

## Recurring Work Orders - Overview

### Purpose

The purpose of this document is to outline all the elements that could effect work orders from regenerating themselves.

### Generating Tasks

Whenever the program executes one of the generate tasks routines it looks for tasks that meet the following criteria.

- A scheduled starting date that falls within the generating range, and/or falls behind today's date.
- The 'Do Not Generate New Task' flag has not been set.
- A recurring frequency has been setup.
- The task has been assigned as a Planned Maintenance, Mini-PM or Change Over type task.
- If turned on, the Equipment assigned to the task must also be marked as 'In-Service' within the Equipment module (this feature can be turned off from within the Work Orders Setup screen).
- If the 'Generate New When Done' option has been set, the task must also have a status of 'Completed' before a new task is created.

If all the above criteria have been satisfied the program will regenerate a new task for all tasks it finds. This includes both open tasks, and those that have already been closed.

When the Maintenance Scheduler module first loads, by default, it will look 30 days into the future, and generate all tasks that fall within this range. You can specify a new value under the Work Orders setup.

#### Do Not Generate New Task

To toggle the 'Do Not Generate New Task' flag so the program will create a new task:

- Select and make current the work order you want to work with in *Maintenance Scheduler* module

- Open the *File* menu and select the *Change* ‘Do Not Generate New Task’ option.

The next time a generate tasks routine is executed, the program will attempt to regenerate this task.

## Work Orders Setting that Effect Recurring Tasks

The Scheduler module allows you to setup various options that effect recurring tasks.

To access the Work Orders Setup screen:

- Move to the *Maintenance Scheduler* screen.
- Open the *File* menu and select the *Work Orders Setup* option.

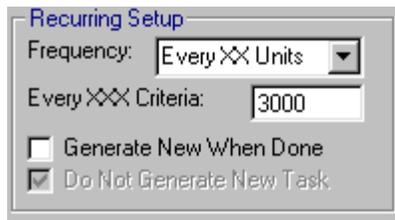
### Options on the General Tab

This tab allows you to specify the following options:

- *Days in Advance to Generate Work Orders* – To help keep the database at a reasonable size, we allow you to specify how many days in advance to generate or display work orders.
- *Generate New PMs for In-service Equipment Only* – Selecting this option prevents the automatic creation of new work orders when the assigned equipment record has not been placed in service. Please refer to the Equipment and Machinery chapter for more information.

## Scheduling by Meter

With the scheduler module you can have new recurring tasks scheduled by meter, hours or odometer readings. This comes in handy for a variety of reasons such as scheduling equipment maintenance after so many hours or miles have past.



To schedule by meter:

- Move to the *Details* tab.
- Move to the *Recurring Setup* section.
- Select the recurring frequency of *Every XX units*.
- Move to the *Every XXX Criteria* text box and enter how often you would like this task to repeat. For example, you have an automobile that you want to change the oil every 3,000 miles. You would enter 3000 here (no commas).
- Now you need to setup when to perform the first task. Open the *File* menu and select the *Set Next Meter* option.
- Enter the appropriate value in the space provided and press enter. When the equipment meter value equals or exceeds this value, the work order will become due.

The *Generate New When Done* flag is always used when scheduling By Meter (the checkmark in the scheduler is ignored); this is to say that the following criteria must be satisfied for a “Meter Type Task” to generate a new work order.

- A piece of Equipment is assigned to a task.
- The Equipment current meter is greater than zero.
- The Recurring frequency for the current task must be setup to “Every XX Units”.
- A Value must be set for the “Every XXX Criteria”.
- The “Next Meter” has been set for the current work order or task.
- The previous task must be set as “Completed”.
- The “Do Not Generate New Task” flag has NOT been set.

When a new work order is created the new task will have a scheduled start date 2 years in advance of the date it was created. This is to prevent the task from showing up in the default sorts, and from being reported as being past due. When the Equipment meter value reaches or exceeds the Next Meter value the schedule start date will be changed to the date this information was first realized.

When the new work order is created:

- The previous task will have its “Do Not Generate New Task” flag set to true to prevent the task from regenerating itself multiple times.
- The program will add the current equipment meter reading to the value as setup in the “Every XXX Criteria” section, and use the result as the value to meet before the next work order becomes due.
- The program will copy the other information from the old task to the new one.
- The new task will have a scheduled start date 2 years in advance from the date the new task was created.

## Entering Equipment Meters

Equipment meter or odometer readings are recorded in the Machinery and Equipment module and can also be recorded from the *Equipment* lookup screen.

## PM Groups

PM Groups can also have an effect on the Recurring types of PMs. For instance is the PM Group flag has been set, but the task does not actually belong to any group, this could prevent it from regenerating. Also if the PM Group the task belongs to have the wrong criteria setup, again this could cause a task to regenerate.

For more information on PM Groups read the Maintenance Scheduler chapter or search the Scheduler’s help file.

## Other Things that may affect Recurring Tasks

There maybe other things that may prevent a recurring task from regenerating. One possible thing could be non-complainant information in a data field, which could cause the program to skip over a task when trying to copy it to a new work order. We have installed code to help catch these types of problems, but we have missed something that we were not expecting.

Many times all it takes to get a task that does not regenerate to start generating is to delete it, and then recreate it.

## **View Tasks That Have Not Regenerated Themselves**

To view all work orders that have not regenerated yet:

- Move to the Maintenance Scheduler module.
- Open the *Sort* menu and select the *Sort By Not Generated Anew* option.