**Purpose:** Instructions for establishing, editing, and managing equipment & location information in PropertyTRAK

**Audience:** PropertyTRAK Administrators and Super-Users

**Add a New Property**

1. From the Properties tab on the left menu bar, select Create
2. Complete the “Create Property” screen as follows:
	1. Division – select the appropriate division
	2. Enter the Property Number - do not duplicate property numbers; see the below table:

|  |  |
| --- | --- |
| Building # | Building Name |
| 01 | Hospital |
| 02 | Specialties Clinic |
| 03 | To Be Assigned |
| 04 | To Be Assigned |
| 05 | To Be Assigned |

* 1. Enter the common Name of the facility, such as “Specialties Clinic”
	2. Enter the property’s physical address, including City, State, Zip Code, and Country
	3. Select the appropriate time zone
	4. Select the appropriate Coordinator, Facilities Coordinator, & Facilities Co-Coordinator
	5. Select the most accurate Building Type
	6. Enter all known square footage information and is applicable
	7. Identify Owned vs. Leased
	8. Select the Construction Type
	9. Enter Occupancy Information, if known and applicable
	10. Select Submit

**Edit an Existing Property**

1. From the Properties tab on the left menu bar, select List
2. Find the desired property to edit and choose “edit” from the “Select” dropdown field
3. Update/enter the information as indicated in the above steps, then select Submit

 **Add New Equipment**

1. From the Equipment tab on the left menu bar, select Create
2. Note fields in red are required
3. Enter the equipment’s common Name (e.g. “Air Handler #2” and “Kitchen Hood Exhaust #3”)
4. Enter the Asset Number per the below naming schema; make sure not to duplicate entries
	1. Asset number is comprised of “*Property # - Equipment Type – Component Type – Area Served/Function – Incremental #*” where
		1. *Property #* is as indicated in the above table
		2. *Equipment Type* per the below table

|  |  |
| --- | --- |
| **Code** | **System Type Description** |
| BLDG | Building Systems such as roof, wall, floor, door, etc. |
| ELEC | Electrical Systems including power generation and distribution |
| FLS | Fire/Life/Safety systems including fire protection, detectors, etc. |
| GRND | Grounds & Landscaping related equipment |
| GRND-IRR | Sub-System of GRND; Irrigation System |
| GRND-EQUIP | Sub-System of GRND; Equipment |
| HVAC | Heating/Ventilation/Air Conditioning |
| HVAC-CHW | Sub-System of HVAC; Chilled Water System |
| HVAC-DIST | Sub-System of HVAC; Distribution System |
| HVAC-HW | Sub-System of HVAC; Hot Water System |
| KIT | Kitchen related equipment such as walk-in freezers and hoods |
| MATL | Material Handling systems such as lifts, balers, etc. |
| PLB | Plumbing Systems |
| FLEET | Fleet Vehicles |
|  |  |

* + 1. *Component Type* per the below table

|  |  |
| --- | --- |
| **Code** | **Component Type Description** |
| AHU | Air Handler |
| ALARM | Alarm System (e.g. fire, security, etc.) |
| BFPV | Backflow Preventer Valve |
| BLWR | Blower |
| BLR | Boiler |
| CHLR | Chiller |
| CLR | Cooler (e.g. Walk-In Cooler) |
| CMP | Compressor |
| CND | Condenser |
| CRU | Computer-Room Air Conditioning Unit |
| DIST | Main Electrical Distribution |
| DRY | Air Dryer |
| DRYCLR | Dry Cooler |
| EF | Exhaust Fan |
| EXTIN | Fire Extinguisher |
| FIRE | Fire Suppression/Sprinkler System |
| FLEET | Fleet Vehicles |
| FRZ | Freezer (e.g. Walk-in Freezer) |
| GEN | Generator |
| HOOD | Hoods (e.g. kitchen, fume) |
| HTPMP | Heat Pump |
| ICE | Ice Maker |
| JACK | Pallet Jack |
| MC | Motor Controller |
| MOWER | Lawnmower or tractor |
| PMP | Pump |
| PNL | Electrical Panel |
| RLDOOR | Roll-up Door |
| ROOF | Roof |
| SNOW | Snowplow/Snowblower |
| TANK | Storage Tank such as hot water storage tank |
| TRAP | Traps (e.g. grease, steam, etc.) |
| TRIM | Lawn Trimmer |
| UNIT | Unitary Vents / Console Units |
| WH | Water Heater |
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* + 1. *Area Served/Function* is an abbreviation (limited to six characters) that describes the area the equipment serves (e.g. “LOBBY”) or distinct function (e.g. “HTG” for heating vs. “STM” for steam)
		2. *Incremental #* is simply an incremental count of equipment that has the same Property #, System Type, Equipment Type, and Area Served/Function; start with “01” and increase by one up to “99”
			1. Similar equipment that is of high quantities in the facility (e.g. fire extinguishers, VAVs, exhaust fans, etc.) which exceeds “99” should be further distinguished by area or function served.
				1. For example, VAVs can be separated by area/room served, such as 03-HVAC-VAV-LOBBY-07 and 03-HVAC-VAV-RM207-01
1. Select the appropriate Department; another Department can be created under the Administration left menu tab
2. Select the Assigned Property for the equipment; if equipment is located outside select the property that is closest
3. Select the Parent Equipment if the equipment is a sub-component to a larger system or equipment; the dropdown will show the other equipment located at the facility
4. Select Manufacturer; if Manufacturer does not exist, select Add New Manufacturer
5. Select Equipment Model; if model does not exist, select Add New Model
6. Select the Equipment Type that most closely matches; should be similar to that chosen for the Asset Number
7. Select the appropriate Cost Center
8. Enter the Serial Number, if known
9. Enter the Location, such as “North Mechanical Room” or “South Electrical Room” or specific room number
10. Staff Contact, if applicable, select the staff that has primary responsibility for the equipment
11. Floor – Hold for alternative use; Location should already designate floor
12. Enter Size of Equipment, if applicable, such as Tons, BTUs, Horsepower, etc.
13. Identify System or Area served; should align with designation in Asset Number
14. BacNet Name can be entered if known and desired
15. Select appropriate Status
16. Enter the Equipment Value; should reflect the original purchase price as of Start of Service Date
17. Start of Service should indicate the date the equipment was put into service; this field will help to determine replacement date and capital planning budget
18. Enter Warranty Expiration Date
19. Enter any other value added comments regarding equipment information, status, parts, etc.
20. Press “Submit” to save the equipment.

**Edit Existing Equipment**

1. From the Equipment tab on the left menu bar, select List
2. Apply filters to find the equipment that requires editing, if necessary
3. From the “Select” dropdown menu, choose “Edit”
4. Add/edit data as defined above and select “Submit” to save changes

**Attach Documents/Files to a Property**

1. From the Properties tab on the left menu bar, select List
2. Apply filters to find the Property to which files are to be attached, if necessary
3. From the “Select” dropdown menu, choose “Notes & Documents”
4. Three default folders currently exist
	1. Projects – Feature to be utilized at a later time
	2. User Groups – Feature to be utilized at a later time
	3. Equipment – provides a list of all equipment assigned to the specified property; select the desired equipment to see notes/files attached to that equipment
5. Create additional folders as desired to categorize files
6. Files can be saved in the main folder or in one of the created folders. To store note/file in a created folder, select the desired folder and follow the below steps.
7. To create a Note, select “New Note”
	1. Enter a Title for the note
	2. Enter desired text into the body of the note
	3. Hyperlinks can also be added to the note, if desired, using the Hyperlink button (looks like a chain link)
	4. When finished, select “Save Note”
8. To attach a file, choose “Upload” and select the desired file to be uploaded; then choose “Open”
9. Select the back arrow (next to the Upload button) to move up to the main folder and/or to return to the Properties List

**Attach Documents/Files to Equipment**

1. From the Equipment tab on the left menu bar, select List
2. Apply filters to find the equipment to which files are to be attached
3. From the “Select” dropdown menu, choose “Notes & Documents”
4. Create Folder as desired to categorize files (e.g. Construction Documents, Drawings, Specifications, etc.)
5. Files can be saved in the main folder or in one of the created folders. To store note/file in a created folder, select the desired folder and follow the below steps.
6. To create a Note, select “New Note”
	1. Enter a Title for the note
	2. Enter desired text into the body of the note
	3. Hyperlinks can also be added to the note, if desired, using the Hyperlink button (looks like a chain link)
	4. When finished, select “Save Note”
7. To attach a file, choose “Upload” and select the desired file to be uploaded; then choose “Open”
8. Select the back arrow (next to the Upload button) to move up to the main folder and/or to return to the previous Equipment List

**To View Notes/Files Attached to Equipment**

1. From the Equipment tab on the left menu bar, select List
2. Apply filters to find the equipment to which files are to be attached
3. From the “Select” dropdown menu, choose “Notes & Documents”

**To View Notes/Files Attached to a Property and Its Associated Equipment & User Groups**

1. From the Properties tab on the left menu bar, select List
2. Apply filters to find the Property to which files are to be attached, if necessary
3. From the “Select” dropdown menu, choose “Notes & Documents”
4. Three default folders currently exist
	1. Projects – Feature to be utilized at a later time
	2. User Groups – Feature to be utilized at a later time
	3. Equipment – provides a list of all equipment assigned to the specified property; select the desired equipment to see notes/files attached to that equipment
5. Open the destination folder, if necessary, and select the desired file/note

**Add Subcomponents to an Equipment**

1. From the Equipment tab on the left menu bar, select List
2. Apply filters to find the Equipment to which a subcomponent is to be added
3. Under the Subcomponents heading for the desired equipment, click “Add”
	1. Note if a subcomponent already exists for the equipment, select the number (which indicates the quantity of subcomponents currently associated with the parent equipment
	2. The equipment screen opens for the parent equipment and provides a list of subcomponents
	3. Select “Create” to add another subcomponent to the parent equipment
4. Enter subcomponent data using the steps listed above in “Add New Equipment”

**View Subcomponents of an Equipment**

1. From the Equipment tab on the left menu bar, select List
2. Apply filters to find the Parent Equipment
3. Under the Subcomponents heading, look for the number indicating the quantity of subcomponents associated with the specified parent equipment
	1. If the number is zero (“0”), then no subcomponents have been created for the parent equipment