
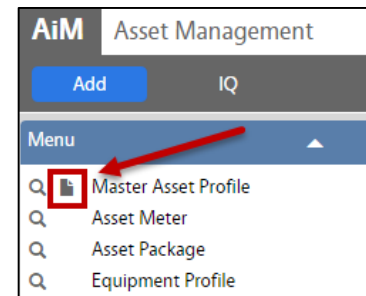



Add Asset Records into AiM

1. From the WorkDesk, select **Asset Management** in the Module list.
2. Click:  **NEW** (Next to **Master Asset Profile**)
3. **Asset ID:** AiM will default a system generated number. If you prefer, replace the number.



4. Enter a **Description**, which should identify the asset.
5. Enter **Region**, Click  search. Select a campus by clicking on the name.
6. Enter **Facility**, Select by clicking on the name.
7. Enter **Property**, to select click on the name.
8. **–Optional–** Enter **Location**. (Room number)

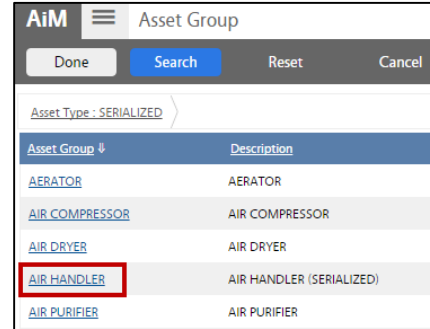
Once selected, you will return to the Master Asset Profile screen and all data will auto-populate into the fields.

9. *Leave the following Blank: Warehouse and Bin.* Only complete if the component is not in use and physically resides in the inventory warehouse.
10. **Lockout-Tagout (LOTO)** is a safety procedure which is used to ensure dangerous machines are properly shut off and not started up again prior to the completion of maintenance or service work. The LOTO field in AiM has **limited functionality, it is only an end-user notification.** Choose **'Yes'** if the asset requires a lock out / tag out procedure when performing maintenance.

11. Select a **Manufacturer**. Click:  (If the Manufacturer is not on the list, it can be setup. Select **Inventory** from the **Module List**, and then Select **Manufacturer** from the **Setup list**.)

12. Enter the **Model** and **Serial Number**. **Part** is optional, and only valid if it is an actual part in inventory.

13. Select the **Asset Type: Serialized**.



14. Select an **Asset Group**.

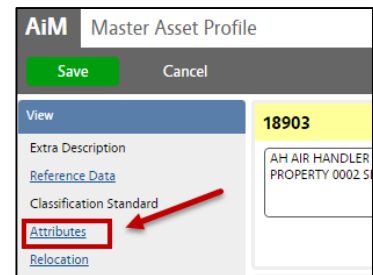
15. Select a **Status**.

Choose one from the following options:

- a. **ACTIVE** - identifies the asset as one that could be used on work orders or for other transactions, depending upon its asset type. Moving an asset to an active status locks several fields from entry: asset type, asset group, asset class, location and purchase date, useful life, purchase cost, salvage value, department, and fund
- b. **INACTIVE** - retires an asset and removes it from use within the system. All histories will be maintained for reporting purposes.

16. From **View** menu, click: **Attributes**

- a. Enter **Attribute values**. Attributes vary based on asset group; and were designed by OSU Facilities Management Services shop Leads and Managers. Some of the attribute values are required and others are optional.



17. **Shop Support Services Only**. From **View** menu, click: **Account Setup**
Account information is required for vehicles and equipment maintained by Landscape Shop Support Services.

- a. Add a Charge account, Click: **ADD**
 - i. FOR GU BUILDINGS ENTER THIS INFORMATION:
 - 1. Account: Enter the Department that funds the work order
 - 2. Sub Code: Make selection
 - 3. Percentage: 100
 - 4. Subledger: All
 - ii. For auxiliary buildings, enter the charge account for the department that is funding this service.
- b. Click: **DONE**

18. From **View menu**, click: **Warranty**. The warranty screen identifies reference details regarding equipment warranty. This warranty will be flagged on the work order phase as an alert if active.

a. Click: **ADD** to enter **Warranty** information.

Contractor: 1061
 Air Compressor Supply Company
 Address Code: OKC
 Contract Type: [Dropdown]
 Contract: [Search]

b. Enter **Contractor**. Identifies the contractor and the contractor address code for the contractor responsible for providing warranty services or repairs the asset.

c. *Optional:* enter **Start & Expire** Dates. Specifies the active period of the warranty for the asset for which the identified contractor is responsible to provide services or repairs specified in the terms.

Start Date: [Calendar]
 Expire Date: [Calendar]
 Review Date: [Calendar]

d. Click: **DONE** (*twice*) which returns you to the Master Asset Profile screen.

19. From **View menu**, click: **Locations Served**. Support locations are places served by an asset. For instance, if a particular large air handler provides air handling to several floors in a building, the rooms on those floors are the air handler's supported locations.

a. Click: **Load** to enter places served by the asset.

Sequence	Region	Facility	Property	Location	Floor	Description	Usage Percent
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Buttons: Remove, Load

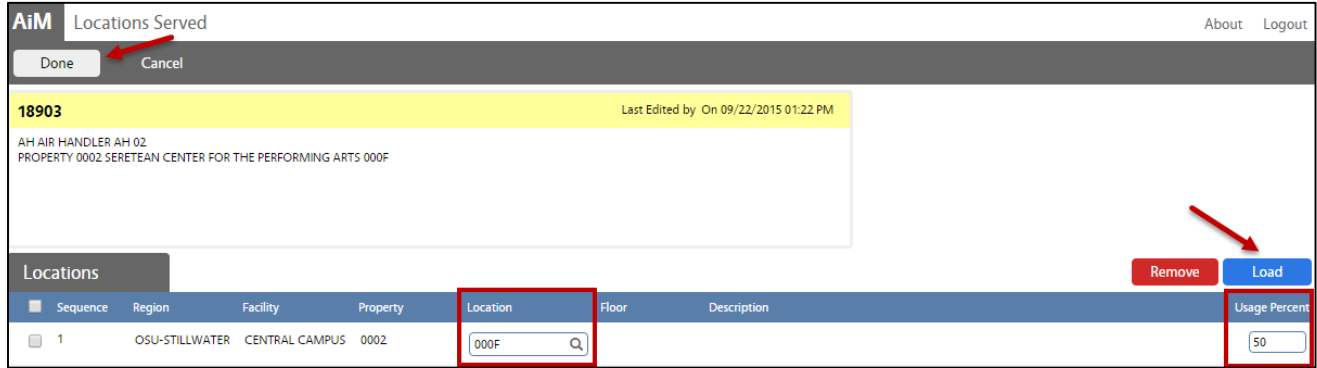
b. Search for the **Region, Facility** and **Property**, then click **EXECUTE**.

AiM Load Locations
 Execute Reset
 Operator
 Region: [Dropdown] [Search]
 Facility: [Dropdown] [Search]
 Property: [Dropdown] [Search]
 Description: contains [Text]
 Property Type: [Dropdown] [Search]
 Status: [Dropdown] [Search]
 Editor: [Dropdown] [Search]
 Edit Date: [Dropdown] [Calendar]

c. **Make selections & click: DONE.**

a. Search for **Location** & select.

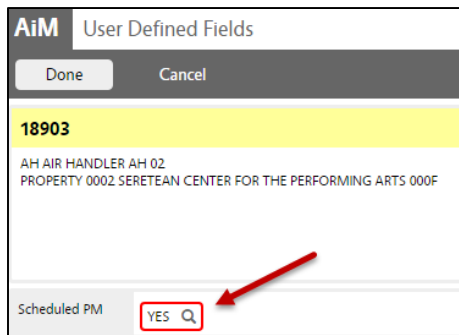
b. Enter **Usage Percentage**. The usage factor block identifies the percent of time or capacity of an asset that a location utilizes. For example, if an air handler supports four locations that are the same size, then the usage factor entered for each room would be 25 percent.



c. Repeat Steps “a-e” for all locations served by this asset.

d. Click: **DONE**

20. Under **View (Left Side Bar)**, select **User Defined Fields**.



Note: The Scheduled PM field automatically populates to YES, which identifies that the asset contains PM activities. If not, select NO.

User defined fields (UDFs) provide the ability to create fields for data entry not provided in the baseline system. UDFs must be built in the system administration module for the module screen where the UDF will be employed. The UDF can be linked to a validation table so the user selects values from a predefined list. The UDF may even be marked as required to complete a record.

a. Click: **DONE**, which returns you to the Master Asset Profile screen.

21. On the Master Asset Profile screen, click: **SAVE**.