

Planned Maintenance Overview

The *Planned Maintenance* area allows you to set-up, view, and manage Planned Jobs and Schedules.

Planned Schedules must be set up for sites, locations, or assets (specifying an asset class). When creating a schedule, you will have the option to create the schedule for sites, locations, or assets:

Schedule Scope

Central - Available to all Sites, Locations or Assets

By Site, Location or Asset

(please select)

(please select)

By Site

By Location Within Site

By Asset

Multiple sites, locations, or assets can then be attached to the planned schedule. When a schedule has been created, Trackplan will automatically generate jobs for each asset / site / location based on the schedule. Once a planned job has been completed, a new job will be created as per the schedule.

Forms can also be attached to a planned schedule. In the *Planned Schedule Details* page, there is a *Forms* section where you can manage forms for this particular schedule:

Forms - Inspections, Risk Assessments etc

Add Form

Form Name

Form Category

Type

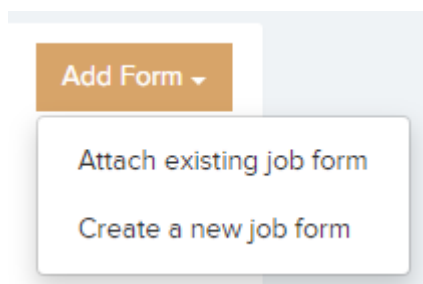
6 monthly checks (Incorporating
(M) & (3M) checks)

(C)

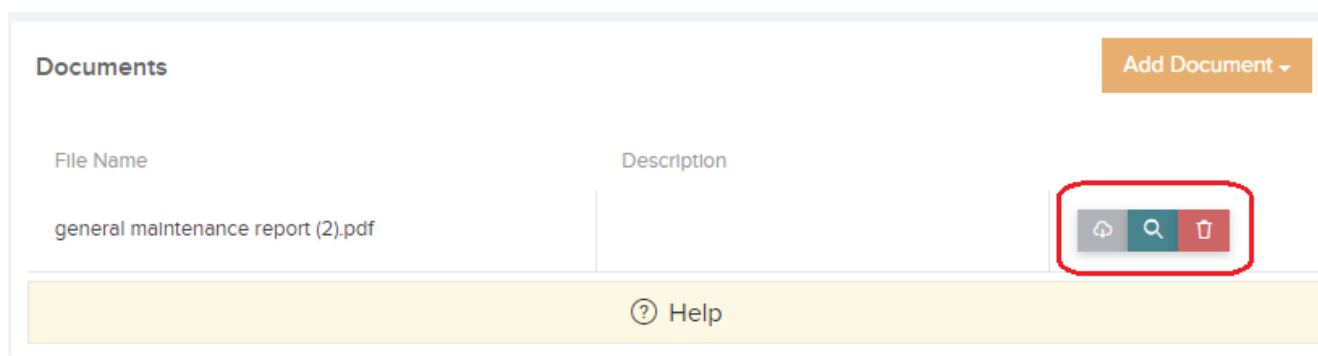
Inspection

DELETE

Selecting the *Add Form* button will allow you to choose between attaching an existing form, or creating a new form:



Documents can also be attached to a planned schedule. In the *Planned Schedule Details* page, there is a *Documents* section where you can manage Documents for this particular schedule:



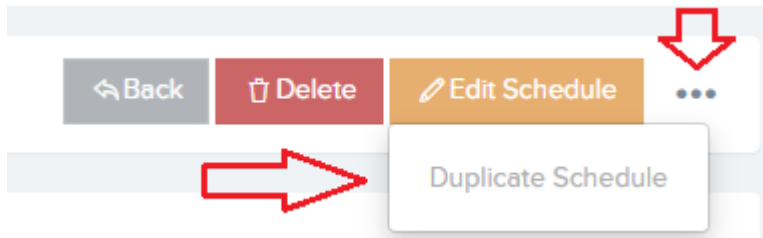
You can attached existing documents or upload a new document. Documents can then be downloaded, previewed or removed.

A user can Duplicate a Schedule from the Schedule Details page. As per screenshot below click on the triple dots and then 'Duplicate Schedule' . A pop-up will appear to give the new schedule a name, code and an option to active it or not.

New Schedule Name – Name of the duplicate schedule.

New Schedule Code – Code of the duplicate schedule. Code will not be duplicated from the original if left blank.

Is Activated – Check or uncheck to activate/disable schedule. This property is also not duplicated from the original.

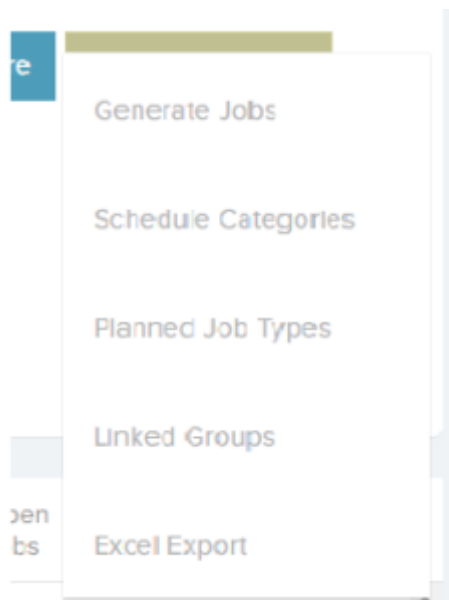


The *Planned Schedules* page will display a grid of all the planned schedules which can be organised by selecting the heading of the column which you choose to sort by. You can also filter the list by selecting the *Filters* button at the top-right of the grid, which will reveal a number of filtering options:

Schedule Category (please select)	Compliance Type (please select)	Schedule Group (please select)	Contract (please select)	Site (please select)
Scope <Scope - All>	Item Type <Item Type>	Location (please select)	Sub Location (please select)	Planned Job Type (please select)
Asset Class (please select)	Asset Sub Class (please select)	Assets (please select)	Resource (please select)	Frequency (please select)

Clear More New Schedule ...

Next to the *Filters* button are three dots, which when clicked, will reveal a drop-down with additional options:



- **Generate Jobs** – this will generate jobs from the existing schedules
- **Schedule Categories** – this will prompt the *Schedule*

Categories pop-up for you to add a new category, or edit / delete existing categories:

- **Planned Job Types** – this will prompt the *Planned Job Types* pop-up for you to add a new job type, or edit / delete existing types:
- **Linked Groups** – this will prompt the *Linked Groups* pop-up for you to add a new linked group, or edit / delete existing groups:
- **Excel Export** – this will export the planned schedules list to an Excel sheet.
- **Clear All Filters** – this will clear any filters that have been applied to the planned schedules grid.

Next to each schedule name in the *Planned Schedules* list is a green arrow that, when clicked, will display all sites / locations / assets allocated to this schedule:



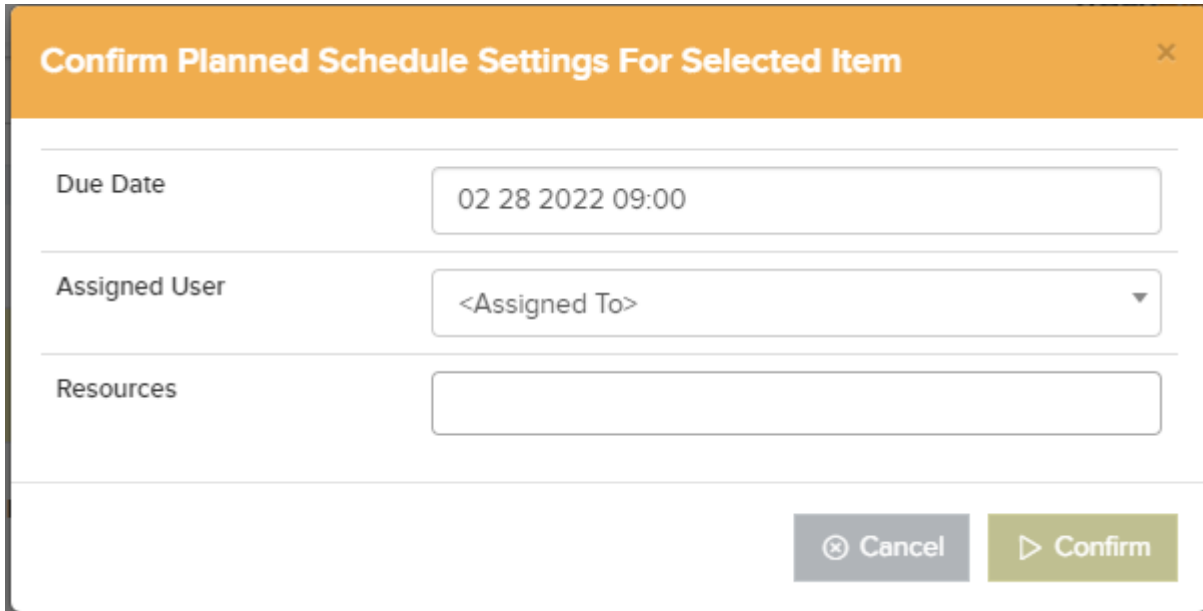
AC Units (C) No Statutory HVAC Annually Assets John Kite Central Facilities Manager 5 3											
Allocated Assets for AC Units <All Items> Default Settings Excel Export											
On	Asset	Contract	Site	Location	Assigned	Resource	Next Job	Due Date	Last Job	Completed	
<input type="checkbox"/>	AC Unit 234 15431	Capital Costs	Building No 15:36 14								
<input checked="" type="checkbox"/>	Air Conditioning Unit e178	Capital Costs	Building No 15:36 14	Floor 1	Facilities Manager	John Kite	2577 Instructed	05/03/2021 09:00			

Clicking the checkbox in the 1st column will activate

that Site, location or Asset to that schedule.

As per Screenshot above we can see that **Air Conditioning Unit** has been checked so it has been allocated to the Planned Schedule **AC Units**.

As per screenshot below once you click the checkbox you will have the opportunity to review and change Due Date, Assigned User & Resource.



A screenshot of a web application dialog box titled "Confirm Planned Schedule Settings For Selected Item". The dialog has an orange header bar with a close button (X) in the top right corner. Below the header, there are three input fields: "Due Date" with a text input showing "02 28 2022 09:00", "Assigned User" with a dropdown menu showing "<Assigned To>", and "Resources" with an empty text input. At the bottom right, there are two buttons: a grey "Cancel" button with a close icon and a green "Confirm" button with a play icon.

With Trackplan, you can set up groups to link planned schedules together so assets or sites added to one schedule will auto add to another. Also you can add supersede rules for smart scheduling.

Please note: Schedules must be of the same item type (site, asset or location) to exist within the same group. Also, if of type asset, they need to be in the same asset class.

The *Planned Maintenance Calendar* shows all jobs generated from planned schedules. The calendar can be ordered by day, week, month, agenda week, or agenda day. You can choose to show calendars based by date, user, or resource. You can also filter the calendar using various other filtering options to show only the information you are looking for.

The *Timeline Report* view of the *Planned Maintenance* area will allow you to generate a Gantt chart showing the current schedule status, future planned schedules and Resource / Site / Asset information. The report can be created to show month or week, and you can also specify the date you would like the report to start from.