

# Basic Tutorials

## Session 4 - Preventive Maintenance - Recurring Work Orders (time: 10 minutes)

### Assumptions

1. You have implemented the Work Order workflow described in session 3.

### Notes

1. Automatic Work Orders are triggered by:
  - a **scheduled event rule** (e.g. "the first day of each month")
  - a **counter cycle rule** (e.g. "Every 10,000 Km")
  - a **combination of the two events** above (e.g. "The first of every month or every 10,000 Km, whichever comes first")
2. The triggering rules described above are stored and edited through a "Maintenance Plan".
3. When the system generates an automatic Work Order, it copies the information exactly as it is stored on a "Source" (= template) Work Order. That template is called a "Maintenance Plan Work Order Source".

### Proceed as Follows

1. **Create the Source Work Order (same procedure as for a normal work order):**
  - Go to "Maintenance" → "Create Wrequest".
  - On the "**Target FL**" fields, select the functional location the request refers to
    - Select your plant on the top dropdown and wait for the field under it to load.
    - Select Level 0 "MACH" and wait for the field under it to load
    - Select Level 1 "PROD1" and wait for the field under it to load
    - Select Level 2 "MACH1"

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- The current work request is now assigned to Machine 1
- Set “**Type**” to “PREVENTIVE” (know more about WO types: <http://goo.gl/FY14nN>).
- Set “**Priority**” to “P3-Normal”.
- In the “Enter Information” area, enter under “**Summary**” - “Regular Monthly Actions”
- In the “Enter Information” area, enter under “**Description**” - “1. Drain oil 2. Replace filter element 3. Refill with clean oil”.
- Click “Create”.

The source Work Order (at this point, still only a regular Work Request) has been created but we need to tell the system this is a special one.

## 2. Convert work request into a Maintenance Plans Work Order Source

- Go to “Maintenance” → “Work Orders” and find the order you just created on the list (it should be the top row). Click on the WO# for that row.
- Scroll down until you see the “Operations” menu on the left side. Click the “Convert to MPlan” link.
- For “Description” enter: “ Regular Monthly Actions on Machine 1”.
- Check the “Delete source WO after MPlan creation”. Here you tell the system that you have created this work order only to create a source out of it. If you keep this option unchecked, the work request you generated will not only be a maintenance plan source but it will also remain as a normal work order that requires the full work order work flow.
- On the “WO Scheduling Options” select the “both (whichever comes first)” option.
- Set start date as today and select the “Issue on day” option. Leave the drop down menus as they are (issue on day 1 of every month). You completed the calendar scheduling portion.
- To set the counter value, enter “5000” on the text field.
- Click “Create MPlan”.

You have finished creating your Recurring Work Order

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## Status after Session 4

You have now implemented the ability to document and log details of sporadic and recurring maintenance actions.

## Coming Next

Setup an equipment movement workflow which will allow you to know where each device is and was throughout its life from the day it was bought to the day it is disposed of).

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