



# The Asset Czar's Toolkit

Presented By: Justin Husted





# Justin Husted

Professional Services – Project Manager

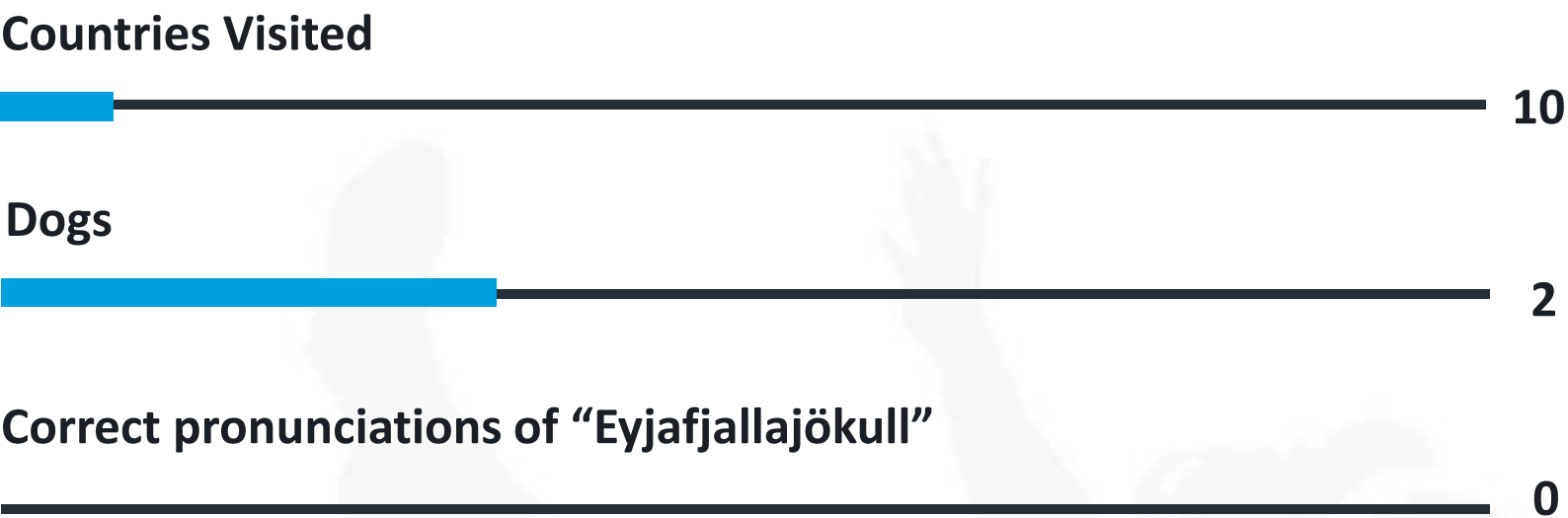


## About Justin Husted

*Focus: O&M, CPPM, AiM IQ*

*Background: Business Intelligence, Healthcare, Education*

*Hobbies: Snowboarding, Long distance cycling, Board Games*



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# Agenda

- Overview
  - Definitions
  - Process
  - Tools
  - Asset Management in AiM
  - Go Asset Management
  - AssetSync
- Leveraging the Tools
  - Building a Better Process
  - Return on Investment



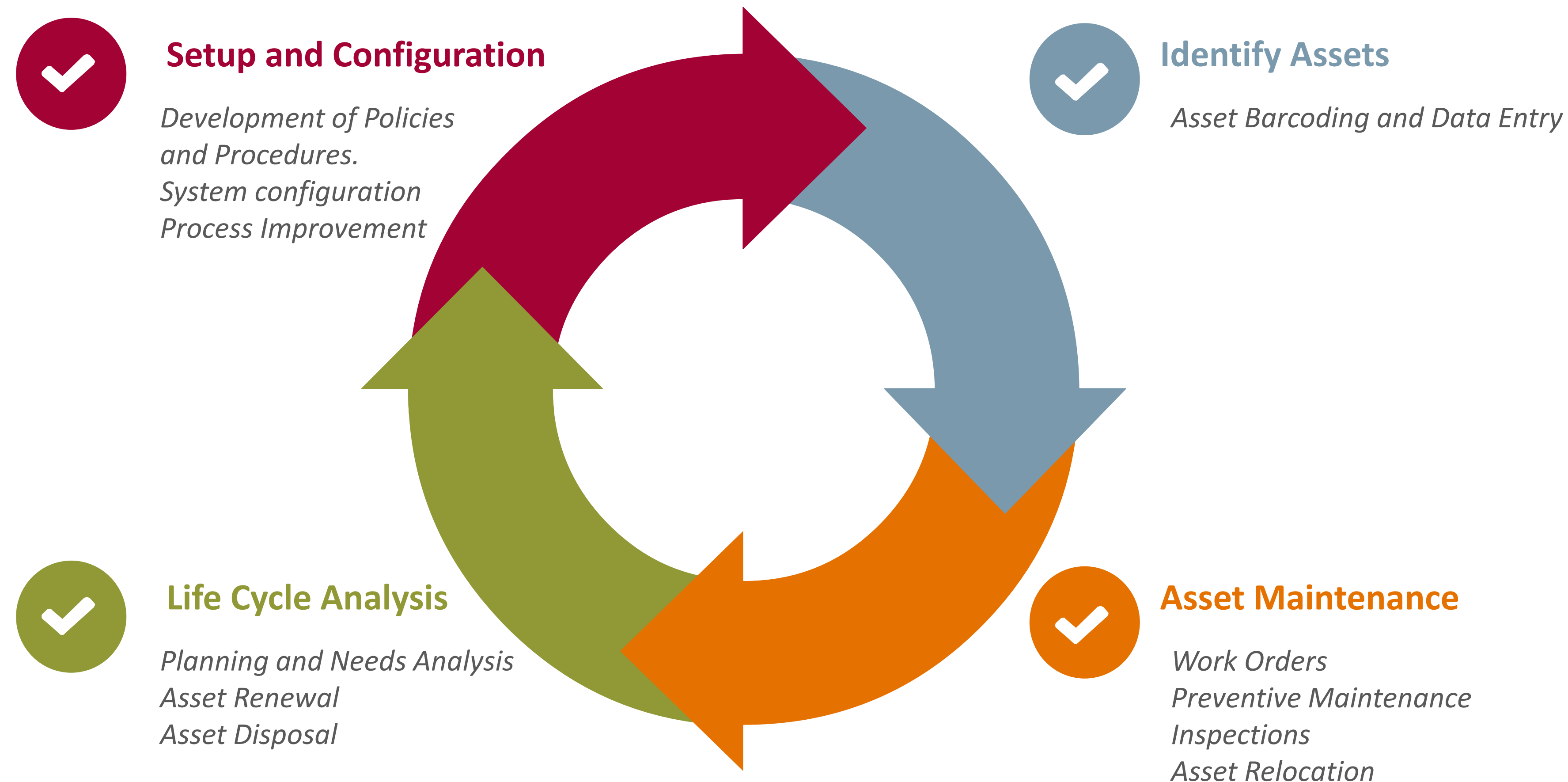
# Overview

# Definitions

AiM Title	Definition	Examples
Asset	An item of value that is owned by the institution. Assets in AiM are typically physical assets that are required to be tracked for financial purposes (e.g. all assets >\$1000) and/or require routine preventive maintenance. In AiM, Assets can be components of other assets.	<ul style="list-style-type: none"> <li>• Building</li> <li>• HVAC System</li> <li>• Cooling Subsystem</li> <li>• Air Handling Unit</li> <li>• Fan Wall</li> </ul>
Asset Czar	<p>The individual who is tasked with ensuring that asset information is complete, correct and up to date (i.e. asset data integrity). This person likely is involved in developing the policies (e.g. what is considered an asset, how is it classified and grouped) and procedures (e.g. what is the process for recording a new asset) for asset management or has deep knowledge of these policies and procedures.</p> <p>This person may also be in charge of developing and modifying PM templates and running the PM generator.</p>	<ul style="list-style-type: none"> <li>• Asset Manager</li> <li>• Preventive Maintenance Coordinator</li> </ul>
AiM	Intelligence within Asset Management. The desktop version of the IWMS solution provided by AssetWorks. In addition to being the desktop front-end, AiM is also where all of the configurations (types, groups, statuses) are setup and maintained.	
Go Asset Management	One of the six mobile applications provided by AssetWorks, Go Asset Management allows for the display, recording and modification of asset data. Inspections, asset relocations and meter readings are also available within the app.	
AssetSync	A front-end solution for bulk export and import of asset data. Assetsync includes validation and review features that assist in maintaining data integrity.	

# The Asset Management Process

## *A High Level Overview*





# Asset Collection Tools

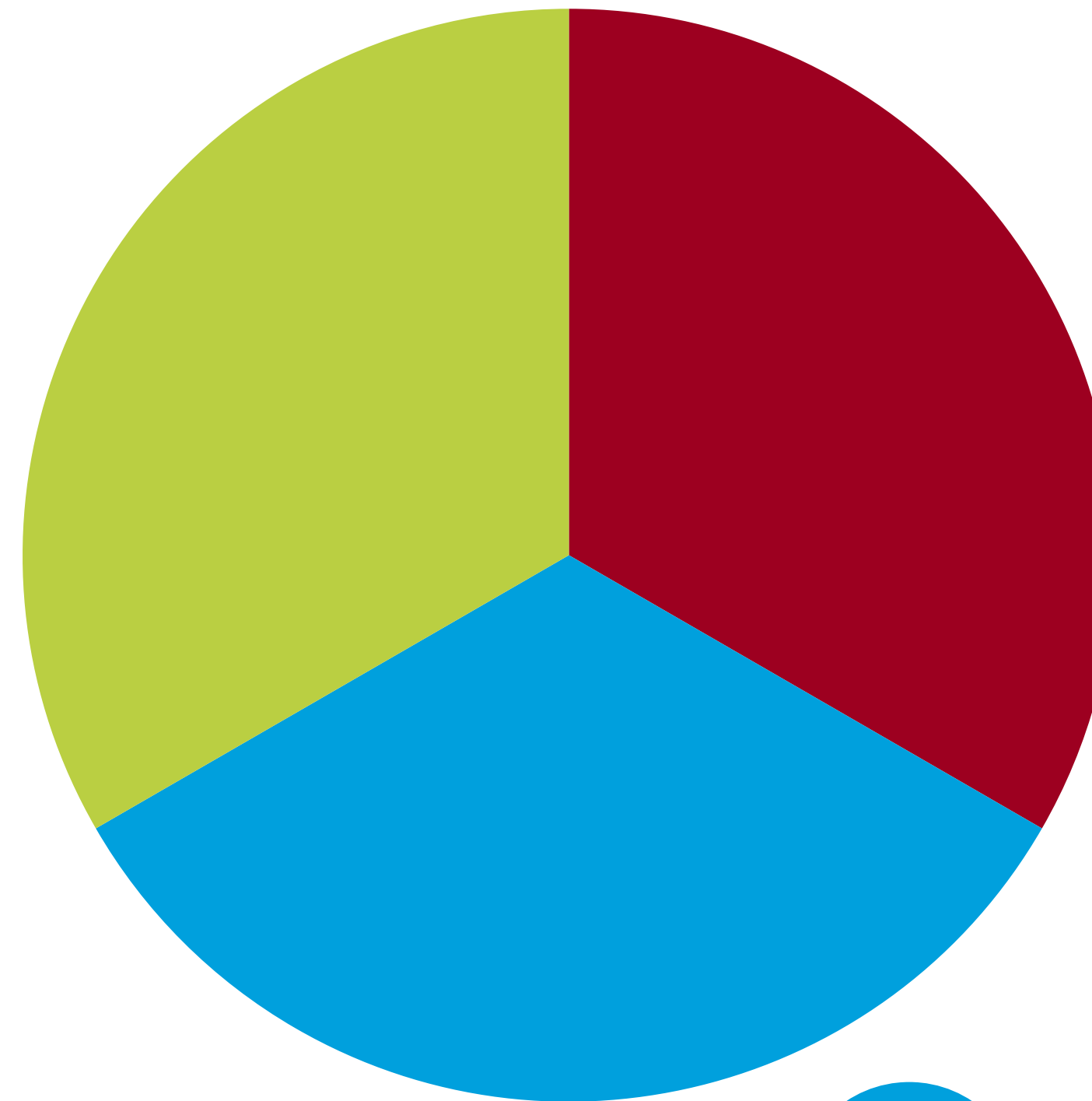
## Go Asset Management

*Creation of New Assets out in the field*



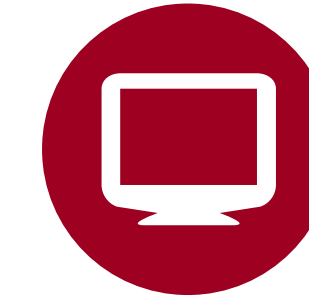
**Advantages:** One step barcoding and data collection process. Easy to add images.

**Disadvantages:** Difficult to capture complex info, upload documents



## AiM

*Hand-keying of Assets from a desktop computer.*



**Advantages:** Easier to collect complex, custom data. Easiest way to upload documentation (manuals, warranties, etc).

**Disadvantages:** Time consuming, one-by-one manual entry. Asset barcoding becomes a separate process. More challenging to add images.

## AssetSync

*Bulk Import of Assets*



**Advantages:** Quickest way to add/change many assets (including PM templates!). Loading and validation processes do not require an IT resource (no coding languages required).

**Disadvantages:** Asset barcoding, photos and documents become separate processes.

# Toolkit Overview



# AiM - Asset Screen

The screenshot displays the AiM Asset Screen in a web browser. The browser's address bar shows 'www.website.com'. The application interface has a top navigation bar with 'Edit', 'New', 'Search', and 'Browse' buttons. A left sidebar contains a menu with categories like 'Action' (ViewFinder, Copy, Email, Print), 'View' (Extra Description, Reference Data, Classification Standard, Attributes, Relocation, Account Setup, Utility Meter Information, Warranty, Parts List, Active PM Templates, Meters, Locations Served, Vehicle Information, Condition Assessment, Condition Assessment, Risk Management, Financial Information, Employees, Replacement Tag History), and a 'Component Asset' section. The main content area shows details for asset '1002', an 'Air Handling Unit', last edited by ROOT on 03/08/2019 03:02 PM. The details are organized into sections: Region (CENTRAL), Facility/District (ANCHORAGE), Property (101EX), Location (Security Filter Example - Central Anchorage District), Warehouse, Bin, PM Route, Route Sequence, Lockout/Tagout (No), Manufacturer, Model, Serial Number, Part, Status (ACTIVE), Asset Type (SERIALIZED), Asset Group (AIR HANDLERS), Rentable (No), and Replacement Tag. At the bottom, a 'Component Asset' table lists one component.

Sequence	Asset	Description	Asset Type	Asset Group	Replacement Tag	Status
1	1006	FAN Coil Unit	SERIALIZED	FAN COIL UNITS		ACTIVE



*More detailed asset information is viewable here:*

- Condition Assessment Data*
- Financial Data*
- Asset Classification (e.g. UNIFORMAT II)*
- Warranties*
- Asset History/Audit Trail*
- Related Documents (e.g. manuals)*
- Related Work Orders (Viewfinder)*

# Go Asset Management

## Assets

*Review Existing Assets or  
Create/Modify assets out in the field*



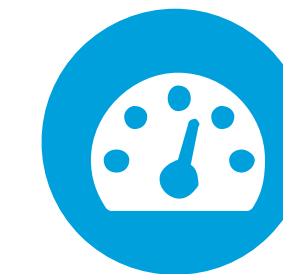
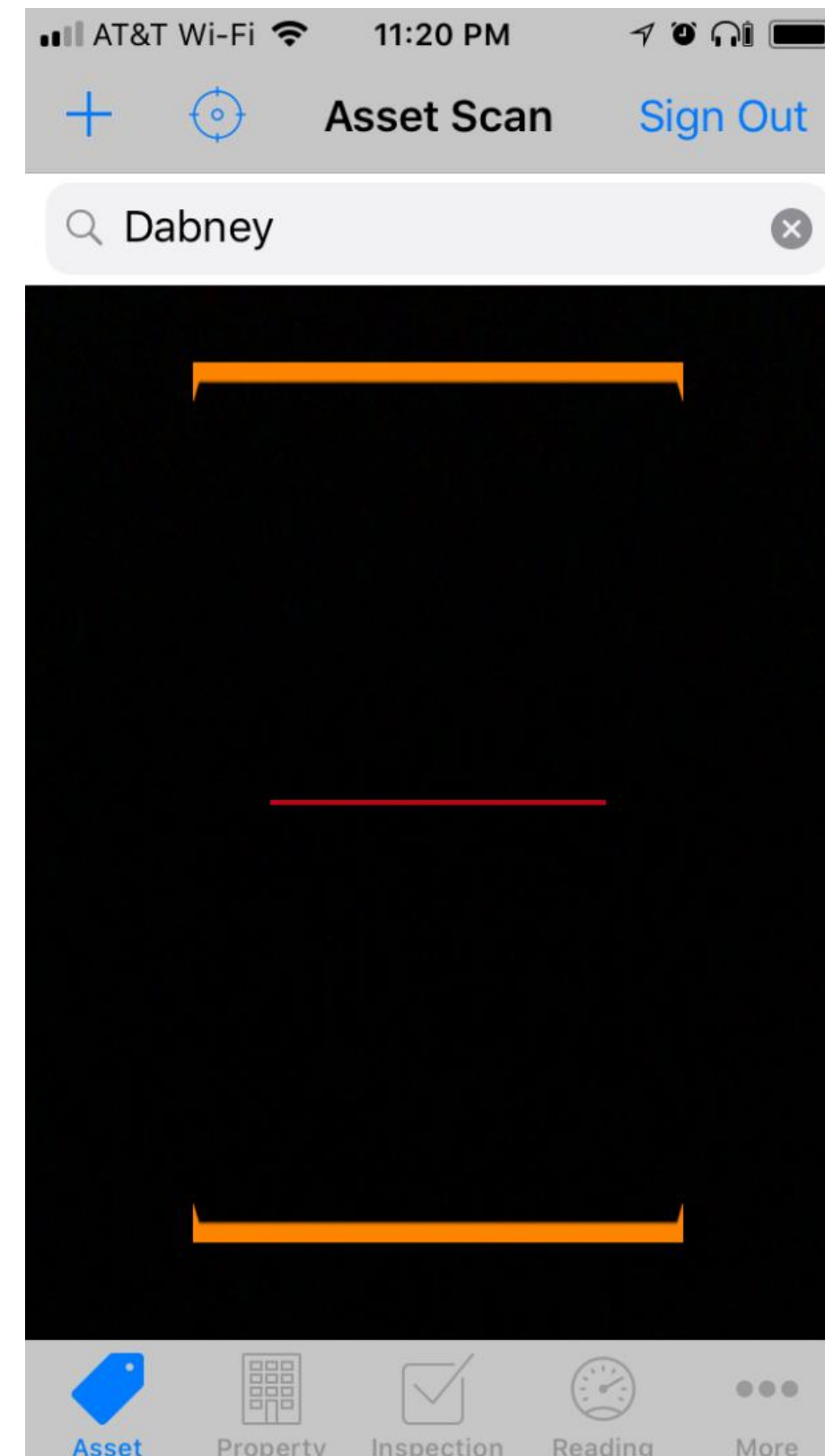
## Property

*Review all assets by property. Ensure  
that asset information is complete.  
Verify assets or even relocate assets  
from one room to another by simply  
scanning a barcode.*



## Inspections

*Process inspections or create new ones  
right from the app!*



## Meter Readings

*Enter single meter readings or walk  
from meter to meter along a route.*



## More!

*Barcode scanning, Offline capability,  
Geolocation and more!*

# Load Sheet Example

www.website.com

export.xlsx - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW Justin Husted

Paste Cut Copy Format Painter

Calibri 11 A A Font

Wrap Text Merge & Center Alignment

General \$ % .00 Number

Conditional Formatting Format as Table Cell Styles Styles

Insert Delete Format Cells


AutoSum Fill Clear Editing

Sort & Find & Filter Select Webex Share This File Webex

A12

	A	B	C	D	E	F	G	H	I	J	K	L
1	asset_tag	new_aim_asset	description	asset_type	asset_group	status_code	rentable_yn	tag_number	region_code	fac_id	bldg	location
2	00000154	N	CHILLED WATER PUMP.	MECHANICAL	PUMPS	PENDING	N		DEFAULT	DEFAULT	DEFAULT	DEFAULT
3	00000155	N	CHILLED WATER PUMP	MECHANICAL	PUMPS	ACTIVE	N		DEFAULT	DEFAULT	DEFAULT	DEFAULT
4	00001678	N	EMERGENCY GENERATOR	MECHANICAL	GENERATOR	ACTIVE	N		DEFAULT	DEFAULT	DEFAULT	DEFAULT
5	00001690	N	FIXED EMERGENCY GENERATOR (DIESEL)	MECHANICAL	GENERATOR	ACTIVE	N		DEFAULT	DEFAULT	DEFAULT	DEFAULT
6	00001703	N	EMERGENCY GENERATOR	MECHANICAL	GENERATOR	ACTIVE	N		DEFAULT	DEFAULT	DEFAULT	DEFAULT
7	1002	N	Air Handling Unit	MECHANICAL	AIR HANDLERS	ACTIVE	N		CENTRAL	ANCHORAGE	101EX	
8	1004	N	Default Property Asset	PROPERTY	BUILDING	ACTIVE	N		DEFAULT	ANCHORAGE	101EX	DEFAULT
9	1005	N	HVAC SYSTEM	SYSTEM		ACTIVE	N		DEFAULT	DEFAULT	DEFAULT	DEFAULT
10	1006	N	FAN Coil Unit	MECHANICAL	FAN COIL UNITS	ACTIVE	N		DEFAULT	DEFAULT	DEFAULT	DEFAULT
11												
12												
13												
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20												
21												

ASSETS ATTRIBUTES UDF CHILDREN VIRTUALS LOCATIONS PM TEMPLATES CAPITAL I ... READY

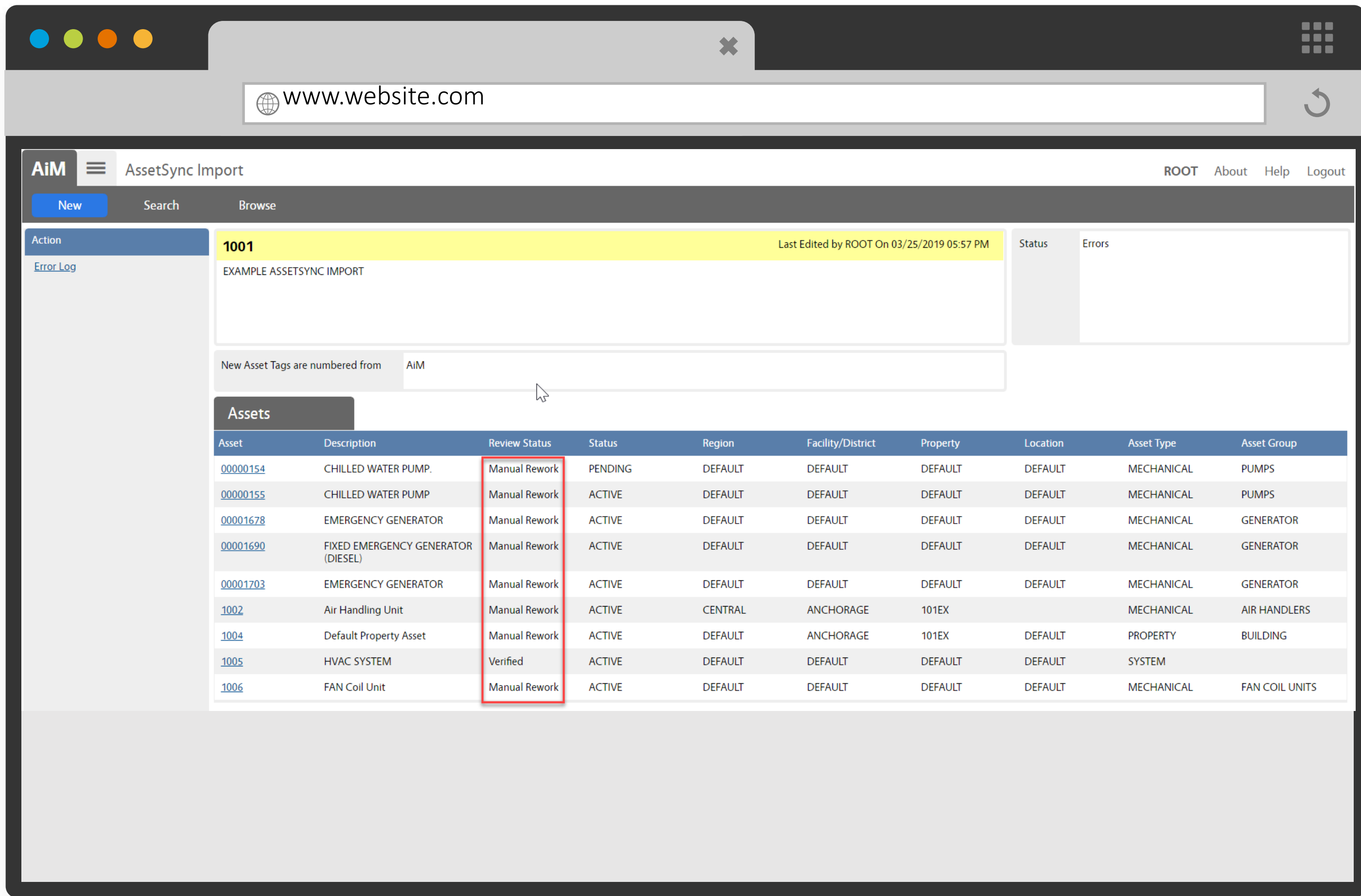
 *Modify existing asset information by exporting AssetSync data to MS Excel. Then import the spreadsheet, changes will take effect after review/validation.*

*Note there are a number of tabs at the bottom used for changing other asset information.*



# AiM – AssetSync

## Asset Validation Overview – After Import



The screenshot shows the AiM AssetSync Import interface. At the top, there's a header with 'AiM' and 'AssetSync Import'. Below this, there's a navigation bar with 'New', 'Search', and 'Browse'. The main content area has a left sidebar with 'Action' and 'Error Log'. The main area displays a table of assets. A red box highlights the 'Review Status' column, which contains values like 'Manual Rework' and 'Verified'. The table also includes columns for Asset, Description, Status, Region, Facility/District, Property, Location, Asset Type, and Asset Group.

Asset	Description	Review Status	Status	Region	Facility/District	Property	Location	Asset Type	Asset Group
<a href="#">00000154</a>	CHILLED WATER PUMP.	Manual Rework	PENDING	DEFAULT	DEFAULT	DEFAULT	DEFAULT	MECHANICAL	PUMPS
<a href="#">00000155</a>	CHILLED WATER PUMP	Manual Rework	ACTIVE	DEFAULT	DEFAULT	DEFAULT	DEFAULT	MECHANICAL	PUMPS
<a href="#">00001678</a>	EMERGENCY GENERATOR	Manual Rework	ACTIVE	DEFAULT	DEFAULT	DEFAULT	DEFAULT	MECHANICAL	GENERATOR
<a href="#">00001690</a>	FIXED EMERGENCY GENERATOR (DIESEL)	Manual Rework	ACTIVE	DEFAULT	DEFAULT	DEFAULT	DEFAULT	MECHANICAL	GENERATOR
<a href="#">00001703</a>	EMERGENCY GENERATOR	Manual Rework	ACTIVE	DEFAULT	DEFAULT	DEFAULT	DEFAULT	MECHANICAL	GENERATOR
<a href="#">1002</a>	Air Handling Unit	Manual Rework	ACTIVE	CENTRAL	ANCHORAGE	101EX		MECHANICAL	AIR HANDLERS
<a href="#">1004</a>	Default Property Asset	Manual Rework	ACTIVE	DEFAULT	ANCHORAGE	101EX	DEFAULT	PROPERTY	BUILDING
<a href="#">1005</a>	HVAC SYSTEM	Verified	ACTIVE	DEFAULT	DEFAULT	DEFAULT	DEFAULT	SYSTEM	
<a href="#">1006</a>	FAN Coil Unit	Manual Rework	ACTIVE	DEFAULT	DEFAULT	DEFAULT	DEFAULT	MECHANICAL	FAN COIL UNITS



*Note: Project Team members can also be assigned a delegate when they're going to be out for an extended period of time.*

*To do this, go to System Administration  
> Click Delegate Assignment.*

# AiM – AssetSync

## Asset Validation – Asset Rework Screen After Import

The screenshot shows a web browser window with the URL 'www.website.com'. The application is 'AiM AssetSync Review'. The top navigation bar includes 'ROOT', 'About', and 'Logout'. Below the navigation bar, there are 'Save' and 'Cancel' buttons. The left sidebar contains a 'View' menu with options: 'Attributes', 'Children', 'Virtual Children', 'Locations Served', 'Accounts', 'Offset Accounts', 'PM Templates', 'Capital Projects', 'Reactor Event Handler', and 'User Defined Fields'. The main content area displays the asset details for '00000154', which is a 'CHILLED WATER PUMP'. The asset was last edited by 'ROOT' on '03/25/2019 05:57 PM'. The 'Review Status' is 'Manual Rework' and the 'Batch Number' is '1001'. The asset is currently 'PENDING' and 'MECHANICAL'. The 'Asset Group' is 'PUMPS'. The 'Rentable' status is 'No'. The 'Replacement Tag' is empty. The 'PM Route' is empty. The 'Route Sequence' is empty. The 'Lockout/Tagout' status is 'No'. The 'Extra Description' is empty.

Field	Value
Asset ID	00000154
Asset Name	CHILLED WATER PUMP
Last Edited by	ROOT
Last Edited on	03/25/2019 05:57 PM
Review Status	Manual Rework
Batch Number	1001
Status	PENDING
Asset Type	MECHANICAL
Asset Group	PUMPS
Rentable	No
Replacement Tag	
PM Route	
Route Sequence	
Lockout/Tagout	No
Extra Description	



*Note: Project Team members can also be assigned a delegate when they're going to be out for an extended period of time.*

*To do this, go to System Administration  
> Click Delegate Assignment.*

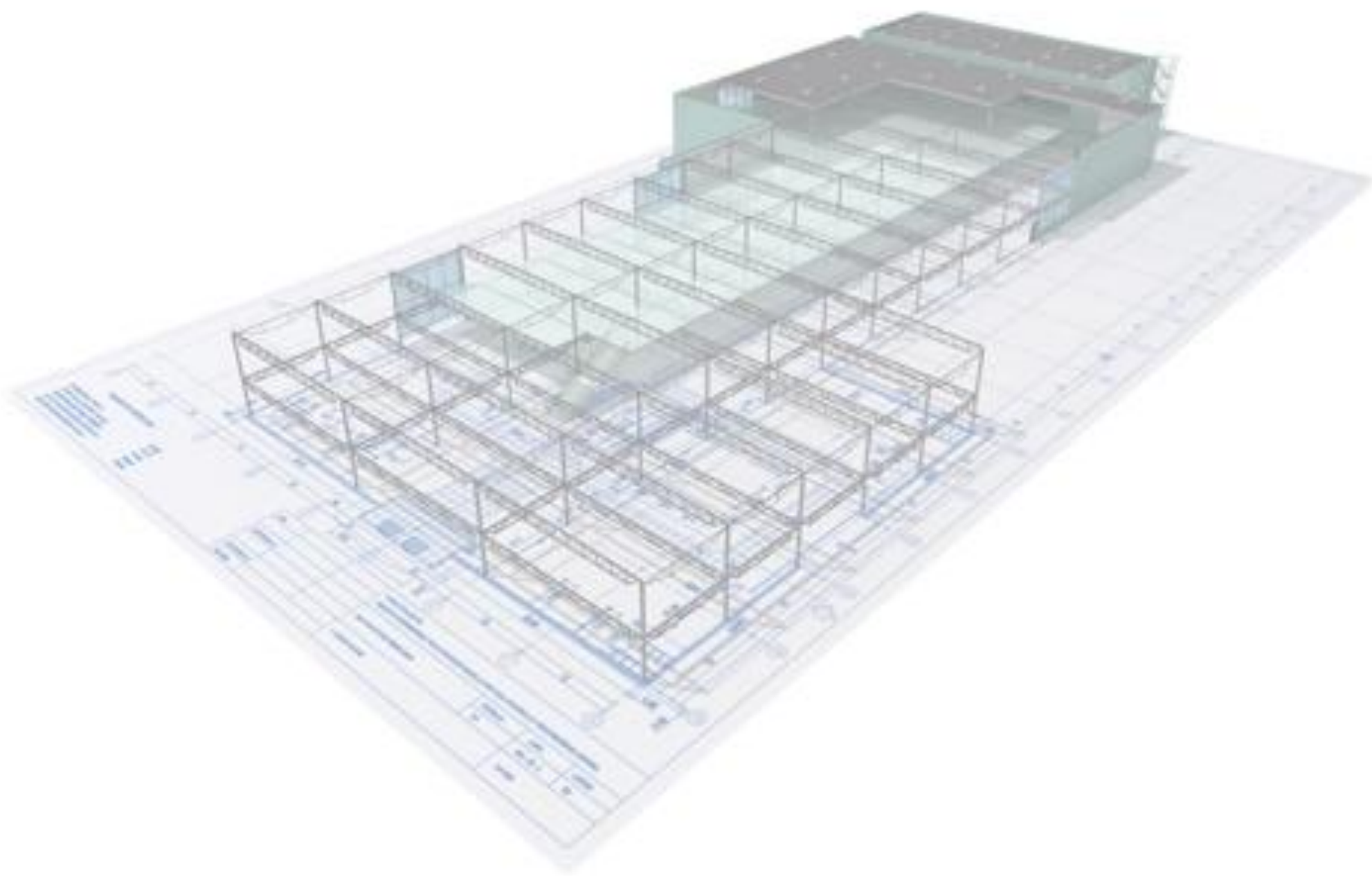
# Additional Information



# Tangible Benefits

## Assessment and Needs Analysis Reduce manual effort of Asset Data Entry

The results of an assessment are typically significant in the volume of asset data. If the data must be manually entered and maintained, it can be quite costly above and beyond the cost of the assessment contract. Utilizing the AiMPort function with the AiM ANA module allow for bulk processing of data.



Automated Asset Data Entry	
Estimated Number of Assets per Building	3000
Number of Buildings	20
Total Number of Assets	60,000
Average Time to Manually Input Updates per Asset	2 min
Data Entry Clerk – Cost/Hr	\$25
Cost to input data	\$50,000
Estimated Cost to run import and error check assuming 10% error	\$12,500
Cost Savings	\$37,500

# Best Practices

## *Prior to Implementation*

### **Map out your existing processes**

*What does asset mean to you?*

*How are assets collected now?*

*What are your asset relocation and disposal processes?*



### **Start the data collection process**

*Do assets exist in another system? Can these be exported?*



### **Make a decision on legacy work orders**

*Migrating in-flight and historical work orders can be an arduous process*



### **Identify PMs**

*Which assets require preventive maintenance?*

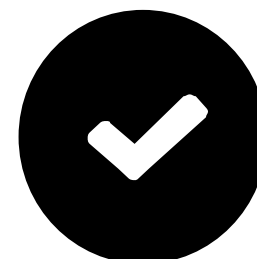
*Do you have PM standards (checklists)?*

*Are checklist items easy to pull into a spreadsheet?*



### **Start to Identify Your Implementation Teams**

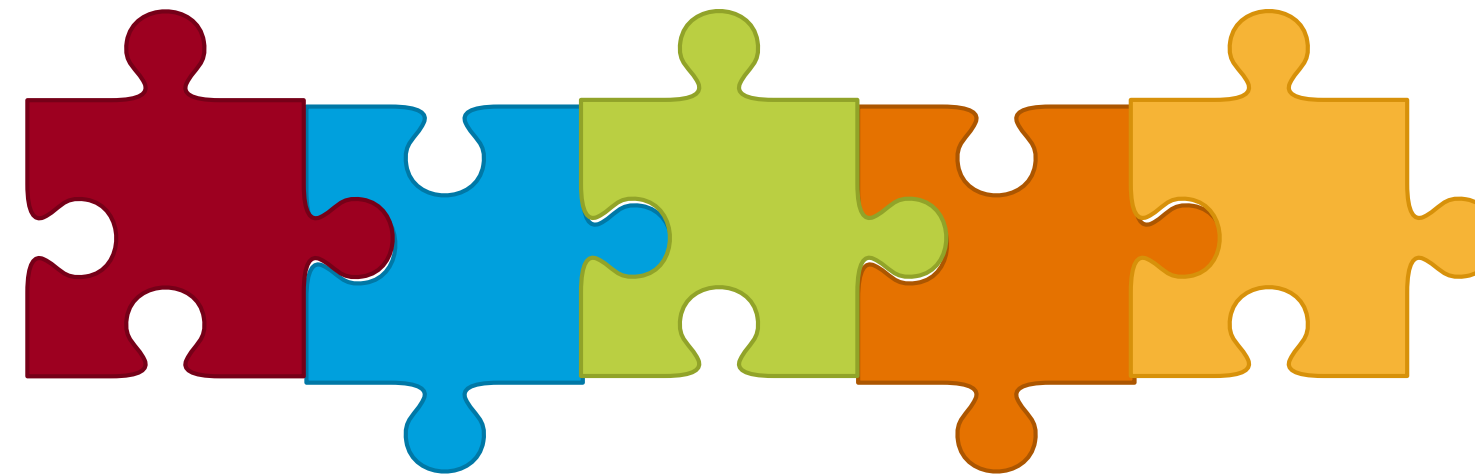
*These will be the key members who will be involved in discussions and decision making.*



**Asset** 2019  
**World**



# Best Practices *During Implementation*



## **Stick with Standards**

*Use AssetWorks recommended asset types and groups as well as industry standard PM checklists. It saves time on data loads, reporting and benchmark comparisons.*



## **Start on Load Sheets Early**

*Development takes time. Gathering data early will help to ensure that data load processes have minimal impact project schedule*



## **Plan your mobile device rollout early**

*Leveraging the Go Apps, asset capture can start in as little as three months after project inception.*



## **Identify Your Asset Czar**

*Having a centralized asset manager has been shown to greatly improve data integrity.*



# Type Examples

## The Typical Asset Types

Type	Also Known As	Example	Note
Serialized	<ul style="list-style-type: none"><li>Barcoded Assets</li></ul>	<ul style="list-style-type: none"><li>Air Handling Unit</li><li>Boiler</li></ul>	
Property		<ul style="list-style-type: none"><li>State Capitol</li><li>Chancellor's House</li><li>Jimmy Smith Park</li></ul>	<i>Property, Parking Lots and Land are typically both a "Property" and an "Asset" in AiM</i>
Property Component		<ul style="list-style-type: none"><li>Elevator</li><li>Shell</li><li>Hardscape</li></ul>	
System		<ul style="list-style-type: none"><li>HVAC System</li><li>Plumbing System</li></ul>	
Subsystem		<ul style="list-style-type: none"><li>Cooling Subsystem</li><li>Steam Subsystem</li><li>Chilled Water Subsystem</li></ul>	
Vehicle		<ul style="list-style-type: none"><li>Sedans</li><li>Mowers</li></ul>	
Durable		<ul style="list-style-type: none"><li>Desks</li><li>Chairs</li></ul>	
Meters		<ul style="list-style-type: none"><li>Master Meters</li><li>Virtual Meters</li></ul>	<i>Used with Energy Management Module</i>



# Thank You!

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