Adding and Editing Schedules

- 1. Click the Preventive tab and navigate to the Schedules feature
- 2. To add a schedule, click the blue Add Schedule button in the top right corner of the page.

	Building 🔇	Preventive Maintenance							
-	Engines	Tasks Schedules Procedure Library				Actions 🗸			
+	Create Work Order	Search	Sort by	Status	Property Groups				
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08	Equipment								
251	Preventive	Status (4) 💿							
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3. Enter a name for the schedule and select an equipment category, equipment asset type, and a property from the respective drop downs. Click the blue Add Schedule button to continue.

Add Schedule	
Name	
Enter Schedule Name	
Equipment Category	
Choose a Category	~
Equipment Asset Type	
Property	

4. Select an assignee and frequency for the schedule from the respective drop downs.



5. Enter a start date

6. Under End, select whether you want the schedule to never end, end on a specific date, or end after a certain number of occurrences

7. Select when it is Due. You can choose a custom which will prompt you to enter a number of days for the service.

Ends		Due
Never	~	Custom 🗸
Never	•	Number of Days
On (Specific date)		Type Number of Days
After (# of occurrences)		

8. To Exclude Weekends, click the grey toggle. If the scheduled date falls on a weekend, it will be moved to the following Monday.



You can override the schedule for a specific piece of equipment by checking the box in front of that equipment on the grid and clicking Override schedule in the above popup. This allows you to change the start date and due by. Click Save when finished.



You can override the assignee for a specific piece of equipment by checking the box in front of that equipment on the grid and clicking Override Assignee in the above popup. Click Save when finished.

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	Included	Equipment	Location	Asset	Tag	Serial Number	Next Run	Start Date	Due	Assigned To
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Procedun	es									
							Inac	tivate	Save	Activate Schedule

9. Click the circle in front of Use Procedure library to select a procedure from your account library. Enter the procedure ID, estimated labor time, any notes, or parts needed for the procedure.

Procedures	
Use Procedure Library Custom Procedure	
Procedure Library	
Choose From Library	
Procedure Id	Notes
Estimated Labor	Parts
Steps	
	Inactivate Save Activate Schedule

OR

Click the circle in front of Custom Procedure to enter a custom set of procedures for the schedule. You can enter estimated labor time, notes and parts.

Procedures	
Ute Procedure Library C Custom Procedure	
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0 Hours	
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Enter Text	
Parts (Optional)	.
Enter Text	
Simple Steps	
Enter steps to perform this procedure	
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Click Simple Steps to enter one list of steps to perform the procedure OR Click Individual Steps to add each step to the procedure with the ability to check them off as you complete.

10. When finished, click Save at the bottom of the page to save your changes and keep the schedule in the draft stage, OR click the Activate Schedule button at the bottom of the page to save and set the schedule to begin at your chosen start date.

11. To edit schedules, find a schedule in the schedules grid you would like to make changes to. Scroll to the Actions column on the right of the grid and click View in the row of your chosen schedule.

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Make any changes to the fields and click the save or activate schedule buttons at the bottom of the page. Save keeps the schedule as a draft, while Activate Schedule sets the schedule to run on its given start date.

Click Inactivate at the bottom of the page to stop running the schedule.

Inactivate	Save	Activate Schedule