

# **Maintenance Plans/ Preventive Maintenance**

## **How do I add documents and files to work orders generated from maintenance plans?**

If you would like to add documentation such as equipment datasheets or lock-out tag-out tag templates for certain periodic jobs, proceed as follows:

1. create your source work order BUT do not attach files and documents when you create the work request. That information will be assigned to the work request/ work order only and will not be propagated to the automatically generated orders.
2. Create the maintenance plans as outlined here: <http://commacmms.com/site/faq/index.php?action=artikel&cat=4&id=20&artlang=en&highlight=maintenance+plan>
3. Find the maintenance plan you just created on the maintenance plan search console (the last on the list).
4. Click to view and then click the "Edit..." button.
5. Click "View" on the source work order area.
6. Click the "Add" tab and then the "Files" tab.
7. Add a link or upload a file. This file will now be associated with the maintenance plan and attached to all maintenance plan issued orders.
8. TO ADD A FILE DESCRIPTION
  1. Proceed as above but before saving the source work order after attaching the file,
  2. Write the name of the file you just linked or uploaded on the report area, e.g. "Equipment Datasheet"
  3. Save the source work order
  4. A new report with the description you just entered will be saved with the file attached to it.

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