



**South African Weather Service**  
**Technical Asset Management Administrator**  
**Training Manual**

## Document Review and Distribution

### Document location

### Revision history

Version	Author	Date	Revision	Email address
1.0	Sipho Banda	22/07/2019	Final	

### Document review

This document is deemed official only if the reviewers have signed below

Reviewer Name	Signature	Role	Date

### Document distribution

Version	Name	Date	Email Address

## Table of Contents

<b>1</b>	<b>INTRODUCTION .....</b>	<b>4</b>
1.1	DOCUMENT PURPOSE.....	4
1.2	SCOPE .....	4
1.3	PROCESS FLOW.....	5
<b>2</b>	<b>TECHNICAL ASSETS MANAGEMENT .....</b>	<b>7</b>
2.1	USERS AND USER GROUPS.....	7
2.2	DATA MAINTENANCE .....	16
2.3	REPORTS .....	18

# 1 INTRODUCTION

## 1.1 Document Purpose

The purpose of this training document is to provide steps on how to enter/maintain Assets and process transactions on the NetSuite system.

## 1.2 Scope

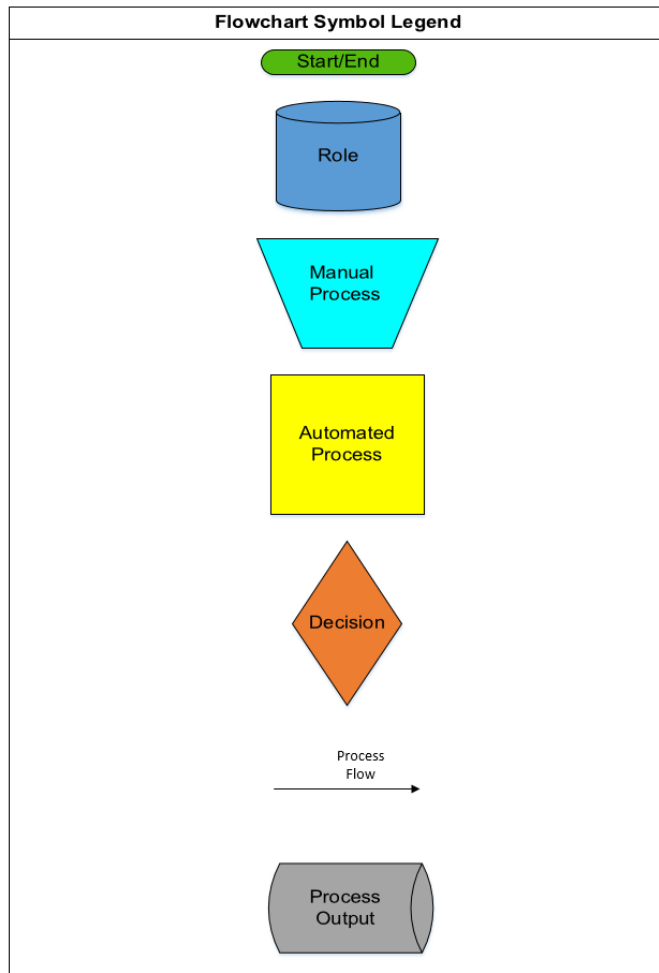
The focus of the training will be on the below functions in NetSuite:

- User and User Groups
- Data Maintenance
- Reports

## 1.3 Process Flow

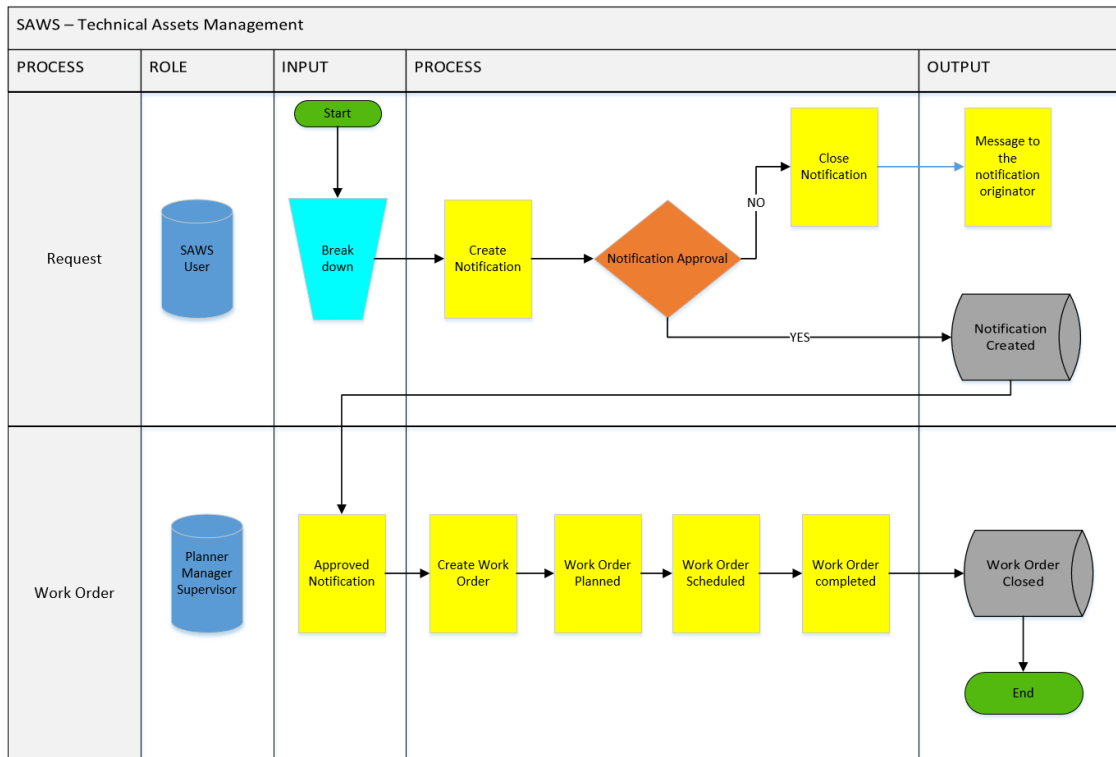
### Flowchart Legends

The following are the flowchart symbol legends:



## Technical Assets Management Process

The following figure shows the Technical Assets Management Process Flow:

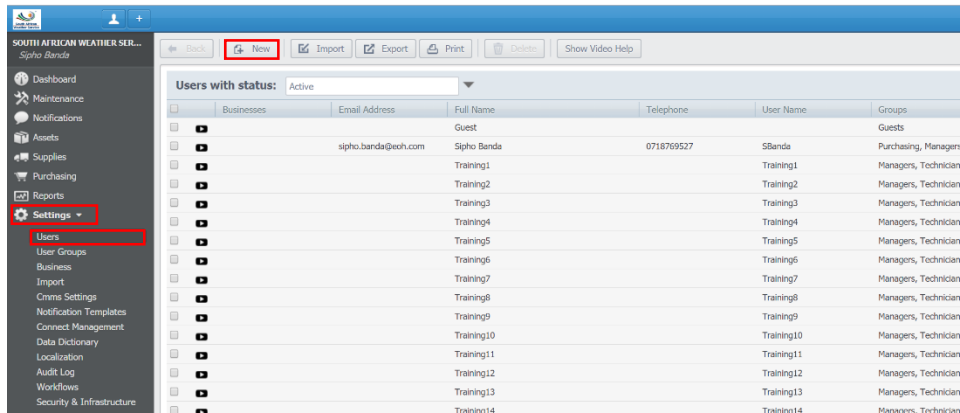


## 2 TECHNICAL ASSETS MANAGEMENT

### 2.1 Users and User Groups

#### 2.1.1 Add User

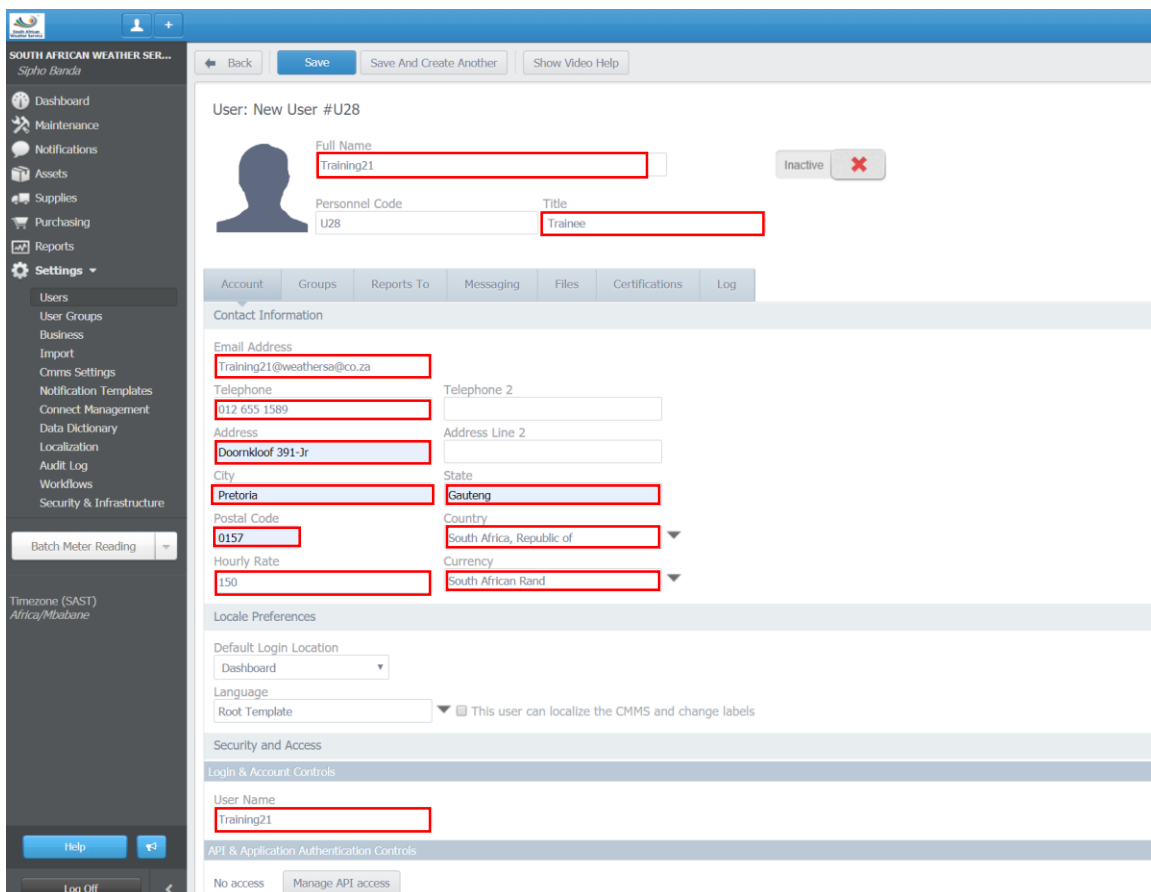
- Go to Settings > Users > New.



The screenshot shows the user management interface. The left sidebar contains a menu with 'Settings' highlighted. The top toolbar has a 'New' button highlighted. The main area displays a table of users with the following data:

Users with status: Active						
	Businesses	Email Address	Full Name	Telephone	User Name	Groups
<input type="checkbox"/>	<input type="checkbox"/>		Guest			Guests
<input type="checkbox"/>	<input type="checkbox"/>	sipho.banda@weh.com	Sipho Banda	0718769527	SBanda	Purchasing, Managers,
<input type="checkbox"/>	<input type="checkbox"/>		Training1		Training1	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training2		Training2	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training3		Training3	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training4		Training4	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training5		Training5	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training6		Training6	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training7		Training7	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training8		Training8	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training9		Training9	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training10		Training10	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training11		Training11	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training12		Training12	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training13		Training13	Managers, Technicians
<input type="checkbox"/>	<input type="checkbox"/>		Training14		Training14	Managers, Technicians

- Enter values for the following fields on the Account tab:
  - Full Name – Training21
  - Title – Trainee
  - Email – [Training21@weathersa.co.za](mailto:Training21@weathersa.co.za)
  - Telephone – 012 655 1589
  - Address - Doornkloof 391-Jr
  - City – Pretoria
  - State – Gauteng
  - Postal Code – 0157
  - Country – South Africa, Republic of
  - Hourly Rate – 150
  - User Name – Training21



The screenshot shows the 'User: New User #U28' configuration page. The 'Account' tab is selected, and various fields are highlighted with red boxes to indicate the values to be entered. The 'Inactive' checkbox is checked. The 'Locale Preferences' section shows the default login location as 'Dashboard', language as 'Root Template', and a checked option for localization. The 'Security and Access' section shows the user name as 'Training21' and no API access.

**User: New User #U28**

Full Name: Training21  
 Personnel Code: U28  
 Title: Trainee

**Contact Information**

Email Address: Training21@weathersa.co.za  
 Telephone: 012 655 1589  
 Address: Doornkloof 391-Jr  
 City: Pretoria  
 State: Gauteng  
 Postal Code: 0157  
 Country: South Africa, Republic of  
 Hourly Rate: 150  
 Currency: South African Rand

**Locale Preferences**

Default Login Location: Dashboard  
 Language: Root Template  
 This user can localize the CMMS and change labels

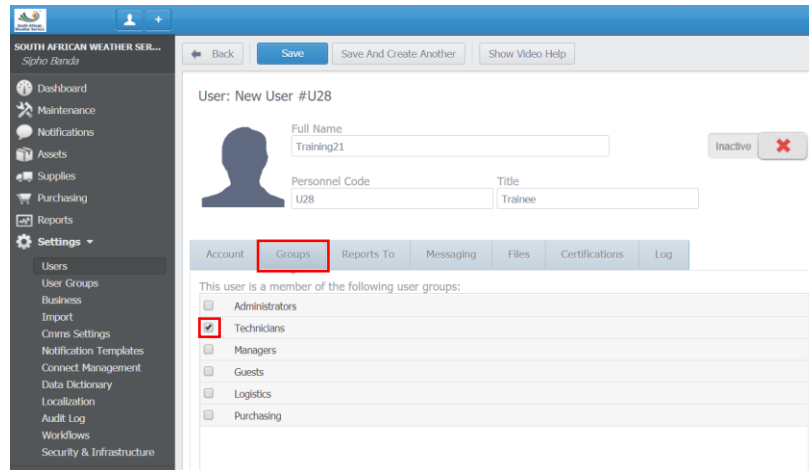
**Security and Access**

Login & Account Controls  
 User Name: Training21

API & Application Authentication Controls  
 No access | Manage API access

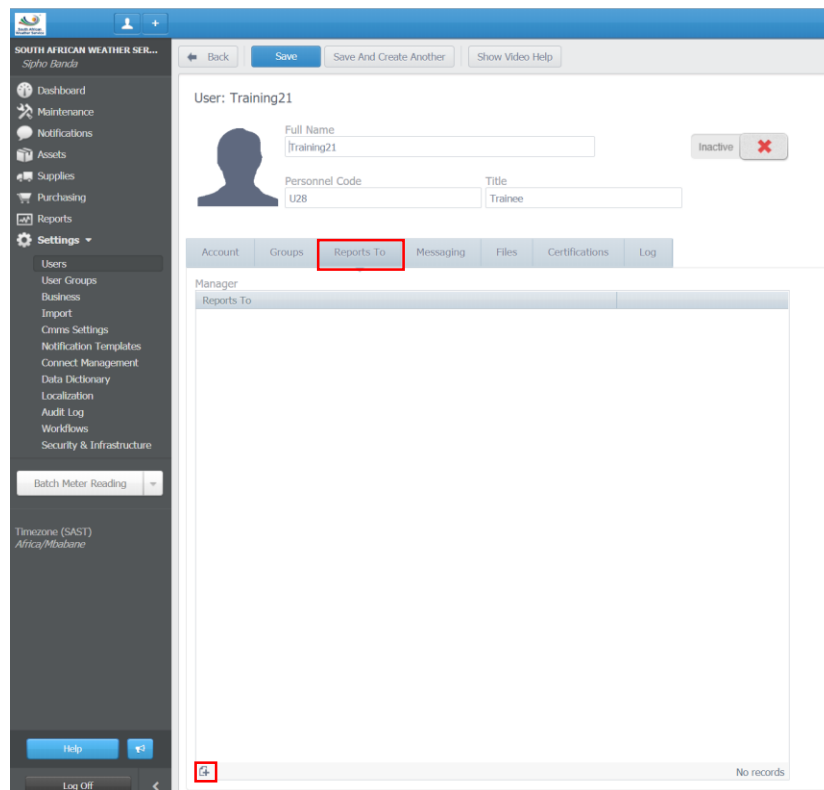


- Select the role on the Groups tab e.g. Technicians.

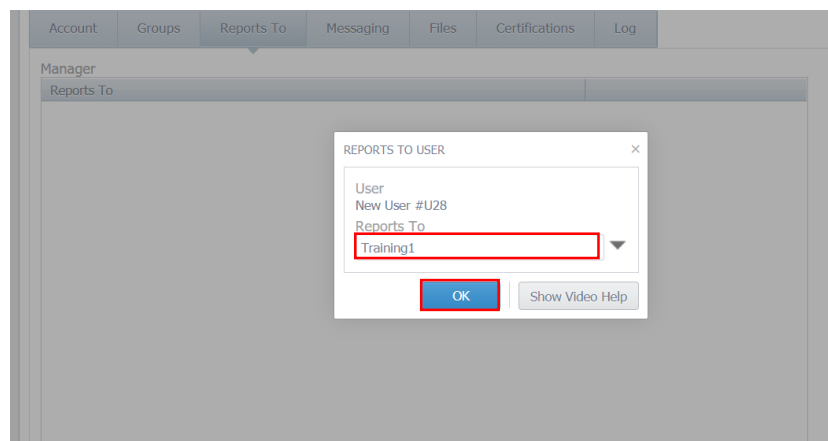


The screenshot shows a web application interface for user management. The title bar reads "SOUTH AFRICAN WEATHER SER..." and the user's name "Sipho Banda" is visible. The main content area is titled "User: New User #U28". It contains a profile picture placeholder, a "Full Name" field with the value "Training21", and an "Inactive" toggle button. Below this are "Personnel Code" (U28) and "Title" (Trainee) fields. A horizontal menu at the bottom of the main area includes "Account", "Groups" (highlighted with a red box), "Reports To", "Messaging", "Files", "Certifications", and "Log". Under the "Groups" tab, a list of user groups is shown with checkboxes: Administrators, Technicians (checked and highlighted with a red box), Managers, Guests, Logistics, and Purchasing. A left-hand navigation menu lists various system settings and tools.

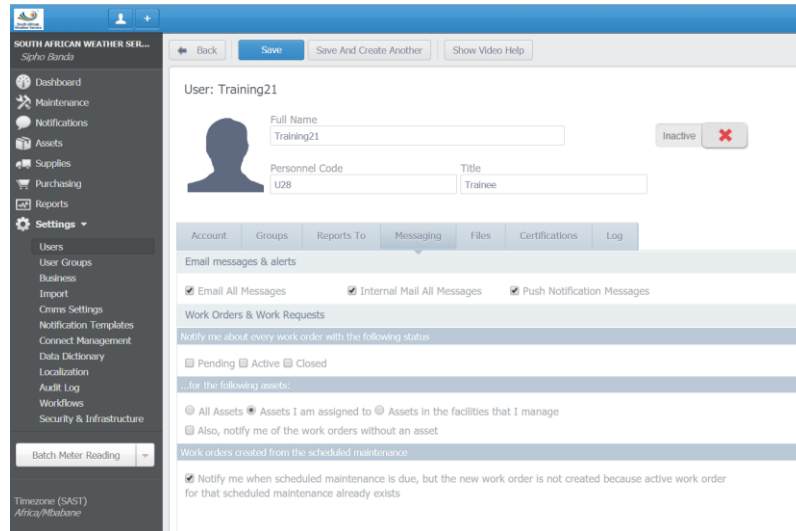
- Click the Report To tab then add button



- Enter the managers name e.g. Training1 then click the OK button.



- Tick the check boxes as per below



South African Weather Service - User: Training21

Full Name: Training21  Inactive

Personnel Code: U28 Title: Trainee

Account Groups Reports To Messaging Files Certifications Log

Email messages & alerts

Email All Messages  Internal Mail All Messages  Push Notification Messages

Work Orders & Work Requests

Notify me about every work order with the following status

Pending  Active  Closed

...for the following assets:

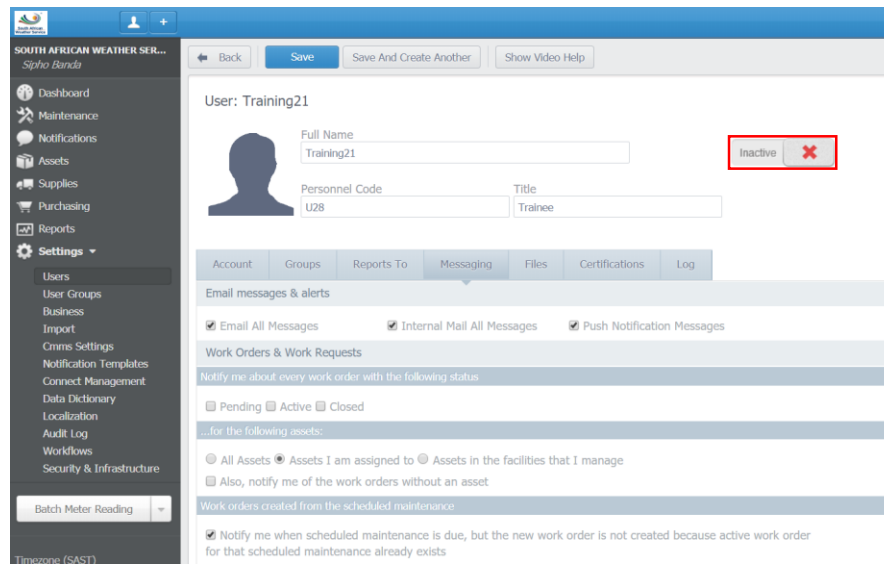
All Assets  Assets I am assigned to  Assets in the facilities that I manage

Also, notify me of the work orders without an asset

Work orders created from the scheduled maintenance

Notify me when scheduled maintenance is due, but the new work order is not created because active work order for that scheduled maintenance already exists

- Click the Inactive button to activate the user profile.



South African Weather Service - User: Training21

Full Name: Training21  Inactive

Personnel Code: U28 Title: Trainee

Account Groups Reports To Messaging Files Certifications Log

Email messages & alerts

Email All Messages  Internal Mail All Messages  Push Notification Messages

Work Orders & Work Requests

Notify me about every work order with the following status

Pending  Active  Closed

...for the following assets:

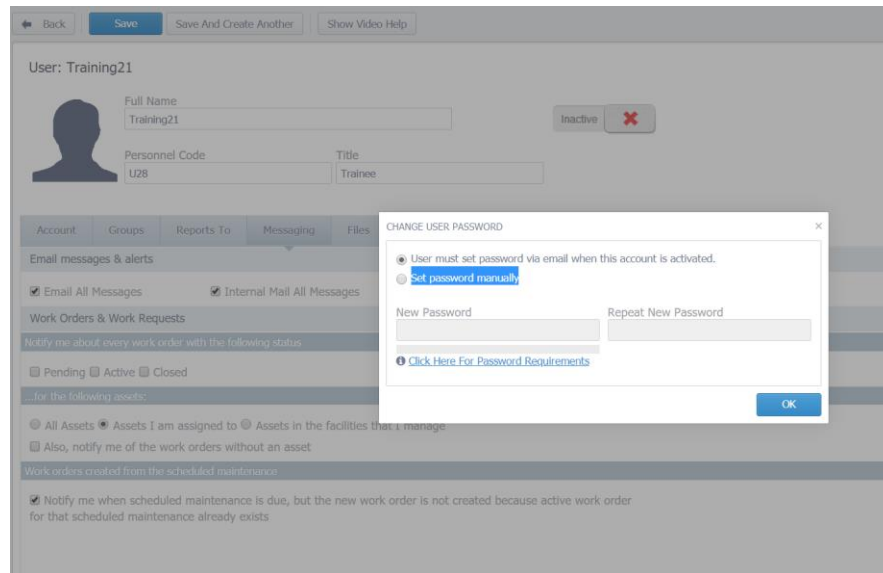
All Assets  Assets I am assigned to  Assets in the facilities that I manage

Also, notify me of the work orders without an asset

Work orders created from the scheduled maintenance

Notify me when scheduled maintenance is due, but the new work order is not created because active work order for that scheduled maintenance already exists

- Select the User must set password via email when this account is activated option or Set password manually then Click the OK button.



Back Save Save And Create Another Show Video Help

User: Training21

Full Name Training21 Inactive ✖

Personnel Code U28 Title Trainee

Account Groups Reports To Messaging Files

CHANGE USER PASSWORD

User must set password via email when this account is activated.

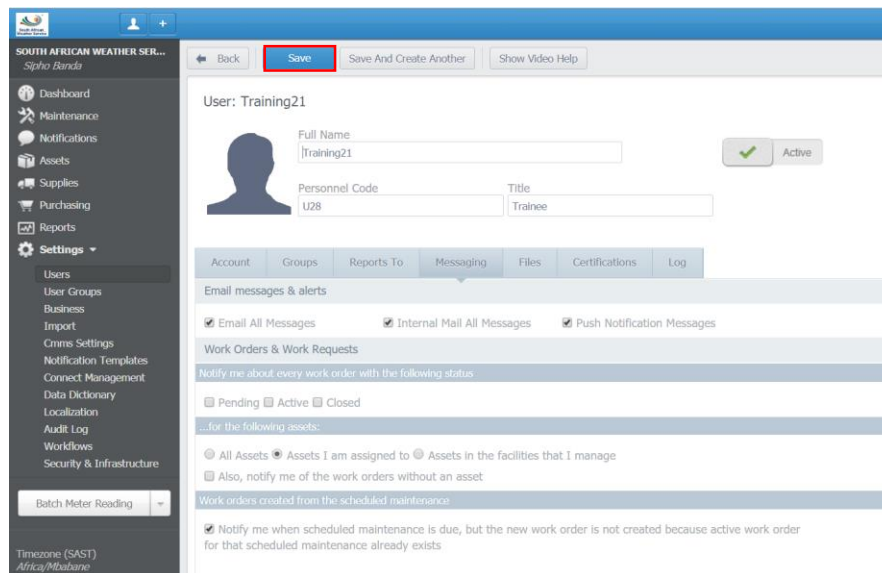
Set password manually

New Password Repeat New Password

[Click Here For Password Requirements](#)

OK

- Click the Save button



SOUTH AFRICAN WEATHER SER... Sipho Banda

Back Save Save And Create Another Show Video Help

User: Training21

Full Name Training21 Active ✓

Personnel Code U28 Title Trainee

Account Groups Reports To Messaging Files Certifications Log

Email messages & alerts

Email All Messages  Internal Mail All Messages  Push Notification Messages

Work Orders & Work Requests

Notify me about every work order with the following status

Pending  Active  Closed

...for the following assets:

All Assets  Assets I am assigned to  Assets in the facilities that I manage

Also, notify me of the work orders without an asset

Work orders created from the scheduled maintenance

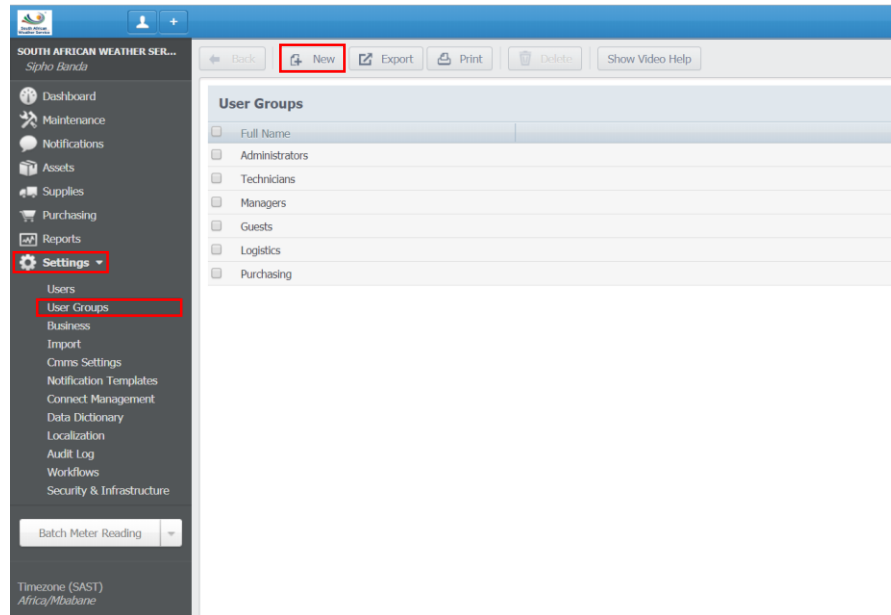
Notify me when scheduled maintenance is due, but the new work order is not created because active work order for that scheduled maintenance already exists

Batch Meter Reading

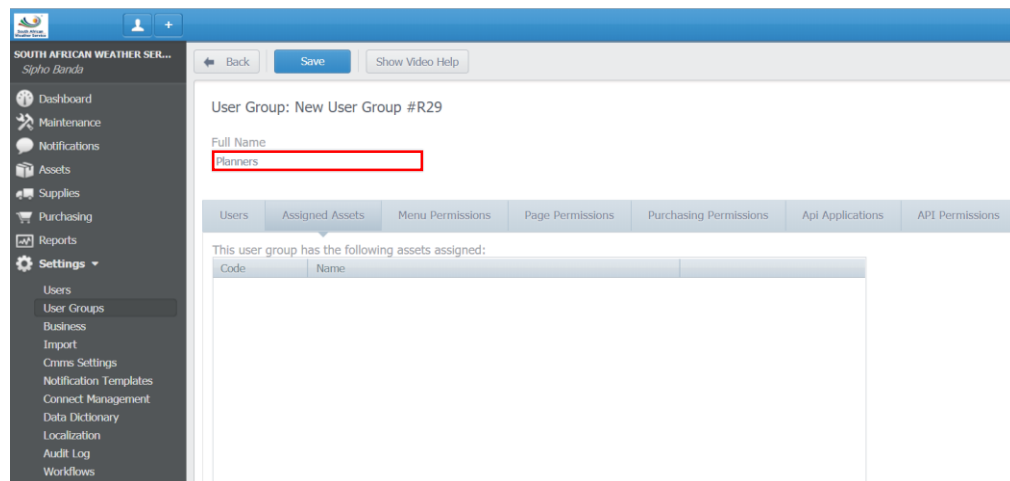
Timezone (SAST) Africa/Mbabane

## 2.1.2 Add User Groups

- Go to Settings > User Groups > New.



- Enter the Full Name e.g. Planners



- Under the Menu Permission, select permissions

SOUTH AFRICAN WEATHER SER...  
Sipho Banda

← Back Save Show Video Help

User Group: New User Group #R29

Full Name  
Planners

Users Assigned Assets **Menu Permissions** Page Permissions Purchasing Permissions Api Applications

This user group has the following menu permissions:

- Can See 'Settings' Top Menu
- Can See 'Users' Menu Item
- Can See 'User Groups' Menu Item
- Can See 'Business' Menu Item
- Can See 'Import' Menu Item
- Can See 'Cmms Settings' Menu Item
- Can See 'Notification Templates' Menu Item
- Can See 'Connect Management' Menu Item
- Can See 'Localization' Menu Item
- Can See 'Audit Log' Menu Item
- Can See 'Workflows' Menu Item
- Can See 'Security And Infrastructure' Menu Item
- Can See 'Help' Top Menu
- Can See 'Log Off' Top Menu
- Can See 'Dashboard' Top Menu
- Can See 'Dashboard' Menu Item
- Can See 'Calendar' Menu Item
- Can See 'Assigned Assets' Menu Item
- Can See 'Assigned Work Orders' Menu Item
- Can See 'Submit Work Request' Menu Item
- Can See 'My Purchase Requests' Menu Item
- Can See 'Submit Purchase Request' Menu Item
- Can See 'Maintenance' Top Menu
- Can See 'Work Orders' Menu Item
- Can See 'Scheduled Maintenance' Menu Item

51 record.

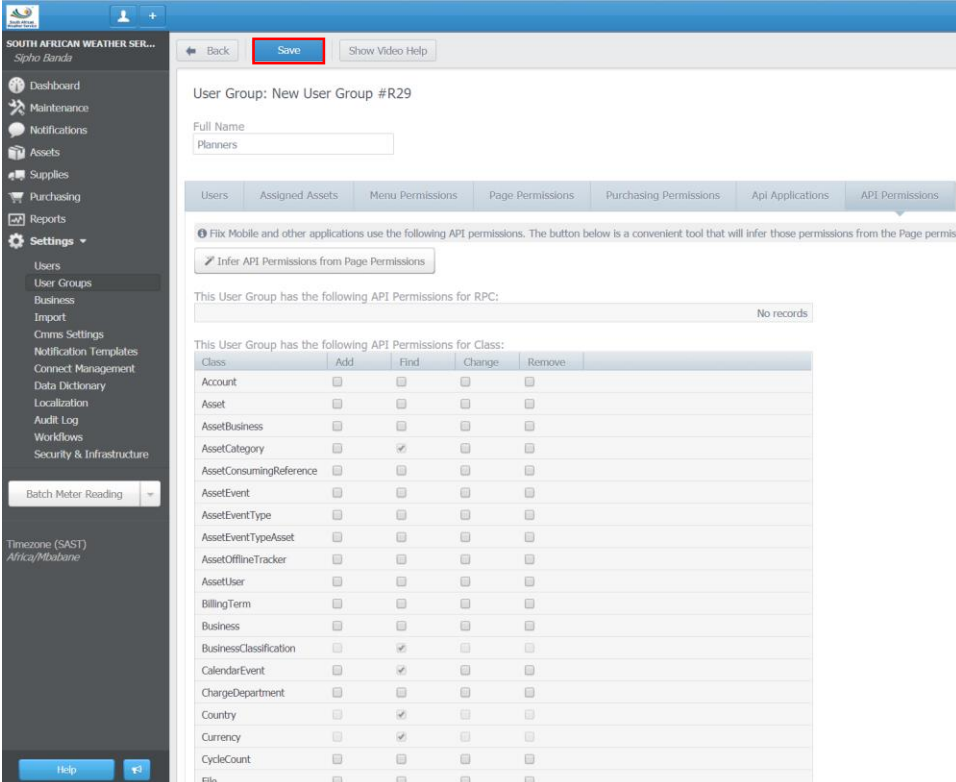
Batch Meter Reading

Timezone (SAST)  
Africa/Mbabane

Help

Log Off

- Under API Permissions, select permissions then save.



The screenshot shows the 'API Permissions' configuration page for a user group. The 'Save' button is highlighted with a red box. The interface includes a sidebar with navigation options and a main content area with a table of permissions.

**User Group: New User Group #R29**

Full Name:

Navigation tabs: Users, Assigned Assets, Menu Permissions, Page Permissions, Purchasing Permissions, Api Applications, **API Permissions**

Info: Fix Mobile and other applications use the following API permissions. The button below is a convenient tool that will infer those permissions from the Page permissions.

This User Group has the following API Permissions for RPC: No records

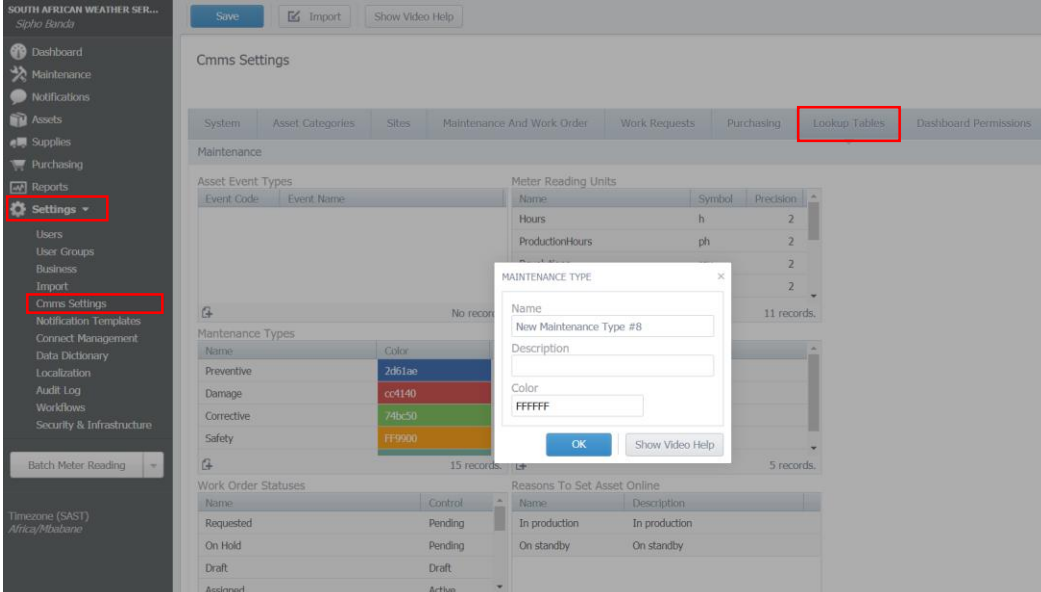
This User Group has the following API Permissions for Class:

Class	Add	Find	Change	Remove
Account	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asset	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AssetBusiness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AssetCategory	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AssetConsumingReference	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AssetEvent	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AssetEventType	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AssetEventTypeAsset	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AssetOfflineTracker	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AssetUser	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BillingTerm	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BusinessClassification	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CalendarEvent	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ChargeDepartment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Country	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Currency	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CycleCount	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
File	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## 2.2 Data Maintenance

To update or add maintenance types

- Go to Settings > Cmms Settings > Lookup Tables then click the add button on maintenance types table. Enter the name and description.



The screenshot shows the 'Cmms Settings' interface with the 'Lookup Tables' tab selected. A modal window titled 'MAINTENANCE TYPE' is open, allowing the user to add a new maintenance type. The modal contains the following fields:

- Name:** New Maintenance Type #8
- Description:** (empty)
- Color:** FFFFFFFF

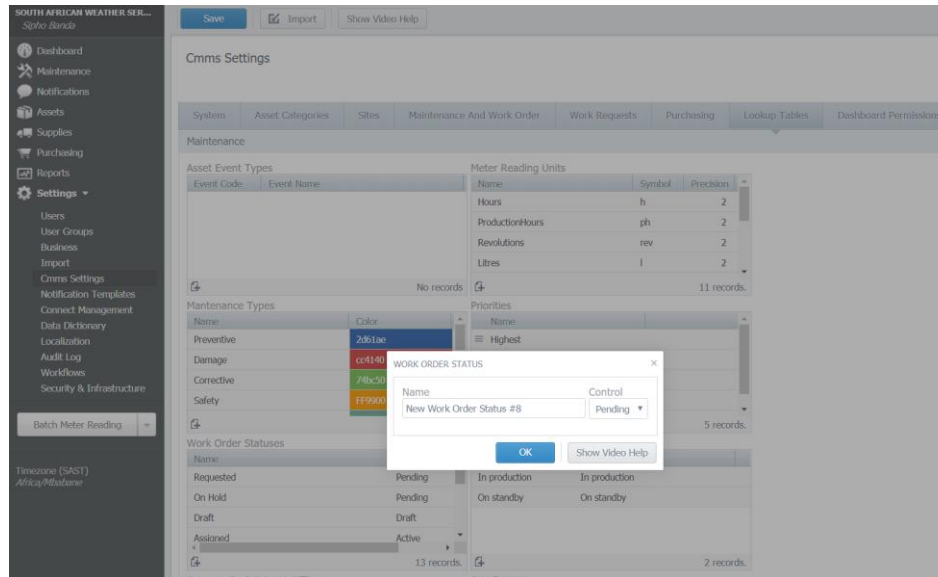
The background interface shows the 'Maintenance Types' table with the following data:

Name	Color
Preventive	7d61ae
Damage	cc4140
Corrective	98bc50
Safety	ff9900



To update or add work order statuses

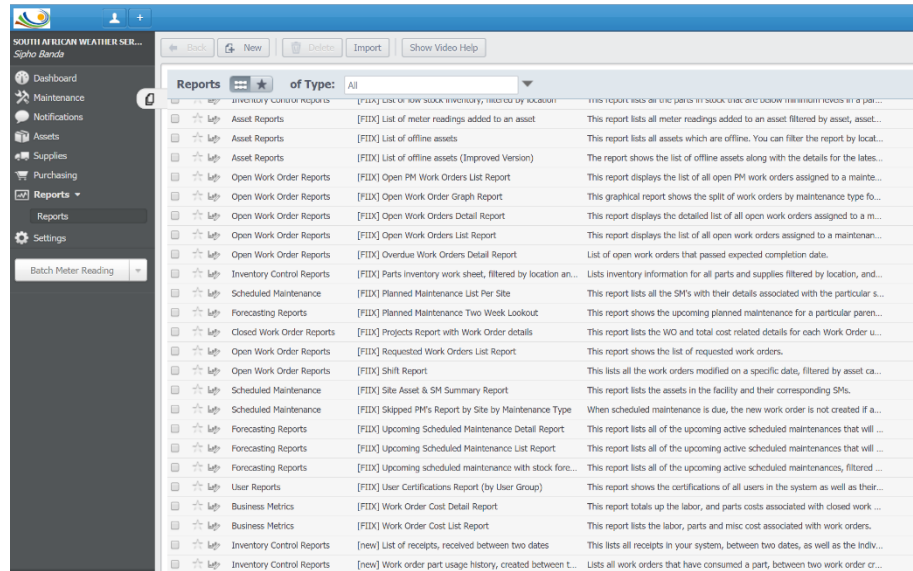
- Go to Settings > CmmS Settings > Lookup Tables then click the add button on work order statuses table. Enter the name and description.



## 2.3 Reports

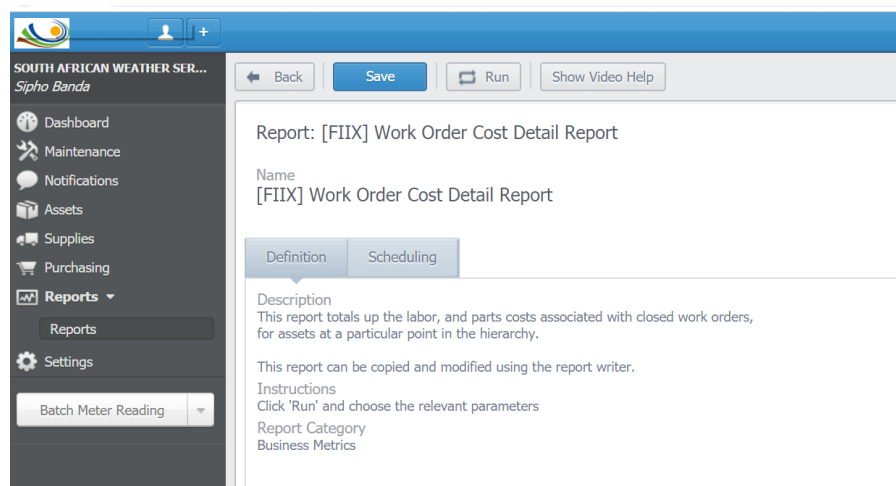
To run a Work Order Cost Detail Report:

- Go to Reports > Work Order Cost Detail Report



The screenshot shows the 'Reports' menu in the South African Weather Service application. The menu is open, displaying a list of reports. The 'Work Order Cost Detail Report' is highlighted. The report is categorized under 'Business Metrics' and is described as '[FIIX] Work Order Cost Detail Report'. The report is intended to total up labor and parts costs associated with closed work orders for assets at a particular point in the hierarchy.

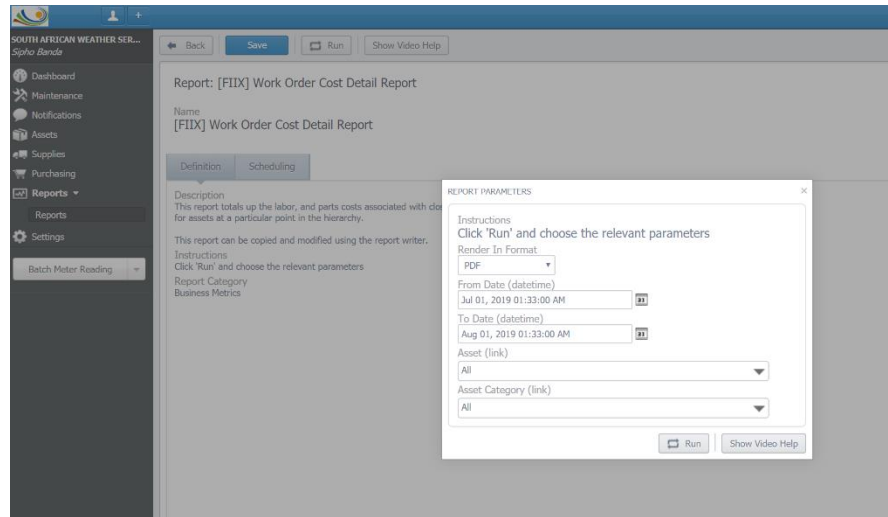
- Click the Run button.



The screenshot shows the configuration screen for the '[FIIX] Work Order Cost Detail Report'. The 'Run' button is highlighted. The report is categorized under 'Business Metrics'. The description states: 'This report totals up the labor, and parts costs associated with closed work orders, for assets at a particular point in the hierarchy. This report can be copied and modified using the report writer.' The instructions are: 'Click 'Run' and choose the relevant parameters'. The report category is 'Business Metrics'.

- Enter values for the following values:
  - From Date (datetime) e.g. Ju 01, 2019
  - To Date (datetime) e.g. Aug 01, 2019

Then Click the Run button.



- Review the Work Order Cost Detail Report

South African Weather Service



[FIX] Work Order Cost Detail Report							
This report was run on: Aug 01, 2019 01:37:50 AM with the following parameters From Date: Jul 01, 2019 01:40:00 AM To Date: Sep 01, 2019 01:40:00 AM Asset: "All" Asset Category: "All"							
Asset Code	Asset Name						
		WO Code	Description	Labor Cost	Parts Cost	Misc Cost	Total Cost
		58	Breakdown				
		-----					
Asset Code	Asset Name						
A13	26062						
		WO Code	Description	Labor Cost	Parts Cost	Misc Cost	Total Cost
		47	Test		30.00		30.00
		69	Notification Test				
		71	Testing				
					30.00		30.00
		-----					
Asset Code	Asset Name						
A17	A290007						
		WO Code	Description	Labor Cost	Parts Cost	Misc Cost	Total Cost
		63	There is a crack on wall.	400.00			400.00
				400.00			400.00
		-----					
Asset Code	Asset Name						
A29	A290008						
		WO Code	Description	Labor Cost	Parts Cost	Misc Cost	Total Cost
		79	Testing				
		-----					
Asset Code	Asset Name						
A46	24324						
		WO Code	Description	Labor Cost	Parts Cost	Misc Cost	Total Cost
		67	There is a breakdown.				
		80	Radar is down.	160.00	600.00	1,000.00	1,760.00
				160.00	600.00	1,000.00	1,760.00
		-----					
Asset Code	Asset Name						
A61	FAM035150						
		WO Code	Description	Labor Cost	Parts Cost	Misc Cost	Total Cost
		86	The radar is down again.	240.00	30.00	1,000.00	1,270.00
				240.00	30.00	1,000.00	1,270.00
				800.00	660.00	2,000.00	3,460.00