

Working with Maintenance

ACCESSING THE MAINTENANCE MODULE

There are three main tasks to perform in the setup of the maintenance schedule:

- 1) Verify vehicle information is correct;
- 2) Setup service categories;
- 3) Create service schedules.

1. To access the Maintenance module, from the main toolbar, click the **System** icon -> **Configuration** -> **Fleet Configuration**.

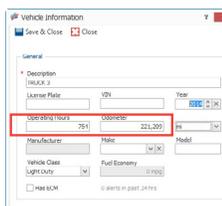


VERIFYING VEHICLE INFORMATION

2. Under the **Maintenance** section, located at the bottom of the left hand panel, click **Vehicle Information**.



3. Verify the **Odometer** reading / **Operating Hours** are accurate. To update the information, highlight the asset and click **Edit**, make the updates and then, click **Save & Close**.



SETTING UP SERVICE CATEGORIES

1. Still under the Maintenance section, click **Maintenance Categories**, to create maintenance categories under which to group your service schedules.



2. Select **+ Add** and name your Service Category.

3. Click **Save & Close**.



CREATE SERVICE SCHEDULES

4. Remaining under the **Maintenance** section, click **Maintenance Schedules** to create the required service schedules.



Types of Maintenance Schedules

There are seven types of service schedules to choose from. The table below explains what they are.

Parameter	Description
Unscheduled	Occurs only once, not planned.
Annual	Occurs routinely, every year (specify the month and date on which the service is required)
Recurring Date	Occurs routinely, every x weeks or months
Fixed Odometer / Operation Hours	Occurs just once, when the asset reaches a specific number of operating hours or odometer reading
Rolling Odometer/ Operation Hours	Occurs routinely, whenever the asset reaches a specific number of operating hours or Odometer reading
Fixed Date	Occurs just once, on a specific date (specify exact date)
Recurring Date or Rolling	Occurs every x km/mi/hour OR every x days/ months (whichever comes first)

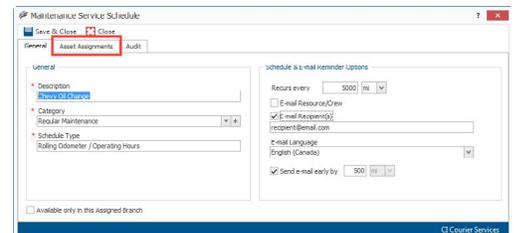
1. Click **+ Add**, located on top left corner of the screen.

2. In the **General** tab, enter in the **Description** and choose the **Category** from the drop down list.

3. Set the **schedule** of when you would like the service to occur. Also, choose who you want to be **notified** (Resource/Crew, and/or Recipient(s)), by entering in their email address(es).

⇒ To include 2 or more email addresses, separate these with a semi-colon (;).

4. Click the **Asset Assignment** tab, and then select the asset(s) to assign to this service schedule by placing a check mark next to the asset.





→ For the first maintenance cycle, you may need to adjust the details in the last column (by clicking in each of the fields), to reflect the actual required **Next Date** or **Odometer** reading to reflect your asset's current maintenance reality.

Asset	Asset Type	Branch	Current Odometer	Last Odometer	Next Odometer
adys asset	TRUCKS	CI Courier Services	79 km	500 km	523,000
adys asset	My Fleet (Default)	CI Courier Services	0 km	0	
Andres	My Fleet (Default)	CI Courier Services	0 km	0	
Brandon	Vaughan Fleet	CI Courier Services	0 km	0	
Chris Mobile	My Fleet (Default)	CI Courier Services	0 km	0	
Starlane Brampton	Brampton Fleet	CI Courier Services	0 km	0 km	7745 km
Starlane Mississauga	Mississauga Fleet	CI Courier Services	3000 km	0 km	3015 km
Starlane Toronto	Toronto Fleet	CI Courier Services	0 km	0	
Starlane Vaughan	Vaughan Fleet	CI Courier Services	20000 km	0 km	21000 km
Stephen's Asset	My Fleet (Default)	CI Courier Services	0 km	0	

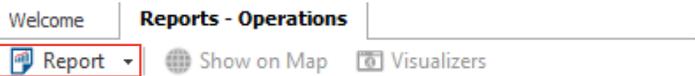
5. Click Save & Close .

MAINTENANCE REPORT

1. To access the **Maintenance** report, from the main toolbar, click the **Reports** icon.



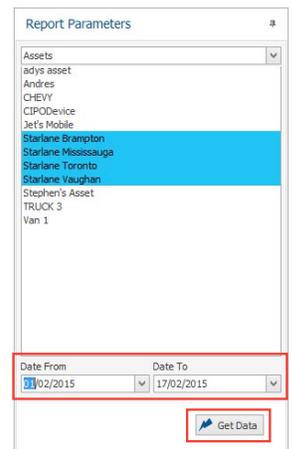
2. On the left side of the **Reports - Operations** screen, click the **Reports** button -> **Fleet** option. Then, from the list, select **Maintenance**.



3. From the **Report Parameters** panel to the left, select the assets and date range you want to include in your report.

4. Click on the bottom right of the panel.

Result: *The Maintenance report displays maintenance items of all statuses for the specified assets and date range.*



E-mailed To	Asset Type	Asset	Category	Service Schedule	Service Date	Status	Odometer
CI ;	Vaughan Fleet	Starlane Vaughan	System Non-Scheduled	Safety Inspection	12/02/2015	Open	0 KM
CI ;	Toronto Fleet	Starlane Toronto	System Non-Scheduled	Safety Inspection	12/02/2015	Open	0 KM
CI ;	TRUCKS	CHEVY	Regular Maintenance	Chevy Oil Change	12/02/2015	Completed	5000 KM
CI ;	My Fleet (Default)	Andres	System Non-Scheduled	Safety Inspection	12/02/2015	Completed	6000 KM
CI mail@example.com;	TRUCKS	TRUCK 3	Break Inspection	Rear Breaks	12/02/2015	Open	0 KM

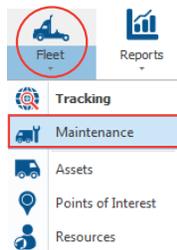
WORKING WITH MAINTENANCE ITEMS

Once the Maintenance schedules are setup, you need to update the **Maintenance Items** generated by their related **Maintenance** schedule, regularly.

1. To access the **Maintenance Items**, from the main toolbar, click the **Fleet** menu -> **Maintenance** option.

2. Select the maintenance item that you want to update, and click Edit .

3. In the **Maintenance Item** window, change the status from **Open** to **Completed**, enter the Service date, Cost, and Comments as relevant.



4. Click Save & Close .

→ The **Filter** icon, located to the right of the **Status** header, allows you to filter the maintenance items by status, ensuring you only see items that have a specific status, for example **Opened**. To remove the filter, click the **X** on the bottom left hand corner of the screen.