# Equipment tools: depreciation, policies and parts

## Overview

This page covers the tools on the Equipment screen that calculate depreciation, assign maintenance policies, and open the policy and part grids:

- **Calculate Depreciation** recalculates depreciation for all qualifying equipment up to a month-end date.
- **Assign Policies** opens a window where you assign policies to a piece of equipment or remove them. A separate screen assigns one policy to many equipment items.
- Tab buttons in the **Equipment Information:** panel open the Policy, Policy List, Part and Part List grids.

## Before you begin

- Sign in to IRIS10 and work in the Equipment Management System portal.
- Know how to select rows and use the toolbar on a grid. See Data grid overview and basics and Grid viewing and editing.
- To calculate depreciation, you need access level 4 or higher on Equipment. See Security Administration: access levels by user.
- Fill in the Depreciation UOM and the cost, life and purchase details on the equipment records you want depreciated.

## Procedure

### Calculate depreciation for all equipment

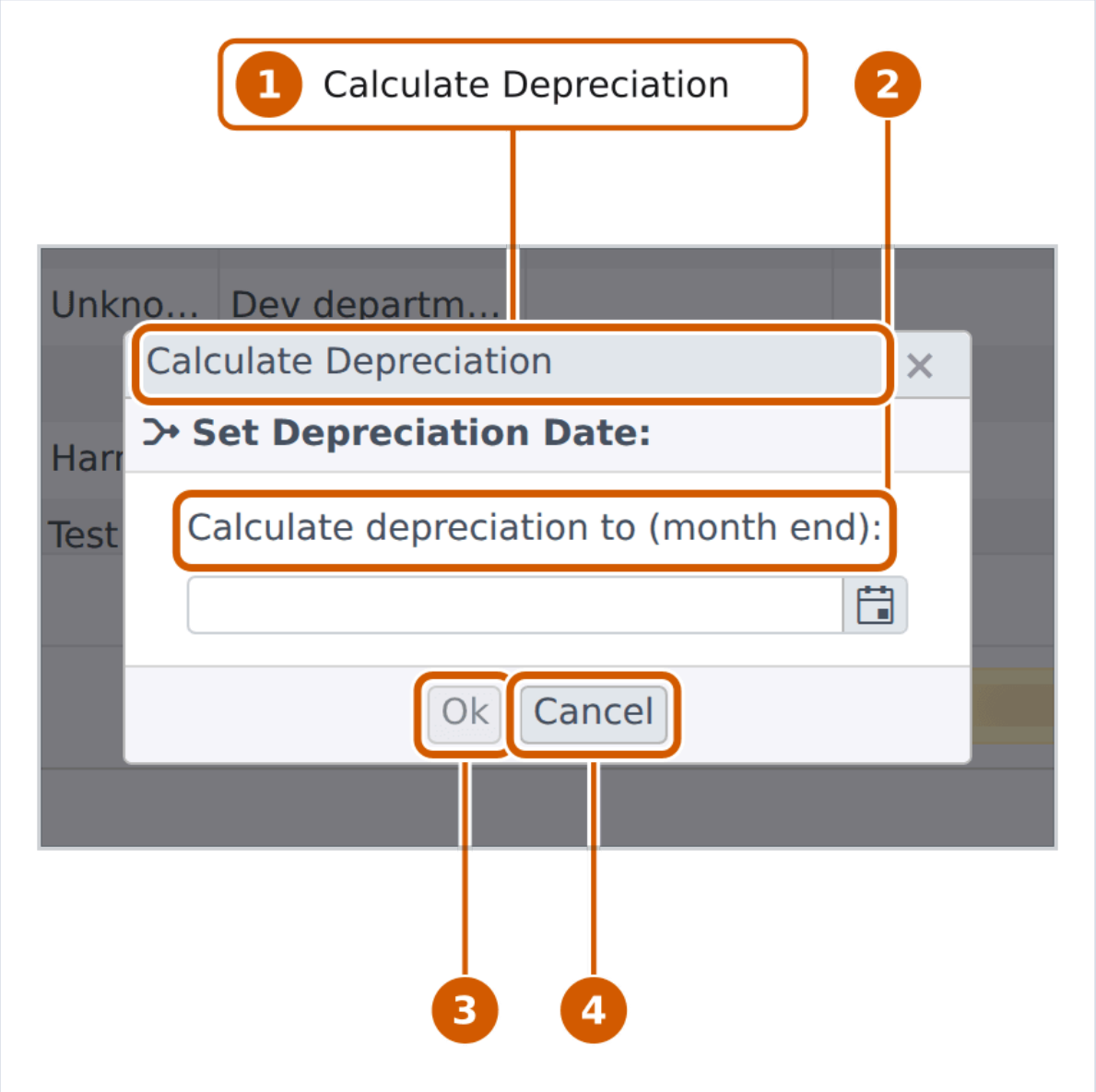
> **Important: Ok** in the Calculate Depreciation window recalculates every qualifying equipment record at once, whatever rows you have selected or filtered, and there is no further confirmation.

1. On the Equipment screen, open the Calculate Depreciation window:

| ROUTE | WHERE | WHAT OPENS |
|---|---|---|
| Toolbar | Click the Calculate Depreciation toolbar button (tooltip "Click to calculate depreciation.") | The **Calculate Depreciation** window |
| Main menu | Choose **Options** > **Calculate Depreciation** | The **Calculate Depreciation** window |

The window opens with the heading **Set Depreciation Date:**, an empty date picker, and **Ok** and **Cancel** buttons. **Ok** is disabled.

> **Note:** This step requires access level 4 or higher on Equipment.




*The Calculate Depreciation window. Ok becomes available once you choose a month-end date.*

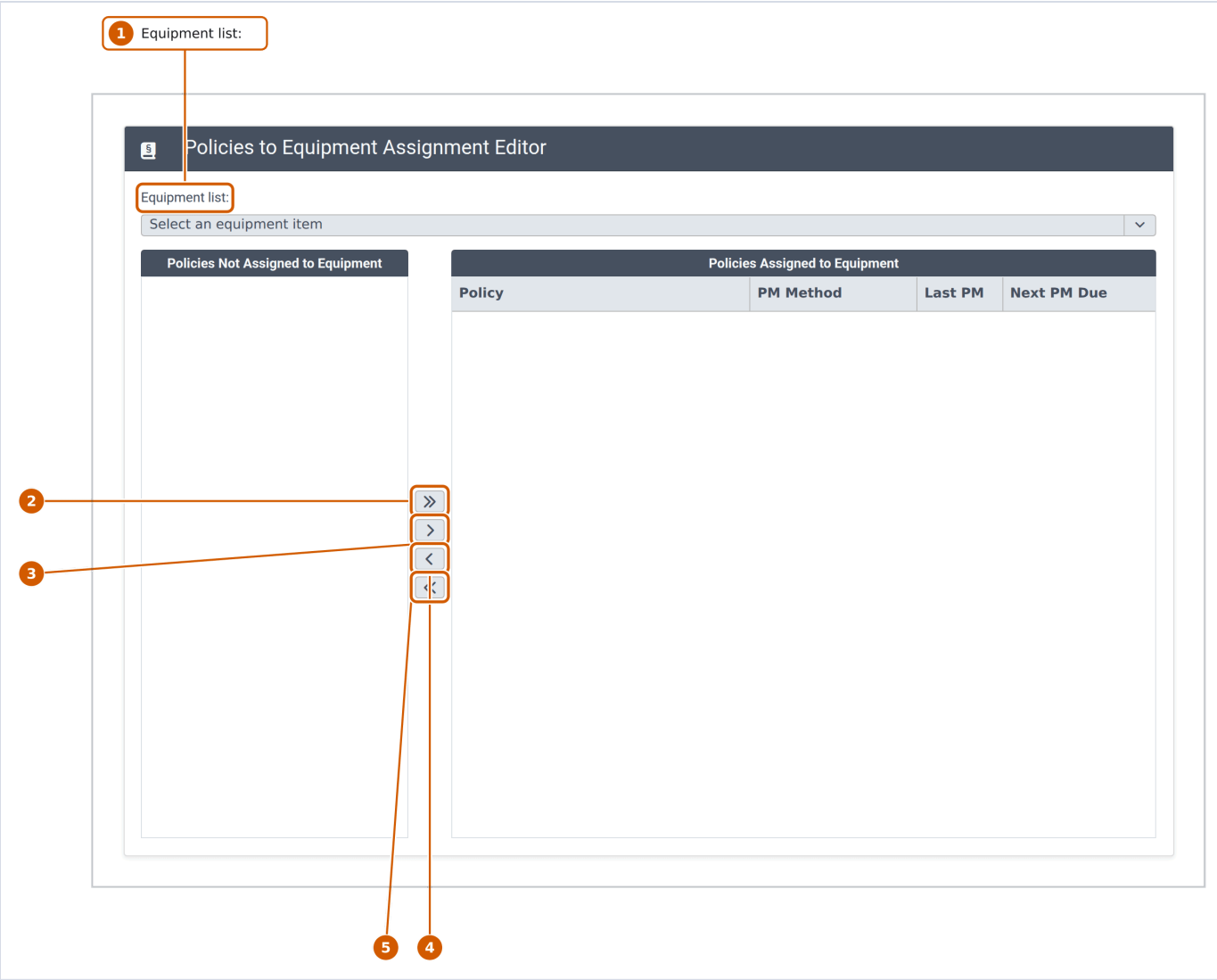
1. Calculate Depreciation
2. Calculate depreciation to (month end):
3. Ok (disabled until a date is chosen)
4. Cancel

2. In **Calculate depreciation to (month end):**, choose the month-end date to calculate depreciation to. **Ok** becomes available once a valid date is chosen. If the entry is not a date, the message "Please enter a valid date." appears. The month you choose counts as a whole month.

3. Click **Ok**. IRIS10 shows a loading indicator and recalculates depreciation for all qualifying equipment at once, whatever rows are selected or filtered. The window closes and the message "Depreciation was recalculated for N equipment records." (or "...for 1 equipment record.") appears. N counts only the qualifying records. The Equipment grid reloads to show the new values. No notification is sent.
4. To leave without calculating, click **Cancel** instead of **Ok**. The window closes and nothing is calculated.

## Open the policy assignment for a piece of equipment

1. On the Equipment screen, select the equipment row in the grid. The row is selected. If you click a tab button without a selected row, the message "Select an equipment record first." appears.
2. In the **Equipment Information:** panel below the grid, click the **Assign Policies** tab button. A window titled **Assign Policies** opens with the same assignment screen as Policies to Equipment Assignment Editor. **Equipment list:** already shows the selected equipment, and both policy lists load.




*Assigning policies to a piece of equipment. Each arrow saves as soon as you click it.*

1. Equipment list:
2. Assign all
3. Assign one
4. Unassign one
5. Unassign all

> **Important:** The assign screens have no Save button. Every arrow click, including assign all and unassign all, saves at once with no confirmation.

## Assign policies to a piece of equipment

1. If **Equipment list:** is empty, choose the equipment. You can type part of its name or description to filter the list. The **Policies Not Assigned to Equipment** list (left) and the **Policies Assigned to Equipment** list (right) show the policies for that equipment.

2. To assign one policy, select it in **Policies Not Assigned to Equipment**. The policy is selected.
3. Click the assign-one arrow (tooltip "Click to assign the selected policy to the selected equipment item."). The assignment saves at once, with no confirmation. A message "The policy: <name> was assigned to equipment item: <equipment>." appears for about 4 seconds, and both lists refresh. The new assignment starts with Last PM 0.
4. To assign every remaining policy, click the assign-all arrow (tooltip "Click to assign all policies to the selected equipment item."). All active policies not yet assigned are assigned at once, with no confirmation. Each starts with Last PM 0 and a blank Next PM Due. The message "All policies assigned for the selected equipment item." appears.

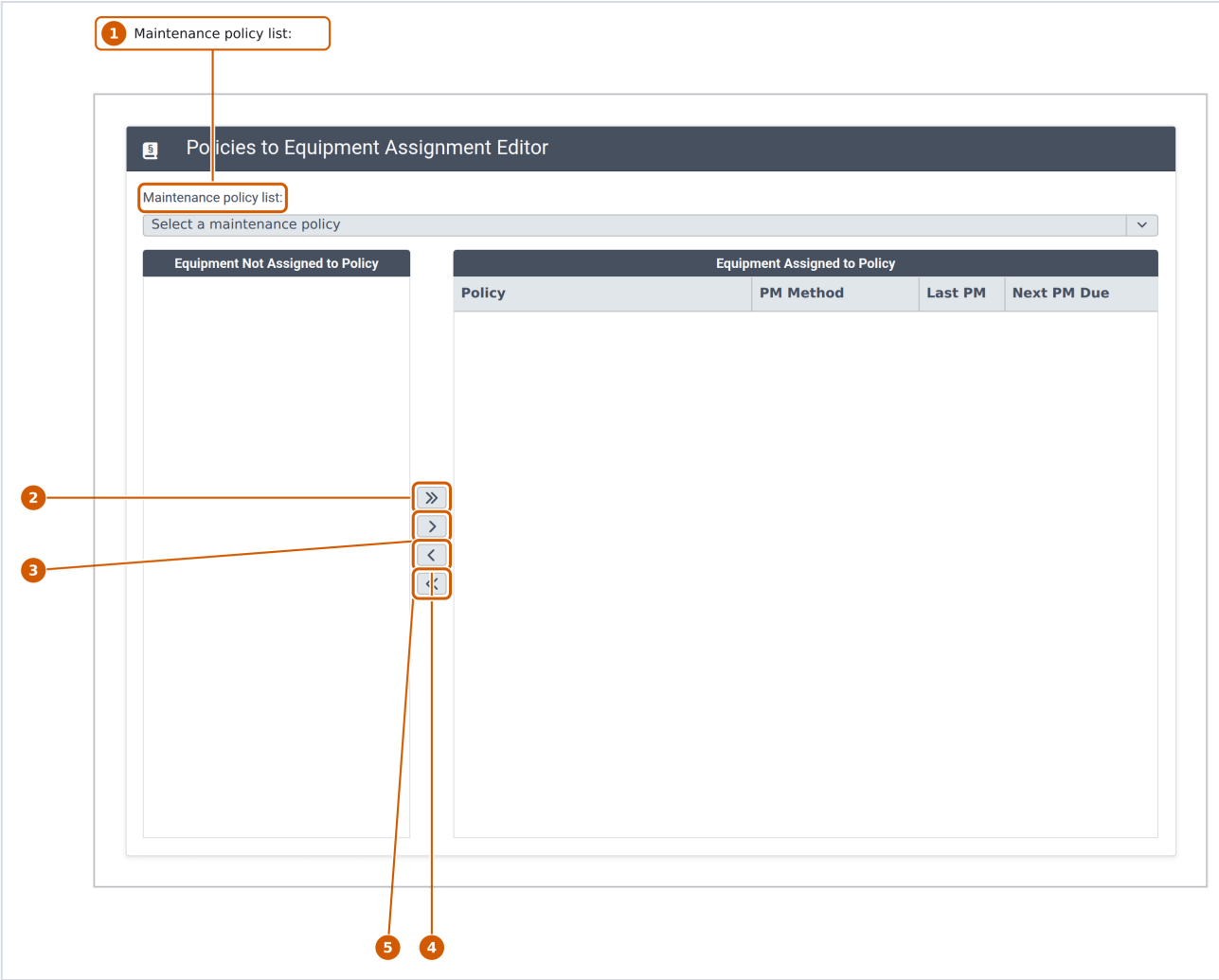
## Unassign policies from a piece of equipment

1. To unassign one policy, select it in **Policies Assigned to Equipment**. The policy is selected.
2. Click the unassign-one arrow (tooltip "Click to unassign the selected policy from the selected equipment item."). The assignment is removed at once, with no confirmation, together with that equipment's PM schedule for the policy (Last PM, Next PM Due) and the assignment's comments and documents. A message "The policy: <name> was unassigned from equipment item: <equipment>." appears and both lists refresh.
3. To remove every policy from the equipment, click the unassign-all arrow (tooltip "Click to unassign all policies from the selected equipment item."). All assignments and their PM schedules are removed at once, with no confirmation. The message "All policies unassigned for the selected equipment item." appears.

> **Important:** Unassigning a policy removes that equipment's PM schedule for the policy, including Last PM and Next PM Due. Only the single unassign arrow also deletes the assignment's comments and documents. Unassign all removes the assignments and their PM schedules without that step.

## Assign a policy to many equipment items

1. Open the policy-to-equipment assignment screen (browser path `/ems/policyequipassign`). The screen shows **Maintenance policy list:** and the lists **Equipment Not Assigned to Policy** (left) and **Equipment Assigned to Policy** (right), with four arrow buttons between them.




*Assigning one maintenance policy to many equipment items.*

1. Maintenance policy list:
2. Assign all
3. Assign one
4. Unassign one
5. Unassign all

2. In **Maintenance policy list:**, choose the policy. You can type part of its name to filter the list. The equipment lists load for that policy.
3. Click the assign-all arrow (tooltip "Click to assign all the equipment items to the selected policy.") to assign every remaining equipment item. The assignment saves at once, with no confirmation. Assign all adds only active equipment not yet assigned to the policy. Each new assignment starts with Last PM 0 and a blank Next PM Due.
4. Alternatively, select equipment and click the assign-one arrow (tooltip "Click to assign the selected equipment items to the selected policy."). The assignment saves at once, with no confirmation.
5. To remove one equipment item, click the unassign-one arrow (tooltip "Click to unassign the selected equipment item from the selected policy."). The assignment and the equipment's PM schedule for the policy are removed at once, with no confirmation.

6. To remove all equipment, click the unassign-all arrow (tooltip "Click to unassign all equipment items from the selected policy."). The assignments and the equipment's PM schedule for the policy are removed at once, with no confirmation.

# Reference

## Depreciation methods (by Depreciation UOM)

Depreciation is calculated only for equipment that meets its method's criteria.

| DEPRECIATION UOM | EQUIPMENT INCLUDED ONLY IF | HOW DEPRECIATION IS WORKED OUT | LIMIT |
|---|---|---|---|
| Years | Total cost above 0, expected life above 0, and a purchase date before the month after the chosen date | Straight line: (total cost − salvage value) ÷ expected life ÷ 12, times the whole months from the purchase date to the end of the chosen month | After the expected life has passed, depreciation stays at cost minus salvage value and the current-year amount is 0 |
| Miles | Expected life above 0, purchase price above 0, a purchase date and a last miles reading | ((purchase price + setup cost − salvage) ÷ expected life) × last miles reading | Capped at purchase price plus setup cost minus salvage |
| Hours | Expected life above 0, purchase price above 0, a purchase date and a last hours reading | ((purchase price + setup cost − salvage) ÷ expected life) × last hours reading | Capped at purchase price plus setup cost minus salvage |

Miles-based equipment uses its last miles reading, and hours-based equipment uses its last hours reading. See Reading updates. For units of measure and fiscal years, see Units of measure, fiscal years and organizations.

## Calculate Depreciation window

| ITEM | WHAT IT DOES |
|---|---|
| Set Depreciation Date: | Heading of the window |
| Calculate depreciation to (month end): | Date picker for the month-end date. Starts empty each time the window opens. |
| Ok | Disabled until a valid date is chosen. Recalculates all qualifying equipment at once. |
| Cancel | Closes the window without calculating |

## Arrow buttons on the equipment-to-policies screen

| BUTTON | TOOLTIP |
|---|---|
| Assign all | Click to assign all policies to the selected equipment item. |

| BUTTON | TOOLTIP |
|---|---|
| Assign one | Click to assign the selected policy to the selected equipment item. |
| Unassign one | Click to unassign the selected policy from the selected equipment item. |
| Unassign all | Click to unassign all policies from the selected equipment item. |

## Arrow buttons on the policy-to-equipment screen

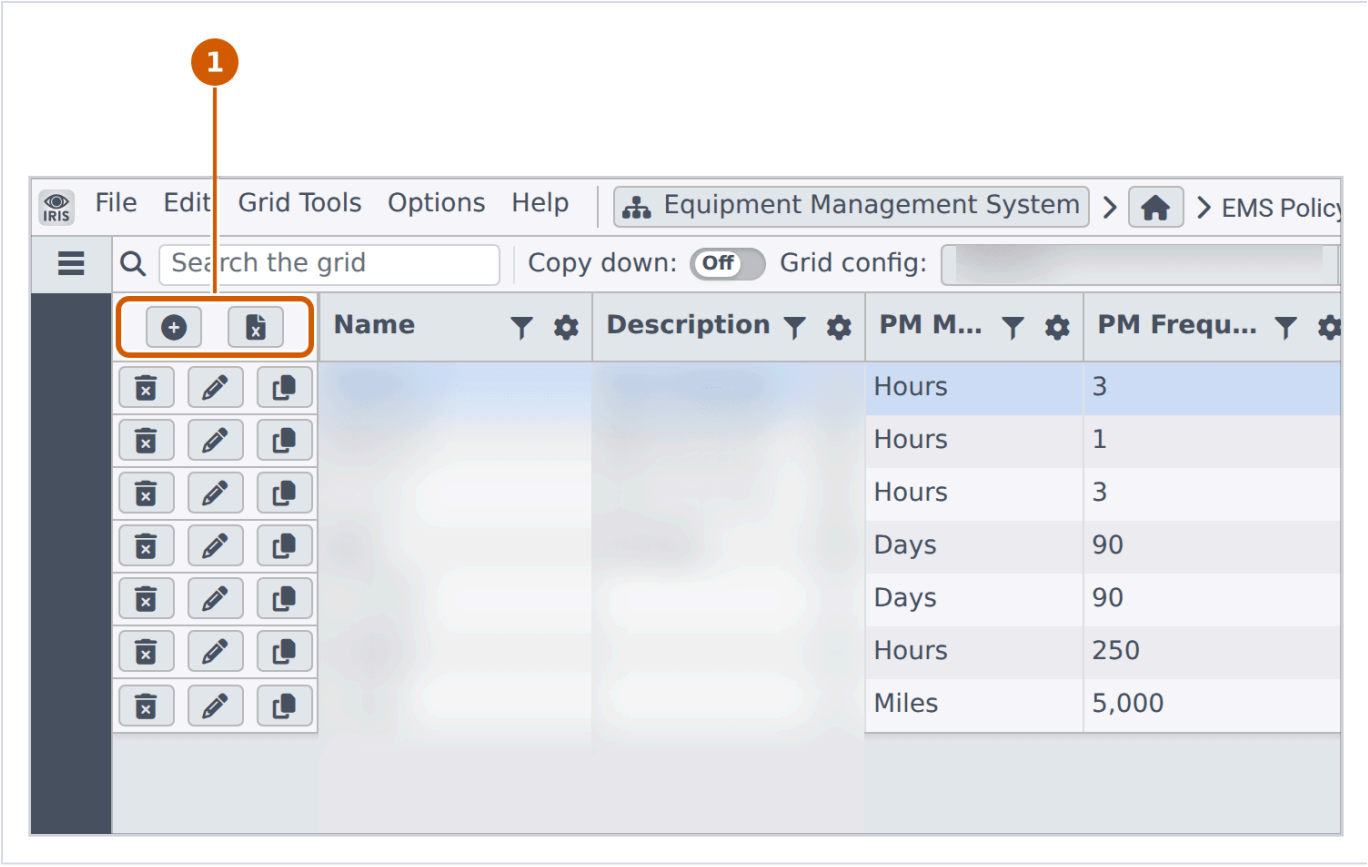
| BUTTON | TOOLTIP |
|---|---|
| Assign all | Click to assign all the equipment items to the selected policy. |
| Assign one | Click to assign the selected equipment items to the selected policy. |
| Unassign one | Click to unassign the selected equipment item from the selected policy. |
| Unassign all | Click to unassign all equipment items from the selected policy. |

## Assigned-list columns on both assign screens

| COLUMN | SHOWS |
|---|---|
| Policy | The assigned item |
| PM Method | The policy's PM method |
| Last PM | The last PM value; 0 for a new assignment |
| Next PM Due | When the next PM is due; blank for a new assignment |

## Policy, Policy List, Part and Part List grids

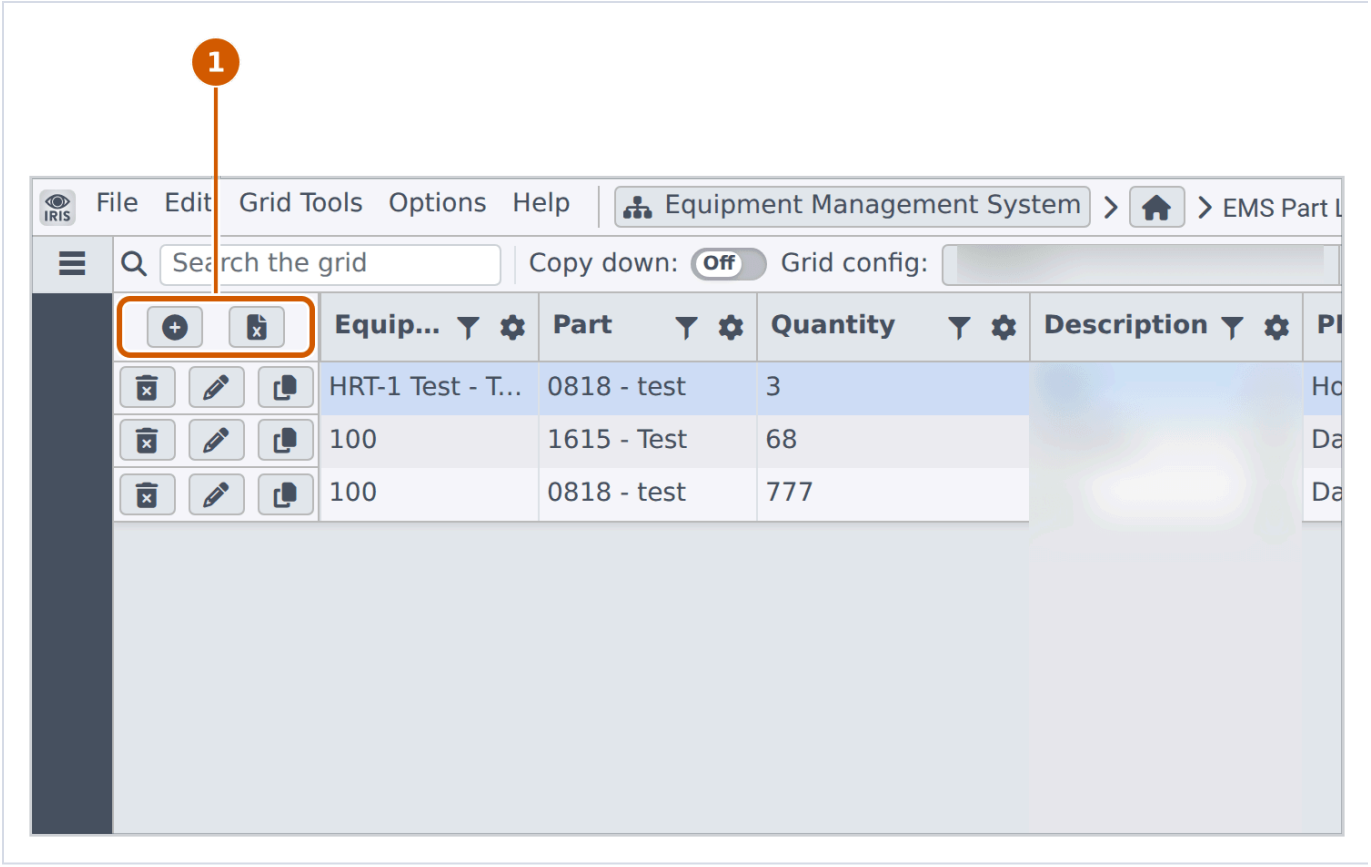
Policy, Policy List, Part and Part List are ordinary grids opened from the Equipment screen's tab buttons. View, filter and edit them as described in Grid viewing and editing.




*The Policy grid lists maintenance policies with their PM method, frequency and warnings.*

1. Grid column headings

The Policy grid has these columns: Name, Description, PM Method, PM Frequency, PM Due Warning Miles, PM Due Warning Hours, PM Due Warning Days, Active, Created Date, Created By, Last Updated Date, Updated By, Notes and Documents.




*The Part List grid shows the parts assigned to equipment.*

1. Grid column headings

The Part List grid has these columns: Equipment, Part, Quantity, Description, PM Method, Created Date, Created By, Last Updated Date, Updated By, Notes and Documents.

## Messages you may see

| MESSAGE | WHEN | WHAT TO DO |
|---|---|---|
| Select an equipment record first. | A tab button was clicked with no equipment row selected | Select a row in the Equipment grid, then click the button again |
| Please enter a valid date. | The depreciation date is not a date | Choose a date from the date picker |
| Depreciation was recalculated for N equipment record(s). | Calculation finished | Review the Depreciation columns in the reloaded grid |
| The equipment depreciation could not be calculated. IRIS Support has been notified. | Calculation failed (a more specific message may appear instead) | Read the message; contact your administrator if it continues |
| Unable to calculate depreciation due to a technical error. An email has been sent to support. | A technical error stopped the calculation | Try again later or contact support |

| MESSAGE | WHEN | WHAT TO DO |
|---|---|---|
| Please select a piece of equipment from the equipment dropdown list before attempting to assign all policies. | Assign all clicked with no equipment chosen | Choose equipment in **Equipment list:** |
| Please select a piece of equipment from the equipment dropdown list before attempting to unassign all policies. | Unassign all clicked with no equipment chosen | Choose equipment in **Equipment list:** |
| There are no unassigned policies to assign to the selected equipment item. | Assign one clicked when every policy is already assigned | No action needed |
| Please select a policy from the unassigned policies list to assign it to the current equipment item. | Assign one clicked with no policy selected | Select a policy in the left list first |
| There are no assigned policies to unassign from the selected equipment item. | Unassign one clicked when nothing is assigned | No action needed |
| Please select a policy from the assigned policies list to unassign it from the current equipment item. | Unassign one clicked with no policy selected | Select a policy in the right list first |
| Unable to assign all the policies for the selected equipment item. | Assign all failed | Try again; contact your administrator if it continues |

## Tips and notes

**Important:** Before it recalculates, IRIS10 sets depreciation to 0 on every equipment record. Equipment that no longer meets its method's criteria (for example, missing cost, life, purchase date or reading) ends with 0 rather than an old value.

**Note:** The count in "Depreciation was recalculated for N equipment record(s)." includes only equipment that met its method's criteria, not all equipment.

**Note:** For Years-based equipment, the current-year depreciation uses a fiscal year from July 1 to June 30.

**Note:** When your county uses Cost Accounting hours for depreciation, only equipment depreciated by Hours has its last hours reading refreshed from Cost Accounting first. See Cost Accounting screen tools.

**Note:** IRIS10 remembers the date of the most recent depreciation calculation.

**Tip:** Assign all skips inactive policies (or inactive equipment on the policy-to-equipment screen) and anything already assigned, so it is safe to use after adding a new policy or piece of equipment.

> **Note:** Removed policy assignments are kept in the audit history.

> **Tip:** The tab buttons in the **Equipment Information:** panel (for example **Edit Last PM**, **Assign Parts**, maintenance history, costs and work order) open the related screen in a new browser tab, filtered to the selected equipment. **Assign Policies** opens a window instead. The chevron button ("Close the equipment information panel.") collapses and expands the panel. For maintenance history, see Equipment maintenance history.

> **Important:** Before it opens, the **Edit Meter Reading History** tab button warns: "If you edit or delete the most recent equipment reading, check the readings on the Equipment screen and the Edit Last PM screen so the PM reports stay correct."

## Related topics

- Grid viewing and editing
- Data grid overview and basics
- Security Administration: access levels by user
- Reading updates
- Cost Accounting screen tools
- Units of measure, fiscal years and organizations
- Equipment maintenance history