ProjectVIEW ERP
Cost Monitoring Solution

Machinery Maintenance

This section describes the functionality of the Machineries Maintenance in ProjectVIEW

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1 Introduction

ProjectVIEW offers a variety of options regarding machinery maintenance. In order to properly use this feature, the setup explained below is required.

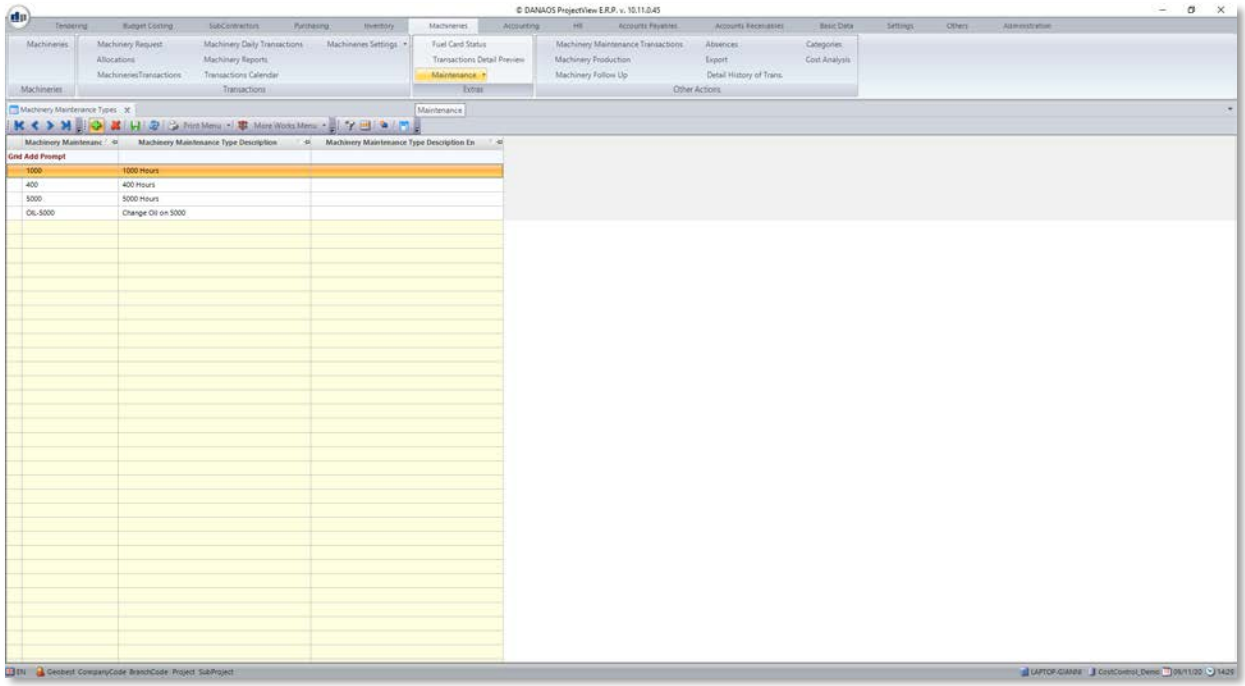
2 Maintenance setup

Before using the maintenance sub module, the information described in this chapter needs to be provided. This is mostly done at the initial setup of the system but can also be done or amended at a later stage.

2.1 Create Maintenance Types

To view a list of the machinery maintenance types, the user must navigate to:

"*Machineries*" > "*Extras*" > "*Maintenance*" > "*Machinery Maintenance Types*"

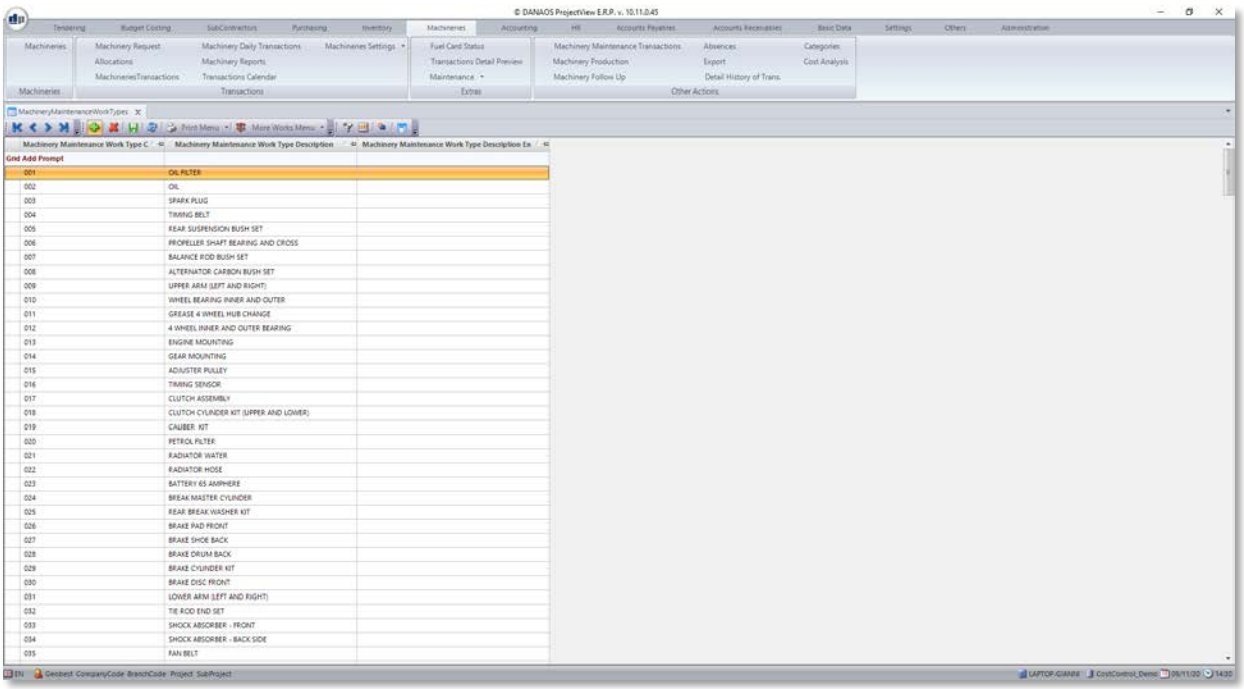


These are all the types of maintenance a machinery needs to undergo. These should be recurrent.

2.2 Create Maintenance Work Types

To view a list of the machinery maintenance work types, the user must navigate to:

"*Machineries*" > "*Extras*" > "*Maintenance*" > "*Machinery Maintenance Work Types*"

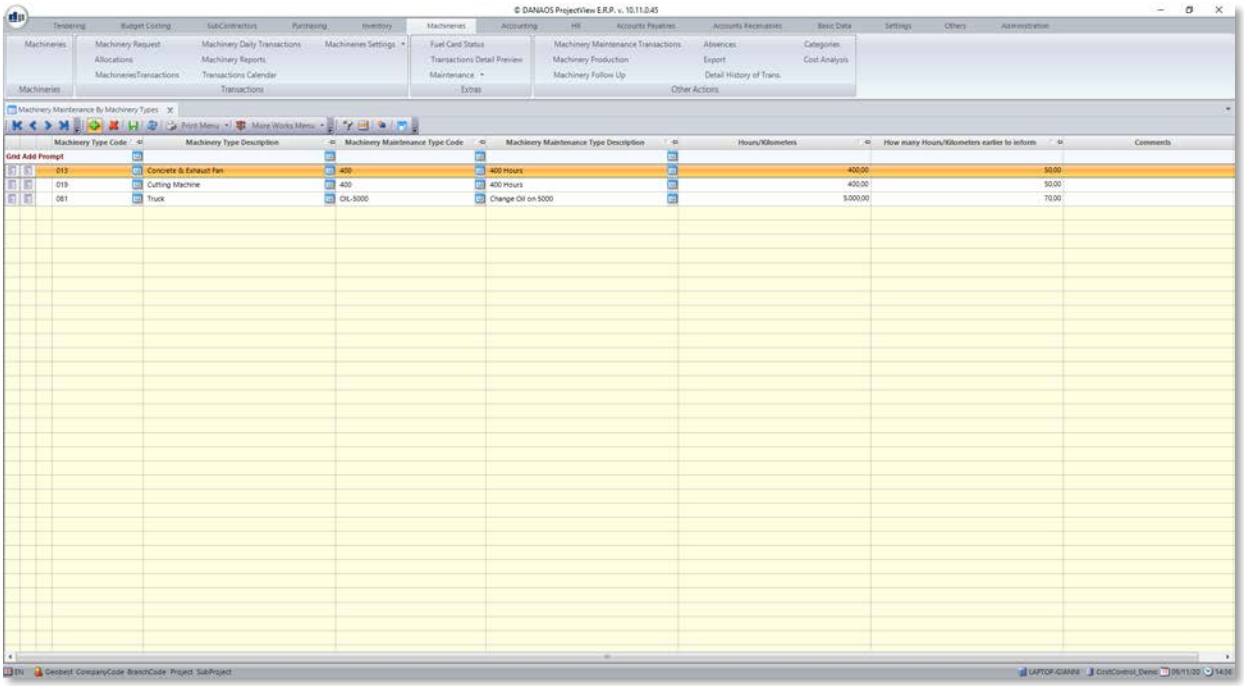


Every time a machinery undergoes a maintenance, a number of jobs need to take place. This grid lists all these.

2.3 Assign Machinery Types to Maintenance Types

At this stage, a list must be created with all the maintenance types each machinery type needs. To do so, the user must navigate to:

"*Machineries*" > "*Extras*" > "*Maintenance*" > "*Machinery Maintenance By Machinery Types*"



Each line includes:

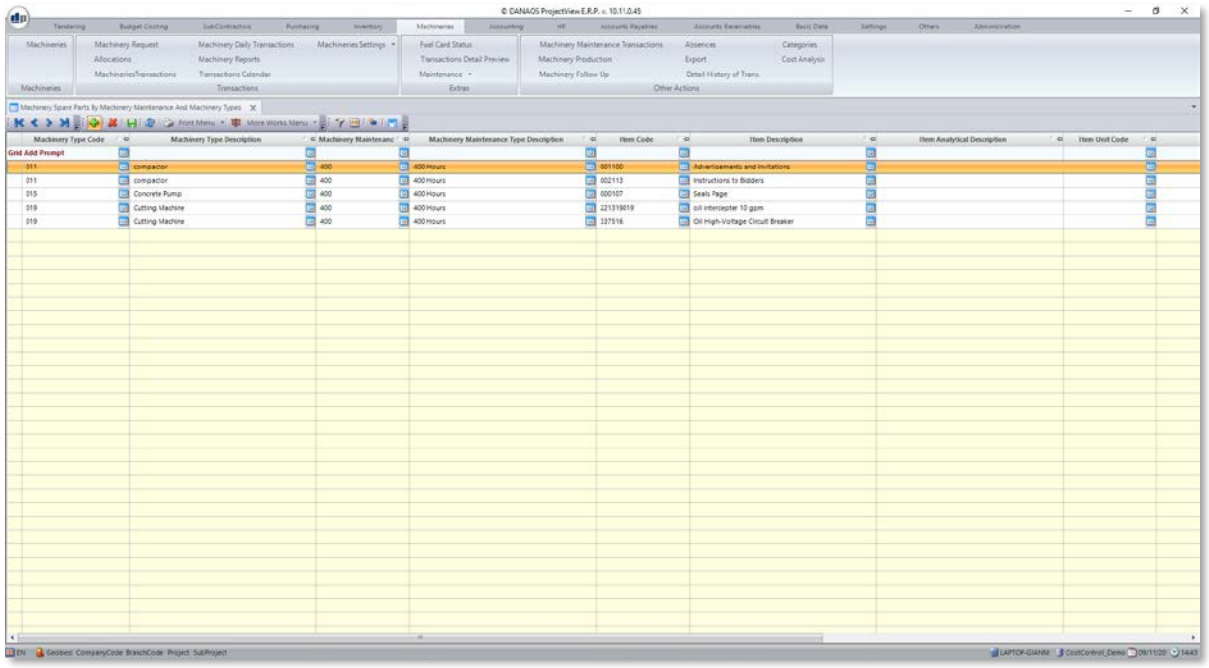
- ✓ The machinery type
- ✓ The maintenance type associated with that machinery type
- ✓ The Hour/Kilometer interval between each successive maintenance of this type
- ✓ How many Hours/Kilometers in advance should a notification be sent by the system

Each line has two identical buttons on the left:

The first one allows the user to assign spare parts to a maintenance type.

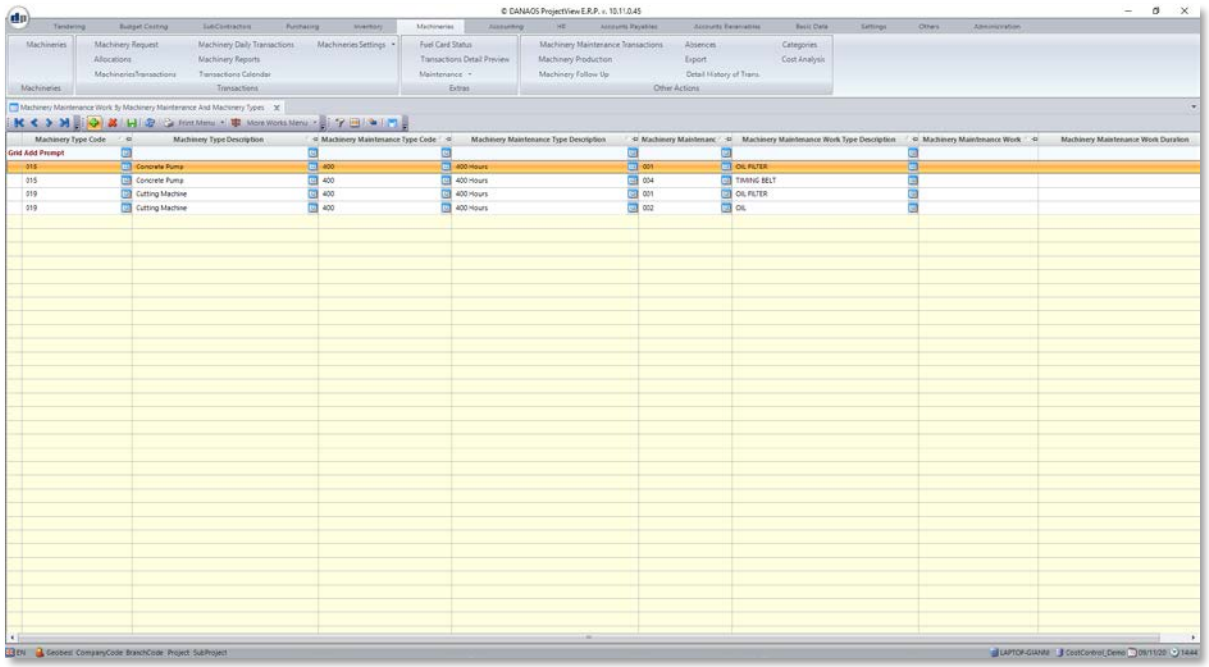
The second one allows the user to assign maintenance works to a maintenance type.

2.3.1 Assign spare parts



Using this grid, the user can assign the spare parts needed for this specific maintenance type and machinery type.

2.3.2 Assign maintenance works

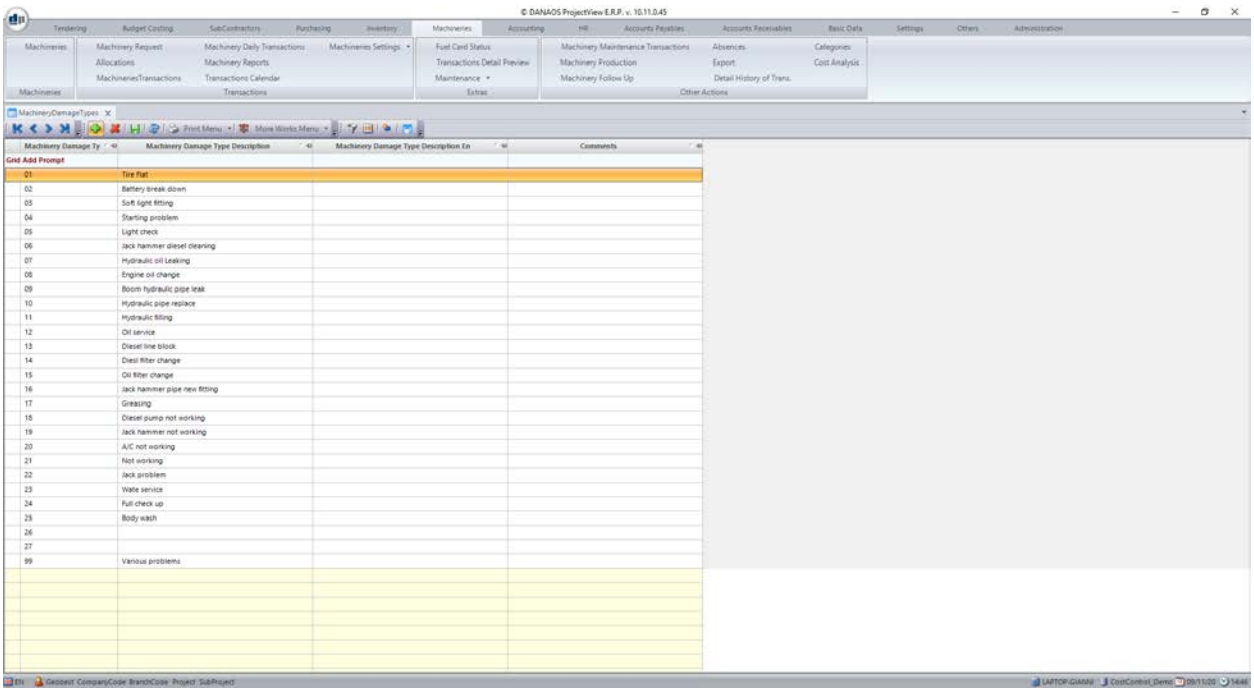


Using this grid, the user can assign the maintenance works that need to take place during this specific maintenance type and for this machinery type.

2.4 Create Machinery Damage Types

To view a list of the machinery damage types, the user must navigate to:

"*Machineries*" > "*Extras*" > "*Maintenance*" > "*Machinery Damage Types*"



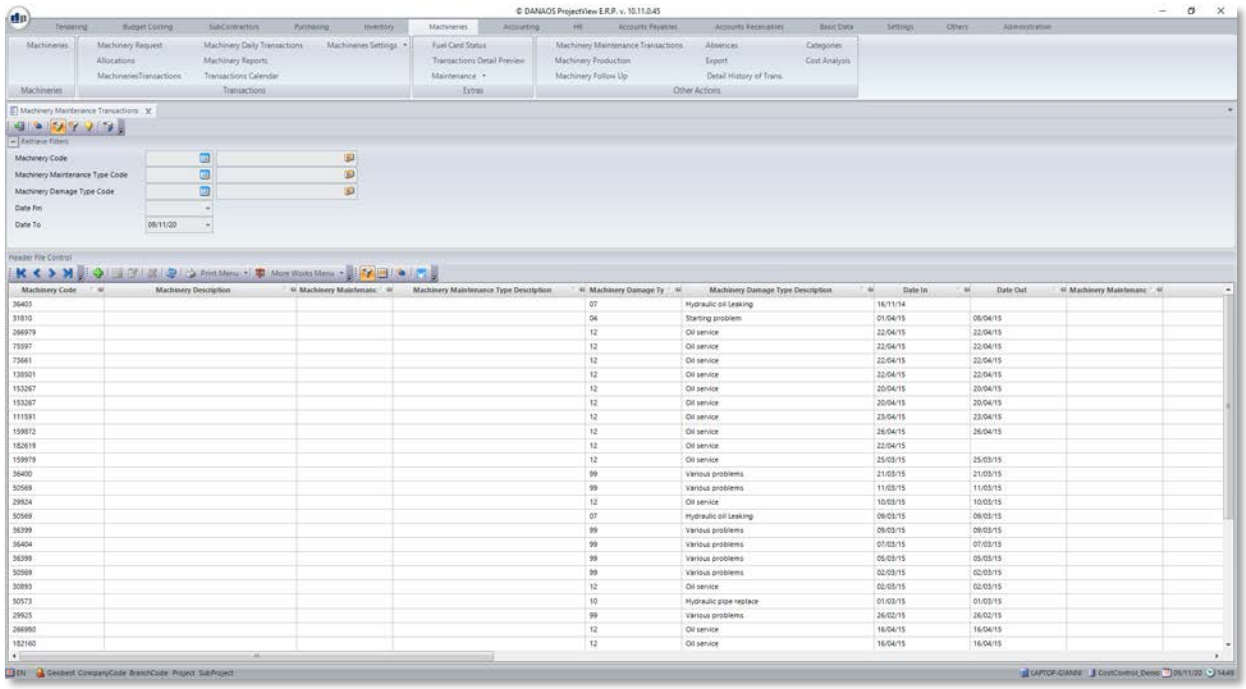
These are all the types of damage a machinery could face.

3 Maintenance Transactions

Machinery transactions are created every time a maintenance needs to take place.

To view a list of the maintenance transactions, the user must navigate to:

"*Machineries*" > "*Other Actions*" > "Machinery *Maintenance Transactions*"



Editing or creating a new item will display the maintenance transaction form.

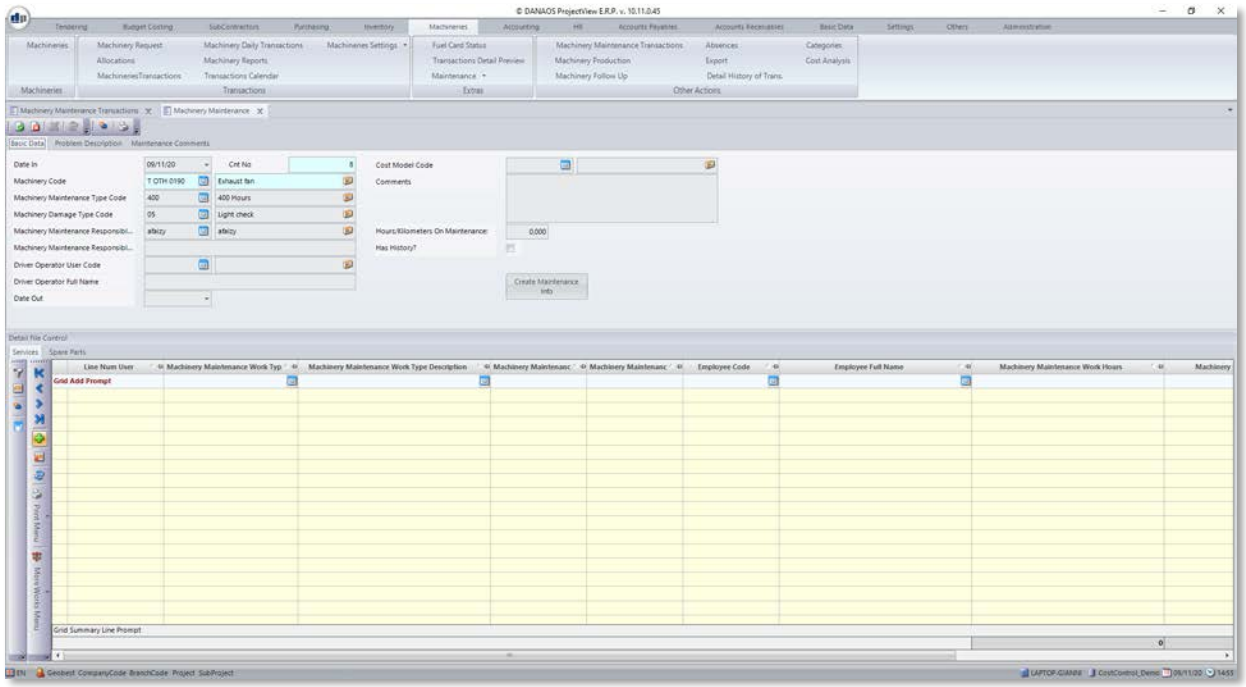
Note

Maintenance can take place for two reasons:

- ✓ Due to a scheduled maintenance
- ✓ To repair damage to a machinery

3.1 Create a maintenance transaction

This form is displayed when a new maintenance transaction is created or when an existing one is edited.



The mandatory fields are:

- ✓ Date In
- ✓ Machinery Code
- ✓ Machinery Maintenance Type Code (if this is a scheduled maintenance)
- ✓ Machinery Damage Type Code (if this is for a damage repair)

It is recommended that "*Hours/Kilometers On Maintenance*" should also be set, to log the actual hours/kilometers at the time of maintenance.

If needed, the problem description and maintenance comments can be added by using the relevant tabs.

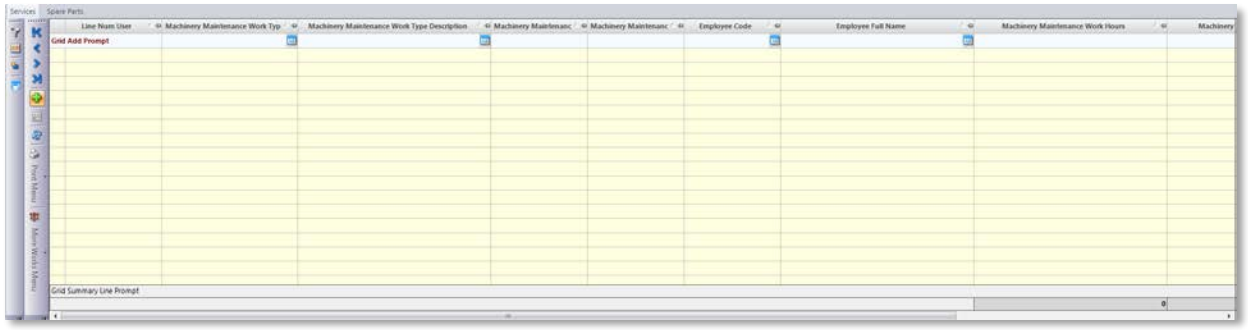
Having provided the above, the user must save.

3.2 Add maintenance works or spare parts

If this is a scheduled maintenance, the user can click on the "*Create Maintenance Info*" button. This will use the information in the system (See. Maintenance setup) to fill the grid with both the necessary works and spare parts needed. More works or spare parts can be added manually.

If this is for a damage repair, the works and spare parts must be entered manually.

To switch between maintenance works and spare parts, the user can use the grid tabs (found on top of the grid).



After any changes, the user must save.

3.3 Add PIC and date out

The final two steps are:

- ✓ Add the person responsible for the maintenance by using the "*Machinery Maintenance Responsible User Code*" field
- ✓ Add the date the maintenance ended by using the "*Date Out*" field.

After any changes, the user must save.

3.4 Maintenance request via Web

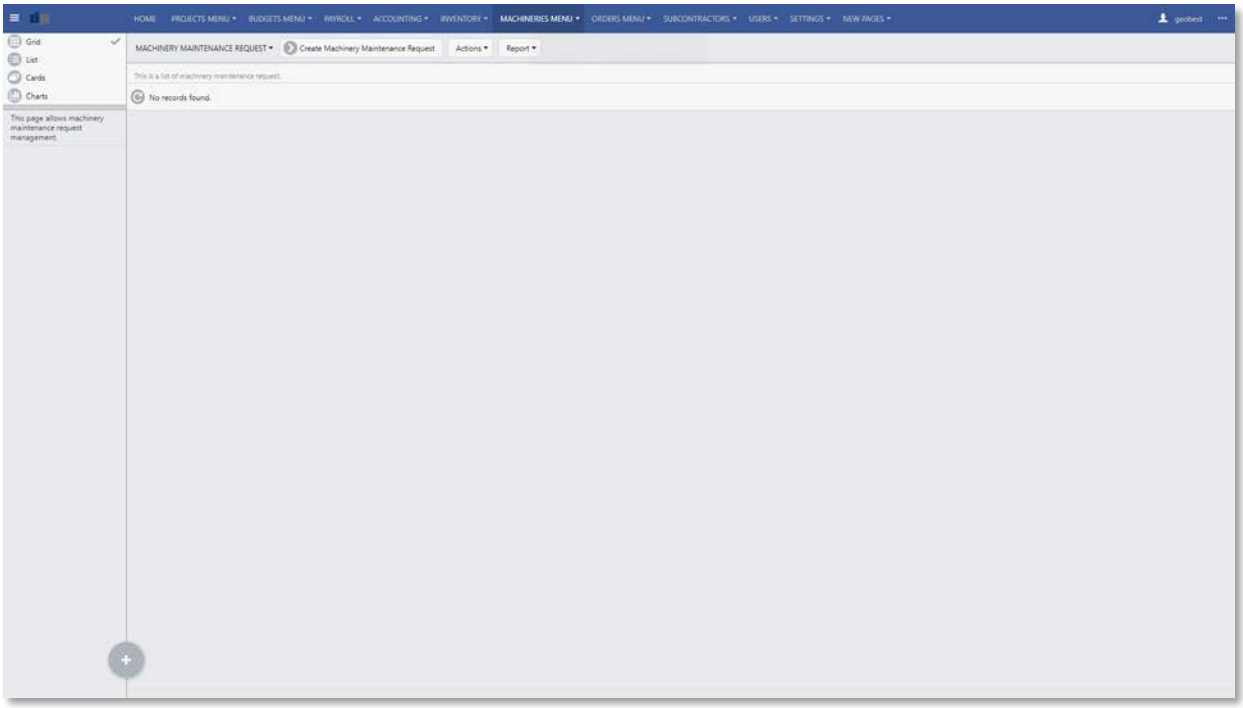
Everything that has been discussed so far is done through the desktop client version of ProjectVIEW. However, a user can create a maintenance request from the site as well using the web version of the system.

3.4.1 Create a machinery maintenance request

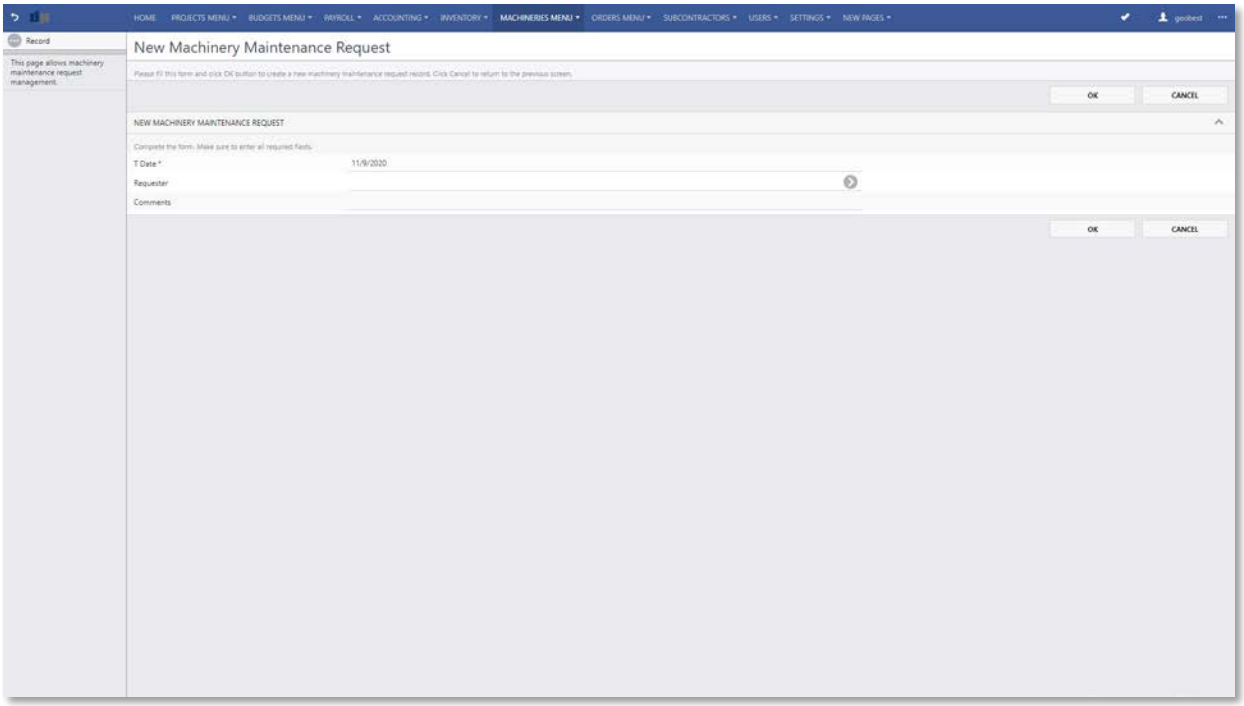
To create a maintenance request in the web version, the user has to navigate to:

"*MACHINERIES MENU*" > "*Machinery Maintenance Request*"

This will display a grid with all the maintenance requests:



Clicking on the "+" button on lower let part of the screen creates a new maintenance request.



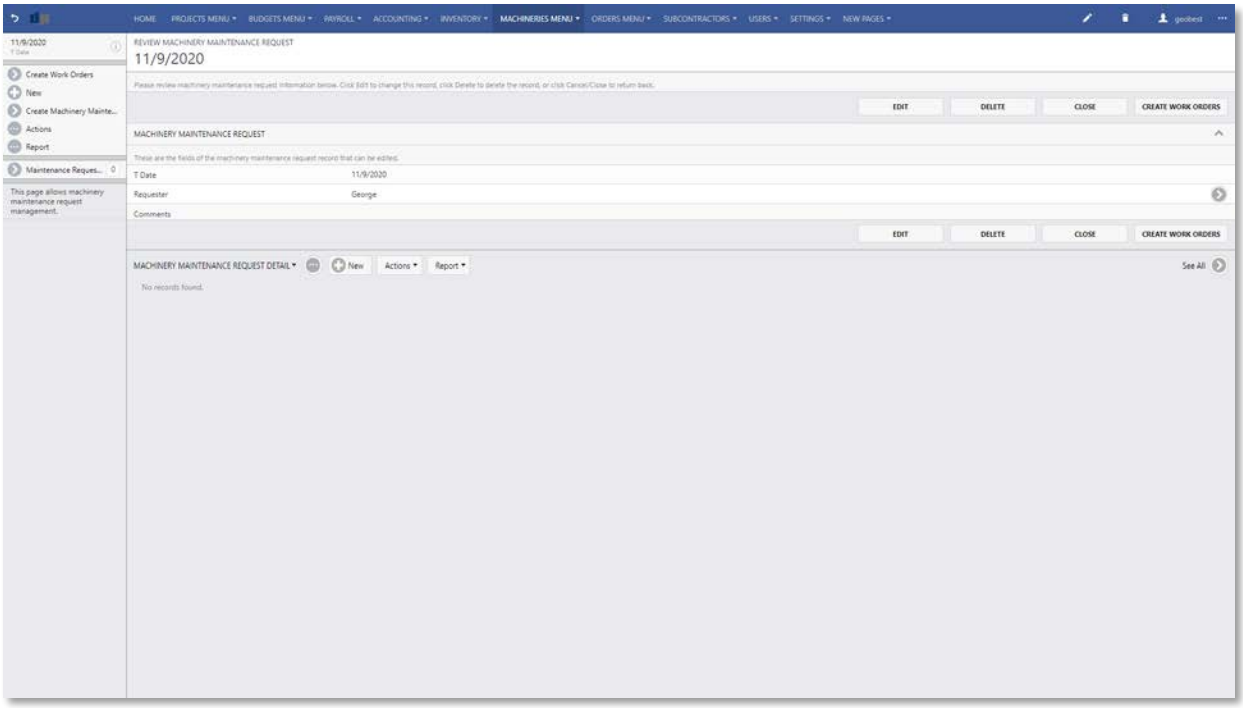
The following fields are mandatory:

- ✓ T Date
- ✓ Requester

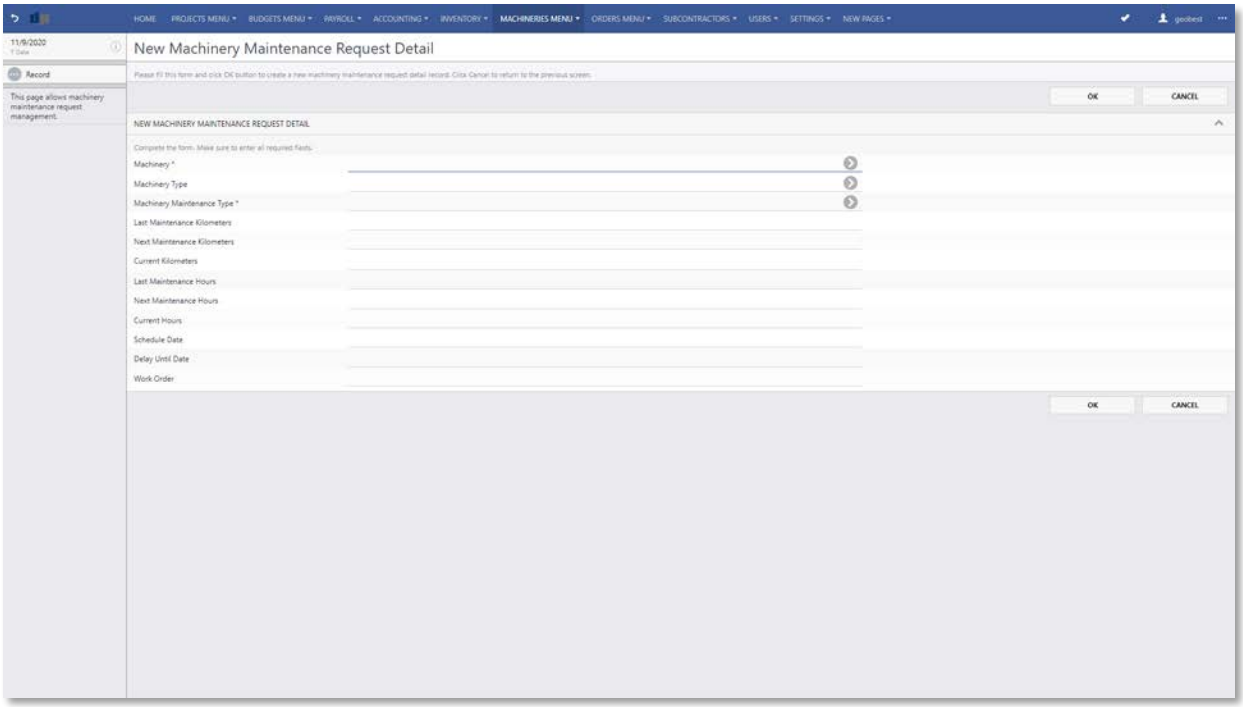
Having added the above, the user must click on the "*OK*" button.

3.4.2 Add machineries to the maintenance request

The next screen allows the user to add the machineries he wants or to edit the existing ones:



To add a new item, the user has to click on the "*NEW*" button, which will display the following form:



The mandatory fields are the following:

- ✓ Machinery
- ✓ Machinery Maintenance Type

Having done the above, the user must click the "*OK*" button.

The desktop client version will automatically sync with the web one and the users will now be able to review the maintenance request in the system.

4 Appendix – Machinery Settings

There are various fields in the machineries, which use predefined codes. These are:

- ✓ Garages
- ✓ Machinery Expenses Types
- ✓ Car Traffic Licenses
- ✓ Car Technical Check
- ✓ Machinery Types
- ✓ Machinery Status
- ✓ Machinery Locations
- ✓ Gearbox Types
- ✓ Capacity Types
- ✓ Fuel Types
- ✓ Lubricant Types
- ✓ Fuel Card
- ✓ Fuel Card Usage Types
- ✓ Car Insurance Types
- ✓ Machinery Analytical Characteristics

To view/add/edit the above, the user has to navigate to:

"*Machineries*" > "*Transactions*" > "*Machinery Settings*" > …

and then choose the appropriate item from the list.

In case of any queries or support issues, please contact us:

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