Asset Management:
Asset Management Reporting System

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Asset Management Reporting System (AMRS) User Manual

Timothy Harvey
Asset Management Program
National Park Service

Elizabeth A. Dodson
Training Manager Team Leader
WASO-PFMD
National Park Service

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Stephen A. Wolter
Executive Director

Nona Capps
Project Manager

Acknowledgements

Contributing National Park Service Staff
Karl Bachman
Ron Chaney
Ray Cozby
Mike Doherty
Marcus Ferro
Dave Forney
Mike Hill
Natalya Karamyshev
Meg Leffel
Steve Maass
Debbie Mason
Jim McCarthy
Jeri Mihalic
Igor Vorozheykin
Olivia Shinomoto
Ruth Pourier
Nancy Pearson

Contributing Eppley Institute Staff
Geoff McKim
Matthew Berry
Christy McCormick
Kristen Renzi
Christie Wahlert
Michael Lewis
Jeremy Hackerd
Jeff Bransford
Allene Lowrey

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INTRODUCTION

This manual is designed to provide users with the information they need to access and run management reports through the Asset Management Reporting System (AMRS). The AMRS is a web-based portal that allows report writers to make their work available over the National Park Service (NPS) intranet.

The Facility Management Software System (FMSS) provides Servicewide management capabilities for facility management personnel. However, the reporting capabilities built into the FMSS are limited and do not provide the power needed to bring facility management information into the hands of the people who could use it most effectively. Through the AMRS, pre-defined reports can be generated, viewed, printed, and e-mailed, either immediately, upon demand, or at a subsequent date or time when server usage is likely to be low.

The purpose of this manual is to show you how to access, run, and review the output of the pre-defined facility management reports that have been provided through the AMRS. It is intended to serve as a job-aid to those individuals using the FMSS data.

Throughout the manual, you will notice the occasional appearance of the following icons. They mark notes, terms, and instructions and help to clarify important points.

The computer monitor icon highlights keystrokes needed to input data into the AMRS.

The wrench indicates useful tools or tips that can be used within the software, including shortcuts or time-saving methods in the FMSS computer application.

The caution sign indicates that you should be careful to pay particular attention to a specific aspect of the content, as it will have an impact on your success.

This symbol designates a listing of the key terms to look for as you review the handbook content. The key terms will be easily identified by the key symbol in the left margin.

GAINING ACCESS TO THE AMRS SYSTEM

Obtaining an Account
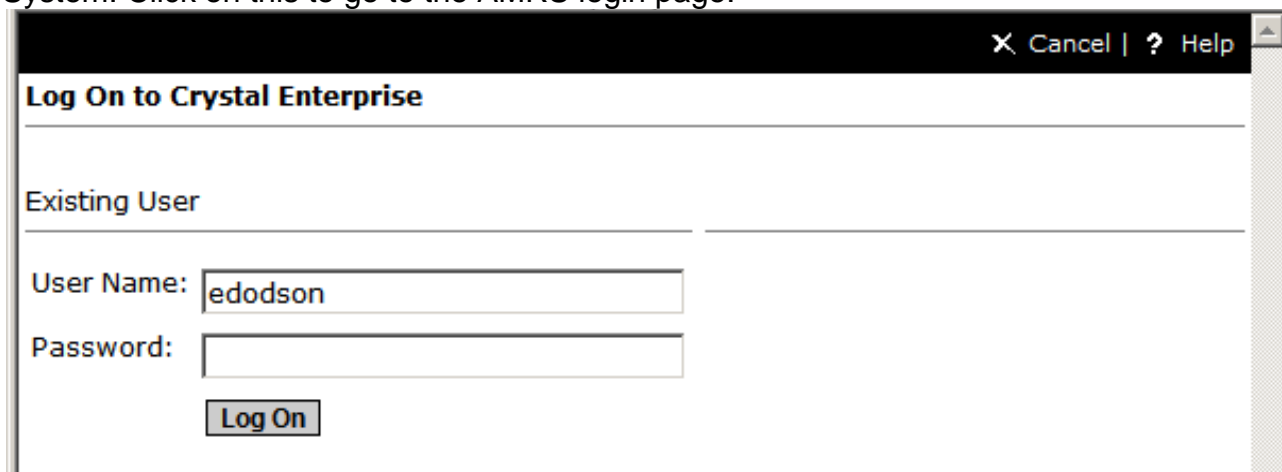
Both FMSS users and non-users need to request access to AMRS. This should be done through the User Management link found under "Related Information" on the FMSS portal page. See the Operations and Maintenance: Facility Management Software System Student Manual for step by step instructions. Your NPS username and password will be used to log on; this is the same username and password you use to log into your computer.

Logging on to the AMRS

The AMRS is accessed through your web browser. It can only be accessed through the NPS intranet. To access the reporting system, open your web browser (Microsoft Internet Explorer 5.0 or higher) and go to the following web address:

http://pfmd2.nps.gov/fmp/fmss/

Under "Access to Other Applications," you will see a link to the Asset Management Reporting System. Click on this to go to the AMRS login page.

Figure 1: Log On Screen

1 Both FMSS users and non-users need specific access to AMRS. You can request access through the FUMP process.
2 Enter your NPS **Username**. This is the username you use to log into your computer.
3 Enter your NPS **Password.** Again, this is the password you use to log into your computer.
4 Click the **Log On** button.

You should now be successfully logged onto the AMRS.

NAVIGATION OF THE ASSET MANAGEMENT REPORTING SYSTEM (AMRS)

Once you have logged on, you should see the AMRS home page, which provides entry to all of the pre-defined reports to which you have access. If you don't know which folder a certain report is located in, you can use the Search function. Type in what you think the title is, and it will bring up all reports with that in the title of the report.

CAUTION Search results listed below are from all folders. Be sure to hover over the report title to determine which folder the report is from.
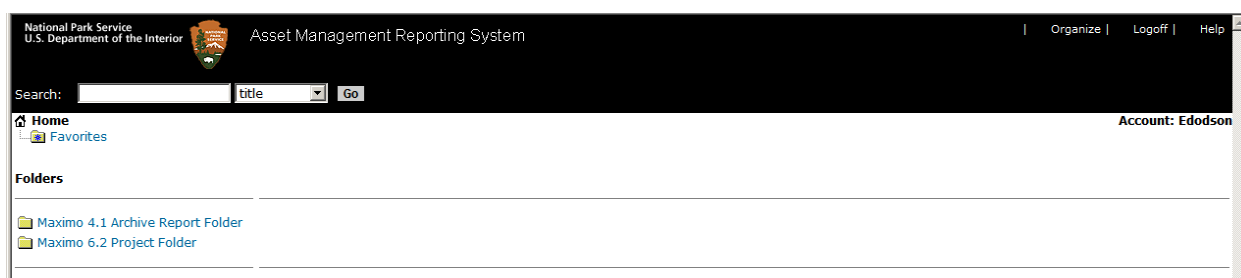
Figure 2: Reports in the Park Management Folder

To open a folder, double-click on the folder icon.

Report Organization and Usage

As Figure 2 illustrates, from the home screen you will be given a choice of Maximo 4.1 Archive Report Folder and Maximo 6.2. Project Folder. There are subfolders organized by application. In the subfolders there are lists of individual reports.

The Management, Park Management, and FMSS–Audit folders include reports that have been identified as meeting most of an FMSS user's routine reporting needs.

- Management reports are those that are most likely to be useful at the regional and WASO levels, emphasizing the ability to roll-up and summarize data from multiple parks.
- Park Management reports are the detailed reports that are most likely to be useful to park facility managers.
- FMSS Audit reports are those that are useful in maintaining and validating the quality of asset management and work order data in the system.

NOTE: Reports are organized by *suggested* use, not *required* use. In other words, all user levels, from park manager to WASO supervisor, may find reports in other organizational folders useful. Regardless of your position, explore the other folders to view all of your reporting options.

You will also be able to build your own personal favorite reports folder that only you can see, which allows you to store the reports you use most frequently in one place for your own usage.

You will learn more about this option in the section, *Development of Personal Favorite Reports Folder*, beginning on page 8.

Other reports that most individuals use more sporadically can be found under the other report folders. These are organized by major FMSS application (e.g., Inventory, Labor, Plans, Purchasing, etc.).

CAUTION Reports in the other report folders have not been validated or formatted and are more likely to be updated at some point in the future. When a report is updated, it affects anyone who has scheduled the report to run at a certain time. If a report you have scheduled is changed, you will need to reschedule it in order for it to run correctly.

NOTE: New reports will be created from time to time and added to the appropriate folders. Therefore, you may see some additional reports available beyond those that are shown in the figures in this manual.

Navigating Report Folders

If you double-click on a selected folder, the reports within that folder will be displayed in a list.
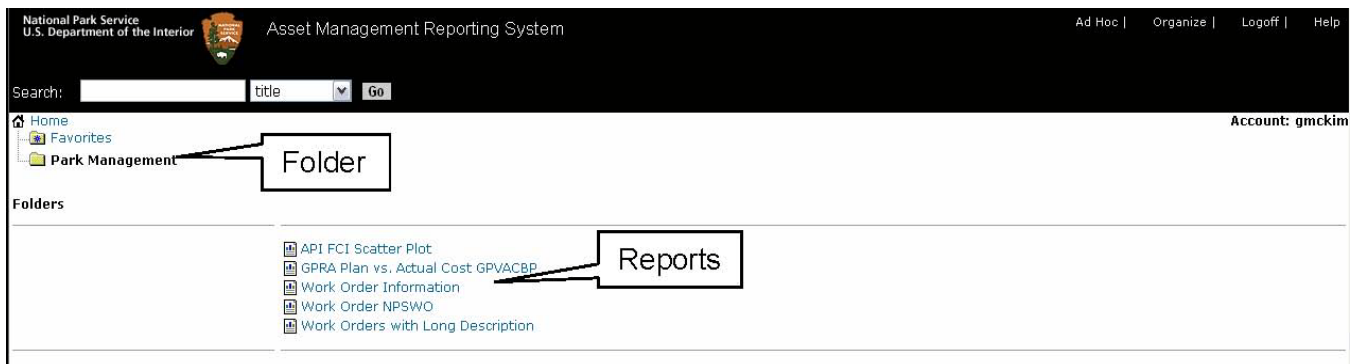
Figure 3: Report Sub-Folder Organization

CAUTION To see additional details about a particular report, move your mouse over the title of the report. You will see a brief description of the report, as seen in Figure 4. Moving your mouse over the title will also verify that the report is identified as 6.2.
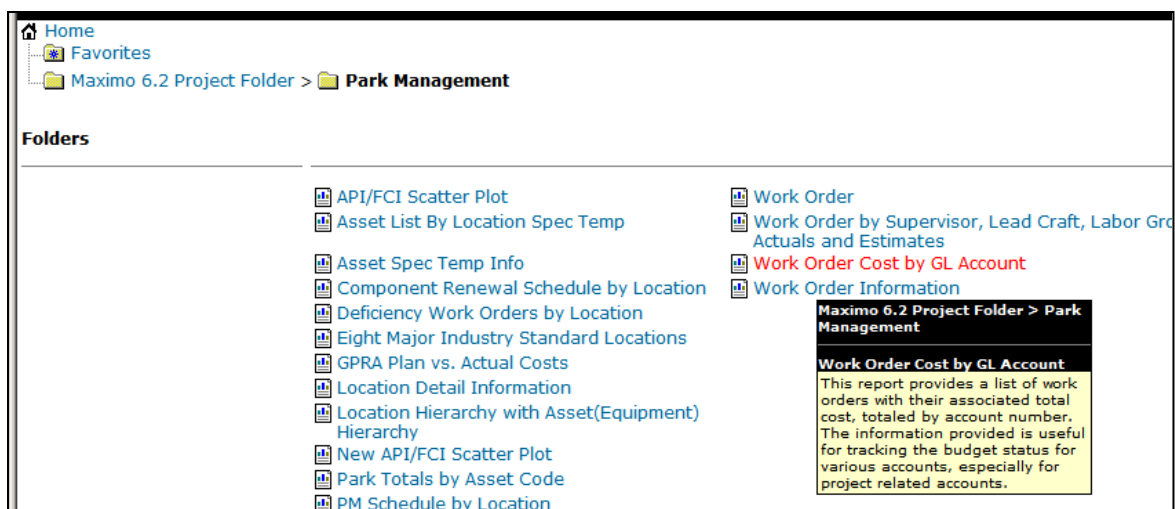
Figure 4: Report Roll-Over Description

Action Menu Description

There are four main actions that can be performed on any report: View, View Latest, Schedule, and History. To open a report menu, click on the report name. In this example, clicking on the Work Order Information report title will open the Work Order Information action menu.

Figure 5: List of Reports and Action Menu

There are four main actions that can be performed on any report: View, View Latest, Schedule, and History. To open a report menu, click on the report name. In this example, clicking on the Work Order Information report title will open the Work Order Information action menu.

View: Generates and displays the report interactively, using the most current data available.
View Latest: Instance: Allows a user to see the report as it was run the last time.

CAUTION
　　　　　 Selecting "View Latest Instance" shows the last report run by anyone, NOT the last time the user ran the report.

Schedule: Programs reports to run at a time designated by the user. The user may also schedule reports to run periodically.

History: Shows the recent scheduled history of this report, which includes who generated the report, what the parameters were, the date it was generated, and whether or not it was generated successfully.

Occasionally very large reports containing many thousands of records, may take up to ten minutes to generate. However, it typically takes less than a minute. By viewing the History of a report, a report can often be generated in a few seconds. However, a report generated in this fashion may not contain the most current data, and it may not be based on the parameters that you want to use. If the user needs a report to generate periodically (such as daily, weekly, or monthly) then it should be scheduled in advance during off-hours so that the reports are generated at a time when the server is not experiencing a high volume of user traffic.

Further information about the action menu will be given in the next chapter: *The Detailed Functions of the Action Menu*.

Development of Personal Favorite Reports Folder

Although the folders described above represent an attempt to identify those reports that are most likely to be useful to FMSS users, you also have the ability to create your own personal Favorite reports folder, which can be used to provide quick access to the reports that you use the most. This folder will only be visible to you; other users will have their own Favorite reports folders. By adding and deleting reports from this folder, you can easily and quickly access your most commonly used reports.

To create your Favorites folder, click on the link labeled "Organize" in the upper right-hand corner of the screen. You will then see the Organize Folders dialog box:
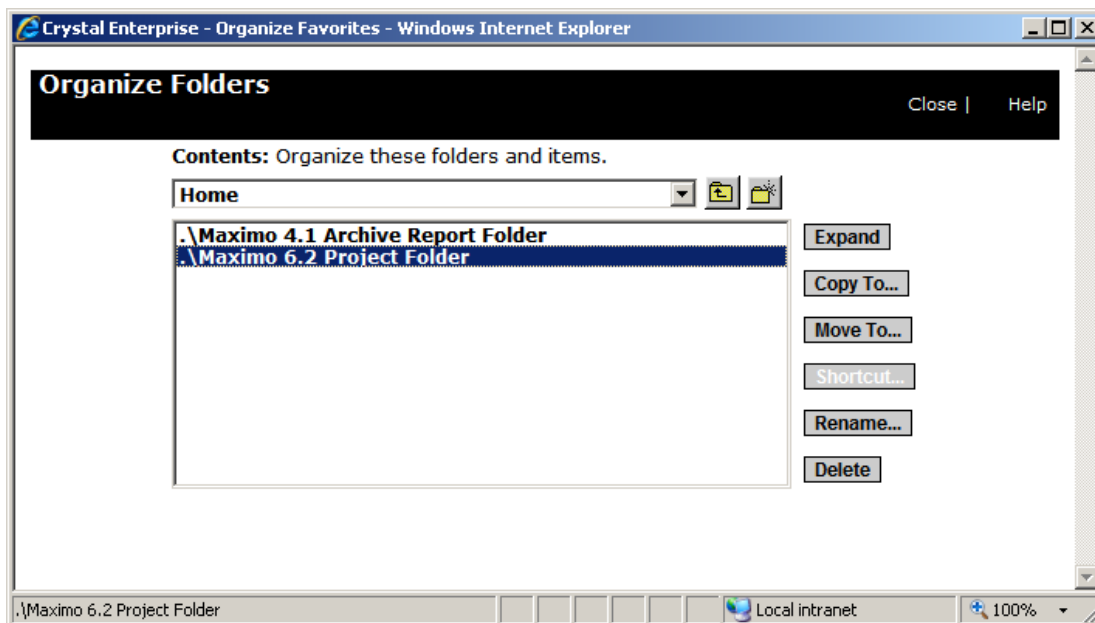
Figure 6: Organize Folders Dialog Box

The Organize Folders dialog box allows you to move reports into and out of your Favorites folder. To copy the report "Work Order Information" from where it is in the Park Management folder into your Favorites folder, first click on the Park Management folder, and then click the Expand button. You will see a list of the reports in the Park Management folder, as shown below.
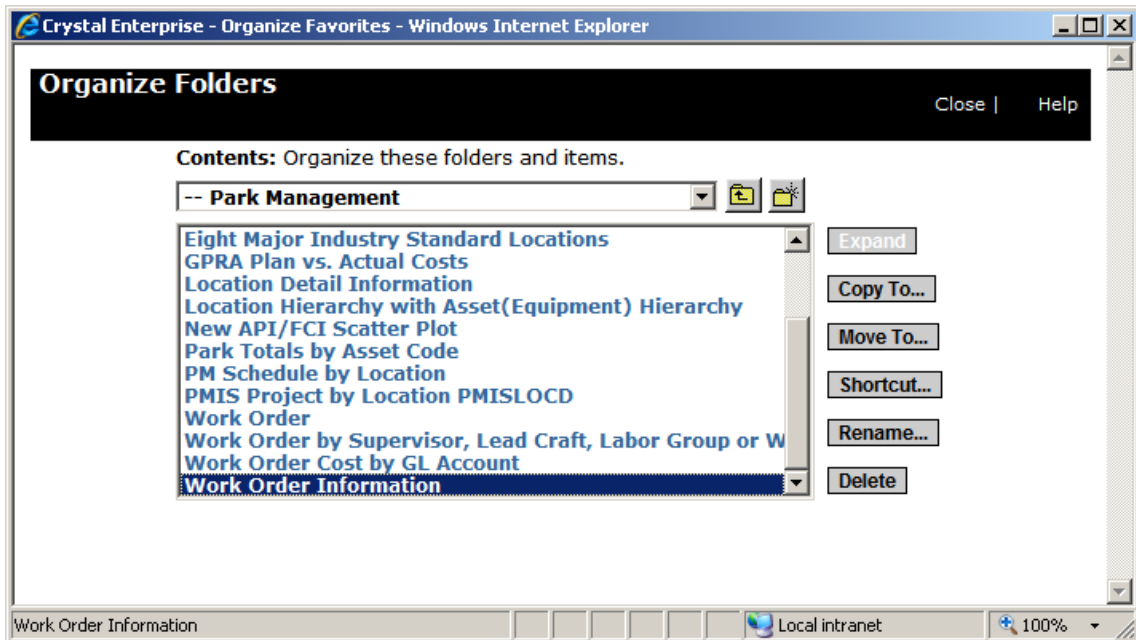
Figure 7: Expanded Folder View – Reports in the Park Management Folder

Highlight the report you want to copy to your Favorite reports folder and click the Copy To… button.
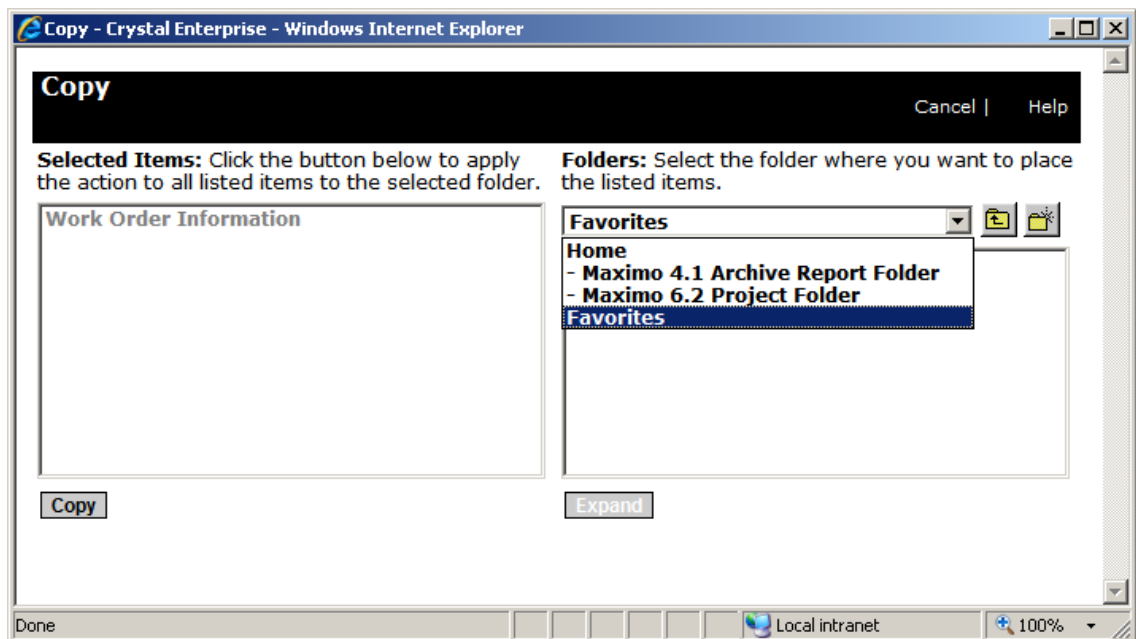
Figure 8: Copy Folders Window

In the left panel, you will see the report that you are copying. On the right, you will see the folder into which you can copy the report. Notice that you will not see your Favorite reports folder. To see your Favorite reports folder, you must go up one level in the folder hierarchy. You can do this by clicking on the dropdown menu icon and choosing Favorites.
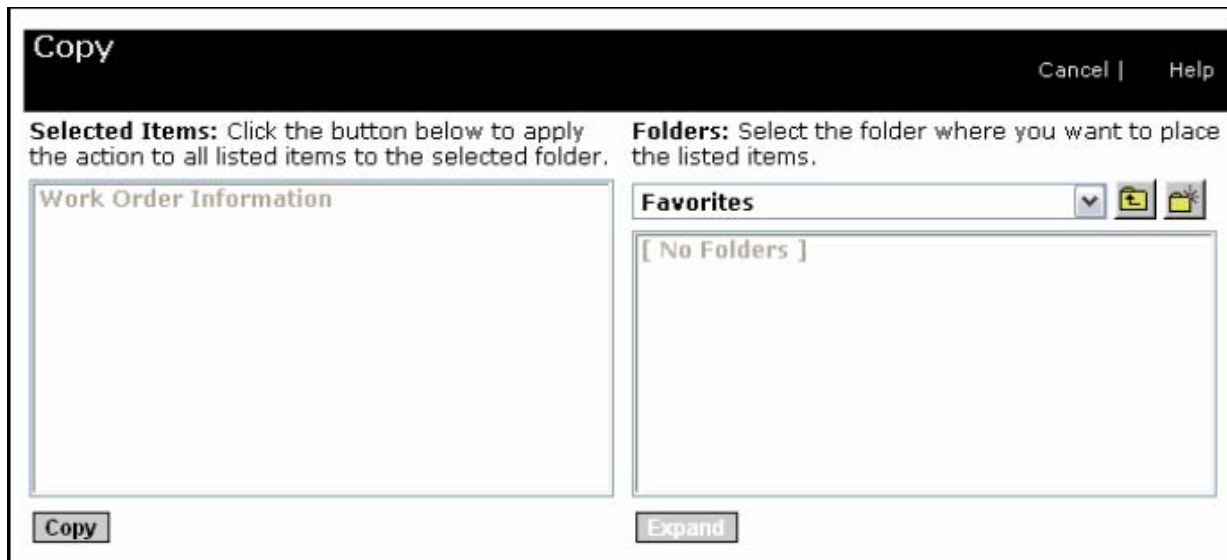
Figure 9: Copying Reports to Your Favorite Reports Folder

Clicking on the [icon] icon will display all of the reports currently in your Favorite reports folder. When you first begin to use the AMRS, there will be no reports in this folder. To copy the report "Work Order Information" into your Favorite reports folder, click the Copy button.

You will now be able to view and work with reports in your Favorites reports folder by clicking on the Favorites link from the home page (*see* Figure 10).
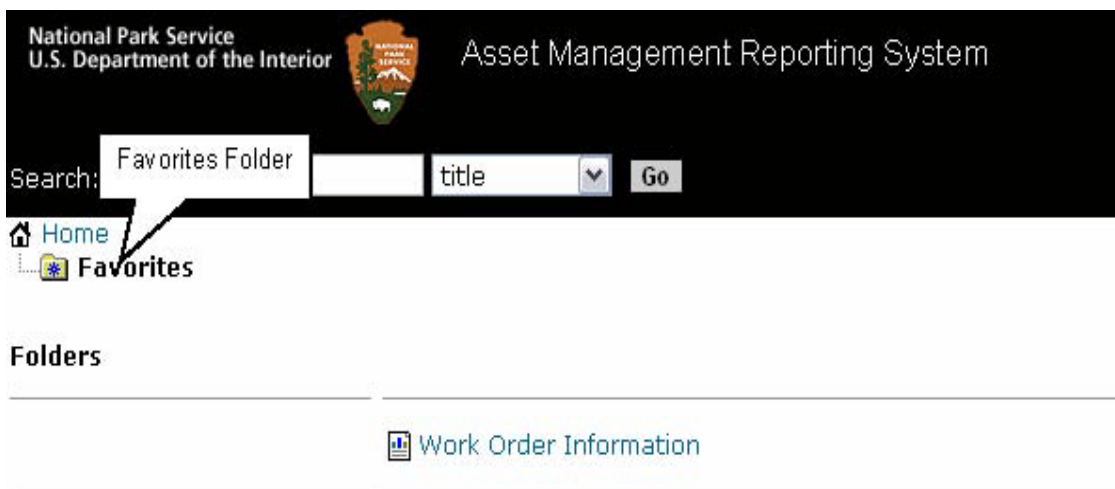
Figure 10: Favorites Folder View

You should now have a basic idea of how to navigate through the folders of the AMRS. We will now turn to the action menu to outline the basic purpose and multiple functions of the system.

DETAILED FUNCTIONS OF THE ACTION MENU
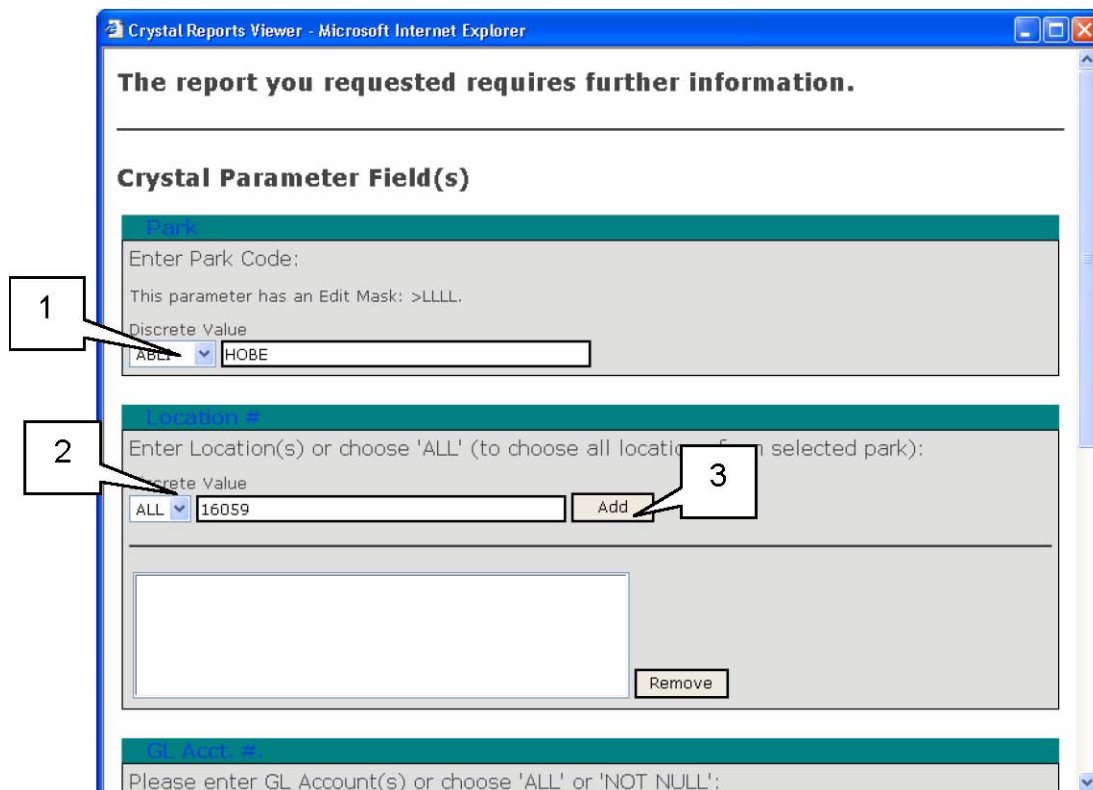
As you learned earlier, the action menu has four basic functions: View, View Latest Instance, Schedule, and History. Again, to access the action menu, you simply click on the name of the report you wish to view or schedule (*see Figure 5*). From there you will choose one of the available actions, whose functions we will now outline.

Function and Use of the View Option
The View option generates reports in real time interactively. Clicking on the View icon will open the parameter window. An example of the parameter window is illustrated in Figure11.

Parameters: Parameters allow you to choose the exact information you want to include in your report. The parameters available for a given report will differ depending on the nature of the report. Examples of parameters include: region, park alpha code, asset/location, work order status, occupant, and many others.

NOTE: It is important that each parameter is filled in, even if you select "ALL" as the value of the parameter (ALL locations, ALL asset types, etc.).

Figure 11: Report Parameter Menu

Selecting Parameters

1 The first parameter in this example is for the **park alpha code.** You may either type the code in all capital letters or select it from the drop-down menu or pick list.

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> **CAUTION**
> It is very important to remember that you must use all capital letters (e.g., "GRCA" rather than "grca") when entering your park alpha code or the report will not be generated.

The "Edit Mask" that you see in the example in Figure 11 is an internal code used by the computer to define the format for a particular parameter. You can ignore the edit mask.

> **2** Another common parameter is **Location #**. In this example, you are allowed to enter more than one value for a parameter.
> **3** Select a value in the drop-down menu, or type in the Location Record number, and click on the **Add** button. Repeat until you have all the desired values in the window.

Entering Date Parameters

Some reports require that you enter dates or date ranges as parameters. For example, you may view reports on work orders based on the date they were created. The figure below shows an example of the date parameter. To fill in this field, click the calendar icon to the right of the parameter. A pop-up calendar window will appear. Click on the date that you want to use as the value for each date parameter. Many of the reports allow the user to select which date range type they want, such as Report Date, Target Start Date, Actual Start Date, etc.
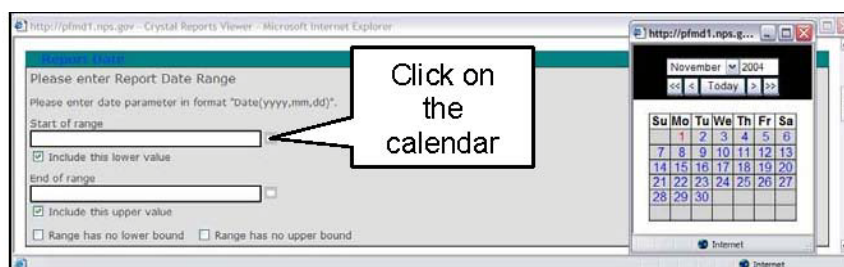
Figure 12: Calendar Icon and Selecting a Date Parameter

> **CAUTION**
> You should generally use the Calendar, as illustrated above, to enter date parameters when generating a report. If you want to enter the date manually, you must enter the date in the format that the AMRS expects: Date (YYYY,MM,DD). For example, to enter February 1, 2005, you would type: Date (2005,02,01).

The lower value or bound refers to the earliest point in the report's history. Entering in no upper bound will return records up to the current date. However, you must have a lower bound or upper bound specified for AMRS to run the report.

> **CAUTION**
> When entering parameters, you *must* click the Add button at least once, even if you are selecting the "ALL" value for the parameter

After entering all parameter values, click the **OK** button to generate the report.

The report will appear in one to three minutes, depending on the length and amount of data you have requested. Remember, very large reports may take longer to generate.

NOTE: For more information and definitions of the different FMSS report parameters, see Appendix B.

Navigation using the AMRS Viewer
The AMRS Viewer allows you to browse and navigate interactively through the results of the AMRS report. It also allows you to save and print the report.
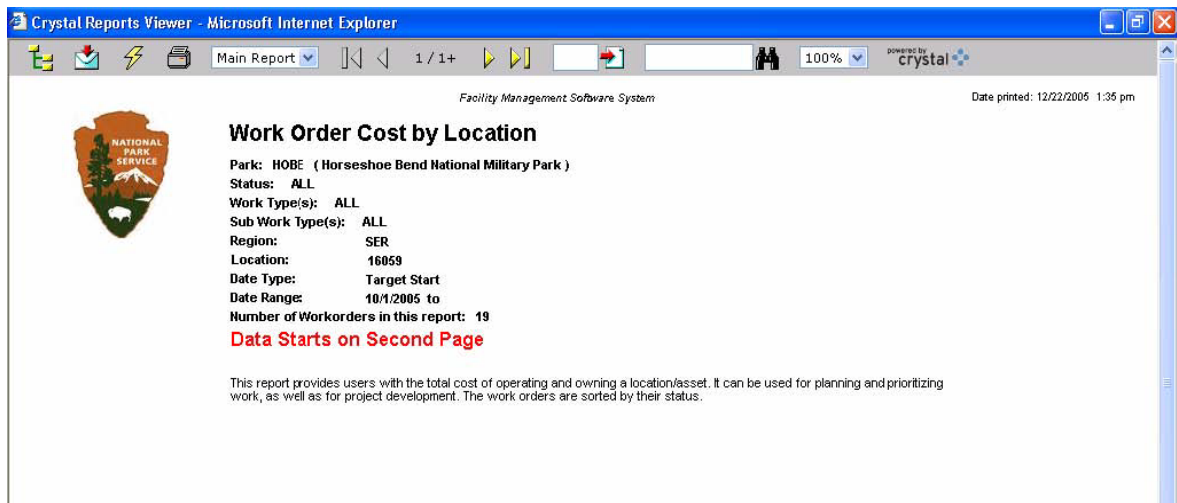
Figure 13: First Page of Report

The first page of a report, as shown in Figure 13, usually provides the documentation for a report. In this example, the documentation consists of the name of the report (e.g., "Work Order Information"), the parameters used in generating this report, and some information about the appropriate usage of the report.

To move on to the second page of the report, where the data begins, click the Next Page icon, , which will open the AMRS Viewer window, as shown in Figure 14.
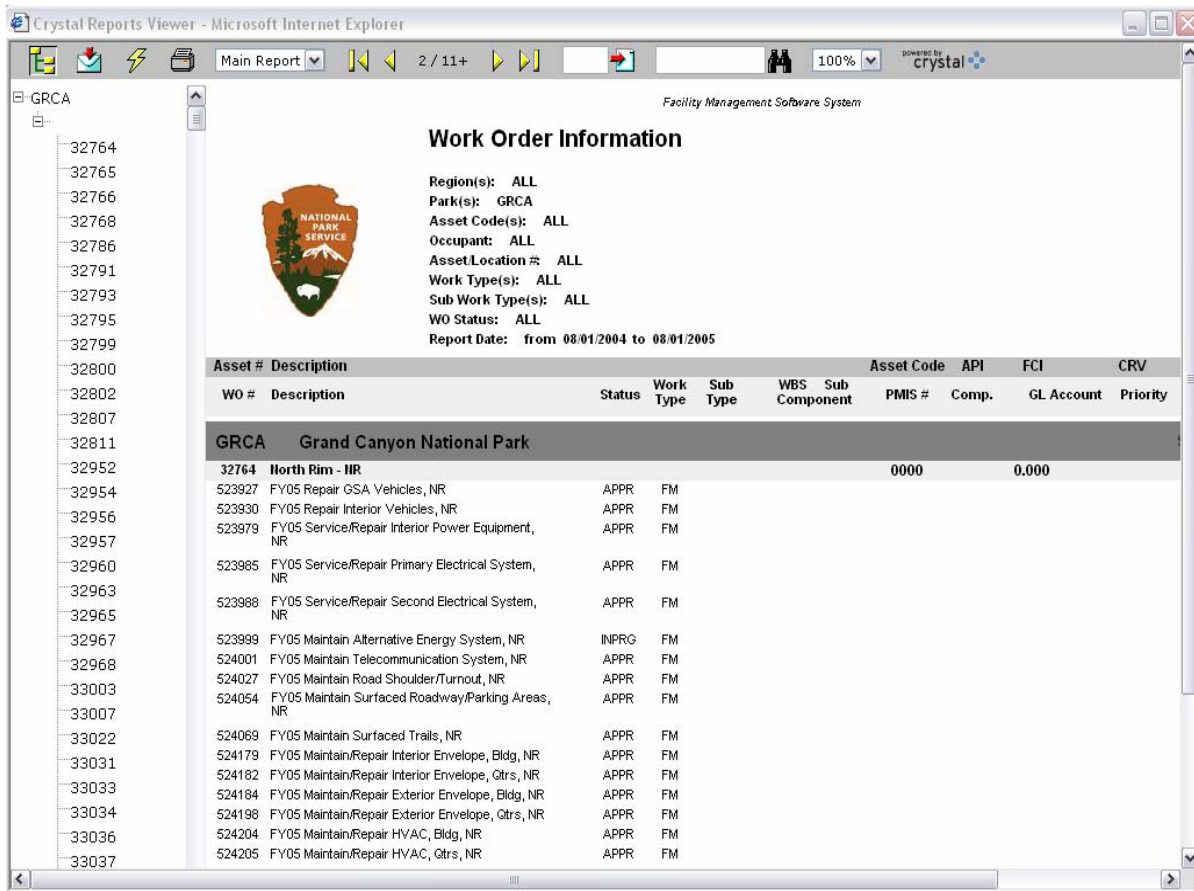
Figure 14: AMRS Viewer Window

The menu bar at the top of the AMRS Viewer window contains a series of buttons that allow you to move around the report and print or export the report to a variety of formats.

Group Tree: Clicking this button turns the group tree on or off. The group tree allows you to navigate quickly to a particular group of data. In this example, the group tree shows all the locations that are in the report. In the window above, the group tree is on the left side of the report. Clicking on a location number will move you to the page with that location data. Turning off the group tree allows the user to see more data fields without having to scroll across.

Export: Clicking this button allows you to send the output to a file using a variety of file formats. Once you select a file type, you will then need to select a file name and location, just as if you were saving a file. The file formats that you can export from the Crystal Report Viewer are as follows: Adobe Acrobat, MS Word, MS Excel, MS Excel (Data only), and Rich Text Format. The file formats are described in Figure 30 (*see* pages 31-32).

Refresh: The refresh button permits you to run the report again, allowing you to choose different parameters. This will not save the parameters you already selected; all parameters will have to be identified again.

To run another report using most of the parameters of the first report:

4100	OPERATING	3,108.00	SF	P276
4100	OPERATING	2,300.00	SF	P276
3100	OPERATING	1.76	AC	P276
7400	OPERATING	1.00	EA	P276
7400	OPERATING	1.00	EA	P276
6300	NOTAPPLICABLE	1.00	EA	P276
2100	OPERATING	986.00	LF	P276
3100	OPERATING	2.12	AC	P276
2100	OPERATING	1,420.00	LF	P276
4100	OPERATING	1,018.00	SF	P276
4100	OPERATING	360.00	SF	P276
6300	OPERATING	1,872.00	LF	P276
4100	OPERATING	2,418.00	SF	P276
0000	NOTAPPLICABLE	1.00	EA	P276
6300	OPERATING	54,101.00	SF	P276
5400	OPERATING	1.00	EA	P276
5400	OPERATING	1.00	EA	P276
4100	OPERATING	3,384.00	SF	P276
4100	OPERATING	934.00	SF	P276
4100	OPERATING	1,654.00	SF	P276
4100	OPERATING	60.00	SF	P276
4100	OPERATING	851.00	SF	P276
4100	OPERATING	818.00	SF	P276
4100	OPERATING	3,135.00	SF	P276

Context menu options:
Back
Forward
Save Background As...
Set as Background
Copy Background
Select All
Paste
Create Shortcut
Add to Favorites...
View Source
Encoding ▶
Print...
Print Preview...
Refresh
Export to Microsoft Excel
Send To Bluetooth
Properties

Right click on the report page – The context menu will open.

1. Select the Back option

The report you requested requires further information.

Crystal Parameter Field(s)

Location
Enter Top Level Location:
Discrete Value
JOMU

System
Enter System:
Discrete Value
PRIMARY PRIMARY

OK

The previous parameters will open. You can make any change needed for the second report
2. Select OK

Your second report will now open.

Print: This allows you to print the report. The print options will correspond to your specific printer and the printers that are available to you on your network. You should always confirm the number of pages that the report will generate before you print.

When you try to print for the first time on a different computer, you may get a white box with no options. To fix this you need to contact the helpdesk.

Navigation Buttons
This series of arrow buttons allows you to move through the pages of the report.

Go to first page

Go back one page

Go forward one page

Go to last page

Skip to Page Function: Allows you to enter a specific page number and skip to that page. To use this, type a page number in the box and click on the page icon.

Page Number: Shows you which page you are on and how many total pages are in the report. However, the number that shows you the total number of pages in the report will not be accurate until you view the last page in the report. By default, it is "1+", which only tells you that there is more than one page in the report. To find out the total number of pages in the report, click the "go to last page" icon (as shown above). Note that this could take some time for very long reports.

Search: Entering text (called the "search string") in this box allows you to search for occurrences of the search string in the report. You do not have to enter a complete word, and the search is not case sensitive. For example, searching on the word "park" will find instances of "Park," "park," "Parker," and "spark."

To activate the search, click the "binoculars" icon; it will search for and highlight the next instance in the document of the search string that you have entered in the box. The search will start from the page you are viewing.

Limitations to the Search Function: The Search function only finds the first instance of the search string on a report page. Each subsequent search moves on to the next page of the report. Finally, the Search function highlights the instance of the search string that is found, and moves the cursor to the appropriate position in the report. To be able to click on the "binoculars" icon again to search for further occurrences of the search string, you will have to scroll up to the top of the report.
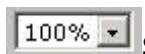
Size: This allows you to magnify or reduce the size of the output on the screen.

CAUTION
Do not hit the Enter key when changing the size. Simply change the desired zoom level and wait. Hitting the Enter key will close the report.

Export and Analyze Data

Most reports can be exported into PDF format, which will maintain the look and feel of the AMRS report. This is most useful when you want to review the report but do not need to manipulate the data.

There are times in which you will want to do your own analysis of the data generated by an AMRS report. Microsoft Excel is an excellent tool for data manipulation; it allows you to reformat, summarize, sort, filter, chart, and create formulas from your facilities management data. Fortunately, it is quite easy to export data from the AMRS Viewer into Excel.

To begin the process of exporting data, simply click the "Export" icon from the AMRS Viewer. This will bring up the Export Options window.
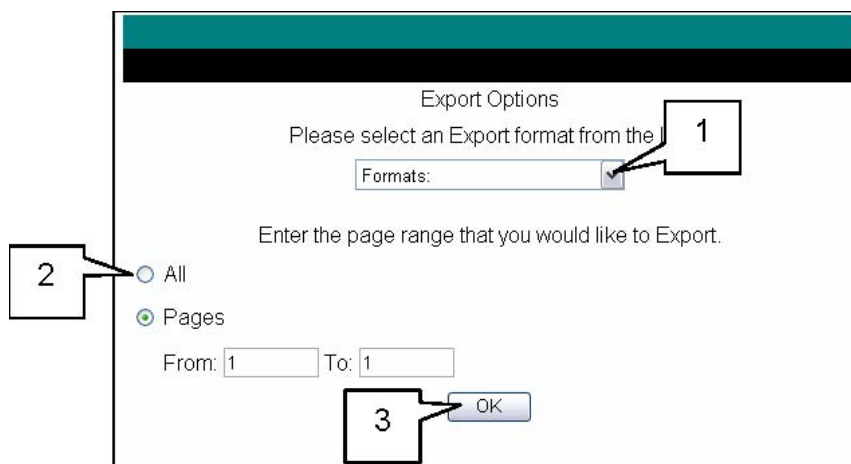
Figure 15: Export Options Window

To complete the exporting process:

1 From the Export Options window, choose **MS Excel 97-2000 (Data only)** or **Acrobat Format (PDF)** as the format from the drop-down menu.
2 Verify that the **All** (for pages to export) button is selected.
3 Click the **OK** button to export. You will then be prompted to save the exported file (the default file name is CrystalViewer.xls, but you can change that)

If you have exported the data to MS Excel, you can open the file in Microsoft Excel, and manipulate the data using any Excel features.

CAUTION
Not all reports are suitable for an Excel format. Those reports that are optimized for exporting to Excel are labeled as such.

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Figure 16: Example of Exported Excel Spreadsheet

NOTE: Some reports will actually provide a parameter specifying the format in which the report will be generated. If you intend to export your report to Excel, then choose "Excel" when this parameter becomes available (*see* Figure 17).

Figure 17: Window of the Print/Excel Drop-Down Menu

Otherwise, choose Print. By choosing Excel, you are instructing AMRS to generate a more "stripped down" version of the report: one which contains all of the data, but no extraneous formatting. This makes importing into Excel cleaner.

Function and Use of the Schedule Option
Rather than run the report right away, you can schedule the report to run sometime in the future. Based upon your needs, you may choose to run a report once, or establish a schedule to run reports at a given time, such as every day, week, or month.

Once scheduled reports have been generated, there are several destinations to which you can automatically send them, including your e-mail inbox. Each of the available options is discussed in the *Destination* section below.

To schedule a report, select the Schedule option for the report. The Schedule window will appear.
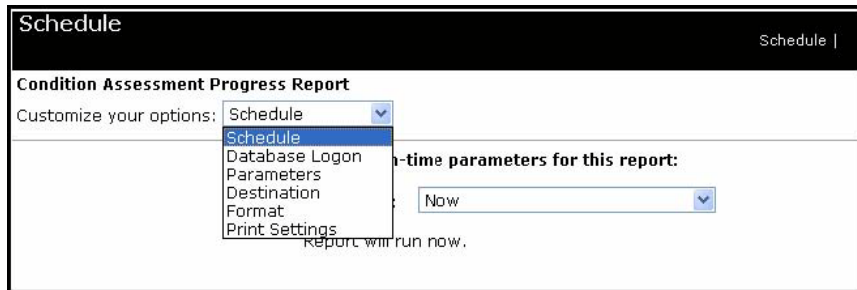
Figure 18: Schedule Window

Each item in the options drop-down menu has default values. You should check each item to make sure that the default values are correct. After you have concluded making changes to a page, be sure to click the page's Update button (if one is available).

To schedule and run a report, you will need to perform actions involving each one of the six options that make up the Schedule drop-down menu: Schedule, Database Logon, Parameters, Destination, Format, and Print Settings.

Schedule
The Schedule option allows you to specify how frequently you want a report to be generated (*see* Figure 19, below).
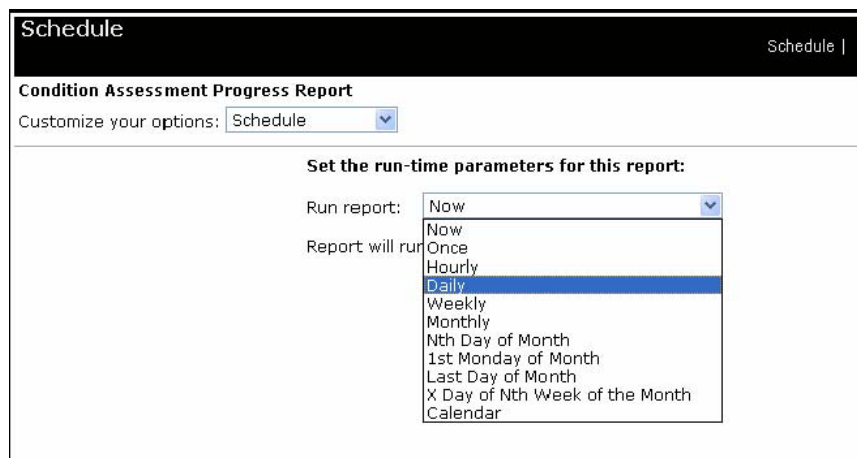
Figure 19: Schedule Options

Each of the choices will open a different screen. Fill out the appropriate fields on the scheduling screen. For example, selecting "Daily" will take you to the Daily window.

Figure 20: Schedule Daily

Fill out the appropriate fields in the window. You can set up a report to run every day or every other day by changing the field, Days(N). When the Days(N) field is set at 1, the report will run every day. If it is set to 2, then it will run every other day.

CAUTION

When you change the date interval (labeled "Days(N)="), you have to click the Update button for the change to take effect.

Database Logon
You should not modify anything on this screen; you can skip it.

Parameters
You should fill out the parameters for a scheduled report in the same way as you would when generating an interactive report. Figure 21shows an example of the parameters associated with the report "Work Order Cost By Location." Note that these parameters are the same as those that would be used if the report were generated interactively.

Figure 21: Report Scheduling Parameters Window

CAUTION
You must fill in all of the parameters for a report to run correctly. When running a report under the View action option, you will be prompted to enter any missing parameters. However, when scheduling a report, the system will *not* tell you whether you have forgotten to enter a parameter. It is very important to ensure you have entered all parameters when scheduling a report or the report will not run correctly.

Destination
Destination refers to the location to which the report output is sent after it has been generated. The available options are illustrated in Figure 22, below.

Figure 22: Destination Window

These are the choices available from the Destination drop-down menu.

Default: The Default choice saves the report output in the AMRS' file structure. You can then view the results directly from the History window in Figure 26. This is the typical option, but it requires you to log into the AMRS to view the results of your scheduled report.

Unmanaged Disk: Unmanaged Disk allows the user to change the file destination, but the destination must be part of the Enterprise network. This option is not supported.
Email: This allows you to email the output to an email address. See Figure 23 for more details.
FTP: Do not choose the FTP option. It is disabled.

<u>Email Option Walk-through</u>
If you wish to email the output to an email address, select Email from the Destination drop-down menu. The Email Option window will open:

Figure 23: Email Option Window

Once this window has opened, follow the steps below to email your report (output).

1 Click on the **Set the values to be used** button to set email options.

2 Enter your email address or the address of the person to whom you want to send the output in both the "from" and "to" fields. Note that the email address must be in a valid email address in Internet email format (e.g., betsy_dodson@nps.gov).

3 Use the **cc** field to send reports to other recipients.

4 Enter the name of the report in the subject line.

5 Fill in any text that you want to go in the message body in the "Message" box.

6 Verify that the box labeled "Attach report instance to email message" is checked to ensure that the report results are actually attached to the message.

    a. Add a specified file name if you do not want a default file name of random characters to be assigned to your report

7 Click on the update button after you have filled in all the fields.

The report will be sent to the designated addresses.

Format

"Format" refers to the file format of the report to be generated. *See Figure 30 on pages 31-32 for a description of the different file formats.*
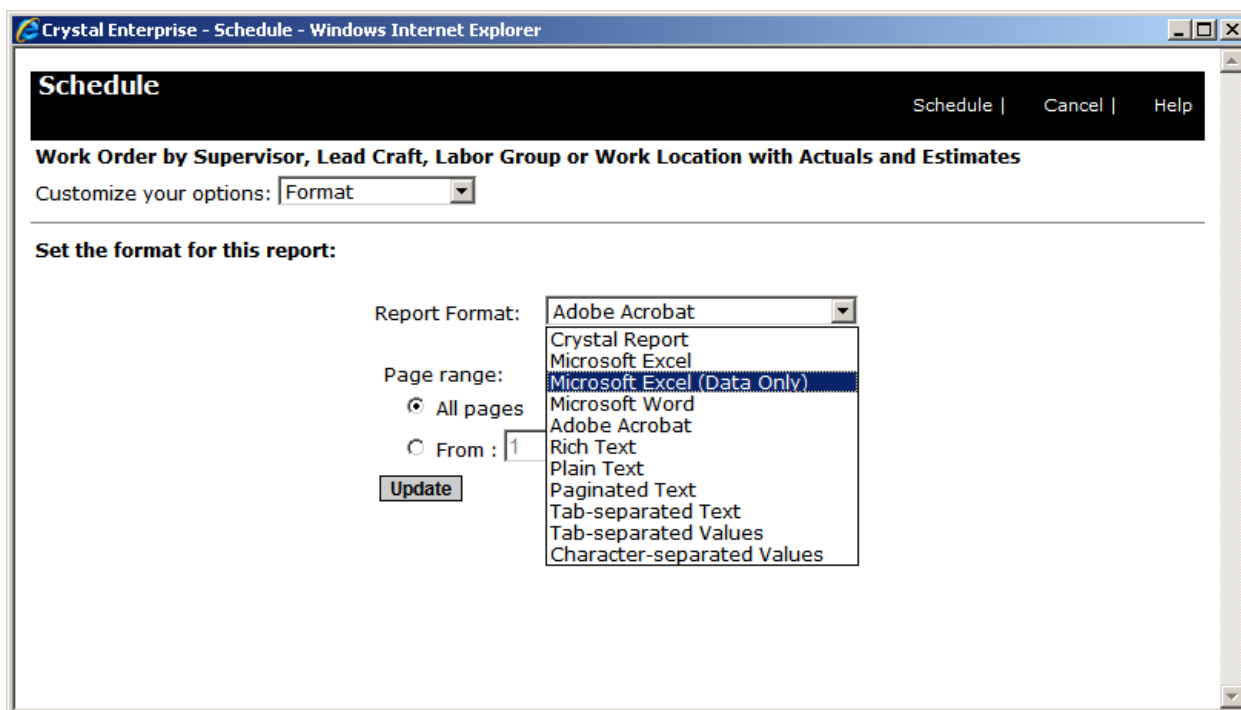
Figure 24: Report Format Window

While Crystal Report is the most common and flexible report format, you can only view Crystal Report-formatted files if you are logged into the AMRS or if you have the AMRS program installed on your own computer.

NOTE: If you plan to have the results of the report e-mailed to you or wish to distribute it to others who do not have access to the AMRS, then do not use the Crystal Report format. Instead, generate the report in alternative programs, such as Microsoft Excel or Adobe Acrobat. Microsoft Excel is the recommended format if you want your recipient to be able to manipulate the data further. Adobe Acrobat is the recommended format if you want the recipient of the report to be able to print and view the results but not manipulate the data.

CAUTION

It is very important to remember to click on the schedule tab after completing all the selections, or all the information you have entered will be lost.

Figure 25: Scheduling a Report

Print Settings
Print Settings allow you to modify options associated with the manner in which the finished report is printed. You will not be using this option; instead, you will print the report directly from the AMRS Viewer or Microsoft Word, Microsoft Excel, or Adobe Acrobat, depending on the format in which you are generating the report.

Function and Use of the History Option/Window
When you click on the schedule tab, a window will pop up showing the history of the report and its status.

Figure 26: History Window

To view the report output, click on the date/time field for the instance of the report that you would like to view. The options of instances you may view are illustrated in Figure 26, above.

By clicking on the date/time field "9/16/2004 3:04:17 PM," for example, you will be able to view the output of the report generated at that specific date and time.

To update the status of the reports by refreshing your History Window, click on the "Refresh" tab.

NOTE: You can always go back to the history of instances of the report by clicking on the "History" link for the report, as was illustrated in the *Navigation* section in Figure 6.

You can check on the status of a report by clicking on the words in the Status column. For example, if the report failed you can find out what the error was by looking at the status (as illustrated in Figure 27, below).

Figure 27: Report Status Window

The available statuses are as follows:
- **Success:** The report was generated successfully.
- **Failed:** The report was not generated successfully. Usually, the cause of failure is a parameter that is either not entered properly, or not entered at all.
- **Running:** The report is still running. Click the refresh tab to refresh the history window or check again later. Most reports take between one and 10 minutes, although it may take more during heavy server usage times.
- **Recurring:** The report is scheduled to be re-run automatically, at the interval that was specified when the report was scheduled.
- **Pending:** The report has been scheduled to be run once at some future time.

<u>Deleting a scheduled report and deleting generated reports you no longer need:</u>
To delete a scheduled or generated report, click in the selected box and click the delete button.
You can only delete those items that you created.
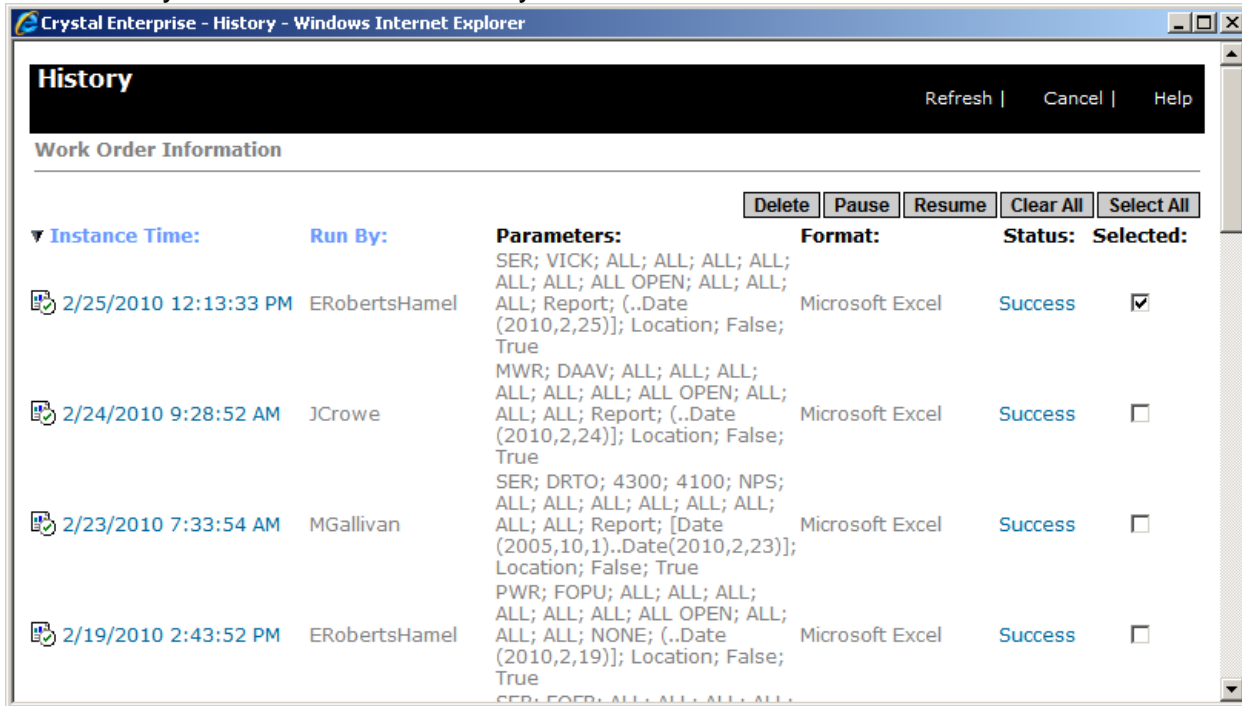
Figure 28: Deleting an Old Report

WHERE TO GO FOR HELP

Once you begin to use the AMRS, you may have questions. To get answers to your questions, you should consult the following sources. They are listed in the order of suggested action.

Park Account Manager
FMP HelpDesk email FMP HelpDesk (in Lotus Notes) or
FMP_Help_Desk@nps.gov
FMP HelpDesk phone 303-969-2609
Regional Coordinator

Figure 29: AMRS Assistance

Requesting a New Report

Most reporting needs can be met through reports that are already in the AMRS. However, if you have a reporting need that is not already in the AMRS you can first try exporting a current report to Excel and reorganizing the data to get the information you need. You can also request a new report through the HelpDesk.

Upon receipt of a request for a new report, it will be evaluated; a recommendation will then be made to either modify an existing report to accommodate the need or pass the new report request on to the systems group for creation.

APPENDIX A: REPORT EXPORT FORMATS

The following are the report export formats supported by AMRS. All of them work for scheduled jobs, but not all work with the AMRS Viewer.

Format	Description	Works with the AMRS Viewer (Yes/No)
Crystal Report	Format requires the AMRS viewer to work with the report. **This option should not be used.**	Yes
Microsoft Excel	File can be opened with Microsoft Excel and includes any formatting, page and report headers, subtotals, etc. Contrast with Microsoft Excel (Data Only).	Yes
Microsoft Excel (Data Only)	File can be opened with Microsoft Excel, but it only includes the data records themselves, without headers, formatting, sub-totals, etc. Best when you want to do additional data manipulation and calculations on the results. This format is also good if you want to import data into Microsoft Access. Contrast with Microsoft Excel format.	Yes
Adobe Acrobat	File can be opened, viewed, and printed by anyone with an Adobe Acrobat PDF viewer. The resulting Acrobat document includes any formatting, graphic images, etc. of the report, and it is formatted exactly as it will print out. Appropriate for sharing presentation-quality reports electronically with others. This is the format that you will most likely use if you want to e-mail the report to others. Not appropriate when additional data manipulation is required.	Yes
Rich Text	File is meant to be imported into a variety of word processing programs. Microsoft Word format is preferable when Microsoft Word is the chosen word processor.	Yes

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Format	Description	Works with the AMRS Viewer (Yes/No)
Plain Text	File strips out all font changes and formatting, leaving a version of the report that can be imported into almost any other program. May be useful for including in e-mail messages to others.	No
Paginated Text	Similar to Plain Text, but it includes pagination information (any page breaks, page footers, etc.).	No
Tab-separated Text	Format provides the data records in the report, and it uses tab characters to separate the individual fields within a record. Also includes any report header and footer information.	No
Tab-separated Values	Provides only the data records themselves. Fields within each record are separated by tab characters. No formatting, headers, or footers are included. This is most likely the format you would use if you wanted to import the results of the report into some other analysis program, such as Microsoft Access, or wanted to provide the data to a third-party for analysis.	No
Character-separated Values	Similar to Tab-separated Values, but it allows you to designate the character used to separate one field from another (unlike Tab-separated Values, which assumes that the tab character is used to separate the values).	No

Figure 30: Report Export Formats

APPENDIX B: REPORT PARAMETER DEFINITIONS AND EXPLANATIONS

The following tables provide more detailed information regarding some of the parameters you might encounter when running a report. If you have further questions about what report parameters mean, you may wish to contact your Park Account Manager (PAM) or the FMP HelpDesk.

Asset Code: Asset codes are used in the FMSS to organize assets into different major asset types. Each asset group is broken up into different asset categories, each of which is identified by its asset code. For example, if an individual wanted to run a report regarding Maintained Landscapes, he or she would look under the asset group "Grounds" and enter "3100" as the Asset Code parameter.

Asset Group	Asset Category	Asset Code	Unit of Measure
SITE/AREA			
	Site/Area	0000	Each
ROAD, PARKING AREA, ROAD BRIDGE, ROAD TUNNEL			
	Road	1100	Miles
	Parking Area	1300	Square Feet
	Road Bridge	1700	Square Feet
	Road Tunnel	1800	Square Feet
TRAIL			
	Trail	2100	Lineal Feet
	Trail Bridge (Substantial)	2200	Square Feet
	Trail Tunnel (Substantial)	2300	Square Feet
GROUNDS			
	Maintained Landscapes	3100	Acres
	Boundary	3800	Lineal Feet
BUILDING			
	Building	4100	Square Feet
	Housing	4300	Square Feet
UTILITY			
	Water System	5100	Gallons per day
	Waste Water System	5200	Gallons per day
	Heating & Cooling Plant	5300	Each
	Electrical System	5400	Each
	Radio System	5500	Each
	Phone System	5510	Each
	IT System (i.e. LAN)	5520	Each
	Fuel System	5700	Each
	Solid Waste/Recycling System	5800	Cubic Yards
MARINE / WATERWAY/ WATERFRONT			
	Dam/Levee/Dike	6100	Cubic Yards

Asset Group	Asset Category	Asset Code	Unit of Measure
	Constructed Waterway	6200	Miles
	Marina/Waterfront System	6300	LF of shoreline
AVIATION/ RAILROAD			
	Aviation System	6400	Square Feet
	Railroad System	6500	Lineal Feet
UNIQUE ASSETS (Not already covered in other Asset Codes)			
	Outdoor Sculptures/ Monuments/ / Large Interpretive Objects	7100	Each
	Maintained Archeological Sites	7200	Square Feet
	Fortification	7300	Square Feet
	Towers/Missile Sites	7400	Each
	Interpretive Media	7500	
	Airstrip	7800	
	Amphitheaters	7900	Number of Seats
FLEET			
	Fleet	8999	Each
NO CODE			
	No Asset Code Available	9999	Each

Asset Status: Asset status refers to the current functionality of an asset. Asset status may be useful in identifying possible management actions to be taken regarding that asset or in inventorying the asset portfolio.

Review the definitions and examples below for the different asset statuses.

Asset Status	Definition and Examples
Operational	**Definition:** Asset is occupied and used in support of the park mission and operations, or asset is not operational but supports the park mission and operations as a "maintained asset." **Examples:** • Asset (E.G. roads, trails, landscapes, campgrounds, buildings, utilities, dams, waterways) that is currently in use or being rehabilitated for a specific use. • Asset that is "vacant" but supports the park mission as an unoccupied asset (historic buildings, ruins or fortifications).
Operational/ Obsolete	**Definition:** Asset that is operational and obsolete/functionally deficient for any reason, including: • Asset is undersized for its current use (does not meet functional demands/requirements). • Asset does not meet applicable codes and regulations. **Examples:** • Visitor center that was planned and constructed for a significantly smaller visitor population than is currently being served. • Utility (water treatment plant, fuel system) that does not meet governing codes and regulations.

Asset Status	Definition and Examples
Planned	**Definition:** Asset that is planned or under construction, from initial planning stages until the new asset has been accepted by NPS (at which time the asset becomes operational). **Example:** Any planned asset, including roads, campgrounds, buildings, utilities, etc.
Excess	**Definition:** Asset does not meet the park's mission or is not required for operations (although it may be convenient to use). • Asset does not relate to a future desired condition in the park unit. • Asset's removal is determined by the park's General Management Plan (GMP). **Example:** Any asset that is, or should be, slated for demolition.
Inactive	**Definition:** Asset is vacant and not being used for park mission or operations, and the asset's future use is not imminent. **Example:** Assets that require "mothballing" for potential future reuse.
Removed	**Definition:** Asset was once a part of the inventory, but has since been removed by the park. **Example:** Demolished buildings or other assets.
Not Applicable	**Definition:** For asset location records that are not asset-specific. **Examples:** • • A site or area such as the park or district • Fleet asset location records

Figure 31: Asset Status Definitions and Examples

Labor Code: Every employee involved in maintenance has an FMSS labor record associated with a number labor code. The labor record contains the person's name, park unit, and pay rate, along with other information. The labor code is used to enter the hours an employee worked and can also be used to track projects on which he or she worked. Once an individual is assigned a labor code he or she keeps it forever, even if they move to another park or if they are a seasonal employee.

If you need to enter an individual's labor code as one of the parameters to run a report, see your PAM for the correct labor code.

Location and Asset Records Numbers: As location records and asset records are entered into the FMSS, they are each given a numerical code which can be used to identify that specific location record or asset record. If you need to enter a location or asset number as one of the parameters to run a report, see your PAM for the correct number.

Supervisor Code: Just as employees have their own FMSS labor code, supervisors also have a labor code associated with them. The supervisor's labor code can be used in the supervisory field to track projects and who is responsible for the project.

If you need to enter a supervisor code as one of the parameters to run a report, see your PAM for the correct supervisor's labor code.

Work Types and Sub-Work Types: As work orders are entered into the FMSS, they are assigned different work types and sub-work types. These categorizations identify more specifically the type of work that is occurring, making it possible to run reports for certain types of work occurring in the park.

When entering work types and sub-work types as report parameters, use the table below to understand how each is defined.

Work Type	Sub-Work Type	Description
Capital Improvements (CI)		Alterations or new construction that helps an asset better meet its intended purpose. Examples include paving an unpaved parking area and replacing portable restrooms with a permanent facility in a frequently visited area.
	Alterations (CI-AL)	Changes to interior arrangements or other physical characteristics of an existing facility or installed equipment so it can be used more effectively for its currently designated purpose or adapted to a new use. Includes work referred to as improvement, conversion, remodeling, and modernization.
	New Construction (CI-NC)	Construction that adds to the existing footprint of an asset or creates a new asset.
	Energy Policy (CI-EP)	Retrofitting to reduce energy use, or increase sustainability and reduce carbon footprint.
	Legislatively Mandated (CI-LM)	Not specifically identified by another sub-work type.
	Legislative Mandate Accessibility (CI-LMAC)	Deficiencies that must be corrected in response to regulatory requirements. These activities include retrofitting for accessibility.
	Legislative Mandate Code Compliance (CI-LMCO)	Deficiencies that must be corrected in response to regulatory requirements. These activities include retrofitting for code compliance and removing hazardous materials.
	Legislative Mandate Fire/Structure (CI-LMFS)	Deficiencies that must be corrected in response to regulatory requirements related to structural fire protection codes.
	Legislative Mandate Life/Safety Code (CI-LMLS)	Deficiencies that must be corrected due to regulatory requirements related to safety codes.

Work Type	Sub-Work Type	Description
Facility Maintenance (FM)		Day-to-day activities, as well as planned work, required to preserve an asset in such a condition that it may be used for its designated purpose over its expected life cycle. Examples include routine replacement of HVAC filters, repairing a roof that was damaged in a storm, and building a ramp to meet accessibility laws.
	Preventive Maintenance (FM-PM)	Regularly scheduled periodic maintenance activities (within 1 year) on selected equipment.
	Recurring Maintenance (FM-RM)	Work activities that recur based on normal wear patterns on a periodic cycle of greater than 1 year and less than 10 years. Typical work includes painting, caulking, sealing, carpet replacements, etc.
	Corrective Maintenance (FM-CM)	Unscheduled reactive repairs that would not be estimated and planned, but are accomplished by local staff or existing service contractors.
	Component Renewal (FM-CR)	The planned replacement of a component or system that will reach the end of its useful life based on condition and life cycle analysis within the facility's lifetime.
	Demolition (FM-DM)	Removal of an asset that has been determined to be unsafe or no longer meets mission goals. Removal is determined by management in conjunction with NPS planning procedures.
	Emergency Maintenance (FM-EM)	A maintenance task carried out to avert an immediate hazard or to correct an unexpected failure.
	Inspection Accessibility Assessment (FM-INAC)	
	Inspection Condition Assessment – Annual (FM-INCAA)	Annual.
	Inspection Condition Assessment – Comprehensive (FM-INCAC)	Comprehensive.
	Inspection Fire Protection Life Safety (FM-INFLSA)	
	Inspection Fire Protection Condition Assessment (FM-INFPCA)	
	Inspection Other Types of Inspection (FM-INOTH)	

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Work Type	Sub-Work Type	Description
	Deferred Maintenance (FM-DM)	Maintenance that was not performed when it should have been or was scheduled and was put off or delayed. Continued deferment of maintenance will result in deficiencies.
	Legislative Mandate Accessibility (FM-LMAC)	Deficiencies that must be corrected in response to regulatory requirements. These activities include retrofitting for accessibility.
	Legislative Mandate Code Compliance (FM-LMCO)	Deficiencies that must be corrected in response to regulatory requirements. These activities include retrofitting for code compliance and removing hazardous materials.
	Legislative Mandate Fire/Structure (FM-LMFS)	Deficiencies that must be corrected in response to regulatory requirements related to structural fire protection codes.
	Legislative Mandate Life/Safety Code (FM-LMLS)	Deficiencies that must be corrected due to regulatory requirements related to safety codes.
	Component Renewal, Deferred Maintenance (FM-CRDM)	A component renewal work type that has been tracked in the system and facility management practice and is not funded when identified as Deferred Maintenance will then move in the Component Renewal Deferred Maintenance work type category.
	Recurring Maintenance, Deferred Maintenance (FM-RMDM)	Recurring maintenance that has been identified and tracked in the system and facility management practices and is not funded when required will move into this work category.
Facility Operations (FO)		Work activities performed on a recurring basis related to the normal performance or function of an asset throughout the year which intends to meet daily operational needs and activities for which a facility or item of Installed Building equipment (IBE) is intended to be used. Typical work performed under operations includes janitorial and custodial services, snow removal, purchases of utilities (water, sewer, electricity), grounds keeping, waste management, etc.

Work Type	Sub-Work Type	Description
	Activate and Deactivate (FO-AD)	Typically seasonal driven opening and closing of an asset for operation. Weatherizing or securing asset systems prior to the closed period and start-up and testing of asset systems to begin the opening period.
	Custodial (FO-CU)	Standard custodial tasks performed at various frequencies (daily, weekly, monthly, etc.) for functional spaces within a given asset. Sweeping, mopping, trash collection, restroom cleaning, etc.
	Grounds Care (FO-GC)	TBD by maintained landscape group
	Operate Plant/System (FO-PS)	Periodic actions that eliminate or protect facilities from pests which encompass insects, rodents, nematodes, fungi, weeds, and other forms of terrestrial or aquatic plant or animal life or virus, bacteria, or other form of microorganism.
	Refuse Collection (FO-RC)	Refuse/recycling collection begins after refuse has been collected from individual rooms and placed in an intermediate container. Includes the emptying of the intermediate container into a dumpster and emptying the dumpster at an approved landfill or transfer station.
	Snow/Sand/Debris (FO-SN)	Activities performed to ensure safety from unanticipated hazards and obstructions. Removal or precautions applied to roads, parking, trails, roofs, beaches, waterways, and sidewalks.
	Utilities Cost (FO-UT)	Services and commodities used to operate facilities that are delivered by pipeline or other line. Includes sewer, water, electrical, natural gas, and propane, and energy, water or wastewater that is generated or treated onsite, purchased from a municipal system or from a private supplier.
	Business (FO-BU)	Activities not directly associated with a constructed asset that pertain to the labor hours and leave of park employees. Annual leave, sick leave, compensatory time taken, holiday, admin leave, LWOP regular, AWOL, non-duty career seasonal and furlough, and suspension hours.

Work Type	Sub-Work Type	Description
	Management (FO-MG)	Activities not directly associated with a constructed asset that pertain to the overall management and administration of the park. Communications, shop management and control, shop inventory management and control, meetings, trainings, reports, FMSS, supervision, planning, field investigation or quality checks, budget, payroll, personnel, office administration and partnership.

Figure 32: Work Types and Sub-Work Types

APPENDIX C: GLOSSARY OF TERMS

See *Inside NPS* for glossary.