

Telematics Guru - Scheduled Maintenance and Reminders

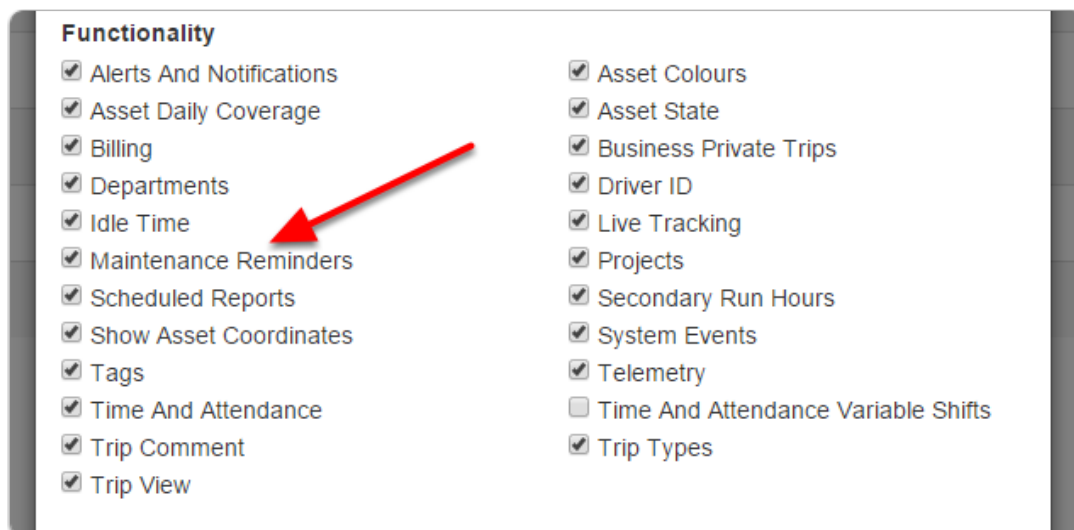
23 January 2016

This article describes the Scheduled Maintenance and Reminders (SMR) module available as an add-on module in Telematics Guru (TG).

TG = Telematics Guru
SMR = Scheduled Maintenance and Reminders

Enable the SMR Functionality For the Organisation

Edit the Organisation from "Admin->Organisations" and ensure that the Scheduled Maintenance functionality is enabled



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Introduction

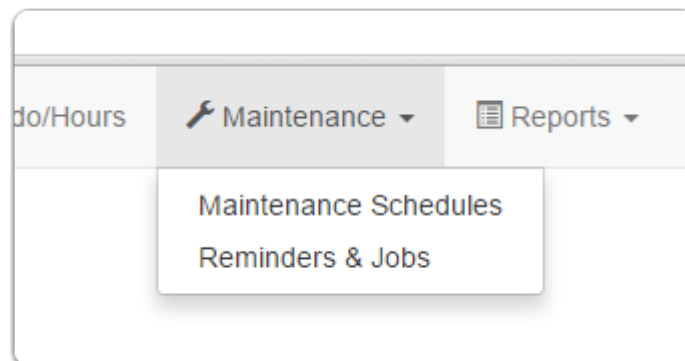
Scheduled Maintenance and Reminders (SMR) allows you to create "Maintenance Schedules" for your assets.

Some useful terms:

Maintenance Schedule - this defines the schedule, the list of Assets and the various options relating to how they are to be scheduled

Job - a Job is created when an Asset becomes due for the work to be done as defined in the Maintenance Schedule

Reminder - this is created in the Job List as a Reminder ahead of the Job being created, so that you can get ready / book / plan for the upcoming Job



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Maintenance Schedules

This screen allows you to view, edit and create Maintenance Schedules.

(1) To view the details and assets linked to a Maintenance Schedule select it from the drop-down.

(2) The details of the selected Maintenance Schedule will be displayed

(3) Assets that are linked to the Maintenance Schedule are listed showing their latest values and when they are next due for a Job to be created for them based on the schedule

Select Maintenance Schedule 1

Tires! ▼ Edit This Schedule Create New Schedule View Open Jobs

Schedule Details: Service per 1122 kms 2
Notes: Use Goodyears

3 The assets listed below are linked to the selected maintenance schedule above. To add or remove assets, edit the maintenance schedule. Click table column headings to sort the table by that column.

Asset	Current Odometer	Scheduled Odometer	Notes
Alex P's G52S	180.1 km	1,291 km (1,111.0 km to go)	Action Now Edit Delete
Alex S G60	1,090.8 km	2,202 km (1,111.0 km to go)	Action Now Edit Delete
James' Test Remora	48.9 km	1,160 km (1,111.0 km to go)	Action Now Edit Delete

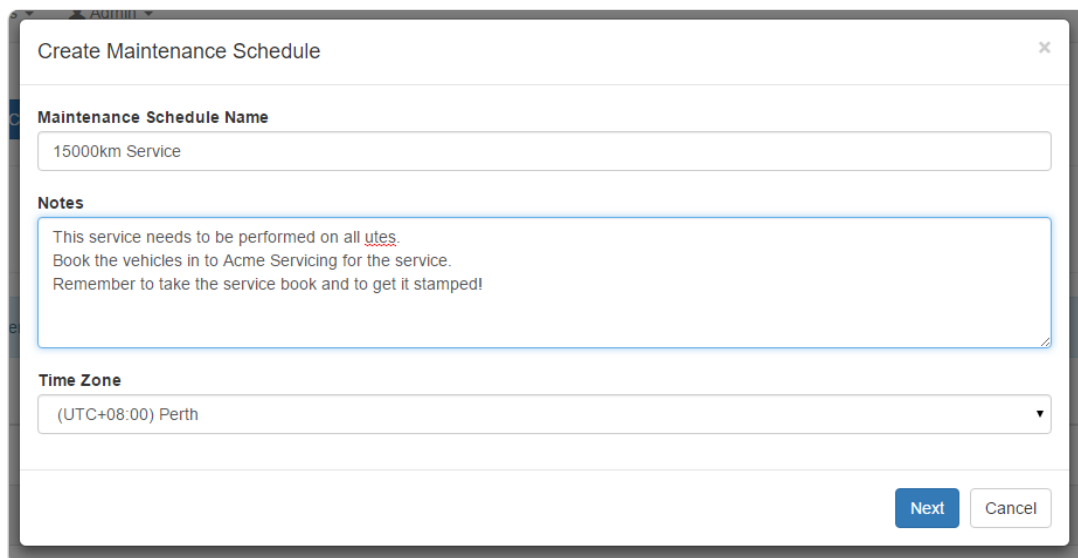
Creating a New Maintenance Schedule

Click on "Create New Schedule"

Enter the Maintenance Schedule Name - use something descriptive that will allow you to easily remember what this schedule does.

The Notes field can be used to enter any additional information that you might want to have for this schedule. It can be used to remind people of what they need to do when preparing to action one of the Jobs.

The Time Zone is used for displaying times that related to this schedule.



The screenshot shows a web form titled "Create Maintenance Schedule". It contains three main sections: "Maintenance Schedule Name" with a text input field containing "15000km Service"; "Notes" with a text area containing "This service needs to be performed on all utes. Book the vehicles in to Acme Servicing for the service. Remember to take the service book and to get it stamped!"; and "Time Zone" with a dropdown menu set to "(UTC+08:00) Perth". At the bottom right, there are "Next" and "Cancel" buttons.

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Select Assets

Select the assets that you want this Maintenance Schedule to apply to.

TIP - double click on the asset to move it to the other list

You can use the arrow buttons to move the assets to / from the Linked Assets list.

The double arrow buttons move all of the assets.

Create Maintenance Schedule

Double-click an asset to move it to the other list. Begin typing in the search box to filter the list of available assets.

Assets	Linked Assets
search for asset <input type="text"/>	DME Generator
102437	
Alex P G100 113633	
Alex P's G50 1106	
Alex P's G50 1218	
Alex P's G50 1342	
Alex P's G52S	
Alex P's G60	
Alex P's G60 3W	
Alex S G50	
Alex S G60	
AlexP 2G G60 102860	
AlexP Dart 2G 114719	
AlexP Dart 3G 114852	
AlexP Max M8Q	
AlexP Demora	

Buttons: >>, >, <, <<

Buttons: Back, Next, Cancel

Define The Schedule

This screen allows you to set the options for how the schedule must work.

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We use the following terms:

Action - A Job will be created in the Job list to perform the required maintenance

Reminder - a Reminder is created in the Job list to remind you that the maintenance will be actioned soon, and you can prepare for that

Create Maintenance Schedule

i The **Maintenance Schedule** dictates **when** the next maintenance job will be actioned. Not all the conditions are required. Any **combination of criteria** (Odometer, Run Hours, Secondary Run Hours and Calander) can be used. Whichever of the criteria **occurs first** will result in a maintenance job being created for the asset.

Secondary Unit Maintenance **i**

Odometer

Use Absolute Value **i**

Action Interval (kms) (optional)

Reminder Notice Period (kms before action) (optional)

Run Hours

Calendar

Secondary Unit Maintenance

TG allows you to now track run hours for a "secondary unit" on an asset if you have a digital input connected to the unit to monitor when it is running. This is like an electronic hour meter and TG will add the duration to the Asset's Secondary Run Hours.

SMR allows you to schedule maintenance based on the run hours of the secondary unit.

Select this checkbox only if you wish to schedule maintenance based on the Secondary Unit's run hours.

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You can then specify the Run Hour options or the Calendar options. More on these below.

Edit Maintenance Schedule

i The **Maintenance Schedule** dictates **when** the next maintenance job will be actioned. Not all the conditions are required. Any **combination of criteria** (Odometer, Run Hours, Secondary Run Hours and Calendar) can be used. Whichever of the criteria **occurs first** will result in a maintenance job being created for the asset.

Secondary Unit Maintenance **i**

Run Hours (Secondary)

Calendar

Back **Save** **Cancel**

Odometer Based Schedule

This uses the Odometer value for the Asset to decide on when the next Maintenance Job must occur.

When creating an Odo schedule you have the option of using Absolute or Relative scheduling:

Absolute

Absolute will schedule the maintenance based on the specified interval. In this example the schedule will create a Job at 15,000km and then 30,000km, 45,000km etc. If the Asset has a Odo reading of 55,000km when the schedule is created then the next Job will be scheduled for 60,000km (as it is a multiple of the Absolute interval) and then 75,000km etc after that. This option is the most commonly used.

Relative (not using Absolute)

A Relative schedule will add the interval to the Asset's Odometer reading **at the time that the maintenance is done**.

If the Asset has an Odo reading of 55,000km when the schedule is created then the next Job will be scheduled for 70,000km

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The Reminder Notice Period is used to create a Reminder in the Job List so that you can prepare for the upcoming Job. For an Odo schedule this is specified in the number of km before the Maintenance Action becomes due.

Odometer

Use Absolute Value [i](#)

Action Interval (kms) (optional) Reminder Notice Period (kms before action) (optional)

Run Hours Schedule

This uses the Run Hour value for the Asset to decide on when the next Maintenance Job must occur.

You have the option of using Absolute or Relative scheduling:

Absolute

Absolute will schedule the maintenance based on the specified interval. This option is the most commonly used.

Relative (not using Absolute)

A Relative schedule will add the interval to the Asset's Run Hour reading **at the time that the maintenance is done**.

The Reminder Notice Period is used to create a Reminder in the Job List so that you can prepare for the upcoming Job. For a Run Hour schedule this is specified in the number of Run Hours before the Maintenance Action becomes due.

Run Hours

Use Absolute Value [i](#)

Action Interval (run hrs) (optional) Reminder Notice Period (run hrs before action) (optional)

Calendar Schedule - Absolute

This option uses the Date to decide on when the next Maintenance Job must occur.

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You have the option of using Absolute or Relative scheduling:

Absolute

Absolute will schedule the maintenance based on the specified Day on an annual basis.

This option is useful for licence / registration renewals.

Calendar

Use Absolute Date [i](#)

Day of Month

Month

Reminder Notice Period (days before action) (optional)

Calendar - Relative

Relative (not using Absolute)

A Relative schedule will add the interval to the Date that the maintenance Job was last done.

You can specify the interval in Days, Months or Years.

The Reminder Notice Period is used to create a Reminder in the Job List so that you can prepare for the upcoming Job.

For a Calendar schedule this is specified in the number of days before the Maintenance Action becomes due.

Calendar

Use Absolute Date [i](#)

Interval

Reminder Notice Period (days before action) (optional)

Maintenance Schedule - Asset List

The Asset List shows the Assets linked to the selected schedule and allows you to see when they are next due for a Job to be actioned for them based on the schedule.

The columns shown will differ depending on the options used when setting up the Maintenance Schedule.

Here the schedule is based on the Odo value so the Asset's current Odo reading (1) and the Odo that the next Job will be actioned (2) - with the difference calculated for you.

(3) You can manually Action the maintenance Job for an Asset if required. You would not normally do this but if an Asset happened to be in the workshop and you know that some maintenance was due to be actioned soon then you may want to bring that maintenance forward and do it now.

(4) You can also edit the schedule details for a particular asset if required. You would only do this if you needed to adjust the schedule **for that Asset only**. Be aware that if the Maintenance Schedule setup gets changed then your manual changes to the schedule may get over-written.

You can also delete an Asset from the Maintenance Schedule directly from the list.

Select Maintenance Schedule
15000km Service Edit This Schedule Create New Schedule View Open Jobs

Schedule Details: Service per 15000 kms
Notes: Some notes on what to do. Remember to take the service book with you to get it stamped. When the reminder is actioned make sure that you book the service with ACME servicing company.

The assets listed below are linked to the selected maintenance schedule above. To add or remove assets, edit the maintenance schedule. Click table column headings to sort the table by that column.

Asset	Current Odometer	Scheduled Odometer	Notes		
Alex P G100 113633	84.0 km	15,000 km (14,916.0 km to go)		Action Now	Edit Delete
Ken Kluger	81,701.0 km	90,000 km (8,299.0 km to go)		Action Now	Edit Delete

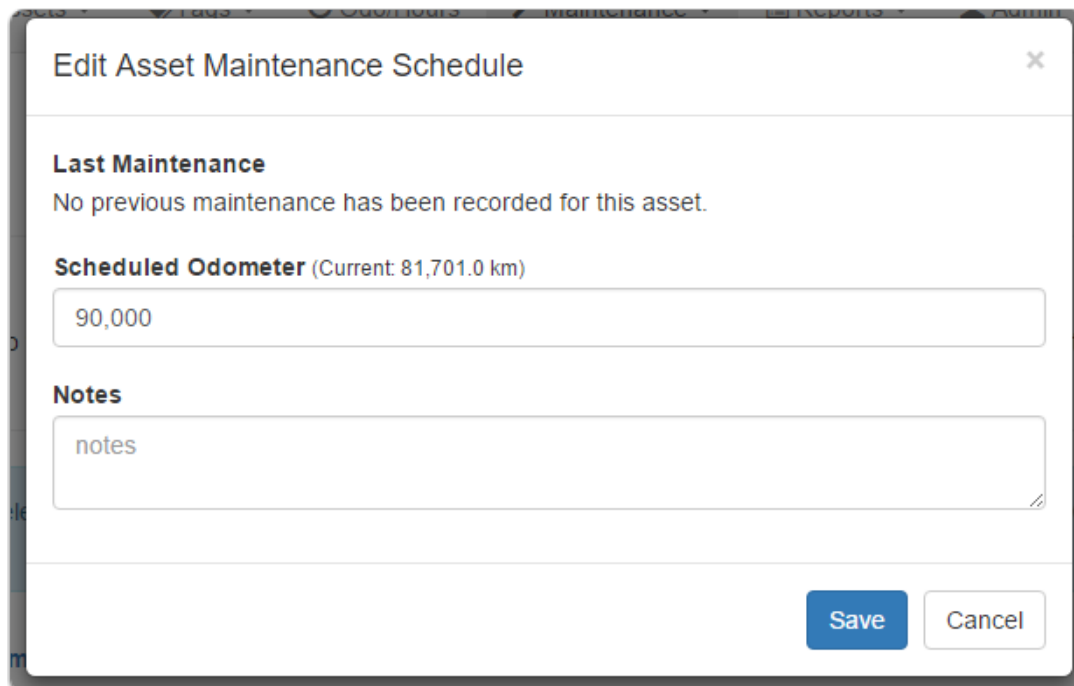
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Edit Asset Maintenance Schedule

This is used to adjust the schedule for a specific ASSET, as opposed to modifying the entire Maintenance Schedule's setup.

This is particularly useful to enter Notes that apply **to this specific Asset for this Maintenance Schedule**.

In this example the scheduled Next Job Odo value is displayed, and can be edited. For example you may wish to defer this specific Asset's next maintenance job out to 95,000km. Modifying the actual Schedule Odo is not something that you should need to do very often.



Edit Asset Maintenance Schedule [X]

Last Maintenance
No previous maintenance has been recorded for this asset.

Scheduled Odometer (Current: 81,701.0 km)
90,000

Notes
notes

Save Cancel

Jobs and Reminders

The SMR module maintains a list of Jobs and Reminders.

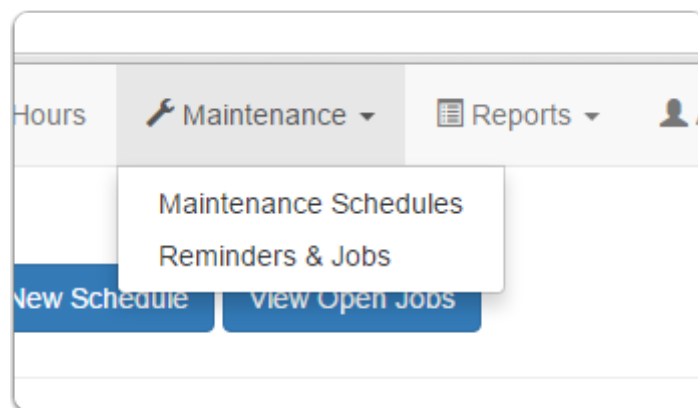
The system continually analyses the data coming in for Assets and will automatically create Jobs and Reminders for the Assets when the schedule options have been met.

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When these are created in the system they are "Open" and imply that some action is required.

You can go directly to the Jobs and Reminders list from the Maintenance Menu, or you can link to it from the "View Open Jobs" button on the Maintenance Schedules screen.

There are also reports available in the system and it is a good idea to schedule a report to email you a list of new Jobs and Reminders periodically, for example once a week.



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Jobs and Reminders - List

This screen allows you view and filter the Jobs and Reminders list.

(1) Select "All" or specific Assets

(2) Select "All" or specific Maintenance Schedules

(3) Select a date range. The default is to display items for the last month

(4) By default Jobs and Reminders that have been Closed are not shown in this list. You can select this option to show them

Type	Asset	Schedule	Description	Created	Actioned	Closed	Closed By	Notes
Job	Jenny	Tires!	Manually actioned out of schedule via web interface	22/01/2016	-	-	-	<input type="button" value="Add Notes"/> <input type="button" value="Close"/>
Job	Alex S G60	Tires!	Action Required: Odo now above 1'000 km	22/01/2016	-	-	-	<input type="button" value="Add Notes"/> <input type="button" value="Close"/>
Reminder	Jenny	Tires!	Reminder: Odo above 4'900 km (Scheduled: 5'000 km)	22/01/2016	-	-	-	
Reminder	Alex S G60	Tires!	Reminder: Odo above 900 km (Scheduled: 1'000 km)	22/01/2016	-	-	-	

Reports

The following reports are available for the SMR module.

They allow you to list the Jobs and Reminders based on report parameters.

It is recommended that you schedule the "Open Maintenance Jobs and Reminders" report to be emailed to a suitable person or group within your Organisation so that they will be proactively notified of new Jobs and Reminders that have been created in the system.

Scheduled Maintenance

<p>★ Maintenance History</p> <p>A report listing all scheduled maintenance jobs and reminders in a date range.</p>	<p>★ Open Maintenance Jobs and Reminders</p> <p>A report listing all new scheduled maintenance jobs and reminders for a variable number of past days.</p>
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