AIMS Equipment Request Process

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1 Purpose

This document describes the process which is to be used to request the creation of new Equipment Types, requesting to use existing Equipment Types, request for the generation of batch and serial instances, supply of Serial item metadata and relate MCRs to existing Equipment Types within the Asset Information System (AIMS).

This revision of the process has incorporated feedback from users to improve the overall effectiveness of the process and to added clarification where required. The main change to the process is the separation of the collection of serial item metadata from the ERF form into its own form reducing the ongoing processing of separate ERFs into a single serial item form.

2 Scope

This process relates to the management of Equipment Types and batch/Serial items within the AIMS system.

Further detailed information on Equipment, Batch/Serial Items and Categorisation can be found in the eB document: CRL1-XRL-Z3-GUI-CR001-50028 '*AIMS Equipment Guidance Document*'

This document is split into two main sections; ERF process and SIMS Process

2.1 Equipment Types

Equipment Types are identified within the AIMS system in a number of ways:

- They are of the Physical Item object type;
- They have the prefix of EQ on the Equipment Type code.

Equipment Types will always have the following associated information held against them within the AIMS system:

- The Manufacturer
- The Asset Class
- The Make/Model
- Equipment Description

The primary purpose of Equipment Types within AIMS is to allow for the recording of which Equipment Type (Make and Model) have been used to fulfil an Asset Tag requirement.

Equipment Types can only be installed against an asset tag which has the same class as itself.

Equipment Types will be allocated to one or more contracts and only these contracts will be able to use them. The same equipment type can be used by more than one contract.

2.2 Batch/Serial Items

Batch and Serial items are identified within the AIMS system in a number of ways:

- They are of the Serialized Item object type;
- They have the prefix of SB for Batches and SN for Serial Items.

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Batch and Serial items will always have the following associated information held against them within the AIMS system:

- The Equipment Type.

The primary purpose of Batch/Serial Items within AIMS is to facilitate traceability of instances of equipment which have been installed at a specific location i.e. used to fulfil an Asset Tag requirement.

Batch and Serial items are uniquely identified within AIMS by the concatenation of the SB/SN number and the EQ Number i.e. EQ00000001 + SN-00001.

Batch and Serial items will have a manufacturer serial/batch ID number recoded against them and can optionally have a contractor ID number recorded against them.

Each unique batch/serial item will be allocated to a contract and only that contract will be able to use it.

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3 Definitions

For a full list of common Asset related terms see the Crossrail Asset Information Glossary (eB document CRL1-XRL-Z3-GUI-CR001-50012).

Terms/acronyms specific to this document are listed below:

Acronym	Name	Description
ACT	AIMS Configuration Team	CRL Team that manages the review of AIMS related potential configuration changes and implementation of approved changes.
ET	Equipment Type	A type of object in the AIMS (eB) database used to represent a make and model of equipment (CAT 1)
MCF	Manufacturer Change Form	A form used in the creation of manufacturers within AIMS
	Batch/Serial Item	An AIMS object used to represent unique instances or batches of equipment within AIMS
AIT	Asset Information Technician	Members of the CRL Asset information team who act as the liaison between CRL and Contractors
SIMS	Serial Item Metadata Schedule	A schedule used to capture metadata against created serial items within AIMS
MCR	Material Compliance Record	The documentation relating to the use of equipment on Crossrail
OEM	Original Equipment Manufacturer	The manufacturer of the equipment

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4 ERF Process

4.1 Equipment Request Description

The following process should be followed for the request of new equipment types to be created in AIMS, for the approval to use existing equipment types already held in AIMS, for the generation of Serial and Batch ID's within AIMS and for relating an MCR to an existing ET.

Any requests which are raised must be done via the AIMS Equipment Request Form (eB Document Number: CRL1-XRL-Z3-ZTM-CR001-50006) in line with the request types previously detailed.

4.2 Process Timeframes

The AIMS Configuration Team (ACT) will always endeavour to process Equipment Requests Forms in as shortest time as possible; the following lists the target times for the different types of requests when submitted on a correctly validated ERF (processing will be dictated by the greatest request timeframe on a single ERF).

Equipment Request Type	Timeframe (full working days)
New Equipment Request	5
Request to use Existing Equipment Type	5
Generation of Batch/Serial IDs	10
MCR Relation	5

4.3 Types of Equipment Requests

There are a number of different types of requests which can be raised by this process and dependent on the type of request a different set of information will be required.

If Serial or Batch items are requested the SIMS process will be followed to capture additional information required

The following details the purpose of and the information requirements for each of the request types which the Equipment requestor supplies:

<u>Double Underlined</u> text refers to the column group name in the Equipment Request Form (ERF) (eB Document Number CRL1-XRL-Z3-ZTM-CR001-50006).

<u>Underlined</u> text refers to the column name in the Equipment Request Form (ERF).

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All submitted ERF's should have the Request Details section of the cover sheet completed and it is acceptable for one ERF to contain requests of all four types populated. A Contractor form number should be entered to allow for easier traceability on submitted forms.

4.3.1 All requests

- Purpose
  - This information can be used on any requests but is most applicable to new ET requests.
  - This information is not mandatory but should be used in specific circumstances.
- Required Information
  - <u>Contractor Details</u>
    - <u>Further Information</u>
      - This section should be used to supply further information about a requested ET when it is unusual i.e. when the ET being requested is an assembly or bespoke.
    - <u>Comments</u>
      - This section should be used to respond to comments raised by the ACT.
      - This section can also be used to record comments when first submitting the ET request if it is felt these would aid in the creation of the ET in AIMS.

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4.3.2 New Equipment Type

- Purpose
  - This type of request is to be used for the creation of a new ET into AIMS which does not already exist.
  - When requesting a new ET a requestor can also request for Serial/Batch items to be created against the requested ET.
- Required Information
  - Template Details
    - Request Type
      - For this type of request the value 'New ET' should be selected
  - Asset Class Details
    - Code
      - The L Code of the Asset Class the ET can be allocated against
  - Manufacturer Details
  - Existing
    - Code
      - The Manufacturer code as held in AIMS
  - New (Only when Existing code cannot be populated)
    - Name
      - The name of a manufacturer which is not currently within AIMS
        - *The AIMs System Team will complete a MCF on behalf of the requestor which will be sent to the requestor on completion.*
  - Equipment Details
  - New
    - Model/Type
      - The model number by which the equipment is known by the manufacturer.
    - Description
      - The description of the equipment which would be used to identify it e.g. FP McCann Ltd – Precast Concrete Drainage Inspection Chambers - HCD F4-2a (1500mm).
      - The description should follow the format of:
        - <Manufacturer Name> - <What it is> - < Distinguishing Features/Model>
    - Equipment Category
      - Select the equipment category that the new ET is being requested as; if this is different than the provisional categorisation for that class justification may be sought through the Asset Information Technician.
        - See eB report AIM-EQP-0002 for class provisional categorisations.
  - Relationships
    - eB MCR Number

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        - The eB MCR number which has been submitted/Accepted by CRL for use of the ET on Crossrail. If no eB MCR has been submitted for the ET then the value NONE should be entered.
- Serial/Batch Creation
    - Quantity Required (Only when Batch or Serial Items are being requested)
        - The number of Batch or Serial items which are being requested; each of these items will be allocated an SB/SN number.

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4.3.3 Request to Use Existing ET

- Purpose
  - This type of request is to be used to request to use an existing ET on a contract where the ET is already held in AIMS.
  - When requesting to use an existing ET a requestor can also request for Serial/Batch items to be created against the ET.
- Required Information
  - Template Details
    - Request Type
      - For this type of request the value 'Use Existing' should be selected
  - Equipment Details
  - Existing
    - EQ Number
      - The EQ Number of the ET the requestor is applying to use on their contract.
  - Relationships
    - eB MCR Number
      - The eB MCR number which has been submitted/Accepted by CRL for use of the ET on Crossrail. If no eB MCR has been submitted for the ET then the value NONE should be entered.
  - Serial/Batch Creation
    - Quantity Required (Only when Batch or Serial Items are being requested)
      - The number of Batch or Serial items which are being requested; each of these items will be allocated an SB/SN number.

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4.3.4 Request for Serial & Batch IDs

- Purpose
  - This type of request is to be used to request batch or serial IDs against an existing ET already held in AIMS which the contract is already approved to use.
  - If the contract has not yet been approved for use on the ET, a use existing ET request should be used supplying the required serial items on that request.

- Required Information
  - Template Details
    - Request Type
      - For this type of request the value 'Serial Request' should be selected
  - Equipment Details
  - Existing
    - EQ Number
      - The EQ Number of the ET the requestor is requesting the serial/batch IDs against.
  - Serial/Batch Creation
    - Quantity Required
      - The number of Batch or Serial items which are being requested; each of these items will be allocated an SB/SN number.

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4.3.5 Request to Relate ET to MCR

- Purpose
  - This type of request is to be used to request an MCR is related to an existing ET previously created/requested for use on a contract which did not have an available MCR number at the time of the original request.
- Required Information
  - Template Details
    - Request Type
      - For this type of request the value 'MCR Relation' should be selected
  - Equipment Details
  - Existing
    - EQ Number
      - The EQ Number of the ET the requestor is requesting to relate the MCR to.
  - Relationships
    - eB MCR Number
      - The eB MCR number which has been submitted/Accepted by CRL for use of the ET on Crossrail.

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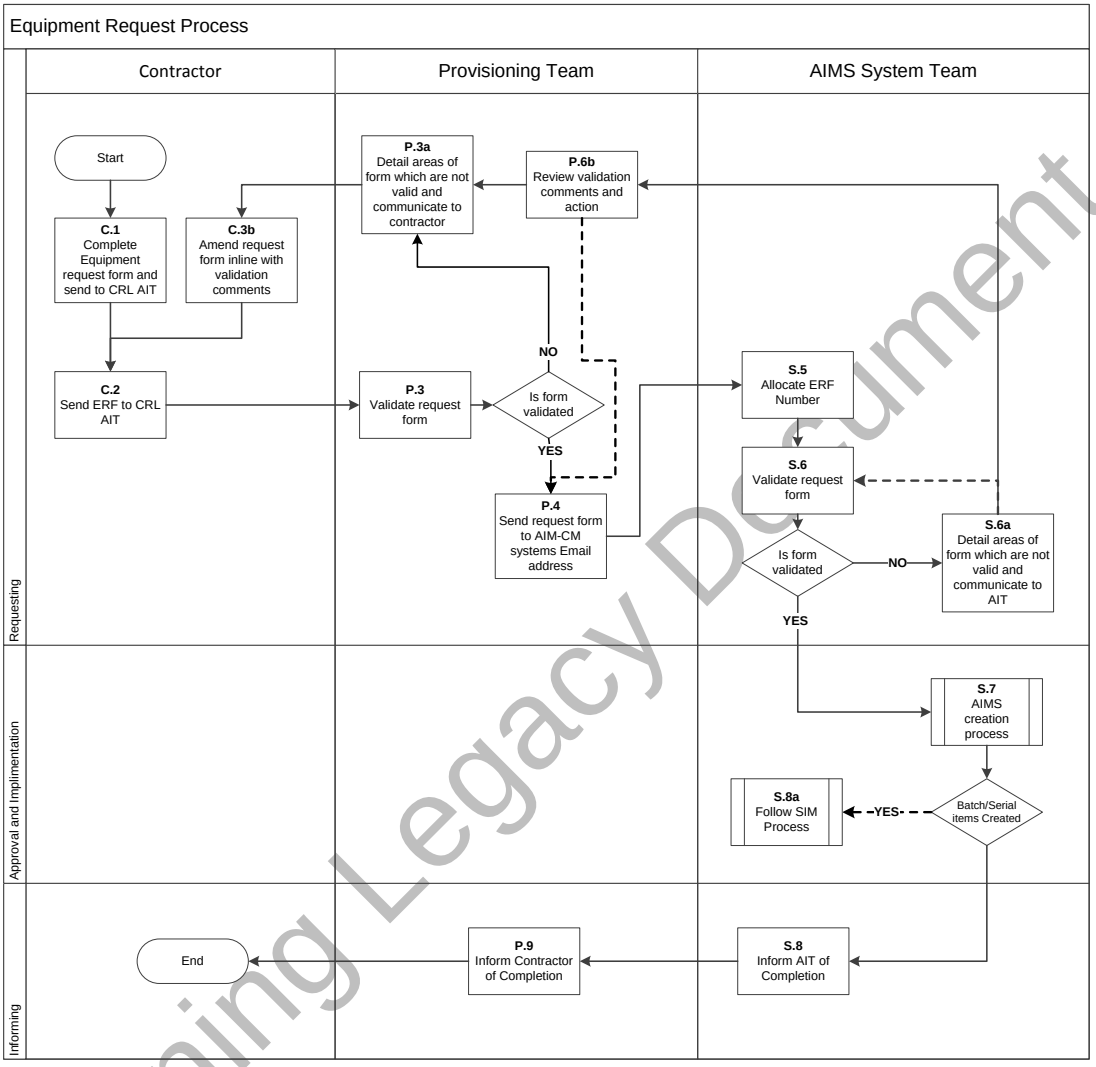
4.4 Process Diagram



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4.5 Process Steps

Steps prefixed C, are performed by the contractor.

Steps prefixed P, are performed by the AIT.

Steps prefixed S, are performed by the ACT.

Steps suffixed with a letter form part of an optional step which may not need to be performed in all cases.

4.5.1 C.1 Complete Request Form

The contractor completes the ERF in line with the type of request. Only values under yellow headings should be completed (Items in red are completed by the ACT or automatically populated)

4.5.2 C.2 Send Request Form

The contractor sends the ERF to the applicable AIT

4.5.3 P.3 Validate ERF

The AIT will validate the ERF with (but not limited to) the following checks:

- For new requests a check will be performed to ensure that the equipment type doesn't already exist within AIMS
- For new requests a check will be performed to ensure that the equipment is being allocated against the correct class.
- For requests to use existing equipment types a check will be performed to ensure that the equipment type is valid for the contracts work.
- Where a request does not follow the provisional categorisation the contractor alternative will be reviewed and assessed.
- Where a request includes Serial/Batch ID's that the request follows the correct categorisation.

4.5.4 P.3a Detail Validation Issues

Where any of the validation checks fail the AIT will detail the reason for failure into the ERF and depending on the level of failure will either contact the contractor by email to check the details which have been entered on the ERF, or for more serious failures will return the ERF to the contractor asking for the form to be amended.

If a contractor has requested an alternative categorisation which the AIT does not accept this will be communicated back to the contractor and the ERF will continue to be processed in line with the provisional categorisation.

4.5.5 C.3b Amend ERF

When an ERF is returned to the contractor due to significant validation failures, the contractor must correct the form in line with the supplied comments and resubmit the ERF.

No new requests should be added to the ERF, these should be raised on a new ERF. If new requests are added onto the ERF they will not be processed by the ACT.

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4.5.6 P.4 Send Request Form

The AIT sends the ERF to the ACT via the systems team email address:

AIM-CMSystems@crossrail.co.uk

The AIT should put ERF in the subject of the email to allow for quick identification on receipt.

4.5.7 S.5 Allocate ERF Number

The ACT will allocate the next available ERF number to the form and log the form in the register.

4.5.8 S.6 Validate ERF

The ACT will validate the ERF with (But not limited to) the following checks:

- For new requests a check will be performed to ensure that the equipment type doesn't already exist within AIMS
- For new requests a check will be performed to ensure that the equipment is being allocated against the correct class.
- For requests to use existing equipment types a check will be performed to ensure that the equipment type is valid for the contracts work.
- Where a request does not follow the provisional categorisation the contractor alternative will be reviewed and assessed.
- Where a request includes Serial/Batch ID's that the request follows the correct categorisation.

4.5.9 S.6a Detail Validation Issues

Where any of the validation checks fail the ACT will detail the reason for failure into the ERF and depending on the level of failure will either contact the AIT by email to check the details which have been entered on the ERF, or for more serious failures will return the ERF to the AIT asking for the form to be amended.

If a contractor has requested an alternative categorisation which the ACT does not accept this will be communicated back to the AIT and the ERF will continue to be processed in line with the provisional categorisation.

4.5.10 P.6b Amend ERF

When an ERF is returned to the AIT due to significant validation failures, the AIT can either correct the form in line with the supplied comments and resubmit the ERF or send the ERF back to the contractor for correction (P.3a).

No new requests should be added to the ERF, these should be raised on a new ERF. If new requests are added onto the ERF they will not be processed by the ACT.

4.5.11 S.7 AIMS Creation Process

The ACT processes the validated ERF into AIMS.

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4.5.12 S.8 Communicate Completion

Once all validated requests on the ERF have been completed the ACT will send a completed ERF back to the AIT by email. The completed ERF will contain the applicable IDs which have been allocated.

4.5.13 S.8a SIM Process

If the processed ERF contained serial items to be created the SIM process should also be followed.

4.6 Points of Note

The following points cover the entire ERF process and are aimed at providing further clarification on various parts of the process. It also covers some basics on how to deal with unusual equipment types (if in doubt always consult with the AIT/ACT for a workable solution)

4.6.1 Bespoke Items

Items which are seen as bespoke will still require a model number recording against them. This information should allow for identification of that type of item with whoever manufactured the item. This may take the form of a type or a drawing number i.e. Type A or 13403.

If a 'Bespoke' item is being requested by the contractor, further information should be populated explaining what the model number refers to (i.e. Bespoke item, model number refers to Manufacturer drawing number). The contractor comments section should also be populated with any information that helps justify why the requested item is bespoke. Where practical evidence to support the request should be provided as this will expedite the validation/processing of the request.

If in doubt always consult with the AIT/ACT for a workable solution

4.6.2 Assembly Items

An asset tag can only have a single ET recoded against it, which in some situations is not achievable as the asset tag is fulfilled by a number of different models of equipment. To facilitate these assets, ET assemblies can be created. ET Assemblies are ETs made up of a number of equipment models combined (all should be from the same manufacture). In these situations the model number used should be a combination of the included models and the further information should be populated to describe the scope of the assembly. An ET of this type should only be used where all of the component parts are in use for that asset.

The contractor comments section should also be populated with any information that helps justify why the requested item is an assembly.

An example of an assembly ET is for an asset tag representing pipework which includes a number of different bends and strait sections.

If in doubt always consult with the AIT/ACT for a workable solution

4.6.3 Models

All ET must have a model number recorded against them. Contractors should ensure that the information provided relates to a specific model and not to a range of models (subject to Bespoke/Assembly items)

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4.6.4 Descriptions

Descriptions provided should always follow the mandated format of < Manufacturer Name> - <What it is> - < Distinguishing Features/Model>

e.g. FP McCann Ltd – Precast Concrete Drainage Inspection Chambers - HCD F4-2a (1500mm).

4.6.5 Further information

When required to populate further information a contractor must ensure that the information provided provides a clear description of the ET special features in line with the type of item being requested.

4.6.6 Provisional Categorisation

The provisional equipment categorisation of an asset class is the expected level of equipment which will be recorded against asset tags of that class.

Contractors can choose to request ET to be created which is not in alignment with the asset class's provisional categorisation but will then be required to provide justification of the requested category.

This justification should be entered into the contractor details section under the comments header. Failure to provide a clear justification can potentially delay the creation of the ET for use by the contract

4.6.7 ERF Lifecycle

Once an ERF has been initially submitted for processing by CRL it should not be altered in any way other than detailed in applicable comments. No new items should be added to an ERF (a new ERF should be used) as this will delay the processing of the ERF.

Once all items on an ERF have been processed the ERF lifecycle is closed for that specific ERF number.

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5 SIMS Process

5.1 Serial Item Metadata Description

The Serial Item Metadata process uses the Serial Item Metadata Schedule (SIMS) to allow for a contractor to provide information against serial numbers which have previously been created via an ERF.

This process should be followed to supply and update metadata held against Serial Items.

5.2 SIM Process Timeframes

The AIMS Configuration Team (ACT) will always endeavour to process SIMS in as shortest time as possible; the following lists the target times for processing correctly populated SIMS

SIMS Processing Action	Timeframe (full working days)
Processing a populated SIMS into AIMS	5
Production of a new iteration of a SIMS	5

5.3 SIM Requests

The SIMS template is produced at a contract level and should be used after Serial items have been created via an ERF, its purpose is to capture metadata that is to be recorded against serial items.

The following details the purpose of and the information requirements for the data that can be collected.

After the first iteration of a contracts SIMS has been produced further iterations will only be produced once the previous iteration has been returned to the systems team for processing.

Double Underlined text refers to the column group name in the Serial Item Metadata Schedule (SIMS)

Underlined text refers to the column name in the Serial Item Metadata Schedule (SIMS).

SIMS information

- Purpose
  - This process is used to capture contractor and manufacture batch/serial IDs against the previously created CRL batch/serial items.
  - This process will be utilised after any ERF has been processed which resulted in batch/serial items being created
- Required Information
  - Serial/Batch Details

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- Contractor ID
    - The ID number used by the contractor in their systems/documentation to identify the item.
        - The supply of Contractors batch/serial IDs is optional but should be supplied whenever available. Whilst this information is optional it is recommended as it will assist in future analysis/reporting by both CRL and Contractor.
- Manufacturer ID
    - The manufacturer (OEM) Batch/Serial ID used to identify the item
        - The supply of manufacture batch/serial IDs is mandatory
        - The supply of manufacture batch/serial IDs shall be supplied no later than 4 weeks prior to installation.
        - The ACT will by agreement accept early, progressive supply of both contractor and manufacturer IDs

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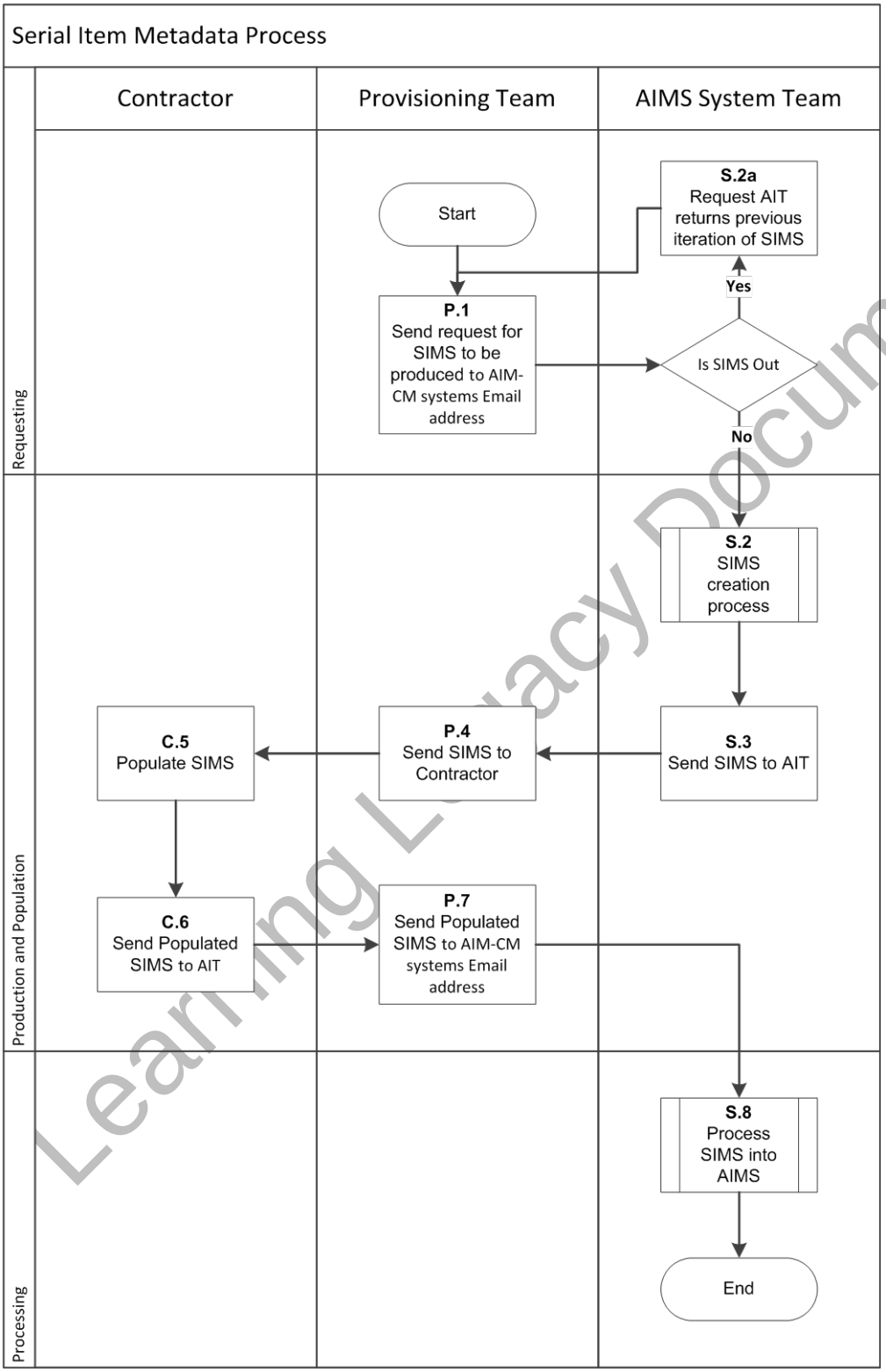
5.4 Process Diagram



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5.5 Process Steps

Steps prefixed C, are performed by the contractor.

Steps prefixed P, are performed by the AIT.

Steps prefixed S, are performed by the ACT.

Steps suffixed with a letter form part of an optional step which may not need to be performed in all cases.

5.5.1 P.1 Request SIMS Creation

The AIT will request for a SIMS to be produced for a specific contract. The AIT should ensure that previous iterations of the SIMS for the contract have been returned to the ACT or return the previous iteration with the request.

The AIT sends the request to the ACT via the systems team email address:

AIM-CMSystems@crossrail.co.uk

The AIT should put SIMS in the subject of the email to allow for quick identification on receipt.

If the SIMS is dependent on any currently submitted ERFs this should be highlighted in the email so that the processing of the SIMS can be done after the ERF has been processed.

5.5.2 S.2 SIMS Creation Process

After checking that no previous iterations of the SIMS are currently out the ACT will produce the next iteration of the SIMS for the contract. If the SIMS is the first iteration this will be produced without the checks being performed.

5.5.3 S.2a Request Return of Previous Iteration

If the ACT finds the contract currently has an active SIMS they will request that this is returned by the AIT for processing. The SIMS will not be produced until the previous iteration is returned.

5.5.4 S.3 Send to AIT

The ACT will send the newly created SIMS to the AIT who made the request.

5.5.5 P.4 Send to Contractor

The AIT will send the SIMS to the contractor for population.

5.5.6 C.5 Populate SIMS

The contractor will populate the SIMS in line with the information requirements as given in this process.

5.5.7 C.6 Return SIMS to AIT

The Contractor will return the populated SIMS to the applicable AIT.

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5.5.8 P.7 Return SIMS to ACT

Once the AIT has performed any quality checks on the SIMS they will return it to the ACT via the systems team email address:

AIM-CMSystems@crossrail.co.uk

The AIT should put SIMS in the subject of the email to allow for quick identification on receipt.

5.5.9 S.8 Process SIMS

Once the ACT has performed any quality checks on the SIMS the ACT will process the SIMS into AIMS.

5.6 Points of Note

The following points cover the entire SIMS process and are aimed at providing further clarification on various parts of the process (if in doubt always consult with the AIT/ACT for a workable solution).

5.6.1 Contractor ID

This is used to record any ID numbers used by the contractor to identify the serial item in either their documentation/systems.

This information is not mandatory but should be populated when available as it could assist the contractor in later stages.

5.6.2 Manufacturer ID

The Manufacturer ID refers to the OEM batch/serial number and is the number that would be used to identify that specific piece of equipment with the manufacture in case of fault, recalls etc.

5.6.3 New Serial Requests

The SIMS template will list all of the serial numbers for a contract that were held in AIMS at the time of production. When new serial numbers are requested via an ERF these will not be available on the contract SIMS until it is reproduced. For the next iteration of a SIMS to be produced (excluding the first iteration) the previous iteration must be returned to the systems team (via the AIT) for processing first.

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6 Supplementary Information

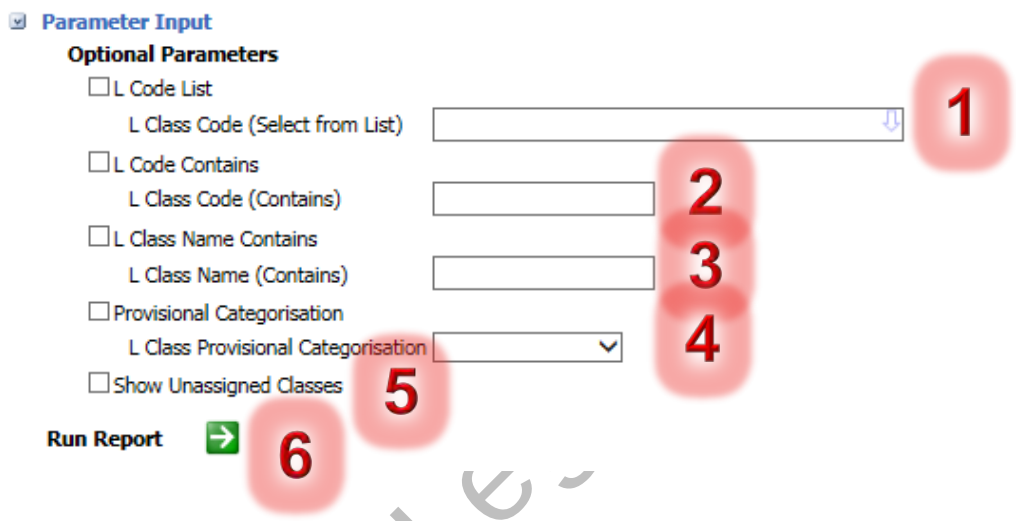
6.1 Related Searches

6.1.1 Finding Provisional Equipment Categorisation

The following eB report can be helpful in sourcing information from the AIMS system for existing equipment types: AIM-EQP-0002

This report can be found by clicking on the link above or by searching eB for reports with the number given above.

The report link is also given in the ERF above the Asset Class Details section.



The report can be utilised in a number of different ways which are detailed below:

6.1.1.1 Full Categorisation Listing

To get a full listing do not enter any criteria and click the Run Report button **(6)**

6.1.1.2 Search Categorisation by Class Code List

Start entering the required term you are searching for in the Class Code box **(1)** and then select the required code from the resulting dropdown list. Once the correct class has been selected click the Run Report button **(6)**

6.1.1.3 Search Categorisation by Class Code

Enter the L Class Code (or part of) for the required L Class in the L Class Code Contains box **(2)** and then click the Run Report button **(6)**

This will search for any L Classes which contain the entered term in their L Class Code.

I.E. Entering the number 101 A will return all L Classes which contain the 101 in their L Class Code.

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6.1.1.4 Search Categorisation by Class Name

Enter the L Class Name (or part of) for the required L Class in the L Class Name Contains box **(3)** and then click the Run Report button **(6)**

This will search for any L Classes which contain the entered term in their L Class Name.

I.E. Entering the text Pump A will return all L Classes which contain Pump in their L Class Name.

6.1.1.5 Search by Categorisation

Select the required categorisation in the L Class Provisional Categorisation drop down box**(4)**.Once the correct categorisation has been selected click the Run Report button **(6)**

Alternatively checking the Show Unassigned Classes checkbox **(5)** and then clicking the Run Report button **(6)** will display a list of classes which have yet to be assigned a provisional categorisation.

6.1.1.6 Report Results

The report returns the L Class Code, L Class Name and the Provisional Categorisation allocated to the class. Clicking on the L Class Code will take you to that location in the AIMS ADD.

The report results shown below were returned by searching on Class codes starting with L7, with Fan in the class name and a Categorisation of Category 3.

Note: If an L Class has not had its provisional categorisation set it will appear as Not Set in which case please contact the AIMT for clarification on its categorisation.

	L Class Code	L Class Name	Provisional Equipment Categorisation
☐	L7533	HVAC Fans	Cat 3
☐	L753451	Fan Tray	Cat 3
☐	L75347	Tunnel Ventilation Fans	Cat 3

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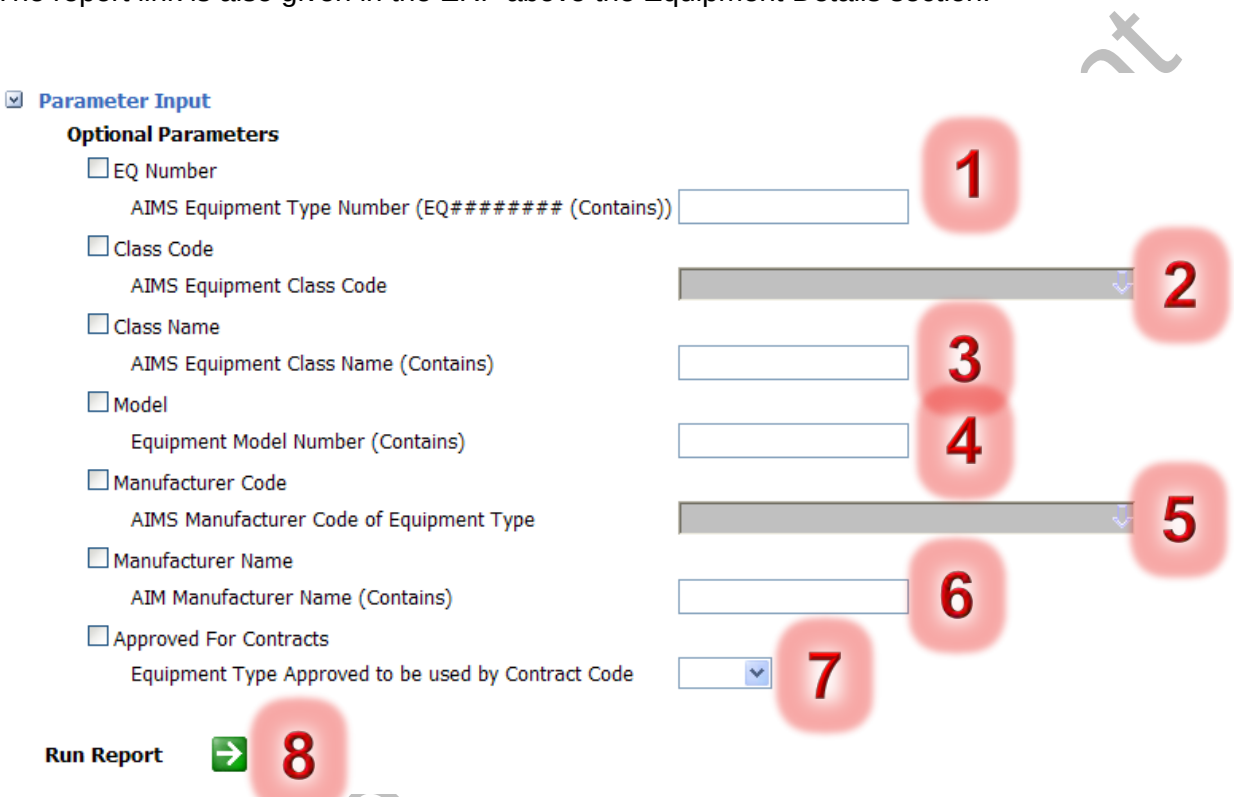
6.1.2 Finding Existing Equipment Types

The following eB report can be helpful in sourcing information from the AIMS system for existing equipment types: AIM-EQP-0001

This report can be found by clicking on the link above or by searching eB for reports with the number given above.

The report link is also given in the ERF above the Equipment Details section.



The report can be utilised in a number of different ways which are detailed below:

6.1.2.1 Full Equipment Listing

To get a full listing do not enter any criteria and click the Run Report button **(8)**

6.1.2.2 Search Equipment by EQ Number

Enter the EQ number (or part of) for the required Equipment type in the EQ Number box **(1)** and then click the Run Report button **(8)**

This will search for any Equipment Types which contain the entered term in their EQ Number.

I.E. Entering the number 101 A will return all Equipment Types which contain the 101 in their EQ Number.

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6.1.2.3 Search Equipment by Class Code

Start entering the required term you are searching for in the Class Code box **(2)** and then select the required code from the resulting dropdown list. Once the correct class has been selected click the Run Report button **(8)**

This will search for any Equipment Types which are of the class selected.

I.E. Selecting class code L121 will return all Equipment Types which are of the class code L121.

6.1.2.4 Search Equipment by Class Name

Enter the term you wish to search for into the Class Name box **(3)** and then click the Run Report button **(8)**

This will search for any Equipment Types which contain the entered term in their class name.

I.E. Entering the term cable will return any equipment types which contain cable in their class name.

6.1.2.5 Search Equipment by Model

Enter the term you wish to search for into the Model box **(4)** and then click the Run Report button **(8)**

This will search for any Equipment Types which contain the entered term in their model number.

I.E. Entering the term v1 will return any equipment types which contain v1 in their model number.

6.1.2.6 Search Equipment by Manufacturer Code

Start entering the required manufacturer code you are searching for in the Manufacturer Code box **(5)** and then select the required code from the resulting dropdown list. Once the correct manufacturer code has been selected click the Run Report button **(8)**

This will search for any Equipment Types which are produced by the selected manufacturer.

I.E. Selecting class code MFL0001 will return all Equipment Types which are produced by the manufacturer with the code MFL0001.

6.1.2.7 Search Equipment by Manufacturer Name

Enter the term you wish to search for into the Manufacturer Name box **(6)** and then click the Run Report button **(8)**

This will search for any Equipment Types which contain the entered term in their manufacturers name.

I.E. Entering the term Ltd will return any equipment types which contain Ltd in their manufacturer's name.

6.1.2.8 Search Equipment by Approved for Contracts

Select the required contract from the Approved for Contracts box **(7)** and then click the Run Report Button **(8).**

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This will search for all of the equipment types which have been approved to be used (Within AIMS) by the selected contract.

I.E. Selecting C660 will return all of the equipment types which have been approved for use in AIMS by the C660 contract, that is against C660 Asset Tags.

6.1.2.9 Report Results

The report returns the EQ Number, EQ Name, Model, Class Name, Manufacturer Code (MFL Code), Manufacturer Name, the contracts it has been approved to be used by in AIMS and the Categorisation allocated to that ET. Clicking on the EQ Code will take you to the equipment record in AIMS.

The report results shown below were returned by searching on equipment types which are produced by Manufacturers with a name containing Zit.

Note: If an ET has been approved for use on a number of contracts this will show as multiple rows in the search results unless the Approved for Contracts criteria has been set in the search.

If an ET has not had its categorisation set it will appear as Not Set in which case please contact the AIMT for clarification on its categorisation.

Report "Equipment Type Reports" Results:

	EQ Number	EQ Name	Model	Class Name	MFL Code	Manufacturers Name	Contracts
☐	EQ00000001	L75347 - MFL0503 - ZVR 1-25-250/6	ZVR 1-25-250/6	Tunnel Ventilation Fans	MFL0503	Zitron	C610
☐	EQ00000002	L75347 - MFL0503 - ZVR 1-25-315/6	ZVR 1-25-315/6	Tunnel Ventilation Fans	MFL0503	Zitron	C610
☐	EQ00000003	L75347 - MFL0503 - ZVR 1-25-300/6	ZVR 1-25-300/6	Tunnel Ventilation Fans	MFL0503	Zitron	C610
☐	EQ00000004	L75347 - MFL0503 - ZVR 1-25-185/8	ZVR 1-25-185/8	Tunnel Ventilation Fans	MFL0503	Zitron	C610
☐	EQ00000005	L75347 - MFL0503 - ZVR 1-25-185/6	ZVR 1-25-185/6	Tunnel Ventilation Fans	MFL0503	Zitron	C610
☐	EQ00000006	L75347 - MFL0503 - ZVR 1-25-280/6	ZVR 1-25-280/6	Tunnel Ventilation Fans	MFL0503	Zitron	C610
☐	EQ00000007	L75347 - MFL0503 - ZVR 1-25-560/6	ZVR 1-25-560/6	Tunnel Ventilation Fans	MFL0503	Zitron	C610
☐	EQ00000008	L75347 - MFL0503 - ZVR 1-28-355/6	ZVR 1-28-355/6	Tunnel Ventilation Fans	MFL0503	Zitron	C610
☐	EQ00000009	L75347 - MFL0503 - ZVR 1-28-280/8	ZVR 1-28-280/8	Tunnel Ventilation Fans	MFL0503	Zitron	C610
☐	EQ00000010	L75347 - MFL0503 - ZVR 1-28-200/8	ZVR 1-28-200/8	Tunnel Ventilation Fans	MFL0503	Zitron	C610

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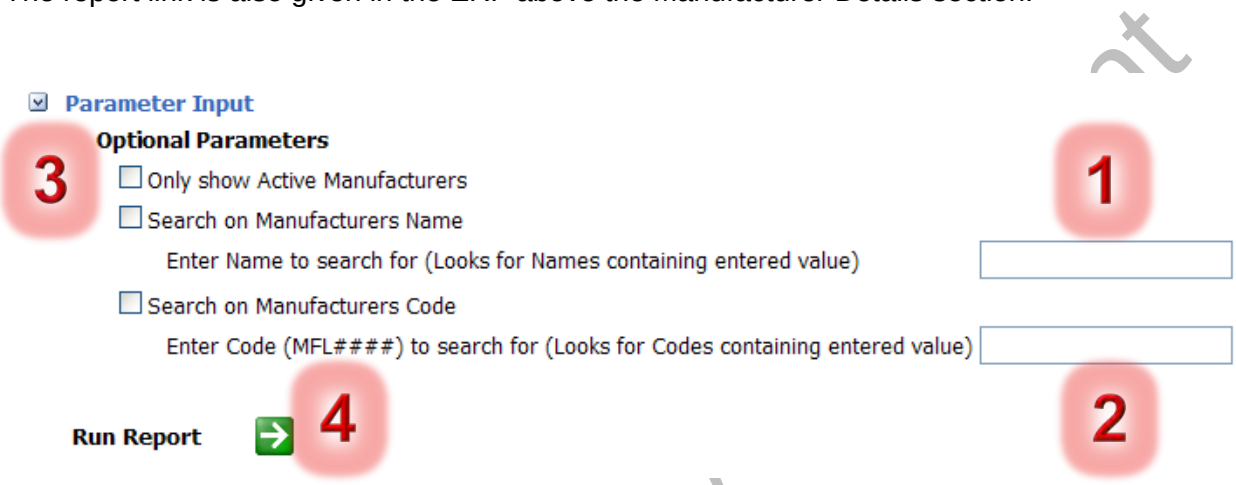
6.1.3 Finding Existing Manufacturers

The following eB report can be helpful in sourcing information from the AIMS system for existing manufacturers: AIM-MFL-0001

This report can be found by clicking on the link above or by searching eB for reports with the number given above.

The report link is also given in the ERF above the Manufacturer Details section.



The report can be utilised in a number of different ways which are detailed below:

6.1.3.1 Full Manufacturer Listing

To get a full listing do not enter any criteria and click the Run Report button **(4)**

6.1.3.2 Search Manufacturers by Name

Enter the required term you are searching for in the Manufacturers Name box **(1)** and then click the Run Report button **(4)**

This will search for any Manufacturers which contain the entered term in their name

I.E. Entering the letter A will return all manufacturers which contain the letter A in their name.

6.1.3.3 Search Manufacturers by Code

Enter the required term you are searching for in the Manufacturers Code box **(2)** and then click the Run Report button **(4)**

This will search for any Manufacturers which contain the entered term in their code.

I.E. Entering the number 10 will return all manufacturers which contain the number 10 in their code.

6.1.3.4 Excluding Inactive Manufacturers

To exclude any inactive Manufacturers check the Active Manufacturers check box **(3)** and then click the Run Report button **(4)**

This functionality can be combined with all of the other report types detailed above.

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I.E. Checking this option and then clicking the Run Report button with no other criteria entered will return a full list of all active manufacturers.

6.1.3.5 Report Results

The report returns the Manufacturer Code, Name and its Status (Active/Inactive). Clicking on the Manufacturer code will take you to the manufacturer in AIMS.

The report results shown below were returned by searching on Manufacturers with the number 10 in their Code.

Report "Manufacturer Report" Results:

Code	Name	Status
MFL0010	Abtus Ltd	Active
MFL0100	Corus Cogifer	Active
MFL0101	Coughtire International Ltd	Active
MFL0102	Craig & Derricott Ltd	Active
MFL0103	Crabtree	Active
MFL0104	Crane Fluid Systems	Active
MFL0105	Crovin Metalworks Ltd	Active
MFL0106	Croylek Ltd	Active
MFL0107	Crown House Technologies	Active
MFL0108	CTInsulations	Active
MFL0109	CSD Sealing System	Active
MFL0110	Danfoss Ltd	Active
MFL0210	Howells Railway Products Ltd	Active
MFL0310	Phillips	Active
MFL0410	Tecton Ltd	Active
MFL0510	Commend	Active

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7 Appendix

7.1 ERF/SIMS

7.1.1 ERF Cover Sheet

AIMS Equipment Request Form (ERF) (CRL1-XRL-Z3-ZTM-CR001-50006 Rev 3.0)

AIMS Form Number	
Contractor Form Number	

Request Details

Name:	
Company:	
Construction Contract:	
Date:	

7.1.2 ERF Equipment Request Section

AIMS Equipment Request Form (ERF) (CRL1-XRL-Z3-ZTM-CR001-50006 Rev 4.0)

eB Reports	AIM-EQP-0002	AIM-MFL-0001		AIM-EQP-0001					
Template Details	Asset Class Details	Manufacturer Details		Equipment Details					Serial/Batch Creation
		Existing	New	Existing	New			Relationships	
Request Type	Asset Class Code	Code	Name	EQ Number	Model	Description	Equipment Category	eB MCR Number	Quantity Required

Contractor Details	
Further Information	Comments

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7.1.3 ERF Equipment Request AIMS Administration Section

AIMS System Team Only					
Comments	EQ Number	SN/SB Numbers	Pre-Conditions Checked	Request Completed Date	Request Completed By

7.1.4 SIMS Template

Asset Details (if installed)		Equipment Details			Serial/Batch Details			Status	
Asset Tag	Asset Name	EQ Number	Name	Description	CRL ID	Contractor ID	Manufacturer ID	Contractor ID	Manufacturer I
		EQ00000297	L7412 - MFL0022 - Protect 3.33	AEG Power Solutions, UPS, Protect 3.33 Three Phase Output	SN-00003	ghyye-001	xyz-0003-03a	Changed	Changed
		EQ00000297	L7412 - MFL0022 - Protect 3.33	AEG Power Solutions, UPS, Protect 3.33 Three Phase Output	SN-00004				
		EQ00000298	L7684 - MFL0113 - 106R1	Delmatic Ltd, Router for Lighting Control, Smart IP FC Router - 106R1	SN-00002				
		EQ00000298	L7684 - MFL0113 - 106R1	Delmatic Ltd, Router for Lighting Control, Smart IP FC Router - 106R1	SN-00003				

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7.2 AIM-MFL-0001 eB Report

Report "Manufacturer Report"

Code	Name
AIM-MFL-0001	Manufacturer Report
Description	**Report Type**
Used For Equipment Manufacturers	Interactive Report

Parameter Input

Optional Parameters

- ☐ Only show Active Manufacturers
- ☐ Search on Manufacturers Name
  - Enter Name to search for (Looks for Names containing entered value)
- ☐ Search on Manufacturers Code
  - Enter Code (MFL####) to search for (Looks for Codes containing entered value)

Run Report

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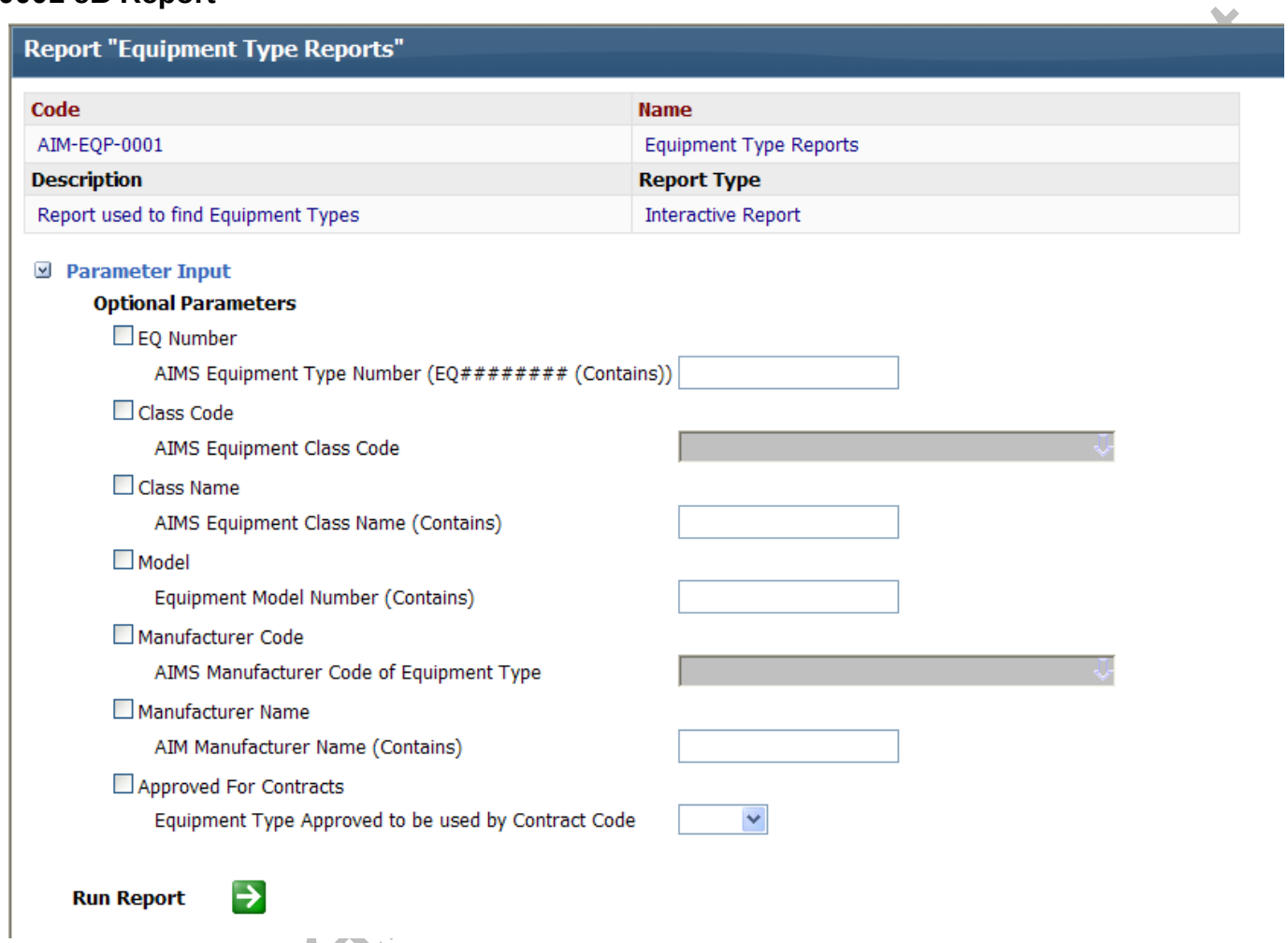
7.3 AIM-EQP-0001 eB Report



Report "Equipment Type Reports"

Code	Name
AIM-EQP-0001	Equipment Type Reports
Description	**Report Type**
Report used to find Equipment Types	Interactive Report

Parameter Input

Optional Parameters

- EQ Number
  - AIMS Equipment Type Number (EQ######## (Contains))
- Class Code
  - AIMS Equipment Class Code
- Class Name
  - AIMS Equipment Class Name (Contains)
- Model
  - Equipment Model Number (Contains)
- Manufacturer Code
  - AIMS Manufacturer Code of Equipment Type
- Manufacturer Name
  - AIM Manufacturer Name (Contains)
- Approved For Contracts
  - Equipment Type Approved to be used by Contract Code

Run Report

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7.4 AIM-EQP-0002 eB Report

Report "Equipment Provisional Categorisation Report"

Code	Name
AIM-EQP-0002	Equipment Provisional Categorisation Report
Description	**Report Type**
Used to find the provisional categorisation of equipment	Interactive Report

Parameter Input

Optional Parameters

- ☐ L Code List
  - L Class Code (Select from List)
- ☐ L Code Contains
  - L Class Code (Contains)
- ☐ L Class Name Contains
  - L Class Name (Contains)
- ☐ Provisional Categorisation
  - L Class Provisional Categorisation
- ☐ Show Unassigned Classes

Run Report

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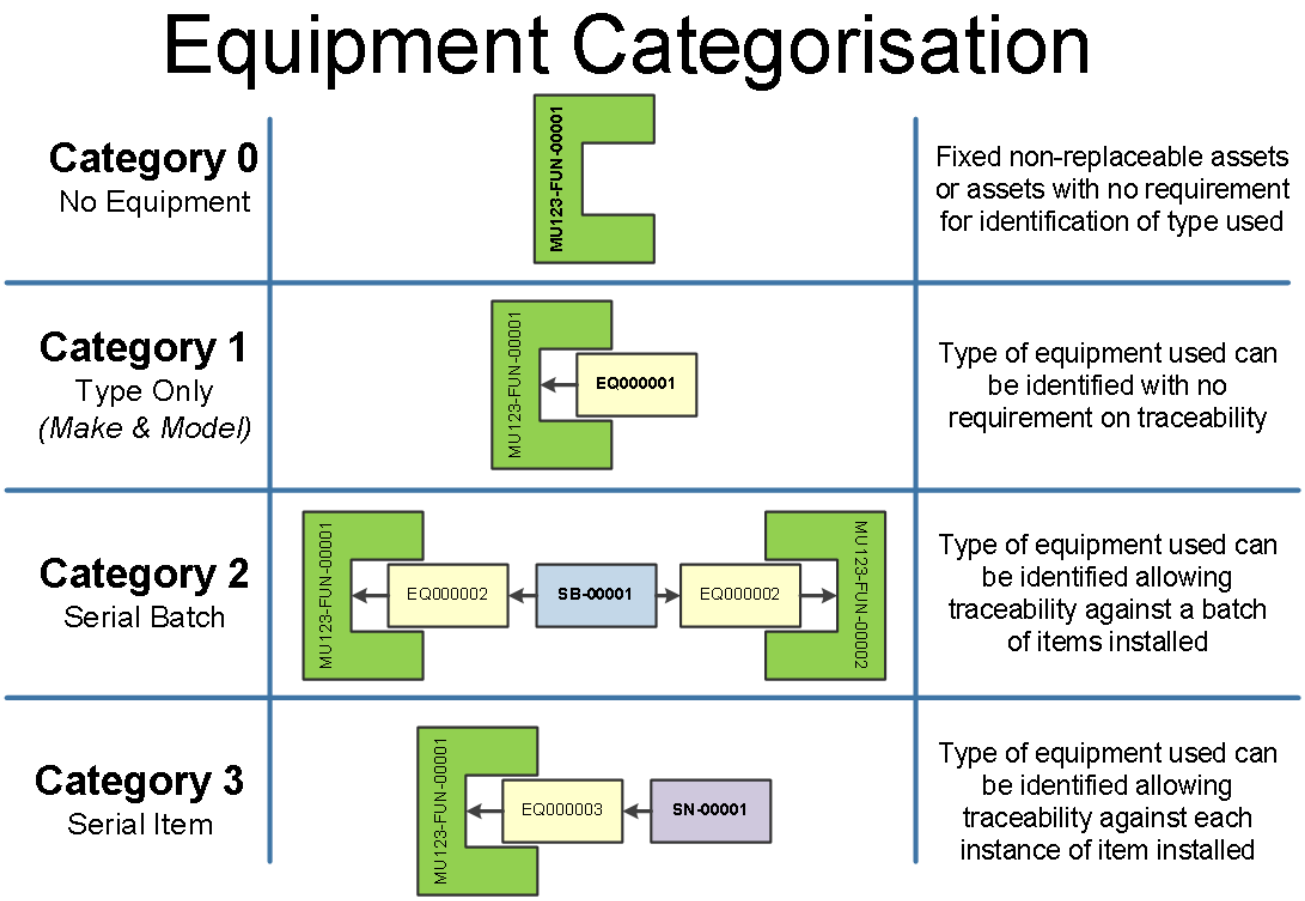
7.5 Equipment Categorisation Diagram



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