

WORK ORDERS

Lesson Plan - May 15, 2023 version

By the end of the *Work Orders* course, the client and targeted users will be able to perform all the necessary configurations and actions to managing and using work orders in **maestro***.

Unit WORK01 - Preliminary Analysis and Configuration

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>The objective of this session is to clarify the needs, requirements, and conditions to using work orders and make the basic configurations that are linked to these in maestro*.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none">• General Ledger;• Project Management;• Security Management;• Accounts Receivable (standard). <p><i>OPTIONAL PREREQUISITES</i></p> <ul style="list-style-type: none">• Document Management;• Contact Management;• Time Management;• Order Management;	<ul style="list-style-type: none">• Analysis;• Configuration (Work Orders module).	<ul style="list-style-type: none">• Discuss the current and future processes to manage work orders (strengths and weaknesses);• Discussion on the types of transactions that can be entered in maestro* (specific cases);• Set up of the required configurations for the implementation;• Decision-making. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none">• Reflect on the discussions.	1h	<ul style="list-style-type: none">• Training document WORK01¹	Pilot

¹This training document is under development.

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<ul style="list-style-type: none"> • <i>Catalogue;</i> • <i>Requisitions;</i> • <i>Inventory;</i> • <i>Preventive Maintenance;</i> • <i>Work Order Quotations.</i> 					

Unit WORK02 - Set Up Work Orders

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to set and configure the necessary parameters to create, use, and manage work orders in maestro* .	<ul style="list-style-type: none"> • Define Priorities; • Define Zones; • Define Work Order Types; • Define Work Order Tasks; • Progress Management; • Define Sending Types; • Catalogue Management (if used); • Customer Discounts Table; • Define Quotation Types (if necessary). 	<ul style="list-style-type: none"> • Review previous concepts and validate tasks completed as homework; • Explanations and completion of the windows in maestro* linked to managing work orders, according to the client's needs and software requirements, to automate date entry. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • <i>Finalize data entry.</i> 	2h	<ul style="list-style-type: none"> • Training document WORK02¹ 	Pilot and/or Super Users

¹This training document is under development.

Unit WORK03 - Work Orders 101

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to perform the different operations linked to the work order cycles and processes in maestro* .	<ul style="list-style-type: none"> Work Orders: <ul style="list-style-type: none"> Direct Invoicing; Work Order Quotation (if required); Print Work Orders; Work Order Batch Transfer; Recommendations. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework; User training according to the process established at the time of the analysis; Explanations and completion of the windows in maestro*, linked to managing and using work orders, according to the client's needs and software requirements, to automate data entry; Explanation of the different possible transfers available; Explanation of the configuration windows. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Practice entering transactions;</i> <i>Test the approval process, if applicable.</i> 	3h	<ul style="list-style-type: none"> Training document WORK03¹ 	Pilot and/or Super Users

¹This training document is under development.

Unit WORK04 - Operational Training on Using Work Orders

Optional Session - Training of the client's employees with the implementation specialist

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will be able to perform the different operations linked to work order cycles and processes in maestro *.	<ul style="list-style-type: none">• Work Orders:<ul style="list-style-type: none">• Direct Invoicing;• Print Work Orders;• Work Order Batch Transfer;• Recommendations.	<ul style="list-style-type: none">• Review previous concepts and validate tasks completed as homework;• User training according to the process established at the time of the analysis;• Explanations and completion of the windows in maestro*, linked to managing and using work orders, according to the client's needs and system requirements, to automate data entry;• Explanation of the different possible transfers available;• Explanation of the configuration windows. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none">• Practice entering transactions;• Test the approval process, if applicable.	3h	<ul style="list-style-type: none">• Training document WORK03¹	Pilot Super User and/or Users

¹This training document is under development.

Unit WORK05 - Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and identified users will be able to use the maestro* report and analysis tools to find the information they need to manage work orders.	<ul style="list-style-type: none"> Project Inquiry; Work Order Inquiry; List of Work Orders; Invoicing Analysis (W/O); Work Order Report; Work Order Gross Margin; Work Order Review; Work Order Accrual Report; Work Order Accrual Report and Export. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework; Validate reports and inquiries. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Validate data entered in maestro*. 	2h	<ul style="list-style-type: none"> Training document WORK05¹ 	Pilot Super User and/or Users

Unit WORK06 - Form Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson the client will be able to use the standard maestro* forms defined to meet their needs.	<ul style="list-style-type: none"> Work Orders (according to the work order type); Work Approval; Quotations Work Orders. 	<ul style="list-style-type: none"> Review previous concepts and validate tasks completed as homework; Adjust standard maestro* forms to print preset forms with the company's image. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> Validate the accuracy of the forms. 	To be Determined		Pilot

¹This training document is under development.

Unit WORK07 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client and designated users will have carried out the tests and verifications to validate the configurations made beforehand, and will be able to attest to the adequacy of these configurations with the established processes.	<ul style="list-style-type: none">• Validation of Workflows;• Validation of Reports.	<ul style="list-style-type: none">• Review previous concepts and validate tasks completed as homework;• Assist with tests;• Validate transactions;• Validate reports and inquiries;• Review configurations, if needed;• Review processes, if needed. <i>HOMEWORK</i> <ul style="list-style-type: none">• <i>Complete Integrated Tests.</i>	45 min.		Pilot Users

Unit WORK08 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this training session, the client will have shown they possess the necessary skills and knowledge to use and manage work orders in maestro* .	<ul style="list-style-type: none">• Validate learnings;• Review the security settings applied to the module.	<ul style="list-style-type: none">• Prepare the next training sessions:<ul style="list-style-type: none">• Work Order Dispatch;• Invoice Preparation (W/O);• MOBILE - Service;• Preventive Maintenance.	15 min.	Acquired competencies form - WORK^I	Pilot

^IThis training document is under development.