Asset Management

Disclaimer

Fleet-Net ® Corporation, wholly owned subsidiary of Avail Technologies, Inc. makes no warranties about the contents of the manual and specifically disclaims any implied warranties of merchantability or fitness for any particular purpose. Fleet-Net ® Corporation, wholly owned subsidiary of Avail Technologies, Inc. further reserves the right to make changes to the specifications of the program and contents of the manual without obligation to notify any person or organization of such changes.

Copyright Notice

This software package and manual are copyrighted 2018. All rights reserved worldwide. No part of this publication may be reproduced, transmitted, transcribed, stored in any retrieval system or translated into any language by any means without the express written permission of Fleet-Net ® Corporation, wholly owned subsidiary of Avail Technologies, Inc., 9183 W. Flamingo Rd., Suite 110, Las Vegas, Nevada 89147.

License Agreement

The software described in this manual is furnished under a license agreement and may be used or copied only in accordance with the terms of the agreement. Failure to sign this agreement and still use the software is illegal.

Trademark Acknowledgment

Fleet-Net® is the Registered Trademark of Fleet-Net ® Corporation, wholly owned subsidiary of Avail Technologies, Inc. Microsoft®, Access®, Windows®, the Windows® Logo, and other Microsoft® Office Products are either registered trademarks or trademarks of Microsoft® Corporation in the United States and/or other countries. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.

TABLE OF CONTENTS

About This Guide

This guide contains standard procedures for operation and a description of each feature released with the module. The module description provides the intended application or use of the module and any comments that relate to this specific module.

Below are features that our used through FNW applications.

To correctly exit a form, click on the Fleet-Net® Icon located in the upper right of every form.

**When the binoculars search function is not available, nor a drop-down list, select 'Ctrl F' as a search tool.

When using this button to search the following sample form will open up. Use anyone of the search item criteria down to find your item select it and it will populate at the bottom of this form. To populate the previous form with the selected item simply hover over the item # and double click it. Close the search form.

Throughout Fleet-Net® modules, there are Green Check marks that will appear next to specific fields. These Green Checkmarks when selected will open the Misc. List Codes form allowing the user to setup the necessary codes and their value for the associated field.

The clock button allows for changing the time entry.

The question mark button opens the search option.

The Stop button cancels the current selection process.

The calendar button allows for quick selection of a specific date via a calendar. Calendar defaults to current date.

The calculator button allows for quick simple calculations on the fly. It opens up your systems calculator.

About Asset Management

Asset Management encompasses all facets of facilities/asset management, from managing work orders, executing preventative maintenance, monitoring cost, warranty tracking, incident reporting, life cycle assessments and other aspects which allow the transit to keep its stock in a "State of Good Repair" (SGR).

Fleet-Net's Asset Management module allows for a strategic and systematic process of operating, maintaining, upgrading, and expanding physical assets effectively throughout their life cycle. It focuses on business and engineering practices for resource allocation and utilization, with the objective of better decision-making based upon quality information and well-defined objectives.

The FTA defines "state of good repair" as follows: "An asset or system is in a state of good repair when no backlog of capital needs exists – hence all asset life-cycle investment needs (e.g., preventive maintenance and rehabilitation) have been addressed and no capital asset exceeds its useful life." The following functionalities within Fleet-Net's Asset Management provides for data and decision support for each step within the Asset Management process in order to keep the inventory in a state of good repair.

The objective is to comply with FTA's request by allowing for the systematic tracking of data and decision support in order to comply with the requirements and control cost management in order to keep assets in an SGR.

AM Setup Checklist

Asset Management module interfaces with General Ledger, Inventory and Work Orders. The chart of accounts and inventory must be set up before initializing Asset Management.

Done	**Menu**		**Program/Procedure**
_____	AM15 #1	(a)	Edit Miscellaneous Codes
_____	AM15 #2	(b)	Modify/Add Problem Codes
_____	AM15 #3	(c)	Email Notification Setup
_____	AM15 #4	(d)	Image Path Setup
_____	AM15 #5	(e)	User Defined Data Entry (if applicable)
_____	AM15 #6	(f)	User Defined Field Entry (if applicable)
_____	AM15 #7	(g)	User Defined Security Setup (if applicable)

Asset Management Setup

Modify /Add Miscellaneous Codes

Each Fleet-Net application includes a list of miscellaneous codes that are used within the system. Some of these codes are preset by Fleet-Net (Specific) while others are user defined.

Note: Asset Management has grown out of the Work Order Module. Because of this, there are set up items that are in WO, not in AM. For example, Asset Type is set up in WO, not in AM.

Select Edit Miscellaneous Codes; the following form displays:

Modify / Add Misc List Codes

Module: AM

Type:
AssetClass
AssetSubClass
DocumentCode
NotificationGroup
ProblemCode
ProblemResolution
UserDefinedFieldType
UserDefinedFormName

Print

Following are samples and specifics for miscellaneous codes used in the Asset Management module:

AssetClass: (User Defined)

Modify / Add Misc List Codes

Module: AM

Type: AssetClass

Code	Value
B100	Buildings
CE100	Communication Equipment
FC100	Facilities
GE100	Garage Equipment
IT100	IT Equipment
ME100	Maintenance Equipment
MS100	Miscellaneous Equipment
RV100	Revenue Vehicles
S&S100	Shelters & Signage

Print

AssetSubClass: (User Defined)

DocumentCode: (User Defined)

NotificationGroup: (User Defined)

ProblemResolution: (User Defined)

UserDefinedFieldType: (Specific) *these should be set up just like this.*

Code	Max Field Size	Field Type	Value
Enter the codes exactly as shown above	6	Alpha	Enter the values exactly as shown above

UserDefinedFormName: (User Defined)

Modify/Add Problem Codes

Problem Codes are user defined for each Asset Type. To add Asset Types click the *green checkmark*.

Field Name	Max Field Size	Field Type	Description
Asset Type	1	Alpha-Numeric	Select the applicable Asset Type code from the drop-down list. There are codes that are reserved for other modules. Do not use in Asset Management (**V** for Vehicles, **I** for **Inventory, C for Component, O for Other and P for Project).**
Problem Code	5	Alpha-Numeric	Enter a code to identify the specific problem based on the selected asset type
Description	50	Alpha-Numeric	Enter a description to define the problem code
Priority #	15	Number	Enter a priority. The lower the number, the higher the priority
WO Class	25	Alpha-Numeric	Select the Work Order class code from the drop-down. These codes are set up in WO module on the WO setup menu. When these are set up, GL codes can be added so the Work order will be charged to the correct account.
Notification Group	4	Alpha-Numeric	Select the Notification Group from the drop-down list. These codes are set up in the AM module under Modify/Add Miscellaneous codes *NotificationGroup*
Print			Click Print to view/print a list of problem codes for the selected Asset Type

Email Notification Setup

Use this form to enter all applicable emails that alerts can be sent to. Email notifications are based on a User Defined Group(s). For example BG (Buildings & Grounds) list emails that are defined in that notification Group.

Select the Notification Group from the drop-down list the following form displays:

Field Name	Max Field Size	Field Type	Description
Record #	5	Number	Enter a sequential number for each record created
Email Address	50	Alpha-Numeric	Enter email address for this contact
Phone #	10	Number	Enter the phone number for this contact
Contact Name	40	Alpha-Numeric	Enter the name of the contact person
Inactive			Check this box to make a specific contact inactive. If a contact is flagged as inactive, no emails will be sent to that contact.

Image Path Setup

Use this form to enter the path to images pertaining to a specific asset type. These images are then assigned and accessed via the Asset Maintenance form under the Picture button option.

Click the *drop-down* to view a list of Asset Types. This list is saved in the Work Order module. Do not delete any records from the selection list.

Select the *Asset Type* from the drop-down list. Click *Enter*; the following form displays:

Field Name	Max Field Size	Field Type	Description
Asset Class			Select the Asset Class from the drop-down list
Class Description			Auto-populates based on the Asset Class selected
Path to Image File	50	Alpha-Numeric	Enter the path to the directory associated with the selected Asset Class
Image Files			Each time a new image is saved in the image folders this option must be selected in order to update the catalog. The update refreshes the catalog so that image can be seen via the Pictures button option within Asset Maintenance.

User Defined Database Setup

The following User Defined forms allow the user to create their own custom fields that can later be accessed via different standard entry forms such as Manage Assets and User Defined Data Entry. The user is able to create multiple new fields and specify between one of three formats for each new field: Text, Number and Date.

The fields created are then associated with a newly created form name. For example a new form titled Shelter Amenities may contain the new fields: Bench, Trash Can, Ramp etc. while another form titled Key may contain fields such as: Location of Key, Pad Lock Combination, Bio Metric Access etc.

The user can control which new forms each Fleet-Net user is permitted to see blocking access to forms that may contain confidential information or simply restricting the user to the form that they are to manage.

User Defined Data Entry

This form allows users that are not granted security access to the Asset Maintenance option to enter and maintain data entered into the user created data forms.

User will select the Form Name from the drop-down list:

Enter the *Asset Type* and the *Asset Number*
Click *Enter* to complete the fields.

Double click the field data to display historical records for the data field. All entries for this selected field will display.
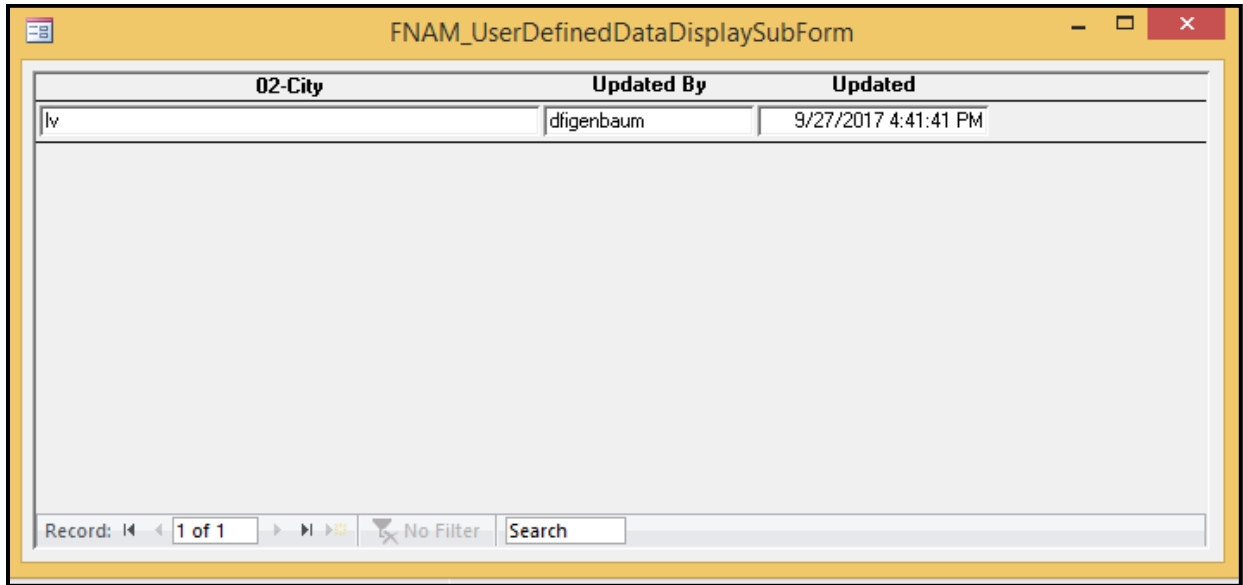
Click **Print** to display/print a report with all field changes.

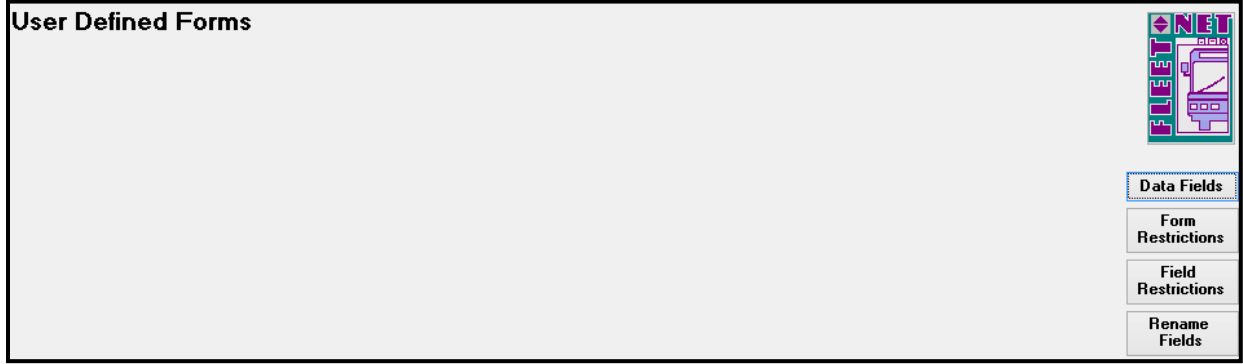The confirmation message displays click Yes to continue, No to cancel


The following report displays:

User Defined Data Field Entry

Allows for tracking of information for Assets by defining a form and creating custom fields.

Data Fields

Create a field name and the data type that the field will allow (Date, Text or Numeric). The fields created via this option can be used by any form. This button option contains the "pool" of all the fields that can be used by any user form. The fields created will display in alphabetical order so if a certain order is desired prefix the field name with a number as seen in the example. Check the History checkbox to track all changes to this field.
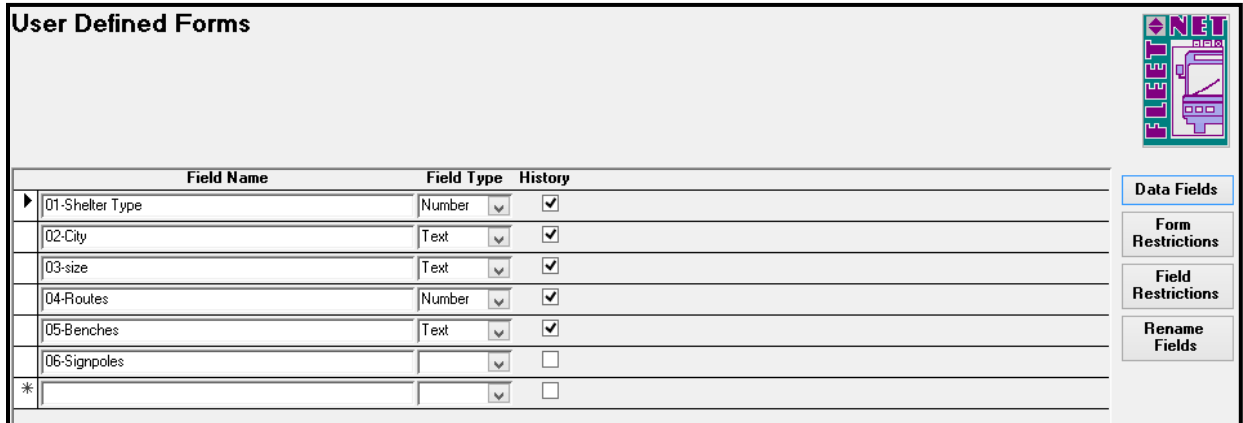
Form Restrictions

Create a new User Form Name via the green check mark.
Assign the new form name within the code and value fields.

Select the newly created form name under the User Form Name drop-down option.

Assign the Fleet-Net Form Name to use for data entry. This controls which standard Fleet-Net forms will display the newly created form. In the example below FNAM_AssetMasterForm was selected which is the main form that allows the user to create new assets. This will allow the users to access the newly created user form "Amenities" and "Key" within the Asset Master form. Another form that you may want to add so that access is granted to the user form is FNAM_UserDefined DataEntryForm.

Asset Management Setup…..*continued*

Field Restrictions

Within this form the user is making a correlation between the user form and which fields from the pool of fields are assign to it. In this case the user form "Amenities" has been assigned all of the fields seen below.

Rename Fields

This option allows field names to be changed/renamed by selecting the Old Field Name and entering a new name within the New Field Name and clicking the Start button.

User Defined Security Setup

Within this form we are assigning which Fleet-Net users are permitted to access the newly created User forms. The user form may contain confidential data that will be entered into the fields or maybe certain individuals are responsible for maintaining certain user forms. Select the Fleet-Net user from the User Id drop-down option whom you wish to give access to. Then below in the Form Name drop-down select the user form/s that they will be permitted to access.
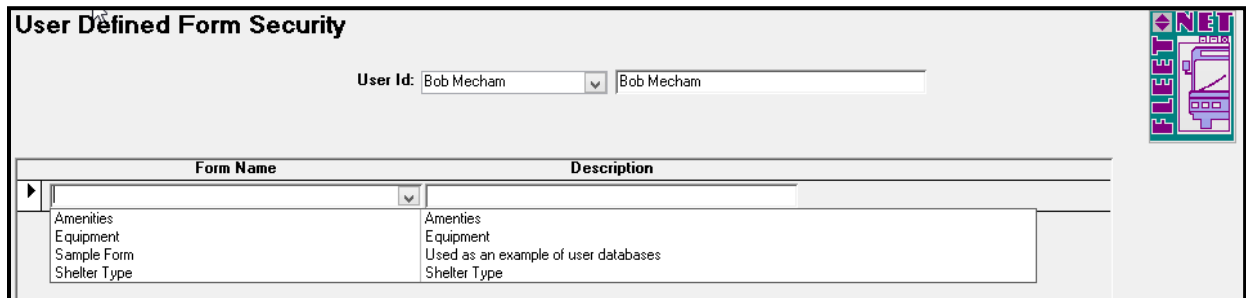

Select the Fleet-Net user from the User Id drop-down list.

Use the drop-down arrow within the Form Name field to select all of the user created forms that the user is permitted to access and maintain.
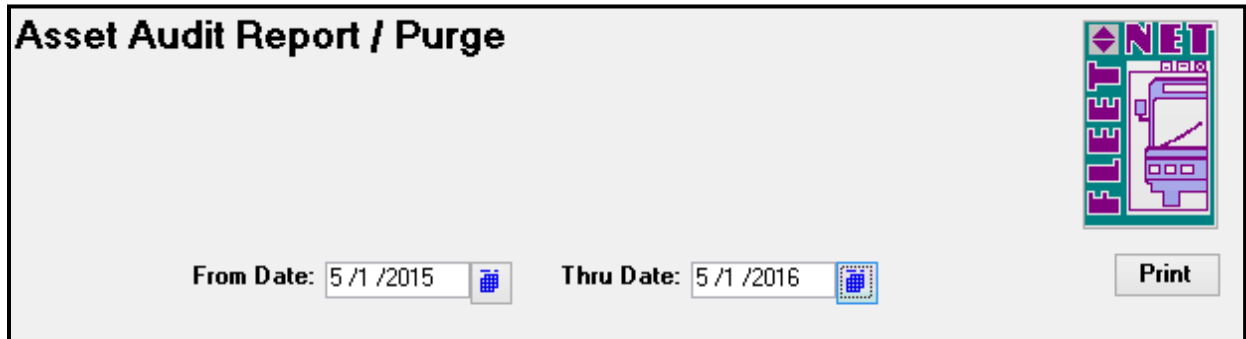

Asset Audit Purge Form

Use this form to Purge Audit data. Using this form will NOT delete the asset just the audit data.
Enter the starting and ending dates for the report/purge; click Print the following report displays:

Sample Transit
Asset Audit Purge Report

From Date: 5/1/2015   Thru Date: 5/1/2016

Asset #: 111-A

Table Name: FNVM_ComponentMasterTable

Update Date	Field Name	Before	After	Updated By
8/5/2015 4:49:58 PM	ComponentNo	New record	111-A	pdodd
8/5/2015 4:50:29 PM	Specifications		Shelter at first and Main	pdodd
8/5/2015 4:50:29 PM	AssetClass		BusStops	pdodd
8/5/2015 4:50:29 PM	AssetSubClass		TC	pdodd
2/15/2016 11:40:08 AM	AssetClass	BusStops	60	pdodd
2/26/2016 3:07:57 PM	DatePutInService		1/1/2012	pdodd
2/26/2016 3:07:57 PM	LifeExpectancyMonths		120	pdodd
2/26/2016 3:07:57 PM	LifeCycleCondition		G	pdodd
2/26/2016 3:07:57 PM	VisualAssessment		G	pdodd

Assets with changes made during the date range selected will be included on the report/purge. Once the print preview is closed, the following message displays. If the audit data is NOT to be deleted, click No. If the audit data is to be deleted click Yes.
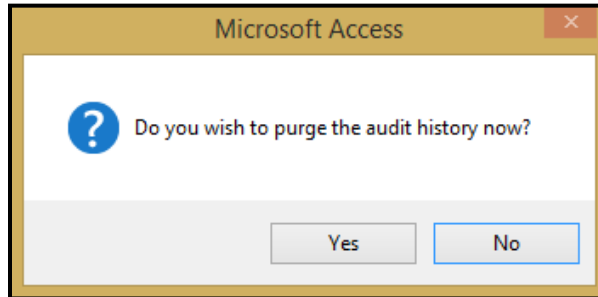
NOTE: Access to this menu item should be restricted to supervisors.

Tran Control Setup

This is used for numbering of incidents (created in Option #6, Incidents, on the main AM menu).
In the example below, Value is 0, hence the **next** incident created will be 000001, based on the set up.

Transaction Control Record Setup Form

Record Type	Value	Maximum Value	Max Digits	Add Leading Zeros
IncidentNo	0	999999	6	✔
				☐

ASSET MANAGEMENT

Manage Assets

Click Manage Assets to add or modify Assets; the following form displays:

Asset Management Module
Click the *green checkmark* to view a list of Asset Types. This list is saved in the Work Order module. Do not delete any records from the selection list that displays after clicking the green checkmark.

Modify / Add Misc List Codes

Module: WO
Type: AssetType

Code	Value
B	Buildings
C	Componets
E	Equipment
F	Facilities
G	Grounds
I	Inventory
O	Other
P	Projects
R	Regional
S	Systems
T	Transit Stations
V	Vehicle
X	Shelter

Print

To create a new asset select the applicable *Asset Type* from the drop-down and click *New*. Enter a new Asset Number in the Asset # field. The following confirmation message displays:
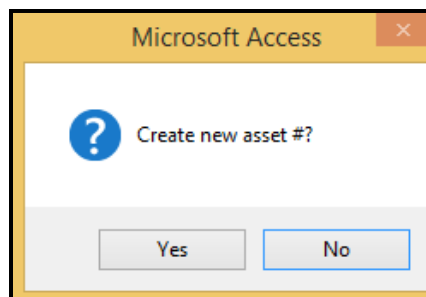
Asset Maintenance

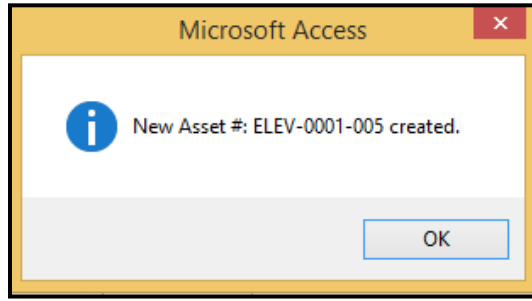Asset Type: F ✓ Facilities
Asset #:

Create New Asset #

Asset #:

Start

Master
New
Notes
Warranty
Inspection
History
Delete
Sub Assets
User Data
Audit
Condition
Purchasing
Work Orders
Location
Certifications
Picture
Clone
Renumber

Microsoft Access

? Create new asset #?

Yes   No

Click *yes* to proceed with the creation of a new asset or *No* to cancel.

The following form displays when a new asset is created. Use the table below for an explanation of each field.

Note: Asset # and Component # from the VM module share the same table therefore there cannot be an asset with the same name/number as a component.

Field Name	Max Field Size	Field Type	Description
Description	255	Alpha-Numeric	Enter a description to define the asset
Serial #	20	Alpha-Numeric	Enter the serial number of the asset, if applicable
Specifications	255	Alpha-Numeric	Enter manufacturer's specs
Asset Type			Auto-populates based on the Asset Type selected at the top of the form
Asset Class			Select the applicable Asset Class from the drop-down list. Examples of Asset Classes: Buildings, Equipment, IT Equipment, etc.
Asset Sub-Class			Select the applicable Asset Sub-Class from the drop-down list. Examples of Asset Sub-Classes: Elevators, HVAC, etc.
Model	30	Alpha-Numeric	Enter the model number, if applicable
Manufacturer	30	Alpha-Numeric	Enter the manufacturer, if applicable
Model Year	4	Number	Enter the model year, if applicable
Installed on Asset Type			If the asset is installed on another asset, select the asset type from the drop-down list. This list is similar to the list created for Asset Type. Asset Types C, V, I, O and P are reserved for the maintenance modules and cannot be used in Asset Management.
Installed On Asset #			Select the Asset Number of the asset that this asset is installed on.
Updated			Auto-populates with the user name, date and time and form which last updated the Asset record.
Created			Auto-populates with the user name, date and time and form which initially created the Asset record.
Sub Asset			Check this box if the asset being created is a sub asset of a main asset.
Asset is Inactive			Check this box to flag the asset as inactive. Assets marked as inactive no longer appear in the Work Order module or on various reports.
Out of Service Date		Date/Time	Enter the date and time mm/dd/yyyy hh:mm AM/PM the asset goes out of service. The asset is updated automatically if put out of service via the Work Order module.
Out of Service Code			Select an out of service code from the drop-down list. Codes come from the Vehicle Maintenance Module; Setup Vehicle Status.
Out of Service Elapsed Days			Number of days from Out of Service Date to current date that is automatically calculated by the system.
Date Last Cleaned		Date/Time	Enter the date and time mm/dd/yyyy hh:mm AM/PM the asset was last cleaned, if applicable.
Cleaned Elapsed Days			Number of days from Date Last Cleaned to current date that is automatically calculated by the system.

Master

Click *Master* to view or enter asset information. If other button options are selected the Master Button will return the user to the master form.

Notes

Click *Notes*; the following form displays. This option will display comments, file attachments (i.e., Word Doc, PDF file, Spreadsheet etc.), hyperlink and/or images. Notes allows the user to attach a variety of documents that pertain to the specific asset such as a repair manual, an image of the asset itself, the contract signed to obtain the asset. For shelters it can be used to attach a picture of the shelter and all of the amenities associated with it.

Select the Asset Type and Asset Number from the drop-down lists.

Asset Management Module
Select the *Documents Code* from the drop-down list; the following form displays:

Field Name	Max Field Size	Field Type	Description
Reference	30	Alpha-Numeric	Enter a reference specific to this comment/attachment (i.e. document name, date, etc.) This is a required field.
Comment	255	Alpha-Numeric	Enter any applicable comment. Entries are time date and user stamped
Attachment			Right click in this field to activate the attachment process
Hyperlink			Enter the path to any desired hyperlink

Warranty

Click *Warranty* to assign a warranty from the All Warranties field. Once assigned, select from the assigned warranties field and enter the warranty information. Multiple warranties can be assigned to an asset. Warranties can be setup for days, miles or hours. Use the green checkmark to create new warranty types.

Inspection

Click *Inspection* to assign an inspection from the All Inspections field.

If the inspection has never been assigned to the asset the following prompt displays. Click **yes** to proceed with the assignment of the new inspection or **No** to cancel.
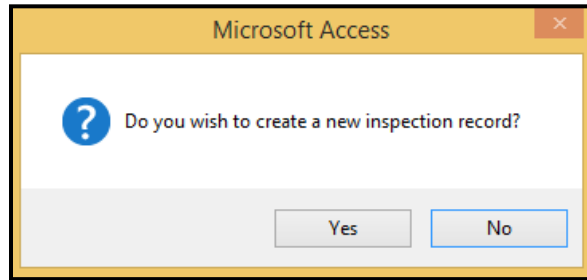
If the inspection has already been assigned click the **Assigned Inspections** drop-down to make the selection. Multiple Inspections can be assigned to an asset.

The inspection form displays the listing of the remaining miles, hours or days before the inspection is due. The forecast and actual figures come from Inspection Types setup. If an inspection Work Order is currently open for the asset the Assigned Work Order field will be populated. 'Last done' is populated automatically by the Work Order module or can be manually revised. Click **Reset to Zero** for Work Order update to reset the *'Since'* field(s) to zero.

Field Name	Max Field Size	Field Type	Description
Inspection #			Select the applicable Inspection number from the drop-down list
Current Date			Auto-populates with the current system date and time
Last Done			Auto-populates with the Open Date of the last inspection work order
Reset to Zero?			Check the box to indicate when the miles, hours, and days should be reset to zero when an inspection is performed. If Reset to zero is unchecked, the miles and hours since the inspection was performed will carry over to the next inspection. This will populate the Since field. EXAMPLE: The inspection Forecast miles are set to 4500 miles and the Actual miles are set to 5000 miles. If the inspection was performed at 4700 miles, then 200 miles would carry over and populate the Since field.
Assigned Work Order			Auto-populates when an inspection work order is generated for the selected asset.

History

Click **History** to view statistical history such as labor, material, outside costs, failures and more for month to date, year to date and life to date. The history stats are updated based on the transaction date used.

Select the year and month combination to view and the click the Display Totals button.

The following form displays listing all of the statistics for the time period selected.

Click the **Maintain Totals** button to revise the data. This option should rarely be used since all Work Order updates automatically update these fields. This option should only be used if by chance there was a system failure and the Work Order update did not complete correctly or if for some reason the parts or labor are not going to be processed through a Work Order.

(Place strict procedural controls on who is permitted to revise data within the history area. Consider allowing users to access the Asset Inquiry option which displays similar data but in a different format but will not permit the user to make any changes.)

Delete

Click **Delete** to purge the asset from the Asset Management form. In order to delete the asset the asset must be flagged as inactive and it must be uninstalled from any asset.

Click **yes** to delete the Asset and *No* to cancel.
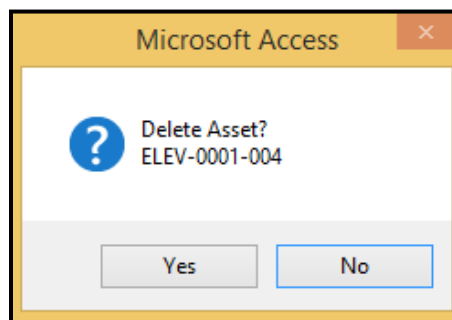
If the asset is still in an active status the following prompt displays and the asset will not be deleted. Click **Ok**.
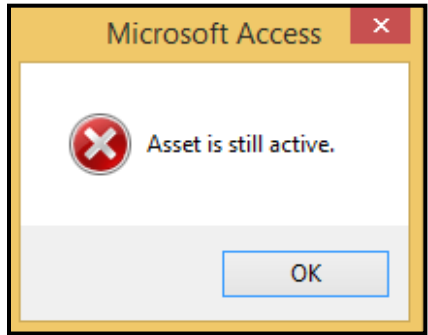
If the above criteria has been met the asset will be deleted and the following prompt displays confirming deletion of the asset.
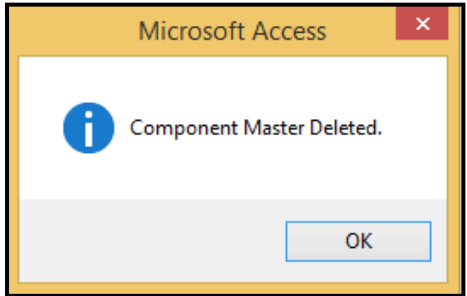
Sub Assets

Click **Sub Assets** to assign child assets to the parent asset. In the example below the three sub assets are created in the same manner as other assets but they are sub components of the main elevator. These three assets are part of what make up the parent or master asset. Sub assets may be created because they follow a different inspection cycle or need to track serial and model numbers or setup unique warranty periods for the sub asset itself. Once the Sub Asset button is selected the following form displays listing all of the sub assets that have been installed onto the parent asset. This is done by accessing the sub asset record master and entering the parent asset number into the *Installed on Asset #* field.

Asset Management Module

Hover over the sub asset number. The help message will display: "Double-Click to select this component". Double click the **asset number** and the form will populate the sub asset number at the top of the form to bring up the sub asset master.

User Data

Click **User Data** to enter data into the custom fields created using the User Data setup options. Refer to User Data section of this manual for instructions on how to create the new user defined fields. More than one Form Name option can be created.

Click the drop-down arrow on the Form Name field and select the applicable form.

Asset Management Module
In the example below a form name was created called "Amenities" the six custom fields Shelter Type, City, Size, Routes, Benches and Sign poles were created by the user. Once the custom fields display, click in the blank fields to the right and enter data.

When a user is creating a new Form Name they have the option when creating the individual field to flag it whether the history of that field should be kept or not. To determine if the field was created to keep history hover over the field to see the prompt "**Double-Click for history".**

Once the field is double clicked if history exists the following form will displays:

Click the **_print_** button to view/print a report of the data listed in the fields.

The following prompt displays: click _Yes_ to print the historical data of the fields as well as the current or _No_ to print the current data only.

The following report displays:

Audit

Click **Audit** to view the history of all of the fields contained within the Asset Maintenance form. The user can selectively pick a particular field to review or check *All Fields* to see all data changes. User can select from and through dates for which changes took place and can either *Display* or *Print* the data.

The Field Name drop-down option will only display fields that have had changes made to the data not including the initial setup. The audit will also track data entered at the sub form level for options such as Warranty, Inspection, and History etc.

Check the **All Fields** box to view all data changes. Enter a from date and through date or leave the date fields blank to view all changes made.

Click **Display** and the following form displays. It will list the date the change took place, the field changed, what the old value of the field was and New Value field will illustrate to what it was changed. The last field will identify the user who made the change.

The *Print* option displays the same data as display but in report format ready to print.

Asset Maintenance Audit Report

Asset #: ELEV-0001-004   Elevator, Roped hydraulic Single Slide Door

Table Name : FNVM_ComponentMasterTable

Update Date	Field Name	Before	After	Updated By
7/25/2017 12:00:17 PM	ComponentNo	New record	ELEV-0001-004	dfigenbaum
7/25/2017 12:05:21 PM	Description	New asset	Elevator, Roped hydraulic Single Slide Door	dfigenbaum
7/25/2017 12:05:21 PM	SerialNumber		BF-456444	dfigenbaum
7/25/2017 12:05:21 PM	Specifications		Low rise, 75 meter limit, 7 stops, 50 sq ft, BF-456444	dfigenbaum
7/25/2017 12:05:21 PM	Model		LVME 21	dfigenbaum
7/25/2017 12:05:21 PM	Manufacturer		Otis Elevators	dfigenbaum
7/25/2017 12:05:21 PM	ModelYear		2017	dfigenbaum
7/25/2017 12:05:21 PM	AssetClass		B100	dfigenbaum
7/25/2017 12:05:21 PM	AssetSubClass		Elevator	dfigenbaum
7/25/2017 12:09:57 PM	WarrantyDescription		Full Warranty- Cabin and Components	dfigenbaum
7/25/2017 12:09:57 PM	WarrantyDateBegin		1/2/2017	dfigenbaum
7/25/2017 12:09:57 PM	WarrantyDateEnd		1/2/2021	dfigenbaum
7/25/2017 3:14:10 PM	DatePutinService		7/1/2017	dfigenbaum
7/25/2017 3:14:10 PM	LifeExpectancyMonths		60	dfigenbaum
7/25/2017 3:14:10 PM	LifeCycleCondition		Excellent	dfigenbaum
7/25/2017 3:14:10 PM	VisualAssessment		New	dfigenbaum
9/27/2017 2:36:03 PM	SubComponent	False	True	dfigenbaum
9/27/2017 2:36:15 PM	SubComponent	True	False	dfigenbaum

Table Name : FNVM_InspectionMasterTable

Update Date	Field Name	Before	After	Updated By
7/25/2017 12:19:33 PM	ResetInspectionFlag	False	True	dfigenbaum

Condition

Click *Condition* to track the assets Life Expectancy, Condition and Overhaul occurrences. It is also a valuable tool that can be used for determining replacement costs of the transit agency's investment property. These options will assist the user in complying with the mandate for State of Good Repair/Map21.

Asset Maintenance

Asset Type: F ☑ Facilities
Asset #: ELEV-0001-004 Elevator, Roped hydraulic Single Slide Door

Life Expectancy Miles:	Life Expectancy Hours:	Date In Service: 7/1/2017
Ltd Miles: 0.0	Ltd Hours: 0.00	Life Expectancy Months: 60
Miles Remaining:	Hours Remaining:	Life Cycle Adjustment:
% Miles Remaining:	% Hours Remaining:	Estimated Replacement: 7/1/2022
		Months Remaining: 58
Max Miles Overhaul:	Max Hours Overhaul:	% Months Remaining: 96.67%
Min Miles Overhaul:	Min Hours Overhaul:	
Miles Since Last Overhaul:	Hours Since Last Overhaul:	
Last Overhaul Date:	# of Overhauls: Days Since Overhaul:	

Life Cycle Condition: Excellent ☑ Excellent condition - like new
Visual Assessment: New ☑ Looks like new
Mileage When Retired: Hours When Retired:
Reason Retired: ☑
Date Retired: Actual Life Months:

Buttons: Master, New, Notes, Warranty, Inspection, History, Delete, Sub Assets, User Data, Audit, Condition, Purchasing, Work Orders, Location, Certifications, Picture, Clone, Renumber

Field Name	Max Field Size	Field Type	Description
Life Expeectancy Miles	20	Number	If measuring asset miles, enter the life expectancy in miles
Ltd Miles			Updated automatically by the system
Miles Remaining			Updated automatically: Life Expectancy Miles – Ltd Miles = Miles Remaining
% Miles Remaining			Updated automatically: Life Expectancy Miles – Ltd Miles = Miles Remaining in percentage format.
Max Miles Overhaul			Automatically calculated based on the miles between overhauls (rebuild work orders)
Min Miles Overhaul			Automatically calculated based on the miles between overhauls (rebuild work orders)
Miles Since Last Overhaul			Automatically calculated based on the service entries for the vehicle since the last rebuild.
Last Overhaul Date		Date	Enter the date of the last rebuild. When Rebuild Work Orders are updated for the first time the Work Order Open date will populate this field. All subsequent rebuild work orders will also update this field.
Life Expentancy Hours	20	Number	If measuring asset hours, enter the life expectancy in hours
Ltd Hours			Updated automatically by the system
Hours Remaining			Updated automatically: Life Expectancy Hours – Ltd Hours = Hours
% Hours Remaining			Updated automatically: Life Expectancy Hours – Ltd Hours = Hours Remaining in percentage format.
Max Hours Overhaul			Automatically calculated based on the hours between overhauls (rebuild work orders)
Min Hours Overhaul			Automatically calculated based on the hours between overhauls (rebuild work orders)
Hours Since Last Overhaul			Automatically calculated for the asset since the Last Overhaul Date.
# of Overhauls			This is the number of times this asset has been rebuilt. If the asset has never been rebuilt, enter a zero. When a rebuild work order is updated the number of rebuilds will increase. The Quantity Completed field on the Rebuild Work Order must be entered.
Days Since Overhaul			Automatically calculated based on the Last Overhaul Date versus the current system date.
Life Cycle Condition			Select the applicable rating from the drop-down list that best classifies the condition of the selected asset. This condition many times is based on the expected life condition possibly based on a manual. For example: New asset has an expected life of five years based on average use based on manual. If 5 conditions criteria exist 1= Excellent and 5=Unusable enter 1 when the asset is new and 5 on the fifth year. If asset is still in good condition then use next field Visual Assessment to indicate asset still in good condition.
Visual Assessment			Select the rating from the drop-down list the best classifies the condition of the selected asset
Mileage When Retired	20	Number	Enter the mileage when the asset was retired
Hours When Retired	20	Number	Enter the number of hours the asset had been in service when retired

Field Name	Max Field Size	Field Type	Description
Reason Retired			Select the applicable reason code from the drop-down list. Examples: Damaged, Sold etc.
Date Retired		Date	Enter the date the asset was retired.
Actual Life Months			Automatically calculated based on the difference between Date Retired and Date In Service.
Date in Service		Date	Enter the date the asset was put into service. Required field as many of the calculated fields are based off of this date.
Life Expectancy Months	4	Number	Enter the number of months the asset is expected to last
Life Cycle Adjustment	4	Number	Enter the number of months that the Life Expectancy Months should be adjusted by. For example if the asset is expected to be used heavily outside of average use then enter the number of month (enter negative #) to reduce the Months Remaining amount. Enter a positive number to increase Months Remaining because asset will get less than average use. Number of months entered here will affect the Estimated Replacement, Months Remaining and % Months Remaining fields.
Estimated Replacement		Date	Automatically updated by the system based on Date in Service plus Life Expectancy Months and any Life Cycle Adjustment months. The following fields are useful tools in the budgeting process to determine which assets are nearing the end of their useful life and will need to be replaced
Months Remaining			Automatically updated by the system
% Months Remaining			Automatically updated by the system

Purchasing

Click *Purchasing* to track the acquisition history for the selected asset. The Vendor, Purchase Order, Capital Asset and Contract numbers must already exist in the Accounts Payable, Contract and Fixed Asset modules. The user should have the actual Purchase Order available or use the Purchase Order Inquiries to ensure that the data entered is correct.

Field Name	Max Field Size	Field Type	Description
Vendor			Select the applicable vendor from the drop-down list
Date Received		Date	Enter the date the asset was received.
Inventory Item #			If the asset is an inventory item select the item from the drop-down list.
Capital Asset #			If the asset is included in the Fixed Assets module use the drop-down option to select the corresponding Fixed Asset number for this asset.
Purchase Order # / PO Revision #			Enter or use the drop-down list to select the purchase order and revision number associated with the purchase of this asset.
Contract #			Enter or use the drop-down list to select the contract number associated with the purchase of this asset.
Asset Cost	20	Number	Enter the purchase cost of this asset. If a Capital Asset Number was selected this field will automatically update with the cost found within the Fixed Asset module for this asset.

The following prompt displays if the Fixed Asset number selected within the Capital Asset # field is already assigned to another asset. This is not necessarily a problem simply a warning. Duplicate fixed assets on two different assets is possible if the parent asset and child assets are all the same Fixed Asset Number. The message displayed below the user is being alerted that the same fixed asset number is assigned to asset Elev-0001-001.
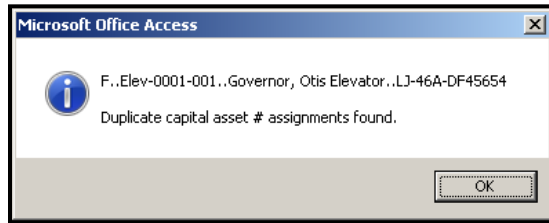
Work Orders

Click *Work Orders* to search for all work orders created for the selected asset. The initial form displays the last repair work order number and information on the installation work order. The Repair History button will allow the user to search the entire Work Order database for history on the selected asset.

The initial form displays the most recent work order created for the asset. The Installation Work Order Number also displays showing the Date Installed, Miles/Hours/Days since the installation data.

To view all work order history click *Repair History*; the following form displays. This form allows the user to search by multiple criteria options. More than one criterion can be specified at a time.

Click *Start Search* after desired criteria have been selected to begin search.

Field	Description
Starting Search Date	Select the date for the search to begin with MM/DD/YYYY. Leave blank to search all.
Open Work Orders	Place a check mark in the field to display only open work orders.
Operation Code	Select the applicable operation code. Leave blank to search all.
Item #	Select an item number. Leave blank to search all items.
Must Be Exact Match	Check this box to ensure that your search is an exact match to the item number selected. This could limit your search in some situations and if unsure of exactly what the item number is, leave it blank.
Note: Only one of the (4) checkboxes below can be checked and one must be checked for the search to complete. A sample of what each checkbox produces from the search results is below.	
Labor/Outside	Select checkbox to display labor work orders.
Material	Select checkbox material work orders.
Components	Select checkbox component work orders.
Master	Select checkbox for the work order master form.
Repair Type	Select a repair type to narrow the search. For example if you're interested in looking only at inspection, select 'I' for inspections from the drop-down list. Leave blank to search all.

The following message displays if **one** of the above required selections is missing.
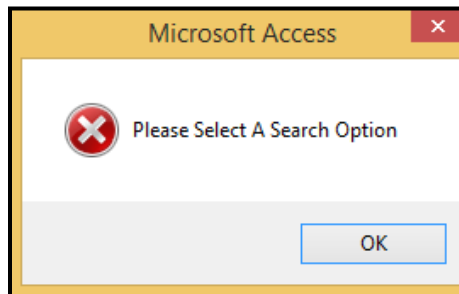
Asset Management Module

Samples of search display:

Search list displayed when **Labor\Outside** option is checked.

Place the cursor in a field that you wish to search. In this case the search is being conducted on the vend #. Next click the **binoculars** to search for the vend #. The following form displays.

Asset Management Module
Search list displayed when *Master* option is checked.

Double click on a *Work Order number* on the list to bring up more detail on the work order selected as seen below.
Click the *Notes* button to view notes created.

If no notes exist the following message displays:
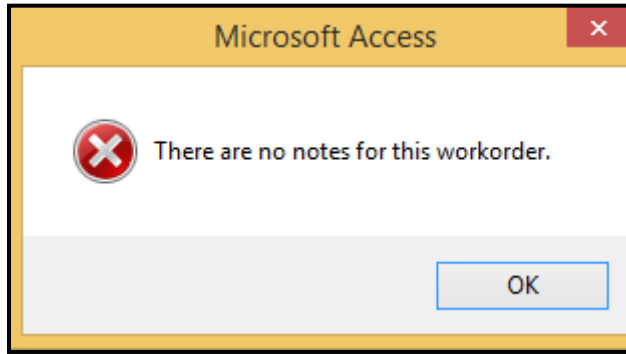
Location

Click *Location* to track the location specific to street address, longitude/latitude or custom location code created by the user. Also track starting and ending points for linear assets such a light rail track, street guard rails etc. The location option also ties into Fleet-Net's Public Schedule module in order to associate a stop id to the asset.

Field Name	Max Field Size	Field Type	Description
Asset Name	50	Alpha-Numeric	Enter in an asset name if other than the master asset name
Asset Location	50	Alpha-Numeric	Enter a user defined location such as which building the asset in housed in or which facility if multiply ones exist.
Street Address	50	Alpha-Numeric	Enter the street address
City			Select the City from the drop-down list
State			Select the State from the drop-down list
Zip	10		Enter the Zip Code
County	25	Alpha-Numeric	Enter the County
GPS Latitude		Number	If the asset is a stop or a shelter many times the GPS location of the asset is identified via AVL products. Enter the latitude coordinate.
GPS Longitude		Number	If the asset is a stop or a shelter many times the GPS location of the asset is identified via AVL products. Enter the longitude coordinate.
Township	10	Alpha-Numeric	Enter the township, if applicable
Range	10	Alpha-Numeric	The following information can be found within the Plat book for assets such as buildings and structures. Enter the range.
Section	10	Alpha-Numeric	The following information can be found within the Plat book for assets such as buildings and structures. Enter the section.
Location Code	10	Alpha-Numeric	User can create a custom location code. In the example above 01-01-100 the first two characters identify which facility the asset if located (main facility) the second group of numbers identify which building and the third set which specific office or bay the asset is in.
Linear Asset		Yes/No	Check this box to identify linear assets such a light rail track etc.
Length	20	Number	Enter the length of the asset. Consider the Unit of Measure in the next field.
Unit of Measure	2	Alpha-Numeric	Select the applicable unit of measure from the drop-down list
Starting Point Description	50	Alpha-Numeric	Enter a starting point description such as intersection of 5th and Main or enter a GPS location.
Ending Point Description	50	Alpha-Numeric	Enter an ending point description such as intersection of 5th and Main or enter a GPS location.
Security Card		Yes/No	Check this box if a security card is required to access the selected asset.
Key Required		Yes/No	Check this box if a key is required to access the selected asset.
Security Code Required		Yes/No	Check this box if a security code is required to access the selected asset.
Stop Id	8	Alpha-Numeric	If Fleet-Net's Public Schedules module is being used an association between the Public Schedule stop ID and the asset can be made. Click the drop-down option to select a stop ID. If the stop ID is not known use the red question mark option to search the stop by name. Once a stop ID has been selected click the green checkmark to access the Public Schedule module for the tracking of stop amenities and specific location.

Click the **green checkmark** under Bus Stop Information and stop Id to view the public schedules form which identifies stop amenities and location information.

Certifications

Click **Certifications** to track certifications of an asset including email alerts sent informing those in charge of certification renewal.

Use the green checkmark to create a Document Code titled Certifications if one does not exist. Choose the certifications options from the list.

Asset Management Module
The following form displays:

Field Name	Max Field Size	Field Type	Description
Reference	20	Alpha-Numeric	Enter a unique reference number
Description	50	Alpha-Numeric	Enter a description of the certification.
Effective Date		Date	Enter the effective date of the certification
Expiration Date		Date	Enter the expiration date of the certification. Once a certificate has reached its expiration date the system will allow the user to create an alert via Asset Alerts option everyday if needed otherwise any subsequent emails before the expiration date will be controlled by the Alert Days field.
Inactive		Yes/No	Once the certification has expired, check this box. Once a certification has been flagged as inactive it will no longer appear in the Asset Alerts option therefore email alerts will no longer be created.
Days Until Expiration		Alpha-Numeric	Auto-generated by the system. Number of days is calculated as days past the Expiration Date. If the expiration date has already passed the system will show the days as a negative number of days overdue.
Alert Days	3	Number	Enter in the number of days that the alert should be sent out before the expiration date. In the example above 90 days before 09/30/2013 an asset alert will be generated.
Last Alert Date		Date	Automatically updated by the system with the date the last alert was generated via the Asset Alerts option.
Alert Message	255	Alpha-Numeric	Enter the email message that will be generated by the system.
Alert Recurrence Days	3	Number	Once Days Until Expiration equals Alert Days the system will generate an email. The Alert Recurrence Days field allows the user to enter the number of days after the initial email was sent out that a follow-up email will be sent. In the above example it has been set to two. For example, the first alert would have gone out 7/2/2013 which is 90 days from the expiration date of 9/30/2013. If the user generated alerts the next day on 7/3/2013 no alert would have gone out again but since the Alert Recurrence Days is set to 2 on 7/4/2013 another alert would be generated.
Notification Group			Select the applicable notification group from the drop-down list
Date Obtained		Date	Enter the initial or recertification date for the asset.
Created			Automatically updated by the system with the User, Date/Time and the form from which the certificate record was initially created.
Updated			Automatically updated by the system with the User, Date/Time and the form from which the certificate record was updated.

Picture

Click *Picture* to save an image of the asset. Unlike the Notes option only one image can be saved.

Field Name	Description
Image Files	Select the applicable image from the drop-down list. Images must first be saved into the Windows folder that was specified within the Image Path Setup form mentioned earlier in the setup portion of the manual. (Note: If the image file name does not appear in the drop-down list, yet it does reside in the Windows folder then proceed to the Image Path Setup form and click the *Image Files* button for the applicable asset type and class to update the list.)
Asset Image File	Once the image is saved by clicking the Save button the image file name will automatically populate.

Save
Select an image from the Image Files drop-down option. The image will display on the right hand side of the screen. If the correct image was selected click the Save button and the image will then also be displayed on the left hand side and the image file name will be saved in the Asset Image File field,

Clear
Select Clear to erase the image from the temporary image display section on the right. It does not erase the image from save mode.

Mode
Toggle the Mode option to see the image in either stretch, zoom or clip options. The mode the image is in when the Save option is selected is the mode it will be stored in.

Delete
The Delete option will completely delete the images from both the left and right side but will not delete the image from the folder in which it is stored.

Enlarge
Displays the image on the Temporary Image side in enlarged format.

Clone

Click *Clone* to clone an asset. The feature is very practical when multiple like assets have been received.
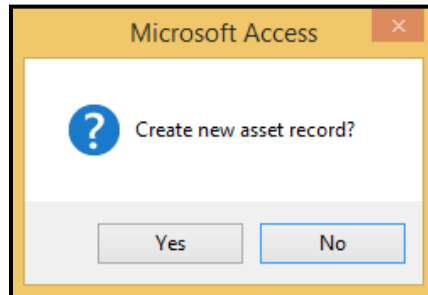
For example if 5 new HVAC were received the first one is setup up within Asset Maintenance and then the remaining 4 can be setup using the Clone feature. Select the asset that is to be copied (source asset) at the top of the form and then enter the asset number for the new asset in the New Asset # field below.

Cloning will replicate all fields from the Master form source asset to the target asset with the exception of the following fields: Serial #, Installed on Asset Type, Installed on Asset #, Sub Asset, Asset is Inactive, Out of Service and Cleaned related fields.

Cloning will also replicate most data found within *Warranty, Inspection, Overhauls* (*only Life Cycle Condition, Life Expectancy Months*), *Purchasing, Location* and *Picture.*

Click **Start** the following form displays:

Click **yes** to proceed with copy or **No** to cancel.
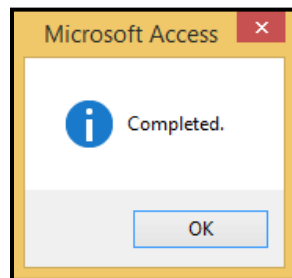
Click **OK** on the confirmation message.

Renumber

Click *Renumber* to renumber an asset; the following form displays:

Enter the new asset number; click *Start* the following confirmation message displays:
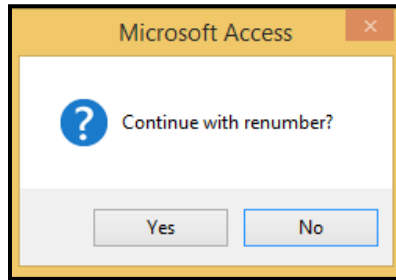
Click *yes* to continue, *No* to cancel; the following confirmation message displays. Click *OK*.
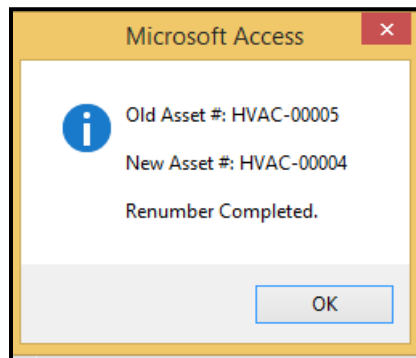
Asset Inquiry

Allows for viewing of Asset information but does not allow for changes. Many of the same button options found within Manage Assets are included in Asset Inquiry.
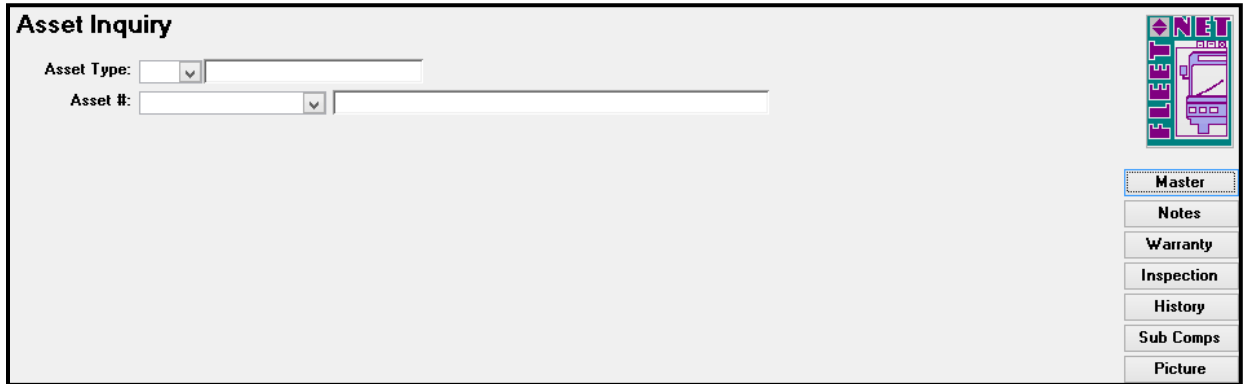
Select the *Asset Type* and **Asset #** from the drop-down list.
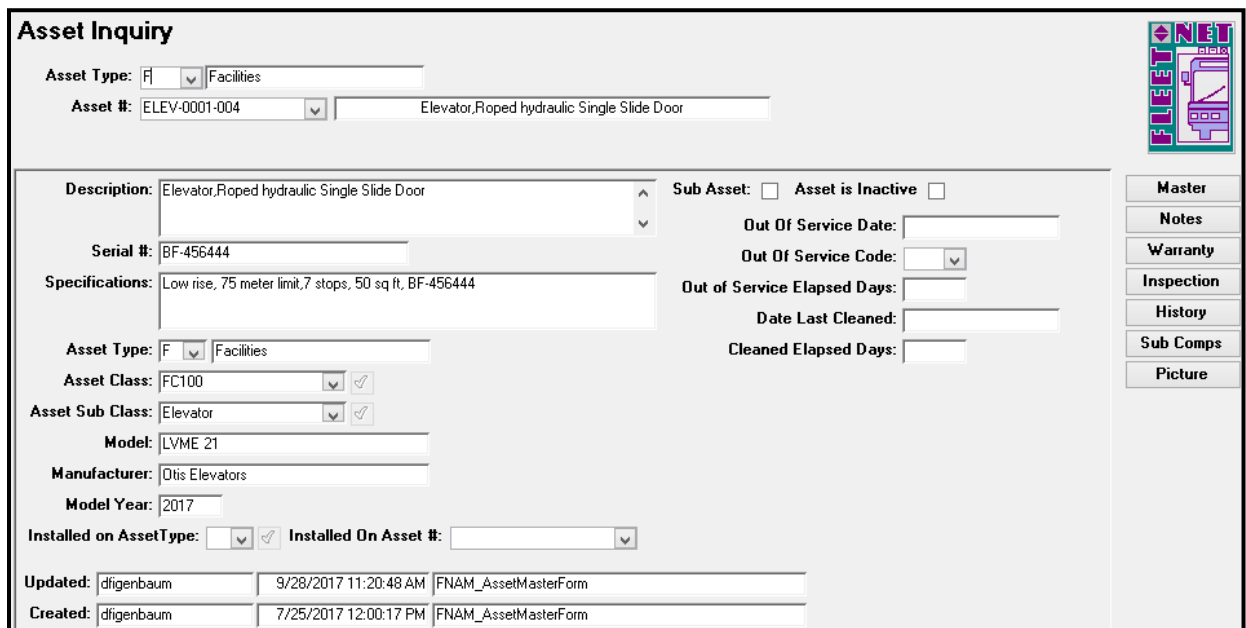
The Notes button option will allow the user to view existing notes as well as create new ones.
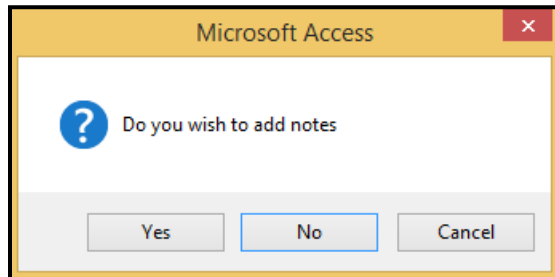
Clicking **No** will display the existing notes; they cannot be altered. It is suggested to click No first to see which reference numbers have already been setup. Using the same reference as one that already exists will result in an error.

Clicking **yes** will display this form. Use the drop-down to select the Document Code.

Enter a unique reference for each Document Code type.

User Defined Data Entry

This form allows users that are not granted security access to the Asset Maintenance option to enter and maintain data entered into the user created data forms.

User will select the Form Name from the drop-down.

Enter the Asset Type and Asset Number

Click Enter to complete the fields.
Double click on the field data to display history to changes made to data. All entries for this selected field will display

Click *Print* button to display report of all field changes.

The confirmation message displays click *Yes* to continue, *No* to cancel

The following report displays:

Useful Life Reporting

The Useful Life Report includes many of the fields found in the Condition button found in the Asset Maintenance Form.

This report is a useful tool for determining the replacement date and the percentage of useful life in either miles, hours or months remaining of each asset.

An *Asset Type* must be selected from the drop-down. The remaining fields Asset Class, Asset Sub Class and Asset Number can be left blank to report on all assets or select choices from the drop-down lists to narrow the reporting selection.

Click the *sort check box option* to select which assets will be selected: By *Month, Miles or Hours*. Only one sort criteria can be selected at a time. If no assets have been setup based on the sort criteria selected no assets will be listed.

The Months Remaining: or Miles Remaining: or Hours Remaining: field must be filled in. If 12 is entered in the Months Remaining field, then all assets that have 1-12 months left on their useful life will populate the display. If an asset has 13 months remaining on its useful life, it will NOT populate on the display.

Note: if the Months Remaining: or Miles Remaining: or Hours Remaining: field (depending on which Asset Type was chosen) is left blank, the only assets that will populate the display are those whose useful life is passed, as in the example below. This was run in 11/2014 with the Months Remaining: field as a blank. The asset that came up ended its useful life on 3/1/2014. Once an asset is past its useful life, it should be checked Inactive on the Asset Master screen.

Display

Select *Display* to view the data on the screen.

Print

Select *Print* to view the report in a report format and/or print the report.

The following prompt will displays:
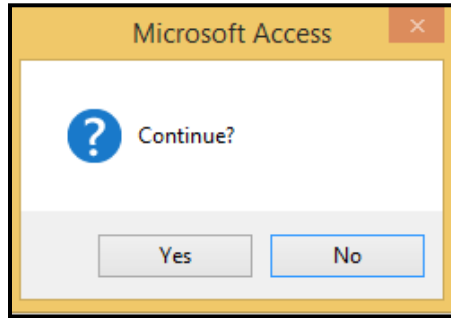
Click *Yes* to continue and *No* to cancel.

Asset Inspections/Campaigns

Inspection Planning allows the user to implement scheduled Preventive Maintenance. The forms listed below will first explain the initial setup of the inspection types, cycles and then the overall use of the entire inspection planning cycle.

Modify/Add PM Types

Select *Modify/Add PM Types* to define the Preventive Maintenance (PM) limits by Miles, Hours and/or Days and specify the Work Order Classification Codes by inspection type.

Select the Inspection ID from the drop-down list. Inspection Types previously setup will be displayed.
New Inspection ID's can be created via the green checkmark.

In the screenshot above the 'Forecast' vs. 'Actual' fields will provide a cushion of 5 days or 10 days. When the days since the last inspection reaches the forecast days, Inspection Due will print on the Inspection Forecast Report. Note that the 6 month is also 25 and 30. This is because it will occur 30 days after the inspection for Month 5 occurs. See the Cycle below

Field Name	Max Field Size	Field Type	Description
Type	8	Alpha-Numeric	Enter a Type of Inspection. For example, a PM Type Setup is: 6M = 6 month, 12M=12 month, 36M = 36 month.
Description	40	Alpha-Numeric	Enter a description of the Inspection Type
Class Code			Select the applicable Work Order class code from the drop-down list. The class code determines the general ledger accounts that will be used for Material, Labor and Overhead Costs. It also determines if the Inspection will be reset when the work order is opened and updated or when it is closed and updated.
Forecast Miles/Hours/Days	20	Number	Enter the number of miles, hours or days prior to when the Actual Inspection is due that this inspection should be included on the Inspection Forecast Report.
Actual Miles/Hours/Days	20	Number	Enter the number of miles, hours or days that the Actual Inspection is due.

Modify/Add PM Cycles

Use Modify/Add PM Cycles to select the order to perform each inspection type.

In the example on the previous page, inspection types M, 6M and 12M were setup. Within each one of the types different tasks are performed. For example, on the M inspection certain tasks are performed, on the 6M the same tasks from type M may be performed plus additional tasks. The tasks from M do not necessarily have to be repeated in a 6M this is all dependent on the care and maintenance manual that came with the asset.
Modify/Add PM Cycles allows for the user to define the sequence that the tasks will be performed.

Select the Inspection ID from the drop-down list. All assets within a particular Inspection ID will have the same inspections tasks performed. For this reason it is important to have only like assets within an Inspection ID.

Field Name	Max Field Size	Field Type	Description
Number	8	Number	Enter the numeric order in which to perform the inspections.
Type			Select the 'Type' of inspection to be performed in the specific order listed.
Start Over		Yes/No	Check this box to indicate that after this inspection, the cycle should begin at the first inspection.

Modify/Add PM Checklist Items

Use this form to create a detailed list of the tasks that will be performed on the asset during the inspection. Once the user has selected the Inspection ID a Type must also be selected before the tasks can be entered.

Select the *Inspection ID* to be setup, added and/or modified.

Select the *Type* of inspection to be performed.

Field Name	Max Field Size	Field Type	Description
Item #	4	Alpha-Numeric	This field is the field that controls the order in which the tasks will appear on the hardcopy of the Work Order inspection. See suggested numbering below.
Type	255	Alpha-Numeric	Enter a description of the task that will be performed with the Item selected. Example: Replace overhead light bulb
Attachment			Right click in the field to attach documentation that applies to the appropriate Inspection Description. Such attachments could be schematics, a document with repair/replacement instructions for specific parts etc. Note: attachments do NOT print out anywhere.

Some consideration should be used prior to entering Checklist Items due to the manner that the fields sort. If the Item numbers are entered as 1, 2, 3, etc. they will display as 1, 10, 11, etc.

It is suggested that the user allow for gaps between numbers for future expansion and include leading zeros as shown below:

Suggestion: (The first two digits indicate what sub system of the asset being worked on).
01.01
02.01

Print: Generates a report of the checklist items. Review the sort order.

Inspection Checklist Items
Inspection Id: EL
Type: EL01

Item Number	Description
01.01	+++ Monthly Cleaning+++
01.02	Check all wiring, cables and connectors
01.03	Check operation and emergency shut down mechanism
01.04	Check for fluid leaks, signs of damage or worn parts
01.05	Check the operation of the mechanical safety lock and clean
01.06	Check hydraulic fluid level, replenish if necessary
01.07	Clean entire body from dirt and grime

Copy: Allows for easy duplication of an entire checklist from one Inspection type to another.

FNVM_InspectionCopyCh...

Copy Checklist

Target Inspection Id:
Target Type:
Start
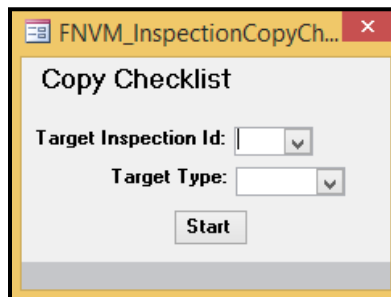
Field	Description
Target Inspection ID	Select the Target Inspection ID (where the records will be copied to) from the drop-down list.
Target Type	Select the Target Type (where the records will be copied to) from the drop-down list.
Start	Click to copy records from the Source Inspection ID and Type to the Target Inspection ID and Type.

Modify/Add PM Parts List

Use the *Modify/Add PM Parts* List to provide a list on the inspection Work Order, which will assist the parts clerk in knowing which standard parts are used on the particular inspection type.

This does not affect inventory levels in any way. Inventory levels will be affected from the parts issued either via barcode unit or manual entry into the Work Order system. Parts not kept in inventory can also be entered by leaving the Part Number field blank and entering the item description into the description field.

Field Name	Max Field Size	Field Type	Description
Line			Auto-populates when the Part Number is selected
Part Number			Select the Inventory Part Number from the drop-down list
Quantity Needed	8	Number	Enter the quantity of this part required for the selected inspection
UOM			Auto-populates based on the Part Number selected
Description			Auto-populates based on the Part Number selected
Bin/Warehouse			Select the Bin and Warehouse location of the part

Once the inspection setup is complete the inspection must then be assigned to each asset. For more information refer to the Asset Maintenance (Inspections) section of this manual.

Inspection Forecast List

This form generates a list of all of the assets that have an inspection assigned in the in order of urgency. This is a vital tool in scheduling the assets that need to come in for inspections.

The only required field on this form is Asset Type. The Asset Class and Asset Sub Class can be left blank to include all assets within the Asset Type selected.

Select one of the Sort criteria from the check boxes: Miles, Hours or Days remaining. Only one can be selected at a time.

Click the **Display or Print button**, the following confirmation message displays:

Microsoft Access

? Asset Inspections.
Report will be sorted by miles remaining.

Continue?

Yes   No
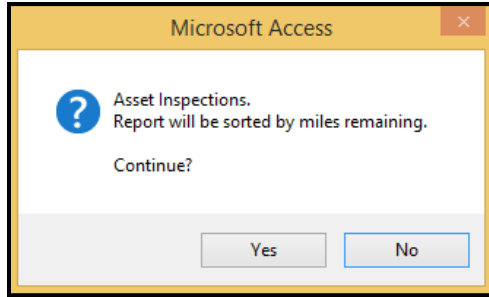
The example of the forecast in the display format is shown below. The horizontal scroll bar at the bottom of the form can be used to view the remaining fields on the form.

In the example below the assets with the least days remaining display first. If the Inspection Work Order has been generated the Work Order number will be displayed in the Assigned Work Order Field.

Warnings display for inspection that are due based on forecast and past due based on actual miles setup via Inspection Types.

Inspection Reporting

Asset Type: B ∨ Buildings
Asset Class: ∨ Asset Sub Class: ∨

☑ Sort by miles remaining
☐ Sort by hours remaining
☐ Sort by days remaining

STOP

Display
Print

Asset #	Insp Id	Insp #	Type	Description	Last Done	Assigned Work Order	Mileage Warning	Miles Due	Mileage Limit
12345			Installed On: B-000001						
	EL	1	EL01	Monthly Inspection	07/27/2017	3B00000003			
23456			Installed On: B-000002						
	EL	1	EL01	Monthly Inspection	07/27/2017	3B00000004			
34567			Installed On: B-000003						
	EL	1	EL01	Monthly Inspection	07/27/2017	3B00000005			

Inspection Reporting

Asset Type: B ∨ Buildings
Asset Class: ∨ Asset Sub Class: ∨

☑ Sort by miles remaining
☐ Sort by hours remaining
☐ Sort by days remaining

STOP

Display
Print

Assigned Work Order	Mileage Warning	Miles Due	Mileage Limit	Miles Since	Miles Remaining	Days Warning	Days Due	Days Limit	Days Since	Days Remain
3B00000003				0	0	Inspection Past Due (Late)	30	25	67	-37
3B00000004				0	0	Inspection Past Due (Late)	30	25	67	-37
3B00000005				0	0	Inspection Past Due (Late)	30	25	67	-37

The *Print* option displays the Inspection Forecast Report as shown below:

Inspection Forecast - Assets

Asset #	Insp Id	Insp #	Insp Type	Description	Warning Message	Last Inspection	Actual	Forecast	Remaining
12345				Installed On: B-000001					
	EL	1	EL01	Monthly Inspection	Miles:	0			0
				Date Last Inspected: 7/27/2017	Hours	0			0
				Assigned Work Order: 3B00000003	Days: Inspection Past Due (Late)	67	30	25	-37
23456				Installed On: B-000002					
	EL	1	EL01	Monthly Inspection	Miles:	0			0
				Date Last Inspected: 7/27/2017	Hours	0			0
				Assigned Work Order: 3B00000004	Days: Inspection Past Due (Late)	67	30	25	-37
34567				Installed On: B-000003					
	EL	1	EL01	Monthly Inspection	Miles:	0			0
				Date Last Inspected: 7/27/2017	Hours	0			0
				Assigned Work Order: 3B00000005	Days: Inspection Past Due (Late)	67	30	25	-37
CONDHVAC-000001				Installed On: HVAC-00001					
	AC1	1	1	Yearly Maintenance	Miles:	0			0
				Date Last Inspected: 7/28/2017	Hours	0			0
				Assigned Work Order:	Days:	66	365	335	299
HVAC-00001				Installed On: B-000001					
	AC	1	06M	6 Month Inspection	Miles:	0			0
				Date Last Inspected: 7/27/2017	Hours	0			0
				Assigned Work Order:	Days:	67	180	165	113
HVAC-00002				Installed On: B-000002					
	AC	1	06M	6 Month Inspection	Miles:	0			0
				Date Last Inspected: 7/28/2017	Hours	0			0
				Assigned Work Order:	Days:	66	180	165	114

PM Checklist

Use this form to generate inspection related work orders, including parts lists and/or inspection items for all or specific assets designated.

Each section is defined below with field descriptions and options for generating inspection reports for your specific requirements.

Field Name	Description
Location	Select the location where Inspection will be performed. This is required to generate the Work Order. The location code becomes the first character of the work order number.
Asset Type	Select the asset type. This is required to generate the Work Order. The asset type becomes the second character of the work order number.
Generate Work Orders	Select to create a new Work Order for assets with inspections that are due. The Work Orders will be available for assignment immediately in the Work Order module. (This field is optional and if left unchecked Work Orders will not be generated.)
Include Parts Lists	If selected the parts list on Report/Work Order.
Include Inspection Items	If selected the checklist tasks will print on the PM Checklist.
All Inspections or Inspection ID	Select the checkbox if all inspections are required, or select an individual Inspection ID.
All Assets	Check only if a Work Order is to be created for all assets. *Note: Use this option with caution.*
Sort by…	Choices are available for sorting your PM report. Sort by either Miles Remaining, Hours Remaining or Days Remaining. Enter an amount in the respective Due Within field if desired.
Asset Class	If All Assets is not checked enter the particular Asset Class desired.
Asset Sub Class	The assets within the class selected above can be narrowed down even further by selecting a sub class but is not required.
Asset #	To generate or view a Work Order for only one specific asset select the asset number from the drop-down list.

Click the **Start** button to create/view the Work Orders.
The following prompt displays listing the selection criteria specified:
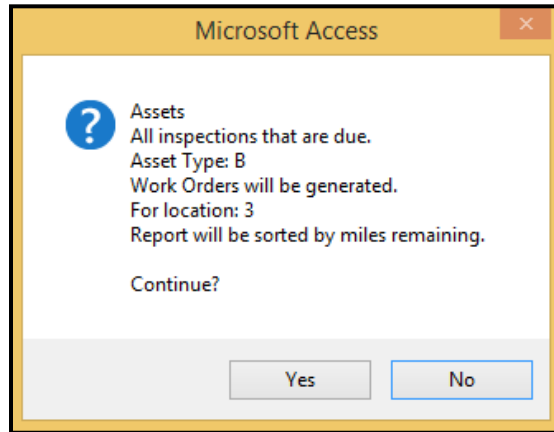
Review for accuracy. Click **Yes** to proceed or **No** to cancel.
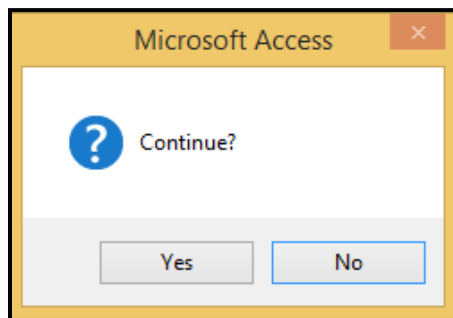
Campaign Entry

Use to generate Campaign Work Orders for all assets assigned to specific Asset Class and/or Asset Sub Class or a specific Asset.

Field	Description
Location	Select the location where Work Order Campaign will be performed. This is required to generate the Work Order. The location code becomes the first character of the work order
Asset Class **Asset Sub Class** **Asset #**	Select the Asset Class and Sub Class or specify one Component
Open Date **Time**	Click the calendar icon and the current date and time is populated or manually enter the date and time
Class Code	Select the applicable Class Code. The Class Code selected determines which GL journal entries are generated for material, labor, billing, and outside services.
Opened By	Select the employee number of the person generating the work order.
Repair Type	C – Campaign Maintenance
Problem	Enter or select from the drop-down list a problem code. (Optional)
Task Code	Select the applicable task code. The task code is used to calculate the estimated costs based on the material and operation code assigned to the task. (Optional)
Description	Enter the description of the work assignment.
Comments	Enter any additional comments.

Click *Start* to generate the Work Orders. The following prompt displays:

Click *Yes* to continue and *No* to cancel.

The following report displays:

When the report is reviewed and closed the following confirmation message displays:
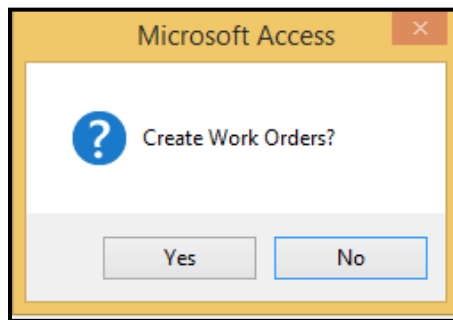
Click **yes** to continue, **No** to cancel.

The following confirmation message displays:
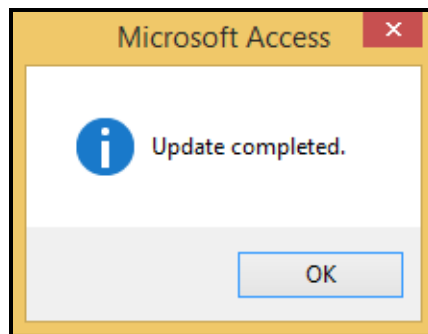
The following report displays with the work order numbers assigned:

Campaign Maintenance Report - Assets With Assigned Work Orders

Asset #	Asset Description	Work Order #

Location: 3   Asset Type: B   Asset Class: B100   Asset Sub Class: B100

Open Date: 10/2/2017   Time: 03:30 PM

Class Code: 1100   Buildings   Repair Type: C   Campaign Maintenance

Opened By: 1234   Smith John

Problem: EDOOR   ELEVATOR DOOR NOT OPENING

Task Code:

Description: Check door opening mechanism due to manufacturer recall   Comments:

Total Assets: 0

Incidents

The incidents cycle allows for assets needing attention to be taken care of by those designated to maintain the particular asset. Incident Entry allows for all Fleet-Net users to have the ability to report incidents, deficiencies or non-functioning assets. Within the Incident Management Entry form described later in the manual the user can also create a work order to address the issues reported about the asset.

Incident Entry

Incident Entry allows the users report issues found with assets and send email notifications to those responsible for maintaining the asset. The user can search the incidents database, revise previously created incidents, create new incidents, print incidents and also send email notifications to have someone address the problem.

Incident Entry

Incident #: [   ]

Search

Edit Incident

New Incident

Print Incident

Email Notifications

Click **Search** to view a list of all incidents in descending order by Incident number. Double click the incident number to view the details of the selected incident.

The list can also be sorted by any of the other columns by placing the cursor in the column, right click and select options.

Either enter an incident number directly into the Incident number field or use the **Search** button option outlined above to select an incident. This option allows the user to view or revise any of fields up until a Work Order number has been assigned to the incident. At that point revisions to the incident can no longer be made and the incident becomes view only.

Click **New Incident** to create a new incident and automatically assign an incident number.

Click **Yes** to proceed or **No** to cancel.

Asset Management Module

The following form displays:

Field Name	Max Field Size	Field Type	Description
Date Reported		Date/Time	Auto-populates with the current date and time the incident was created. The date and time can be revised by either clicking the calendar option or manually entering the revised date and time.
Date Resolved		Date/Time	Auto-populates once the work order assigned has been closed. The field cannot be edited.
Reported By	40	Alpha-Numeric	The user reporting the issue can enter their name or position.
Phone #	14	Number	Enter the phone number of the person reporting the issue
Extension	6	Alpha-Numeric	Enter the extension of the person reporting the issue, if applicable
Email Address	50	Alpha-Numeric	Enter the email address of the person reporting the issue
Problem Reported	255	Alpha-Numeric	Enter a description of the problem reported.
Asset Type			Select the Asset Type from the drop-down list.
Asset #			If the asset number is known, select if from the drop-down list. The user reporting the issue may not know what the asset number is therefore it is not a required field when reporting the incident. The asset number will need to be assigned before a work order can be. Once an asset number is selected the description will auto populate.
Problem Code			Select the problem code that best describes the issue with the asset. This field can be left blank.
Taken by Employee No			Select the employee number of the person recording the incident

Field Name	Max Field Size	Field Type	Description
Problem Resolution			The users responsible for maintaining the particular asset can select the applicable problem resolution code from the drop-down list.
Notification Group			Select the applicable notification group. Emails will be generated for all members of the group who are not flagged as inactive.
Work Order #			Auto populated once a work order is created via the Incident Management Entry form. The field cannot be edited.
Incident Cancelled		Yes/No	Check this box to flag the incident as cancelled.

Example of a newly created incident.

Click **Print Incident** to view/print the incident. The following prompt displays:

Click *Yes* to continue or *No* to cancel.

Incident Report

Incident #: 4

Date Reported: 10/3/2017 8:54 AM		Date Resolved:	☐ Incident Cancelled
Phone No / Ext: (123) 456-7891 123			
Reported By : HR Secretary		Email Address : LJohnson@1transit.com	
Problem Reported: Elevator door stuck			
Problem Code: EDOOR ELEVATOR DOOR NOT OPENING			
Taken By : 2345 Lisa Johnson			
Asset Type: B Buildings			
Asset #: 34567 Elevator#3, 10 passenger			
Problem Resolution: P Pending			
Notification Group: Safety Safety			Work Order #:
Created By : dfigenbaum	10/3/2017 8:54:01 AM	FNAM_IncidentEntryForm	
Updated By: dfigenbaum	10/3/2017 8:54:01 AM	FNAM_IncidentEntryForm	

Email Notifications

Click *Email Notifications* to generate emails to the contacts assigned to the Notification Group that was assigned to the incident as well as the person reporting the issue assuming an email address was entered into the Email Address field within the Incident form.

Microsoft Access

? Do you wish to send email notifications?

Yes   No
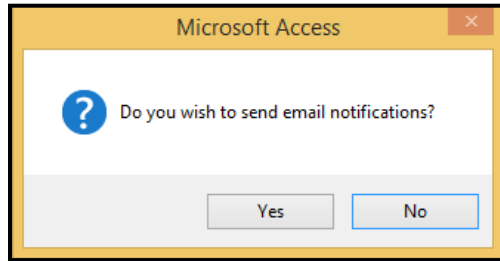
Click *Yes* to send emails or *No* to cancel.

Microsoft Access

ℹ Email notifications sent.

OK
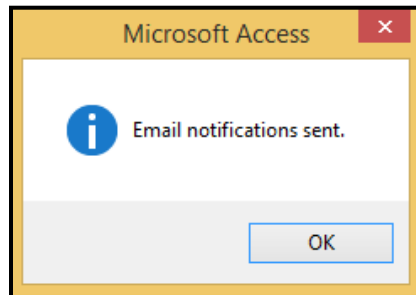
Click *Ok* on the confirmation message

Below is an example of the email sent to the users assigned to the Notification Group that are responsible for addressing the incident
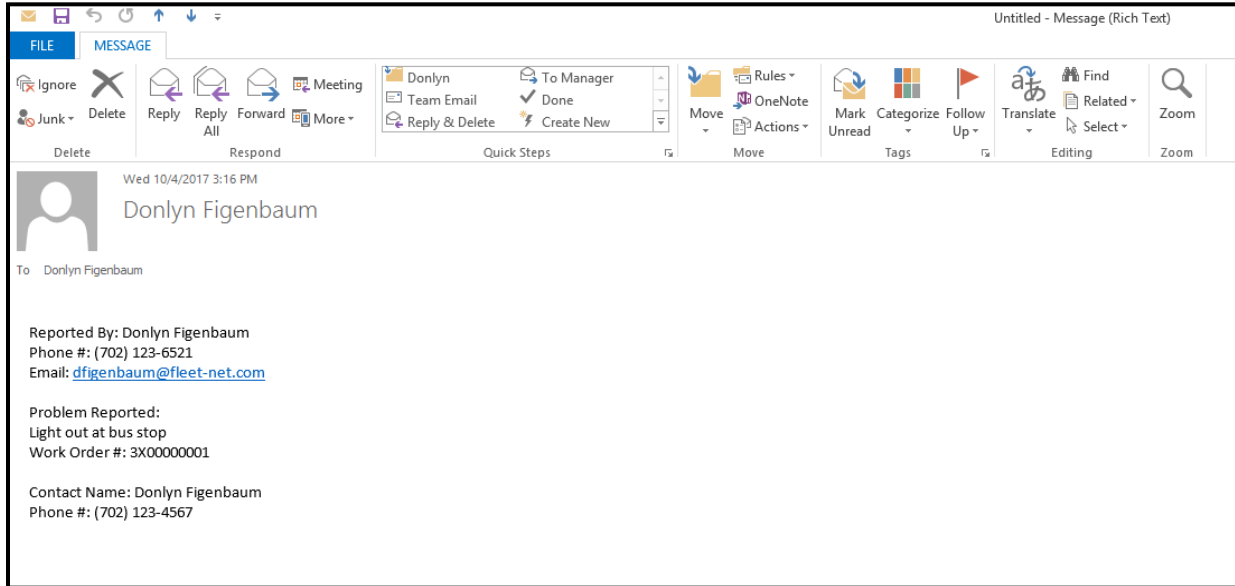
Incident Management Entry

The button options available within the Incident Management Entry are the same as the ones found within Incident Entry. The only exception is the Create Work Order button option which will be explained here but for functionality of the other button options please refer to the Incident Entry portion of the manual above. You can only cancel an incident while in incident management entry.
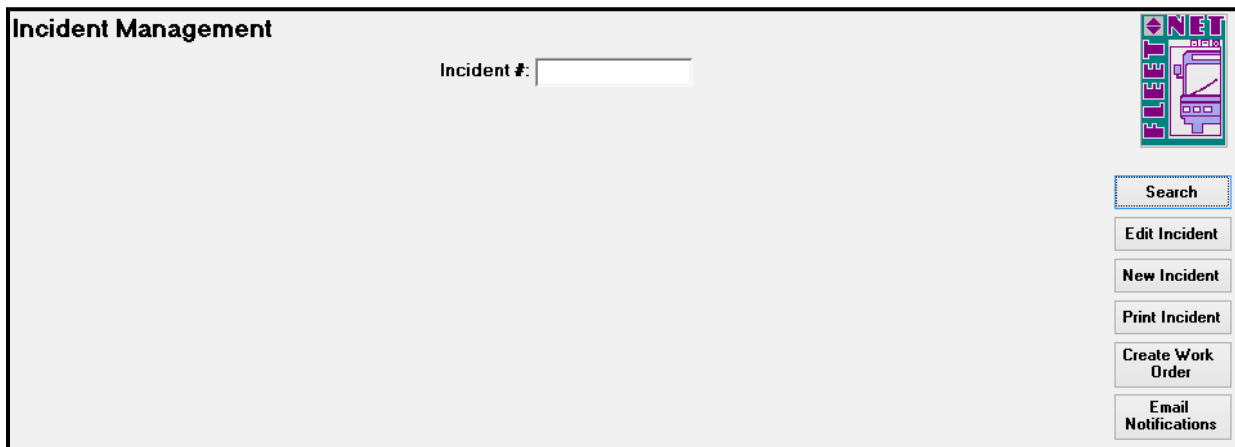
Create Work Order

This option will allow the user to view existing work orders or create a new work order for the asset which can be accessed via the Work Order Entry form within the Work Order module for the incident specified.

Field Name	Description
Incident #	Enter the incident or use the Search button option to pick an incident from the list.
Asset Type	The Asset Type will automatically populate once the incident number is selected with the asset type that is associated to the asset which was assigned to the incident.
Asset #	The Asset number will automatically populate once the incident number is selected with the Asset number that is associated with the incident.
Location	Select a Location from the drop-down list. The location code becomes the first character of the work order number that is generated. The combination of Location Code and Asset Type determines what next sequential number is assigned to the work order.
Repair Type	Select the repair type that best fits the type of work to be done from the drop-down list.
Opened By	Select the user ID of the person opening the work order from the drop-down list.
Out of Service	This is an optional field. By entering a date in this field it will update the Out of Service field on the asset master found in the Asset Maintenance form. Users will be able to determine if the asset is functional/available or Out of Service. The number of days Out of Service Elapsed Days will also be updated once this field is populated and updated.
Task Code	Assign a Task Code or leave blank. By assigning a task code it can be compared against the personnel list to see who is skilled in making such a repair.
Vandalism	Check this box to flag the incident as vandalism.

Once the information has been completed, click the **Create Work Order** button on the left to create a new work order for the incident.

If an open work order exists for the asset and is of the same Repair Type, the following message displays:
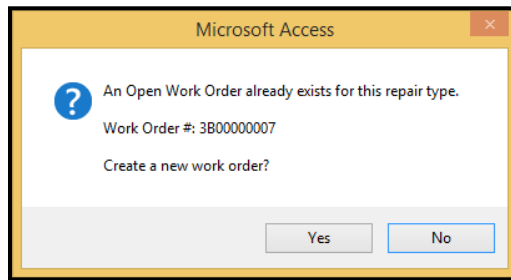
The purpose of the prompt is to alert the user of a possible duplicate work order that may be created because another user already created the incident work order through the work order entry form. If it is determined that another work order should be created of the same repair type click *Yes* to continue and *No* to cancel.

The following confirmation message displays:
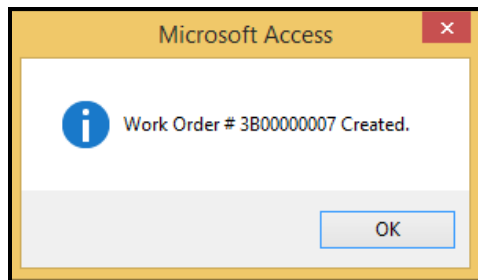
Once created, the work order can be viewed and managed via the **Work Order Entry form**. If a problem code was not assigned to the incident then the Class Code must be manually assigned once the work order is created.

View Open Work Orders

Click **View Open Work Orders** to view a list of all open work orders for the asset assigned to the selected incident. To view work orders for a different asset the Incident number must be changed to one that contains the other asset. Work orders will display on the list.

Double click a work order # to display information.

Incident Cancelled

You can only cancel an incident while in Incident Management Entry

Checking the Incident Cancelled box will result in the following confirmation message:
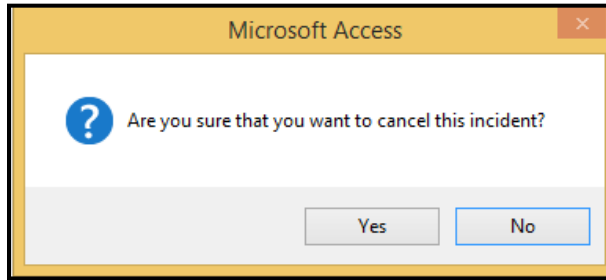
Select **yes** to cancel and **no** to cancel. Selecting **yes** will flag the incident as cancelled when viewing the incidents via the Search button option.

Asset Alerts

Certification Alerts displays, prints and emails alerts informing users when aspects of assets are up for recertification.

Select an Asset Type from the drop-down list. To narrow down the selection criteria an Asset Class and Asset Sub Class can also be selected but are not required.
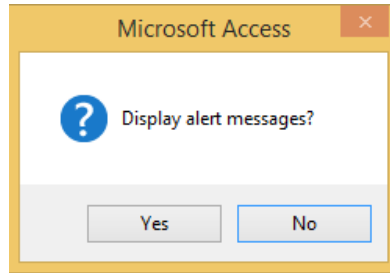
Display Alerts

Click the *Display Alerts* button to display the assets that have a certification deadline coming up. The following prompt displays:

Click *Yes* to proceed and *No* to cancel.

The display will list the Document Type, Reference Number, Expiration Date and the Alert Message. In the example below only one asset meet the criteria for the Asset Type and Asset Class selected and had a certification due.

Print Alerts

Click **Print Alerts** to print the assets that have a certification deadline coming up. The following prompt displays:

Click *Yes* to proceed and *No* to cancel.

The report will list the Reference Number, Expiration Date and the Alert Message. In the example below only one asset meet the criteria for the Asset Type and Asset Class selected and had a certification due.
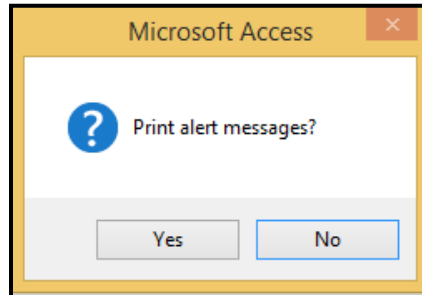
Asset Certification Alert Message Report

| Asset #	Document Type	Reference #	Expiration Date	Message
12345	Certification	123	11/1/2017	12345 Elevator #1 Located at front of the building Asset # 12345 Expiration Date: 11/1/2017 expires in 28 days. Safety Inspection Certification

Send Alerts

Click **Send Alerts** to generate emails to the users within the Notification Group. The following prompt displays:
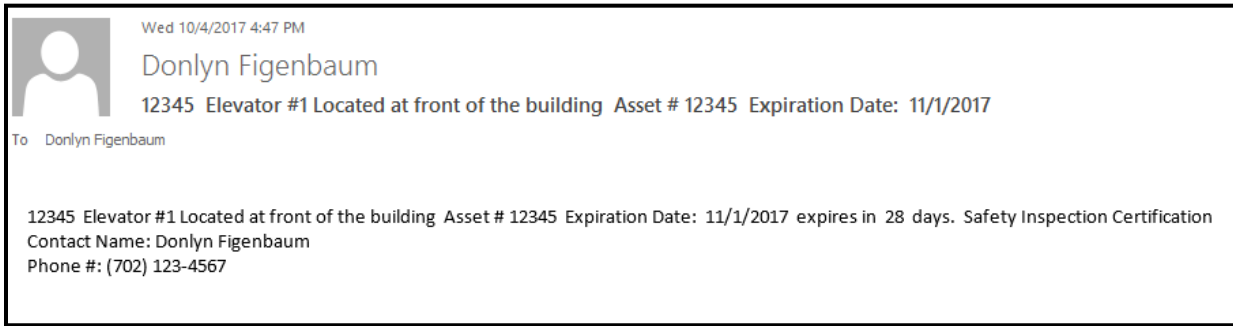
Click **Yes** to proceed and **No** to cancel.

The following confirmation message displays:
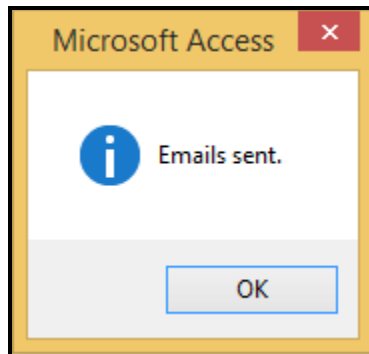
Below is a sample of the email generated to alert the user about the recertification.

The illustration below shows the Certification data in the Asset Master. The record was setup to alert the users in the 'Buildings" notification group to contact the elevator safety inspector for the annual inspection and recertification. Since the Alert Days is greater than the Days until Expiration an email alert will be generated.