

## AssetOptics Quick Start Asset Management Training Exercises

Prior to completing these training exercises, please ensure that you have a user account in an AssetOptics training environment or sandbox. If you do not have a user account, please submit a case via the Support Community at [www.assetoptics.com](http://www.assetoptics.com)

For these exercises you will be acting as a maintenance supervisor in a fictional brewery. Partial data have been preloaded into a demo org for this purpose. You will be instructed to both review existing records and create new ones to familiarize yourself with the concepts being presented. Save your work as you go.

In this exercise you will learn about the following: Equipment/Asset records, Asset hierarchies, Asset Groups, Location Hierarchies; Buildings, Floors, and Spaces; Meters and Meter Readings.

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**Definition:** “Equipment/Asset” – a physical entity upon which preventive and corrective maintenance is performed and work orders tracked.

**Action:** Select the **Equipment/Assets** tab. Choose **All Equipment** from the drop-down menu to see a list view of all the brewery’s assets. You may optionally “pin” this view by clicking on the push pin icon next to the drop-down menu.

Choose **Mash Mixer Pump** from the list of assets by clicking on its Asset ID (name). On the **Details** page, review each section and field to see how assets may be described and categorized. Hover over the information icon ⓘ next to any field for more details.

**Exercise:**

1. Create a new Equipment/Asset record (record type: Equipment) with the following details.

**Asset ID:** Can Filler

**Description:** Automatic Can Filling Machine

**Status:** In Service

2. From the **Quick Links** pane on the Can Filler record page, hover over **Child Equipment/Assets** link and click “new.” Create a new Equipment/Asset record (record type: Component) with the following details.

**Asset ID:** Turret

**Description:** Can Filling Turret

**Status:** In Service

Scroll down to the **Asset Hierarchy** Section and note that **Parent Asset ID** is prepopulated with **Can Filler**.

3. Select the **Equipment/Assets** tab to navigate back to the assets list view.
4. Create a new Equipment/Asset record (record type: Component) with the following details by clicking the “new” action button in the header.

**Asset ID:** Can Seamer

**Description:** Can Seamer

**Status:** In Service

**Parent Asset ID:** Can Filler

**Hierarchy Sort Order:** 2

5. Return to the **Can Filler** record page and observe the **Asset Hierarchy** pane on the page layout. Click the caret to expand the hierarchy. You should see something like this.

<b>Asset Hierarchy</b>		Map	
Asset Name	▼	Description	▼
▼ Can Filler		Automatic Can Filling Machine	
> Turret		Can Filling Turret	
> Can Seamer		Can Seamer	

**Definition:** “Location” – a user-defined area (logical or physical) containing Equipment/Assets.

**Action:** Select the **Locations** tab. Choose and pin **All Locations** from the drop-down menu to see a list of the brewery’s locations. Select “Brewing Facility” and under Location Hierarchy click the caret (if necessary) to expand the hierarchy. Click and expand each child location.

As you navigate the hierarchy, take note in the Quick Links pane of any Equipment/Assets associated with the locations, as well as any Work Orders related to these assets.

**Exercise:**

1. Create a new Location with the following details.

**Location ID:** Retail Area

**Description:** Public Direct Sales

**Parent Location:** Brewing Facility

2. From the **Quick Links** pane on the Retail Area Location record page, use the **Child Locations** link to create two additional Locations as follows (Parent Location should be prepopulated).

**Location ID:** Cashier Station

**Hierarchy Sort Order:** 10

**Location ID:** Tasting Area

**Hierarchy Sort Order:** 20

3. Return to the Retail Area Location record page. Under Location Hierarchy you should see something like this.

Name	Description
▼ Brewing Facility	Brewing Facility
▼ Retail Area	Public Direct Sales
> Cashier Station	Cashier Station
> Tasting Area	Tasting Area
> Receiving Dock	Receiving Dock
> Dry Storage	Dry Storage
> Raw Material Storage	Raw Material Storage

**Definition:** “Building” – an object record describing a physical building, which normally includes “Floors” and “Spaces.” Preventive maintenance (i.e., PM Schedules) may be performed on Spaces independently of Equipment/Assets.

**Action:** Select the **Buildings** tab. Select “Admin” and under Building Hierarchy click the caret (if necessary) to expand the hierarchy. Click and expand each Floor to view Spaces.

*Note that when a Space is selected the Quick Links pane is updated to display links to Work Orders, PM Schedules, PM Group Schedules, and Route Stops, all of which may apply to a Space.*

**Exercise:**

1. Create a new Building with the following details.

**Building ID:** HQ

**Description:** Headquarters

2. Create three (3) Floors in HQ with the following details.

**Floor ID:** Main Floor

**Description:** Floor 1

**Hierarchy Sort Order:** 10

**Floor ID:** Floor 2

**Description:** Floor 2

**Hierarchy Sort Order:** 20

**Floor ID:** Floor 3

**Description:** Floor 3

**Hierarchy Sort Order:** 30

3. Create two (2) Spaces under Main Floor with the following details.

**Space ID:** Room 101

**Description:** Mailroom

**Hierarchy Sort Order:** 1

**Space ID:** Room 102

**Description:** Employee Break Room

**Hierarchy Sort Order:** 2

4. Return to the HQ Building record page. Under Building Hierarchy you should see something like this.

Name	Description
▼ HQ	Headquarters
▼ Main Floor	Floor 1
> Room 101	Mailroom
> Room 102	Employee Break Room
> Floor 2	Floor 2
> Floor 3	Floor 3

5. Select Room 102 (Employee Break Room) from the hierarchy and use the Work Orders link in the Quick Links pane to create a new **Work Order** (record type: Corrective) with the following details.

**Description:** Replace electric outlet near sink

**Problem Description/Scope of Work:** Replace standard outlet next to sink with GFCI outlet per updated city building code.

*Note that in the above example the Work Order applies to the space itself (since the sink is not stored as Equipment/Asset). If the Work Order applied to an Equipment/Asset with a Space attribute (say a refrigerator in the break room), it would also appear under the corresponding Space, such as follows.*

Spaces > Room 102  
**Work Orders**  
 2 items • Sorted by Work Order • Updated 5 minutes ago

	<input type="checkbox"/> Work Order ↓	Description	Status	Due Date	Act...	Asset ID
1	<input type="checkbox"/> WO-000022	Repair Ice Maker	Approved	10/15/2020		Refrigerator
2	<input type="checkbox"/> WO-000020	Replace electric outlet near sink	Approved			

**Definition:** “Asset Groups” - A collection of Equipment/Assets of the same type. An Asset Group is used to organize Bills of Materials, Model Work Orders, and Work Order Standard Tasks to promote efficiency of work planning and minimize duplication of effort.

- “Bill of Materials” (BOM) – a list of Service/Repair parts for an Equipment/Asset.
- “Model Work Order” – a predefined job template with instructions (Work Order Tasks) and materials (Planned Stock), which can be used to automatically generate Work Orders according to a user-defined Preventive Maintenance Schedule.
- “Standard Work Task” – a predefined Work Order Task, which can be used to build corrective or preventive Work Orders.

**Action:** Select the **Asset Groups** tab. Choose APV Lobe Pump from the list. Switch from the Details view to the Related view and explore the Equipment/Assets, BOMs, Model Work Orders, and Standard Work Tasks associated with this Asset Group.

*These topics will be covered in greater depth in the learning exercise, “Work Management.”*

**Definition:** “Meter” – an instrument for measuring runtime (e.g., hours, cycles, miles) or fuel consumption (e.g., gallons). “Meter Readings” are date/time stamped recordings of meters and can be used to schedule preventive maintenance on an Equipment/Asset.

**Action:** Select the **Meters** tab. Choose the Odometer meter associated with the Brewery’s delivery truck. Click on the linked PM Schedule and observe that the delivery truck’s oil change interval is specified by its usage (i.e., miles driven) and not time (i.e., calendar-based).

*These topics will be covered in greater depth in the learning exercise, "Preventive Maintenance Scheduling."*