ShireSystem

ShireSystem Super User Training Course

The Super User Course is designed for System Administrators who will be responsible for setting up and maintaining the system.

This will contain elements of the Maintenance User Course however; it will look at the modules in more detail. The course will include Mobile Pro, Requester, and Resource Planner. All extra features of the course will have live demonstrations and will allow users to have a glimpse and try out modules that they might not be aware of.

Course Objectives

The ShireSystem Super User Course is an intensive three-day training programme tailored for system administrators responsible for implementing and maintaining ShireSystem within their organisation. It covers both fundamental and advanced features,from navigating dashboards and managing assets, workflows, contacts, and scheduling tools, to utilising modules like Work Requester, Mobile Pro, Resource Planner, and Wallboard.

The course is designed to empower participants to build and fine-tune their ShireSystem installations effectively, helping them avoid common pitfalls and optimise maintenance processes to extract maximum value from the system.

Duration

This is a three-day course.
The course runs at a pace that allows time for practical exercises and questions.

More information

Audience: System administrators, senior maintenance managers

Delivery: Classroom I Online

Prerequisites: A basic level of Windows PC usage

CPD Accreditation: 6 hours

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ShireSystem

Topics included in the Super User training course.

Day 1

Navigation of the system
- General overview of the system to familiarise the user with the icons.

Dashboard
- Demonstrate a snapshot of the business status at that moment in time.
- Create a graphical representation for ease of viewing.

Locations
- Create a Location structure.
- Search the Location Tree and work from the Location Tree. This also includes amending any mistakes.
- Reset the status of active locations to inactive.
- Searching for inactive locations and how to reinstate them if applicable.

Assets
- Explore asset content and provide information on how it can be populated. This will help with reporting and linking fields to the Lookup table.
- Search/Background data in Lookups/Create.
- Create and clone an Asset.

Attributes
- Attributes and discussion of where they can be used and viewed.
- Creating attributes and understanding how they are constructed.
- Demonstrate how to search for an attribute within an asset.

Work orders (breakdowns)
- Explanation of the work list
- Navigating the Work Order to aid understanding of where the info comes from (relating this back to the asset).
- Creation, process (adding parts/labour), and sign-off,
- Reiterating the importance of the data required on a Work Order and how this feeds into the reporting tool.
- Practice creating Work Orders and signing off in different situations e.g., Quick sign off, Sign off.

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Day 2

Contacts
- Add contacts (Suppliers, Contractors, employees) with all relevant information required for an individual/company.
- Create user accounts.
- Review permissions, granting access to areas of ShireSystem.

Tasks
- Create and schedule a Task.
- Discuss the options for Manual/Automatic tasks.
- Review all the information added to a task and how it works on a Work Order.
- Clone to create a Minor Task and schedule it (including minor task suppression).
- Observe how the tasks are viewed on Scheduler.

Scheduler
- Navigation and control.
- Right-click function within Scheduler.
- Work Order generation (Discuss Automatic and Manual generation differences).
- How to read and understand the scheduler benefits.
- Creating a Work Order and general management of the scheduling screen.
- Empasis the link between Task creation and the Scheduler.

Work Requester
- Explain how engineering and non-engineering staff can create Work Requests. (Critical and Non-Critical)
- Demonstrate how Work Requester links into the Work Order screen and how to reject and approve requests.
- Approve, reject, and designate Work Orders
- Auto send e-mails – set up option.

Mobile Pro
- General overview of the working of Mobile Pro.

Resource Planner
- Overview of the information displayed, views, right-click options, and future views.
- Explain how to view Work Orders in different ways e.g. by Engineer, Location, Closed
- Demonstrate how to manage Work Orders and plan Engineer's time e.g., shift pattern creation.

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Day 3

Meters
- Explain the 4 types of meters and their uses.
- Create a meter and attach it to an asset.
- Explain how to create a regime for a meter, (using Tasks)
- Create a meter route, create the task, generate the job, and sign off.

Work Subject Groups (Fixed/Category)
- Explanation of the differences between Category and Fixed Work Subject Group.
- Explain how to create both a Category and Fixed Work Subject Group.
- Within the Work Order screen review the differences between a single and a multi-asset task.
- Signing off a Work Subject Group.
- Analyse the history of the Work Subject Group within an affected asset.

Settings
- Explain General Settings. How they are set up in the system and run to the business requirements.
- Demonstrate System Settings
- Show Setting on the Home Page menu.

Branding Toolkit
- Demonstrate how to set the logo
- Use the company logo on Reports.
- Set up the login screen with images and information relevant to the company.

Documentation
- How to organise documents – private and shared
- Adding folders and subfolders, 30-day expiry.
- Attaching via Asset, Location Task, etc

KPI Scoreboard
- Review the KPI module, and navigate the screen.
- Demonstrate how to create the Grid, Bad Actor, and Gauge.
- Explain how the info is collated and the importance of the setup to get the data. An additional KPI reporting suite works in parallel to the module.

Reports
- Overview of report module.
- Show how to run a report using the filter options.
- Export a report to Excel.
- Discuss how the Lookup tables impact the reports and the importance of good data.

Wallboard
- Overview of how the module works.
- Outline of how to set up.

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