



CANADA COMMUNITY-BUILDING FUND IN BRITISH COLUMBIA

HOW TO SUBMIT YOUR ASSET MANAGEMENT ASSESSMENT FORM

TABLE OF CONTENTS

SECTION 1 - LOGGING INTO PIMS.....	4
SECTION 2 - LOCATING YOUR FORM.....	5
SECTION 3 - STARTING YOUR FORM.....	7
SECTION 4 - UPLOADING ATTACHMENTS TO YOUR FORM..	9
SECTION 5 - SUBMITTING THE FORM.....	11
SECTION 6 - PRINTING OR SAVING THE FORM AS A PDF....	13

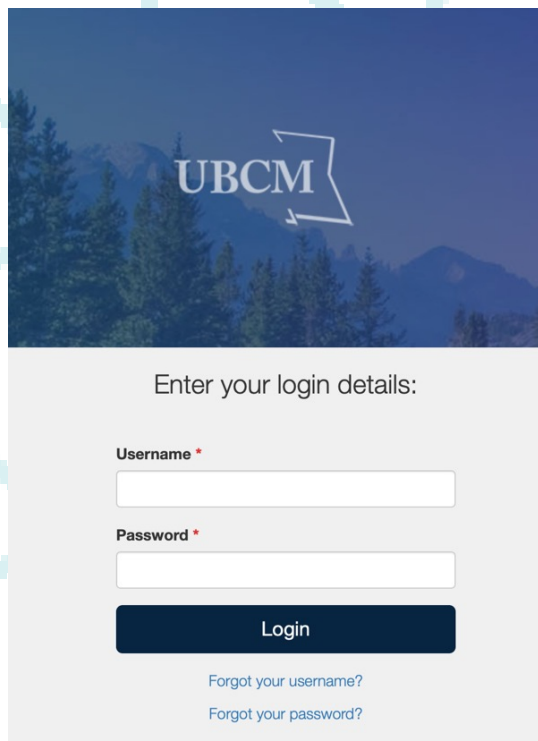


SECTION 1 - LOGGING INTO PIMS

You require a username to access to PIMS. If you do not have one, please contact PIMS@ubcm.ca

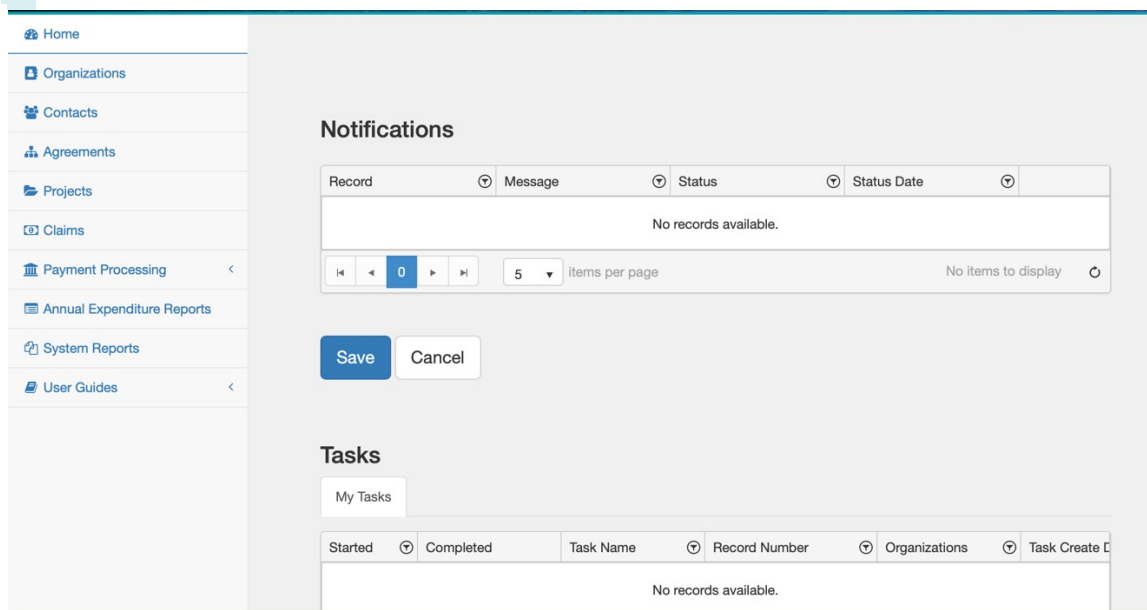
- If you have forgotten your username click on the link and follow instructions.
- If you have forgotten your password click on the link and follow instructions.
- If you have forgotten both your username and password, start by clicking the 'Forgot your username?' link

Enter your log-in details.



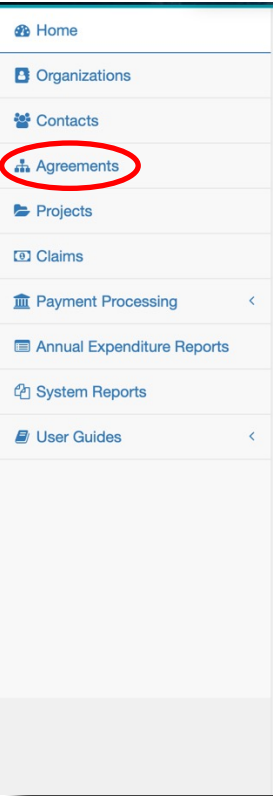
The login form features the UBCM logo at the top, set against a background image of a forest and mountains. Below the logo, the text 'Enter your login details:' is displayed. The form includes two input fields: 'Username *' and 'Password *'. A dark blue 'Login' button is positioned below the password field. At the bottom of the form, there are two links: 'Forgot your username?' and 'Forgot your password?'.

Once logged in you will land on the PIMS Home page.



The PIMS Home page features a left-hand navigation menu with the following items: Home, Organizations, Contacts, Agreements, Projects, Claims, Payment Processing, Annual Expenditure Reports, System Reports, and User Guides. The main content area is divided into two sections: 'Notifications' and 'Tasks'. The 'Notifications' section includes a table with columns for Record, Message, Status, and Status Date. The table is currently empty, displaying 'No records available.' Below the table, there are pagination controls showing '0' items per page and a 'Save' button. The 'Tasks' section includes a table with columns for Started, Completed, Task Name, Record Number, Organizations, and Task Create Date. This table is also empty, displaying 'No records available.'

SECTION 2 - LOCATING YOUR FORM



From the 'Home' page, scroll down the page until you find the 'Agreements' tab on the left hand side of your screen.

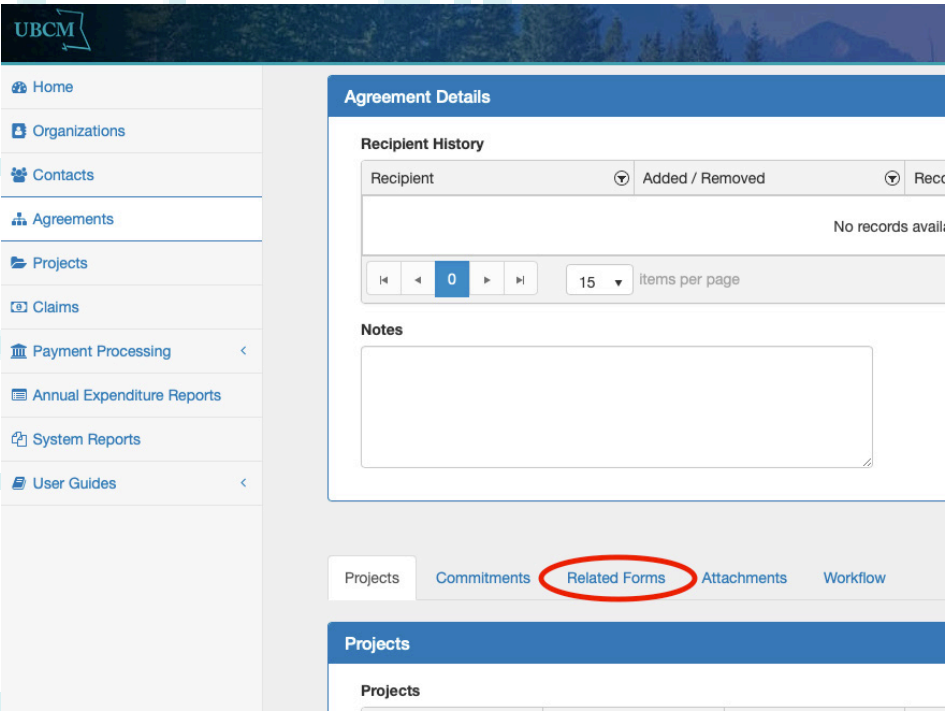
On the Agreements page locate your CCBF/CWF agreement. Click on the Agreement #.

Agreement #	Program	Recipient(s)	Execution Date	Termination Date
AG258	CCBF/IF	Victoria	Jan 21, 2009	Dec 30, 2013
AG218	CCBF/IF	Victoria	Jun 18, 2008	Mar 31, 2012
AG695	CCBF/CWF	Victoria	Aug 07, 2014	Mar 31, 2024

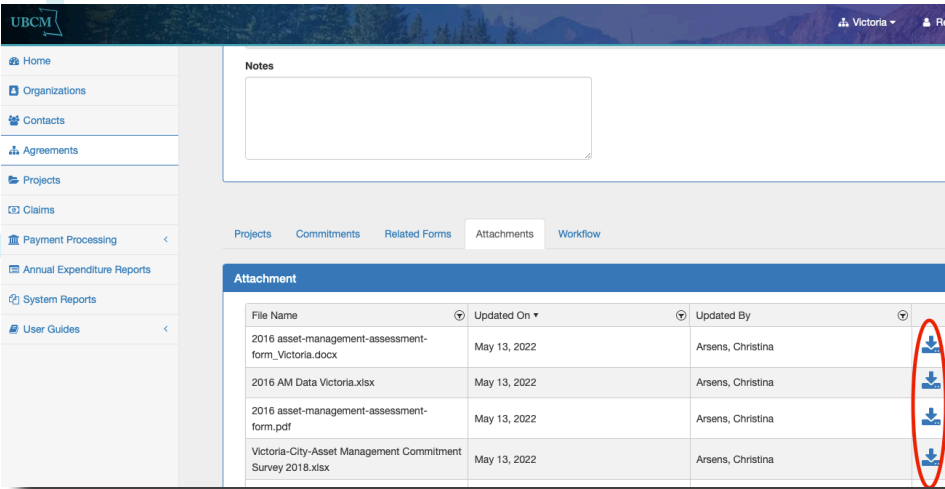
In the Agreement Summary page scroll down until you get to the Agreements grid. Click on the Agreement # located in the grid.

Agreement #	Execution Date	Termination Date	Reason(s) for Am...	Status
AG695-0	Aug 07, 2014	Mar 31, 2024	-	(Converted) Exe

In the Agreement Page, scroll down until you see the tabs listed at the bottom. Click on the 'Related Forms' tab. This is where you will begin your form.



Beside the related forms tab you will see the 'Attachments' tab. Click here to access your organizations previously submitted data.



Click on the far right icon of a hard drive and arrow to download previously submitted data.

SECTION 3 - STARTING THE FORM

Navigate to the related forms tab.

UBCM

Home Organizations Contacts Agreements Projects Claims Payment Processing Annual Expenditure Reports System Reports User Guides

Projects Commitments **Related Forms** Attachments Workflow

Start a new Form

Form Name	Req?	Available From
2022 Asset Management Assessment Form - Measuring Progress	No	Mar 01, 2022

1 15 items per page

Draft in Progress

Form Name	Req?	Initiated On
Test Form	No	Apr 14, 2022

1 15 items per page

A new window will open showing the form. Below is an example of what the form will look like.

Create 2022 Asset Management Assessment Form - Measuring Progress

Welcome to the Asset Management Assessment Form - Measuring Progress for the Canada Community-Building Fund

Deadline for submission: Friday, September 30, 2022

Previously submitted data on asset management practices can be found in PIMS. Please see the Asset Management Assessment Form How-to Guide for assistance. If you still experience challenges, please contact ccbf@ubcm.ca.

It is important that you save the data entered in this form.

For technical assistance please contact PIMS@ubcm.ca or phone 250-356-0930 during regular business hours.

ADD HOW-TO GUIDE HYPERLINK, PIMS link

Introduction Contact Information **Section 1: Core Elements & Capacity Building** Section 2: Asset Assessment Section 3: Planning for Asset Management

Section 4: Implementation of Asset Management Section 5: Formal Asset Management Planning Process

Section 6: Condition, Replacement & Renewal for Asset Categories Section 7: Roads & Bridges Section 8: Potable Water Section 9: Stormwater

Section 10: Wastewater Section 11: Sports & Recreation Section 12: Other Buildings & Facilities

CORE ELEMENTS & CAPACITY BUILDING

People, information, assets, and finances comprise the core of the AM process. As described in the Framework, these four elements are considered core resources required to support the process of AM, and thus necessary for sustainable service delivery.

6. Has your local government established a formal AM process?

☐ Yes ☐ No ☐ Other

7. AssetSMART 2.0 is a tool used by local governments to assess and improve organizational capacity. Has your local government used AssetSMART to evaluate

Continue to fill out the application at your leisure and remember to click save frequently.

Scroll to the bottom of the page and click save.

☐ Debt levels are high and a debt management strategy is being considered.

☐ Debt levels are reasonable, but debt is trending upwards.

☐ Debt levels are prudent and reasonable; Debt is a tool we use strategically and is in line with a long-term financial plan.

17. Revenue - Select the option that best describes your local governments revenue stream(s):

☐ Revenues fluctuate year to year with no linkages between reserves and a long-term financial plan.

☐ Revenues are sufficient and reliable to fund requirements for the next five years.

☐ Revenues are sufficient and reliable to fund requirements for the next 10 years.

☐ Revenues are sufficient, predictable, and stable to fund long term sustainable service delivery.

☐ Major controllable revenues are sufficient, predictable and stable to fund long term sustainable service delivery.

[Introduction](#) [Contact Information](#) [Section 1: Core Elements & Capacity Building](#) [Section 2: Asset Assessment](#) [Section 3: Planning for Asset Management](#)

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[Section 6: Condition, Replacement & Renewal for Asset Categories](#) [Section 7: Roads & Bridges](#) [Section 8: Potable Water](#) [Section 9: Stormwater](#)

[Section 10: Wastewater](#) [Section 11: Sports & Recreation](#) [Section 12: Other Buildings & Facilities](#)

[Save](#) [Cancel](#)

The document will be saved successfully when this message is shown.

✓ **Success Messages...** ✕

The 2022 Asset Management Assessment Form - Measuring Progress has been updated successfully.

Once saved, the form will no longer say 'Create' at the top of the form.

2022 Asset Management Assessment Form - Measuring Progress

Welcome to the Asset Management Assessment Form - Measuring Progress for the Canada Community-Building Fund

Deadline for submission: Friday, September 30, 2022

Previously submitted data on asset management practices can be found in PIMS. Please see the Asset Management Assessment Form How-to Guide for assistance. If you still experience challenges, please contact ccb@ubcm.ca.

It is important that you save the data entered in this form.

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ADD HOW-TO GUIDE HYPERLINK, PIMS link

[Introduction](#) [Contact Information](#) [Section 1: Core Elements & Capacity Building](#) [Section 2: Asset Assessment](#) [Section 3: Planning for Asset Management](#)

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[Section 10: Wastewater](#) [Section 11: Sports & Recreation](#) [Section 12: Other Buildings & Facilities](#)

Contact Information

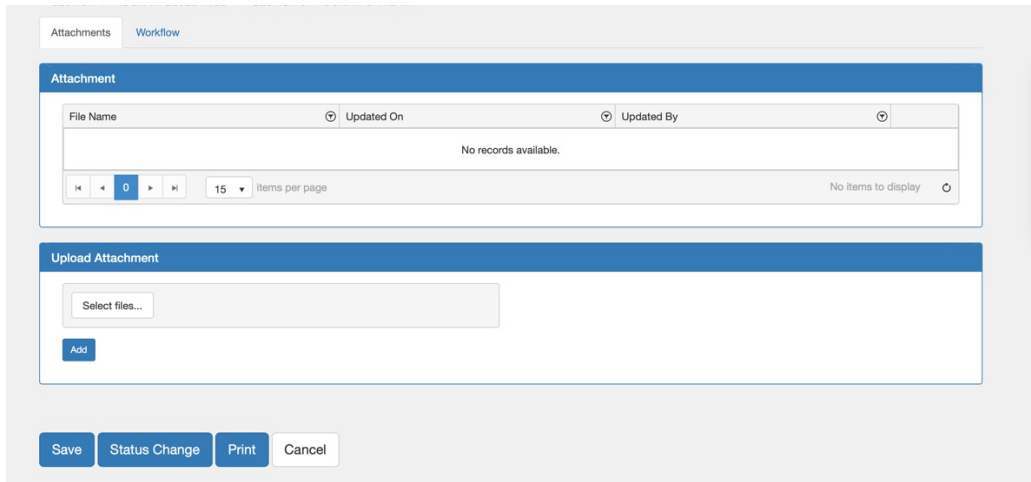
UBCM may follow-up with local governments after assessment form has been submitted. Please provide contact information for the person coordinating the completion of this form.

SECTION 4 - UPLOADING ATTACHMENTS TO YOUR FORM

When you are ready to upload required documents and other supporting materials, navigate to the bottom of the application form page.

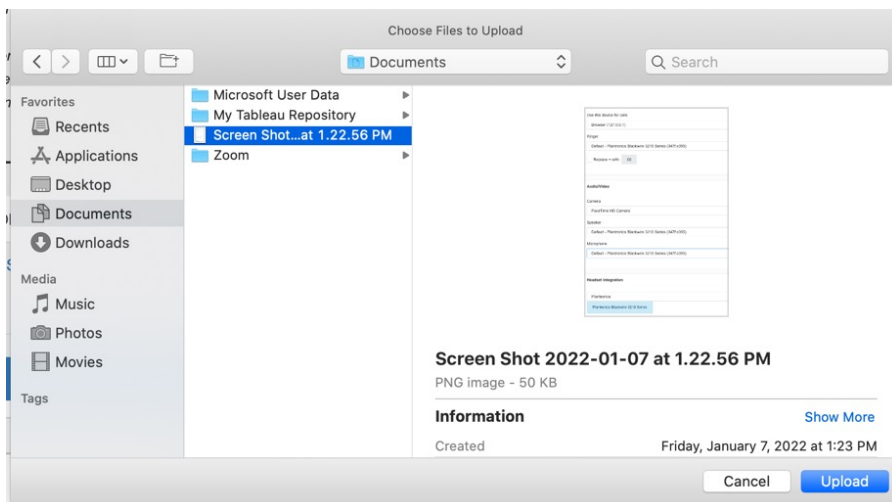
Note – This field will not appear until you have saved your file for the first time.

Click on the select files.. button under the Upload Attachment grid.



The screenshot shows a web application interface with two tabs: "Attachments" and "Workflow". The "Attachments" tab is active. Below the tabs is a section titled "Attachment" which contains a table with columns: "File Name", "Updated On", and "Updated By". The table is currently empty, displaying "No records available." Below the table is a pagination control showing "15" items per page and "No items to display". Below the "Attachment" section is a section titled "Upload Attachment" which contains a "Select files..." button and an "Add" button. At the bottom of the page are four buttons: "Save", "Status Change", "Print", and "Cancel".

From the pop-up window, chose a file to be uploaded and click the upload button. The maximum file size is 20 MB.



As shown below, once the selected file is ready for upload it will appear green and ready 100%. Now click the 'Add' Button below the upload attachment grid.

AttachmentsWorkflow

Attachment

File Name	Updated On	Updated By	
No records available.			

0

15 items per page

No items to display

Upload Attachment

Select files...Done

Screen Shot 2022-01-07 at 1.22.5...

100%

Add



A file that is successfully uploaded will appear in the 'Attachment' grid as shown below. If you have multiple files to upload this step will need to be completed again until all the files have been uploaded successfully.

If you experience any issues uploading files, please review your file to ensure it is no more than 20 MB. Only one file can be uploaded at a time.

If you have any issues that cannot be resolved following the steps above contact ccbf@ubcm.ca

AttachmentsWorkflow

Attachment

File Name	Updated On	Updated By	
Screen Shot 2022-01-07 at 1.22.56 PM.png	Mar 30, 2022	Williams, Rebecca	 

1

15 items per page

1 - 1 of 1 items

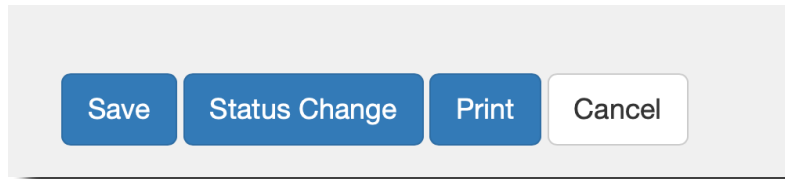
Upload Attachment

Select files...

Add

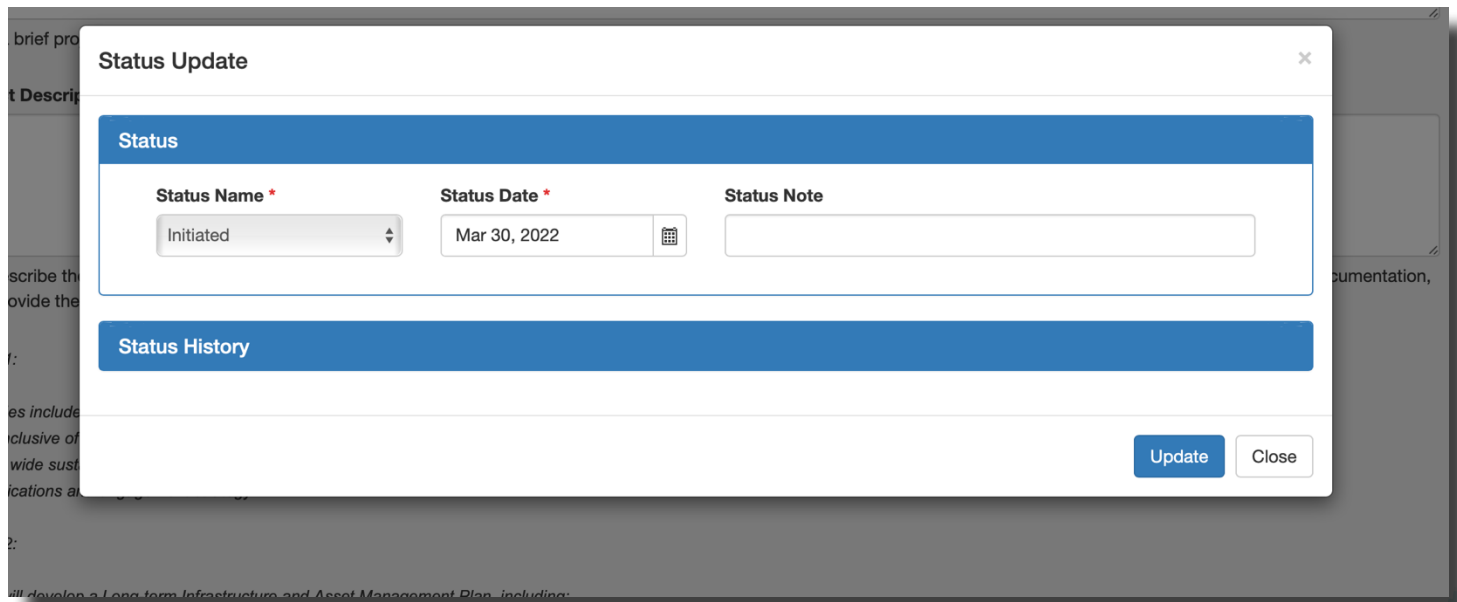
SECTION 5 - SUBMITTING THE FORM

Once the application form is complete and all of the attachments have been added you can submit your form. Click 'Save' and then click 'Status Change'.



A horizontal row of four buttons: 'Save' (blue), 'Status Change' (blue), 'Print' (blue), and 'Cancel' (white with a grey border).

Below is the pop-up window that appears when submitting an application form. Update the 'Status Name' to 'Submitted'. Click the 'Update' button in the lower right of the window.



A pop-up window titled 'Status Update' with a close button (X) in the top right corner. The window contains two main sections: 'Status' and 'Status History'. The 'Status' section has three fields: 'Status Name' (a dropdown menu currently showing 'Initiated'), 'Status Date' (a date field showing 'Mar 30, 2022' with a calendar icon), and 'Status Note' (a text input field). The 'Status History' section is currently empty. At the bottom right of the window are two buttons: 'Update' (blue) and 'Close' (white with a grey border).

After the 'Update' button is clicked a green banner will appear that reads "The Form instance has been updated successfully".

Status Update

The Form Instance status has been updated successfully.

Status

Status Name *

Submitted

Status Date *

Mar 30, 2022

Status Note

Status History

Update

Close

PROJECT INFORMATIONSECTION 2 PROJECT COSTS AND SOURCES OF FUNDINGSECTION 3 PROJECT OUTCOMES AND OUTPUTS

All information will be available in PIMS for you to read. Editing functions are not available after the application form has been submitted.

Only submitted application forms and project records will be considered for funding. If you require assistance please contact ccbf@ubcm.ca

SECTION 8 - PRINTING OR SAVING THE FORM AS A PDF

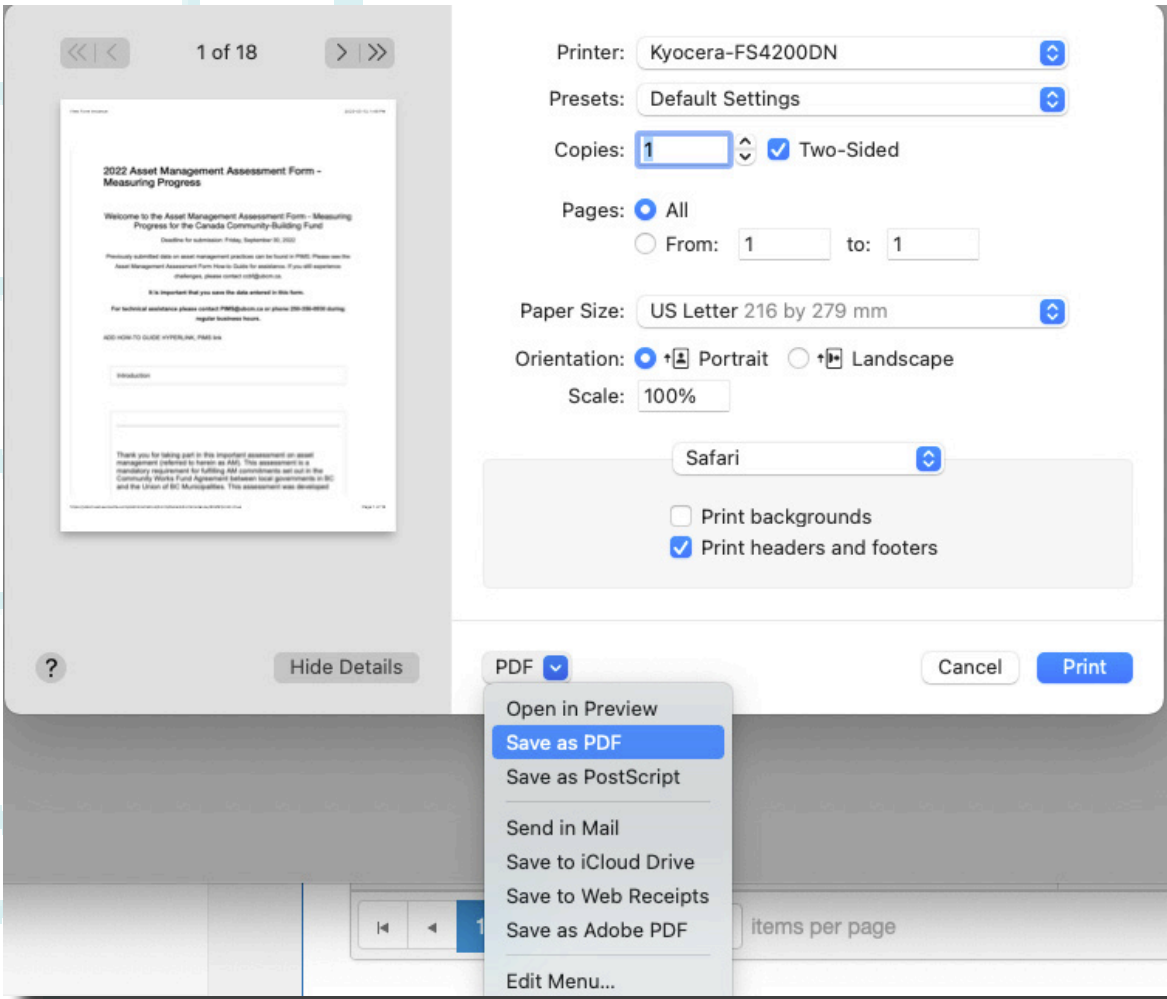
The form can now be printed or saved as a PDF. To do this, click print. A pop-up window will appear.

The screenshot shows the top navigation bar of the form with tabs for Introduction, Contact Information, Section 1: Core Elements & Capacity Building, and Section 2: Formal Asset Management Planning. Below this, there are tabs for Attachments and Workflow. The Attachments tab is active, showing a table with columns for File Name and Updated On. The table is empty, with the text "No records available." below it. At the bottom of the attachment section, there are buttons for Edit, Print, and Cancel.

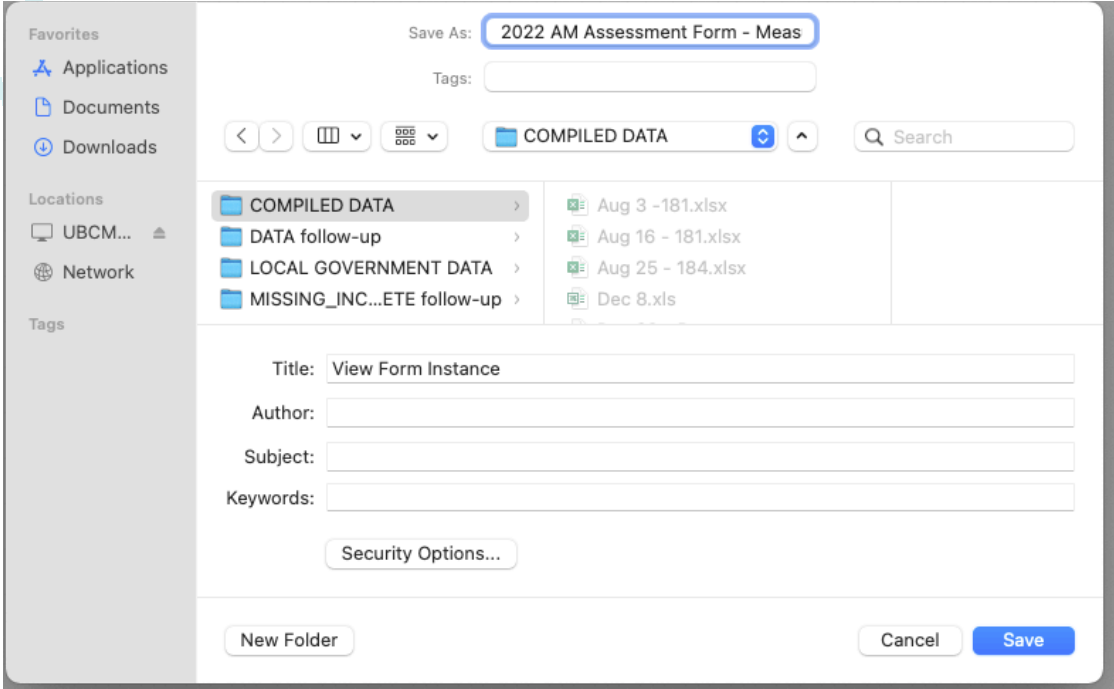
To print on paper, click the print button in the lower right corner of the pop-up window.

The screenshot shows a print dialog box. On the left, there is a preview of the form titled "2022 Asset Management Assessment Form - Measuring Progress". The dialog box contains the following settings: Printer: Kyocera-FS4200DN, Presets: Default Settings, Copies: 1, Two-Sided checked, Pages: All, Paper Size: US Letter 216 by 279 mm, Orientation: Portrait, Scale: 100%, and a dropdown menu set to Safari. At the bottom, there are checkboxes for "Print backgrounds" (unchecked) and "Print headers and footers" (checked). The dialog box has a "Cancel" button and a "Print" button.

To print to PDF click the drop down menu on the lower left of the window. Select 'Save to PDF'.



Rename the file, select 'Where' to save the file and click the save button.



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