**Inspections Training Series #3 How AssetSync Can Help with Inspections**

0:05
Good morning, everyone.

0:06
Thanks for joining us today for this webinar #3 in the training series, Inspections Training series.

0:14
My name is Kevin and I'm helping Moderate facilitate this webinar for our presenters.

0:21
We have everyone's lines muted for the best sound quality.

0:25
As we are recording this webinar, we'll add it to the library as usual so you can reference it later and let's see for questions.

0:35
If you have questions, feel free to submit them at any time during the webinar.

0:40
However, we will reserve time at the end for Q&A and I think that is all I have in terms of housekeeping at this point.

0:50
I'd like to turn things over to Randy Walsh.

0:53
Randy.

0:55
Great.

0:55
Thanks, Kevin, and good morning and thanks everybody for taking the time out of your busy schedule to to join us.

1:03
Shane, can you go ahead and advance the slide one, please?

1:07
So just a little bit of background before we get started on the actual training session.

1:11
I, I think it's being an understatement of I said that everybody isn't aware of what's going on with the global pandemic and related to COVID-19 and the dynamic world that we're living in right now.

1:28
You know, you hear asset works, have you been to any of our asset world conferences that we really promote this concept of the asset works family, which is the employees as well as all of our customers.

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So as we're going through these challenging times, we really are trying to continue to extend that that idea of family.

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And one of the, one of the things that we, you know, are, are trying to do to, to help you our customers during these dynamic times is, is to provide some access to some of the products that you may not already have.

2:06
That given what we're hearing from a lot of the industry groups like APPA and NASPA and others is, is that there is a high expectation that there is going to be new requirements, new needs, new compliance requirements around custodial, janitorial, cleaning type of activities to ensure that your facilities are safe to occupy and be utilized by your staff, your students, your faculty, your citizens, your constituents, your facility, you know, team that that's out there.

2:48
So it's part of that effort.

2:50
What we've tried to do is package together some of our solutions that we think can help in that realm, which include our Go asset management, which then unlocks the inspection functionality in both the Go product as well as in the core AIM solution.

3:06
Because we potentially need to create a lot of asset data related to that.

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If you don't already have it or you need to manipulate your existing data or you just want to put a whole bunch of new assets associated with PM template so that we can auto generate inspections.

3:28
You know, we're we're providing access to the asset sync as well as when we do inspections and we find issues and we want to remediate those issues.

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So the the remedial action functionality we potentially wanted to go all the way through into a work order to allow your resources to go out and respond to those.

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So we also are providing access to one of our off the shelf business automation scripts that will convert a remedial action all the way into an actionable work order.

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And of course providing access to these modules isn't going to provide a lot of value unless we also show you how to use them right.

4:07
And so we put together this training webinar series specifically to be able to allow you to put these into practice.

4:14
So 90 day unlimited temporary use license for Go asset management, asset sync in the business automation script.

4:23
And then as we're doing the training, keep in mind we're not trying to do broad based training.

4:27
We're doing it for a specific use case scenario, which is this idea of compliance inspections related to your custodial cleaning, disinfecting type of activities in response to COVID-19.

4:43
So if you haven't already reached out to us, if you want to know more about what we're doing, any questions related to that, please feel free to reach out to me directly randy.walsh@assetworks.com and happy to to help you go through this if it's something that you're interested in.

5:02
So without further ado, I'll turn it over to, to Shane Westinger.

5:07
Does he that may not be familiar with Shane recently joined us in 2019.

5:12
He comes from your guy's side of the house.

5:15
So he was at MD Anderson.

5:19
So he does understand the owner side of the house.

5:24
And with that, I'll let Shane kind of walk you through the next this next session in our webinar series.

5:30
So Shane, I'll turn it over to you now.

5:32
All right, thank you, Randy.

5:35
So as we walk through, like Randy said, we know we're looking at some particular functionality inside of our IWMS solutions.

5:44
And when you look at it stem to stern of what we offer, we're finding that a lot of your customer, a lot of your peers are using other aspects of the software to address the challenges around this pandemic.

5:57
So it's interesting to hear how the, the, the approach to addressing these challenges are leveraging different pieces, parts of the solution that we offer to get it done for them.

6:09
So later this month, there will actually be one of your peers doing a webinar talking about how they use another, another part of the asset works products to address those challenges.

6:21
So today we're really just talking about pieces inside of AIM with the with the asset sync tool.

6:27
But next week we'll be talking about now the combination of AIM and go.

6:33
So just to kind of backtrack a little bit cover, you know, give you a highlight of what we've covered thus far.

6:38
So in session one, we were configuring an inspection.

6:42
So we helped, we did, we defined how we wanted to categorize those inspection items that we address.

6:49
We put the workflow steps together that are necessary for that inspection to process.

6:56
Then we put together, you know what we call that inspection and then the action items that we want to do for that inspection, the line items and then even the responses we may be looking for against those line items to help drive more detail for detailed information from the field.

7:13
And then allow us to leverage that within AIM as we process it further.

7:21
And then we looked at how we can manage how these inspections get to our users in the field through AIM, I mean through go set up.

7:31
And then we actually executed an inspection within AIM.

7:35
So we answered the questions and then completed it within within AIM.

7:41
The second section session that we did, we generated P we created PM templates and then generated work orders off of those.

7:47
So our PM template essentially set that that scope of what we want to do for the work.

7:53
We put classifications on it.

7:55
The the timeline that we want this type of PM to last.

8:01
We assign groups with it being able to put it to multiple assets on a single work order or 1 to one asset per work order.

8:12
We did the multiple.

8:14
We also set the the type of the type of measurement that's going to be used in the frequency of the measurements.

8:21
So was it is it monthly at a certain date and all those kinds of things.

8:25
And then we put the date projection.

8:27
Then when when we completed that, it put a date projection on which what's the date each one of those work orders will be kicked out on based on those types and frequencies.

8:40
And then we added a template faced to that PM template where we selected the fundings and assigned those your work group codes, your work codes.

8:50
We assigned the inspection that we created the week before to that phase of the template.

8:55
Then we set the baseline schedule day where where's my baseline measurement from that if we're going to then generate out based on our our types and frequencies.

9:04
And then finally we associate assigned the asset locations to that phase and then we went to the PM generator and took that template, set the house how many months out we wanted to create work orders and then generated the work order.

9:24
And so this then had one work order, multiple phases, each one of those phases representing a location and an inspection.

9:35
So #3 sessions take it being taken care of today on about asset sync and then four, we'll wrap it up next week with next Tuesday and next Thursday closing it down.

9:48
So today let's step into how asset sync can help you with inspections.

9:54
So we'll start off here with just a what is asset sync.

9:57
So if none of you are familiar with asset sync, it was, you know, as it works, we built it because we knew that you guys had challenges of dealing with multiple assets and then keeping them In Sync with multiple sources of information.

10:13
Those sources of information could have been tech, could be technology based, you could be getting information from BAS system or a financial system, or they could be coming from contractors or or projects that are taking place where they're adding a whole new set of assets based on some construction.

10:30
And so managing those assets on a one to one basis is tedious to say the least.

10:35
So what we're looked at as how can we help with bulk updates to your asset information that you have in AIM or even bulk additions to of new assets.

10:47
So in order for you to do this, you know, you would have to try to build your own interface with your own, you know, your own system.

10:54
You'd have to bring in, you know, some technical expertise could you might not have the resources to do it.

10:58
So with asset sync, you get out-of-the-box functionality to handle all those challenges.

11:05
You get to use a familiar interface with Excel to manage that data that comes out of Excel out of AIM and then you put back in the AIM and then it provides validation, which is, I think the key to this asset sync tool beyond it being simple to use with Excel, you're getting that data validated when it comes in to make sure it complies with the aim structure and expectations.

11:29
So now you eliminate that error that could come in with your, with your assets and no, no garbage in kind of a thing.

11:38
So when we're working with asset sync, we're going to do just a few steps here.

11:42
We're going to 1st determine which kind of data that we want to pull out of it.

11:45
So we have asset data in there that we want to pull out.

11:48
We we'd set that up and then and and select it via the queries or we can just use a template.

11:56
Now when we export it, this template would just be a blank Excel spreadsheet with the appropriate headers and data definitions associated with it.

12:05
So that could be something that would be handed off to a contract or a project team to say this is what I'm expecting from a data perspective for my assets that I can then import.

12:17
Once we have it out, we can then manipulate that data so I can make modifications to it.

12:21
We can add more, so we can add new assets and we have a large breadth of data to that we can manage there and it's again it's all in Excel.

12:33
Then the import process takes place and when we import that, then that data validation occurs and then we can see the results of how that data comes in and act on those results.

12:46
And then we, that review process is where we go in and then adjust those issues that came up through the error log.

12:54
And at this point, we can then accept them into the system and, and the updates are made.

13:00
So I mentioned there's a large amount of data that's associated with an asset that can be managed with asset sync.

13:06
So here's an example of the, the, just the wide variety of information that you can manage with this tool.

13:13
And today we're going to be doing creating new assets and associating PM templates.

13:22
So when we get into the system, the asset sync information is located on the AIM port module.

13:28
So the AIM port modules where we're collecting the standard data exchange function.

13:33
So if you're using other pieces of our technology, you may be using these these other data syncs.

13:40
So we're going to run through the export process, which is going to get us our data and template and pull that out.

13:46
Then we're going to modify that data.

13:49
We're going to use the asset import to bring that modified Excel file in.

13:53
And it's going to then tell us if there's any issues within that data set.

13:57
And then with the review, we're going to go ahead and make the changes to that and make sure that we don't get any mistakes coming into our data into our AIM system.

14:07
So on the export function, it's going to pull up a basic query screen.

14:13
You should be familiar with it.

14:14
It's all, we use it all throughout at AIM.

14:17
So you'll be able to then pull the the specific asset information you want by this combination of query items.

14:25
When you execute it, you'll get your list of assets that are going to be exported.

14:30
You can then validate to make sure that this is the asset information that you want to pull.

14:35
And then you have a few options on how that asset information comes out.

14:40
Now it's going to export to Excel.

14:41
So you can export all that data and the associated asset information out to a structured asset sync template in Excel, or you can just do the file format, which just gives you a blank template that we'll look at as well when that data comes out.

15:00
In this case, we're looking at one that had that we did that data export.

15:05
So you'll notice that the structure of it is again, very basic.

15:08
The yellow tabs that are the yellow columns represent fields that are mandatory, Gray columns optional.

15:16
The asset tag is that key item that that that unique identifier that represents the asset.

15:23
In this scenario, we're looking at room numbers as the unique ID or location numbers as a rate unique ID.

15:29
And then we have various tabs across the bottom of the of the spreadsheet where there's more data about the asset that can be modified and added.

15:39
And the one we'll focus on, if you look to the right, is the PM templates there.

15:43
And that right is where we're going to make sure that we have our asset tag numbers over there.

15:48
And then we'll associate the PM that we created last time and then a set a date for it to be measured against of the project for the next work order to be measured again.

16:02
When it comes time to import it, we'll just choose the file that we that we created out there.

16:07
And then we have an option for what how we want the asset tagged.

16:11
Now one of them is AIM generated, which means Aim's going to throw an auto sequence number, auto generated number on that on that asset as unique ID.

16:20
But in this case we're using room I DS, which are our unique ID.

16:23
So we want it to be file supported when we bring it in.

16:27
Once we bring it in, you'll get a list of all the assets that are that you that were on the spreadsheet.

16:32
And then the review status field will show you if there's anything that may have to be looked at or manual reworked.

16:40
Now, if you get these statuses and it does, it tells us, hey, something's going on with that record, but we don't really know.

16:47
That's where the error log comes in.

16:49
So you hit the error log and that'll take us to the detail about what's the reason for the error, what file tab did it come from on our asset sync import file, and then even what line item on that file did that error occur from?

17:06
So it gives you a pretty detailed information about what went wrong.

17:10
So sure, you could look back back at the Excel file and try to track back what what the issue was and trying to make sense of it.

17:17
But what we allow, what the advantage here is this validation lets us print go into asset sync review.

17:24
Now this asset sync review has already found the errors for us.

17:28
So when you click on one of the asset IDs, it brings you into the review screen.

17:35
The review screen has that header part across the top, but the lower part splits into two.

17:40
The left hand side shows you the values, the data values in aim Today.

17:47
At this point in the on the right hand side shows you the data values on the import file.

17:52
It highlights the fields that are mandatory.

17:55
And as you look down and as you would Scroll down on the screen, which will do, it'll highlight for you that discrepancy or or that, that, that, that update difference in the scenario you're looking at here, we're showing that with there used to not be a location associated, but now there's a location associated.

18:16
All right, so with that, let's step into AIM.

18:26
OK.

18:27
So we will log into AIM land on our work desk.

18:31
We're all familiar with that.

18:33
I'm going to go over to the AIM port module all in here and then notice we have all the variety of of data synchronization functions there.

18:45
If you're using asset and analysis and assessment and analysis module, we've got the information here.

18:52
If you've got Coby where you're bringing in construction information, you got that.

18:56
If you're using, you've got floor plans related through AIM CAD, This is how you manage them through this.

19:01
So through AIM CAD floor reviews.

19:03
So all those, all those data exchange tools are here, but ours are asset export, import and asset sync and export, import and review.

19:13
So let's go do an export.

19:16
So when we do an export, it brings up this query, the search screen that we're familiar with, right?

19:22
And so any variety of functions you want to use, any variety of combinations you want to use will then allow you to really narrow down the assets that you want to explore.

19:33
In this case, I already know that I want to grab this building's worth of of locations.

19:38
So I created and save the query.

19:41
Now you can do that do I would suggest doing that as well.

19:43
If you're dealing often with the same set of assets associated with some kind of parameters, save it off to the side so you can quickly access it and not have to rebuild it every time.

19:56
I'll execute this and here's my list of locations that I wanted to look at and export and make some changes too.

20:03
So at this this stage, if I like what I see, I can just export it to Excel.

20:08
When I export to Excel, I'm going to get the complete data set.

20:13
If I just say export file format again, I'm just going to get that header.

20:16
So let's take a look at what those look like.

20:19
So if I click if I click export to Excel, sorry, get the microphone.

20:24
It quickly dumps out all that data set and I actually have one shrunk down a little bit so we can look at it better.

20:31
So here you would see you get your asset tag, unique identifier and then the various fields that I have currently associated with that asset.

20:42
And we're not just limited to this set.

20:44
If you scroll over, there are a lot of data elements that you can manage.

20:51
Was that with asset sync about the asset?

20:55
So anything that is associated with that asset, all for these data elements would have exported during this process.

21:03
And then we have the various tabs across the bottom that then show us where the, you know, show us the data associated with those buckets.

21:14
And so if we look at PM templates here, I do have some PM templates associated with those assets I exported.

21:21
And just note, I only have about 18 PM templates here.

21:26
But I look at my asset list, I have 30 something assets.

21:29
So obviously some of those assets do not have APM template associated with it.

21:36
And then within this screen here, this is where we would add the PM template that we created last time and then set the date that we want that PM measured from.

21:47
Now, if we just did the template export, this is what we would get up for that.

21:53
And I zoomed in a little bit more to help that be visible.

21:56
So we get the same column structure, the same file format, the same ability to add data across across the the asset, but you also get definitions of what's expected for these different values.

22:12
So thinking of this as a template I'm going to hand off to somebody.

22:16
This then gives them a guidance to say I'm expecting these data values at at a maximum of these links for these fields.

22:26
OK, So what I have done is I've already kind of worked ahead here and I have a set sync template already filled out with some values.

22:38
And in this case, I have a few asset tags that are my rooms, my location.

22:43
I DS a couple of them already were in the system and it and when you export from the system, AIM tells you that no, this is not a new asset.

22:53
But these last these three I went ahead and added new and not have to I'm telling the system, yeah, these are coming in new.

23:00
So as As for the ones that exported the line items that exported it filled in the data for me that I needed.

23:07
So in the new for the new items, you would just use basic Excel functionality and go ahead and make sure you fill in the blanks.

23:15
Now I know not all the Gray fields aren't necessary, but since I have the value and I know it's the same for these assets, I went ahead and just copied it down and used it.

23:25
Now working with Excel, you know you can also drag numbers and sometimes numbers calculate.

23:30
So in this situation, are they sequence?

23:34
So in this situation, I'm kind of showing an example where maybe I did accidentally drag down and I sequence this next number and I'm highlighting it just because I want to show how the validation will work when we pull it back in.

23:47
From a location code perspective, it's not necessary, but I'm going to go ahead and relate this asset tag which is a room number to this location code because I do have that location associated to as a location in my property on the M temlate tab note.

24:06
I want to go back to this tab note I had these three new assets come in.

24:14
I'm going to head over to my PM template tab and included those 3 new assets.

24:19
Now the two existing assets I had already have APM template associated with it.

24:23
So I didn't work bring it over.

24:25
But if they were, if they didn't have APM template, you just include all the asset tags that you want to assign this template to and apply the temp apply that template ID.

24:36
So what I've done is I assigned the template ID that we created on the last session sort code, just gave it up the Z 01 sequence number.

24:47
Just I put a sequence number and I'm just sequencing through for this.

24:50
And then I put APM last date for March 1st, just to say that's my measurement point for going forward on the next work orders.

24:58
So in this case, I have the PMS that I want to associate.

25:02
I have the assets that I want to add and the assets I want to modify.

25:06
So let's go ahead and run an import.

25:11
So back in asset sync or back in AIM, I'm going to go to the asset sync import selection or screen.

25:21
I'm going to do a new one.

25:23
And here I'm going to call it demo import for inspection type that right?

25:42
And I'm actually going to put the building number that I'm working with too, just to just to have something I can refer to.

25:52
So I'm going to load my file.

25:54
So here's where I choose the file and there's my asset sync file.

26:04
And then now is my asset tag.

26:05
It's defaulting to letting aim.

26:07
So make sure you catch this.

26:09
Make sure that you change it to file.

26:11
So my file drives the asset tag unique identifier and I don't get an auto generated 1 instead of my room number.

26:18
So want that done.

26:19
Once that is completed, click save and it brings in those files.

26:24
So there's the six or the five that I had in my spreadsheet and notice a few of them came in that said new got to cut mine.

26:33
So I had my three new ones, but a couple of them look like they have something wrong.

26:37
And so one of them said it was updated and one of them said manual rework.

26:42
Well, that indicates that something needs to be changed to me manual rework, but I don't really know what based on this result.

26:49
But if I go to the error log, the error log will give me greater definition of what what I need to adjust.

26:56
And it's telling me my building code.

27:00
My building contains an invalid value.

27:01
So my value for that code is not right.

27:05
And it's even telling me it's back in my spreadsheet on the assets tab and it's Rd.

27:09
#2 that's got the problem.

27:13
So if that's that gives me good information to act on.

27:16
Now I know what I'm looking for.

27:19
So I go over here and now I've got all my my assets are in they're ready to be reviewed.

27:24
Now you, you could do it right here.

27:27
You could click on the asset that had an issue and work it right here.

27:32
Or let's say you get pulled off to a meeting or it's the end of the day and you don't really want to work on it right now.

27:38
It's OK, these are ready.

27:39
This will be sitting ready to for you to work on when you get availability to work on it next.

27:44
So I'm going to run that scenario and say it's end of the day and I left.

27:49
So I come back the next day and I know I got some review to do.

27:53
So I'm going to click on my review, which was just a query that I saved against this.

27:58
And here are those line items that I have to review.

28:01
And here are the ones that came in new.

28:03
But I do know I have this manual rework.

28:06
So I'm going to go ahead and click the manual, the asset link.

28:12
It's going to bring me into the system and bring me into the asset review screen.

28:16
Notice on the left hand side or values that we already that are already in the system, but on the right hand side are these values that may or they're different or maybe change.

28:26
And if you look down a little further here, you'll see this highlighted field that says my property is got an issue and kind of a flag on that is if you see a description underneath, then that value validated.

28:41
If you don't see descriptions, then values haven't validated.

28:44
So I need to adjust this building.

28:47
So if I go in here, it takes me to my building list and I'm going to go ahead and pick the right building and I'm going to finish it at that.

28:54
I'm not going to go down to the location, I'm just going to keep it to the building.

28:59
So at this point, my adjustment has been made.

29:01
I'm going to go up here now that I made that and it's no longer manual rework.

29:06
This isn't an update.

29:07
I have updated it.

29:09
And so now I'm going to save it.

29:13
Now I have update here and an update here.

29:15
If I want to look at that conference room update, remember I added the location to it.

29:20
If we look down here, it shows me that this location was added.

29:25
I already had these values, right?

29:26
So I added location.

29:28
It just let me know.

29:31
So at this point, all these, all these import, these asset sync imports are ready to go.

29:36
They're all, as long as there's not a manual rework state, you can then pull them in.

29:42
So I'm going to go ahead and select them all.

29:45
But if you didn't want to do that, you could select them individually and approve them individually as you were go through it.

29:50
You had a big list.

29:51
In this case, I'm not to do them all.

29:55
Now I'm good.

29:55
Nothing, nothing to review.

30:00
But if I go back and I look at these imports that I've done, I look at this, I look at this demo import that we just did, I'm going to click into it.

30:11
I can see these are the assets I brought in.

30:13
I can see this is the route.

30:14
They're all approved.

30:16
And if I go look at one of them, this is that same form that we saw earlier and it's in the approved state.

30:22
But if I notice over here, I had APM template associated with it and I could have looked at that when it was in the review state.

30:29
If I click that PM template, I now see that this template is associated to this phase.

30:35
And again, I can drill down and go to that PM template and this should start to look familiar because now we're in the PM template screen, go to that phase.

30:45
And if I look down here, now I see these three, these three rooms were added to this phase to as an asset to this phase.

30:56
And here's that start date that I entered March 1st O now I know that I have our deep clean C19 inspection associated with all these locations and ready to go, ready to go out in the field.

31:15
So I think that about sums it up as far as bringing them in and getting associated.

31:20
So let's head back to the presentation.

31:28
All right, so now we've got our inspections assigned to our multiple locations and one thing I didn't one thing I didn't mention, if you already have, did I say that?

31:38
Yeah, you already have locations associated with properties.

31:40
You can export those and then just copy your room I DS over as your asset tags.

31:46
So next week what we're going to do is start using the go asset management and start addressing these inspections.

31:53
So we'll doubt figure out how to download it from the App Store, get yourself, get us logged into it.

31:59
We're going to do, we're going to show how to access those inspections based on those locations, conduct them, address any of the remedial actions that we we've assigned to those tasks.

32:10
And then we can look at adding images and and notes to them.

32:14
And then we'll also look at how to create an ad hoc inspection in the field.

32:18
So this is where it all comes together again.

32:24
You know, it's a, it's a great partnership we're doing here with you.

32:27
We're really, I think giving you a good set of tools to to step out there and address those new conditions that we're working with, those new expectations are going to be holding us to.

32:37
And if you want to get greater detail about this or make sure you jump in and participate in this offer, contact either Randy or Keith.

32:46
And with that, that sums it up.

32:48
I think we're open for questions.

32:51
Yeah, Thanks, Shane.

32:51
I'll just add one thing.

32:52
It is and and I'm bringing up really a question that came up in one of the previous sessions.

32:58
As we kind of go through this, just keep in mind that the use case that we're suggesting here is really building off of what Alex Mauer from University of San Francisco kind of showed as part of their business process where they've actually barcode labeled or QR code labeled the actual door frame to the rooms.

33:20
And so they want their staff to be able to walk up to a door frame, be able to scan essentially a barcode or AQR code and be able to go right to that location and be able to conduct an inspection or inspections for that location.

33:37
So what we're what we're going through is this process of setting all that data up for you to be able to replicate that type of scenario.

33:46
So there's a couple things that are maybe a little bit different than sometimes we we focus on as part of our training, our best practices.

33:55
So normally with an asset that you know, Shane was pointing out the difference between the aim setting up the number for a new asset versus getting it from the file or having the file.

34:07
So in this particular use case, because oftentimes what's been labeled on the door frame is essentially the room number, which frequently is that kind of building ID dot or dash.

34:21
Then the the location code that it's a specific situation where we probably would be using that particular number that's already been defined as opposed to aim just assigning the next transactional number and being dependent on searching with all the other contextual data related to that.

34:42
So this is a little bit of a unique use case where we're defining locations essentially as assets so that we're then utilizing the location ID as the asset tag.

34:53
And we're doing, we're creating all these locations as assets so that we can then utilize the PM generator to generate all of these inspections in bulk on potentially a frequency basis.

35:06
So depending on what comes out of new compliance requirements related to COVID-19 that whatever that frequency ends up being, we're trying to give you all the tools so that you can do those cyclical type of events where it's more of a location based type of function and you can leverage the barcode scanning.

35:27
So a very specific use case that we're talking through here and educating you on how you can do the setup for, for that type of a business case.

35:39
That's a little bit different than the typical scenario when we're dealing with, let's say, mechanical assets and being able to do an HVAC style inspection for that.

35:49
So just keep in mind we're we're kind of walking you through a very specific use case related to response to the the current pandemic.

35:57
So yeah.

35:57
So with that, open up the questions.

35:59
Kevin, fire away.

36:03
All right, we've had a few come in.

36:05
Let me read this one and let me know if I need to read it again.

36:12
Can you use asset sync to export and develop mass date changes to existing PM templates with existing PM template assets with last dates?

36:26
Yes, instead of OK.

36:30
I mean, the question says instead of uploading new assets and their last dates to an existing template, say the last part again, Kevin, instead of uploading new assets and their last dates to an existing template, new assets.

36:55
I believe that that if I'm understanding the question correctly, it's yes.

36:59
So you can be used in both types of situations.

37:03
I can pull out existing data and the whole point of it is is you need to do bulk changes to asset data and you don't want to have to go through the records onesie twosies type of situation.

37:16
So you can take existing data out that where the assets are tied to the PM templates, go into that tab, change the date and then and then drag down to adjust that as well as you can have new assets that are being created that are being tied to PM templates or you can have existing assets that you want to tie to temp to PM templates.

37:40
So it should work in all those different types of scenarios.

37:44
That was part of the design intent of it.

37:48
OK, awesome.

37:50
Have a couple questions that are related to the format of date.

37:55
I'll go ahead and read one of these to you.

37:58
In the export import template.

38:00
Are the date fields pre formatted or does the user have to set up the date fields to a type that the software recognizes?

38:11
You know what Kevin, let's let's have that question documented and I'll have to talk to product management.

38:16
I don't know the answer to that one off the top of my head.

38:21
OK, there are a couple questions about date formats.

38:23
So what I want to validate is, as I believe that the field is identified as a date field, that whatever the format they use in Excel should be OK, and that we're then transforming it as part of the import process into the correct format that AIM expects.

38:41
But I want to validate that with the product team.

38:44
OK, excellent.

38:45
Sort of related, this is another question.

38:48
Will the software recognize Excel values as a result of an Excel formula function?

38:55
Or does the user have to flatten the formula function to actual values for the software to recognize?

39:05
You should be able to do formulas, right?

39:12
Excellent.

39:12
And you know, actually that's all I have queued up for questions right now.

39:17
So if you have other questions, submit them at this point.

39:26
Here we go.

39:27
Having a couple more come in.

39:34
What asset type and asset group would you suggest to use for the location asset?

39:42
We would suggest that you're using the asset type of property component and then the asset group can really be whatever you want.

39:50
And the bigger scenario, Shane used something that was very obvious, which was location, so that it matched up and you understood that when you looked at it that you're dealing with a location, OK?

40:05
What would cause the import process not to pull all asset group attributes?

40:16
Apparently somebody's had trouble and this is there.

40:18
Somebody is having a issue with it currently.

40:22
Yeah, and no error was indicated.

40:25
They submit that as a question, the customer care and they can trace that.

40:30
Yep, makes sense.

40:34
Let's see, can location information be exported from the property location module and imported back in as a property component in the master asset module?

40:50
So read that one again.

40:52
You read that one a little faster than my sorry.

40:55
Can location information be exported from the property slash location module and imported back in as a property component in the master asset module?

41:09
Yes.

41:09
That that was one of the things that is part of this that that Shane and I worked on is is you could go in, you do a search in the property management module on the the property profile on the location profile.

41:22
Most likely it's location profile is what you'd want since you're trying to get the locations out of it.

41:28
So you do the normal search function, the columns that you would want, region, facility, property, location, right?

41:34
Then you X, then you use the browse screen, export from the location profile detail to get that into Excel.

41:41
Now you can copy and paste that information into the asset sync template file and that way then you now have the baseline data to then go and create your asset tags off of that.

41:57
And product management did tag me back on this.

41:59
Is that the date format in Excel that we're expecting is MMM/DD slash YYYY, right?

42:08
So month, day, year associated with that numeric values.

42:20
I also got a note from a product that formulas were not tested, so it's a little bit of an unknown there.

42:36
OK.

42:40
All right.

42:40
Looks like that's it for the questions.

42:50
Yeah, I've had some other comments come in, but I think that's it for questions.

42:54
So any final words to wrap this up, guys?

43:02
Sorry I was on mute there.

43:03
Yeah, this this is Randy again.

43:06
I just want to thank everybody taking the time from their very busy schedules.

43:10
We know all of you guys are very, very, very busy right now during the the current dynamic times.

43:18
So we take, we really appreciate you taking the time to sit in on this session.

43:22
All these are being recorded so you can refer to them after the fact to to go through this process with that.

43:30
So we're hoping that all of you obviously personally stay safe and healthy.

43:36
We hope that your your organization is staying safe and healthy and that we'll we'll get through this process all together.

43:46
I will also give a little shout out that later today that we are having an additional webinar related to to COVID-19, not in the inspection kind of category, but more related to utilizing the Ready product suite and how that can be potentially leveraged during these dynamic and challenging times.

44:12
So if you have a chance or an opportunity to sit in on that one, I think that one's going to be really impactful as well.

44:19
We have Western Washington University, they'll be participating.

44:23
They'll talk about one of the use cases that they're using ready for as well as we'll have asset works product management team that'll talk about some inspirational ideas on how ready request can be utilized dealing with the the fallout of COVID-19, particularly around the higher education environment.

44:44
But I think a lot of these concepts can also be beneficial to our city, county, state agency customers as well.

44:52
So that's at 1:00 Central time.

44:54
If you, if you haven't got access to that, please feel free to check our COVID-19 Resource Center or reach out to Kevin can provide you information on that.

45:05
Or of course, you can always reach out to me as well, randy.walsh.source.com.

45:10
And I will make sure that you get an invitation to that.

45:12
It'll also be recorded and shared.

45:14
So if you can't make it today, don't worry, it'll the the information will still be accessible.

45:19
So again, thank you all and and we wish you the best and stay safe.

45:23
Yeah.

45:24
Thank you all for attending.

45:26
Yeah.

45:26
Thanks, Randy Shane for sharing your expertise.

45:30
And again, thanks everyone for taking time to join us today.

45:33
We'll see you on the next webinar.

45:35
Thanks a lot.