ASSETWORKS, INC.

Standard Operating Procedure

Florida Agricultural & Mechanical University

DRAFT 15/03/2013

This Standard Operating Procedure (SOP) is a document prepared from a survey of best practices.

Table of Contents

Standard Operating Procedure

This Standard Operating Procedure (SOP) document is an overview of the Basic setup and operation of AiM™. The SOP contains an overview in the following areas:

- Business Processes
- Systems Configuration
- Data Setup
- System Operation

Business Process

The Business Process is derived from Organizational hierarchy, Property hierarchy, and the work order process for the Basic system setup. The organizational hierarchy accounts for who is doing the work and who the customer is. The property hierarchy indicates the location of the work. The work order process is the process is how the work is managed and completed.

Organization Structure: (Sample)
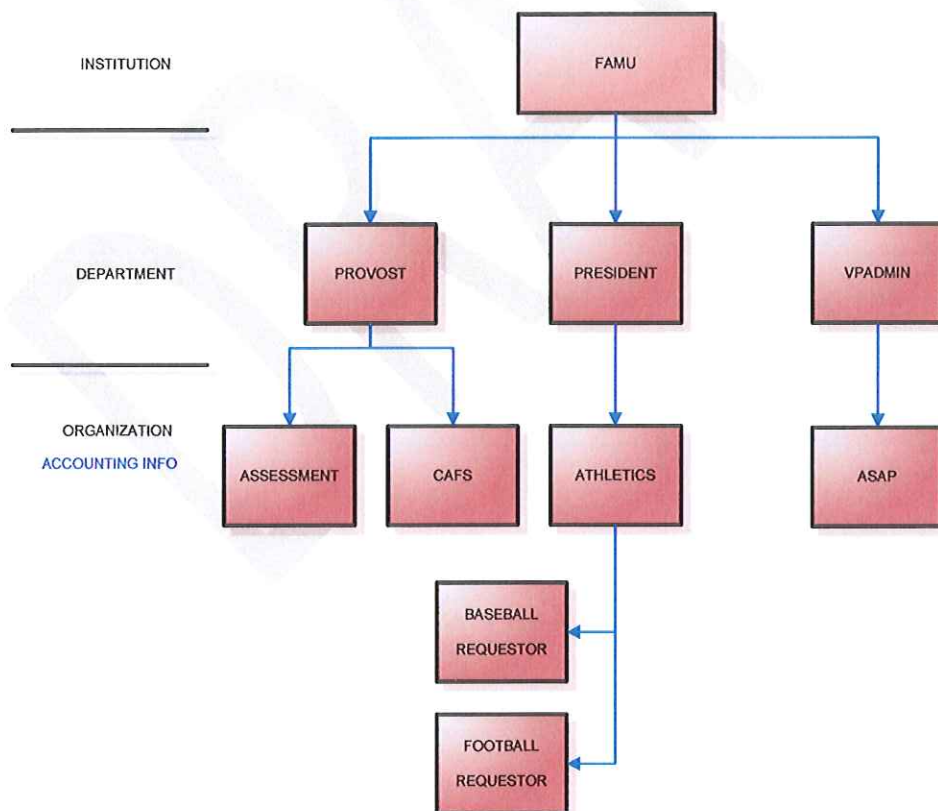
Work Flows: POM Funded - PM

TYPE: POM Funded
CATEGORY: Preventive Maintenance

WORK ORDER STATUSES

OPEN
HOLD (Req. note log)
CANCELED
WORK IN PROGRESS
WORK COMPLETE
CLOSED

PM Coordinator(s)
Creates Preventive Maintenance setup in AiM.
Master Asset Profile
PM Standards
PM Templates
Generate PM work orders at a status of Open

Shop
Finds work, reviews work order
Assigns, schedules, or backlogs the work order

Shop Person
Receives work
Coordinate with supervisor
Do work or escort contractor as req
Record time, materials, comment, action taken

Shop Supervisor
Verifies work completion and time
Enters and Approves time daily in AiM

Account Coordinator
Close out work orders after 90 days

PHASE STATUSES

NEW
ASSIGN
SCHEDULE
BACKLOG
WORK IN PROGRESS
HOLD (Req. note log)
HOLD FOR CUSTOMER
(Req. note log)
HOLD FOR MATERIALS
(Req. note log)
WORK COMPLETE
CANCELED
CLOSED
REOPEN
CALL BACK

CLOSED

CLOSED

CLOSED

POM Funded, Preventive Maintenance: Roles and Responsibilities

PM Coordinator

Creates Preventive Maintenance setup in AiM

       Master Asset Profile

       PM Standards

       PM Templates

Generate PM work orders at a status of Open

Shop Supervisor

Reviews/discriminates work order, Assigns, Schedules, or backlogs the work order

Shop Person

Receives work assignment and coordinate with supervisor as appropriate. Completes work or escorts contractor as required, record time, materials, comment, action taken

Shop Supervisor

Verifies work completion, validates time. Approves time daily in AiM

Account Coordinator

Closes out work order

Work Flows: POM Funded - PMI

TYPE: POM Funded
CATEGORY: Preventive Maintenance Inspection

WORK ORDER STATUSES

OPEN
HOLD (Req. note log)
CANCELED
WORK IN PROGRESS
WORK COMPLETE
CLOSED

PHASE STATUSES

NEW
ASSIGN
SCHEDULE
BACKLOG
WORK IN PROGRESS
HOLD (Req. note log)
HOLD FOR CUSTOMER
(Req. note log)
HOLD FOR MATERIALS
(Req. note log)
WORK COMPLETE
CANCELED
CLOSED
REOPEN
CALL BACK

PM Coordinator(s)
Creates Preventive Maintenance setup in AiM.
Master Asset Profile
PM Standards
PM Templates
Generate PM work orders at a status of Open

Shop
Finds work,
Schedules work
Creates additional phases as appropriate
Assign for execution at appropriate date

Shop Person
Schedule work, materials as required
Coordinate with supervisor or coordinator as appropriate
Do work
Record time, materials, comment, action taken

Shop Supervisor
Verifies work completion and time
Enters and Approves time daily in AiM

Account Coordinator
Close out work orders

CLOSED

CLOSED

POM Funded, Preventive Maintenance Inspection: Roles and Responsibilities

PM Coordinator
Creates Preventive Maintenance setup in AiM
> *Master Asset Profile*
> *PM Standards*
> *PM Templates*

Generate PM work orders at a status of Open

Shop Supervisor
Reviews/Finds work, Schedule work, Creates additional phases as appropriate. Assign for execution at appropriate date.
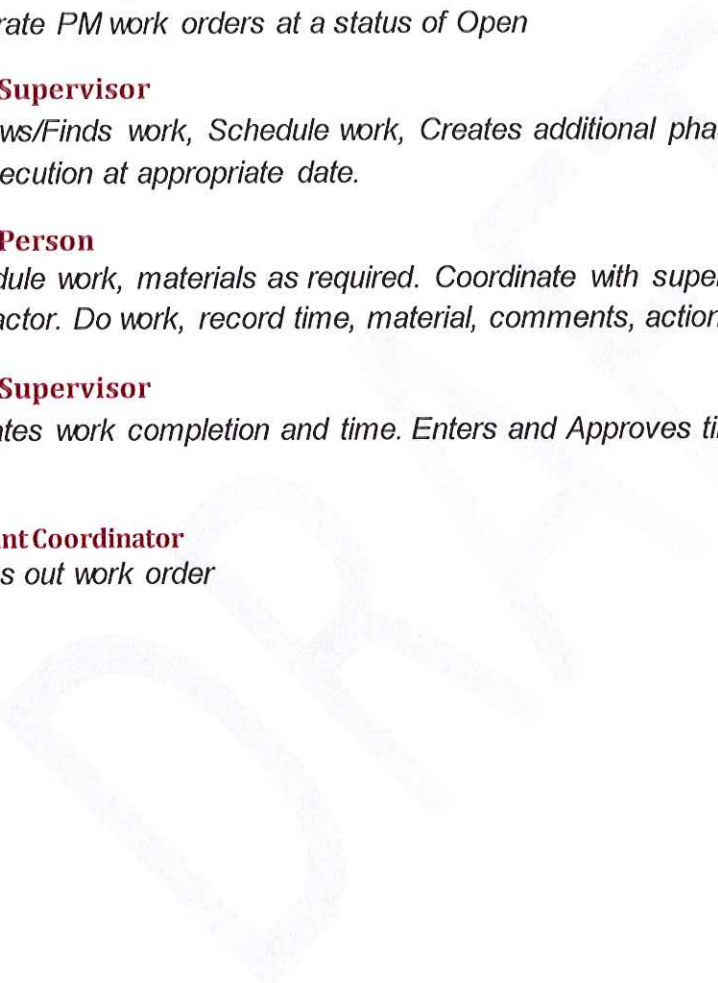
Shop Person
Schedule work, materials as required. Coordinate with supervisor or appropriate contractor. Do work, record time, material, comments, actions taken.

Shop Supervisor
Validates work completion and time. Enters and Approves time daily in AiM.

.

Account Coordinator
Closes out work order

Work Flows: POM Funded - PMR

TYPE: POM Funded
CATEGORY: Preventive Maintenance Repair

WORK ORDER STATUSES

PHASE STATUSES

OPEN
HOLD (Req. note log)
CANCELED
WORK IN PROGRESS
WORK COMPLETE
CLOSED

PM Coordinator(s)

Creates Preventive Maintenance setup in AiM.
Master Asset Profile
PM Standards
PM Templates
Generate PM work orders at a status of Open

Shop

Finds work,
Schedules work
Creates additional phases as appropriate
Assign for execution at appropriate date

Shop Person

Schedule work, materials as required
Coordinate with supervisor or coordinator as appropriate
Do work
Record time, materials, comment, action taken

Shop Supervisor

Verifies work completion and time
Enters and Approves time daily in AiM

Account Coordinator

Close out work orders

NEW
ASSIGN
SCHEDULE
BACKLOG
WORK IN PROGRESS
HOLD (Req. note log)
HOLD FOR CUSTOMER
(Req. note log)
HOLD FOR MATERIALS
(Req. note log)
WORK COMPLETE
CANCELED
CLOSED
REOPEN
CALL BACK

CLOSED

CLOSED

POM Funded, Preventive Maintenance Repair: Roles and Responsibilities

PM Coordinator
Creates Preventive Maintenance setup in AiM
> *Master Asset Profile*
> *PM Standards*
> *PM Templates*
Generate PM work orders at a status of Open

Shop Supervisor
Reviews/Finds work, Schedule work, Creates additional phases as appropriate. Assign for execution at appropriate date.

Shop Person
Schedule work, materials as required. Coordinate with supervisor or appropriate contractor. Do work, record time, material, comments, actions taken.

Shop Supervisor
Validates work completion and time. Enters and Approves time daily in AiM.

Account Coordinator
Closes out work order

Inventory

The Inventory module is used to define and classify inventory parts. It maintains characteristics – such as location, average cost, quantity on hand, quantity committed, and vendors – all becoming part of its inventory part record. Warehouses and warehouse bin definitions in the system are created through the Inventory module. Inventory part quantities are updated and adjusted here as well. All information will be entered once, and it will be used everywhere in AiM™ with the appropriate security settings.

Preventive Maintenance

The Preventive Maintenance module manages all PM and inspection work that can be set up on a scheduled basis using templates. The system will automatically generate the Work Orders based on the criteria in the template. This functionality requires the use of defined assets, which can be a single equipment item or a group of assets. These items are defined on the Asset Profile screen.

Project Management

AiM™ facilitates the management of a project as a group of work orders. Projects must be set up first before any Work Orders can be associated to them. The project will have its own statuses to track the project milestones. Costs roll up into the project from the Work Orders for reporting purposes. Projects can be further grouped on this screen to report them together.

Property

The Property module allows the user to establish properties and the locations within properties. Properties are placed in the location hierarchy and associated to regions and facilities. In addition to a description and classification of the property, the Property/Locations screen allows entry of an address for the property, which is often a building. Locations, the most specific level of the location hierarchy, often represent rooms within the property. A property must have at least one location. Locations may have unique descriptions and statuses independent of the property description and status.

Purchasing

This module manages purchase order processing, vendor catalogs, and associated disbursement processes.

Time Management

The Time Management module maintains detailed records that support labor tracking for both work performed and leave time. Timecards can be created to collect labor hours, both in-house and contracted, to collect billable vs. regular hours, and to collect leave of various kinds. Timecard approval privileges need to be granted to users before they can approve a timecard. After a timecard is approved, which posts the time to the database, an adjustment screen is available for authorized users if changes to the posted time are required. The Time Management module also provides a convenient way to generate a large number of timecards using the Timecard Generator.