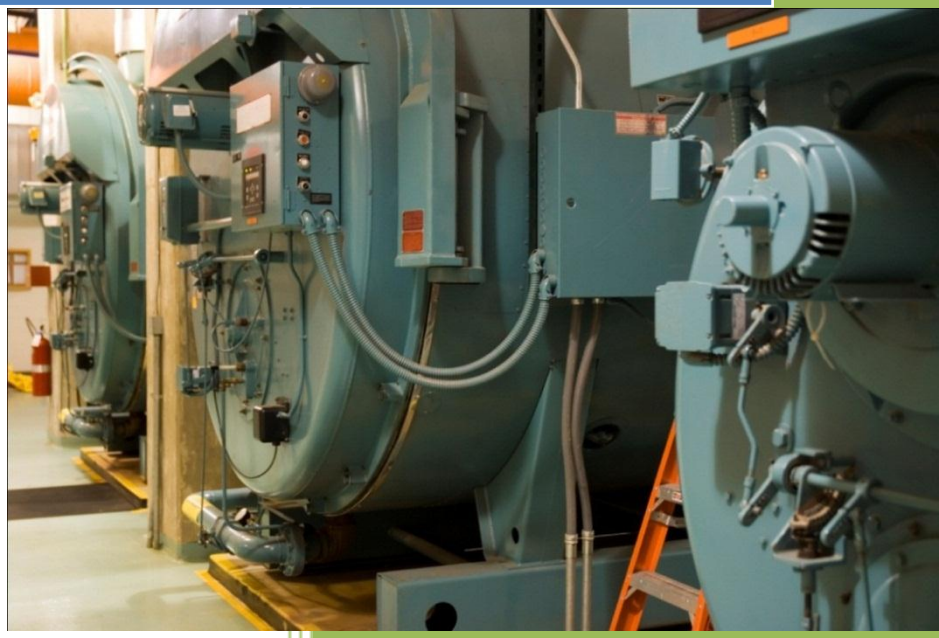
5.0 User Guide

WEB Asset Manager



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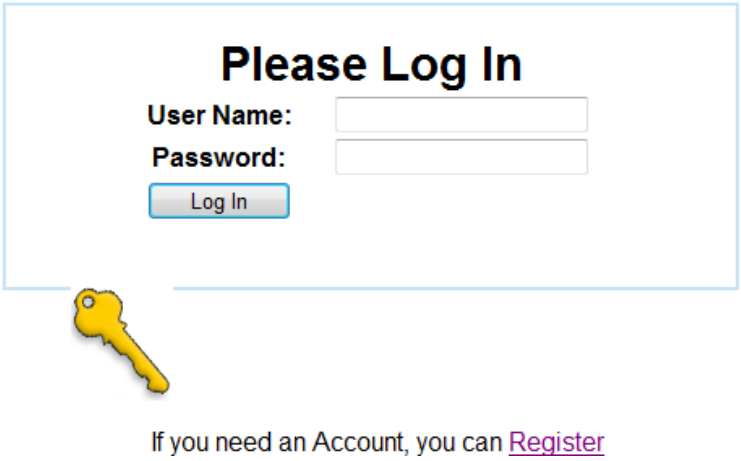
WEB Asset Manager

The WEB Asset Manager is primarily used to keep track of any type of district asset such as:

- HVAC
- AHUs
- Chillers
- Boilers
- Vehicles
- Computer Equipment
- Kitchen Equipment

Login to TeamWORKS WEB



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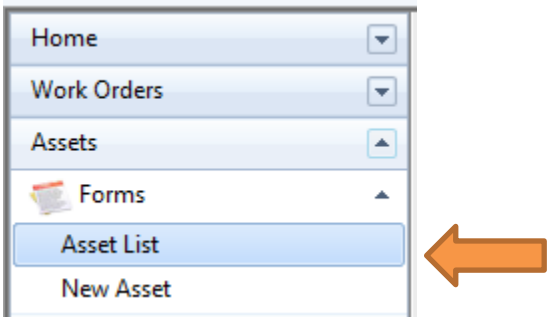
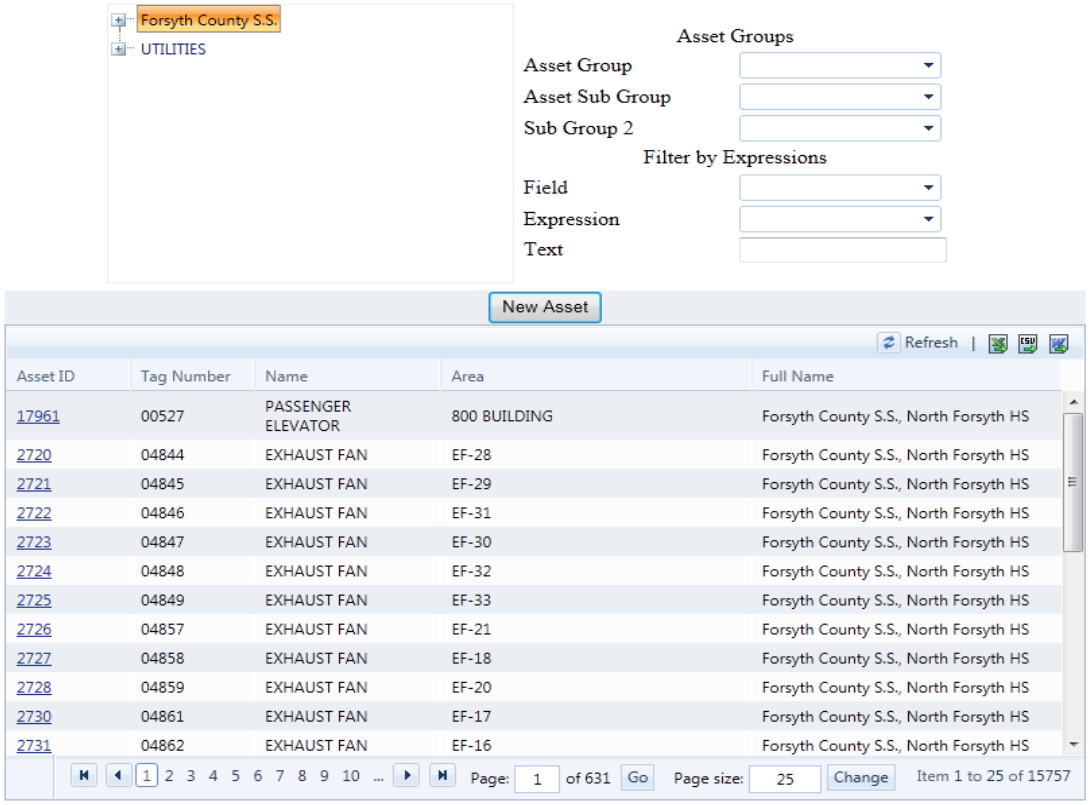
Asset List

The Asset List enables users to view all existing assets.

From the main menu Click on Assets and Select Asset List.



This will yield the Asset List Screen shown below.



New Asset - From this screen and depending upon your TeamWORKS permissions you can view, update or create new assets information.

Asset ID – System generated field identified a unique number for this asset. Click to view asset details.

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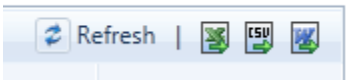
Tag Number – ***unique*** number assigned to this specific piece of equipment. (E.g. Vehicle could be license plate number, AHU could be 003AHU1, or any other district number).

NOTE: If Asset Tag # needs to be changed double click inside the field. ***It is good practice NOT to reuse Asset Tag Numbers when units are replaced.***

Name – the name of the assets

Area – Displays the area in which the asset is located or the area serviced by the asset.

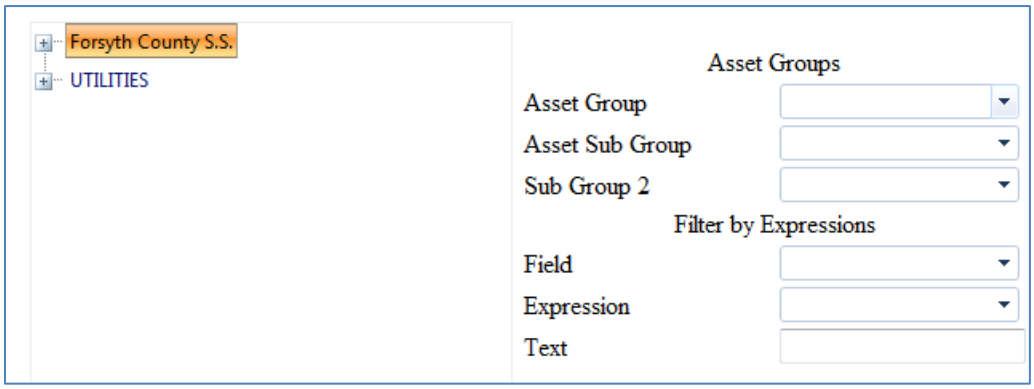
Full Name – the full name of the location of the assets



Export to Microsoft Excel, CSV (comma Separated Values) it will open it Excel and to open in Microsoft Word. From these formats you can Save, Email and Print if needed.

From the Asset List Screen, users can search for a specific asset by Location, Asset Groups, or Filter by Expressions.

Note: the goal is to narrow down your results to view specifically what you are looking for.



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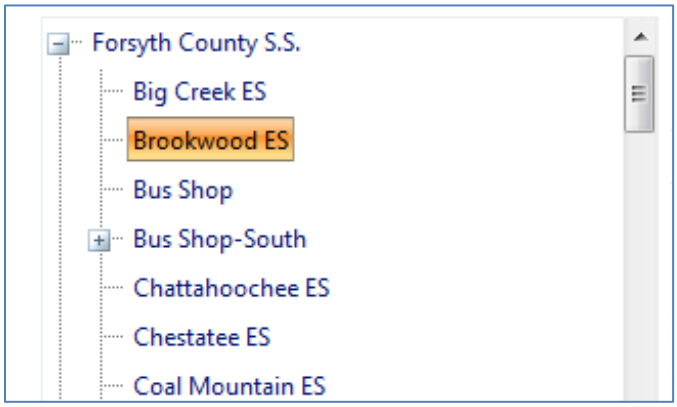
Location

Allows users to search assets by parent or sub locations.



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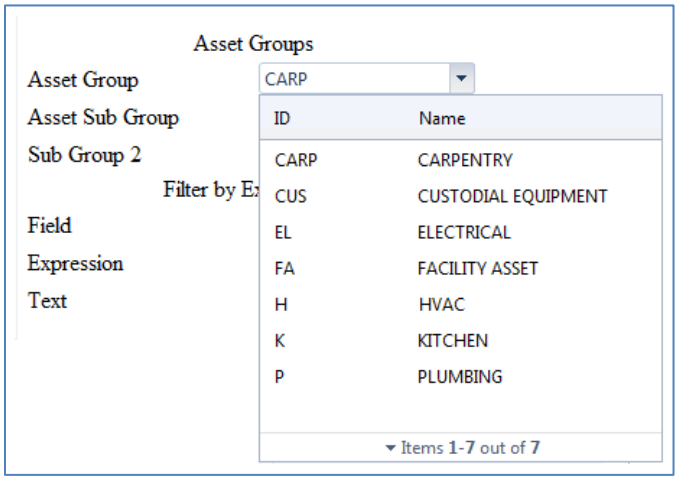
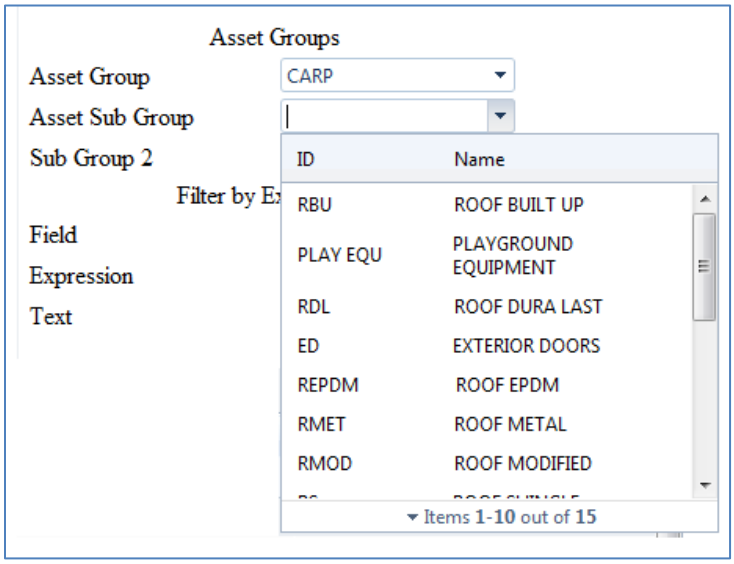
Asset Groups

By selecting the Asset Group you are able to narrow down your choices by ID and Name



<u>Asset Sub Groups</u> - Users can further narrow down the list by selecting the Asset Sub Group and Sub Group 2 (if available)



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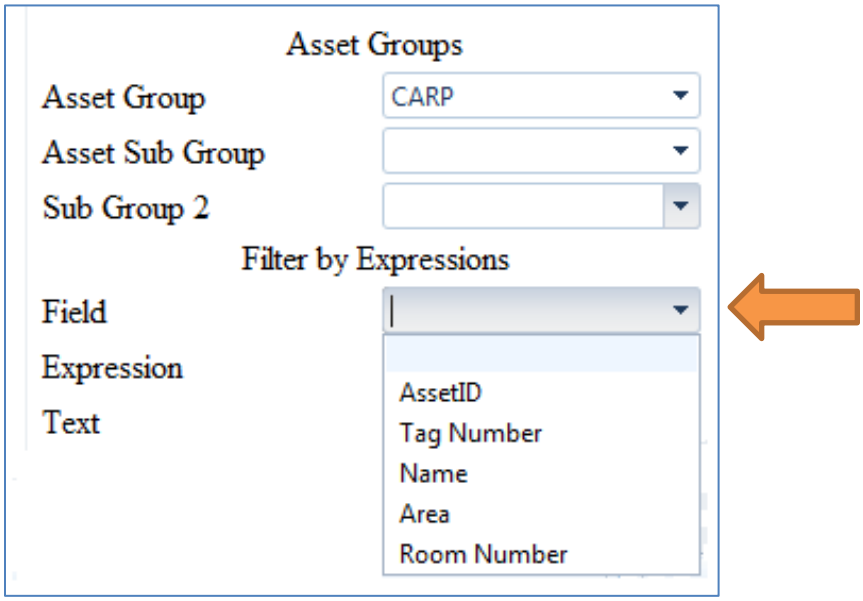
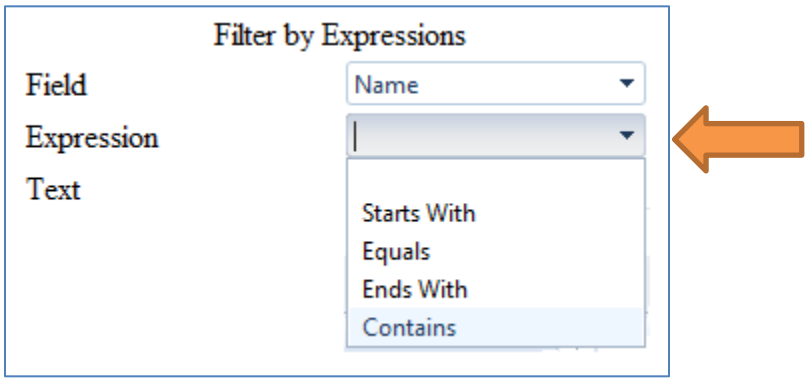
Filter By Expressions

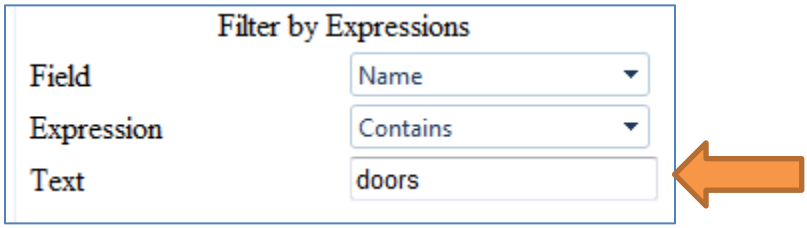
Field - Allows users to search assets by AssetID, Tag Number, Name, Area or Room Number



Expression – search by Starts With, Equals, Ends With, or Contains



Text – Free form allows users to type specific asset information they looking for. (For example: doors) as used below.



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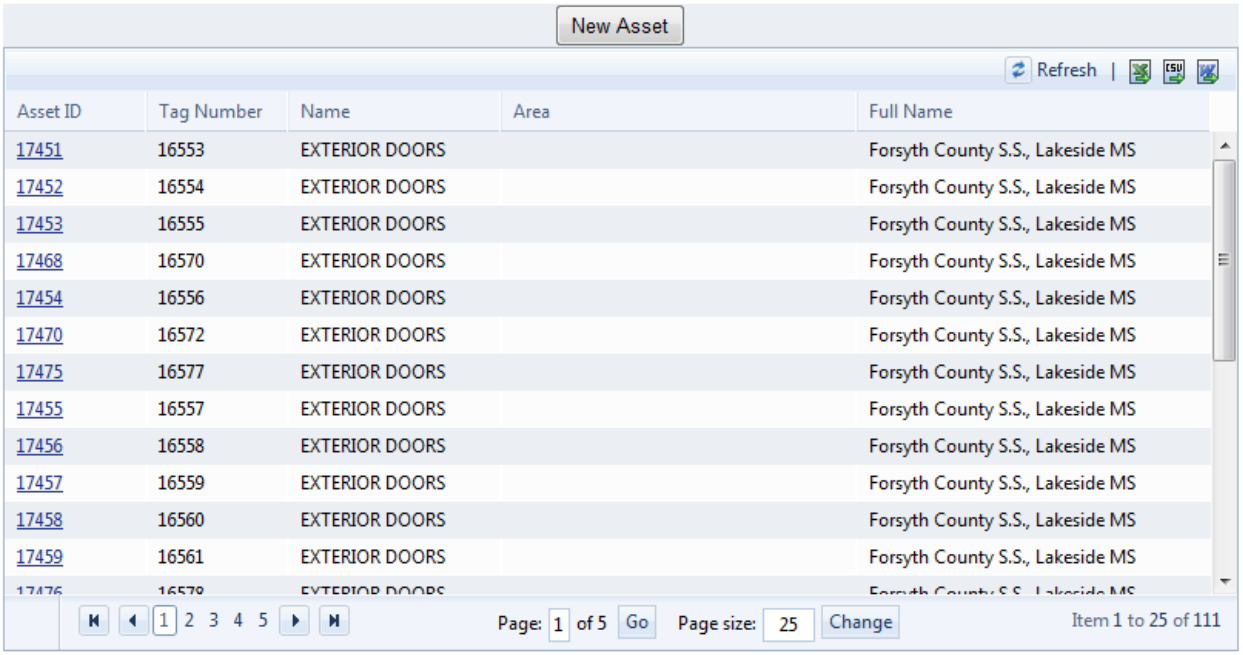
Search results will show all the assets that have doors contained in their name as shown below.



New Asset

Refresh

Asset ID	Tag Number	Name	Area	Full Name
17451	16553	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS
17452	16554	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS
17453	16555	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS
17468	16570	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS
17454	16556	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS
17470	16572	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS
17475	16577	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS
17455	16557	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS
17456	16558	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS
17457	16559	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS
17458	16560	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS
17459	16561	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS
17476	16578	EXTERIOR DOORS		Forsyth County S.S., Lakeside MS

1 2 3 4 5 Page: 1 of 5 Go Page size: 25 Change Item 1 to 25 of 111

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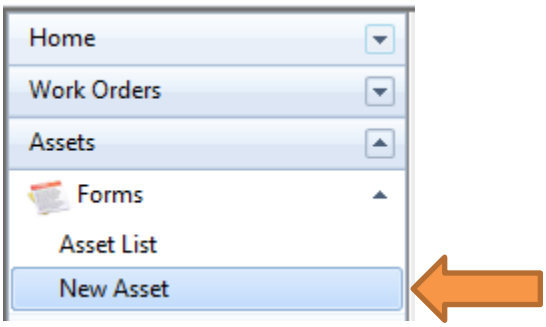
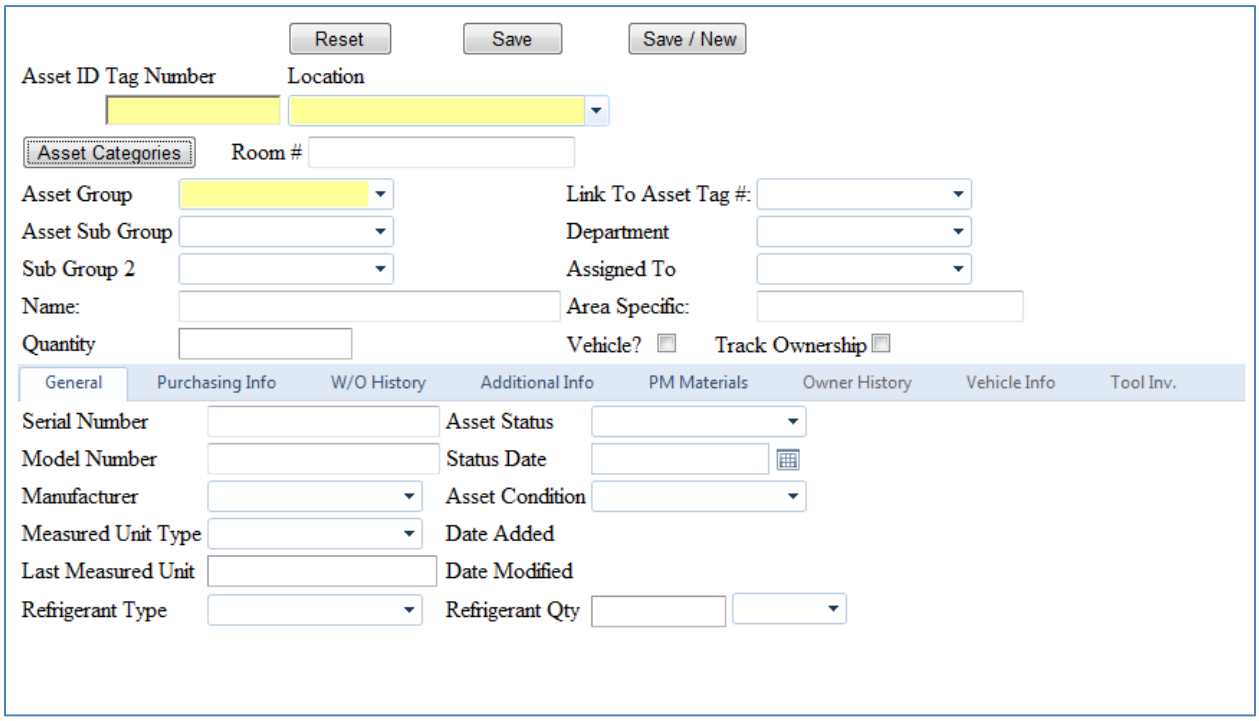
Creating a New Asset

To create a New Asset, Click the New Asset from the Assets menu



The next screen provides you with a blank record in order to create a new asset record.

NOTE: Yellow highlight fields are system required fields and data must be entered in order to save the record.



Asset ID – System generated field identified a unique number for this asset.

Tag Number – ***unique*** number assigned to this specific piece of equipment. (E.g. Vehicle could be license plate number, AHU could be 003AHU1, or any other district number). *NOTE: If Asset Tag # needs to be changed double click inside the field.* ***It is good practice NOT to reuse Asset Tag Numbers when units are replaced.***

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Location – Location of this asset; sorted by Location ID

Asset Categories – opens the Asset Categories Form to enable users to view, add, edit and delete asset categories.

Room # - if your path structure is not down to the room level, you can put the room number or room location of this asset

Asset Group – enter or select the Asset Group for this asset. This will filter out your Asset SubGroup list. *NOTE: If a user changes an Asset Group they will need to change them in PM Schedules separately.*

Asset SubGroup – enter or select the Asset SubGroup. This will filter out your Asset SubGroup2 list

SubGroup2 – enter or select the Asset SubGroup2.

** Note – as you select your Asset Group, SubGroup and SubGroup2, the system will automatically populate these selected items in the Name field. You can add to or edit your Name field.*

Name – the name of this asset. See note above.

Quantity – enter the quantity for this asset. This is used for tracking fixed assets.

Link To Asset Tag # - this field allows you to tie this piece of equipment to another. (e.g. you list a compressor and an AC unit separately, but link them to each other with this field)

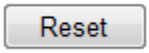
Department – assign this asset to a department

Assigned To – assign this asset to an employee

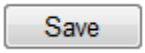
Area Specific – note a more specific area where this asset is located (e.g. in the rafters, NE Roof) or the area serviced by this asset.

Vehicle? – is this asset a Vehicle? If you check the check box, a Vehicle Info Tab will appear, allowing you to capture more specific data for the vehicle.

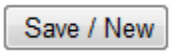
Track Ownership? – if you have assets that move locations, are reassigned to a new department or employee, or change asset status from time to time, click this check box and it will track the history for these changes.



- Resets the Assets Record form.



- Saves changes to the Assets Record form.



- Saves changes to the Assets Record form and brings up a new form.

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General Info Tab

General | Purchasing Info | W/O History | Additional Info | PM Materials | Owner History | Vehicle Info | Tool Inv.

Serial Number	94D05430	Asset Status	Active
Model Number	GB-100-4	Status Date	
Manufacturer	GRE	Asset Condition	USED
Measured Unit Type		Date Added	3/28/2007 9:36:56 AM
Last Measured Unit		Date Modified	1/31/2007 3:54:55 PM
Refrigerant Type		Refrigerant Qty	

Serial Number – enter a serial number for this asset.

Model Number – enter the model number for this asset.

Manufacturer – enter or select the Manufacturer for this asset. To add a new manufacturer, simply click the Manufacturer link above the field.

Measured Unit Type – enter or select the measured unit for this type of equipment.

Refrigerant Type – if this asset requires refrigerant, enter or select from this list.

Asset Status – enter or select the status of this asset.

Status Date – as you make a status change, the system populates the date the status changed.

Asset Condition – your asset condition may change from year to year, so update your condition in this field.

Date Added – system generated showing the date the asset was entered into the system.

Refrigerant Qty – enter the maximum capacity of the refrigerant type for this asset.

Purchasing Info Tab

General | Purchasing Info | W/O History | Additional Info | PM Materials | Owner History | Vehicle Info | Tool Inv.

PO Number		Life Expectancy	15	Years
Invoice Number		Acquisition Date		
Unit Cost		Warranty Expiration Date	8/1/1995	
Primary Account ID		Date Placed In Service	8/1/1994	
Amount Primary	$0.00	Vendor ID		
Secondary Account ID		Vendor Name		
Amount Secondary	$0.00			

PO Number – enter the PO number used to purchase this piece of equipment.

Invoice Number – enter the Invoice Number used when purchasing this piece of equipment.

Unit Cost – enter the cost of the unit.

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Primary Account ID – enter the Primary Account Number used when purchasing this piece of equipment.

Amount Primary – enter the dollar amount used when purchasing this piece of equipment against this account number.

Secondary Account ID – enter the Secondary Account Number used when purchasing this piece of equipment.

Amount Secondary – enter the dollar amount used when purchasing this piece of equipment against this account number.

Life Expectancy – enter the life expectancy for this asset. This becomes a valuable tool when generating an Asset General or Asset Detailed Report indicating which assets will reach their life expectancy during the specified date range. This is based on life expectancy from the Acquisition Date.

Acquisition Date – enter the date the asset was purchased.

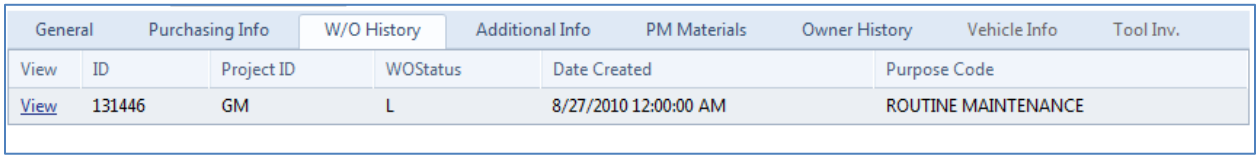
Warranty Expiration Date – enter the date the warranty expires for this asset. This becomes a valuable tool when generating an Asset General or Asset Detailed Report indicating which assets will reach their warranty expiration during the specified date range.

Date Placed In Service – enter the date the asset was placed in service.

Vendor ID – enter or select the Vendor ID you purchased this asset from.

Vendor Name - enter or select the Vendor name you purchased this asset from.

Work Order History Tab



The Work Order History tab shows the work orders that have been generated against this asset. This is valuable when you are looking at how much it is costing you to maintain a piece of equipment. Click on the **View** link to take you to that work order on the Work Order Form.

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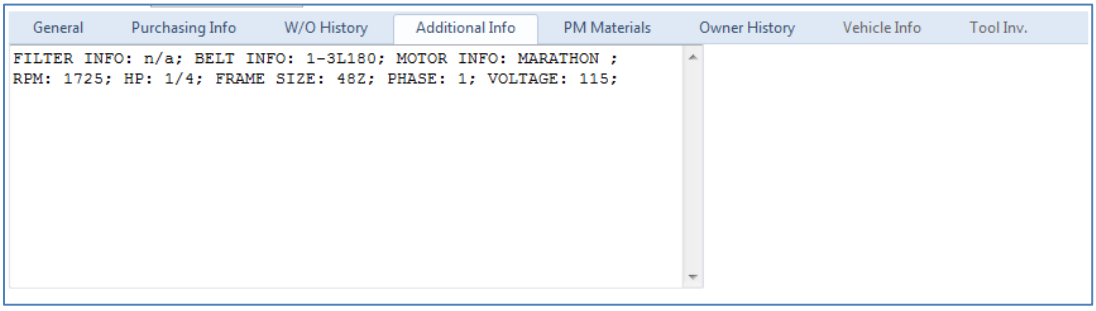
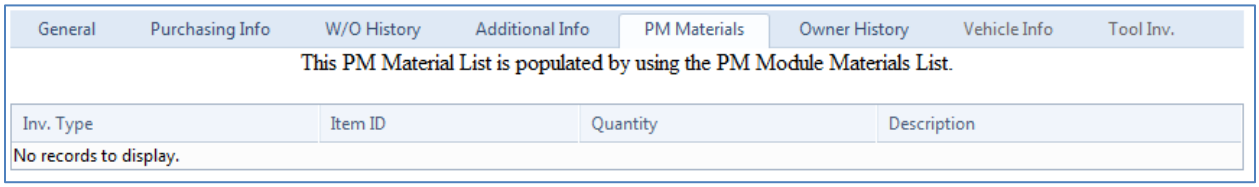
Additional Info Tab



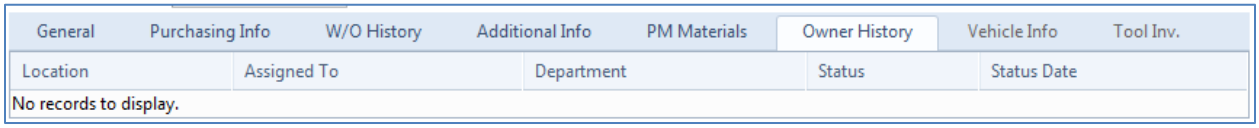
The Additional Info Tab allows you to keep any other information regarding this asset.

PM Materials Tab



The PM Materials List Tab shows you the materials needed to PM this piece of equipment. The PM materials are populated on this form when they are entered when creating a PM Schedule for this asset. This is a read-only form from here. If you need to modify or add to this materials list for this asset, it needs to be done so through the PM Schedules form.

Ownership History Tab



The Ownership History Tab will show you a history of change of location, new department, new assignment, new employee assignment and Asset Status changes.
NOTE: The Track Ownership check box needs to be checked to view this tab.

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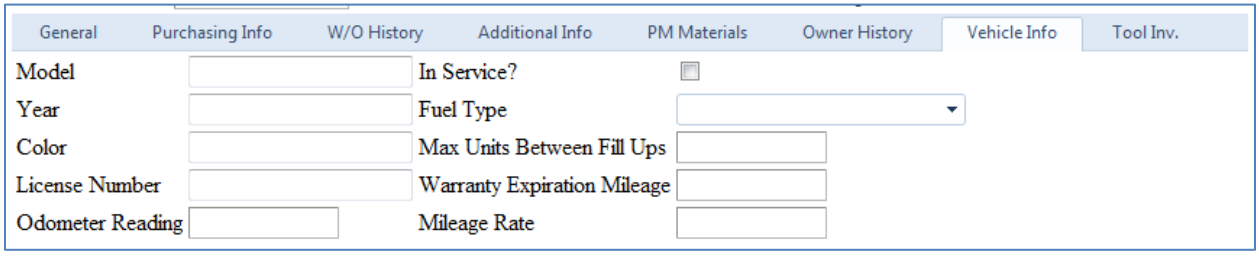
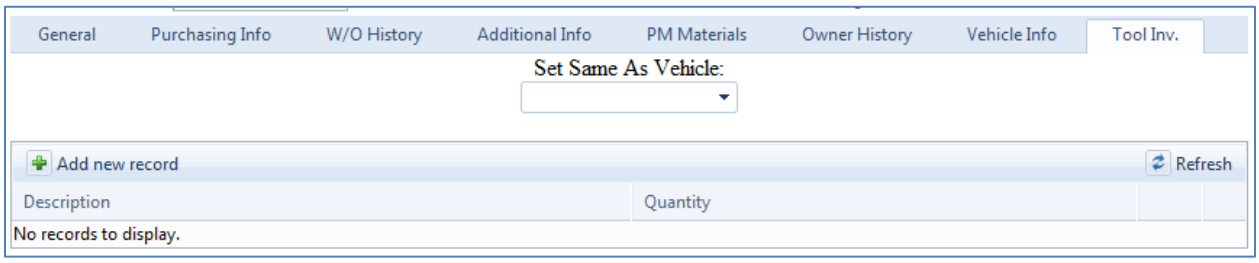
Vehicle Info Tab



The Vehicle Info Tab will show you the Model, Year, Color, License Number and Odometer Reading. It also has fields for Fuel Type, Max Units Between Fill Ups, Warranty Expiration Mileage and Mileage Rate. *NOTE: The Vehicle check box needs to be checked to view this tab.*

Tool Inventory Tab



The Tool Inventory Tab shows you a description and quantity of tools located on that asset.

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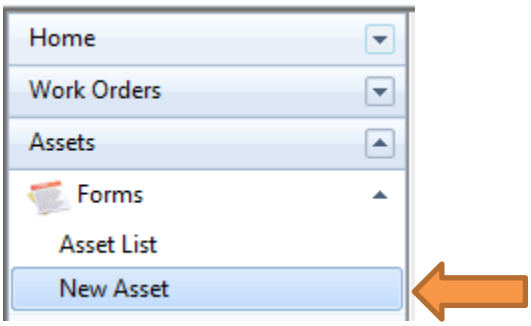
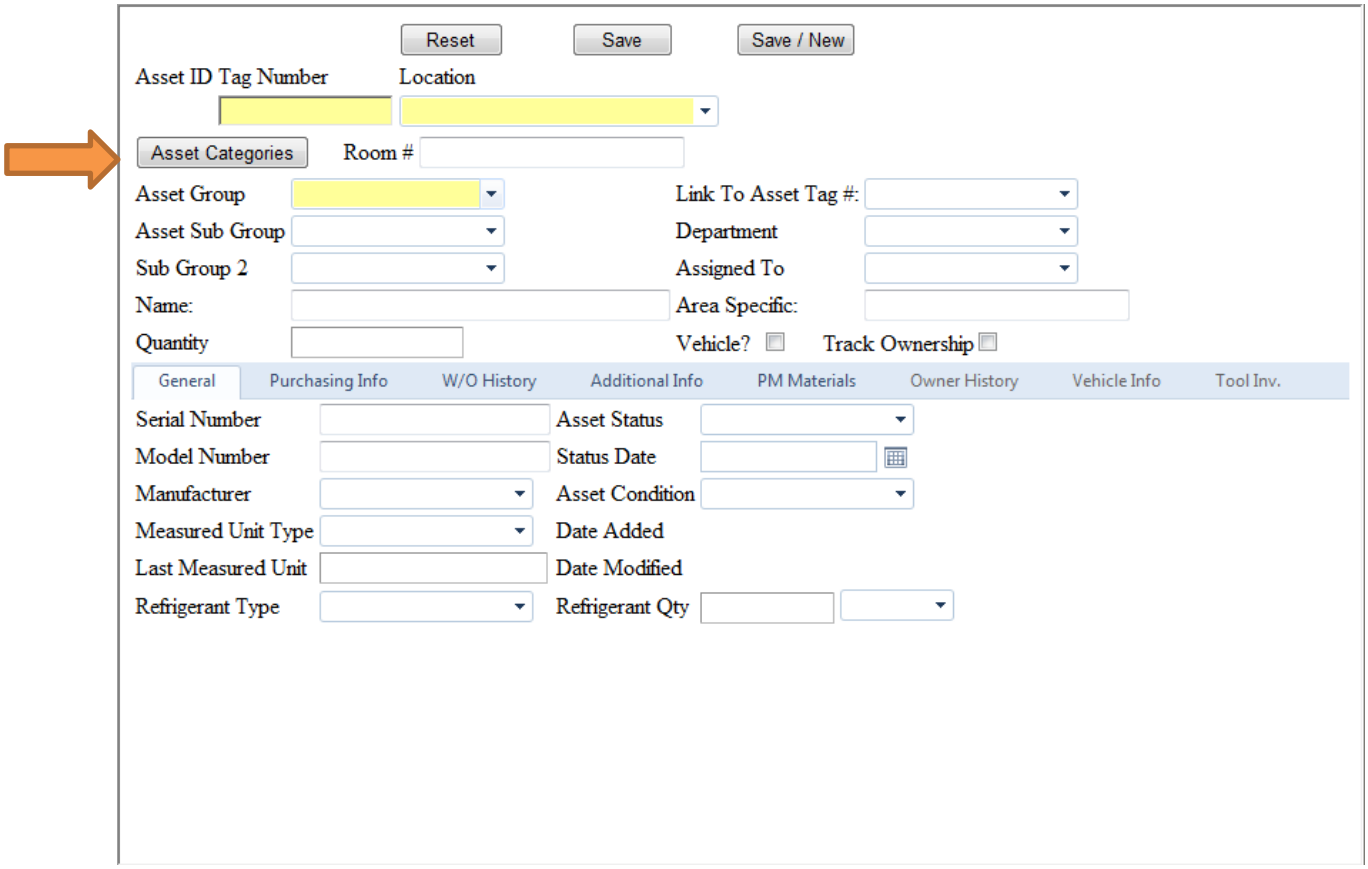
Asset Categories

Asset Categories are broken down into **Asset Groups**, **SubGroups** and **SubGroup2**. To add a new **Asset Group**, click Assets from the main menu and Select New Asset.



This will yield the New Asset Form as shown below.
Click Asset Categories to continue.



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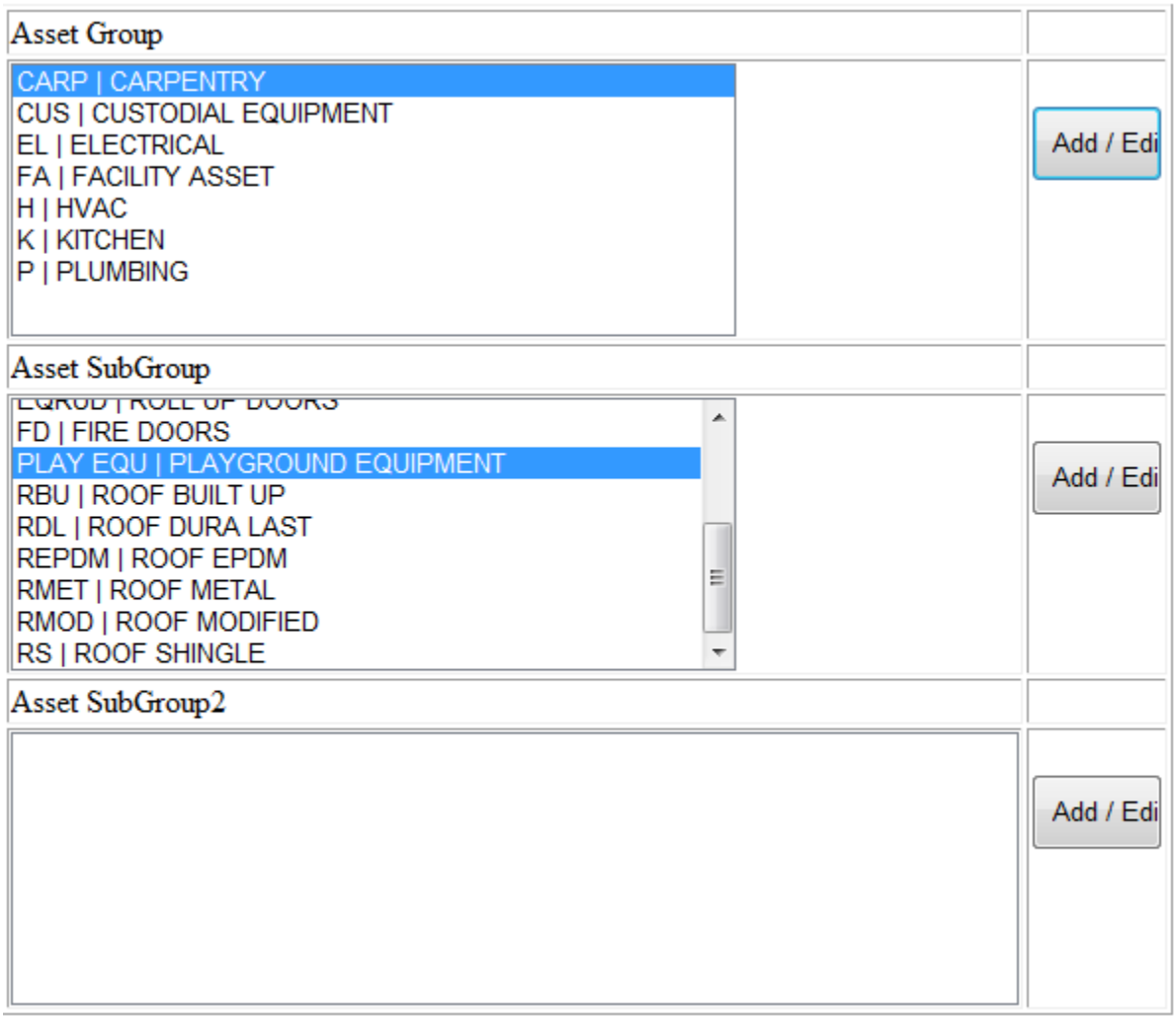
The next screen will be the Asset Categories Screen showing **Asset Group**, **Asset SubGroup** and **Asset SubGroup2**. From here Users can Add, Edit, or Delete each of these Asset Categories.



Adding a new Asset Group

Click on the Add/Edit button on the **Asset Group** portion of the Asset Categories Form.

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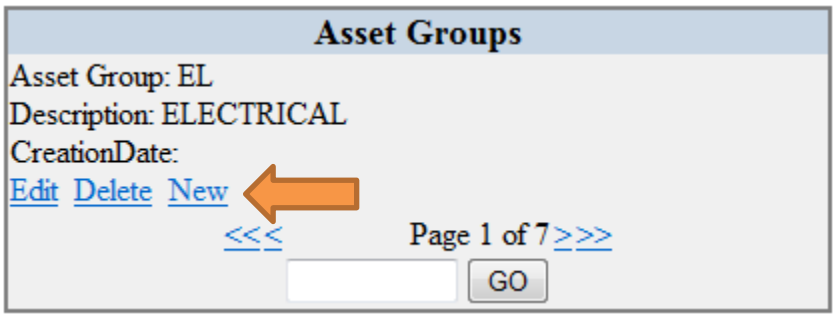
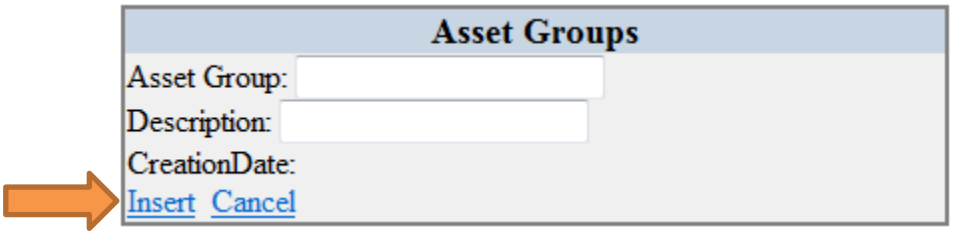
The following form will appear:

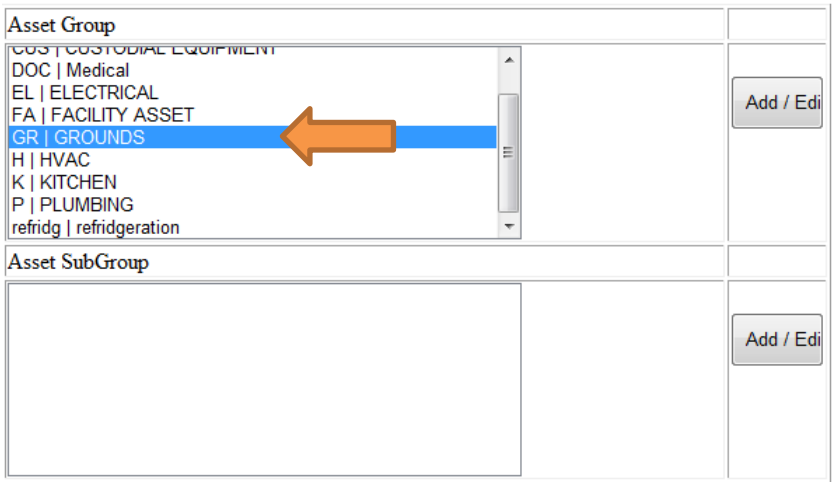


Select New.



Enter an **Asset Group Code** then a Description for that Group. Once you've entered them, simply click the Insert button to close the form and your new **Asset Group** will be added.

Your new Asset Group has been added. You can now create a **SubGroup** for that Group.



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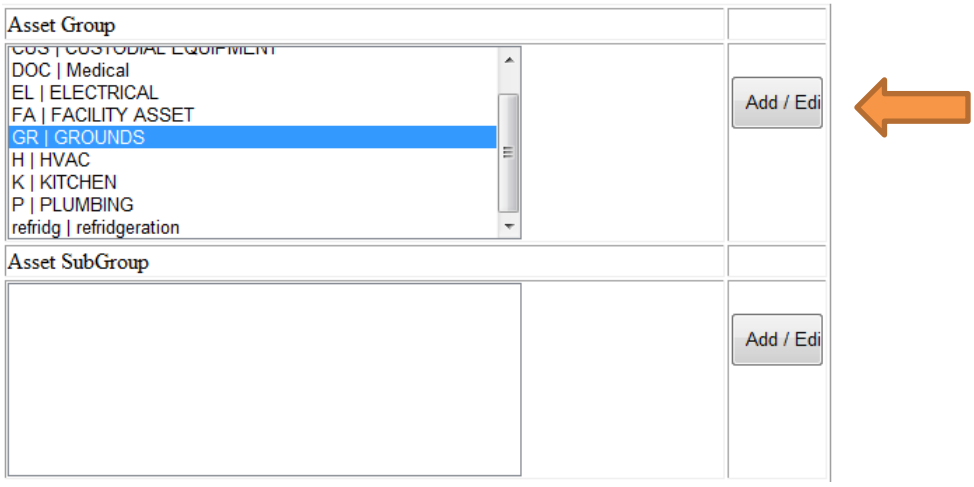
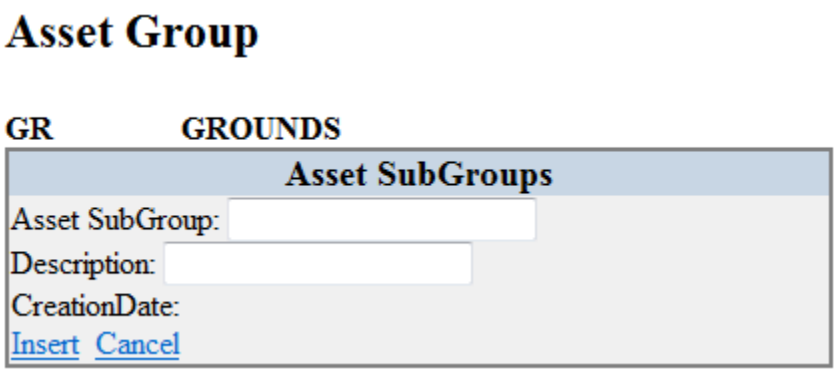
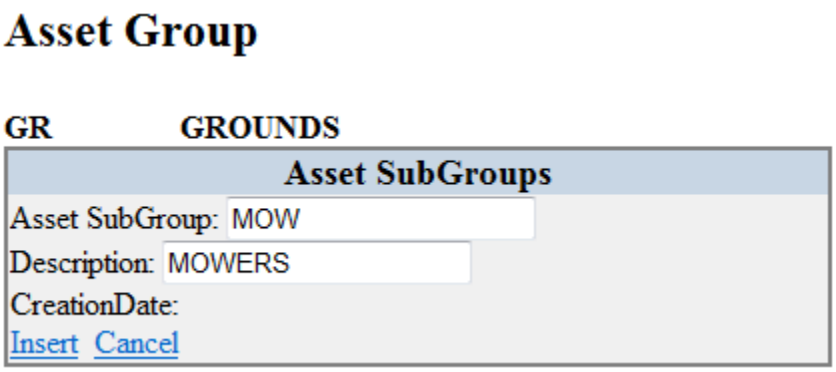
Adding a new SubGroup

You'll see the Asset Group you are adding a **SubGroup** to at the top of the form. Click on the Add/Edit button.





Enter an Asset **SubGroup** Code and Description. Click the Insert button to close the form.



You can now add a SubGroup2 to that **SubGroup**.

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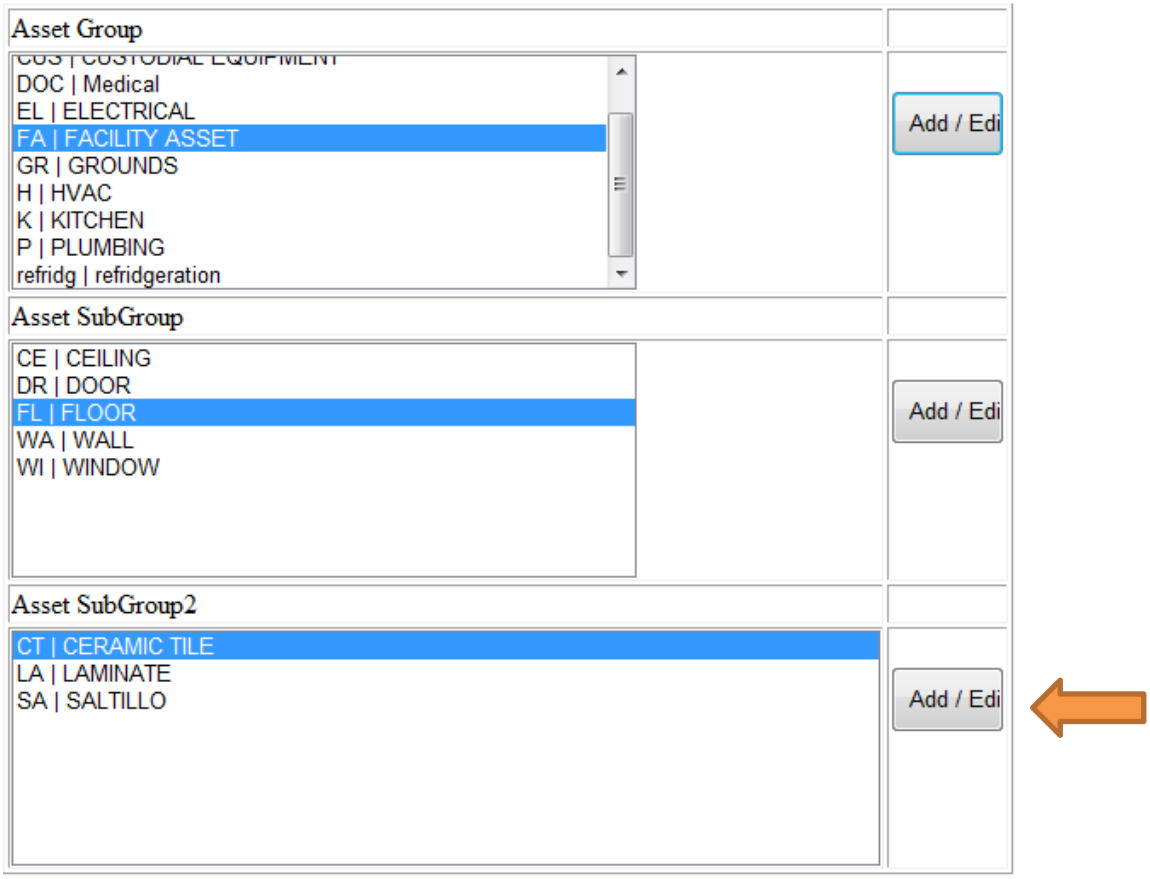
With your Asset Group and **SubGroup** Selected, you can see any **SubGroup2** categories which are sub categories of your **SubGroup**, allowing you to break down your **SubGroup** another level. *An example would be if you have different types of floors.*



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Adding a SubGroup2

Click on Add/Edit next to Asset SubGroup2. Select New and enter a **SubGroup2** Code and Description. Click Insert to close the form and your new Asset SubGroup2 will be added

Asset SubGroup

FL **FLOOR**

Asset SubGroups2

Asset SubGroup2: ST

Description: STONE

CreationDate:

Insert Cancel

Customer Support:

Email: Support@goTeamWORKS.com

Telephone: Toll Free (866) 892-0034

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