Archibus Asset Management
Training Manual

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Introduction

• Introduction – Asset Management in Archibus

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Daniel Murry
(Supply Technician II)

Inventory Control Section is presenting this training. This training will allow you to use the Asset Management (see department’s equipment information)
Asset Management

- Asset Management:
  - Capable of viewing the department / division equipment.
  - Capable of viewing and limited editing equipment (assigning personnel to equipment, adding warranty or service information and adding comments).
  - Capable of viewing equipment by department.
  - Capable of viewing equipment by (Bldg) and floor.

- Who will have access to Asset Management?
  - Only employees assigned to the following roles:
    - **Division Role** - will have access to all of their departments and will be able to view & edit equipment; and will also be able to request surplus, ELA and tagged/non-tagged asset moves.
    - **Department Role** – will have access only to their department and will be able to view & edit equipment; and will also be able to request surplus, ELA and tagged/non-tagged asset moves.
General Information

• Equipment information (asset number, description, price, etc - same information found in Datawarehouse) will be downloaded from Advantage into Archibus every night.

• Each Division will only have access to the equipment belonging to their departments. They will be allowed to view the equipment and assign an employee to equipment.
  
    – Division is allowed to change the custody of an equipment to a departments (within their division). Create a Tagged Asset/Non-Tagged Asset Move Request and enter the transfer information in the Description field. Inventory Control will verify with the gaining department.

• If a Division wants to transfer equipment to a department not in their division, send an email to Inventory Control with the transfer information (asset number, gaining department and point of contact). Inventory Control will verify with the gaining department and manually change the department code for the equipment. If gaining department refuses custody, Inventory Control will not make the department change and will notify the originating requestor.

• Each Department will only have access to the equipment belonging to their department. They will be allowed to view the equipment, assign an employee to equipment, make equipment location moves, ELA moves and surplus equipment moves.
  
    – If a Department wants to transfer equipment to a another department (within their division), notify their Division and they will create the Tagged Asset/Non-Tagged Asset Move Request. If the department is not in their Division, send an email to Inventory Control with the transfer information (asset number, gaining department and point of contact). Inventory Control will verify with the gaining department and manually change the department code for the equipment. If gaining department refuses custody, Inventory Control will not make the department change and will notify the originating requestor.

• Annual Equipment Inventory – transition the current annual equipment inventory requirement into the Archibus software.
Log-in to Web Central

Username is your ACE ID.

Password is your ACE ID password.

Information about the Data in Web Central.

April 2015
After you log-in, decide where to go...

1. Looking for:
   - a particular piece of equipment
   - a department’s equipment inventory
   - the various departments’ inventory, within a division.

2. Assign personnel to a specific piece of equipment.
View Assets

To check equipment asset information.
Asset Information

1. To check a specific piece of equipment and to add limited information, such as Employee Name, Service Contract information, Warranty information or additional comments.

2. To check all equipment for a specific division or department (depending on the individual’s assigned security role).

3. To check all equipment for a specific division or department assigned to a specific Building and Floor.

4. To check all Tagged Asset/Non-Tagged Asset moves for the division.

5. To check all Surplus Equipment moves for the division.
View and Edit Equipment Information

1. Enter equipment code or P.O. number or a specific list, then click ‘Show’

2. Enter equipment code, then click the ‘Enter’ tab or choose from the equipment list to find a specific piece of equipment.
1 - Search for Equipment Code - Using Filter

Enter equipment code, then click ‘Show’
Click on the equipment code or any other field, to see equipment record.
1b – Equipment Information

1. Add employee name, service contract, warranty and additional comments (as needed).
2. Click Save.

HINT: This added information is for the department’s use only, it will not be reflected in Advantage.
2 - Search for Equipment Code Using Purchase Order

Enter purchase order, then click ‘Show’
2a – Equipment Code to Purchase Order

Equipment Code assigned to this purchase order
View Equipment by Department.

Select applicable 'Department'.

HINT: Date Last Inventory From & To is for Inventory Control's Use.
1a – Department Equipment List

View equipment list or Click ‘XLS’, to export equipment list to Excel.

HINT: ‘Refresh’ clears department(s) and returns to Division level.

HINT: Only 150 assets numbers will be viewed.

HINT: Deleted asset numbers for the current month will be included. They will drop off the following month,
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<th>Tag Number</th>
<th>Date of Acquisition</th>
<th>Equipment Description</th>
<th>Serial Number</th>
<th>Asset Value</th>
<th>Asset Type</th>
<th>Building</th>
<th>Floor</th>
<th>Room Number</th>
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</table>
2 – View Equipment by Department Code

Enter Department Code, then click ‘Show’
2a – View Department Code

Click 'Department'
View equipment list or Click 'XLS', to export equipment list to Excel.
View Equipment by Floor

1. Enter **Building Code**, then click ‘Show’

2. If building is viewed, click applicable floor

HINT: Partial building list
1 - Applicable Building Code

Enter **Building Code**, then click ‘Show’
1a - Applicable Floor

Select applicable floor

HINT: ‘Ext’ Exterior – indicates any equipment codes located outside of the building (carts, vehicles, etc.).
HINT: View departments within the division.
1c - Equipment List

Click ‘XLS’, to export equipment list to Excel.
Examine Tagged Asset/Non-Tagged Asset Moves (Division Role)

Examine all Tagged Asset/Non-Tagged Asset moves requested by division.
Examine Surplus Equipment Moves (Division Role)

Examine all Surplus Equipment moves requested by division.
Summary

• **Asset Management:**
  
  – View Equipment by Equipment Code (Asset Number), Department, and (Bldg) &Floor.

  • Limited editing to equipment: Assign personnel to equipment, add warrant or service information and comments. **Note: This information will not be exported into Advantage.**

• **General Information:**

  – Equipment information is imported from Advantage to Archibus nightly and Bldg/Room locations information is exported from Archibus to Advantage in the evening.

  – Security Roles: Division and Department.

  – Annual Equipment Inventory – transition into Archibus.