

Equipment Setup

AiM

2016

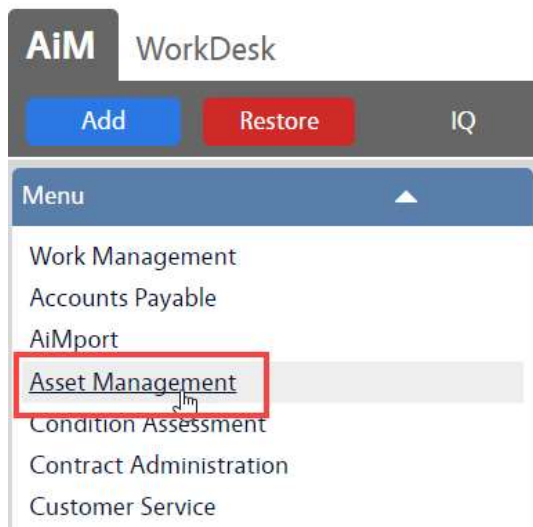
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Table of Contents

Equipment Setup	5
Equipment Rate Type	6
Equipment Group	7
Attributes	8
Rental Rates	8
Parts List	9
Equipment Profile	11

Equipment Setup

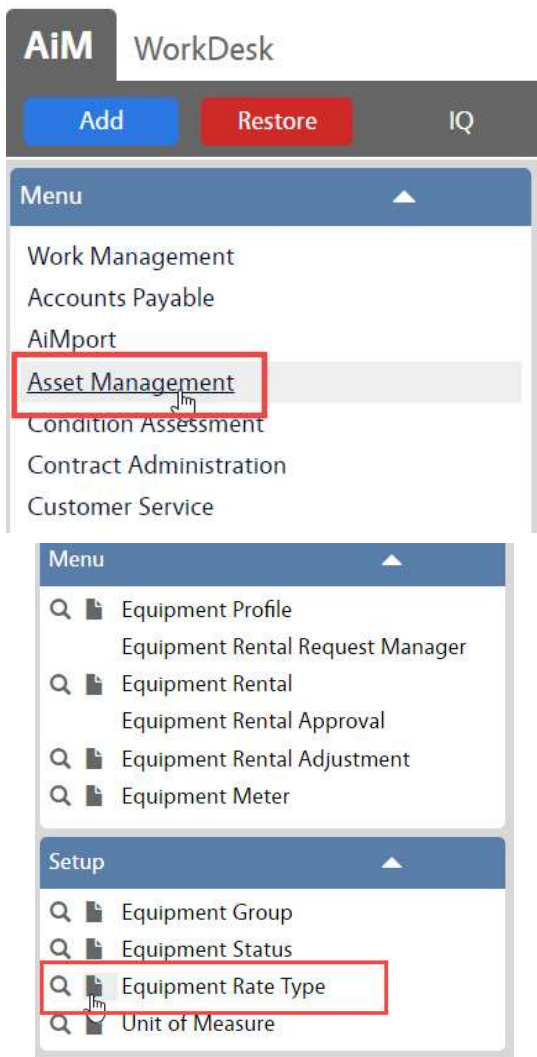
Equipment is managed in the Asset Management Module.




The items listed below must be created in order to create equipment records. They only need to be created once.

- Equipment Rate Type
- Equipment Group
- Equipment Status
- Equipment Profile

Equipment Rate Type




- On the WorkDesk Menu, click on Asset Management

- Under the Setup menu, click  next to Equipment Rate Type

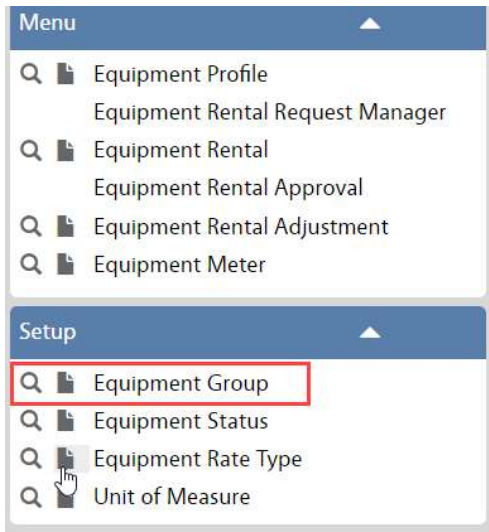
The screenshot shows the 'Equipment Rate Type' setup form. It has a header with 'AiM' and 'Equipment Rate Type', and a user profile 'ANNA' with 'About' and 'Logout' links. Below the header are 'Save', 'Cancel', and 'Reset' buttons. The main form area has a table with columns: Rate Type, Description, Frequency, Zero Rate, and Active. There are two rows of data.


Rate Type	Description	Frequency	Zero Rate	Active				
Daily	1	2	365	3	Yes	4	Yes	5
Weekly			52	Yes	Yes			

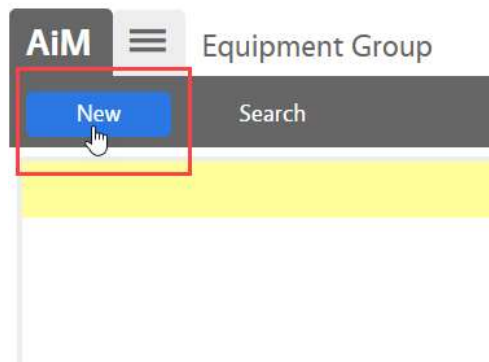
1. Rate Type – rate identifier
2. Description of the rate
3. Frequency – How many times in 1 year does this occur. Used to calculate charges.
4. Zero Rate – Can this rate have a charge rate of \$0.00
5. Active – Can it be used or not.
6. Click 

Equipment Group

- Each piece of equipment must be assigned to an Equipment Group.
- Equipment Group defines the attributes to be documented for each item.
- Equipment Group defines the Rate Types for each item.




- Under the Setup menu, click  next to Equipment Group



- Click 

The screenshot shows the AiM 'Equipment Group' form. The form has a header with 'AiM Equipment Group' and 'ANNA About Logout'. Below the header are 'Save' and 'Cancel' buttons. The form contains several fields:

- Group Identifier:** A text field containing 'Radios' with a red box and the number '1' next to it.
- Description:** A text area with a red box and the number '2' next to it.
- Active:** A dropdown menu with 'Yes' selected, a red box, and the number '3' next to it.
- Attributes:** A section with a red box and the number '4' next to it, containing a table with columns: ID, Label, Sequence, Required, Field Type, Field Length, Decimal Precision, Initial Value, and Active. An 'Add' button is next to the table.

1. Group Identifier
2. Description of the group
3. Active or Inactive
4. Click  for Attributes

Attributes

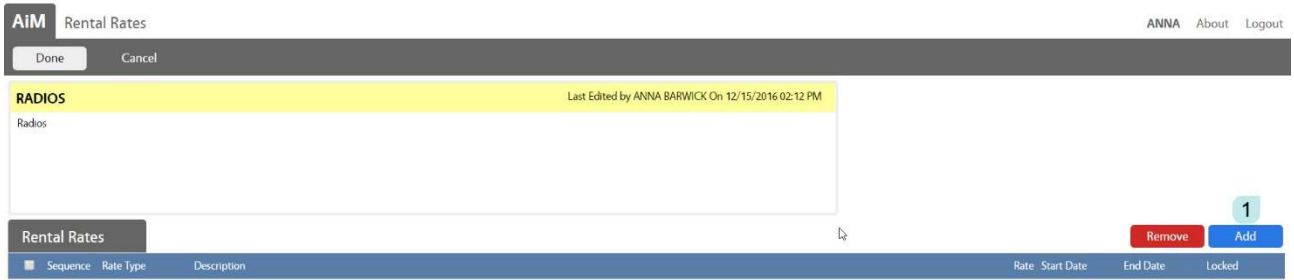
*Attributes define what information needs to be collected for this equipment group. Each group can have different attributes.

1. Label – What is the identifier for this attribute
2. Sequence – What order should it appear in the list
3. Required – Yes or No
4. Field Type
 - a. String – Can include letters, numbers, and symbols
 - b. Number
 - c. Date
5. Field Length – How many characters can this field take?
6. Decimal Precision – How many numbers after the decimal (for Number fields)
7. Initial Value – a default value
8. Click to return to the previous screen or Click to create another attribute

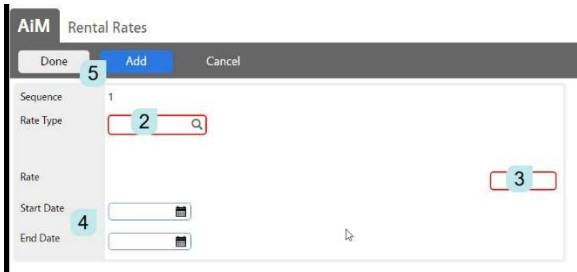
Rental Rates

If the equipment will be released to work orders through the rental process, then a rental rate must be associated to the group.

- On the Equipment Group screen, Click Rental Rates from the View Menu



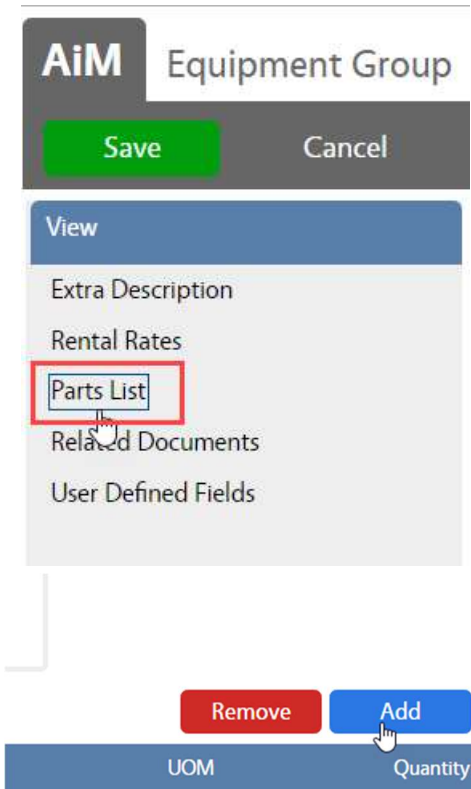
1. Click **Add**



2. Rate type – determines frequency
3. Rate – Charge per frequency
4. Start Date/End Date – if a specific date range applies
5. Click **Done** to return to the previous screen or Click **Add** to create another rate

Parts List

- Can list the parts of the piece of equipment.
- Parts must be items that are tracked in the Inventory module



- On the Equipment Group screen, Click Rental Rates from the View Menu

- Click **Add**

AiM Parts List

Done 3 Add Cancel

Part 1

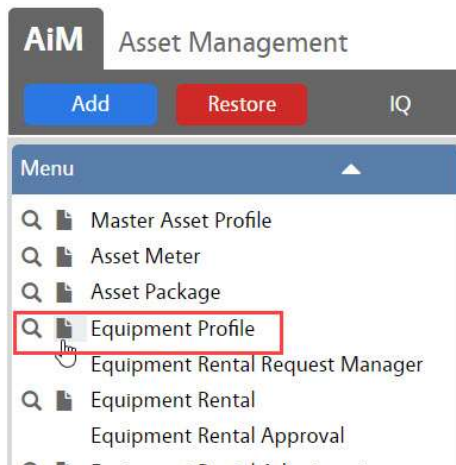
UOM

Quantity 2

1. Choose an inventory part
2. Enter the quantity used
3. Click to return to the previous screen or Click to list additional parts.
4. Click to return to the Equipment Group screen.
5. Click

Equipment Profile

Equipment is used for tools and pieces of equipment that needs to be assigned to a specific person or “rented” and charged on a Work Order.



- Under the Menu, click  next to Equipment Profile

AiM Equipment Profile

Buttons: Save, Cancel

ANNA About Logout

View

3798 Last Edited by ANNA BARWICK On 12/16/2016 03:25 PM

1

2

3

4

5

6

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1

1. Title Block
 - Equipment Identifier – Once created this cannot be changed
 - Description of equipment

Region	<input type="text"/>	2
Facility	<input type="text"/>	
Property	<input type="text"/>	
Location	<input type="text"/>	
Warehouse	<input type="text"/>	
Bin	<input type="text"/>	
Shop	<input type="text"/>	3
Primary Person	<input type="text"/>	
PM Route	<input type="text"/>	
Route Sequence	<input type="text"/>	
Contractor	<input type="text"/>	4
Address Code	<input type="text"/>	
Service Contract	<input type="text"/>	
Edit		5

2. Location Block

- Enter either the Building information OR the Warehouse information.
- One of the sections must be completed, but not both.
- *In order to list the item in the Warehouse, the piece must be setup as an Inventory part first and assigned to a Bin in the Inventory Module*

3. Shop Block

- Shop – Responsible Shop
- Primary Person – Responsible Person

4. Contractor Block

- Allows identification of a contractor who services the equipment.
- If the service is tied to a service contract in AiM, it can be noted here.

5. Picture Block

- A picture of the item can be loaded

Status	AVAILABLE <input type="text"/> <input type="button" value="Q"/>	6
Equipment Group	<input type="text"/> <input type="button" value="Q"/>	
Rentable	No <input type="button" value="v"/>	
Lockout/Tagout	No <input type="button" value="v"/>	

6. Status Block
 - Status Options
 - Available
 - Issued
 - Out for Repair
 - Returned
 - Inactive
7. Equipment Group – required
8. Rentable – Can this item be charged to a Work Order through the Equipment Rental screens
9. Lockout/Tagout
 7. Click

Additional Screens for Additional Information

View
Extra Description
Reference Data
Attributes
Relocation
Parts List
Account Setup
Warranty
Active PM Templates
Equipment Meter
Sales Price History
Notes Log
User Defined Fields
Status History
Related Documents

- Extra Description – available for long descriptions
- Reference Data –
 - Parent Equipment
 - Manufacturer
 - Part #
 - Serial #
 - Original Cost
 - Sale Cost
- Attributes – setup on the Equipment Group
- Relocation – Lists the movement of the equipment
- Parts List – pulls from Equipment Group
- Account Setup
- Warranty
- Active PM Templates – lists templates equipment is tied to
- Equipment Meter – lists meter readings
- Sale Price History