

AM.020.091 – ADDING AND TRACKING MAINTENANCE CONTRACTS

Purpose	<ul style="list-style-type: none"> To identify what must be in the system before entering maintenance contract information. To identify who may contract with a supplier to perform required maintenance. To add and track a maintenance contract.
Description	<p>Either Purchasing or Property Control may contract with the supplier to perform required maintenance. Therefore, the AM user may be notified of the need to record this information by Purchasing or from within their own department.</p> <p>The information in this page helps track maintenance contracts. Users can enter this information when the asset was issued, when the asset expires, what the institution paid for the asset, had to pay for the asset, and the vendor honoring the contract. Users can also identify the person who is responsible for ensuring the assets covered by this contract are maintained and repaired as required.</p> <p>This feature for Maintenance Contracts is optional and not all assets will have maintenance contracts associated with them. However, some institutions will want to add and track maintenance contracts as an additional property management feature.</p>
Security Role	BOR_AM_SERV_RPR
Dependencies/ Constraints	<p>The supplier must be in the system prior to the user entering maintenance contract information for this supplier. If this supplier does not exist in the system, Purchasing or Payables will typically enter the supplier in the system.</p>
Additional Information	None

Procedure

Below are step by step instructions on how to add and track maintenance contracts.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Asset Management link.
4.	Click the Service and Maintenance link.
5.	Click the Maintenance Contract Terms link.
6.	Click the Add a New Value tab.
7.	Enter information in the SetID field, Supplier ID field, and Contract field, then click the Add button.
8.	Enter effective date in Effective Date field.
9.	Click the Status dropdown menu and select “ Active. ”
10.	Enter any additional information about the maintenance contract.
11.	Click the Save button.