Adding a New Component in Facilities 7

Adding a new component to your reserve study is very easy. Just click on the "New Component" selection in the Main menu, and it opens a "New Reserve Item" dialogue box. This lets you either create the new reserve item manually, Import form Excel, or make a Master List Selection. If you're adding just a few new items, enter them manually. If it is a large group, then importing from Excel is a better option. The Master List Selection is available only on Master Licenses.

Click "OK" to enter the single new reserve component.

This opens the New Reserve Item add screen. The steps you need to take to add the component are:

In the common area logistic portion of the screen

1) add the description
2) select a category from the drop down list, or create a new category
3) insert estimated useful life
4) enter the measurement basis (such as square foot, each, square, etc.
5) enter the basis cost
6) for "Tracking" the default assumes "1" for a single item. If you have multiple identical components that you wish to track, just enter the number of them and the screen expands for the number of items entered
7) "Method" is "Fixed" by default, and the other choices are "Adjusted" or "One Time"

In the "Component Data" portion of the screen

1) Enter the "Service date" (Date placed in service) – The default date is the "Initial Date" of the project.
2) "Replace Date" defaults to "Service Date" plus estimated useful life. Modify if necessary
3) Enter Quantity – current and future cost are calculated automatically

See next page to see how to enter notes and images

If you later need to make changes to any reserve item, just double click from the work area screen and it will open the Reserve item Edit/Delete screen, which is virtually identical to this New Reserve Item screen.

To insert narrative notes and images, you need to select "Item Notes" from the "View menu." This opens the "Report Note" screen as shown below. Then, just start typing to enter in any narrative you want, or copy and paste from anopther document.

To insert images, you must be on the item note screen. Click on "Import New Image" from the Note Editor menu, and the "New Item Image" screen opens. The image name automatically defaults to the component name. Click "Browse" ant the bottom of the screen, find your image, and it will appear in the window. Click "Save" to save the image and close the New Item Image screen.
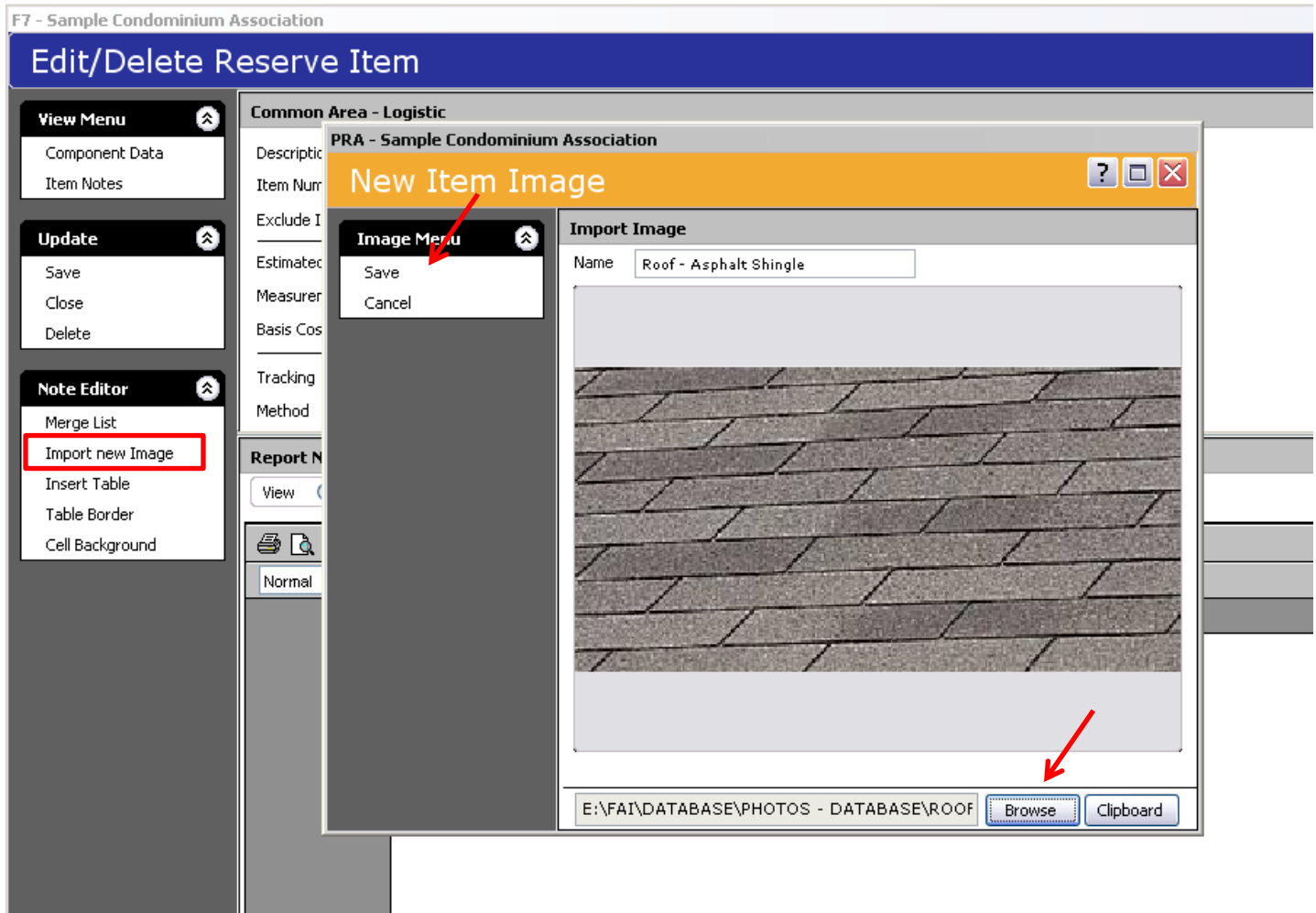
The "Image" appears as HTML text on the Item Note screen.

See next page to see how to view image. Even though the default appears as HTML text here, any report including photos will automatically merge the image so that it appears as a normal photo.

Merged Image on Item Note screen.

Edit/Delete Reserve Item

View Menu ⊗

Component Data
Item Notes

Update ⊗

Save
Close
Delete

Note Editor ⊗

Merge List
Import new Image
Insert Table
Table Border
Cell Background

Common Area - Logistic

Description	Roof - Asphalt Shingle	Category	Roof
Item Number	10	NA	
Exclude Inflation	☐		

Estimated Useful Life   35:00
Measurement Basis   Square
Basis Cost   67.000

Tracking   Single Item   1
Method   Fixed

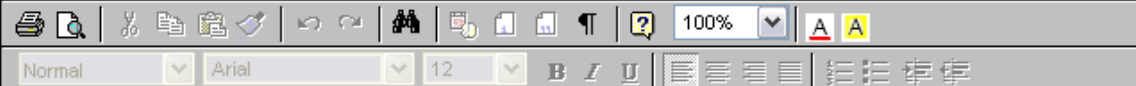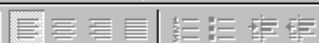## Report Note

View   ○ Template   ● Merge

Normal   Arial   12   **B** *I* U

Roof is asphalt shingle with a 30 year warranty