

3.0 Preventative Maintenance (PM) Work Order SETUP

Once the Basic Setup is complete, you can begin to add/schedule your PM work orders. The following sections describe how to add, edit and delete PM work orders.

A user can filter any work order by equipment or location type, status, work category and by resources assigned to the work order.

3.1.1 Add PM Work Orders

The following steps explain how to add a new PM Work Order to Hippo:

1. Click the **PM WOs** tab in the **Admin** section.
2. Click **Add Equipment Work Order** or **Add Location Work Order** sub-menu item to display the Add PM Work Order window (See Figure 38).

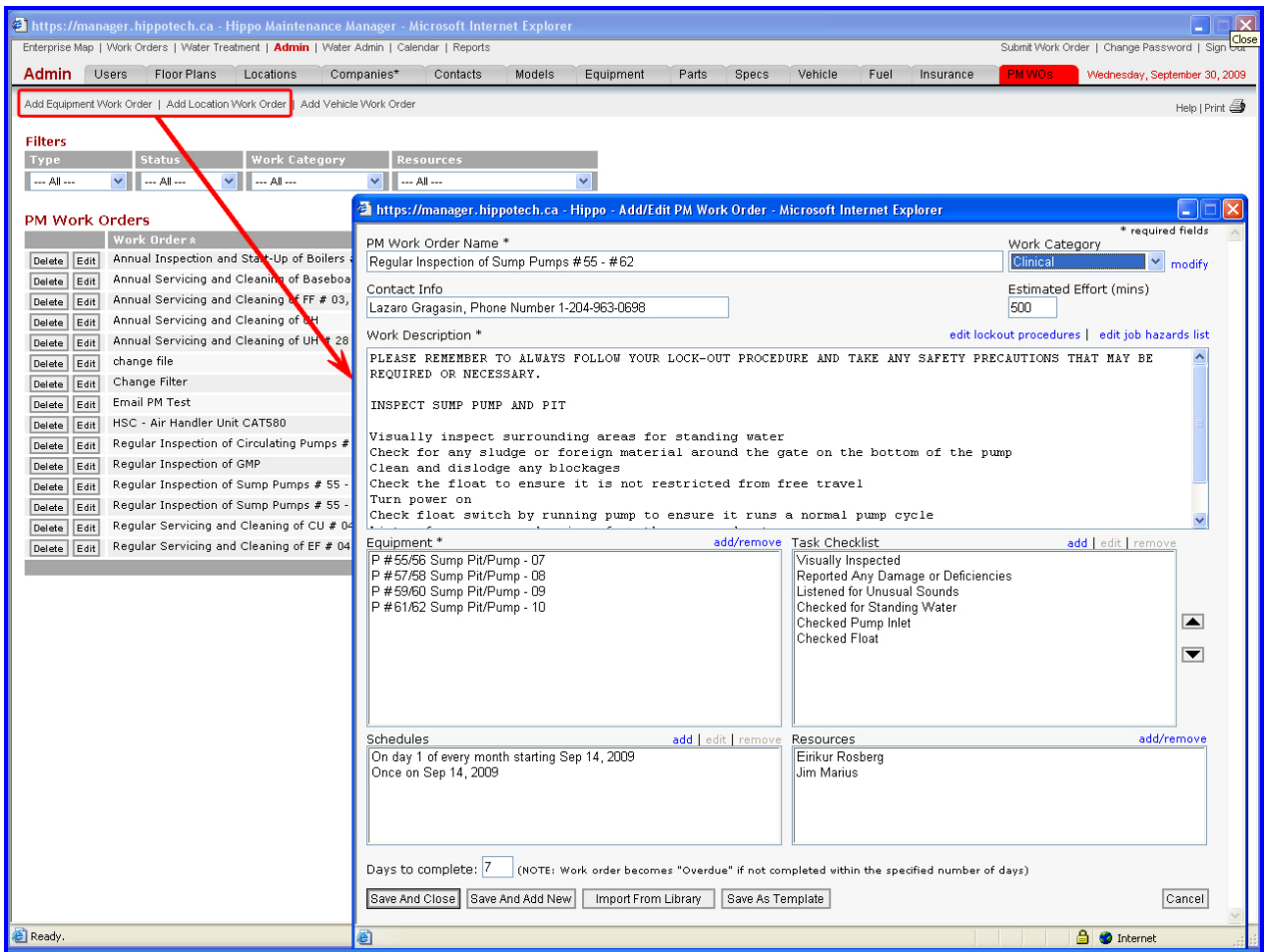


Figure 38: Adding Work Order

3. Enter/select the following *required* information:
 - a. PM Work Order Name
 - b. Work Description (details of the work to be done)

- c. Equipment OR Locations (depending on whether you are adding an equipment OR a location PM Work Order)
 4. If desired, you can enter/select the following *additional* information:
 - a. Work Category (select from the list OR click **modify** to add new category)
 - b. Lockout Procedures (click the **edit lockout procedures** to edit this work order's lockout procedures (See Figure 39))

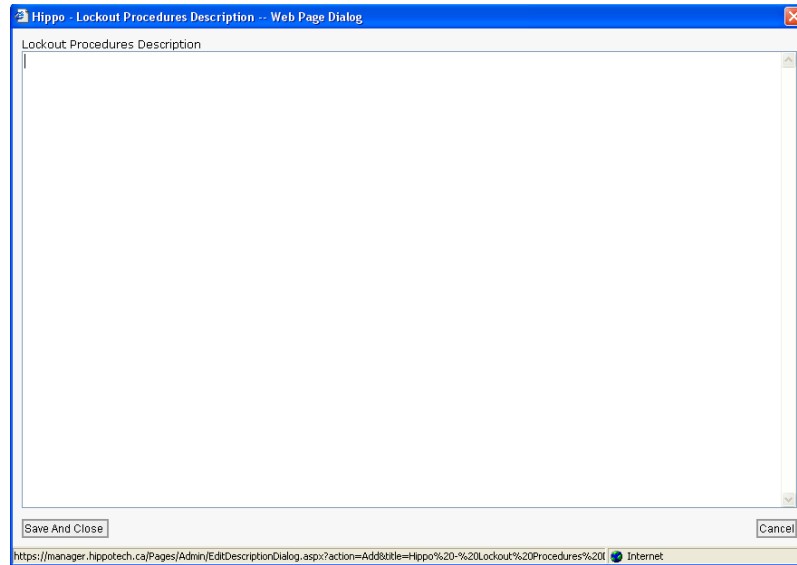


Figure 39: Lockout Procedure Description

- c. Job Hazard List (click the **edit job hazard list** to edit this work order's job hazard list (See Figure 40))

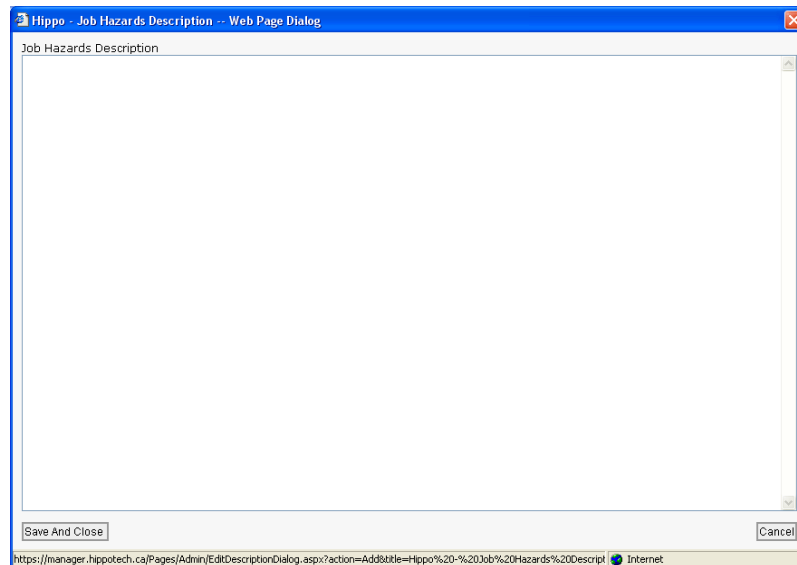


Figure 40: Job Hazards Description

- d. Schedules (identifies how often the work order will be generated (See Figure 41))
- i. To add a new schedule:
 1. Click **Add** button to open the Schedules window.
 2. Design the desired schedule.
 3. Click **Save And Close** button when finished.
 - ii. To edit an existing schedule:
 1. Select the desired schedule from the list and click the **Edit** button to open the Schedules window.
 2. Make the desired changes.
 3. Click **Save And Close** button when finished.
 - iii. Deleting an existing schedule:
 1. Select the desired schedule from the list.
 2. Click the **Delete** button.
 3. Click **Yes** to confirm the delete.

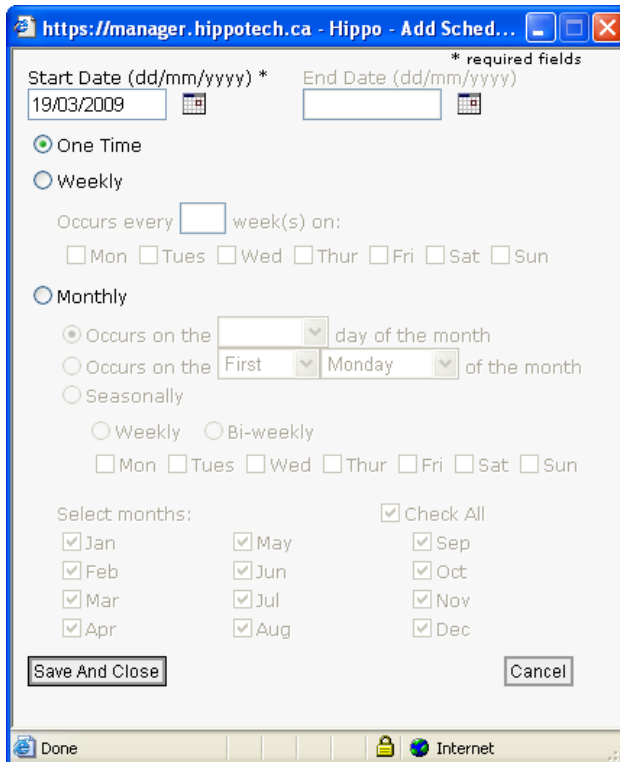


Figure 41: Schedules

- e. Tasks (select from the list OR click **add task** to add a new task (See Figure 42))
- NOTE:** The selected tasks are displayed as a list of check boxes to be completed when the work order is generated.

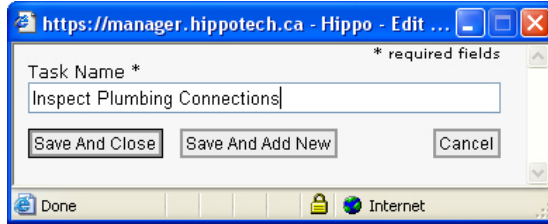


Figure 42: Task

- f. Resources (select the resources that will automatically be listed on the work order (See Figure 43))

NOTE: The resources list displays all users who have been identified as Work Order Resources in the Security Permissions window.

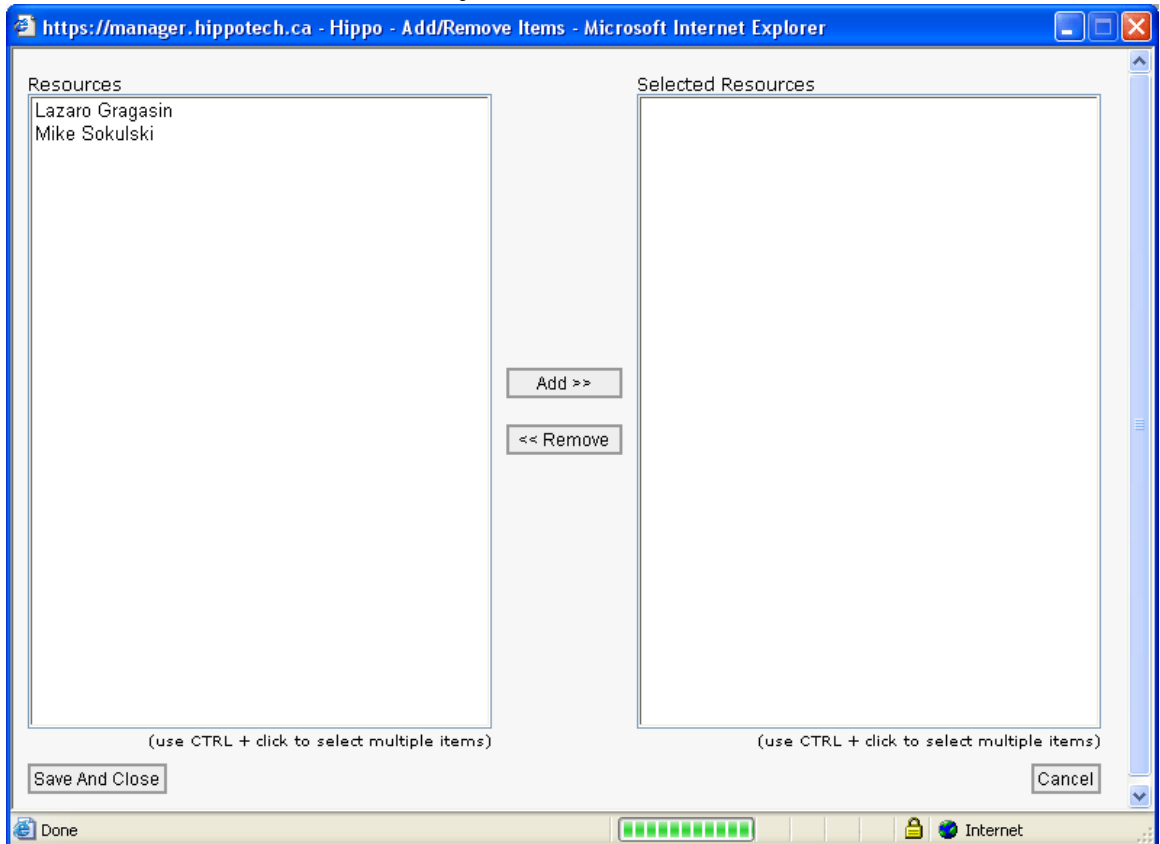


Figure 43: Adding Resources

- g. Generate Work Order # days before due date (specifies how long maintenance staff have to complete the work order before it becomes overdue)

3.1.2 Edit PM Work Order

The following steps describe how to edit an existing PM Work Order:

1. Click the **PM WOs** tab in the **Admin** section.
2. Click the **Edit** button beside the PM work order you want to edit to bring up the Edit PM Work Order window (See Figure 44).

3. Edit the desired information.
4. Click the **Save And Close** button when finished.

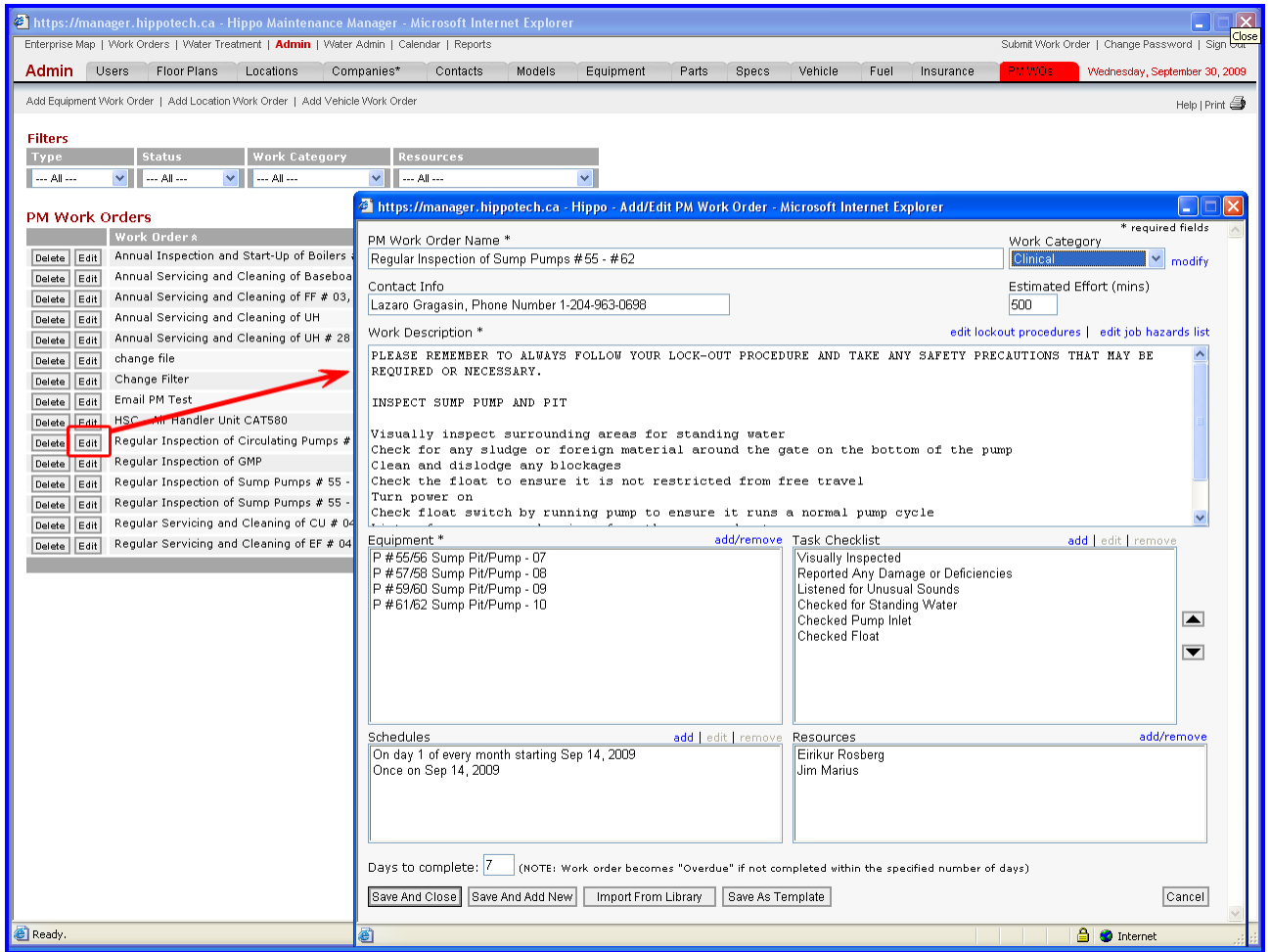


Figure 44: Edit PM Work Order

3.1.3 Delete PM Work Order

The following steps describe how to delete an existing PM Work Order:

1. Click the **PM WOs** tab in the **Admin** section.
2. Click the **Delete** button beside the PM work order (schedule) that you want to delete (See Figure 45).
3. Click **yes** when asked to confirm the delete.

NOTE: The PM Work Orders table displays a separate row for each schedule and, therefore, to delete a PM Work Order entirely, you will have to delete each schedule one-by-one.

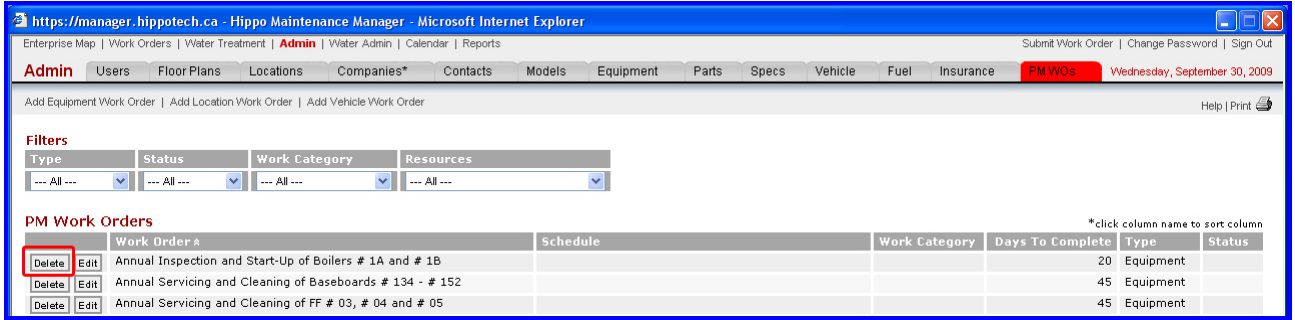


Figure 45: Delete PM Work Order