

# Basic Tutorials

## Session 8 - Equipment, Tools and Task Lists on Work Orders (time: 10 minutes)

### Assumptions

1. You have completed sessions 1 through 7.

### Notes

1. On this session we will make use of:
  - The maintenance plan you created on session 4,
  - The equipment item you created on session 5,
  - The tool item you created on session 6 and
  - The task list you created on session 7
2. We will import the equipment, the tool and the task list onto the scheduled work order generated by the maintenance plan.

### Proceed as Follows

#### 1. Find the Tool ID (will be required later)

- Go to “Assets” → “Equipment & Tools” and select “Tools” on the “Search Console” on the left. Click the “Show” button. The tool you added on session 6, should be on the list.
- Make a note of the ID number (the left most number in blue on the tool row).

#### 2. Edit the Maintenance Plan Source Work Order

- Go to “Maintenance” → “Maintenance Plans” and find the plan you created on session 4 (Description = “Regular Monthly Actions on Machine 1”). Click the “edit” link.
- Click the “Edit Source” link on the top panel.
- Scroll down to the “Add/ Edit Information” section and click the “Parts” tab.

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- On the “Enter part ID, brand, description or model” text field, start writing the brand of the part which we have set as “Special Brand”. The field will dynamically show you the available options. Select the “Special Brand” item.
- On section “3: This work order will affect...” enter 2 and click the “Add to Usage List” button. Your selection will transfer to section “4: Parts Usage List”.
- Click on the “Tasks” tab and enter “Tutorial” on the “Import Task List” text field. The list will auto populate. Select the “Tutorial Task List” and click the “Add” button. The task list contents will load onto the list below.
- Click the Tools tab. You will need to enter the tool ID you got on step 1 above on the “Import Tool” text field.
- Select the tool from the option list that loads and click “Add”.
- The imported quantity will show “0” because this is a recommendation, not actual usage (remember: this is a maintenance plan source work order, not a regular work order).
- Click the “Save” button at the bottom of the page to make all changes permanent.
- Click the “View order” link so you can confirm your changes (this is just a confirmation step you would not normally take).

## 3. Confirm your Changes

- Scroll down to the “View Information” Section and click the “Parts” tab.
- See the part you have added to the work order with an asterisk on the approval column. The asterisk indicates it is only a recommendation and no stock movement has been performed.
- Click the “Tasks” tab. The job steps are listed in there along with the standard duration.
- Click the “Tools” tab. You can see the required tool has been recommended.

Work orders with all the information you added will now be issued automatically by the system depending on your maintenance plan scheduling options.

## 4. Some Comments

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- Equipment, tools and task lists are added to regular work orders in exactly the same way you did above but they will not be set as “recommendations”.
- For example, if you add a part currently set to “in storage” to a regular work order, that part will be deducted from stock and its current “installed” location will be inferred from the work order Target Functional Location.
- The parts movement recorded on regular work orders, needs to be approved. Your dashboard contains a quick link at the top right labeled “Pending”. If you click that link, you are shown a list with items currently waiting for movement approval.
- The procedures described on this session allow for:
  - a log of past and current positions for your equipment,
  - a log of past and current utilization for your tools and
  - a log of the time it takes to perform jobs per Functional Location.

## Status after Session 8

You are well on your way to becoming a comma CMMS power user. Hopefully, the advanced possibilities of comma CMMS (even though you may not currently have the need for all of them) have become obvious.

## Coming Next

Reports and Statistics

Unique solution ID: #1036

Author: commacmms

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