Annual Equipment Insurance System
Instructions for Template Upload & Add an Item

Welcome!
Insurance Policy Effective
11/1/2014 – 10/31/2015
AEIS System: **Important!!!**

Equipment that will be used in a waterborne or airborne capacity should NOT be entered to AEIS. Instead, submit spreadsheet to

oa.riskmgt@austin.utexas.edu.

For more information and request forms, see Handbook of Business Procedures; Part 19. RISK MANAGEMENT; Section 19.1.3 Equipment Insurance and Related Claims

AEIS System: After the Renewal Period

AEIS will be open to users throughout the year to add items during Insure Year 2014 - 2015
The AEIS System

♦ The system formerly known as EIAR (Equipment Insurance Annual Renewal) system is now called the AEIS (Annual Equipment Insurance System).

♦ The system is used for items you wish to insure on the University’s annual insurance program (but NOT items requiring temporary or airborne or waterborne equipment insurance coverage).

♦ Insurance coverage for Insure Year 2014 will be in effect 11/1/2014 – 10/31/2015.
Authorization to Use AEIS

- Authorization to use or view the AEIS system requires *DEFINE authorization for the NVE command.

- If you are unable to login to AEIS, contact your *DEFINE electronic office manager and ask to be added to a desk with NVE access.

- For assistance, phone Accounting Help Desk 471-8802.
What you need to get started:

- **Unit Code**
- **Account number(s)** to charge for insurance cost. You must enter a valid account number (active account within your unit code) to be charged for the insurance premiums
- **Valid UT-assigned inventory numbers** for items you wish to insure. If no inventory number is assigned, provide either a serial number or department assigned tracking number *in the serial number field* to uniquely identify each item
What you need to get started - continued:

- **Replacement value for items.** This is very important! Replacement values can change from year to year, and may increase or decrease.

- If you overvalue an item you will not recover the excess value should a claim occur. You will pay more premium than you ought to.

- If you undervalue an item you will recover only the amount you listed as the item’s replacement cost.

Presented by Lisa Shanks
AEIS Audits – Unique Identifiers

- Each item added to the system must have a unique identifier. Use the UT assigned *Inventory Number* if available. If items are bundled and have the same inventory number, you must differentiate them by giving a *different description*.
- If no UT assigned *Inventory Number* is available, you may enter the serial number.
- We prefer you provide both, if available.
AEIS Audits – Valid Account!

- If the account you enter is not valid within your unit code, the system will not accept it.

- If the account you enter will expire before 12/31/2014, the system will not accept it.
The AEIS Home Page

https://utdirect.utexas.edu/acct/insure/aeis/insure.WBX

Presented by Lisa Shanks
To View Items in AEIS:

- Type either the four- or seven-digit unit code in the Display Items for Unit Code field and click the Display Items button.

**Annual Equipment Insurance System**

- The four-digit code displays items for all sub-units of the specified unit code.
  - Example: Entering 0820 displays 0820-000 through 0820-xxx.
- The seven-digit code displays items for only one unit code.
  - Example: Entering 0820-001 will display only 0820-001.
With Insure Year 2013/2014 selected, enter your unit code to view your currently insured items.

The Equipment Insurance System is open. There are 4 items to insure in unit 5012000.

Items can be insured for either the current or next insure year. You are viewing items for insure period 11/01/2010 to 10/31/2011.
AEIS: Add Items – 2 ways!

- The “Upload Template”

  or

- Add individual items
AEIS Equipment Adds/Deletes

- Users may access AEIS Upload Template to add items throughout the year.
- Users may also manage individual items in AEIS with functions available on the “Update/Add/Delete” tab.
Users may access AEIS Upload Template to add items throughout the year.

- AEIS provides an easy to use spreadsheet Upload Template.
- Fill out Excel template with your items.
- **IMPORTANT:** Use Delete function under the HOME tab to delete all “blank” rows below the last row containing data.
- Save in Tab Delimited text file.
- Upload the spreadsheet.

Presented by Lisa Shanks
Instructions

For "Rollover"

For New Items

To upload a spreadsheet of new items to be insured, you must:

1. Download the spreadsheet template.
2. Fill out the template with your items. (You may find the Tips & Resources below helpful.)
3. Save the spreadsheet as a Tab Delimited text file.
4. Upload the spreadsheet. (This will open a new window/tab.)

You will receive an email either confirming a successful upload, or notifying you of any problems. If there are any errors or problems, a link will be provided to download your spreadsheet with the errors noted. You will need to correct any entries with errors and upload the spreadsheet again. Your entries will not be saved until the entire upload is free of errors.
AEIS Add New Items – The Upload Template-Continued

The upload template –
sample

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
</tr>
</thead>
<tbody>
<tr>
<td>Insure Year (YYYY)</td>
<td>Department Contact EID</td>
<td>Acct Unit Code (7)</td>
<td>Account Number (10)</td>
<td>Equipment Type Code</td>
<td>Item Description (100 max)</td>
<td>Inventory Number</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

HINT: Obey field maximum length indicators!!

Presented by Lisa Shanks
When working with your data on the spreadsheet:

- For “Equipment Type” please select an accurate code that best describes your item.
- Select from the “Equipment Type” list in the Tips and Resources section of the AEIS Instructions page.
- We prefer you not select “AOTH” (Other). However, this is available if none of the Equipment Type Codes is appropriate.

_HINT:_ Only an exact match to codes listed in the system instructions will successfully upload.
When working with your data on the spreadsheet:

- For Reason Insured, please select an accurate code that best describes why you are insuring your item.

- Select from the “Reason Insured” list in the Tips and Resources section of the AEIS Instructions page.

- We prefer you not select “ROTH” (Other). However, this is available if none of the Reason Insured Codes will suffice.

  *If “ROTH” is selected, you must type a valid description in the Other Reason Explanation field on the spreadsheet (under 100 characters).*

HINT: Only an exact match to codes listed in the system instructions will successfully upload.
Processes Upload
Confirm Success!

♦ Select the appropriate insure year (2014/2015)
♦ Click the Update/Add/Delete tab.
♦ Enter your unit code
♦ If the upload was successful, a list of your items should be displayed

HINT! You will receive an email either confirming a successful upload, or notifying you of any problems.

♦ If there are any errors or problems, a link will be provided to download your spreadsheet with the errors noted. You will need to correct any entries with errors and upload the spreadsheet again. Your entries will not be saved until the entire upload is free of errors.
AEIS SRS Secure Report Link

SRS - Secure Report System  (QUAL Version)

Search batch processes (example: AQJGABCD) [Submit]

Please click on the report link to get a list of currently available downloads.

- AQ3GEOQN - EQUIPMENT INSURANCE RECORDS DOWNLOAD
- AQ3GITRIV - INTERNATIONAL TRAVEL REPORT FOR UT SYSTEM
- INIL TRAVEL RPT
- BMJG102 - UT DRIVER SUMMARY REPORT FROM DPS
- UT DRIVER SUMMARY
- INJGEQDN - UPDATED INSURED EQUIPMENT FOR NEXT YEAR
- NEXT YEAR BY UNIT
- INJGEQD1 - CURRENT YEAR INSURED EQUIPMENT
- CURRENT BY UNIT

Return to start of listing

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AEIS SRS Secure Report

From here, download report to Excel

SRS - Secure Report System

Report Title: EQUIPMENT INSURANCE RECORDS DOWNLOAD
Batch Process (Jobgroup Name): AQ1GEQDN
NOTE: The download is limited to 63,000 records.

Report Listing:

<table>
<thead>
<tr>
<th>Input</th>
<th>Submitted by</th>
<th>Creation Date</th>
<th>Time</th>
<th>Environment</th>
<th>Download to</th>
</tr>
</thead>
<tbody>
<tr>
<td>AEIS records for comp 0 year 2009 unit 5012</td>
<td>jh249</td>
<td>08/21/2009</td>
<td>07:08:29PM</td>
<td>QUAL</td>
<td>Excel</td>
</tr>
<tr>
<td>AEIS records for comp 0 year 2009 ALL units</td>
<td>jh249</td>
<td>08/21/2009</td>
<td>11:33:30AM</td>
<td>QUAL</td>
<td>Excel</td>
</tr>
<tr>
<td>AEIS records for comp 0 year 2009 ALL units</td>
<td>jh249</td>
<td>08/19/2009</td>
<td>11:32:52PM</td>
<td>PROD</td>
<td>Excel</td>
</tr>
<tr>
<td>AEIS records for comp 0 year 2009 ALL units</td>
<td>jh249</td>
<td>08/19/2009</td>
<td>11:25:29PM</td>
<td>PROD</td>
<td>Excel</td>
</tr>
<tr>
<td>AEIS records for comp 0 year 2008 ALL units</td>
<td>jh249</td>
<td>08/19/2009</td>
<td>06:11:11PM</td>
<td>PROD</td>
<td>Excel</td>
</tr>
<tr>
<td>AEIS records for comp 0 year 2008 unit 5012</td>
<td>jh249</td>
<td>08/19/2009</td>
<td>05:13:03PM</td>
<td>QUAL</td>
<td>Excel</td>
</tr>
</tbody>
</table>

Comments to: SRS Support

Presented by Lisa Shanks
Equipment Adds/Deletes Post-Renewal

♦ You may access the AEIS system to add items to the annual insurance policy for effective dates of coverage on or after Nov. 1, 2014.

♦ Coverage for items added through AEIS will be effective on the first day of the month entered, through policy end date (October 31, 2015).

NOTE: The system will track the actual date the item was entered, and if a loss occurs we must validate date of loss is after the date the item was entered to AEIS.
AEIS Add an Individual Item

Update/Add/Delete Tab
Click on Add New Items
After all updates have been made, click the Add New Item button.
If no errors are found, **Insurance information successfully updated** will appear at the top of the screen.

The EIAR system is open for adding and deleting of items for insure year 2008.

**Successfully added equipment insurance item.**

<table>
<thead>
<tr>
<th>Unit Code</th>
<th>5012000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Description</td>
<td>Apple PowerMac G5</td>
</tr>
<tr>
<td>UT-assigned Inventory Nbr</td>
<td>786095</td>
</tr>
<tr>
<td>Serial or Dept Tracking Nbr</td>
<td>NEW ITEM</td>
</tr>
<tr>
<td>Insured Amount</td>
<td>4,000</td>
</tr>
<tr>
<td>Estimated Cost to Insure</td>
<td>$ 5.70</td>
</tr>
<tr>
<td>Account to Charge</td>
<td>1406010050</td>
</tr>
<tr>
<td>Insured From Date</td>
<td>Month Aug Year 2009</td>
</tr>
<tr>
<td>Insured To Date</td>
<td>Month Oct Year 2009</td>
</tr>
<tr>
<td>Total Months Insured</td>
<td>3</td>
</tr>
<tr>
<td>Make or Model</td>
<td>G5</td>
</tr>
<tr>
<td>Equipment Type</td>
<td>Computer (Not Laptop)</td>
</tr>
<tr>
<td>Reason Insured</td>
<td>Housed with other insured equipment</td>
</tr>
<tr>
<td>UT Owned?</td>
<td>Yes</td>
</tr>
<tr>
<td>Department Contact</td>
<td>Mohammad A Khan</td>
</tr>
<tr>
<td>Date Reviewed</td>
<td>08/20/2009</td>
</tr>
</tbody>
</table>

Click the Close Window button to return to the items listing.
Annual Equipment Insurance System

The E1AR system is open for adding and deleting of items for insure year 2008.

There are 3 items to insure in unit 5012000.

<table>
<thead>
<tr>
<th>Unit Code</th>
<th>Display all Items for Unit Code</th>
<th>Display Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>5012000</td>
<td>5012</td>
<td></td>
</tr>
</tbody>
</table>

Delete Selected Items  Add New Items

<table>
<thead>
<tr>
<th>Item</th>
<th>Unit Code</th>
<th>Item Description</th>
<th>UT-assigned Inventory Nbr</th>
<th>Serial Nbr</th>
<th>Insured Amount</th>
<th>Cost to Insure</th>
<th>Months Insured</th>
<th>Account to Charge</th>
<th>Last Reviewed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apple Mac Book Pro</td>
<td>5012000</td>
<td>788294</td>
<td>W863105WTH</td>
<td>$2,000</td>
<td>$14.82</td>
<td>12</td>
<td>14-0601-0050</td>
<td>04/16/2009</td>
<td></td>
</tr>
<tr>
<td>Test item</td>
<td>5012000</td>
<td>1234</td>
<td>NEW ITEM</td>
<td>$2,500</td>
<td>$3.56</td>
<td>3</td>
<td>14-0601-0050</td>
<td>08/19/2009</td>
<td></td>
</tr>
<tr>
<td>Apple PowerMac G5</td>
<td>5012000</td>
<td>788695</td>
<td>NEW ITEM</td>
<td>$4,000</td>
<td>$5.70</td>
<td>3</td>
<td>14-0601-0050</td>
<td>3/20/2009</td>
<td></td>
</tr>
</tbody>
</table>
Items should only be deleted if you entered them by mistake.

You should never delete items other than those you added during the current month, as this will corrupt your Insured Items file.

Once an item is deleted, it may not be re-added. The system rejects this as a duplicate entry.

Deleting items other than those you entered during the current month does not remove them from the insurance nor assure a return of premium. For this, you must contact Risk Management.
First, select the **Remove This Item** box for item(s) you wish to delete.

**Annual Equipment Insurance System**

The EIAR system is open for adding and deleting of items for insure year 2008.

There are 3 items to insure in unit 5012000.

<table>
<thead>
<tr>
<th>Unit Code</th>
<th>Display all items for Unit Code</th>
<th>Display Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>5012000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Then, click the **Delete Selected Items** button.

**USE THE DELETE FUNCTION ONLY FOR DATA ENTRY ERRORS! TO REMOVE AN ITEM FROM THE INSURANCE DURING THE CURRENT YEAR YOU MUST CONTACT RISK MGT!**

Presented by Lisa Shanks
AEIS Remove items

- Make sure you’re in the correct INSURE YEAR (reference the dropdown in the upper right corner of the AEIS screens)

- Use the Upload process, or delete individual items in 2014-2015 by using Update/Add/Delete screens
Temporary Equipment Insurance will continue to follow the procedure of submitting spreadsheets to University of Texas at Austin Risk Management for approval. These items will NOT be stored or managed on the AEIS system.
Waterborne/Airborne Items Insurance

- Remember, do NOT enter items that will be used in the water ("waterborne use") or air ("airborne use") to the AEIS system.

- Instead, submit spreadsheet to oa.riskmgt@austin.utexas.edu.

- Items entered only in AEIS will NOT be covered for waterborne or airborne use, even if premium is paid.
Need More Information?

- See Handbook of Business Procedures; Part 19. RISK MANAGEMENT; Section 19.1.3 Equipment Insurance and Related Claims

- Read the AEIS Information link in AEIS
  [https://utdirect.utexas.edu/acct/insure/aeis/insure.WBX](https://utdirect.utexas.edu/acct/insure/aeis/insure.WBX)

- For questions about equipment insurance contact: Lisa Shanks, Risk Manager.
  [lshanks@austin.utexas.edu](mailto:lshanks@austin.utexas.edu) (512) 232-5153
Equipment Insurance Listserv

- You may subscribe to our equipment insurance department contacts listserv at: https://utlists.utexas.edu/sympa/

- Subscribe to aeis-dept-contact@utlists.utexas.edu