Type.
- Status:** Fields for Status (Active), Date Installed, Expected Lifetime (Yrs), Expiration Year, Warranty Expires on, Purchase Cost, Purchase Date, Order Number, Replacement Cost, Created, Last Modified, and Meter Names.
- Location:** Fields for Buildings, Unit, and Location.
- Description:** A large text area for describing the asset.

These fields describe the specifics of what the asset is and where it is located (which building and where in the building).

Enter dates for the asset such as installed date, its life expectancy and the projected year for it to reach its life expectancy. Purchasing and warranty information may also be recorded here.

Description is an open text field to further describe the asset.

Use these optional fields to enter the Manufacturer name, Model number, Serial number, Quantity, and Units.

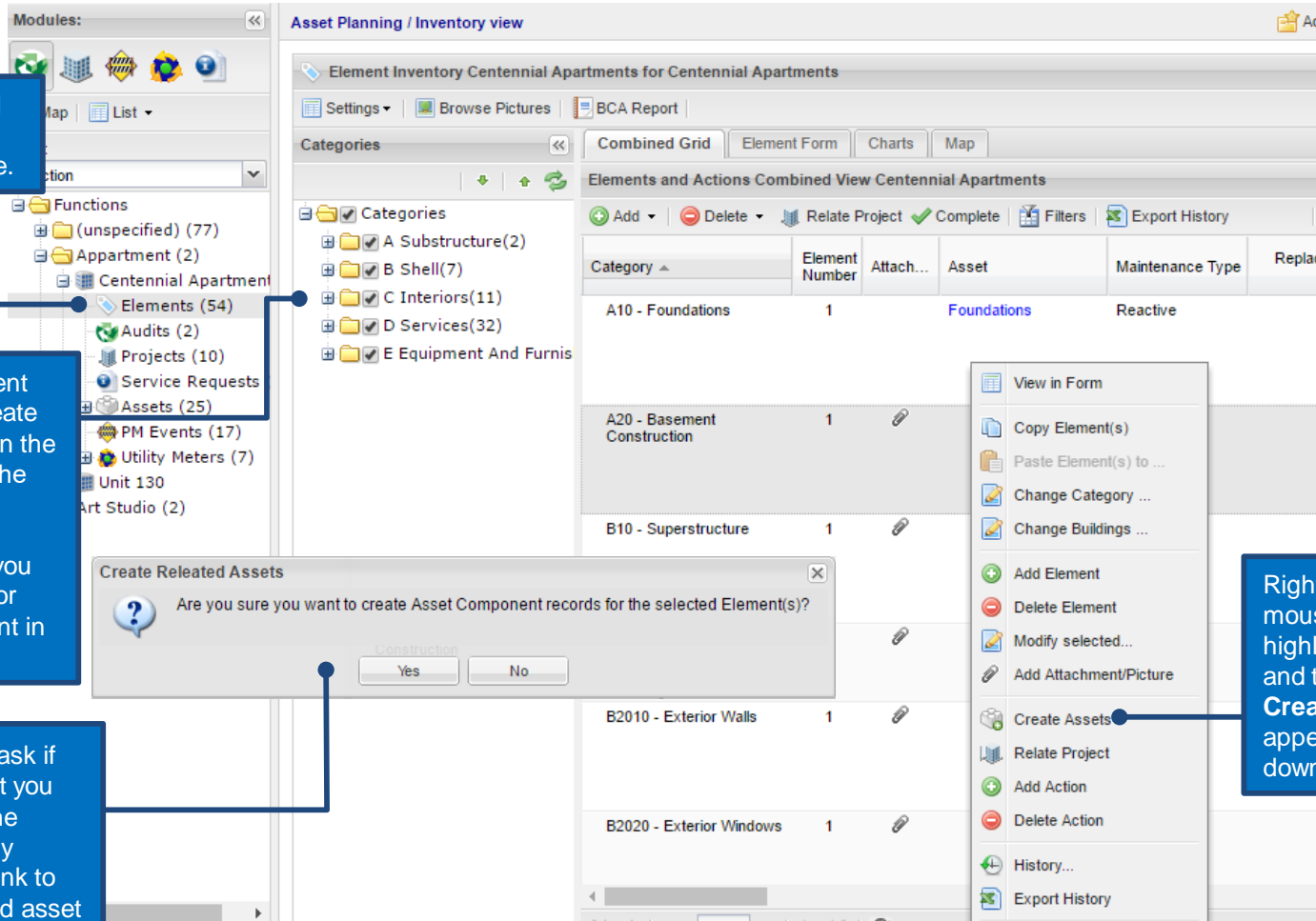
Create a meter name for the asset in the event it has a meter information that needs to be tracked. This creates a place holder for the data and the ability to generate a report of the collected info.

Press **Save after the mandatory fields of Asset name, Category, Sub Category, Facility & Date Installed have been populated.*

***Tip:** When identifying assets, note that the Asset ID field is a unique level to be used only one asset in the database. So if Asset ID won't be used, then the Asset Name or Location field would be places to help set apart an asset from other like asset in the databases that may require the same naming convention. ex. Asset Name RTU 001 vs Asset Name RTU*

Creating Assets

In the event Asset Planning module is used, assets can be created from the published element inventory.



Select the published inventory for the facility of your choice.

To select the element that you wish to create as an asset, click on the "+" sign in front of the category and sub category folders to expand them until you are able to source or highlight the element in the Combined grid.

The system will ask if you are sure that you want to create the asset. Confirm by clicking **Yes**. A link to the newly created asset will appear in the element grid.

Right click with the mouse on the highlighted element and the option to **Create Asset** will appear in the drop down menu.

***Note:** Creating an asset in this method will automatically populate the necessary fields required to create an asset. It may be updated further by clicking on the link provided in the grid to see its details.

Creating Assets

After an asset has been created, all the tabs on the asset page become active...

Enter the some asset details here to help track **depreciation** values for applicable assets.

This is a **customizable** tab if additional details are required to be displayed. Tab can also be renamed according to preferred tab name.

Asset - Washer

Save Back New CopyToNew Create Project Create Service Request Delete Help

General Depreciation Asset Details TEST Notes (0) Tasks Downtime (1) Related Items Attachments Parts Activity Map Asset History

Depreciation Factors

Starting Date: 2017-03-15

Purchase Cost: \$10,500.00

Custom Rate:

Depreciation Type: Straight-line

Depreciation Years: 20

Depreciation Status

Net Book Value: 0 (End FY 2015)

Current Net Book value: \$10,409.38

Residual Value:

Disposal/Retirement Date:

Disposal Type:

Asset - Washer

Save Back New CopyToNew Create Project Create Service Request Delete Help

General Depreciation Asset Details TEST Notes (0) Tasks Downtime (1) Related Items Attachments Parts Activity Map Asset History

Depreciation Schedule

Fiscal Year	Date	Depreciation Expense
2016	2017-05-31	\$110

Asset - Washer

Save Back New CopyToNew Create Project Create Service Request Delete Help

General Depreciation Asset Details TEST Notes (0) Tasks Downtime (1) Related Items Attachments Parts Activity Map Asset History

Location #:

Location Name:

Notes:

Sample ID:

Quantity1:

Condition:

Access:

Friable (Y/N):

Abatement Priority:

Abatement Cost Estimate:

Add or view existing created maintenance tasks for the asset in this tab.

Asset - Washer

Save Back New CopyToNew Create Project Create Service Request Delete Help

General Depreciation Asset Details TEST Notes (0) Tasks Downtime (1) Related Items Attachments Parts Activity Map Asset History

Tasks:

Task	Summary	Schedule	Last Completed
TSK49	Test Boiler	day 1 of every 3 months at 08:00 starting on 2017-05-07	2017-03-31

Enter additional **notes** about the asset in this section.

Asset - Washer

Save Back New CopyToNew Create Project Create Service Request Delete Help

General Depreciation Asset Details TEST Notes (0) Tasks Downtime (1) Related Items Attachments Parts Activity Map Asset History

Add Note

New Note

Tahoma

Save Cancel

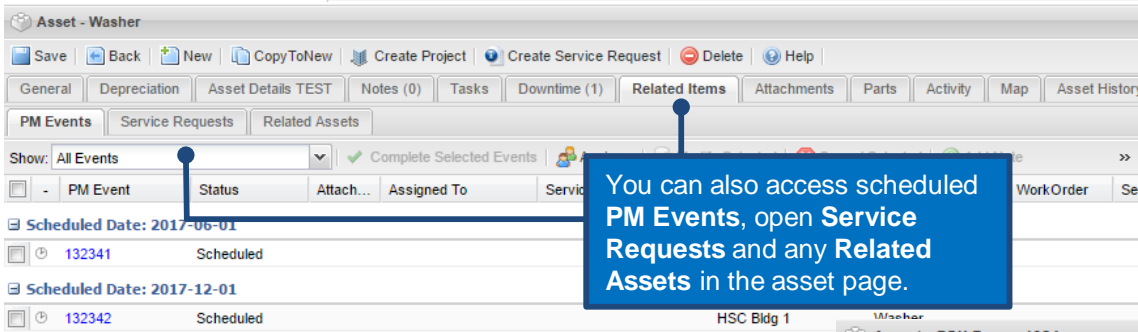
*How to created a scheduled task for the asset will be covered later in the presentation.

Creating Assets

After an asset has been created, all the tabs on the asset page become active...

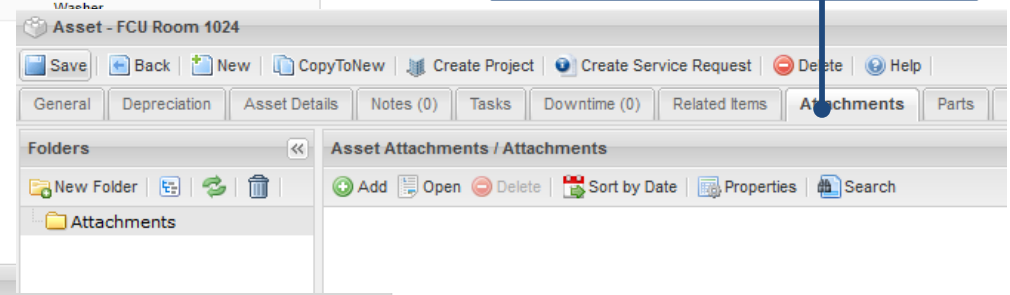


Use this tab if you wish to automatically change the status of an asset from Active to Inactive for certain a period of time. Set the **Start** and **End** date time of when you wish this to happen.

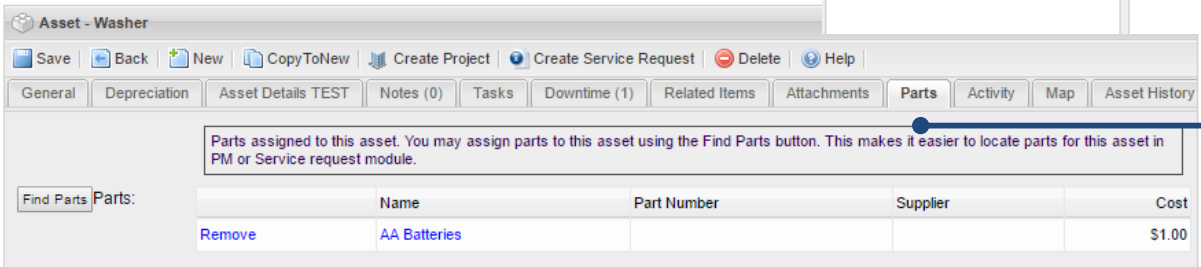


You can also access scheduled PM Events, open Service Requests and any Related Assets in the asset page.

Photos, manuals, drawings, or other documents can be uploaded into this Attachment tab and organized into folders.



Record and assign specific Parts that are to be utilized with the asset.



Creating Assets

Date	Updated By	Type	Activity
2017-05-17 11:45:44	Mary Dollano	Update	Field Purchase Cost changed from: '3500.00' to: '10500.00'
2017-05-17 11:45:44	Mary Dollano	Update	Field Warranty Expires set to: 2037-03-15

The system tracks the changes that have been made to the general information about the asset and if necessary, allows you to add a comment as to why the changes have been made.

Washer	PM's	SR's	Projects
	4	0	0

Place a pin or marker on a map to show geographically where the asset is located. Add a label or draw the shape of the asset to capture the overall size of area. Examples of where this is helpful would be roof coverings or lateral assets such as parking lots, roads and sidewalks.

PM Event	Scheduled Date	Attach...	Assigned To	Buildings	Asset
88149	2017-03-01		Mary Dollano (yahoo)	HSC Bldg 1	Washer
88147	2017-02-01			HSC Bldg 1	Washer
88146	2017-01-01			HSC Bldg 1	Washer
88145	2016-12-01			HSC Bldg 1	Washer

Easily see the performance and history of the asset from this tab.

View the **Life Cycle Summary**, list of Completed **PM Events**, Closed **Service Request** against the asset, **PM/SR Cost** items, and any **Projects** scheduled or completed for the asset.

Create Preventative Maintenance Task:

Create PM Task

A task is a maintenance procedure performed against an asset or a collection of alike assets. The event is when the task is scheduled to be performed.

The image displays two screenshots of a software interface. The top screenshot shows the 'PM / PM Home' page with a calendar view. A 'PM' drop-down menu is open, showing options like 'Tasks', 'Task Templates', 'Events', etc. A blue callout box points to the 'Add' button in the 'Tasks' sub-menu, stating: 'To create a task and generate a schedule of events, select the **Add New PM Task** from the Quick Links on the left Navigator bar or from the PM drop down menu in the menu bar.' The bottom screenshot shows the 'PM / Asset - Washer' page. A tree view on the left shows the facility structure, with 'Cabinets' selected. A blue callout box points to the 'Add' button in the 'Tasks' table, stating: 'A task can also be created in the asset page. Select an asset in the Facility Tree. Then go to the **Task** tab and select the **Add** button.'

PM / PM Home

Welcome to Asset

Sun	Mon	Tue
30	1	2
17 PMs	37 PMs	22
7	8	9
17 PMs	24 PMs	20
14	15	16
18 PMs	22 PMs	21
21	22	23
18 PMs	22 PMs	21 PMs
20 PMs	18 PMs	18
18 PMs		
28	29	30
	31	1
	2	3

PM / Asset - Washer

Asset - Washer

Save Back New CopyToNew Create Project Create Service Request Delete Help

General Depreciation Asset Details TEST Notes (0) **Tasks** Downtime (1) Related Items Attachments Parts Activity Map

Tasks:	Task	Summary	Schedule	Last Completed
Add	TSK49	Test Boiler	day 1 of every 3 months at 08:00 starting on 2017-05-07	2017-03-31

Create PM Task

The task screen can be summarized in four sections: Task Details, Task Status, Summary and Procedure.

Task Details include **estimated time** and **labour costs** or **base the labour costs** on the assigned individual's labour rate. Set the schedule for the task by clicking the **Set** button.

Task Status determine whether the task needs to be active, what type of maintenance the task should be categorized along with assigning the task to the appropriate **person, group, group or contracted service or Service Provider**. Determine if a reminder for the task should be generated. The reminder will follow the preference of the assigned person or group.

The screenshot shows a 'New Task' form with the following sections and fields:

- Task Details:** Task #, Estimated Time (with a 'Hours' dropdown), Labour Rate/hr, Based on Assigned (checkbox), Estimated Labour Cost, Budget Number (dropdown), Schedule (with a 'Set' button), and Attachments.
- Task Status:** Status (dropdown, set to 'Active'), Type* (dropdown, set to 'PM'), Assigned Group (dropdown), Assigned To (dropdown), Service Provider (dropdown), Reminders (dropdown, set to 'Yes'), Created, and Last Modified.
- Summary:** A large text area for a brief description of the task.
- PM Procedure:** A large text area for a step-by-step procedure.

PM Procedure holds the step by step procedure that the organization wishes the assigned person or group to follow when completing the task.

The **Summary** area will hold a brief description of the task such as Annual Roof Inspection or Daily Boiler Check.

Create PM Task

The software is equipped with ready-built templates that provide a summary of the task and a procedure for various tasks that are typically completed against numerous types of assets.

Click on **Templates** and use the provided search tool or scroll through the list of options shown in the template window. After sourcing the template, highlight and press **Select**.

Edit the Summary or the Procedure to suit your operations practices by clicking in the field and adding or deleting existing text.

Task Template can be edited prior to creating the tasks by selecting **Tasks Templates – Find** and pressing **Find** again to produce the available list. .

Check List Items can also be set up in this section by using the **New** button.

Category	Asset Name	Summary
Equipment & Furn...	Ice Resurfacer	100 Hour Ice Resurfacer Service
	Vehicle	2000 KM Vehicle Service
Equipment & Furn...	Ice Resurfacer	400 Hour Ice Resurfacer Service
Services - Mecha...	Compressor	5,000 Hour Compressor Inspection
Services - Mecha...	Air Cooled Condensers	Annual Air Cooled Condensers Inspection
Services - Mecha...	Air Handling Unit	Annual Air Handling Unit Inspection
Services - Mecha...	Ammonia Detector	Annual Ammonia Detector Calibration
Services - Plumbing	Back Flow Preventer	Annual Back Flow Preventer Inspection

Number	Check List Item	Is Mandatory
--------	-----------------	--------------

Create PM Task

Scheduling the Task...

Dictate the frequency of the task to be performed in the **Schedule Set**. Click on the **Set** button next to Schedule.

Choose between one time, daily, weekly, monthly or yearly frequency. Each choice is equipped with further scheduling details.

Pick how often the task is to be performed such as a specific day on the calendar, a day of the week in a specific week or specific month.

Determine when the task schedule should start and enter a preferred or required time of the day for the task to start.

Press Apply to generate the schedule.

In order for the events to appear in the home page calendar, the task must be associated with an asset. If the task is created without being attached to an asset, the following reminder message will appear prompting you to find the asset or assets to connect to the task.

Record Created.
Warning: No Events will be scheduled until one or more Assets have been Assigned.

The image shows a software interface for creating a PM task. The main window is titled 'New Task' and has a 'General' tab selected. It contains fields for 'Task #', 'Estimated Time', 'Labour Rate/hr', 'Based on Assigned' (checked), 'Estimated Labour Cost', and 'Budget Number'. A 'Schedule:' field is followed by a 'Set' button. Below this are sections for 'Attachments', 'Summary', and 'PM Procedure'. An 'PM Schedule' dialog box is open over the 'Set' button. It has radio buttons for 'One Time', 'Daily', 'Weekly', 'Monthly' (selected), and 'Yearly'. Under 'Monthly', there are options for 'Day(s) 1', 'The first Monday', and 'Every' (with checkboxes for Sun-Sat). The 'Occur' section has 'every 1 month(s)' selected. At the bottom of the dialog are 'Starting from:' and 'Time: 08:00' fields, and 'Apply' and 'Cancel' buttons.

Create PM Task

Attaching an asset or multiple assets to the task schedule...

After saving the Task, the rest of the tab will become available including **Related Tab**.

PM Asset or the Building can be added to the Task.

Enter the criteria to narrow the search for the asset(s) to be part of the scheduled task.

The **Copy to New** button will let you copy some of the information from the General tab of the current PM task to a new Task form.

Highlight an asset or assets from the list generated and press **Select**.

Tip: If there is more than one asset that requires to have the same task performed against it, hold **Ctrl** key on the keyboard and select the assets you want to add then click **Select**.

The screenshot shows the 'Task 195' interface with the 'Assets' search dialog open. The dialog has a search criteria section with fields for 'Asset ID', 'Asset Name', and 'Buildings'. Below the search criteria is a table of search results with columns for 'Asset Name', 'Asset ID', 'Category', 'Facility', and 'Location'. The 'Asset ID' field in the search criteria is highlighted with a blue dot, and a line connects it to the 'Asset ID' column in the search results table. The 'Asset ID' 'A1111' in the first row of the search results is also highlighted with a blue dot, and a line connects it to the 'Asset ID' field in the search criteria. The 'Select' button at the bottom of the dialog is also highlighted with a blue dot, and a line connects it to the 'Select' button in the dialog. The 'Copy to New' button in the top toolbar is also highlighted with a blue dot, and a line connects it to the 'Copy to New' button in the dialog.

Asset Name	Asset ID	Category	Facility	Location
A1-1 SOLAR O&M...	A1111	E2020 - Movabl...	250 Davenport ...	
Adhesive (Floor M...		B1010 - Floor A...	Unit 130	
Adhesive (Floor M...		B1010 - Floor A...	250 Davenport ...	Floor 8
Adhesive (Floor M... Avegh		B1010 - Floor A...	250 Davenport ...	Floor 8
Adhesive (Floor M...		B1010 - Floor A...	Chateau Masson	hallway
Adhesive (Floor M...		B1010 - Floor A...	City Hall - Site	

Create PM Task

Assigning parts to the task...

After saving the Task, the rest of the tabs will become available including **Parts** tab

To specify which parts to use while performing the task, click on the **Add Parts** to task button.

There are various search criteria fields presented to help you source the right part(s) you wish to assign. After entering in your search criteria, press the **Search** button to see the itemized list shown below update. If not in your current inventory, it could be created from this screen as well.

You will now have the option to select a part from the inventory of parts tracked in AssetPlanner™

Specify the quantity of the part assigned to the task and press **Add /Save**.

Note: Each unique part or part number will be added to the task one at a time.

Search criteria

Name: For Buildings:

Part Number: For Location:

Supplier: For Model:

Search Parts Assigned to Asset Create New Part

Search Results. Double click or Select part and press Add/Save button.

Name	Part Number	Cost	Qty on Hand	Qty on Order	Supplier
8" x 12" MAU Filter		666.67	0	0	
Bearing Lubricant		1.00	0	0	
AA Batteries		1.00	20	0	
EL Battery Pack		5.00	14,753	0	
Generator Belt		40.00	-2,533	0	
EF Belt		20.00	-2,621	0	
Boiler Pilot Asseby		58.00	-1	0	
Boiler Gaskett		45.00	-3,852	0	
Boiler Manway Plate		143.00	10	0	
test	1	90.00	-35,241	0	
Garbage Bags 20 ...	JV2022	10.00	44	0	
Test Part		20.00	5	0	

Specify Quantity:

Add/Save Cancel

Completing a Scheduled Event:

Completing a Scheduled Event

Welcome to Asset Planner PM 7.3 (You may click a chart item or calendar below to filter the grid)

May, 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
17 PMs	37 PMs	22 PMs	19 PMs	19 PMs	17 PMs	17 PMs
7	8	9	10	11	12	13
17 PMs	24 PMs	20 PMs	21 PMs	18 PMs	18 PMs	18 PMs
14	15	16	17	18	19	20
18 PMs	22 PMs	21 PMs	20 PMs	18 PMs	19 PMs	18 PMs
21	22	23	24	25	26	27
18 PMs	22 PMs	21 PMs	20 PMs	18 PMs	18 PMs	18 PMs
28	29	30	31	1	2	3

Total effort in hours

Past Due PM Events

The Preventive Maintenance module's home page can be filtered to **All Events**, **Assigned to My Groups or Myself** and **Assigned to Me**.

Show: All Events For selected Calendar Date Complete Selected Events Assign... Modify Selected Cancel Selected Email Selected

<input type="checkbox"/>	Time	Attachments	Assigned To	Asset	WorkOrder	Summary	Service Req...
<input checked="" type="checkbox"/>	98767		44	08:00			
<input checked="" type="checkbox"/>	98259		44	08:00			
<input checked="" type="checkbox"/>	8618		36	08:00			
Buildings: HSC Bldg 1							
<input checked="" type="checkbox"/>	119541		44	08:00			
<input checked="" type="checkbox"/>	119178		44	08:00			
Buildings: Fire Station #1 - Building							
<input type="checkbox"/>	102906		44	08:00:00	Packaged Air Con...	Annual Air Compressor Inspection	
<input type="checkbox"/>	102443		44	08:00:00	Packaged Air Con...	Annual Air Compressor Inspection	
Buildings: Community Centre - Site							
<input type="checkbox"/>	85130		46	08:00:00	Community Centre...	Daily Wet / Winter Weather Site Inspection	

You can complete PM Event(s) in the home page by placing **check mark in the box** at the beginning of each event listed in the chart. When selected, the **Completed Selected Events** will become available. Click when ready to complete the PM Events.

Follow the same process to **Assign, Modify, Cancel, Email or Add Note** to one or multiple events shown in the home page.

Completing a Scheduled Event

PM Events for Wednesday May 24, 2017

Show: All Events | For selected Calendar Date | Complete Selected Events

PM Event	PM Task	Time	Attachments	Assigned To	Asset
Buildings: Public Library - Building					
<input type="checkbox"/>	98767	44	08:00		Chillers
<input type="checkbox"/>	98259	44	08:00		Chillers
<input type="checkbox"/>	8618	36	08:00		Chillers
Buildings: HSC Bldg 1					
<input type="checkbox"/>	11954	44	08:00:00		Carpets
<input type="checkbox"/>	11917	44	0		PM Event 8618
Buildings: Fire Station #1 - Building					

Callout 1: Select the **Checklist, Notes, Triggers** to make entries for this events. Option to review the **Related Assets, Cost Items, Asset History** and **Activity**.

Callout 2: Use this **Completed** button **ONLY** if no field is require to update. Completed Date field will automatically filled with the current date.

Callout 3: Change the **Status**, add **Work Order** info and enter the **Date Completed** to update the related status fields for the event.

Callout 4: Click the event number to view the full details of the PM Event.

Callout 5: Enter additional costs such as labour and tax costs related to completing the event.

Callout 6: Press the **Add** button to add a file or photo to the PM Event.

Callout 7: *Press **Save** on the top left corner of the page to save updated information for the event.

Callout 8: *Tip:* Changing the Status to Completed and pressing Save will automatically use the current date.

Event Details (PM8618 (TSK36))

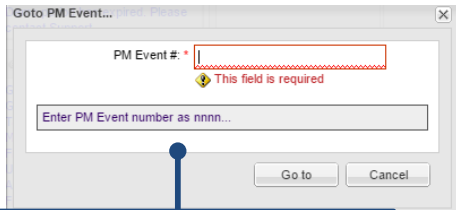
Asset: **Chillers**
Buildings: **Public Library - Building**
Location: **Public Library - Building**
Estimated Time (hrs):
Estimated Cost:
Budget Number:
Program Budget:
Actual Time:
Actual Labour Cost:
Parts Cost:
Service Provider Cost:
Other:
GST2:
GST 2:
Total Cost:

Status:
Escalated:
Type:
Assigned Group:
Assigned To:
Service Provider:
Work Order:
Scheduled Date:
Scheduled Time:
Date Completed:
Schedule: every 1 weeks on Wednesday at 08:00 starting on 2015-06-01
Last Modified:
Attachments from task:
Event Attachments:

Summary: Weekly Chiller Inspection.
PM Procedure: 1. Open the drain line on chiller.

Search Preventative Maintenance Data:

List/Search Preventative Maintenance Data



Goto PM Event... Need Help?

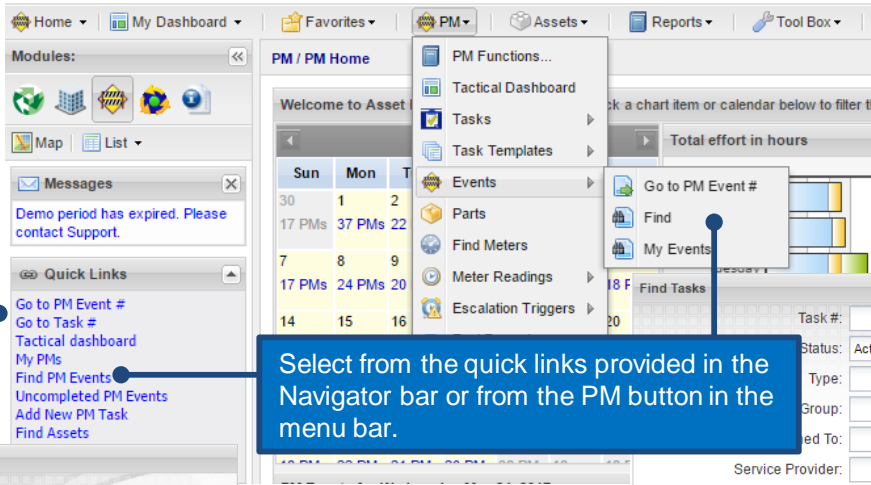
PM Event #:

This field is required

Enter PM Event number as nnnn...

Go to Cancel

If you have the Event or Task #, you can just simply use the **Go to** feature. A small window will open where you can enter your number.



Home My Dashboard Favorites PM Assets Reports Tool Box

Modules: PM / PM Home

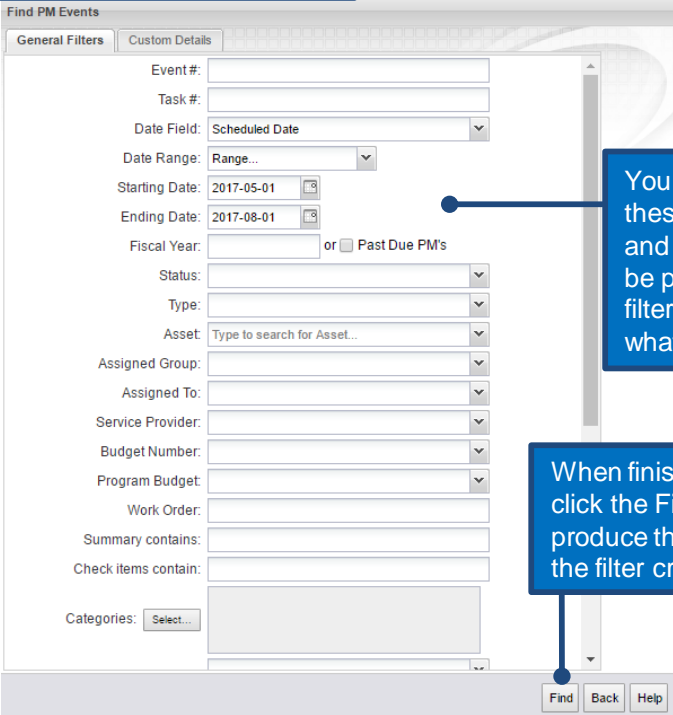
Welcome to Asset

Sun	Mon	Tue
30	1	2
17 PMs	37 PMs	22
7	8	9
17 PMs	24 PMs	20
14	15	16

PM Functions... Tactical Dashboard Tasks Task Templates Events Parts Find Meters Meter Readings Escalation Triggers

Go to PM Event # Find My Events Find Tasks

Select from the quick links provided in the Navigator bar or from the PM button in the menu bar.



Find PM Events

General Filters Custom Details

Event #:

Task #:

Date Field: Scheduled Date

Date Range: Range...

Starting Date: 2017-05-01

Ending Date: 2017-08-01

Fiscal Year: or Past Due PM's

Status:

Type:

Asset: Type to search for Asset...

Assigned Group:

Assigned To:

Service Provider:

Budget Number:

Program Budget:

Work Order:

Summary contains:

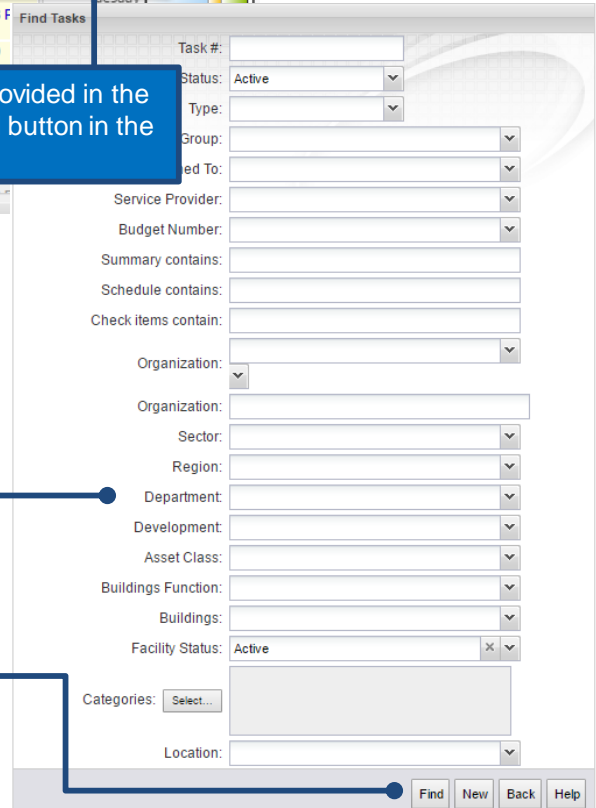
Check items contain:

Categories: Select...

Find Back Help

You will be directed to either of these two forms (**Event form** and **Task form**) where you will be provided with a number of filtering options appropriate for what you are searching for.

When finished populating the filter fields, click the Find button at the bottom to produce the list of Tasks or Events that fit the filter criteria



Task #:

Status: Active

Type:

Group:

Assigned To:

Service Provider:

Budget Number:

Summary contains:

Schedule contains:

Check items contain:

Organization:

Organization:

Sector:

Region:

Department:

Development:

Asset Class:

Buildings Function:

Buildings:

Facility Status: Active

Categories: Select...

Location:

Find New Back Help

Note: Task are *What to be done* and Events are *Assigned Tasks to be performed*.

List/Search Preventative Maintenance Data

We have now generated a list of tasks or events that can be saved as a favorite, exported, or printed.

You can sort this table by clicking on any one of the column header, such as Date.

The **Select** buttons allow the options to **modify** multiple selected items from the list.

PM Events ([Back to Find](#) or [New Search](#))

Pages: < 1 2 3 >

Select all Unselect Select between Display all Export Modify Customize

Event #	Date	Status	Asset Name	Summary	Procedure	Buildings	Assigned To
PM2331	2017-05-01	Scheduled	Fire Protection Specialties	Biweekly Fire Alarm System Inspection	1. Visual inspection only. 2. Note any irregularities or possible tampering. 3. Report any unusual circumstances to Maintenance.	Centennial apartments	Jeff Lipkewich
PM7310	2017-05-01	Scheduled	Domestic Water Heaters	Monthly Domestic Water Heater Inspection	1. Operate the safety relief valves manually by means of the try lever. 2. Pull relief valve make sure it is free, clear. Maintenance if a problem with safety relief valve.	Centennial apartments	
PM7896	2017-05-01	Scheduled	Emergency Generator	Monthly Emergency Generator Inspection	1. Start unit. 2. Let run for 5 to 10 mins. 3. Check all fluid levels. 4. Check belts. 5. Read and record meter readings. 6. Look, listen and touch for any unusual conditions, noises or vibrations and take the necessary corrective steps.		
PM71952	2017-05-01	Scheduled	Boiler	Test 3	1. Test 3.1 2. Test 3.2		
PM98721	2017-05-01	Scheduled	Packaged Air Conditioning Units	Annual Air Compressor Inspection	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.	Fire Station #1 - Building	

The first column contains **hyperlink** to take you to the detailed view of the event.

Export will produce an excel version of the data.

The **Customize** button allows you to add or remove different columns of information to you table.

List Preventative Maintenance Data – Customize Columns

Customize Columns can be used to add or remove columns from your table.

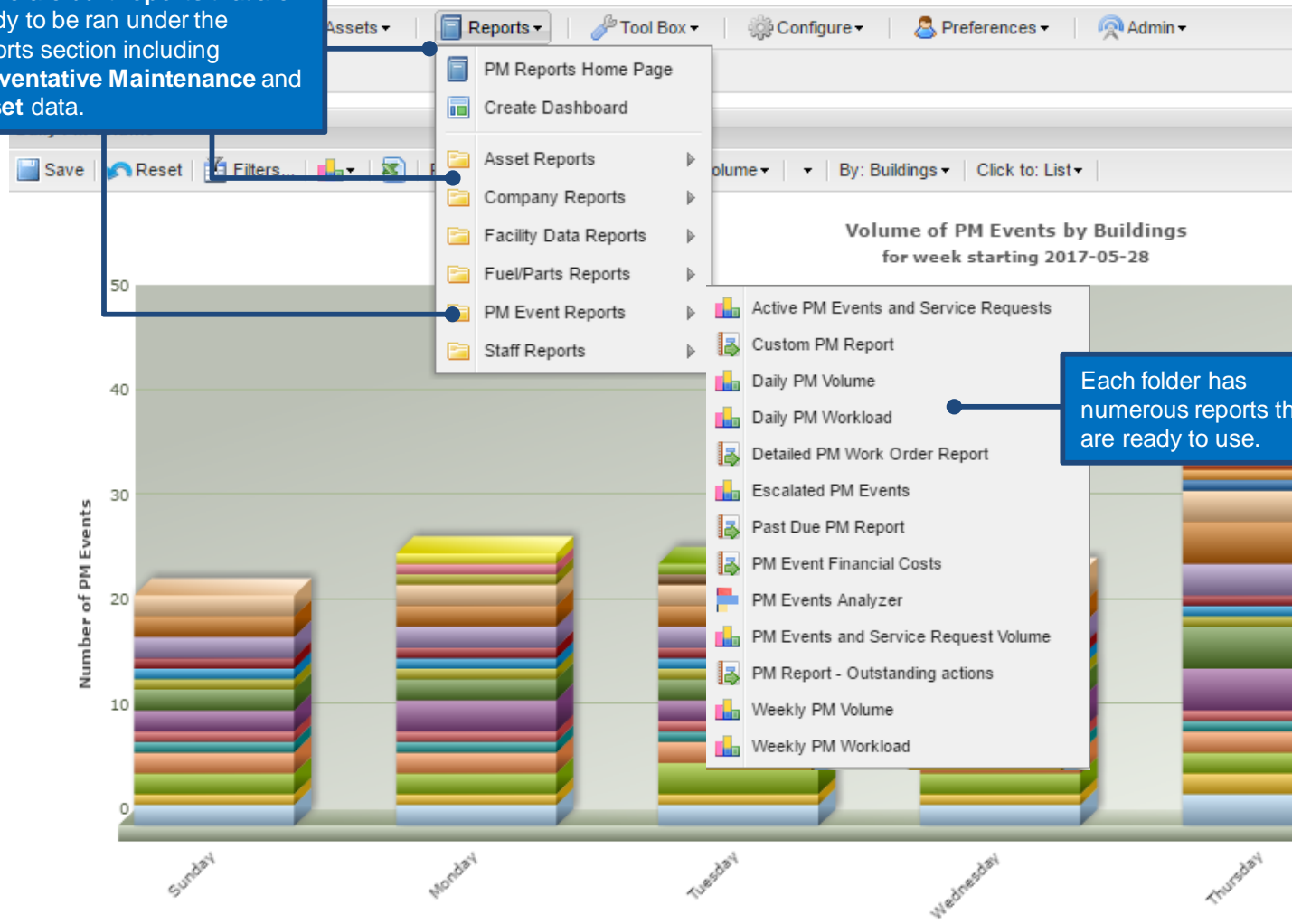
The screenshot shows the 'Customize Columns' dialog box with the following components and callouts:

- Columns to Display:** A list of columns currently shown in the table, including Event #, Date, Status, Asset Name, Summary, Procedure, Buildings, and Assigned To. A callout points to this list: "Items listed here are columns that are displayed in your table."
- Columns Available:** A list of columns that can be added to the table, including Actual Labour Cost, Actual Time, AssetID, Assigned Group, Attachment, Block, Budget Item, Budget Number, Category, City, Created, Date Completed, Department, Development, and Escalated. A callout points to this list: "Items listed here are the columns available for you to include in your table."
- Navigation:** Between the two lists are buttons for '<< Add' and 'Remove >>'. A callout explains: "Use the **Add** and **Remove** button to move an item from left to right and right to left. **Highlight** the item that you wish to move first before you press the Add or Remove button."
- Ordering:** To the left of the 'Columns to Display' list are 'Up' and 'Down' arrow buttons. A callout explains: "Use the arrow **Up** and **Down** to change the order of which columns appear in your table."
- Defaults:** At the bottom, there are sections for 'Company Wide Defaults' and 'Personal Defaults', each with 'Save' and 'Reset to Default' buttons. A callout points to the 'Save' button: "Press the **Save** button when changes are done."
- Note:** A note at the bottom right states: "Note: company defaults for this form, are only used for users that have not configured any personal defaults. If you wish all users to use the new company defaults for this form you must check the box to reset their settings." Below the note is a checkbox labeled "Reset all users settings for this form".

Reports and Charts:

Reports

There are built reports that are ready to be ran under the reports section including Preventative Maintenance and Asset data.



Each folder has numerous reports that are ready to use.

Note: To run a report, simply navigate to the report of your choice and click on the report title.

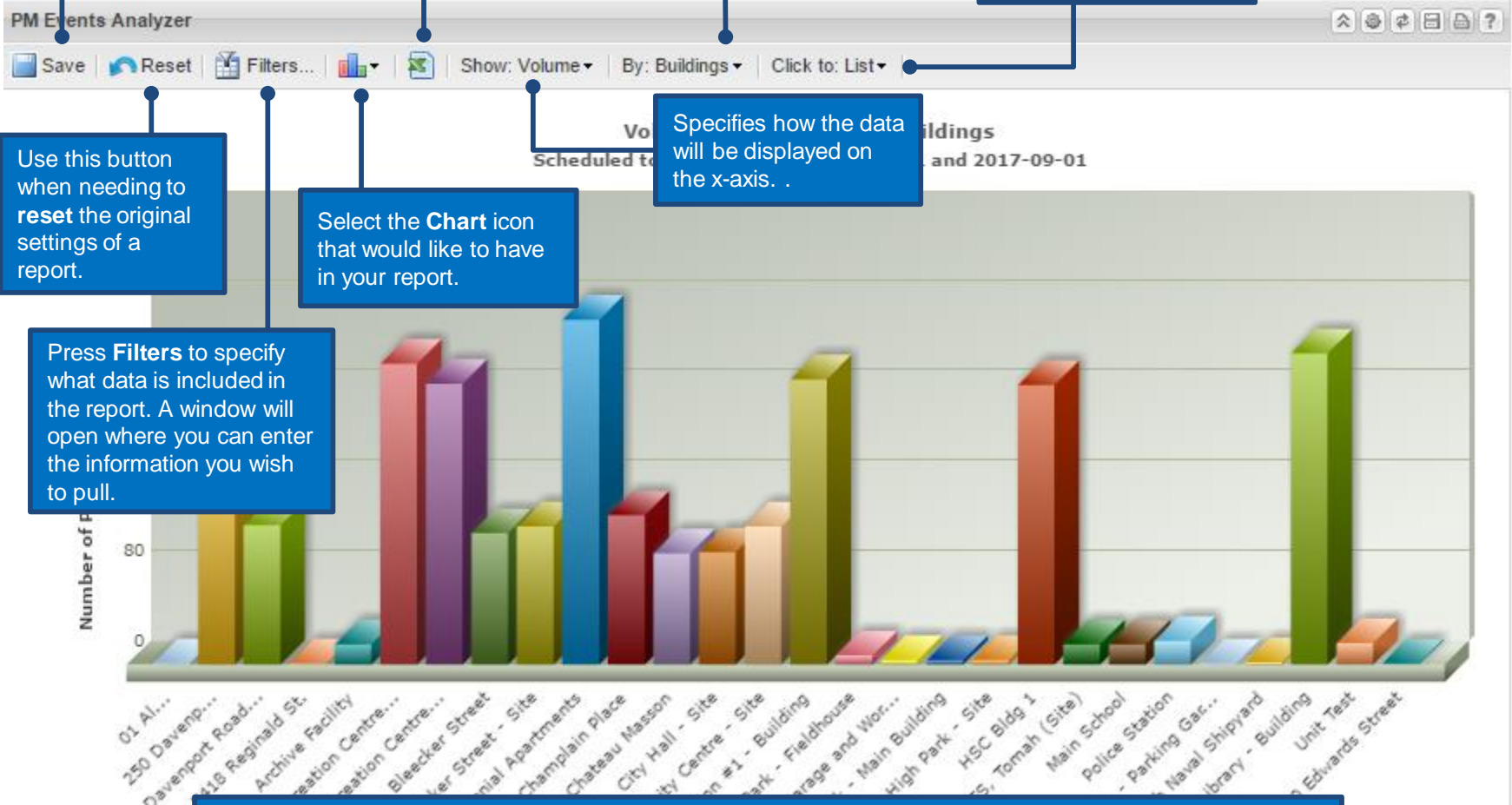
Reports

The **save** button will allow you to save your report as a personal report for only you to access or a company report to share with you colleagues.

Use this **Excel** icon to export the data.

Specifies what data is displayed on the y-axis.

Determines the level of details to show when clicking on any one of the bars on the graph.



Use this button when needing to **reset** the original settings of a report.

Select the **Chart** icon that would like to have in your report.

Press **Filters** to specify what data is included in the report. A window will open where you can enter the information you wish to pull.

Specifies how the data will be displayed on the x-axis.

Tip: Specify a custom title and description in order to remember what filters were applied to a saved report.

Reports – Additional Settings

The screenshot shows the 'PM Events Analyzer' application window. The main view is a 3D bar chart titled 'Volume of PM Events by Building'. The y-axis is labeled 'Number of PM Events' and ranges from 0 to 40. The x-axis lists various buildings, with '110 Edwards Street' having the highest volume. A 'Chart Settings' dialog box is open, showing options for 'General Settings' and 'Advanced Settings'. The 'General Settings' tab is active, displaying fields for Report Title, Description, Chart Title, Subtitle, Chart Type (set to Column3D), Show values (set to Auto), Legend (set to Auto), Font Size (set to Default (10 point)), and Scope (set to System (System Report)).

Annotations with callout boxes provide instructions:

- Customize whether or not your report shows values, a legend and the font size.
- Press **Filters** to specify what data is included in the report. A window will open where you can enter the information you wish to pull.
- Save the char as a .jpg image.
- Print just the chart.

Tip: Specify a custom title and description in order to remember what filters were applied to a saved report.

Dashboards:

Dashboards

Dashboards allow you to quickly and easily access 2-6 of your favorite reports all on a single page.

The screenshot displays the Asset Planner dashboard interface. At the top, there is a navigation bar with menus for Home, My Dashboard, Favorites, Service Requests, Bulletins, Assets, Reports, Tool Box, and Configure. Below this is a 'Modules' section with a 'Re-select or remove My Dashboard' dialog box open. The dialog box contains the following text:

Select an existing dashboard to display as My Dashboard

You may select a dashboard to display as your initial starting page. It will also be accessible by pressing the "My Dashboard" menu button.

Please select a dashboard from the list below and press Select or press Create to create a new dashboard.

Title	Scope	Description
Anita's Dashboard	Company	
E&S Dashboard	Company	
Needs Review Dashboard	Company	
PM & SR Dashboard	Company	

At the bottom of the dialog box, there are three buttons: 'Set as home Dashboard', 'Remove home Dashboard', and 'Create a new Dashboard'.

The main dashboard area shows two report windows. The left window is titled 'PM Events Analyzer' and displays a bar chart titled 'PM Workload Effort by Buildings Scheduled to start between 2017-06-01 and'. The right window is titled 'Analyzer' and displays a bar chart titled 'Service Request Volume by Buildings Created between 2016-06-01 and 2017-06-03'. A 'History' section on the left side of the dashboard lists recent service requests and tasks.

https://van.assetplanner.com/dashboard?home=1&RepID=-1

Re-select your default dashboard or create a new dashboard customizing the layout and choosing to include all your favorite charts.