

Simplicity Software Technologies Inc. Presents

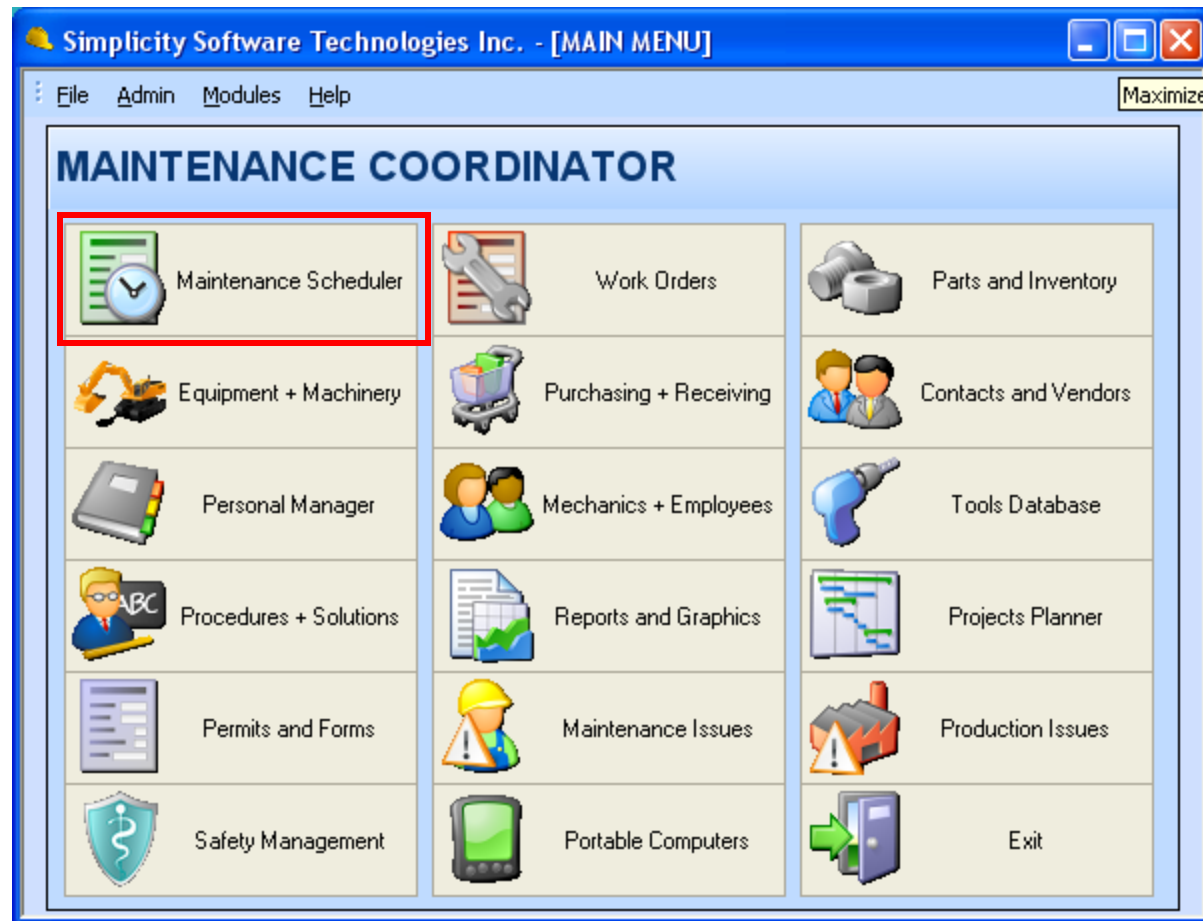
Creating a New Planned Maintenance Task



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

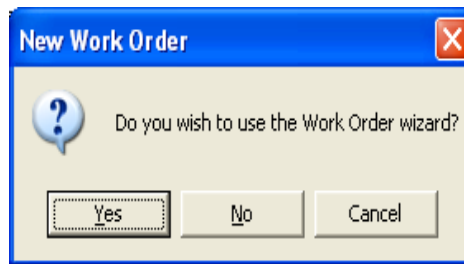


Click the add new icon in the toolbar, or open the Application menu and select the **ADD NEW WORK ORDER** option

The screenshot displays the 'Maintenance Coordinator - [Maintenance Scheduler]' application window. The interface includes a sidebar with navigation options like 'Scheduler', 'Tasks Planner', and 'Tasks Calendar'. The main toolbar contains several icons, with the 'Add New Record' icon (a green plus sign) highlighted by a red rectangle. Below the toolbar, the 'Task Description' field is set to 'Remount propane tank rack' and the 'Task ID' is '0709-36'. A table below shows a list of tasks with columns for Task ID, Description, Created, and Star.

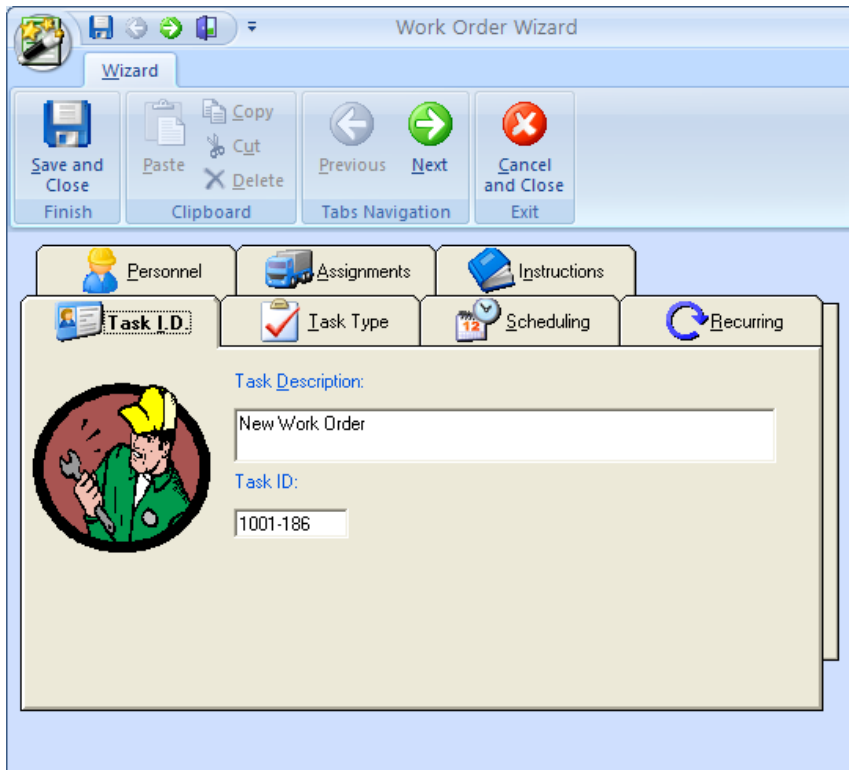
Task ID	Description	Created	Star
1	0709-36 Remount propane tank rack	11/26/2007	07/10/2008
2	0709-37 Bolts on top dispenser needs tightening	10/09/2007	12/12/2007
3	0709-38 Case Palletizer (PALL0002) Planned Main	09/08/2007	01/10/2008
4	0709-39 Case Palletizer (PALL0002) Planned Main	09/08/2007	12/10/2007
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

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



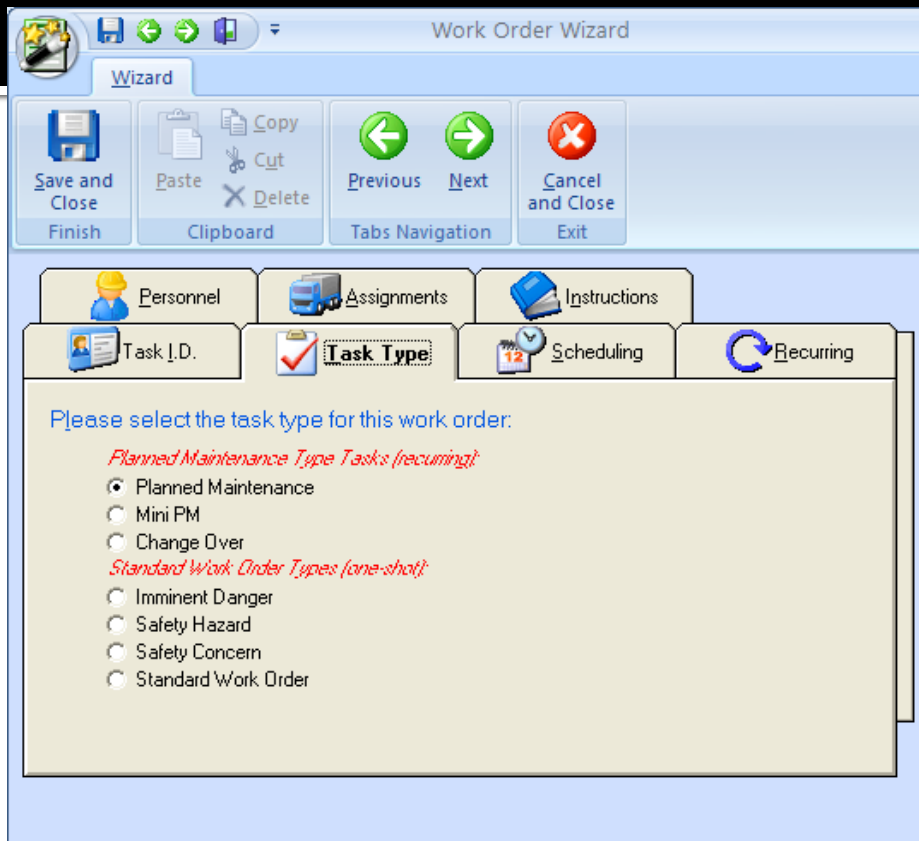
The screenshot shows the 'Work Order Wizard' application window. The title bar reads 'Work Order Wizard'. Below the title bar is a 'Wizard' tab. The main interface is divided into several sections:

- Top Bar:** Contains icons for 'Save and Close' (Finish), 'Clipboard' (Paste, Cut, Delete), 'Tabs Navigation' (Previous, Next), and 'Cancel and Close' (Exit).
- Navigation Tabs:** 'Personnel', 'Assignments', 'Instructions', 'Task I.D.', 'Task Type', 'Scheduling', and 'Recurring'. The 'Task I.D.' tab is currently selected.
- Form Fields:**
 - Task Description:** A text input field containing 'New Work Order'.
 - Task ID:** A text input field containing '1001-186'.
- Illustration:** A cartoon character wearing a yellow hard hat and a green jacket, holding a wrench, is positioned to the left of the form fields.

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



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 'Save and Close', 'Clipboard', 'Tabs Navigation', and 'Exit' buttons. Below the toolbar are tabs for 'Personnel', 'Assignments', and 'Instructions'. The 'Scheduling' tab is selected, showing a form with the following fields:

Field	Value
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



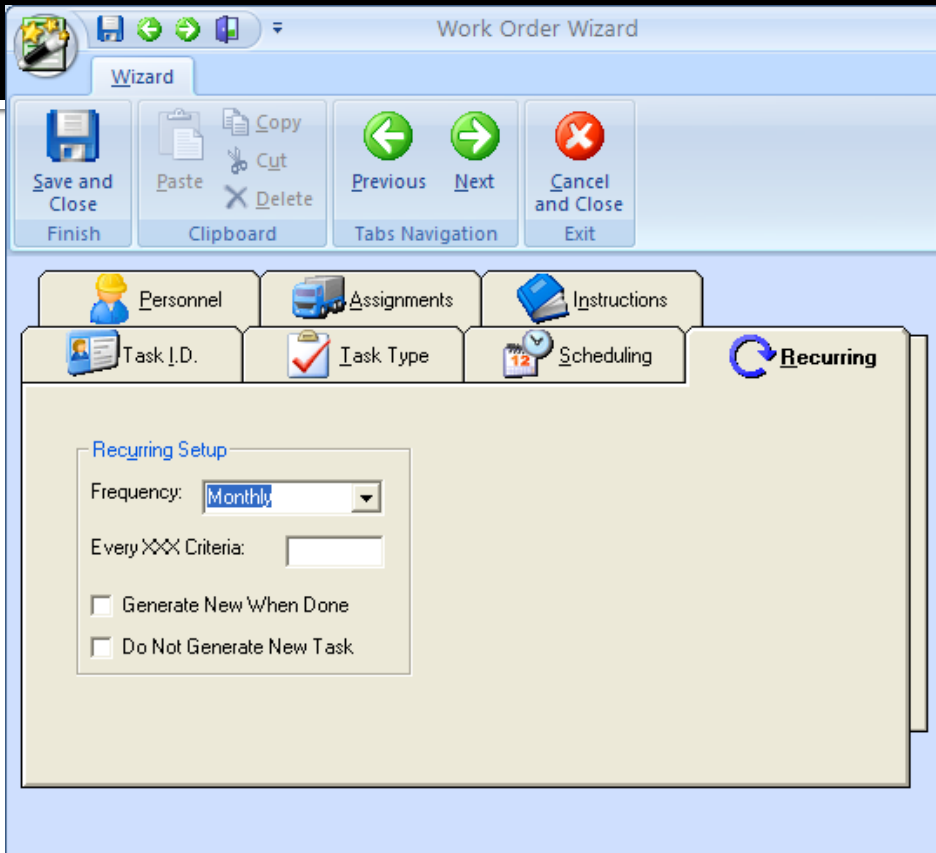
To use the Pop-up Calendar:

- 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



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' application window. The title bar includes standard Windows icons and the text 'Work Order Wizard'. Below the title bar is a 'Wizard' toolbar with buttons for 'Save and Close', 'Clipboard', 'Tabs Navigation', and 'Exit'. The main area contains several tabs: 'Personnel', 'Assignments', 'Instructions', 'Task I.D.', 'Task Type', 'Scheduling', and 'Recurring'. The 'Recurring' tab is active, displaying a 'Recurring Setup' dialog box. This dialog box has a 'Frequency' dropdown menu set to 'Monthly', an 'Every XXX Criteria' text input field, and two checkboxes: 'Generate New When Done' and 'Do Not Generate New Task', both of which are currently unchecked.

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

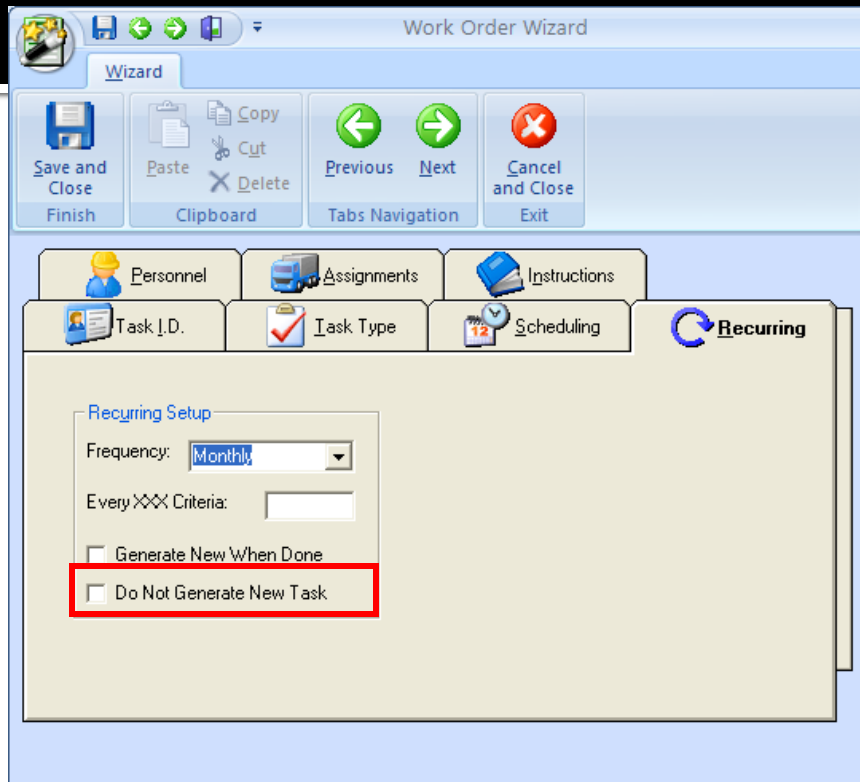
For example, choosing the 'Every XX Units' frequency requires you to also setup the 'Every XXX Criteria', where this information spells out how often to repeat the task.

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



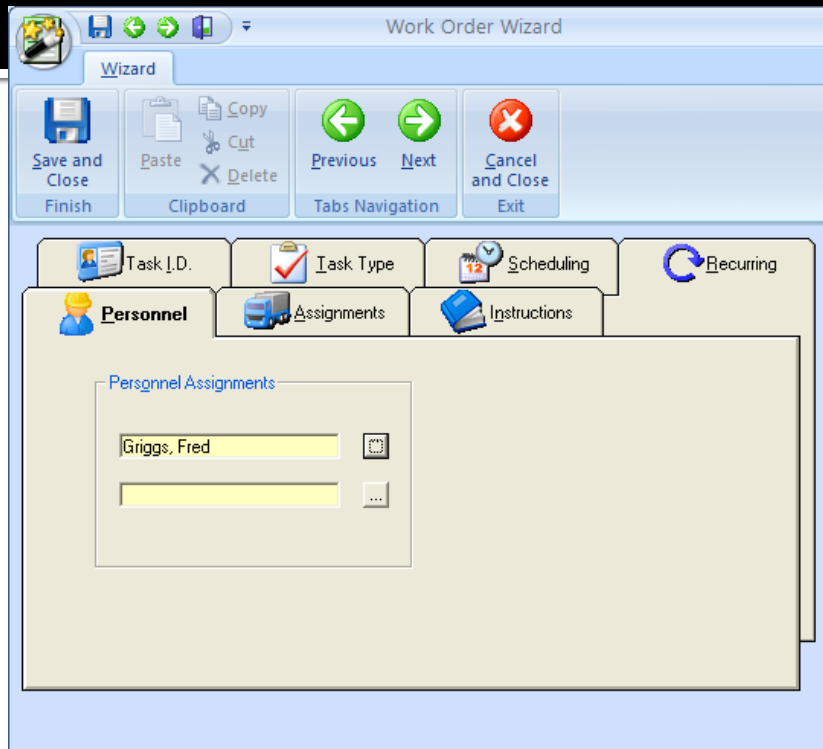
A note about the DO NOT GENERATE NEW TASK checkbox:

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

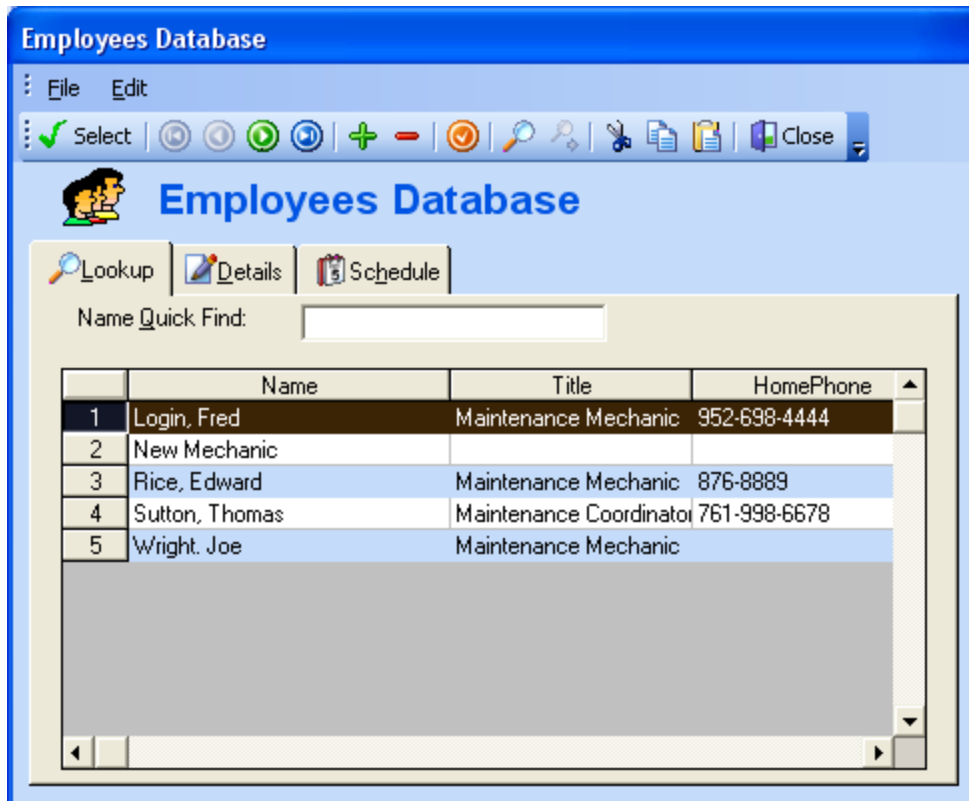


With Personnel Assignments you actually assign the work order to mechanics so they can perform the required tasks to complete the work order.

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

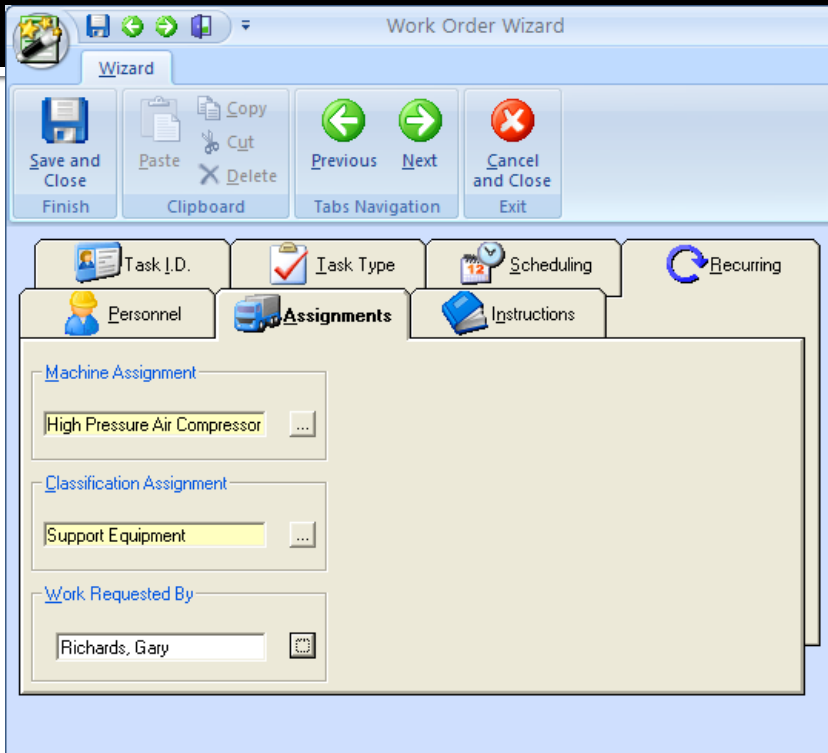
On the Assignments tab you assign the following to your task:

- 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. The title bar reads 'Work Order Wizard'. Below the title bar is a 'Wizard' toolbar with icons for 'Save and Close Finish', 'Clipboard' (Paste, Copy, Cut, Delete), 'Tabs Navigation' (Previous, Next), and 'Cancel and Close Exit'. Below the toolbar are several tabs: 'Task I.D.', 'Task Type', 'Scheduling', 'Recurring', 'Personnel', 'Assignments', and 'Instructions'. The 'Assignments' tab is active, showing three sections: 'Machine Assignment' with a dropdown menu containing 'High Pressure Air Compressor', 'Classification Assignment' with a dropdown menu containing 'Support Equipment', and 'Work Requested By' with a text field containing 'Richards, Gary'.

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

Work Order Wizard

Wizard

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

Task I.D. | Task Type | Scheduling | Recurring | Personnel | Assignments | Instructions

Machine Assignment: High Pressure Air Compressor

Classification Assignment: Support Equipment

Work Requested By: Richards, Gary

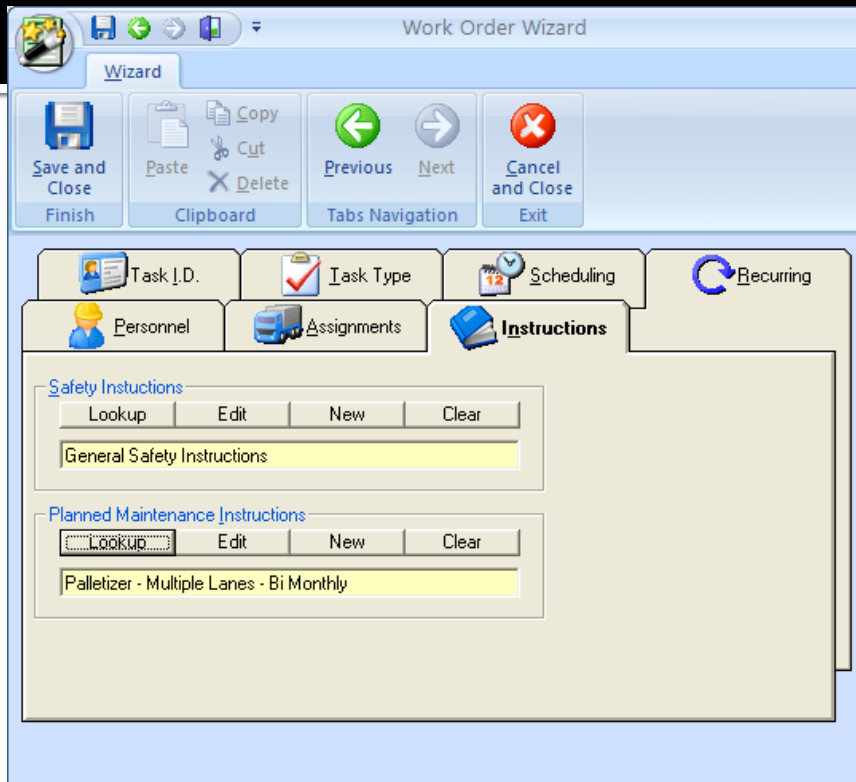
The Work Requested By field just tells us who requested that this work be done. This could be your system administrator, or any one else in your organization for that matter.

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:

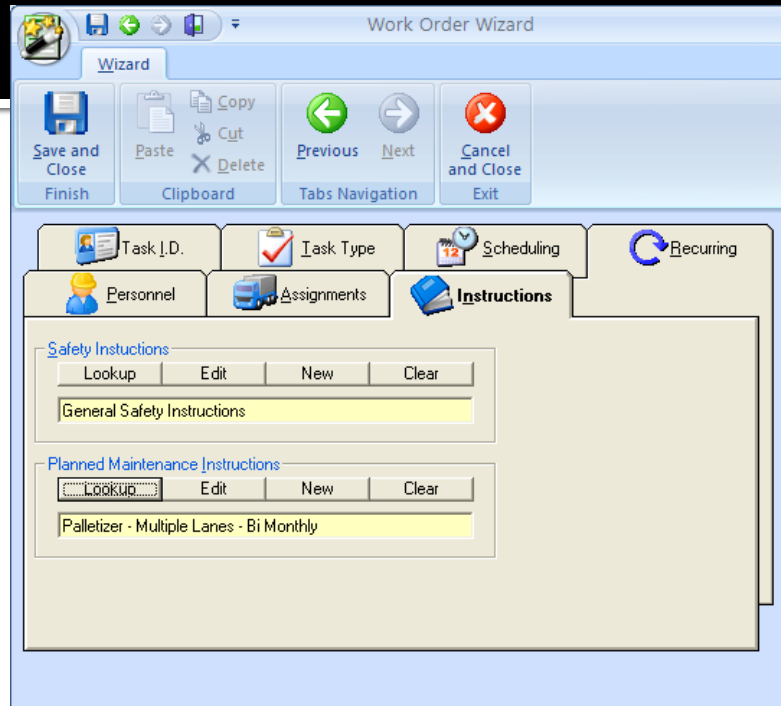
- Click on the LOOKUP button in the Safety Instructions area.
- Select the Instructions of your choice by clicking on then from within the Pop-up list.
- Click the ACCEPT button.

TASK INSTRUCTIONS

The screenshot displays the 'Work Order Wizard' application window. At the top, there is a title bar with the text 'Work Order Wizard' and a standard Windows-style toolbar with icons for file operations. Below the title bar is a 'Wizard' ribbon with several groups of buttons: 'Save and Close' (Finish), 'Clipboard' (Paste, Copy, Cut, Delete), 'Tabs Navigation' (Previous, Next), and 'Cancel and Close' (Exit). The main area of the wizard is divided into several tabs: 'Task I.D.', 'Task Type', 'Scheduling', 'Recurring', 'Personnel', 'Assignments', and 'Instructions'. The 'Instructions' tab is currently selected and active. Within this tab, there are two text input areas. The first is labeled 'Safety Instructions' and contains the text 'General Safety Instructions'. The second is labeled 'Work Order Instructions' and contains the text 'Please repair the main entry door'. The 'Work Order Instructions' field has a small icon of a document with a pencil in the top right corner, indicating it is a rich text or editable field.

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

SCHEDULING AND DETAILS

Start Date/Time	11/23/2002 8:00 AM	Start and End	11/23/2002 3:00 PM
Location	Line 1	Done Time	
Work Order and By	Jared for Willemsson	Date Reported	12/31/2002
Work Category			

EQUIPMENT DETAILS

Equipment	Bulk Palletizer, Line 1	Equip. Reference	
Location	Main Floor	Room	Packaging Area

PROPERTY OF FACILITY

Property	Contract
Address	Title
Address	Phone
City	State/Postal Code

SAFETY INSTRUCTIONS

Lock the lock out tag out procedure to remove all electrical, mechanical, and hydraulic energy from the equipment being serviced. Block 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

HAZARD IDENTIFICATION AND PRECAUTIONS

- || Wipe table top conveyors with alcohol
- || Clean sensors, photo-eyes, and reflexes 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 reflexes in row former lines
- || Clean all photo-eyes and reflexes on load table
- || Check and clean vacuum cups and visual of any fiber obstructions
- || Lube all shafts of the table top stops, layer stops, slip sheet bin, top frame bin, and of table stop pins, transfer cartage and transfer plate
- || Lube all shafts of the totem sheet dispenser and pallet fingers
- || Check and cross on all spindles and end of shaft bearings for tightness - lubricate as needed
- || Clean photo-eyes and reflexes in hose area
- || Wipe all dust collect at where ever accumulated
- || Check palletizer oil reservoir and refill if necessary
- || Check all shafts on cartage, layer stop, row former, and top frame dispenser for alignment
- || Clean and inspect motors and bearings every 50 degree row former up / down / forward / reverse, row former table, accumulation table, layer stop, transfer plate, and pallet discharge conveyors
- || Check row and table that strain the layer stop, totem sheet dispenser, and layer stop
- || 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 taking - i.e. - jam, binding
- || Check the row former drive chain, secured in frame 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.