

AssetOptics

Quick Start Learning Series

Asset Management

Learning Objectives

Learn how to set up and use:

1. Equipment/Assets
2. Locations
3. Building, Floors, Spaces
4. Meters & Meter Readings
5. Asset Groups
6. Bills of Materials

Definitions – Asset Management

Equipment/Asset – Equipment, Components, and Vehicles. A physical or logical entity upon which preventive and corrective maintenance work orders are tracked (a.k.a., an “asset tag”)

Location – Physical and/or logical areas where Equipment/Assets are located. Locations can be organized into hierarchies

Buildings, Floors, Spaces – A three-tiered hierarchical facility data model. Equipment/Assets and Work Orders have a lookup relationship to Spaces.

Definitions – Asset Management

Meter – An instrument for measuring runtime (e.g., hours, cycles, miles) or fuel consumption (e.g., gallons)

Meter Readings – Individual date/time stamped readings for a specific meter. Can be used to schedule preventive maintenance work orders.

Asset Group – 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.

Bills of Materials – (BOM) List of Service/Repair Parts for an Equipment/Asset.

Equipment/Assets

Equipment, Components, Vehicles

The screenshot displays the 'Mash Mixer Pump' asset record in the AssetOptics system. The interface is organized into several sections:

- Header:** Shows the asset name 'Mash Mixer Pump' and navigation options like '+ Follow', 'Edit', 'Delete', 'New Note', 'New Task', 'New Event', and 'New Work Order'.
- Metadata:** A row of key information including Description (Mash Mixer Pump), Model Number (M245), Serial Number (AIM45699201), Manufacturer (Acme Industrial Machines, Inc.), Asset Location (Processing), and Parent Asset ID (Mash Mixer).
- Details:** A tabbed view showing 'Information' and 'Nameplate Information'.
 - Information:** Fields include Asset ID, Description, Asset Location, Account, Space, Owner (Admin User), Status (In Service), Type (Machinery), and Asset Group (APV Lobe Pump).
 - Nameplate Information:** Fields include Manufacturer (Acme Industrial Machines, Inc.), PO Number, Model Number (M245), Purchase Date (5/1/2016), Serial Number (AIM45699201), Mtg Date, In Service Date (5/4/2016), Noun, Modifier, and Warranty Expiration Date (5/1/2018).
- Nameplate Data:** A text field containing 'M245 MMP Voltage 230/460 Phase 3 20 HP RPM 4200'.
- Serialized Inventory Details:** Fields for Item Master, Bin Location, Purchase Order, and PO Stock Item.
- Service Planning:** Fields for Default Planner and Service Region.
- Asset Hierarchy:** Fields for Parent Asset ID (Mash Mixer), Parent Description (Mash Mixer), and Hierarchy Sort Order (0).

On the right side of the interface, there are additional panels:

- Quick Links:** A section for 'Related List Quick Links' with buttons for Work Orders (6), Route Stops (0), PM Schedules (3), Meters (1), PM Group Schedules (1), and Equipment/Assets (Parent Asset ID) (0). A 'Show All (11)' link is also present.
- Notes:** A section for 'Notes (0)' with a 'Notes (0)' button.
- QR Code:** A QR code for the asset.
- Asset Attributes:** A section for 'Asset Attributes' with a note: 'There are no Asset Attribute - Value records'.
- Asset Hierarchy Map:** A table showing the asset's location within a system hierarchy.

Asset Name	Description	Location
▼ Mash Line	Mash Line	Processing
> Mash Hopper	Mash Hopper	Processing
> Mash Conveyor	Mash Conveyor	Processing
> Roller Mill	Roller Mill	Processing

Record Asset Nameplate Information, Purchase & Service Data, Define where an Asset resides within a system (hierarchy), record images.

Locations

Location
Receiving Bay 2

+ Follow Edit Delete Clone

Description Receiving Bay 2 Parent Location [Receiving Dock](#) Parent Description Receiving Dock

Details Related

Location ID **1** Receiving Bay 2 Owner [Avatar]

Description **1** Receiving Bay 2

Created By [Avatar] 5/14/2020, 8:43 AM Last Modified By [Avatar] 5/14/2020, 8:43 AM

Location Hierarchy

Parent Location **2** [Receiving Dock](#) Hierarchy Sort Order **3** 20

Parent Description **1** Receiving Dock

Name	Description
▼ Brewing Facility	Brewing Facility
▼ Receiving Dock	Receiving Dock
> Receiving Bay 1	Receiving Bay 1
> Receiving Bay 2	Receiving Bay 2
> Dry Storage	Dry Storage
> Raw Material Storage	Raw Material Storage
> Processing	Processing
> Fermentation	Fermentation

Quick Links Chatter

Related List Quick Links **1**

- [Child Locations \(0\)](#)
- [Equipment/Assets \(4\)](#)
- [Work Orders \(0\)](#)
- [Notes \(0\)](#)
- [Files \(0\)](#)

Equipment/Assets (3+)

[Dock Leveler, Receiving Door 2](#)
Description: Dock Leveler, Receiving Door 2
Asset Group:
Serial Number: 998530

[Dock Lock, Receiving Door 2](#)
Description: Dock Lock, Receiving Door 2
Asset Group:
Serial Number: 533888

[Door System, Receiving Door 2](#)
Description: Door System, Receiving Door 2
Asset Group:
Serial Number: 533244

[View All](#)

Notes Files Location Hierarchy

- 1 – Locations are used to specify areas where Equipment/Assets are located
- 2 – Locations can be organized into hierarchies by specifying a Parent Location
- 3 – The Hierarchy Order is determined by a user-specified numerical value

Facilities Hierarchy

Buildings, Floors, & Spaces

The screenshot displays a software interface for managing facilities. At the top, a header bar shows the space name 'RM-101' and a 'Space' icon. Below this, a navigation bar includes buttons for '+ Follow', 'Edit', 'Delete', and 'Clone'. The main content area is divided into several sections:

- Details:** A table showing key information for the space:

Description	Room #101	Space Type	Room	Floor ID	FL-01	Building	101 Main St
Space ID	RM-101	Building	101 Main St	Floor ID	FL-01	Hierarchy Sort Order	101
Description	Room #101	Created By	[User Icon]	11/10/2018 10:55 AM	Last Modified By	[User Icon]	7/1/2019 2:54 PM
- Building Hierarchy:** A tree view showing the structure of the building:
 - 101 Main St
 - FL-01
 - RM-101 (selected)
 - RM-102
 - RM-103
 - RM-104
 - RM-105
 - FL-02
 - FL-03
- Quick Links:** A section with 'Related List Quick Links' including:
 - Equipment/Assets (2)
 - PM Schedules (1) (2)
 - Route Stops (0)
 - Files (0)
 - Work Orders (10+) (1)
 - PM Group Schedules (0)
 - Notes (0)
- Notes:** A section with 'Notes (0)'.
- Recent Items (1):** A list showing the current space '101 Main St' with its description.


1- Work Orders may be created directly on Spaces or the Space can be inherited from the Equipment/Asset.

2 - Preventive Maintenance Schedules, PM Group Schedules, PM Routes, and Work Orders can be created directly on a Space.

3 - If an Asset is moved to a new Space, subsequent Work Orders get created with the new Space reference while existing Work Orders retain references to the prior Space.


























Meters & Meter Readings

Track Runtime Hours/Miles/Consumption

 Meter **M-000002**

Description	Last Reading Value	Last Reading Date	Average Use (Units/Day)	UOM
Hot Water Tank Flow Meter	9,250.00	9/1/2020, 2:14 PM	36.36	Gallons

Related Details


Meter ID	M-000002	Owner	 Admin User
Description 	Hot Water Tank Flow Meter 	Type 	Continuous
UOM 	Gallons 		
Last Reading Value 	9,250.00	1 Asset ID 	Hot Water Tank
Last Reading Date 	9/1/2020, 2:14 PM	Asset Description 	Hot Water Tank
▼ Meter Usage Details			
Avg Use Calculated (Units/Day)	36.36	Auto Calculate Avg Use 	<input checked="" type="checkbox"/>
Avg Use Override (Units/Day)		Average Use Readings 	2
Average Use (Units/Day) 	36.36	Last Avg Use Update 	12/14/2020, 2:39 PM
Estimated Annual Use 	0.00 		
▼ Additional Details			
Revision 	1	2 External ID 	
Install Date 		Search 	Meter
Created By	 Admin User, 12/14/2020, 2:12 PM	Last Modified By	 12/15/2020, 11:34 AM
Record Type	Continuous 		

1 – Meters are linked to Assets

2 – Meter Readings can be imported referencing External IDs


Meters & Meter Readings (cont'd)

Track Runtime Hours/Miles/Consumption

 Meter
M-000001


Description	Last Reading Value	Last Reading Date	Average Use (Units/Day)	UOM
Delivery Truck Odometer	19,110.00	12/14/2020, 11:15 AM	26.25	Miles

Related Details

 Meter Readings (4) New


Meter Reading ID	Reading Date	Reading Value	UOM
MR-00000007	12/14/2020, 11:15 AM	19,110.00	Miles
MR-00000006	9/17/2020, 12:13 PM	16,800.00	Miles
MR-00000005	7/29/2020, 10:11 AM	14,525.00	Miles
MR-00000004	4/10/2020, 7:12 PM	12,253.00	Miles

[View All](#)

 PM Schedules (1) 3

PM Schedule #	Asset ID	Asset Description	PM Due Date
PM-000003	Delivery Truck	Class V Delivery Truck	

[View All](#)

 Meter History (2)

Date	Field	User	Original Value	New Value
12/14/2020, 12:19 PM	Slope			3,291,461.905
12/14/2020, 12:12 PM	Chatter			

3 - Meter Readings can be used to schedule Preventive Maintenance

Asset Groups

Asset Group
APV Lobe Pump

Details **Related**

Standard Work Tasks (1) [Settings] [Refresh] [New] [Change Owner]

1 item • Sorted by Std Task ID • Updated a few seconds ago

<input type="checkbox"/> Std Task ID ↑	Description	Est Hrs	Status
1 Monthly Maintenance APV Lobe Pump	Monthly Maintenance APV Lobe Pump	0.50	New

[View All](#)

Bills of Materials (1) [Settings] [Refresh] [New] [Change Owner]

1 item • Sorted by BOM ID • Updated a few seconds ago

<input type="checkbox"/> BOM ID ↑	Description	Revision	Status
1 BM-000000	APV Lobe Pump Parts List	1	Approved

[View All](#)

Model Work Orders (4) [Settings] [Refresh] [New] [Change Owner]

4 items • Sorted by Work Order • Updated a few seconds ago

<input type="checkbox"/> Work Order ↑	Description	Type	Status
1 WO-0000000	Monthly Maintenance	Preventive	Approved
2 WO-0000001	Weekly Inspection on APV Lobe Pump	Preventive	Approved
3 WO-0000002	Quarterly Maintenance	Preventive	Approved
4 WO-0000003	Annual Maintenance	Preventive	Approved

[View All](#)

Equipment/Assets (1) [Settings] [Refresh] [New] [Change Owner]

1 item • Sorted by Asset ID • Updated a few seconds ago

<input type="checkbox"/> Asset ID ↑	Description	Status	Location	Record Type
1 Mash Mixer Pump	Mash Mixer Pump	In Service		Equipment

[View All](#)

Notes (0) [New]

Asset Groups are used to help organize: (1) Standard Work Tasks, (2) Bills of Materials, (3) Model Work Orders, and (4) Equipment/Assets

Bills of Materials

Predefined Parts Lists Accessed via Work Orders

Bill of Materials
BM-000000

Description: APV Lobe Pump Parts List Status: Approved Asset Group: APV Lobe Pump **1**

Details **Related**

BOM Items (10+) Settings Refresh New

10+ items • Sorted by Item Master ID • Updated a minute ago

BOM Item: BOM Item ID	Item Master ID	Item Description	BOM Qty
1 BI-000019	J820149	SCREW - Set	2
2 BI-000023 2	M03AP331034	SHAFT and GEAR ASSEMBY - Long	1
3 BI-000024	M03AP331036	SHAFT and GEAR ASSEMBY - Short	1
4 BI-000020	M03HP331030	NUT - Bearing Adjustment	1
5 BI-000017	M03HP331031	NUT - Bearing Adjustment and Seal Retainer	1
6 BI-000007	M03HP331037	BACKPLATE	1
7 BI-000008	M03HP331051	BEARING - Seal (Stainless Steel)	2
8 BI-000010	M03HP331077	STUD - Hex	4
9 BI-000001	M03HP331499	COVER	1
10 BI-000021	M521V007222	SCREW - Hex Head Cap	4

[View All](#)

1 – Organized by Asset Group

2 – List of Parts presented to user on a Work Order