

Building Asset System



Management Planning Systems

MPS

Building Asset System

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Contents

Description.....	1
Installing the Asset System.....	2
Using the Database.....	2
Initial Data Input.....	4
Vendor Data Input.....	4
Facilities Files.....	8
Equipment Class.....	10
Asset Data.....	11
Reports.....	15
File System.....	18
Find Function.....	19
Sort Function.....	22

How to Use the Building Asset System

Description

Stand Alone System

This Building Asset System is an integrated system containing purchasing and nameplate information for all buildings, building equipment, small tools, and rolling stock owned and used by an organization. The system contains specific screens and fields for all of the typical components found in any structure system. Included in the system is the capability to produce a depreciation schedule for each item entered into the system thus providing key information needed in order to comply with the fixed assets management process described in statement No. 34 of the Governmental Accounting Standards Board.

FileMaker Solution

This Building Asset System is a shareware product produced using FileMaker Pro. Products developed with FileMaker Pro are called solutions.

Function

This solution was designed to provide a single location to maintain all purchasing, name plate data life expectancy, and remaining value for all building assets owned and operated by an organization.

Copyright

The Building Asset System was developed by Management Planning Systems of Eugene, Oregon, who own the rights to the system. The files may be copied and used for up to 30 days on a trial bases a demo to determine if you would like to purchase this system. However, the system may not be routinely used without the written permission of Management Planning Systems. The system is distributed and used in accord with the standard MPS Software License as shareware for \$29.95.

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Installing the Asset System

Be Familiar with FileMaker

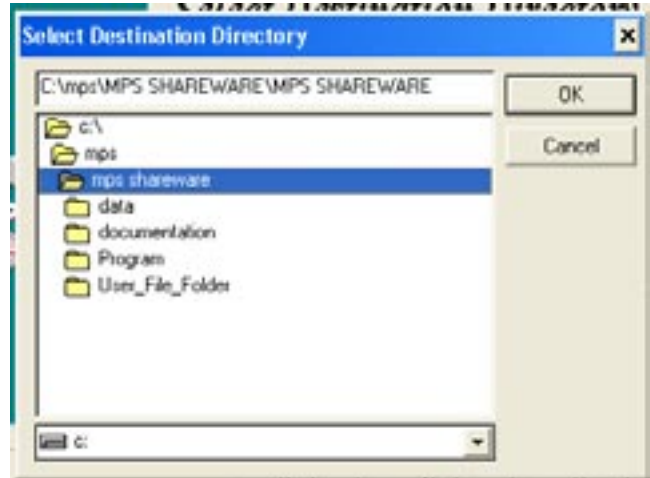
To be effective with the use of this data base the user should be familiar with functions of FileMaker Pro.

Install

The program is installed following the install procedure found in the How to Install.pdf document on the CD.

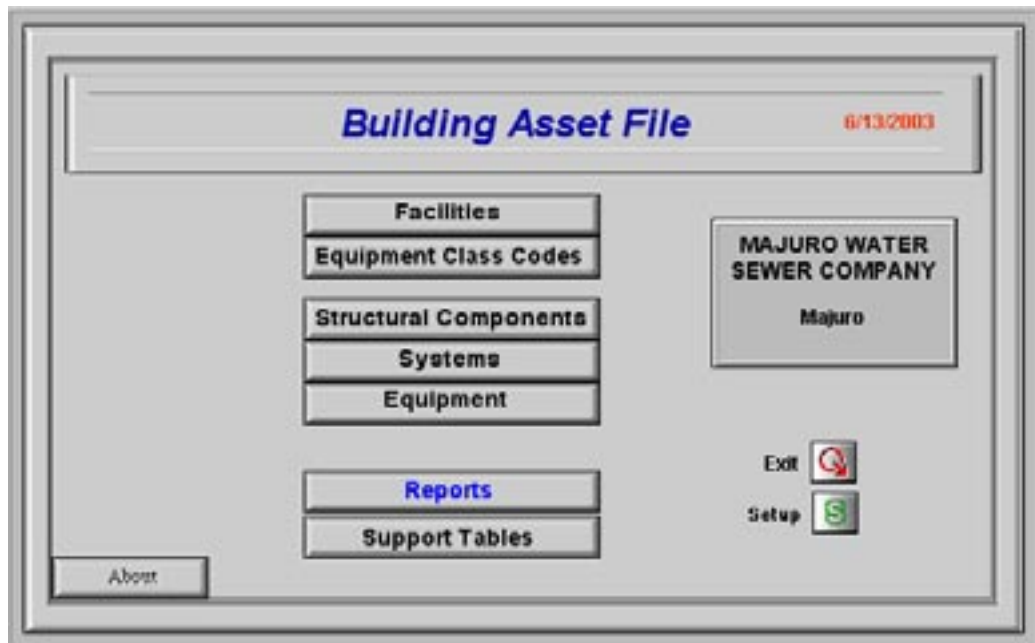
Files and Folders

The install places a folder on the computer titled mps. Inside this folder are four additional folders. The data files are placed inside of the data folder. A copy of this manual is placed in the Documentation folder.



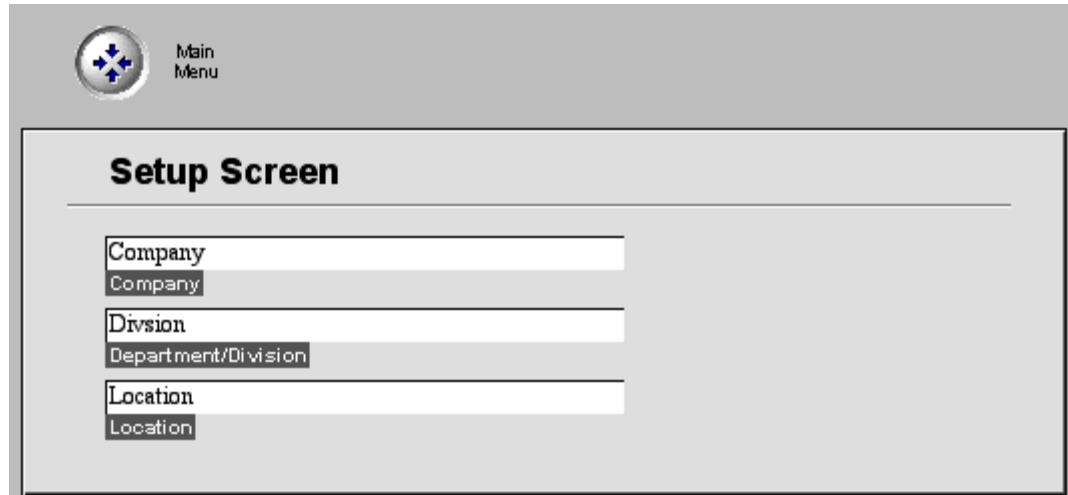
Start the Program

The Building Asset System program may be opened from the Start Menu. Go to MPS Shareware. If Building Assets is the only program installed the screen below will appear. If more than one shareware program has been installed the Launch Utility screen will appear, select Building Assets and the screen below will appear.



Personalize

The organizations name can be changed by going to the Setup screen and typing in the appropriate name and division.



The screenshot shows a software interface with a grey header bar. On the left of the header is a circular icon with a blue cross and the text "Main Menu". Below the header is a white box titled "Setup Screen" with a horizontal line underneath. Inside this box are three input fields, each with a label above and a placeholder below:

- Company** (placeholder: Company)
- Division** (placeholder: Department/Division)
- Location** (placeholder: Location)

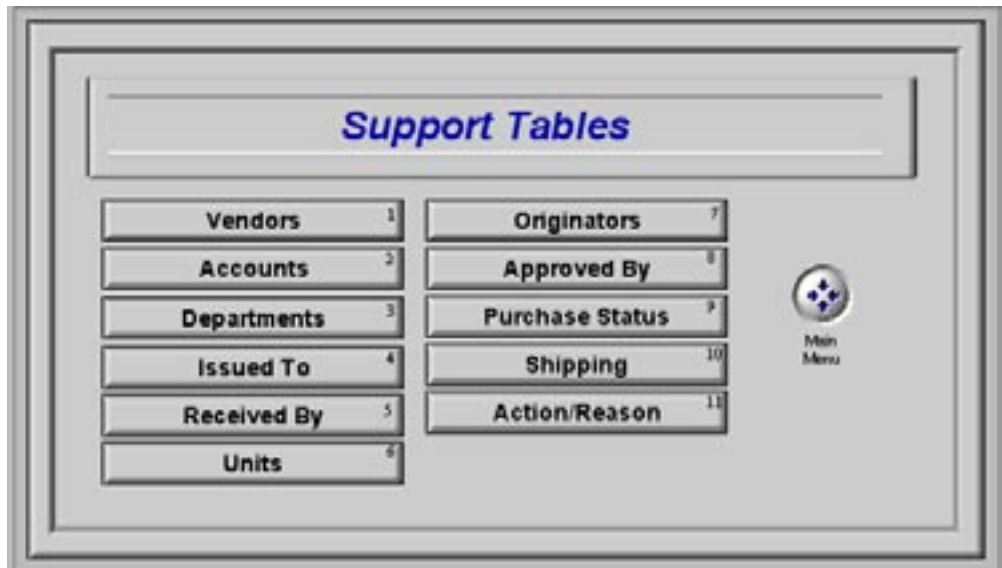
Initial Data Input

For best results and to streamline data input it is best to enter the desired data into the Vendors and Facilities files and review and/or update the Equipment Class Code files before entering asset data. The vendor file is accessed from the Support Tables.

Support Table Data

Support Tables

The support tables are accessed from the main menu. When support tables are selected from the main menu a screen similar to the one shown below will appear.



One Table

The only support table used with the building assets is the vendor table.

Vendor Data Input

Select Vendors and a screen similar to the one below will appear.

View as List

View as List

The vendor file appears in the View as List layout. The view as list layout provides a convenient way view the vendor records.

ID#	Vendor	Phone	Fax	Contact	Discount	e-mail
274	LT Body Builders	(864)609-7111	(864) 609-2284			
275	LT Limited	864 609 7111	864 609 7112			LTBODYBUILDER@ppanva
276	Mike Connellan	(800)600-2222				
277	MASS Home Improvement	(864)333-4334	(833)3867			

Sorting

In the View as List screen the data can be sorted by vendor or contact name by clicking on the small button located to the left of the field name.



A screenshot of a table header with three columns: 'ID #', 'Vendor', and 'Phone'. Each column has a small square button to its left. The 'Vendor' button is highlighted with a mouse cursor.

Print List

From Menu Bar

When Print List is selected from the menu bar a screen similar to the one below will appear. The data to be displayed and printed in this report can be selected and sorted using the find and sort functions described in the Find and Sort Functions section of this Users Manual.



A screenshot of a report titled 'ASPA Wastewater Vendor List'. The report contains a table with columns: ID #, Vendor, Phone, Fax, Contact, Discount, and e-mail. The data is as follows:

ID #	Vendor	Phone	Fax	Contact	Discount	e-mail
194	ASD Procurement Lake ASD General Supply	508-666-1170				
195	Atlantic Pacific Marine Inc.	508-666-7722	508-1503	Sean Gregg		
196	Avanti Travel	508-666-5007	508-5006	Maria or Terry		
197	AWD International					
198	Bay Area Oracle	508-633-1033	633-1042	James or Lily		
199	Blue Book					
200	BP Petroleum (South West Pacific Limited)	633-7388	633-7388	Miana Turock		
201	Brewer Environmental Industries	508-632-7401	508-632-7500	Richard McDonald		

Print the List

The list can be printed by clicking on the Continue button to the left of the screen.

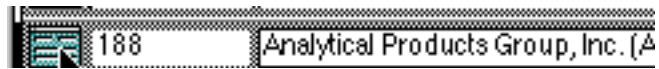


Once selected a new dialog box will appear; select Print or Cancel to return to the view as list.

View as Form

Selecting a Record

To view the record in the Form View click on the green button located to the far left of the record.



When the Form View is selected a screen similar to the one shown below will appear.



New Record

To add a new vendor record, click on the New Record button in the menu bar and a blank record will appear with a vendor number assigned and displayed in the upper right corner. The vendors file is designed to automatically provide a vendor number starting with 101. You can change the default assigned vendor number.

Enter Data

Once a blank record is obtained the data can be entered. Start by placing the cursor into the Company field.

Tab to Move

Enter the appropriate data and press Tab to move to the next field. Shift/ Tab will move the cursor back one field at a time. In addition, the mouse can be used to place the cursor into any field.

Comments and Specialty Fields

The comments and specialty fields are text fields. Any related information can be typed into these fields.

Cross Reference

The purchase request cross reference tab opens a screen displaying building Asset cross reference for any selected vendor.

Manufacturer Of		Supplier For	
Equipment ID	Description	Equipment ID	Description
		100,100	motor
		100,200	Pump
		120,352	Main A/C system
		120,893	Water heater

Edit Vendor Data

Change a Record

The vendor data can be changed in either the form or list views. To change the data, place the cursor in the field and delete or type in the required data. For example; to change Basin Ref. to Basin Refrigeration.

Vendor Information

Name: _____

Company: Basin Ref.

Address: 10150 Kinder Road

City/SA/Zip: Moses Lake WA 98837

Place the cursor after the period in Ref., backspace and type the remainder of the word.

Vendor Information

Name: _____

Company: Basin Refrigeration

Address: 10158 Kinder Road

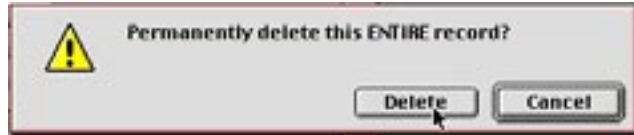
City/SA/Zip: Moses Lake WA 98837

Delete a Record

Vendor records can be deleted in the form or list views. To delete a vendor record place the cursor into any field in the record and then select Delete Record from the menu bar.



A dialog box will appear asking verification of the delete.



To delete, select the Delete button. **Caution:** Undo does not work with Delete.

Facility Files

The facility files are assessed by clicking on the Facilities button on the main menu. When this is done the following screen will appear.

The screenshot shows the 'Facility Records' interface. At the top is a toolbar with icons for 'View As Form', 'View As List', 'Print Reports', 'New Record', 'Delete Record', 'Find Record', 'Photo', 'Floor Plan', and 'Main Menu'. Below the toolbar is a navigation bar with 'Go First', 'Back', 'Forward', and 'Go Last' buttons. The main area contains a form for 'Frontage High School' with the following fields:

- ID Number: 212,000
- Description: Frontage High School
- Bld Width: 45
- Bld Length: 125
- Bld Sq ft: 5,625
- Location: Frontage Rd
- Bld Height: 65
- No. of Floors: 5
- Bld Type: Concrete block
- Date of Construction: 1932
- Cost: \$125,000
- Life Expectancy: 35 years
- Lot Width: 150
- Lot Length: 300
- Lot Sq Ft: 45,000
- Notes: Very old building with a lot of maintenance problems.....
- Architech: Arasmith Consulting
- Contractor: Arasmith Consulting
- Use or Function: Grades 10 - 12

Below the form is a table of equipment:

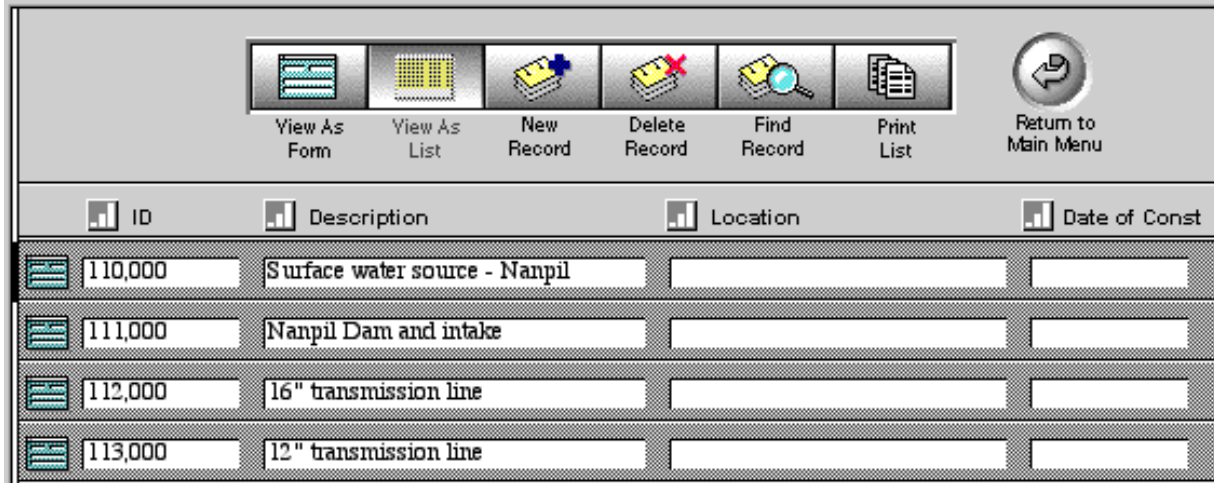
Equipment ID	Equip. Description	Brand	Model
212,435	Main room lighting	GE	Sarlight

Assign Number

Assign the facility a number and give it a description and fill out all of the appropriate fields. The photo and floor plan fields are place holds. You place drawing and photos in these place holders using the Import Picture command in the Import/Export selection under the File Menu. File Maker is compatible with nearly all of the typical PC and Mac formats for drawing and pictures.

View as List

To view any of the asset files in a list view press on the View as List button and a screen similar to the one shown below will appear.



View Data

By clicking on the form icon at the left of the data the form view of this data will appear.

Sorting

Clicking on the graph icon that appears above the data will provide a sort by that field.

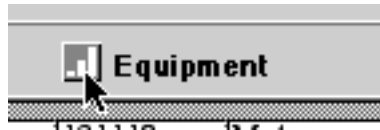


Photo and Floor Plan Buttons

In the menu bar at the top of the facility screen are two buttons, photo and floor plan. Clicking on either button will take you to a screen containing a container that will hold a photo or drawing of a floor plan.



Drawing Formats

Drawing formats that can be imported include, PICT, BMP, GIF, JPEG, BMP, EPSF, and TIFF.

Equipment Class

The equipment class file is accessed by clicking on the Equipment Class button on the main menu. When this is done the following screen will appear.

Class	Description
AGSTRT	Aggregate Street

Data Input

The equipment class code file contains 163 existing equipment codes. New codes can be added by selecting the New Record button and filling in the Class and Description fields. The entire contents of the file can be viewed by clicking on the View as List button.

Pop-up

The equipment class record is viewed as a pop-up menu connected to the Equipment Class field in each of the asset data input screens.

Asset Data

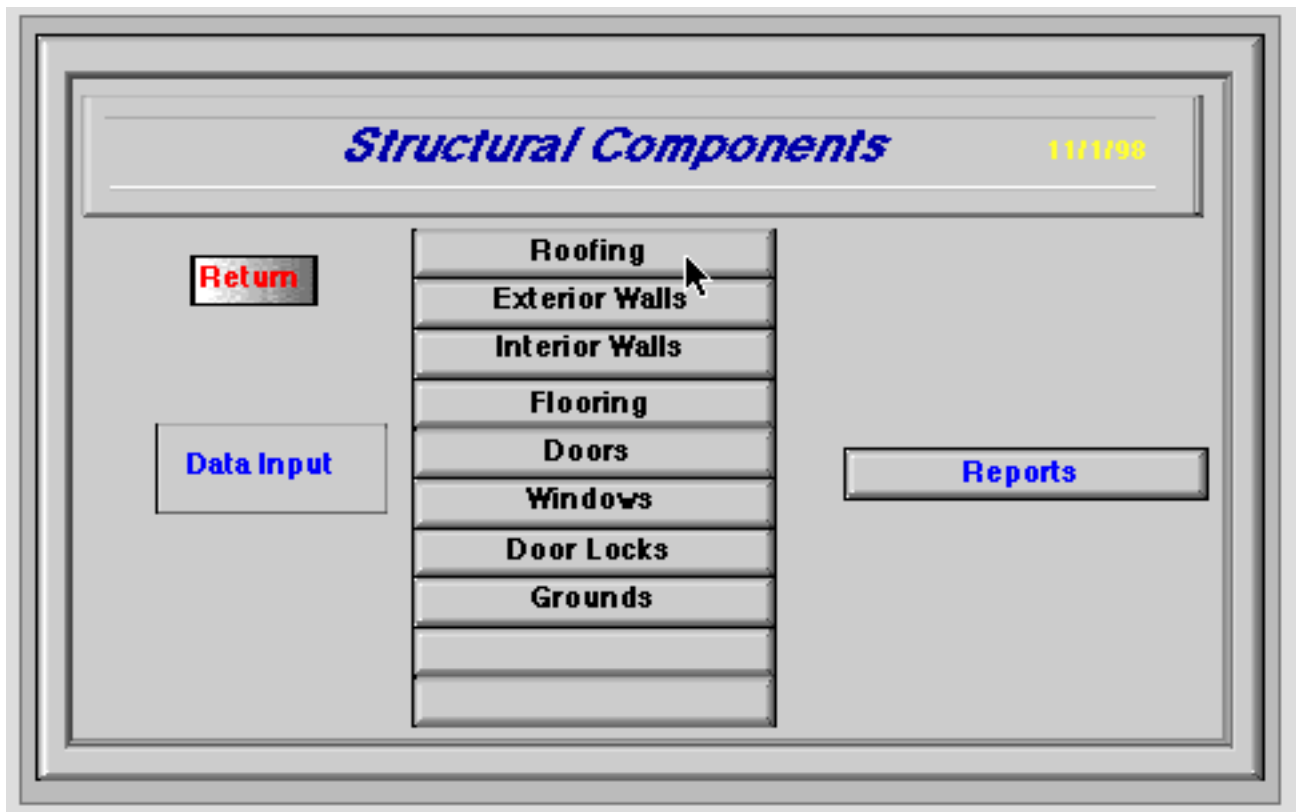
Asset data is entered into the file by first selecting which type of asset is to be entered. There are three options:

- Structural Components
- Systems
- Equipment

The Structural Components button accesses the files for the building structures. The Systems button access the heating/AC, Electrical/Lighting, and Plumbing systems. The Equipment button assesses the general equipment (blackboards, computers, desks, etc.), pumps and motors.

Data Input

Clicking on any one of the data input button will bring you to the data input screen for that set of assets. Below is the screen for the Structural Components asset files.



Selecting Asset Type

From this menu select the type of assets that you wish to enter. On the above screen we are about to select Roofing. When selected the following screen should appear.

Total Records 21
Found Records 3
Current Record 1

View As Form View As List Print Reports New Record Delete Record Find Record Structure Menu

Roof and Roofing Go First Back Forward Go Last

Facility Data	
100,000	Administration
Facility	
100,100	Roof and roofing
Equipment	
ROOF	
Equip. Class	Roof Type
Comments	

Roof Data		
Material	Size - sq ft.	Slope
No. of Hips	No. of Valleys	No. of Other Obstructions
Installation problems		

Asset Data		
Life	Date Installed	Replacement Date
Memo		

Purchasing Data		
101	Arasmith Consulting Resources, Inc.	
Installer		
Cost	Install Date	P. O. No.

Special Notes

Layout Specific

When a data entry layout is selected (Roofing, Exterior Walls, Interior Walls, etc.) the program records this layout so all data entered into a type of layout (Roofing) will be come a roofing record. After the data has been entered, selecting the Roofing Data file will automatically select all records that were entered into the roofing layout.

All Well Equipment

It is intended that all roofing equipment, roof materials, vents, fans, etc. be entered into this record. If a file contains a motor or pump, more complete information about the pump and/or motor can be entered into the pump record.

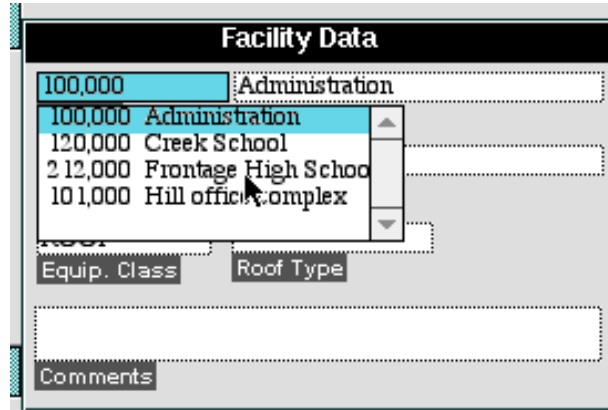
Pumps and Motor Layouts

The equipment that appears in the Pumps and Motors layouts is selected on the bases of the equipment class

code. Codes PUMP and PMPMTR will appear in the pump layout. Codes MOTOR and PMPMTR will appear in the motor layout. Thus a close coupled pump and motor that are always one unit will appear in three places, pump, motors, and the original data input screen, (wells in our example)

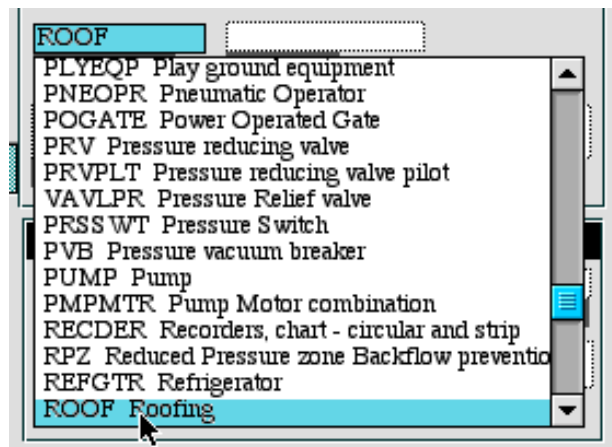
Select a Facility

The facility can be selected from a pull down menu that contains a compute list of all facilities entered into the facilities file. Select the facility and it will automatically enter into the proper data fields.



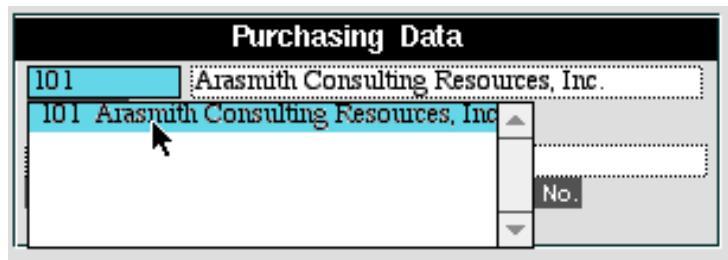
Select a Class Code

The code class can be selected from a pop-up menu that provides all of the codes found in the Class code file.




Vendor Selection


The supplier, contractor, or installer can be selected from a pop-up menu of the vendor file.



List View

Clicking on the List View button will bring up the following screen.



	Facility	Equipment	Size	P.O.	Life	Cost	Equip Class
	131000	Nanmal well #1	131110	Motor			MOTOR
	131000	Nanmal well #1	131210	Pump			PUMP
	131000	Nanmal well #1	131300	Piping System			PIPE
	131000	Nanmal well #1	131310	Pressure gauge			GAUGE

View Form

Clicking on the small icon on the far left of a record will return you to the View Form with this record selected.

Reports

Selecting the report button will bring you to the print report screen.

The screenshot shows a software interface titled "Reports" with a date of "8/8/2000". The interface is organized into three main columns:

- Structure:** A vertical list of buttons including Roofing, Exterior Walls, Interior Walls, Flooring, Doors, Windows, Door Locks, and Grounds.
- Systems:** A vertical list of buttons including Heating AC, Electrical/Lighting, and Plumbing.
- General Assets:** A vertical list of buttons including General Equipment, Motors, Pumps, Tools and Equipment, and Rolling Stock.

At the bottom of the interface, there are three buttons: "Print List" (centered), "Return" (centered, with red text), and "Depreciation Report" (right-aligned).

Specific Reports

Because each type of asset provides different information a different report is provided for each type. All of the reports use the landscape layout. An example of the roofing data report is shown below.

ASSETS.FP3						
Surface W...		List	Menu	Print	Roofing Data	
<u>Equipment ID</u>	<u>Description</u>	<u>Equip. Class</u>	<u>Roof Type</u>	<u>Material</u>	<u>Size - sq ft.</u>	<u>Sl</u>
100,100	Roof and roofing	ROOF				
<u>Facility ID</u>	<u>Facility</u>	<u>No. of Other Obstructions</u>				
100,000	Administration					
<u>Supplier</u>		<u>Date Purchased</u>	<u>P. O. No.</u>	<u>Cost</u>	<u>Life</u>	<u>Repla</u>
<u>Installer</u>		<u>Date Installed</u>	<u>Installation problems</u>			
101	Arasmith Consulting					
<u>Comments</u>			<u>Asset Memo</u>			
<u>Equipment ID</u>	<u>Description</u>	<u>Equip. Class</u>	<u>Roof Type</u>	<u>Material</u>	<u>Size - sq ft.</u>	<u>Sl</u>
110,210	Pump #1 motor					
<u>Facility ID</u>	<u>Facility</u>	<u>No. of Other Obstructions</u>				
<u>Supplier</u>		<u>Date Purchased</u>	<u>P. O. No.</u>	<u>Cost</u>	<u>Life</u>	<u>Repla</u>
<u>Installer</u>		<u>Date Installed</u>	<u>Installation problems</u>			
<u>Comments</u>			<u>Asset Memo</u>			

File System

Asset Files

A hard copy asset file system should be designed and implemented using the asset numbering system. One hanging file is installed for each building and category.

Example

A typical numbering system is shown below.

000,000 = Safety and Management

100,000 = School buildings

200,000 = Public works buildings

300,000 = Parks and open spaces

400,000 = Docks and Harbors

500,000 = Community buildings

600,000 =

700,000 =

800,000 = Tools and portable equipment

900,000 = Rolling stock

File Folders

Within each major section the files are further divided by specific facility. Within each hanging folder is at least one file folder for each piece of equipment found at the will site. The file folder is titled with the equipment number and name.

File Contents Facility

The first file folder in the facility hanging file is labeled "General." This folder contains the print out of a list of all of the equipment for this facility (obtained from the Asset database).

File Contents Equipment

Each file folder contains the report from the Asset database, a copy of the PM schedule for that equipment (from MPS Scheduler), manufactures brochures, and copies of any work orders for the equipment.

Drawings

The second file folder in each facility is labeled Drawings. This folder contains any drawings specific to this facility.

O & M Manuals

Where possible the manufactures O & M manuals are filed in the equipment files. When the manuals are too large they are placed on a shelf in the office. A note is then placed in the files indicating the location of the O & M manual.

Find Function

From the Button Bar

Select Find

A find button is included in the button bar of most screens. To perform a find click on this button and all of the data fields will go blank allowing you to enter the find criteria.



Perform a Find

To perform a find, type the information you want to find into the field that contains the information and then press Continue, Return, or Enter. Notice all of the popup menus are available to assist in the find.

Words or Letters

It is not necessary to type in all of the information. For example, if you wanted to find a name starting with a "C" you would only need to type the letter "C" and the program will find all of the work orders that were assigned to a crew with a name that started with a "C."

Multiple Fields

To clarify a find, you can type information into as many of the fields as is necessary to clarify the find. For example you can select the name of a crew, requested completion data, and equipment ID or name.

Multiple Finds

There are times when you may want to find more than one item in the same field. For example it may be necessary to select two or more pieces of data from the same field. Type in the first piece of data, then either type Control-N or select New Request from the Mode menu and type in the next request. (The number of request that can be made at one time is limited only to a particle limit.) If the status bar is turned on (see below for how to turn on the status bar) you can look through each request to make sure they are as desired.



When all of the request are completed, press Return or Find in the Status bar.

Omit Data

To omit work orders with specific information from a find, click in the Omit box after setting up the find. The result will be all of the work orders not omitted. To view those omitted use select the Find Omitted from the Select menu.

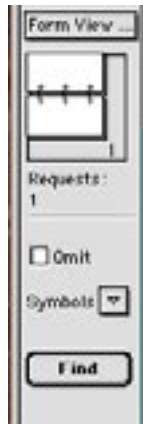


Turn On Status Bar

The status bar allows access to a variety of find and other functions. To turn on the status bar, click on the status bar icon located near the bottom left of the screen.



What will appear will look similar to the image below.

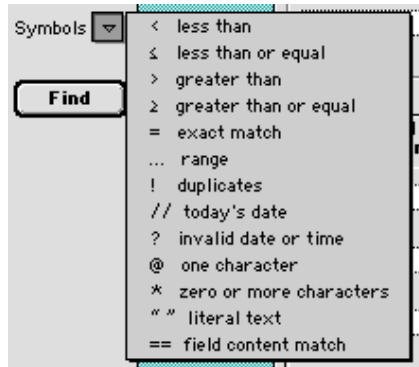


Omit

The selected data can be omitted from the find by clicking on the Omit box located in the status bar or from the menu as described above.

Find Symbols

Once the find function has been selected the status bar will open. Clicking on the small arrow next to the word Symbol will bring up an additional dialog box providing a number of symbols used to clarify finds.



Two Most Common Symbols

Two of the most commonly used are the Range (...) and Exact Match (=).

Range

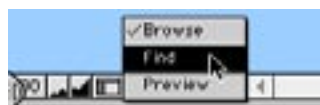
The range symbol can be used to select a set of work orders performed between any two dates. Type in the first date followed by three periods (...) or select the symbol and then the second data, then press the Continue button, return or enter keys.

Exact Match

The exact match symbol is useful for finding work orders where a specific field is blank. To find work orders with no information in a specific field, type a = into a field or select = from the symbol menu. Then press the Continue button, return or enter keys.

Find From the Menus

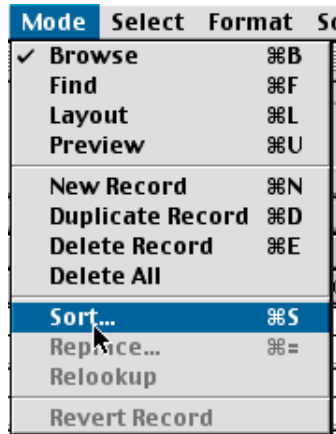
The find function can be invoked from the Mode menu, from the keyboard by typing Control F, or from the Mode Popup menu located at the bottom left of the screen.



Sort Function

Keyboard or Menu

The sort function can be obtained from the keyboard by typing Control S or selecting sort from the Mode menu. This procedure should only be used by those who have knowledge of FileMaker Pro.



Dialog Box

When the sort command is invoked a dialog box will appear allowing you to select which selection of fields and the arrangement of fields for a sort.



Select Fields

Select the field from the list on the left and then either double click or click Move to move the field to the right.



Rearrange Fields

Once the fields have been moved to the right they can be rearranged. Place the cursor on the double arrow to the left of the field and the cursor changes to two lines with arrows. When this occurs click, hold, and move the field to the new position. When completed press Sort.

