

AiM™ 9.1

# Property Management Training

AssetWORKS

AssetWorks AiM version 9.1 is an Integrated Work Management System (IWMS) software designed to provide facilities management solutions. This training is an overview of some of the most used functions and functionalities that AssetWorks AiM has to offer relating to Property Management processes.

For more details or help, reference the **AiM 9.1 Reference Guide Real Estate** manual.

## Notes

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# Agenda

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## Part 1

- Goals of Training
- Core Concepts
- Data Standards
  - ✓ *Property Standards*
  - ✓ *Location Standards*
  - ✓ *Asset Standards*

**Part 1** of this training will cover basic Property management concepts, data standards and general navigation of the AiM system.

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# Agenda

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## Part 2

- Property
  - ✓ *Property Business Processes*
  - ✓ *Property Module*

**Part 2** of this training will cover individual processes related to Property Management.

The processes will cover how to add and update Property records into the system, Property and Locations, as well as reporting capabilities for monitoring and managing properties.

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# Agenda

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## Part 3

- Asset Management
  - ✓ *Asset Management Business Processes*
  - ✓ *Asset Module*

**Part 3** of this training will cover individual processes related to Asset Management.

The processes will cover how to add and update Property and Location Assets, as well as reporting capabilities for monitoring and managing properties.

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# Agenda

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## Part 4

- Pre-Defined Screen Queries
  - ✓ *Report Listings*

**Part 4** of this training will cover individual processes related to Property Management.

The processes will reporting capabilities for monitoring and managing properties.

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## Process Breakdown

Section / Security Roll	Space Manager	Supervisor/ Director	Students Assistant	Space Users
AiM-CAD	✓	✓	✓	✓
Asset Manager	✓	✓		
Space Manager	✓	✓		
Space Read Only				✓

The processes covered in this training will apply to certain roles and responsibilities in the UCONN University Planning, Design, and Construction group (UPDC).

The process breakdown shows a high-level summary of the processes that relate to each role between Space Manager, Space Supervisors, Directors, and Students Operations to highlight areas of interest for each group. Space Users will be able to view data and run pre-defined reports.

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## Part 1: Core Concepts and Data Standards

**Part 1** reviews the core concepts and the data standards for the AiM Property Management training.

The core concepts section includes details on:

- ***Classifying Types of Property/Locations***

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## Goals of Training

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- Emphasize Workflow of Information
- Align Use of AiM with Workflow Processes
- Improve Accuracy of Data
- Improve Consistency of Workflow of Information

...to make strategic data-driven decisions...

We are here today because the University has made an investment in an Integrated Work Management System (IWMS) that can help make strategic data-driven facilities decisions.

In order to make these decisions, the information within the system has to not only be accurate, but also configured in a way that provides the information needed to generate the reports necessary for making these decisions.

While this system can hold a lot of information, the intent is not to collect as much as possible, but to limit the data collection to the right information, information that is valuable to facilities decision making.

The following page gives an overview of your role in achieving these goals.

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## Core Concepts

### Improve AiM's Information to Drive Decisions

- Geographical Grouping of Properties
  - Region
  - Campus
- Property/Location Statuses
- Link to Assets

In this section, we will review the data standards that have been established for use in the AiM system.

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## Property Management Data Standards

### *List of Standard Data Fields in AiM*

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- **Property Information:** Region, Campus, Property, Property Status, Square Footage, Date Built, Address, Owned/Leased, and Aliases.
- **Location Information:** Organizational Ownership, Location Type, Primary Usage, Status, Space Type, and Square Footage.
- **Asset Management:** Asset Classification, Asset Type, Asset Groups, Asset Status, and Attributes. Attributes such as, Seating Capacity, Technology Type, Room Refresh Year and ADA compliant.

Uconn has developed data standards for input fields in AiM related to Property Management and Asset Management. These standards define the configuration of data for the Property/Location Information to help you select a value from a provided list, rather than free text fields.

#### ***Why use data standards?***

- Provide Guidance on Naming Conventions
- Increase Quality of Data
- Optimize System Performance
- Enables Better Reporting

The use of standard lists discourages unnecessary variation in the data that occurs when free text fields are used. Having a defined list of options for input fields allows queries to run successfully and ultimately generate meaningful reports.

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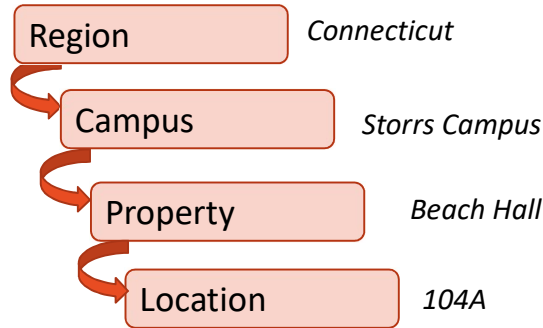
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# Property Standards

## Property Hierarchy

- The Property Hierarchy groups locations into 4 levels. Region and Campus are Geographical groupings of Properties.
- The example below shows the hierarchy for Beach Hall.



The property hierarchy includes 4 levels. The region code is first set up and then Campus are associated to regions. Properties are then associated to Campuses and finally locations are associated to properties.

Uconn has set up the fields as follows:

- **Region** – Connecticut is the Region in each scenario
- **Campus** – The Facility standards are divided by Campus (Storrs, Hartford, Stamford, etc.)
- **Property** – The Property options are divided into buildings or areas under each Campus (i.e. Storrs Hall, Hawley Armory, Softball Dugout)
- **Location** – The Location information is identified in each Phase and is linked to the Property selected for the parent work order. The locations are listed by room number (100, 100A, 110B)

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## Defining Property

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- Property Id:

*The Property Id is a 4 digit building number and assign by UPDC Space Manger.*

- Property Description:

*The property description is the official name of the property.*

- Property Address:

*The official physical address of a property.*

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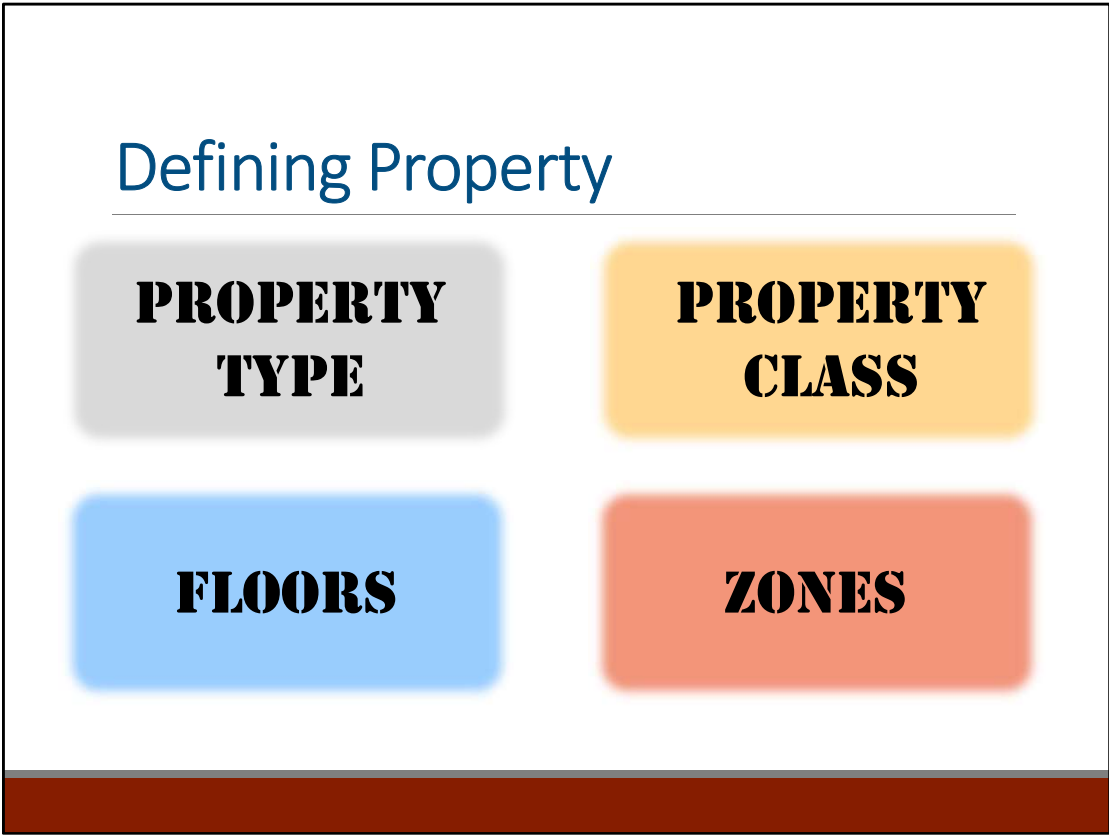
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**Benefits of categorizing:** Reporting abilities, accurate analysis, resource allocation, and telling your story.

**Why must we not only categorize properties, but be consistent about it?**

Categorizing accurately brings data for reporting, analysis, resource allocation decisions and also the ability to tell your story. Analyzing data that categorizes the Property consistently can help identify potential challenges and opportunities to determine the mix that works successfully for UConn.

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## Defining Property

### **PROPERTY TYPE**

The property type is used as a tool to define, normally for reporting purposes, a property's primary function.

Note: Property Types to be recommended by FEA and adopted by the university.

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## Defining Property

### **PROPERTY CLASS**

The property class is a reporting element and further classifies the property.

Note: Property Classes to be recommended by FEA and adopted by the university.

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## Defining Property

### **FLOORS**

The Floors Screen identifies the floors for a property. Floor square footage will automatically be populated from the polyline AutoCAD drawings

Note: Roofs will be defined as a floor. This will facilitate the ability to attach a roof floor plan.

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## Defining Property

### ZONES

The Zones View identifies the zone type and zone code associated with the location. Zones are used to group locations with similar identifying attributes (i.e., geographical, political, hazard, or other common attributes).

Note: Historic and Depot zones will be used. More Zones may be defined in the future.

**Historic Zone:** denotes if a property is Historical or not.

**Depot Zone:** denotes the properties on the Storrs campus that are a part of the Depot area.

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## Defining Property

- Property Status

*Defines the state of a property at any given point in time.*

Property Status Codes	Description
OCCUPIED	Occupied Property (Can be used on records throughout the IWMS system)
VACANT	Vacant Property (Can be used on records throughout the IWMS system)
MOTHBALLED	Mothballed Property (Can be used on records throughout the IWMS system)
INACTIVE	Inactive Property (Can not be used on records throughout the IWMS System)
DEMOLISHED	Demolished Property (Can not be used on records throughout the IWMS System)

Note: Statues to be recommended by FEA and adopted by the university.

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<b>Location Standards</b>

*Location Standards*

<b>Notes</b>

## Defining Location

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- Location Description:

*The Location description is the description of the Location Type. The Location Type will be the FICM code.*

**FICM**

The Post Secondary Higher Education Facility Inventory Classification Manual.

FICM 110 – Classroom Space

FICM 310 – Office Space

FICM 250 – Research Space

### Notes

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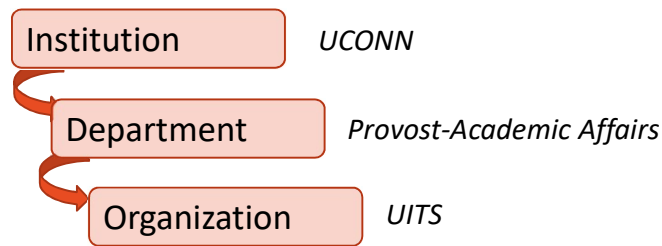
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## Location Standards

### *Organizational Hierarchy*

- What Organizations is in what location.
- The example below shows the Organizational Hierarchy for a “Owner” of a location from the Athletics group



The organizational hierarchy setup is based on the organizational structure of UConn. The institution code is first set up, which has departments associated to it. Organizations are then associated to departments and finally requestors are associated to organizations.

UConn has set up the fields as follows:

- **Institution** – The University of Connecticut is the Institution in each scenario
- **Department** – The Departments are divided into the groups of President, Provost Academic Affairs, Exec VP Admin, and CFO
- **Organization** – The Organizations are divided into groups under each of the Departments (i.e. UITs, Allied Health Services, Music)

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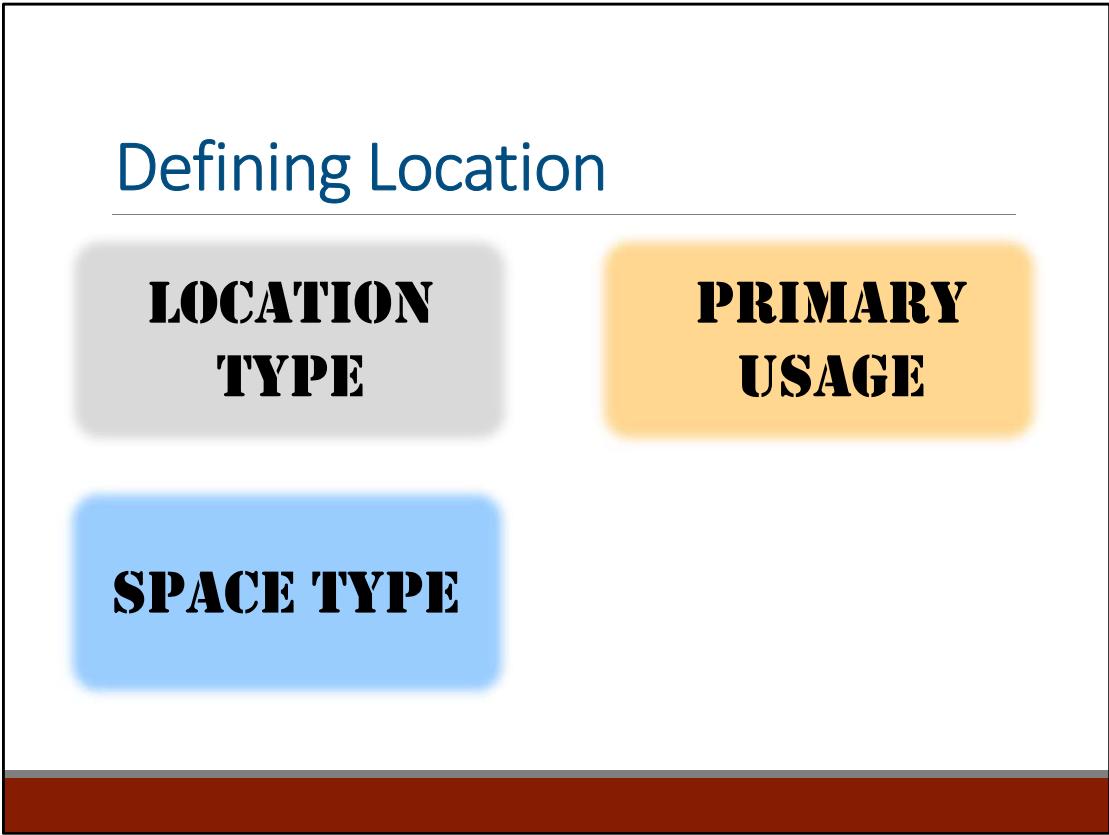
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**Benefits of categorizing:** Reporting abilities, accurate analysis, resource allocation, and telling your story.

**Why must we not only categorize properties, but be consistent about it?**

Categorizing accurately brings data for reporting, analysis, resource allocation decisions and also the ability to tell your story. Analyzing data that categorizes the Location consistently can help identify potential challenges and opportunities to determine the mix that works successfully for UConn.

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## Defining Location

### **LOCATION TYPE**

The Location type is used as a tool to define, normally for reporting purposes, a kind of Place.

*The Postsecondary Education Facilities Inventory and Classification (FICM) manual room classifications will be utilized for the Location Type.*

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## Defining Location

### **PRIMARY USAGE**

Primary Usage Code, indicates by the highest in percentage ranking of its utilization by its occupants.

Note: Future use of this field is to be determined. Current values represents highest FICM percentage usage for the location.

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## Defining Location

### SPACE TYPE

The Space type indicates if a space is assignable or non-assignable.

- ✓ *Assignable designates a space can be assigned to an Organization(s).*  
*Ex: Offices, Labs, Conference Rooms*
- ✓ *Non-Assignable designates a space cannot be assigned to an Organization.*  
*Ex: Corridors, Stairs, Restrooms, Elevators*

### Notes

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## Defining Location

- Location Status

*Defines the state of a location at any given point in time.*

Property Status Codes	Description
ACTIVE	Active Location (Can be used on records throughout the IWMS system)
INACTIVE	Inactive Location (Can not be used on records throughout the IWMS System)

Note: Statuses to be recommended by FEA and adopted by the university.

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<b>Asset Standards</b>

**Notes**

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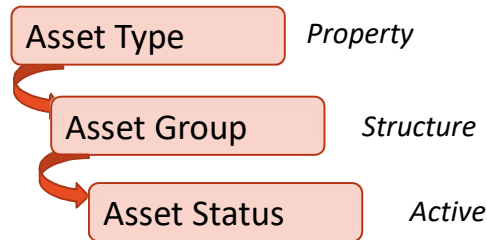
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# Asset Standards

## *Hierarchy – Property Asset*

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The asset standard hierarchy identifies the classification of the equipment that is affected by the maintenance task.

The different Work Types within AiM include the following:

- **Asset Type** – includes groups for Durable, Property, Property Component, Serialized, System, and Vehicle equipment
- **Asset Group** – To Be Determined
- **Asset Status** – includes statuses of Active, Available, Decommissioned, Offline, and Validation

### Notes

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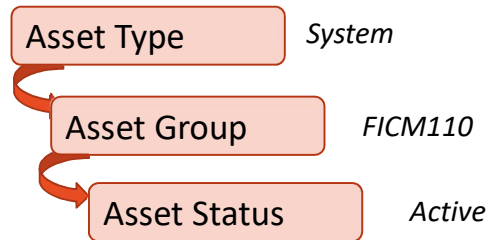
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# Asset Standards

## *Hierarchy – Location Asset*

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The asset standard hierarchy identifies the classification of the equipment that is affected by the maintenance task.

The different Work Types within AiM include the following:

- **Asset Type** – includes groups for Durable, Property, Property Component, Serialized, System, and Vehicle equipment
- **Asset Group** – includes FICM110 for classrooms and FICM900 for residential
- **Asset Status** – includes statuses of Active, Available, Decommissioned, Offline, and Validation

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# Asset Standards

## Attributes – Location Asset

Attributes facilitate the tracking of additional property information.

### FICM110 - Attributes

- Technology Install Year
- Air Conditioning
- Estimated Technology Upgrade Year
- Room Refresh Year
- Technology Type
- Furniture Install Year
- Wireless Wi-Fi Status
- ADA Compliant
- Furniture Type
- Seating Capacity

### FICM900 - Attributes

- Number Of Beds
- Type Of Room

## Notes

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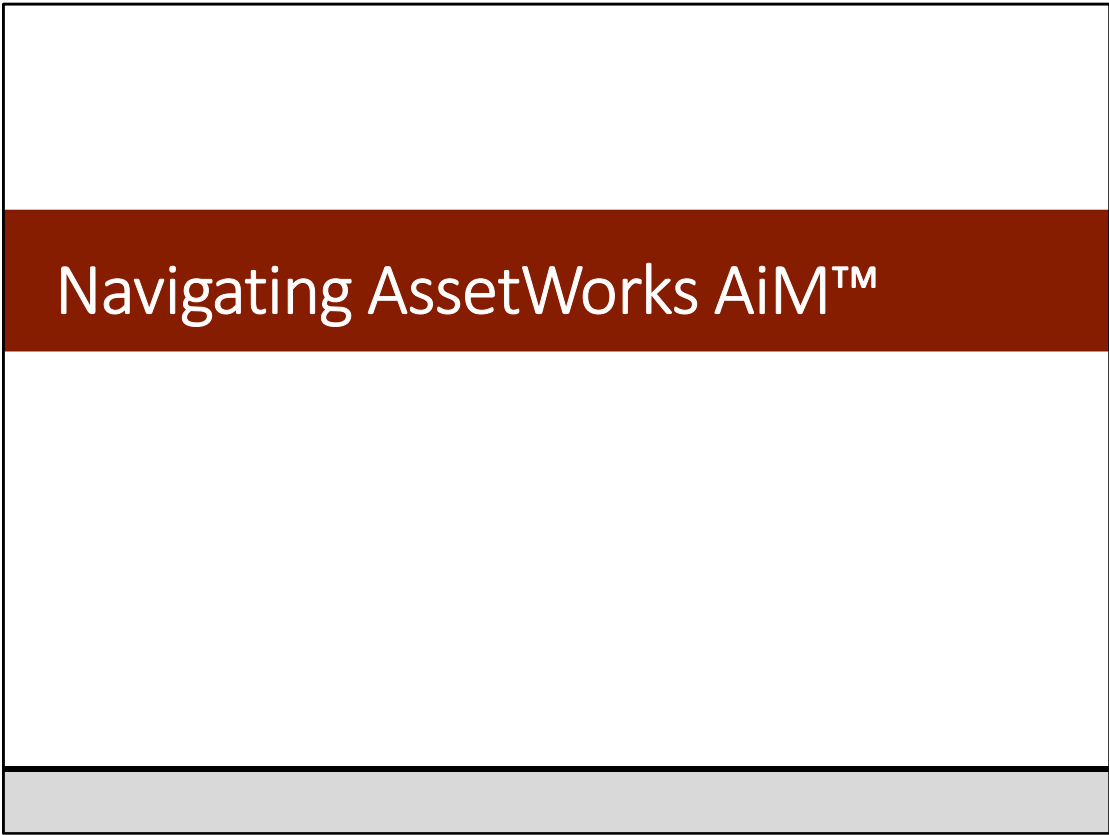
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This module covers select modules within the AiM WorkDesk. The following slides present a general introduction to the main WorkDesk screen as well as the location of the modules covered in this training.

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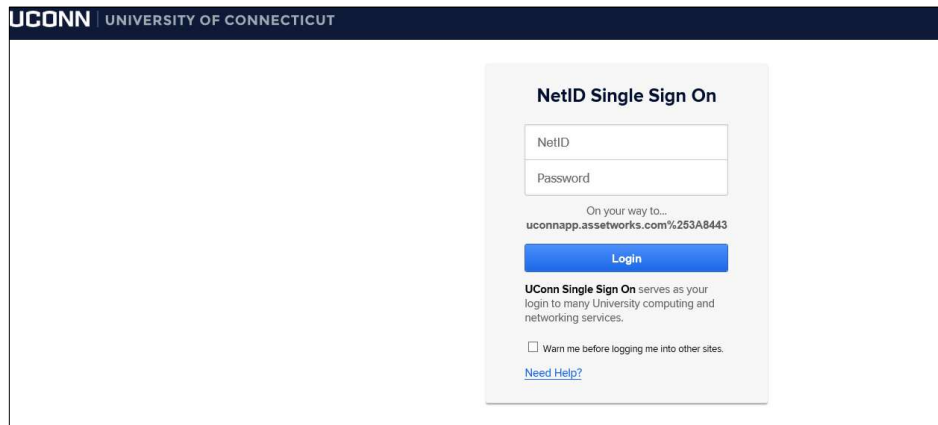
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# Log in to AiM Using Net ID



Staff will log in to the Assetworks AiM system through the NetID Single Sign On screen. Staff should use their NetID and password to access the Main WorkDesk.

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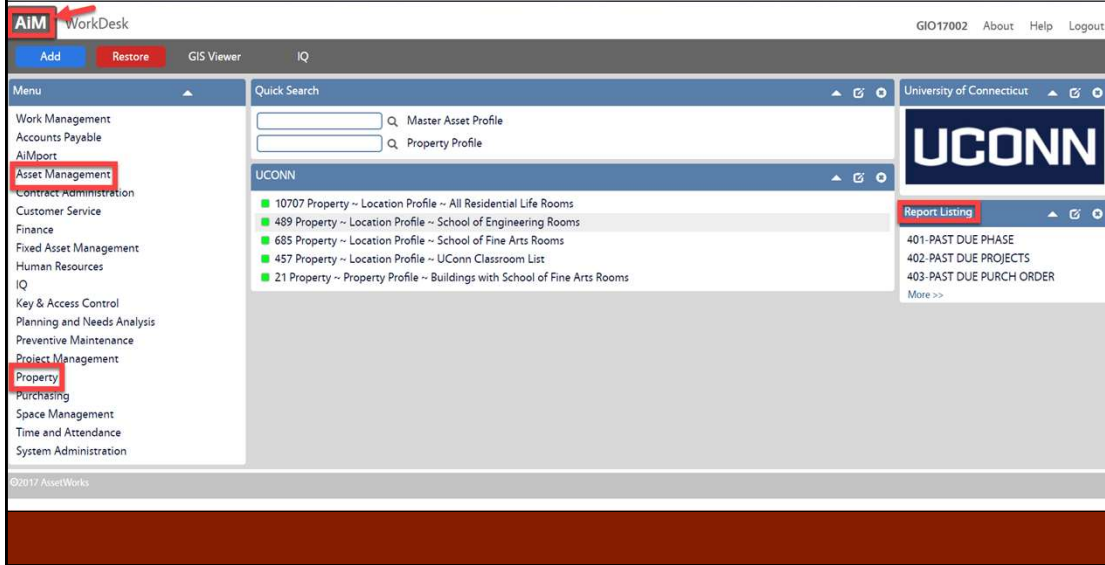
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# The Main WorkDesk™ Menu

Clicking the AiM button will bring you back to the WorkDesk™ Menu



The main WorkDesk menu contains links to each of the modules that are referenced in this training:

- **Asset Management**– used for generating Property and Location Assets.
- **Property**– used for generating and updating Property and Location Information.

The **Report Listing** section is used to provide links to pre-defined reporting queries. The full list will differ based on staff rights within the system and can be edited.

The gray AiM button can be used to return to the main WorkDesk menu from any other page in the system.

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## Part 2: Property Management

**Part 2** reviews property processes within each of the following modules:

- **Property Business Process** – *How Properties will be managed in the system.*
- **Property Module** – Property and Location Information.

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## Property Business Processes

**Part 1** reviews the core concepts and the data standards for the AiM Property Management training.

The core concepts section includes details on:

- ***Classifying Types of Property/Locations***
- ***Linking to Assets***
- ***General Navigation of AiM***

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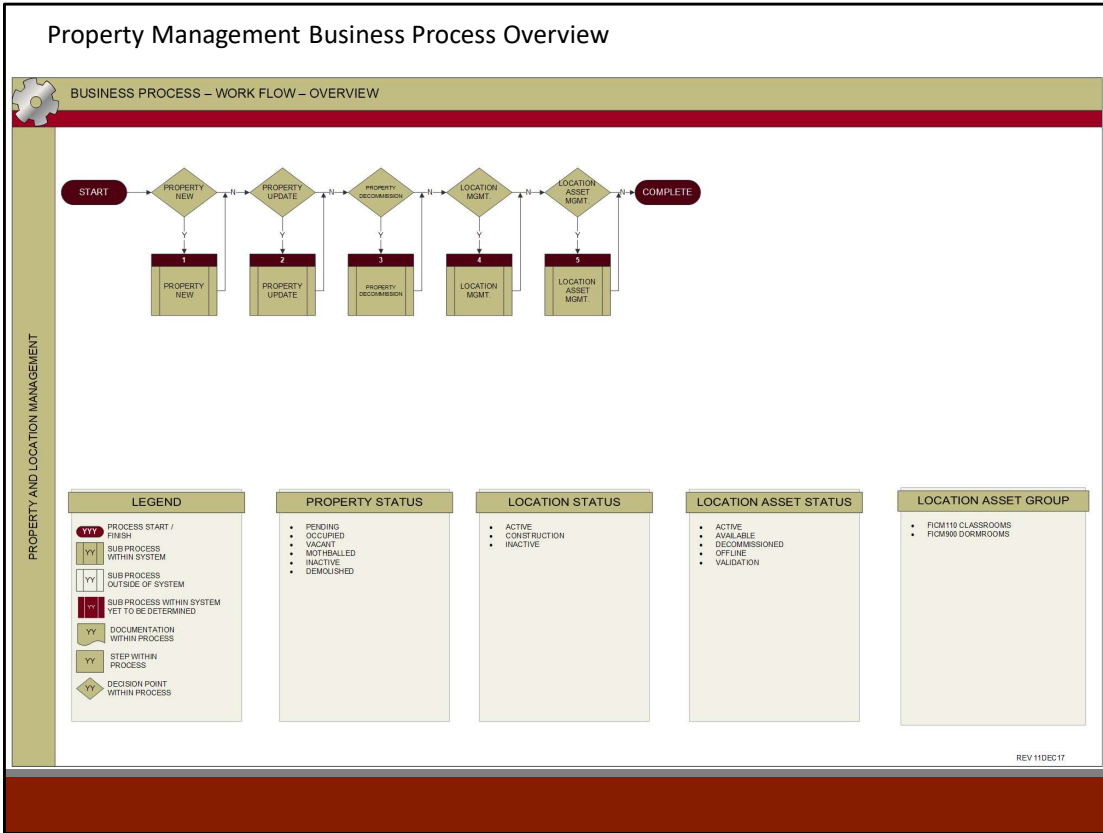
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## Property Management Business Process Overview



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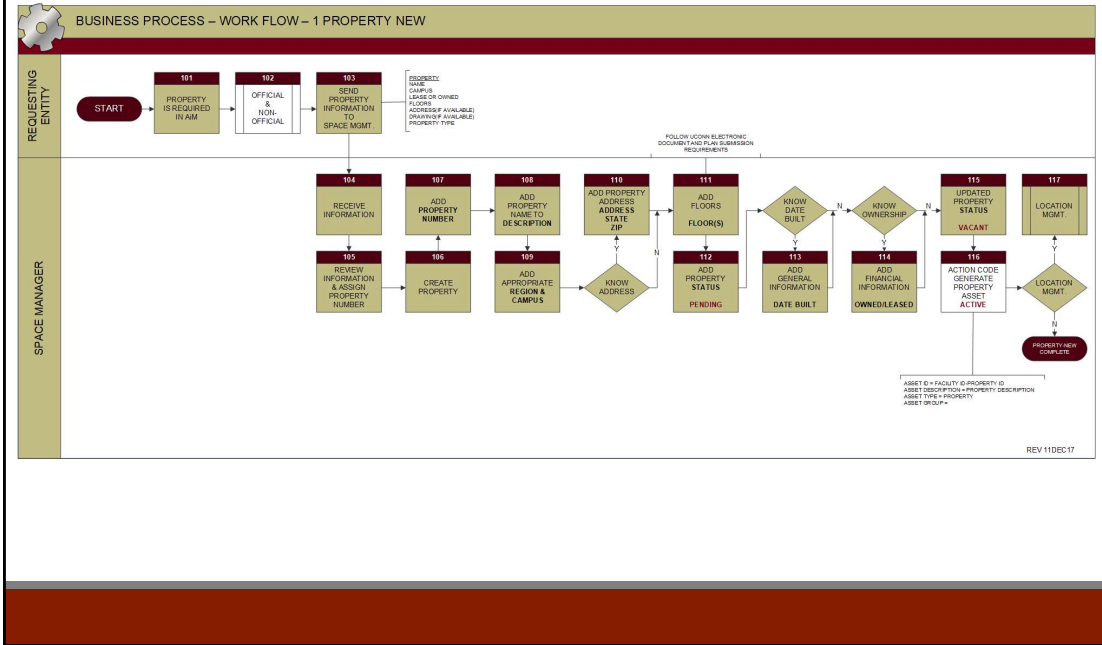


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## Adding A New Property Process



## Notes

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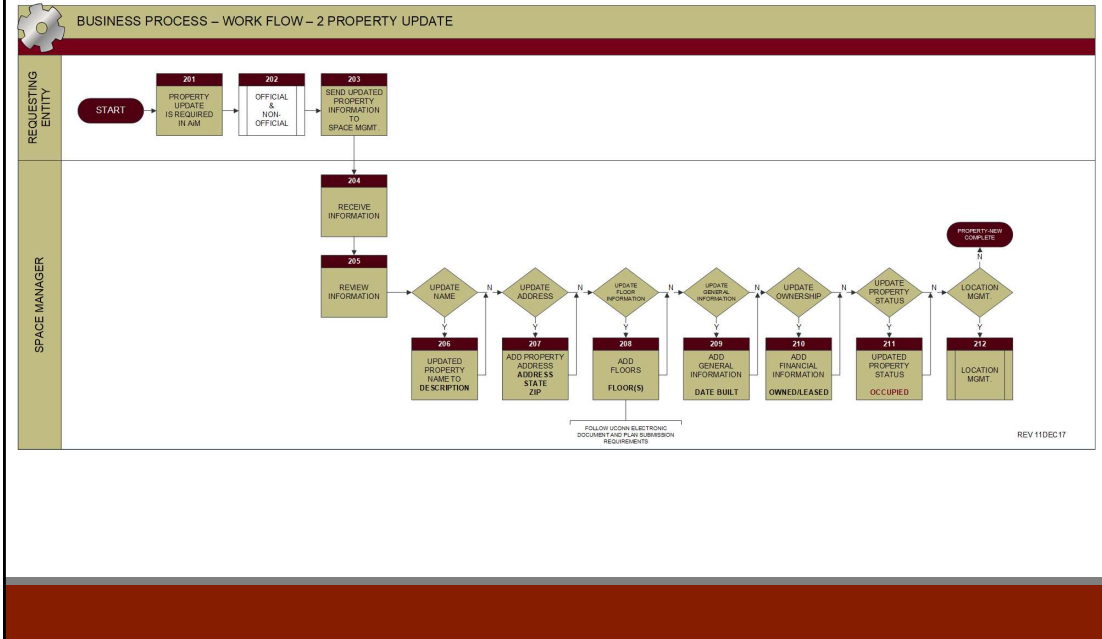


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Updating Property Information Process



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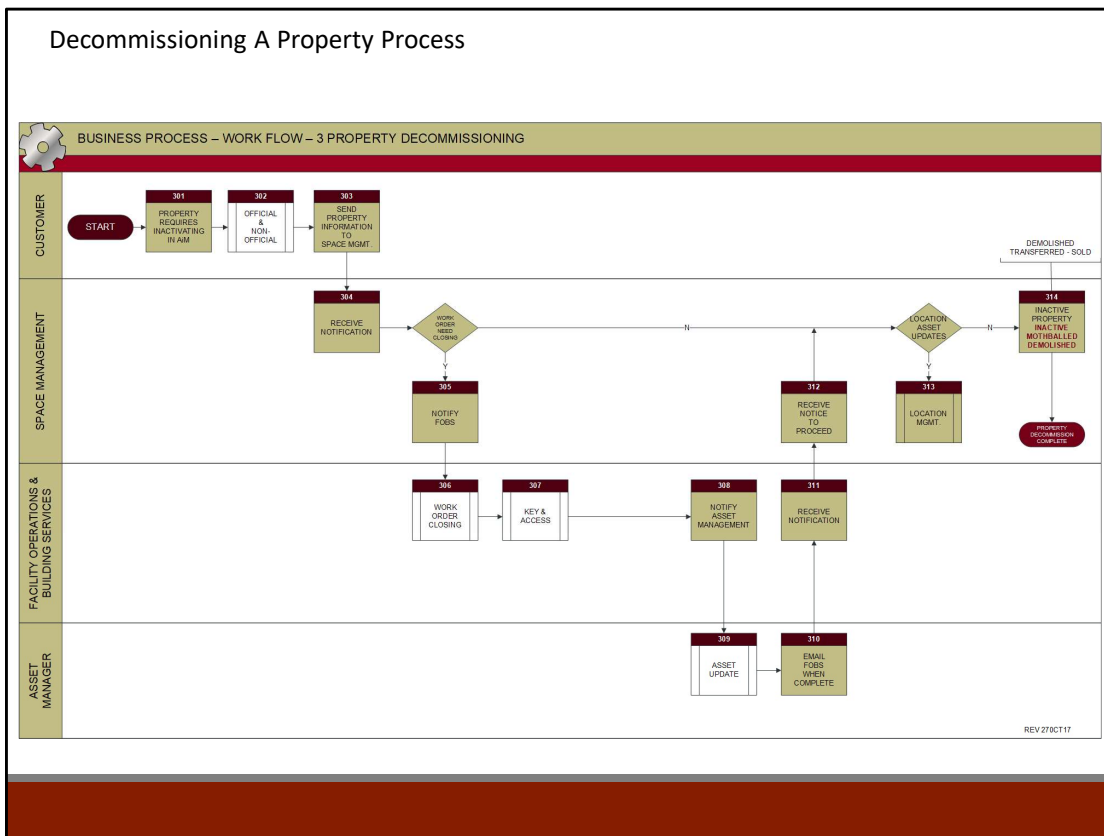
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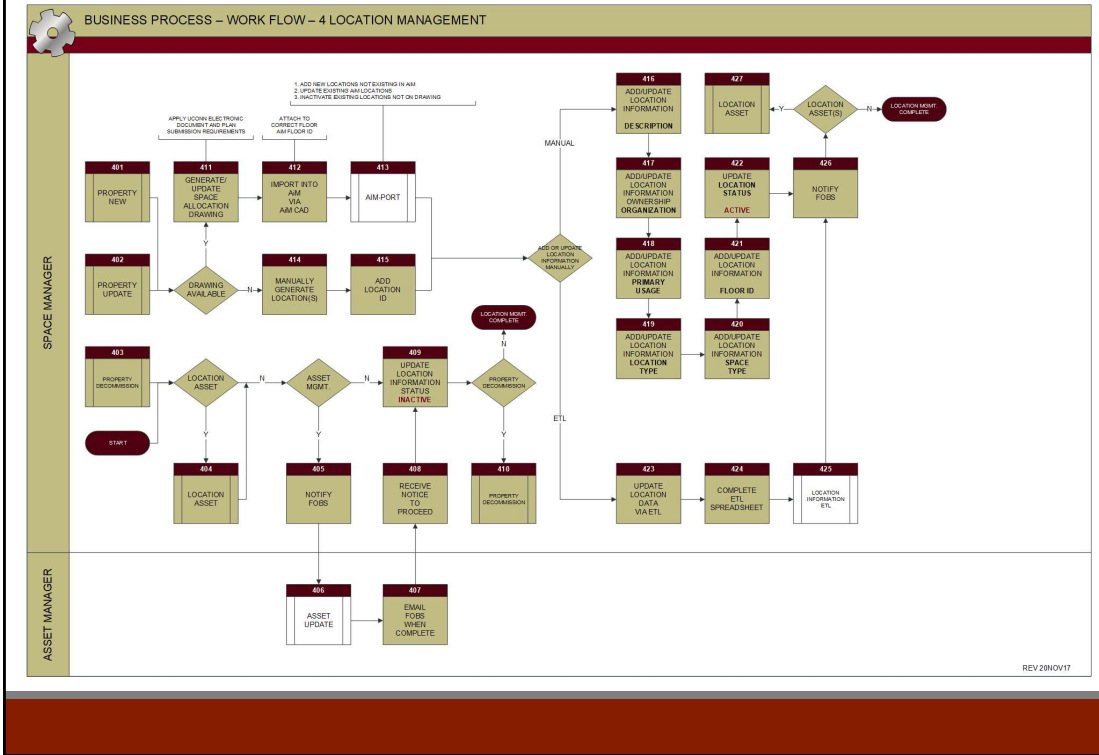
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Location Information Management Process



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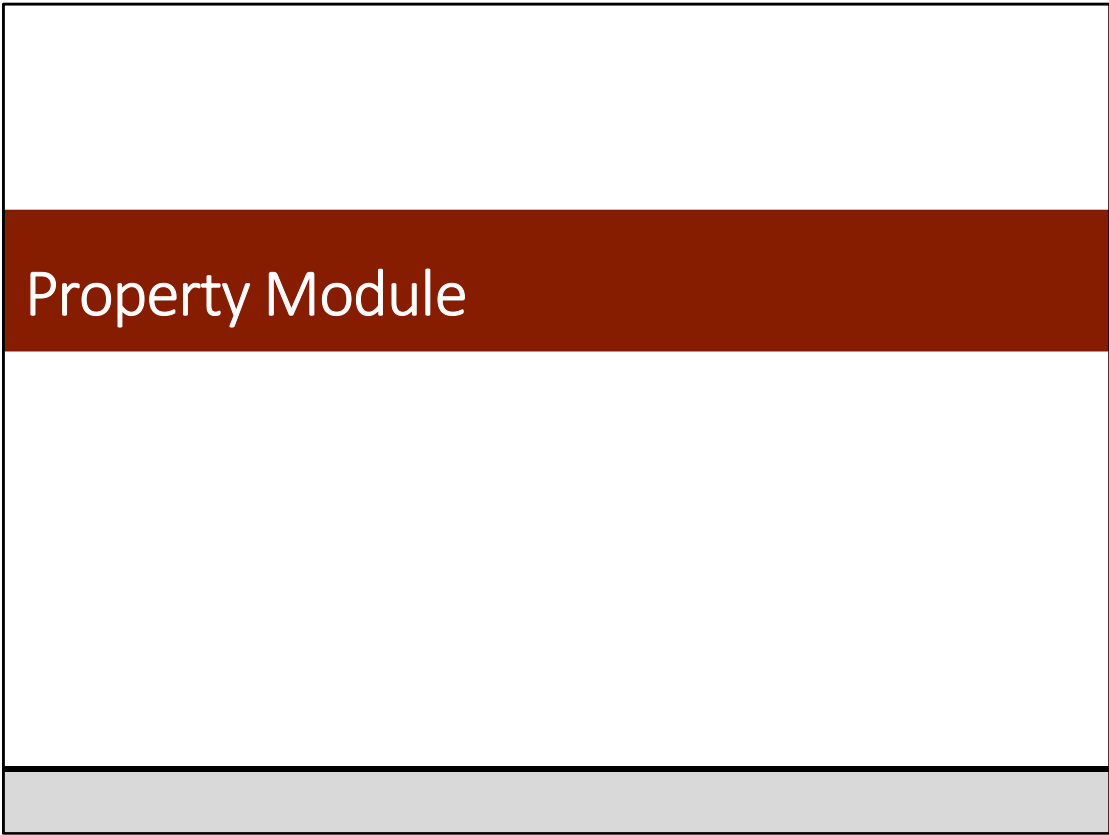
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The majority of the processes involved in this training are covered in the Property module.

The module covers processes located in the following tabs:

- Work Management Module**
- Work Order
- Phase
- Daily Assignments
- Purchase Request
- Shop Stock Transactions

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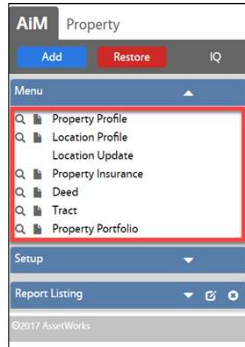
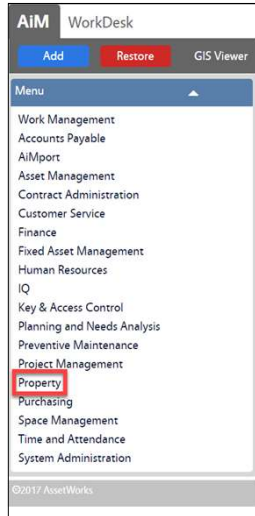
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# Property Module

## Links to All Menus



- Select the Property link from the Main WorkDesk Menu
- Links to the Property Menu

When logged in, you'll be able to see the links to each Menu in the Property module. The WorkDesk™ is configurable and will be built out for specific roles.

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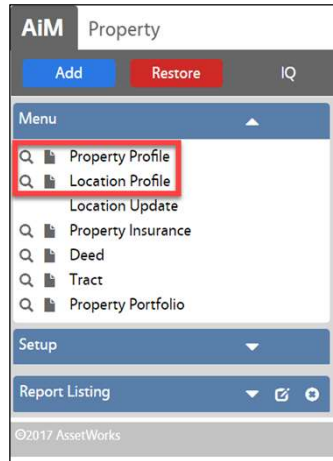
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# Property Module

## Property and Location Profile



### Property Menu:

- Enter a new property/Location
- Update an existing property/Location
- Search for existing Property/Location

Found in the Property Module, the Property Screen is the primary screen for tracking Properties in AiM.

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# Property Data Standards

## *Must Have Information*

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### PROPERTY ENTRY

- Property Number
- Property Name
- Region, Facility
- Floors
- Property Status

Filling out the Property Profile with as much information is critical for reporting. The fields listed above follow specific data standards and hierarchical relationships.

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# Enter a New Property

## Property Menu

The screenshot displays the AiM Property Module interface. On the left, the 'Property' menu is open, with 'Property Profile' highlighted in red. Below it, the 'Property Profile' sub-menu is visible, with the 'New' button highlighted in red. On the right, the 'New Property' form is shown, with several fields highlighted in red to indicate required information: a yellow header bar, the 'Region' field, the 'Campus' field, the 'Status' dropdown (set to 'PENDING'), and the 'Property Type' and 'Property Class' dropdowns. The form also includes fields for Address 1, Address 2, City, Country, State, Zip Code, and Country Code.

- Navigate to the *Property* Module
- Click the link to the *Property Profile*
- Click *New*
- The new Property record form will appear

The work order number will automatically populate.

*Note that the red highlighted cells are required fields.*

*Required fields include:*

1. *Property Identification*
2. *Region*
3. *Campus*
4. *Status*

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# Enter a New Property

## Add Property Number and Description

1. Add Property Identification Number.
2. Add Property Description - OFFICIAL PROPERTY NAME

Property Identification is a 4 digit number.  
 Property Description is the official name of the property.

Other for Notes

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

### Notes

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# Enter a New Property

## Add Property Region and Campus

3. Add Region – Will Always Be CT For CONNECTICUT.
4. Add Campus – Select Correct Campus From the list.

0001X Created By GIO17002 On 11/29/2017 08:59 PM  
Last Edited by GIO17002 On 11/29/2017 08:59 PM Edit

STATIONARY HALL

Region: CT

Connecticut

Campus: 01

Storrs Campus

Campus ↓	Description
01	Storrs Campus
02	HARTFORD REGIONAL CAMPUS
03	STAMFORD REGIONAL CAMPUS
04	TORRINGTON REGIONAL CAMPUS
05	WATERBURY REGIONAL CAMPUS
06	EVERY POINT REGIONAL CAMPUS
07	UCONN HEALTH CENTER
08	COOPERATIVE EXTENSIONS

### Notes

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

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# Enter a New Property

## Add Property Address

5. Add Property Address– Street Address, City, State, and Zip Code

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Last Edited by GIO17002 On 11/29/2017 08:59 PM

0001X

STATIONARY HALL

Region: CT

Connecticut

Campus: 01

Storrs Campus

Address 1: 231 GLENBROOK ROAD

Address 2:

City: STORRS

County:

State: CT

Zip Code: 06269

Country Code:

Status: PENDING

Property Type:

Property Class:

Note: Property Statuses to be determined. FEA will provide recommendations with the university adopting the final list.

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

### Notes

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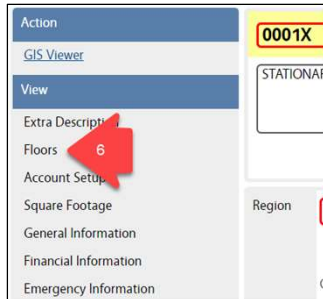


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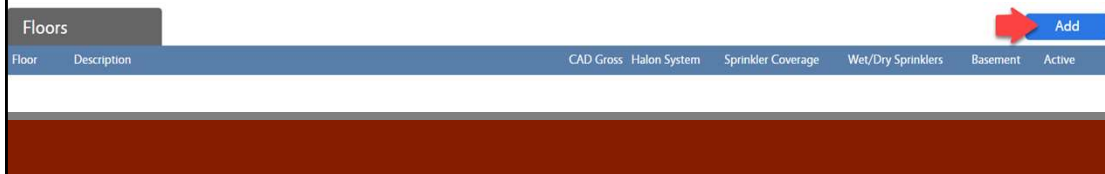
# Enter a New Property

## Add Property Floors

6. Add Floors– Select the Floors Option From the View Menu.



From the Floors Menu, Click the Add button.



### Notes

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

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# Enter a New Property

## Add Property Floors

7. Add the Floor Id.

8. Add the Floor Description.

Click the Add Button to add additional Floors. Repeat steps 7 & 8  
Click the Done Button when finished adding floors.

Floor Identification will be a 2 digit number. IE: 01, 02, 03,  
Roof

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

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### Notes

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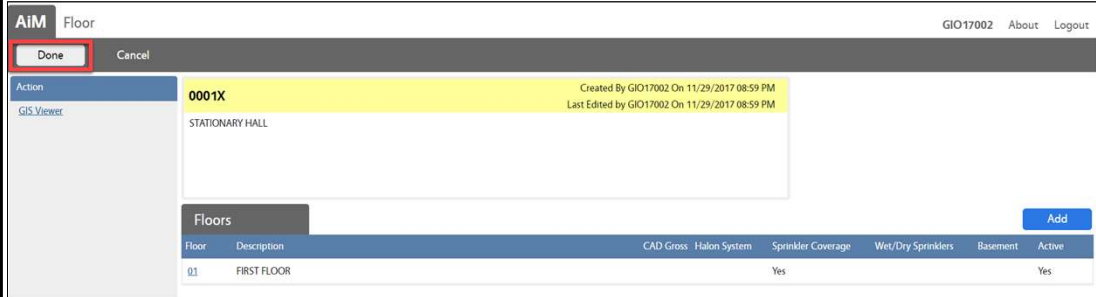
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# Enter a New Property

## Add Property Floors

Click the **Done** button, when finished adding floors.



Click the **Save** button to save the property.  
Then click the **Edit** button to continue adding locations.



## Notes

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

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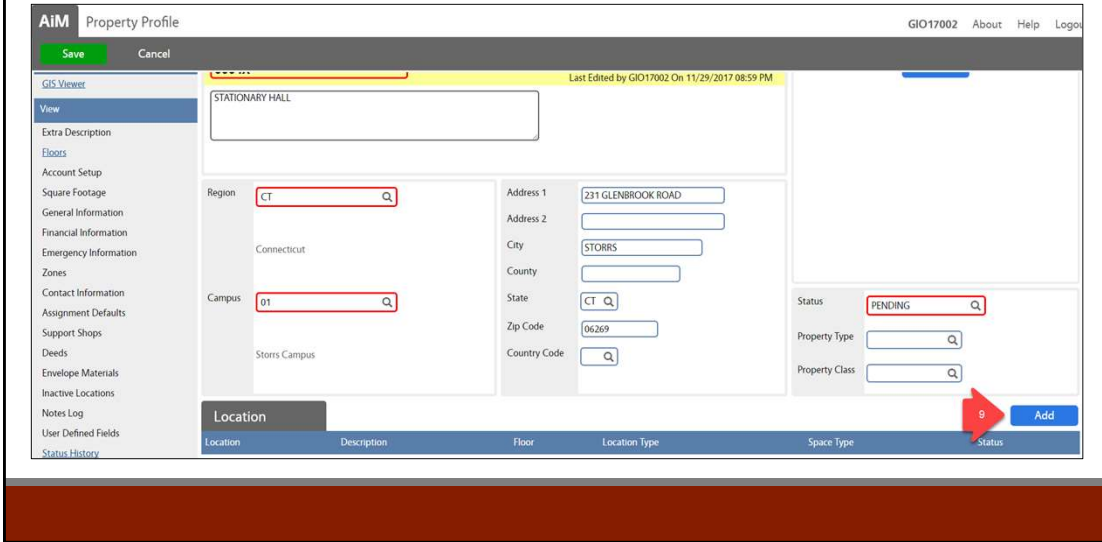


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# Enter a New Property

## Locations

9. Click the Add Button on the Location Detail Area.



## Notes

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Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

# Location Data Standards

## *Must Have Information*

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### **LOCATION ENTRY**

- Location Id's
- Location Type
- Primary Usage
- Space Type
- Location Status

Filling out the location profile with as much information is critical for reporting. The fields listed above follow specific data standards and hierarchical relationships.

Note: Primary Usage will be defined in Phase 2 of the project.

### Notes

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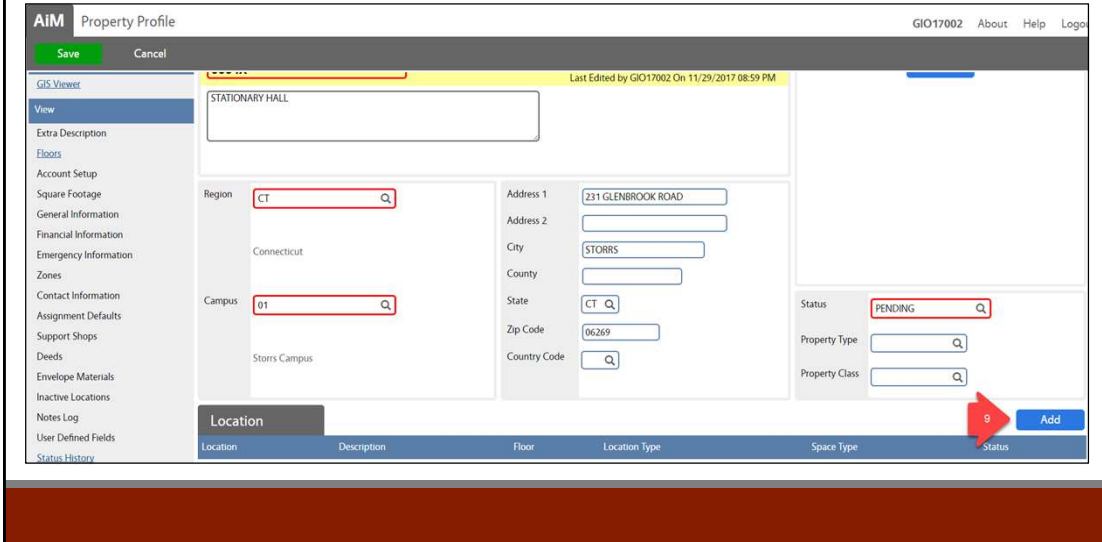
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# Enter a New Property

## Add Locations

9. Click the Add Button on the Location detail menu.



## Notes

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

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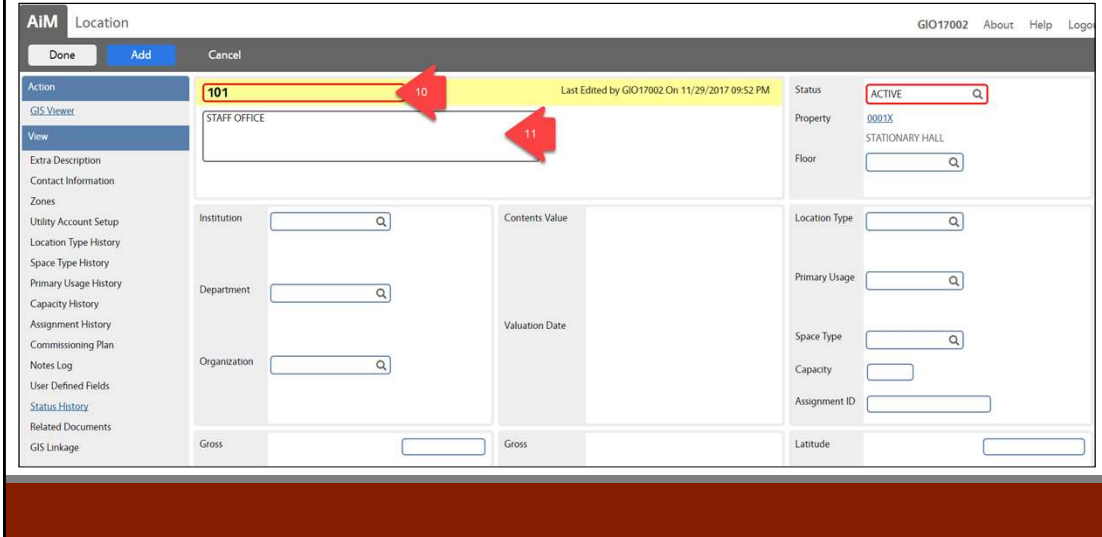
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# Enter a New Property

## Add Location Id and Description

10. Add the Location Identifier.

11. Add the Location Description. This should be the same as the Location Type Description.



Assignable Spaces will have the same description as the associated Location Type FICM code.

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

### Notes

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# Enter a New Property

## Add Location Owning Organization

10. Add the Organization. Click the Institution Zoom icon. Follow the prompts to select the correct Institution, Department, and Organization combination.

Tip: If known, add the Organization Identification Number, then click the Zoom icon (Magnify Glass) to auto populate the Dep

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

### Notes

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# Enter a New Property

## Add Location Type

11. Add the Location Type. Click the Location Type Zoon icon and follow the prompts.

The screenshot shows a software interface for entering a new property. At the top, there is a yellow header bar with the ID '101' and the text 'Last Edited by GIO17002 On 11/29/2017 09:52 PM'. Below this, there are several input fields and dropdown menus. The 'Location Type' field is highlighted with a red arrow and the number '11', indicating the step in the process. Other fields include 'Institution' (UCONN), 'Department' (1052), 'Organization' (1080), 'Status' (ACTIVE), 'Property' (0001X), 'Floor' (STATIONARY HALL), 'Primary Usage', 'Space Type', 'Capacity', 'Assignment ID', and 'Latitude'. There are also search icons next to several of the input fields.

Note: The Location Codes are the FICM codes.

Tip: (Main menu icon)

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

### Notes

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# Enter a New Property

## Add Location Primary Usage

12. Add the Primary Usage code. Click the Primary Usage Zoom Icon and follow the prompts.

The screenshot shows a software interface for entering a new property. At the top, there is a yellow header bar with the ID '101' and the text 'Last Edited by GIO17002 On 11/29/2017 09:52 PM'. Below this, there are several input fields and sections:

- Location Name:** A text box containing 'STAFF OFFICE'.
- Status:** A dropdown menu set to 'ACTIVE'.
- Property:** A dropdown menu set to '0001X STATIONARY HALL'.
- Floor:** An empty text box.
- Institution:** A dropdown menu set to 'UCONN' (University of Connecticut).
- Department:** A dropdown menu set to '1052' (Provost Academic Affairs).
- Organization:** A dropdown menu set to '1080' (Academic Affairs).
- Location Type:** A dropdown menu set to '310' (STAFF OFFICE).
- Primary Usage:** A dropdown menu set to 'GA' (General Administration). A red arrow with the number '12' points to this field.
- Space Type:** An empty text box.
- Capacity:** An empty text box.
- Assignment ID:** An empty text box.
- Gross:** Two empty text boxes.
- Latitude:** An empty text box.

Optional: Add Primary Usage.

In P In P	Uniformat Level II	Description
	A10	Foundations
	B20	Exterior Enclosures
	B30	Roofing
	C10	Interior Construction
	C20	Stairs
	C30	Interior Finishes
	D10	Conveying
	D20	Plumbing
	D30	HVAC
	D40	Fire Protection
	D50	Electrical
	E10	Equipment
	E20	Furnishings
	F20	Selective Building Demolitions
	G10	Site Preparation
	G20	Site Improvements
	G30	Site Mechanical Utilities

### Notes

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# Enter a New Property

## Add Location Space Type

13. Add the Location Space Type. Click the Space Type Zoom icon and follow the prompts.

ASSIGNABLE SHOULD BE SELECTED FOR ASSIGNABLE SPACES.  
NON-ASSIGNABLE SHOULD BE SELECTED FOR NON ASSIGNABLE SPACES.

The screenshot shows a software interface for entering a new property. At the top, there's a yellow header with the number '101' and the text 'Last Edited by GIO17002 On 11/29/2017 09:52 PM'. Below this, there's a search bar containing 'STAFF OFFICE'. To the right, there are several dropdown menus: 'Status' (ACTIVE), 'Property' (0001X), 'Floor' (STATIONARY HALL), 'Location Type' (310), 'Primary Usage' (GA), 'Space Type' (ASSIGNABLE), 'Capacity', and 'Assignment ID'. A red arrow with the number '13' points to the 'ASSIGNABLE' option in the 'Space Type' dropdown. On the left side, there are more dropdown menus for 'Institution' (UCONN), 'Department' (1052), and 'Organization' (1080). Below these are the text labels 'University of Connecticut', 'Provost Academic Affairs', and 'Academic Affairs'. In the center, there are labels for 'Contents Value' and 'Valuation Date'.

### Notes

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

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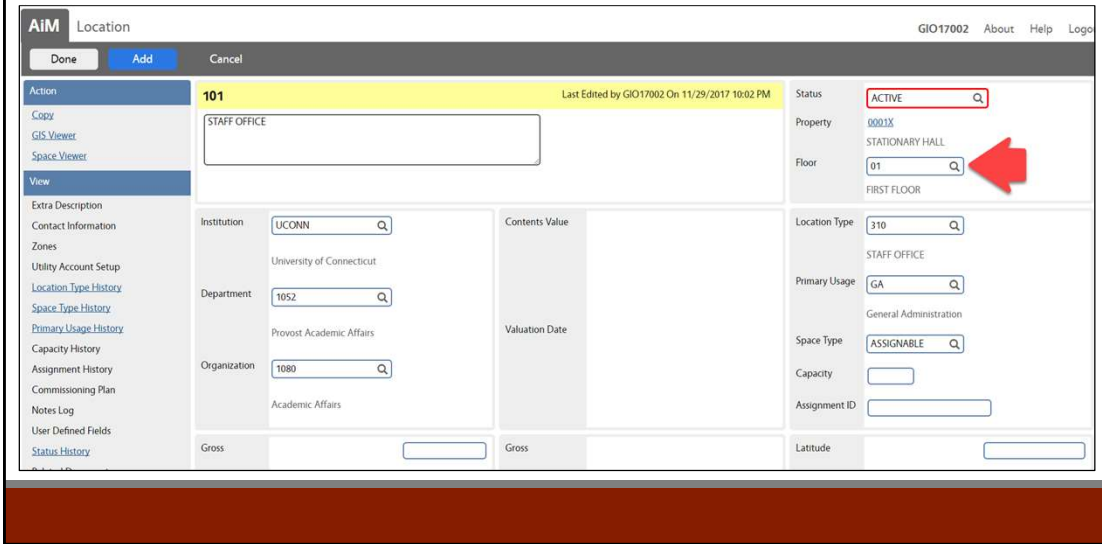


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# Enter a New Property

## Add Floor Identifier

Add the Floors. Click the Floor Zoom Icon and follow the prompts.



### Notes

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

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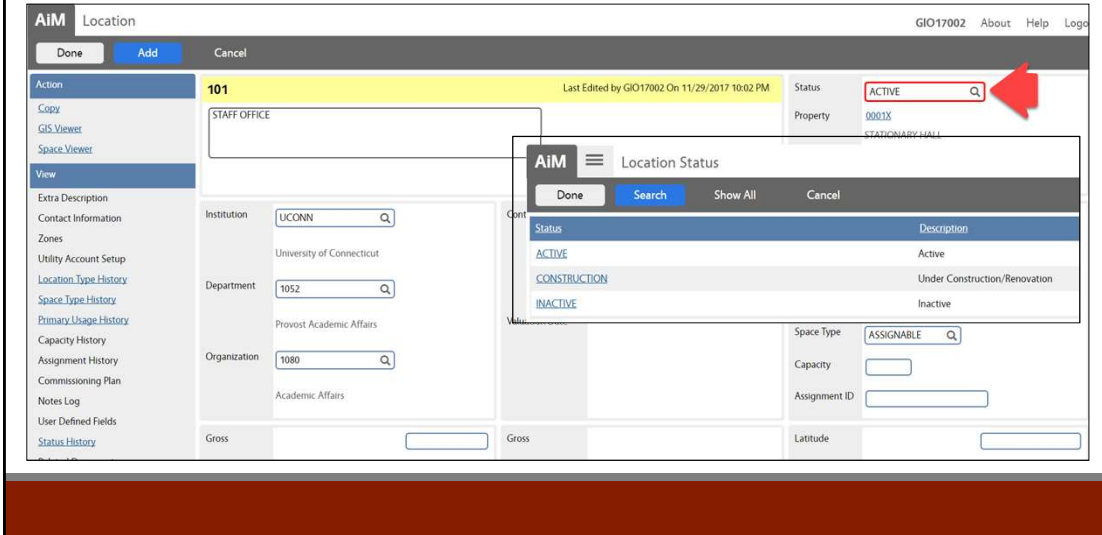


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# Enter a New Property

## Update Location Status

Update the Location Status. Click the Status Zoom Icon and follow the prompts.



### Notes

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Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

# Enter a New Property

## Add Locations

To add additional Locations, select the add button and repeat steps 10 – 13.  
When Finished adding locations, click the Done button.

The screenshot shows the AIM Location management interface. At the top, there are buttons for 'Done', 'Add', and 'Cancel'. The main form is titled 'Location' and contains several sections:

- Header:** '101' (highlighted in yellow), 'Last Edited by GIO17002 On 11/29/2017 09:52 PM', and 'Status: ACTIVE'.
- Property:** 'STAFF OFFICE', 'Property: 0001X', 'STATIONARY HALL', and 'Floor'.
- Institution:** 'UCONN', 'University of Connecticut'.
- Department:** '1052', 'Provost Academic Affairs'.
- Organization:** '1080', 'Academic Affairs'.
- Location Type:** '310', 'STAFF OFFICE'.
- Primary Usage:** 'GA', 'General Administration'.
- Space Type:** 'ASSIGNABLE'.
- Capacity:** (empty field).
- Assignment ID:** (empty field).
- Latitude:** (empty field).

## Notes

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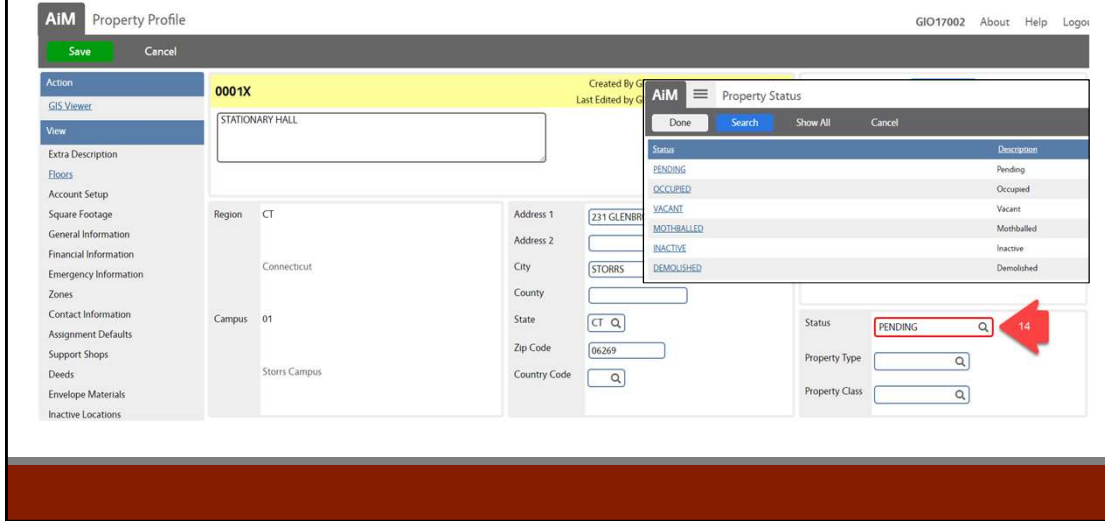
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Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

# Enter a New Property

## Update Property Status

14. Update the Property Status to Active when the property is ready to be used throughout the IWMS system. Click the Status zoom icon and follow the prompts.



### Notes

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

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# Enter a New Property

## Save Record

Click the Save Button to save the new property.

The screenshot shows the 'AIM Property Profile' form. At the top left, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box. The form contains several sections: a header with '0001X' and creation/edit timestamps; a 'View' section with a text input field containing 'STATIONARY HALL'; a 'Location' section with dropdowns for Region (CT), Campus (01), and State (Connecticut); an address section with input fields for Address 1 (231 GLENBROOK ROAD), Address 2, City (STORRS), County, State (CT), Zip Code (06269), and Country Code; and a 'Status' section with a dropdown menu set to 'OCCUPIED'. There are also search icons for Property Type and Property Class. A blue 'Add' button is at the bottom right.

## Notes

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

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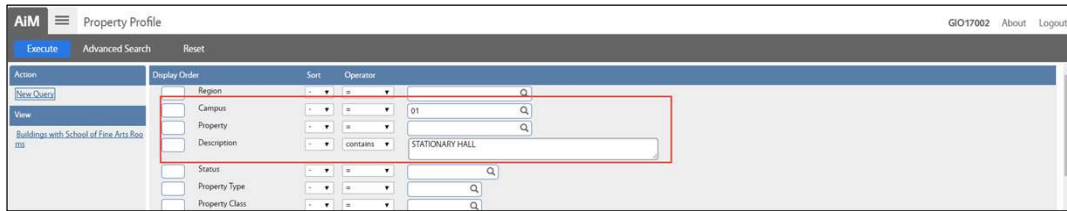
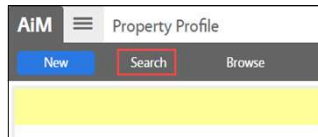


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# Update A Property/Location

## *Property and Phase Searching Function*

- Click **Search**
- The *Search* function allows you to narrow the results for Properties by field contents (such as Property Number or Description)



- To use the *Search* function, go through the options and enter a number under *Display Order* for any fields you would like to search by (displayed as columns left to right).
- Choose the options from the *Sort* and *Operator* drop down lists and enter the descriptor in the input field.
- Select *Execute*
- Based on the Search options selected, the work orders will appear as a list, sorted by the display columns selected

## Notes

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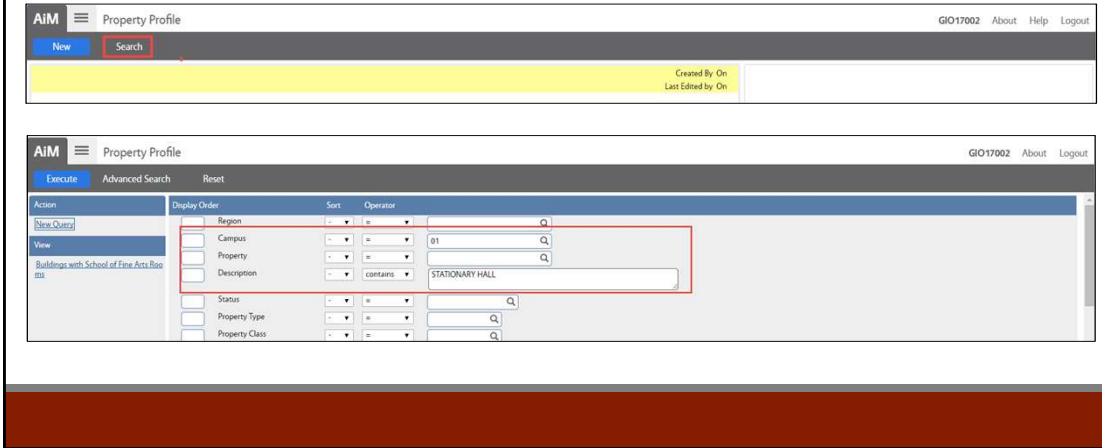
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# Try it Out!

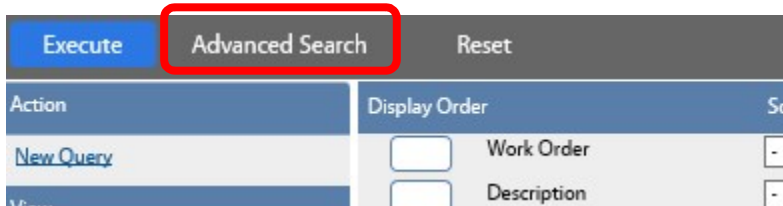
## Property/Location Search

- Under the *Property* tab, search for a Property with the following characteristics:
  - Located on Storrs Campus
  - Stationary Hall



An *Advanced Search* adds the ability to search by additional fields such as Property Zones, Property Contacts, etc.

## Notes




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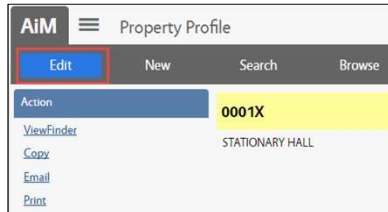


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# Update A Property/Location

## Editing Property

- Once the appropriate Property is found, to edit the entry, Select **Edit**
- Address can be edited.
- Status can be updated.



Address 1	231 GLENBROOK ROAD
Address 2	
City	STORRS
County	
State	CT
Zip Code	06269
Country Code	

Status	OCCUPIED
Property Type	
Property Class	

To note additional work required for work relating to a closed or canceled phase, enter an additional phase under the parent work order.

### Notes

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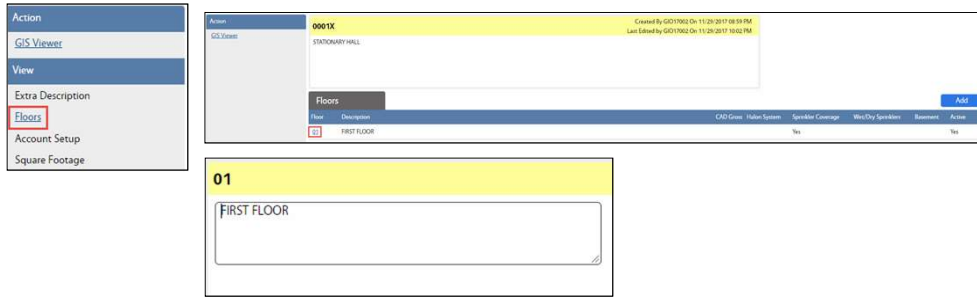


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# Update A Property/Location

## Editing Property/Floor

- Floor Description can be updated.



Click the Done button when Floor Update is completed.  
Click the Done button again when Finished Updating Floors.



To note additional work required for work relating to a closed or canceled phase, enter an additional phase under the parent work order.

## Notes

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# Update A Property/Location

## *Editing Location*

- From the Location tab select the Location to be edited.

Location	Description	Floor	Location Type	Space Type	Status
101	STAFF OFFICE	01	310	ASSIGNABLE	ACTIVE

To note additional work required for work relating to a closed or canceled phase, enter an additional phase under the parent work order.

### Notes

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# Update A Property/Location

## Editing Location

- The Organization can be changed.
- The Location Type, Primary Usage and Space Type can be updated by clicking the Zoom icon and following the prompts.

Institution: UCONN  
University of Connecticut

Department: 1052  
Provost Academic Affairs

**Organization: 1080**  
Academic Affairs

Status: ACTIVE

Property: 00015  
STATIONARY HALL

Floor: 01  
FIRST FLOOR

Location Type: 310  
STAFF OFFICE

Primary Usage: GA  
General Administration

Space Type: ASSIGNABLE

Capacity:

Assignment ID:

AiM Location

Done Add Cancel

Action 101

Click the Done Button when finished editing location.

Note: Once a Location has been inactivated, no updates can be done. To view inactive locations, go to the View Menu on the Property Profile and select the Inactive Locations option.

## Notes

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# Update A Property/Location

## *Editing Property/Floor/Location*

- Once Property, Floor, and Location edits are completed, Click the **Save** Button.

AiM Property Profile	
<b>Save</b>	Cancel
Action	0001X
<a href="#">GIS Viewer</a>	
View	STATIONARY HALL

To note additional work required for work relating to a closed or canceled phase, enter an additional phase under the parent work order.

### Notes

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# Part 3: Asset Management

UConn has also established asset standards based on Unifomat II. This training will only focus on covering the asset standards at a high level. The asset standards are only needed for Work Management tasks to identify affected pieces of equipment. For example, if a PM task is scheduled for completion on a specific air handling unit, the PM work order can be linked to that air handler.

## Notes

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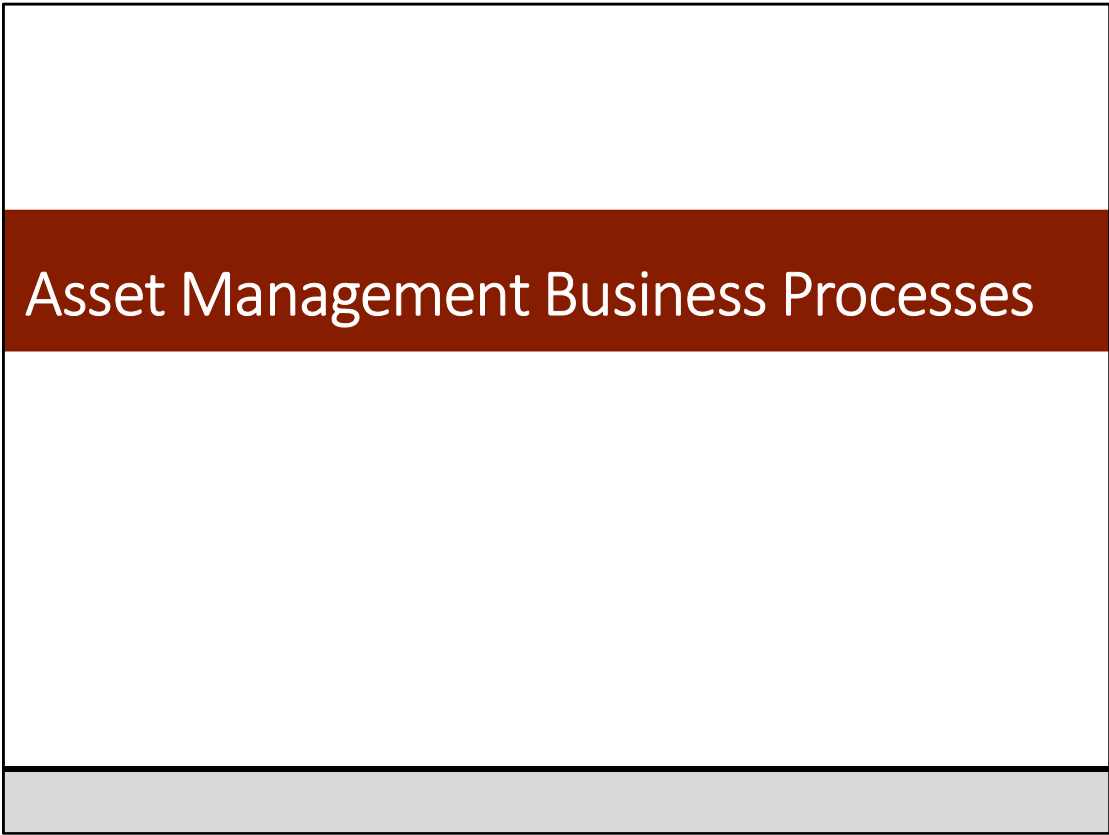
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The majority of the processes involved in this training are covered in the Property module.

The module covers processes located in the following tabs:

Work Management Module
Work Order
Phase
Daily Assignments
Purchase Request
Shop Stock Transactions

Notes

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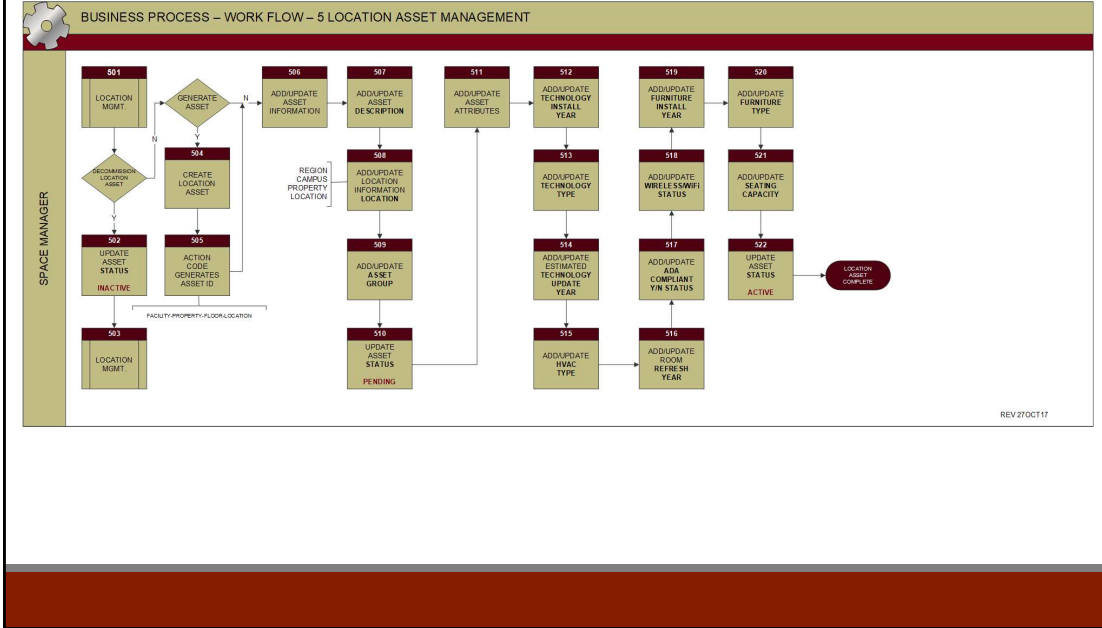
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Location Asset Management Process



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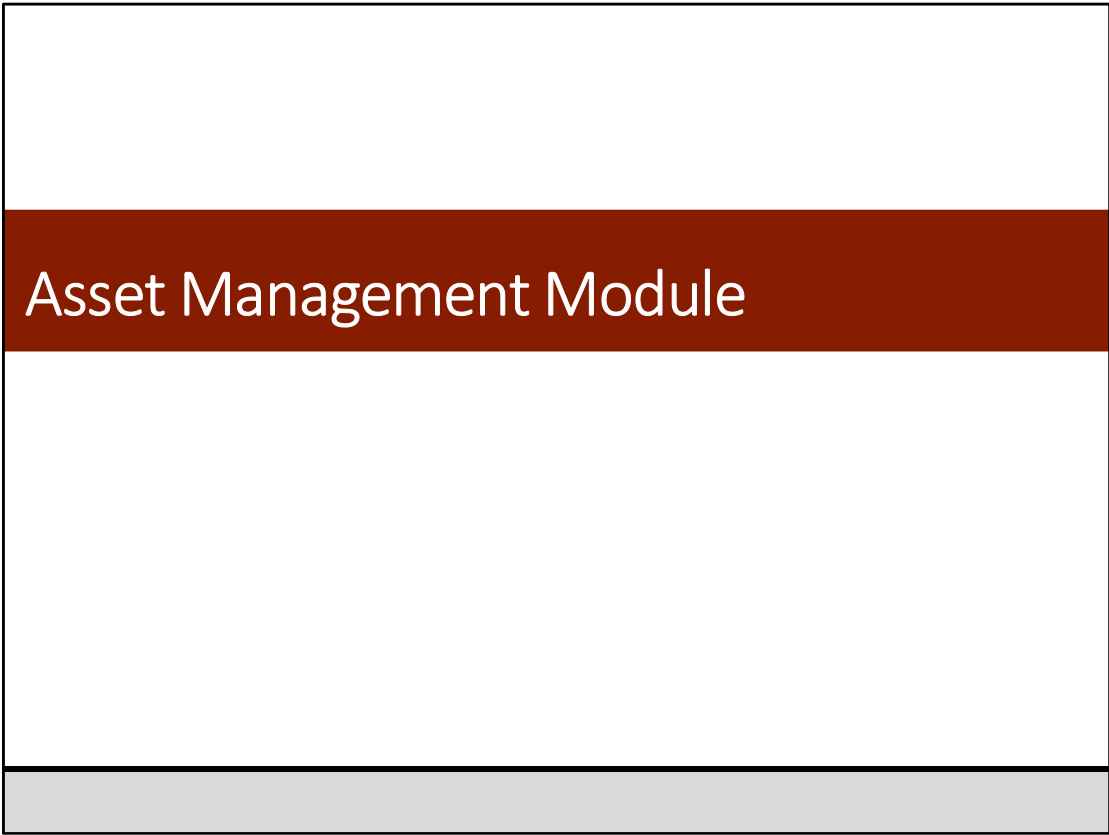
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The majority of the processes involved in this training are covered in the Property module.

The module covers processes located in the following tabs:

- Work Management Module**
- Work Order
- Phase
- Daily Assignments
- Purchase Request
- Shop Stock Transactions

Notes

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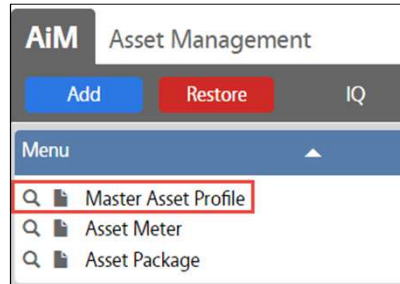
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# Asset Module

## Links to All Menus



- Select the Asset Management link from the Main WorkDesk Menu
- Links to the Asset Management Menu



When logged in, you'll be able to see the links to each Menu in the Property module. The WorkDesk™ is configurable and will be built out for specific roles.

### Notes

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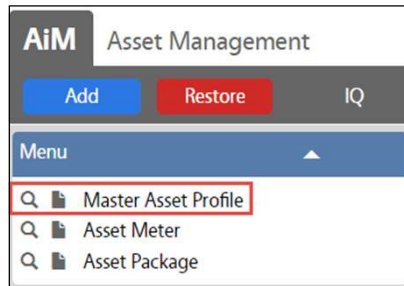
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# Asset Management Module

## Master Asset Profile



Property Menu:

- Enter a new Asset
- Update an existing Asset
- Search for existing Asset

Found in the Asset Module, the Master Asset Profile Screen is the primary screen for tracking Property and Location Asset in AiM.

### Notes

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# Asset Data Standards

## *Must Have Information*

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### LOCATION ASSET ENTRY

- Property Number, Campus, and Location Number
- Property Name
- Location Attribute Information

Filling out the work order with as much information is critical for assigning of work as well as reporting. The fields listed above follow specific data standards and hierarchical relationships.

### Notes

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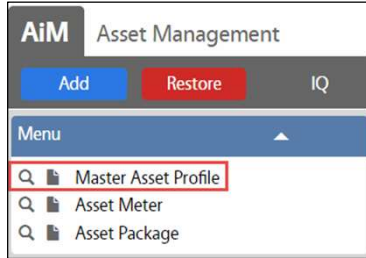
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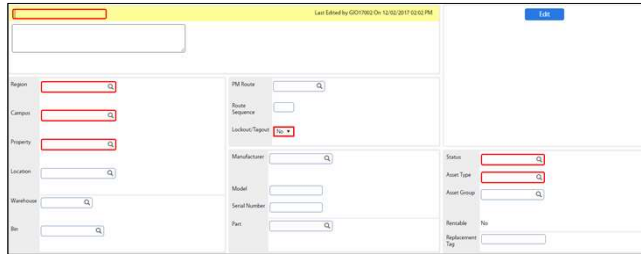
---

# Enter a New Asset

## Location Asset



- Navigate to the *Asset Management* Module
- Click the link to the *Master Asset Profile*
- Click *New*
- The new Asset record form will appear



Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

### Notes

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# Enter a New Asset

## Add Asset Number and Description

1. Add Asset Identification Number. This is the Campus-Property-Floor-Location Id
2. Add Asset Description. This is "CLASSROOM" Location Id "IN" Property Name (Property Number)

01-0001X-00-101
Last Edited by GIO17002 On 12/02/2017 02:02 PM

CLASSROOM 101 IN STATIONARY HALL (0001X)

Note: An Action Code will developed to automatically populate this information.

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

### Notes

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# Enter a New Asset

## Add Region, Campus, Property, Location

3. Add Region – Will Always Be CT for CONNECTICUT.
4. Add Campus – Select correct Campus from the list.
5. Add Property – Select correct Property from the list.
6. Add Location – Select correct Location from the List.

The screenshot shows a web form with the following fields:

- Region:** A dropdown menu with 'CT' selected. A red box highlights this field.
- Campus:** A dropdown menu with '01' selected. A red box highlights this field.
- Property:** A dropdown menu with '0001X' selected. A red box highlights this field.
- Location:** A dropdown menu with '101' selected.
- Warehouse:** An empty search field.
- Bin:** An empty search field.

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

### Notes

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# Enter a New Asset

## Add Asset Classification

- 7. Add Asset Type. Select System from the List.
- 8. Add Asset Group. Select FICM110 or FICM900 from the list.
- 9. Select the appropriate status, ACTIVE

The screenshot shows a web form for adding a new asset. The fields are as follows:

- Status: VALIDATION (with a search icon)
- Asset Type: SYSTEM (with a search icon)
- Asset Group: FICM110 (with a search icon)
- Classroom: (empty text field)
- Rentable: No (radio button)
- Replacement Tag: (empty text field)

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

### Notes

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# Enter a New Asset

## Save Record

10. Save the Asset before adding the Attributes.

The screenshot shows the 'AiM Master Asset Profile' form. At the top, there are 'Save' and 'Cancel' buttons. Below them is a table with columns for 'Action', 'View', and 'Extra Description'. The 'Action' cell contains the value '01-0001X-00-101'. The 'View' cell contains the text 'CLASSROOM 101 IN STATIONARY HALL (0001X)'. The 'Save' button and the 'Action' cell are highlighted with red boxes.

## Notes

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

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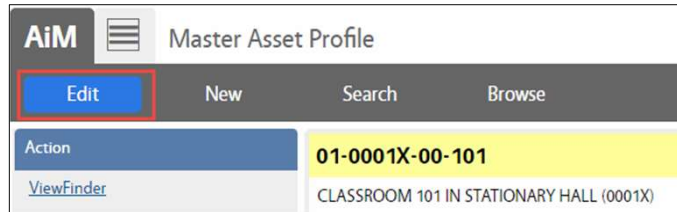


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# Enter a New Asset

## Add Attributes

11. Click the Edit button from the menu bar.



12. Click the Attributes link from the View menu.



Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

## Notes

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# Enter a New Asset

## Add Location Attributes

13. Add the appropriate Location Attributes.

Sequence	ID	Attribute	Value	Description
10	2	TECHNOLOGY INSTALL YEAR	<input type="text"/>	Technology Install Year
20	6	TECHNOLOGY TYPE	<input type="text"/>	Technology Type
30	4	ESTIMATED TECHNOLOGY UPGRADE	<input type="text"/>	Estimated Technology Upgrade Year
40	3	AIR CONDITIONING	<input type="text"/> Q	Air Conditioning
50	5	ROOM REFRESH YEAR	<input type="text"/>	Room Refresh Year
60	9	ADA COMPLIANT	<input type="text"/>	ADA Compliant
70	8	WIRELESS WI-FI STATUS	<input type="text"/>	Wireless Wi-Fi Status
80	7	FURNITURE INSTALL YEAR	<input type="text"/>	Furniture Install Year
90	10	FURNITURE TYPE	<input type="text"/>	Furniture Type
100	1	SEATING CAPACITY	<input type="text"/>	Seating Capacity

### Notes

Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

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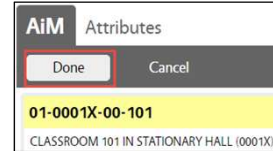


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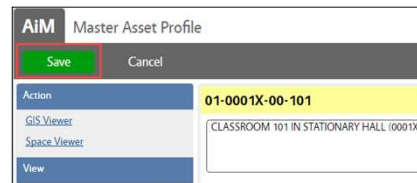
# Enter a New Asset

## Save Record

14. Click **Done**.



15. Click **Save**.



Uniformat Level II	Description
A10	Foundations
B20	Exterior Enclosures
B30	Roofing
C10	Interior Construction
C20	Stairs
C30	Interior Finishes
D10	Conveying
D20	Plumbing
D30	HVAC
D40	Fire Protection
D50	Electrical
E10	Equipment
E20	Furnishings
F20	Selective Building Demolitions
G10	Site Preparation
G20	Site Improvements
G30	Site Mechanical Utilities

## Notes

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# Update An Asset

## Property or Location Asset

- Select *Search* within the *Master Asset Profile*.
- The *Search* function allows you to narrow the search for Assets by field contents (such as Property Number, Description, Asset Group)

Display Order	Sort	Operator	
<input type="checkbox"/> Asset	- ▾	= ▾	<input type="text"/>
<input type="checkbox"/> Description	- ▾	contains ▾	<input type="text"/>
<input type="checkbox"/> Asset Type	- ▾	= ▾	<input type="text"/> <input type="button" value="Q"/>
<input type="checkbox"/> Asset Group	- ▾	= ▾	<input type="text"/> <input type="button" value="Q"/>
<input type="checkbox"/> Meter Type	- ▾	= ▾	<input type="text"/>
<input type="checkbox"/> Commercial Meter	- ▾	= ▾	<input type="text"/> <input type="button" value="Q"/>
<input type="checkbox"/> Status	- ▾	= ▾	<input type="text"/> <input type="button" value="Q"/>
<input type="checkbox"/> Region	- ▾	= ▾	<input type="text"/> <input type="button" value="Q"/>
<input type="checkbox"/> Campus	- ▾	= ▾	<input type="text"/> <input type="button" value="Q"/>
<input type="checkbox"/> Property	- ▾	= ▾	<input type="text"/> <input type="button" value="Q"/>
<input type="checkbox"/> Location	- ▾	= ▾	<input type="text"/> <input type="button" value="Q"/>

- To use the *Search* function, go through the options and enter a number under *Display Order* for any fields you would like to search by (displayed as columns left to right).
- Select *Execute*
- Based on the Search options selected, the Assets will appear as a list, sorted by the display columns selected

### Notes

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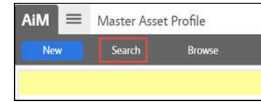
Property	Problem Code
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# Try it Out!

## Property/Location Search

- Under the *Master Asset Profile* menu, search for an Asset with the following characteristics:
  - Asset Group is FICM110
  - Property = 0001X



Display Order	Sort	Operator	
<input type="checkbox"/>	Asset	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Description	- ▾ contains ▾	<input type="text"/>
<input type="checkbox"/>	Asset Type	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Asset Group	- ▾ = ▾	FICM110 <input type="text"/>
<input type="checkbox"/>	Meter type	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Commercial Meter	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Status	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Region	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Campus	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Property	- ▾ = ▾	0001X <input type="text"/>
<input type="checkbox"/>	Location	- ▾ = ▾	<input type="text"/>

An *Advanced Search* (can configure to always see) adds the ability to complete a search by additional fields such as Phase Costs, Property Zones, Unit Costs, and Work Order Dependencies.

<input type="button" value="Execute"/>	<input type="button" value="Advanced Search"/>	<input type="button" value="Reset"/>						
<a href="#">New Query</a>	<table border="1"> <thead> <tr> <th>Display Order</th> <th>Sort</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Work Order</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Description</td> </tr> </tbody> </table>	Display Order	Sort	<input type="checkbox"/>	Work Order	<input type="checkbox"/>	Description	
Display Order	Sort							
<input type="checkbox"/>	Work Order							
<input type="checkbox"/>	Description							

Phase Costs		Operator	
<input type="checkbox"/>	Estimated Labor	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Estimated Material	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Estimated Equipment	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Estimated Contract	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Estimated Total	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Estimated Hours	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Encumbered Labor	- ▾ = ▾	<input type="text"/>
<input type="checkbox"/>	Encumbered Material	- ▾ = ▾	<input type="text"/>

## Notes

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# Update An Asset

## *Editing Asset Information*

- Once the appropriate Asset is found, to edit the entry, Select **Edit**

Action	Asset #	Description	Asset Type	Asset Group	Status	Region	Camera	Property	Location
<a href="#">GIS View</a> <a href="#">Export</a> <a href="#">View</a>	01-0001X-00-101	CLASSROOM 101 IN STATIONARY HALL (0001X)	SYSTEM	FICM110	VALIDATION	CT	01	0001X	101

**AiM** Master Asset Profile

**Edit** New Search Browse

**Action** **01-0001X-00-101**

[ViewFinder](#) CLASSROOM 101 IN STATIONARY HALL (0001X)

[Copy](#)

To note additional work required for work relating to a closed or canceled phase, enter an additional phase under the parent work order.

### Notes

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# Update An Asset

## Editing Asset Information

- Asset Type can be updated only at the Pending Status.
- Asset Group can be updated only at the Pending status.
- Asset Status can be updated anytime.

The screenshot shows a form with the following fields:

- Status: VALIDATION
- Asset Type: SYSTEM
- Asset Group: FICM110
- Classroom: (empty)
- Rentable: No
- Replacement Tag: (empty)

A red rectangular box highlights the Status, Asset Type, and Asset Group fields.

To note additional work required for work relating to a closed or canceled phase, enter an additional phase under the parent work order.

### Notes

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# Update An Asset

## *Editing Attribute Information*

- From the View menu, Select the Attributes link.



To note additional work required for work relating to a closed or canceled phase, enter an additional phase under the parent work order.

### Notes

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# Update An Asset

## Editing Attribute Information

- Add/Change any Attribute information.

Sequence ID	Attribute	Value	Description
10	2	TECHNOLOGY INSTALL YEAR <input type="text"/>	Technology Install Year
20	4	TECHNOLOGY TYPE <input type="text"/>	Technology Type
30	4	ESTIMATED TECHNOLOGY UPGRADE <input type="text"/>	Estimated Technology Upgrade Year
40	3	AIR CONDITIONING <input type="text"/> Q	Air Conditioning
50	5	ROOM REFRESH YEAR <input type="text"/>	Room Refresh Year
60	9	ADA COMPLIANT <input type="text"/>	ADA Compliant
70	8	WIRELESS WI-FI STATUS <input type="text"/>	Wireless Wi-Fi Status
80	7	FURNITURE INSTALL YEAR <input type="text"/>	Furniture Install Year
90	10	FURNITURE TYPE <input type="text"/>	Furniture Type
100	1	SEATING CAPACITY <input type="text"/>	Seating Capacity

- When completed, click the Done Button.

**AiM** Attributes

Done Cancel

**01-0001X-00-101**

CLASSROOM 101 IN STATIONARY HALL (0001X)

To note additional work required for work relating to a closed or canceled phase, enter an additional phase under the parent work order.

### Notes

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# Update An Asset

## Editing Asset Information

- Once updating the Asset is completed, Click the Save Button.

The screenshot shows the 'AiM Master Asset Profile' window. At the top, there is a 'Save' button highlighted with a red border and a 'Cancel' button. Below the buttons, there is a table with two columns. The first column contains links for 'Action', 'GIS Viewer', 'Space Viewer', and 'View'. The second column contains the asset ID '01-0001X-00-101' and a text area with the description 'CLASSROOM 101 IN STATIONARY HALL (0001X)'.

Action	01-0001X-00-101
<a href="#">GIS Viewer</a>	CLASSROOM 101 IN STATIONARY HALL (0001X)
<a href="#">Space Viewer</a>	
<a href="#">View</a>	

To note additional work required for work relating to a closed or canceled phase, enter an additional phase under the parent work order.

### Notes

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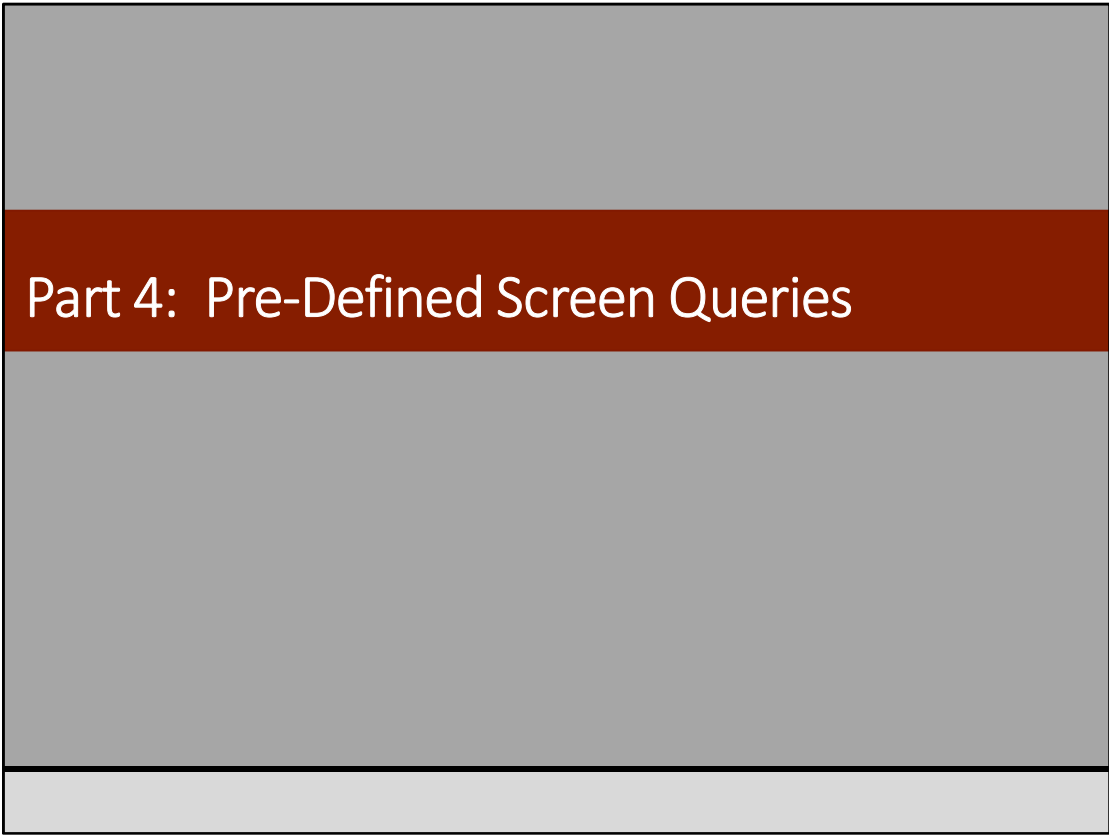
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Supervisors and Technicians have the ability to pull reports from pre-defined screen queries located in the main WorkDesk under **Report Listing**. The reports will be available based on the role of the staff, and can be configured to pull specific reports.

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# Pre-Defined Screen Queries

## Report Listing

Asset	
Description:	CLASSROOM 101 IN STATIONARY HALL (0001X)
Asset Type:	SYSTEM (SYSTEM)
Asset Group:	FICM110 (Classroom)
Manufacturer:	Model:
Part:	Serial No:
Sale Price:	\$0.00
UOM:	
Replacement Tag:	Quantity: 1.0000
Rentable:	No
Assembly:	No
Moveable:	Priority:

The reports from the Report Listing tab can be exported to excel or printed. Run the report by clicking on the link and choosing the parameters. The icons in the upper left side of the analysis screen allows users to print or export reports.

Additional Report Listing options are included under each separated module in AiM

Examples of the most used reports include the following depending on the employee’s role:

1. *Asset Profile*

Notes

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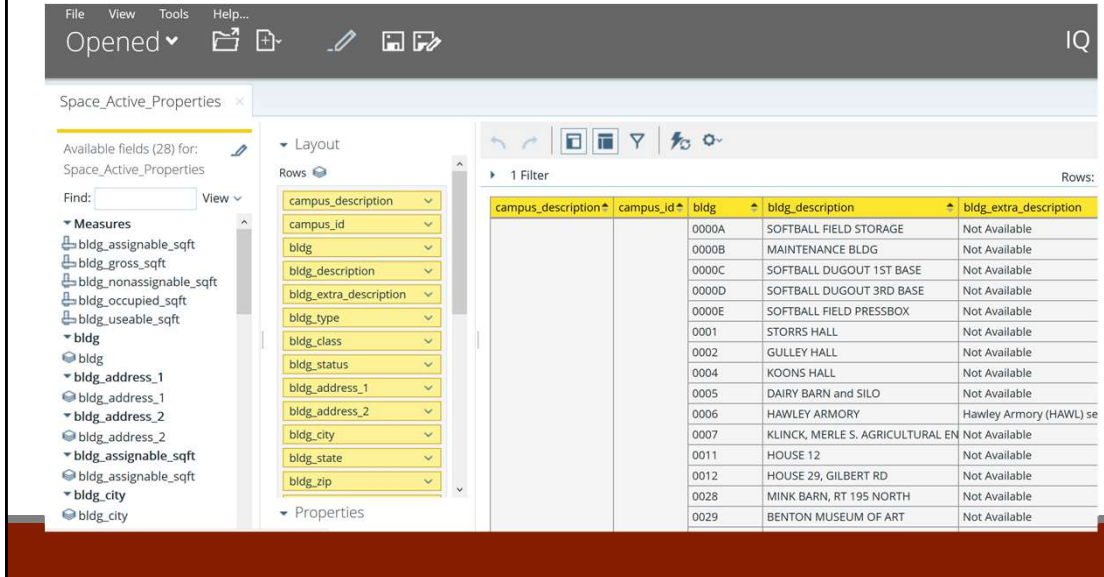
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# Pre-Defined Screen Queries

## Top Ten Potential Reports

- IQ Reports are predefined. End User chooses the column, sort order, and filters.



AiM IQ is a reporting tool for non-report writers. The User selects from predefined reports columns. Drags them on the report, then applies filters and sorting.

### Notes

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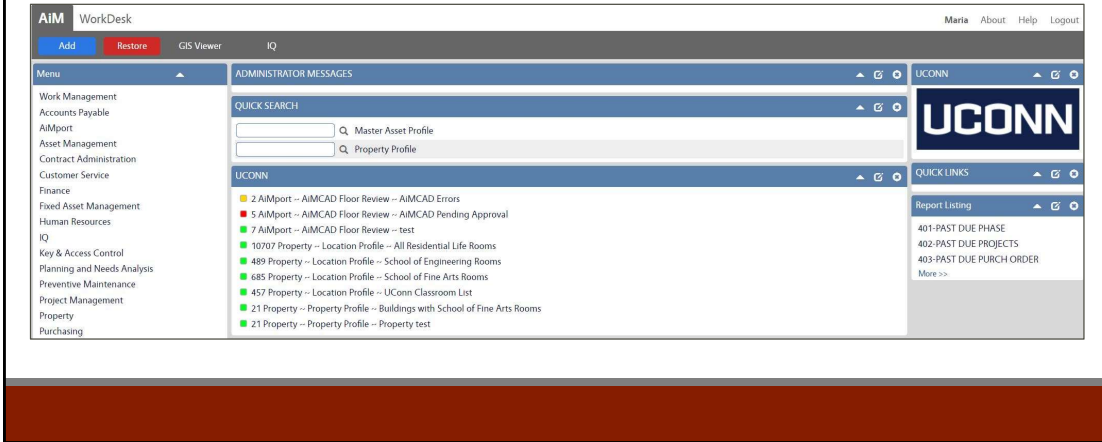


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# Pre-Defined Screen Queries

## WorkDesk

The AiM WorkDesk is the user's landing page that offers a graphical gateway to important business information that users access every day. The WorkDesk aggregates user-specified data such as notices, approvals, tasks, queries, and more.



## Notes

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