

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 Order

Work Order
WO-0000005

Description: Weekly Inspection on APV Lobe Pump Status: In Progress Type: Preventive Asset ID: Mash Mixer Pump Due Date: 5/8/2020 Actual Completion Date: 5/8/2020

Details Related Lookup BOM Create SIR Issue

Work Order: WO-0000005 Owner: [User]

Description: Weekly Inspection on APV Lobe Pump

Asset ID: Mash Mixer Pump Status: In Progress

Asset Description: Mash Mixer Pump Type: Preventive

Account: [Account] Priority: Medium

Location: Processing PM Schedule: PM-000001

Space: [Space] PM Group Detail: [Detail]

▼ Detailed Comments

Instructions:

1. Check all hardware for tightness
2. Check gearcase oil level
3. Check vented cover for air leakage
4. Check for product leakage in incoming and outgoing lines

▼ Planning & Scheduling

Due Date: 5/8/2020 Scheduled Start Date: [Date]

Due Date Day of Week: Friday Actual Start Date: 5/18/2020

Assigned Vendor: [Vendor] Scheduled Completion Date: [Date]

Planner: [Planner] Actual Completion Date: 5/8/2020

Service Region: [Region] Close Date: [Date]

▼ Work Order Costs

Total Planned Work Order Cost	\$362.00	Total Actual Work Order Cost	\$12.00
Planned Misc Costs	\$0.00	Actual Misc Costs	\$0.00
Planned Inventory Costs	\$362.00	Actual Inventory Costs	\$12.00
Planned Labor Costs	\$0.00	Actual Labor Costs	\$0.00

▼ Labor Hours

Initial Est Hours: 0.00 Actual Reg Labor Hours: 0.00

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

The screenshot displays the 'Planned Stock' interface for item M567SG554. At the top, a table shows the following data:

Stock Item	Item Description	Planned Qty	Committed Qty	On Hand Qty	Storeroom
M567SG554	BREATHER	1	0	1	Plant 1

Below the table, the 'Details' tab is active, showing the following information:

- Information:**
 - Planned Stock: PS-0000002
 - Stock Item: M567SG554
 - Item Description: BREATHER
 - Planned Qty: 1
 - Commit Inventory:
 - On Hand Qty: 1
 - Issued Qty: 1
 - Open Qty: 0
 - Committed Qty: 0
 - Planned Inventory Costs: \$12.00
 - Actual Inventory Costs: \$12.00
- Storeroom Details:**
 - Storeroom: Plant 1
 - Storeroom Description: Plant 1 - Maintenance Parts Storeroom
 - Primary Inventory Location: 01-A-01-A
 - Primary Inventory Location On Hand Qty: 1
- Work Order Details:**
 - Work Order: WO-0000005
 - WO Schedule Date: [empty]
- System Information:** [empty]

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

Details	Related	All WO Misc Costs
Information		
WO Misc Cost ID	MC-0000000	Work Order ⓘ WO-0000005
Description ⓘ	Labor hrs. to weld conveyer track	PO Misc Cost ⓘ PMC-0000000
Vendor ⓘ	AAA Welding & Metal Fab	Work Order Status ⓘ In Progress
Planned Misc Cost Amount	ⓘ \$800.00	Actual Misc Cost Amount ⓘ \$765.50
System Information		

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 Task
WT-0000055

Sequence	Craft	Planned Hrs	Percent Complete	Task Due Date	Work Order
1	Technician	1.00	0%		WO-000058

Details | Related | All Work Tasks

Description

Work Task ID	WT-0000055
Description	Vehicle Oil Change

Information

Craft	Technician	Std Task	Vehicle Oil Change
Sequence	1	Suppress Std Task Updates	<input type="checkbox"/>
		View in Dispatch Console	<input type="checkbox"/>

Instructions

1. Ensure engine is off and parking brake is set
2. Remove oil filler cap to vent
3. Remove drain plug and drain used oil into suitable pan
4. Remove and replace oil filter (drop-in P/N FR34500)
5. Reinstall drain plug
6. Fill 12 quarts Rotella WSS-M2C945-B1 (5W-20) or equivalent
7. Reinstall oil filler cap

Planning & Scheduling

Schedule Date		Percent Complete	0%
Planned Hrs	1.00	# People Required	1
Assigned Vendor		Est Hrs to Complete	1.00
		Total Actual Labor Hours	0.00
		Total Actual Labor Cost	\$0.00
		Planned Labor Cost	\$60.00

Work Order Details

Work Order	WO-000058	Service Region	
WO Description	5000 Mile Oil Service	Account	
WO Status	Ready to Schedule	Asset ID	Delivery Truck
WO Type	Preventive	Asset Description	Class V Delivery Truck
WO Due Date	1/12/2021		

Work Assignments

WHO is doing WHAT work task WHEN

The screenshot shows a 'Work Assignment' details page for ID WA-0000148. At the top, there is a header bar with the ID and a pencil icon. Below this is a summary row with fields: Assigned User (with a user icon), Work Order (WO-0098948), Work Task (WT-00101805), Assignment Due Date (1/20/2021), Scheduled Start Time (1/20/2021 1:00 PM), and a Closed checkbox. The main content area is divided into 'Details' and 'Related' tabs. The 'Details' tab is active and shows a list of fields for the assignment, including Work Assignment ID, Assigned User, Status (New), All-Day Event, Scheduled Start Time, and Scheduled Stop Time. Below this are sections for 'Work Order Details' and 'WO Task Details', each containing fields for ID, description, status, due date, and schedule date. The bottom of the page shows a 'Created' field and a 'Last Modified By' field.

Field	Value
Work Assignment ID	WA 0000148
Assigned User	[User Icon]
Status	New
All-Day Event	<input type="checkbox"/>
Scheduled Start Time	1/20/2021 1:00 PM
Scheduled Stop Time	1/20/2021 4:00 PM
Work Order ID	WO-0098948
Work Order Description	Annual replacement of the rubber gripper on line 2 spiral (12pk)
Work Order Status	Scheduled
Work Order Due Date	1/23/2021
Work Order Schedule Date	12/23/2020
Work Order Type	Preventive
Work Task ID	WT-00101805
Work Task Description	Annual replacement of the rubber gripper on line 2 spiral
Work Task % Complete	0.00%
Work Task Due Date	[Due Date]
Work Task Schedule Date	[Schedule Date]

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 [Change]

Asset Group Perfecto Concentrators Status Approved

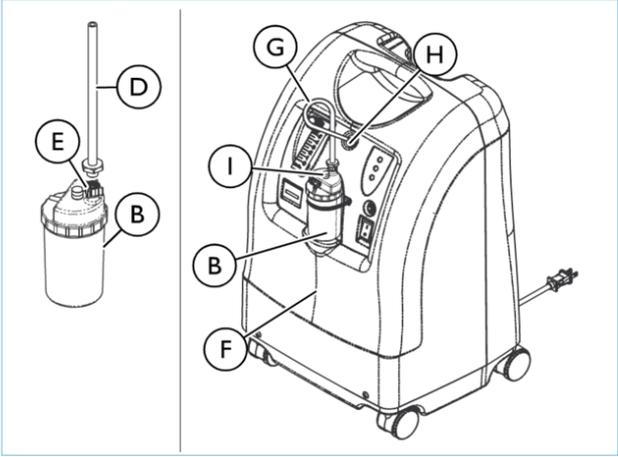
Description Invacare Perfecto 2 Installation/Setup Std Task Number 000022

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

Standard Work Task
Monthly Maintenance APV Lobe Pump + Follow

Description: Monthly Maintenance APV Lobe Pump Est Hrs: 0.50 Asset Group: [APV Lobe Pump](#)

Details Related

Standard Work Task Steps (8) Settings Refresh New

8 items • Sorted by Sequence • Updated a minute ago

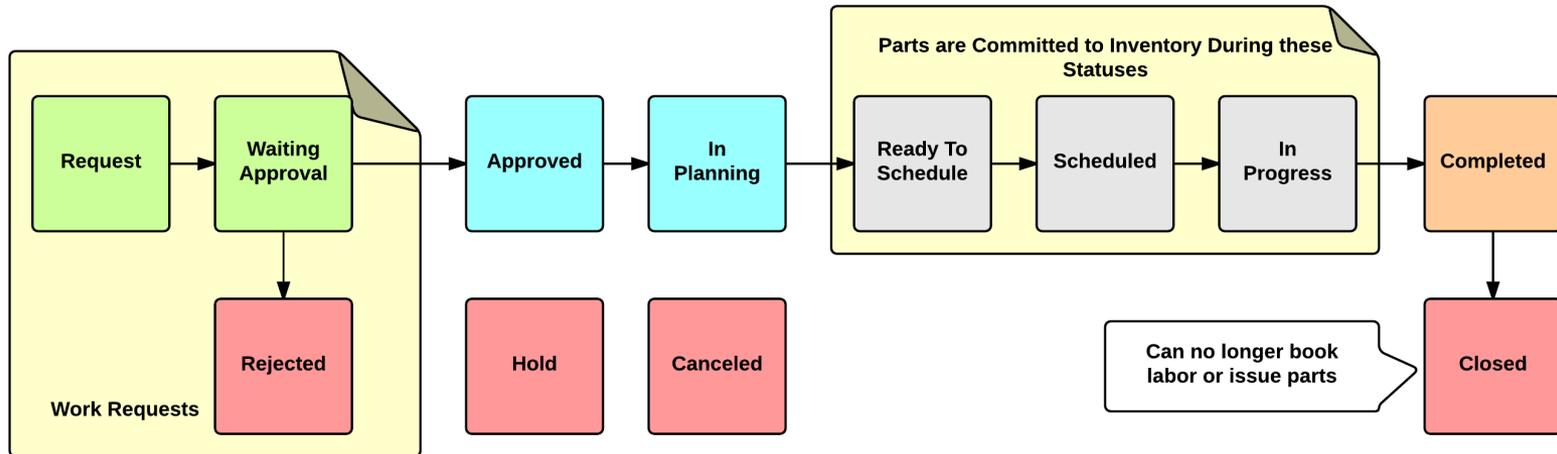
Std Work Task Step	Additional Details	Sequence ↑	
1 Check condition of V-Belts		10	▼
2 Check bearing and oil seals for wear		20	▼
3 Check pump interior and cover for wear		30	▼
4 Check rotors for wear		40	▼
5 Check driven and drive pulleys for wear		50	▼
6 Check overall condition of drive units		60	▼
7 Make sure oil is changed regularly in drive units		70	▼
8 Check shafts and rotor hubs for wear		80	▼

[View All](#)

Notes (0) New

... 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