Chapter

5

PM Module

Preventive Maintenance (PM) today will help your assets last through tomorrow. The Preventive Maintenance (PM) module is where you setup PM schedules that in turn generate PM Work Orders against an equipment or location on an ongoing basis. Web Work supports two types of PM schedules – Calendar based PM's (weekly, monthly) and Usage based PM's (2000hr of operation, every 5000km). This Chapter describes how to use the Web Work, PM module.
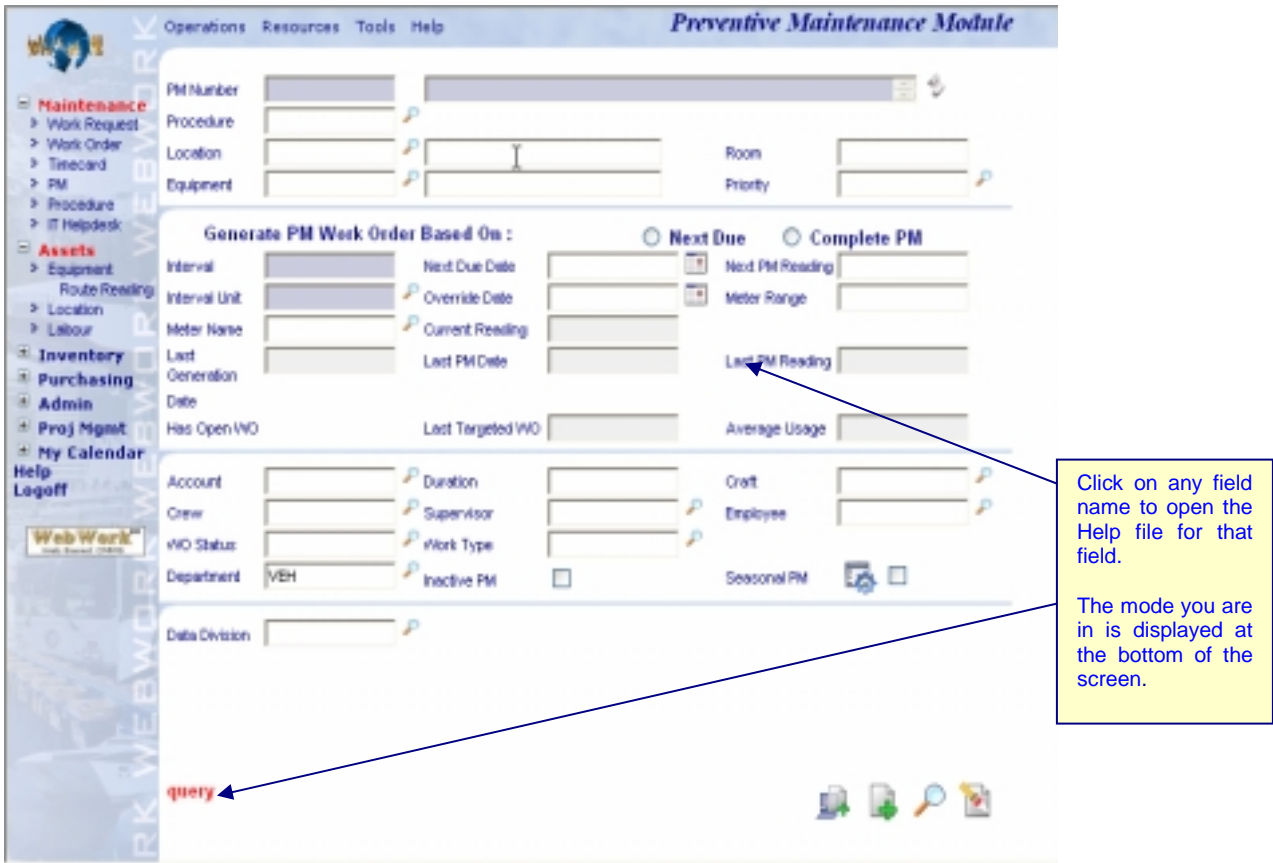
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5.1 Overview of the Preventive Maintenance (PM) Module

The PM module is where Preventive Maintenance schedules are created. These records generate Preventive Maintenance types of work orders.

- Click on the PM's button PM on the left hand side of the screen to open the PM Module.

- When you open the PM module you will be in Query mode as shown in the screen below:

Click on any field name to open the Help file for that field.

The mode you are in is displayed at the bottom of the screen.

- The Operations Resources Tools Help drop down menu contains the various features available in the PM module.

Web Work includes "help files" for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

5.2   Creating new PMs

Below we will explore how to create PMs for work that is to be done on a piece of equipment or at a location.

5.2.1   Adding new PM records - General

To create a new PM record:

• Click on the ⟩ PM button on the left hand side of the screen to open the PM Module.

• Click on the icon at the bottom right of the screen to enter into new mode.

• If you have an appropriate procedure already available, enter the procedure code into the procedure field. This will help you develop your PM information faster. (for more information on setting up Procedures, refer to the Procedures Module chapter in this manual)

Auto-Numbering is set up in the Admin module of Web Work. For more information on auto-numbering see the Admin section of this manual.

• Enter information into the fields displayed on the screen. This is described in more detail below.

• For calendar based PM, fill in the Interval, the Next Due date and also the Interval Unit (other than meter).

• For meter based PM, fill in the Next PM Reading, Meter Range, Meter Name and Interval Unit (must say meter).

• All other fields are common to both types of the PM schedule.

• Click on the button at the bottom right hand side of the screen to save the PM Record

• Once you save the new PM, you will then be in edit mode: you can edit and resave the PM record, add resources to the PM record, print the PM record or continue working in the module of your choice by clicking on the module button on the left hand side of the screen.

Click on the button next to PM description field to open a larger popup window for this field.

The Web Work system defaults can be setup to pre-approve all work orders when generated. See the Admin section of this manual for more information on setting up statuses in system defaults.

5.2.2   Adding new PM records – Calendar based

This section describes how to create a new PM schedule based on the calendar.

To create a new calendar-based PM record:

- Refer to section 2.1 – Adding new PM records first.

- Click on the [icon] icon at the bottom right of the screen to enter into new mode.

- The first section on the PM Main screen contains assignment details. By entering a Procedure code you can populate all the Estimated Resources on the PM. You can also use the procedure code to update many procedures linked to PM's when a task changes.

- You may assign the PM to either an Equipment record or a Location.

- You can enter the Priority as you want is to appear on the work order when generated.

- For the section **Generate PM Work Order based On:** Select the radio button beside **Next Due** or **Complete PM** option. These are explained below:

    o **Next Due** option – The PM record will generate a PM work order every time a frequency is met. The Next Due Date (calendar based PM) or Next Meter Reading (meter based PM) will advance forward upon the PM generation. When ever the PM is due, new PM work order will generate regardless.
    o **Complete PM** option – The PM record will generate a PM work order every time a frequency is met and the last work order generated by this PM has been completed or closed. The Next Due Date (calendar based PM) or Next Meter Reading (meter based PM) will advance forward when the PM work order is completed. The PM record will NOT generate a new work order while the last work order generated remains open. Once the open work order is completed / closed, the schedule will generate next work order based on the last due date (meaning only one latest work order gets generated instead of a whole pile of missed work orders).

- Choose the Interval Unit from the drop-down list. Use Day, Week, Month, and Year. Do **not** select meter option. It is only for meter based PM's.

- Enter the Interval for the selected Interval Unit. Example: for bi-weekly schedule, select Week in the interval Unit field and enter 2 (two) into the Interval field.

- Enter the Next Due Date. This date indicates on what date the next PM work order will be generated. This field gets automatically calculated from then on.

The PM generation process recalculates the Next Due Date when new PM Work Order gets generated. The formula is: old Next Due Date + (interval converted to days) = new Next Due Date.

5.2.3 Adding new PM records – Meter based

This section describes how to create a new PM schedule based on the Equipment Meter. To learn more about Equipment Meters, please see the Equipment Module Chapter under Equipment Specifications. Web Work can accommodate unlimited meters for each Equipment records and therefore unlimited PM's with unlimited meters for Equipment.

To create a new Meter-based PM record:

- Refer to section 2.1 – Adding new PM records first.

- Click on the [icon] icon at the bottom right of the screen to enter into new mode.

- The first section on the PM Main screen contains assignment details. By entering a Procedure code you can populate all the Estimated Resources on the PM. You can also use the procedure code to update many procedures linked to PM's when a task changes.

- You must assign a meter based PM to an Equipment record. The Equipment record must already have a Meter assigned to it. For more information on Equipment Meters, please see the Equipment Module Chapter under Equipment Specifications.

- You can enter the Priority as you want is to appear on the work order when generated.

- Type in the Meter name or use the query button to use the pick list. (i.e. Kms or Hours of operation) The list will show meters that have been assigned to the Equipment record you entered above.

- Type Meter into the Interval Unit field or use the query button to select "Meter".

- Specify the interval into the Interval field. Interval is a value specifying how often the Equipment is to be maintained based on the Meter Name (i.e. every 5000km).

- Input a value into the Next PM Reading field. Once the latest Equipment meter reading reaches the value in the Next PM Reading field, a new PM work order is generated.

- Enter a value into the Meter Range field. The value specified will be subtracted from the Next Pm Reading value and then be compared with the latest equipment reading. If the latest equipment reading value is same or higher than the result, new PM work order will be generated.

> The PM generation process recalculates the Next Pm Reading field when new PM Work Order gets generated. The formula is: Latest Equipment meter reading value + interval = new Next PM Reading

5.2.4   Setting up Seasonal PM records

This section describes how to make PM records seasonal. Seasonal PM's are generated only within a specified portion or of the year.

To Set-up a Seasonal PM record:

- From the PM Module, Query and Retrieve a valid PM.

- Click on the [icon] button beside

  Seasonal PM [icon] ☐ at the bottom right corner of the screen. A Seasonal PM window should appear as seen here.
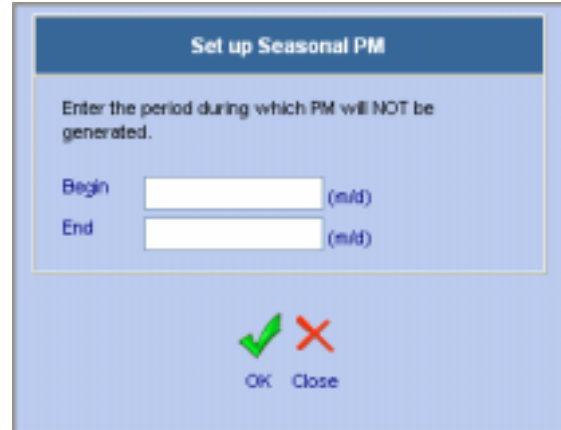
- Enter the starting and ending dates during which you don't want the PMs to be generated (specify the inactive season). The format is month/day. The Year is not specified as this is an interval that is repeated each year.

- Click on the ✔ button. The Seasonal PM checkbox ☑ will be checked.

- Back on the PM main screen, save the record by click on the [icon] button.

5.3   Adding Estimates to a PM

Estimates further define the PM schedule. Estimates include Tasks, Labour, Material and Tools. Once the PM record generates a new Work Order, the estimate information gets also passed over to the newly created Work Order.

5.3.1   Adding Estimates - Tasks

By adding tasks to a PM record, the employee assigned to complete the PM work order will be provided with a checklist of all estimated tasks/steps for completing the work.

To add tasks to a PM record:

- In PM module retrieve a PM record.

- Click on the Estimates tab.

- Click on the Tasks tab.

- Click on the button at the bottom of the screen to open the New PM Task screen.

 You may use already pre-defined procedures by entering the procedure code into the procedure field on the main screen. This way you don't have to re-enter Estimates each time.

- Enter the Task Number. The task list will be sorted, ascending, based upon this number and can indicate the order in which each task should be performed.

- Fill in the Description field. The description field captures the actual step for maintenance personnel to follow.

- Fill in the Task Memo. The Task Meme field is used to further define the Description.

- Measure Unit, Unit Cost, Quantity and Total Cost are optional fields and are explained in detail in the Work Order Chapter. This is explained in detail in the Procedure Chapter.

- Click on the SAVE button to save the Task.

- Repeat the steps to capture all individual Tasks. Refer to sample (as shown below):

Task Number	Description	Task Memo
10	Disconnect unit from power	use breaker AV-233 located behind the pillar on left side.
20	Open the compartment to access the motor and gearbox. Perform visual check for burns, debris, or anything out of spec	flashlight may be usful in some cases.
30	Oil the compressor pump.	use only designated compressor oil as per the tag printed.
40	Close up the unit, do final check and turn power back on.	

5.3.2 Adding Estimates – Labour

By adding labour estimates to a PM record, the workers will be able to distribute the job among them as necessary. There are three kinds of estimated labour types – to an employee (individual), to a vendor (contractor) or to a craft (trades). First we will describe how to enter the Labour below. Then we will describe how to describe the three different types.

To specify Labour on a PM record:

- Retrieve a PM record.

- Click on the **Estimates** tab.

- Click on the **Labour** tab.

- Click on the   button at the bottom of the screen to open the Labour Resources screen seen here.

- The PM # and Trans. Date fields are filled in automatically. The PM # field cannot be edited, however the Trans. Date field can.

- The Scale automatically defaults to 1. To change this, delete the current scale and add the scale of your choice. The Labour Rate will be multiplied by the Scale.

- Enter the estimated number of hours into the Hours field. When you enter the number of hours, the taxes and total will be calculated by the Web Work system.

- The Rate field will be filled in with the rate setup for the employee in the Labour module. To change this rate, delete the rate shown and enter the rate of your choice.

- Enter any additional cost. If an additional cost is added, the taxes and total will be updated accordingly.

- Enter Tax 1 and 2 if applicable. If taxes are entered the total will automatically be recalculated.

- Enter an account to charge this Labour to if applicable.

- The Desciption field displays the complete name of the Employee you choose.

- The ChargeBack Amount can be used to Invoice work done for outside clients. It can be used as a means of markup on the cost. This is explained in detail in the Procedure Chapter.

- Click on the   button at the bottom right hand side of the screen to save the Labour Estimate.

Labour allocation may be assigned to individual Tasks by specifying the Task Number from the drop down menu. Each Task may have one or more Labour allocations estimated.

Assigning Estimated Labour to employee:

- Enter an employee code into the Employee field or use the pick list to select the Employee or the Requestor. The employee code may fill in additional information if entered within the Labour module.

- Finish filling in the rest of the fields, including the estimated Hours.

Assigning Estimated Labour to Vendor:

- Click onto the Employee query button to open the Employee/Requestor selection screen.

- Select the Vendor radio button and perform a search by clicking the ▽ button.

- Pick the vendor of your choice.

- The selected vendor will populate the main screen as if it was an employee that was picked.

Assigning Estimated Labour to Craft:

- Leave the employee field blank.

- Enter the craft into the Craft field or click the Craft query button to search for craft code of your choice.

- Pick the Craft of your choice.

- If only craft is present, the selected craft populates the main screen as if it was an employee that was picked.

Transaction Date	Employee	Description	Account	Rate	Additional Cost	Hours	Total Cost
7/22/2005	VEND01	Vendor 01	GEN.MAINT-083	$10.00	$0.00	0.75	$7.50
7/22/2005	TECH.	COMPUTER TECHNICIAN	GEN.MAINT-081	$30.00	$0.00	0.5	$15.00
7/22/2005	A.TYMINSKI	ALINA TYMINSKI		$20.00	$0.00	0.75	$15.00
					Total	2	$37.50

You can estimate Craft, Employee, and Vendor all individually:

Vendor

Craft

Employee

5.3.3   Adding Estimates - Materials

Add materials to a PM record to indicate what's needed to do the job. Materials include inventory stock, inventory non-stock and non-inventory items.

To add Materials to a PM record:

- Retrieve a PM record. Check Queries section of this manual for more information.

- Click on the **Estimates** tab.

- Click on the **Materials** tab.

- Click on the button at the bottom of the screen to open the Material Resources screen.

- The PM # and Issue Date fields are filled in automatically. The PM # field cannot be edited. You can edit the Issue Date field by deleting the current date and entering the date of your choice.

- For inventory stock and non-stock items, click on the Storeroom query button to select the storeroom and the item from that storeroom. This will populate the Storeroom, Item, Description, Unit and Price fields on the Material Resource screen.

- For non-inventory item, leave the Storeroom window blank and only enter the Item Number (code must be unique) and the Item's Description.

- Enter the quantity. The tax and extension fields will be calculated automatically.

> Material allocation may be assigned to individual Tasks by specifying the Task Number from the drop down menu. Each Task may have one or more Material allocations estimated.

- Enter any additional cost if needed. When an additional cost is added, the tax and extension field will automatically be recalculated.

- Enter an account if applicable or click on the button to select an account from the Web Work database.

- The ChargeBack Amount can be used to Invoice work done for outside clients. It can be used as a means of markup on the cost. This is explained in detail in the Procedure Chapter.

- Click on the button at the bottom to save the material estimate.

5.3.4   Adding Estimates - Tools

Add Tools to a PM record to indicate what equipment or tools are needed to do the job. Tools include items.

To add Tools to a PM record:

- Retrieve a PM record.

- Click on the **Estimates** tab.

- Click on the **Tools** tab.

- Click on the button at the bottom of the screen to open the new Tool Resources screen.

- The Trans. Date field is filled in automatically. To edit this field, delete the current date and add the date of your choice.

- If the tool is already an existing equipment record, enter an equipment code or click on the 🔎 button to select an equipment record from the Web Work database. The description will get filled in automatically.

- If the tool is not identified as equipment, then type an arbitrary code into the equipment field and fully explain the tool in the Description field. The arbitrary code must NOT be a code of another existing equipment record.

> 👉 Tool allocation may be assigned to individual Tasks by specifying the Task Number from the drop down menu. Each Task may have one or more Tool allocations estimated.

- Enter the Rate for the usage of the Tool, if applicable. Enter zero otherwise. If a valid Equipment code is entered and there is a Rate on the Equipment record it will automatically populate.

- Enter Issue Unit.

- Enter the quantity of the Tools required. The tax and extension fields will be calculated automatically.

- Enter any additional cost. When an additional cost is added, the tax and extension field will be recalculated automatically. Taxes get calculated automatically, but can be edited if needed. Once taxes are entered the total will automatically be recalculated.

- Enter an account if applicable or click on the 🔎 button to select an account from the Web Work database.

- Extension is a calculated field showing the total value in Dollars.

- The description field will automatically populate with the description of the equipment record selected and can be modified.

- The ChargeBack Amount can be used to Invoice work done for outside clients. It can be used as a means of markup on the cost. This is explained in detail in the Procedure Chapter.

- Click on the button at the bottom right hand side of the screen to save the tool estimate.

5.3.5   Editing PM Estimates

To edit procedure estimates:

- Perform a query to locate and retrieve the PM record you wish to edit.

- Move the mouse over the Resources menu to display the drop down menu.

- Click on the **Estimates** tab.

- Click on the task, labour, materials or tools tab, depending on which one you want to edit.

- When the applicable screen pops up, enter the new information into the applicable fields.

- Click on the button at the bottom right hand side of the screen to save the edited estimate.
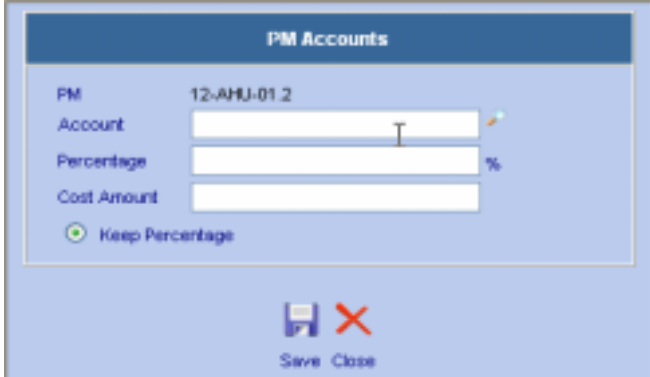
Updating the tasks for a PM does not update the associated procedure. To update the procedure, go to the procedure module, do a query to select the applicable procedure and then edit it as required.

5.3.6   Applying PM Costs to more than one Account

To apply PM costs to more than one account:

- Perform a query to locate and retrieve the PM record that Accounts will be added to.

- Click the **Accounts** tab.

- Click on the button to open the Add PM Accounts window.

- Enter an account into the Account field, or click on the QUERY button 🔍 to select an account from the list of accounts in the Web Work database.

- Enter the percentage of the total estimated cost of the PM record that is to be charged to this account. Do not enter a percent sign, only the numerical value of the percentage (i.e. 35).

- The cost amount will be calculated automatically by the Web Work system.

- Click on the ![save icon] button to save this account information.

5.4 Deleting PM Records

There may be times when it is necessary to delete a PM record, as would be the case if a piece of equipment no longer exists.

To delete a PM record:

- Retrieve a PM record. Check.

- Move the mouse over the Operations dropdown menu at the top of the PMs Screen to display the options.

- Select Delete This PM from the drop down menu.

- A message box confirming you want to delete the procedure and associated resources will be displayed.
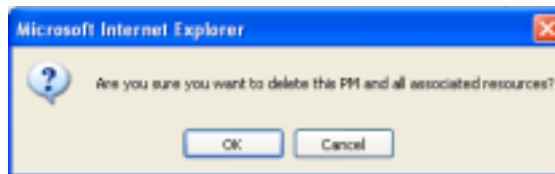
- Click on the OK button to delete the PM record or the CANCEL button to cancel this action.

5.5 Generating PMS

PM records should be generated on regular basis to produce work orders for the scheduled preventive maintenance work.

5.5.1 <u>Generating Calendar Based PM records</u>

To generate Calendar PM's for a specified number of days:

- Open the PM Module, perform a Query and Retrieve the PM records you wish to Generate for.

- Click the ![generate icon] button (at the bottom right corner of the screen) to open the Generate PM Work Orders screen.

- Choose one on the following three options by clicking the radio buttom beside the label

    All PM records – will check all PM records and generate any that are due.

    Selected PM records – will check only the PM records retrieved by your query and generate any due from this set.

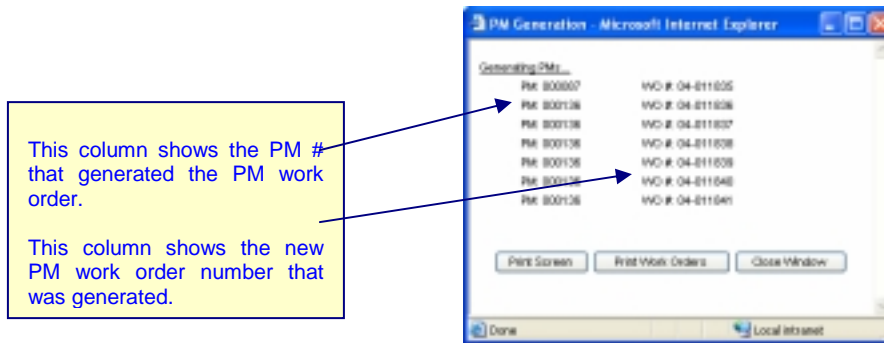   This PM record – will only check the PM record currently displayed in the Main PM screen and gnerate it if due.

- Click on the RADIO button beside Calendar PM.

- Enter the number of days into the Generate WOs for the next ___ day's field. This number determines how many days ahead from today Web Work should generate upcoming PM's.

- From the Sort work order printout by dropdown list, choose by what field the report is to be sorted by.
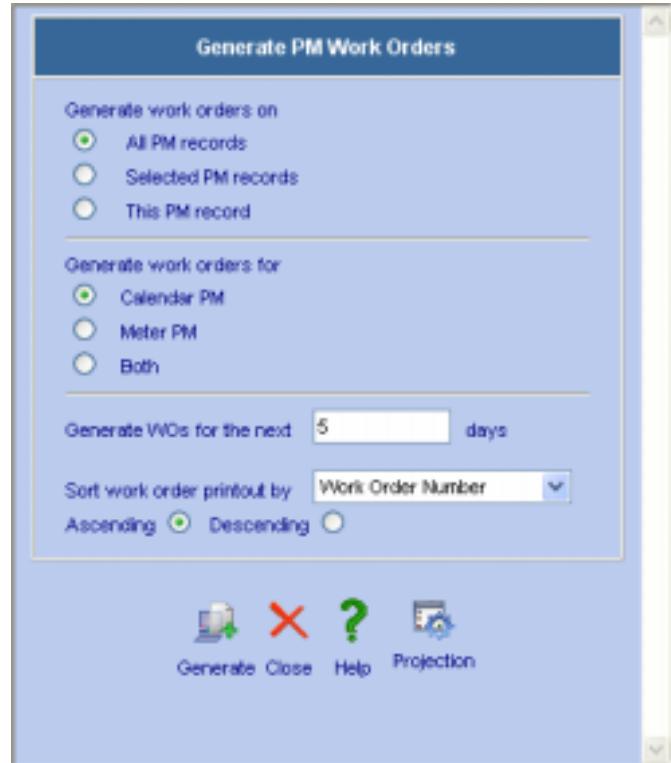
- Pick whether the selection from above is to be sorted in ascending (a-z) or descending (z-a) order.
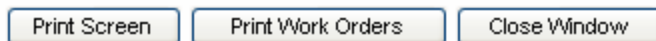
- Click on the [button icon] button to generate the PM's.

- If PM records were generated, screen similar to the one below will appear:

This column shows the PM # that generated the PM work order.

This column shows the new PM work order number that was generated.

Generate WOs for the next ___ days tells Web Work how many days ahead you would like to generate PM work orders for. Type in One (1) or higher into this field. If you put a Zero (0) into this field it will force the generation of all selected PM work orders whether they are due or not!

- If you wish, you can print the result screen by clicking on the PRINT SCREEN button. Also the Close Window button will close this window without running the PM work order report. You can always reprint the generated work orders from the Work Order module by querying on the newly generated PM work orders.

- Click on the Print Work Orders button to continue with printing of the PM work orders. The PM work order report will open in a new browser window.

Print Screen	Print Work Orders	Close Window

- Click on File and select Print from the drop down menu to proceed with printing.

5.5.2   Generating Meter Based PMs

To generate Meter based PM's:

- Open the PM Module, perform a Query and Retrieve the PM records you wish to Generate for.

- Click the ▣ button (at the bottom right corner of the screen) to open the Generate PM Work Orders screen.

The PM Generation screen will open:

- Choose one on the following three options by clicking the radio button beside the label

    All PM records – will check all PM records and generate any that are due.

    Selected PM records – will check only the PM records retrieved by your query and generate any due from this set.

    This PM record – will only check the PM record currently displayed in the Main PM screen and gnerate it if due.

- Click on the RADIO button beside Meter PM.

- The Generate WOs for the next ___ days field is not used for Meter based PMs – ignore it.

- From the Sort work order printout by dropdown list, choose by what field the report is to be sorted by.

- Pick whether the selection from above is to be sorted ascending (a-z) or descending (z-a) order.

- Click on the ![button] button to generate the PMs.

If there were no PM records due for generation at this time, a screen similar to the one below will appear:
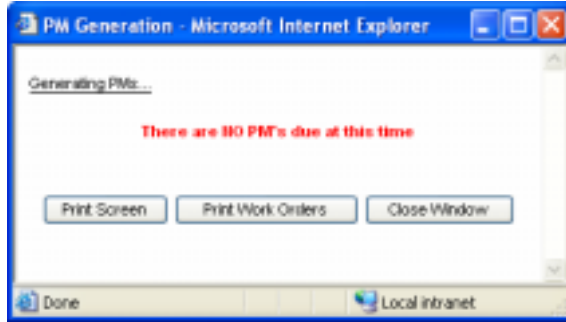
In this example we generated Calendar PMs for the next 1 day.

If you want a copy of this screen, click on the PRINT SCREEN. Click on the Print Work Orders button to continue with printing the PM work orders.

- If you wish, you can print the result screen by clicking on the PRINT SCREEN button. Also the Close Window button will close this window without running the PM work order report. You can always reprint the generated work orders from the Work Order module by querying on the newly generated PM work orders.

- Click on the Print Work Orders button to continue with printing of the PM work orders. The PM work order report will open in a new browser window.
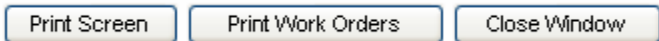
- Click on File and select Print from the drop down menu to proceed with printing.

5.5.3   Projecting PM's Into the Future

Web Work lets you look into the future and see the PM's that will generate so you can project the resources need to maintain your Assets.

- Follow the steps above for Generating PM's and when you get to the Generate step, click the ![Projection] button instead.

- A screen will open with all the PM's that would have generated if you clicked the Generate button as seen here.

- Click any record and to see the schedule on a calendar.

Click the Arrows beside Month to move forward or back a month.

### 5.5.4   Printing Individual PM Records

If you wish to print PM records, as opposed to the PM work orders you have generated, there are two ways to do so.   You can print an individual PM record currently displayed on the screen or a batch of PM records that you have selected and retrieved.

To print only the PM that is open on the screen:

- Retrieve a PM record. The selected record will open in edit mode.

- Click on the ⎙ button. The PM report comes up.

- Click on File and select Print from the browser drop down menu (as see here to the right) or click the Printer icon on the Standard Buttons toolbar of the browser to proceed with printing.
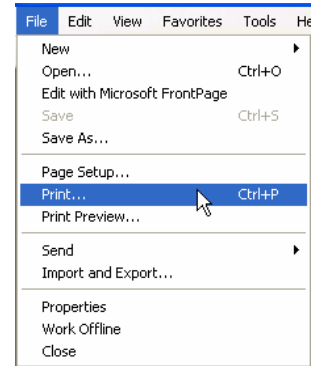
☞   Do not confuse this PM report with Work Order report. This report is NOT a work order; rather it shows the PM record information.

5.5.5   Printing Multiple PM Records

To print multiple PM's:

- Retrieve a group of PM records.

- Move the mouse over the Operations button and select Print Selected PM from the drop down menu. The PM report comes up, showing all selected PM records.

☞   Note that the PM report does not show page breaks. However when printed, each record is separated from the next by a page break.

- Click on File and select Print from the browser drop down menu (as see here to the right) or click the Printer icon on the Standard Buttons toolbar of the browser to proceed with printing.
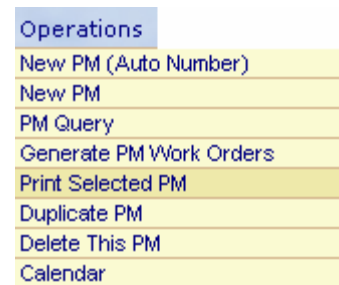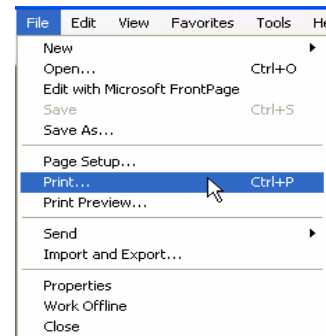
5.6   Show WOs (Work Orders)

The Web Work Show WOs feature will display a list of open work orders for a selected PM.

To show WOs:

- Retrieve a PM record

- Click the **Show WOs** tab.

- A screen similar to the one shown here comes up, showing the currently open work orders and relevant information.

Workorder #	Open Date	Target Date	Status
60	12/06/2003	4/1/2003	APPR
168	22/07/2005	7/1/2003	APPR
169	22/07/2005	10/1/2003	APPR
170	22/07/2005	1/1/2004	APPR
171	22/07/2005	4/1/2004	APPR
172	22/07/2005	7/1/2004	APPR
173	22/07/2005	10/1/2004	APPR
174	22/07/2005	1/1/2005	APPR
175	22/07/2005	4/1/2005	APPR
176	22/07/2005	7/1/2005	APPR

- Click on any of the records to open the Work Order Module and view the work order.

5.7   Nested PM

A nested PM is a PM with two or more procedures that get performed at different intervals. A nested PM can be used when you only want a single Work Order to generate at each interval.

For example, a nested PM can consist of three procedures, an inspection performed monthly, a minor service performed quarterly, and a major service performed annually. Every three months, the inspection and minor service are performed and every twelve months, all three procedures are performed. In other months, only the inspection is performed. Each month only a single PM work order is generated with the appropriate procedure or procedures.

Please see the Procedure Module Chapter under Using Procedures for important information on how to setup your procedures.

5.7.1   To Create a Nested PM:

- Refer to section 2.1 – Adding new PM records first.

- Click on the icon at the bottom right of the screen to enter into new mode.

- Leaving the Procedure field blank, enter the rest of the fields in the first section.

- Specify whether to "Generate PM Work Order Based On" – "Next Due" or "Complete PM" by clicking the radio button beside one.

- In the Interval field, enter the base interval, that is, the interval of the procedure that is performed most frequently. If your frequencies were every one month, three months and twelve months, you would enter one. Do NOT fill out any other fields in this section.

- Enter the Interval Unit. In our example this would be MONTH.

- Enter the next Due Date. This is the date the next PM Work Order will generate.

- Proceed down to the third section of the screen and enter any other assignment details like Account, Crew, Work Type, etc.

- Click on the [save icon] button at the bottom right hand side of the screen to save the PM Record

- Go to the menu at the top and click Nested PM Setup under Resources as seen here. This will launch the Nested PM screen.

- In the Nested PM screen, enter the Procedure and Interval it belongs to. Make sure that the first Interval is the same as the Interval you entered on the previous screen.

- If you have setup your procedures as nested then check the Nested Procedures checkbox. If you have comprehensive procedures then, leave the Nest Procedures checkbox unchecked. See the Procedure Module Chapter under Using Procedures for more details on Nested versus Comprehensive procedures.
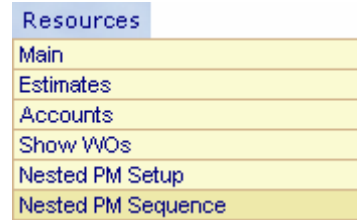
- Click on the [save icon] button to save the procedure to the PM.

- Click on the [sequence icon] button to view the PM sequence. The next section will explore the PM Sequence and making changes to it.
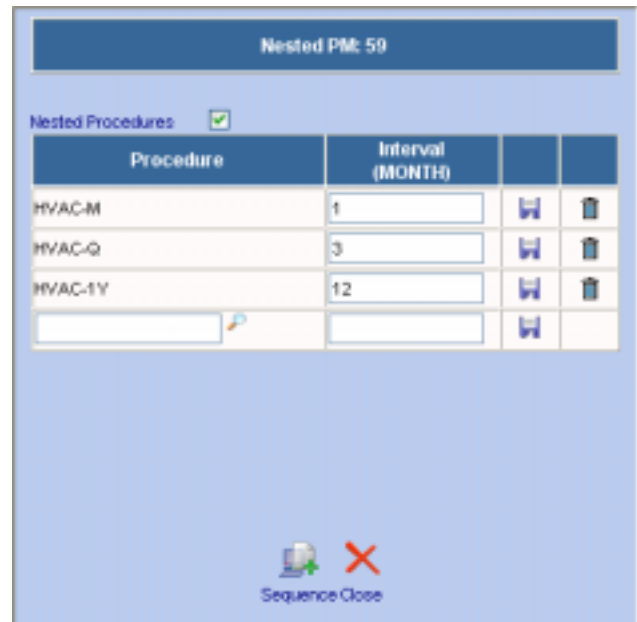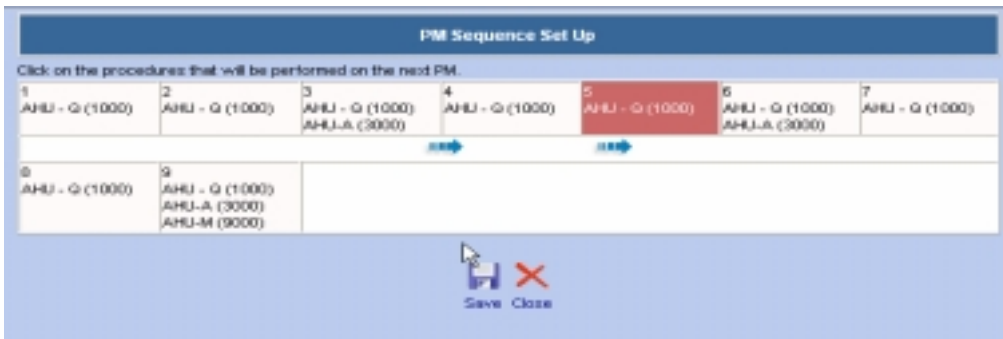
5.7.2 <u>To view the nested PM sequence:</u>

- Move the mouse over the Resources menu at the top of the screen and select Nested PM Sequence from the drop down menu.

- The PM Sequence Set up screen will be displayed. The sequence is numbered started at 1 and moving up from there.


- The highlight one is the procedure that will be performed on the next PM.

- To change the next due procedure (or set of procedures), click any other procedure and then the button.

5.8   PM Calendars

The PM module includes a calendar, which displays PM records due for future forecasting.

To view the calendar:

- Move the mouse over the Operations menu and choose Calendar from the drop down.

- A screen similar to the one pictured below will open:

,.
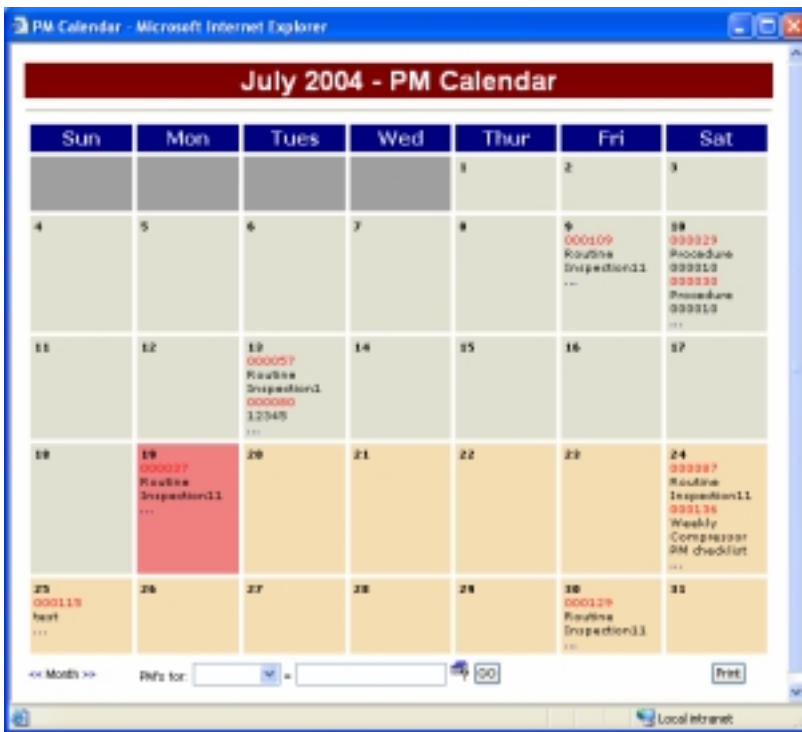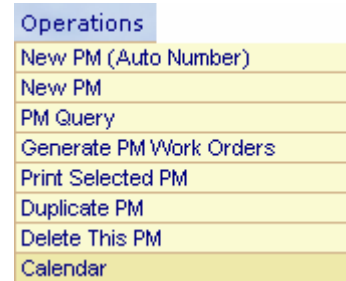
Click on " … " to view a full list of all PMs due that day.

Calendars can be filtered by Locations, Equipment, Craft, Crew, Manager or Employee.

Enter the code for the applicable selection or use the lookup button to pick from list and click on the GO button.

Click on the PRINT button to print the calendar.

- Click on the << and >> marks to change month view.

- Calendars can be filtered by Location, Equipment, Craft, Crew, Manager or Employee by choosing appropriate selection from the PM's for: drop down list. Enter the code for the applicable selection or use the lookup button to pick from list. Click on the GO button.

- Click on the Print button to print the displayed calendar to the printer.

- To view a detailed list of PMs for each day, click on the"**…** "button in any of the calendar squares. A screen similar to the one pictured below will open:

Daily Calendar

2004-Jul-10

Click on the Workorder for full details or to print

PM Num	Description	Location	Equipment	Priority
000029	Procedure 000010	SHOP	LANDROVER	HIGH
000030	Procedure 000010	SHOP	LANDROVER	HIGH

Select All

Back to Monthly Calendar

- To return back to the calendar, click on the **Back to Monthly Calendar** link.

- To retrieve an individual work order in the Work Order screen, click on the work order number.

- To retrieve all work orders shown in the Work Order screen, click on the **Select All** option.

The PM Calendar is read-only. To make changes to a PM schedule you must open the applicable PM record in Edit mode and make any applicable changes.

5.9   PM – Reports

To access PM reports

- Move the mouse over the menu and select Reports from the drop down menu.

Tools
Reports
Links

- Click on any of the Reports listed under Standard or Custom, to open them.
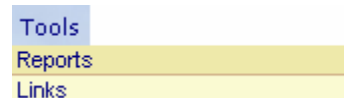
Only reports applicable to the PMs Module will be displayed. To view all reports, click on the REPORTS module button ⸙ Reports on the left hand side of the Web Work screen. For more information about reports, see the Reports section of this manual.