

Ostendo

And

Freeway

Servicing of Multiple

Customer Assets

(Update 233 and later)

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Servicing Customer Assets (without using a planned service schedule)

Method 1 - Overview:

This style of servicing is suited to situations where you require service personnel to visit a customers site in order to service some or all assets held there. The purpose of this style of servicing is where you wish to record Service Maintenance of one or more assets when you are conducting work at a customers site. Unlike a Planned service event, this type of servicing allows a tech to create a simple job or select an existing job for the Customer and then select each Asset individually as he services it from a Freeway Mobility Checklist. This style of servicing requires jobs that must be setup as Non Asset.

Initially, all assets for that customer are presented to the Freeway user, then as each asset is serviced, they are removed from the asset list within Freeway. This means the Asset list presented in Freeway is only showing assets not yet serviced in that visit. In this scenario, you only need to select the assets that were actually serviced.

This style of servicing is suited to maintenance requirements where costs of time and materials do not need to be attributed back to specific assets but a simple service history needs to be maintained by asset.

Example:

In this scenario, we will configure Ostendo and Freeway to allow for the servicing of Air Conditioning units. Each unit comprises of an Indoor Unit along with an Outdoor Unit. Both types of units require different checks and requirements, therefore we will control the checklists presented to the user based on the 'Service Type' of Unit being serviced.

Setup:

Service Types:

These are optional conditioning and grouping mechanisms that allow you to control what assets are included in the Customer Asset List in Freeway along with the sequence they are presented to you. They can also control the specific checklist presented to the user for the selected Asset. In this case we will use the following Service Types: Indoor Unit and Outdoor Unit. Service Types are setup from Service -> Settings -> Customer Asset Service Types

1. Ensure each Asset has the appropriate Service Type linked to it. Also because this style of servicing is more 'ad-hoc' you do not need to set an service schedule behind each Asset.

The screenshot shows the 'Asset Detail' form for an 'Indoor - (233344)' asset. The form is organized into several sections: 'Asset Name' (Indoor - (233344)), 'Status' (Active), 'Description' (Indoor Air Conditioning Unit (233344)), 'Asset Number', 'Asset Type', 'Customer' (Green Enterprises), 'Asset Tracking Information' (Asset currently at: Customer Site), 'Asset Origination' (From: Manual, Source Reference, Creation Date: 7/05/2018), 'Asset Readings' (Primary Reading Name), 'Warranty Info' (Warranty Expiry: N/A, Warranty Status), 'Customer Specific Information' (Location at Customer Site, Service Zone, Customer requires confirmation of planned servicing, Days notice required: 30, Reminder Style, Reminder Contact, Confirmation Text), 'Additional Fields', 'Linked Company Asset' (Asset Style: Customer, Company Asset), and 'Linked Service Type' (Service Type: Indoor Unit, Group Service Asset). The 'Linked Service Type' section is highlighted in yellow.

2. Create a Checklist for Indoor Units

The screenshot shows the 'Check Lists' form. The form has tabs for 'List', 'Detail', 'Groups', 'Items', and 'Conditional Rules'. The 'List' tab is selected. The form contains fields for 'Name' (Indoor Air Con Checklist), 'Description' (Indoor Air Con Checklist), and 'List or Form' (List).

Check Lists		
List	Detail	Groups
Checklist: Indoor Air Con Checklist		
Groups Seq	Group Name	Mandatory Style
10	Indoor Unit Checks	Optional

Check Lists						
List	Detail	Groups	Items	Conditional Rules		
Checklist: Indoor Air Con Checklist						
Group Name	Group Seq	Item Seq	Variable Name	Description	Type	Lis
Indoor Unit Checks	10	5		Select Indoor Unit	AssetList	
Indoor Unit Checks	10	10		Check & Clean Filters	CheckBox	
Indoor Unit Checks	10	20		Check all electrical components	CheckBox	

NB: Ensure the Checklist entry for the Type 'AssetList' is the first entry in the checklist, otherwise the Asset selected will be treated simply as a Reference in the Checklist.

- On the Checklist screen you will see at the bottom, an entry for 'Service Type'. This is where we link this and potentially any other service types to this checklist. This will only display Assets that are setup with this Service Type. If multiple Service Types are specified, the Asset List will be sorted by default into Asset Type-Service Type-Asset Name sequence.

Check Lists	
List	Detail
Checklist: Indoor Air Con Checklist	
Group Name	Group
Indoor Unit Checks	
Indoor Unit Checks	
Indoor Unit Checks	

Service Type
Indoor Unit

Ensure you are positioned on the Checklist Line record that has the 'AssetList' type specified. Click in the bottom area of this Checklist screen and press the Add Button to add a Service Type conditioning entry to this Checklist.

- Repeat this same process when constructing the Checklist for Outdoor Units.

Group Name	Group Seq	Item Seq	Variable Name	Description	Type
Outdoor Checks	10	5		Select Outdoor Unit	AssetList
Outdoor Checks	10	10		Check for corrosion	CheckBox
Outdoor Checks	10	20		Check electrical components etc.	CheckBox

Service Type
 Outdoor Unit

- Create a Freeway Style Template. In this case we have created a specific one for an Air Con Service.

When creating the Style Template ensure the 'Creation Style when selecting a Job' is set to 'Update Order' otherwise the template will not be available to the Freeway user.

If you are allowing the user to create a new job on the fly you would typically set 'Creation Style when Selecting Customer' to 'New Actual or New Direct Invoice'.

Style Templates

List Detail **Template** Settings

Name	Description	Template Group
Air Con Service	Air Conditioning Service (Indoor / Outdoor)	

Creation Style when Selecting Customer: **New Direct Invoice**
 Creation Style when selecting Supplier: N/A
 Creation Style when selecting Job: **Update Order**
 Creation Style when selecting Assembly: N/A
 Creation Style when selecting Delivery: N/A
 Creation Style when selecting Purchase: N/A
 Creation Style when selecting Count: N/A
 Creation Style when selecting Internal: N/A

Set Copy to Invoice for Linked Job Data Sheet Creation: Material Lookup Style: Standard

Job Type for New Job Order: Job Type for New Job with Customer Asset: Style Image:

Purchase Type for New Purchase Order: Sales Type for New Sales Order:

How Material Quantities are Posted: Quantities UnChanged Time Tracking is Active if Auto On and Off Site for Start/Stop Times is set:

No Auto Post:

- From the Style Template- Templates Tab add the relevant entries being sure to include 'Register' entries for both the Indoor and Outdoor Checklists

Style Templates

List Detail **Template** Settings

Sequence	Type	Description	Option	Display
10	REGISTER	Indoor Air Con Checklist	Indoor Air Con Checklist	Always
20	REGISTER	Outdoor Air Con Checklist	Outdoor Air Con Checklist	Always
30	TIMES	Employee Times		Always
40	MATERIALS	Materials and Charges		Always

- To make this Style Template available to the Freeway users, you must now specify the Style Template for that user in the Style Template Matrix

Style Template Matrix

Data Sheet Style	Job Type	Customer Type	Customer	Supplier Type	Supplier	Employee	Style Name
Job						Service	General Repair
Job						Service	Record Downtime
All						Service	Create New Job Order
All						Service	Asset Service
All						Service	QA
All						Service	Air Con Service
Job						Service	Lock Install
All						Service	Coy Asset Service

- From the Employee Mobility Settings screen, go to the Customers Tab and ensure Customer Asset Selection is ticked.

Inherit Mobility Settings from another Employee

Level of Information Displayed: Standard

Device Materials Time Entry **Customers** Jobs Suppliers Assemblies Deliveries Purchases Counts Assignment Move

Customer Restriction Condition

Customer Asset Selection

Customer Asset Restriction Condition

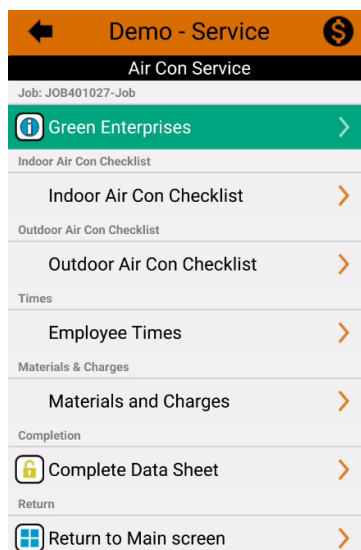
- Ensure the Freeway user performs a full Re-initialisation to copy down the new template to their device.

Note:

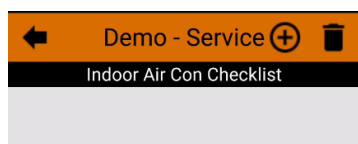
The Asset Selection is always based on the Customer, therefore you must have already selected the Customer or a Job within Freeway before you can access an Asset List.

Recording Asset Checklist information in Freeway:

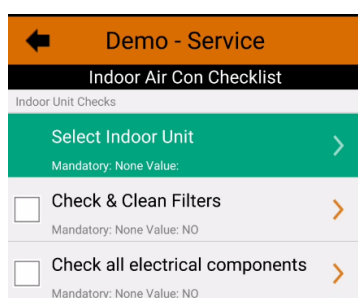
1. Select the job from the jobs list within Freeway to create a Datasheet
2. As the Service personnel identifies the unit they are carrying out work on, they select that unit from the appropriate Checklist. In this case we will be servicing an Indoor Unit Serial # 86454, so the Service person would select the 'Indoor Unit Checklist' to find that specific unit.



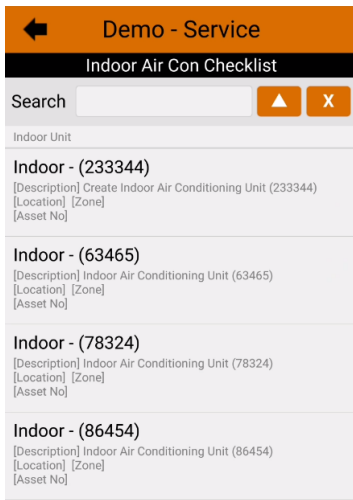
3. Press the '+' button to add a register entry for the appropriate unit.



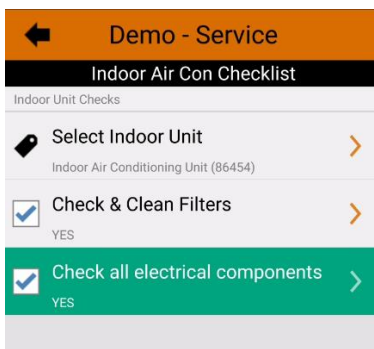
4. Select the unit from the Indoor Unit List



Notice, only Indoor units have been presented as this list has been conditioned based on the Service Type of 'Indoor Unit' setup against the Asset



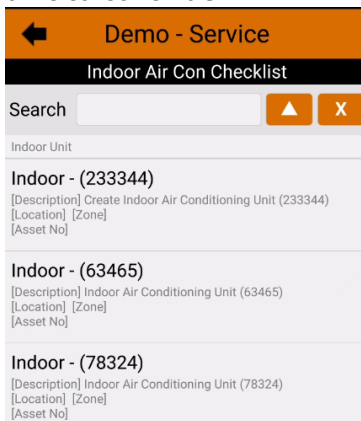
5. The unit is now ready for recording your Checklist entries.



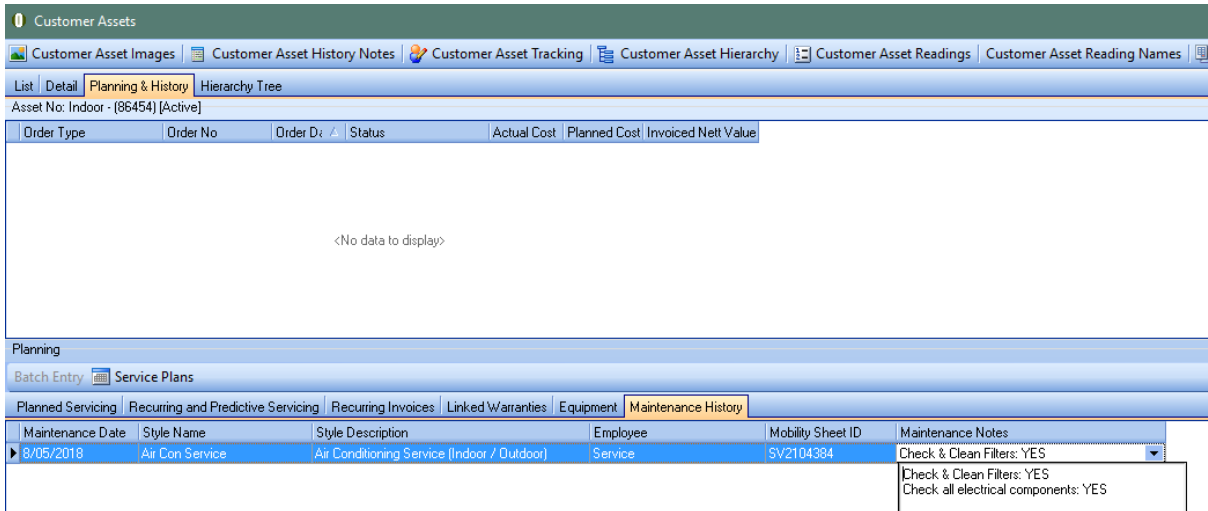
6. Once completed, press the Go Back button to return to the main Register screen, ready to select another Unit.



Notice now, that the previously selected unit no longer appears. Select the next unit to continue



Once the Datasheet has been completed and returned to Ostendo, any assets that were selected via Freeway will have their associated 'Maintenance History' updated with the relevant Checklist details recorded in the Maintenance Notes field.

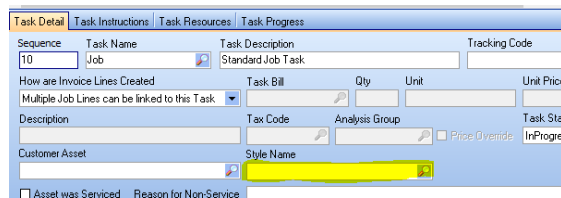


Note:
Defaulting Mobility Style Templates:

A Style template can be manually selected from within Freeway, or alternatively can be pre-set against the following to automate the Style Template selection process. Freeway determines the Style template by evaluating if a style template name exists at the following levels

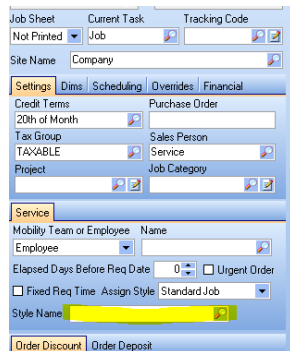
Job Task

Freeway will use this Style Name if it exists on the job in this field, otherwise..



Job Header

Freeway will use this Style Name if it exists in this field on the job, otherwise...



Task Name.

Freeway will use Style Name on the 'Task' if the Style Name does not exist in this field of the Task of the Job, otherwise...

Task Name	Description	Department	Task Status	Default Mobility Template	No Scheduling
Account/Travel	Accommodation / Travel		Active		<input type="checkbox"/>
Additional Work	Additional Work		Active		<input type="checkbox"/>
Antivirus/Install	Install Antivirus on PC	Service	Active		<input type="checkbox"/>
Assembly/Kitset	Assembly / Kitset	Production	Active		<input type="checkbox"/>
Backup/Restore	Test the Backup & Restore	Service	Active		<input type="checkbox"/>
CNC	CNC	Production	Active		<input type="checkbox"/>
Commission	Commission		Active		<input type="checkbox"/>
Concrete	Concrete		Active		<input type="checkbox"/>
Consumables	Consumables		Active		<input type="checkbox"/>
Downtime	Downtime		Active		<input type="checkbox"/>
Electric Mat	Electric Mat		Active		<input type="checkbox"/>
Electrical	Electrical		Active		<input type="checkbox"/>

NB: A style name specified on a Job Template Task will be copied through to the Job Task

Task Information

Sequence	Task Name	Description	Job Lines
10	Labour	Labour	A Single T
20	Materials	Materials	A Single T
30	Mileage	Mileage	A Single T

Task Detail

Sequence: 10, Task Name: Labour, Task Description: Labour

How are Invoice Lines Created: A Single Task Bill is Linked to this Task, Task Bill Code: LABOURTB

Description: Labour

Dynamically Create Tasks for Customer Assets when Template is Linked to a Group Se

Service Type to Condition Assets: Style Name

Job Type

Freeway will use this Style Name if it exists in this field, otherwise it will ask the Freeway user to select the appropriate Style Template

Hint	No WIP	Hazard Group	Style Name	Status
	<input type="checkbox"/>			Active
	<input type="checkbox"/>			Active
	<input type="checkbox"/>			Active
	<input type="checkbox"/>			Active
	<input type="checkbox"/>			Active
	<input type="checkbox"/>			Active
	<input type="checkbox"/>			Active

Servicing Customer Assets (Using a planned service schedule)

Method 2 - Overview:

This style of Servicing extends the capability of Servicing Assets from Method 1 by scheduling the periodic servicing based on a 'Site' Asset. An example of this is where you wish to maintain multiple assets located at a Customers site. Apart from the initial creation of the actual assets as previously described in **'Method 1'**. We only need to create a single Customer Asset record representing the customers 'Site' and then setup the planned scheduling event behind this. Typically, this will be a 'timed recurring or Service Plan' event eg: monthly, 6 monthly etc..

This way a job is created based on the service schedule for the 'Site' asset and then deployed to the Freeway user ready for them to service the assets as described in **'Method 1'**

Like Method 1, this style of servicing is suited to maintenance requirements where costs do not need to be attributed back to specific assets, but the maintenance history needs to be maintained by asset.

The site asset must be linked to a Job Type where the Job Style is set to 'Customer Asset'. The Individual assets do not need a service schedule of their own in this scenario, as they are being serviced on a timed basis from the 'Site' Asset.

Use this servicing style when you require a scheduled (Planned) service visit to a customer's site and also require basic service maintenance history of assets, but when the customer only needs an invoice for the total time and materials used on that visit thereby not needing to be attributed back to any specific assets.

Example:

Using the same assets from the previous sections example, we will schedule the maintenance of these Indoor and Outdoor Units to be maintained on a service schedule of once every 6mths.

Setup:

- Create a Customer Asset, naming it the Site address linking it to the same customer all the units are linked to. Ie: in this example = Green Enterprises

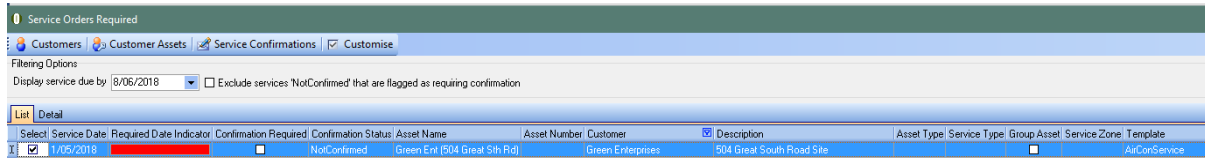
- Setup a Service Schedule from the Planning & History tab of the Asset. In this case it will be a Recurring schedule set for every 6 mths.

Recurring Style	Day of Month	Fixed Day Number	Frequency Period	Recurring Frequency	Predictive Style	Nearest Working Day	Reading Name	Reading Cycle	Job Type	Template	Last Event Date
Frequency	None		Months	6	No Predictive Ev...	<input type="checkbox"/>			Mthly Service	AirConService	1/11/2017

Notice now the by setting this event in this way we now have a servicing requirement set for 1/5/18 as the last recorded service event was on 1/11/17

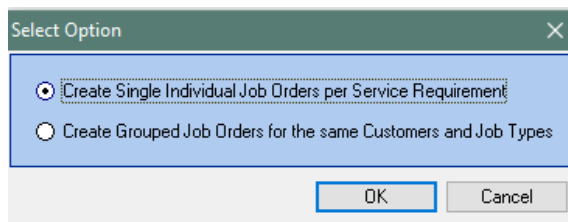
Planned Date	Job Type	Template	Confirmation Status	Reminder Sent	Reminder Date	Reminder Contact	Confirmed Date
1/05/2018	Mthly Service	AirConService	NotConfirmed	<input type="checkbox"/>			1/05/2018

- Now run the Service Order Required screen to see what up and coming service maintenance is required for assets. This screen will now show one asset being the 'Site'. This will then be generated into a job allowing the servicing of specific assets.

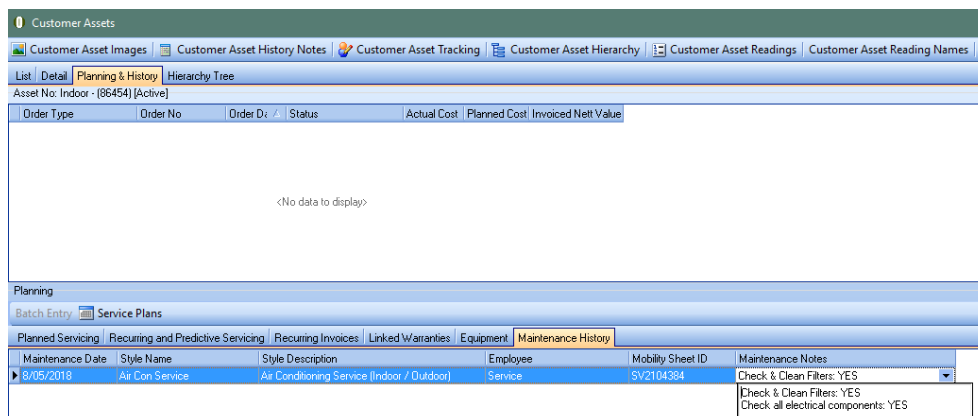


NB: The Service Date Horizon, (Service Rules) can be automatically set to be so many days forward of today. This allows you to set a default horizon for all servicing requirements. An example of this would, be to set this number of days horizon to 30. Then the Service Orders Required screen would only show servicing requirements up to 30 days from today.

- By now selecting this service requirement and pressing the 'Generate Job Orders for Required Services' button you are able to create a job from this requirement. You will be presented with an options screen, which you should select the '**Create Single Individual Job Orders per Service Requirement**' option. *The Grouping option will be described in the next section of this document.*



- You will now have one job in your jobs list reflecting the Planned service requirement for the 'Site' asset
- Deploy this job to the Freeway User and they will record their servicing results against the relevant checklists for all Indoor and Outdoor units for this site as described in '**Method 1**'.
- When the job as a whole has been completed and returned to Ostendo, each Indoor / Outdoor assets maintenance record is updated

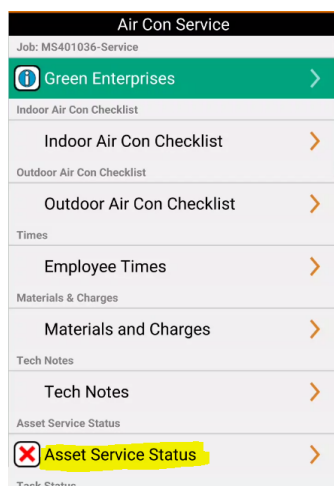


- Before any future Service Events are triggered for an Asset on a job, Ostendo checks the job header to see if the Asset was flagged as 'Not Serviced'. This flag controls whether a new service event should be created, or to leave the current service event intact if that Asset was not serviced. (Remember in this case where we are referring to the Asset as a Site). Therefore, if the service person could not start the job (therefore unable to service any Assets) for that site at all, they would indicate this via Datasheet entry in Freeway that the Asset (Site) was not able to be serviced. This would mean that the back-office staff would close the job, thereby leaving the Site Asset Planned Service Schedule intact, ready to generate a new job at a later point in time.

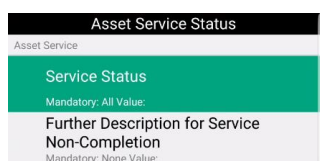
How Does the Freeway User Update This?

- On your Mobility Style Template ensure you have 'ASSETSERVICESTATUS' specified as a Template type. This will present the Freeway user a Mandatory Datasheet option to indicate whether the Asset was Serviced or not.

Sequent	Type	Description	Option
10	REGISTER	Indoor Air Con Checklist	Indoor Air Con Checklist
20	REGISTER	Outdoor Air Con Checklist	Outdoor Air Con Checklist
30	TIMES	Employee Times	
40	MATERIALS	Materials and Charges	
50	NOTE	Tech Notes	Tech Notes
60	ASSETSERVICESTATUS	Asset Service Status	
70	TASKSTATUS	Task Status	



- When this option is taken, the following screen will be displayed



- Select the appropriate Service Status option from a predefined List in Freeway. (List entries cannot be changed)

Service Completed	<input type="radio"/>
Service Not Completed - Asset InUse	<input type="radio"/>
Service Not Completed - Asset Not Found	<input type="radio"/>
Service Not Completed - Asset in Repair	<input type="radio"/>
Service Not Completed - Other	<input type="radio"/>

- Once you have selected this option you may enter an optional description in the next option.

Asset Service Status

Asset Service

Service Status

[Mandatory] Service Not Completed - Other

Further Description for Service Non-Completion

Mandatory: None Value:

Asset Service Status

Further Description for Service Non-Com...

Could not gain access to the unit

- As this job is for a single Asset (In this case the Site), once the Datasheet is completed, the appropriate flag and message on the Job Header are Updated.

Service **Asset** Tracking Readings

Customer Asset Green Ent (504 Great Sth Rd)

504 Great South Road Site

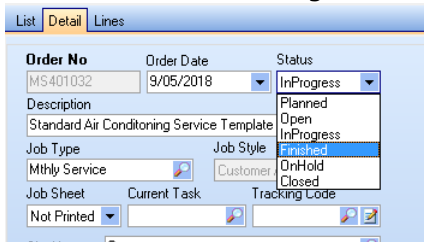
Asset was Not Serviced

Reason for Non-Service

Could not gain access to the unit

What triggers the next Service Event for an Asset?.

- The triggering of the next service event only occurs when either:
 - The Job Status is changed to Finished,



The 'Last Event Date' on the Asset will be updated with the system date. (In this case the system date is 9/5/18)

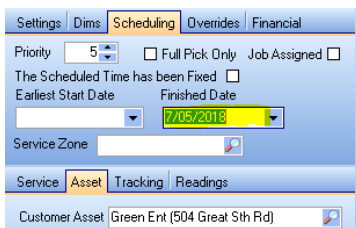
Planned Servicing	Recurring and Predictive Servicing	Recurring Invoices	Linked Warranties	Equipment	Maintenance History						
Recurring Style	Day of Month	Fixed Day Number	Frequency Period	Recurring Frequency	Predictive Style	Nearest Working Day	Reading Name	Reading Cycle	Job Type	Template	Last Event Date
Frequency	None		Months		6 No Predictive Ev...				Mthly Service	AirConService	9/05/2018

Then the next planned service date will be determined from that point.

Planned Date	Job Type	Template	Confirmation Status	Reminder Sent	Re...
9/11/2018	Mthly Service	AirConService	NotConfirmed	<input type="checkbox"/>	

Or

- The Job scheduling 'Finished Date' is manually updated with the actual service date. (In this case the user has entered 7/5/18). This is useful when back office staff are retrospectively entering the finished date where that finished date has not been recorded by the Freeway user.



That date will then update the Last Event Date on the Asset

Planned Servicing	Recurring and Predictive Servicing	Recurring Invoices	Linked Warranties	Equipment	Maintenance History						
Recurring Style	Day of Month	Fixed Day Number	Frequency Period	Recurring Frequency	Predictive Style	Nearest Working Day	Reading Name	Reading Cycle	Job Type	Template	Last Event Date
Frequency	None		Months		6 No Predictive Ev...				Mthly Service	AirConService	7/05/2018

Then the next planned service date will be determined from that point.

Planned Date	Job Type	Template	Confirmation Status	Remin
7/11/2018	Mthly Service	AirConService	NotConfirmed	

How can the Freeway User Influence the 'Finished' Date?

- On your Mobility Style Template ensure you have 'TASKSTATUS' specified as a Template type. This will present the Freeway user with an option to flag the Job Task as 'Finished'. This triggers the Task Finished Date on the job to be recorded as the system date when the Datasheet was returned to Ostendo. From this, Ostendo will update the Last Event Date on the Asset and create a new Planned Service schedule.

Style Templates				
Sequence	Type	Description	Option	Display
10	REGISTER	Indoor Air Con Checklist	Indoor Air Con Checklist	Always
20	REGISTER	Outdoor Air Con Checklist	Outdoor Air Con Checklist	Always
30	TIMES	Employee Times		Always
40	MATERIALS	Materials and Charges		Always
50	NOTE	Tech Notes	Tech Notes	Always
60	ASSETSERVICESTATUS	Asset Service Status		Always
70	TASKSTATUS	Task Status		Always

- When this option is taken, the following Freeway screen will be presented. Ticking this box will ultimately change the Task to 'Finished' and trigger a new service plan for the asset only after the Datasheet has been completed and returned.

Planning											
Batch Entry Service Plans											
Planned Servicing Recurring and Predictive Servicing Recurring Invoices Linked Warranties Equipment Maintenance History											
Recurring Style	Day of Month	Fixed Day Number	Frequency Period	Recurring Frequency	Predictive Style	Nearest Working Day	Reading Name	Reading Cycle	Job Type	Template	Last Event Date
▶ Frequency	None		Months		6 No Predictive Ev...	<input type="checkbox"/>			Mthly Service	AirConService	10/05/2018

Customer Assets						
Customer Asset Images Customer Asset History Notes Customer Asset Tracking Customer						
List Detail Planning & History Hierarchy Tree						
Asset No: Green Ent (504 Great Stn Rd) [Active]						
Order Type	Order No	Order Date	Status	Actual Cost	Planned Cost	Invoice
Mthly Service	MS401032	1/05/2018	Closed	\$0.00	\$89.00	
▶ Mthly Service	MS401038	10/05/2018	Finished	\$0.00	\$89.00	

Planning					
Batch Entry Service Plans					
Planned Servicing Recurring and Predictive Servicing Recurring Invoices Linked Warranties Equipment Maintenance History					
Planned Date	Job Type	Template	Confirmation Status	Reminder Sent	Reminder
▶ 10/11/2018	Mthly Service	AirConService	NoConfirmed	<input type="checkbox"/>	

Asset Consolidation Onto One job

Method – 3 Overview:

This method allows manual grouping of service events for multiple Assets based on your selection from Service Order Required screen

This way of configuring servicing uses the planned service event from each individual asset and allows you to combine these assets together onto one job. In this process, each asset is linked to its own job task on the same job. Dynamic Job tasks are automatically created and used on the job to separate each asset.

Typical reasons for using servicing in this manner include:

- When the anniversary service event could be different for multiple assets for the same customer and where it makes sense to perform the maintenance in one visit.
- When you wish to align service event periods where they differ for assets, simply because those assets were purchased at different times or where assets were unable to be serviced from a previous visit.
- When you have high value assets and wish to attribute maintenance costs back to the specific asset.

The requirements to consolidate suggested asset servicing together as one job means that these assets must all share the same job type and job template in each Assets Planning tab.

Unlike Method 2 we do not use a Site Asset to control the servicing event. Instead, we use each of the Assets planned service schedule and then combine those assets into one job.

Example:

In this example we will schedule one service relating to 3 individual Forklifts. These forklifts are a combination of Diesel & LPG, therefore the checklists presented to the Freeway user could be different, based on which type of Forklift they are servicing. We will leave the selection of the appropriate checklist to the Freeway user in this case. However, if you wanted to force a specific checklist for a specific type of Forklift you could do either of the following to achieve this:

1. Create a conditional checklist which asks the Freeway user what type of Forklift they are working on. Then the conditional checklist can control the questions etc. within one checklist.
2. Link each Asset to a different Job Template so that when multiple assets are of the same type are selected for the customer, Ostendo will group them and create one job for each Job Template. Further to this you could specify the Style Name of the Mobility Style Template against the Job Template Task. When the job task is created on the generated job, that task will have the Style name copied

through. This way when the user selects the Asset in Freeway, it will automatically launch the appropriate Style Template for the Datasheet.

Setup:

- Setup the Assets and their associated planned service schedules as normal.

Planning

Batch Entry Service Plans

Planned Servicing Recurring and Predictive Servicing Recurring Invoices Linked Warranties Equipment Maintenance History

Planned Date	Job Type	Template	Confirmation Status	Reminder Sent	Reminder Date	Reminder Contact	Confirmed Date
24/04/2018	Recurring	6 Mth Service	NotConfirmed	<input type="checkbox"/>			24/04/2018

- Run the Suggested Service Orders Required screen to view up and coming service events for this customer.

Service Orders Required

Customers Customer Assets Service Confirmations Customise

Filtering Options

Display service due by 3/06/2018 Exclude services 'NotConfirmed' that are flagged as requiring confirmation

Select	Service Date	Required Date Indicator	Confirmation Required	Confirmation Status	Asset Name	Asset Number	Customer	Description	Asset Type	Service Type	Group Asset	Service Zone	Template
<input type="checkbox"/>	20/01/2018		<input type="checkbox"/>	NotConfirmed	Forklift (VC6524)		Jones Warehousing Solutions	Forklift Reg VC6524			<input type="checkbox"/>		6 Mth Service
<input type="checkbox"/>	20/04/2018		<input type="checkbox"/>	NotConfirmed	Forklift (LK435)		Jones Warehousing Solutions	Forklift Reg LK435			<input type="checkbox"/>		6 Mth Service
<input type="checkbox"/>	24/04/2018		<input type="checkbox"/>	NotConfirmed	Forklift (HG344)		Jones Warehousing Solutions	Forklift Reg HG344			<input type="checkbox"/>		6 Mth Service

- Select all assets requiring service and press the 'Generate Job Orders For Selected Services' button to create, in this case one combined job order as all these Asset are setup with the same Job Type & Template. Select the option to 'Create Grouped Job Orders for the same Customers and Job Types'

- This will create one job for all Assets within that share the same Job Type and Template

The screenshot shows the 'Job Orders' application window. The 'Order No' is REC401041, 'Order Date' is 10/05/2018, and 'Status' is Open. The 'Job Style' is highlighted as 'Customer'. The 'Customer' is Jones Warehousing Solutions. The 'Job Scheduling' section shows a 'Required Date' of 20/01/2018 and an 'Estimated Duration' of 0 minutes. The 'Job Values' section shows 'Invoice Style' as 'From Actual Entries' and 'Invoice Currency' as 'In'. A summary table at the bottom right shows 'Ordered Values' and 'Invoiced Values' for 'Nett', 'Tax', and 'Total'.

Notice that unlike the previous methods upon Job creation, Ostendo will automatically change the Job Style from 'Customer Asset' to 'Customer'. This is because jobs in Ostendo with multiple assets linked to tasks must have a Job style of 'Customer' despite them being generated from a Customer Asset.

You will also notice that this job now has 3 job tasks on it. Each Task is linked to a specific asset, and in this case linked to a relevant Style Name. These Tasks have been dynamically generated by Ostendo by using the first 16 characters of the Job Template Task and appending '_001' '_002' etc.. in order to make them unique to this job. As these tasks are changeable and are only generated by Ostendo automatically, Ostendo will flag their status as 'InActive' in the Task Master table so prevent users from selecting them in future.

The screenshot shows the 'Job Tasks' application window. It displays a table of tasks for order REC401041. The tasks are Job_001, Job_002, and Job_003, all with a description of '6 Mth Service'. The 'Asset Name' for each task is 'FokM (VC534)', 'FokM (LK435)', and 'FokM (HG344)' respectively. The 'Task Status' for all tasks is 'Inactive'. Below the table, the 'Task Detail' for Job_001 is shown, including 'Task Name', 'Task Description', 'Tracking Code', 'How are Invoice Lines Created', 'Description', 'Customer Asset', 'Style Name', and 'Scheduling Details'.

Finally, if you were to go to the Job Lines screen, you will see the planned job lines for each task, have been automatically created from the Job Template.

Job Orders

Location Map | Job Values | Create Required Purchase Orders | Create Required Assembly Orders

List | Detail | **Lines**

Order No: REC401041 [Open] Customer: Jones Warehousing Solutions

Batch Entry | Lists | Items | Descriptors | Kitsets | Templates | Catalogue Items | Iss

Seq	Task	Line No	Line Type	Code	Order Qty
20	Job_001	10	Item Code	850-2192	4
20	Job_001	20	Item Code	600-2172	2
20	Job_001	30	Descriptor Code	MILEAGE	2
30	Job_002	40	Item Code	850-2192	4
30	Job_002	50	Item Code	600-2172	2
30	Job_002	60	Descriptor Code	MILEAGE	2
40	Job_003	70	Item Code	850-2192	4
40	Job_003	80	Item Code	600-2172	2
40	Job_003	90	Descriptor Code	MILEAGE	2

Order Values | **Nett** \$176.22 | Cost \$165.00 | Margin % 6.37 | Markup % 6.8 | [%] Alter N

As each task is relevant to a different Asset, therefore once the task is deployed to the Freeway user it is represented in Freeway as shown below.

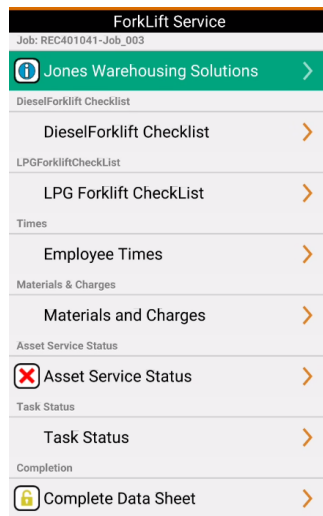
Start Date: 10 May 2018 (Today)

Job: REC401041-Job_003
 [Customer] Jones Warehousing Solutions
 [Time] 15:45 [Req Date] 20 Jan 2018
 [Address]
 [Asset] Forklift (VC5534) : Forklift Reg VC5534

Job: REC401041-Job_003
 [Customer] Jones Warehousing Solutions
 [Time] 15:45 [Req Date] 20 Jan 2018
 [Address]
 [Asset] Forklift (LK435) : Forklift Reg LK435

Job: REC401041-Job_003
 [Customer] Jones Warehousing Solutions
 [Time] 15:45 [Req Date] 20 Jan 2018
 [Address]
 [Asset] Forklift (HG344) : Forklift Reg HG344

Once the Freeway user selects the Asset they are to service, the process is the same as Method 2, in that they complete the Checklists and Asset Service Status which will update the relevant fields against the Job Task rather than the Job Header as in Method 2

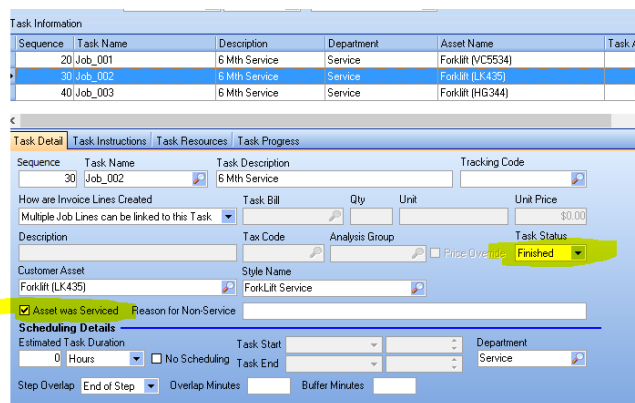


Further to this any Times, Materials issued on this Datasheet will update the relevant Job Task and Lines on the job that are linked to that Asset.


In this example, we serviced the Asset that was Linked to Task 'Job_002' and added 4 hours Labour

Seq	Task	Line No	Line Type	Code	Order Qty	Actual Qty	Cost M
20	Job_001	10	Item Code	850-2192	4	0	0
20	Job_001	20	Item Code	600-2172	2	0	0
20	Job_001	30	Descriptor Code	MILEAGE	2	0	0
30	Job_002	40	Item Code	850-2192	4	0	0
30	Job_002	50	Item Code	600-2172	2	0	0
30	Job_002	60	Descriptor Code	MILEAGE	2	0	0
30	Job_002	100	Labour Code	LAB-SERVICE	0	4	1
40	Job_003	70	Item Code	850-2192	4	0	0
40	Job_003	80	Item Code	600-2172	2	0	0
40	Job_003	90	Descriptor Code	MILEAGE	2	0	0

We also Updated the Asset Service Status via Freeway which then upon completion of the Datasheet updated the Job Task to 'Asset was Serviced'



At the same time, once we Changed the Task Status on Freeway, which upon completion of the Datasheet triggered Ostendo to change the Task Status for that Asset to Finished, thereby triggering a new asset planned schedule for that specific Asset.

Planning					
Batch Entry  Service Plans					
Planned Servicing	Recurring and Predictive Servicing	Recurring Invoices	Linked Warranties	Equipment	Maintenance History
Planned Date	Job Type	Template	Confirmation Status	Reminder Sent	Reminder Date
▶ 10/11/2018	Recurring	6 Mth Service	NotConfirmed	<input type="checkbox"/>	

Grouping Of Assets onto a consolidated Job

Method 4 – Overview:

This method of combining Assets onto one job influences the selection process of Asset servicing on the Suggested Required Orders screen. This effectively means that you can select 'one' Group asset to represent all 'Child' assets of a Service Type requiring a service.

This method is an alternative to Method 2 and NOT an extension as it works in a significantly different manner.

Typically, this method of servicing is suited to environments where there are mass assets, not just a few.

Further to this there is a new Service Rule, which allows you to set a horizon (number of days forward) to Exclude Planned Service Events along with any existing Jobs for Assets in that same Service Type. This rule controls whether future service dates for duplicate asset events are presented to you on the Suggested Orders Required Screen. The Horizon number of days setting is dependent upon the industry or assets you are dealing with.

Basically, if you are to create one job for multiple assets and there are some assets that are due for service so many days in advance of the Group Asset service date, you can automatically hide those requirements as that 'child' asset will be serviced when the Grouped asset job is created. For some industries this is important, for example if you were going to be servicing all assets for a site, the customer may not necessary want you to return to service one asset the next week, just because that assets planned service date did not coincide with all other assets. *(It may not coincide because you may have flagged it as 'Not' serviced from your previous visit, therefore the planned service date for the 'Child Asset' was never updated and has become out of sync with the Group Asset)*

The idea behind having a Group Asset is so the Service Co-Ordinator's need only see one asset representing a site. (ie: Group Asset) but still have 'Child' assets showing service history etc. This method is suitable in situations where you are servicing mass assets of a certain Service Type, and where those assets will all normally have the same planned service date.

This method does require some further and alternative setup to that described in Method 3, therefore we will only focus on the setup differences between the two methods.

Example:

For this example, we will use Hospital Beds in a Ward.

The Group Asset will represent the Ward, whilst each 'Child' asset represents a bed.

The Hospital requires the service personnel to service each bed in the ward on a monthly basis.

These assets are grouped together using the Service Type of 'Bed' and all having recurring schedule of 1 month which must make use of the same Job Type and Template

Setup:

- Create a Service Type of 'Std Bed'
- If necessary create a specific Job Type and also create a Job Template, these to be linked to the Assets.

NB: Ensure The 'Dynamically Create Tasks' option is ticked, along with the Service Type specified and optional Style Name to automatically control the opening of the appropriate Style template on Freeway.

The screenshot shows the 'Templates' application window. The 'Task Information' section contains a table with the following data:

Sequence	Task Name	Description	Job Lines to Task
10	Job	Standard Job Task	Multiple Job Lines can be linked to this Task

The 'Task Detail' section is expanded, showing the following fields:

- Sequence: 10
- Task Name: Job
- Task Description: Standard Job Task
- Department: Service
- How are Invoice Lines Created: Multiple Job Lines can be linked to this Task
- Task Bill Code: [empty]
- Qty: 1
- Unit: [empty]
- Description: [empty]
- Dynamically Create Tasks for Customer Assets when Template is Linked to a Group Service Asset
- Service Type to Condition Assets: Std Bed
- Style Name: Std Bed Check

The 'Scheduling Details' section is partially visible at the bottom, showing 'Estimated Duration' and 'Hours'.

- Create individual 'Child' Assets and link them to this Service Type. Each of these assets should have a service schedule setup.
NB: The scheduling of the 'Child' Asset does not actually rely on its own service schedule, rather it uses the 'Group Assets' schedule. However it is recommended that Child Asset does have this specified as you will not be able to easily determine when that specific asset is due for its next service. Eg: It may have previously been flagged as Not Serviced, which by having its own plan would show up as overdue on the Service Orders Required screen, thereby alerting you to that fact. That in itself may influence you to create a special job to service just that one asset on it's own to keep it within its service regime.

The screenshot shows the 'Customer Assets' detail view for 'Bed 3454'. The asset is active and located at 'Western District Hospital'. It is a 'Manual' asset created on '10/05/2018'. The 'Linked Service Type' is 'Std Bed'. The 'Customer Specific Information' section includes 'Location at Customer Site', 'Service Zone', and 'Days notice required' set to 30. The 'Warranty Info' section shows 'Warranty Status' as 'N/A'.

Planning

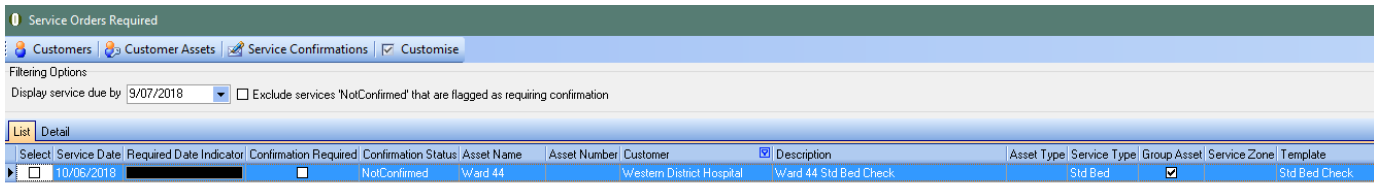
Batch Entry Service Plans

Planned Date	Job Type	Template	Confirmation Status	Rem
11/06/2018	Recurring	Std Bed Check	NotConfirmed	

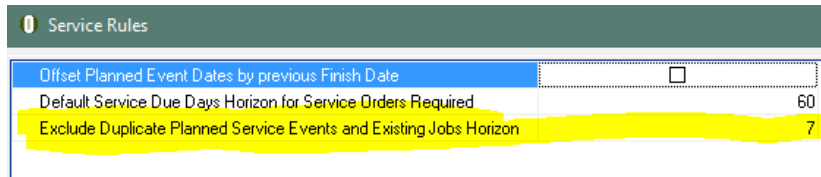
- Setup a Group Asset representing the Site or Location of the Child Assets. This asset must be setup with a service schedule and linked to the appropriate Service Type. Do not forget to flag this Asset as a 'Group Service Asset'

The screenshot shows the 'Customer Assets' detail view for 'Ward 44 Std Bed Check'. The asset is active and located at 'Western District Hospital'. It is a 'Manual' asset created on '10/05/2018'. The 'Linked Service Type' is 'Std Bed', and the 'Group Service Asset' checkbox is checked. The 'Customer Specific Information' section includes 'Location at Customer Site', 'Service Zone', and 'Days notice required' set to 30. The 'Warranty Info' section shows 'Warranty Status' as 'N/A'.

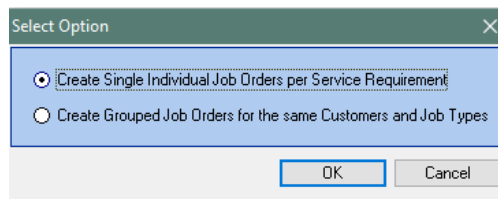
Run the Service Orders Required screen to determine the next service event.



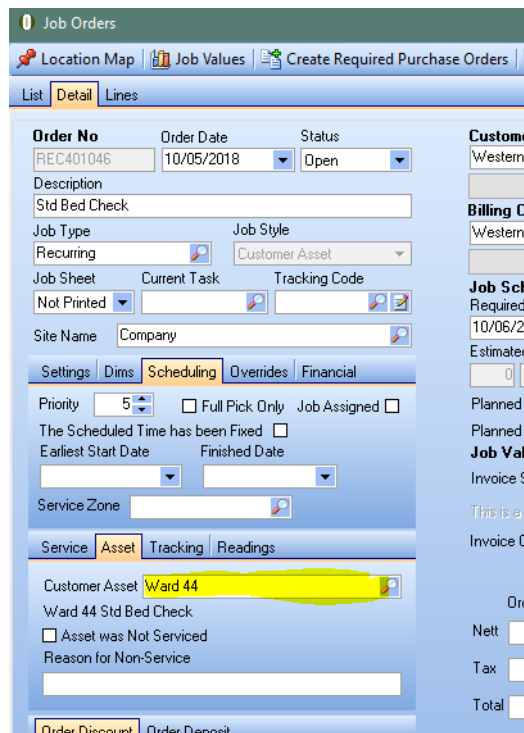
This will display the Group Asset rather than the Child Assets. However if any Child assets have different Service Dates, they will also be displayed depending upon your Service Rules shown below. (Refer to overview for details relating to this rule)



- From the Service Orders Required Screen, press the 'Generate Job Orders for Selected Services' button and select the 'Create Single Individual Job Orders per Service Requirement' option



- A single job order will now be created against the Group Asset



- Looking at the Job Tasks screen you will see that multiple tasks have been created representing each Asset to be serviced.

The screenshot displays the 'Job Tasks' application window. At the top, there are tabs for 'Job Orders', 'Job Transactions', and 'Customise'. Below this is a navigation bar with 'List' and 'Detail' options. The main area is divided into 'Job Information' and 'Task Information' sections.

Job Information:

- Order No: REC401046
- Description: Std Bed Check
- Status: Open
- Ordered Date: 10/05/2018
- Required Date: 10/06/2018
- Required Time of the Day: [Empty]
- Estimated Duration: 0 Minutes
- Planned Job Start Date: [Empty]
- Planned Job End Date: [Empty]
- Job Booking Status: Not Booked In

Task Information Table:

Sequence	Task Name	Description	Department	Asset Name	Task Assi
10	Job_001	Standard Job Task	Service	Bed 3454	<input type="checkbox"/>
20	Job_002	Standard Job Task	Service	Bed 5756	<input type="checkbox"/>
30	Job_003	Standard Job Task	Service	Bed 7647	<input type="checkbox"/>

Below the table is a 'Task Detail' section with tabs for 'Task Instructions', 'Task Resources', and 'Task Progress'. The 'Task Detail' tab is active, showing fields for:

- Sequence: 10
- Task Name: Job_001
- Task Description: Standard Job Task
- Tracking Code: [Empty]
- How are Invoice Lines Created: Multiple Job Lines can be linked to this Task
- Task Bill: [Empty]
- Qty: [Empty]
- Unit: [Empty]
- Unit Price: \$0.00
- Description: [Empty]
- Tax Code: [Empty]
- Analysis Group: [Empty]
- Price Override: Open
- Customer Asset: Bed 3454
- Style Name: Std Bed Check
- Asset was Serviced
- Reason for Non-Service: [Empty]

Scheduling Details:

- Estimated Task Duration: 0 Minutes
- No Scheduling
- Task Start: [Empty]
- Task End: [Empty]
- Department: Service

- From this point on, the job will be deployed to Freeway and each Task will be updated based on the Freeway Users as previously described in Method 3

This concludes the Ostendo / Freeway Servicing Of Assets Documentation.