Kinetic Maintenance Management User Guide

Version 2025.1

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Maintenance Management

You use the Maintenance Management module to enter maintenance requests, track maintenance jobs, and plan preventative maintenance tasks performed on equipment in a manufacturing or distribution facility. This includes internal capital equipment, tools, gauges, and fixtures such as air conditioning units, forklifts, and shop floor tools. You perform preventative maintenance according to predefined schedules, based on elapsed use time or on equipment meter readings. You can also use functions within the module to manage manual requests for maintenance on specific pieces of capital equipment.

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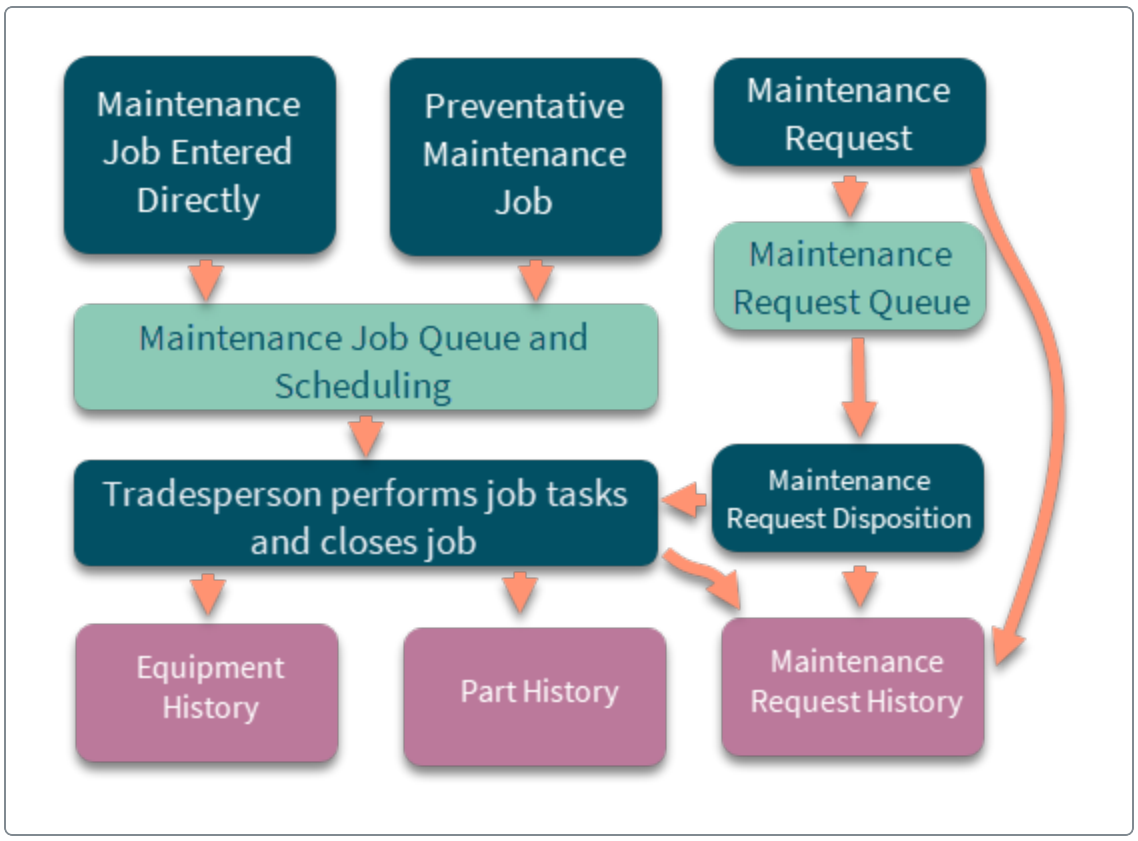
Maintenance jobs can originate from three sources:

- **Entered directly by a tradesperson/manager** - At times, unplanned maintenance is necessary for tools or equipment and can be entered directly for service. For example, a tradesperson is aware that maintenance is suddenly needed for a torque wrench due to malfunction, he or she directly creates a maintenance job through Maintenance Job Entry.
- **Planned Preventative Maintenanc**e - Preventative maintenance jobs can be planned in advance and scheduled based on a calendar schedule or usage (meter reading).
- **Maintenance Job Orders (MJO)** - Any user with access to Maintenance Request Entry can enter a request for maintenance against a specific tool or piece of equipment. Access to this program is provided through the application's Main Menu, Data Collection, external Manufacturing Execution Systems (MES), the Web application, and the handheld applications.

The following is a maintenance management process flow.



The Maintenance Management module is not intended for managing maintenance services performed on equipment sold to customers. You must use the Field Service module to manage services performed on customer-owned items.

Setup

This section describes the primary records you need to create for the Maintenance Management module. These are in the Setup folder for this module. Only the primary records are described here. Some areas within the next Operations section may also document setup records if they are required for a specific workflow.

You may also need to set up some parameters in Company Configuration. Some modules have global settings you define through this administration application. For more information, review application help.

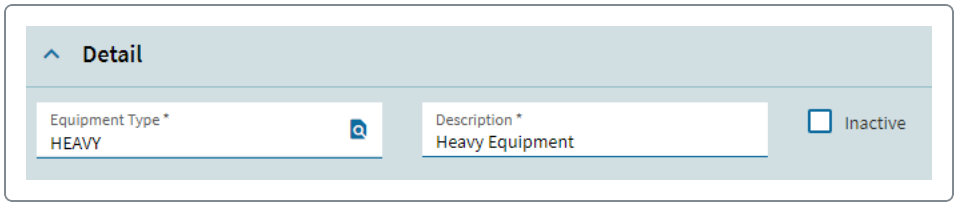
Creating Equipment Types

Define and group multiple pieces of equipment by nature, or type, using the categories you create in **Equipment Type Maintenance**. Categorize your equipment however you need, but note that each piece of equipment you enter can only have one equipment type. Examples of equipment types include Transportation Device, Motor, Pump, and so on.

You can then assign the types you created to pieces of equipment in **Equipment Maintenance**. You can use them in various Maintenance Management search apps and reports to limit the results.

Adding a New Equipment Type

1. From the main menu, go to **Service Management > Maintenance Management > Setup > Equipment Type**.
2. Select **New** to add a new equipment type.
3. In the **Type** field, enter an identifier code for the equipment type, such as **HEAVY**.
4. In the **Description** field, enter a more descriptive explanation of the type. For example, **Heavy Equipment**.
5. The new equipment type is active by default. To inactivate the equipment type and prevent Kinetic from assigning it to parts or transactions, select the **Inactive** check box.



6. Select **Save**.

Associating an Equipment Type with a GL Control

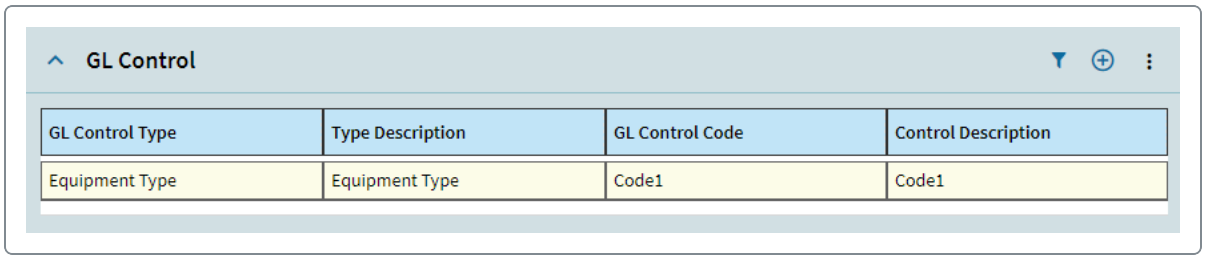
In **Equipment Type Maintenance**, you can associate one or more GL controls with an equipment type record. The selected GL Controls determine the accounts and journal codes used to post transactions to which the record applies.

Each control associated with a record must belong to a different control type. The association allows the use of control values when the record applies to a posted transaction.

Example

The **AR Account** and **AP Account** GL control types reference the company entity. You define GL controls based on both types and apply them to **Company A** in **Company Configuration**. A transaction that belongs to **Company A** then posts using the account hierarchy set up for this specific transaction for the **Company A** business entity. Posting rules use the controls' account references to create the accounts for the company's journals.

1. On the **GL Control** card, select **New** to associate a new GL Control with the equipment type record.
2. Enter the **GL Control Type** and **GL Control Code**.



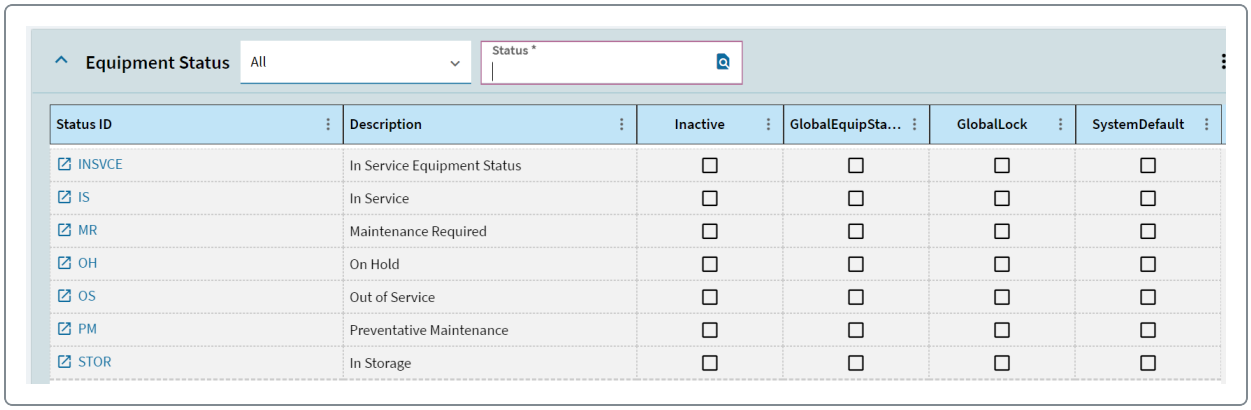
3. Select **Save**.

Creating Equipment Statuses

Use **Equipment Status Maintenance** to define custom codes that denote the status of a piece of equipment; for example, In Service, Requires Maintenance, and Out of Service. Each piece of equipment you define can only have one equipment status code attached to it.

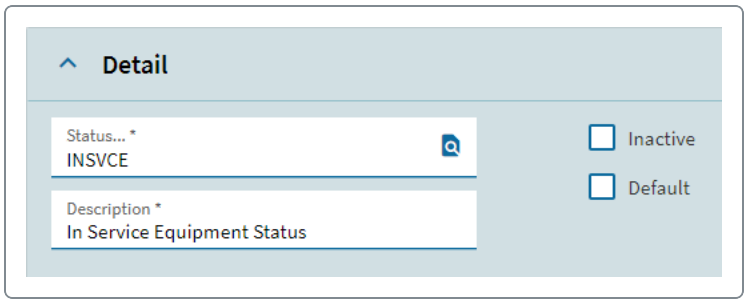
To specify equipment status codes:

1. From the main menu, go to **Service Management** > **Maintenance Management** > **General Operations** > **Equipment Status**.



2. Select **New** .

3. On the **Detail** card, enter the status ID and the description.



4. Use the **Default** check box to specify if this is the default status code used on all new pieces of equipment entered in Equipment Maintenance. You can override the default code for specific pieces of equipment to accommodate the needs of your operations.

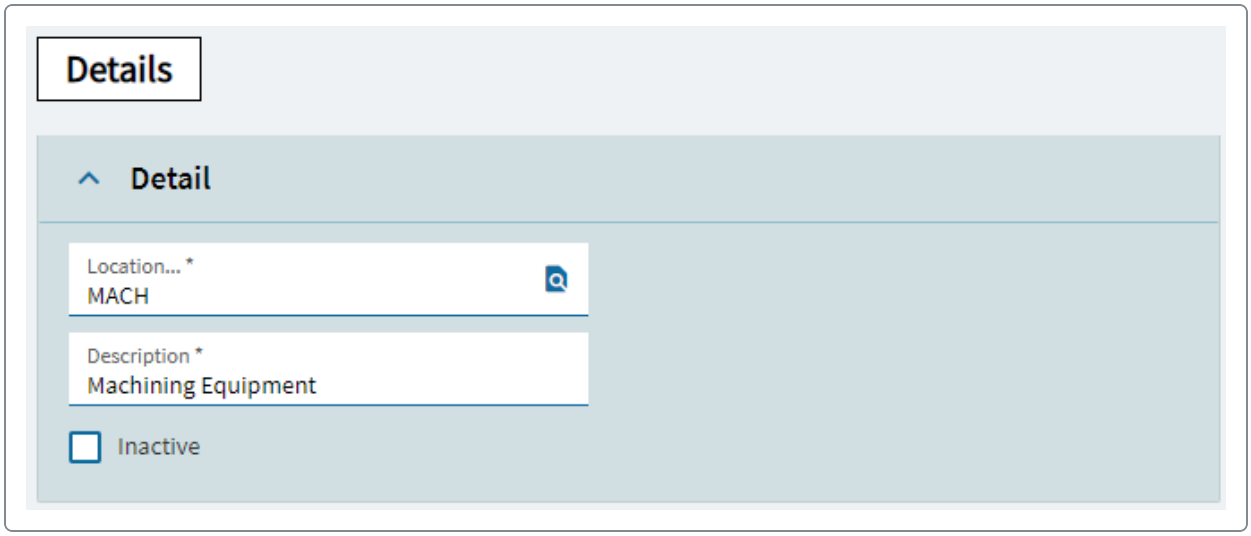
5. Select **Save**.

If you want to deactivate the status, select the **Inactive** check box.

Equipment Locations

You define the physical location of each piece of equipment in Equipment Location Maintenance. The physical location of equipment can be defined at a high level (Building A) or at a detailed level (Building A Pole 45). Each piece of equipment you define in Equipment Maintenance can only have one attached equipment location code.

1. From the main menu, go to **Service Management** > **Maintenance Management** > **Setup** > **Equipment Location**.
2. Select the **New**icon to create a new equipment location.
3. Enter the location code ID and the description.



4. Select **Save**.

Creating Resource Groups

You assign resource groups and resources to operations used on jobs (method of manufacture) for scheduling purposes. Each resource group must hold at least one resource and is inactive until you create a resource for it.

In production, you manufacture an item through a combined effort of equipment, tools, and people. You can define each of these items within your manufacturing process using the **Resource Group** app.

As previously mentioned, a resource group must hold at least one resource. A resource is a specific manufacturing asset. It can be a piece of equipment like a punch press or a laser wire marking machine, a tool required to produce components. It can also be an employee like a setter, or operator.

Resource groups can also define equipment and skills that are placed together within a physical location.

You cannot view or maintain resource groups or resources that were created in a site other than where you are logged in.

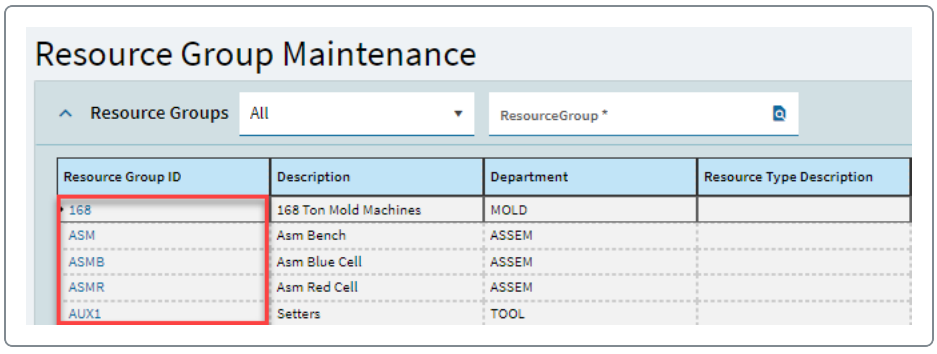
Add a Resource Group

First, create a new resource group.

To create a resource group:

1. Open the **Resource Group** app.

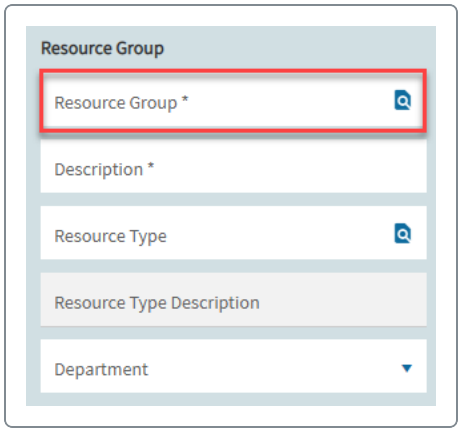
   The Landing page displays. The page lists all the existing 'Resource Groups' records. To select an existing record, select the 'Resource Group ID' link inside the grid.



2. To add a new resource group, select **New**.

   The Details card displays.

3. Enter an identifier for the new group using the **Resource Group** field.



4. Enter a description for the resource group you are entering.
5. In the **Resource Type** field, search for and select a resource type.

   This depends on what type of a resource group you want to create. The options include:

   - Cell (C)
   - Machine (M)
   - People (P)

6. In the **Department** field, select the to which this resource group is assigned.

   Assigning a department to a resource group provides a way to collect multiple resource groups for various reporting and selection purposes.

   The department you select on the resource will also override any departments originally selected to record applied 'labor' and 'burden'.

   To learn hot to create a department, review the Creating Job Departments article.

7. If this resource group is a physical place within the manufacturing center, select the **Location** check box.

Selecting this check box causes the resource group to be defined as the destination on the shop floor where both raw materials and partially completed product quantities are delivered. It also indicates where completed product quantities are picked up from this resource group to be sent to the next operation, shipped to the customer, or received to inventory. Location resource groups also define the primary amount of manufacturing burden (overhead) placed against a labor transaction.

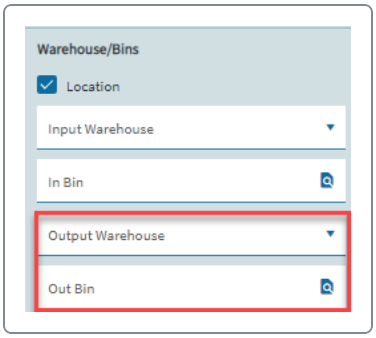
Because of this functionality, a resource group defined as a location controls the amount of actual burden placed against an operation. The burden rate defined on a location resource group overrides any burden rates used on the primary resource group selected for the job operation. When a shop employee enters labor against a location resource group, the burden rate from this resource group is used on the labor transaction, instead of the burden rate from the planned resource group on the job operation. You use this feature to allocate burden costs for tooling, product fixtures, and so on in order to include them in actual burden amounts.

8. In the Warehouse/Bins group box, in the Input Warehouse and Input Bin fields, select a **warehouse** and **bin** records.

This is the warehouse from which the resource group pulls its material. Both warehouses contained within the current site and shared warehouses are displayed on this list.

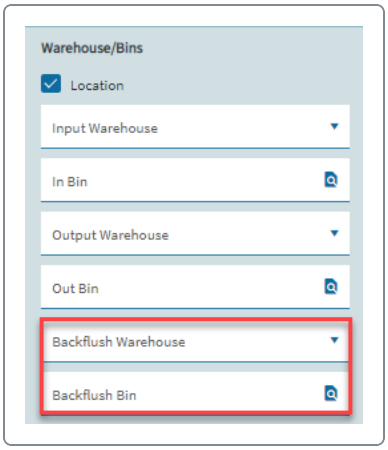
- If you use the 'Advanced Material' module, you should assign input warehouses as soon as possible. If a resource group for a job operation does not have an input warehouse, inspection apps 'DMR Processing' and 'Inspection Processing' could misinterpret the absence of an input warehouse as a reason to assign a blank destination warehouse. If the input warehouse is the same as the output warehouse, a corresponding move queue is not created in the 'Material Queue' app.
- When the input warehouse and bin are the same as the output warehouse and bin, and if the 'Auto Move' check box is selected, then no automatic move request is generated, and the 'Request Move' check box is not selected in the 'Report Quantity' app or 'End Activity' (Data Collection). This arrangement works well for a production line, cell, or other resource group that is in close proximity to other resource groups that also need this material.

9. Select **Output Warehouse** and **Out Bin**.



This specifies the warehouse where material is to go once the work from this resource group needs to be moved. Both warehouses contained within the current site and shared warehouses are available for selection.

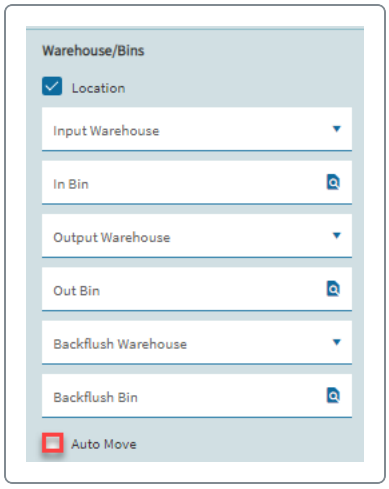
10. If required, select **Backflush Warehouse** and **Bin**.



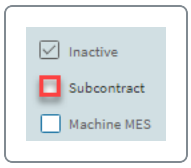
This specifies the warehouse that used for warehouse/bin picking. If the resource group's 'Input Warehouse/Bin' values do not have a positive on-hand quantity at the location, operations are backflushed from this location.

Backflushing is the automatic issuing of material. This can occur as the material is needed for specific labor operations on the site floor, or as part of the job closing process.

11. If required, select the **Auto Move** check box to indicate that you do not want to create a material queue request when completing work in this resource group.

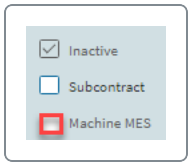


12. If required, select the **Subcontract** check box to indicate that this resource group is used for subcontract (outside processing) operations.



You would select this check box if the resource group you are creating is actually one of your suppliers or is located at a supplier's site.

13. If required, select the **Machine MES** check box if the machine resources in this group should be synchronized with an external Data Collection (DC). You can assign resources in this group to operation records which are integrated with a machine DC.



When you select this check box, a confirmation message notifies you that the machine type for all resources in the group will be changed to M (Machine). Select **Yes** to continue or **No** to cancel.

This check box activates only if your resource group holds the **M (Machine)** resource type.

14. Select **Save**. 

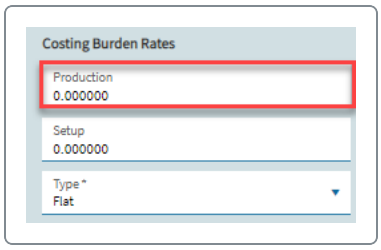
15. Remain in the **Resource Group** app.

Define Costing Parameters

You define costing at the resource group an resource levels.

To define costing parameters:

1. You are on the **Details** card.
2. In the **Costing Burden Rates** group box, enter a burden rate value in the **Production** field.

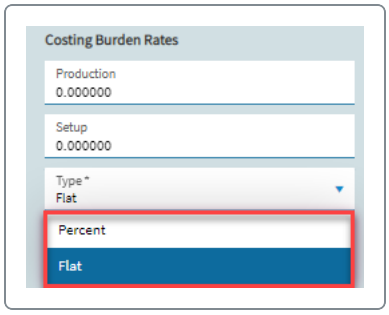


   These rates control the burden, or overhead cost, associated with running a resource group.

3. In the **Setup** field, enter a burden rate value.

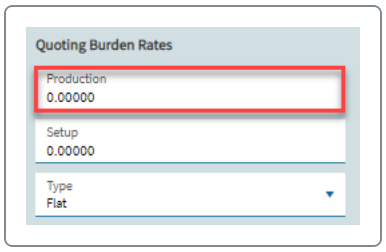
   The setup rate is multiplied by the setup hours or cost.

4. Select **Flat** or **Percent** in the Type field.



   The production rate is multiplied by the burden (machine) hours or labor cost at the time of labor entry, depending on whether you have selected **Flat** or **Percent**.

5. In the **Quoting Burden Rates** group box, enter a burden rate value in the **Production** field.



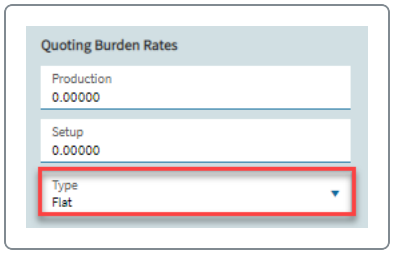
These rates are used as the burden costing rate when you enter quotes using the 'Quote Entry' app. If you don't enter any quoting rates, the production/setup burden rates display as the defaults in the 'Quote Entry' app.

The rate is multiplied by the estimated production hours in the 'Quote Entry' app.

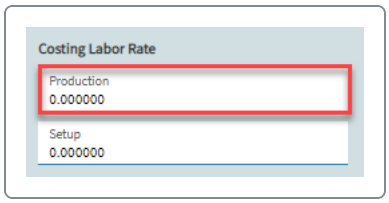
6. In the **Setup** field, enter a burden rate value.

   The setup rate is multiplied by the estimated setup hours.

7. Select **Flat** or **Percent** in the Type field.



8. In the **Costing Labor Rate** group box, in the **Production** field, enter a production labor rate value.



   The rate controls how Kinetic costs labor when you enter time using the 'Time Entry' app or 'Data Collection.'

9. In the **Setup** field, enter a setup labor rate value.

   The rate controls how 'Kinetic' costs labor setup when you enter time using the 'Time Entry' app or 'Data Collection'.

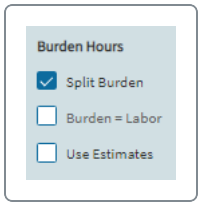
10. In the **Quoting Labor Rates** group box, in the **Production** field, enter a production labor rate value.

The rate is used as the labor costing rate when you enter quotes using the 'Quote Entry' app. If you don't enter any quoting rates, the production/setup costing rates display as the defaults in the 'Quote Entry' app.

11. In the **Setup** field, enter a setup labor rate value.

    The rate is used as the labor costing rate for a setup when you enter quotes using the 'Quote Entry' app. If you don't enter any quoting rates, the production/setup costing rates display as the defaults in the 'Quote Entry' app.

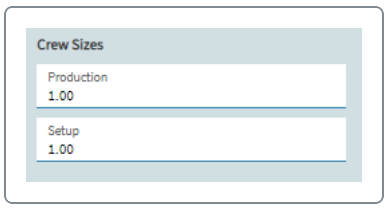
12. Define the burden hours using the **Burden Hours** group box.



    The options include:

    - **Split Burden** - Controls the distribution of labor and burden hours during 'Data Collection'. Use this option only if you use Data Collection. If multiple employees work on the same job operation at the same time, and you normally want to split the burden (machine) hours among those labor entries to more accurately reflect the actual machine usage, select this check box.
    - **Burden = Labor** - Indicates that you want the number of burden hours to be the same as the number of labor hours entered. Like 'Split Burden', this option applies only if you use 'Data Collection'.
    - **Use Estimates** - Select this check box to apportion the actual labor time reported against operations by using the estimated time on each operation. When an employee clocks into multiple operations on the same resource group at the same time, this functionality uses the estimated hours on each operation to calculate how much actual labor time to place against each operation. If an employee is clocked into multiple operations within different resource groups - and one resource group has its 'Use Estimates' check box selected, then 'Kinetic' includes the operation estimates when applying labor against each operation.

13. In the **Crew Sizes** fields, enter how many shop employees work within this group.



    You can have different crew sizes for 'setup' and 'production'.

14. Select **Save**.

15. Remain in the Resource Group app.

Define Scheduling Parameters

Each resource group needs to hold certain scheduling parameters. You assign resource groups to operations and operations are part of jobs in production. When you schedule a job, the scheduling engine looks at the resource group and resource levels and considers the scheduling parameters when scheduling the job.

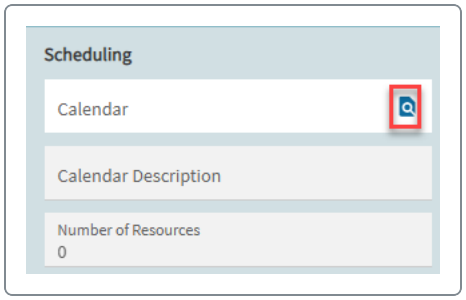
To define scheduling parameters:

1. You are on the **Details** card.

   If the Details card doesn't display, in the Nav Tree, select the **Details** node.

   This is the very top node.

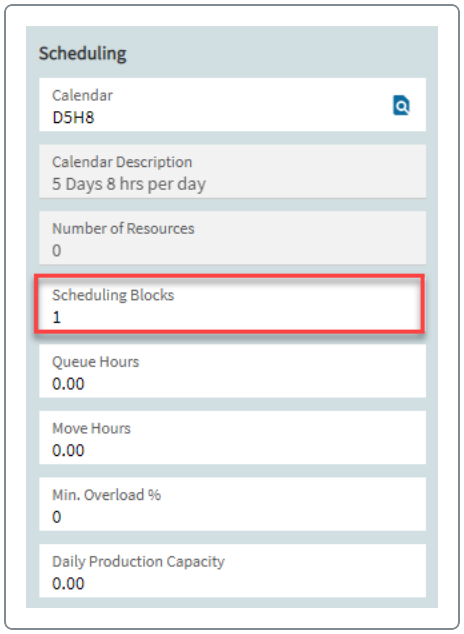
2. In the **Calendar** field, search for and select the production calendar associated with the resource group.



   The selected calendar is the default calendar used for resources created within this resource group.

   To learn about how to create a production calendar, review the Adding a Production Calendar article.

3. In the **Scheduling Blocks** field, enter how many resources one operation needs in order to be complete.



The scheduling engine divides the production time by the number of scheduling blocks you enter. It then finds resources that have capacity available in the required time frame. If enough capacity is available to handle the scheduling blocks, then the operation's total time can be reduced.

4. The **Queue Hours** field defines how long materials wait before work begins on them.

   This is the average number of hours that parts 'sit' before work begins using this resource group. Kinetic adds the time to the estimated operation hours when operations are scheduled for this resource group.

5. The **Move Hours** field indicates how long materials wait after the last operation is complete before they move on to the next resource group.

   This is the average number of hours parts 'sit' when they leave a particular resource group before the next operation begins, or the number of hours it takes to move the parts from one resource group to another. Kinetic adds the time to the estimated operation hours when operations are scheduled for this resource group.

6. In the **Min Overload %** field, enter an overload value.

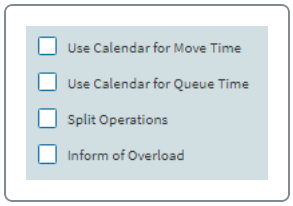
   This specifies the minimum overload percentage that this resource group should display on the 'Overload Informer'. By default, the field is set to '0', meaning that any overload displays on the 'Overload Informer'.

7. The **Daily Production Capacity** is a non-time constraint you can use to measure the available capacity on a resource. It defines the amount of non-time units a resource can produce during

a working day. Resources that use non-time constraints to measure capacity typically referred to as **Batch** resources. These resources can combine materials from multiple jobs into a single batch for production. Non-time constraints only work when you use the **Finite Capacity** calculation (finite scheduling) against your resources.

For example, a resource may only be able to produce a 10 quantity of cubit yards of cement per working day, or an oven only has 4 racks that can be filled per working day. When you enter the Daily Production Capacity for a resource or a resource group, the scheduling engine will not schedule more load against this capacity constraint - even if there is capacity available.

8. Define the rest of the scheduling related options.

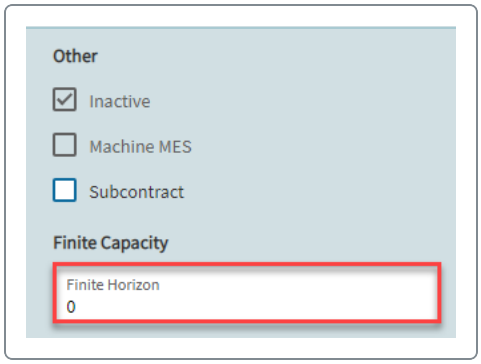


The options include:

- Select the **Use Calendar for Move Time** check box to use the calendar for move time.
- Select the **Use Calendar for Queue Time** check box to use the calendar for queue time.
- Select the **Split Operations** check box if you want to divide production time on a resource evenly between multiple scheduling blocks at different points within the schedule for all resources in this resource group.

  As the engine allocates scheduling blocks against a resource, it can separate these blocks at points wherever capacity is available. When you select this check box, the scheduling engine can create scheduling blocks that produce fractions of quantities like 33 or 34. The split means that a part quantity can be started during one scheduling block but then finished during another scheduling block.
- Select the **Inform of Overload** check box to indicate that you want overload information from this resource group to display on the Overload Informer when it occurs.

9. In the **Finite Horizon** field, enter a finite horizon value in production days.



The 'Finite' capacity represents a resource group that has a certain number of machines working for a certain number of hours in a day, and job operations cannot exceed this capacity. The value you enter in this field specifies how many days ahead of the current date load is calculated.

- The finite horizon is the default for each resource you add to this resource group. However, you can change this value at the resource level.
- The value you enter cannot be greater than the horizon value defined for a site in the 'Site' app, with an exception of zero. If you attempt to change the value in this field and you enter a value that is greater than the value defined in the 'Site' app, then the **Horizon value cannot be greater than Horizon of the site XXXX** error message displays (where XXXX are your site).
- Finite Horizon Hierarchy = **Resource > Resource Group > Site**

10. Select **Save**.
11. Remain in the Resource Group app.

Define Calendar Exceptions

Next, enter working day exceptions for the resource group with regards to the calendar assigned to the resource group using the **Calendar Exceptions** card.

The '168' ton 'Mold Machines' resource group is always shut down for routine maintenance for '4' hours on the third 'Friday' of every month. However, the calendar assigned to the resource group is setup to work '8' hours every 'Friday', so you would need to use this sheet to establish the '4-hour' calendar exception for the third 'Frida'y of every month for this resource group.

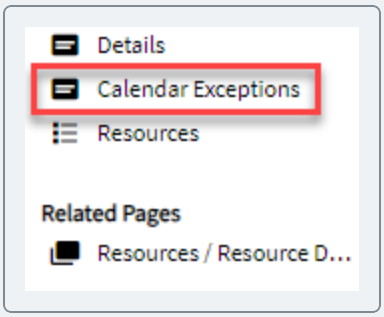
When scheduling, 'Kinetic' checks to see if calendar exceptions exist at the resource level first. If exceptions exist, then 'Kinetic' will create the schedule around those

exceptions. If no calendar exceptions exist at the resource level then 'Kinetic' checks for calendar exceptions at the resource group level. If exceptions exist here then 'Kinetic' will schedule appropriately around those exceptions. If the resource has a calendar defined, only the exceptions for the resource will be honored.

To define calendar exceptions:

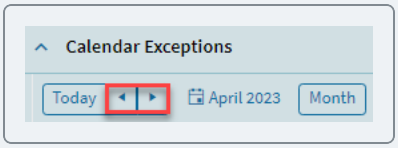
1. Scroll slightly down to locate the **Calendar Exceptions** card and expand it.

   You can also select the 'Calendar Exception' node in the Nav tree.

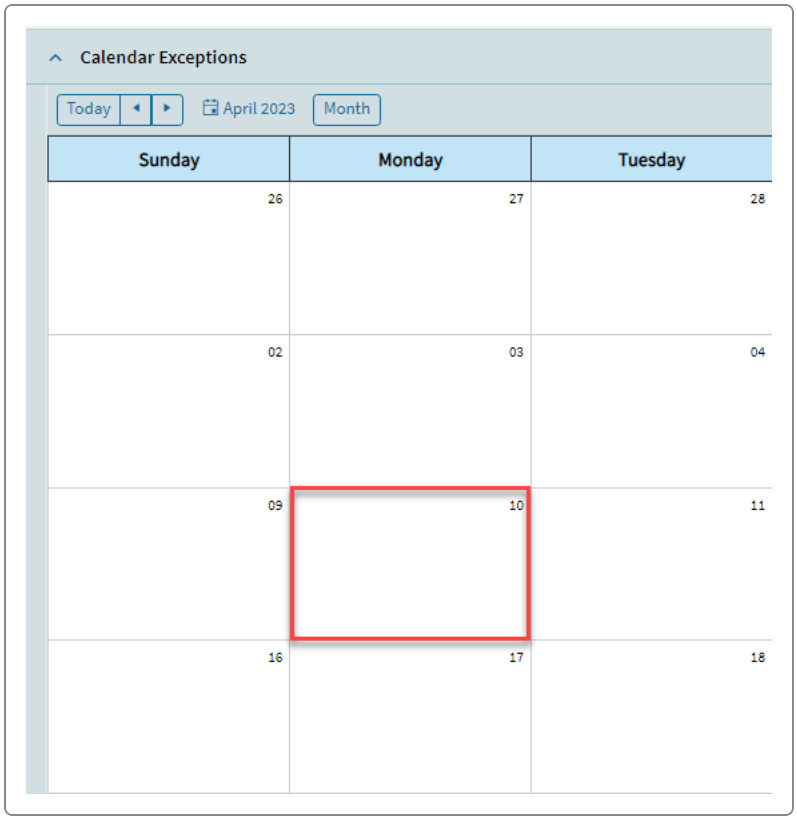
2. On the **Calendar Exceptions** card, select the date on which the hours normally worked, but now on a specific date will be different.

   To navigate to the month you want, use the 'forward' and 'backward' buttons.

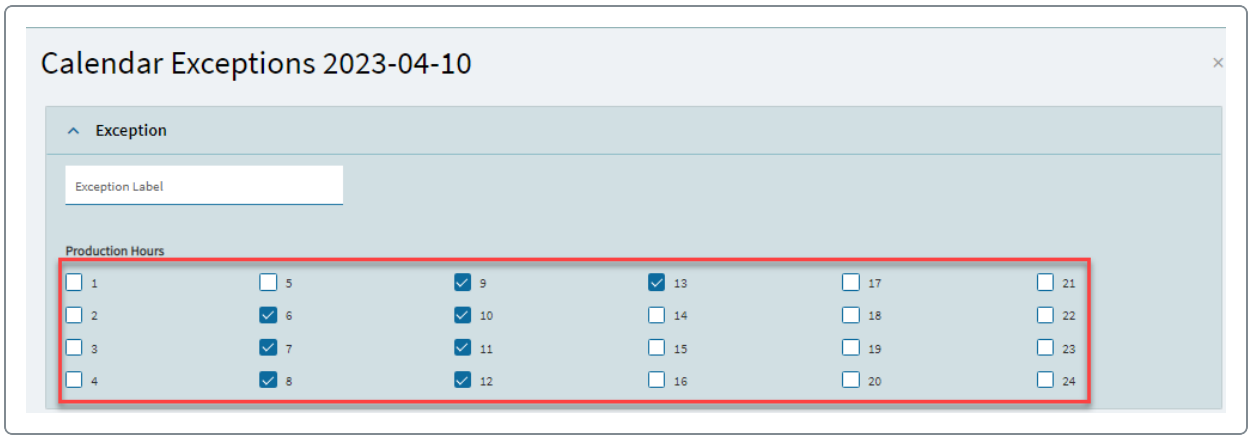
3. Double-click the day inside the calendar.

   The Calendar Exceptions panel opens.



In this case, we double-clicked '10th April' of '2023'.

4. Inside the panel, select or clear the check boxes to indicate the hours during which work will or won't occur on this date using the **Production Hours** group box.



5. Inside the panel, enter a label for you exceptions using the **Exception Label** field.
6. Select **OK** to confirm and to close the panel.

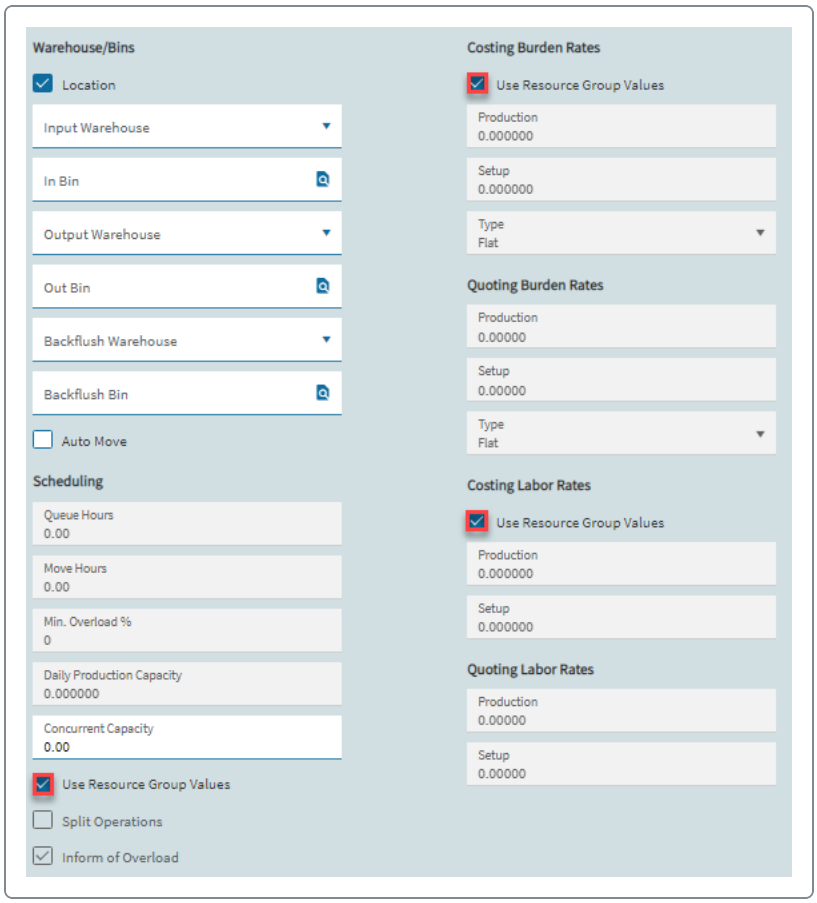
7. Select **Save**.

8. Remain in the **Resource Group** app.

Add a Resource to a Resource Group

Next, learn how to add a resource to a resource group.

When you add a resource, you can define different values to the resource group the resource belongs to or the added resource can have the same values, depending on whether you clear or select the 'Use Resource Group Values' check box.



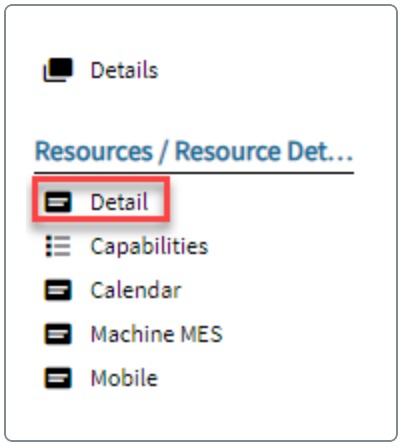
In this article, we will only cover settings that are resource specific and you cannot define them at the 'Resource Group' level using the 'Details' card. The majority of the setting are the same as on the 'Detail's card.

1. You are on the **Details** card.

   > If the 'Details' card does not display, in the Nav Tree, select the **Details** node.
   >
   > This is the very top node.

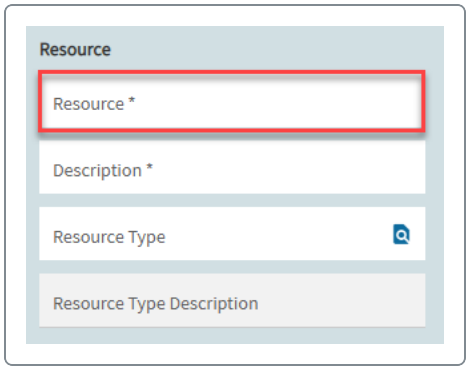
2. In the Nav Tree, select the **Resources > Details** node.

   The **Details** card displays.



3. Select **New**.

4. In the **Resource** field, enter the unique identifier for the resource.



   > From here onwards, we will only address the settings that are 'resource' specific.

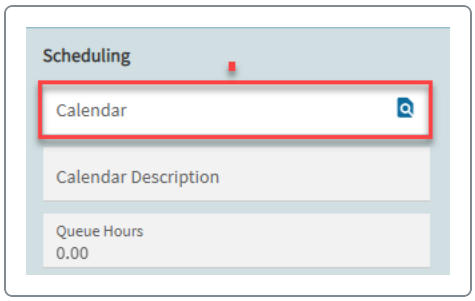
5. Enter a description for the resource you are entering.

6. In the **Resource Type** field, search for and select a resource type.

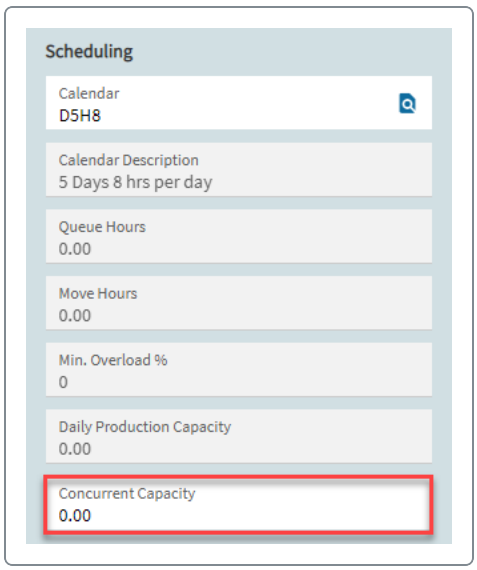
This depends on what type of a resource group you want to create. The options include:

- Cell (C)
- Machine (M)
- People (P)

7. Specify a production calendar if different from the calendar defined at the resource group level.



8. In the **Concurrent Capacity** field, enter a value that specifies the amount of capacity available on the resource that can run during a specific moment in time.



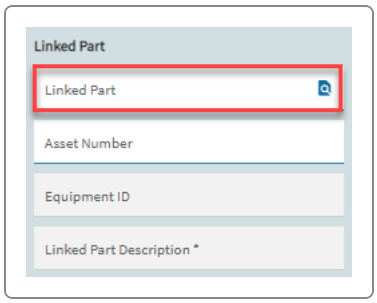
This value is a non-time constraint that prevents scheduled operations from overloading the resource. This is because the resource has, at any given time, only this defined amount of concurrent capacity available.

Use this value when you have different operations with items you produce using the same resource. If this value is defined, the engine adds another modifier in addition to time. When this 'Concurrent Capacity' value is reached, the engine will not schedule additional operations at this resource – even if more capacity or time is available. The engine will then schedule the operation when both time and concurrent capacity are available.

For example, 'Operation A' needs an oven rack from '1:15' to '3:30'. If 'Operation B' is already using '4' racks between '2:01' to '2:15', 'Operation A' will not be scheduled during this requested time. If you forward schedule then 'Operation A' would be rescheduled with a new start time of '2:15'. If you backward schedule then 'Operation A' would be rescheduled using a new end time of '2:01'.

The scheduling engine checks to make sure the concurrent capacity for a resource is not exceeded during a specific time. If concurrent capacity is exceeded then 'Kinetic' schedules the operation at the next available time.

9. If the resource is a tool or something else has a part number associated with it, search for and select a part in the Linked Part field.



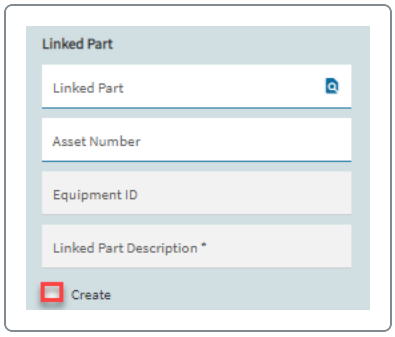
10. If applicable, specify the asset number for this resource using the **Asset Number** field.

    Asset Number License Rules

    - If you don't have the 'Asset Management' license installed, the 'Asset Number' field remains active and you can enter a value in this field. However, the entered value is for informational purposes only.
    - If you do have the 'Asset Management' license installed then 'Kinetic' will link the asset value you enter in this field with the existing asset record entered in the 'Asset' app.

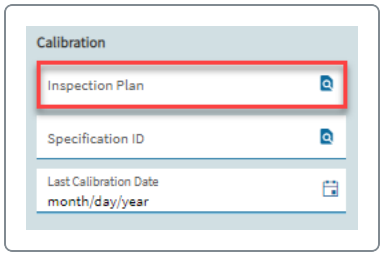
11. The **Equipment ID** field displays the identifier for the equipment record (if any) associated with this resource.

12. Select the **Create** check box to specify if a capital equipment record should be created for this resource.



Select the check box to create an equipment record for use in the 'Maintenance Management' module. This allows you to identify the resource as a capital piece of equipment, for which maintenance tasks are being tracked. You can update the resulting record in the 'Equipment' app.

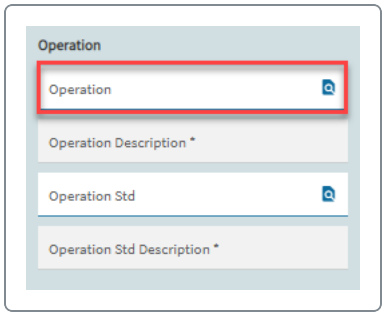
13. In the Inspection Plan field, search for and select an inspection plan being used for calibration of the piece of equipment (if any) associated with this resource.



14. In the Specification ID field, search for and select a specification being used for calibration of the piece of equipment (if any) associated with this resource.

15. The Last Calibration Date specifies a date when the item was calibrated using the 'Inspection Data Entry' app.

16. In the **Operation** field, search for and select an operation you want to associate with this resource.



When this resource is added to a method of manufacture (routing) during 'Job Entry', 'Quote Entry', or in the 'Engineering Workbench', this operation is the one used to create the operation sequence.

17. In the **Operation Standard** field, search for and select the operation standards you want to associate with this operation.

    The default setup and production estimates from this operation standard will also be the defaults for any 'job', 'quote', or 'part', where this resource is part of the method of manufacture.

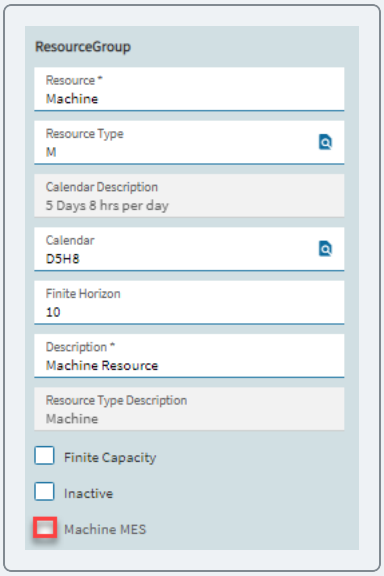
18. Scroll slightly down to locate the **Capabilities** card and expand it.

    The card displays capabilities the resource is linked to. You link resources to capabilities in the 'Capability' app.

19. Scroll slightly down to locate the **Machine MES** card and expand it.

    This card whether the entered resource will be synchronized with a machine Data Collection (DC). Use this card to define certain resource parameters that apply to a machine DC tool only.

    The card is only available for entries, if the added resource is set to 'Machine MES'.

    You can specify the following fields:

- **Num Cavs** - The total number of cavities for the tool. If the resource type for the resource is T (Tool), the value cannot be 0.
- **Runner Wt** - The amount of excess material that is consumed during a machine cycle and that does not go into the resulting part.
- **Setup Time** - An estimate of the amount of time that is required to setup the tool before the job will be ready to produce parts. The Job Schedule uses this value to adjust forecasted start/end times for non-running jobs.
- **Tear Down Time** - An estimate of the time that is required to tear down/uninstall this tool after the job is complete. The Job Scheduled uses this value to adjust forecasted start times. Tear down time is not supported in Kinetic, but it is in Advanced MES (Mattec). You enter the time in minutes.
- **Misc Info** - Additional notes about the tool. This is a user definable field.
- **Brand** - The tool maker for the tool.
- **Loc ID** - Location of the tool.
- **Pm Map No** - The preventative maintenance map selected for this tool. PM maps are collections of PM codes used for preventive maintenance tracking and forecasting. When you create machine maintenance codes, you can set up the application to forecast the next maintenance based on the machine run time, calendar time, or machine cycles.
- **Setup URL** - A web address (URL) of a setup sheet that is associated with this tool. You can view the web-based setup sheet using the Document Control Center or by pressing the View Document button. The Setup URL displays in the Mattec application to the shop floor and can be used to set up instructions.
- **Sync Required** - Indicates that data for a resource record has changed and a synchronization to the Mattec MES application is required to synchronize the data. This check box is automatically selected when the data between Kinetic and the machine DC application for this resource is out of sync.

  The Sync Required check box enables for new resources and when any of the following data changes for an existing resource that synchronizes with a machine DC:

  - Resource type
  - Machine MES (check box)
  - Number of cavities
  - Runner weight
  - Resource description
  - Setup time and tear down time
  - Status
  - Miscellaneous info
  - Brand and location

        - (PM) Preventative maintenance map
        - Setup URL
    - **Last Sync** - The date and time that this resource record was last synchronized between Kinetic and the machine DC.

20. To set your resource to Mobile Resource, scroll slightly down to locate the **Mobile** card and expand it.

21. Select the **Epicor Mobile Resource** check box.

    Mobile resources are used in the 'Mobile' applications and are linked to mobile operations. A mobile operation must satisfy one of the following criteria:

    - At least one resource marked as 'Mobile Resource' must be linked to a mobile operation in the 'Job Entry' app and an employee record in the 'Employee' app. The resource must be set to 'Location' in the 'Resource Group' app.
    - At least one resource group that includes a resource marked as 'Epicor Mobile Resource' must be linked to a mobile operation in the 'Job Entry' app. The resource group must be set to 'Location' in the 'Resource Group' app.

    When you assign a resource group record, which contains a mobile resource, to a mobile operation in the 'Job Entry' app then the 'Resource' field located in the 'Job Entry' app must be void.

22. Select **Save**.

23. Exit the **Resource Group** app.

Adding Equipment

In **Equipment Maintenance**, add equipment installed and used in a manufacturing or distribution facility. This includes internal capital equipment, tools, gauges, and fixtures such as air conditioning units, forklifts, shelving, and shop floor tools.

Each equipment contains crucial data required to track and manage preventative maintenance tasks in the Maintenance Management module. You can also define detailed maintenance plans for the equipment item the app triggers based on specified time or meter intervals. Additionally, add free-form quality assurance specification and comment text for the equipment.

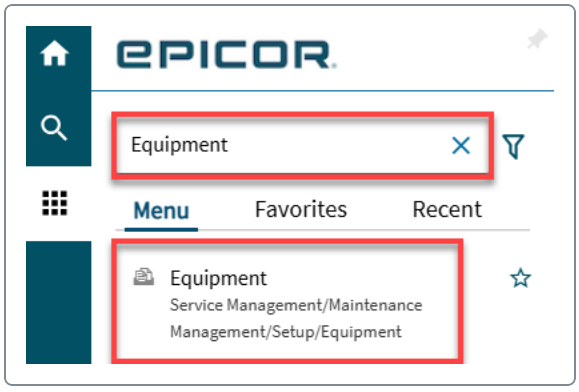
ABC Capital Manufacturing is anxious to track all of their installed capital equipment and serviceable items in their new Kinetic application. The current methods their service department use are very archaic and do not yield much in the way of usable information.

Among the equipment records ABC wishes to create are for a fire extinguisher, and for a company vehicle. A time-based safety check is routinely performed on the fire extinguisher every 30 days, and a meter-based oil change is performed on the company vehicle at 5,000 mile odometer intervals.

This only includes internal equipment you use and maintain in your own operations. You must use the Field Service module instead of the Maintenance Management module to manage preventative maintenance performed on equipment sold to customers.

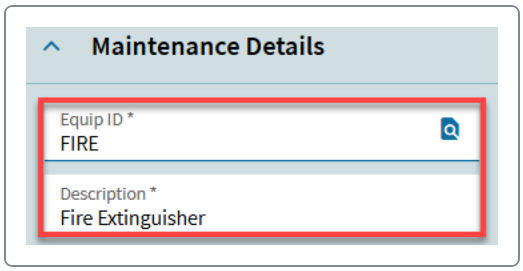
Adding Equipment

1. From the main menu, navigate to **Service Management > Maintenance Management > Setup > Equipment**.
2. Open the **Equipment Maintenance** app.



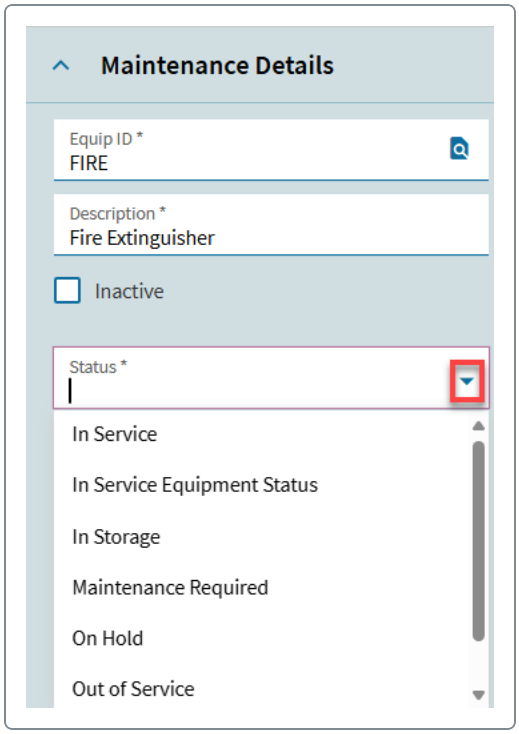
3. To add a new equipment, select **New**.

4. In the **Equipment ID** field, enter **FIRE**.
5. In the **Description** field, enter **Fire Extinguisher**.



6. In the **Status** field, define a status.

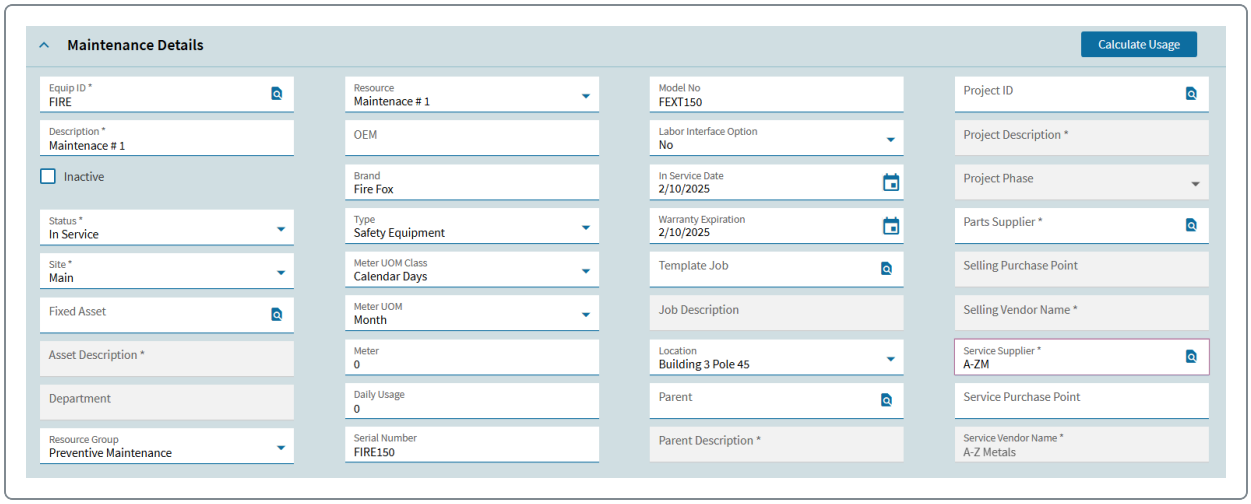
Specifies the code denoting the current status of a piece of equipment. For example, 'Out-of-Service' or 'In Service'.



7. In the **Site** field, verify Main defaults.
8. In the **Resource Group** field, select **Preventive Maintenance**.

Identifies the resource group to which the piece of equipment belongs.

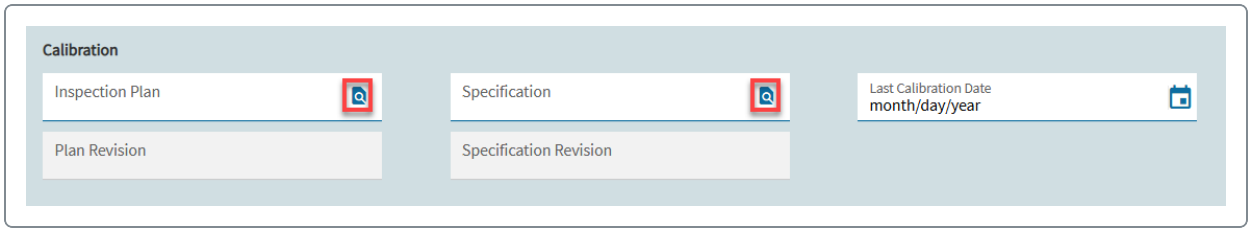
9. Define other values.



For example:

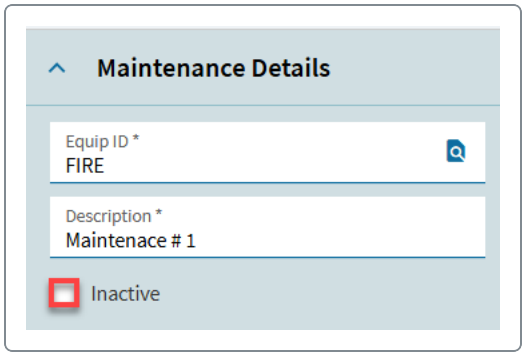
- **Serial Number** - Specifies the serial number for the piece of equipment.
- **Brand** - Specifies the brand name for the piece of equipment.
- **Type** - Specifies the type of equipment (for example, Requires Maintenance, Out-of-Service). This allows you to group similar types of equipment in a facility so you can track them on the Maintenance Management reports.
- **Labor Interface Option** - Specifies the labor interface option for this piece of equipment. This indicates if and how you can update equipment meter values from Labor Entry.
- **Meter UOM Class** - Specifies the unit of measure (UOM) class code that denotes the unit of measure class to which the meter UOM belongs.
- **Meter UOM** - Specifies the unit of measure (UOM) code that denotes the unit of measure (for example, Units, Hours, Minutes) in which meter readings for this piece of equipment are expressed.
- **In Service Date** - Specifies the date on which the equipment was placed into service.
- **Warranty Expiration** - Specifies the date on which the equipment warranty expires.
- **Location** - Specifies the code denoting the location of the piece of equipment. This allows you to group equipment by location so you can track them on Maintenance Management reports.

10. If required, select an **Inspection Plan** or **Specification**.



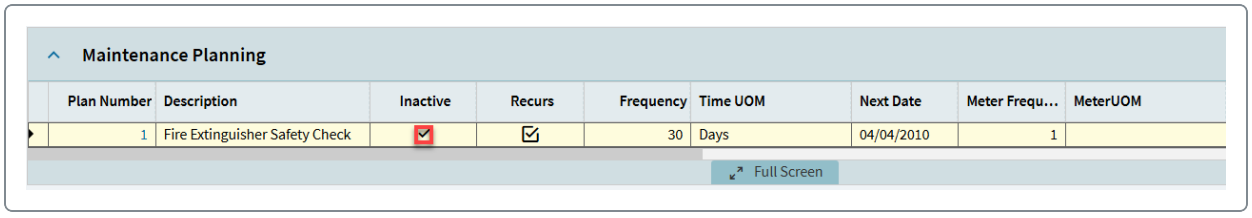
- **Inspection Plan** - Inspection plans control the inspection process and are used to enter the results from inspecting those parts, operations, and RMAs in which specifications and inspection plans are defined. Once you create an inspection plan using the 'Inspection Plan Maintenance' app, you then link it to your operation and materials as required. This is when you create a method of manufacture.
- **Specification** - A specification ties together the inspection attributes you want. In the 'Specification Maintenance' app, you can define inspection attributes and features unique to your business. These include but are not limited to numeric character, dates, and comments on the production and inspection process. This allows the software to respond to you and the specific needs of your operation.

11. Select **Save**.
12. You can also inactivate an equipment by selecting the **Inactive** check box.

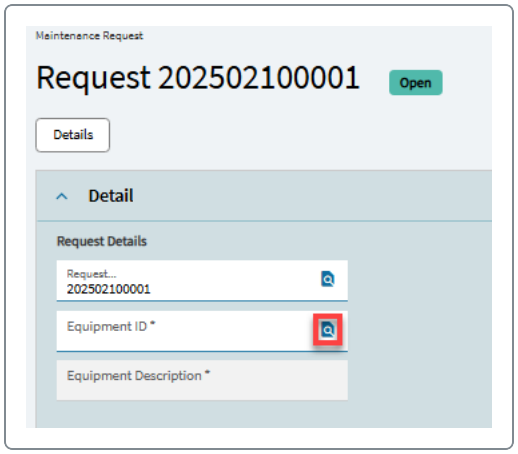


The following rules apply:

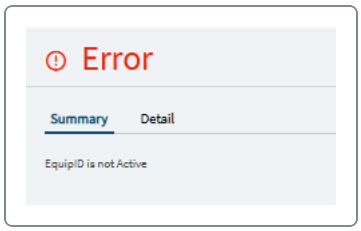
- If you inactivate an equipment then the maintenance plans defined for this equipment inactivate as well.



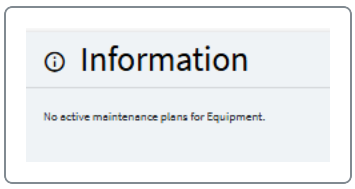
- You cannot make a request for inactive equipment in the 'Request Entry' app.

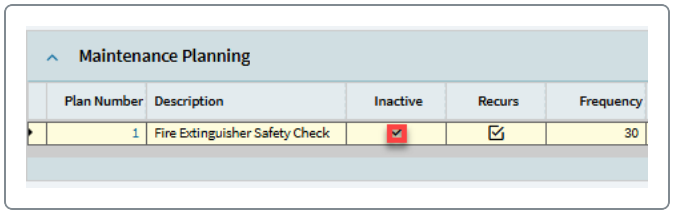


If you do so then the 'Request Entry' app displays the error message informing you that the equipment you want to add is inactive.



- If you try to activate an inactive 'Equipment' record then the 'Information' message displays informing you that you must also activate the maintenance plans tied to this equipment.



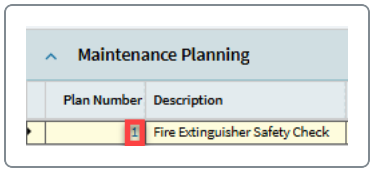


- You cannot activate inactive 'Maintenance Plans' on inactive 'Equipment' records.
- If an equipment is inactive, you cannot manually create maintenance jobs and Kinetic will not generate them.

Create an Equipment Plan

1. Select **New** in the **Maintenance Planning** card to add a new service equipment plan.
2. Click the **Plan Number** link.

   The **Maintenance Plan Details** card displays.



3. In the **Description** field, enter **Safety Check**.
4. Accept the default of **Recurring**.

   Specifies if this maintenance recurs on a continuing basis.

5. If you want to inactive an existing maintenance plan, select the **Inactive** check box. However, you would not do this when entering a new maintenance plan.

   If you inactivate an equipment then the maintenance plan(s) defined for this equipment automatically inactivate as well.

6. In the **Frequency** field, enter **30** and press **Tab**.
7. In the **Time UOM** field, select **Days**.
8. Notice the **Next Execute Date** is **30** days from today's date.

   For example, if the maintenance takes place every '180' days, enter '180'. If it takes place every two years, enter '2'. Kinetic uses this value, and the time interval ('Days', 'Weeks', 'Months' or 'Years') selected in the field to the right to calculate the dates on which the maintenance occurs.

9. In the **String** field, enter **SAFE** and press **Tab**.

   A character string represents the topic identifier (as defined in the 'Topic Maintenance' app) being assigned to this maintenance plan. This denotes the types of maintenance tasks (for example, 'Lubrication', 'Adjustment', 'Filter

Change') performed for this plan.

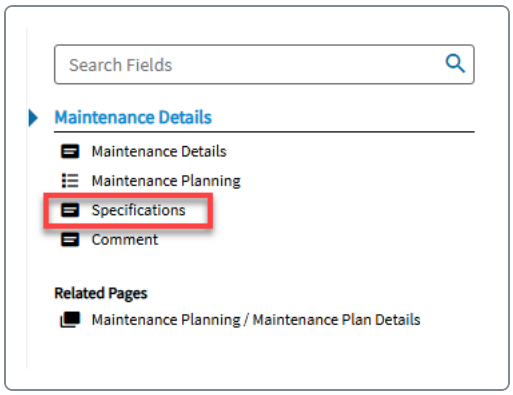
10. Select **Save**.

Adding Specifications for the equipment

In the **Specifications** card, enter a free-form text for the equipment. You can use it for reference on 'Maintenance Management' reports.

1. In the Nav tree, select the **Specifications** node.

   The **Specifications** card displays.



Creating Topics and Sub-Topics for Cases

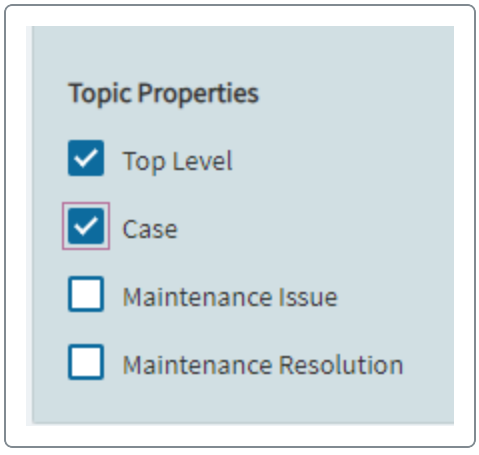
Define the issues, or topics, that people working with customers can assign to cases. These topics provide helpful information about the subject of each case and can assist service representatives in troubleshooting. You can create topics, and up to 10 levels of sub-topics for each one, using **Topic Maintenance**. You are not required to use topics, but they can provide historical information for managing cases and evaluating case issues. As a result, you can further subdivide the scope of contact with a customer.

Entering Topics

To add a top-level topic:

1. From the main menu, navigate to **Sales Management > Case Management > Setup > Topic**.
2. Select **New** to add a add a new topic.
3. Enter a unique code for the topic in the **Topic ID** field, such as BATTERY and its description.
4. Since this topic is at the top level and can have parent topics beneath it, select the **Top Level** check box.
5. Select the **Case** check box. This indicates that this topic will be used in **Case Entry**.

   Note that you can also mark a topic for use in Maintenance Management by selecting the **Maintenance Issue** check box, or as a resolution topic in Maintenance Management by selecting the **Maintenance Resolution** check box.



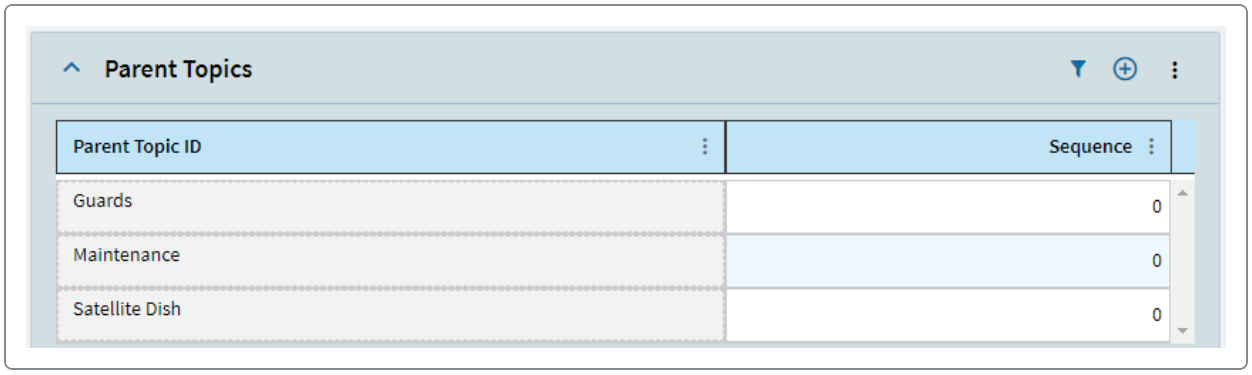
6. Select **Save**.

To delete a topic select the **Overflow menu** and then select **Delete**.

Entering Parent Topics

To add a parent topic:

1. Select **New** to add a add a new topic.
2. Enter a unique code for the topic in the **Topic ID** field, such as VENTILATOR and its description.
3. Leave the **Top Level** check box unselected. This indicates that this is a sub-topic. Save the topic.
4. On the **Parent Topics** card, select **New**.
5. Select the parent topic ID from the list. Only topics you define as a top level topic display as options.
6. Enter the sequence number to indicate where this topic should display in the **Parent Sequence** field.



7. Select **Save**.

Creating Maintenance Operations

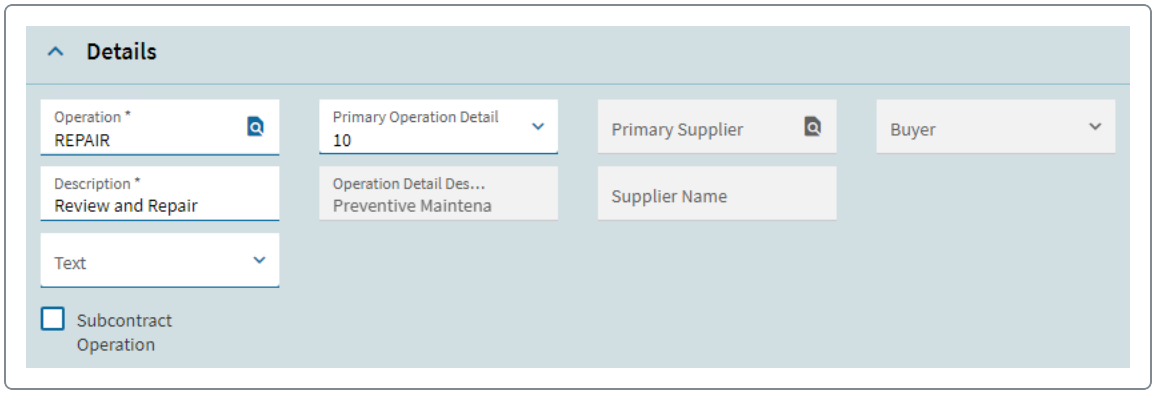
In **Maintenance Operation Maintenance** you create specific operations required to complete a maintenance job. You then add these operations to a maintenance job in **Maintenance Job Entry**.

For example, maintenance operations can be **Remove Panel A**, **Switch off Electrical Power**, or **Open Valve C**. Maintenance operations can also be much more complex. They can include paragraphs of detailed instructions and guidance.

You define maintenance operations as internal or subcontract operations. Internal operations track hours and costs for all planned, and actual labor performed. Subcontract operations track movement of parts and costs associated with outside services.

Adding a Maintenance Operation

1. From the main menu, go to **Service Management > Maintenance Management > Setup > Maintenance Operation**.
2. Select **New** to add a new maintenance operation.
3. In the **Operation** field, enter a concise identifier for the maintenance operation.
4. Enter a brief explanation for the operation in the **Description** field.
5. In the **Text** field, select standard comments you want to print on the Maintenance Request and Maintenance Job Reports.
6. Select the **Subcontract Operation** check box, if an external source performs this operation. Clear the check box, if it is an internal operation.
7. For internal operations, select the **Primary Operation Detail** number.
8. For subcontract operations, select the **Primary Supplier**. You can also select the **Buyer** code for the subcontract operation.



9. Select **Save**.

Adding a Capability to a Maintenance Operation

A capability is a skill, or ability that a resource can possess. For example, a machine resource can have a **Shear** capability. A human resource can have an **Engineer** capability. The scheduling engine uses capabilities to search for available resources to complete the operation.

You can add capabilities only If you have the Advanced Planning and Scheduling license installed.

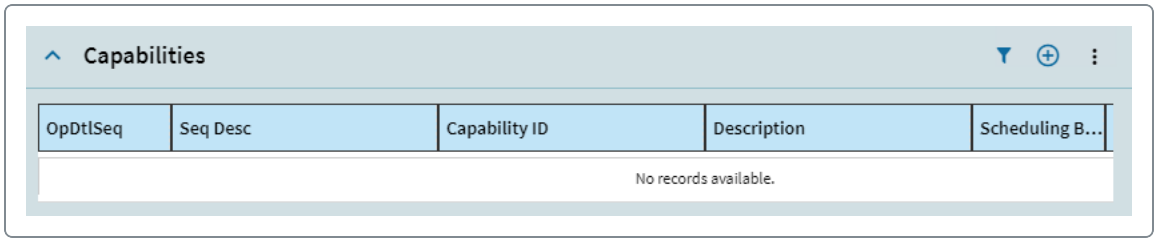
1. On the **Capabilities** card, select **New** to add a new capability to the operation.
2. Enter the **Capability ID**, and **Description**.
3. In the **Scheduling Blocks** field, enter the number of scheduling blocks available for this capability.

   Scheduling blocks are base units of time that the scheduling engine uses for calculations. They measure the load that you need to place against each resource's capacity.

   Each scheduling block specifies the amount of time that the app will allocate to handle the load. You use blocks to place Production Time on the schedule. The engine assigns scheduling blocks to a resource's available capacity. The blocks can vary in length. It depends on the production quantity, and any adjustments that you define on the resource group, or maintenance operation.
4. Specify the number of operators that will work simultaneously in production and setup crews.

   Kinetic uses these values as multipliers to calculate the estimated labor hours for each maintenance operation.

Do not confuse crew size with resources per maintenance operation. Think of crew size as a factor that increases your planned labor cost, because more people will work on the job.



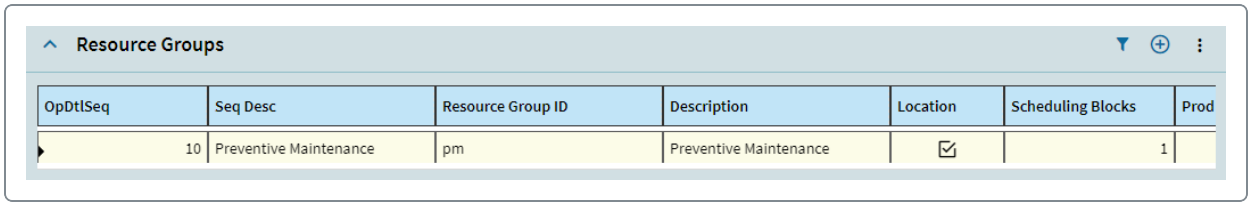
5. Select **Save**.

Assigning Resources or Resource Groups

1. Select **New** to add a new resource, or resource group on the **Resources**, or the **Resource Groups** card.

> If you have the Advanced Planning and Scheduling license installed, you can add an extensive number of resource groups, and resources to the operation.

2. Enter the identifier and description for the resource/resource group.
3. Enter the **Number of Scheduling Blocks**, **Prod Crew Size**, and **Setup Crew Size**.



4. Select **Save**.

Adding Operation Text

Operation text records are standard comments associated with a job operation. In Operation Text Maintenance, you can set up standard instructions or warnings as operation text records, then associate them with specific operations. You can also create an inspection sign-off line as operation text, then associate it with an operation that ordinarily requires inspection.

The app prints the text on the traveler report whenever the traveler includes an operation that uses this operation text. For example, **Acc: ___ Rej: ___ Date: _____ By: _____**

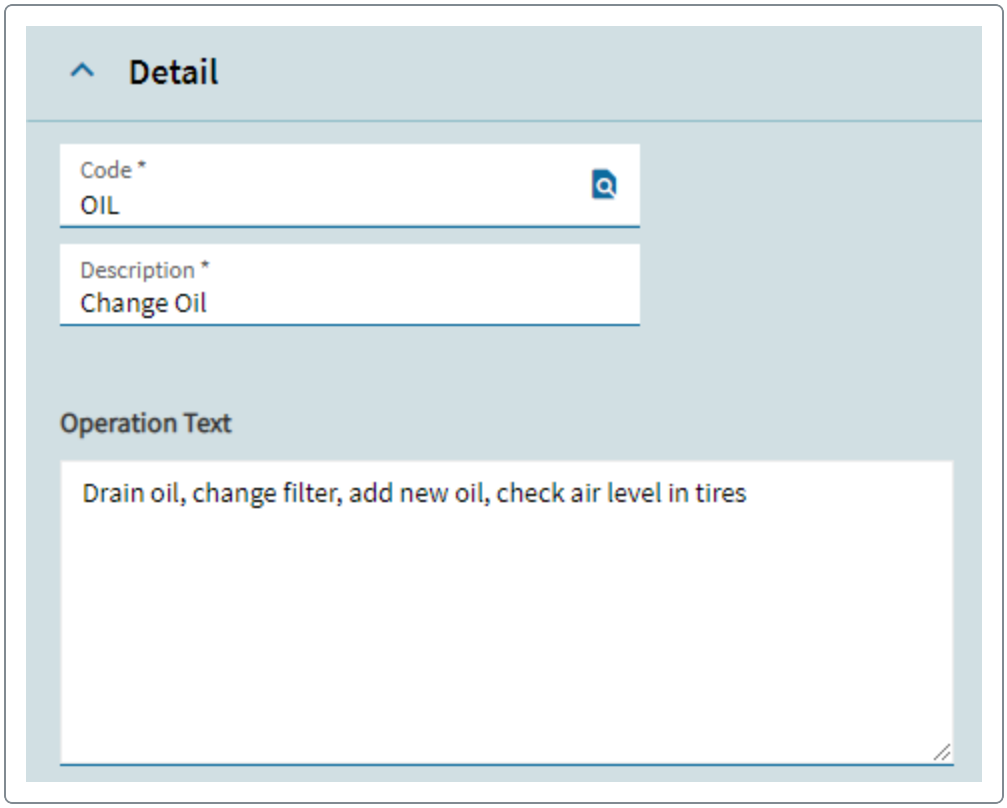
This example shows a standard sign-off line that inspectors can fill in on the report.

Operation text should not be confused with the Operation Description or Operation Comments. These apply to a specific operation on a specific part and can be overridden in Job Entry. Operation text is printed on the job traveler and does not display in Job Entry.

The purpose of operation text is to display generic requirements for an operation, whereas operation comments identify specific requirements for the selected operation.

To add operation text:

1. From the main menu, go to **Production Management > Job Management > Setup > Operation Text**.
2. Select **New** .
3. Enter the code and description.
4. Now enter the operation text.



5. Select **Save**.

Operations

This section details the operations available through Maintenance Management. Each operation is described as a workflow to help guide you through the process from start to finish. These applications are primarily found within the General Operations folder for this module. If a unique setup record is required to run the operation, this is also described in this section.

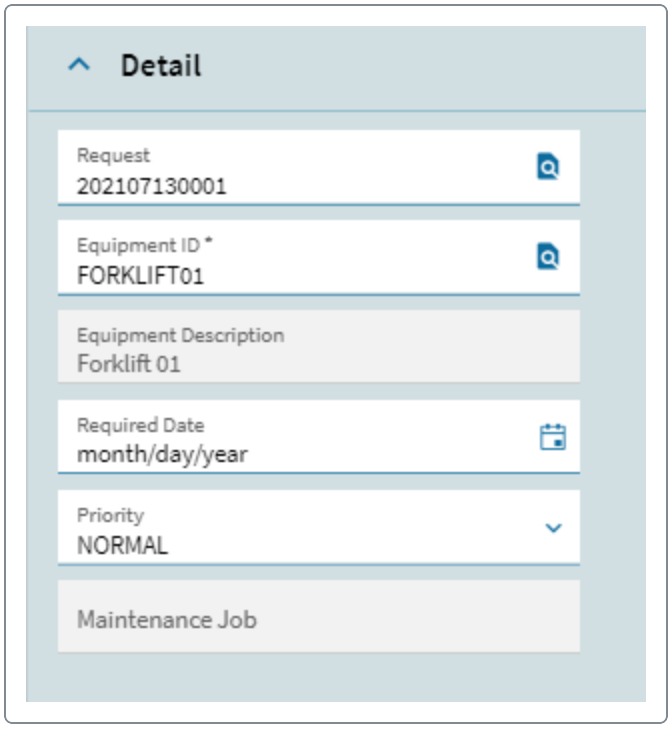
You may also need to set up some parameters in Company Configuration. Some modules have global settings you define through this administration application. For more information, review application help.

Creating Maintenance Requests

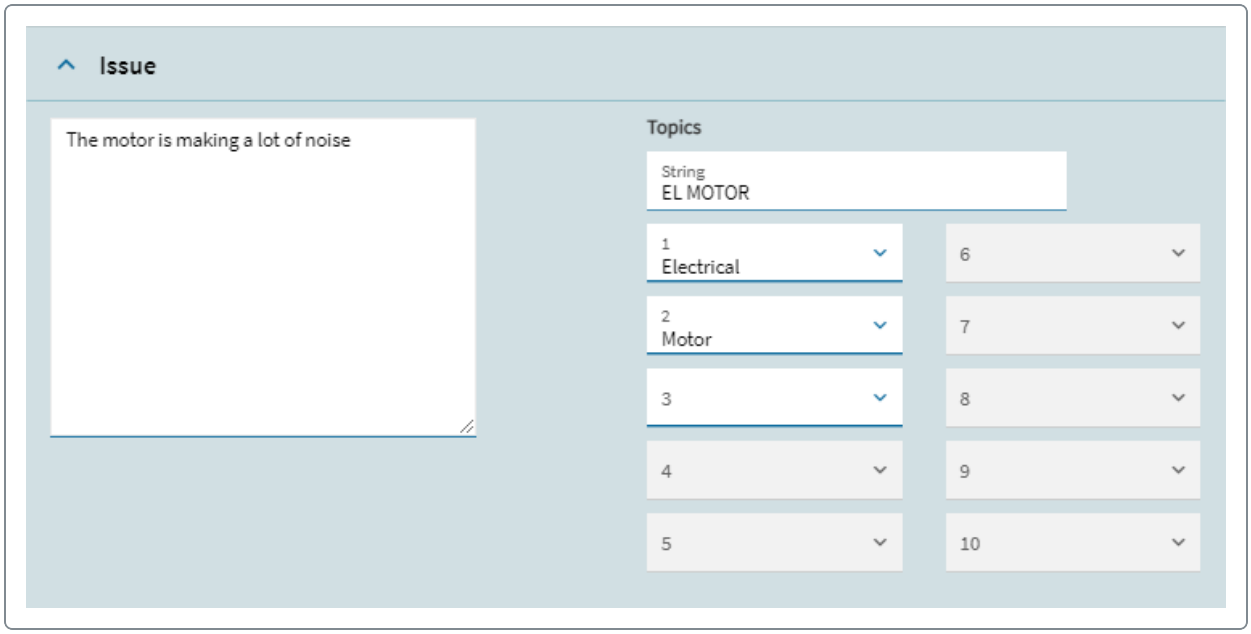
You can schedule facilities and production equipment for maintenance based on a predefined service interval, usage, time, or via manual requests. This can include internal capital equipment, tools, gauges, and fixtures– such as air conditioning units, forklifts, shelving, and shop floor tools.

Use **Maintenance Request Entry** to enter maintenance requests manually. Employees with the appropriate permissions can search for a particular piece of equipment based on some of the fields defined in Equipment Maintenance. After you select the equipment, you use predefined codes and enter free form description to identify the issues.

1. From the main menu, navigate to **Service Management > Maintenance Management > General Operations > Request Entry**.
2. Select **New** to add a new pending maintenance request.
3. A system-assigned identifier displays in the **Request** field. This value only displays for your information; you cannot change it.
4. Select the equipment ID for the piece of equipment that requires maintenance.
5. Enter the required date. This value defines the due date for when you finish the maintenance work.
6. Select the priority for the required maintenance.



7. In the **Issue** card, enter the description of the maintenance issues, and then select the **Topics** that categorize the nature of the required maintenance.



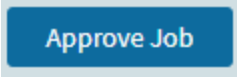
8. Select **Save**.

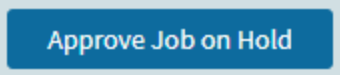
Your request is now waiting for disposition in the Maintenance Request Queue.

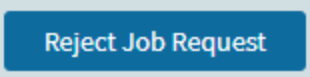
Using Maintenance Request Queue

After you enter a request for maintenance into **Maintenance Request Entry** and submit it for approval, it displays in the **Maintenance Request Queue**. A tradesperson or manager can then disposition the result. After you approved the request, a maintenance job is created and is linked to the submitted request. No further updates are made to the maintenance request until the maintenance job order is complete. Once the maintenance job order is finished, the status of the request automatically updates to Complete.

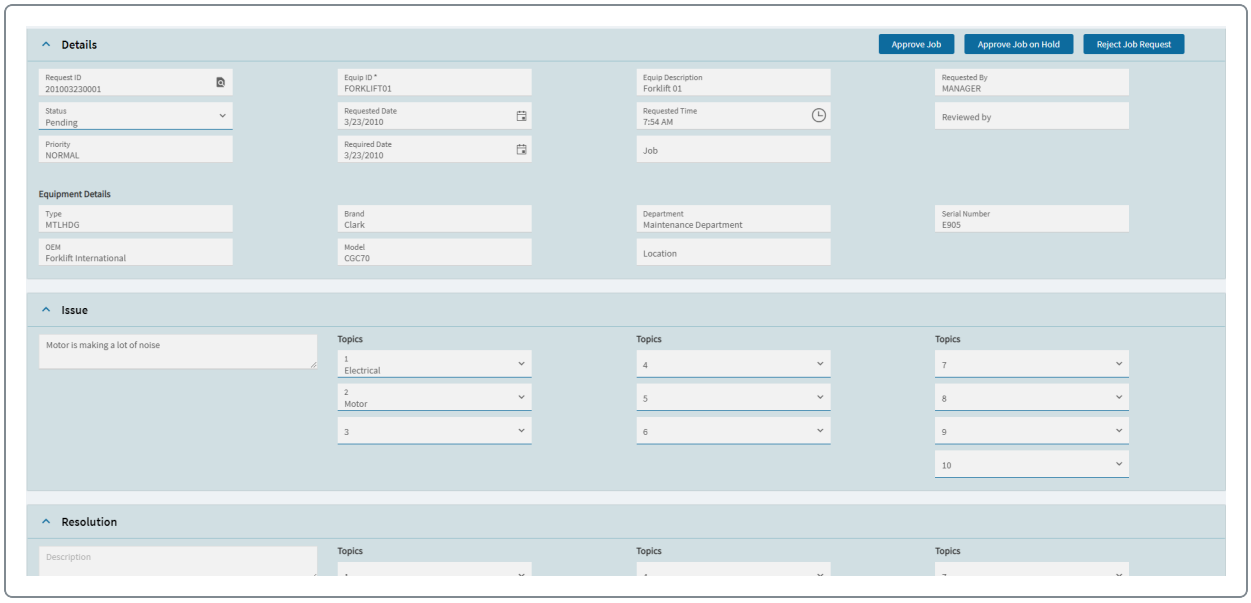
To disposition the pending maintenance request:

1. From the main menu, go to **Service Management > Maintenance Management > General Operations > Request Queue**.
2. Select the Request search button to find and select the maintenance request identifier or select it from the list.
3. To approve the maintenance request and create a maintenance job order, select the 

icon.
4. To approve the maintenance request and create a maintenance job order that is immediately placed on hold, select the 

icon.
5. To reject the maintenance request, select the 

icon. You must enter text that indicates the reason for the rejection.



6. Select **Save**.

Creating Maintenance Jobs

Using the **Maintenance Job Entry** app you enter maintenance jobs for a particular piece of equipment. A tradesman or manager can directly enter a maintenance job record to initiate and track the progress of maintenance.

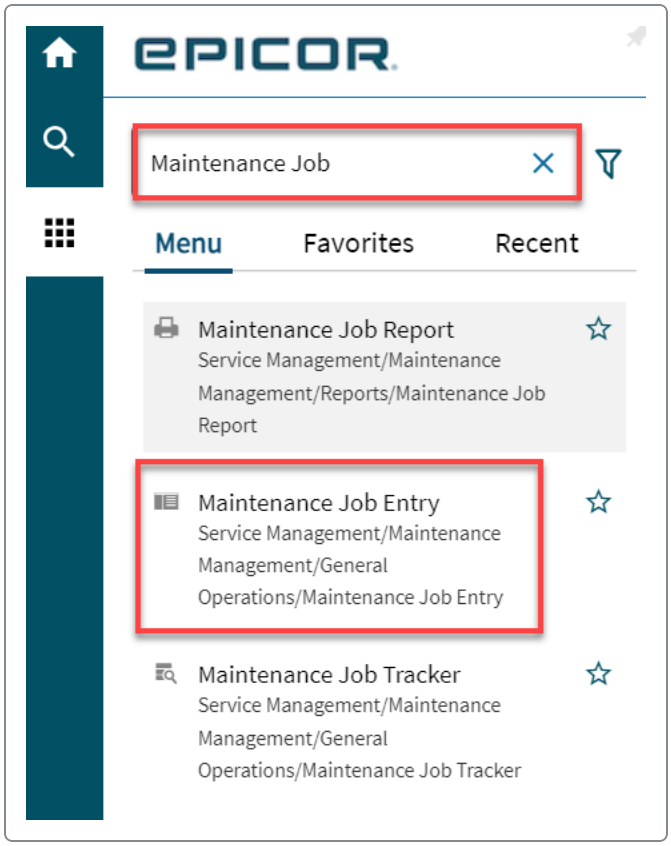
The app is a tailored version of the standard Job Entry, but designed for maintenance jobs only.

In this article, we will:

Creating Maintenance Job

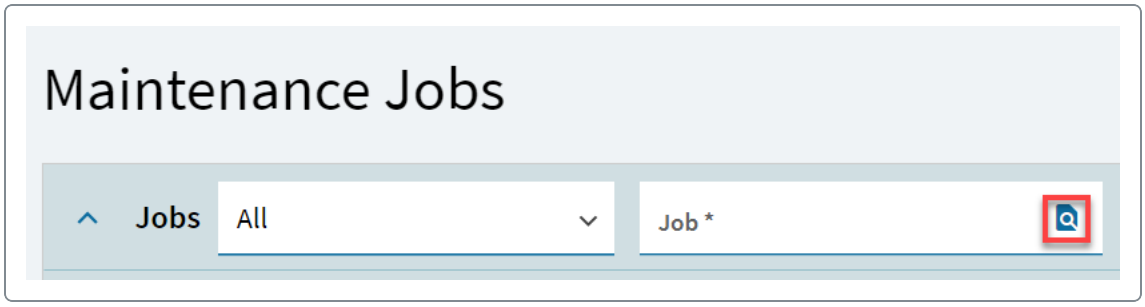
1. Open the **Maintenance Job Entry** app.

   The **Landing** page displays.



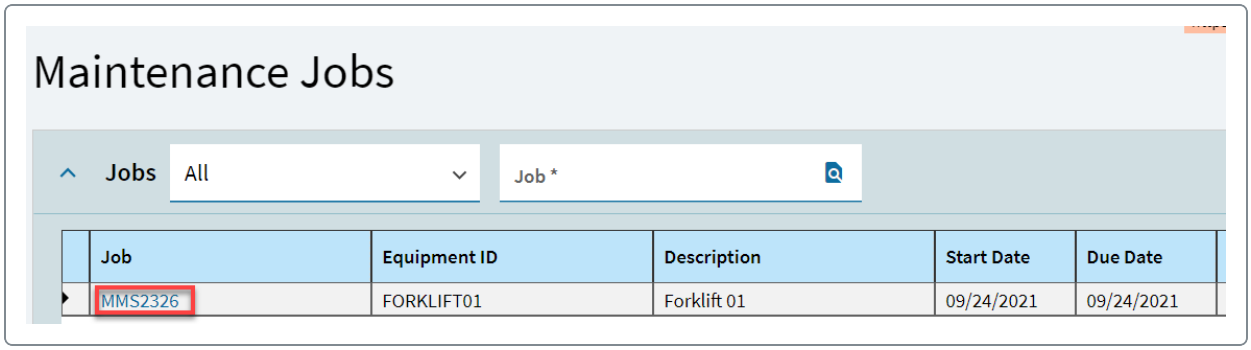
2. To select an existing maintenance job, search for and select it.

   The **Job Detail** card displays.



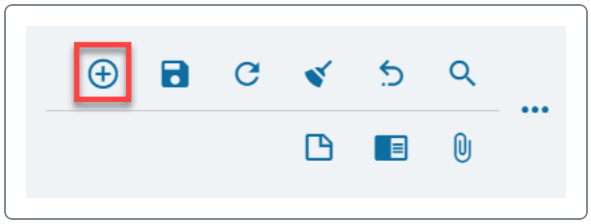
3. You can also select the job link inside the **Landing** page.

   The **Job Detail** card displays.



4. To add a new maintenance job, select **New Job**.

   The **New Job Number** panel opens.



5. In the panel, select the **Next Job** button.

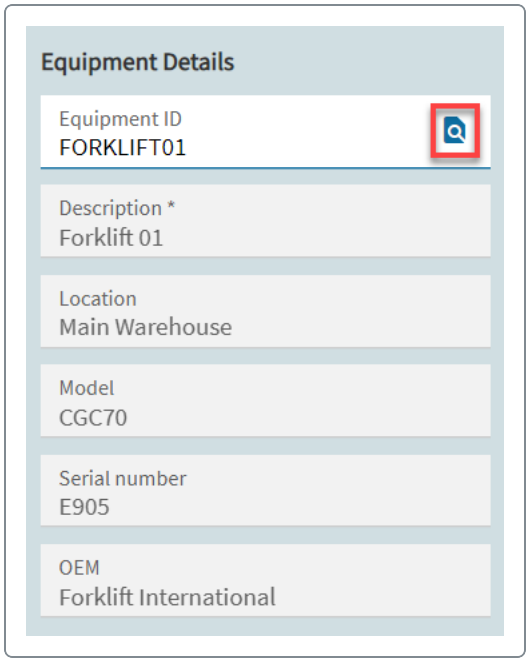
   Kinetic generates a new job number.

6. In the panel, select **OK** to confirm.

Entering Primary Maintenance Job Information

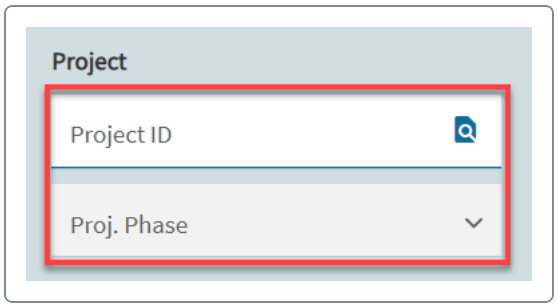
Next, specify the equipment details and other aspects of the job.

1. Search for and select the equipment for your job.

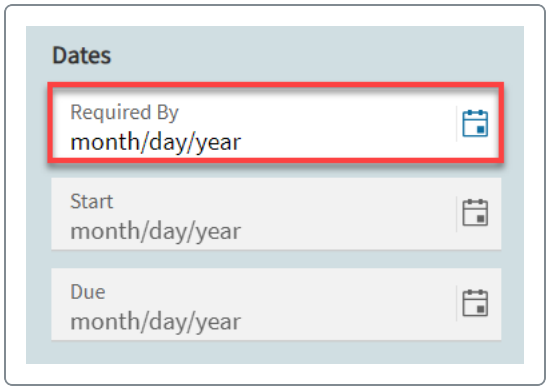


You cannot enter a job for the equipment marked as 'Inactive' in the 'Equipment Maintenance' app.

2. Optionally, select the **Project ID** and the **Proj. Phase** to specify which project requires this maintenance job.

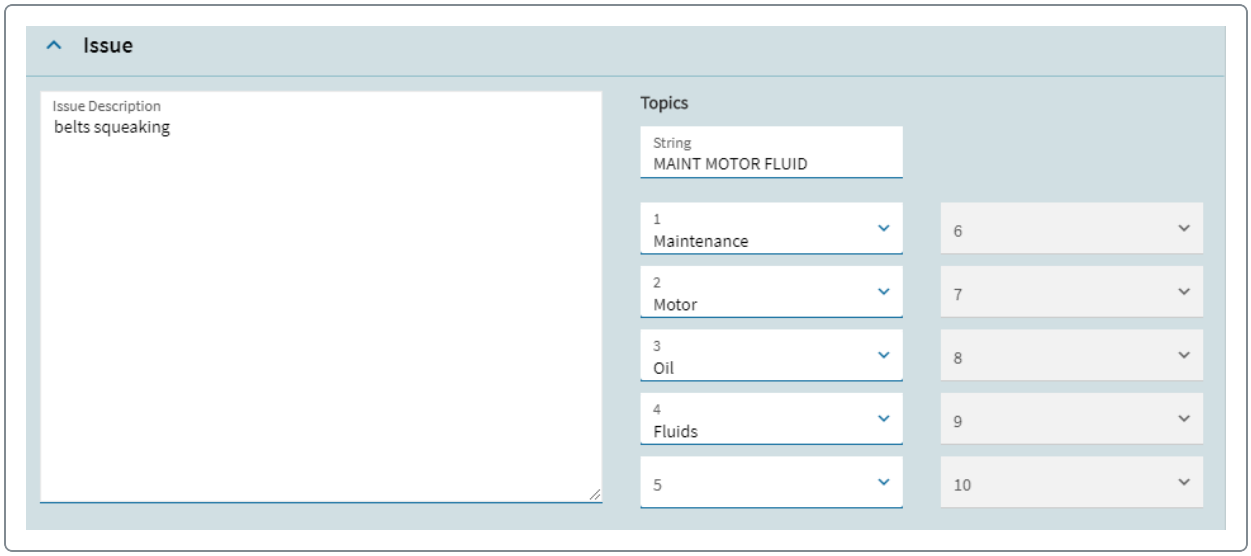


3. Enter the **Required By** date to set the date on which the job needs to complete.

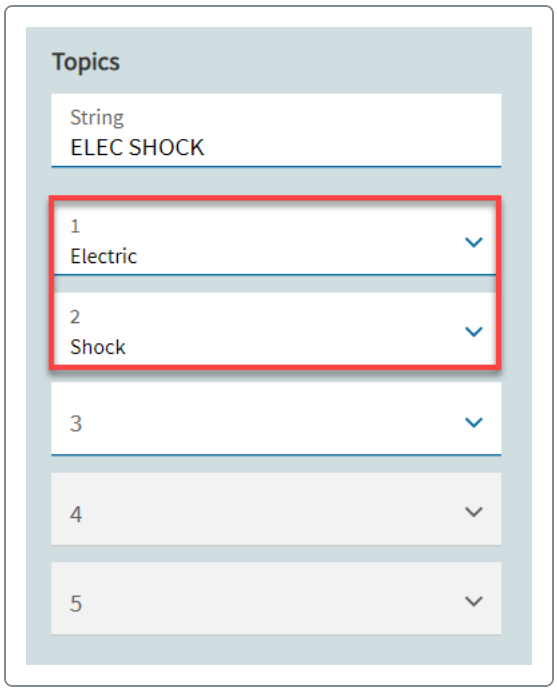


- **Priority** - Importance that this maintenance job will have within your schedule. If you globally finite schedule your jobs, this code determines which jobs need precedence over other jobs.
- **Schedule Locked** - Ensures that neither Global Scheduling nor Load Leveling features will change this job's schedule. When you lock the job's schedule, Kinetic removes any what-if schedule created for this job.
- **Machine MES** - Indicates that the maintenance job has integration with the Machine MES.
- **Mass Print** - Includes the maintenance job on the **Maintenance Job Report**.
- **Preventative** - Indicates the job in focus is for preventive maintenance.
- **Template** - Indicates that this job should be an option in the **Get Details** function. Only jobs with the **Template** check boxes selected display within **Get Details**. This check box helps you shorten how many jobs are available to copy for a specific part.
- **Hold** - Indicates the maintenance job is on hold.
- **Engineered** - Indicates that engineering is complete for this maintenance job. You need to engineer your job before scheduling it. You will not see non-engineered maintenance jobs on most reports.
- **Released** - Indicates if you have released the job to production. Only released jobs can have labor posted against them. Once you post labor to a job, you can't later change this field.

4. Scroll down to locate the **Issue** card.
5. In the **Issue** card, enter the reason for maintenance.

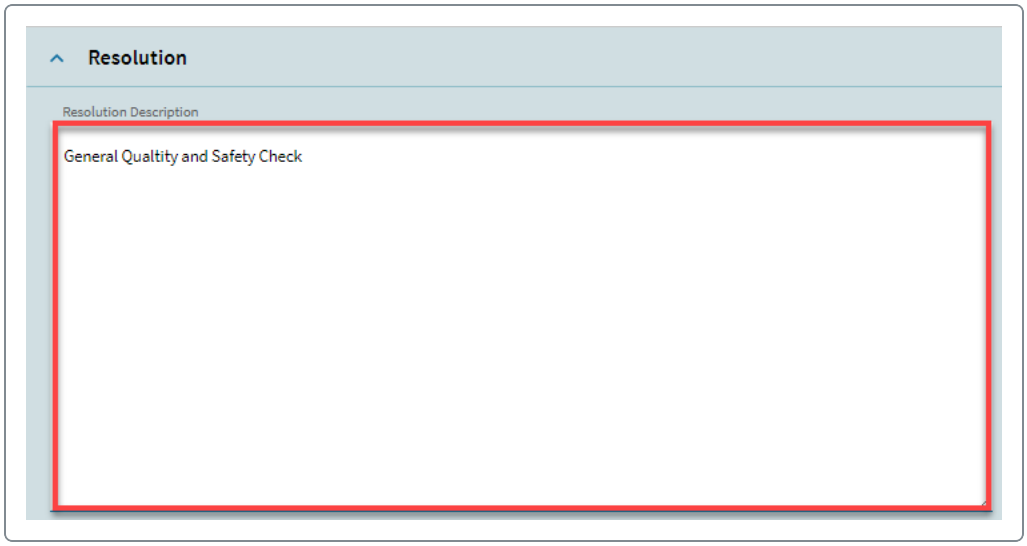


6. Next, select topic related to the issue.

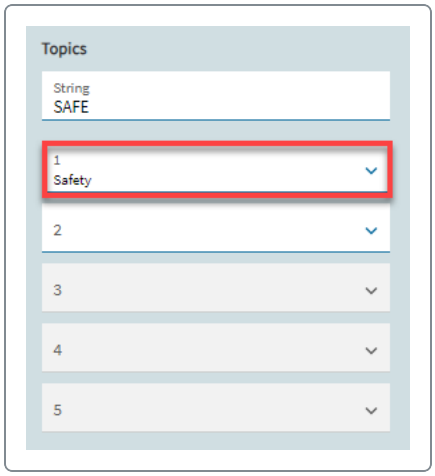


In this case, we selected 'ELEC SHOCK'. However, this is just an example.

7. Scroll further down to locate and expand the **Resolution** card.
8. Enter the **Resolution Description** that is related to the job.

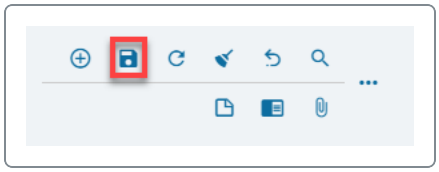


9. Next, select the topics.



In this case, we selected a single topic called 'Safety'.

10. Select **Save**.



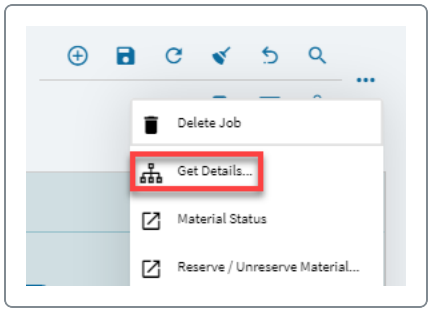
Getting Job Details

You can quickly copy job details from another maintenance job with the **Get Details** function. You can get details for the entire job, as well as for individual assemblies.

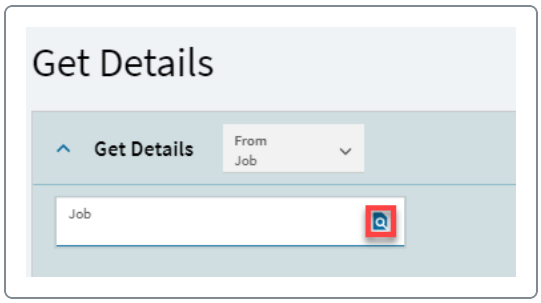
Only maintenance jobs that have their **Template** check boxes selected display in **Get Details**.

1. From the **Overflow** menu , select **Get Details**.

   The **Get Details** panel opens.



2. In the panel, search for and select a job.



3. In the panel, select **OK**.

   The **Get Details** panel opens.

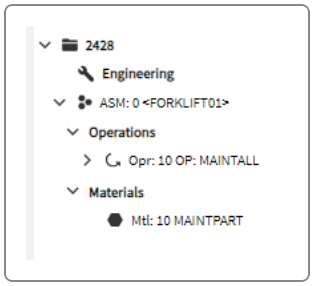
4. Agree or disagree if the app asks you whether you want to re-sequence the assembly numbers, and select **OK**.

   After the app has pulled the details to your maintenance job, you need to call **Get Details** once again. You can now see the **Append Details** status indicator in the **Get Details** panel. Enter your changes through the grids.

Adding Operation

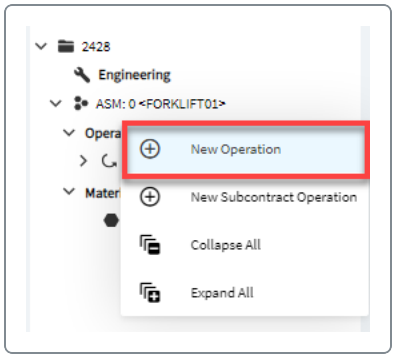
Next, learn how to add an operation.

1. Once you execute **Get Details**, go to the Nav tree.



'Operations' and 'Materials' were pulled in.

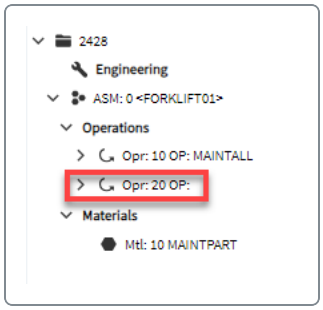
2. To add a new operation, in the Nav tree, right-click the **Operations** node and select **New Operation**.



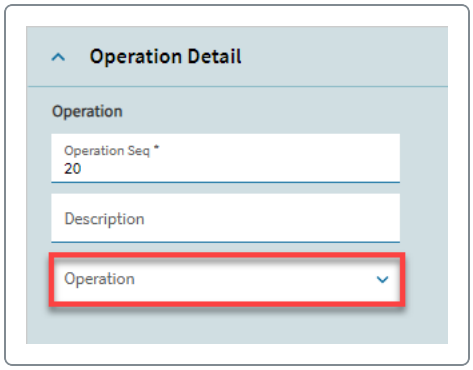
Kinetic generates a new 'Operation' sequence.

3. In the Nav tree, select the newly generated sequence.

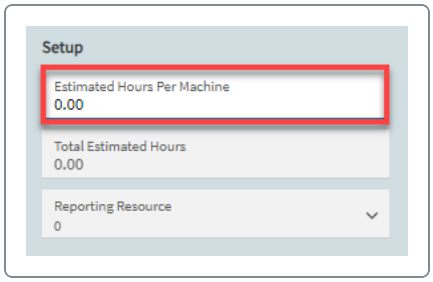
   The **Operation Detail** card displays.



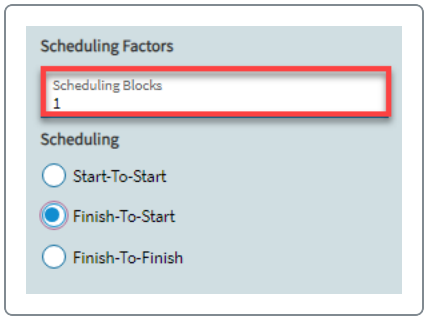
4. Select an operation you want to add.



5. Enter the **Estimated Hours per Machine** it will take to perform this operation.



6. Specify **Scheduling Factors**.



Specifies the number of resources a single job operation requires. This is normally '1'. Do not enter more than '1' unless you typically set up more than '1' resource for the same operation on the same job.

Define the relationship between this operation and the preceding one. This helps you schedule the operations, as it defines the relationship each operation has with the other operations.

- **Start-to-Start** - Kinetic schedules one operation to start as soon as the previous operation begins.

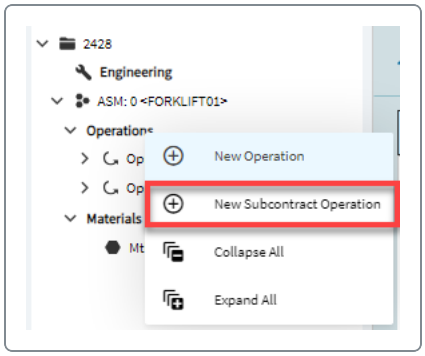
- **Finish-to-Finish** - Kinetic schedules one operation to finish at the same time that a previous operation finishes.
- **Finish-to-Start** - Kinetic schedules one operation to begin as soon as the previous operation ends.

7. Select **Save**.

Adding Subcontract Operation

Next, learn how to add a subcontract operation.

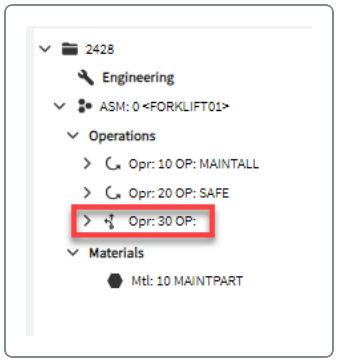
1. To add a new subcontract operation, in the Nav tree, right-click the **Operations** node and select **New Subcontract Operation**.



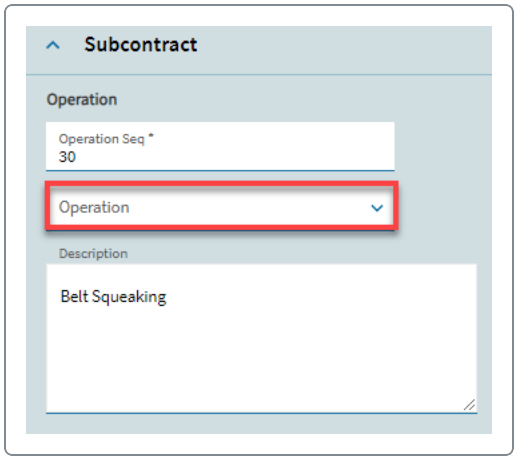
Kinetic generates a new 'Operation' sequence.

2. In the Nav tree, select the newly generated sequence.

   The **Subcontract** card displays.



3. In the **Operation** field, select the subcontract operation you want to add.



4. Enter additional details to the subcontract operation.

    - **Supplier ID** - Identifies the Supplier performing this subcontract operation.
    - **Purchase Point** - Specifies the supplier location that will perform the subcontract operation.
    - **Days Out** - Specifies the estimated number of calendar days that the parts will be out of your manufacturing center.
    - **Inspection Required** - Indicates that the parts created or modified from this subcontract operation are subject to inspection before you can receive them back into your shop.
    - **RFQ Needed** - Indicates that you need an RFQ from the supplier. You can specify the number of **Quotes Required**.

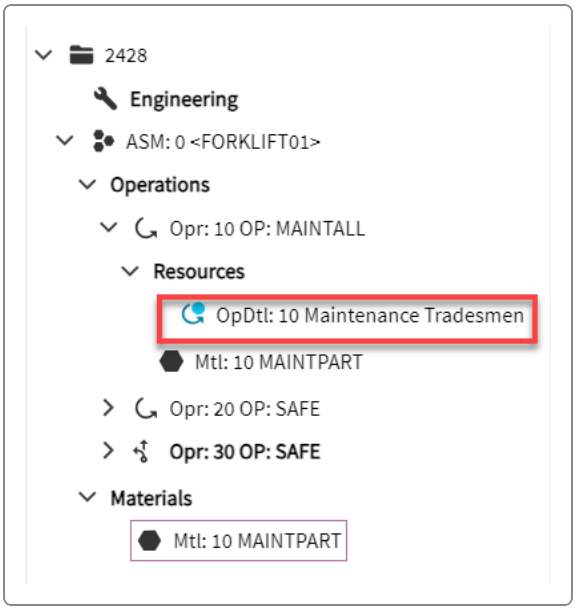
5. Select **Save**.

Assigning Resource

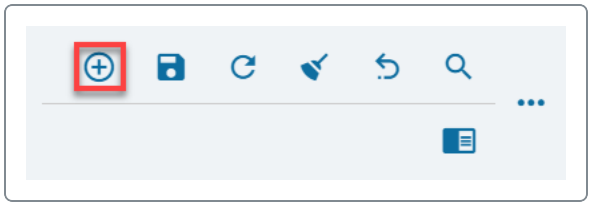
Next, learn how to add a new resource.

1. In the Nav tree, click a resource under the **Resources** node.

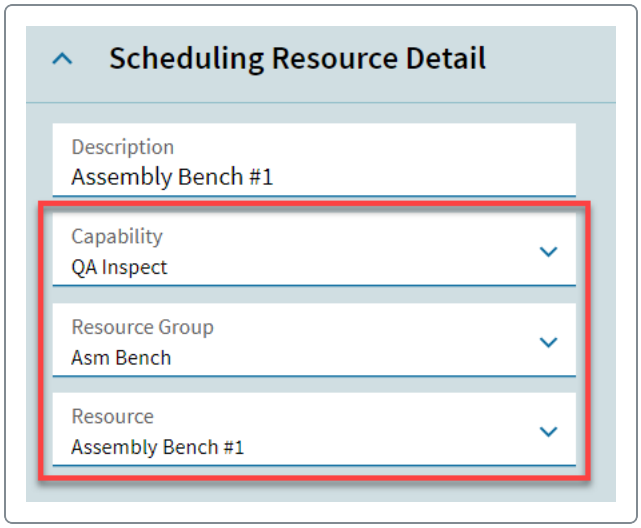
    The **Scheduling Resource Detail** card displays.



2. To add a new resource, select **New Scheduling Resource**.

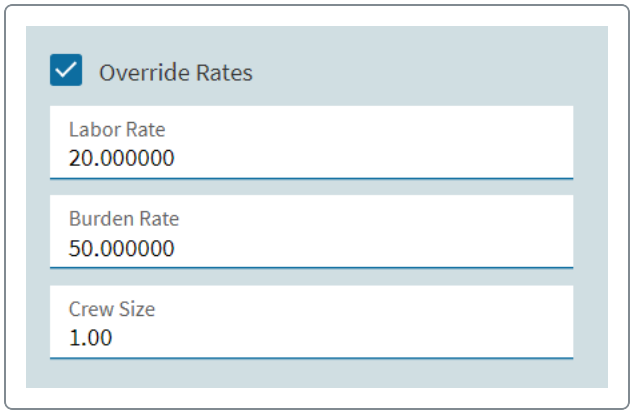


3. Select **Capability**, **Resource Group**, and **Resource**.



4. Specify the **Crew Size** and **Rates**.

- **Labor Rate** - The rate per hour at which you allocate labor expenses to the operation's setup.
- **Burden Rate** - The rate per hour at which you allocate your overhead expenses to the operation's setup.
- **Crew Size** - The average number of operators for this scheduling resource that will work on an operation simultaneously. The app uses this number as a multiplier to calculate the estimated setup labor hours.
- **Override Rates** -Indicates that you have overridden the rates that were on the record when it was initially created.



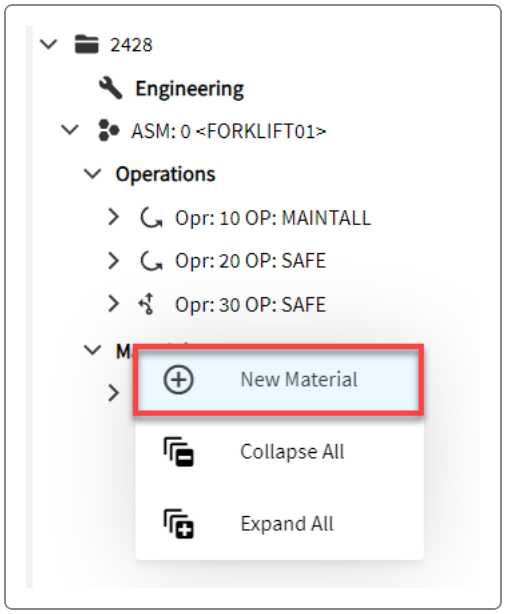
5. Select **Save**.

Adding Material

Next, learn how to add a material.

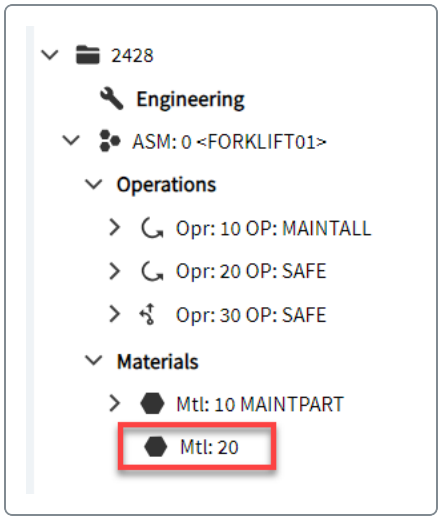
1. In the Nav tree, right-click the **Materials** node and select **New Material**.

   Kinetic generates a new material sequence.

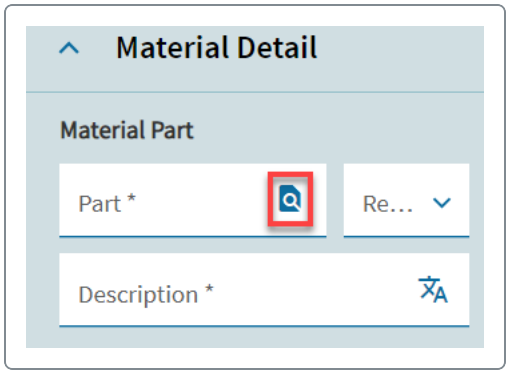


2. In the Nav tree, click the new material sequence.

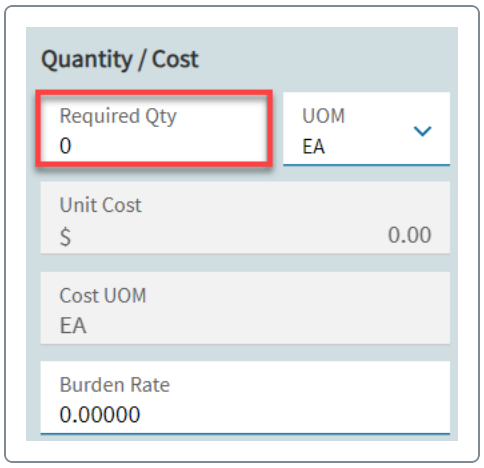
   The **Material Detail** card displays.



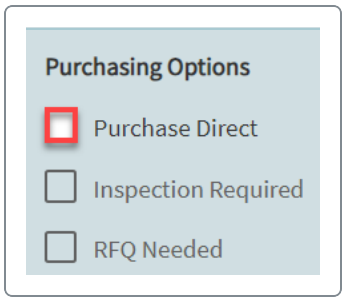
3. Next, search for and select the material you want to add.



4. Specify the **Required Quantity**.

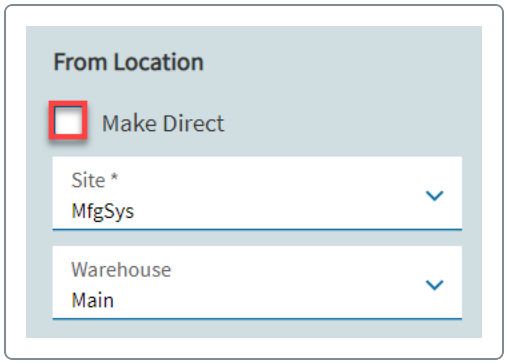


5. If you want to purchase the material specifically for this maintenance job operation, select the **Purchase Direct** check box.

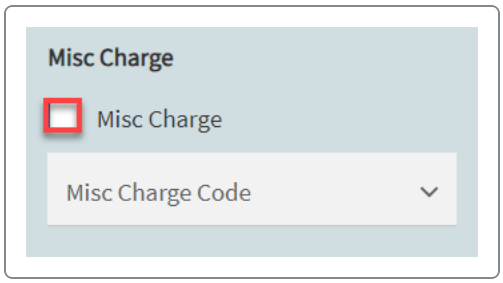


If you select this check box, then the 'Inspection Required' and 'RFQ Needed' check boxes activate.

6. Select the **Make Direct** check box if you want to get these material parts from another job. You don't normally store such parts in inventory.



7. Select the **Misc Charge** check box if this material will be a miscellaneous charge.

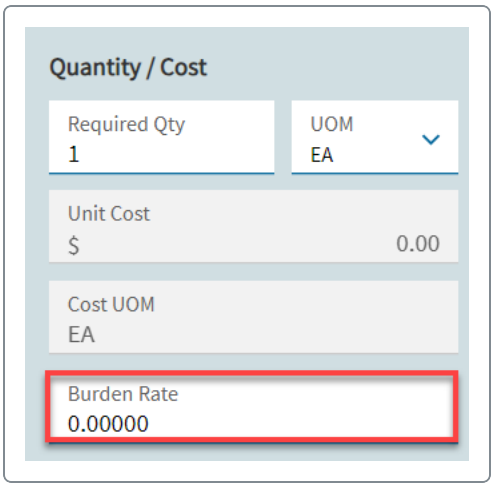


Miscellaneous charges are additional costs which you need to include on sales orders, quotes, and invoices.

8. Next, select the reason in the **Misc Charge Code** field.

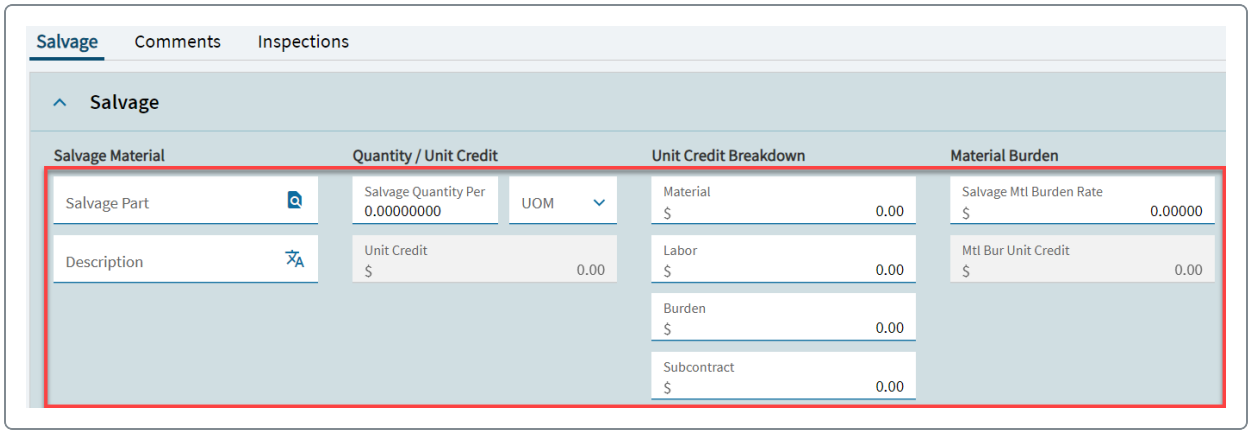
This field only activates in you select the 'Misc Charge' check box.

9. Define a **Burden Rate**.



10. Select **Save**.

11. To add material salvage related information, scroll down to the **Salvage** card and enter the material salvage values.



This information lets you create credit back to the job, and determines how much of the planned scrap quantity you can recover to use again on a different job.

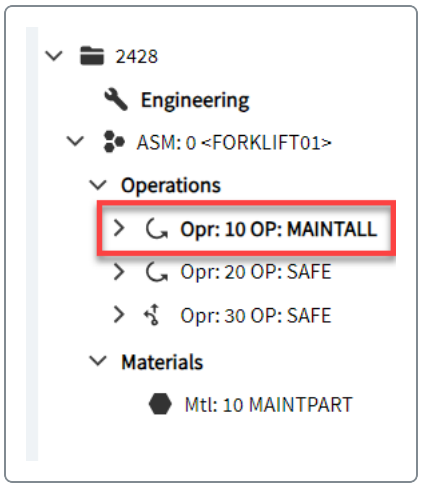
12. Select **Save**.

Assigning Inspection Plan to Operation and Material

You can add inspection plans to operations and materials.

1. In the Nav tree, select the operation you want to add an inspection plan to.

   The **Operation Detail** card displays.

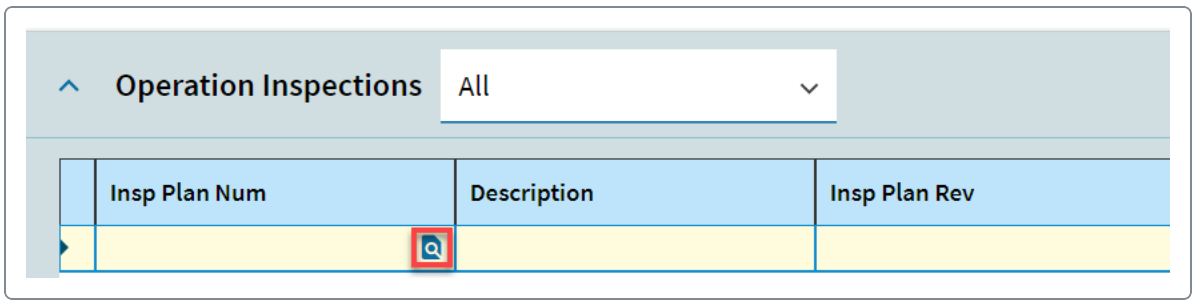


2. Next, select **Inspections**.

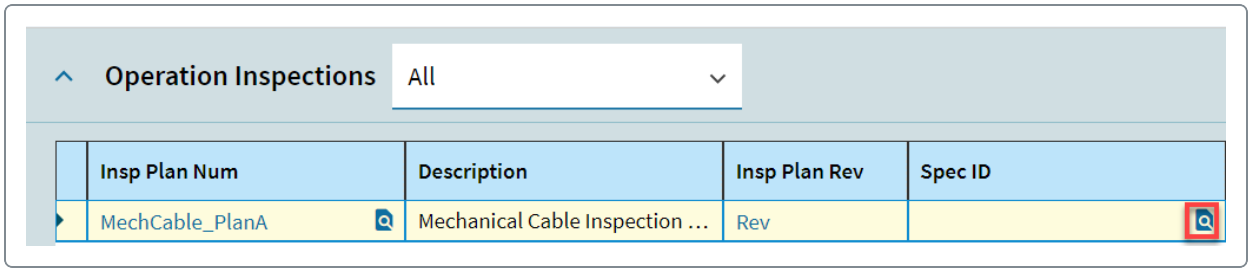
   The **Operation Inspections** card displays.

3. Select **New Inspection**.

4. Search for and select the required **Inspection Plan Number**.



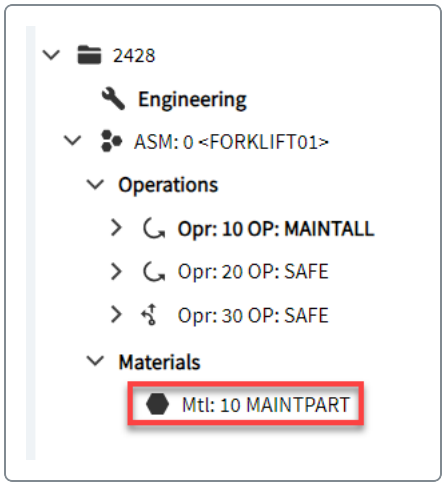
5. Search for and select the required **Specification ID**.



6. Select **Save**.

7. In the Nav tree, select your material under the **Materials** node.

   The **Material Detail** card displays.

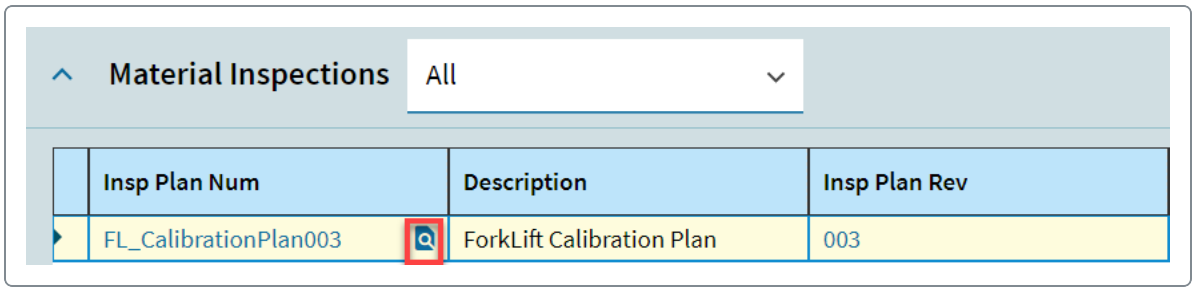


8. Select **Inspections**.

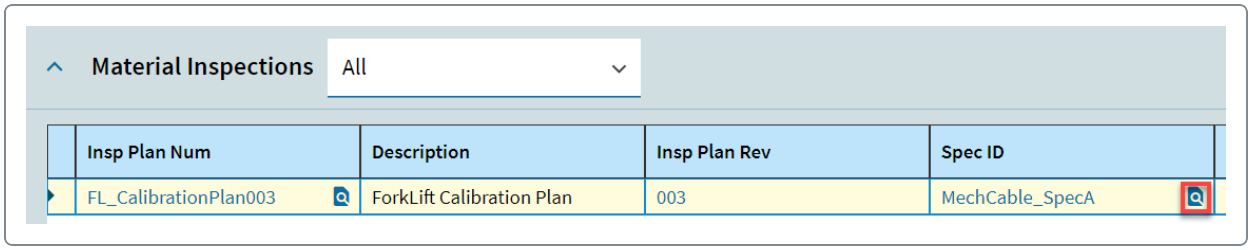
   The **Material Inspections** card displays.

9. Select **New Inspection**.

10. Search for and select the required **Inspection Plan Number**.



11. Search for and select the required **Specification ID**.



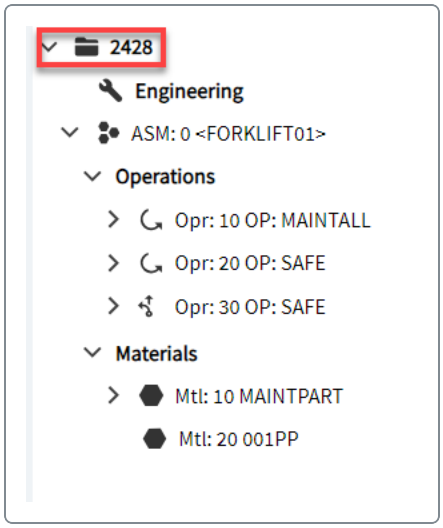
12. Select **Save**.

Engineering Maintenance Job

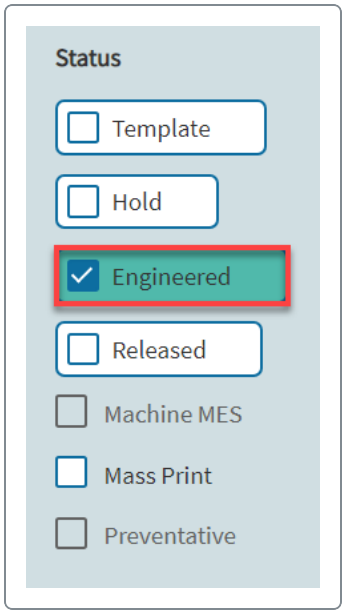
Next, engineer your job.

1. In the Nav tree, select the job number node.

   The **Job Detail** card displays.



2. Select the **Engineered** check box.



3. Select **Save**.

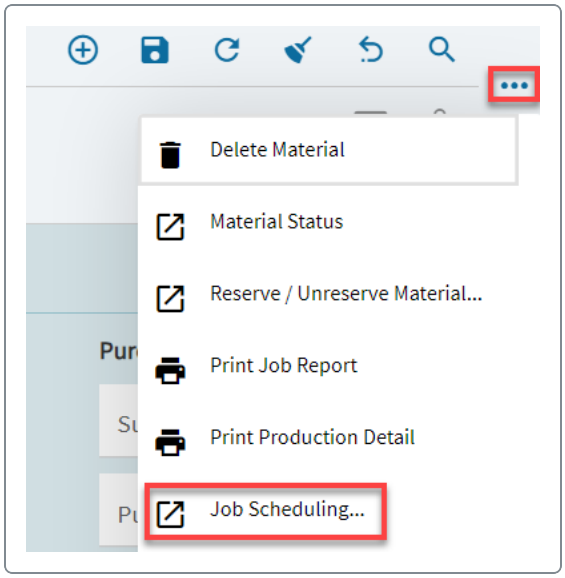
Scheduling Maintenance Job

You can schedule the maintenance job **Forward** or **Backwards**.

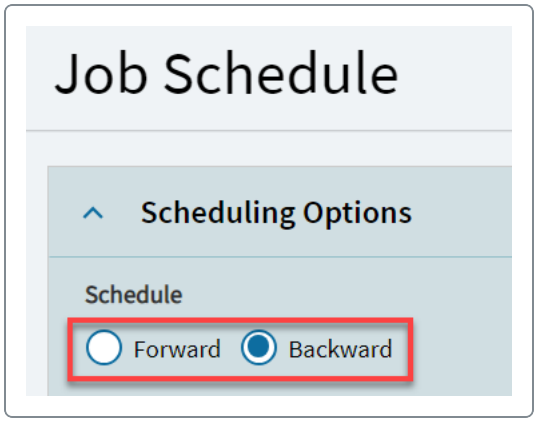
- 'Forward Scheduling' is logic used by the scheduling engine to calculate the length of time it will take to complete a job. This logic begins with the 'Start Date' on the job and then moves forward through the 'Production Calendar' used at the resource, resource group, site, or company, and uses the lengths of time required on each operation (Operation Time) - taking into account any operations that can run concurrently (peer assemblies) - to arrive at the 'End Date'.
- 'Backward Scheduling' is a type of logic used by the scheduling engine to calculate the length of time it will take to complete a job. This logic begins with the 'End Date' on the job and then moves backward through the 'Production Calendar' used at the resource, resource group, site, or company, and uses the lengths of time required on each operation (Operation Time) - taking into account any operations that can run concurrently (peer assemblies) - to arrive at the 'Start Date'.

1. From the **Overflow** menu , select **Job Scheduling**.

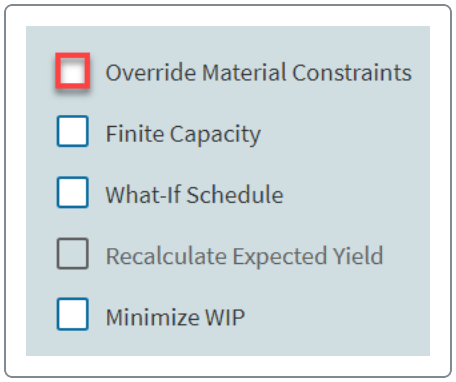
   The **Job Schedule** panel opens.



2. Select the **Forward** or **Backward** schedule.



3. Select the **Override Material Constraints** check box to indicate you will ignore material constraints defined for parts used on the current job.



When a material is constrained, the scheduling functionality determines when this material is available for an operation. It then uses this date as the operation's 'Start Date'. However, in some cases, you may wish to ignore these material constraints.

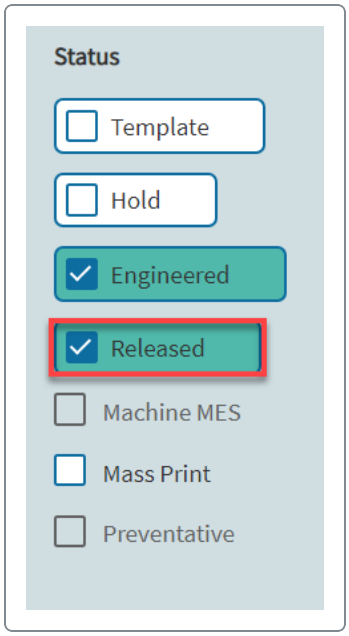
4. To schedule this job using capacity limits defined for each finite resource, select the **Finite Capacity** check box.
5. Select the **What-If Schedule** check box to test a job's schedule by first creating a temporary schedule and then reviewing its impact on the overall schedule.
6. Select the **Recalculate Expected Yield** check box to indicate you want the application to handle over-production or under-production for this job.
7. Select the **Minimize WIP** check box to reduce the gaps between operations on a single job or a group of associated jobs that you scheduled via the **Schedule Multi-Job feature**.
8. Select the **Schedule Multi-Job** check box to determine whether the app will schedule the jobs that have direct links to the current job.

9. In the panel, select **OK** to confirm.

Releasing Maintenance Job

Finally, release your job.

1. On the **Job Detail** card, select the **Released** check box.



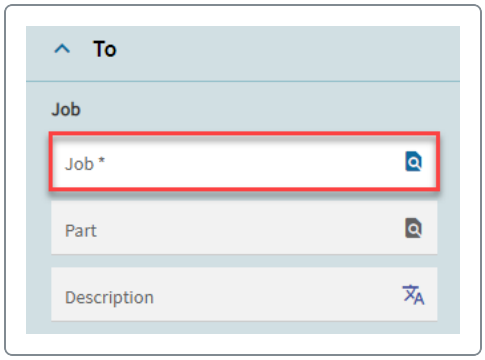
2. Select **Save**.

3. Exit the Maintenance Job app.

Issuing Material from Inventory to Jobs

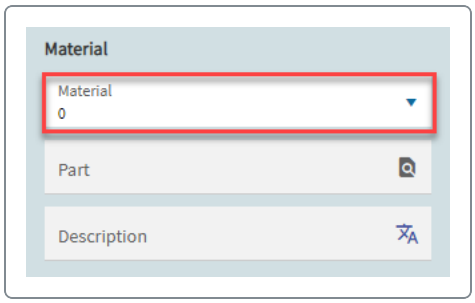
You issue materials to a job to satisfy the material demand the job may have. You can issue both the 'purchased' and 'manufactured' items, depending on what a job needs. For example, assume job '1234' needs two materials ('Material A' and 'Material B'). You cannot start production unless you issue the materials needed on the job. As a result, you issue the materials to job '1234' and then start producing the assembly items. In summary, you cannot make something out of nothing.

1. On the To card, enter a job number in the Job field, and press **Tab**.

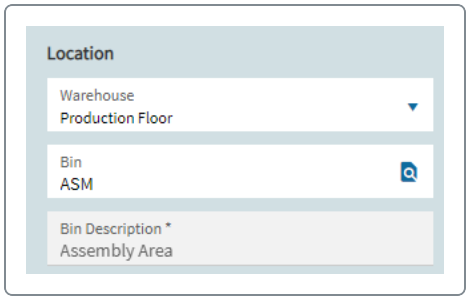


   Alternatively, select the 'Search' button inside the field.

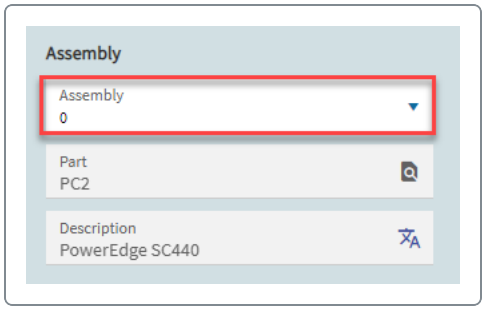
2. In the Material group box, select the material you want to issue in the Material field.



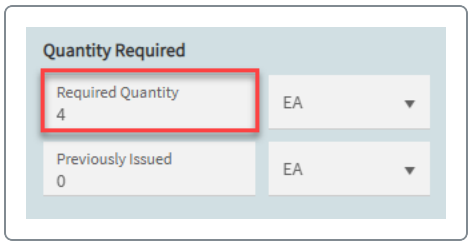
   The Location group box populates with the warehouse and warehouse bin values indicating where you are issuing the material to.



3. If your jobs is a multi-assembly job, in the Assembly group box, select a job assembly in the Assembly field.



4. Review the required material quantity using the Required Quantity value.

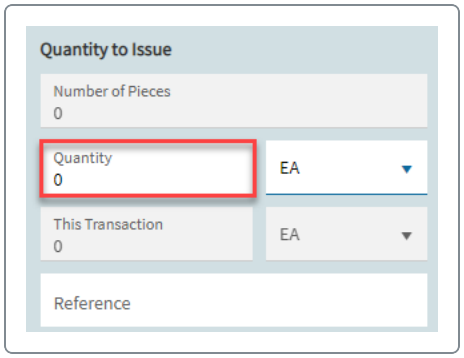


This value is based on the 'Quantity/Parent' setting defined in the 'Engineering Workbench' or 'Job Entry' apps, depending on where the job was entered.

For example, the job is for '10' units of 'Part A' and the 'Quantity/Parent' value for its 'Material A' is '2'. It this case, the 'Required Quantity' value would be '20', since you need '20' pieces of 'Material A' to make '10' pieces of 'Part A'. You define the 'Quantity/Parent' setting at the time you create a method of manufacture.

5. Scroll down to locate the **From** card.

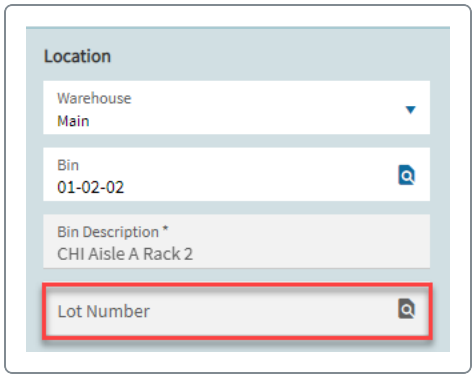
6. In the Quantity to Issue group enter the required material quantity in the Quantity field and press **Tab**.



If you enter the full required amount then Kinetic selects the 'Issue Complete' check box. If you over issue, meaning you issue more material than the job requires, you can return the over issued material using the 'Return Material' app.

The 'Location' group box populates with the warehouse and warehouse bin values indicating where you are issuing the materials from (inventory location).

7. If the issued material is a lot tracker part then select a lot number in the Lot Number field located in the Location group box.



8. To review the jobs the material you are issuing has been recently issued to, select **Recently Issues**.

The Recent Issues card displays. The card displays a list of jobs together with the location and previously issued material quantity.

9. Select **Save**.
10. Exit the Issue Material app.

Entering Time

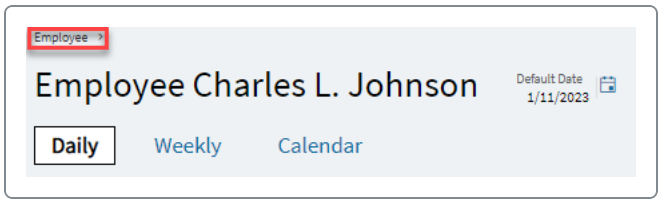
Enter employee hours for indirect labor, production labor, or project labor and submit those hours for approval.

Entering Time

You can enter time on a daily or weekly basis. After time transactions are entered, you can view, modify, recall, and copy them. You can also monitor the status of entered transactions and enter comments for approvers.

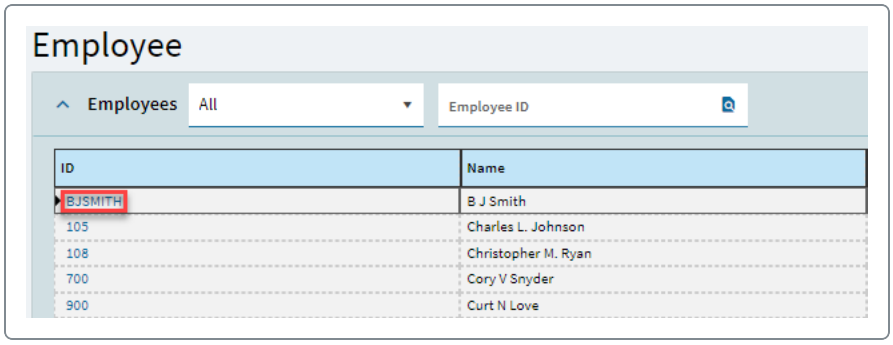
1. Open the **Time Entry** app.
2. To find and select the employee for whom you want to enter expenses, select **Employee**.

   The Employee landing page displays.

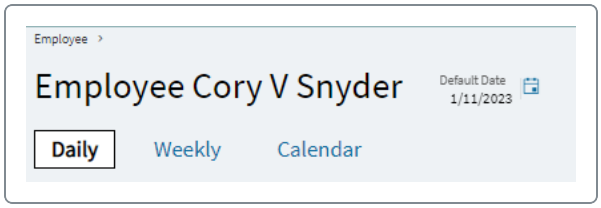


> In this example, we are signed in as Cherles L. Johnson, but want to change it to a different employee.

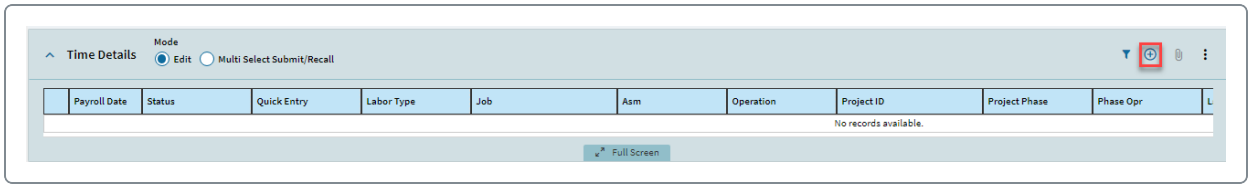
3. Inside the grid, select an employee you want to enter time for by selecting the ID link located in each grid line.



   You can now report time based on your selected employee. In this example, we selected Cory V Snyder.

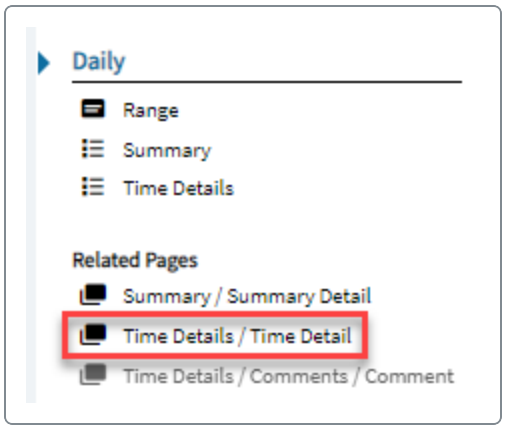


4. Scroll down to locate the Time Details card and select **New Time Detail**.

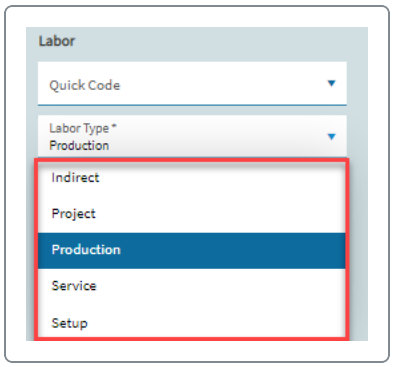


5. In the Nav tree, select the **Time Detail** node.

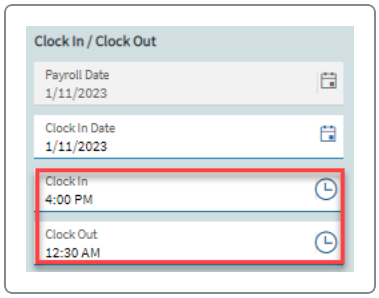
   The Detail card displays.



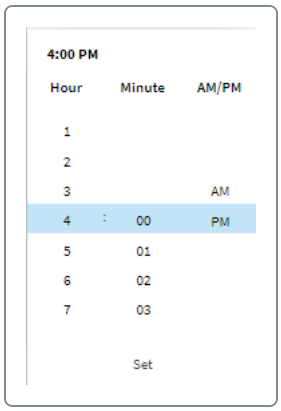
6. From the **Labor Type** drop-down list, select the type of labor performed. The labor type determines which fields are available for entry in the card, and default values populate some of the fields.



7. In the Clock In/Clock Out group box, define the time the employee performed the labor.

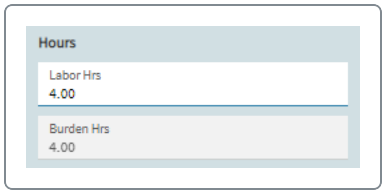


When you select the 'Clock' icon in the 'Clock In' and 'Clock Out' fields, Kinetic displays the 'Time' box, where you can select the time you clocked in or clocked out.



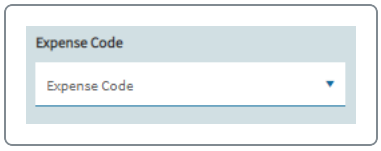
To select your time, scroll up and down in the 'Hour', 'Minute', and 'AM/PM' columns. Once you are happy with your time selection, select **Set** inside the 'Time Box'.

Based on your time selection, the 'Labor' and 'Burden Hours' fields display a time value.

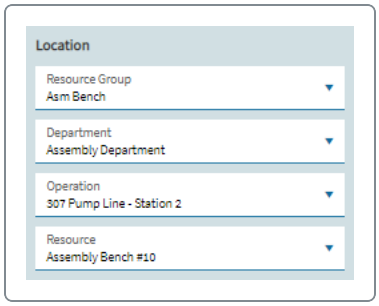


In this example, we selected the 'Clock In' time of '4:00 PM' and 'Clock Out' time of '8:30 PM'. Therefore, the fields show '4' hours.

8. Select one of the existing expense codes for the labor performed.



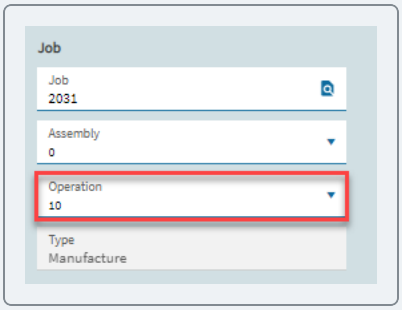
9. In the **Location** section, complete the fields as needed to define the default resource group, department information, and resource for this time transaction.



The fields located in the 'Location' group box activate depending on the value you select in the 'Labor Type' field. I this example, we selected 'Production' and are reporting labor again a job.

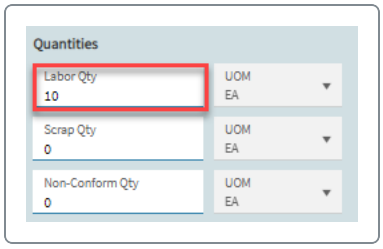
The values will default if you select the 'Operation' sequence. This is if you are reporting time against a job operation (Production).

The 'Operation' field identifies the sequence of the operation record within the specific Job/Assembly to which this labor transaction applies. For setup and production entries, this must be valid and must not be a subcontract operation.



10. Enter the total reported production quantity using the Labor Qty field.

Users can enter quantity in this field except for the last operation of a job with co-parts.



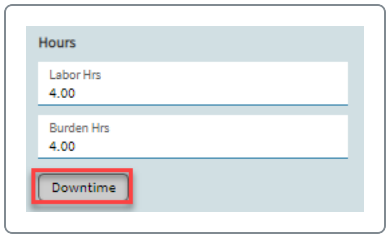
You can also enter the 'Scrap' and 'Non-Conformance' quantity. The 'Scrap' quantity is the quantity you dispose of during production. The 'Non-Conformance' is the discrepant quantity

that you decide to report because there is something wrong with the produced products. Non-Conformance quantity will need to go through inspection to determine whether the quantity can be scrapped, reworked, or can be accepted as is.

11. Select the **Downtime** button to report downtime against a job, with a reason why production stopped, for example: electricity outage, waiting for materials, and so on.

    Downtime is used when the resource is in production and something interrupts that production and the resource is down requiring immediate attention. This is different from indirect codes which are used to track non-production time for a variety of reasons.

    For example, you start production activity on job '1111' but the machine runs out of material and you are waiting for material to continue. Instead of clocking out of the job, you report downtime by selecting an appropriate indirect code. When the downtime button is selected in MES the program suspends time to any job(s) the employee is currently clocked into and starts accruing time to the selected downtime code. When whatever condition that caused the downtime is resolved the employee ends downtime and time again will start to accrue to the job(s).



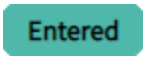
12. Select other fields as necessary.

    - **Project ID** - The project you are reporting time against.
    - **Project Phase** - The project phase belonging to the project you are reporting the time against.
    - **Expense Code** - The expense code associated with the labor transaction.
    - **Capability** - Specifies a capability. A capability is a skill or ability that a resource can possess. For example, a machine resource can have a Shear capability or a human resource can have an Engineer capability. Other typical capabilities include Turn, Set, Paint, Drill, and so on. Capabilities support the concept of manufacturing cells, collections of resources that act as independent production units within your manufacturing center. When you link resources together through a capability, the scheduling engine can schedule operations using these different cells.
    - **Setup % Complete** - Percentage of the completed operation setup.
    - **User Rate** - The labor rate that overrides the system defined labor rate.

- **Payroll** - The payroll hours of the employee that is reporting the time.
- **Call** - The service call associated with the service record.
- **Rework Reason** - The reason code used to describe the rework reason. This code links the transaction to the reason master record.
- **Scrap Reason** - The reason code used to describe the scrap quantity reason. This code indicates why the scrap occurred for analysis purposes.
- **Discrepant Reason** - The reason code used to describe the discrepant quantity reason. This code indicates the reason for the non-conformance.
- **Attribute Set** - Attribute sets allow you to you to use different dimensions (attribute sets) for the same part and then reuse those attribute sets depending on the dimension you want to quote, order, purchase, manufacture, ship, receive, transfer, quantity adjust, and so on.

  To learn about attribute sets, review the Understanding Attribute Sets article.

Select **Save**. 

The transaction is saved with a status of 

until you submit it for approval. You can change the time entry until you submit it.

Use the **Co-Parts** card to enter labor against a job producing multiple parts. Available if the Advanced Production module is installed, use the grid on this card to enter the quantities produced for the various parts manufactured on the current job.

You can enter Co-Parts (multiple parts) manufactured through the current job. For example, a manufacturer makes upholstered office chairs. They manufacture several different sized chair backs which use the same fabric. In this scenario, you can enter a single job that creates two different parts on one job operation (stamping the material into two different sizes).

For more information about co-parts, review the Entering Co-Parts in Job Entry article.

Use the **Labor Equipment** card to enter meter readings for equipment when entering time for a job associated with the equipment.

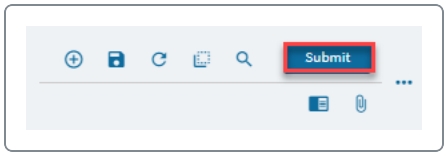
This card is available when a resource is associated with the equipment used for the job, and the equipment requires the tracking of meter readings for maintenance.

After you enter time against a job in the Daily Time > Details card, you can use the Labor Equipment card and enter meter readings for the equipment. Default values may populate the fields depending on the setup of the equipment in Equipment Maintenance.

Submitting Time

After you enter and save a time transaction, you submit it for approval. If a previously submitted transaction was rejected by approvers, you can change it and re-submit it for approval.

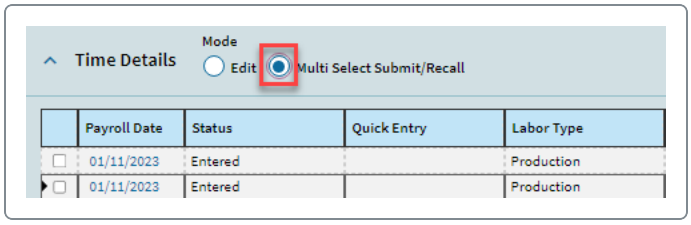
1. If you want to submit an individual time right after you enter it, select **Submit**.



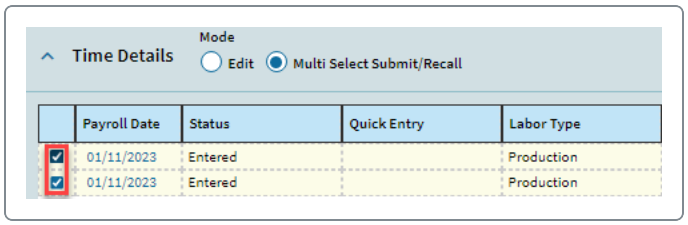
2. If you need to see all the time transaction you want to submit, select the **Time Details** node in the Nav tree.

   The Time Details card displays.

3. In the **Time Details** card, switch to the **Multi Select Submit/Recall** mode.

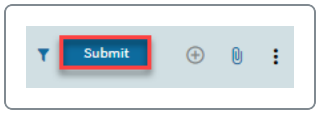


4. Select the time transaction you want to submit by selecting the check box on each expense line.



This example uses an example of '2' time transactions.

5. Select **Submit**.



Transaction(s) are now submitted. The transaction is submitted for approval and the status is set to Approved. You can review the approval details in the **Approvals** card.

Recalling Time

You can recall a time transaction if you unintentionally submitted it for approval.

> You can also recall a previously approved or rejected time transaction if the **Capture WIP** has not been executed.

1. In the **Time Details** card, switch to the **Multi Select Submit/Recall** mode.
2. Select the time transaction you want to recall.
3. Select the **Recall** button.

   The transaction is recalled and the status changes to Entered.

Retrieving Time Records

By default, all transactions of all statuses display in the **Time Details** card. To exclude a transaction of a specific status from displaying, use the **Retrieve Options** action available in the Overflow menu.

Status filter options include the following:

- **Retrieve Approved Records** - retrieves transactions with a status of Approved
- **Retrieve Partially Approved Records** - retrieves transactions with a status of Partially Approved
- **Retrieve Entered Records** - retrieves transactions with a status of Entered
- **Retrieve Reject Records** - retrieves transactions with a status of Rejected
- **Retrieve Submitted Records** - retrieves transactions with a status of Submitted
- **Retrieve Records By** - retrieves transactions by day, week, or month.

Calendar View

The **Calendar** page displays your time entries for review by 'day', 'week', or 'month'. You can also use the Calendar to enter time.

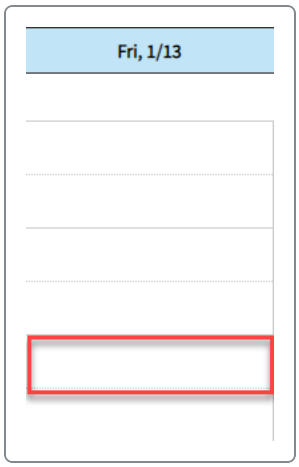
The date and day of the week is shown at the top of the page and the time of day displays down the left margin, just like a desk calendar or a day timer book. Any time that has been entered, submitted, rejected, or approved for this day will show in color-coded blocks.

1. Select the **Calendar** page.

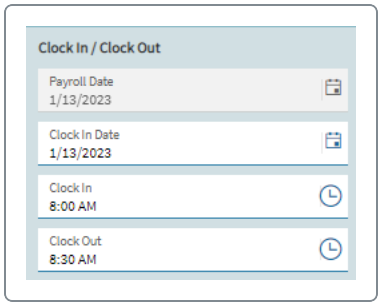
2. Inside the **Calendar** page, review the time transaction based on a particular day, week, or month.

3. To enter time for a particular day, double click inside the calendar on the day you want to enter the time for.

   For example, in this example we double click on date 1/13 and time 8:00 AM.



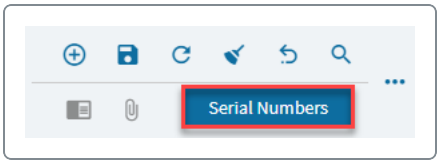
   The **Detail** card displays. The card displays the selected clock in and clock out values. in this case, 8:00 AM through to 8:30 AM.



To complete the transaction, you must define all the values on this card and save and submit it.

Working with Serial Numbers

If the part on your job is a serial number tracked item, then you must provide serial numbers against the reported quantity by using the **Serial Numbers** button.



You can also add serial numbers against the 'Scrap' and 'Non-Conformance' quantity.

Assume we are manufacturing 'Part A'. The part is set to 'Serial Tracking' in the 'Part' app and a job is for '10' pieces. To keep it simple, the job holds a single operation and no material. When we enter time, we report the following quantities:

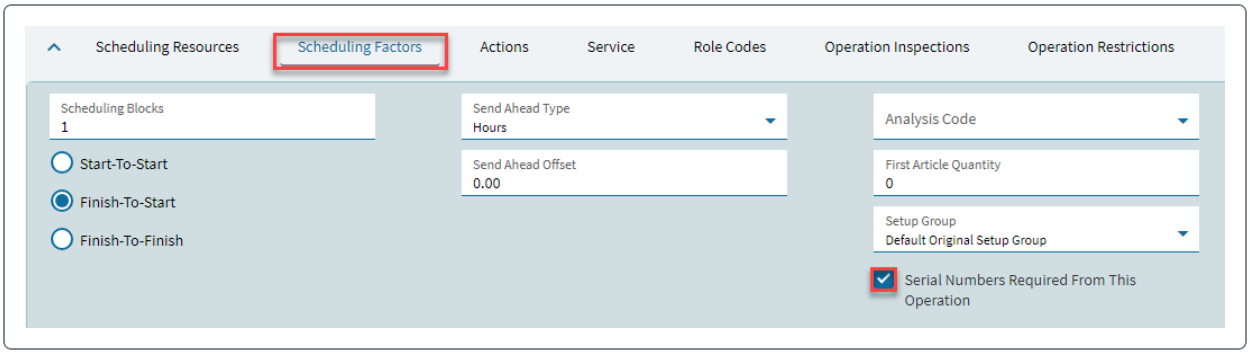
a. Labor Quantity - 6

b. Scrap Quantity - 2

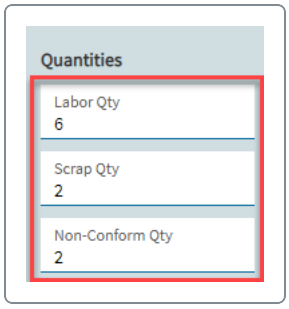
c. Non-Conformance - 2

Next, we assign serial numbers to each reported quantity.

For the 'Serial Numbers' button to display, you must select the 'Serial Numbers Required From This Operation' check box on a job operation when you define a method of manufacture in the 'Job' app. Or, if you use 'Get Details' to pull the method of manufacture into your job. In this case, the method is created in the 'Engineering Workbench' app.

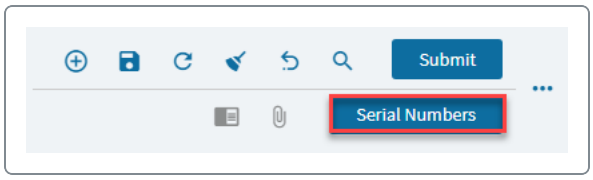


1. We enter time against a job operation as follows:

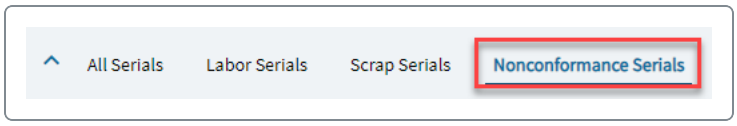


2. Next, we select the **Serial Numbers** button.

   The **Serial Number Selection** panel opens.

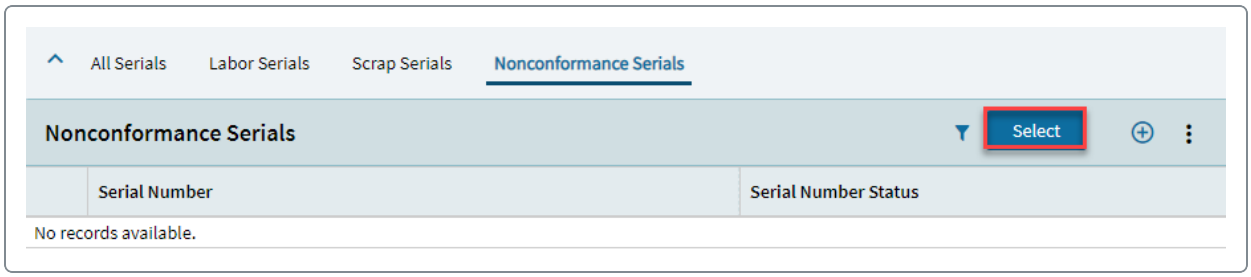


3. Inside the panel, we select the **Nonconformance Serials** tab.

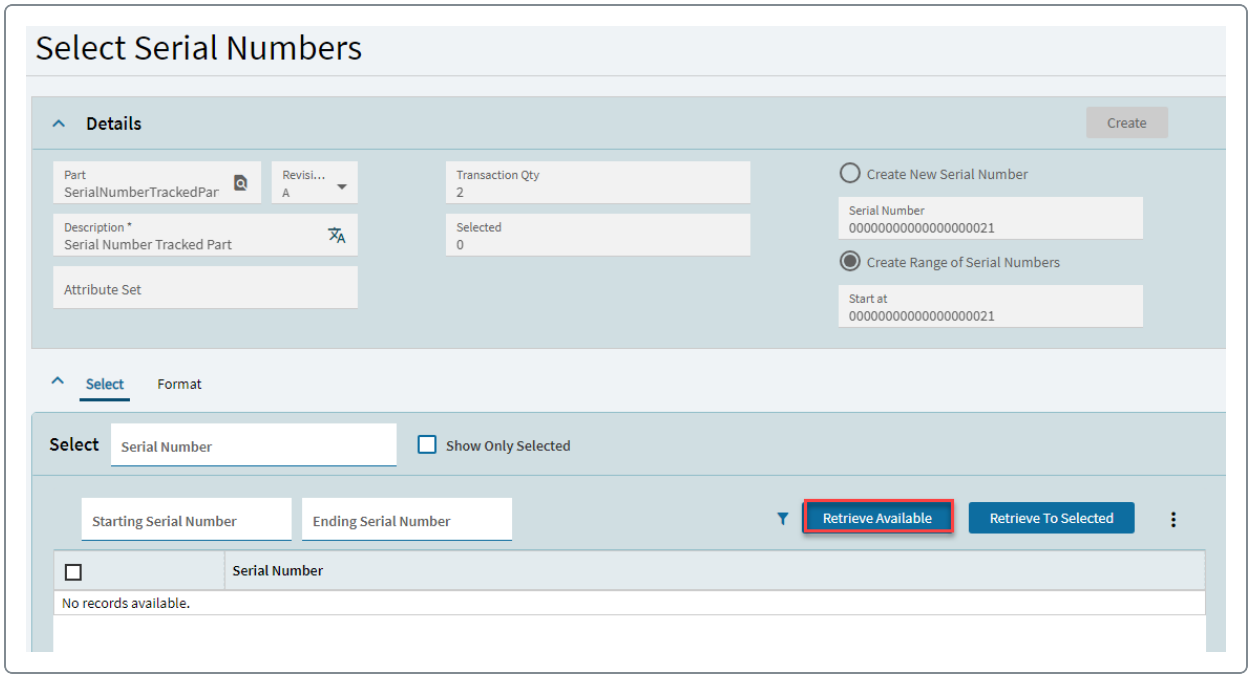


4. Select the **Select** button.

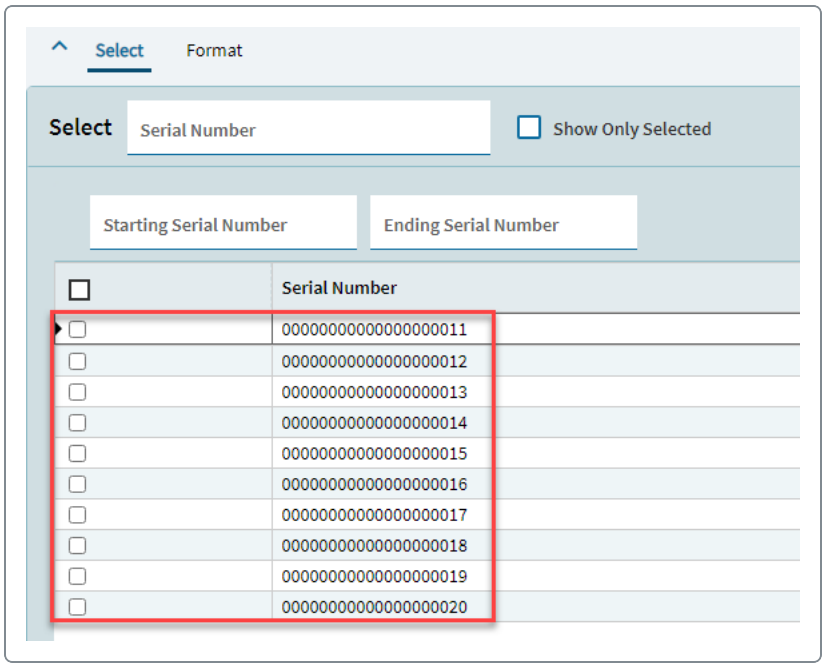
   The **Select Serial Numbers** panel opens.



5. Inside the panel, we select the **Retrieve Available** button.

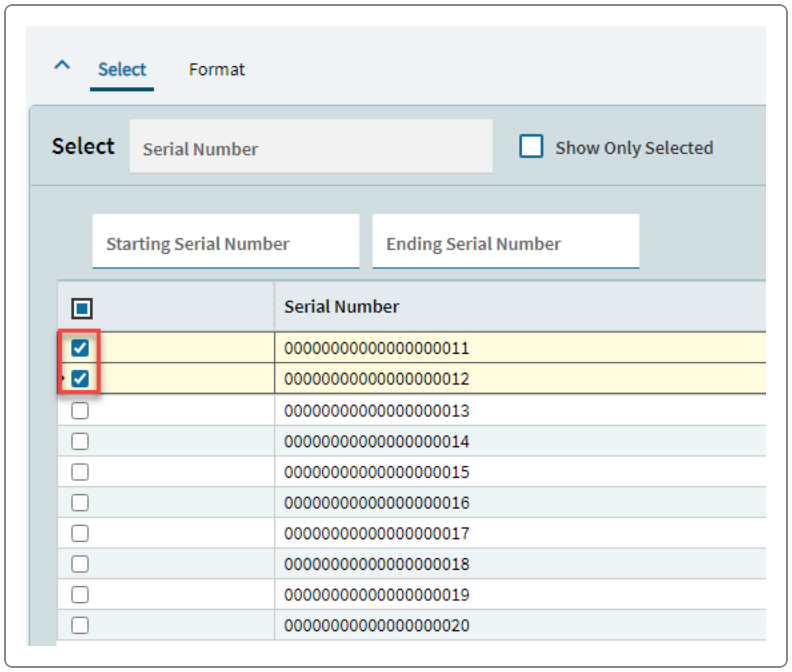


The serial numbers populate.



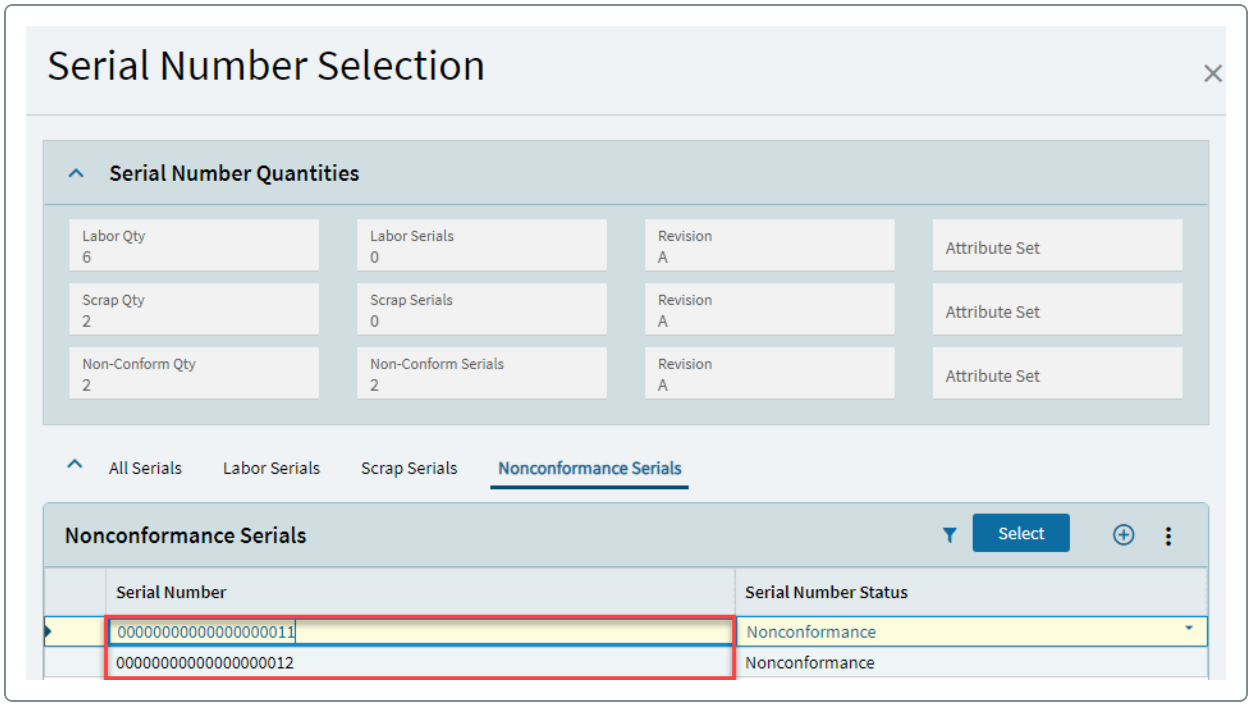
In this case, the app displays '10' serial numbers since the job quantity is for '10' pieces.

6. Next, we select **2** serial numbers. Remember, we reported **2** non-conformance units.

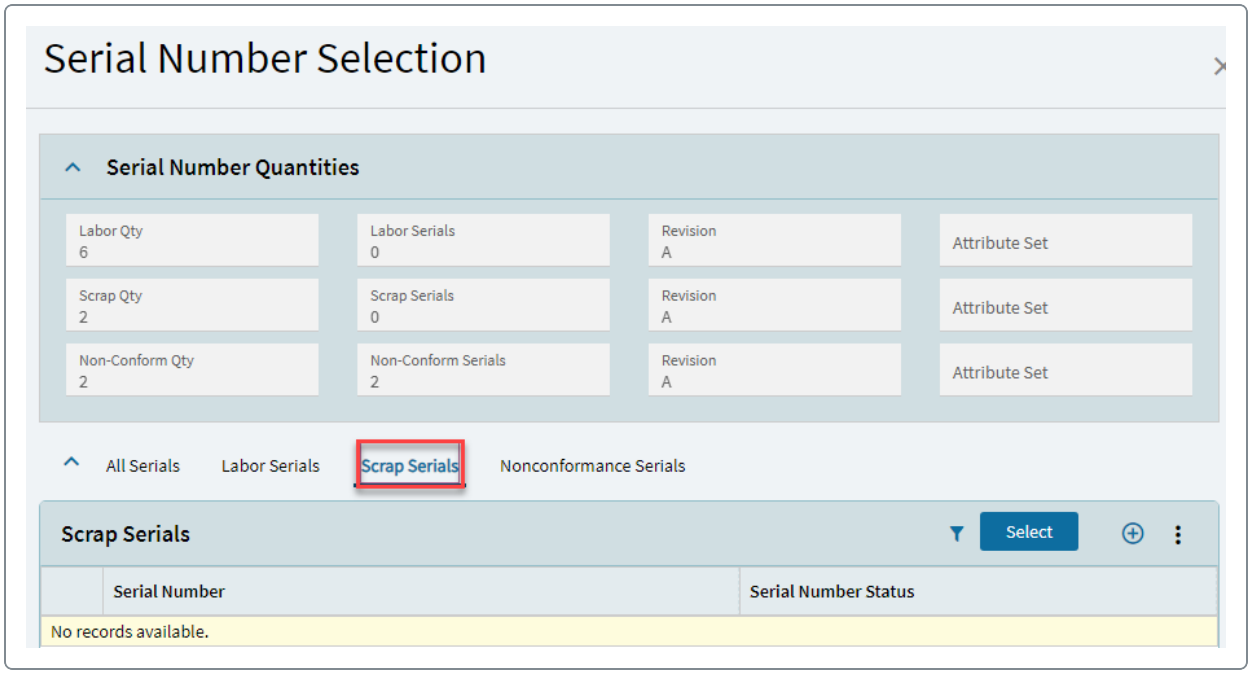


7. Inside the panel, we select **Ok**.

   The selected serial numbers display on the **Nonconformance Serials** card with the **Nonconformance** status.

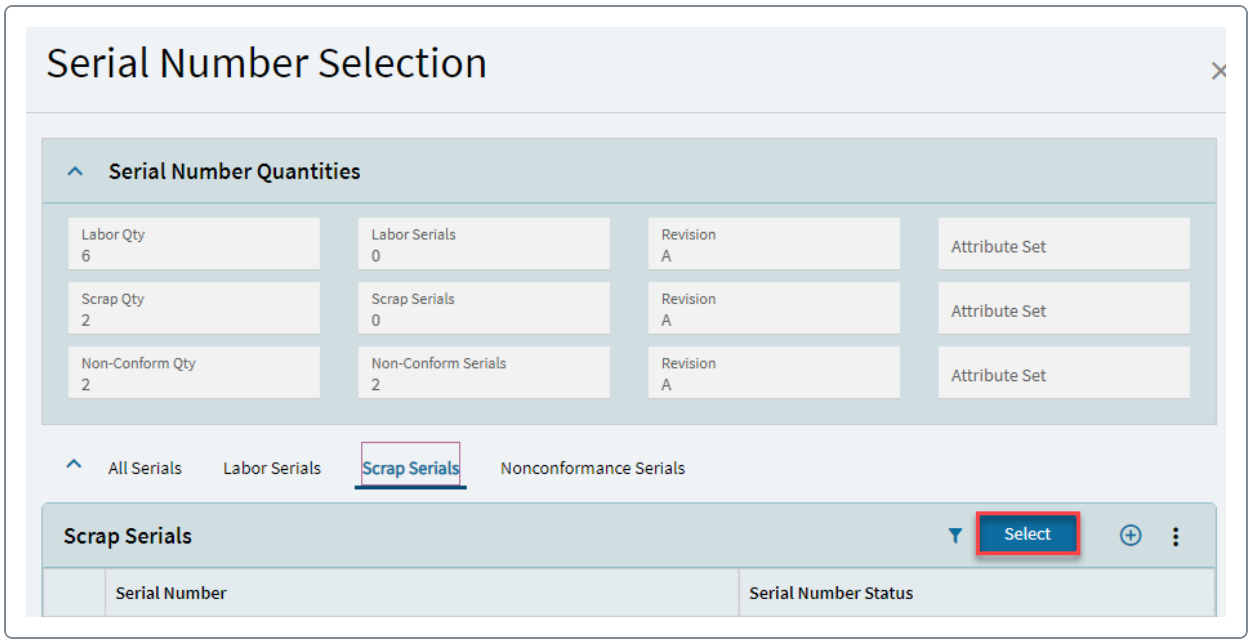


8. Next, we select the **Scrap Serials** tab.



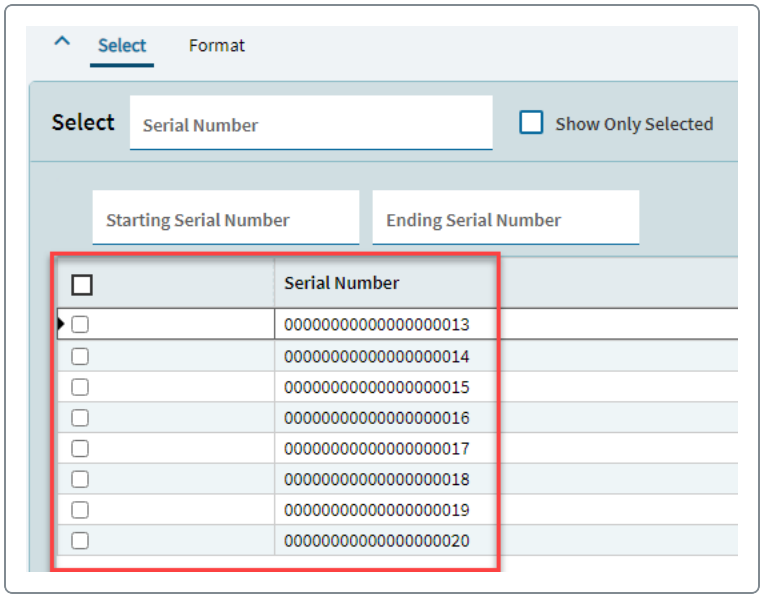
9. Select the **Select** button.

   The **Select Serial Numbers** panel opens.



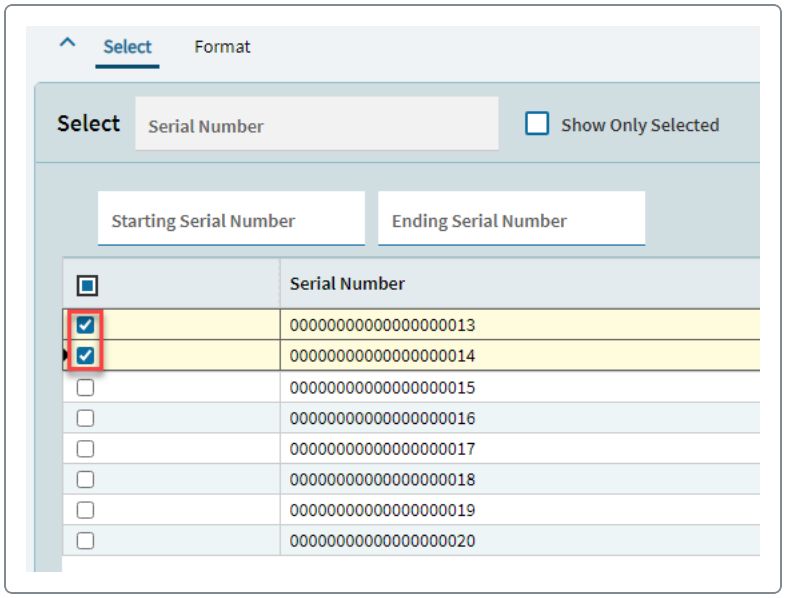
10. Inside the panel, we select the **Retrieve Available** button.

The serial numbers populate.



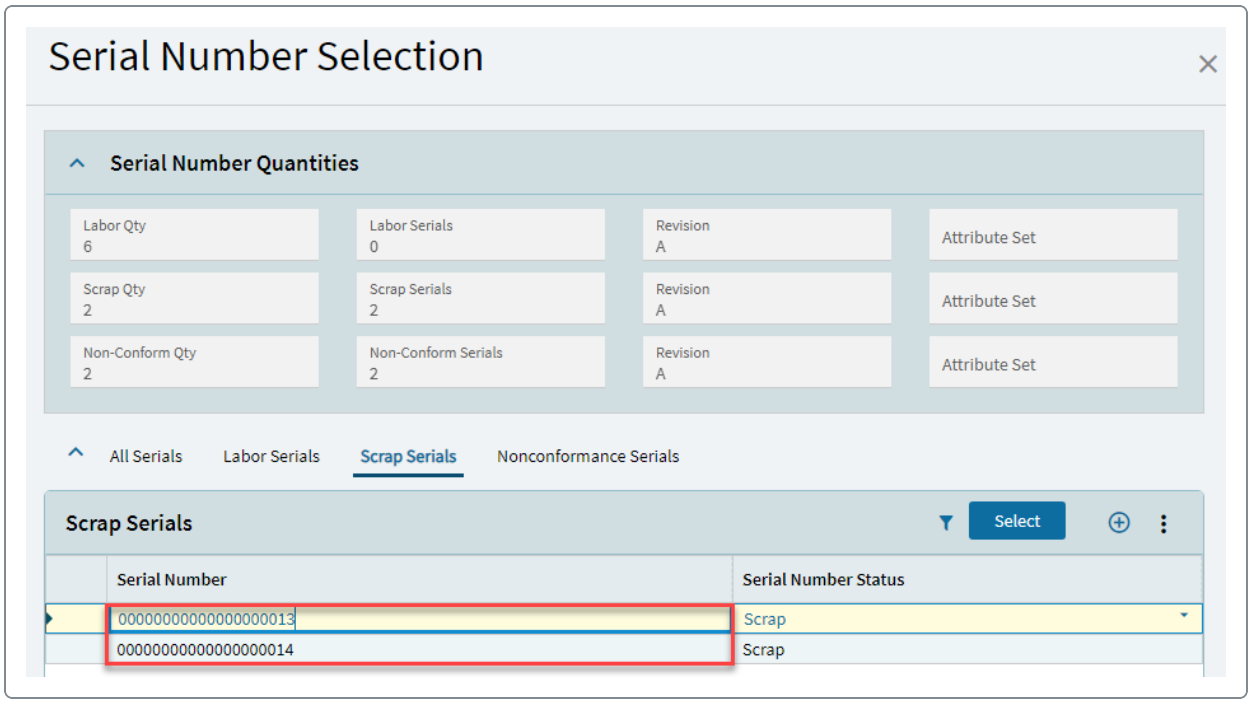
Notice only '8' serial numbers display. This is because we assigned '2' for non-conformance already.

11. Next, we select **2** serial numbers.

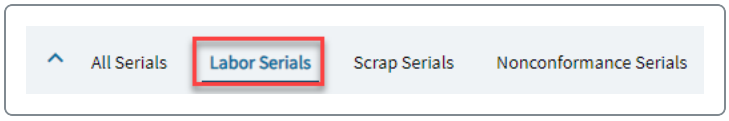


12. Inside the panel, select **Ok**.

    The selected serial numbers display on the **Scrap Serials** card with the **Scrap** status.

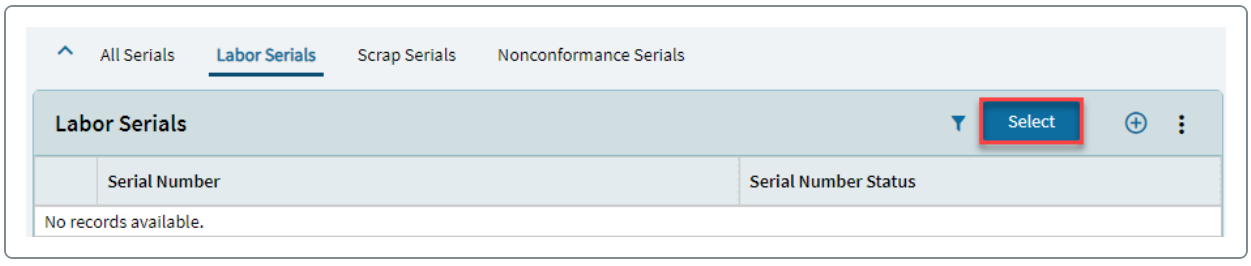


13. Next, we select the **Labor Serials** tab.

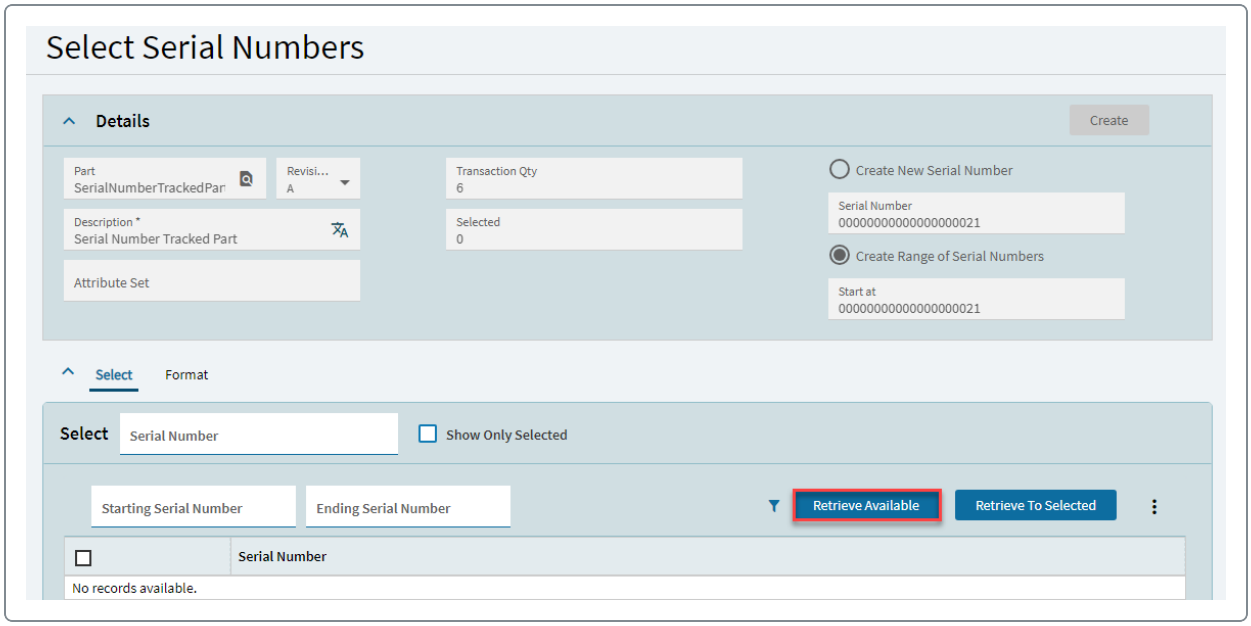


14. Select the **Select** button.

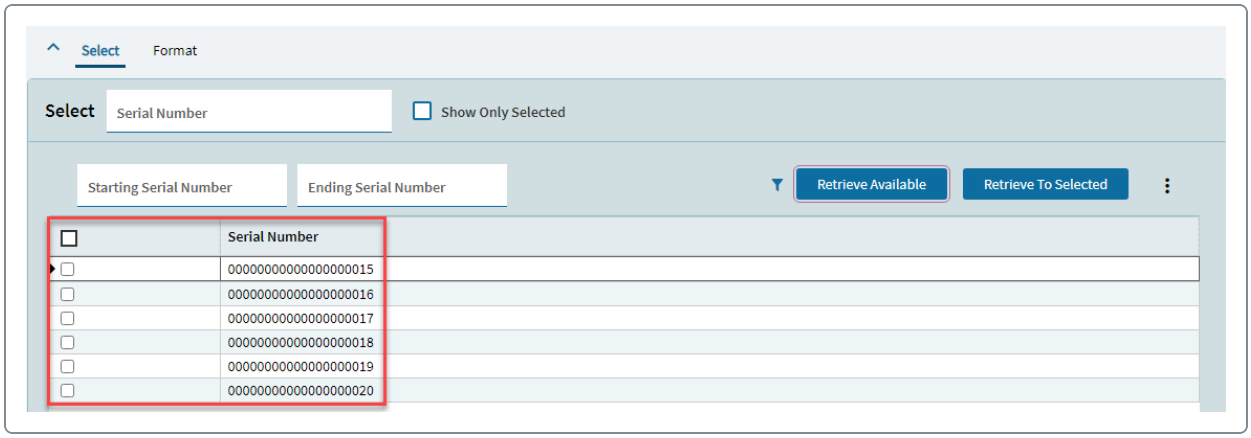
    The **Select Serial Numbers** panel opens.



15. Inside the panel, we select the **Retrieve Available** button.

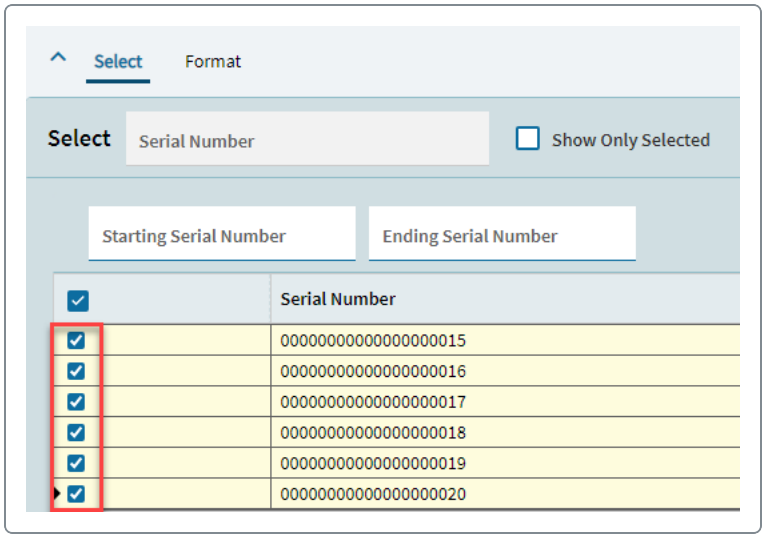


The serial numbers populate.



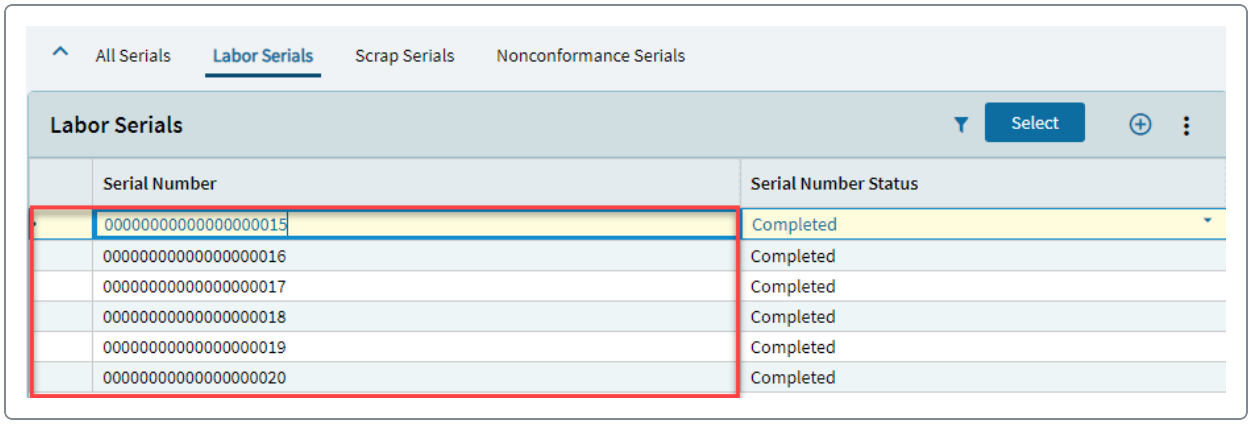
Notice only '6' serial numbers display. This is because we assigned '2' for non-conformance and '2' for scrap already.

16. Next, we select all **6** serial numbers.

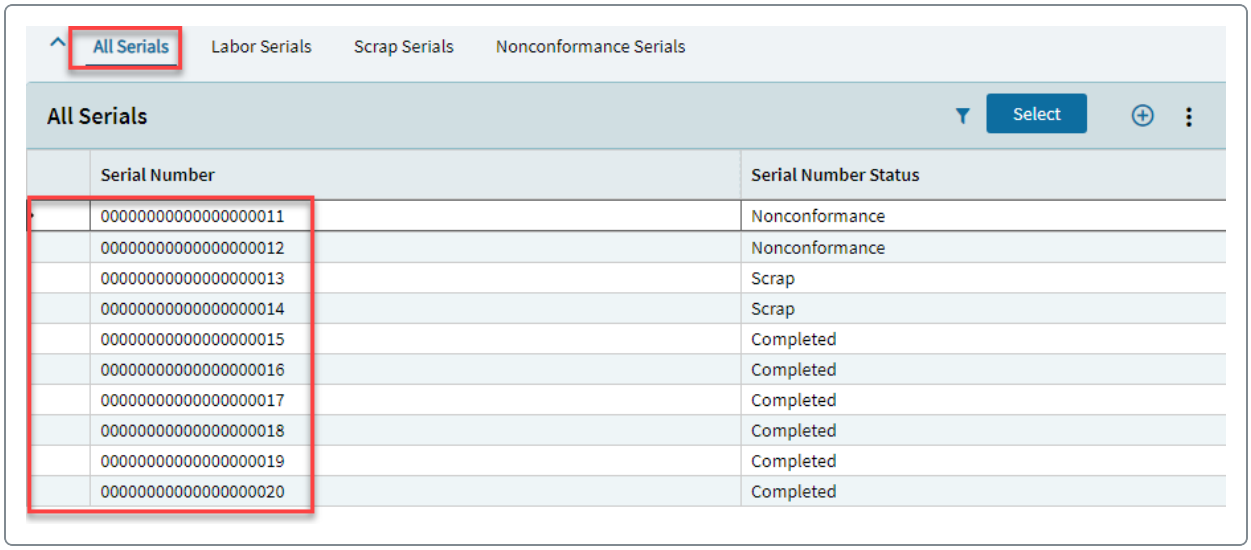


17. Inside the panel, select **Ok**.

    The selected serial numbers display on the **Labor Serials** card with the **Completed** status.

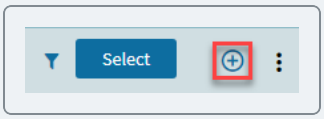


18. Next, we select the **All Serials** tab.



The card displays all the assigned serial numbers with respective statuses. In this case, **Nonconformance**, **Scrap**, and **Completed**.

If your want to add a new serial number, select new on the **Nonconformance Serials**, **Scrap Serials**, **Labor Serials**, and **All Serials** cards.

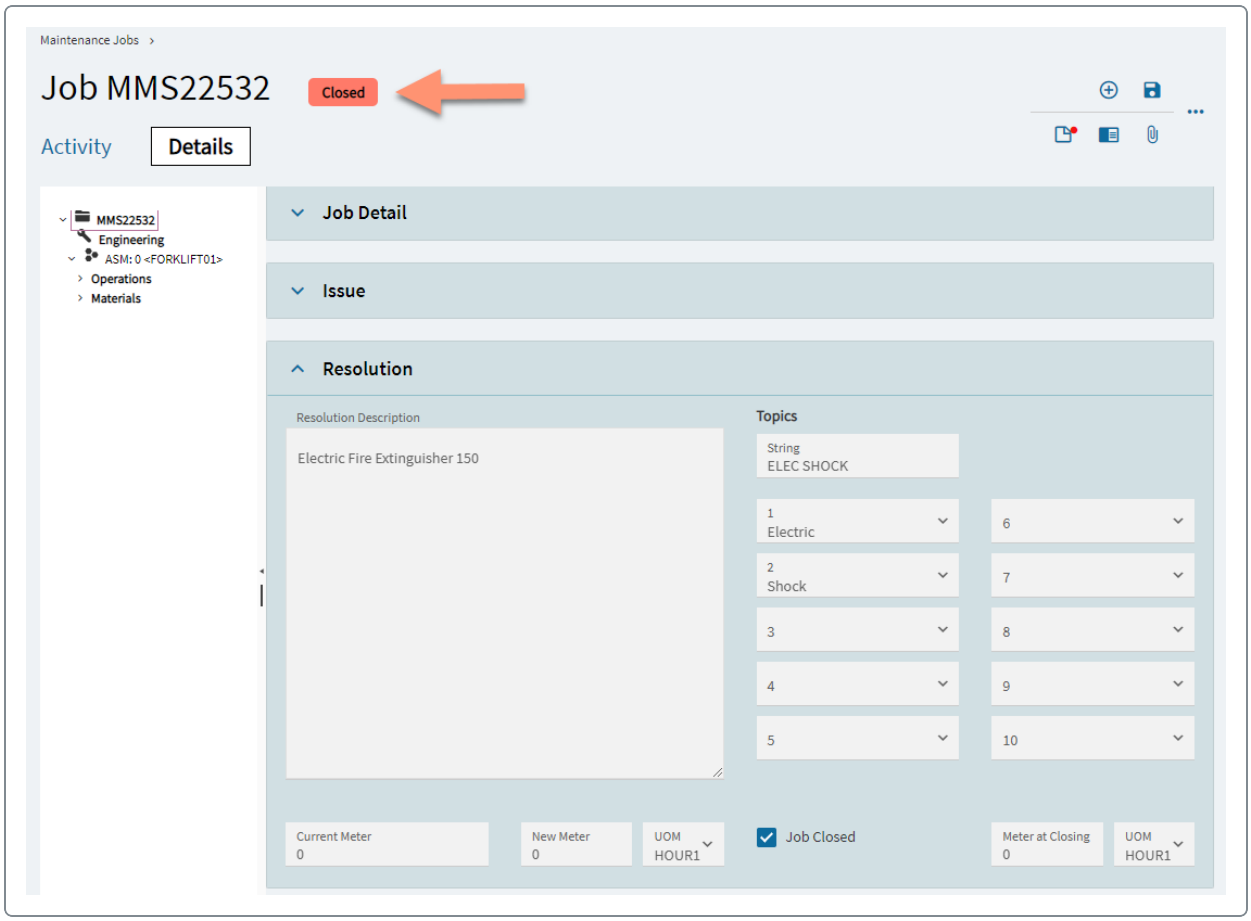


Completing a Maintenance Job

Once you have recorded labor time against the maintenance job, you must close it in Maintenance Job Entry. You can then add text that describes the specific resolution for the maintenance issue.

1. From the main menu, go to **Service Management > Maintenance Management > General Operations > Maintenance Job Entry**.
2. Select the maintenance job you want to complete.
3. Expand the **Resolution** card.
4. Enter the Description text that indicates the maintenance problem is resolved.
5. Select the Topics that define how the maintenance problem was resolved.
6. Select the **Job Closed** check box to close the maintenance job.
7. Select **Save**.

The Status indicator for the maintenance job now displays as **Closed**.

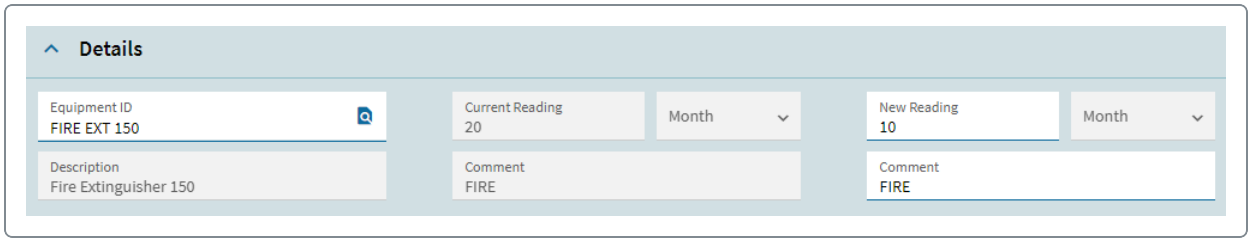


Entering Equipment Meter Readings

In **Meter Reading Entry**, you record meter data for a specific piece of equipment. The meter reading is the term of current equipment service. Meter readings help you keep up with the preventative maintenance for your selected equipment.

You can view meter reading information in **Equipment Tracker**. **Maintenance Plan Processor** uses meter data to create and schedule required maintenance jobs.

1. From the main menu, navigate to **Service Management > Maintenance Management > General Operations > Meter Reading**.
2. Select the piece of equipment.
3. The **Current Reading** field displays the meter reading that you added before.
4. Enter the **New Reading** quantity, and add a comment.



5. Select **Save**.

Running the Maintenance Plan Processor Process

Run the **Maintenance Plan Processor Process** to generate maintenance jobs based on maintenance plans you have defined for equipment records using the **Equipment Maintenance > Maintenance Planning > Detail** sheet, and meter readings you have recorded for the equipment in .

This is a background process that scans maintenance plans. Once scanned, it analyzes the data and generates maintenance jobs when equipment has reached designated maintenance dates or meter readings. You can then edit the resulting maintenance jobs in Job Entry. The background scan runs only for the companies that hold user permissions.

The process uses the value you entered in the **Daily Usage** field located on the Equipment Maintenance > Detail sheet in conjunction with the value you enter into the **Buffer Days** field located on the Equipment Maintenance > Maintenance Planning > Detail sheet to calculate the due date for maintenance jobs it generates from maintenance plans defined for the piece of equipment. For example, if you specified **5** in the **Buffer Days** field, the process generates maintenance job records five days in advance of the required due date.

The **Selection** parameters include:

- **Filter** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Continuous Processing** - Specifies if the process runs as a continuous background process, or as process that runs only when invoked from the menu.
- **Continuous Processing Delay** - If you select the Continuous Processing check box, specify the processing delay in minutes. For example, if you enter the value of 60, the process runs in the background with a 60 minute delay between each processing run.
- **Schedule** - Select the schedule used to run the process. The options include **Now**, **Startup Task Schedule**, and any other user-defined schedules created for your company.
- **Recurring** - Select to indicate that the process should run on a repeating basis. This check box is available only if you select a schedule other than **Now**.

If you run this process as a continuous task and this task stops in the task agent, it still runs on the application server. When this occurs, you will see a message in the **Epicor ICE Task Agent Service** event log that states the task continued running on the server. You can access this log from **Task Agent Configuration**. Because this message is a warning, you can also view it in the **System Monitor**.

To run the process:

1. From the main menu, go to **Service Management > Maintenance Management > General Operations > Maintenance Plan Processor**.
2. Select the required options.
3. Select **Process**. 

Reports

This section describes some key maintenance management reports you use to review maintenance entries. You can run these reports whenever you need. You can also set up each report to generate and print through a recurring, automatic schedule.

Generating the Equipment List Report

Generate the **Equipment List Report** to print a listing of equipment master records created in Equipment Maintenance.

You can optionally print detail information, maintenance plans, child equipment records and maintenance log information for jobs closed after a specified date. If designated, each equipment record can also be printed on an individual pages.

The **Selection** parameters include:

- **Status** - Select the status level of the equipment to include on the report.
- **Equipment Type** - Select the kind of equipment you want to display on the report. You create these types on equipment records as well.
- **Print Details** - Select to print all the information for the listed equipment records.
- **Print Maintenance Plan** - Select to print the maintenance plan linked to each selected equipment record.
- **New Page per Equipment** - Select to designate each piece of equipment will print on an individual page.
- **Include Child Equipment** - Select to print secondary or child, equipment records linked to the equipment records listed on the report.
- **Print Maintenance Log** - Select to print associated maintenance logs for the equipment listed on the report.
- **Jobs Closed After** - Specify the job closure date. Maintenance log information prints for all maintenance jobs closed on or after this date.
- **Filter Summary** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than **Now**, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

- **Recurring** - Select this check box if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.

To generate the report:

1. From the main menu, go to **Service Management > Maintenance Management > Reports > Equipment List**.
2. Select the parameters depending on what you want the report to display.
3. Select **Print Preview**. 

Generating the Maintenance Request Report

Generate the **Maintenance Request Report** to create a hard copy of the maintenance job request information entered in Maintenance Request Entry.

The **Selection** parameters include:

- **Priority** - The priority code for which maintenance job requests should be printed on the report.
- **All Sites** - Select to include maintenance requests for all sites.
- **Request Status** - The request status for which maintenance job requests should be printed on the report.
- **Request On or After** - The beginning request date. Maintenance jobs requested on or after this date print on the report.
- **Print Bar Codes** - Specify if the bar code for the maintenance job order request identifier should print on the report, similar to how the bar coded job number displays on job travelers. Select the check to print the bar code for the maintenance job order request identifier should print on the report.
- **Required On or Before** - The ending request date. Maintenance jobs requested on or before this date print on the report.
- **Filter** - Filter the report using the Requests, Requested By, Equipment IDs, Equipment Types, and Location records.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Report Style** - Select the report style option you want to use to run this report.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **Recurring** - Select if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.
- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

To generate the report:

1. From the main menu, go to **Service Management > Maintenance Management > Reports > Maintenance Request Report**.
2. Select the report parameters.
3. Select **Print Preview**. 

Generating the Maintenance Job Report

Generate the **Maintenance Job Report** to review and print a hard copy version of a maintenance job previously entered in Maintenance Job Entry. The report is similar to a standard job traveler that a tradesman or manager can print and take to complete a maintenance job on a piece of equipment.

The **Selection** parameters include:

- **Options** - Select what you want the report to displays. For example, if you select the **Print Scheduled Resources** check box, the report displays resources that are scheduled for a maintenance job.
- **Filter** - Informs you whether you used filters or not. After you select a specific filter option, the fields located in this pane display values depending on whether you filtered (Some Selected) or you did not (All Selected).
- **Report Style** - Select the report style option you want to use to run this report.
- **Schedule** - Indicates when you want to print the report. If you select something other than Now, the Recurring check box is available.
- **Archive Period** - Time period you want to keep the report in the System Monitor. The default is 0 Days, meaning that the report will be deleted from the monitor shortly after being printed.

  After the Archive Period passes, the report is purged from the system. When a report is exactly purged is determined by a combination of the date/time the report generates, the number of days set in the report's Archive Period, and the Report Purge Frequency setting. The Report Purge Frequency is defined in the System Agent within its Task Agent Purge Settings.

- **Recurring** - Select if you want the report to run on a repeating basis. The check box is only available if you select a schedule other than Now.
- **User Description** - Describes a specific report run. The entered description displays in the System Monitor.

To generate the report:

1. From the main menu, go to **Service Management > Maintenance Management > Reports > Maintenance Job Report**.
2. Select the report parameters.
3. Select **Print Preview**.