

# Configuration Worksheet - SD

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The Configurator is a flexible software tool designed to allow for the creation of unique and in-depth bills of material, sales orders, or repair orders based on a series of questions and answers. The configurator guides the user through the question and answer process such that the end result could be a sales order configuration consisting of multiple line items, a single line item representing a bill of material, or a repair order.

The heart of the Configurator is the Configuration Maintenance function. The configuration maintenance function creates a series of questions and responses that drive the item setup, repair, or inspection. This setup function is where the real work needs to be done.

The TRAVERSE Help for the Configurator sample configuration setups follow this worksheet. Use this worksheet to plan your configuration before you enter it into the system.

This worksheet is intended to help you set up a configuration for inspections and repair orders.

## Planning - Stage 1

The first step in creating a repair or inspection configuration is defining what you want to configure. Before making any entries into the system for your configuration, you need to plan what you want to repair or inspect, the options you will present to the user, and the pricing scheme you want to use for the completed configuration.

### **What can the user configure?**

List the general areas or levels of the configured repair or inspection the user must progress through, such as visual, electrical, first stage, second stage, and other choices that determine other options. For example, if the configured repair is for a motor, the user might clean the part, visually inspect the drive shaft, test the bushings/bearings, measure resistance, inspect the mounting flange, or replace the brushes.

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**What is included in the inspection or repair?**

List the items that are required to be included in the inspection or repair. These should be items that are always replaced or repaired. For example, if you always replace the seal on the drive shaft or replace brushes no matter what the test results are.

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**Do any of the components depend on choices the technician makes?**

Often a choice a technician makes determines available options further into the inspection process. For example, if a technician indicates the output voltage or amperage is lower than a threshold, s/he might be presented with questions regarding the resistance of rectifiers, condition of the armature, or brush wear.

List components that are included or excluded depending on what the technician chooses in a previous question.

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**How do you want to price the inspection or repair?**

The Configurator offers many options for pricing, from one blanket price to components in which the inventory price is overridden or superseded..

- Straight inventory pricing--the prices of any added inventory items are added together for the final price
- A base price plus individual pricing for any additional items--if your base price comes from the configuration, determine a default price
- A blanket, or fixed (default), price that does not change no matter what components are selected.
- A combination of inventory and configuration pricing, with or without formulas.

**Other things to consider:**

- Do you want the system to assign an item number for the inspection (Auto), or do you want the item number to reflect some or all of the characteristics of the item (Smart ID number)?
- Will the description and additional description of the final inspection change depending on the components the user chooses?
- Are there any requirements determined by the components the user chooses? For example, if the user performs a particular test, is there a min-max limit to the resistance or the output for that motor? List restrictions as applicable.

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## Planning - Stage 2

Stage 2 planning consists of laying out the options for each line on the repair order or inspection, as well as listing the items that are included but not specified by the technician.

List the line items and the options available. For example, if the line item is regarding the condition of the brushes, the available options might be new, average, worn, or needs replacement.

**Inspection/Repair Order line item:**

**Options available**

**Sample:** Drive type

Gear, pulley, direct


List the items that are required to be included in the inspection or repair. These should be items in which the technician has no choice or option. For example, if the technician finds a worn or cracked pulley, items that must be included might be the replacement pulley, key, lock ring, and nuts.

**Item to inspect/replace**

**This must be included**

**Sample:** Drive pulley

Pulley, key, lock ring, nut

**Sample:** Bushing

Grease lubricant

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List components that are included or excluded depending on what the technician chooses or enters in a previous question.

**If technician enters this**

**This must be included/inspected**

**Sample:** Conduit box – External

Cover, lock washers, screws

**Sample:** Seal leak - yes

Inspect bearing, inspect housing, replace seal

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## Setup – Inventory Items

Before you start a new configuration, make sure all the component items that may be used in the inspection are set up as Inventory items. Verify pricing if the inspection will use inventory pricing.

## Setup – Configuration Categories

Before you configure a new inspection, make sure you have created the configuration categories you want to use for the inspection. Configurator categories allow you to group the inspections you create.