South African Weather Service

Technical Asset Management Administrator Training Manual

Document Review and Distribution

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Document review

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

Reviewer Name	Signature	Role	Date

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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

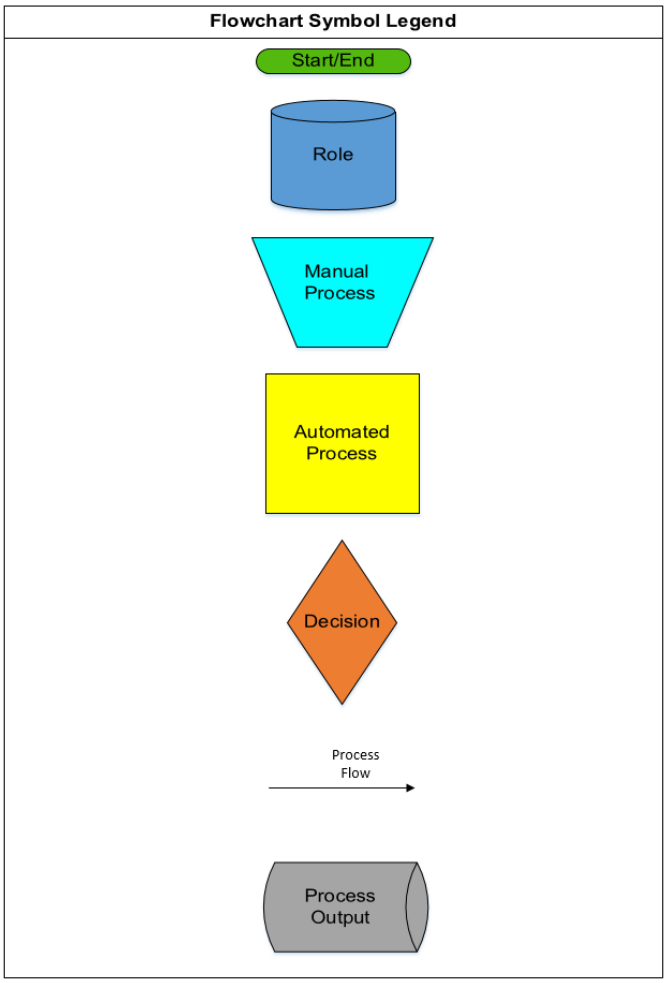
The focus of the training will be on the below functions in NetSuite:

- User and User Groups
- Data Maintenance
- Reports

1.3 Process Flow

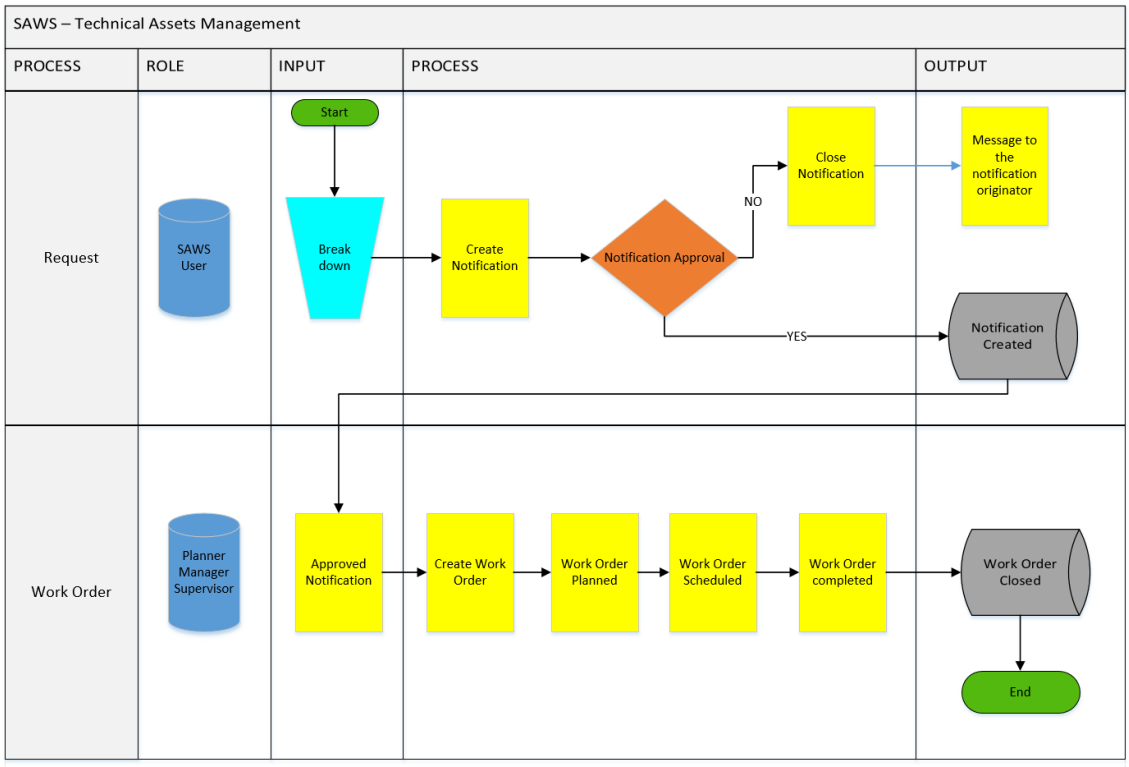
Flowchart Legends

The following are the flowchart symbol legends:



Technical Assets Management Process

The following figure shows the Technical Assets Management Process Flow:

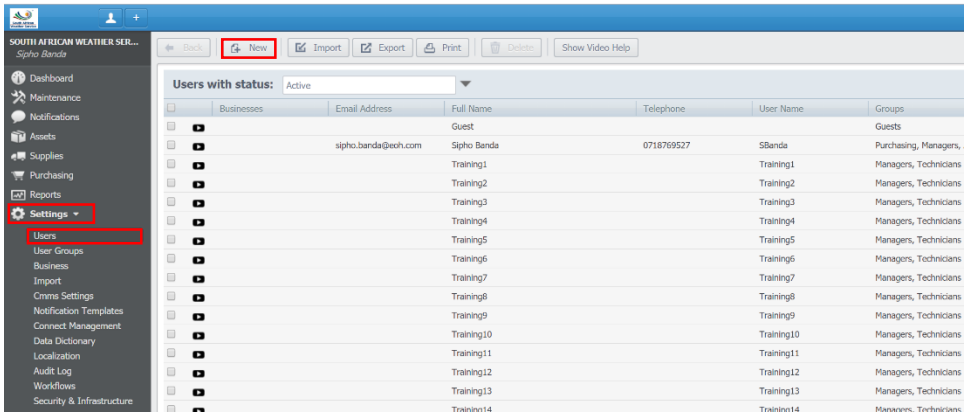


2 TECHNICAL ASSETS MANAGEMENT

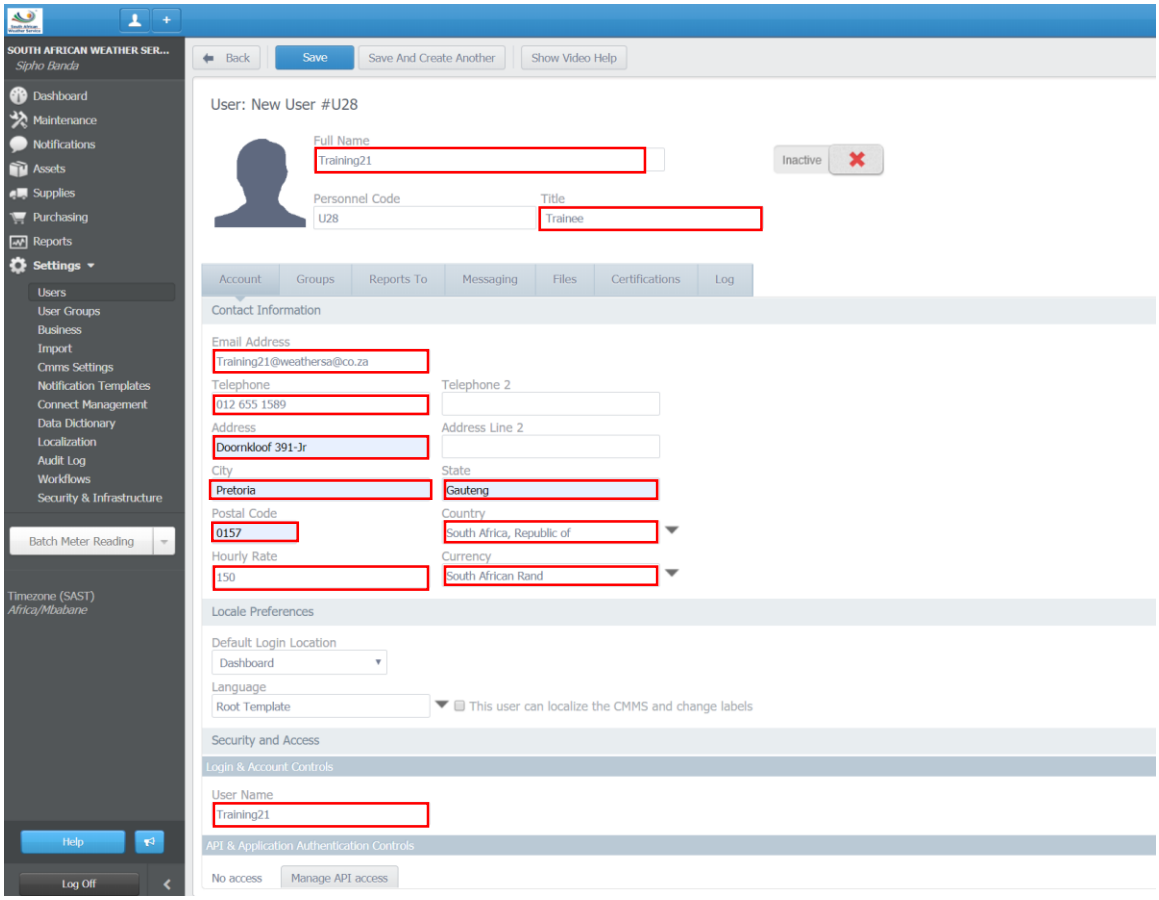
2.1 Users and User Groups

2.1.1 Add User

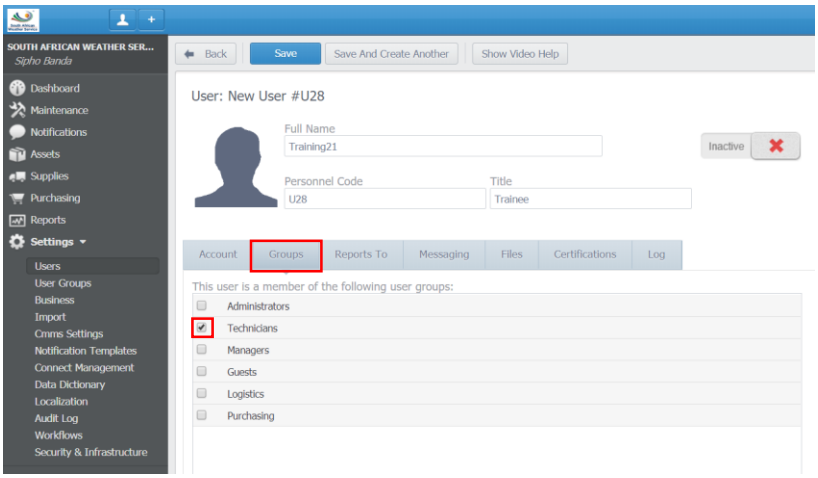
- Go to Settings > Users > New.



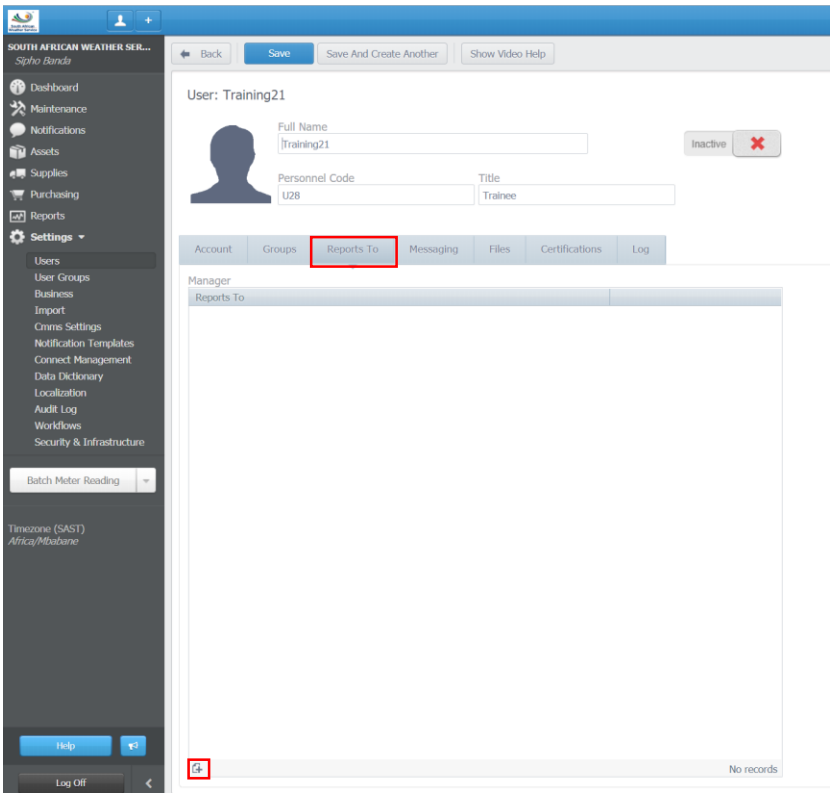
- Enter values for the following fields on the Account tab:
  - Full Name – Training21
  - Title – Trainee
  - Email – Training21@weathersa.co.za
  - Telephone – 012 655 1589
  - Address - Doornkloof 391-Jr
  - City – Pretoria
  - State – Gauteng
  - Postal Code – 0157
  - Country – South Africa, Republic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



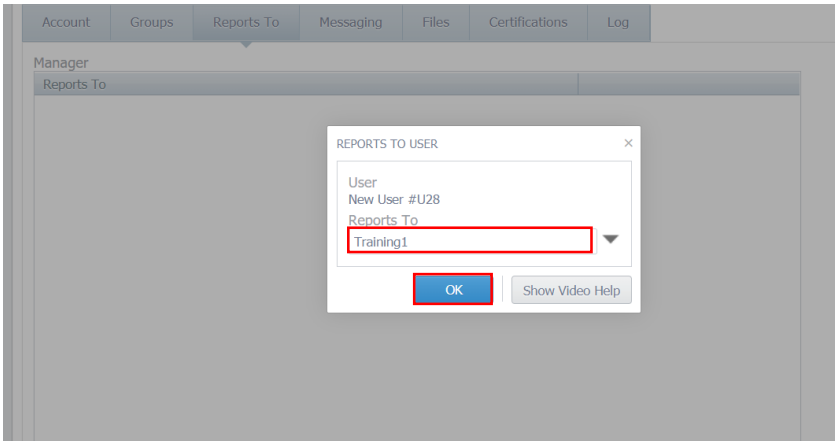
- Select the role on the Groups tab e.g. Technicians.



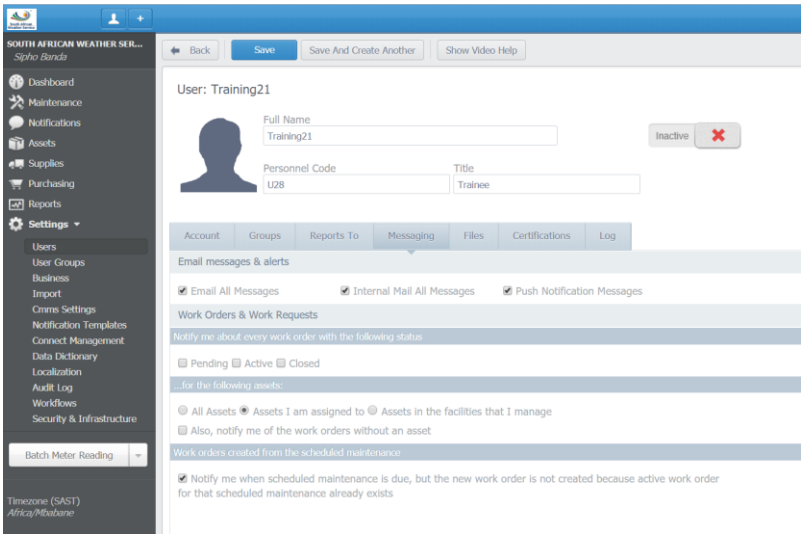
- Click the Report To tab then add button



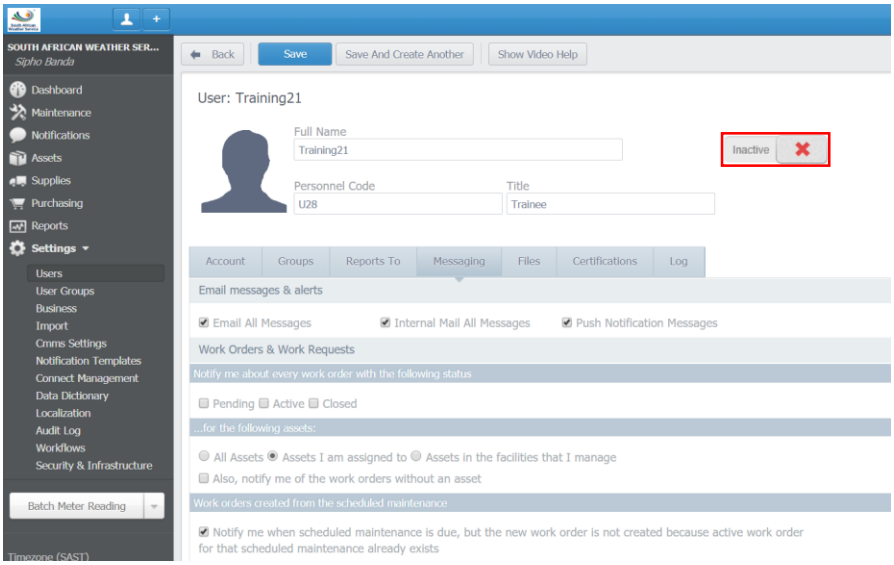
- Enter the managers name e.g. Training1 then click the OK button.



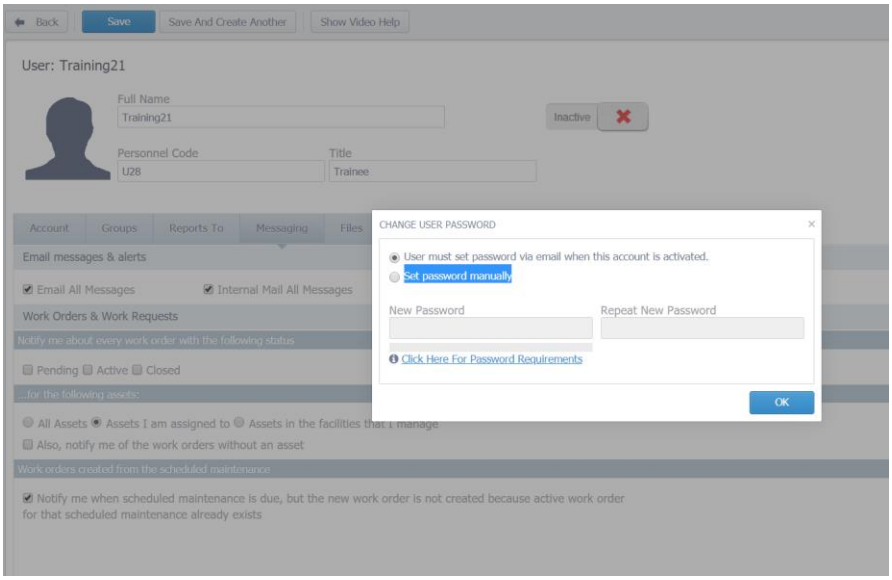
- Tick the check boxes as per below



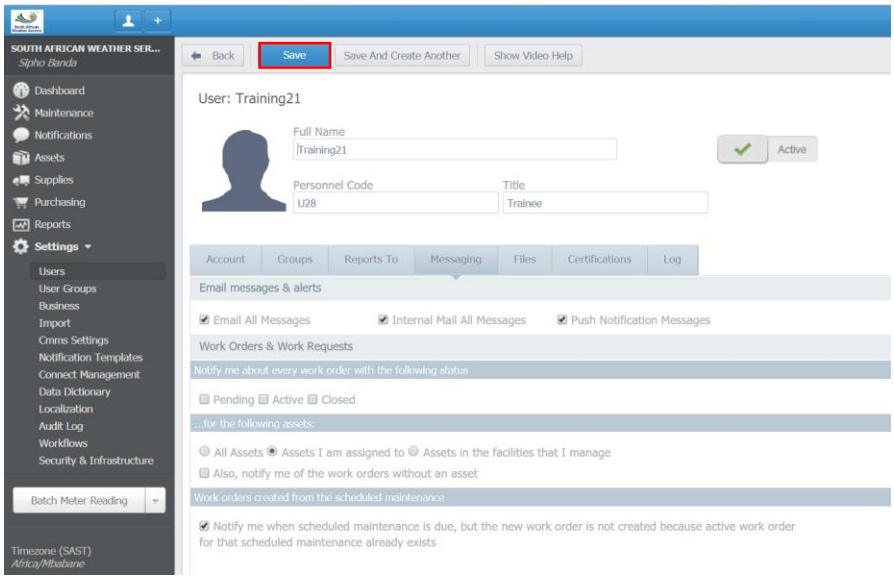
- Click the Inactive button to activate the user profile.



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

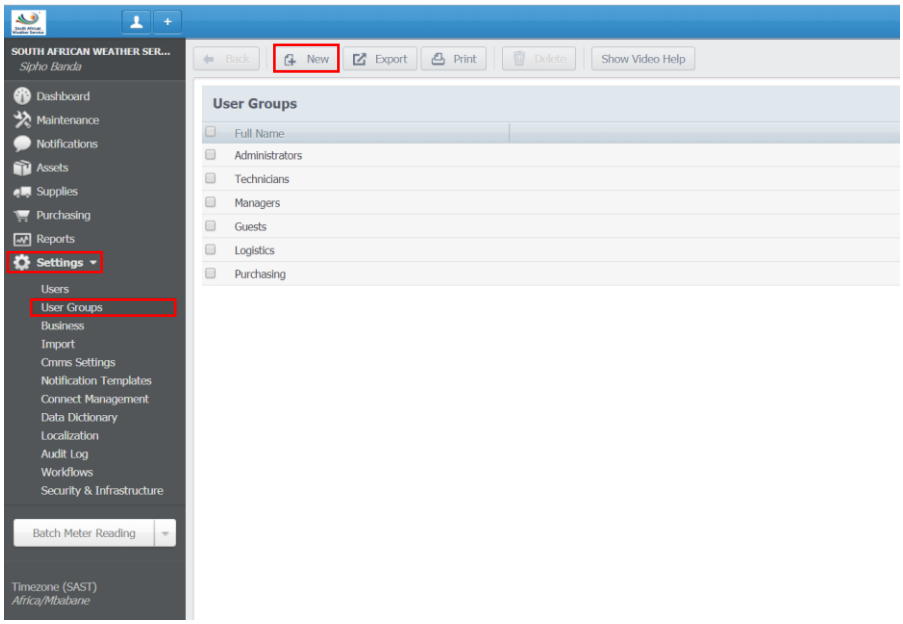


- Click the Save button

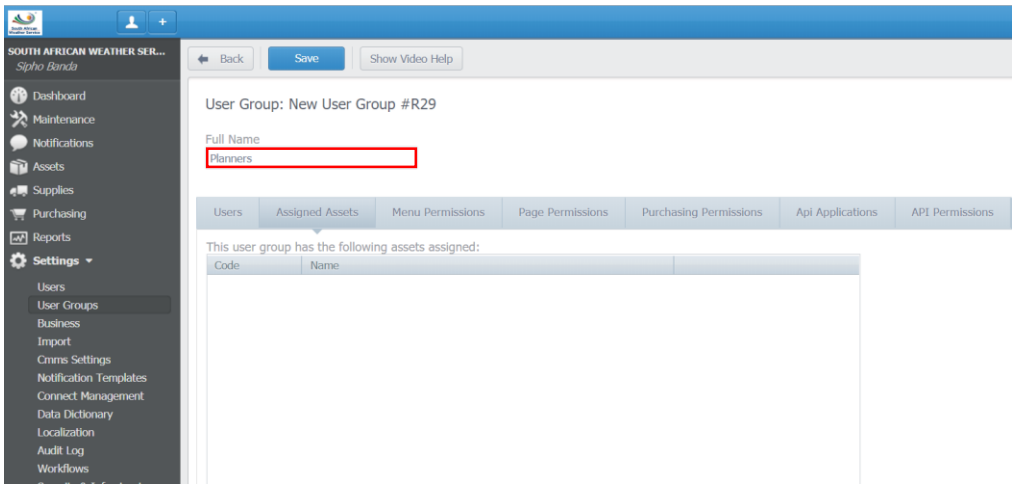


2.1.2 **Add User Groups**

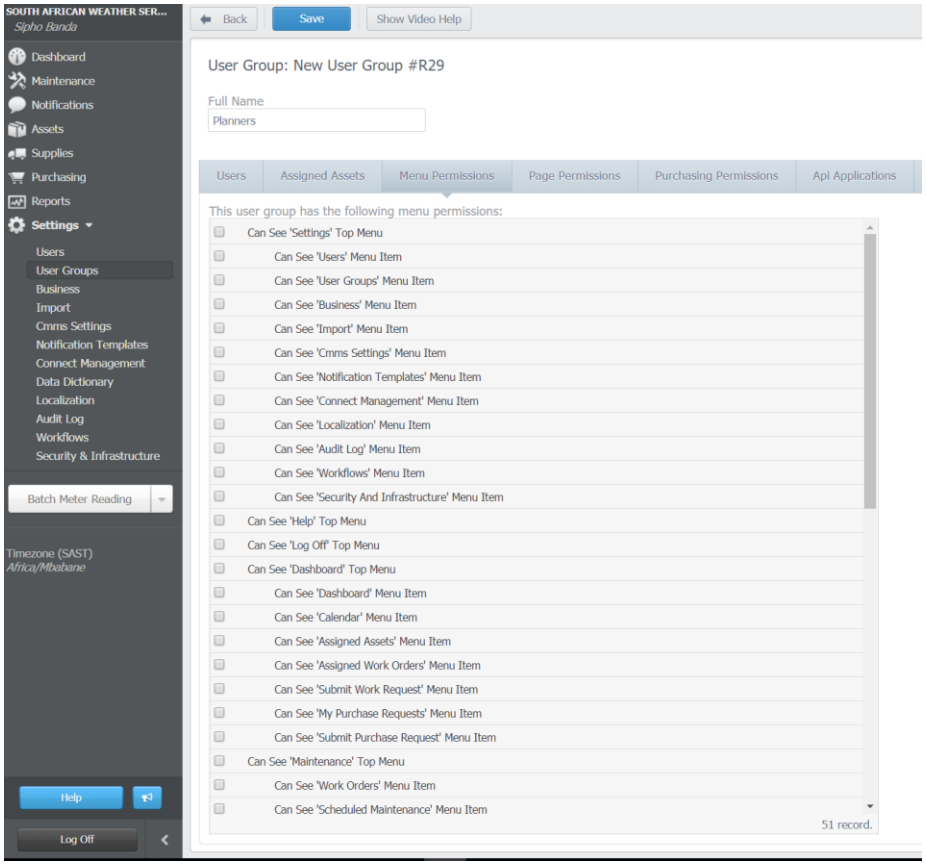
- Go to Settings > User Groups > New.



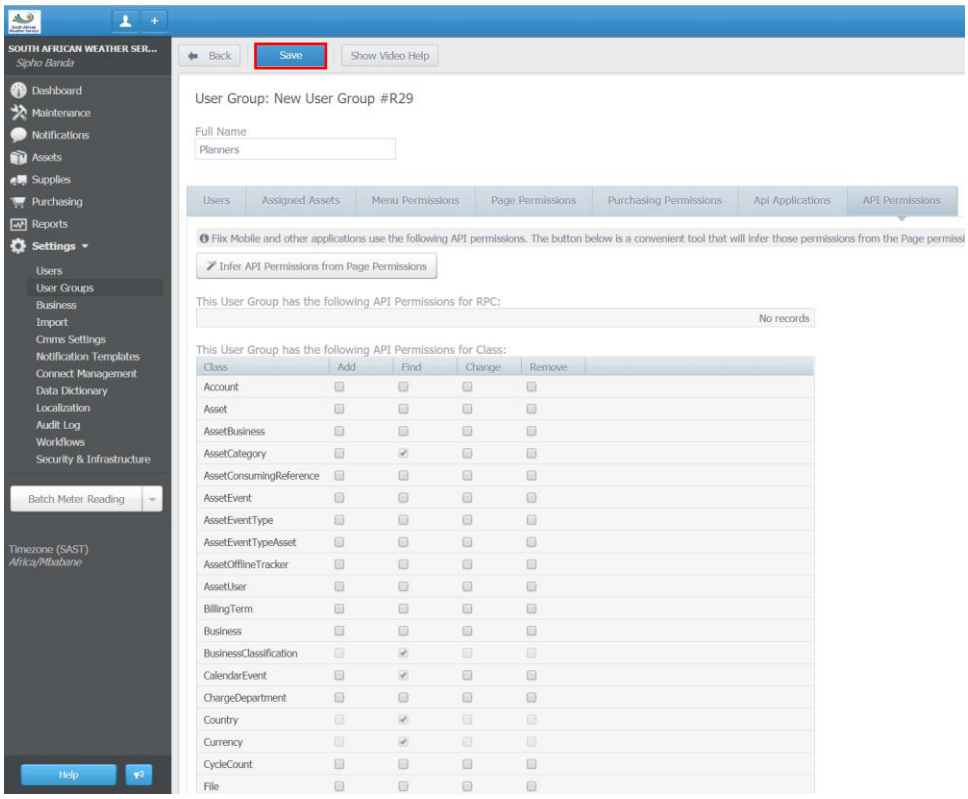
- Enter the Full Name e.g. Planners



- Under the Menu Permission, select permissions



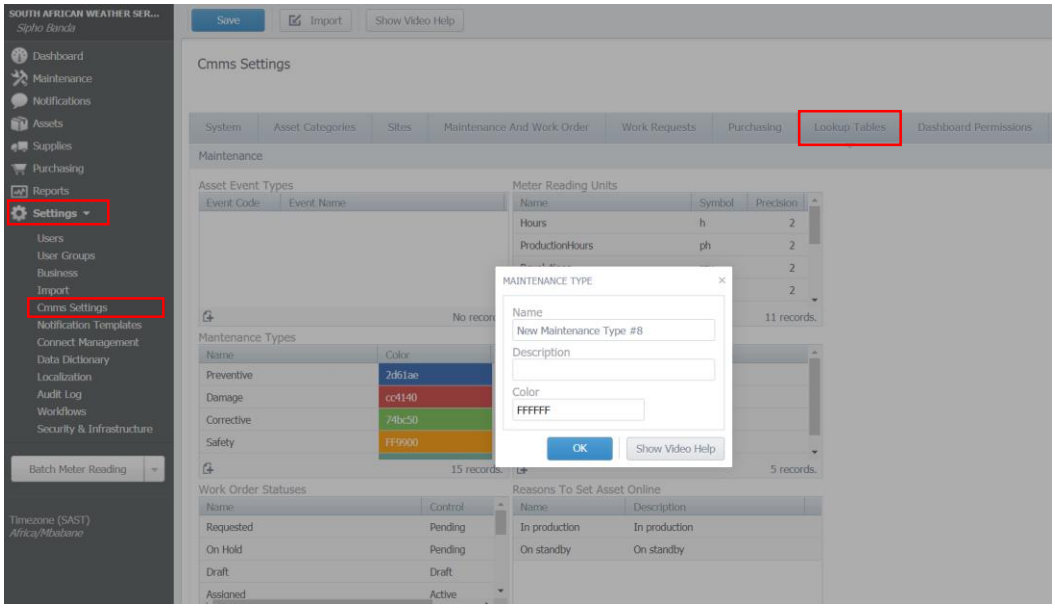
- Under API Permissions, select permissions then save.



2.2 Data Maintenance

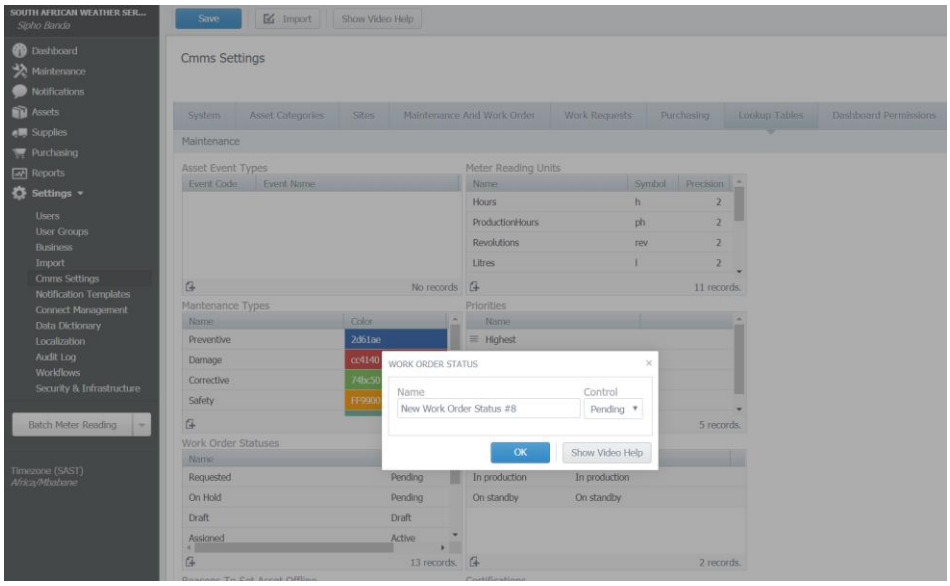
To update or add maintenance types

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



To update or add work order statuses

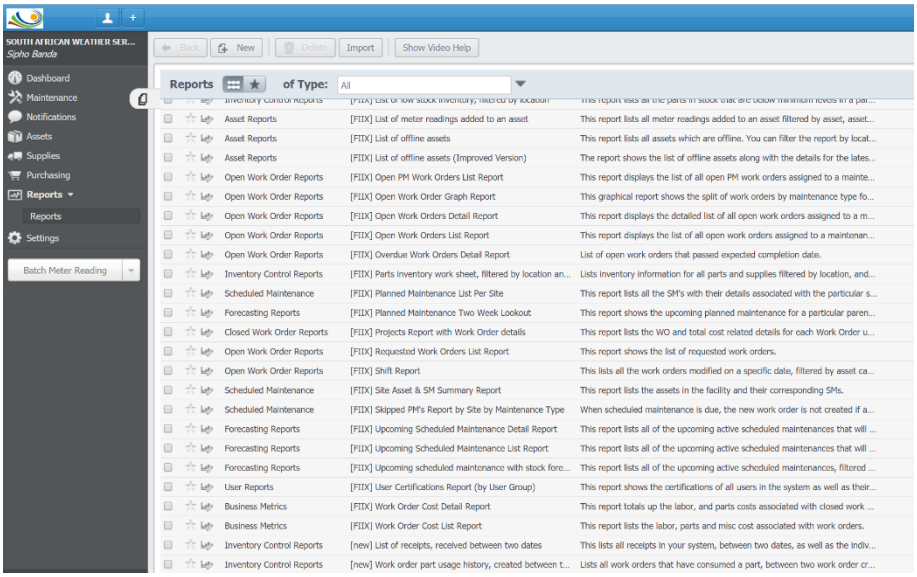
- Go to Settings > Cmms Settings > Lookup Tables then click the add button on work order statuses table. Enter the name and description.



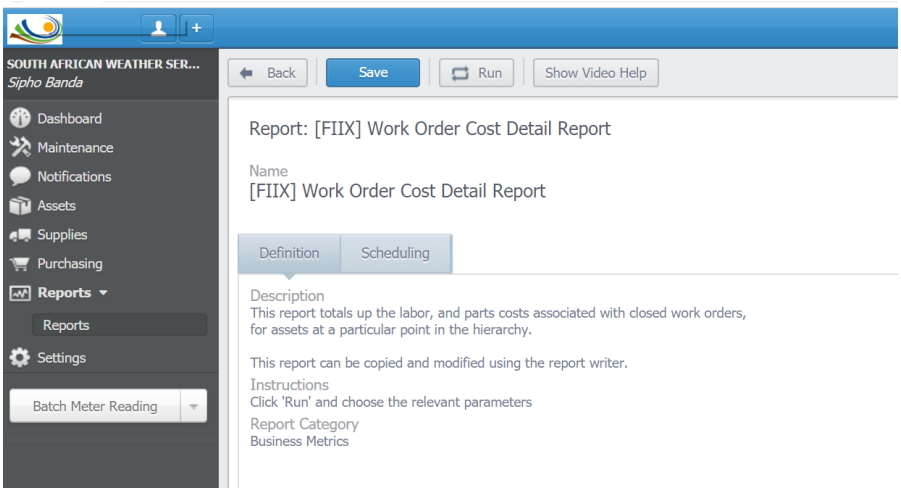
2.3 **Reports**

To run a Work Order Cost Detail Report:

- Go to Reports > Work Order Cost Detail Report

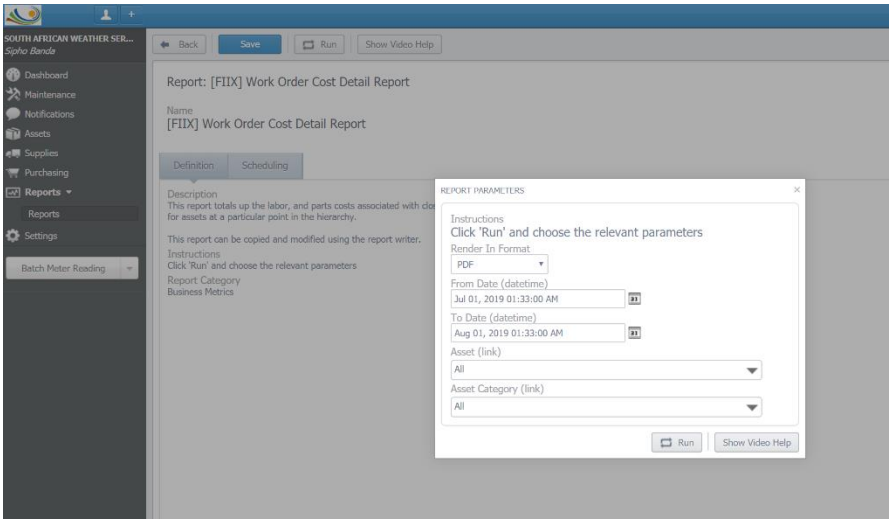


- Click the Run button.



- 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

[FIIX] 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