

Generating Maintenance Work Orders

The Preventive Maintenance module creates work orders according to the schedules laid out in the Maintenance capsule.

Users now have two options for generating Work via Maintenance – they can set up Auto-generate Work, or they can manually generate Work using an operation in the Maintenance list. It is possible to allow certain records to Auto-generate Work, while requiring that others are manually generated. With either of these processes, the system calculates whether or not a new Work Order is needed based upon information in the *Dates/Frequency* section of Maintenance records.

Dates and Frequency in Maintenance Records

There are several ways AwareManager JXT can calculate the Next Date of a Maintenance record. By selecting the Source for Generating, users can choose if they would like the Next Date of a Maintenance record to be calculated based on:

- Last Scheduled Date
- Last Maintained Date
- Weeks – once a week, once every other week, etc.
- Day and Week – Every third Friday of the month, every second Monday of the month, etc.
- Readings Exception – If a reading falls below a pre-set lower limit, or is above a pre-set upper limit, a reactive Work Order will be created when you run the Generate Work by Readings Exception operation in the Work Capsule

Commencement Date:	January 1, 2014	<input type="checkbox"/> Inactive
Last Scheduled Date:	July 12, 2015	
Last Maintained Date:	July 6, 2015	
Next Date:	August 9, 2015	
Termination Date:		
	<input type="checkbox"/> Auto-generate Work	
Source For Generating:	Day And Week	
Day Of Week:	Sunday	
Week Of Month:	2	
Stop Month/Day:	None	0
Restart Month/Day:	None	0
Time To Schedule:	10:00	

Above: the system will create the next work order for August 9, 2015 because it is the second Sunday in the month of August

Note: the Auto-generate Work feature is not yet able to automatically generate work when the Source for Generating is Readings Exception

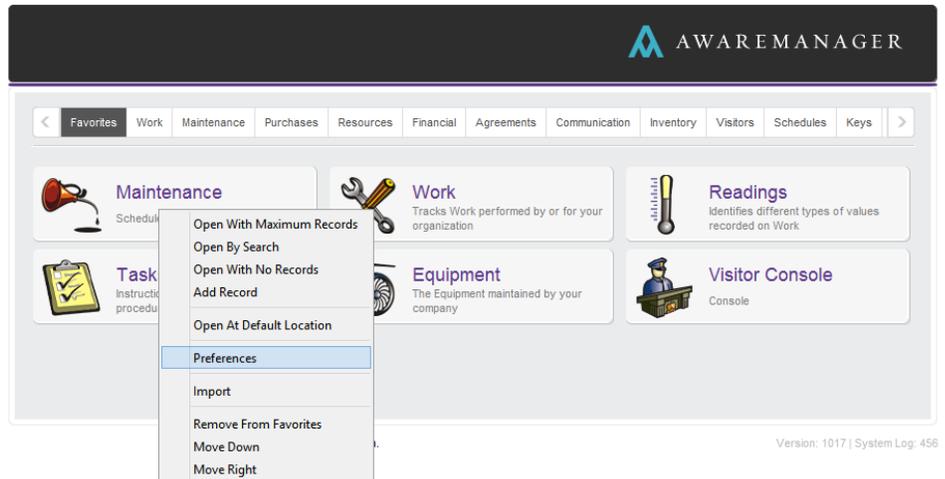
The system adds the frequency to the value that is selected as the Source For Generating. If the resulting Next Date falls within the parameters set in the Generate Work search window or the Lead Time defined in Maintenance Preferences, Work will be generated for that Maintenance record.

If the Last Scheduled and Last Maintained dates are blank, JXT will create the first work order based upon the Commencement Date. Once the Work Orders are generated, they appear in the Work capsule along with all of your other Work Orders.

Auto-generate Work

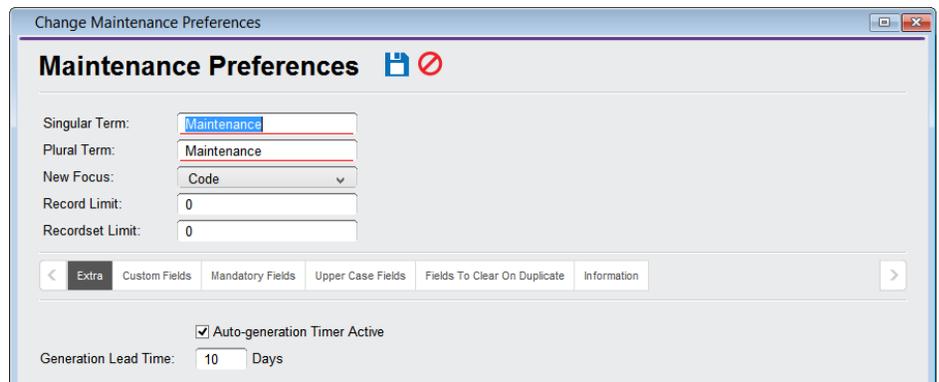
Auto-generate Work allows you to set up Maintenance schedules and leave them to generate new Work automatically, as opposed to having to generate them manually. To set this up, first go to **Maintenance Preferences**.

- Go to Maintenance Preferences: right-click the Maintenance capsule and select Preferences from the drop-down list

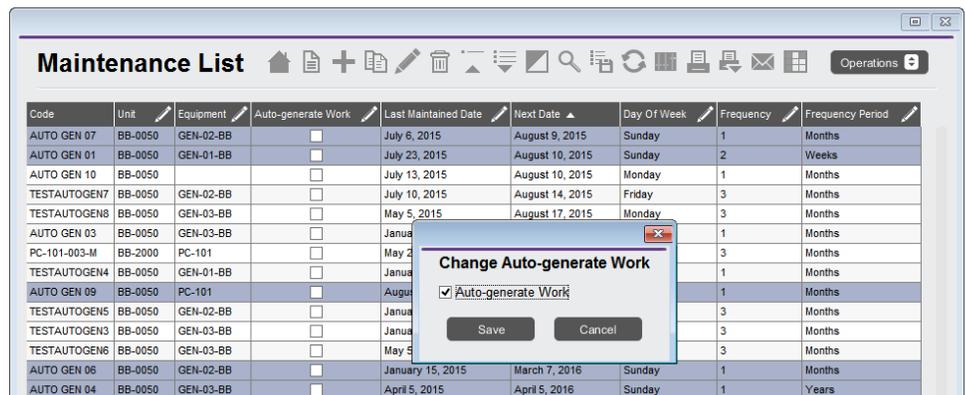


- Edit Preferences
 - Activate the **Auto-generation Timer**, which generates the new Work Orders every day at midnight.
 - Set the **Lead Time**. Lead Time defines how far ahead the system will search for Maintenance with an upcoming Next Date (i.e. if the lead time is set to 10 Days, Work will be generated for any Maintenance record with a Next Date in the coming 10 days).

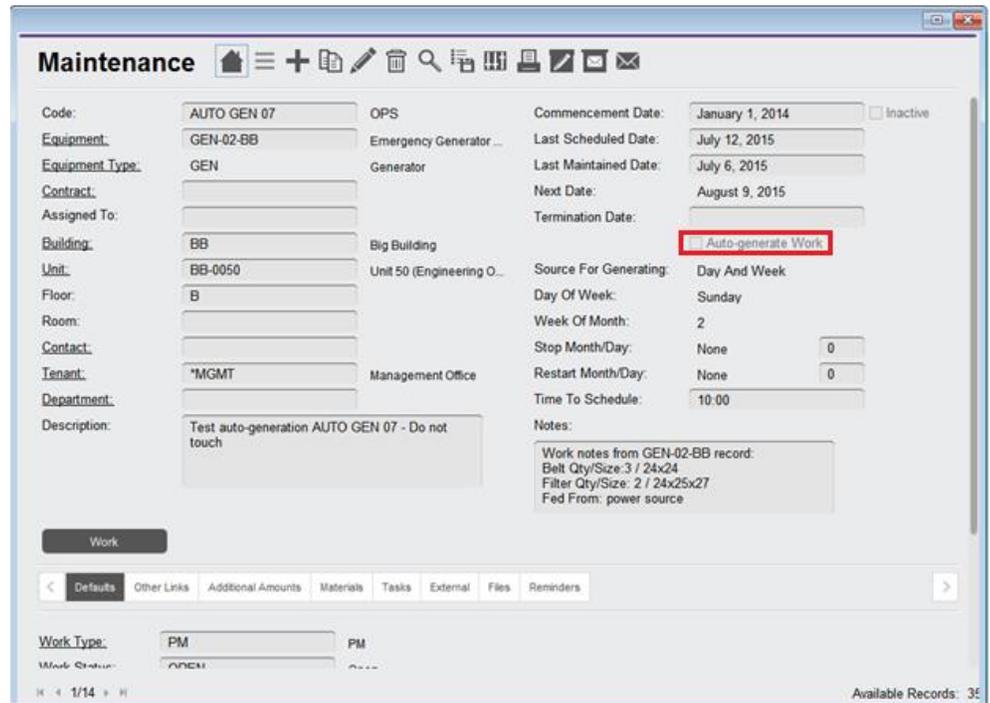
- Save changes



- Select the Maintenance records you would like to automatically generate work. There are two ways this can be done, you must access the Maintenance List for both options:
 - Several records
 - Add the Auto-generate Work column
 - Highlight records you would like to use to Auto-generate Work
 - Use the pencil in the Auto-generate Work column to update the records and Save

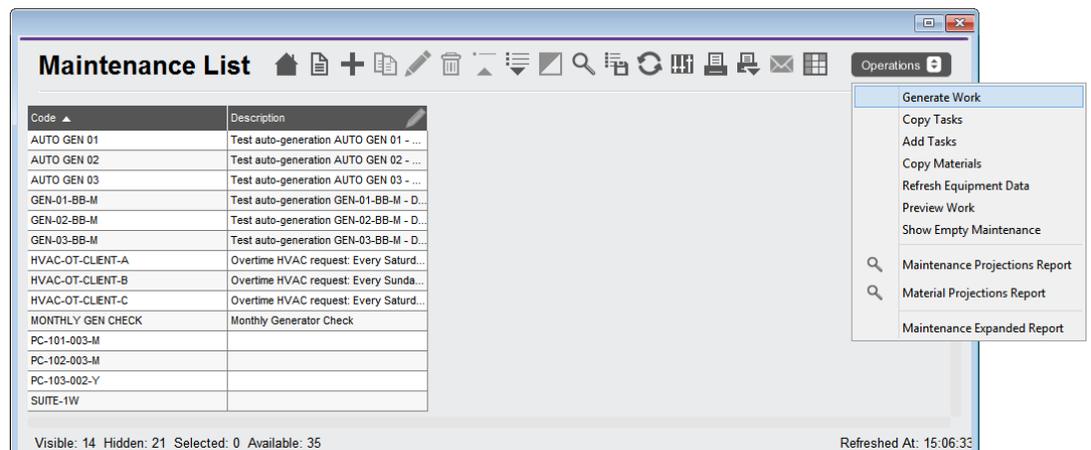


- Individual record
 - Open an individual Maintenance Record in change mode
 - Select the Auto-generate Work checkbox



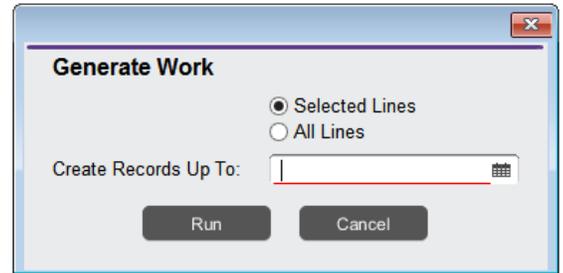
Generate Work Operation

The Generate Work feature is found on the Operations menu of the Maintenance capsule. The first step is to open up the **Maintenance List**.



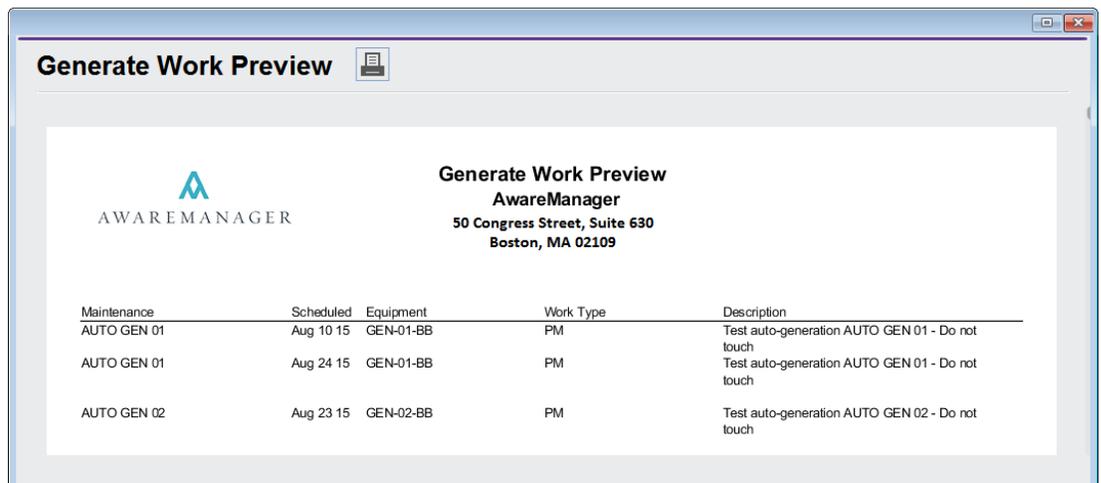
- Access the Maintenance List by searching, using a Recordset, or opening the Maintenance capsule with maximum records (if you do not recognize any of these options, refer to documentation related to Search, Basics, and Search-based Recordsets)
- Once you are in the Maintenance List, either select specific records by highlighting them in the list or do not select any records. You will have the option to include all records in the list in the Generate Work search window
- Go to **Operations**→**Generate Work**

- Enter the **Create Records Up To** date – the date through which you would like to generate Maintenance Work (i.e. if you generate weekly, put in the last date of that week, etc.)

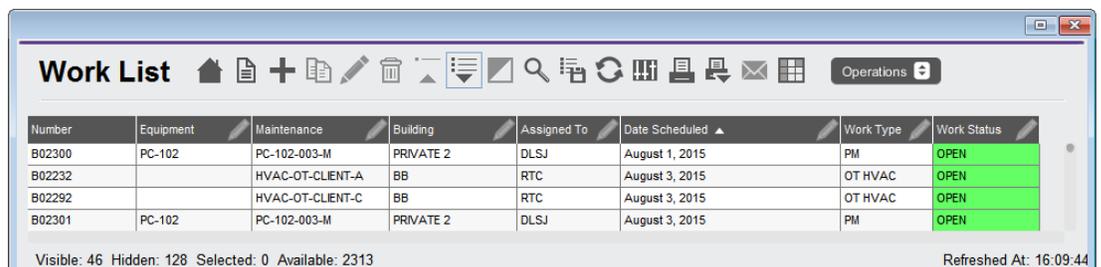


This operation will go through all Maintenance records included in the selected group. For each record, it will calculate the Next Date. If the resulting Next Date falls between the current date and the **Create Records Up To** date, from the Generate Work search window, Work will be generated for that Maintenance record.

- The system will show you a preview report of the work to be generated, unless there are errors preventing the generation (in which case see the Errors during Generation section below)
 - Review the preview report closely to check that the Date Scheduled is accurate and that it is the correct total number of work orders to be generated (in the lower left-hand corner of the report)



- When you print/save or close this preview you will be prompted to either generate the work or cancel the operation. Click **Yes** to generate the Work records
- The Work List window will open to show the newly generated records



Errors during Generation

If any errors occur during the generation process, Work for the Maintenance record with the error will not be generated, and you will be shown a report listing the specific record(s) affected as well as a description of the actual error.



When you print/save or close out this report, you will be asked if you would like to continue:

- Select **Yes** to generate Work from the Maintenance records without any errors
- Fix the affected records
- Repeat the **Generate Work** process for the records that were not generated