

## Planned Maintenance

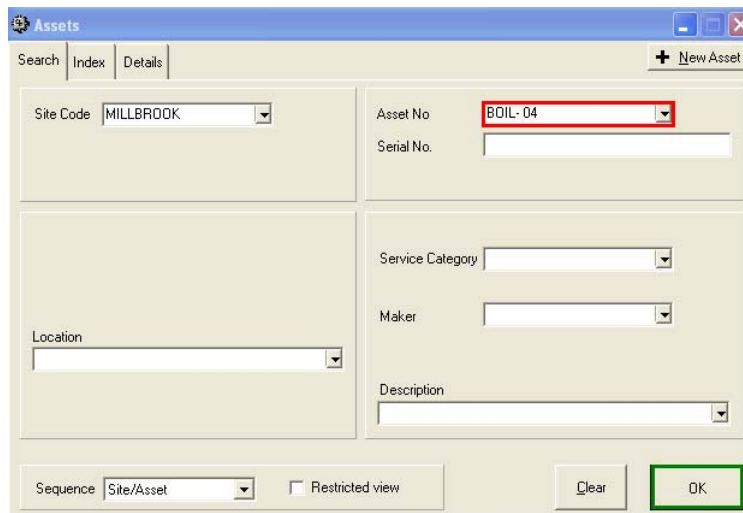
Having created your asset(s) on your site(s), along with the task(s) that you wish to carry out on a regular (scheduled/ planned/ calendar) basis, this chapter will show you how to pull those two components together to produce Planned Maintenance. For the purposes of this overview we will be using the existing Demo Data set.



Fig. 1

From the Planned Maintenance System Toolbar select the **Asset** icon. (See Fig. 1)

The Search screen will appear. Select the Asset that you wish to add planned maintenance to and click on the **OK** button. In our example we are using the Asset created in previous chapters, **BOIL-04** (See Fig. 2)



The screenshot shows a window titled "Assets" with tabs for "Search", "Index", and "Details". The "Search" tab is active. The window contains several input fields: "Site Code" (MILLBROOK), "Asset No" (BOIL-04), "Serial No.", "Service Category", "Maker", "Location", and "Description". At the bottom, there is a "Sequence" dropdown (Site/Asset), a "Restricted view" checkbox, and "Clear" and "OK" buttons.

Fig. 2

## Shire Systems – FrontLine System Overview



The selected Asset will appear in the “Index” view (not shown), **Click** on the **Detail** tab to open this screen. Click on the “+” symbol (highlighted green) to add a planned task to this asset. (See Fig. 3)

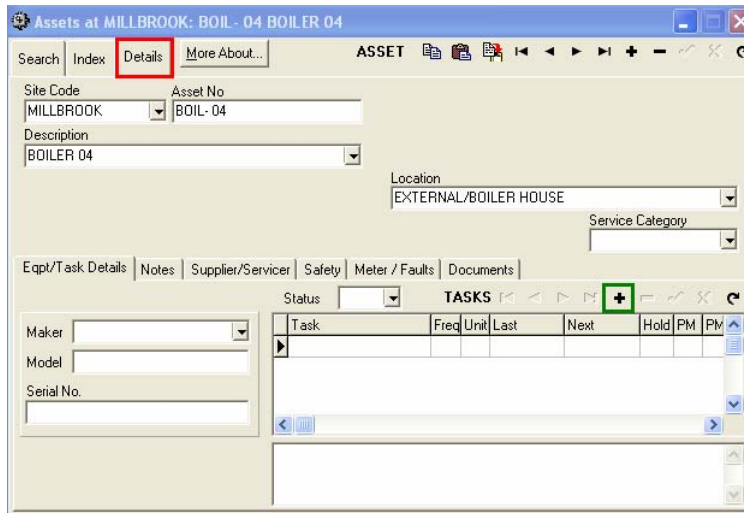



Fig. 3



Next, **Click** in the right hand side of the field under the word Task – A box will appear with three dots in it (highlighted in green). See Fig. 4.

**Click** on the box 

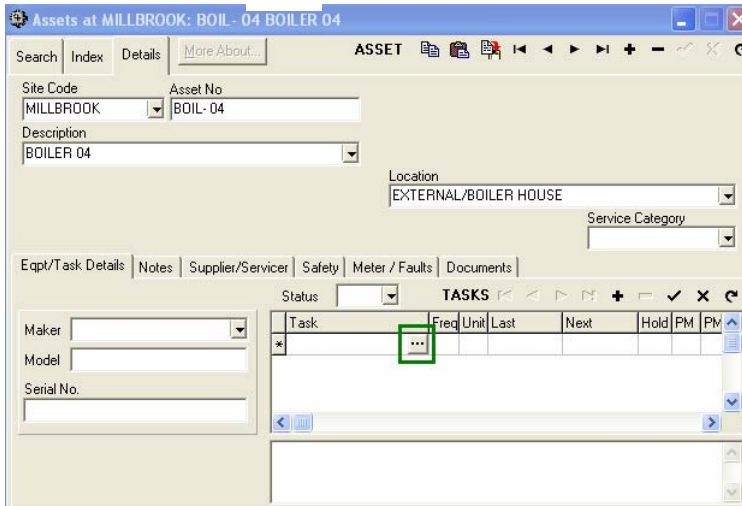
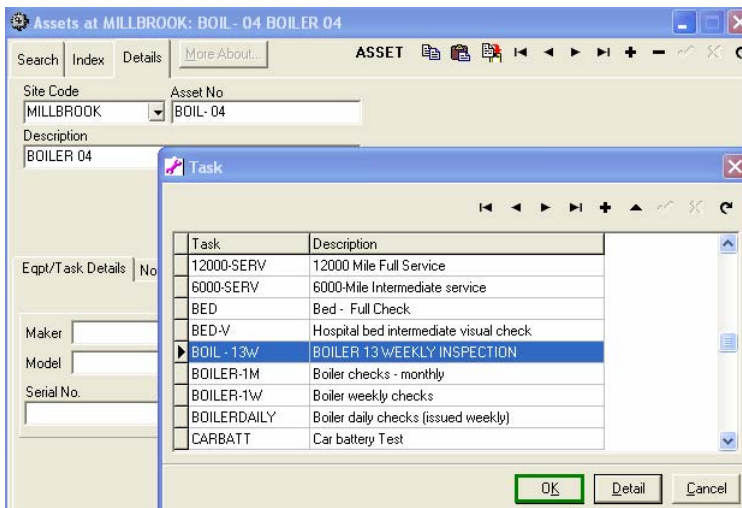


Fig. 4

Select the task that you wish to add to the asset – use the task we created in previous chapters (**Boiler 13 Weekly Inspection**) and **Click** the **OK** button. See Fig 5.



Demo Data set showing other tasks already created

Fig. 5

## Shire Systems – FrontLine System Overview



You can click “+” again to add another task to this asset or the “✓” symbol to save the entry. **Click** on the “More About” button and from the menu select “Planner”. See Fig 6.

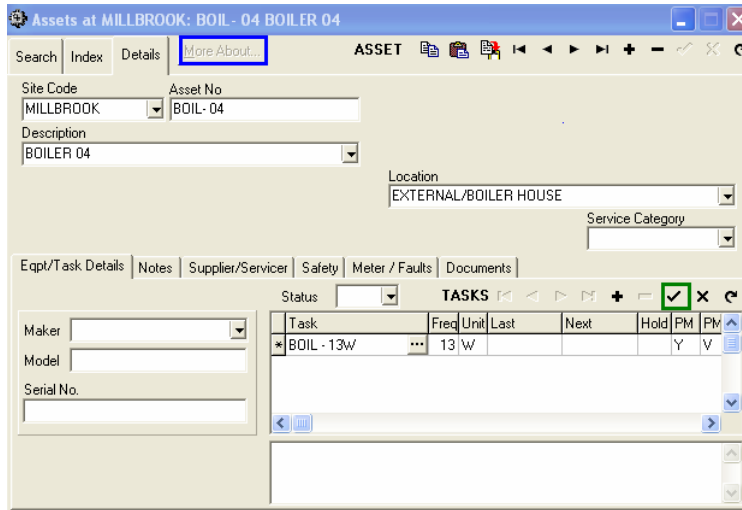
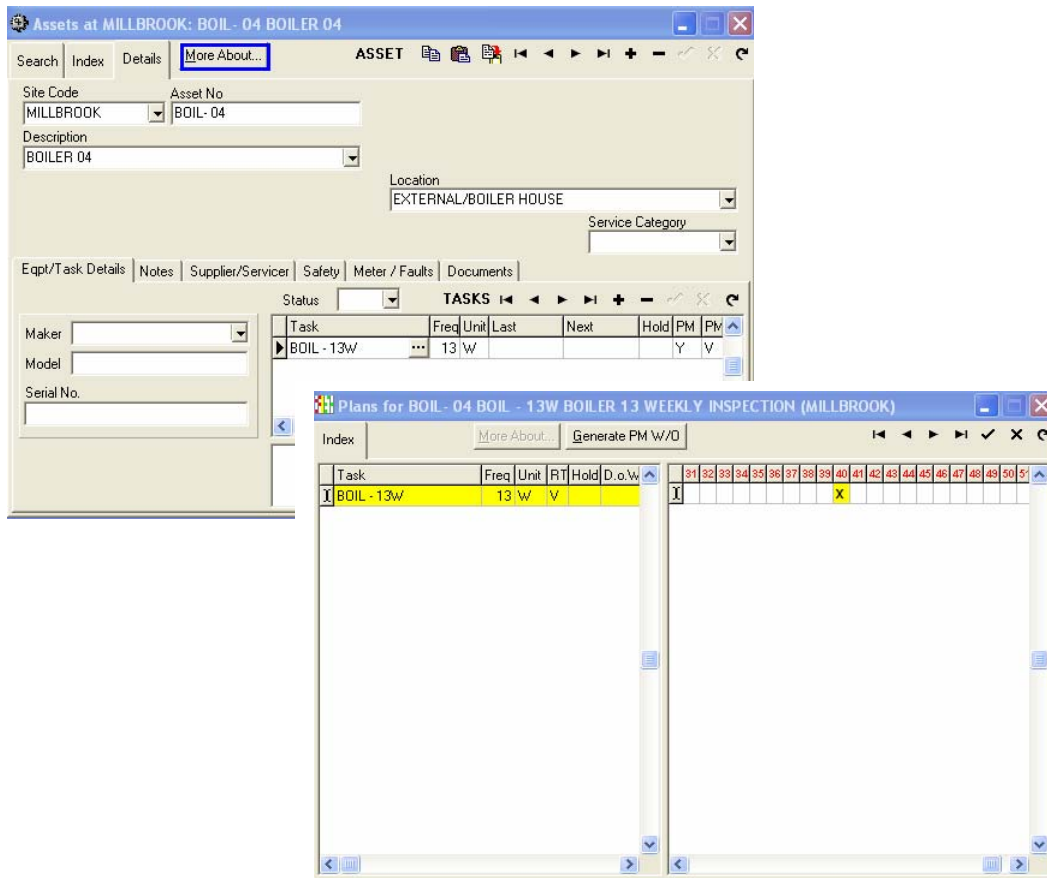


Fig. 6

# Shire Systems – FrontLine System Overview



Planner selected from "More About" menu  
Fig 7

A Planner will display for this asset showing planned tasks (in this case only the one we created for this exercise). The planner gives a 2-year view, broken down into weeks. The week number will depend on when you are evaluating the software. (See Fig. 7)



This job is one you ‘plan to do’. To turn it into an actual job with an associated Work Order (job sheet) attached. **Click** on the “**Generate PM W/O**” button - highlighted green. (See Fig. 8)

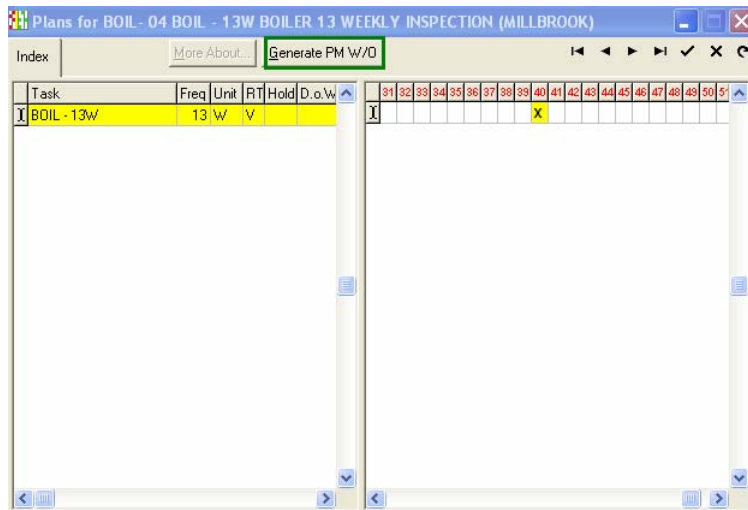


Fig. 8

The following screens appear:

**Confirm** – To confirm the highlighted fields (tasks & assets) to generate planned maintenance against

**Generate PM Work Order** – To be able to select which week (and year) that you wish to generate planned maintenance for.

**Information** – To tell you how many work orders have been generated and the range of work order numbers.

(See Fig. 9)

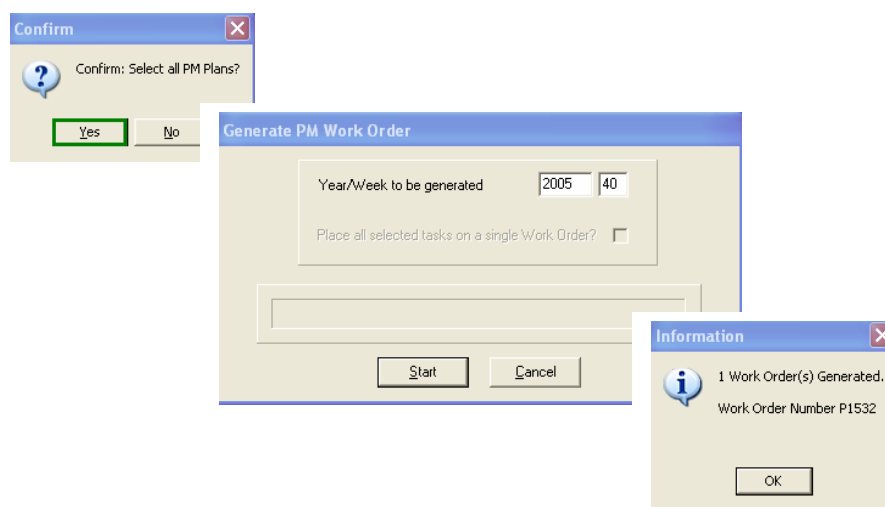


Fig 9



The “X” on the planner now changes automatically to a “W” (Known in the system as a Work Order Status change – status ‘W’ = “Work In Progress”). By double clicking on the “W” you will be able to open up the associated work order. (See Fig. 10)

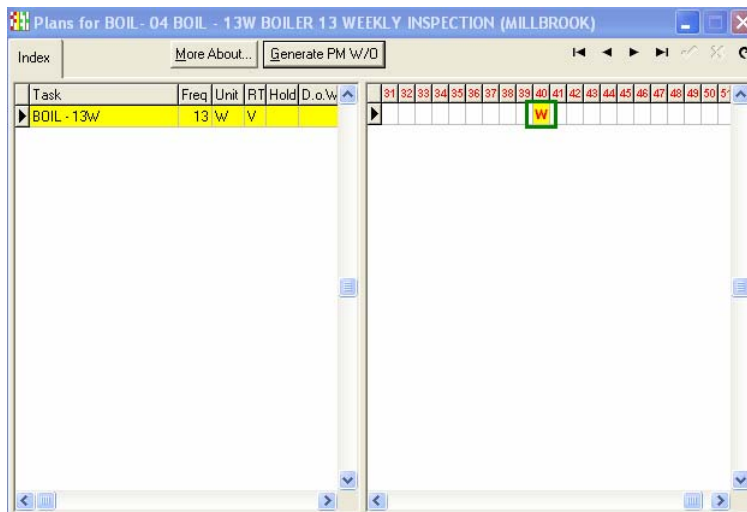


Fig 10

## Planned Maintenance

This work order can now have further information added, if desired e.g **start time and date, planned person/team/trade assigned and notes.**

Work Orders for planned maintenance are normally printed off in “Batches” (through the report menu) but they can also be printed individually (as highlighted), sent to a designated hand held device or left on the screen to be actioned. (See Fig. 11)

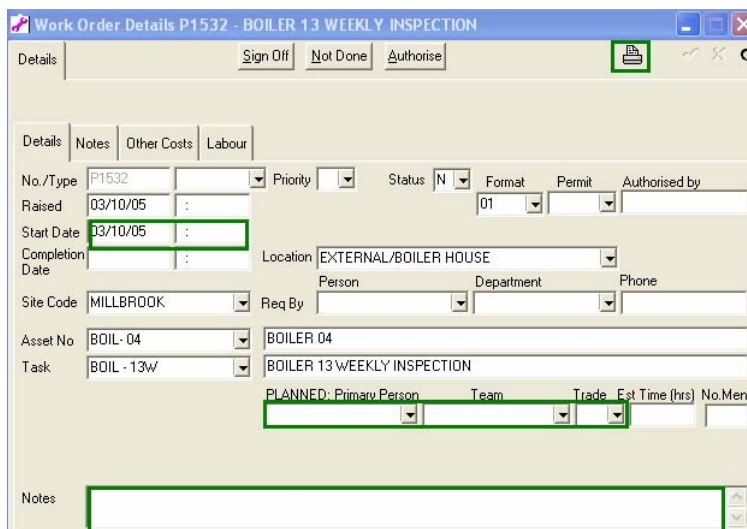


Fig 11