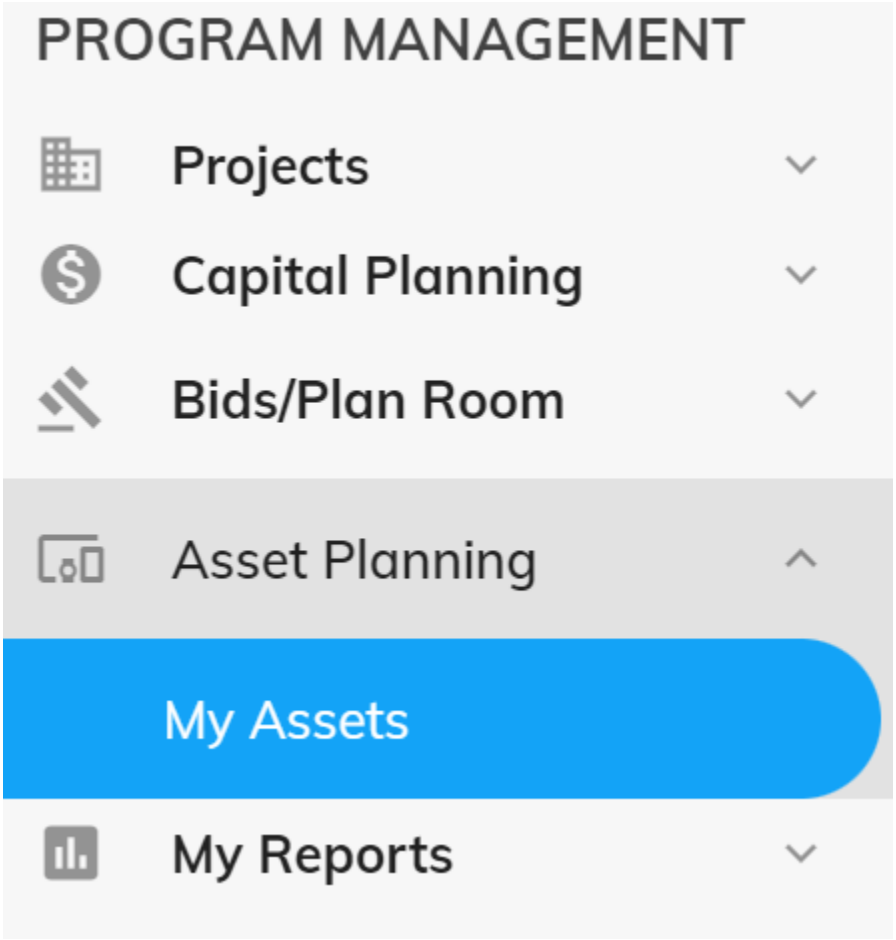
ASSET PLANNING

What Is The Asset Planning Feature?
The Projectmates asset planning module gives your construction team one central location to store all of your asset's records. Track warranty information, manufacturer information, equipment standards, who did what when, and more.

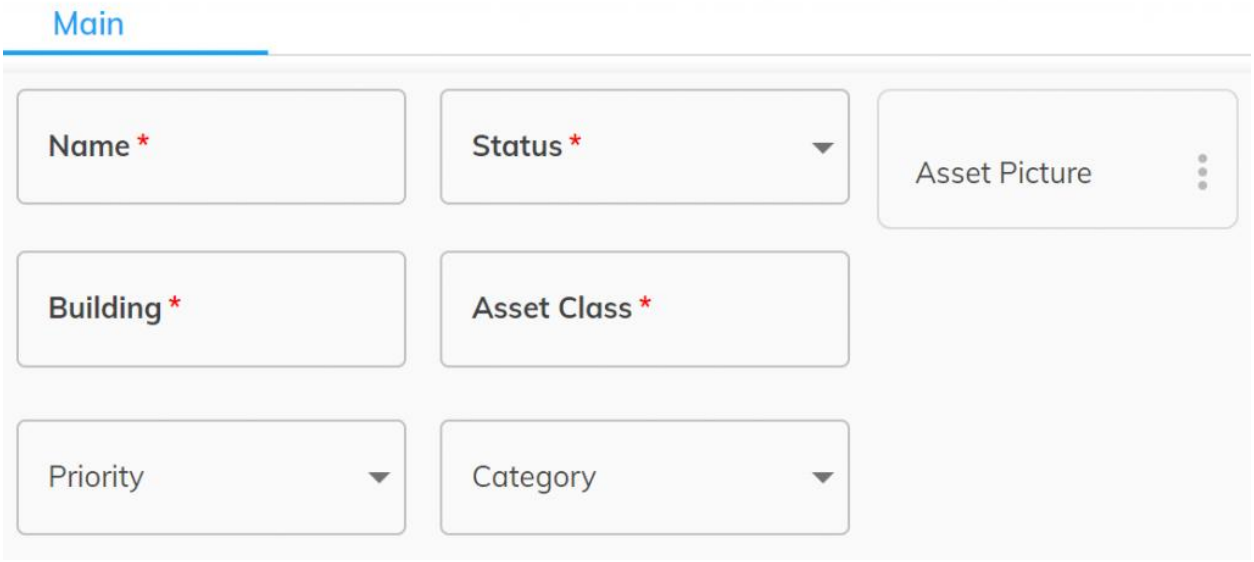
Adding Assets
Projectmates enables users to add assets directly in Projectmates at the program level or directly in a specific project.

1. Locate the Asset Planning module located within the left side menu bar and click into the My Assets section.



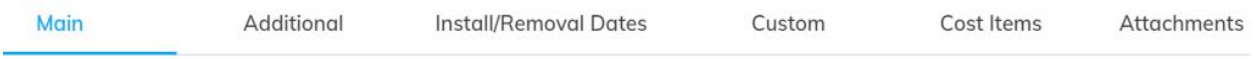
2. Locate the **+Asset** button located in the upper right-hand side of the page.

3. Fill out the required fields on the **Main** tab first.

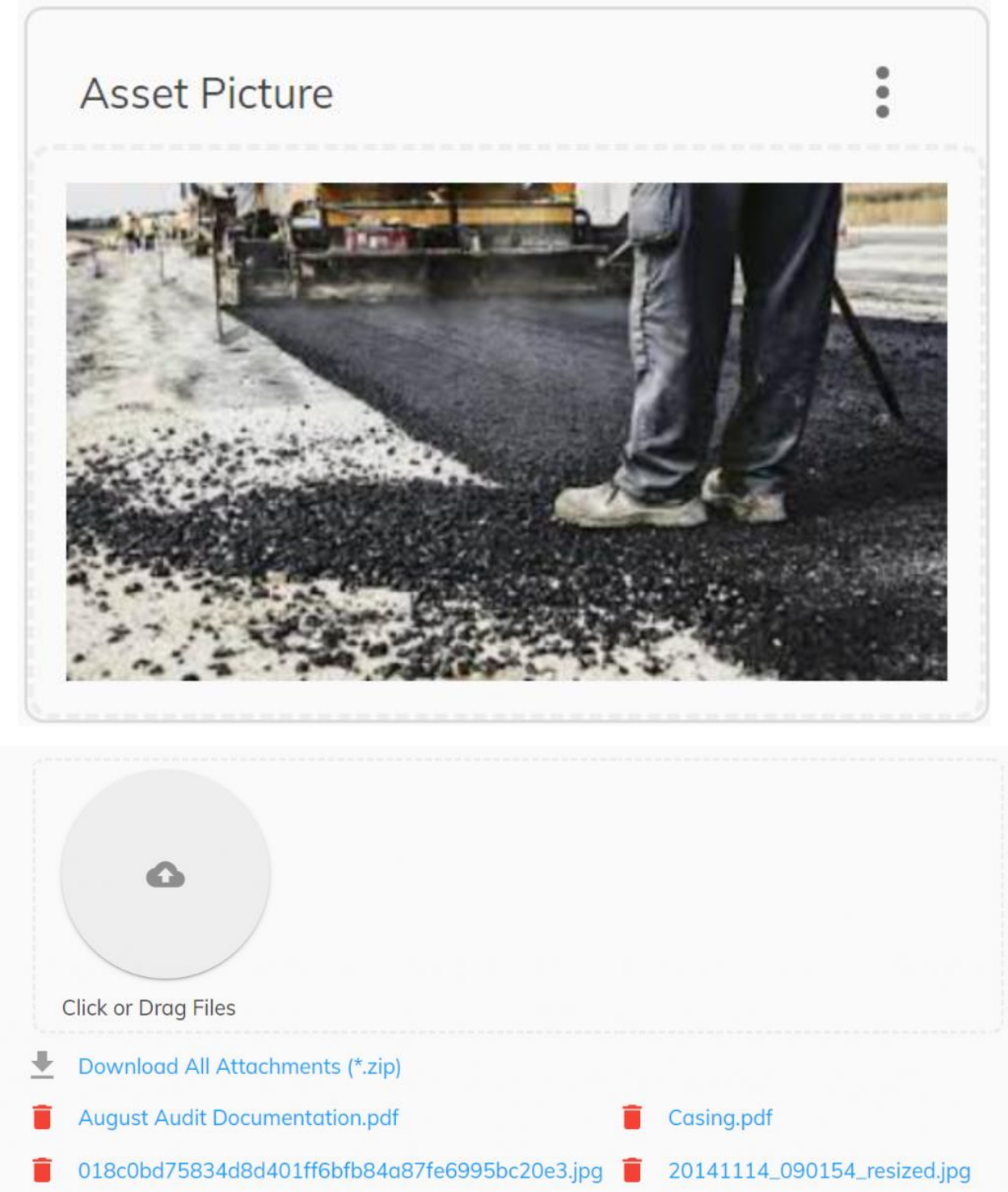


4. Once the required fields are fulfilled, click the Save button and the additional tabs for asset attributes will show up across the top and will be available to be filled in.

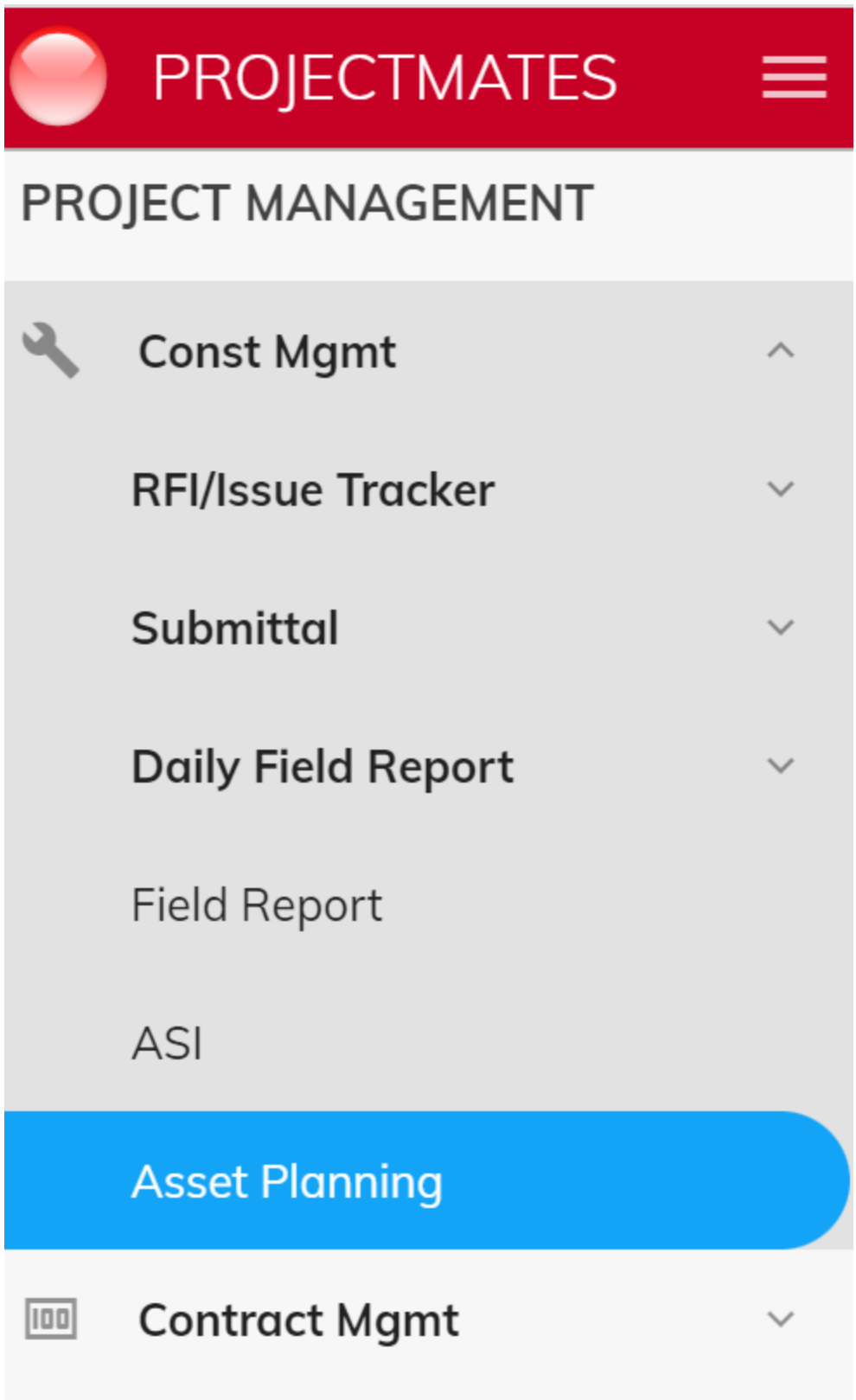
Note: these tabs are configurable for each client, so your view of asset planning may differ from the screen shots in this guide.



5. You can add an asset picture on the main tab and the picture will display in the UI. Additional attachments can be included on the attachments tab and by hovering over them you can preview the attachments content.



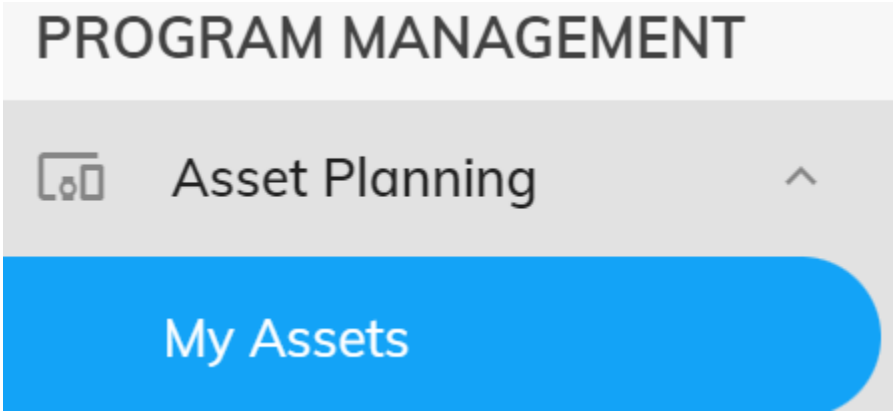
Note: The exact same steps can be followed from directly inside a project. Asset Planning is located within the construction mgmt. tab of a project.



Importing Assets

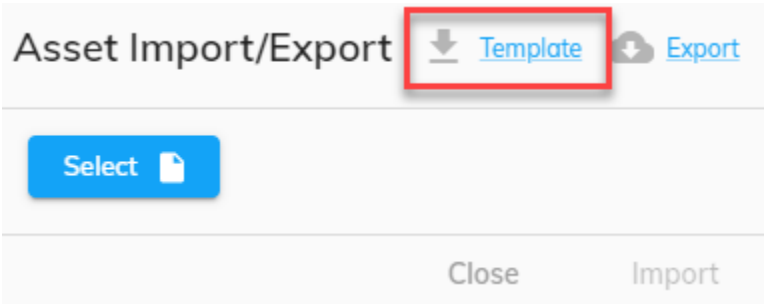
Projectmates allows users to import assets formatted through our Template to make adding multiple assets at once quick and easy.

1. From the Asset Planning page open the assets log (this can be done at the program level or within in a project).



2. Click on the **Import/Export** button in the upper right-hand corner.
3. From the window, select the option to for **Template** to download the import template.

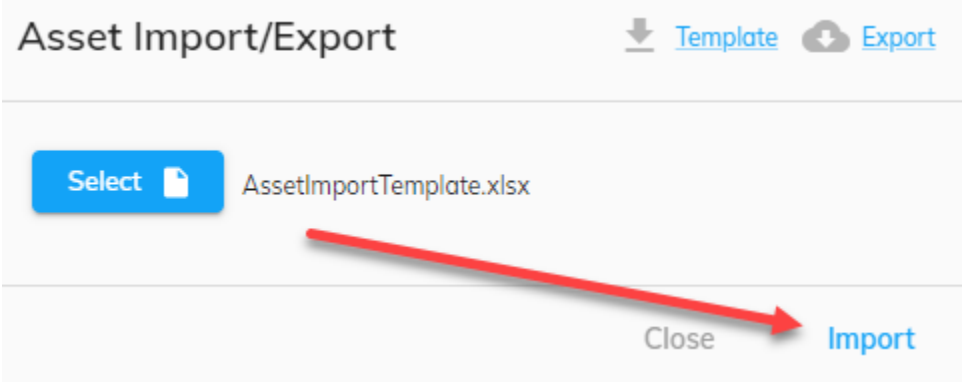
Note: You can also Export out the existing assets and make updates to their attributes along with adding new assets.



4. Fill out the excel sheet. The required fields are highlighted in blue.

A	B	C	D	E	F	G	H	I
Id	ExternalSystemId	ProjectNumber	Status	Group	AssetClass	Name	Model	SerialNo
319		SS-69	Active	Ankeny IA	D2020	Water Heaters	DTS-19	1019074
320		SS-69	Active	Ankeny IA	D3030	Condenser	PUY-A12NHA3	05U002070
321		SS-69	Active	Ankeny IA	D3030	Condenser	ZS1-3	10-06-3-4465
322		SS-69	Active	Ankeny IA	D3030	Condenser	PUY-A12NHA3	95U00337C
323		SS-69	Active	Ankeny IA	D3030	Condenser	PUY-A24NHA3	93UO23R98B
324		SS-69	Active	Ankeny IA	D3040	AHU	RN-025-3-0-EB09-349	200911-ANGR07857
325		SS-69	Active	Ankeny IA	D3040	AHU	RN-031-3-0 0-EB09-3C9	200911-BNGU07864

5. To reimport, click on the blue **Select** button in the same window that you got the template from.
6. Then click **Import.**



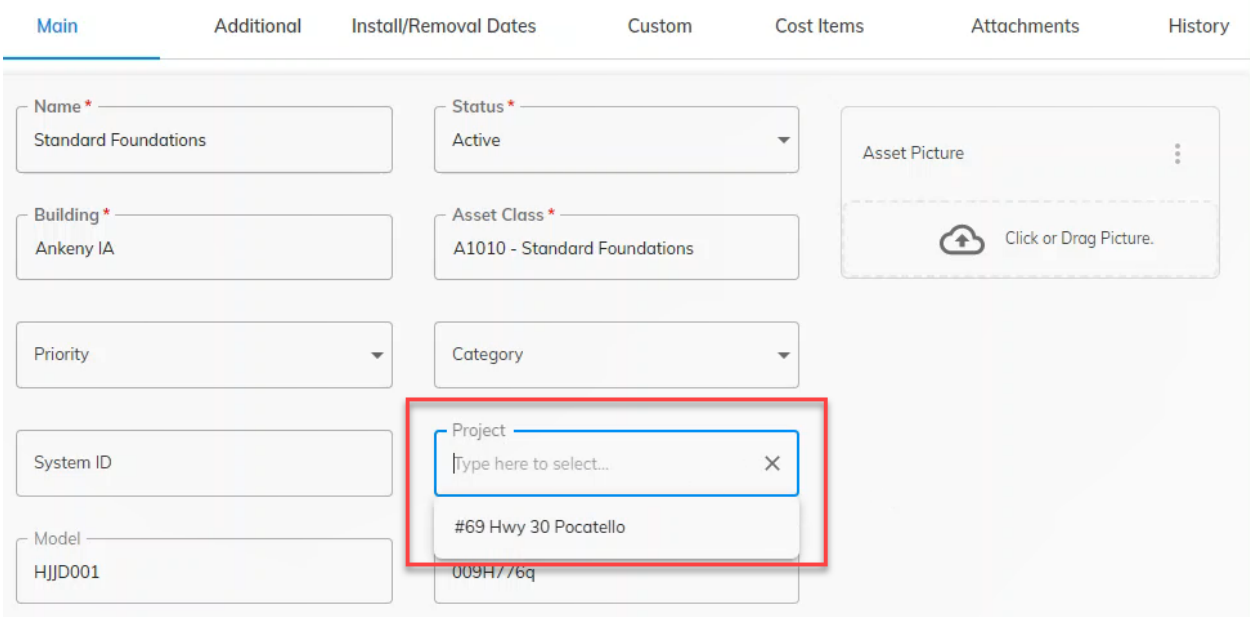
Associating Assets With Projects

Once an asset has been created or imported into Projectmates, the asset can be linked to the specific project that it is associated with. This will result in that asset showing up in in the asset planning section of within the project. This allows for a mass import of assets at the program level, rather than having to import assets into one project at a time.

1. Click on the asset that you want to link to a project. You can do this by clicking anywhere on the asset line.

	System ID	Building	Class	Name	Location (w/in building)	Status	Priority	Category	Total Cost	Project Name
☐		Ankeny IA	A1010	Standard Foundations		Active			63,750.40	
☐		Ankeny IA	B2010	Exterior Walls		Active			318,040.5	

2. Start typing the name or number of the project you want to link the asset to and the corresponding projects will appear below to choose from.



3. Be sure and click **Save** before leaving the page to ensure your changes stick.

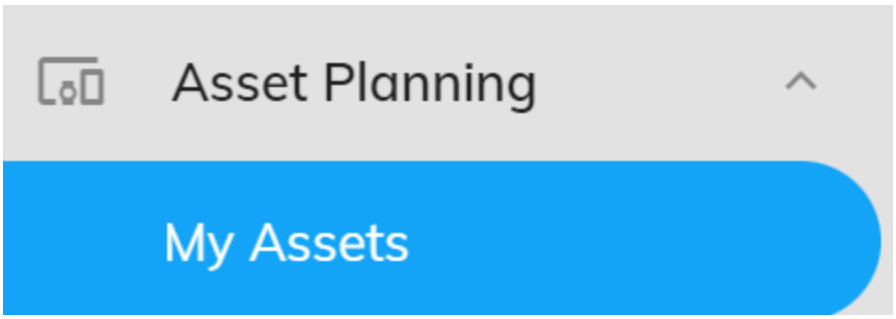
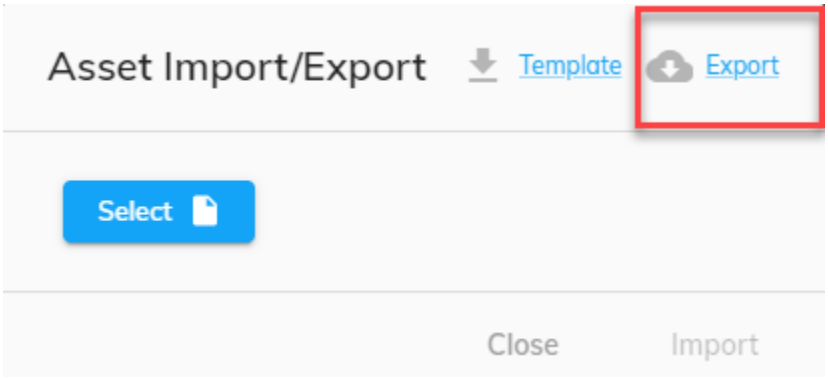
Note: The linked project will now display in the **Project Name Column**. Users can click on the project name to jump directly into the linked project from the Asset Planning page.

Class	Name	Project Name
B2010	Exterior Walls	#69 Hwy 30 Pocatello (SS-69)
B2020	Exterior Windows	#69 Hwy 30 Pocatello (SS-69)

Exporting Assets

It is very easy to export assets out of Projectmates. Assets will be exported into the same excel template that is available to import assets. This excel template makes it very easy for asset data to be shared or imported into other systems.

1. From the Asset Planning page, open up the list of assets (either from the program page or from within a specific project.



2. Click on the **Import/Export** button located in the upper right-hand corner.
3. Click on the **Export** option to export out the current list of assets into an excel sheet.