

## AssetOptics Quick Start Preventive Maintenance – PM Routes 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: Creating a PM Route with multiple Route Stops; Completing a PM Route and creating Follow-Up Work Orders.

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**Definitions:** In previous exercises you learned about PM Schedules and PM Group Schedules, either of which may be used to plan maintenance on a *single* piece of Equipment/Asset (or a single Space). Some work environments require the performance of repetitive or routine maintenance on a *series* of similar Assets, therefore a third scheduling option exists: PM Routes. A PM Route enables the user to assign one Work Task to multiple Assets (or Spaces) and to specify a sequence of Route Stops, each corresponding to the individual Assets. One Route Work Order is created; that is, one “parent” work order is created, and each Route Stop Work Order is a “child” of the parent. The work order history for each individual asset is maintained, but the user has only to interact with the top-level work order.

*You can find a more in-depth description of these concepts in the PM Routes Knowledge Base article at [www.assetoptics.com](http://www.assetoptics.com)*

**Exercise:** In this exercise you will be creating a PM Route to perform a monthly inspection on a series of fire extinguishers installed throughout the Brewery’s production area.

1. Create a new **PM Route** with the following details.

**Route Description:** Monthly Fire Extinguisher Inspection

**Craft:** General Maint

**Release Window:** 7

**PM Due Date Override:** [the 1st of next month]

**Calendar Interval:** 1

**Calendar Interval UOM:** Months

**Autorelease:** Checked

**Floating Interval:** Unchecked

2. Create **Route Stops** for *each* of the eight fire extinguisher assets preloaded into the sample data set. A Standard Work Task with Work Task Steps has already been created.

**Equipment/Asset:** FEX-01 (FEX-02, FEX-03...FEX-08)

**Standard Work Task:** Monthly Fire Extinguisher Inspection

**Sequence:** 10 (20, 30...80)

3. From the **Quick Links** pane of the PM Route record page, review the newly created Route Stops and correct any mistakes.

	Route Stop ID	Equipment/Asset	Space	Standard Work Task	Planned Hours	Sequence
1	RS-000007	FEX-01		Monthly Fire Extinguisher Inspection	0.20	10
2	RS-000008	FEX-02		Monthly Fire Extinguisher Inspection	0.20	20
3	RS-000009	FEX-03		Monthly Fire Extinguisher Inspection	0.20	30
4	RS-000010	FEX-04		Monthly Fire Extinguisher Inspection	0.20	40
5	RS-000011	FEX-05		Monthly Fire Extinguisher Inspection	0.20	50
6	RS-000012	FEX-06		Monthly Fire Extinguisher Inspection	0.20	60
7	RS-000013	FEX-07		Monthly Fire Extinguisher Inspection	0.20	70
8	RS-000014	FEX-08		Monthly Fire Extinguisher Inspection	0.20	80

4. On the PM Route record page, click the **New PM Work Order** action button in the header to manually create a work order.
5. Navigate to the newly created **Work Order**.
6. From the **Quick Links** pane on the Work Order record page, observe that there are eight **Child Work Orders** corresponding to each Route Stop.
7. Similarly, in the **Work Order Hierarchy** click the caret to expand the hierarchy and you will observe the same parent/child relationship between Work Order record types.
8. On the Route Work Order, click the **Complete Route Work Order** action button in the header. This will launch a Flow that will loop the user through each Route Stop allowing them to mark complete the Work Task Steps for each stop.
9. Complete the Steps for the first Route Stop (asset: FEX-01) and continue to the next stop.
10. On the second Route Stop (asset: FEX-02) click the caret on the second Work Task Step ("Ensure Instruction Label is present and legible") and record a comment saying "Label is missing" and save. Before clicking next, check the box to **Create Follow-Up Work Request** and in the **Scope of Work / Requested Repairs** field enter "Instruction label needs replacement."
11. Continue completing the Route Stops for the remaining assets. You may log comments

and/or create follow-up work requests as you wish for learning purposes. Note that you may **Skip** a Route Stop or **Cancel** to exit the Flow at any time. When you invoke the Flow a second time by clicking the Complete Work Order action button you will be presented with the option of continuing to the Open Work Orders only or reviewing all Route Stop Work Orders.

*Note: While you are likely completing this exercise using the browser application, this Flow is optimized for users of smart phones and tablets running the Salesforce mobile app.*

12. From the **Work Orders** tab locate and open the Work Order (Follow-Up Work Request) you created for FEX-02 in Step 10. Note the Description was automatically generated (“Follow up Work Order for WO-0000xx”), and the Problem Description contains your remarks.
13. In the **Work Order Hierarchy** pane expand the caret for the Work Order corresponding to the second Route Stop (i.e., the Work Order for which the Follow-Up Work Request was made). Note that the Work Request is a child record of this Work Order. Once approved, the Record Type for this Work Order will automatically be changed from Work Request to Corrective.

∨ <a href="#">WO-0000045</a>	Completed	Route Stop
> <a href="#">WO-0000052</a>	Request	Work Request

*Tips: It is recommended that the number of Route Stops be limited to the amount of work that a single user could complete in a single work event. It is likewise recommended that Work Assignments be created for one user only and at the Route Work Order level.*