

White Paper

simPRO Enterprise Asset Management

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For many businesses, tracking and managing customers' plant and equipment is paramount to success. Tracking this equipment, or "Customer Assets" as referred in simPRO Enterprise, is vital for executing planned preventative maintenance and reporting on its defects and condition.

System Setup / Customer Assets / Asset Builder

System Setup | Forms Setup | Defaults | Mobile | Company

Labour | Materials | Security Groups | Activities | Accounts | Status Codes | Response Times | Custom Fields | Tags | Notifications | Tasks | Teams | Customer Group | Customer Profile | Zones | Scripts | Customer Assets | Plant Builder

Existing Asset Types

Add New Asset Type ?

Type Name	Default Tech	Service Level	
Alarm Systems	Not Selected	3 Yearly, Annually, Monthly, Six Monthly, 5 Yearly, Weekly	Options
Coffee Machine	Not Selected	Six Monthly	Options
Defibrillator	Not Selected	Annually	Options
Delivery Lay Flat Fire Hose	Not Selected	Annually	Options
Emergency Evacuation	Not Selected	Annually, Monthly, Six Monthly	Options
Emergency Exit Lighting	Not Selected	Annually, Six Monthly	Options
Fire Alarm Monitoring System	Not Selected	Annually	Options
Fire Blanket	Not Selected	Annually, Six Monthly	Options
Fire Detection System	Not Selected	Annually, Monthly, Six Monthly, 5 Yearly	Options
Fire Extinguisher	Not Selected	Annually, Six Monthly, 5 Yearly	Options
Fire Hose Reels	Not Selected	Annually, Six Monthly	Options
Fire Hydrant System	Not Selected	Annually, Six Monthly, 5 Yearly	Options
Fire Pump Sets	Not Selected	Annually, Six Monthly, Weekly	Options
Gaseous Fire Extinguishing System	Not Selected	Annually, Monthly, Six Monthly	Options
HVAC	Not Selected	Annually, Monthly, Six Monthly, Quarterly, 5 Yearly, first visit	Options

Configuration

simPRO Enterprise allows organisations to configure an unlimited number of different asset types. Each asset type they configure will then act as a template for how all such assets will behave.

When configuring asset types users can define the following:

Asset Category

Define the type of asset, as well as the basic behaviour of default cost centers for jobs and quotes, which engineer or technician to use by default as a specialist for this type of equipment, and relevant standards references.

Edit Asset Type

Asset Type | Service Levels | Custom Fields | Test Readings | Attachments

Asset Type

* Type Name: Fire Extinguisher

Reference: Section 15 of standard AS1851-200

Job Cost Centre (Optional): Electrical Service

Default Engineer (Optional): Not Selected

Quote Cost Centre (Optional): Not Selected

Asset Reg Type: 0

Description: Inspection Test and Maintenance of Fire Extinguishers

User defined fields

User defined fields or custom fields are fully searchable and viewable fields for the piece of equipment that will also print out on reports. A custom field can be a text field (no limit on characters), date field, predefined drop down list field or a barcode field. A barcode field is essentially a text field that allows users to print the contents of the field in a barcode format. Each field can also be marked as mandatory, so when field technicians are capturing new asset data they are required to capture certain fields of data.

Edit Asset Type ?

Asset Type Service Levels **Custom Fields** Test Readings Attachments

Existing Custom Fields ?

Field Name	Field Type	
Asset Number	Barcode	✗
Level	List	✗
Location	Text	✗
Make	List	✗
Model	List	✗
Size	List	✗
Install Date	Text	✗
Pressure Test Due Date	Text	✗
Comments	Text	✗

Add New Field ?

Field name

Mandatory Field
 Mandatory / Required

Field type
 Text Date List Barcode

[Add Field](#)

Service Levels

An asset service level is a configured level or frequency of service. It can be defined in Days, Months or Years. Each service level can also be associated with a charge rate which is used when creating preventative maintenance jobs from the maintenance planner. This is used in order to work out what the default charge rate is for each type of asset being serviced at that particular level. This can also be overridden on a contract.

Edit Asset Type ?

Asset Type **Service Levels** Custom Fields Test Readings Attachments

Add Service Level [Create Service Level](#) ?

Service Level Name
 Not Selected

Service Levels Update All Contracts? ?

Service Level Name	Charge Rate	Years	Months	Days	
Annually	Inspection Test and Maintenance	1	0	0	Options ▾
Six Monthly	Inspection Test and Maintenance	0	6	0	Options ▾
5 Yearly	Inspection Test and Maintenance	5	0	0	Options ▾

Failure points and Recommendations

Failure points are a checklist of tests that should be performed on a particular asset type at the defined service level. Evoking a particular failure point indicates the asset has failed its inspection at that point, while leaving it alone will indicate it has passed. Each failure point may be linked with a list of predefined options. If a technician identifies an asset test failure, they will be automatically prompted with options to rectify the problem. Each failure point and recommendation can also be linked with a PreBuild for rectification.

When failure points are identified the user has the option to create a quote using Prebuilds already linked to failure points and recommendations. This will automatically generate a quote, which can be checked and sent to the customer, significantly reducing the time required to complete the reporting and quoting needed after a preventative maintenance visit.

Fire Extinguisher - Annually Cancel Save Finish

Failure Points

eForm Name: Not Available New

Failure Point	Standard ID	Critical?	Pre-Build	eForm Match
<input type="text" value="Anti tamper device missing / brok"/>	AS 1851 - 2I	<input type="checkbox"/>	Supply And Install Fire Extinguish	<input type="text"/> ✖

Recommendations

New

Name	Pre-Build	Charge Rate
<input type="text" value="Replace anti-tamper device"/>	Supply And Install Fire Extinguish	5 ✖
<input type="text" value="Blocked"/>	AS 1851 - 2I	<input type="checkbox"/> Supply And Install Fire Extinguish ✖
<input type="text" value="Bracket required due to missing"/>	AS 1851 - 2I	<input type="checkbox"/> Bracket required due to missing ✖
<input type="text" value="Bracket required to be replaced d"/>	AS 1851 - 2I	<input type="checkbox"/> Bracket required to be replaced d ✖

Test readings

Specific test readings can also be configured to be captured as tests are being carried out. A test reading can either be recorded as a free text field, a date field or a predefined list of options. It can also be marked as mandatory so it can't be skipped.

Attachments

Attachments on asset types are normally instruction manuals or technical specifications on a type of equipment.

Managing assets

When migrating across from different systems organisations will typically format their asset database on spreadsheets. This is a great opportunity to standardise the data that already exists on customer's assets. Once the cleanup and preparation is completed, assets can then be imported in bulk. Alternatively, a fresh site audit can be performed on all sites using simPRO connect remote field application. It will produce an up-to-date database of all the equipment installed on your customer's sites.

Customer's assets are typically found on their sites. They can be anything from a fire extinguisher, a coffee machine or even a cat dump truck. All of this equipment needs to be tracked and serviced, with maintenance being the grease that keeps the business wheels turning. On sites assets are typically arranged in a walk order. That is, when you arrive on site and walk around, it's the order you encounter the equipment.

Many organisations are now putting less emphasis on walk order, which requires constant maintenance, and are instead focussing on barcoding or serialising their assets. For example, when the technician is in front of the piece of equipment they can simply scan it and bring it up on their app to do the testing.

The screenshot shows the 'Sites / Northside' interface with a 'Customer Assets' tab selected. A filter dropdown is set to 'Not Selected'. The main section is titled 'Fire Extinguisher' and contains a table of assets. Each row represents an asset with various details and service level options.

Order	Asset ID	Asset Number	Level	Location	Make	Model	Size	Install Date	Pressure Test Due Date	Start Date	Contract	Image	Service Levels								
1	214									23/04/2014			<table border="1"> <thead> <tr> <th>Name</th> <th>Service Date</th> </tr> </thead> <tbody> <tr> <td>5 Yearly</td> <td>23/04/2019</td> </tr> <tr> <td>Annually</td> <td>23/04/2015</td> </tr> <tr> <td>Six Monthly</td> <td>23/10/2014</td> </tr> </tbody> </table>	Name	Service Date	5 Yearly	23/04/2019	Annually	23/04/2015	Six Monthly	23/10/2014
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5 Yearly	23/04/2019																				
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Six Monthly	23/10/2014																				
1	185	4354435	Level Two	456546	Flamestop	DCP	1.0 kg			05/08/2013	ABC Enterprises - PPM Contract		<table border="1"> <thead> <tr> <th>Name</th> <th>Service Date</th> </tr> </thead> <tbody> <tr> <td>5 Yearly</td> <td>06/08/2014</td> </tr> <tr> <td>Annually</td> <td>06/02/2014</td> </tr> <tr> <td>Six Monthly</td> <td>05/02/2014</td> </tr> </tbody> </table>	Name	Service Date	5 Yearly	06/08/2014	Annually	06/02/2014	Six Monthly	05/02/2014
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5 Yearly	06/08/2014																				
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10	213	123456	Level One	Reception	Chubb	CO2	2.5 kg	01.01.14	01.01.16	25/04/2014			<table border="1"> <thead> <tr> <th>Name</th> <th>Service Date</th> </tr> </thead> <tbody> <tr> <td>5 Yearly</td> <td>25/04/2019</td> </tr> <tr> <td>Annually</td> <td>25/04/2015</td> </tr> <tr> <td>Six Monthly</td> <td>25/10/2014</td> </tr> </tbody> </table>	Name	Service Date	5 Yearly	25/04/2019	Annually	25/04/2015	Six Monthly	25/10/2014
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At the bottom of the table, there are action links: [Select All](#), [Print Barcodes](#), [Transfer](#), [Change Contract](#), [Change Service Start Date](#), [Change Service Dates](#), [Archive](#), and [Delete](#).

Users also have the option of printing a list of barcodes for the assets on site and linking with contracts, changing the service level dates on bulk, and transferring assets around. Transferring assets is great when doing swap outs, RA's, cyclical asset assignments, tracking customer movement with their assets, and being contracted to physically move an asset.

A story we get told often is one where people are legitimately transferring assets, then losing them through using ineffective methods of administering. This can result in massive losses of time and money to an organisation.

Drilling down and viewing an asset in more detail shows the full recorded history of everything that has ever occurred to that asset. The system will show the full test history such as what has happened, when it happened, what was the outcome, who did it, as well as the full transfer history. Users can also view and edit the details of the asset, the upcoming services and any attachments on the asset such as manuals or photos.

Customer Assets / Edit Customer Asset

Details Service Levels Attachments **History** Related Assets Cancel Save Finish

History

Filter

Date Range:

Employee:

Project No.:

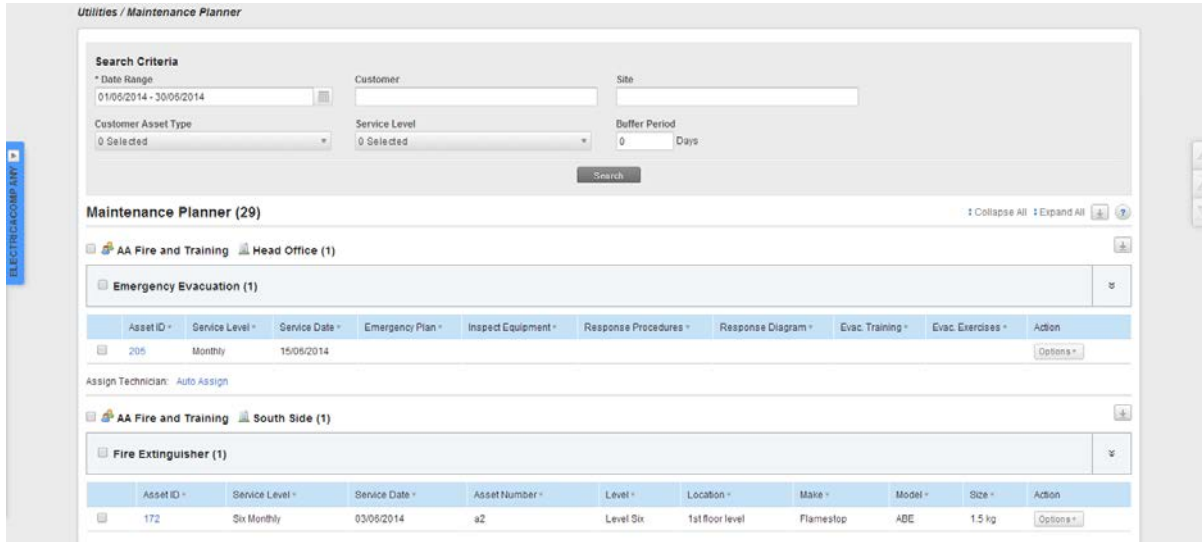
Pass / Fail:

Project No.	Employee	Date Tested	Service Level	Pass / Fail	Notes
27073-2873				No Test	
27034-2798	Curtis Thomson	07/05/2014		Pass	Blah
<i>total hardness:</i>					
27030-2788	John Spratling	29/04/2014		Pass	54
<i>total hardness:</i>					
26872-2447				No Test	
26829-2403				No Test	
26682-2126				No Test	
26651-2076				No Test	

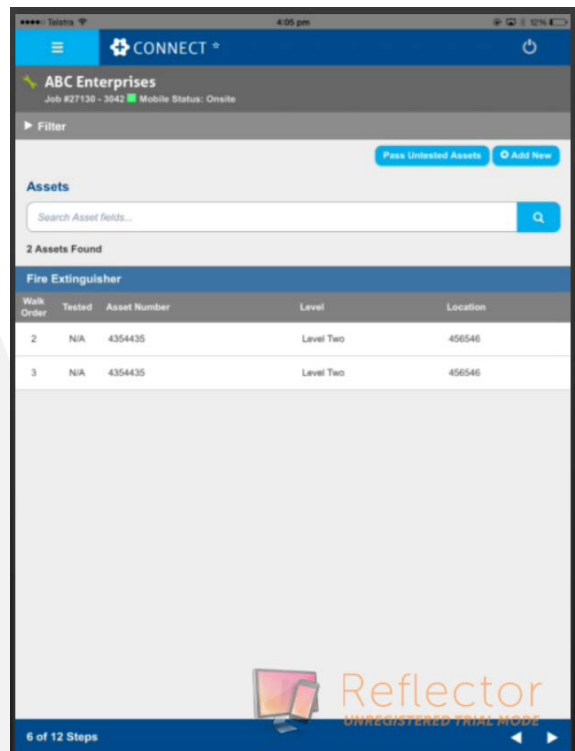
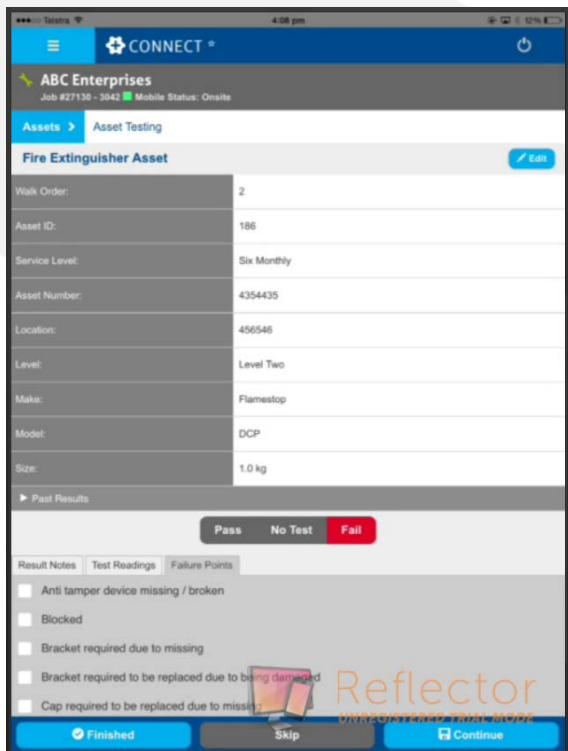
Customer assets can also be nested in with one another creating parent child relationships between assets. This is helpful if you want to view a master system (e.g. control or electrical system) and all the associated assets within it (e.g. control boards).

Physical asset maintenance

The maintenance planner tracks all service frequencies and levels required for assets, collating all the information to show users a list of every piece of equipment on every site, what needs to be serviced and at what service level. This information can then be used to view all the preventative maintenance jobs required for the month with a single click, often resulting in hundreds or thousands of jobs. Those jobs are then either automatically assigned to technicians based on the asset, site and customer configuration, or they can be manually assigned or scheduled.



Whilst on site assets can be managed from simPRO connect. This allows field technicians to view a list of all assets that need to be serviced and what service level needs to be performed. It then feeds down all the failure points configured in the asset builder when capturing their test readings. Users can also register new assets or edit the details of the existing ones.



Access to asset information

Reporting on asset activity is a very important aspect of asset maintenance. As simPRO comes preloaded with reports, both job specific and at a much higher level, you can report back to your customer on the outcome of test results, defect reports, defect rectification quotes etc. Users also have the option to run higher level reports such as, testing regime tracked against a contract's KPI's, testing efficiency averages and typical life spans of pieces of equipment.

Customers can also access basic information and reports on assets from the customer portal. If your organisation grants access for your customers to use the portal they will be able to view the history and details of an asset as well as run their own defect and PPM reports. You are able to direct what your customers can and can't access within the customer portal.

Reports / Assets / Current Defects

Assets

Current Defects

* Site: 101 Fitzroy Street Asset Type: All Search

101 Fitzroy Street -

Asset ID	Date Checked	Service Level	Job No.	Technician	Notes	Asset Number	Level	Location	Type	Make	Model	Diffuser	Comments
95	18/02/2013	Annually	26127	Stephen Bradshaw		38276372	Level Four	89789	EXL	1 x 36w			

101 Fitzroy Street - HVAC

Asset ID	Date Checked	Service Level	Job No.	Technician	Notes	Serial Number	Asset Number	Level	Location	Comments
212	22/11/2013		27498	Tom the Tester		902020	0001	Level Five	Kitchen	Installed by Aircom
429	12/03/2014		28125	Tim Toolman		4566655				

101 Fitzroy Street - Grid Connect Panels

Asset ID	Date Checked	Service Level	Job No.	Technician	Notes	Serial Number	Manufacture	Model
406	11/02/2014		27932	Tim Toolman		Fjdjdjd		Djxjz