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**Equipment Specification**

This step is required when the Equipment Specification does **NOT** exist for the new piece of equipment you wish to add.

If you already have the FIMS specification number, go to the [Steps for Creating a New Asset](#) section to begin the onboarding process.

### New Equipment Specification
**Create Equipment Specification Request**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Navigate to <em>Equipment</em></td>
</tr>
<tr>
<td>2.</td>
<td>First, search for a specification by entering Year, Manufacturer and Model filter values, then click the “Run” button or click the Enter key. When no records are returned, click on the “New Record” icon to create a new Specification.</td>
</tr>
<tr>
<td>3.</td>
<td>Enter the <strong>Equipment Specification Code</strong> (next consecutive number from the largest that exists) and <strong>Description</strong> in the format of: YEAR, MANUFACTURER, MODEL.</td>
</tr>
</tbody>
</table>
Create Equipment Specification Request

4. Complete all applicable fields.

**REQUIRED FIELDS:**
- Equipment Type
- Year
- Manufacturer
  If not found in the list, chose ‘UNKNOWN’ and enter the Manufacturer on the Comments tab.
- Model
- Equipment Status
  Choose the status which a generated asset will be created with, OPERATIONAL or OUTFITTING

**OPTIONAL FIELDS:**
- VIN / Serial No
  Enter the VIN for the new equipment. This is used for verification by the State office.
- Vehicle checkbox
  Check if
- Meter Unit
  Specify HR (hours) or MI (miles) for the meter this type of equipment.
- Replacement Criteria – Miles
  Specify the replacement criteria in miles, if known, for this type of equipment.
- Replacement Criteria – Years
  Specify the replacement criteria in years, if known, for this type of equipment.

Click “Save.”

5. Update Status to “REQUEST APPROVAL.”

Click “Save.”
Create Equipment Specification Request

6. Your specification requests status can be tracked using these inboxes.

7. After the State office reviews and approves the specification, it is then available for generating new equipment.

Steps for Creating a New Asset

Below are the activities that should be followed when adding a new equipment to the FIMS.

1. **Generate New Asset**: create the asset record
2. **Renumber Asset**: change the asset number
3. **Complete Asset Details**: complete the required and any optional fields
4. **Verify PM Schedule**: enter the due date for the first Vehicle Log (if necessary)
5. **Add Starting Meter**: enter a meter reading from the asset’s odometer reading (if necessary)
6. **Add Warranty**: enter equipment warranty (if necessary)
7. **Add Asset to Maintenance Pattern**: add equipment to a Maintenance Pattern to establish cycle for preventive maintenance service (if necessary)
8. **WEX Card Profile Setup**: if you are participating in the WEX integration and the WEX card is assigned to a specific vehicle, follow card “Vehicle ID” setup.

The sections below provide the detailed steps for completing each step of an asset set up.
### Generate New Asset

#### Create New Asset Record

1. Navigate to **Equipment | Equipment Generation**.

2. Complete the Equipment Details Section.

   Enter the **Specification** number or click on the lookup icon within the **Specification** field to locate it.

3. Enter the **Department** the equipment will be assigned to or click the lookup icon within the **Equipment Department** field and select the department from the pop-up list (use * if generating for multiple departments).
<table>
<thead>
<tr>
<th>4.</th>
<th>Create New Asset Record</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The Equipment Status</strong> defaults to OPERATIONAL. The other status available when setting up a new asset is OUTFITTING. Choose the appropriate value.</td>
<td><img src="image" alt="Equipment Status" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>5.</th>
<th>Enter the number of assets that will be created in the <strong>Generate Count</strong> field.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Click “Save” button.</strong></td>
<td><img src="image" alt="Generate Count" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>6.</th>
<th>The <strong>Commission Date</strong>, <strong>Equipment Org Code</strong> and <strong>Equipment Assigned To</strong> fields are optional.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>If you choose to enter values for these fields, all new assets that are generated will include these field values.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>NOTE:</strong> If you are generating more than one (1) asset, be sure these are the values you want on all the assets that are created. These can be changed when completing the asset set-up.</td>
<td><img src="image" alt="Commission Date" /></td>
</tr>
</tbody>
</table>
### Create New Asset Record

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
</table>
| 7.   | In the PM Schedules Details, enter the due date as the first day of the prior month.  
If your agency has system generated Vehicle Logs, the **Due Date Reference** value is used in the generate logs process.  
**Example:**  
- Asset Begin Service = 2/18/2020  
- Due Date Reference = 1/1/2020  
When the logs are generated for February, a Vehicle Log will be created for the new asset.  
Click “Save” button. |
| 8.   | Click “Create/Refresh Preview” button. |
| 9.   | Navigate to the **Details** tab.  
The **Details** tab allows you to enter a few asset details before the asset is created. |
| 10.  | Select the specification line and enter/update any of the optional information. |
| 11.  | Navigate to the **Preview** tab.  
The **Preview** tab will show each asset that will be generated and a few details about the new asset(s.) |
12. To generate the equipment, click the “Actions” menu and select “Generate Equipment.”

13. Once the equipment is generated, the Equipment (Asset) Number will be displayed.

   This number is generated by the system.

   **Note this equipment number for use in the subsequent steps.**

14. A new Asset record now exists for the new piece of equipment, but there are more Asset details that need to be completed! Move to the next section to continue the Asset set-up.
Renumber Asset

1. Navigate to Equipment | Assets.

2. Find the newly generated asset.
Enter the asset number in the Asset column filter and click the “Run” button or click the Enter key.

3. Double-click the row for viewing asset details (Record View.) Scroll to the bottom of the record and click the button labelled “Change Asset Number.”

4. The Change Asset Number pop-up will show you the asset’s current number. Enter the new asset number in the New Asset field and click the “Submit” button.
Complete Asset Details

1. Complete the Asset setup.

**REQUIRED FIELDS:**
- Status (defaults from spec)
- Division
- Department (defaults from spec)
- VIN / Serial Number
- Title Number
- FLAIR Property Number
- Org Code
- Equipment Type (defaults from spec)
- Assigned Use
- Commission Date – date the asset was purchased
- Begin Service Date – date the asset was put on the road. For assets created in OUTFITTING status, set the Begin Service Date to the Commission Date. When the asset status is changed to OPERATIONAL, change the Begin Service Date to the date the asset was put on the road
- Purchase Value
- Fleet Customer
  Enter ‘*’ (asterisk)
- Vehicle Status – choose “Available”
- City
- County
- Fuel Type

**SPECIAL OPTIONAL FIELDS:**
- Vehicle flag – when equipment type is on optional list, check this flag to require a log.

Click “Save” button.

2. The Asset record details are now complete, but there is still more to do! Move to the next section to set up the PM Schedule for the new Asset.
Verify PM Schedule

Verify PM Schedule (Meter Log)

**THIS STEP CAN BE SKIPPED IF YOUR AGENCY SUBMITS LOGS FOR UPLOADING. PM SCHEDULES DO NOT NEED TO BE SET UP FOR THE ASSET.**

In the FIMS, the PM Schedule is synonymous with the Vehicle Log. The log interval can be set to either monthly or yearly.

Those equipment specifications for equipment types on the required log list, a PM Schedule will be present when the asset is generated. Those equipment specifications for equipment types on the optional log list *will not have a PM Schedule.*

This [link](#) takes you to the end of the document for the Equipment Type where the log is required. This [link](#) takes you to the end of the document for the Equipment Type where the log is optional. If you wish to "require" a log for an asset with an optional equipment type, the Asset record’s **Vehicle** flag must also be checked.

The Asset with equipment types that logs are required and those Asset with equipment types that logs are optional and the **Vehicle** flag is checked will appear on the Missing Logs report.

1. Navigate to the **PM Schedules** tab.

   The **PM Schedules** tab shows the required frequency (monthly or yearly) for submitting the meter log for the asset.

   **If your agency is requiring logs for an optional equipment type, you must follow this set up so logs will be generated properly each month.**
Verify PM Schedule (Meter Log)

2. Click the “Add” button.
   Complete the PM Details.

**REQUIRED FIELDS:**
- **PM** – choose either annual or monthly
- **Agency** (defaults to user’s agency)

**OPTIONAL FIELDS:**
- **Department**
- **Due Date** – enter the first day of the month that the asset began service (Begin Service Date)

**Example:**
- Asset Begin Service = 2/18/2020
- Due Date = 2/1/2020

Click “Save” button.

3. The PM Schedule is now present and active for the asset.

4. The asset PM Schedule set up is now complete, but there is still more to do! Move to the next section to set up the starting meter for the new asset.

---

Add Starting Meter

Add the Starting Meter Reading

1. Navigate to the *Meters* tab.

   The *Meters* tab shows the highest reading (Standalone) and meter history for the asset
## Add the Starting Meter Reading

### 2.
If the initial meter reading record already exists, go to Step 7.

To add the initial meter reading, click “Add” button.

- Enter the **UOM** value = MI or HR.
- Leave the **Type of Meter** value = ‘Standalone’
- Enter the **Usage Since Install** = 0

Click “Save” button.

Note: The initial meter reading can be found on the Certificate of Origin or from the HSMV Vehicle Registration.

### 3.
Select the Standalone meter by clicking on the row.

### 4.
Click on the “Actions” menu and choose the “Enter Meter Reading” option.

### 5.
The **Add Meter Reading** screen appears.

- **Entry Type** – set to ‘Reading’
- **Date/Time** – defaults to current date
- **Value** – update with the asset’s initial odometer reading.

Click “Submit” button.

Note: The initial meter reading can be found on the Certificate of Origin or from the HSMV Vehicle Registration.
## Add the Starting Meter Reading

6. The meter just entered now appears as the latest or Standalone meter.

7. The asset starting meter has now been added.

If a warranty is available for the new asset, move to the next section for steps to add a warranty.

If no warranty is available, move to the last step in the asset set up process, Maintenance Pattern – Add Asset section.

## Add Warranty

**Associating a Warranty to an Asset**

1. Navigate to **Warranties** tab.

   The **Warranties** tab shows all warranties for the asset.

2. Click “Add” button.

   Complete the Warranty Details.

   **REQUIRED FIELDS:**
   - **Warranty** – choose the warranty using the Search button. If the warranty does exist in the list, contact the Fleet Help Desk to request it be added.

   Click “Save” button.

3. The asset Warranty set up is now complete! Last step in the set-up process is to add the asset to a Maintenance Pattern for regular preventive maintenance.
Add Asset to Maintenance Pattern

1. From main menu, navigate to Work | WO Planning | Maintenance Patterns.

2. Select the Maintenance Pattern that aligns with the equipment manufacturer recommendation.

3. Click Equipment tab.

4. In the Equipment Details section, enter the number for the new asset that was just created in the Equipment field.

Click “Save” button.
5. Click “Actions” and “Activate MP” to activate the equipment for the chosen Maintenance Pattern.

6. On the **Activate MP** screen, complete the following fields:
   - **Initial Sequence** – defaults to first MP sequence.
   - **Due Date** – enter the date when the first PM service will be due.
   - **Meter #1 Due** – enter the meter when the first PM service will be due.

   **Example:**
   - MP - 4 MO / 4000 MI
   - Asset Begin Service = 2/12/2020
   - Asset Begin Meter = 0
   - First PM service due in 4 months or 4000 miles

   Enter Due Date = 6/12/2020
   Enter Meter #1 = 4000

7. The MP Equipment now appears ‘Active’ with the Due Date and Meter #1 interval entered in the previous step.

8. When the asset is successfully added to a Maintenance Pattern, the system generates an OPEN PM work order for the next scheduled maintenance.

   Navigate to **Work | Work Orders** to see the newly created work order

9. You have completed creating a new asset.
If you are participating in the WEX integration and the WEX card is assigned to a specific vehicle. The WEX card profile field, **Custom Vehicle/Asset ID**, **MUST MATCH** the FIMS **Asset ID**.
## Equipment Type – Log Required

<table>
<thead>
<tr>
<th>Equip Type</th>
<th>Description</th>
<th>Equip Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIRBOAT</td>
<td>AIRBOAT</td>
<td>MOTOHOME</td>
<td>MOTOR HOME</td>
</tr>
<tr>
<td>AIRCRAFT</td>
<td>AIRCRAFT</td>
<td>PICKUP</td>
<td>PICKUP</td>
</tr>
<tr>
<td>AIRPLANE</td>
<td>AIRPLANE</td>
<td>PICKUPLP</td>
<td>PICKUP (LE PATROL)</td>
</tr>
<tr>
<td>AMBULANC</td>
<td>AMBULANCE</td>
<td>PICPURST</td>
<td>PICKUP (LE PURSUIT)</td>
</tr>
<tr>
<td>ARMVEHIC</td>
<td>ARMORED VEHICLE</td>
<td>SEDAN</td>
<td>SEDAN</td>
</tr>
<tr>
<td>BOAT</td>
<td>BOAT</td>
<td>SEDPTRL</td>
<td>SEDAN (LE PATROL)</td>
</tr>
<tr>
<td>BUS</td>
<td>BUS</td>
<td>SEDPURST</td>
<td>SEDAN (LE PURSUIT)</td>
</tr>
<tr>
<td>CARHAULR</td>
<td>CAR HAULER</td>
<td>SHUTTLE</td>
<td>SHUTTLE</td>
</tr>
<tr>
<td>CARRYTRK</td>
<td>CARRY TRUCK</td>
<td>SUV</td>
<td>SUV</td>
</tr>
<tr>
<td>CHASICAB</td>
<td>CHASSIS-CAB (&lt;=10000 LB GVWR)</td>
<td>SUVPATR</td>
<td>SUV (LE PATROL)</td>
</tr>
<tr>
<td>COUPE</td>
<td>COUPE</td>
<td>SUVPURST</td>
<td>SUV (LE PURSUIT)</td>
</tr>
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<td>FIRE TRUCK</td>
<td>TRUCK</td>
<td>TRUCK</td>
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<td>HELICOPTER</td>
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<td>HATCHBACK</td>
<td>MOCYC</td>
<td>MOTORCYCLE</td>
</tr>
<tr>
<td>HVYDTY</td>
<td>HEAVY DUTY (=OR&gt;26001 LB GVWR)</td>
<td>MOCYCLP</td>
<td>MOTORCYCLE (LE PURSUIT)</td>
</tr>
<tr>
<td>HVYDTYBS</td>
<td>HEAVY DUTY BUS (=OR&gt;26001 LB GVWR)</td>
<td>MOTOHOME</td>
<td>MOTOR HOME</td>
</tr>
<tr>
<td>HVYDTYSB</td>
<td>HEAVY DUTY SCHOOL BUS (=OR&gt;26001 LB GVWR)</td>
<td>PICKUP</td>
<td>PICKUP</td>
</tr>
<tr>
<td>LTDUTY</td>
<td>LIGHT DUTY (10001-14000 LB GVWR)</td>
<td>PICKUPLP</td>
<td>PICKUP (LE PATROL)</td>
</tr>
<tr>
<td>LTUTILVE</td>
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<td>PICKUP (LE PURSUIT)</td>
</tr>
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<td>MEDDTY</td>
<td>MEDIUM DUTY (14001-26000 LB GVWR)</td>
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<td>MEDDTYBS</td>
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<td>Equip Type</td>
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<td>SEED ROLLER</td>
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<tr>
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<td>GENERATOR</td>
<td>SHAKER</td>
<td>SHAKER</td>
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