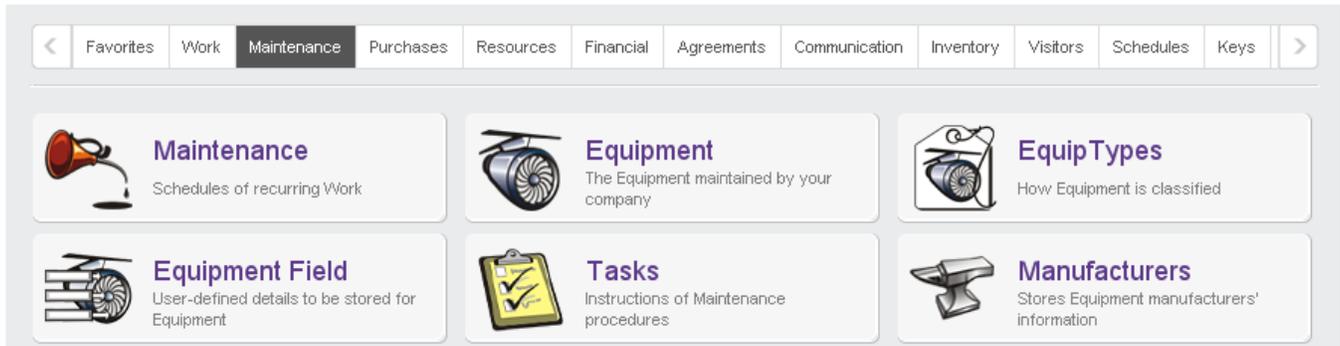


Maintenance Capsules

Here we will briefly describe each of the Maintenance capsules. Later in this session we will detail the unique features of each Maintenance capsule.



Maintenance

This capsule stores information that is used to create Maintenance work orders. The Maintenance capsule pulls together all of the attributes related to a single Maintenance work record; it links to the *Equipment*, *Task*, and *Material* capsules. A separate work record is generated containing all of the linked information based on the frequency indicated on the Maintenance record.

Equipment Types

This capsule contains one record for each type of equipment. Equipment Types are broad categories used to group individual equipment. The following are some examples of equipment types:

Code	Description (of the equipment type)
AHU	Air Handling Unit
BLR	Boiler
F-R	Return Fan
F-S	Supply Fan

Equipment

This capsule contains one record for each piece of equipment. Each record stores the attributes of a single piece of equipment, including its location, manufacturer, etc.

Equipment Field

This capsule is used to define additional fields that you want to store for one or more pieces of equipment. These records will be linked to the records in the Equipment capsule. They can be set up to default based upon the Equipment Type.

Tasks

This capsule stores descriptions of maintenance procedures (i.e. instructions) which can be as general or detailed as desired. Some of our clients create very general tasks; others will create very detailed instructions.

Manufacturers

This capsule stores information about the manufacturer of a piece of equipment. This is a basic capsule that makes it easy to associate an equipment record to the manufacturer without having to type the same manufacturer's name multiple times.

Other Capsules used with the Maintenance module

Readings

The *Work* module includes a feature called **Readings**. This feature tracks values that can be linked to a *Task*. Reading can be recorded for a single piece of equipment or a list of *Equipment* or *Units*.

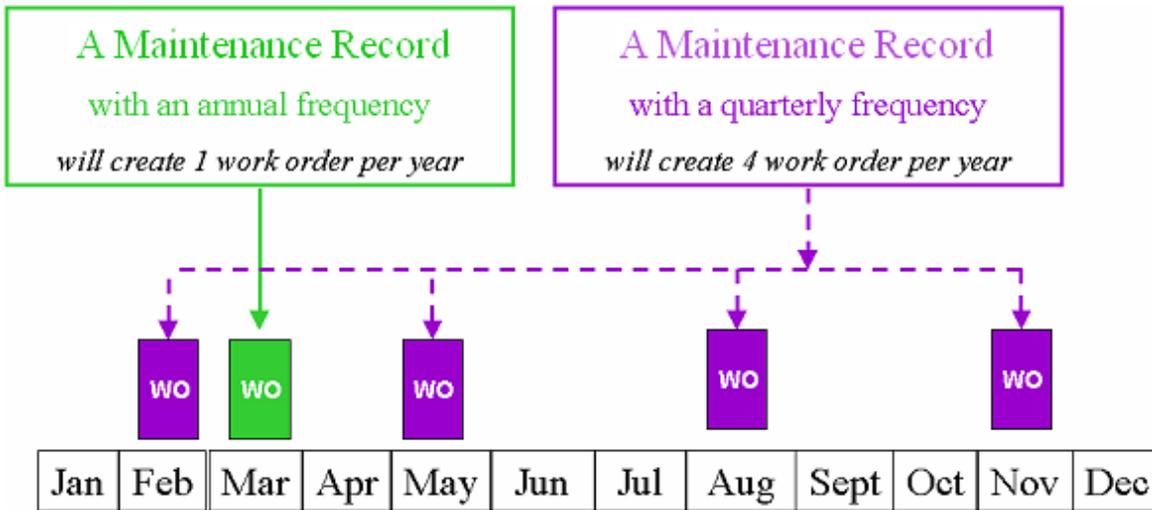
Contracts

The *Agreements* module includes a capsule called **Contracts** which stores information regarding the basic terms of a service contract. *Reminders* can be associated with these records to notify users of expiration dates. *Contracts* can be linked to *Maintenance* records to facilitate tracking maintenance performed by vendors.

Critical Concepts

The following concepts are extremely important to understand when using the Maintenance module.

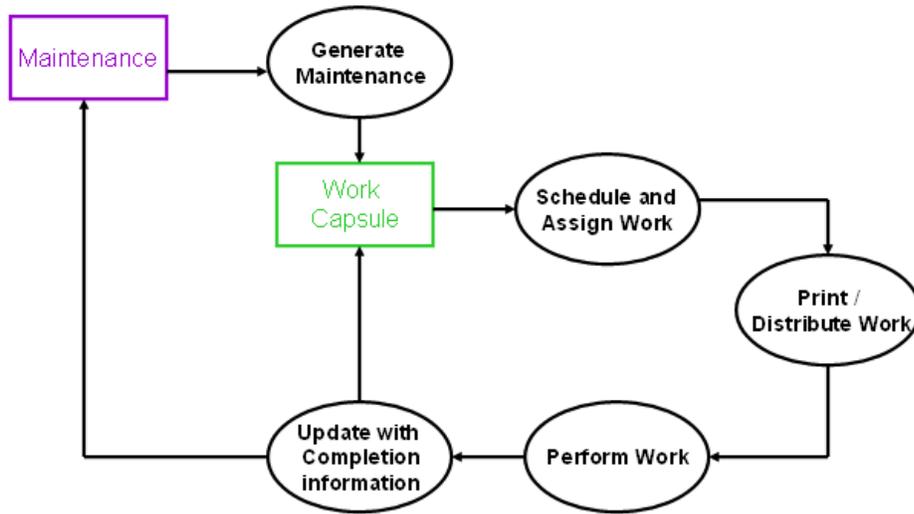
CC #1: The Maintenance capsule is a mechanism for creating work records according to a Maintenance record.



CC #2: Once generated, a Maintenance work record is stored in the same capsule as all other work records.

- When the **Generate Work** operation is run, Maintenance work records are created in the **Work** capsule based on the information in the Maintenance capsule.
- These Maintenance work records can be assigned, printed, and distributed just like corrective work.
- Once the work is performed, the completion information is recorded on the work record. When the work is closed, the **Completion Date** automatically updates the Maintenance record's *Last Maintained Date* field.

A typical PM process:



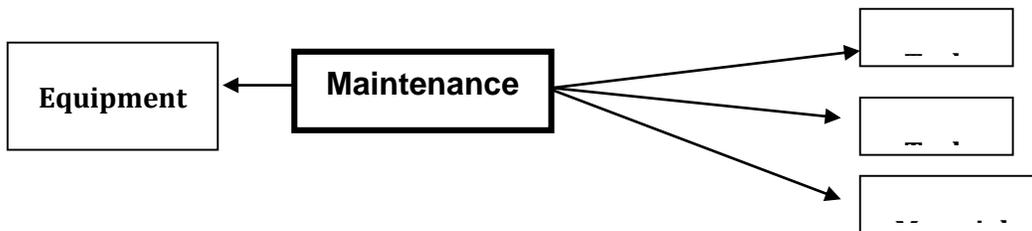
CC # 3: Capsule Relationships

An important aspect of the Maintenance module is the relationship between the Maintenance, Equipment, Tasks and Materials capsules.

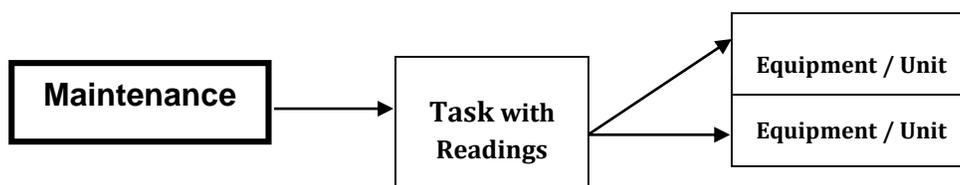
- A Maintenance record can stand alone (i.e. not be associated with a piece of equipment) to track any kind of recurring event or job.



- A Maintenance record can be linked to a single Equipment record, but multiple tasks and materials.



- A Task (using the Readings feature) can be linked to several pieces of equipment or several units – which is then linked to a single Maintenance record.



CC # 4: Determining the Maintenance records you need and their frequencies

When creating a Maintenance record, a critical attribute of the record is the *Frequency* and *Commencement Date*. Because of the AwareManager's unique capsule relationship between Maintenance and Tasks, the number of Maintenance records needed and their related frequencies are different than you may first assume.

To determine the Maintenance records needed and their frequencies we recommend plotting the maintenance for the year.

1. Think about the tasks that need to be performed, and their frequencies.

Let's say you have a piece of equipment with the following maintenance:

Once a year - CLEAN UNIT

Twice a year - GREASE BEARINGS

Four times a year - CHANGE FILTER

2. Determine the months you plan to perform each task. Keep in mind that it may make sense to coincide the tasks to minimize the number of trips to the equipment in the course of a year.

Clean Unit – July

Grease Bearings – January & July

Change Filters – January, April, July & October

3. Next, plot the tasks for the year. You can determine the number of schedules by looking for the unique combination of tasks.

January – Grease Bearings, Change Filters

April, October – Change Filters

July – Clean Unit, Grease Bearings, Change Filters

4. Finally, based upon the Maintenance records needed, determine the frequency for each by denoting the number of times in the course of a year that the maintenance occurs.

Once a year (January) - Grease Bearings, Change Filters

Once a year (July) - Clean Unit, Grease Bearings, Change Filters

Twice a year (April, October) - Change Filters

CC # 5: Values can be copied across records using the AwareManager's List Operations to facilitate setting up and updating them

You can avoid setting up each record individually by grouping similar records and copying the values across them. Records can be grouped in any of the following cases:

- You have multiple pieces of equipment with the same Equipment Fields.
- You have multiple pieces of equipment with the exact same Maintenance.
- You have various maintenance records that involve the same Tasks (regardless of any other information that might differ between the records).
- You have various maintenance records that require the same Materials to be used.

These records are not explicitly grouped; rather, they are brought up in the same list and one record is highlighted. The highlighted record is updated to include all the details to be copied to the other records in the list. The appropriate option is selected from the **Operations** menu and the corresponding values from the highlighted record are copied across to all other records in the list.

These options are available in the Equipment and Maintenance capsules. For more details, please see the Maintenance documentation.