AssetOptics
Quick Start Learning Series

Work Management

Learning Objectives

1. Work Order objects & definitions
2. Work Order Lifecycle & Statuses
3. Work Order Recordtypes
4. Creating a Work Order
5. Scheduling a Work Order
6. Completing a Work Order
7. Understanding Work Order Costing

Definitions – Work Management

Work Orders – The top-level work document where costs are accumulated and an overall work status is tracked (i.e., Scheduled, In Progress, Completed, etc.)

Planned Stock– Defines the planned and actual Stock Items (parts) use for a work order.

WO Misc Costs – Tracks service item (non-Stock Items) and other charges to a work order; plan vs. actual.

Work Tasks – Represents a single piece of work that is performed by a specific craft. Planned Labor Hours are defined at the WO Task level. The completion progress is denoted as “Percent Completion”; i.e. 50%, 100%. Can be cloned from a WO Standard Task.

Definitions – Work Management

Task Labor – Captures actual work hours recorded against a WO Task (Regular, OT and DT Hours)

Work Assignments – Defines WHO (user) is performing the WO Task and, optionally, WHEN they are performing the work.

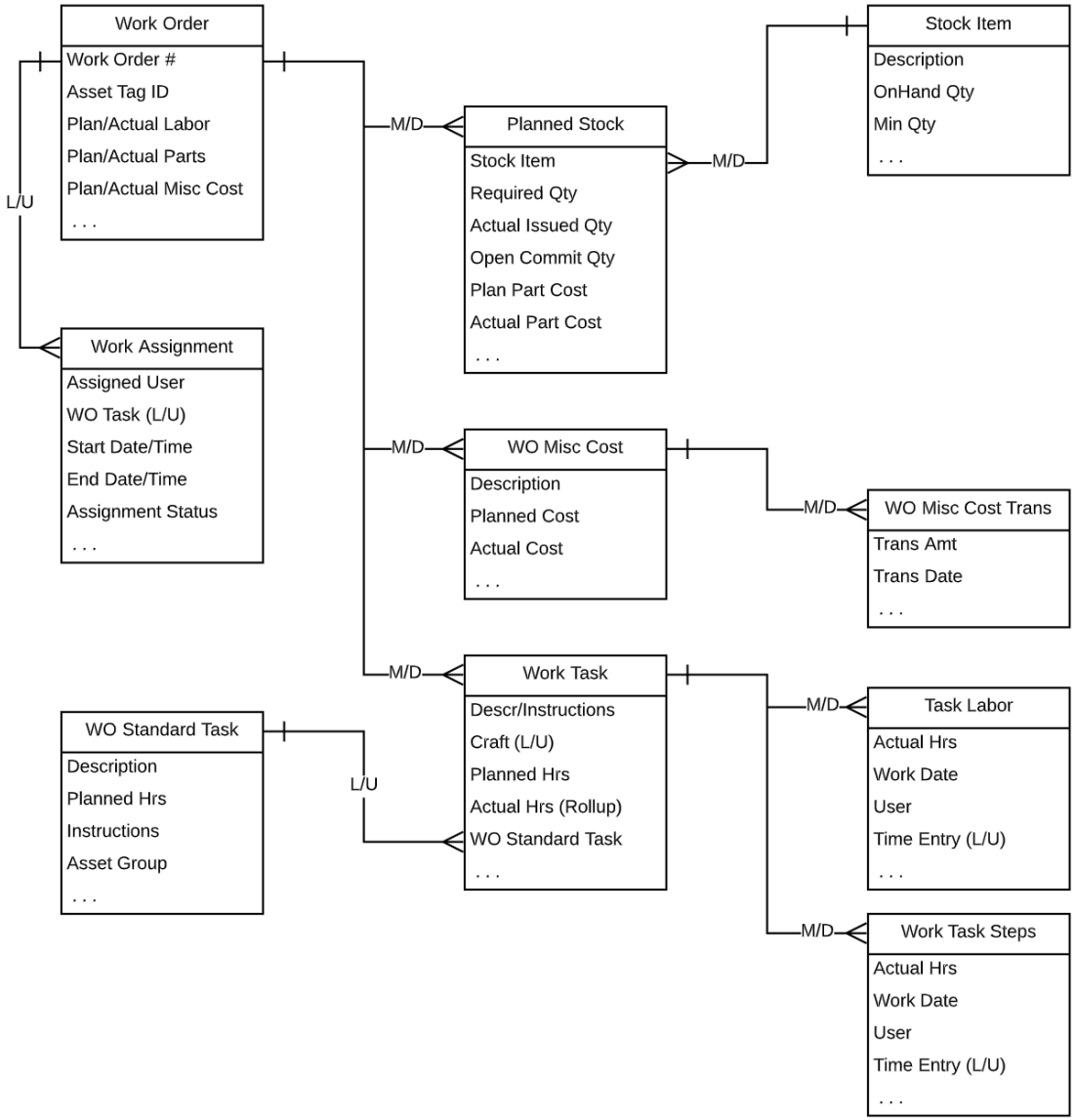
Standard Work Tasks – A predefined Work Task

Summary: The Work Order defines the overall scope of work. A WO Task defines a specific piece of work for a craft group. The WO Assignment defines who is doing the work and when they are doing it.

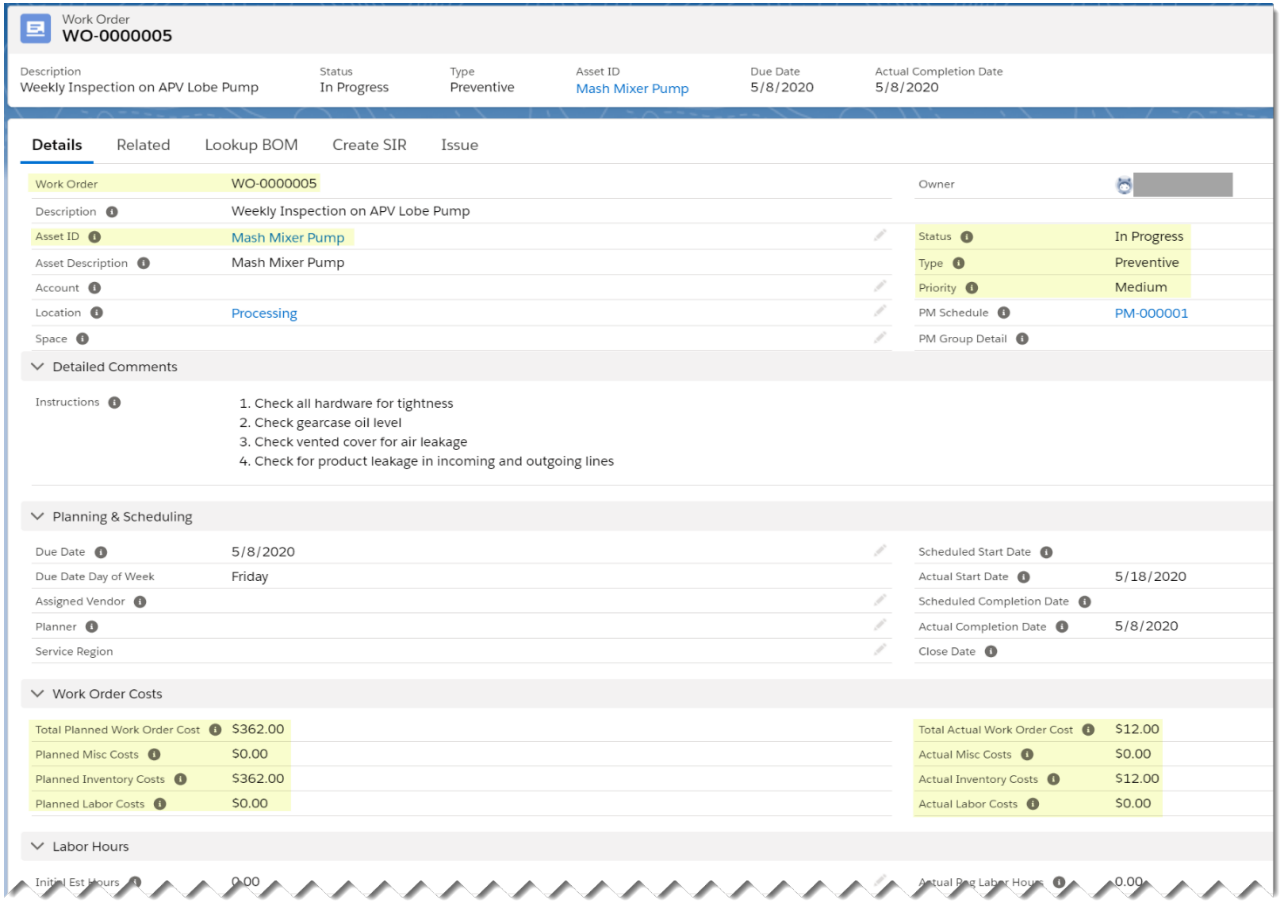
Work Management Data Model

L/U means Lookup

M/D means Master-Detail



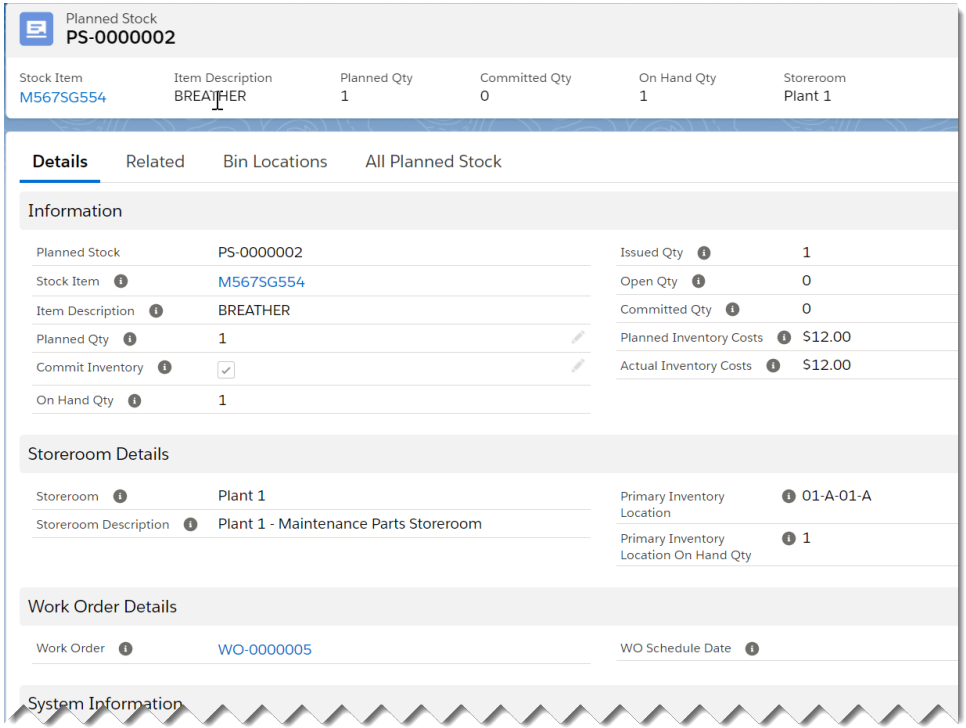
Work Order



Work Orders are related to Assets. Overall job status is tracked at the Work Order. All Planned & Actual Costs are summarized at the Work Order.

Planned Stock

What Stock Items are planned and used on a Work Order

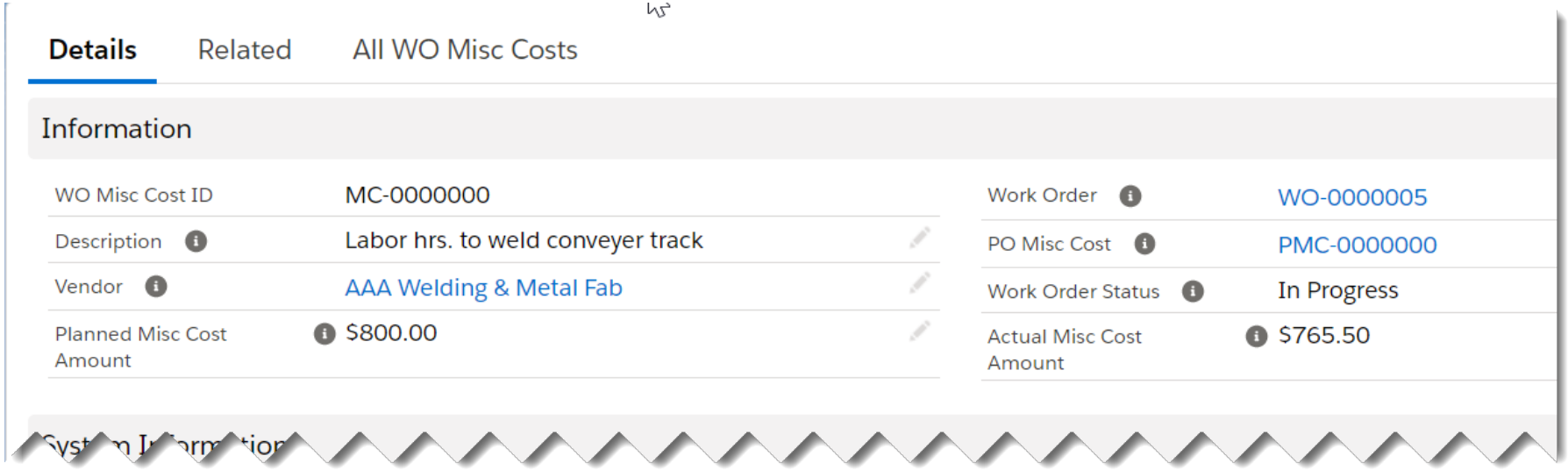


Commit Inventory – Check to enable stock reservations.

Open Qty = Planned Qty – Issued Qty. If the Work Order is “open” and Commit Inventory is checked, then Open Commit Qty = Open Qty

WO Misc. Costs

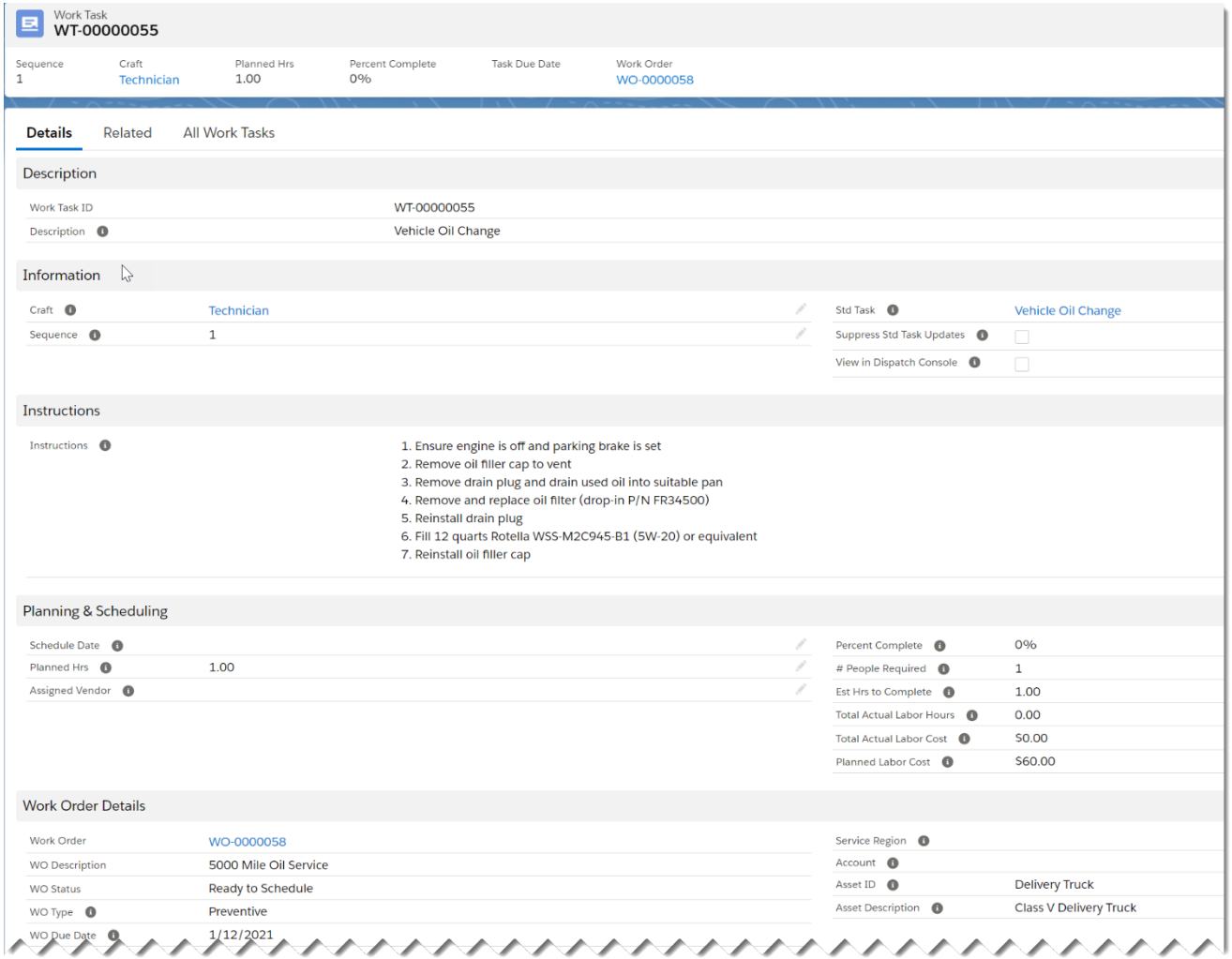
What are the non-labor and non-part charges on a Work Order



Work Order Misc. Costs can be directly entered from the Work Order, or automatically created and updated from a Purchase Order Misc. Cost line.

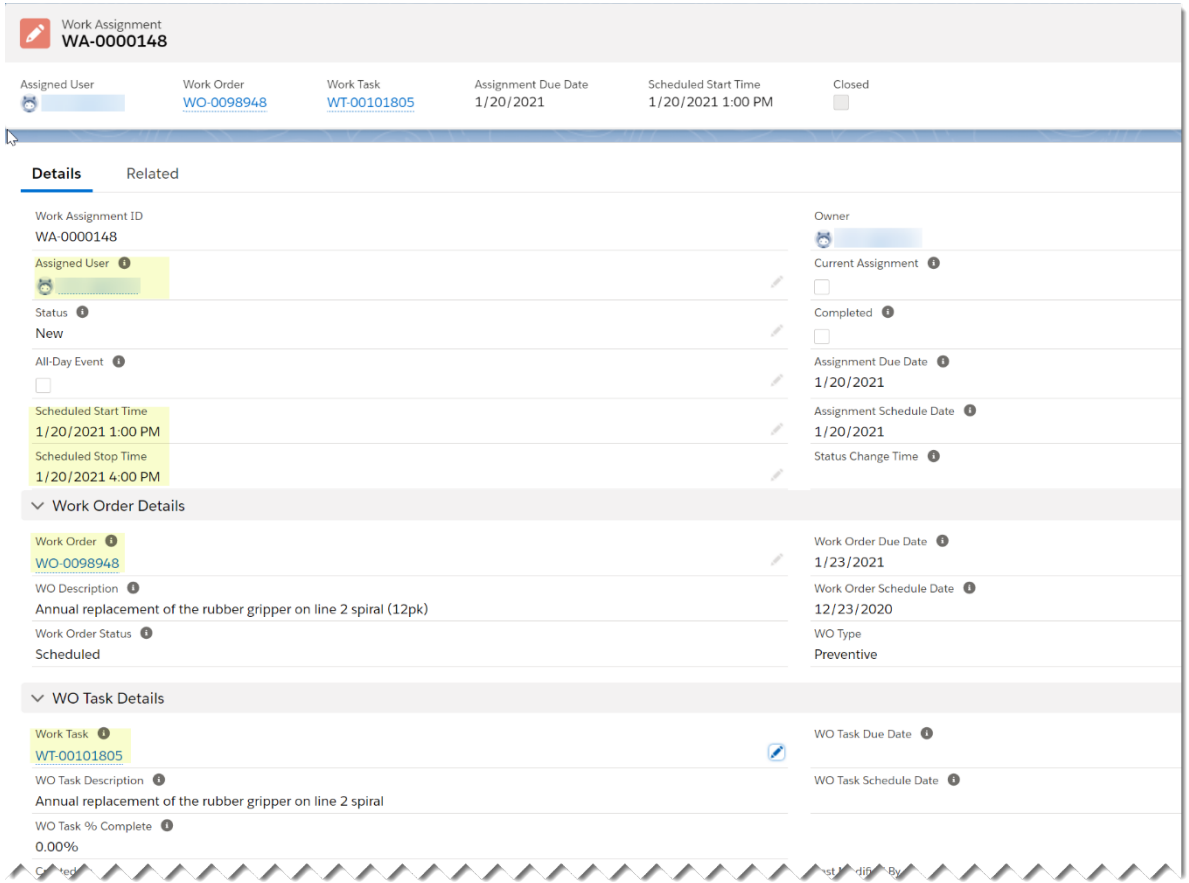
Work Tasks

What are the specific work instructions, by Craft, on a Work Order



Work Assignments

WHO is doing WHAT work task WHEN



WO Assignments can be manually created or automatically created by dragging and dropping work order tasks on the Dispatch Console.

Standard Work Tasks

Predefined Work Task Instructions

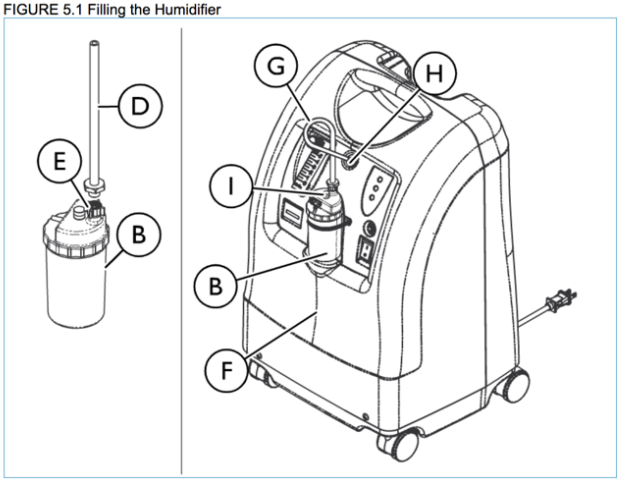
Standard Work Task Detail Edit | Delete | Clone | Update Work Tasks

Std Task ID	ST-000022	Owner	[redacted] [Change]
Asset Group	Perfecto Concentrators	Status	Approved
Description	Invacare Perfecto 2 Installation/Setup	Std Task Number	000022
Est Hrs	0.50	Work Task Updates Pending	

Instructions **Plug In power Cord**

1. Remove cap from bottle.
2. Fill humidifier with distilled water to the level indicated by the manufacturer. Replace the humidifier cap and securely tighten.

FIGURE 5.1 Filling the Humidifier



3. Insert a flathead screwdriver in the plate groove on the top edge of the filter access door and gently pry the filter access door off (FIGURE 5.2).
4. Pull up and remove the humidifier bottle adapter
5. Attach the humidifier bottle adapter to the humidifier bottle by turning the wing nut on the humidifier bottle counterclockwise until it is securely fastened.
6. Place the humidifier bottle/adapter assembly in the humidifier compartment on the concentrator.
7. Attach oxygen tubing from the humidifier bottle/adapter assembly to oxygen outlet connector on the concentrator.
8. Attach the cannula/patient supply tubing to the humidifier bottle outlet.
9. After assembly, ensure that oxygen is flowing through the cannula

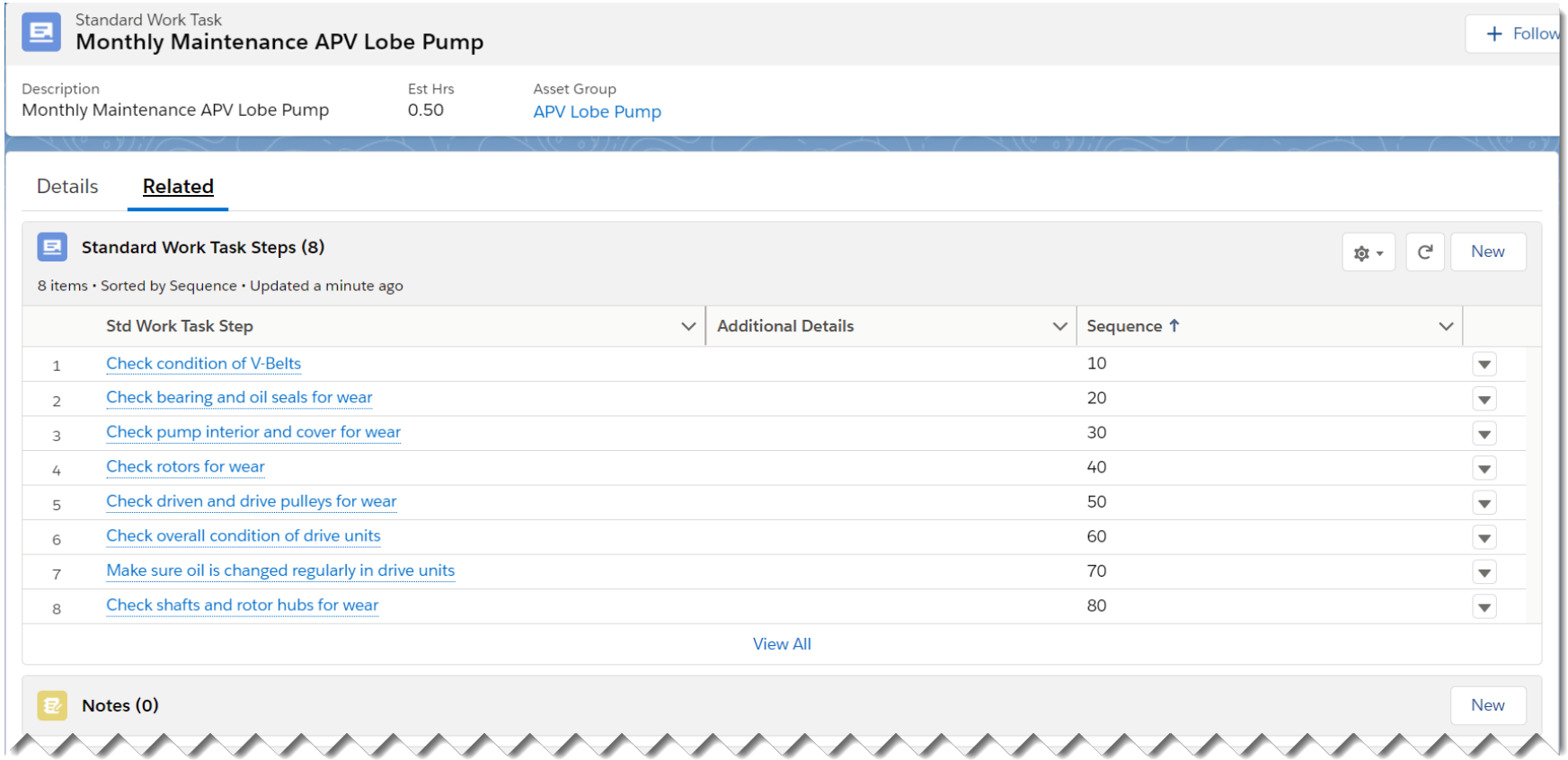
Created By	[redacted] 2/4/2016 9:39 AM	Last Modified By	[redacted] 3/21/2018 3:13 PM

Edit | Delete | Clone | Update Work Tasks

Instructions can be rich text with embedded images. . . . Or . . .

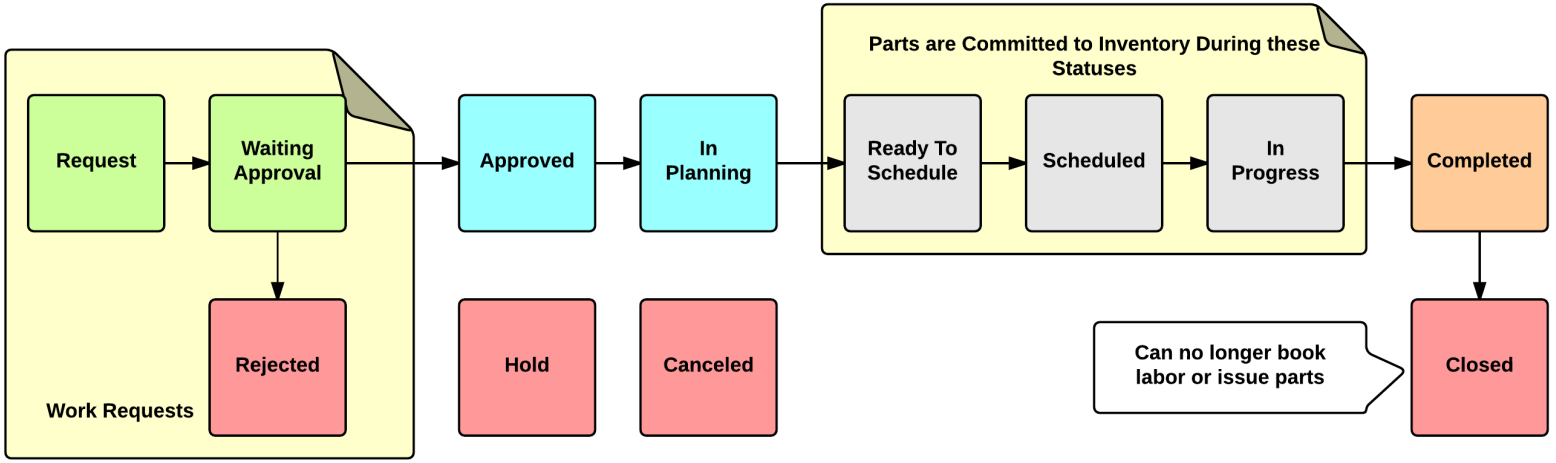
Standard Work Tasks

Predefined Work Task Instructions



. . . Instructions can be checklist items. Both are predefined & reusable.

Work Order Status Flow



- Stock Items are committed when the Work Order Status = Ready to Schedule, Scheduled or In Progress (these are the “open” statuses).
- Stock Items can be issued to a Work Order and labor can still be recorded to a Work Task when the Status = Completed.
- The predefined Work Order Statuses are incorporated into the application logic. While you can deactivate Statuses, you may NOT add user defined statuses to the picklist.

Work Order Recordtypes

The recordtype is an underlying class of a record. Different recordtypes can present different page layouts to the user and also have different picklist values. Since Work Order Status is a picklist, each recordtype has its own Status flow.

- **Request** – A request for work to be performed.
- **Preventive** – Creates via PM or PM Group Schedules.
- **Corrective –** Standard corrective or break-fix work order.
- **Model Work Order** – A job template.

Work Order Costing

There are three (3) cost buckets on a Work Order:

1. Labor – Planned comes from Work Task Plan Hrs & Craft rate. Actual comes from Task Labor Hrs and rate on User record.
2. Parts Costs – Planned comes from Planned Stock Plan Qty * Unit Cost. Actual from Issued Qty * Unit Cost
3. Misc Costs - Plan Misc Cost and Actual Misc Cost