Equipment Types

🛗 Wed, Jan 17, 2024 🛛 🖿 Equipment and Services

Equipment Types are used to represent the types of equipment that relate to the Sub Work Order Type they exist under. Sub Equipment Types are used to represent the different components under an Equipment Type. For example: the Equipment Type could be Escalator where the Sub Equipment Type could be the Emergency Stop Button.

1. The first step is to select the Client that will be used. For information on how to do this, see the Client Selection page.

2. This is the "Equipment/Service Types" screen. A list of all the items against the selected Client is shown. It is possible to tick and un-tick Equipment/Service types to determine whether it can used throughout the system. A summary of the selected item is displayed on the right.



3. Click on "Add" to add an Equipment/Service Type. Choose whether to add an "Equipment Type" or a "Service Type" under the currently selected WO Type. If an Equipment or Service is currently selected then the options to add either "Sub Equipment" or "Sub Service" will appear.

Sub Equipment under 'Bakery Oven'
Equipment under 'Bakery Ovens'
Service under 'Bakery Ovens'
Work Order Type

4. This is the Add Equipment Type screen that appears after choosing to add an Equipment Type. Each of the fields require different pieces of information to be entered. The fields are explained below:

Powred by PHPKB (Knowledge Base Software)

Add Equipment							
Name		Certificates	Click here to make a selection				
Cost Code							
Sub Cost Code							
Is Supported?	V	Reasons	Click here to make a selection				
Non-Supported Reason							
Is Meter?							
Unit of Measurement		Symptoms	Click here to make a selection				
			T				
Asset Tagging Required?		Part Types	Click here to make a selection				
Is FGas?							
Allow Asset Systems?		Karanada					
Revenue Only?		Keywords					
Work Order Types	Quote, Reactive						
			OK Cancel				
			on concer				

Name is a freeform field to enter the name of the Equipment Type.

Cost Code is a freeform field to enter the Cost Code this Equipment Type will be associated with. This and the Sub Cost Code field are permission based.

Sub Cost Code is a freeform field to enter the Sub Cost Code this Equipment Type will be associated with. This and the Cost Code field are permission based.

Is Supported? is a tick box. If this box is un-ticked then the User is stating that this item is not supported and that a Non-Supported Reason needs to be given. This is so that if a Work Order is logged against this type, whoever is logging it is told that Work Orders cannot be raised against this type and that they must raise it in a different manner, such as contacting their IT department. These details go in the Non-Supported Reason.

Non-Supported Reason is a freeform field. This is where the reason why the Equipment type isn't supported is entered.

Is Meter? is a tick box to determine whether the Equipment Type is a Meter.

Unit of Measurement is a pop up screen where the Measurement Units of the Equipment Type are selected. This screen is only available if the "Is Meter?" tick box is selected.

Asset Tagging Required? Tick this field if Asset Tagging is required for this particular Equipment Type.

Is FGas? is a tick box to determine whether the Equipment Type is FGas.

Allow Asset Systems? is a tick box to determine whether Equipment Type will be available for Asset System.

Revenue Only? is a tick box to determine whether the Equipment Type can have a Capital Project Budget Code associated to a Work Order. If an Equipment Type is marked as

Powred by PHPKB (Knowledge Base Software)

Revenue Only then Work Orders with this Equipment Type cannot be capitalised.

Work Order Types is a pop up screen where the Work Order Types, that the Equipment Type will be associated with, are chosen.

Certificates is a pop up screen. This is where the Certificates that relate to the Equipment Type are chosen.

Reasons is a pop up screen. The Reasons as to why the issue occurred are chosen in this screen. Misuse and Abuse/Accidental Damage is selected by default and cannot be removed.

Symptoms is a pop up screen where the Symptoms (ways to describe the issue) for the Equipment Type are selected.

Part Types is a pop up screen where the Part Types for the Equipment Type are chosen. Part Types only apply to Equipment items, not Service items.

Keywords is a freeform field. Entering Keywords enables the Equipment Type to appear in a search if the specific Keywords are searched for.

5. Once all the necessary information has been entered, click the "Save" button. The new Equipment Type will be shown in the list under the chosen Sub Work Order Type.
Note: When creating a Sub Equipment/Service Type, only the Name, Description, Cost Codes, Symptoms, Part Types and Keywords can be modified. Everything is inherited from the parent type.

Note: When editing an Equipment type there is an additional "image" button (screenshot below) which allows a picture to be stored against that equipment type. This is uploaded in the same way as <u>uploading a document</u>. This picture is displayed to Portal Users when creating a Reactive Work Order in the Web Portal.

Edit Equipment						
Name	Bottle Cabinet	Certificates	Click here to make a selection			
Cost Code						
Sub Cost Code						
Is Supported?		Reasons	Accidental Damage, Wear and Tear Breakdown			
Non-Supported Reason						
ls Meter?						
Unit of Measurement		Symptoms	Damaged			
		Dent Turner				
Asset Tagging Required?		Part types	Click here to make a selection			
ls FGas?						
Allow Asset Systems?		Keywords				
Revenue Only?						
Work Order Types	Quote, Reactive					
	₹		Image			
			OK Cancel			

Powred by PHPKB (Knowledge Base Software)

Once a new Equipment/Service Type has been created, please ensure to then follow the necessary steps to add that Equipment/Service Type to any relevant SRAs and Contracts.

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=70