

AssetOptics Quick Start Work 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

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: Work Order Record Types, Work Tasks, Work Assignments, Planned Stock, Work Order Scheduling, and Work Order Costing.

Definitions: The Work Management Data Model consists of several interrelated objects, which together help you manage the process of performing work, consuming parts, recording time, and tallying costs. The following key terms will become easier to understand as you work through the exercise.

- “Work Order” – the top-level work document where costs are accumulated and an overall work status (i.e., Scheduled, In Progress, Completed, etc.) is tracked.
 - “Work Task” – a single unit of work that is performed by a specific Craft. Planned Labor Hours are defined at this level.
 - “Standard Work Task” – a predefined work task from which a Work Task may be optionally cloned.
 - “Task Labor” – captures the actual work hours recorded against a Work Task (Regular, OT and DT Hours)
 - “Craft” – specific labor resources (e.g., master electrician, plumber, maintenance tech) and (optionally) their associated labor rate available to a Work Task. Used to calculate Planned Labor Costs on Work Tasks.
 - “Planned Stock” – defines the planned quantity of Stock Items for a work order.
 - “Miscellaneous Costs” – charges to a Work Order that are NOT derived from Task Labor entries or issued stock items (e.g., purchase of non-Stock Item parts or outside labor).
 - “Work Assignments” – defines WHO (user) is performing a Work Task and (optionally) WHEN they are performing the work.

Action: Select the **Work Orders** tab. Choose **All Corrective Work Orders** from the drop-down menu. Select any corrective work order from the list. Using either (or both of) the **Related** tab and the **Quick Links** pane, find and review each of the terms defined above.

Exercise:

1. Create a new Work Order (record type: Corrective) with the following details.

Description: Repair leaky seal on MM pump


Asset ID: Mash Mixer Pump

Priority: Urgent

2. From the **Quick Links** pane on the Work Order, note that a **Work Task** may have been automatically generated with planned labor hours and costs prefilled. These default *Work Order Parameters* may be adjusted under *Custom Settings* in Setup.
3. Edit (or create if necessary) the Work Task and choose any available **Craft** (search “cr”). The **Planned Labor Cost** for the Work Task will be updated to reflect the hourly rate of the selected craft multiplied by the planned hours.
4. Create a new **Planned Stock** entry on the Work Order. Search Stock Items for the phrase “pump seal” and choose Stock ID M543S131312 and Quantity 1. If this item is available in more than one Storeroom, choose the first one.
5. Return, if necessary, to the **Work Order** and in the section labeled Work Order Costs note the difference between Planned Inventory Costs and Actual Inventory Costs (the latter should be zero as no stock items have been issued to the Work Order).
6. Navigate to the **Planned Stock** record page created in Step 3. Click on the “Issue” action button in the header to issue stock items from planned stock. Enter and issue a quantity of 2 (rather than 1 as planned).
7. Return to the **Work Order Costs** section of the Work Order and note the difference between Planned Inventory Costs and Actual Inventory Costs. Actual Inventory Costs should be twice the Planned Inventory Costs.

Work Order Costs

Total Planned Work Order Cost ⓘ \$75.00	Total Actual Work Order Cost ⓘ \$50.00
Planned Misc Costs ⓘ \$0.00	Actual Misc Costs ⓘ \$0.00
Planned Inventory Costs ⓘ \$25.00	Actual Inventory Costs ⓘ \$50.00
Planned Labor Costs ⓘ \$50.00	Actual Labor Costs ⓘ \$0.00

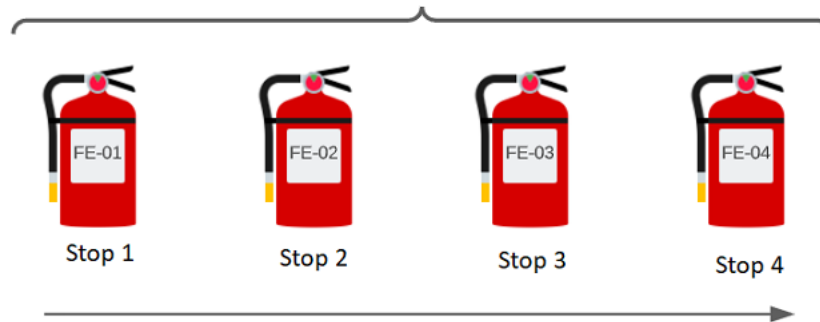


8. Change the **Status** of the Work Order to In Progress. The Actual Start Date of the Work Order should have updated to today's date.
9. Navigate to the **Work Task** record page. Create a new **Task Labor** entry and record .75 Regular Hours and select *your name* as the **User Resource**.
10. Return to the **Work Order Costs** section of the Work Order and note the Planned and Actual Labor Costs (if there are no labor rates assigned to your username in Setup then labor costs will be calculated as zero).
11. Change the **Status** of the Work Order to Completed.

Definitions: In the preceding exercise we created a *corrective* work order in response to an unplanned event (a leaky seal). There are additional types of work orders you should be familiar with.

- “Work Request” – as the name denotes, this is simply a work order that is subject to an approval process.
- “Model Work Order” – a predefined job plan or template, typically including instructions, Work Tasks and/or Planned Stock.
- “Preventive Work Order” – a system-generated Work Order cloned from a Model Work Order. Preventive Work Orders are scheduled and automatically released according to calendar- or meter-based logic defined by the user (e.g., Quarterly Generator Test, 5000 Mile Oil Change).
- “Preventive Maintenance Routes” – PM Routes are used to organize PM *Route Stops*, which comprise an Equipment/Asset and a Standard Work Task. The PM Route contains calendar-based scheduling logic to create and release Route & Route Stop Work Orders in a Parent/Child relationship.

PMR-000023 Monthly Fire Extinguisher Inspection
WO-000045 (Route)



Exercise: In this exercise you will create a new asset record and corrective work order. You will perform many of the routine steps associated with a work order, such as choosing a Work Task, scheduling, and assigning the work order, etc. The goal is to familiarize yourself with the various options and permutations associated with a work order.

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

Asset ID: Lobe Pump 2

Description: 30-liter lobe pump

Status: In Service

Asset Location: Fermentation

Asset Group: APV Lobe Pump

2. Create a new Work Order (record type: Corrective) on the newly created asset with the following details.

Description: Monthly Service on Lobe Pump

Problem Description / Scope of Work: Perform associated work tasks

Due Date: [enter last day of current month]

3. Navigate, if necessary, to the newly created Work Order and open it. **Delete** any Work Task that may have been automatically created.
4. Create a new **Work Task**. Do not enter a description. Choose a **Craft**, such as General Maintenance. Search for and select the **Standard Work Task** labeled “Monthly Maintenance APV Lobe Pump.”
5. Open the newly created Work Task and observe that the Description, Instructions, Work Task Steps, and Planned Hours have been inherited from the Standard Work Task selected in the preceding step.

6. Create a second **Work Task** with the following details:

Description: Change Gear Oil

Craft: General Maintenance

Sequence: 2


Planned Hours: 1

7. Open the newly created Work Task and create **Work Task Steps** as follows:

Work Task Step	Sequence
Power off pump	1
Drain oil	2
Replace drain plug	3
Refill gear oil 8 quarts	4
Power on pump	5

8. Refresh the Work Task page, if necessary, and observe the newly created Work Task Steps.

Work Task Steps

 Complete Steps

Mark All As Completed

- > Power off pump
- > Drain oil
- > Replace drain plug
- > Refill gear oil 8 liters
- > Power on pump

9. Navigate, if necessary, back to the Work Order and add a new **Planned Stock** item to the Work Order with the following details:

Stock Item: Gasket (choose any gasket)

Planned Qty: 1

10. Navigate, if necessary, back to the Work Order and click the **Bill of Materials** action button in the header. Choose the Bill of Materials for “APV Lobe Pump Parts List” and select Stock Item M543SP188 (SEAL – front oil). Click **Add to Work Order** to continue.

Steps 9 and 10 represent two ways of adding Planned Stock to a Work Order. Creating Bills of Materials for Asset Groups enables you to predefine the type and quantity of parts needed to perform maintenance on an asset.

11. Navigate, if necessary, back to the Work Order and click the **New Assignment** action button in the header. Assign each of the two Work Tasks to users (if possible, pick users other than yourself).

Tip: Search “wt” to retrieve all the Work Tasks associated with the work order.

12. Navigate, if necessary, back to the Work Order and enter a **Scheduled Start Date** for the 27th of the current month.

13. Navigate to either of the Work Assignments and note the **Assignment Schedule Date**.

Record the value for Assignment Schedule Date: _____

14. Edit each of the two **Work Tasks** by entering a **Schedule Date** of the 28th of the current month.

15. Navigate again to either of the Work Assignments and note the **Assignment Schedule Date**.

Record the value for Assignment Schedule Date: _____

16. While still on the Work Assignment, fill in the **Scheduled Start Time** as 9:00 AM on the 29th of the current month and **Scheduled End Time** as 9:30 AM the same day.

Record the value for Assignment Schedule Date: _____

Steps 12-16 demonstrate how the Assignment Schedule Date on a Work Assignment may be defined (optionally) at increasing levels of granularity.

17. Change the **Status** of the Work Order to In Progress.

18. Navigate back to the Work Order and from the Quick Links pane open the record page for one of the **Planned Stock Items** you added in the earlier exercise. Use the action button to **Issue** a quantity of 1 planned stock items from the primary bin to the work order.

19. Navigate back to the Work Order and from the Quick Links pane create a new **Inventory Transaction**. Search for stock item “nut” and choose any nut with an available quantity and

issue 2 to the Work Order.

Actual Inventory Costs will reflect the additional cost of issuing unplanned stock items to the work order. A Planned Stock record will also be created with a Planned Qty of 0 and Issued Qty of 2.

20. Navigate to the Work Task called “Monthly Maintenance APV Lobe Pump” and **Complete Work Task Steps**.
21. Navigate to the Work Task called “Change Gear Oil.” Complete 3 of the 5 Work Task Steps and manually enter a value of 60% for **Percent Complete**.
22. Add 1 regular hour of **Task Labor** to the Work Task (select yourself for User Resource). Total Actual Labor Hours and Total Actual Labor Costs will accumulate on both the Work Task and Work Order.
23. Navigate back to the Work Order and from the Quick Links pane create a new **Miscellaneous Cost** for “Engineering Consultation” and an Actual Misc Cost Amount of \$300.
24. Change the **Status** of the Work Order to Completed. Review the **Work Order Costs** section of the Work Order to see how planned and actual inventory, labor, and miscellaneous costs were affected by actions taken throughout the exercise.