

Simplicity Software Technologies Inc. Presents

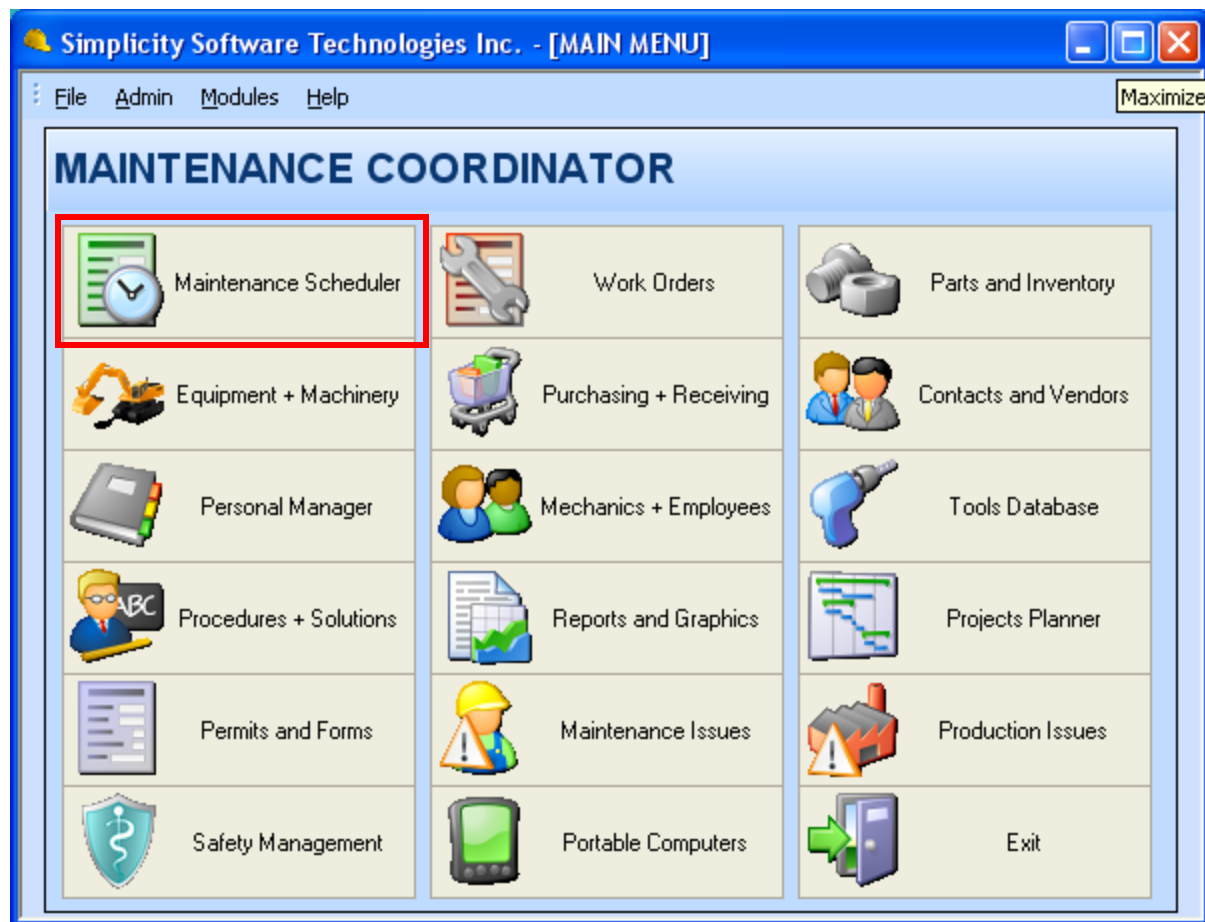
Creating a New Planned Maintenance Task



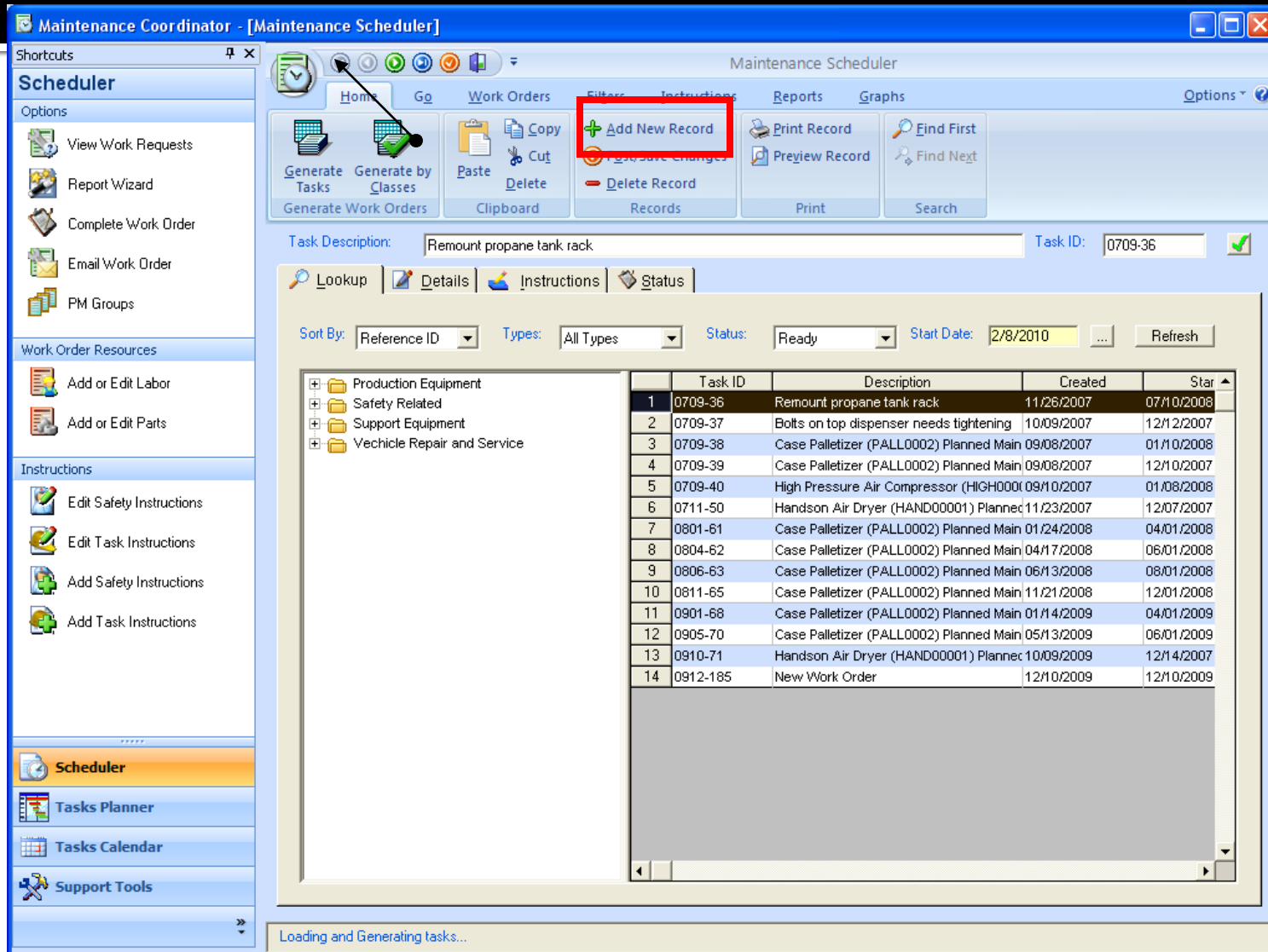
With Maintenance Coordinator

The following set of slides will guide you through the steps required to make a new PM using Maintenance Coordinator and its Work Order Creation Wizard.

Click on the Maintenance Scheduler Module



Click the add new icon in the toolbar, or open the Application menu and select the **ADD NEW WORK ORDER** option



Maintenance Coordinator - [Maintenance Scheduler]

Shortcuts: Scheduler

Options:

- View Work Requests
- Report Wizard
- Complete Work Order
- Email Work Order
- PM Groups

Work Order Resources:

- Add or Edit Labor
- Add or Edit Parts

Instructions:

- Edit Safety Instructions
- Edit Task Instructions
- Add Safety Instructions
- Add Task Instructions

Scheduler

Tasks Planner

Tasks Calendar

Support Tools

Maintenance Scheduler

Home Go Work Orders Filters Instructions Reports Graphs Options

Generate Tasks Generate by Classes Paste Copy Cut Delete Generate Work Orders Clipboard Records Add New Record Delete Record Print Record Preview Record Find First Find Next

Task Description: Remount propane tank rack Task ID: 0709-36

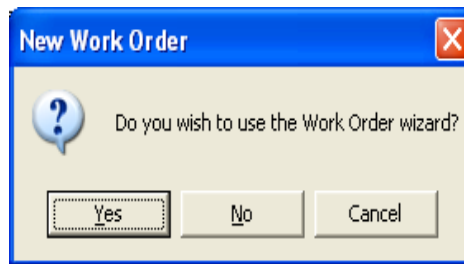
Lookup Details Instructions Status

Sort By: Reference ID Types: All Types Status: Ready Start Date: 2/8/2010 Refresh

	Task ID	Description	Created	Star
1	0709-36	Remount propane tank rack	11/26/2007	07/10/2008
2	0709-37	Bolts on top dispenser needs tightening	10/09/2007	12/12/2007
3	0709-38	Case Palletizer (PALL0002) Planned Main	09/08/2007	01/10/2008
4	0709-39	Case Palletizer (PALL0002) Planned Main	09/08/2007	12/10/2007
5	0709-40	High Pressure Air Compressor (HIGH0001) Planned	09/10/2007	01/08/2008
6	0711-50	Handson Air Dryer (HAND00001) Planned	11/23/2007	12/07/2007
7	0801-61	Case Palletizer (PALL0002) Planned Main	01/24/2008	04/01/2008
8	0804-62	Case Palletizer (PALL0002) Planned Main	04/17/2008	06/01/2008
9	0806-63	Case Palletizer (PALL0002) Planned Main	06/13/2008	08/01/2008
10	0811-65	Case Palletizer (PALL0002) Planned Main	11/21/2008	12/01/2008
11	0901-68	Case Palletizer (PALL0002) Planned Main	01/14/2009	04/01/2009
12	0905-70	Case Palletizer (PALL0002) Planned Main	05/13/2009	06/01/2009
13	0910-71	Handson Air Dryer (HAND00001) Planned	10/09/2009	12/14/2007
14	0912-185	New Work Order	12/10/2009	12/10/2009

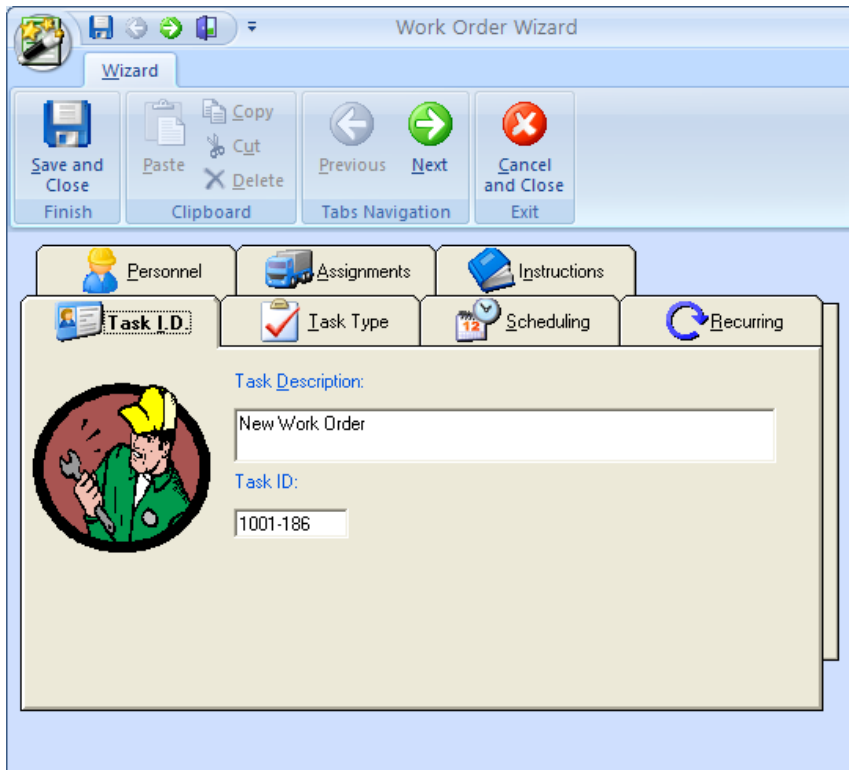
Loading and Generating tasks...

Click YES to the following dialog



The work order wizard simplifies the Work Order creation process by guiding you through the steps required to create a new task.

Work Order Creation Wizard



The screenshot shows the 'Work Order Wizard' application window. At the top, there is a title bar with the text 'Work Order Wizard' and a standard Windows toolbar. Below the title bar is a 'Wizard' tab. The main area contains several buttons: 'Save and Close' (with a floppy disk icon), 'Finish' (with a green checkmark icon), 'Clipboard' (with 'Paste', 'Copy', 'Cut', and 'Delete' icons), 'Previous' (with a left arrow icon), 'Next' (with a right arrow icon), 'Cancel and Close' (with a red X icon), and 'Exit' (with a red X icon). Below these buttons are four tabs: 'Personnel' (with a person icon), 'Assignments' (with a truck icon), 'Instructions' (with a book icon), and 'Task I.D.' (with a document icon). The 'Task I.D.' tab is selected, showing a 'Task Description' field with the text 'New Work Order' and a 'Task ID' field with the text '1001-186'. A cartoon character of a worker in a green uniform and yellow hard hat is visible on the left side of the 'Task I.D.' tab.

Start the creation of your new work order by:

- Typing in a brief description of the new task in TASK DESCRIPTION field.
- Leaving the automatic TASK ID alone.
- Click the NEXT button to move to the next step or tab.

TASK TYPE

The screenshot shows the 'Work Order Wizard' window. The 'Task Type' tab is selected, showing a list of task types. The list is divided into two sections: 'Planned Maintenance Type Tasks (recurring)' and 'Standard Work Order Types (one-shot)'. The 'Planned Maintenance' option is selected.

Work Order Wizard

Wizard

Save and Close Finish | Paste Copy Cut Delete Clipboard | Previous Next Tabs Navigation | Cancel and Close Exit

Personnel | Assignments | Instructions

Task I.D. | **Task Type** | Scheduling | Recurring

Please select the task type for this work order:

Planned Maintenance Type Tasks (recurring):

- ☒ Planned Maintenance
- ☐ Mini PM
- ☐ Change Over

Standard Work Order Types (one-shot):

- ☐ Imminent Danger
- ☐ Safety Hazard
- ☐ Safety Concern
- ☐ Standard Work Order

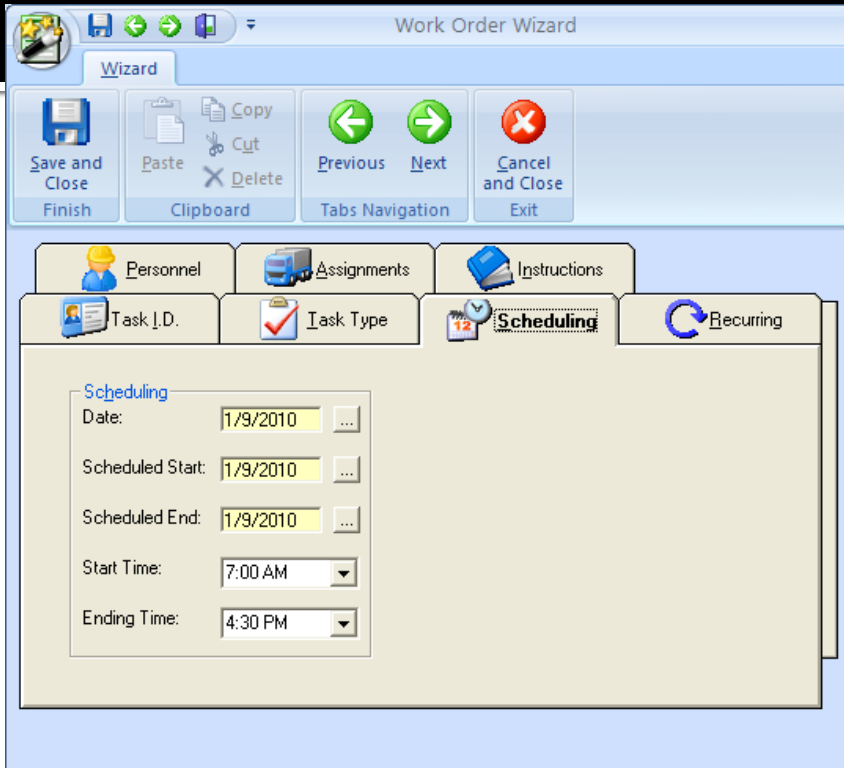
Task Type tells us a couple of things. The top 3 in the list are recurring types of tasks, where the program will automatically recreate them as needed.

The bottom 4 task types are single shot, or repair types of work orders, that when completed are NOT regenerated by the program.

For this exercise we will:

- Select the recurring 'Full Planned Maintenance Type Task' also known as a PM.
- Click the NEXT button to move to the next step or tab.

TASK SCHEDULING



The screenshot shows the 'Work Order Wizard' application window. The 'Wizard' tab is active, displaying a toolbar with buttons for 'Save and Close', 'Clipboard' (Paste, Cut, Delete), 'Previous', 'Next', 'Cancel and Close', and 'Exit'. Below the toolbar are four tabs: 'Personnel', 'Assignments', 'Instructions', and 'Scheduling'. The 'Scheduling' tab is selected, showing a form with the following fields:

- Date: 1/9/2010
- Scheduled Start: 1/9/2010
- Scheduled End: 1/9/2010
- Start Time: 7:00 AM
- Ending Time: 4:30 PM

Task Scheduling tells us the following information:

- DATE – This is the date assigned as the task creation or request date.
- SCHEDULED START – This is the day we would like to see work start on the task.
- SCHEDULED END – This is when we would like to see the task completed.
- START AND END TIMES – These are the hours we want work performed on the task.

For this exercise we will:

- Click on the ... button next to each date field and then select the appropriate date from within the pop-up calendar.
- Click on the Down Arrows adjacent to the times, and select the appropriate times.
- Click the NEXT button to move to the next step or tab.

POP-UP CALENDAR



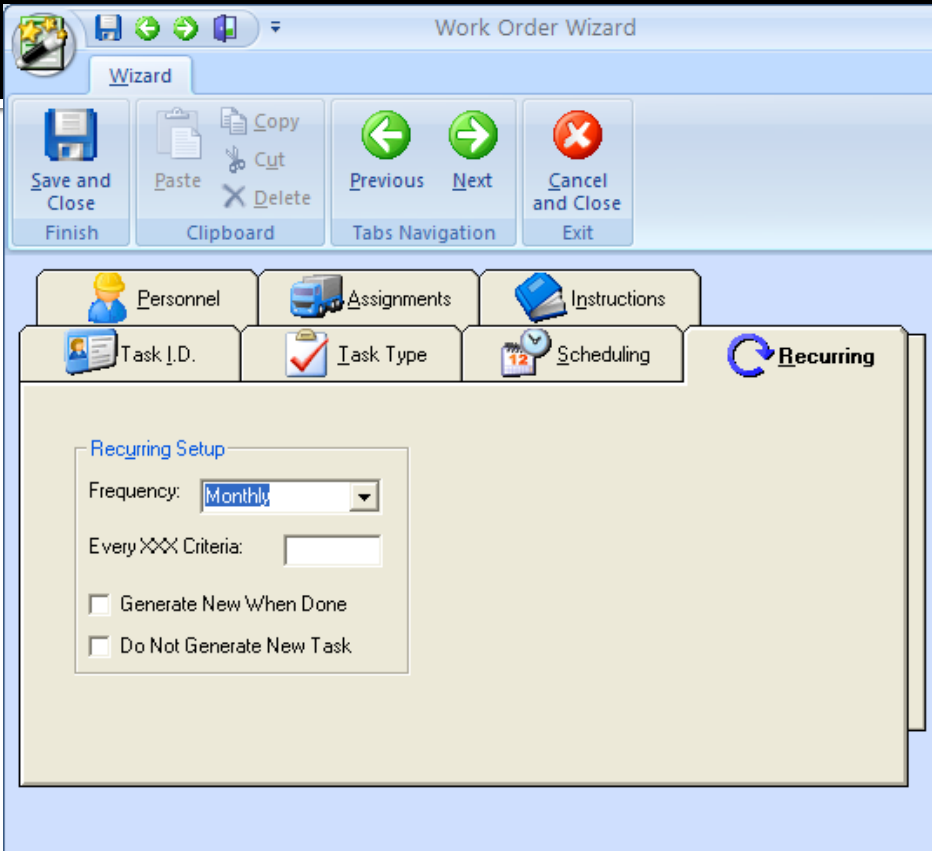
To use the Pop-up Calendar:

- Click on a date cell within the Calendar
- Click on the SELECT DATE button.

Other Elements on the Calendar:

- < or > moves backwards or forwards one month
- << or >> moves you two months at a time
- <Year or Year> moves your one year at a time
- Today moves you to today's date

RECURRING SETUP



The screenshot shows the 'Work Order Wizard' application window. The title bar reads 'Work Order Wizard'. Below the title bar is a 'Wizard' tab. The main area contains a 'Recurring Setup' section with the following elements:

- Frequency:** A dropdown menu currently showing 'Monthly'.
- Every XXX Criteria:** An empty text input field.
- Generate New When Done:** An unchecked checkbox.
- Do Not Generate New Task:** An unchecked checkbox.

Navigation buttons are located at the top of the wizard area:

- Save and Close:** A button with a floppy disk icon and the text 'Finish' below it.
- Paste:** A button with a clipboard icon and the text 'Clipboard' below it.
- Copy:** A button with a document icon and the text 'Copy' below it.
- Cut:** A button with a scissors icon and the text 'Cut' below it.
- Delete:** A button with an 'X' icon and the text 'Delete' below it.
- Previous:** A button with a left arrow icon and the text 'Previous' below it.
- Next:** A button with a right arrow icon and the text 'Next' below it.
- Cancel and Close:** A button with a red 'X' icon and the text 'Exit' below it.

At the bottom of the wizard area, there are several tabs: 'Personnel', 'Assignments', 'Instructions', 'Task I.D.', 'Task Type', 'Scheduling', and 'Recurring'. The 'Recurring' tab is currently selected and highlighted with a blue border.

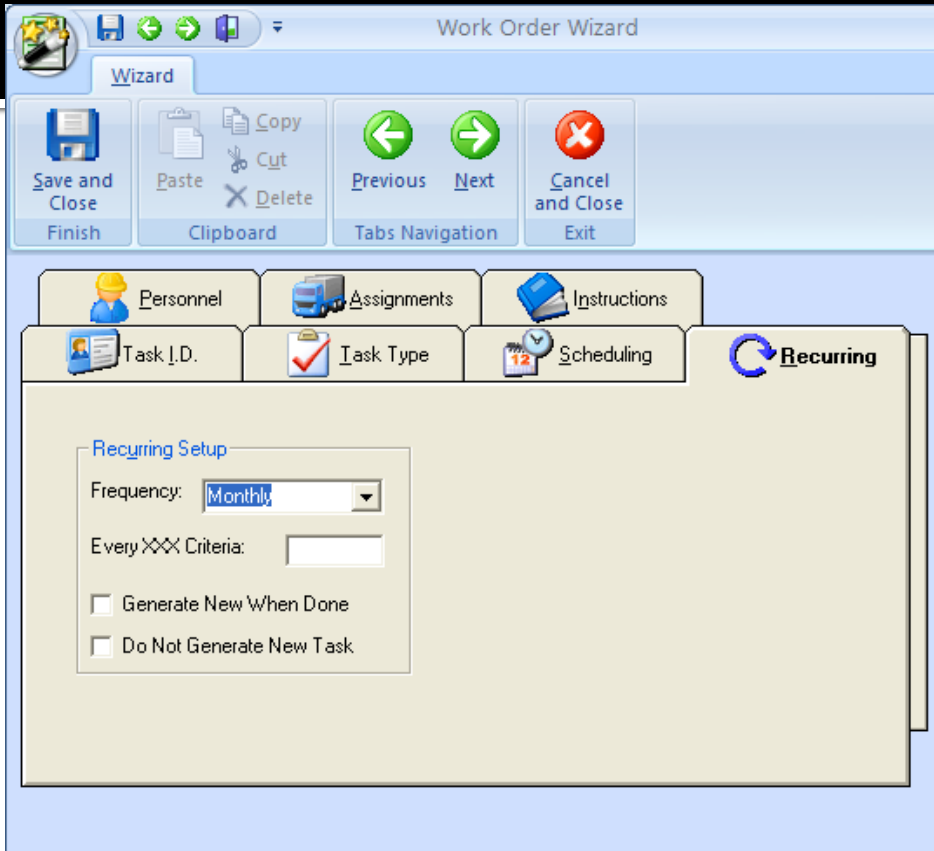
For recurring types of tasks you need to setup how often you want the task to repeat itself, or be regenerated automatically by the program.

There are many built in recurring setups to choose from, and are available from the FREQUENCY drop down list box.

For this exercise we will:

- Select the recurring frequency of 'Monthly' from the FREQUENCY drop down list.
- Click the NEXT button to move to the next step or tab.

RECURRING SETUP



The screenshot shows the 'Work Order Wizard' window with the 'Recurring' tab selected. The 'Recurring Setup' section contains a 'Frequency' dropdown menu set to 'Monthly', an 'Every XXX Criteria' text field, and two checkboxes: 'Generate New When Done' and 'Do Not Generate New Task'.

Work Order Wizard

Wizard

Save and Close Finish Paste Cut Delete Clipboard Previous Next Tabs Navigation Cancel and Close Exit

Personnel Assignments Instructions

Task I.D. Task Type Scheduling **Recurring**

Recurring Setup

Frequency: Monthly

Every XXX Criteria:

☐ Generate New When Done

☐ Do Not Generate New Task

Choosing a recurring frequency with XX in it's description requires you to setup how often to repeat the task.

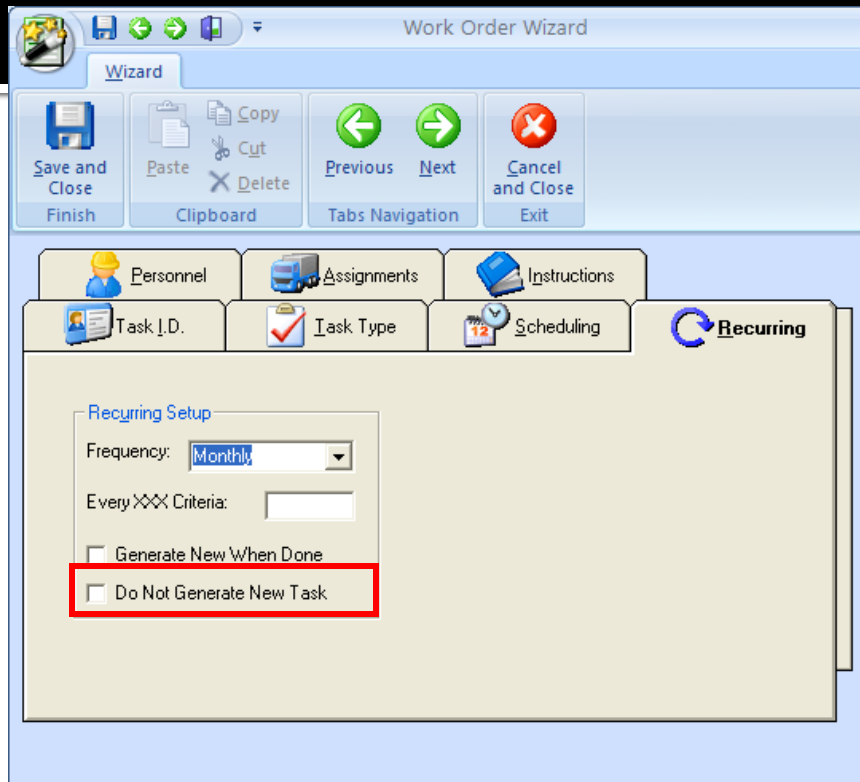
For example, choosing the 'Every XX Units' frequency requires you to also setup the 'Every XXX Criteria', where this information spells out how often to repeat the task.

With the example shown, this task would repeat itself every 3000 units, miles, or hours, as the case might be.

With recurring setups like "Every XX Days" or 'Every XX Weeks, and so on, the program just uses the "Every XXX Criteria' to multiply to the Days, Weeks, etc. from the last Scheduled Date to arrive at a new start date.

With the 'Every XX Units' frequency a piece of equipment must be assigned to the work order. This piece of equipment must also be using meters, and these meters updated on a regular bases. When the equipment meter reaches or exceeds the recurring frequency criteria, a new work order will be generated.

DO NOT GENERATE NEW TASK



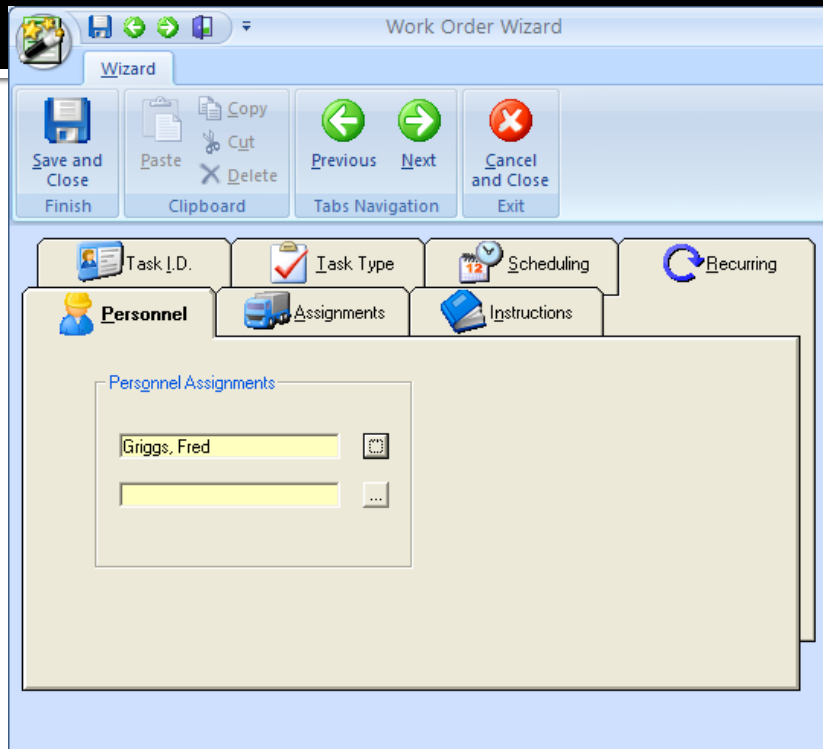
A note about the DO NOT GENERATE NEW TASK checkbox:

When a check is placed here, the program will not generate a new task for the selected task even if a recurring frequency has been set up. The program itself places a check here right after a new task has been created. This is done to prevent the program from repeatedly generating the same task over and over again.

Whenever the program automatically places a check in the 'Do Not Generate New Task' checkbox, this means the program has already generated a new work order for this task. This however does not mean that the task will show up in the current sort. The default sorts in the Lookup View of the Scheduler only shows so many days in advance to help keep the information found there to a reasonable size.

To view tasks that have not been regenerated yet, open the SORT menu and select the SORT BY NOT GENERATED ANEW option from the Scheduler main screen.

RESOURCE ASSIGNMENTS

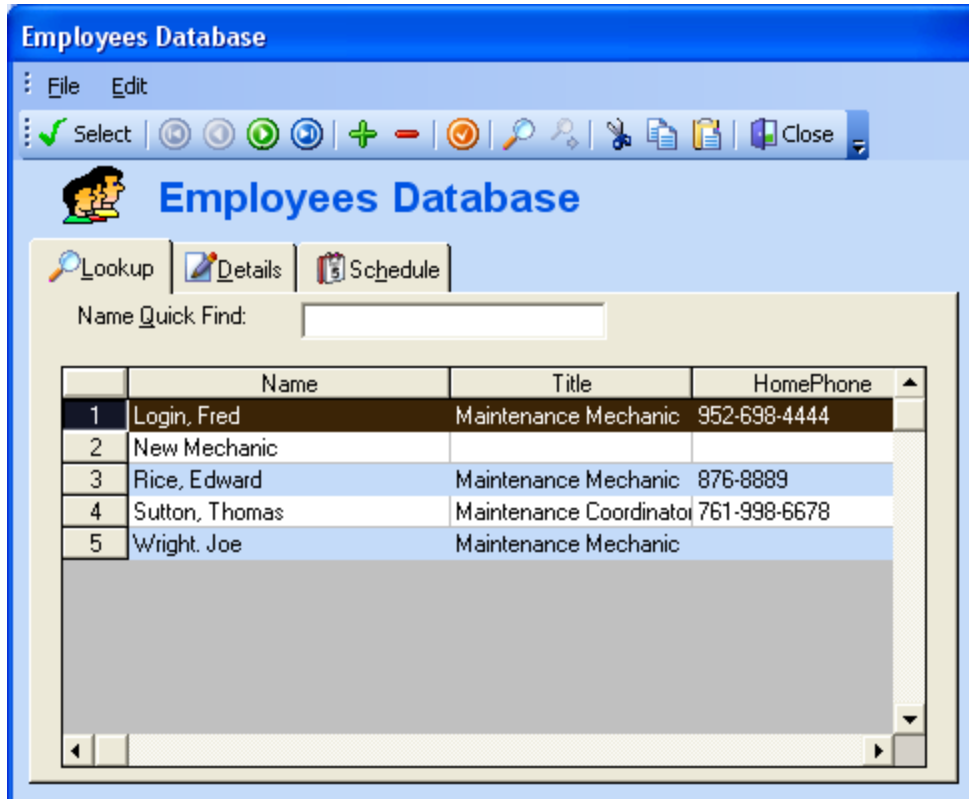


With Personnel Assignments you actually assign the work order to mechanics so they can perform the required tasks to complete the work order.

To make Personnel Assignments:

- Click on the ... box next to resource assignment you want to make.
- Select the Mechanic by clicking on them from within the Pop-up list.
- Click the SELECT button.
- Click the NEXT button to move to the next step or tab.

Employee Lookup



To use the Employee Lookup:

- Move to the Grid and click on the employee or mechanic of your choice.
- Click on the **SELECT** button.

The Details tab shows more information about the selected employee such as job title, phone numbers and email address.

The Schedule tab shows work orders currently assigned to this employee. With this information you can see if they are available to perform the work on the selected work order.

ASSIGNMENTS

The screenshot shows the 'Work Order Wizard' window with the 'Assignments' tab selected. The window has a title bar 'Work Order Wizard' and a 'Wizard' tab. Below the title bar is a toolbar with icons for 'Save and Close Finish', 'Clipboard' (Copy, Paste, Cut, Delete), 'Tabs Navigation' (Previous, Next), and 'Cancel and Close Exit'. The main area has four tabs: 'Task I.D.', 'Task Type', 'Scheduling', and 'Recurring'. The 'Assignments' tab is active, showing three sections: 'Machine Assignment' with a text box containing 'High Pressure Air Compressor' and a dropdown arrow; 'Classification Assignment' with a text box containing 'Support Equipment' and a dropdown arrow; and 'Work Requested By' with a text box containing 'Richards, Gary' and a user selection icon.

On the Assignments tab you assign the following to your task:

- Machine or Equipment.
- Classification or Group.
- Who requested the work.

To make Machine Assignment:

- Click on the ... box next to Machine Assignment field.
- Select the Machine by clicking on it from within the Pop-up list.
- Click the SELECT button.

CLASSIFICATION ASSIGNMENTS

The screenshot shows the 'Work Order Wizard' application window. At the top is a 'Wizard' toolbar with buttons for 'Save and Close Finish', 'Clipboard' (Copy, Paste, Cut, Delete), 'Previous', 'Next', 'Cancel and Close Exit', and 'Tabs Navigation'. Below the toolbar are several tabs: 'Task I.D.', 'Task Type', 'Scheduling', 'Recurring', 'Personnel', 'Assignments' (which is the active tab), and 'Instructions'. The 'Assignments' tab contains three sections: 'Machine Assignment' with a text field containing 'High Pressure Air Compressor' and a selection button (...); 'Classification Assignment' with a text field containing 'Support Equipment' and a selection button (...); and 'Work Requested By' with a text field containing 'Richards, Gary' and a selection button (...).

Classifications are much like a user defined field and should be used in such a way that makes the most sense to your organization. Valid classifications could describe a production line, property, building, a client, or any other way you would like to group your work orders. Classifications or classes help group tasks for reporting and viewing purposes.

To make a Classification Assignment:

- Click on the ... box next to Classification Assignment field.
- Select the Classification by clicking on its description from within the Pop-up list.
- Click the SELECT button.

WORK REQUESTED BY

The screenshot shows the 'Work Order Wizard' application window. At the top, there's a title bar with standard Windows icons and the text 'Work Order Wizard'. Below the title bar is a 'Wizard' tab. The main interface is divided into several sections. On the left, there's a 'Wizard' pane with icons for 'Save and Close Finish', 'Clipboard' (Copy, Paste, Cut, Delete), 'Previous Next' (Navigation), and 'Cancel and Close Exit'. The main area has tabs for 'Task I.D.', 'Task Type', 'Scheduling', 'Recurring', 'Personnel', 'Assignments', and 'Instructions'. The 'Assignments' tab is currently selected. It contains three sections: 'Machine Assignment' with a text field containing 'High Pressure Air Compressor' and a dropdown arrow; 'Classification Assignment' with a text field containing 'Support Equipment' and a dropdown arrow; and 'Work Requested By' with a text field containing 'Richards, Gary' and a dropdown arrow. The 'Work Requested By' field has a yellow background.

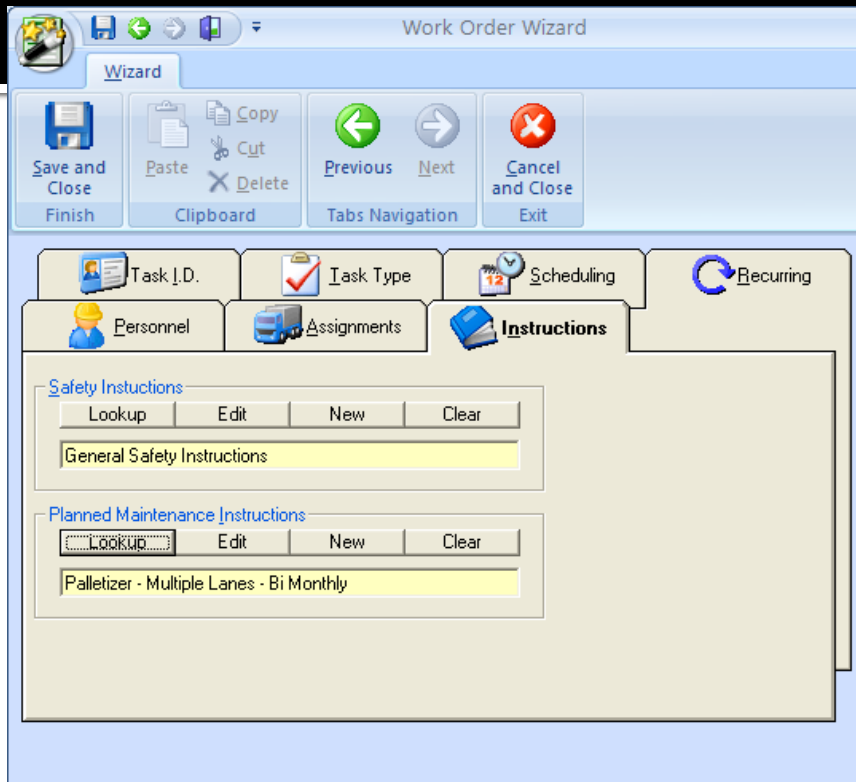
The Work Requested By field just tells us who requested that this work be done. This could be your system administrator, or any one else in your organization for that matter.

NOTE: Fields with a Yellow background are locked and do not allow direct typing in them. If the field has a different background you can type the information directly into that field, such as the Work Requested By field.

To make a Work Requested By Assignment:

- Click on the ... box next to that field.
- Select the Person's name by clicking on then from within the Pop-up list.
- Click the SELECT button.
- Click the NEXT button to move to the next step or tab.

SAFETY INSTRUCTIONS



Every work order should have a set of safety instructions assigned to it.

Safety Instructions, like task instructions for recurring tasks are reusable. You just create them once and then reuse them over and over again as needed.

To select your safety instructions:

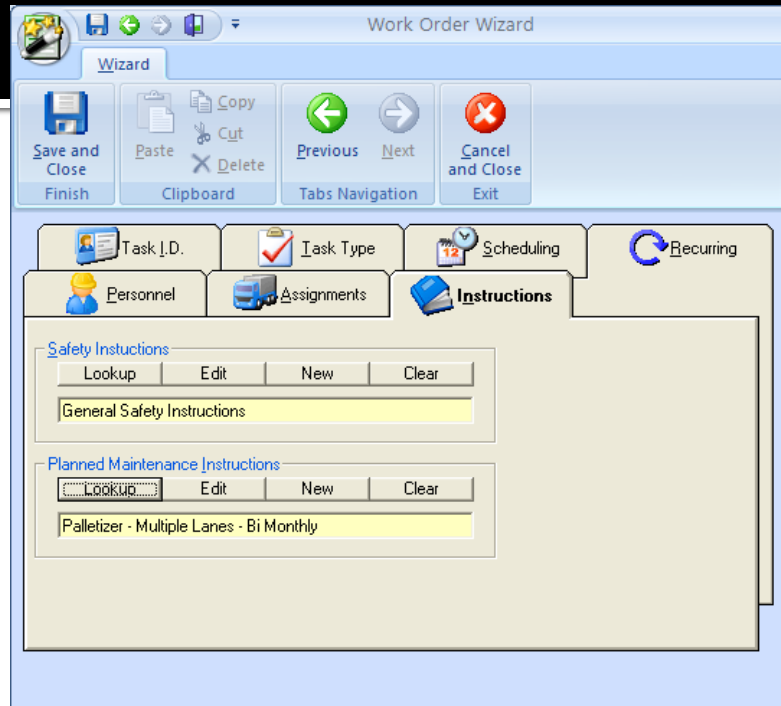
- Click on the LOOKUP button in the Safety Instructions area.
- Select the Instructions of your choice by clicking on then from within the Pop-up list.
- Click the ACCEPT button.

TASK INSTRUCTIONS

The screenshot displays the 'Work Order Wizard' application window. At the top, there is a toolbar with icons for saving, navigating, and exiting. Below the toolbar, a 'Wizard' tab is active. The main area contains several tabs: 'Task I.D.', 'Task Type', 'Scheduling', 'Recurring', 'Personnel', 'Assignments', and 'Instructions'. The 'Instructions' tab is currently selected. It features a 'Safety Instructions' section with a text area containing 'General Safety Instructions' and buttons for 'Lookup', 'Edit', 'New', and 'Clear'. Below this is a 'Work Order Instructions' section with a larger text area containing the text 'Please repair the main entry door' and a small icon of a notepad and pencil.

For Repair types of work orders you need to type in what work to perform in the Work Order Instructions field.

TASK INSTRUCTIONS



Task Instructions for Recurring types of work orders are just like Safety Instructions where you chose the instructions from a list.

To select your task or work instructions:

- Click on the LOOKUP button in the Planned Maintenance Instructions area.
- Select the Instructions of your choice by clicking on then from within the Pop-up list.
- Click the ACCEPT button.
- Click the FINISH button.

YOU'RE DONE!

ABC Maintenance Company
Office of Facilities Support
14 and C Streets
Washington, D.C 20228

Work Order
03-12-603

Bulk Palletizer, Line 1 Planned Maintenance, Scheduled: Bi-Monthly
Planned Maintenance

SCHEDULE AND DETAILS

Current Date/Time:	11/23/2002 8:00 AM	Created and By:	11/23/2002 5:00 PM
Classification:	Line 1	Down Time:	
City & Region and Zip:		Date Expired:	12/31/2002
Work & Equipment:	James R. Wilkinspoon		

EQUIPMENT DETAILS

Equipment:	Bulk Palletizer, Line 1	Equipment Location:	Packaging Area
Serial No.:		Location:	
Building:	Main Floor	Room:	

PROPERTY OF FACILITY

Property:	Contract
Add res:	Title
Add res:	Phone
City:	State/Postal Code

SAFETY INSTRUCTIONS

Lock the lock out, tag out, procedure to eliminate all electrical, mechanical, and hydraulic hazards from the equipment being serviced. Guard all areas that will remain exposed and remain a hazard. Ensure all personnel are clear of the equipment before placing it back into service.

COMMENTS

TASK INSTRUCTIONS

PALETTE MAKING INSTRUCTIONS

- Wipe table top conveyor with alcohol
- Clean sensors, photo-eyes, and reflectors on table top conveyor
- Evacuate any water accumulated in water collection tube
- Wipe infeed table top conveyor with alcohol
- Wipe all infeed table guide rails with alcohol
- Clean all photo-eyes and reflectors in row former lines
- Clean all photo-eyes and reflectors on load table
- Check and clean vacuum cups and visual of any fiber obstruction
- Lube all shafts of the totem gear, layer scope, slip sheet bin, top frame bin, and of table scope
- Lube transfer cartage and transfer plate
- Lube all shafts of the totem sheet dispenser and pallet finger
- Check and grease on all spindles and end of shaft bearings for right roll - lubricate as needed
- Clean photo-eyes and reflectors in table area
- Wipe all dust collected where ever accumulated
- Check palletizer oil reservoir and refill if necessary
- Check all wheels on cartage, layer rack, row former, and top frame dispenser for right roll
- Clean and grease motors and bearings every 50 degree row former up/down (forward/reverse), row former table, accumulation table, layer scope, transfer plate, and pallet discharge conveyor
- Check row and table that retain the layer rack, totem sheet dispenser, and layer scope
- Check 50 degree row former for empty pallet conveyor
- Check pallet alignment for totem sheet placement and layer placement
- Check empty pallet conveyor for problems when doing - i.e. - pile, binding
- Check that row former drive chain is secured in position properly

Basically you're done creating a Planned Maintenance task that will repeat itself over and over again as needed.

There are however other elements of the work order that you may want to explore using the tabs of the main Scheduler. These are setting up the automatic sending of emails when the task becomes due, setting the 'Do Not Generate New Until Done' feature, adding required parts, tracking labor costs and more.