



Assets: Create, Clone, Generate

This training session focuses on your facility's assets. Assets are the spaces, equipment, or vehicles you maintain. When work orders are created in MicroMain Maintenance, assets are the items on which maintenance is performed.

Every asset is located on/in a Property. Property location is required to create and maintain an asset. Additionally, an asset can be located in a building on that property, on a particular floor of that building, in a particular wing or in a particular zone.

MicroMain Maintenance identifies three types of assets:

1. *Area Assets*: These are fixed assets like rooms, offices, common areas, closets, lawns, garages, walls, roofs, etc.
2. *Equipment Assets*: These are movable assets like appliances, furniture, computers, presses, building systems, etc. that can be located in area assets.
3. *Vehicle Assets*: These are moveable assets like cars, trucks, forklifts, boats, airplanes, etc. that can be located in area assets. (Vehicle assets will not be covered in this session.)

The asset type is stored on the Asset form. In addition, the form stores an asset's identity (name), location, and other details. MicroMain Maintenance is used to update and track the identity, location, and maintenance history of your assets.

The following topics are discussed in this tutorial:

- Creating Asset Records from the Asset Form
- Cloning Assets
- Generating Assets

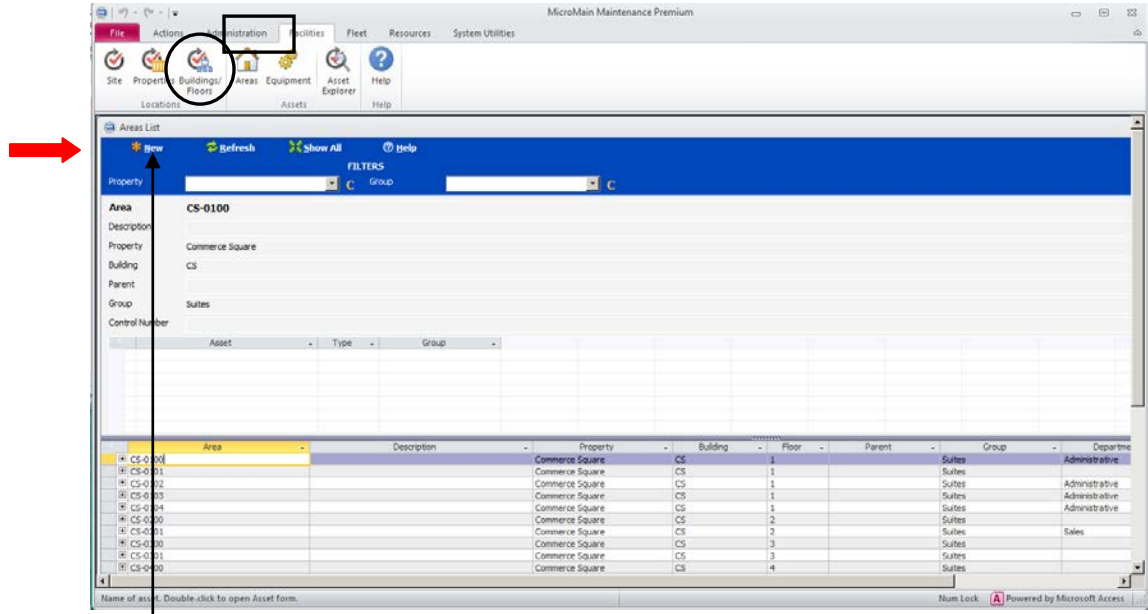
Appendix:

- Asset Details
- Asset Groups/Subgroups

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Creating Asset Records from the Asset Form

1. On the MM Facilities tab: click on **Areas** (area assets) or Equipment (equipment assets).

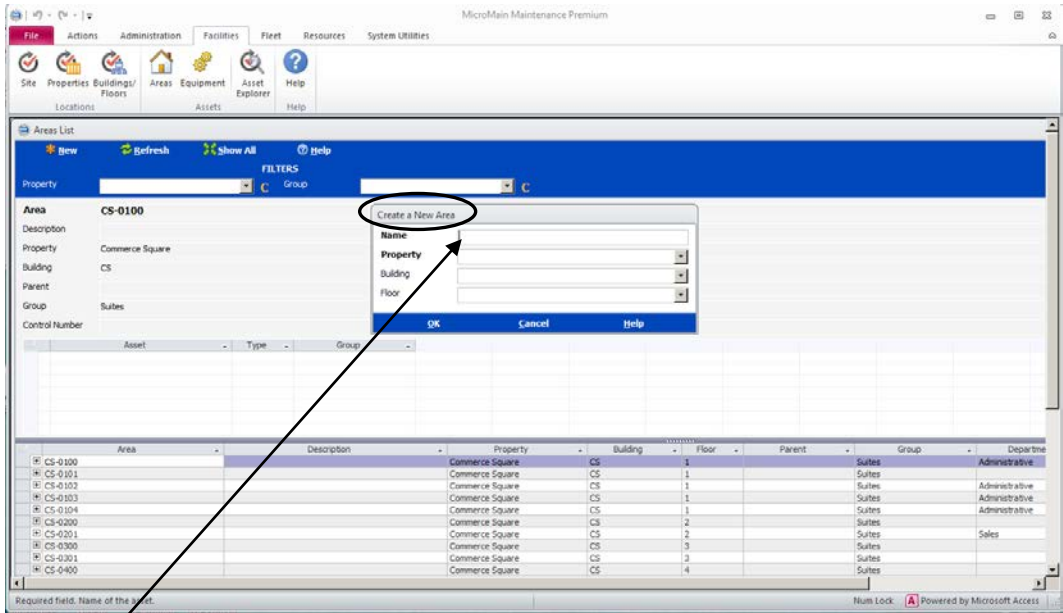


The area assets in the MM database will be displayed.

2. Click: **New** to add/create an area Asset.

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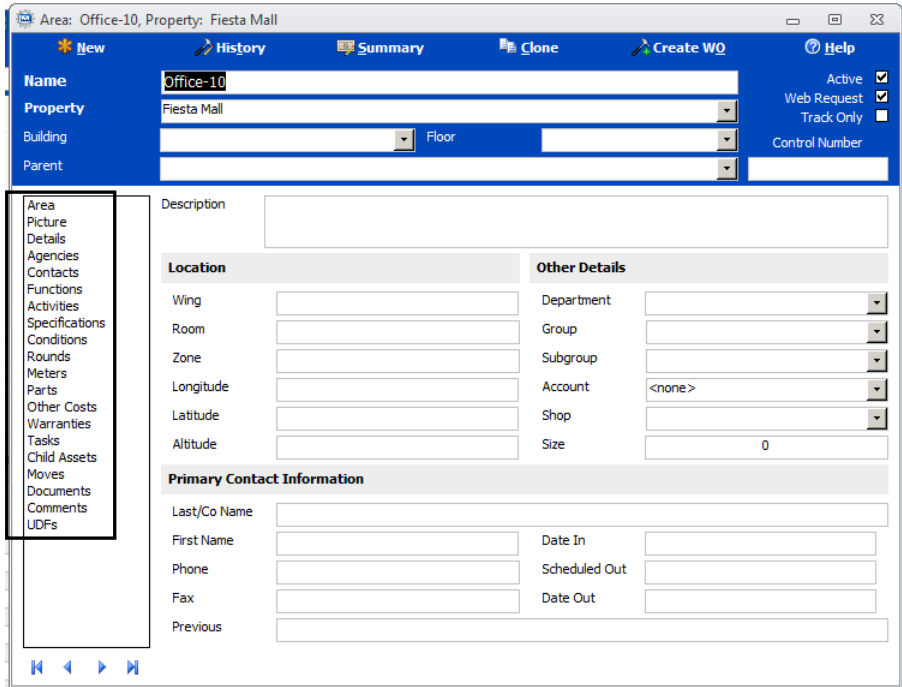
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3. Enter:
 - Name:** (name or description of the area asset).
 - Property:** property location of the asset (select the property name from the dropdown list). Only existing properties are available for selection.
 - Building:** building location of the area asset (select the building name from the dropdown list).
 - Floor:** floor location of the area asset (select the floor from the dropdown list)
4. Click: **OK**.



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The new asset record will be displayed.

5. Enter additional information as it pertains to the asset.

Asset Form:

Parent: Name of the parent asset to which this asset is assigned.

Control Number: Control number of the asset; used to open as asset record with a scanning device.

Location: Wing, Room, Zone, Longitude, Latitude, Altitude (supplemental asset location information).

Other Details:

Area Asset: Department, Group, Subgroup, Account, Shop (labor shop), Size (size of an area asset).

Equipment Asset: Manufacturer, Model Number, Serial Number, Group, Subgroup, Account, Shop.

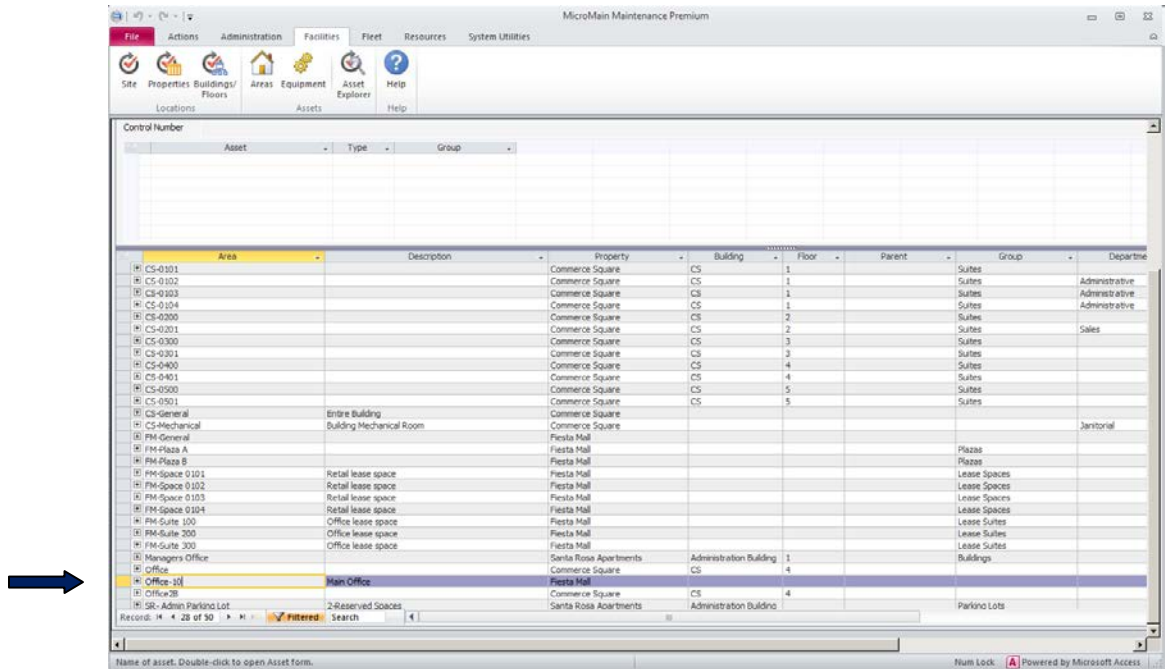
Primary Contact Information: (primary contact for the asset) Name, Phone, Previous (contact), Date In (area asset created), Scheduled Out (area asset estimated deletion date), Date Out (area asset actual date asset record deleted).



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Additional Forms: Picture, Details, Agencies, Contacts, Functions, Activities, Specifications, Conditions, Rounds, Meters, Parts, Other Costs, Warranties, Tasks, Child Assets, Moves, Documents, Comments, UDFs. (See appendix for Asset Details.)

- Exit the asset record: click 'X' in the upper right hand corner of the asset form.



The asset is displayed on the Areas asset list.

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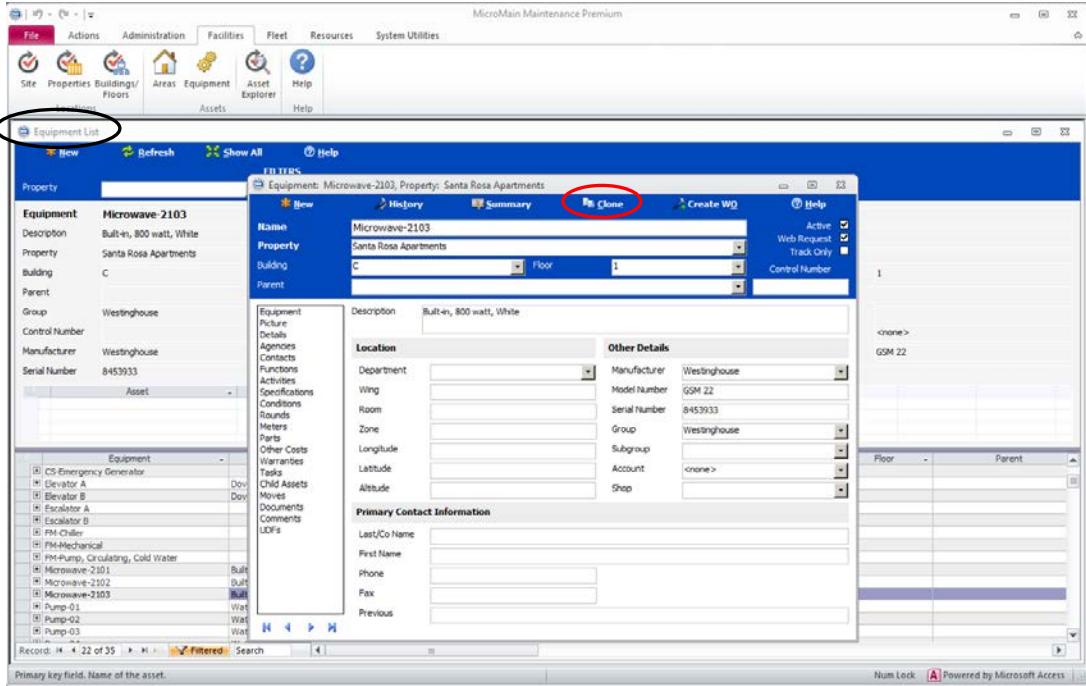
Cloning Asset Records

Cloning enables creation of a copy(s) of an asset. It allows duplication with minimal keystrokes. Assets cloned can be rooms/offices in a building, HVAC units, desks for offices, appliances for apartments.

When an asset is cloned, information specific to the original asset is not carried to the duplicate, e.g., serial number, control number, last maintained date, longitude/latitude/ altitude, assigned meter, assigned activities last done date, primary contact information, warranty details, assigned child assets, recorded location moves, other cost details.

Once an asset has been cloned it must be renamed. In addition, the location must be reviewed and updated.

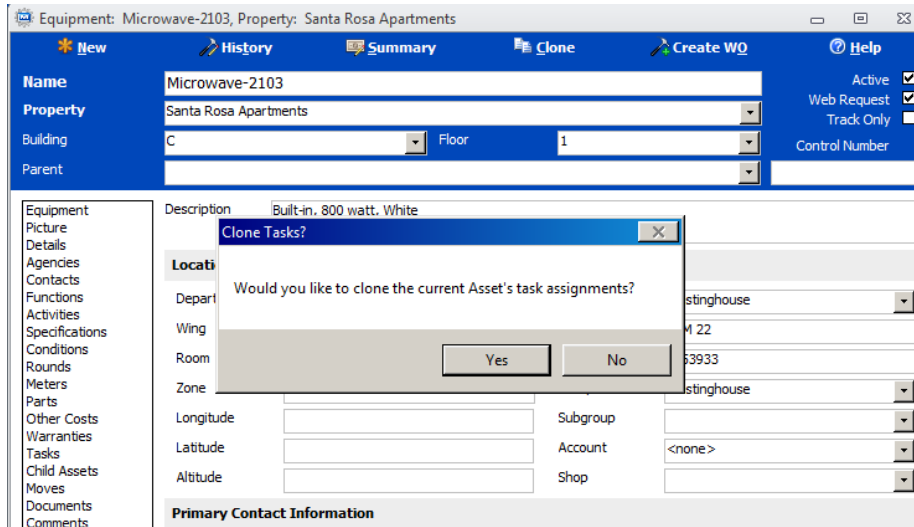
1. On the MM Facilities tab: click on **Equipment** Assets.
2. Open the asset record to be cloned: double-click on the asset name.



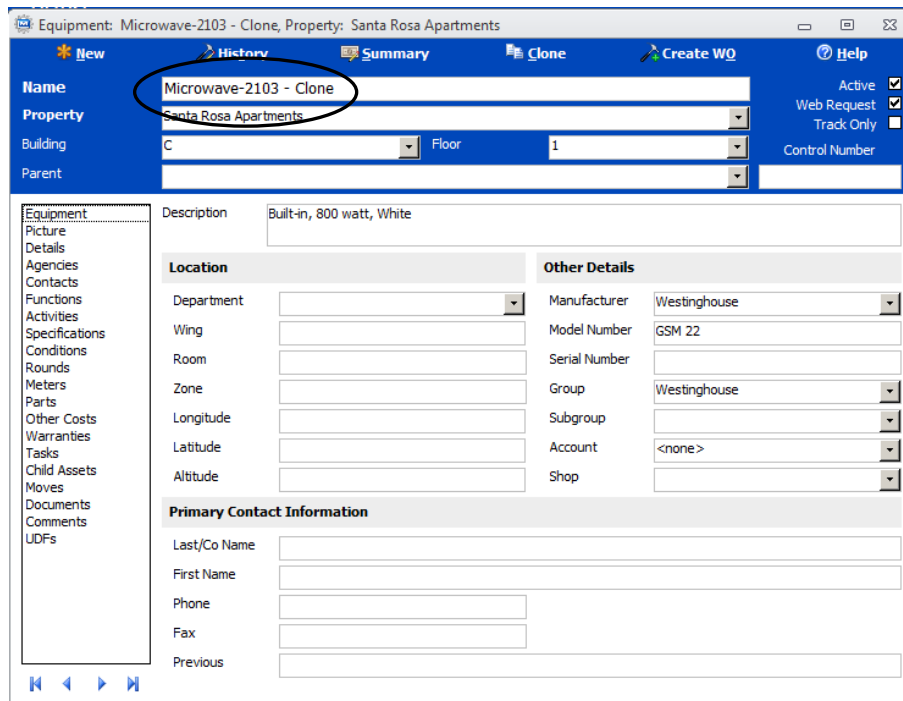
3. Click: **Clone** icon.



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- a. Would you like to clone the current Asset's Task Assignments?
 - i) Yes – check all the tasks cloned to verify the relevancy for the new asset (irrelevant tasks can be deleted)
 - ii) No – no assigned tasks will be cloned for the new asset



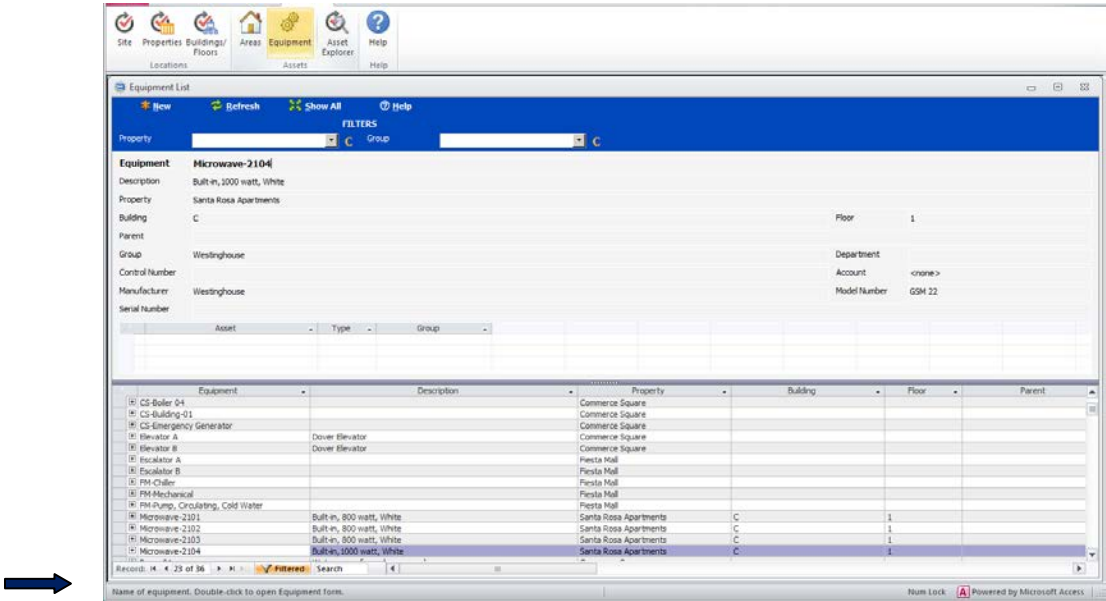
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The new asset has the same name as the cloned asset with 'Clone' added at the end of the name. Rename the asset, removing the 'Clone' designation and providing a unique name for the asset.

Review all information on the newly cloned asset and make all necessary updates/ additions for the asset, e.g., location, warranty, specifications, conditions, etc..

4. Close/exit the asset record by clicking the 'X' in the upper right corner of the form. (The new asset will be saved.)



The new asset is on the Equipment (asset) list.

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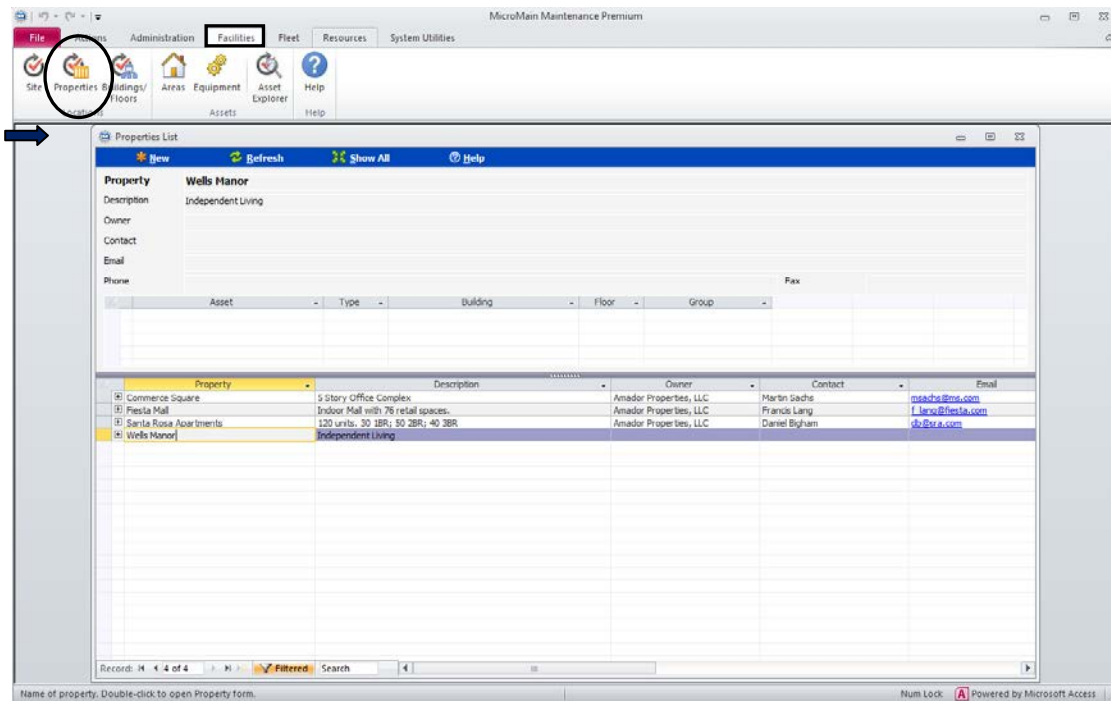
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Generating Assets

Generate New asset records allows you to create new assets (one or many) in the MM database using only a minimum amount of information. Use only the primary keys of the asset record.

1. On the MM Facilities tab: click on **Properties** icon.



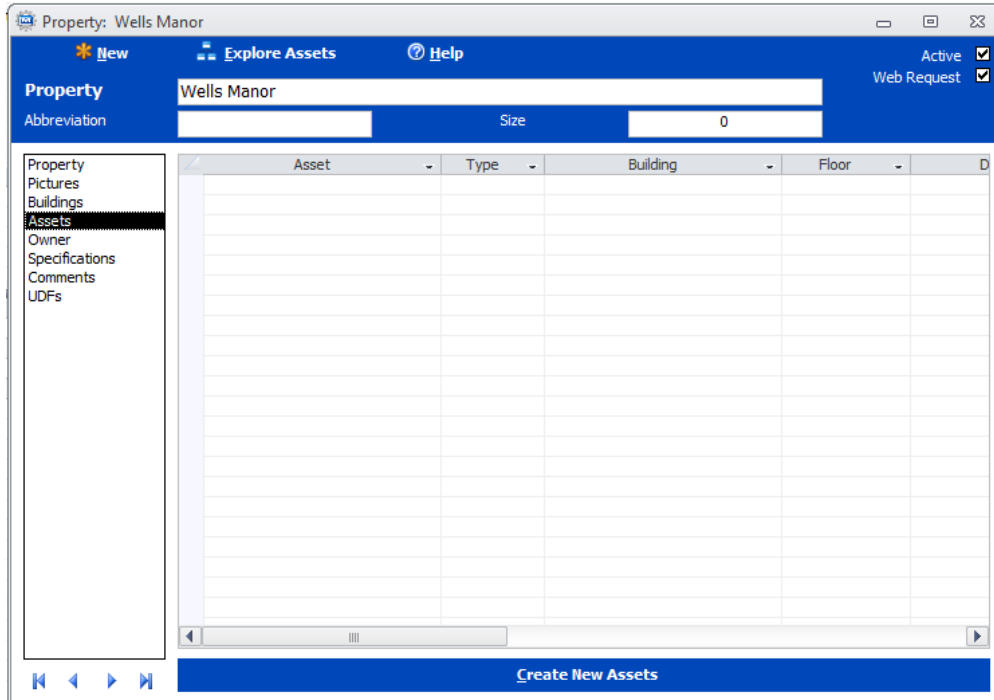
The Properties List will be displayed.

2. Open the Property record to generate assets for: double-click on the property name.
3. Click: Assets in the sidebar.

Contact Information

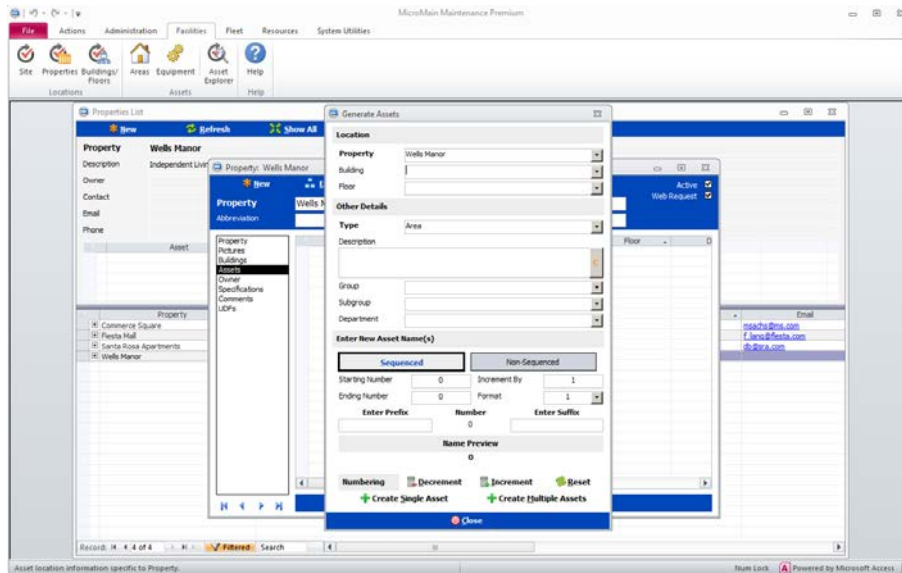
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The Assets List for the property will be displayed.

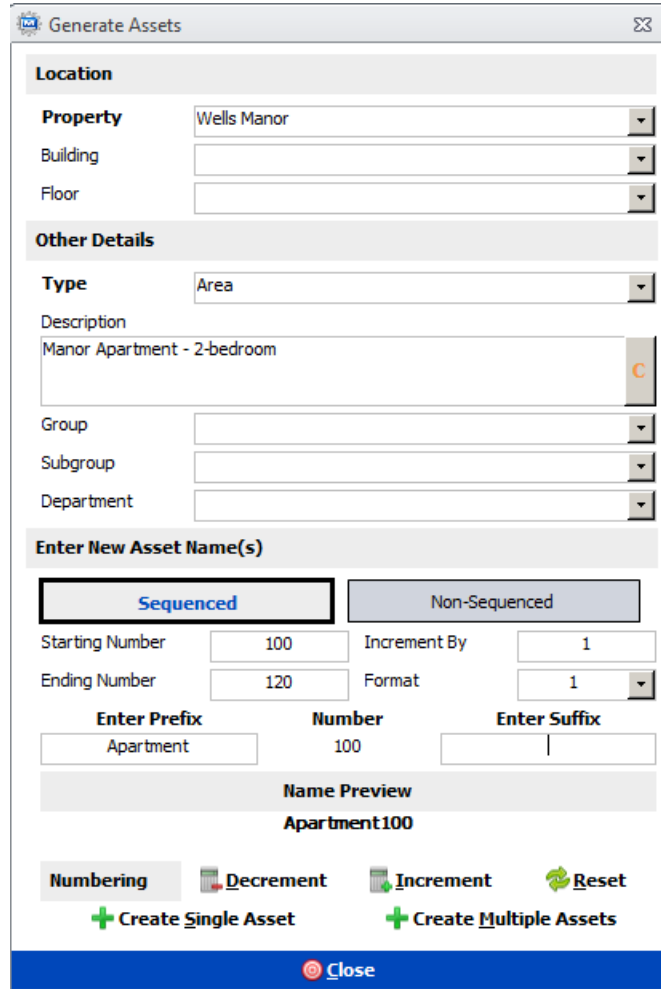
4. Click: **Create New Assets** in the bar at the bottom of the Property asset list.



The Generate Assets form is displayed.

Assets: Create, Clone, Generate

5. Enter the asset information:



Location:

Property: (populated with property opened above)

Building: select the building location for the asset(s) from the dropdown list

Floor: select the floor location for the asset(s) from the dropdown list

Other Details:

Type: select the asset type from the dropdown list (area, equipment, vehicle)

Description: enter a description of the asset

Group: select the asset group for the asset(s) from the dropdown list

Subgroup: select the asset subgroup for the asset(s) from the dropdown list

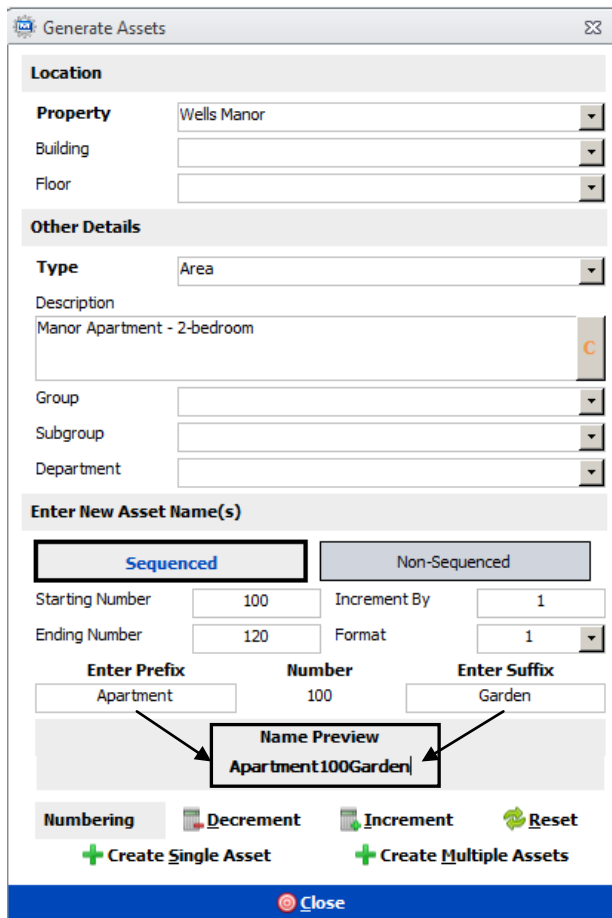


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Department: select the department responsible for the asset(s) from the dropdown list

Enter New Asset Name(s):

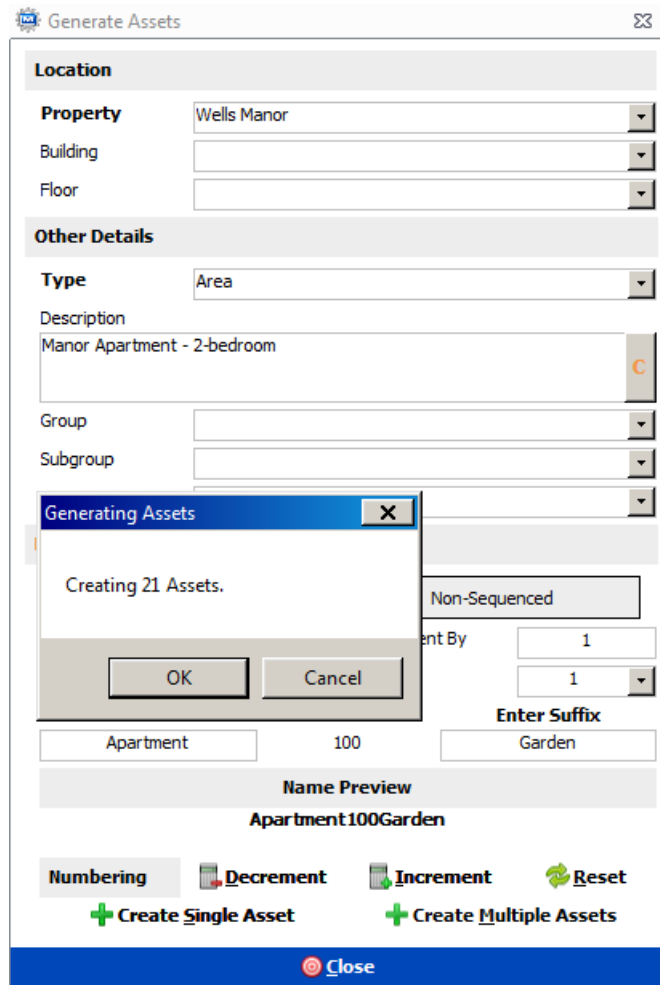
- a. Sequenced: click on *Sequenced* to generate/create multiple assets
- Starting Number: set the starting number of sequentially named assets
- Increment by: set the increment value of the sequence
- Ending Number: set the ending number of sequentially named assets
- Format: set the format of the numbers, e.g., 1, 01, 001.
- Enter Prefix: enter the text to appear before the numbers in the asset names
(Number: displays the first number in the sequence – protected)
- Enter Suffix: enter the text to appear after the numbers in the asset names
(Name Preview: displays the first name defined for the assets – protected)



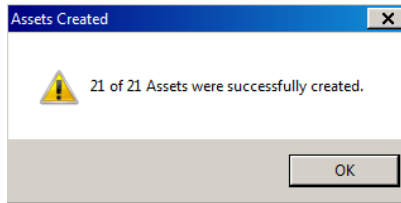
Click: **+Create Multiple Assets**

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Assets: Create, Clone, Generate



The starting number was set at 100 and the ending number at 120. The names will increment by 1, e.g., Apartment100Garden, Apartment101Garden, etc..



- b. Non-Sequenced: click on *Non-Sequenced* to generate/create one asset
Enter Name: enter the name of the new asset (name sequencing is not an option)

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Location

Property: Wells Manor
Building:
Floor:
Other Details

Type: Area
Description: Manor Apartment - 3-bedroom
Group:
Subgroup:
Department:
Enter New Asset Name(s)

Sequenced Non-Sequenced

Enter Name: LuxuryApartment121

+ Create Single Asset

Close

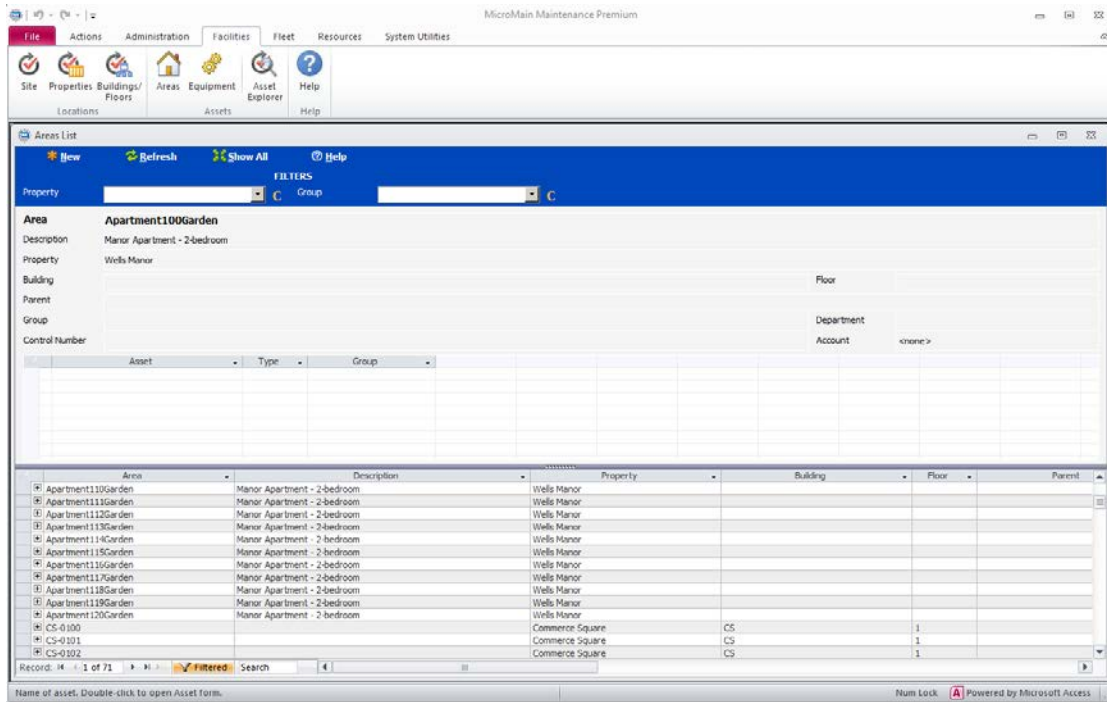
Click on: **+Create Single Asset**

6. Click: **Close** on the Generate Assets window.

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The new asset(s) will be displayed in the Property Asset list

Generate Assets from the Building form: Asset generation from the Building form is the same process.

From MM Facilities tab => Buildings/Floors => double-click Building => Assets (sidebar) => Create New => Generate Assets will display.

New Asset(s) will be created for the building location.

Generate Assets from the Asset form: Asset generation from the Asset form is similar process.

From MM Facilities tab => Area/Equipment Assets => double-click Asset on the asset list => double-click the Asset name (asset form) => Generate Assets will display.

New Asset(s) will be created for the property location of the asset opened.

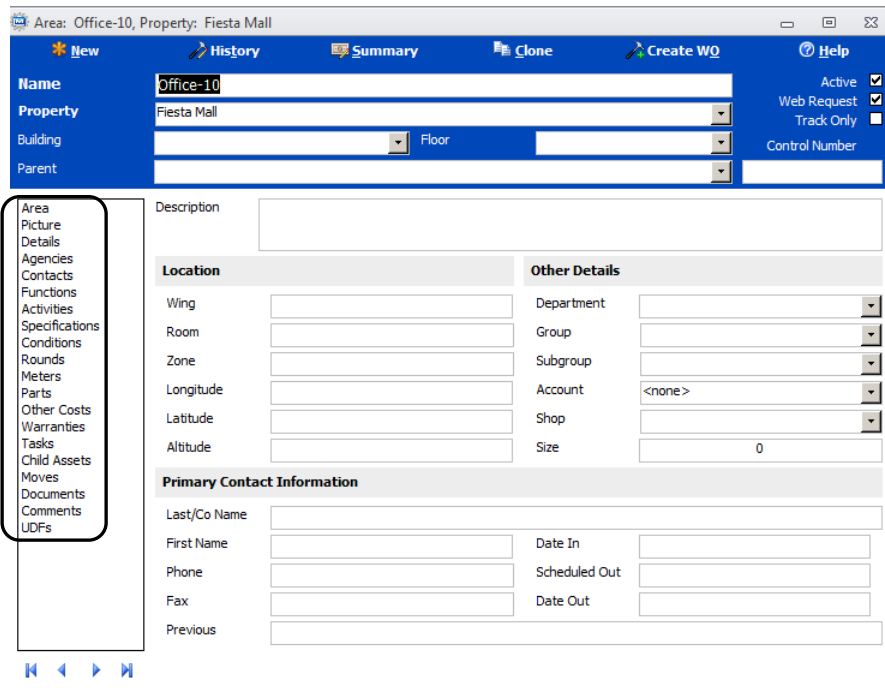


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Appendix

Additional Asset Details: Asset records can be created and maintained with minimal information, e.g., asset name and property location. MM allows you to identify your assets down to the minutest detail for accurate maintenance and accurate history of the asset. (Refer to the Help file for in-depth details and field definitions.)



Picture: Assign the asset picture to the record by referencing the location of the picture outside MM. (Store the picture in a central location accessible to all Maintenance users.)

Details: Stores miscellaneous details, e.g., purchase, depreciation, lease information for the asset.

Agencies: Lists the names of agencies that regulate the condition of the asset.

Contacts: Displays the names of individuals and companies that are directly responsible for the asset. Labor and non-labor contact records can be tracked.

Functions: Lists the asset's critical business functions.

Activities: Lists the deferred maintenance activities performed on an asset, e.g., check thermostat, lock door.

Specifications: Lists the asset's specifications that describe the asset, e.g., fuel/gauge settings, name plate information, dimensions.



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Conditions: Lists the aspects of the asset's current condition, e.g., temperature, vibration, lubrication.

Rounds: Lists and asset's checkpoints that are inspected during a routine round, e.g., doors (open/closed), lighting (on/off, burnt out bulbs), kitchen (counters clean, trash emptied).

Meters: Lists the asset's meters and their current readings.

Parts: Lists the component part information for the asset, e.g., light bulbs in a room, belts on equipment, filters on a vehicle.

Other Costs: Miscellaneous costs associated with the asset, e.g., license, insurance, permits rented cost. (temporary or recurring costs)

Warranties: Lists the asset's warranty. Warranty can be based on dates or meter reading or a combination of the two. When the asset requires work, the warranty indicator indicates whether the asset is under warranty or not.

Tasks: Lists the tasks assigned to the asset.

Child Assets: Lists all child assets assigned to this 'parent' asset. (See Training Documentation: Assets: Relationships.)

Moves: Displays a transaction log for the asset's location moves. When the location of an asset is changed, a move record is created. Moves included: change in property, building, floor, wing room and parent asset.

Documents: Lists required documents for the asset, parts for the asset, work orders, tasks, projects and contracts. The documents can be setup to print automatically on work orders.

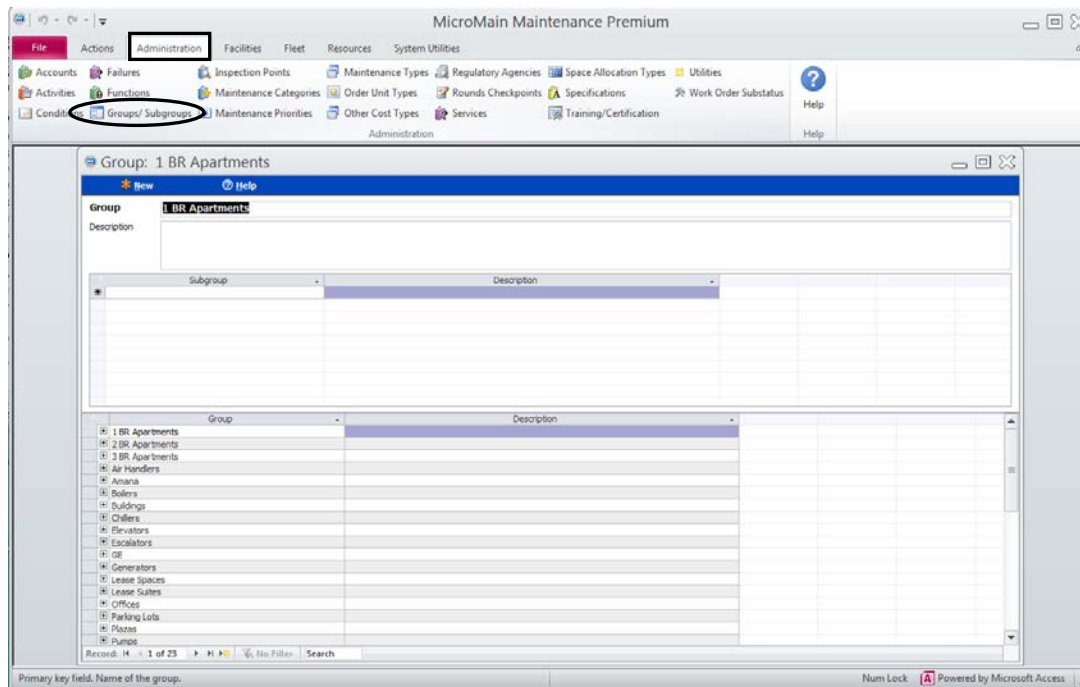
Comments: Comments are special instructions, log entries, descriptions, and other details about the asset. The comments can be added to a work order for the asset.

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Asset Groups and Subgroups: Asset groups are used for sorting assets. Assign similar assets to the same groups to sort them for reports and list selection, e.g., units, appliances, chillers.

Subgroups are used to sort asset groups. Subgroups allow you to sort within the group, e.g., appliances – refrigeration: refrigerators, freezers; lighting – floor lamps, desk lamps, ceiling lights.

Asset groups are setup in MM Maintenance => Administration

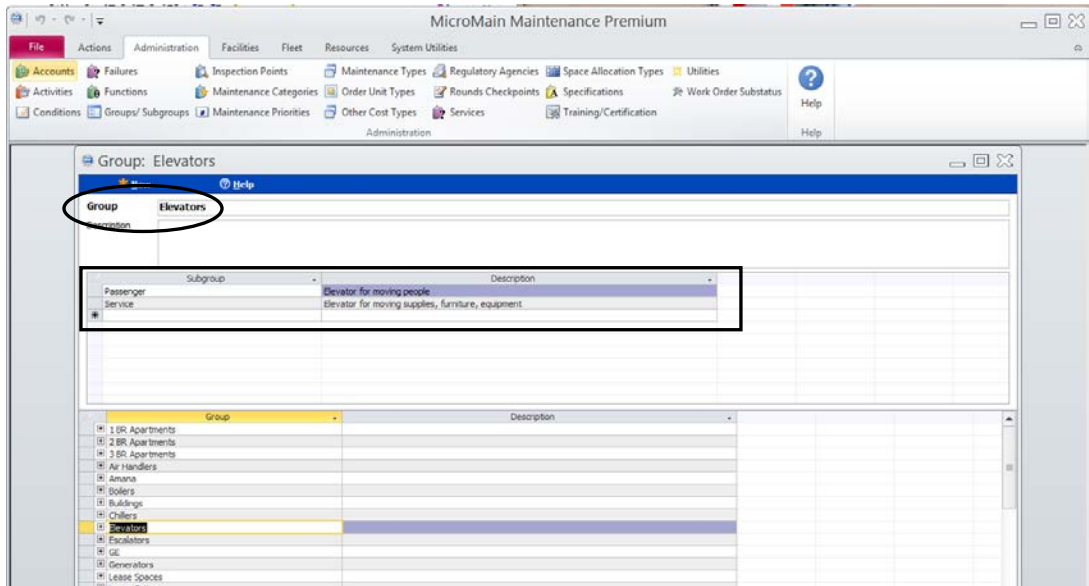


Click: **New** to create a new group. Enter the group name (required) and description.

Add appropriate subgroups to the list below the highlighted group.

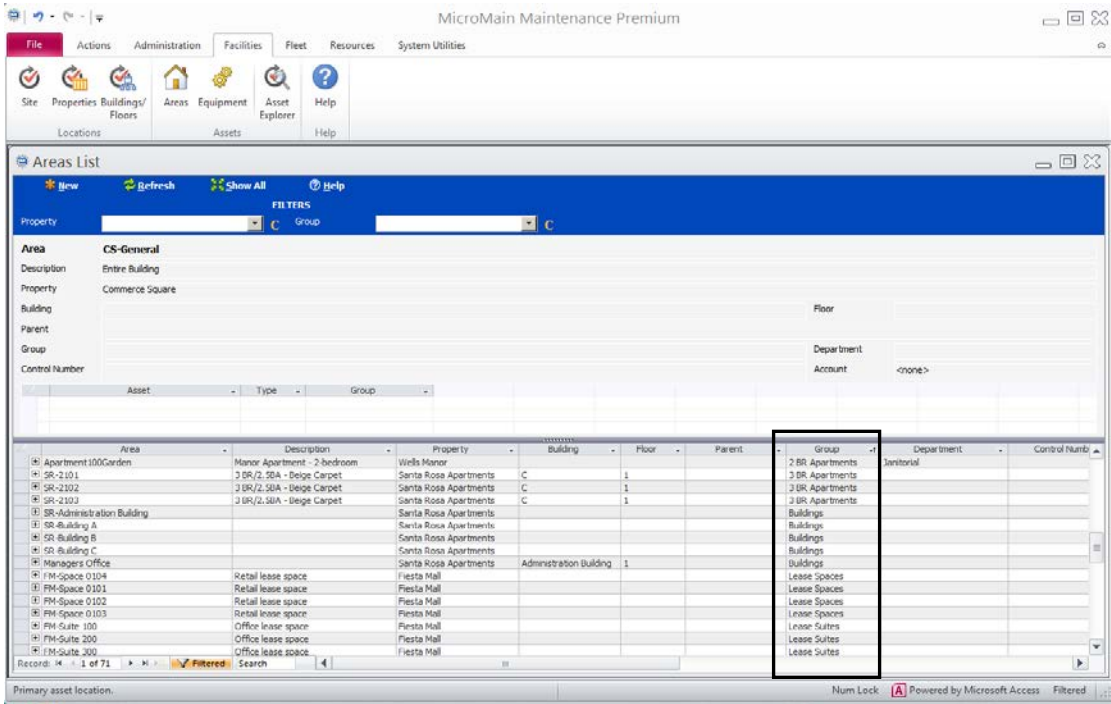
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Tab between fields. The subgroup(s) will be added. (Subgroups display below the group name.

Group and Subgroup are selected when the asset is created/added or updated. The Asset Group is displayed on the Asset List.

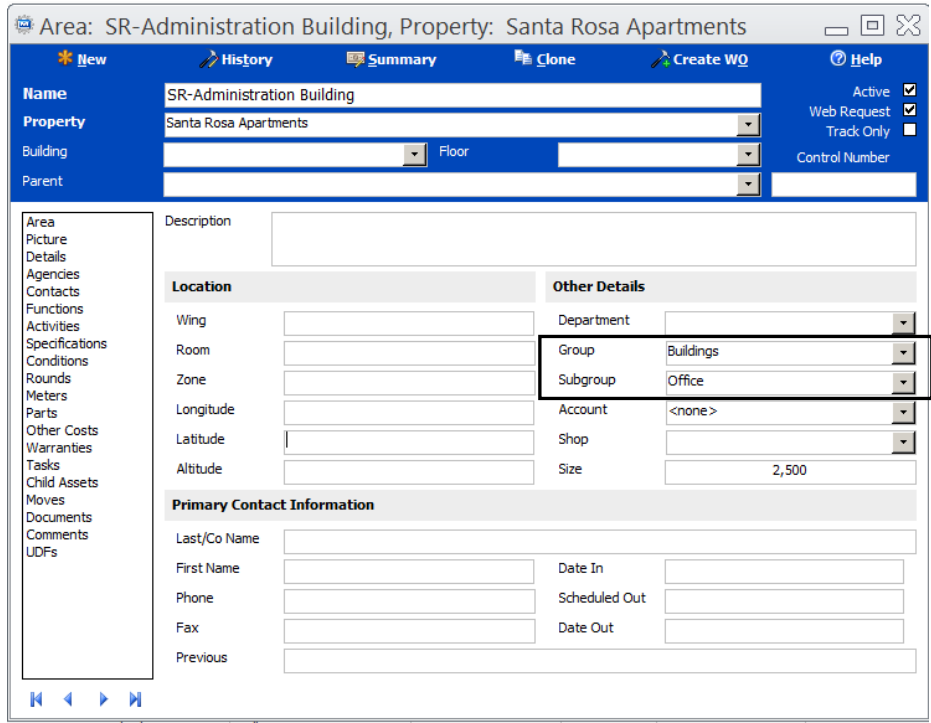


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Group and Subgroup are in the Other Details section of the Asset record.



The screenshot shows the 'Other Details' section of an asset record. The 'Group' dropdown is set to 'Buildings' and the 'Subgroup' dropdown is set to 'Office'. Other fields include Department, Account, Shop, and Size (2,500). The 'Primary Contact Information' section includes fields for Last/Co Name, First Name, Phone, Fax, Date In, Scheduled Out, and Date Out.

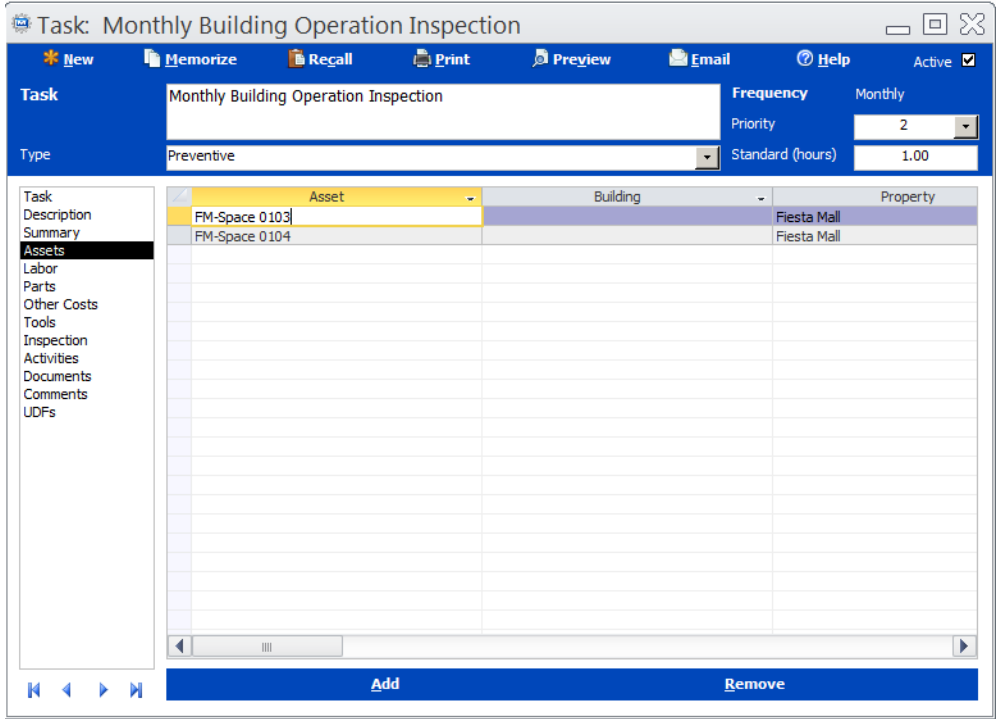
The group and subgroup are selected from the dropdown list.

Groups and subgroups are filters in Asset selection for Tasks.

On the MM Actions tab => Tasks => double-click Task to open.

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Go to the Assets form on the Task: Click Assets in the sidebar.

Click: **Add** to add an asset (s) to the Task.

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Task: Monthly Building Operation Inspection

New Memorize Recall Print Preview Email Help Active

Task: Monthly Building Operation Inspection Frequency: Monthly
Priority: 2
Type: Preventive Standard (hours): 1.00

	Asset	Building	Property
Task	FM-Space 0103		Fiesta Mall
Description	FM-Space 0104		Fiesta Mall
Summary			
Assets			
Labor			
Parts			
Other Costs			
Tools			
Inspection			
Activities			
Documents			
Comments			
UDFs			

Add Remove

The Select Asset(s) for Task . . . will be displayed.



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Select Asset(s) For Task: Monthly Building Operation Inspection

Asset	Description	Type	Building
Air Handler 01		Equipment	CS
Air Handler 01B		Equipment	CS
Air Handler 02		Equipment	CS
Air Handler 03		Equipment	CS
Air Handler 04		Equipment	CS
Air Handler 05		Equipment	CS
Apartment100Garden	Manor Apartment - 2-bedroom	Area	
Apartment101Garden	Manor Apartment - 2-bedroom	Area	
Apartment102Garden	Manor Apartment - 2-bedroom	Area	
Apartment103Garden	Manor Apartment - 2-bedroom	Area	
Apartment104Garden	Manor Apartment - 2-bedroom	Area	
Apartment105Garden	Manor Apartment - 2-bedroom	Area	
Apartment106Garden	Manor Apartment - 2-bedroom	Area	
Apartment107Garden	Manor Apartment - 2-bedroom	Area	
Apartment108Garden	Manor Apartment - 2-bedroom	Area	
Apartment109Garden	Manor Apartment - 2-bedroom	Area	
Apartment110Garden	Manor Apartment - 2-bedroom	Area	
Apartment111Garden	Manor Apartment - 2-bedroom	Area	

Filter By

Property

Building

Type

Group

Subgroup

Department

Find/Sort By

Asset Type Department

Building Group Control Number

Property Subgroup Description

Clear Filters New OK Cancel Help

All of the assets in the MM database are displayed.

To narrow the Asset list: filter the assets by group. Filter by selecting the group from the dropdown list.



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Select Asset(s) For Task: Monthly Building Operation Inspection

Description	Type	Building	Property
Dover Elevator	Equipment		Commerce Squar
Dover Elevator	Equipment		Commerce Squar

Filter By

Property

Building

Type

Group

Subgroup

Department

Find/Sort By

Asset

Building

Property

Type

Group

Subgroup

Department

Control Number

Description

Clear Filters
New
OK
Cancel
Help

The Group – Elevators was selected. The Equipment Asset list narrowed to two elevators.

Assets: Create, Clone, Generate

Select Asset(s) For Task: Monthly Building Operation Inspection

Asset	Description	Type	Building
Managers Office		Area	Administration B
SR-Administration Building		Area	
SR-Building A		Area	
SR-Building B		Area	
SR-Building C		Area	

Filter By

Property

Building

Type

Group

Subgroup

Department

Clear Filters New OK Cancel Help

Find/Sort By

Asset Type Department

Building Group Control Number

Property Subgroup Description

The Group – Buildings was selected. The Area Asset list narrowed to five buildings. The list of assets can be narrowed further by filtering the Subgroup.

Assets: Create, Clone, Generate

Select Asset(s) For Task: Monthly Building Operation Inspection

Group	Subgroup	Asset	Description
Elevators	Passenger	Elevator A	Dover Elevator

Filter By

Property

Building

Type

Group

Subgroup

Department

Find/Sort By

Asset Type
 Building Group
 Property Subgroup

Department
 Control Number
 Description

Clear Filters
New
OK
Cancel
Help

The facility has only one equipment asset designated as passenger elevator.

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Select Asset(s) For Task: Monthly Building Operation Inspection

Asset	Description	Type	Building
SR-Administration Building		Area	

Filter By

Property
Building
Type
Group Buildings
Subgroup Office
Department

Find/Sort By

 Asset Type
 Building Group
 Property Subgroup Department
 Control Number
 Description

Clear Filters
New
OK
Cancel
Help

The facility has only one designated area asset as office building.

Select (highlight) the asset(s) to assign to the Task.

Note: Use <CTRL> and <Shift> keys to select multiple specifications.

Click: **OK**