



## Search for a Preventive Maintenance Schedule — Work Plan

#### **Overview**

The Maintenance and Utilization module Schedule Preventive Maintenance — Work Plan process provides the ability to build Preventive Maintenance (PM) schedules with one or more Work Plans.

#### **Helpful Tip**

If a Vehicle needs to be inspected every 10,000 miles and the last time the inspection was completed was at 50,000 miles, then the next time that the asset should be inspected again is 60,000 miles (50,000 + 10,000).

It is imperative that the user reports the asset use in ELMS.

However, if the user **has not** been reporting utilization, then the asset in ELMS is still at 50,000 miles. It doesn't matter that it has been three months since the last inspection point, and the asset had accumulated 13,000 miles, yielding a total utilization of 63,000 miles. Therefore, a Work Order **does not** generate for this asset because, according to the data provided in ELMS, the latest utilization quantity is 50,000 miles and the asset is not yet due for Maintenance at this point.

### **Navigation**

Maintenance > SCHED PREVENT MAINT > MAINT SCHED/Work Plans > Schedule Preventive Maintenance — Work Plan Search page

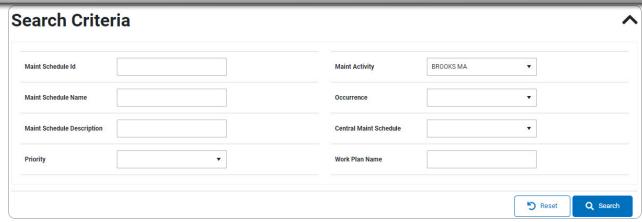
#### **Procedures**

#### Search for a Preventive Maintenance Schedule — Work Plan

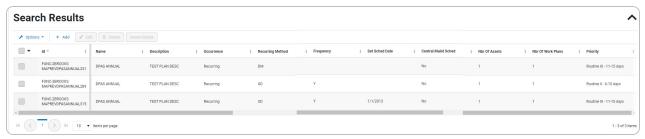
One or more of the Search Criteria fields can be entered to isolate the results. By default, all results are displayed. Selecting at any point of this procedure returns all fields to the default "All" setting.

1. In the Search Criteria box, narrow the results by entering one of the following optional fields.





2. Select . The results display in the Search Results grid.



#### **View the Asset Details**

- 1. Click to select the desired work plan. The row becomes highlighted, and the and Asset Details buttons are available. The button is available when the Nbr of Assets is 0.
- 2. Select Asset Details . The Search for a Preventive Maintenance Schedule Asset Assignment page appears.

**Unclassified** 





## Add a Preventive Maintenance Schedule — Work Plan

#### **Navigation**

Maintenance > SCHED PREVENT MAINT > MAINT SCHED/Work Plans > MAINT SCHED

Search > + Add > Schedule Preventive Maintenance — Work Plan Add page

#### **Procedures**

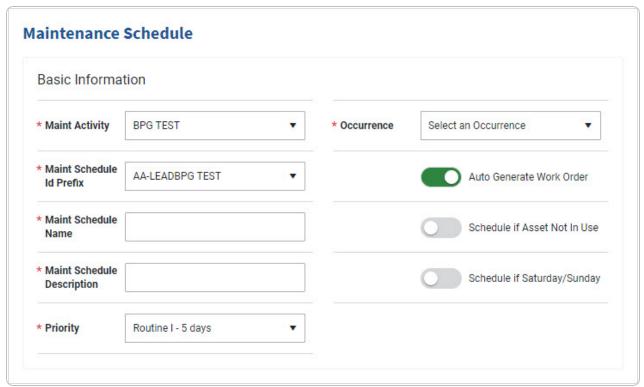
#### Add a Preventive Maintenance Schedule — Work Plan

Selecting at any point of this procedure removes all revisions and closes the page. **Bold** numbered steps are required.

Selecting at any point of this procedure returns all fields to the default setting.



1. Select + Add a Preventive Maintenance Schedule page appears.

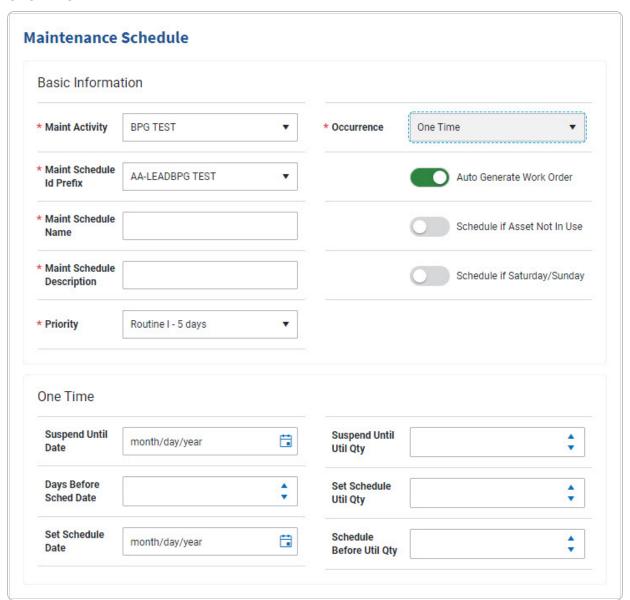


- **A.** Use \* to select the Maint Activity.
- **B.** Use \* to select the Maint Schedule Id Prefix.
- **C.** Enter the Maint Schedule Name in the field provided. *This is a 50 alphanumeric character field.*
- **D.** Enter the MAINT SCHEDULE DESCRIPTION in the field provided. *This is a 250 alphanumeric character field.*
- **E.** Use \* to select the Priority.
- **F.** Use \* to select the Occurrence.





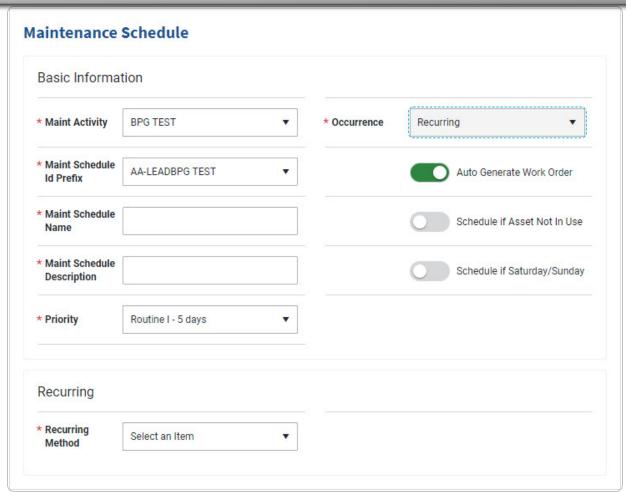
One Time



Recurring





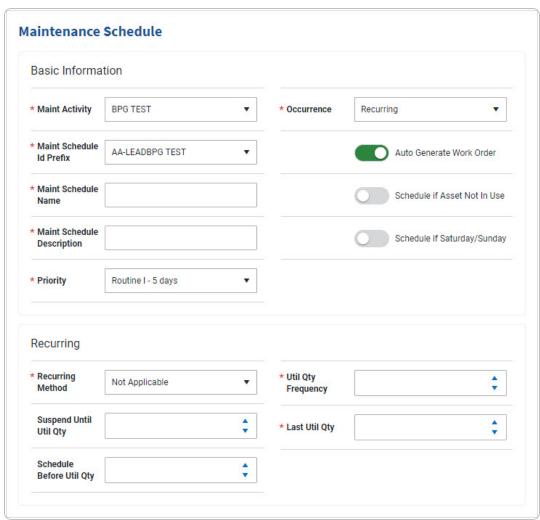


**Unclassified** 



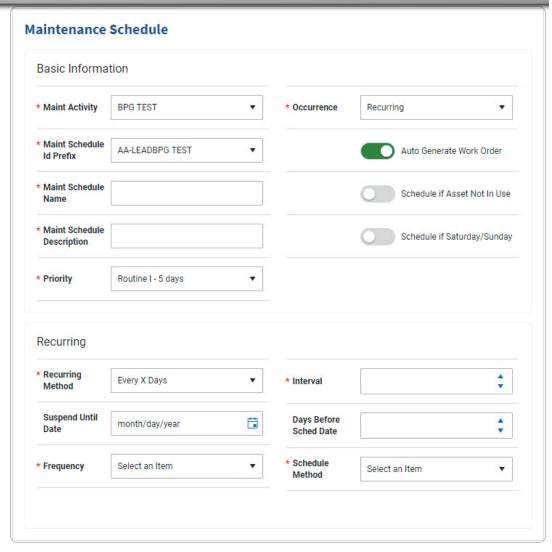


- **a.** Use \* to select the Recurring Method.
  - Not Applicable



- **1.** Use \* to select the Recurring Method.
- 2. Use to choose the UTIL QTY FREQUENCY.
- **3.** Use to choose the LAST UTIL QTY.
- Every X Days

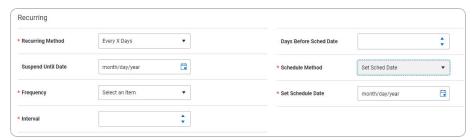




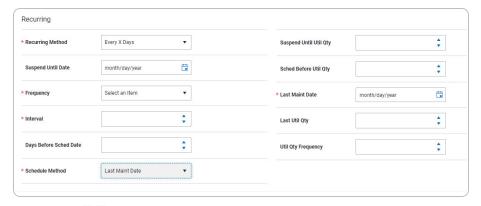
- **1.** Use \* to select the Recurring Method.
- 2. Use \* to select Frequency.
- **3.** Use to choose the Interval.
- **4.** Use \* to select the Schedule Method.



#### A. Set Sched Date



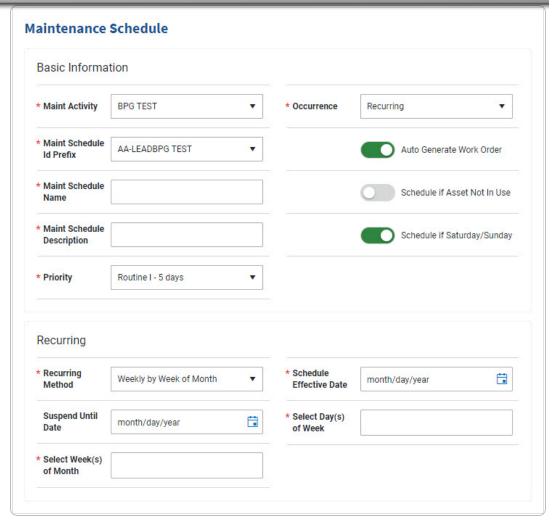
B. Last Maint Date



- a. Use to select the LAST MAINT DT, or enter the date (MM/DD/YYYY) in the field provided.
- · Weekly by Week of Month







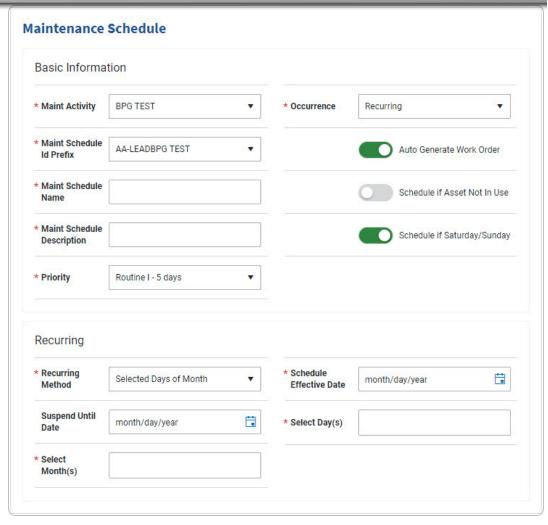
- **1.** Use \* to select the Recurring Method.
- **2.** Select the Select Week(s) of Month field to choose the month(s) from the list.
- 3. Use to select the SCHEDULE EFFECTIVE DATE, or enter the date (MM/DD/YYYY) in the field provided.
- **4.** Select the Select Day(s) of the Week field to choose the number(s) from the list.
- Selected Days of Month







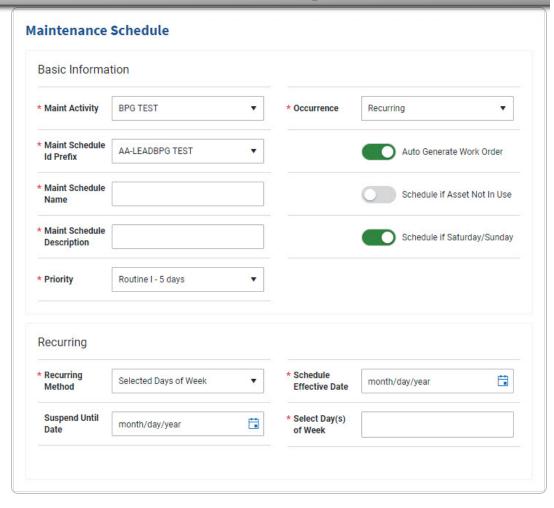




- **1.** Use \* to select the Recurring Method.
- **2.** Select the Select Month(s) field to choose the month(s) from the list.
- 3. Use to select the SCHEDULE EFFECTIVE DATE, or enter the date (MM/DD/YYYY) in the field provided.
- **4.** Select the Select Day(s) field to choose the day(s) from the list.
- Selected Days of Week

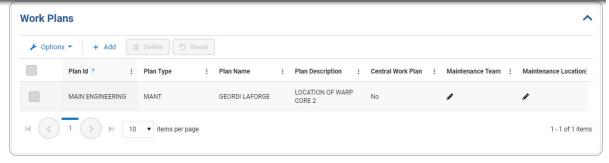




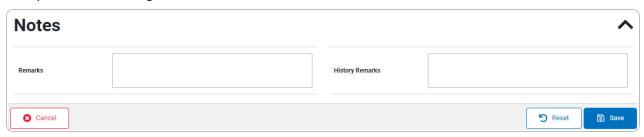


- **1.** Use \* to select the Recurring Method.
- 2. Use to select the SCHEDULE EFFECTIVE DATE, or enter the date (MM/DD/YYYY) in the field provided.
- **3.** Select the Select Day(s) of Week field to choose the number(s) from the list.
- 2. Complete the Work Plans grid.
  - Click to select the Work Plan. *All Maintenance Schedules must contain at least*one Work Plan. If it does not, select + Add , and the **Select Work Plans** pop-up window appears.





- Delete a Work Plan
  - A. Click to select the desired work plan. The row becomes highlighted, and the hadd, Delete and buttons are available.
  - B. Select Delete. The Work Plan is immediately removed from the Search Results grid.
- 3. Complete the Notes grid.



- 4. Select . A verification pop-up window appears if the Auto Generate Work Order is changed. The **Add a Preventive Maintenance Schedule** page closes and
  - A. If the Auto Generate Work Order is changed from to , the verification pop-up window appears:

appears as the entry is added to the Search Results grid.





You have chosen to NOT auto-generate this work order. Are you sure you don't want the work order auto-generated on the selected schedule dates?



✓ Yes, Proceed

Select No, Make Changes

. The **Add a Preventive Maintenance Schedule** 

page appears.

a.

OR



added to the Search Results grid.





# Update the Preventive Maintenance Schedule — Work Plan

#### **Navigation**

Maintenance > SCHED PREVENT MAINT > MAINT SCHED / Work Plans > 

(desired record) > Schedule Preventive Maintenance — Work Plan Update page

#### **Procedures**

#### **Update a Preventive Maintenance Schedule — Work Plan**

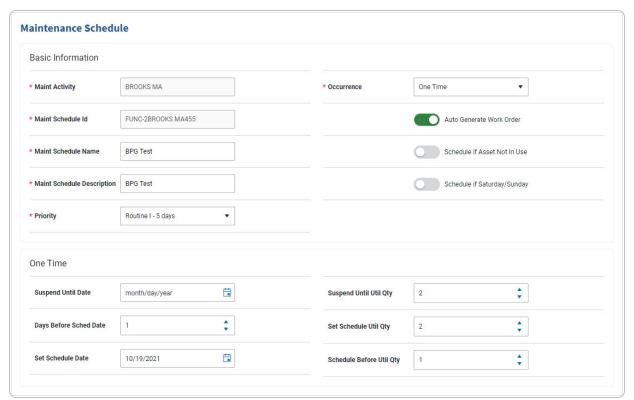
Selecting at any point of this procedure removes all revisions and closes the page. **Bold** numbered steps are required.

- 1. Click to select the desired preventive maintenance. The row becomes highlighted, and the least and least least buttons are available. The least button is available when the NBR of Assets is 0.
- 2. Select Description of the Update a Preventive Maintenance Schedule page appears.





One Time



- **A.** Verify the MAINT ACTIVITY.
- **B.** Verify the MAINT SCHEDULE ID.
- **C.** Update the MAINT SCHEDULE NAME, entering the revised identifier in the field provided. *This is a 50 alphanumeric character field.*
- **D.** Update the MAINT SCHEDULE DESCRIPTION, entering the revised explanation in the field provided. *This is a 250 alphanumeric character field.*
- **E.** Update the Priority, using \* to select the desired prerogative.
- **F.** Update the Occurrence, using \* to select the desired status.

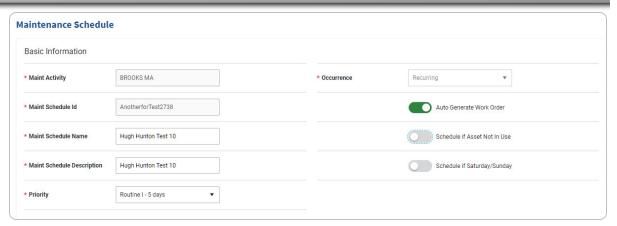
The MAINT SCHEDULE ID, Occurrence and MAINT ACTIVITY fields become read-only when the Nbr of Assets exceeds 0.

Recurring



Note

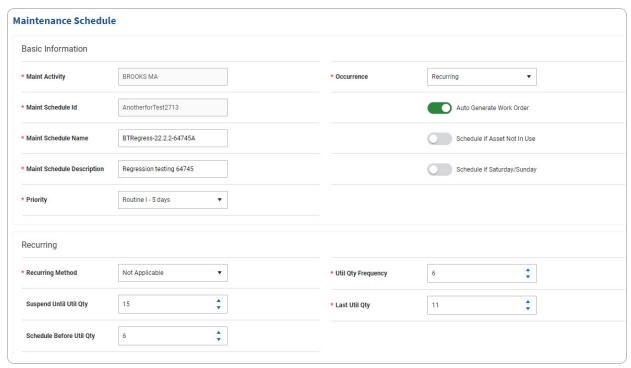




- **A.** Verify the MAINT ACTIVITY.
- **B.** Verify the MAINT SCHEDULE ID.
- **C.** Update the MAINT SCHEDULE NAME, entering the revised identifier in the field provided. *This is a 50 alphanumeric character field.*
- **D.** Update the MAINT SCHEDULE DESCRIPTION, entering the revised explanation in the field provided. *This is a 250 alphanumeric character field*.
- **E.** Update the Priority, using \* to select the desired prerogative.
- **F.** Verify the Occurrence.



Not Applicable



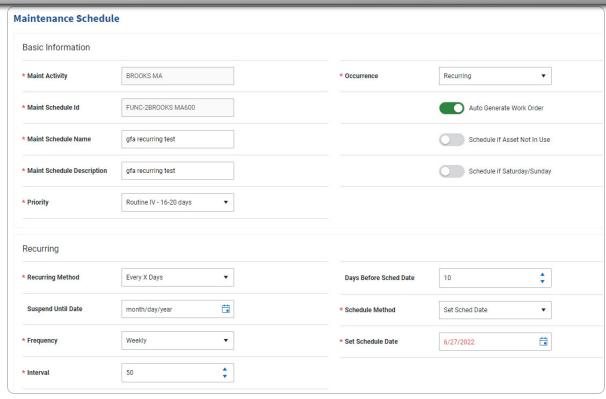
**a.** Update the Recurring Method, using \* to select the desired method.

#### Note

The Recurring Method, UTIL QTY FREQUENCY and LAST UTIL QTY fields become read-only when the Nbr of Assets exceeds 0.

- **b.** Update the UTIL QTY FREQUENCY, using to choose the revised frequency.
- **c.** Update the LAST UTIL QTY, using to choose the revised quantity.
- Every X Days





**a.** Update the Recurring Method, using \* to select the desired method.

The Recurring Method, Frequency, Interval, and Schedule Method fields become read-only when the Nbr of Assets exceeds 0.

- **b.** Update the Frequency, using \* to select the desired frequency.
- **c.** Update the Interval, using to choose the revised quantity.
- **d.** Update the Schedule Method, using \* to select the desired method.
  - 1. Set Sched Date

Note

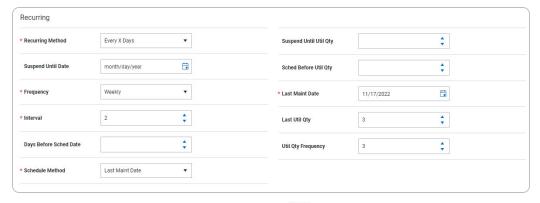
Update the Set Schedule Date, using or entering the date (MM/DD/YYYY) in the field provided.



#### Note

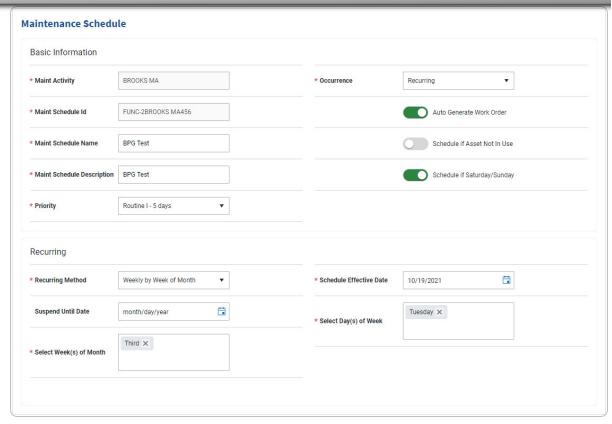
The Set Schedule Date field becomes read-only when the Nbr of Assets exceeds 0.

2. Last Maint Date



- Update the LAST MAINT DT, using 📮 or entering the date A. (MM/DD/YYYY) in the field provided.
- Weekly by Week of Month





- **a.** Update the Recurring Method, using \* to select the desired process. Update the Select Weeks(s) of Month field by either:
- **b.**Add a week by selecting the field and choosing additional weeks.

Delete by selecting the X on the week entry.

- C. Update the SCHEDULE EFFECTIVE DATE, using or entering the date (MM/DD/YYYY) in the field provided.
  - Update the Select Day(s) of the Week field by either:
- Add a day by selecting the field and choosing additional days.

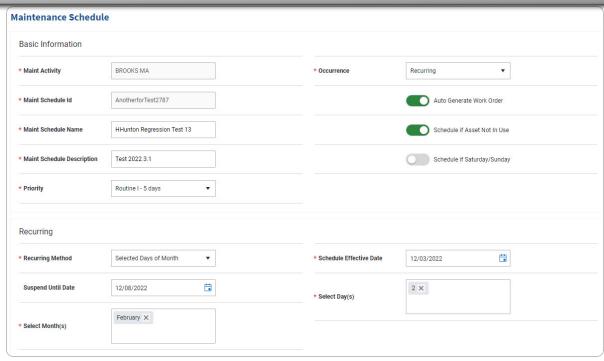
**OR**Delete by selecting the X on the day entry.

Selected Days of Month

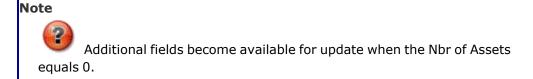
**OR** 







- Update the Recurring Method, using \* to select the desired process.Update the Select Month(s) field by either:
- Add a month by selecting the field and choosing additional months.
  OR
  Delete by selecting the X on the month entry.

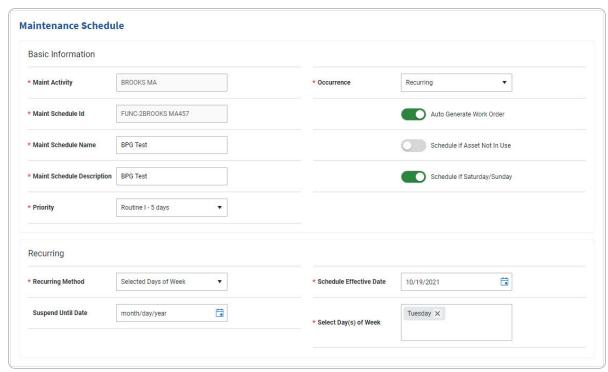


- C. Update the SCHEDULE EFFECTIVE DATE, using or entering the date (MM/DD/YYYY) in the field provided.
  - Update the Select Day(s) field by either:
- d.
  Add a date number by selecting the field and choosing additional numbers.
  OR
  Delete by selecting the X on the number entry.

**Unclassified** 



Selected Days of Week



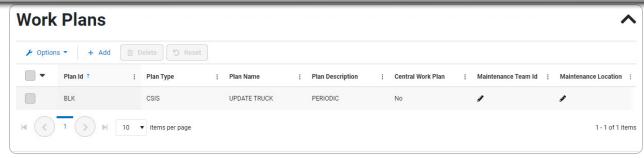
- **a.** Update the Recurring Method, using \* to select the desired process.
- **b.** Update the SCHEDULE EFFECTIVE DATE, using or entering the date (MM/DD/YYYY) in the field provided.

Update the Select Day(s) of the Week field by either:

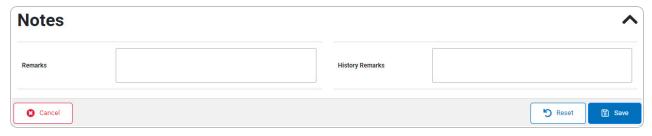
Add a day by selecting the field and choosing additional days.
OR
Delete by selecting the X on the day entry.

3. Click to select the Work Plan. All Maintenance Schedules must contain at least one Work Plan. If it does not, select + Add, and the **Select Work Plans** pop-up window appears.





- Delete a Work Plan
  - A. Click to select the desired work plan. The row becomes highlighted, and the hadd Delete, and buttons are available.
  - B. Select Delete. The Work Plan is immediately removed from the Search Results grid.
- 4. Verify the Notes grid.



- 5. Select . A verification pop-up window appears if the Auto Generate Work Order is changed. The **Update a Preventive Maintenance Schedule** page closes and

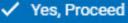
  | Maintenance schedule successfully updated. | appears as the entry is updated in the Search Results grid.
  - A. If the Auto Generate Work Order is changed from to , the verification pop-up window appears:





You have chosen to NOT auto-generate this work order. Are you sure you don't want the work order auto-generated on the selected schedule dates?





No, Make Changes Select ule page appears.

. The Update a Preventive Maintenance Sched-

a.

OR

 Yes, Proceed Select The **Update a Preventive Maintenance Schedule** Maintenance schedule successfully added. page closes and appears as the entry is added to the Search Results grid.

#### **Delete a Preventive Maintenance Schedule**

- to select the desired preventive maintenance schedule. The row becomes high-1. buttons are available. The lighted, and the button is available when the NBR of Assets is 0.
- @ Edit 2. Select . The **Update a Preventive Maintenance Schedule** page appears.



n Delete 3. Select The **Delete a Preventive Maintenance Schedule** pop-up window appears.





## **Delete a Scheduled Preventive Maintenance — Work Plan**

#### **Navigation**

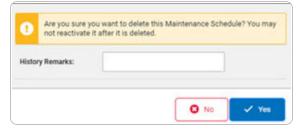
Maintenance > SCHED PREVENT MAINT > MAINT SCHED/Work Plans > Q Search > (desired record) > Schedule Preventive Maintenance — Work Plan Delete pop-up window

#### **Procedures**

#### Delete a Preventive Maintenance Schedule — Work Plan

Selecting at any point of this procedure removes all revisions and closes the page. **Bold** numbered steps are required.

- 1. Click to select the desired preventive maintenance. The row becomes highlighted, and the least and least least buttons are available. The least button is available when the NBR of Assets is 0.
- 2. Select Delete a Preventive Maintenance Schedule pop-up window appears.



- 3. Enter the History Remarks in the field provided. *This is a 256 alphanumeric character field*.
- 4. Select Yes . The Scheduled Preventive Maintenance Record is removed.