

# Basic Tutorials

## Session 10 - Job Plans (time: 15 minutes)

### Assumptions

1. You have completed sessions 1 to 9.

### Notes

1. "Job Plans" aggregate groups of orders that you can plan for execution.
2. "Job Plans" provide a work report area that may include overall recommendations for the group of orders that is being planned.
3. "Job Plans" are useful during plant or machine overhauls where typically there are several jobs that need to be done within a certain time frame.
4. If you do not need to plan your work or if you plan to do it at a later stage, feel free to skim through this session.

### Proceed as Follows

#### 1. Create a Job Plan

- Go to "Maintenance" → "Job Planner" and click the "+Job Plan" button on the top right.
- Under the "General Information" area, enter:
  - "Test job plan" as the "Job Plan Name"
  - "Test job plan description" as the "Short Description"
  - Click the "Start Date" text field and enter the 1<sup>st</sup> of the current month by clicking on the number 1 on the calendar window.
  - Click the "End Date" text field and enter the last day of the current month by clicking the last day of the current month on the calendar window.
- Click the "add" button at the bottom.
- The "Edit Job Plan" view will open for the plan you just created. Do not navigate away from this page.

You have created an empty job plan. You can add manual entries to the plan or

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import lists of work orders on to it.

## 2. Add a Manual Item to a Job Plan

- On the “Note” text field, enter “Machine Overhaul Meeting #1”.
- Leave the “Start” date as it is but change the start time (top drop down with a “0”) to “9”. This means 09:00 am.
- Change the “End” date to the same day as the Start Date (should be the first of the current month) and change the “End” time to “10”. This means 10:00 am.
- Click the “+” button.
- The information you entered is added to the job plan contents and the gantt chart at the top is updated on the fly to show a graphical representation of the duration of the item you just created.

You have added a manual entry to a job plan. This is useful for items that are not supported by a work order but are still part of a job plan (e.g. daily follow-up meetings for a machine overhaul).

## 3. Import Work Orders to a Job Plan

- Go to “Maintenance” → “Work Orders”.
- Click “Add Results to Job Plan”. The “Job Plan” window will open.
- Select the Job Plan you created above from the drop down menu (may be the only option available in case you have not created job plans before this session).
- Click the “Add” button. The system should show a success message under the drop down list.

You have imported a list of work orders to your job plan. Usually you would set more advanced search criteria such as filtering for all the orders that are pending for a certain machine.

## 4. Confirm Upload and Plan the Jobs

- Go to “Maintenance” → “Job Planner” and click the “Edit” link on the row of the job plan you created on this session.

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- You will see that the order(s) you imported are now shown on the list and on the gantt chart. The start and end times will default to the start and end times of the job plan. Lets modify that:
  - scroll down to the job plan contents table and focus on one of the work order(s) that was imported (any row with a number under the "WOID" column).
  - Double click the end date text on that row. Change it to the day after the start of the project. You do not need to press enter. The text will refresh to the date you selected and the gantt chart above will adjust to show your revised time frame for that job.

You have planned the start and end time for a job inside a job plan.

## 5. Finish a Job Plan

- On the "Edit Job Plan" page, click the "Job Report" tab.
- Enter "Full machine overhaul complete with no problems. The schedule was successful so a similar plan for this group of jobs may be used in the future".
- Click the "Save Report" button. The page will refresh.
- Select the "Job Plan Status" tab.
- Click the "Set Job Plan as Complete?" switch and set it to Yes. Click the "Save" button and click "OK" on the confirmation dialog.
- Click "View Job Plan" link on the confirmation page.

You have finished a job plan including a final report. This will be of use every time there is a similar overhaul planned for the same machine.

## Status after Session 10

From the very basics to more advanced features, you have addressed most of the functionality of comma CMMS as it stands at this moment in time. There's a little more to learn like search filters or what parameters to set on search consoles, but that will come with time.

## Coming Next

The basic tutorial session is now complete.

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The following websites will provide additional updated information and tips to maximize your comma CMMS usage:

- [Support Site](#)  
Tutorials, how-tos, FAQs, known bug list, release notes
- [YouTube Channel](#)  
Video Tutorials
- [Hint me! tips](#)  
Short tips to improve your comma CMMS knowledge
- [Maintenance Concepts](#)  
Maintenance related articles
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Unique solution ID: #1038

Author: commacmms

Last update: 2015-01-21 09:15