



Syncing up with Asset Management

Presented By: Ward Christian



Ward Christian

Senior Technical Support Analyst

- AiM administrator for The University of Alabama - 2008 to 2016
 - Implementation
 - Maintained and trained 400+ AiM users
 - Custom BIRT report design
- AssetWorks Customer Care – 2016 to 2017
 - Senior Technical Support Analyst 2018 to present
- Solutions Engineering – Feb. 2019 to present



Ward Christian

Senior Technical Support Analyst

- AiM administrator for The University of Alabama - 2008 to 2016
 - Implementation
 - Maintained and trained 400+ AiM users
 - Custom BIRT report design
- AssetWorks Customer Care – 2016 to 2017
 - Senior Technical Support Analyst 2018 to present
- Solutions Engineering – Feb. 2019 to present



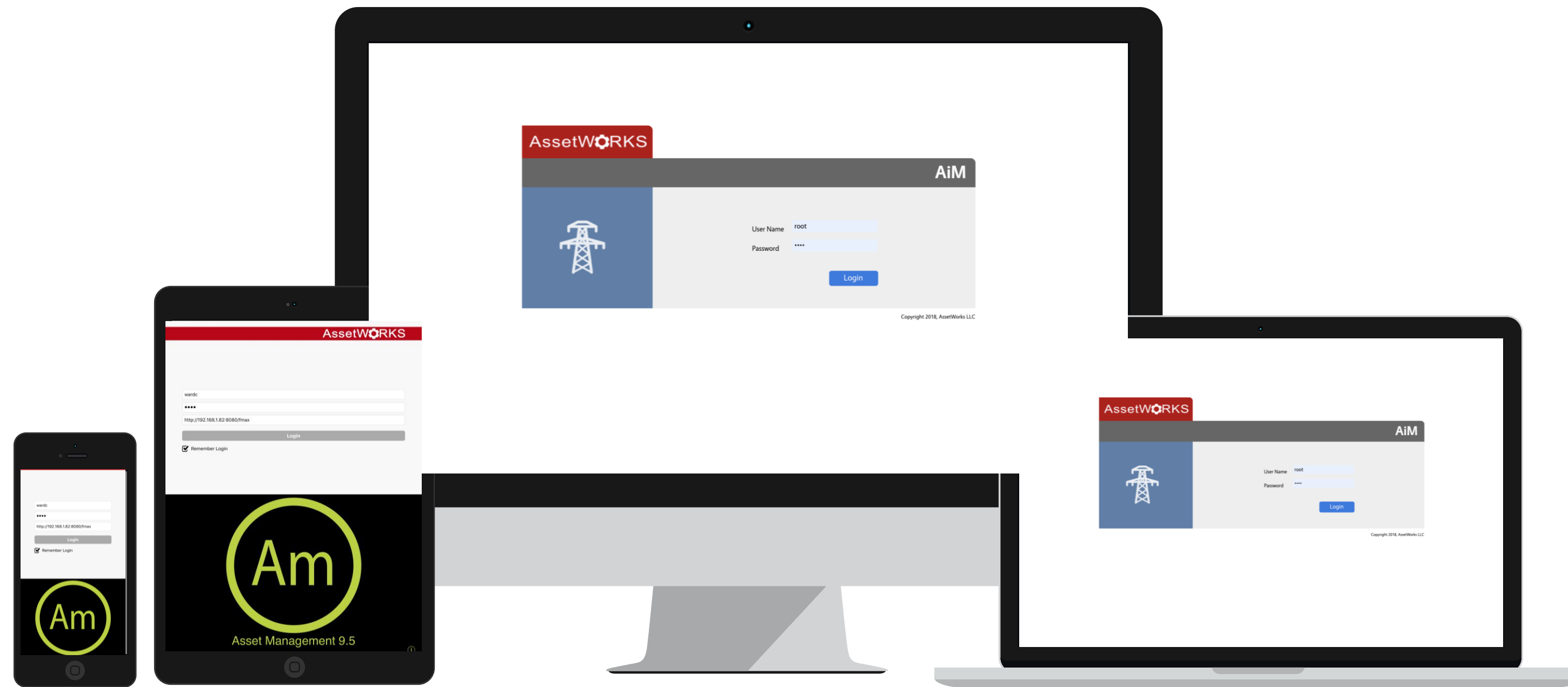
Syncing Up With Asset Management

Asset Sync and Go Asset Management: How to get the most out of your applications.

- Understanding basic functions of AssetSync and Go Asset Management.
- Bulk uploading data through AssetSync.
- The ability to understand and manipulate asset data within Excel.
- Finding and fixing import errors in AssetSync review.
- Navigating through Go Asset Management for asset updates.

Accessibility across multiple devices

Desktop and iOS device capable



Desktop Application

Using AiM in the back office or even across iOS devices.



iOS Accessibility

iOS devices have the ability to use both the Go Suite of Apps, as well as access the full AiM application.



Streamlining Processes

The ability to have your shop associates and field technicians working seamlessly across platforms.

Asset Management: The Challenges

Entering New Assets

New assets come online each day. How are you bulk loading your assets delivered from construction contractors? What about the 'one off' assets coming online each day?



Exporting Assets

What is your current process for exporting listings of your assets? SQL queries? BIRT/IQ reports? What else can you achieve through an easy export process?



Updating Your Assets

How do you handle updating current asset information? For one asset, an update may be rather easy. But what if you need to update the Asset Group for a range of assets?





AiM

Enterprise IWMS

Our Solution

Out-of-the-Box Functionality

A set of purpose built out-of-the-box screens inside of AiM that allow exporting, importing and reviewing of asset data



Microsoft Excel

Standard Microsoft Excel spreadsheet format for both importing and exporting, a tool you already know how to use.



Validation

All standard AiM validation of business logic is applied when posting updates, so there is no worry about invalid data being applied to AiM. Your Asset Tsar can always have final approval on updates.



System Setup

DON'T FORGET!!!

Property

Purchasing

Space Management

Time and Attendance

Utility Management

System Administration

Security Log

Sent Email

Survey Definition

Survey Type

System Setup

Transaction Numbers

User Defined Fields Manager

Weather

176	ASSETSYNC - DEFAULT SETTING FOR NUMBERING NEW ASSETS	AiM
177	USE ASSETSYNC FOR GO ASSET MANAGEMENT EDITS	Yes



Mobile Product Suite

Go Work Management



Go Inventory



Go Asset Management



Go Purchasing



Go Receiving



Go CPPM



AssetSync and Go Asset Management

Working hand in hand



AssetSync



Asset
Management



Asset Basics



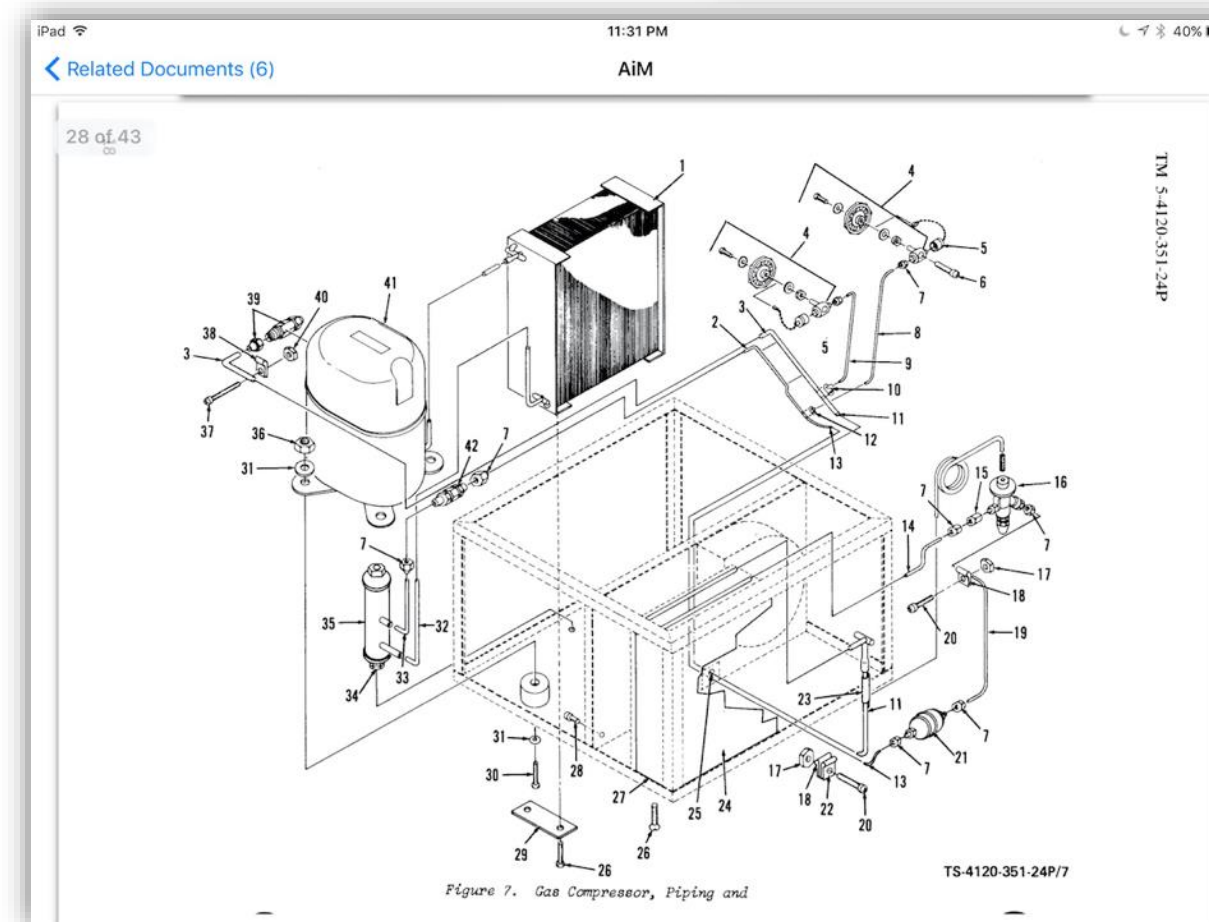
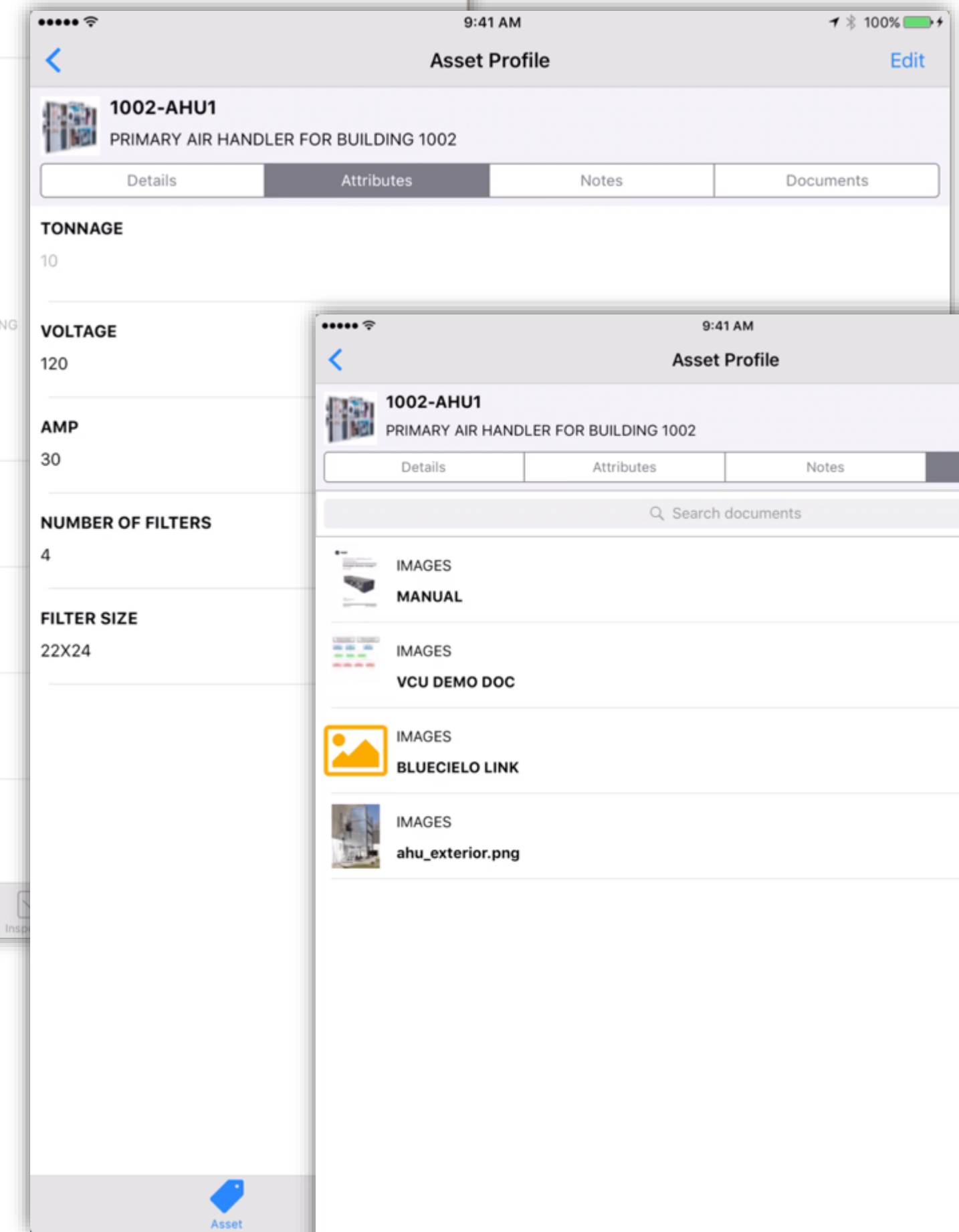
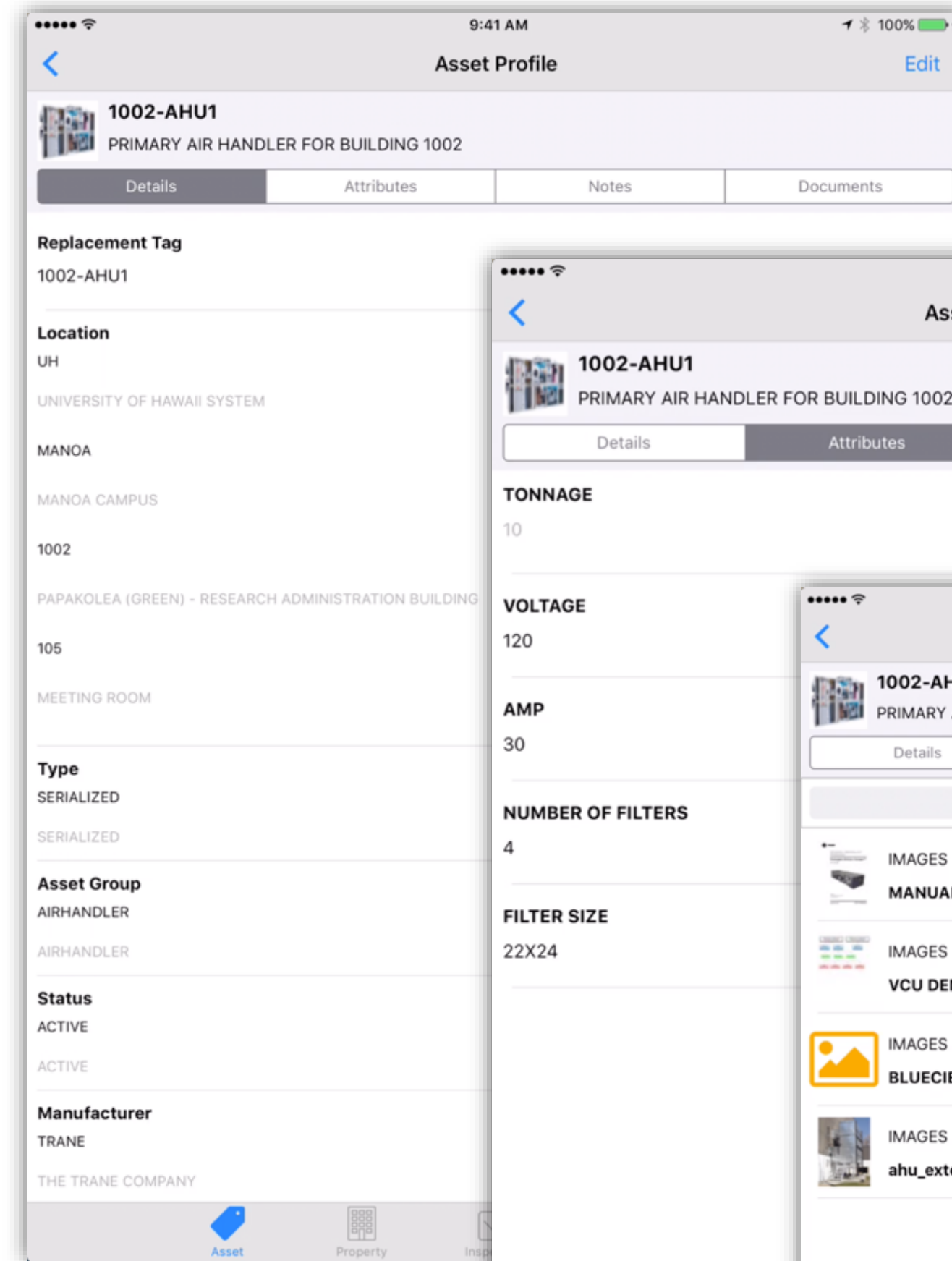
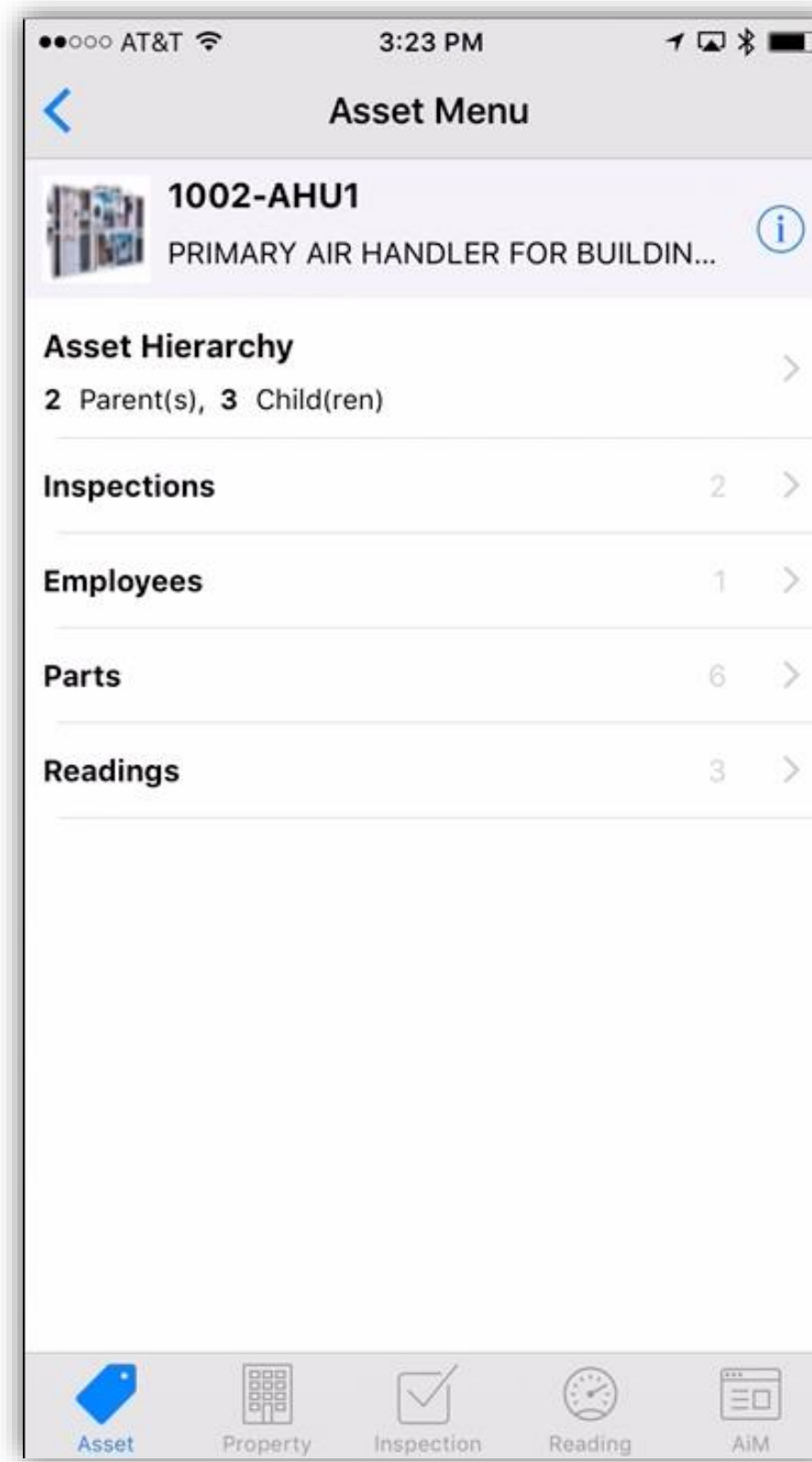
Editable



Missing asset basics



Configurable by asset group





AssetSync

Introducing AssetSync

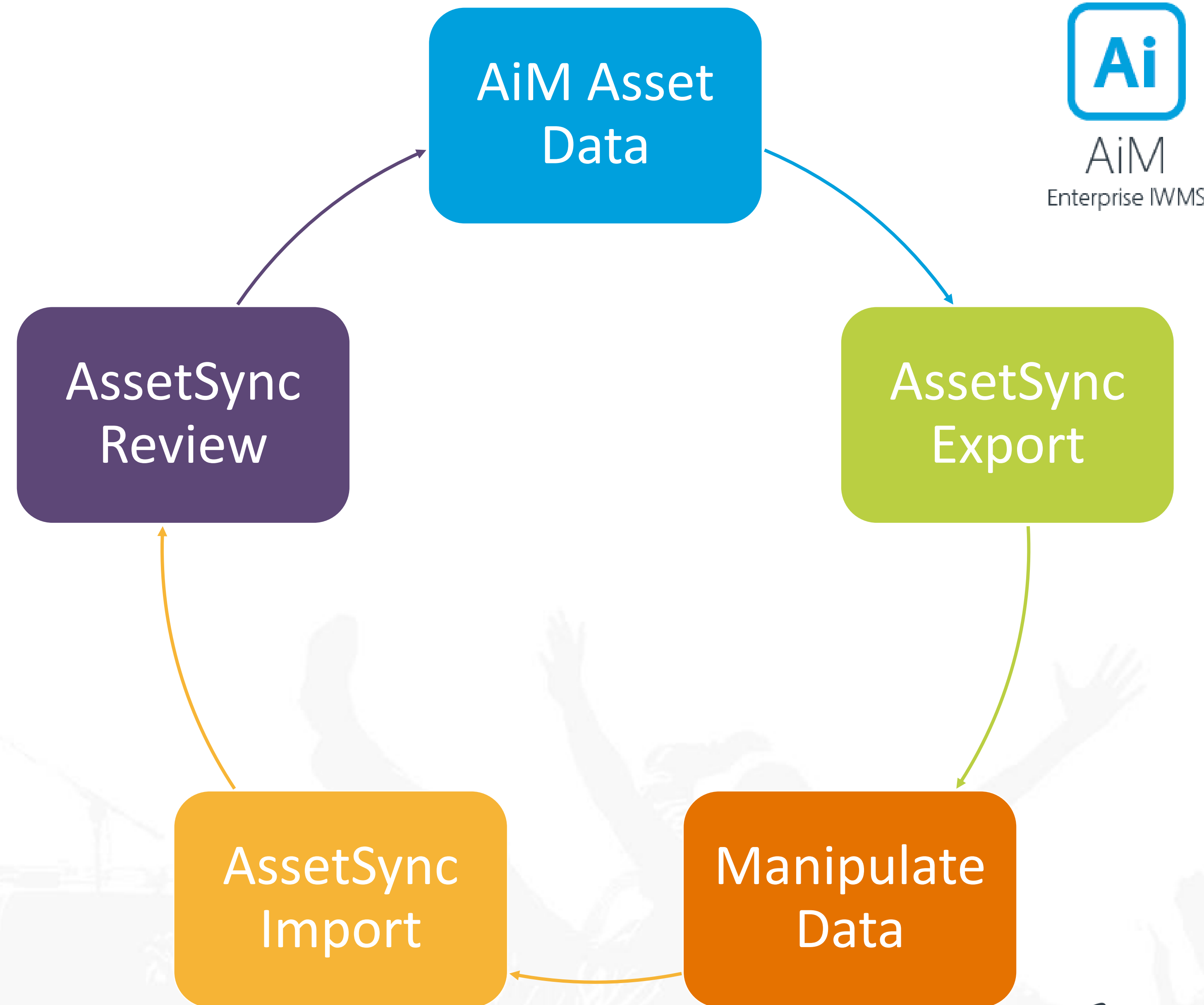
- Master Asset Profile
- PM Assets
- Capital Project Assets

- Search/Query Assets
- Export to MS Excel
- Export Template

- Other System
- Manually in MS Excel

- Import MS Excel
- Error Logging

- Review and Process Updates
- Update Existing Assets
- Create New Assets



AiM
Enterprise IWMS

AssetSync - Export



AiM

Enterprise IWMS

Request

Inbox (124) - ready.user@mail - x

WorkDesk

mac.localhost.com:8080/fmax/screen/WORKDESK?module=AIMPORT

AiM

AiMport

Add

Restore

IQ

Menu

Region Review

Facility Review

Property Review

Location Review

Institution Review

Department Review

Manufacturer Review

Asset Review

Cost Model Import

Cost Model Review

Assessment Deficiency Export

Assessment Deficiency Import

Assessment Deficiency Review

Asset Renewal Export

Asset Renewal Import

Asset Renewal Review

AiMCAD Floor Review

AssetSync Export

AssetSync Import

AssetSync Review

COBie Review

Space Survey Import

Setup

AiMCAD Legend

AiMCAD Standard Report Definition

AiMCAD Thematic Fill

COBie Import

©2018 AssetWorks

AiM

AssetSync Export

Back

Execute

Advanced Search

Action

New Query

Edit Query

View

Demo Export

Display Order

Sort

Operator

☐

Asset

-

=

☐

Description

-

contains

☐

Asset Type

-

=

☐

Asset Group

-

=

23-75 10 24 21 27

☐

Meter Type

-

=

☐

Commercial Meter

-

=

☐

Status

-

=

☐

Region

-

=

☐

Facility

-

=

☐

Property

-

=

☐

Location

-

=

☐

Warehouse

-

=

☐

Bin

-

=

☐

Planning Group

-

=

☐

Priority

-

=

☐

Install Year

-

=

☐

Physical Life (Years)

-

=

AiM

AssetSync Export

Search

Action

Export to Excel

Export HayStack

Export File Format

View

Demo Export

Asset	Description	Asset Type
17051	AC Unit Type 1 AC-1 AC UNIT	BIM
17052	AC Unit Type 1 AC-2 AC UNIT	BIM
17053	AC Unit Type 1 AC-3 AC UNIT	BIM
17054	AC Unit Type 1 AC-4 AC UNIT	BIM
17055	AC Unit Type 2 AC-5 AC UNIT	BIM
21008	AC Unit Type 1 AC-1 AC UNIT	BIM
21009	AC Unit Type 1 AC-2 AC UNIT	BIM
21010	AC Unit Type 1 AC-3 AC UNIT	BIM
21011	AC Unit Type 1 AC-4 AC UNIT	BIM
21012	AC Unit Type 2 AC-5 AC UNIT	BIM
32017	AC Unit Type 2 AC-5 AC UNIT	BIM

export (2)

asset_tag	new_aim_asset	description	asset_type	asset_group	status_code	rentable_yn	tag_number	region_code	fac_id	bldg	location_code	loc_id
17051	N	AC Unit Type 1 AC-1 AC UNIT	BIM	23-75 10 24 21 27	ACTIVE	N	17051	TEST	TEST	TEST-013	1B21	41
17052	N	AC Unit Type 1 AC-2 AC UNIT	BIM	23-75 10 24 21 27	ACTIVE	N	17052	TEST	TEST	TEST-013	1C13	60
17053	N	AC Unit Type 1 AC-3 AC UNIT	BIM	23-75 10 24 21 27	ACTIVE	N	17053	TEST	TEST	TEST-013	2B12	187
17054	N	AC Unit Type 1 AC-4 AC UNIT	BIM	23-75 10 24 21 27	ACTIVE	N	17054	TEST	TEST	TEST-013	2C15	222
17055	N	AC Unit Type 2 AC-5 AC UNIT	BIM	23-75 10 24 21 27	ACTIVE	N	17055	TEST	TEST	TEST-013	1B01	23
21008	N	AC Unit Type 1 AC-1 AC UNIT	BIM	23-75 10 24 21 27	ACTIVE	N	21008	UCONN	STORRS	COBIE	1B21	41
21009	N	AC Unit Type 1 AC-2 AC UNIT	BIM	23-75 10 24 21 27	ACTIVE	N	21009	UCONN	STORRS	COBIE	1C13	60
21010	N	AC Unit Type 1 AC-3 AC UNIT	BIM	23-75 10 24 21 27	ACTIVE	N	21010	UCONN	STORRS	COBIE	2B12	187
21011	N	AC Unit Type 1 AC-4 AC UNIT	BIM	23-75 10 24 21 27	ACTIVE	N	21011	UCONN	STORRS	COBIE	2C15	222
21012	N	AC Unit Type 2 AC-5 AC UNIT	BIM	23-75 10 24 21 27	ACTIVE	N	21012	UCONN	STORRS	COBIE	2D04	239
32017	N	AC Unit Type 2 AC-5 AC UNIT	BIM	23-75 10 24 21 27	PENDING	N	21012	UCONN	STORRS	COBIE	2D04	239



AssetSync - Import

AiM

AssetSync Import

ClarkAboutHelpLogout

Save

Cancel

1004

Last Edited by SYSTEM On 04/23/2018 08:49 AM

Status

Load file

Choose File

No file chosen

Load HayStack

Pull Data

New Asset Tags are numbered from

AiM

©2018 AssetWorks

AiM

AssetSync Import

ClarkAboutHelpLogout

New

Search

Browse

Action

Error Log

1004

Last Edited by Clark Kent On 04/23/2018 08:50 AM

Status

Errors

New Asset Tags are numbered from

AiM

Assets

Asset	Description	Review Status	Status	Region	Facility	Property	Location	Asset Type	Asset Group
17051	AC Unit Type 1 AC-1 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	1B21	BIM	23-75 10 24 21 27
17052	AC Unit Type 1 AC-2 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	1C13	BIM	23-75 10 24 21 27
17053	AC Unit Type 1 AC-3 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	2B12	BIM	23-75 10 24 21 27
17054	AC Unit Type 1 AC-4 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	2C15	BIM	23-75 10 24 21 27
17055	AC Unit Type 2 AC-5 AC UNIT	Manual Rework	ACTIVE	TEST	TEST	TEST-013	ABC123	BIM	23-75 10 24 21 27
21008	AC Unit Type 1 AC-1 AC UNIT	Verified	ACTIVE	UCONN	STORRS	COBIE	1B21	BIM	23-75 10 24 21 27
21009	AC Unit Type 1 AC-2 AC UNIT	Verified	ACTIVE	UCONN	STORRS	COBIE	1C13	BIM	23-75 10 24 21 27
21010	AC Unit Type 1 AC-3 AC UNIT	Verified	ACTIVE	UCONN	STORRS	COBIE	2B12	BIM	23-75 10 24 21 27
21011	AC Unit Type 1 AC-4 AC UNIT	Verified	ACTIVE	UCONN	STORRS	COBIE	2C15	BIM	23-75 10 24 21 27
21012	AC Unit Type 2 AC-5 AC UNIT	Verified	ACTIVE	UCONN	STORRS	COBIE	2D04	BIM	23-75 10 24 21 27
ABC123	AC Unit Type 2 AC-5 AC UNIT	New	PENDING	UCONN	STORRS	COBIE	2D04	BIM	23-75 10 24 21 27

AiM

AssetSync Import

ClarkAboutLogout

Done

Edit Date	Editor	Sequence ↓	Reason	File Tab	File Row ↓
Apr 23, 2018 08:50 AM	ROOT	1	LOCATION_CODE CONTAINS AN INVALID VALUE (ABC123)	ASSETS	5
Apr 23, 2018 08:50 AM	ROOT	2	FIELD [LOCATION] CONTAINS AN INVALID VALUE [ABC123] ON RECORD [TRANSACTION [32380] ASSET [17055]]		5
Apr 23, 2018 08:50 AM	ROOT	3	FIELD [LOCATION] CONTAINS AN INVALID VALUE [ABC123] ON RECORD [ASSET [17055]]	ASSETS	5
Apr 23, 2018 08:50 AM	ROOT	4	FIELD [LOCATION ID] CONTAINS AN INVALID VALUE [NULL] ON RECORD [TRANSACTION [32380] ASSET [17055]]		5



AssetSync - Review



AiM

AssetSync Review

Clark About Help Logout

Approve

Reject

Search

Batch	Asset	Description	Review Status	Status	Region	Facility	Property	Asset Type	Asset Group	Edit Date	Editor
1004	17051	AC Unit Type 1 AC-1 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	BIM	23-75 10 24 21 27	Apr 23, 2018 08:50 AM	ROOT
1004	17052	AC Unit Type 1 AC-2 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	BIM	23-75 10 24 21 27	Apr 23, 2018 08:50 AM	ROOT
1004	17053	AC Unit Type 1 AC-3 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	BIM	23-75 10 24 21 27	Apr 23, 2018 08:50 AM	ROOT
1004	17054	AC Unit Type 1 AC-4 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	BIM	23-75 10 24 21 27	Apr 23, 2018 08:50 AM	ROOT
1004	17055	AC Unit Type 2 AC-5 AC UNIT	Manual Rework	ACTIVE	TEST	TEST	TEST-013	BIM	23-75 10 24 21 27	Apr 23, 2018 08:50 AM	ROOT
1004	21008	AC Unit Type 1 AC-1 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	BIM	23-75 10 24 21 27	Apr 23, 2018 08:50 AM	ROOT
1004	21009	AC Unit Type 1 AC-2 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	BIM	23-75 10 24 21 27	Apr 23, 2018 08:50 AM	ROOT
1004	21010	AC Unit Type 1 AC-3 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	BIM	23-75 10 24 21 27	Apr 23, 2018 08:50 AM	ROOT
1004	21011	AC Unit Type 1 AC-4 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	BIM	23-75 10 24 21 27	Apr 23, 2018 08:50 AM	ROOT
1004	21012	AC Unit Type 2 AC-5 AC UNIT	Verified	ACTIVE	TEST	TEST	TEST-013	BIM	23-75 10 24 21 27	Apr 23, 2018 08:50 AM	ROOT
1004	ABC123	AC Unit Type 2 AC-5 AC UNIT	New	PENDING	TEST	TEST	TEST-013	BIM	23-75 10 24 21 27	Apr 23, 2018 08:50 AM	ROOT

Page 1 of 1 Go Display: 25 First

AiM

AssetSync Review

Clark About Logout

Save

Cancel

View

Attributes

Children

Locations Served

Accounts

Offset Accounts

PM Templates

Capital Projects

Reactor Event Handler

User Defined Fields

17055

Last Edited by Clark Kent On 04/23/2018 08:50 AM

AC Unit Type 2 AC-5 AC UNIT

Status

ACTIVE

Asset Type

BIM

BIM ASSET

Asset Group

23-75 10 24 21 27

UNITARY AIR CONDITIONING EQUIPMENT

Rentable

No

Replacement Tag

17055

PM Route

Route Sequence

Lockout/Tagout

No

Extra Description

Region

TEST

TEST REGION

Facility

TEST

Status

ACTIVE

Asset Type

BIM

BIM ASSET

Asset Group

23-75 10 24 21 27

UNITARY AIR CONDITIONING EQUIPMENT

Rentable

No

Replacement Tag

17055

PM Route

Route Sequence

Lockout/Tagout

No

Extra Description

Region

TEST

TEST REGION

Facility

TEST

Review Status

Manual Rework

Batch Number

1004

©2018 AssetWorks





Live Demonstration



Thank You!

Ward Christian

ward.christian@assetworks.com

1.800.268.0325

