



Creating an Asset




Assets records allow the tracking of work done on a piece of equipment. This work can be reactive or preventive. The asset record allows the tracking of information about the piece of equipment. The asset can be a child of another asset, or the parent of other assets.



1. From the menu, under **Asset Management**, select **Master Asset Profile**

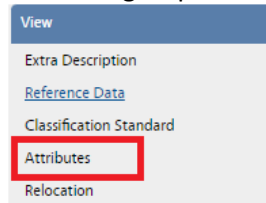


2. Click AssetSync Import hyperlink and then click 
 - a. Alternatively, you can click  from the menu.

 A screenshot of the 'AiM Master Asset Profile' form. The top bar shows 'Save' and 'Cancel' buttons. The main form area has a yellow header with the asset ID 'EQ050132' and a 'Last Edited by DALLACE UNGER On 4/12/23 9:51 AM' timestamp. On the left is a sidebar with various tabs like 'Extra Description', 'Reference Data', etc. The main form contains several input fields: Region, Facility, Property, Location, Warehouse, Bin, PM Route, Route Sequence, Lockout/Tagout (set to 'No'), Manufacturer, Model, Serial Number, Part, Status, Asset Type, Asset Group, Rentable (set to 'No'), and Replacement Tag. Many of these fields have a magnifying glass icon, indicating a search function.

3. **Asset ID:** AiM will default a system generated number, prefixed with an “EQ.”
4. Enter a **Description**, which should identify the asset.
5. Enter **Region**, **Facility** and **Property**. (If known, click:  to search to the correct value.)
6. **OPTIONAL-** Enter **Location**. (If unknown, click:  to search to the correct value.)
7. **Lockout-Tagout (LOTO)** is a safety procedure which is used to ensure dangerous machines are properly shut off and not started up again prior to the completion of maintenance or service work. The LOTO field in AiM has limited functionality, it is only an end-user notification. **Choose ‘Yes’ if the asset requires a lock out / tag out procedure when performing maintenance.**
8. Enter the **Manufacturer**. (If unknown, click:  to search to the correct value.)
9. Enter the **Model** and **Serial Number**. **Part** is optional, and only valid if it is an actual part in inventory.

10. Select an **Asset Group**. (If unknown, click:  to search to the correct value.) You will first be asked to select the Asset Type. Most often it will be **SERIALIZED**. The **Status** will be automatically filled in.
11. For the **Status**, click:  if you need a different **Status**.
12. From **View menu**, click the **Attributes** hyperlink to see if this **Asset Group** has any attributes that need to be filled in. Attributes vary based on asset group.




AiM Attributes

Done Cancel

EQ050041 Last Edited by ANDREW CALVO On 9/30/22 9:28 AM

VFD (SUPPLY FAN / AIR HANDLER)

Sequence	ID	Attribute	Value	Description
1	1	HORSEPOWER	30	HORSEPOWER
2	2	EQUIPMENT SERVED		EQUIPMENT SERVED
3	3	VOLTAGE	208/230	VOLTAGE
4	4	FREQUENCY	22kW	FREQUENCY

13. On the Master Asset Profile screen, click .
14. If known, add the CU ID and the Unifier Project Number in the User Defined Fields

AiM User Defined Fields

Done Cancel


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VFD (SUPPLY FAN / AIR HANDLER)

CU ID

Unifier Project Number

Click Done to continue.

15. Under Account Setup, enter the Account, Subcode and Percentage.
16. On the Master Asset Profile, click: . The procedure is done.

AIM Master Asset Profile

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VFD (SUPPLY FAN / AIR HANDLER)

Region: UCB	PM Route	
UNIVERSITY OF COLORADO BOULDER	Route Sequence	
Facility: MAIN CAMP	Lockout/Tagout: No	
Property: 378A	Manufacturer: ABB	Status: ACTIVE
JASON'S LIGHTNING GARAGE AND LOUNGE (LTNG)	ABB MANUFACTURING	Asset Type: SERIALIZED
Location	Model: ACH550	Asset Group: VFD
Warehouse	Serial Number: 1004	VFD
Bin	Part	Rentable: No
		Replacement Tag

Component Asset

Sequence	Asset	Description	Asset Type	Asset Group	Replacement Tag	Status