2015 WinNetStar Training Classes

Preventative Maintenance

Software Development-T3

RIMSS Business Systems Technology

Creating Standard Service Issues

Creating a Standard Service Issue is the first step in maintaining a Preventative Maintenance schedule. To create Standard Service Issues go to Service > Preventative Maintenance. This will open a blank screen to Fetch or create new Standard Service Issues. To add a new Standard Service Issue click on Add New. Standard Service Issues are used in Repair Orders in the Service Issue section by clicking on Add Standard Service Issue.

Service Issue Code

Code: ❌

Short Name: ❌

Make: ▼ **Model:** ▼ **Year:**

Description:

Fix:

☐ Inactive

☐ Preventive Maintenance

[OK]

[Cancel]

Issue Code 1 [ ] ···
Issue Code 2 [ ] ···
Issue Code 3 [ ] ···
Issue Code 4 [ ] ···

(Add Op Code)

Op Code	Customer Std Hours Override	Internal Std Hours Override	Warranty Std Hours Override

(Add Inventory Item)

Pricebook	Part Number	OEM Vendor Number	OEM Vendor Division	Qty Required

(Add Misc Charge)

Description	Qty Required

A blank Service Issue allows the user to input a Code, Short Name, Description and Fix. A user can even limit this type of service to a specific Make, Model and Year. Standard Service Issues additionally allow a user to add Op Codes, Inventory Items and Miscellaneous Charges.

Service Issue Code

Code: KUB 500 HR

Short Name: KUBOTA 500 HR PM

Make: [▼] Model: [▼] Year: [ ]

Description:
Perform Engine oil & filter change, Transmission fluid change, Hyd. Oil filter cleaning, Steering gear case oil, Clean radiator screen and check coolant level, Check tire pressure and Check all safety switches for correct operation

Fix:
Performed the above work and verified in working order.

☐ Inactive

☐ Preventive Maintenance

[OK]

[Cancel]

Issue Code 1: [ ] [...]
Issue Code 2: [ ] [...]
Issue Code 3: [ ] [...]
Issue Code 4: [ ] [...]

(Add Op Code)

Op Code	Customer Std Hours Override	Internal Std Hours Override	Warranty Std Hours Override
> CK COOLANT LEVELS [...]	0.10	0.10	0.10
REPL OIL FILTER	0.25	0.25	0.25
TRANS OIL CHANGE	0.25	0.25	0.25
ENG OIL CHANGE	0.50	0.50	0.50

(Add Inventory Item)

Pricebook	Part Number	OEM Vendor Number	OEM Vendor Division	Qty Required
> KUB	15402-32430	620		1.0000
KUB	70000-20000	620		1.0000
261	3405389M2	261		1.0000

(Add Misc Charge)

Description	Qty Required
> HAZARDOUS WASTE	1.0000

In our example, we are creating a Standard Service Issue for a 500 hour PM on a Kubota tractor. There are four Op Codes and the estimated time for each code, three part numbers and one miscellaneous charge.

Service Issue Code

Code: KUB 500 HR

Short Name: KUBOTA 500 HR PM

Make: [▼]   Model: [▼]   Year: [ ]

Description: Perform Engine oil & filter change, Transmission fluid change, Hyd. Oil filter cleaning, Steering gear case oil, Clean radiator screen and check coolant level, Check tire pressure and Check all safety switches for correct operation

Fix: Performed the above work and verified in working order.

☐ Inactive

(OK)
(Cancel)

☑ Preventive Maintenance

Frequency: ○ Initial   ○ Recurring

Measure By: ○ Miles   ○ Hours

Amt of Miles/Hours: 0

Months: 0

Issue Code 1: [...]
Issue Code 2: [...]
Issue Code 3: [...]
Issue Code 4: [...]

(Add Op Code)

Op Code	Customer Std Hours Override	Internal Std Hours Override	Warranty Std Hours Override
> CK COOLANT LEVELS [...]	0.10	0.10	0.10
REPL OIL FILTER	0.25	0.25	0.25
TRANS OIL CHANGE	0.25	0.25	0.25
ENG OIL CHANGE	0.50	0.50	0.50

(Add Inventory Item)

Pricebook	Part Number	OEM Vendor Number	OEM Vendor Division	Qty Required
> KUB	15402-32430	620		1.0000
KUB	70000-20000	620		1.0000
261	3405389M2	261		1.0000

(Add Misc Charge)

Description	Qty Required
> HAZARDOUS WASTE	1.0000

To set this Standard Service Issue as a Preventative Maintenance item check mark the Preventative Maintenance box. This will open the settings in which to monitor this PM. Each PM can have its own frequency of an Initial or Recurring. Initial means that it will only be used once on a unit. Next is the method in which to measure this PM. You can use Miles or Hours and then denote the amount of miles/hours until the next PM is required. Additionally, you can set the number of months in which to track a PM.

Name	Description	Inactive	Last Modified By	Last Modified Date	Filter

[Inactive] = 'False'

Edit Filter
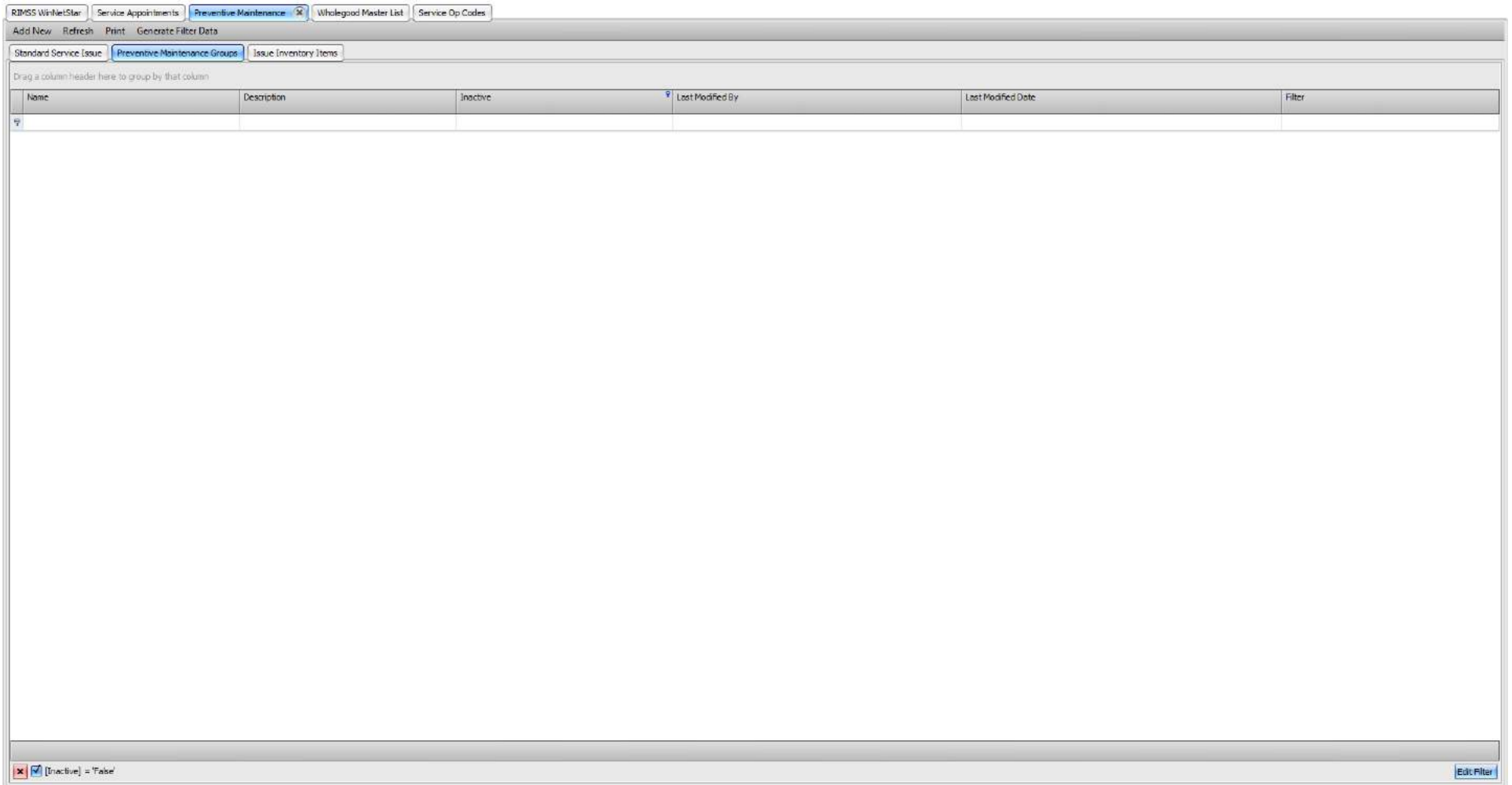
An additional step, allows the user to create PM Groups. Creating groups will allow the user to quickly add Preventative Maintenance Items as a group to a specific unit. To create a group, click on the Preventative Maintenance Groups and click on Add New.

PM Item Filter Lookup

PM Group

Name: KUBOTA PM ITEMS   ☐ Inactive

Description: KUBOTA PM ITEMS|

[Save]
[Cancel]
[Print]

Standard Service Issues

Name: [　　]   Description: [　　]   Is Preventive Maintenance: [All ▼]   [Fetch]

Make: [All ▼]   Model: [All ▼]   Year: [　　]

Drag a column header here to group by that column

Inactive	Name	Description	Issue Description	Fix	Make	Model	Year	Created By Location
	KUB							
False	KUB 500 HR	KUBOTA 500	Perform Engine oil & filter change,	Performed the above work and verified in				RIMSS
False	KUB 1000 HR	KUBOTA 1000	Check tire pressure and Check all safety	Performed the above work and verified				RIMSS

[✕] [✓] [Inactive] = 'False' And Starts with([Name], 'KUB') [▼]   [Edit Filter]

Creating a Group consists of giving this new group a Name and Description. There are pre-fetch filters to search on specific Names, Descriptions, Make, Models or Year of the already created Standard Service Issue. To save a Group, the user must create a filter of the items contained in this group. In our example, the filter is for all Standard Service Issues with Kubota in the name.

Adding PM Items or Groups to Wholegoods

Once you have created your Items or Groups, the next step is to add them any Wholegood that you wish to track. Find the Wholegood that you are adding to your Preventative Maintenance schedule by going to Wholegoods > Find > Wholegood. Open the Wholegood and click on the Preventative Maintenance tab.

From this screen you can add PM Groups and single PM Items.

	Name	Description	Inactive	Last Modified By	Last Modified Date	Filter
>	KUBOTA PM ITEMS	KUBOTA PM ITEMS	False	carl	2/12/2015 4:53 PM	[Inactive] = 'False' And StartsWith([Code], 'KUB')

[Inactive] = 'False'

Edit Filter

OK   Cancel

PM Groups will show the one group that we have created. This will add the two PM items together.

PMItemLookup

Standard Service Issues

Code: [   ] Short Name: [   ] Is Preventive Maintenance: [True ▾] (Fetch)

Make: [All ▾] Model: [All ▾] Year: [   ]

Drag a column header here to group by that column

	Inactive	Code	Short Name	Description	Fix	Make	Model	Year	
⚲									
>	False	KUB 500 HR	KUBOTA 500	Perform Engine oil & filter change,	Performed the above work and verified in				F
	False	KUB 1000 HR	KUBOTA 1000	Check tire pressure and Check all safety	Performed the above work and verified				F

Adding PM Items will allow you add one or more items to a Wholegood. By using the CTRL key the user can click to select multiple items to add.

☒ ☑ [Inactive] = 'False'   Edit Filter

(OK)   (Cancel)

	Group Name	Group Des...	Item Name	Item Descr...	Issue Desc...	Fix Description	Make	Model	Year	Frequency	Measure	Miles	Hours	Months	Has Op Co...	Has Invent...	Date Last ...	Miles Last ...	Hours Last...	Months Sin...	Next Miles	Next Hours	Next Da
↕															☐	☐							
>			KUB 500 HR	KUBOTA 50...	Perform En...	Performed the above work and verified in working...				Recurring	Hours	0.00	500.00	0.00	☑	☑						500.00	
			KUB 1000 HR	KUBOTA 10...	Check tire p...	Performed the above work and verified operational				Recurring	Hours	0.00	1,000.00	0.00	☑	☑						1,000.00	

By adding the two codes to the wholegood, this unit will now track repair orders by the hours used in the PM schedule.

Using a PM on a Repair Order

When creating a Repair Order and the scheduled frequency has surpassed the system will warn the user when saving if they wish to review the scheduled Preventative Maintenance items. To do so, click on Yes.

Any PM Items that are currently due, will show in red. To add the line item to the Repair Order, right click on the line item and select to Add PM to Service Document.

By adding the Preventative Maintenance Item, the service issue has been added with the Description and Fix, Parts have been added to the Items tab and Labor lines have been added to the Labor tab. As normal, all Labor lines will require a technician before you can save the Repair Order.

Group Name	Group Des...	Item Name	Item Descr...	Issue Desc...	Fix Description	Make	Model	Year	Frequency	Measure	Miles	Hours	Months	Has Op Co...	Has Invent...	Date Last ...	Miles Last ...	Hours Last...	Months Sin...	Next Miles	Next Hours	Next Dat
														☐	☐							
		KLB 500 HR	KUBOTA 50...	Perform En...	Performed the above work and verified in working...				Recurring	Hours	0.00	500.00	0.00	☑	☑	2/12/2015		510.00			1,010.00	
		KLB 1000 HR	KUBOTA 10...	Check tire p...	Performed the above work and verified operational				Recurring	Hours	0.00	1,000.00	0.00	☑	☑						1,000.00	

If we refer back to the original unit, the Date Last Performed and Hours Last Performed are updated from the Repair Order. Additionally, any items that require attention will show in red indicating that a required Preventative Maintenance item is overdue.

Reviewing the PM Due Report

RIMSS WinNetStar | Wholegood PM ✕

Refresh　Print　Layouts

System ID [　]　Stock # [　]　Serial # [　]　　Fetch
Customer [　]　Category [All ▼]　Group [All ▼]　Class [All ▼]

Billing Customer Name ▲　　Next Date ▲

	System ID	Stock Number	Serial Number	Description	Fleet Number	Group Description	Item Name	Item Description	Issue Description	Fix Description	Frequency	Measure	Miles	Hours	Current Miles	Customer Name	Current Hours	Months	Has Op Codes	Has Inventory
⊟ **Billing Customer Name:**																				
⊞ **Next Date: January 0001**																				
⊟ **Next Date: December 2011**																				
	10...	2218	5PVNV8JT8...	CM UNIT 2218	2218		ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	44893.0000	DOCUVAUL...	0.0000	0	☑	☐
	10...	2218	5PVNV8JT8...	CM UNIT 2218	2218		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	44893.0000	DOCUVAUL...	0.0000	0	☑	☐
⊟ **Next Date: May 2012**																				
	10...	NPI#828	5PVNV8JT1...	2013 HINO 338	NPI#828		ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	248240.0000	NELLIE'S PR...	0.0000	0	☑	☐
⊟ **Next Date: September 2012**																				
	2414	1351343	5PVNJ8JV5...	2013 HINO 26' RFR L/G	1351343		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	40954.0000		2019.0000	0	☑	☐
⊟ **Next Date: March 2013**																				
	2367	1311458	JALC4W16...	2013 ISUZU 16' DRY L/G	1311458		ATPM-30k	AUTOMATI...	AUTOMATI...		Recurring	Miles	30000.0000	0.0000	29146.0000		0.0000	0	☑	☐
	2400	1341364	5PVNV8JV9...	2013 HINO 338 26 FT C...	1341364		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	79230.0000		0.0000	0	☑	☐
⊟ **Next Date: April 2013**																				
	2247	1131204	5PVNJ8JV5...	2011 HINO 26' DRY VAN ...	1131204		ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	106076.0000		0.0000	0	☑	☐
⊟ **Next Date: November 2013**																				
	10...	1451499	5PVNJ8JVX...	2014 HINO 268A	1451499		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	10905.0000		565.0000	0	☑	☐
⊟ **Next Date: January 2014**																				
	10...	2219	5PVNV8JT3...	CM UNIT 2219	2219		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	28037.0000	DOCUVAUL...	0.0000	0	☑	☐
⊟ **Next Date: February 2014**																				
	3956	SCIW1224	5PVNJ8JV3...	2013 HINO 268A	SCIW1224		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	61127.0000	SOUTH CA...	0.0000	0	☑	☐
⊟ **Next Date: March 2014**																				
	2407	1351287	5PVNJ8JR8...	1287-24' MOR RFR	1351287		ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	119983.0000	BK ENTERP...	4326.0000	0	☑	☐
	3640	89107	5PVNV8JV8...	CM UNIT 89107	89107		AF-36k	AIR FILTER	REPLACE A...	REPLACE A...	Recurring	Miles	36000.0000	0.0000	99244.0000	SERVICE P...	0.0000	0	☑	☐
⊟ **Next Date: April 2014**																				
	2274	1161207	5PVNV8JT4...	2011 HINO 24' MOR RFR...	1161207		AF-36k	AIR FILTER	REPLACE A...	REPLACE 4...	Recurring	Miles	36000.0000	0.0000	138158.0000		7135.0000	0	☑	☐
	15...	2220	5PVNJ8JV0...	CM UNIT 2220	DSS#2220		ATPM-50k	AUTOMATI...	AUTOMATI...		Recurring	Miles	50000.0000	0.0000	9857.0000	DOCUVAUL...	0.0000	0	☑	☐

The above is an example of the PM Due report found in Reports > Wholegoods > Wholegood PM. The report can break out specific PM Items, Descriptions, Fixes, Date Last Performed along with Odometer and Hour collections. This report can be filtered out to include specific items or customers. More importantly, the filter can be created to show only those PM's that are currently due. The red lines indicate those items that are currently due.

The groupings used for this report show Customers and then the Next Date. The grouping on the Next Date is additionally arranged using the Group Interval option of Month. This will allow the user to contact customers with expired or soon to be expiring Preventative Maintenance items.