



## **SCOPE OF SUBJECT MATTER**

The aim of **Certified Production and Inventory Analyst** training is to provide the foundation skills and knowledge in production and inventory management.

Certified Production & Inventory Analyst is designed to help you develop an understanding of the formation of business, the planning & scheduling of operations, the management of company resources, and the alternate manufacturing strategies:

- Introduction to Manufacturing and Operations Management
- Operations Planning and Scheduling
- Materials Management
- Manufacturing and Manufacturing Processes
- Manufacturing and Operations Support **Functions**

## **Exam Diagnostics**

1	Introduction to Manufacturing and	
_	Operations Management	10%
2	Operations Planning and Scheduling	15%
3	Materials Management	25%
4	Manufacturing and Manufacturing	
	Processes	30%
5	Manufacturing and Operations	
	Support Functions	20%

## **Program Outline**

The following paragraphs provide an outline of the subject matter covered in the program. The learner should read through the material, keeping in mind the exam diagnostics in relation to the emphasis placed on each module.

Each module includes a number of worked examples and exercises.





## **MODULE 1**

## INTRODUCTION TO MANUFACTURING AND OPERATIONS MANAGEMENT

## **Course Outline**

- 1.1 Business Formation and Business Strategy
- 1.2 Business Functions and Activities
- 1.3 Management
- 1.4 Supply Chains and Customer Service

## **Learning Outcomes**

- Name the objectives a business would establish for its operations;
- Distinguish between unincorporated businesses and incorporated businesses; give examples of each;
- Name the four primary functions of management; provide a brief explanation of each function;
- Define supply chain and supply chain management; with the aid of a diagram, show how demand, supply and information flows through the supply chain;
- Distinguish between the roles of strategic, tactical, and operations planning in supply chain management;
- Name the four leadership styles and give examples of where each leadership style would be the most appropriate;
- Define customer service; explain the importance of customers to a business;
- Outline the steps to be taken to ensure a successful communication process both within an organization and with the outside world.

## **Exam Content**

This module outlines Business Formation and Strategy and introduces the various forms of business formation, distinguishing between incorporated businesses and unincorporated businesses, while examining the advantages and disadvantages of each.

The module reviews the purpose of a business strategy and examines the role of the vision and mission statement in formulating a business strategy. The various organization structures are explained, and a number of business functions and activities are outlined.

The module examines Management, Supply Chain, and Customer Service and introduces the role of management, the structure of the supply chain, and measures of customer service. The role of management is examined and the four management functions are outlined while distinguishing between line, function, and staff relationships.

The structure of the supply chain is outlined and a description of what a supply chain is and how a supply chain is used to improve company performance is examined. The importance of customers and customer service is emphasized and a distinction is made between internal customers and external customers.



# MODULE 2 OPERATIONS PLANNING AND SCHEDULING

## **Course Outline**

- 2.1 Forecasting and Demand Management
- 2.2 Planning and Scheduling
- 2.3 Materials Planning
- 2.4 Capacity Planning

## **Learning Outcomes**

- Distinguish between qualitative forecasting techniques and quantitative forecasting techniques;
- Explain the importance of tracking forecast error and making adjustments to a forecast when demand exceeds forecast by a large degree;
- Compare long-range, medium-range, and short-range planning; give examples from each category;
- Distinguish between planning and scheduling; with the aid of examples describe a number of planning and scheduling tools;

# Give a description of the master scheduling process;

**SCHEDULING** 

- explain the role of rough-cut capacity planning in master scheduling;
- Give the purpose of materials planning and capacity planning in a manufacturing environment;
- With the aid of a flow diagram, give an explanation of the materials planning process;
- Give an explanation of how capacity planning is used to balance load with capacity at one or more work centres.

## **Exam Content**

This module examines Planning, Forecasting, and Scheduling and explains the roles of planning, forecasting and scheduling in a manufacturing environment.

The module distinguishes between long-range, medium-range, and short-range planning; examining the component parts of each.

The role of forecasting and demand management in a manufacturing environment is outlined and a number of different forecasting techniques are reviewed. A distinction is made between planning and scheduling and a number of scheduling tools are examined.

Master scheduling and the role of master scheduling in a manufacturing environment is explained, along with a description of how rough-cut capacity planning is used in master scheduling.

Material and Capacity Planning is explained in manufacturing and the greater supply chain. The material requirements planning process is described and a range of different bills of material formats is examined.

The capacity planning process is examined with an explanation of how capacity and load are balanced at each stage in the priority and control hierarchy. Different productivity and capacity measures are examined.

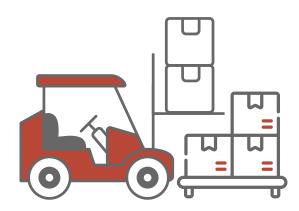




## MODULE 3 MATERIALS MANAGEMENT

## **Course Outline**

- 3.1 Purchasing, and Warehousing
- 3.2 Inventory Management and Materials Handling
- 3.3 Transportation and Distribution



## **Learning Outcomes**

- Define materials planning; give the role of materials planning in the supply chain;
- Describe the purchasing cycle; outline the requirements when selecting a supplier;
- Give the role of warehousing in the supply chain; describe a number of warehouse activities;
- Explain what inventory is, and why it is necessary to hold inventory at various points along the supply chain;
- Distinguish between the various types, functions and costs of inventory; give examples from each, outline the importance of managing each;
- Name and give an explanation of each category of materials handling equipment;
- Discuss the role of transport and transportation in the distribution of goods to customers;
- Explain the process of physical distribution; distinguish between carriers and the modes of transportation;

## **Exam Content**

This module examines Materials Management and outlines the role of materials management in manufacturing and the greater supply chain. Purchasing is discussed with the role of purchasing and the purchasing process is explained.

Warehousing in the supply chain and the importance of effective warehouse practices is examined. Different categories of warehouse are reviewed along with the advantages and disadvantages associated with each.

The process of inventory and inventory management is examined and a distinction is made between the types and functions of inventory. The importance of managing inventory and inventory costs is explained. Methods of managing inventory are outlined.

Materials handling and materials handling equipment is examined and the role of materials handling and storage equipment in the warehouse and distribution explained.

Transportation is examined with an explanation of freight management and the different modes of transport in moving goods through the supply chain is explained.

Physical distribution in the supply chain is examined, and an introduction to protective packing is given.

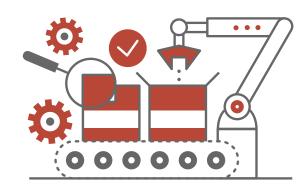
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# MODULE 4 MANUFACTURING AND MANUFACTURING PROCESSES

## **Course Outline**

- 4.1 Manufacturing and Technology
- 4.2 Manufacturing Strategies
- 4.3 Types of Production
- 4.4 Manufacturing Processing, and Manufacturing Materials



## **Learning Outcomes**

- Name the major groups of knowledge in business; give a brief explanation of each;
- Name and give a brief explanation of each of the components of a representative technological transformation system;
- With the aid of a diagram, give an explanation of the volume-variety matrix;
- Explain the importance of teaming up with suppliers and customers at each level in the supply chain;
- Distinguish between primary sector industries, secondary sector industries and tertiary sector; give examples from each sector;
- Name the different types of production systems; give examples of the products produced by each;
- Name the manufacturing processing families; indicate the significant differences between them;
- Distinguish between engineering materials and non-engineering materials; give examples from each category.

## **Exam Content**

This module examines Manufacturing and Manufacturing Strategies and introduces the field of manufacturing, giving an explanation of each manufacturing strategy.

The module outlines the major groups of knowledge, and the role technology plays in manufacturing. The elements of technological systems are explained and a distinction is made between the various types of technological systems.

The module outlines the manufacturing strategies and differentiates between the product positioning strategies and process strategies. The steps for teaming up with customers are examined and a number of management support functions is outlined.

The Types of Production and Production Materials is examined and the different types of production along with a range of manufacturing materials is discussed.

Manufacturing inputs, processes and outputs for different types of production are explained and a distinction between primary, secondary and tertiary industries is outlined.

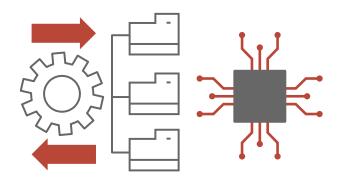
The module outlines a range of manufacturing processes and distinguishes between the different materials used in manufacturing.



# MODULE 5 MANUFACTURING & OPERATIONS SUPPORT FUNCTIONS

## **Course Outline**

- 5.1 Industrial Engineering and Productivity Improvement
- 5.2 Quality, Inspection, Metrology, & Maintenance
- 5.3 Lean and Waste Management
- 5.4 Continuous Improvement



## **Learning Outcomes**

- Explain the role of industrial engineering in a manufacturing environment;
- Define productivity; name the resources, and discuss how productivity influences the wealth of a nation;
- Name the component parts of work study; briefly describe the procedure for a work study investigation;
- Distinguish between quality, inspection, and metrology; explain why quality is everyone's responsibility?
- Name and give a brief explanation of the types of plant maintenance activities in a manufacturing organization;
- Describe the lean process; explain how lean is used to increase the productive use of a company's resources;
- Identify the types of waste; give examples of each waste from the workplace;
- With the aid of sketches, give an explanation of the seven basic quality tools; give one example of the application of each.

## **Exam Content**

This module examines Industrial Engineering Support and introduces a range of industrial engineering support activities necessary for the successful operation of a manufacturing company.

The role of productivity, work study, and ergonomics in improving the productive use of a company's manufacturing resources is discussed, with example given on how to increase productivity utilizing work study and ergonomics.

The module examines the role of quality, inspection, metrology and planned maintenance in manufacturing, and examines how each is utilized in the providing quality cost-effective goods and services.

The module examines Lean, Waste, and Continuous Improvement and introduces the key components of lean, waste, and continuous improvement. Lean and lean thinking is examined, outlining how lean can be used to improve the productive use of a company's limited resources.

Different forms of waste [muda] are identified and a number of suggestions on how to minimize waste in the value chain are given.

The module introduces the process of continuous improvement and describes a number of different quality tools and continuous improvement techniques.

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## **KEY TERMS**

Learners wishing to achieve the certification in "Certified Production and Inventory Analyst" should familiarize themselves with the following terms. The glossary of Term accompanying this program provides an explanation of each term.

### 1-10

5S-CANDO 7+1 wastes

## Α

ABC classification
Accounting
Action messages
Allowances
Articles of Association
As-built bill of material
Assemble-to-order
Assembling processes
Autocratic leader

## В

Backlog
Bill of materials [BOM]
Bill of material structure
Bill of resources
Breadboard model
Business goals
Business culture

### C

Capacity requirements planning [CRP] Capital Carrier Casting and molding Categories of inspectors Ceramic materials Chain of suppliers Channels of distribution Chase production planning strategy Comfort zone Commercial waste Communications Companies Act Competition Competitive market Composites Conditioning processes Conformance to specification Continuous improvement Continuous production systems

Contract warehouses
Control equipment
Controlled waste
Controlling
Corporate strategy
Cumulative lead-time [CLT]
Custom designed
Customer base
Customer service levels [CSL]
Cycle counting

## D

Decision-making Deed of partnership Defect (S) Defect waste Degree of control Demand Demand forecasting Demand management Democratic leader Demonstrated capacity Descriptive studies Desian Dictator Directive waste Distribution Distribution inventories Doable schedule

### Ε

Efficiency
Employee empowerment
Employees involvement
Employees
Engineering
Engineering materials
Engineer-to-order [ETO]
Environmental engineering
Equipment productivity
Ergonomic improvements
Ergonomics
Exception messages
Extension strategies
Extra processing waste

## F

Fabrication

Factory planned orders

Feedback loop Ferrous metals Final assembly schedule [FAS] Finance Financial incentives Finishing processes First-off Fitness for purpose Fixed-position layout Flow-shop Focus forecasting Forecasting For-hire carriers Forming processes Form utility Fourth-party logistics provider [4PL] Free-reign leader Functional layout

## G

Galvanizing

General public

General-purpose equipment
Global market
Goal-management
Goals
Goods
Goods
Goods availability
Goods' receiving process
Gross requirements

Functions of inventories

### н

Handicraft era
Health and safety
Health and safety engineer
Household waste

Human capital Human factor engineering Humanities Hybrid production planning strategy

### П

Incorporated businesses Indented bill of material Industrial engineering Industrial engineers Industrial Revolution Industrial waste Informal organization Information Inorganic materials Input-output control Input-output report Inputs Inspection Inspection activity Inspection stations Intermittent production Inventory Inventory management Inventory record accuracy Inventory waste Item Item data

## J

Jidoka Job production Job relatedness Job satisfaction Job shop

Item record

### K

Kaizen Kanban Key performance indicators [KPIs] Knowledge

### L

Labour productivity Leading Lean initiatives Lean philosophy Legal identity Level production planning strategy Levels of inspection Limited [Ltd] company Limited liability Liquid assets Load profile Logistics Long-range planning

## M

Machines Maintenance Make-to-order [MTO] Make-to-stock [MTS] Management functions Management processes Manpower

Manufacturing Manufacturing inputs Manufacturing inventories Manufacturing lead-time [MLT] Manufacturing outputs Manufacturing processes Manufacturing [producer] environment

Manufacturing team

Marketing Market niche Mass production

Master production schedule [MPS]

Master scheduler Master scheduling Material flow cycle Material planner

Materials planning process Material requirements planning [MRP]

Materials handling equipment [MHE]

Materials management Medium-range planning Memorandum of Association

Metallic materials Metrologist

Mixed-model scheduling

Modes of transport Motion waste MRP record Multi-skilling Multi-tasking

Negative feedback Net requirements Nonferrous metals Non-financial incentives Not-for-hire carrier

Observed time Occupational Health and Safety Administration [OSHA] Off-the-shelf Open data models Open order status Operations research [OR]

Order cycle Organizations

Original equipment manufacturer [OEM]

Outputs

Overproduction

Owners

Packaging materials Packaging waste **Partners** 

Part number PDCA cycle

Performance measures Periodic stocktake

Personal protective equipment [PPE]

Place utility Planning Planning factors Planning horizons Plant maintenance

Polymeric materials Positioning equipment Primary material input

Principles of lean production Private sector companies

Private warehouses Process engineering

**Processes** Processing logic Process layout Process production Process strategies Product development Product engineering

Production

Production activity control [PAC]

Production planning

Production planning and control [PPC]

Production planning strategies

Productive resources

Productivity Productivity people Productivity ratio Productivity trends Product layout Product mix

Product positioning strategies Product-process matrix

Product volume Profitability

Proprietary limited [Pty] Ltd.

companies

Protective packaging Public sector companies Public warehouses

Purchase planning and control

Purchasing

Purchasing cycle

Quality assurance [QA] Quality circles [QCs] Quality control [QC]

Quality control and inspection

Quality management

Quality of work-life [QWL]

R

Rated capacity Recycling

Resource planning

Resources

Relaxation allowances

Rough-cut capacity planning [RCCP]

Routing file

S

Scheduled receipt Scheduling rules Science

Secondary processing

Self inspection

Separating processes

Seven basic quality tools

Seven wastes

Shareholders

Shop calendar

Short-range planning

Single-level bill of material

Single-minute exchange of dies

[SMED] SKU

Societal goals

Sole proprietor

Special category warehouse

Specialization

Special-purpose equipment

Special waste Specification

Standardized work

Standard operating procedures

[SOPs] Standards

Standard time

Storage equipment

Strategic decision-making

Subassembly

Subcontract

Subcontracting production planning

strategy

Summarized bill of material

Supplier relationships Supplier selection

Supply pipe

Support functions

Swarf

System goals

Systemic errors

Tactical decision-making

**Targets** 

Technology

Technology systems

Third-party logistics provider [3PL]

Theoretical capacity

Time-based maintenance

Time-span

Time utility

Total quality management [TQM]

Transformation process

Transportation

Transport company

Transport equipment

Transport waste

Tree structure

Types of ergonomics

Types of inventory

Under-utilized people waste

Undesirable outputs

Unincorporated businesses

Unit loads Utilities

Utilization

Value analysis

Value engineering

Value stream

Voice of the customer [VOC]

Waiting waste

Warehousing activities

Waste

Waste elimination

Work centre load report

Work centres

Work content

Work environment

Workforce

Work measurement techniques



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## SAMPLE QUESTIONS

The sample questions included here are similar in format to the questions contained in the final exam.

These questions are included to enable you to become familiar with the approach to answering questions that you will encounter when you take the exam. Remember these are only sample questions and your score in this sample should not be interpreted as your potential for successfully achieving a pass in the final exam.

Select the most correct answer for each of the following multiple choice questions.

When answering multiple choice questions do the following: Read the question, read the question again underlining the key words and eliminating any definite wrong answers. Read the question again. Remember there is no negative marking, so if in doubt at least take your best shot.

Indicate your answer by circling the appropriate letter, a, b, c, or d.

## Question No. 1

Which is **NOT** an incorporated business?

- a. Personal Liability Company.
- b. Limited Partnership.
- c. Private Limited Company.
- d. Limited Company.

## Question No. 2

Which statement regarding "flows" within the supply chain is **CORRECT?"** 

- a. Goods flow from customers to suppliers.
- b. Demand flows from suppliers to customers.
- c. Information flows in both directions.
- d. Each of the above statements is correct.

## Question No. 3

Which product positioning strategy has the longest customer lead-time?

- a. Engineer-to-order.
- b. Make-to-order.
- c. Assemble-to-order.
- d. Make-to-stock.

## Question No. 4

Which is **NOT** a qualitative forecasting technique?

- a. Delphi method.
- b. Exponential smoothing.
- c. Executive opinions.
- d. Consumer surveys.

Which is the **CORRECT** action to take when load exceeds capacity?

- a. Reduce load and reduce capacity.
- b. Increase load and reduce capacity.
- c. Reduce capacity or increase load.
- d. Increase capacity or reduce load.

## Question No. 6

Which are examples of intermittent production systems?

- a. Job production and batch production.
- b. Job production and repetitive production.
- c. Repetitive production and process production.
- d. Process production and batch production.

## Question No. 7

The type of maintenance that is "condition-based" is:

- a. Periodic maintenance.
- b. Preventive maintenance.
- c. Breakdown maintenance.
- d. Predictive maintenance.

## Question No. 8

Which business function is responsible for getting the finished goods to customers?

- a. Distribution management.
- b. Materials management.
- c. Production planning and control.
- d. Marketing management.

## Question No. 9

Each is a type of materials transport equipment **EXCEPT**:

- a. Conveyors.
- b. Hoists.
- c. Industrial trucks.
- d. Cranes.

## Question No. 10

Which is **NOT** a sub-category of controlled waste?

- a. Industrial waste.
- b. Commercial waste.
- c. Directive waste.
- d. Household waste.



# ANSWERS TO SAMPLE QUESTIONS

## Question No. 1

Which is **NOT** an incorporated business?

- a. Personal Liability Company.
- b. Limited Partnership.
- c. Private Limited Company.
- d. Limited Company.

## **Explanation**

Incorporated businesses are a class of business in which the business has an identity that is separate from its owners, and should the business be sued the owners themselves are protected from debt payment.

A private limited company is a state-authorized business structure that has state-specific regulations; composed of members, who are the owners.

A limited partnership is an unincorporated business set up by a number of individuals to conduct similar business;

some of the members contributing financially, but take no active part in the day-to-day running of the business. These partners are known as "sleeping" partners.

A personal liability company is a state-authorized business structure that falls under state-specific regulations that is composed of members, who are the owners.

## Question No. 2

Which statement regarding "flows" within the supply chain is **CORRECT?"** 

- a. Goods flow from customers to suppliers.
- b. Demand flows from suppliers to customers.
- c. Information flows in both directions.
- d. Each of the above statements is correct.

## **Explanation**

Demand "flows" from the customer back to the supplier base; supply follows the route from supplier to customer.

For a supply chain to perform efficiently reliable information needs to "flow" in both directions.

Which product positioning strategy has the longest customer lead-time?

- a. Engineer-to-order.
- b. Make-to-order.
- c. Assemble-to-order.
- d. Make-to-stock.

## **Explanation**

With an engineer-to-order strategy time is required to design the goods for specific customers, procure the necessary materials, make the goods, and then ship the goods to the customer.

With a make-to-order strategy time is required to procure the materials, make the goods and ship the goods to the customer.

An assemble-to-order product positioning strategy requires time to finish the goods, making use of the final assembly schedule [FAS] and then shipping the goods to customers.

A make-to-stock product positioning strategy has the shortest customer lead-time - ship the goods to customers. Here the goods are produced and held in the finished goods warehouse until requested by a customer or end user.

## Question No. 4

Which is **NOT** a qualitative forecasting technique?

- a. Delphi method.
- c. Executive opinions.
- d. Consumer surveys.

## b. Exponential smoothing.

## **Explanation**

The Delphi method is a group technique in which a panel of experts is questioned individually about their perceptions of future events.

Exponential smoothing is a quantitative forecasting technique using historical data - weighted to favour the most recent information.

Executive opinion uses the subjective views of

company executives or external subject matter experts to generate a forecast relating to future sales.

Consumer surveys use a company's own market surveys regarding specific consumer purchases. Surveys may consist of telephone contacts, personal interviews, or questionnaires. Each is a means of obtaining data.

## Question No. 5

Which is the **CORRECT** action to take when load exceeds capacity?

- a. Reduce load and reduce capacity.
- b. Increase load and reduce capacity.
- c. Reduce capacity or increase load.
- d. Increase capacity or reduce load.

## **Explanation**

The correct action to take when load exceeds capacity is to increase capacity or reduce load. Increasing capacity requires the provision of additional resources. The way to reduce load is to make fewer of the same items or reduce the total number of jobs in the system at that time.

Each of the other suggested answers would only aggravate the situation by either having too much load available, too little load available, too little capacity with which to execute the master production schedule. or too much capacity. The outcome achieved would depend on the action taken at a particular time.

Which are examples of intermittent production systems?

## a. Job production and batch production.

- b. Job production and repetitive production.
- c. Repetitive production and process production.
- d. Process production and batch production.

## **Explanation**

Job production and batch production are both examples of intermittent production, usually associated with a high variety - low volume product mix. These industries produce their goods and services against a make-to-order or an engineer-to-order product positioning strategy. They employ a fixed-location layout or a functional layout.

Repetitive production and process production are examples of continuous production, where the volumes are high and the product variety is relatively low. With this type of production the product positioning strategy is make-to-stock or assemble-to-order. Here use is made of flow production techniques to produce the outputs.

## Question No. 7

The type of maintenance that is "condition-based" is:

- a. Periodic maintenance.
- b. Preventive maintenance.
- c. Breakdown maintenance.
- d. Predictive maintenance.

## **Explanation**

Periodic maintenance is a type of time-based maintenance consisting of periodically inspecting, servicing, cleaning equipment, and replacing parts so as to prevent sudden failure and process-stability problems.

Preventive maintenance attempts to "prevent" failure through the prevention of deterioration, periodic inspection, or equipment condition diagnosis.

Breakdown maintenance is a type of maintenance where maintenance personnel wait until the equipment fails and then repair or replace it - depending on the extent of the breakdown.

Predictive maintenance ensures every piece of equipment in a production process is always able to perform its required task. This allows production to continue without interruptions.

## Question No. 8

Which business function is responsible for getting the finished goods to customers?

### a. Distribution management.

- b. Materials management.
- c. Production planning and control.
- d. Marketing management.

## **Explanation**

Distribution management has the responsibility of getting goods to market, utilizing one of the available modes of transport, and making the correct selection of carrier.

Materials management has the responsibility of ensuring materials are available at the time they are needed; and that these materials are made available in the quantities requested.

Production planning and control schedule work for each of the production facilities and then manage the progress and completion of that work.

Marketing management has the role of determining the market for a company's goods and services, then satisfying that demand through sales.

Each is a type of materials transport equipment **EXCEPT**:

- a. Conveyors.
- b. Hoists.
- c. Industrial trucks.
- d. Cranes.

## **Explanation**

There are three types of transport equipment frequently used in a warehouse environment; conveyors, cranes, and industrial trucks.

Conveyors are a horizontal, inclined, or vertical device for moving or transporting bulk material, packages, or objects in a path predetermined by the design of the device, and having points of loading and discharge, fixed or selective.

Hoists are classified as a piece of positioning equipment. Other forms of positioning equipment include air-film device, balancers, ball transfer tables, lift-and-tilt tables, parts feeders, and rotary index tables.

Industrial trucks include wheeled vehicles used in the factory, warehouse or distribution centre, in the dock area, [and in some cases also in the yard or on construction sites], to pick up, transport, and deposit single loads.

Cranes are machines for lifting or lowering a load and moving it horizontally. Drives may be manual, powered, or a combination of both.

### Question No. 10

Which is **NOT** a sub-category of controlled waste?

- a. Industrial waste.
- b. Commercial waste.
- c. Directive waste.
- d. Household waste.

## **Explanation**

Directive waste includes any substance or object which the producer or the person in possession of it discards, intends to discard, or is required to discard. This forms the basic definition of waste as we understand it in the workplace.

Controlled waste is waste subject to legislative control in both its handling and disposal.

Controlled waste encompasses all forms of household, industrial and commercial waste - or any other such waste that has no future economic value attached to it.





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