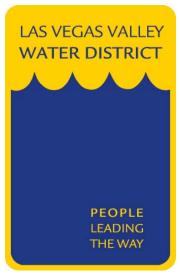
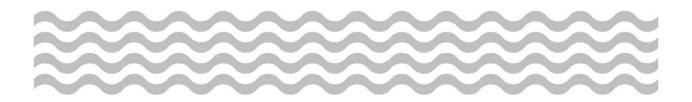




Southern Nevada Water Authority





Work Request Inquiry

LVVWD /SNWA

Avantis 4.2

Maintenance

Training Manual



Module / Topics



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Introduction

This training manual is designed for LVVWD / SNWA personnel who are responsible for monitoring the status of Work Requests. The manual is meant to be used as both a training resource and a reference guide on how to use the Avantis system to search for and view Work Requests.

Your comments and suggestions on how to improve this training manual are encouraged.

Purpose

A Work Request is the document used to request work from one of the LVVWD / SNWA maintenance divisions. Most Work Requests will eventually become Work Orders. Before a Work Request is converted to a Work Order, however, LVVWD / SNWA personnel may want to periodically check on and monitor maintenance Work Requests for their department. This training manual will demonstrate how Work Requests can be viewed and monitored.

Objectives of this Manual

Upon completion of this manual, the user will be able to:

LOGIN to Avantis

SELECT the LVVWD Work Request Cabinet

USE the Prompted Filter Details Dialog Box

SELECT a Work Request from the List

BROWSE the Work Request

REVIEW other Work Request Views





1. Starting Avantis and Selecting a Work Request

To work with the Avantis asset management software, you must use your assigned **Login name** and **password**. After login you should select your department specific **Desktop**. Then you should open your department **Work Request Cabinet**.

When you select your department **Work Request Cabinet** the **Prompted Filter Details Dialog Box** will open. This screen allows you to choose search options based on several conditions. Then, only those Work Requests, matching those conditions, will appear in the Work Request Cabinet.

From the list, which appears in the **Work Request Cabinet**, you can then use different methods to open a **Work Request** for viewing.

Objectives of this Module

Upon completion of this module, the user will be able to:

Login to Avantis

Selecting the Work Request Cabinet

Using the Prompted Filter Details Dialog Box

Selecting a Work Request From the Work Request Cabinet





Login to Avantis

Only authorized users are allowed to use Avantis so, when you launch the application, you are required to login. The **Login name** field will default to the same name as your network login. If this is correct then press the **Tab** key to move to the **Password** field and enter the password assigned to you. Then click the **OK** button to continue.

- 1. Enter your Login Name and Password in the Avantis Asset Management Login Information window.
- 2. The fields for **Environment**, **Site** and **Language** are set by default, based on your sign-on, and should not be changed.

Login information 1. Enter password Login name: SULLIVANT Password: Cancel Password: 3. Click the OK button Environment: Production Site: LVVWD&SNWS Language: English Site: English Vantis® is a registered trademark of Invensys Systems, Inc, its subsidiaries and affiliates. All other brands may be trademarks of their respective owners. This program is protected by US and international copyright laws as described in Help About.	Figure 1 – Avantis Login Screen

3. Click the **OK** button.

NOTE: If you already have Avantis open and have used other options, you will not have to login a second time.





Selecting the Work Request Cabinet

After logging in, Avantis displays the **Desktop** screen which consists of a series of **Tabs** containing **Icons** representing department specific **Cabinets**. Each division has its own version of the Desktop and Avantis remembers which Desktop you last worked with.

(If you need to change the Desktop, click the **Desktops**... button and select from the list that appears.)

- 1. From your department **Desktop** screen, select your department specific **Maintenance Cabinets tab**.
- 2. Double-click the Work Request Cabinet icon to open your department Work Request Cabinet.

🐥 PROD Desktop - Avantis Asse	1. Select your department specific Main t Management	tenance Cabinets tab		
Customization Maintenance Value OPS Entity Search OPS Open WO Search OPS Triggered PM WOs OPS Work Request Search PM Forecasting Only - Tele PM Forecasting Only - Tele PM Forecasting Only - 4111 PM Forecasting Only - 4115 PM Forecasting Only - 4118 PM Forecasting Only - 4118 PM Forecasting Only - 4119 PM Forecasting	Production Tasks Standard Activity Lists Cabinet	Production Maintenance Cabine Statistics Reading Log Tele Triggered PM WOs Telemetry Tasks Trigger PM	5	Figure 2 – Maintenance Cabinets Screen
		Dpen Desktops	Close	





Using the Prompted Filter Details Dialog Box

When the **Work Request Cabinet** opens, Avantis displays the default **View**. This view may contain a list of hundreds, or even thousands, of Work Requests. The length of this list may make it difficult to work with, and challenging to find the specific Work Request that you wish to display.

To allow the display of only a limited number of Work Requests, the **Prompted Filter Details** dialog box will automatically appear each time you open a View. This screen allows you to choose search options based on several conditions. Then, only those Work Requests, matching those conditions, will appear in the list

(Each **view** of the **Work Request Cabinet** has a slightly different **Prompted Filter Details** dialog box with different search options.)

	in the Entity number he Equal to field s with Ollowing E 3. The Entity Name Contains field	
Entity Name		
Level ID Contains:		Figure 3 – Prompted Filter Details Dialog Box
Created on		
Equal to:		
Range From:	4. The Created on calendar tools	
To:	at 😤	
Limit number of re		
5. Use the check box to the he number of rows to displa		
	6. Click the OK button to display the Work Request List	

- 1. If known, type in the **Entity Number** in the **Equal To** field.
- 2. If the Entity number is not known, use the Entity Search buttons (the Ellipses and Hierarchal buttons) to select the entity.





- **3.** To search for a Work Request by **Entity Name**, enter at least one word or number, which should be in the name, into the **Contains** field.
- **4.** To search for a work request by the date it was **Created on**, use the calendar tools.
- 5. Select the check box for Limit number of rows to, and then enter a number in the field that appears to the right. This will display only the number of rows you selected, in the Work Request Cabinet.
- 6. Click the **OK** button and a list of Work Requests displays.

NOTE: To search all Work Requests, leave all of the fields blank.





Selecting a Work Request From the Work Request Cabinet

The Work Request Cabinet displays a list of Work Requests based on the criteria selected in the **Prompted Filter Details** dialog box. From the Work **Request Cabinet**, there are three methods to open a Work Request:

- 1. From the list that appears in the **Work Request Cabinet**, find the **Work Request** you wish to display and click on it once to select it. Then do one of the following:
 - a. Click the **Open Selected Object** tool, on the toolbar.
 - **b.** Double-click the selected work request or its **Work Request I con**.
 - c. Click the **Selected** button to open its menu.
 - d. Choose the **Open As** option.
 - e. Select the General Information view.
- 2. The selected **Work Request** opens in its own window.

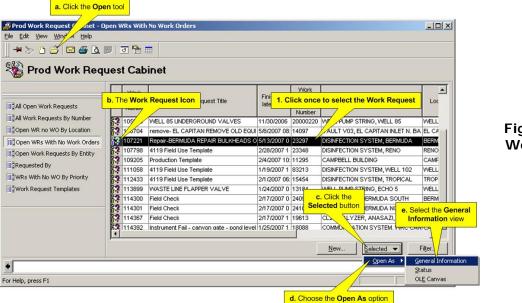


Figure 4 – The Work Request Cabinet

NOTE: If the Work Request has been turned into a Work Order, it is listed in the Work Request cabinet but cannot be modified.





Module 1 Exercise – Starting Avantis and Selecting a Work Request

In this exercise you will practice:

- Starting the Avantis program
- Opening your department specific Desktop
- Using the Prompted Filter Details dialog box to select a list of Work Requests
- Using different methods to open a Work Request
- **1.** Start Avantis and login using the following information supplied by your instructor:

Login name:	
5	

Environment:			

Password:

- 2. Open your department specific Desktop.
- **3.** Open your department specific Work Request cabinet.
- **4.** In the Prompted Filter Details dialog box do the following:

Use the Entity Search buttons to select Entity:

Search for Entity names containing: _____

Search for Entities created on: _____

- 5. From the Work Request Cabinet, open Work Request _____ by:
 - Double-clicking on the Work Request Icon
 - Using the toolbar
 - Using the Selected button





Module 1 Review

In this module you learned to:

- Start the Avantis program
- Open your department specific Desktop
- Use the Prompted Filter Details dialog box to select a list of Work Requests
- Use different methods to open a Work Request





2. Browsing the Work Request

When the **Work Request** window opens, you can select different **Views** which display different sets of information about the Work Request. The default **View** is **General Information**. Within the **General Information** View there are a series of **Tabs** containing specific information about the Work Request: **General**, **More Information**, **Keywords**, and **Categories**.

As each **Tab** is selected, you can display further information about the Work Request.

Objectives of this Module

Upon completion of this module, the user will be able to:

Browse the General Tab

Browse the More Information Tab

Browse the Keywords Tab

Browse the Categories Tab





General Tab

The **General Tab** displays general information about the **Work Request** such as the work request **Number**, **Name**, **Location**, **Description**, and **Priority**.

As each **Tab** is selected, you can choose to just display the data (all fields will appear gray) or, if you activate the **Allow Editing** tool, you can modify the entries (most fields will appear white).

The Allow Editing too	I <u>not</u> activated		
🔀 Work Reque	1 - General Informatio	on X	1
Eile Edit W Window			
📗 🖉 🏷 🗅 🎇 🥵	🕄 🖬 🛛 The Genera	al Tab	
🏶 107221 P	lepair-BF	JDA REPAIR BULKHEADS ON TANKS	
	General More Informa	ation Keywords Categories	
E General Information	Work requested for e	entity	
Re OLE Ca yas	Number:	過 23297	
Status	Name:	DISINFECTION SYSTEM, BERMUDA	
The General Information Vi	l nhealthr	Medium Impact on Production	Figure 5 – General
	Location:	BERMUDA	Information View
	Classification:	Disinfection	- General Tab
	Title:	Repair-BERMUDA REPAIR BULKHEADS ON	(Allow Editing
	Description:	Both NaOCL tanks at Bermuda need to have the one inch bulk head fitting removed for retaping, and reconnection. Make sure this is add to the 365 PM. This can be done when we clean the inside of the tanks.	Not Activated)
	Work type:	Reactive Maintenance	
	Priority:	Lvl 4-Fill in work	
	Start no earlier than:	11/14/2006 at 07:55	
	Finish no later than:	5/13/2007 at 08:55	
•	2	 ▶	
For Help, press F1		LVVWD85NW NUM //	





General Tab (cont.)

When the **Allow Editing** tool is activated, the fields that can be modified will become available for editing and appear white.

The Allow Editing to	ol activated		
Work Reque	1 - General Informatio	on>	1
Eile Edit Vir Window	Help		
🖉 🖉 🖄 🖉 🖉	🕄 🖬 🛛 The Genera	al Tab	
👋 107221 R	epair-BF	JDA REPAIR BULKHEADS ON TANKS	-
	General More Informa	ation Keywords Categories	
E General Information	Work requested for a	entity	
Re OLE Ca vas	Number:	④ 23297 L	
Status	Name:	DISINFECTION SYSTEM, BERMUDA	
The General Information Vie		Medium Impact on Production	Figure 6 –
	Location:	BERMUDA	General Information View
	Classification:	Disinfection	- General Tab
	Title:	Repair-BERMUDA REPAIR BULKHEADS	(Allow Editing
	Description:	Both NaOCL tanks at Bermuda need to have the one inch bulk head fitting removed for retaping, and reconnection. Make sure this is add to the 365 PM. This can be done when we clean the inside of the tanks.	Activated)
	Work type:	Reactive Maintenance	
	Priority:	Lvl 4-Fill in work	
	Start no earlier than:	11/14/2006 🔽 at 07:55 🛨	
	Finish no later than:	5/13/2007 🔽 at 08:55 🔆	
•		•	
For Help, press F1			





More Information Tab

The **More Information Tab** displays additional information about the Work Request such as the **Estimated Cost**, name of the **Planner**, **Requester information**, and when the Work Request was **Requested on**.

Work Request 107221	- General Inforn	nation				
<u>File Edit View Window</u>						
🛛 🖉 🏷 🗅 🏷 🏷	8 🖬 🖾 🎒	The More Informati	on Tab			
🏶 107221 Re	pair-BER		BULKHEA	DS ON TAP	NKS	
E	Details	formation Keywords Cate	gories		[
CLE Covas	Estimated cost: Planner:	 WOODWORTH, HAROLD	D			F 1
The General Information View	Requester inforr Requested by: Name: Telephone: EMail:	nation ALEXANDER, JAMES W ALEXANDER, JAMES W [258-3130 [iames.alexander@lvvwd.c	Ext.			Figure 7 – General Information View - More Information Tab
	Requested on:	11/15/2006	at 07:55			
•					*	
For Help, press F1				LVVWD8SNW		





Keywords Tab

The **Keywords Tab** displays keywords associated with the **Work Request**. This information can be used to easily categorize and search for specific groups of **Work Requests**.

Work Request 107221		_ 🗆 🗙	
🖉 🔊 🖒 🖉 🖉	Bepair-BERMUDA REPAIR & ULKHEADS ON TANK	s	
General Information	General More Information Keywords Categories Keywords to use for searching Keyword: Add Remove Bulkhead Repair Tank		Figure 8 – General Information View - Keywords Tab
•		•	
For Help, press F1	LVVWD8/SNW NL	UM ///	





Categories Tab

The **Categories Tab** displays the **Categories this object belongs to**. The most important category is the **Level ID**. This defines which department is responsible for the Work Request.

🔀 Work Request 107221	l - General Information			_O×	
<u>E</u> ile <u>E</u> dit <u>V</u> iew <u>W</u> indow	Help				
📗 🖉 🗞 🖒 🤞	3 🖬 🖻 🗃 🔛 🔯	🛿 🖥 🛛 🚺 The	Categories Tab		
🏶 107221 R	epair-BERMUD	A REPAIR BUL	EADS ON TA	NKS	
EGeneral Information	General More Information Categories this object bek Level ID: Job Code: Entity Class/Sub-Class:	Keywords Categories	4119 Disinfection/Reservoir Sh	1	Figure 9 – General Information View - Categories Tab
+				•	
For Help, press F1			LVVWD8SNW		





Module 2 Exercise – Browsing the Work Request

In this exercise you will practice:

- Activating and de-activating the Allow Editing mode
- Browsing the General Tab
- Browsing the More Information Tab
- Browsing the Keywords Tab
- Browsing the Categories Tab
- 1. Open the Work Request: _____
- **2.** Activate and de-activate the Allow Editing mode.
- 3. On the General Tab, what is the Priority: _____
- 4. On the More Information Tab, whose name is in the Requested by field:
- 5. What are 2 of the Keywords associated with the Work Request: _____
- 6. What is the Level ID: _____





Module 2 Review

In this module you learned to:

- Activate and de-activate the Allow Editing mode
- Browse the General Tab
- Browse the More Information Tab
- Browse the Keywords Tab
- Browse the Categories Tab





3. Other Work Request Views

The General Information View is the default View for the Work Request window, but there are other **Views** that contain additional information about the **Work Request**. These are the **OLE Canvas** and the **Status View**.

The **OLE Canvas** is a link to a **Microsoft Word** document that allows formatted information to be attached to the **Work Request**.

The **Status View** contains a series of **Tabs** that have updated information on what is the current situation of the **Work Request**.

Objectives of this Module

Upon completion of this module, the user will be able to:

View the OLE Canvas

Use the Status View





OLE Canvas

If the text to be entered in the **Description** field, of the General Information view, needs to be more than 2,000 characters, or simple diagrams are required, then the **OLE Canvas** View should be used instead.

OLE stands for Object Linking and Embedding. The object that will be linked or embedded to the **Work Request** is a **Microsoft Word** document. When working in the **OLE Canvas** View, all the features of Microsoft Word are available to you. You can type as much text as you need, use different fonts, use color highlighting, and even add simple diagrams.

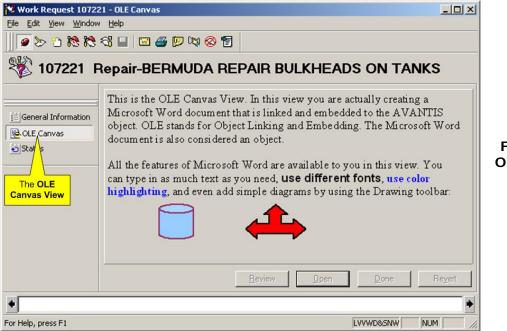


Figure 10 – The OLE Canvas View



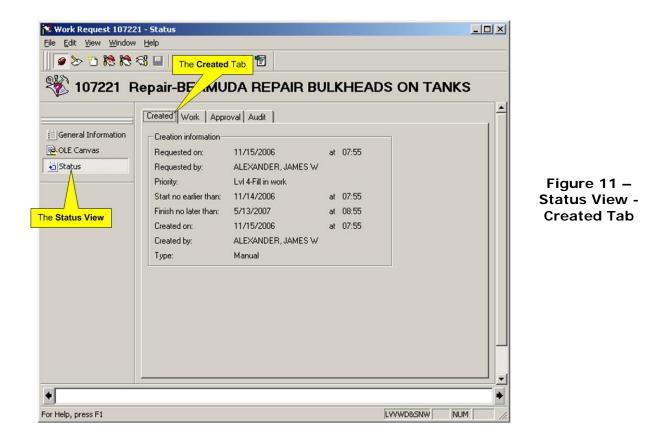


The Status View

Under the **Status** view, there are a series of **Tabs** containing specific information about the current situation of the **Work Request**. The **Tabs** are **Created**, **Work**, **Approval** and **Audit**.

Created Tab

The Created Tab displays information about when the work was Requested on, Requested by, and the Priority of the Work Request.







Work Tab

The **Work Tab** displays a table listing any **Work Orders** that have been created from the **Work Request**.

		×
E General Information	Created Work Approval Audit Work status Requested on: 11/15/2006 at 07:55 Completed on: Work linked to request Work Order Task Title Priority Status Supervisor Planner Selected *	Figure 12 – Status View - Work Tab
For Help, press F1	LVVWD8SNW NUM	h.

NOTE: To view a Work Order, double-click the Work Order icon and the Work Order window displays.





Approval Tab

The **Approval** tab indicates the approval history of the **Work Request**. The information includes when it was reviewed, who reviewed it, reason rejected (if applicable), and any approval comments.

1.00				
General Information	Created Work Approval Audit Approval information Approval status: Not applicable Reviewed on: Reviewed by: Reason rejected: Comments:	at		Figure 13 – Status View - Approval Tab
For Help, press F1		LVV	WD85NW NUM	





Audit Tab

The Audit tab is an electronic "paper trail" that lists the Date and Time of Change and the User Name for every change made to the Work Request.

	Created	Work A	pproval Audit			
General Information	Chan	ge History —				
OLE Canvas	No	Source	User Name	Date and Time of Change	<u> </u>	
Status	1	User	LITT, ROBERT F.	1/19/2007 09:15		
	2	User	LITT, ROBERT F.	1/19/2007 09:02		
	3	User	LITT, ROBERT F.	1/19/2007 08:59		
	4	User	LITT, ROBERT F.	1/19/2007 08:57		F :
Status View	5	User	WOODWORTH, HAROLD	11/17/2006 12:40		Figure
	6	User	ALEXANDER, JAMES W	11/16/2006 07:38		Status V
	7	User	ALEXANDER, JAMES W	11/16/2006 07:35		Audit





Module 3 Exercise – Other Work Request Views

In this exercise you will practice:

- Browsing the OLE Canvas
- Browsing the Status view, Created tab
- Browsing the Status view, Work tab
- Browsing the Status view, Approval tab
- Browsing the Status view, Audit tab
- 1. What information can be found in the OLE Canvas view of Work Request:
- 2. When was the Work Request Requested on:
- 3. What Work Order was created from the Work Request: _____
- 4. What is the Approval status: _____
- 5. Name 2 people who have made changes to the Work Request: _____





Module 3 Review

In this module you learned to:

- Start the Avantis program
- Open your department specific Desktop
- Use the Prompted Filter Details dialog box to select a list of Work Requests
- Use different methods to open a Work Request





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