Editing a Schedule

Editing a Schedule:

Note:

 Changes to a schedule will not impact previously dispatched work orders, only future work orders.

Work order schedules can be edited on the associated Equipment Details screen, under the Schedules tab.

There are several editable subsections for each schedule.

Editing a Schedule's Base Task

1. Under the Schedules tab, locate the schedule card that needs to be updated, then click on the top section of the schedule card.

AHU General Main	Itenance			7~
Frequency: Monthly Assigned To: John Sm				
Task	Estimated Time	Frequency	Next Work Order	
AHU Monthly	0 hr 30 min	Monthly	Sat, Aug 09, 2014	
AHU Semi-Annual	1 hr 30 min	Semiannually	Fri, Jan 09, 2015	
AHU Annual	2 hr 0 min	Annually	Thu, Jul 09, 2015	
No Item(s) - Click her	re to add			
1 Gauge(s) - Click he	ere to view			

- An Edit Schedule window will open. In the first section, users can update the following information:
 - The schedule name
 - The base task that the schedule will use
 - The estimated time to complete the task
 - The priority
 - Who the work order will be assigned to (this is not a required field)

Schedule Name:	AHU	Gene	ral N	taint	tenance		
Base Task:	AHU	Mont	hly		× ~		
stimated Time:	0	hr	30		min		
Priority:	1			~			
Assigned To:	John Smythe 🛛 🗙 🕶						

- 3. In the next section, users can modify the following scheduling information:
 - The date and time that the next work order should be due for completion
 - The frequency (Daily, Weekly, Monthly, Quarterly, Semiannually, Annually, More

Options)

- Users can use More Options to select a custom frequency, such as every 4 years, every 8 days, etc.
- If users select a frequency that is one month or longer, the On drop-down is displayed, allowing users to select the day or week of the month (e.g. 15th day of the month, 2nd Wednesday of the month, etc.)

Assigned To:	John Smythe							×	Y
Туре:	Fixed	Floating	ng						
Next Work Order:	08/09/2014	C	9	12	~	00	*	AM	~
Frequency:	Monthly		•						
On:	9th day of th	e month					~		

- 4. In the last section, users can edit the following optional work order details:
 - A work order title (default is same as the schedule name).
 - · An end date, after which the schedule will stop generating work orders.
 - Seasonal scheduling, where users can specify an interval of months in the year where the work orders should be scheduled (outside of this interval, work orders will not be scheduled during the year). If this schedule is not seasonal, leave these fields blank.
 - Whether or not a notification should be sent if a work order is completed with missing values (checked by default).
 - Dispatch options (either the property's default dispatch options, or a custom number of days in advance).
 - · Dispatch time.

Note:

 If automatic dispatching is not enabled for the property, then dispatch options cannot be selected (all work orders must be manually dispatched). Users will also see additional text in this section indicating that this is because automatic dispatching is turned off. To set automatic dispatch options for a property, see <u>PM Work Order Dispatch Options</u>.

Work Order Title:	Same as sched	tule nar	ne				
End Date:	07/24/2019		× 🖪				
Seasonal:	May	× •	until	August	×	*	
Notify:	Send notific	ation o	n Miss	ing Values			
Dispatch using:	Property Se	ttings (1 Days	5)			
	O Schedule Se	ettings	0	day(s) in a	dvance	at	
Dispatch Time:	10 🛩 00	~ AM	•				

5. Click **Save** once finished.

Adding or Editing Subtasks (Multitask Schedules)

Note:

- · Changes to subtasks will not affect previously dispatched work orders, only future work orders.
- Under the Schedules tab, locate the schedule card that needs to be updated, then click on the Subtask section of the schedule card.

🔾 Add Schedule 🔒 Copy S	Schedule	All Schedules	*	Active	~		
AHU General Main	tenance				^		
Frequency: Monthly Assigned To: John Sn	whe						
Task	Estimated Time	Frequency	Next Work Order		٦.		
AHU Monthly	0 hr 30 min	Monthly	Sat, Aug 09, 2014				
AHU Semi-Annual	1 hr 30 min	Semiannually	Fri, Jan 09, 2015				
AHU Annual	2 hr 0 min	Annually	Thu, Jul 09, 2015				
No Item(s) - Click her	re to add						
1 Gauge(s) - Click here to view							

- 2. In the Associate Tasks window that opens, users can add, edit or remove subtasks.
 - For reference, the base task is listed but must be edited from the schedule (see Editing a Schedule's Base Task, above).
- Users can edit existing subtasks using the drop-down menus. The following details can be modified:
 - Task Name: Users can select a different task to replace the current subtask.
 - Estimated Time: The default time is auto-filled when users add or change the subtask.
 - Frequency: It is important to note that the frequency of the subtask is based on the base task. In the example below, the base task is performed monthly; subtasks will have a minimum monthly frequency, so they can align with the base task's scheduling.
 - Next Work Order: The next date where this subtask will be included on work orders generated by this schedule. The Next Work Order drop-down provides options which are compatible with the subtask's frequency and the dispatch dates for the base task.

		Esti	mate	ed Ti	me	Frequency		Next Work Order	Next Work Order		
		0 hr 30 min				Monthly		Sat, Aug 09, 2014			
×	*	1	hr	30	min	Semiannually	*	Fri, Jan 09, 2015	*	0	
×	~	2	hr	0	min	Annually	~	Thu, Jul 09, 2015	~	0	
	Long Bo	× •	0 hr	0 hr 30 n	0 hr 30 min	× v 1 hr 30 min	0 hr 30 min Monthly ×	0 hr 30 min Monthly × 1 hr 30 min Semiannually	0 hr 30 min Monthly Sat, Aug 09, 2014 × 1 hr 30 min Semiannually V Fri, Jan 09, 2015	0 hr 30 min Monthly Sat, Aug 09, 2014	

Note:

- A maximum of 5 tasks are permitted
- 4. Users can remove a subtask by clicking the associated **Delete** button ().
- 5. To add a subtask:
 - Click Add Task.

Add Task					
Task Name	Estimated Time				
AHU Monthly			0 hr	30 min	
AHU Semi-Annual	×	~	1	hr 30	

• A row is added in the associate tasks window, where users can select a new subtask. The same rules apply as when editing a subtask in (3) above.

C Associate Tasks

Task Name			Esti	mate	ed Ti	me	Frequency		Next Work Order		
AHU Monthly			0 hr	30 n	nin		Monthly		Sat, Aug 09, 2014		
AHU Semi-Annual	×	*	1	hr	30	min	Semiannually	~	Fri, Jan 09, 2015	*	1
AHU Annual	×	*	2	hr	0 mir	min	Annually	~	Thu, Jul 09, 2015	*	1
		*		hr	-	min	Monthly	*	Sat, Aug 09, 2014	*	

6. Click Save once finished.

Adding or Editing Items

Items describe a collection of equipment items that must be attended to in a schedule. Each schedule can have a maximum of 99 Items. Items are useful in situations where identical work is performed on multiple pieces of equipment, such as fire extinguishers or fire alarms. Each item that appears in a work order generated from a Preventive Maintenance (PM) schedule can be marked as Pass or Fail by the person completing the work order.

Items may be created, edited, or deleted from within a PM schedule. For each item, a space is provided to enter a description, location and type.

When creating Items, it is recommended that they be given meaningful names and descriptions in the fields provided. This makes it easier for an Engineer using a handheld device to locate the Item and thus facilitate the process of completing the specified task(s).

1. Under the Schedules tab, locate the schedule card that needs to be updated, then click on the Items section of the schedule card.

ork Orders 🛛 🍪 Gauges	@ Attachments				
Schedule	All Schedules		*	Active	
nythe					
Estimated Time	Next Work Order				
0 hr 15 min	Monthly	Sun, Aug 10, 2014			
re to add			_		
nere to add					
	hythe Estimated Time 0 hr 15 min e to add	All Schedules All Schedules wythe Estimated Time 0 hr 15 min Monthly e to add	All Schedules Al	chedule All Schedules v hythe Estimated Time Frequency Next Work Order 0 hr 15 min Monthly Sun, Aug 10, 2014 e to add	All Schedules All Active All Schedules Active Activ

- 2. In the Edit Scheduled Items window, users can:
 - Add an item by clicking Add Item, then filling in the Description, Location and Type fields.
 - Edit an item by modifying the information in the Description, Location and Type fields.
 - Remove an item by clicking the associated **Delete** button (**(**).

Edit Scheduled Items			5		
O Add Item					
Description	Location	Туре			
Check pressure	Floor 1, Near Elevator	Fire extinguisher	6		

		Save X Cancel
3.	Click Save once finished.	

Adding or Editing Gauges in a Schedule

To add a gauge to a schedule, users must first add at least one gauge to the equipment under the Gauges tab.

1. Under the Schedules tab, locate the schedule card that needs to be updated, then click on the Gauges section of the schedule card.

Schedules (2)	ork Orders Gauges	@ Attachments			
Add Schedule 🔒 Copy S	Schedule	All Schedules	~	Active	~
AHU General Main	itenance				^
Frequency: Monthly Assigned To: John Sm					
Task	Estimated Time	Frequency	Next Work Order		
AHU Monthly 0 hr 30 min		Monthly	Sat, Aug 09, 2014		
AHU Semi-Annual	1 hr 30 min	Semiannually	Fri, Jan 09, 2015		
AHU Annual	2 hr 0 min	Annually	Thu, Jul 09, 2015		
No Item(s) - Click her	re to add				
1 Gauge(s) - Click he	are to view				٦

2. In the Associate Gauges window that opens, a list of gauges that have been defined for the equipment under the Gauges tab are displayed.

Associate Gauges		
Name	Unit	Туре
✓ Airflow	cubic feet per minute (cfm)	Instantaneous
Altiow	cubic reet per minute (cim)	Instantaneo

- 3. Place a checkmark beside the gauges that readings should be taken for on this schedule (removing a checkmark beside a gauge will remove the gauge from the schedule).
- 4. Click Save.