



Maintenance Contract Tasking
Webinar
August 2010



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Overview

This webinar will review the basics required to set up the tasking and items required to provide preventative maintenance service on a component covered by a maintenance contract.

The components and the associated tasking and items can be printed on the Tasking Service Order and distributed to the technicians so that they know what tasks need to be completed and also the items required such as filters. The tasking will also be accessible using the Ascente Mobile Pro module.

Objectives

- Setup:
 - Labor Grades
 - Tasks
 - Equipment
 - Components
 - Component Tasking
 - Component Items (Filters)
- Reporting:
 - Tasking Service Order
 - Filter Requirements

Assumptions

- You are licensed to use the Ascente – Service Dispatch, Maintenance and Tasking modules.
- The jobsite and maintenance contract records have already been created and you know how to maintain them and add new records when necessary.
- You have or will create a list of the common equipment that you will assign the tasking to.
- You have or will create a checklist of tasks that are required for the components or equipment you maintain on your service contracts.
- Tasking will only print on service orders that were created using the Create Maintenance Service Orders program.

Terminology

Component

- This is an actual major piece of equipment associated with a jobsite that may have an installation date, warranty date, serial # or other information associated with it. This is also referred to as a 'Unit'. All tasking references a component, therefore you must setup a component in order to assign tasking and items.
 - Examples:
 - 2 Ton Trane Cooler
 - Condenser
 - HVAC Unit
 - Water Heater

Equipment

- Equipment records are generic types of equipment that tasking records are assigned to. It may help you to think of these as a *tasking template*. Where as a component record references a specific install date, warranty date and serial #, equipment only references tasking records.
- When a component record is added, you can associate the component record to an equipment record. This will allow you to use all of the tasking records linked to the equipment record. If this were not done, you would have to manually attach every tasking record to the component.
 - Examples:
 - Air Compressor
 - Air Handler
 - Automation System
 - Boiler
 - Cooling Tower

Tasks

- Think of tasks as a To-Do List for your technicians when they service a component covered by a maintenance contract.
 - Examples
 - Change Filter
 - Replace Belts
 - Check Oil
 - Note Pressure Reading
- *Do not confuse maintenance contract tasking with flatrate tasks. Contract tasking references maintenance contracts and flatrate tasks are groupings of items used to print a flatrate price book and to automate data entry.*

Item

- These are inventory items that are defined in the Traverse Inventory module. You must setup your items in the [Traverse / Inventory / Setup and Maintenance / Items](#) before they can be applied to a component. You will predetermine the items and their quantity required to perform the scheduled maintenance on the covered component.
 - Examples:
 - R-22 Freon (5 lbs)
 - R-12 Freon (4 lbs)
 - 26x20x1 Pleated Filter (2)
 - 20 Inch Belt (1)

Considerations

- Compusource provides a default set of tasking and equipment records with each new company. After you have determined how you need your equipment and tasking records to be setup, you may want to delete the existing default tasking and equipment records so you can start new. Compusource can assist you with that.
- The time required to complete the equipment and tasking setup is determined by how detailed your tasking is and by how many different types of equipment you service.
- This will require an investment in time and planning to do this correctly.

Recommendations

- It has been our experience that every company should have one person that oversees how this is setup and implemented. This will assure better results and a more consistent look.
- You might want to setup just a few tasking and equipment records and test with them before doing the rest of the setup.
 - See how the tasking looks on the Tasking Service Order form
 - Does it make sense to the technicians in the field?

Setup Cycle

- Labor Grades
- Tasks
- Equipment
- Jobsite
 - Components
 - Tasking
 - Item List

Setup

Labor Grades

- Labor Grades are one-character codes, used to group technicians by area and skill level. These are used by the Maintenance Contract system to determine which technicians will perform certain Equipment Tasks or install certain Filters or other parts. Maintenance Contracts are set up in the Jobsite file and each contract can be assigned one or more labor grade that is required to perform the service.

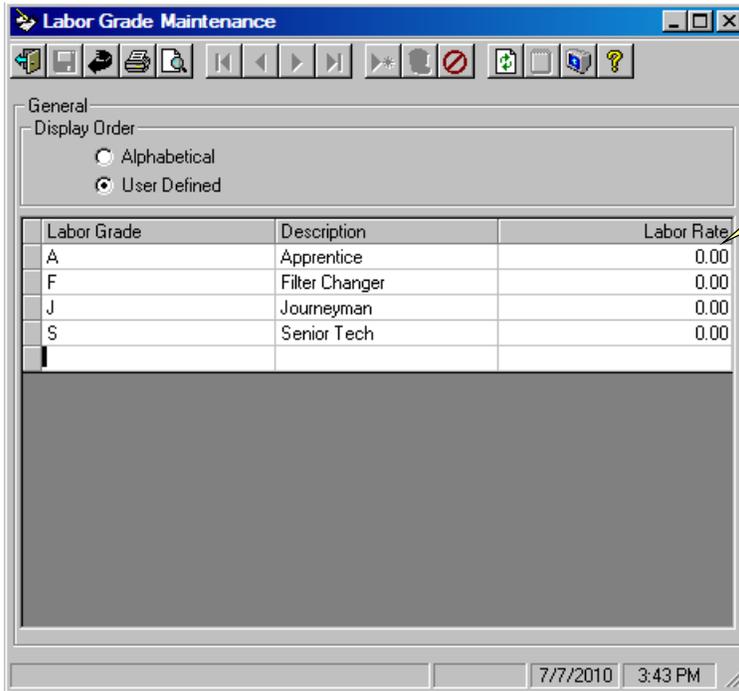


Figure 1: Labor Grade Maintenance

Tasks

- Tasks provide a convenient way to list and describe maintenance tasks. The Equipment program uses these tasks to create default task lists for specific equipment types. A list of tasks can be added to a component automatically or specific tasks can be added on a selective basis for tasking unique to a certain job site.
- When Ascente was installed, you were given a default set of Equipment and Task records. You will need to decide if you want to use these, edit them to be the way you need them or have them deleted so that you can start from scratch. Compusource can assist you with deleting these records.

Important Considerations

- Tasks when printed on the Tasking Service order and other reports will always sort based on the task number. Be sure to assign the task numbers in the order you want them to sort. See the Task Listing on the next page.
- It has proven useful to group tasks using the digit to the left of the decimal point and uses the decimals to the right if the decimal to sort the detail for the task.

In this format example, each line is a task record:

```

1.00  Heading Task 1
      1.01  Task Detail Line 1
      1.02  Task Detail Line 2
2.00  Heading Task 2
      2.01  Task Detail Line 1
      2.02  Task Detail Line 2
    
```

- Ascente / Service Dispatch / Maintenance / Tasks

The task # is used for sorting on the Tasking Service Order and other reports.

Note that dots were entered at the beginning of the description so that the technician could check off this task once it is done.
The line after is for the technician to write in information.

Sub Heading: Checking the Sub-Heading box indicates that this task is a detailed item that is part of a group of tasks. This field is currently NOT being used by Ascente, but can be used by custom reports.

This is the budget hours for this task. This does not update to the service order scheduling board.

Items without the box checked would be "Major Categories" and reports could be written to present these selections to the customer.

Figure 2: Task Maintenance

<u>Task</u>	<u>Description</u>	<u>SubHeading</u>	<u>Hours</u>
1.00	GENERAL INFORMATION	False	10.00
1.01	FILTERS	False	0.00
1.02	....Filter Sizes and quantity.....	False	0.00
1.06		False	0.00
1.07	BELTS	False	0.00
1.08	....Belt Sizes and quantity.....	False	0.00
2.00	MCQUAY CHILLERS/OPERATION	True	0.00
2.01	....Visual inspection of unit for damage	True	0.00
2.02	....Inspect thermal insulation for integrity	True	0.00
2.03	MCQUAY CHILLERS/ELECTRICAL	True	0.00
2.04	....Check terminals & tighten as necessary	True	0.00
2.05	....Clean control panel interior	True	0.00
2.06	....Check wiring for overheating conditions	True	0.00
2.07	....Check compressor heater operation	True	0.00
2.08	....Meg motor	True	0.00
2.09	MCQUAY CHILLERS/REFRIGERATION	True	0.00
2.10	....Check and leak test system	True	0.00
2.11	....Check sight glass and note	True	0.00
2.12	....Check filter drier pressure drop	True	0.00
2.13	....Perform compressor vibration test	True	0.00
2.14	MCQUAY CHILLERS/CONDENSER	True	0.00
2.15	....Clean condenser coils	True	0.00
2.16	....Check fan blades for tightness on shaft	True	0.00
2.17	....Check fan blades for cracks	True	0.00
2.18	....Check coils for damage	True	0.00
2.19	....Start unit check operation	True	0.00
2.20		True	0.00

Figure 3: Sample Tasking List

Equipment

- The Equipment program is used to categorize components into like kinds of equipment. This file also contains tasking information for this type of equipment. These associated task records can be imported to a component when setting up tasking for a jobsite.
- [Ascente / Service Dispatch / Maintenance / Equipment](#)

Equipment Maintenance

Equipment: Air Compressor

General
Description: Air Compressor

Task ID	Task Description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
91.00	AIR COMPRESSORS/GENERAL	J			J			J			J		
91.01	....Check & tighten connections	J			J			J			J		
91.02	....Check all contactors	J			J			J			J		
91.03	....Check & record voltage	J			J			J			J		
91.04	....Check belts	J			J			J			J		
91.05	....Check oil level & charge as needed	J			J			J			J		
91.06	....Check for any leaks	J			J			J			J		
91.07	....Check filters & replace as needed	J			J			J			J		
91.08	....Blow down manual/auto drain	J			J			J			J		
91.09	....Check operation of controls	J			J			J			J		

Created: 3/5/2003 12:28:00 AM Changed: ernie 1/27/2004 12:07:00 PM 7/7/2010 3:01 PM

Figure 4: Equipment Maintenance

Jobsite

- You will need to select the jobsite and component to add the tasking to. You will need to add the jobsite and/or component if they do not already exist.

Component

- You will need to select the jobsite and component to add the tasking to. You will need to add the jobsite and/or component if they do not already exist.
- [Ascente / Service Dispatch / Maintenance / Jobsite \[Component\] tab / \[General\] tab](#)

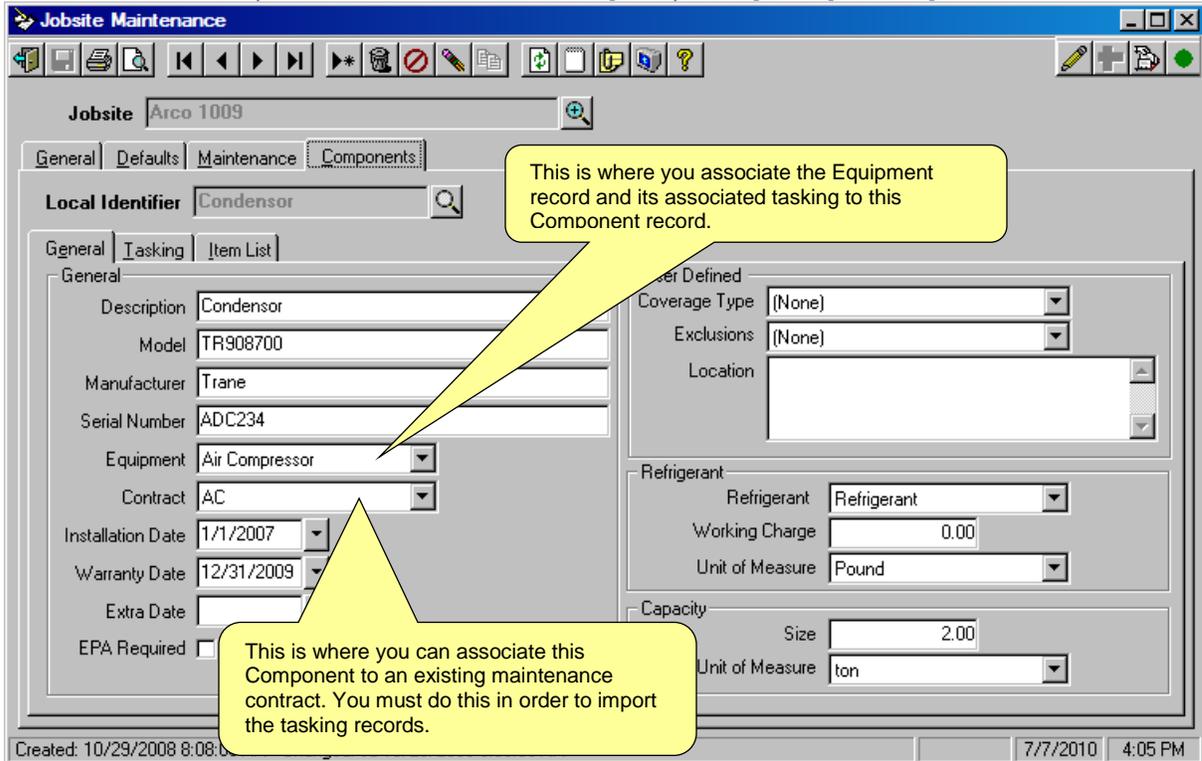
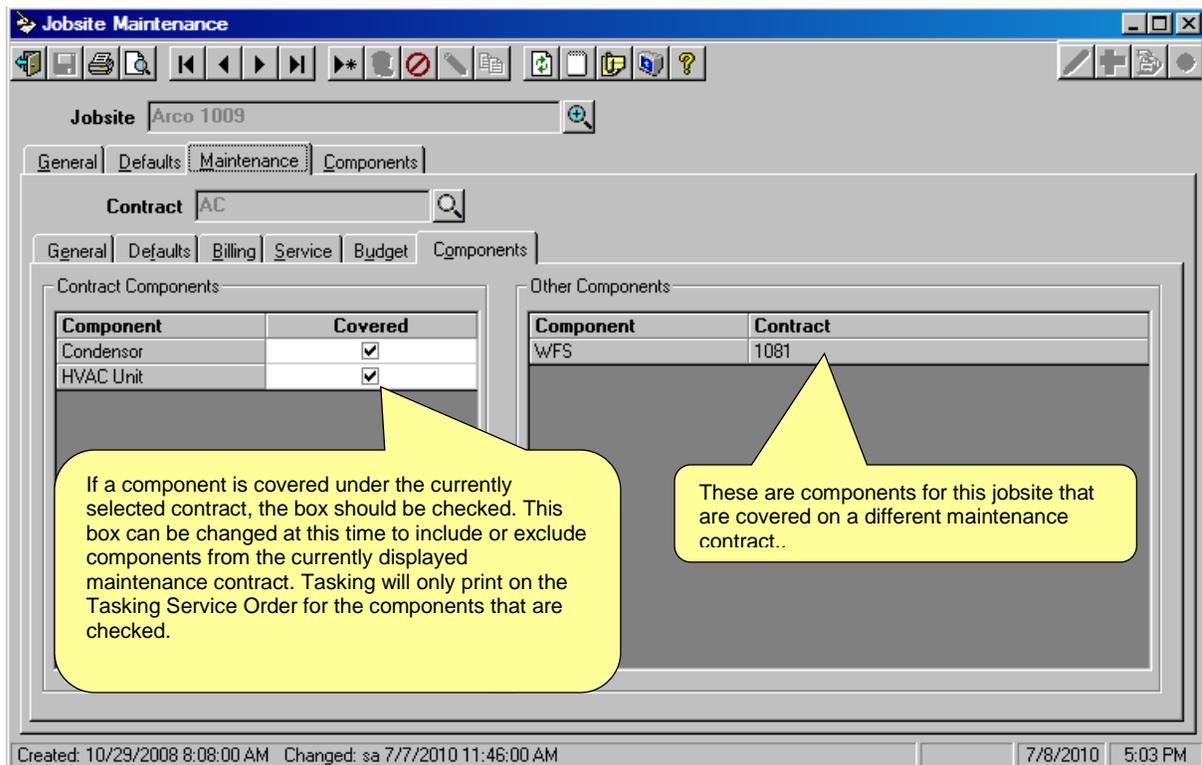


Figure 5: Jobsite - Component [General] tab

Maintenance - Components

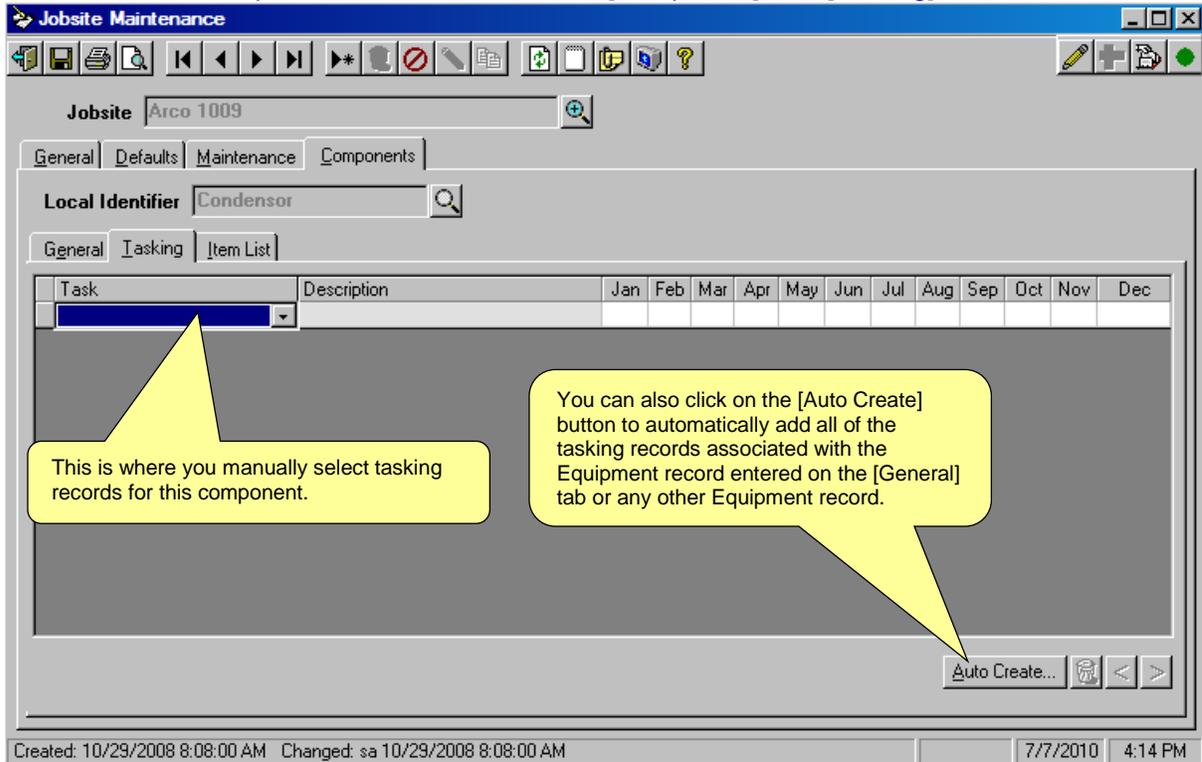
- Once the components are added, you will need to verify the components that are covered on each maintenance contract. Only the covered components will have their tasking and items included on the Tasking Service Order.
- [Ascente / Service Dispatch / Maintenance / Jobsite \[Maintenance\] tab / \[Maintenance\] tab / \[Components\] tab](#)
- Covered: A checkbox is displayed for each component. If a component is covered under the currently selected contract the box will be checked. This box can be changed at this time to include or exclude components from the currently displayed maintenance contract.
- Other Components: Only components that are currently covered by a different contract for this jobsite are displayed in this grid.
- Component: Components that are covered under a different contract will be displayed here. They can be moved to the currently selected maintenance contract by doing one of the following:
 - Bring up the contract which includes this component. Uncheck the box to change the status to not covered. Open the desired contract and check that component as covered.
 - Go to the Components tab, General sub-tab, and select the component from Lookup. Change the maintenance contract for this component to the desired contract.
- Contract: Displays the maintenance contract covering the other components



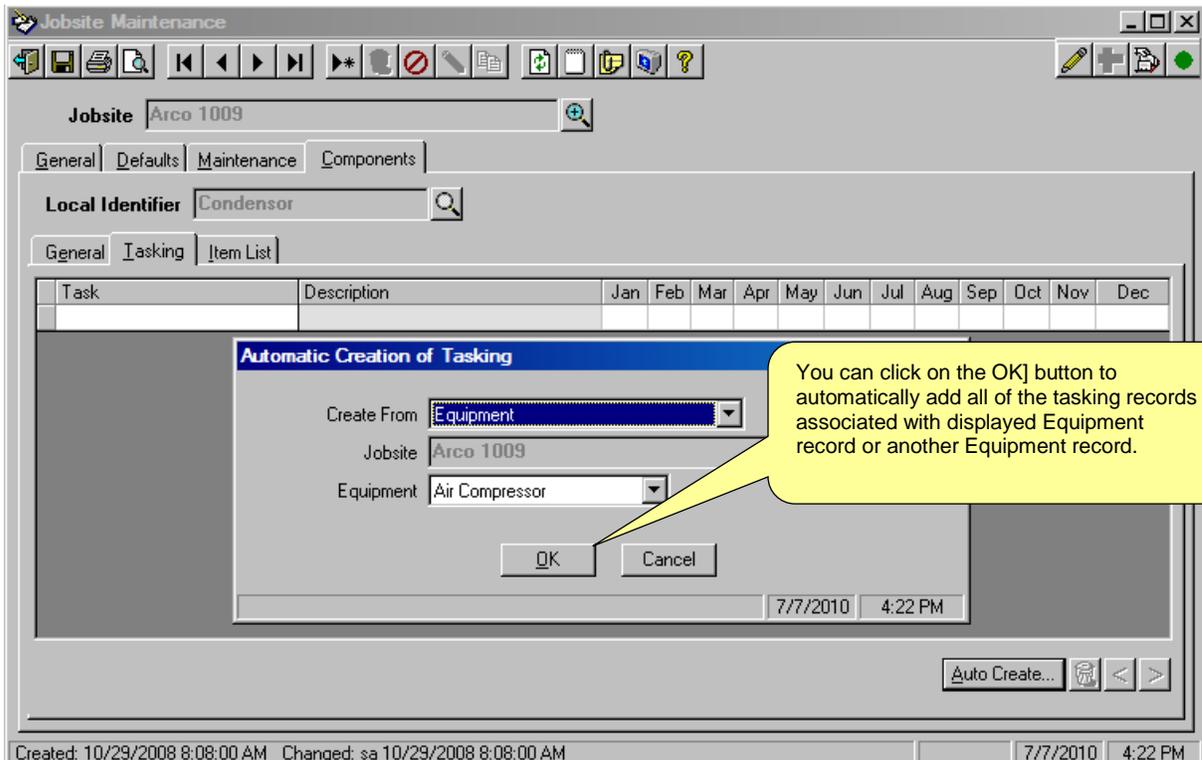
- **Figure 6: Jobsite - Maintenance - Components is used to determine the components covered on the maintenance contract.**

Tasking

- You will need to click on the [Tasking] tab enter the tasking records for a Jobsite Component
- [Ascente / Service Dispatch / Maintenance / Jobsite \[Component\] tab / \[Tasking\] tab](#)



• **Figure 7: Jobsite - Component [Tasking] tab**



• **Figure 8: Jobsite - Component [Tasking] tab - [Auto Create] tasking button**

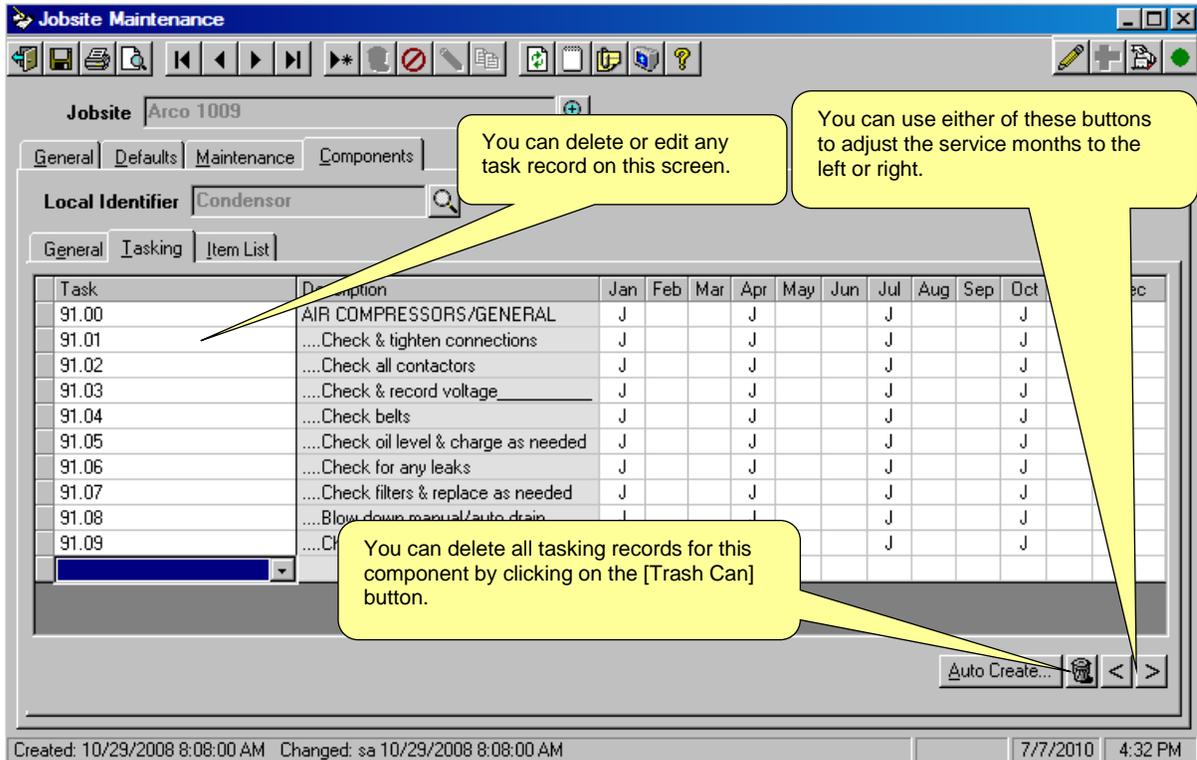


Figure 9: Jobsite - Component [Tasking] tab with tasking records

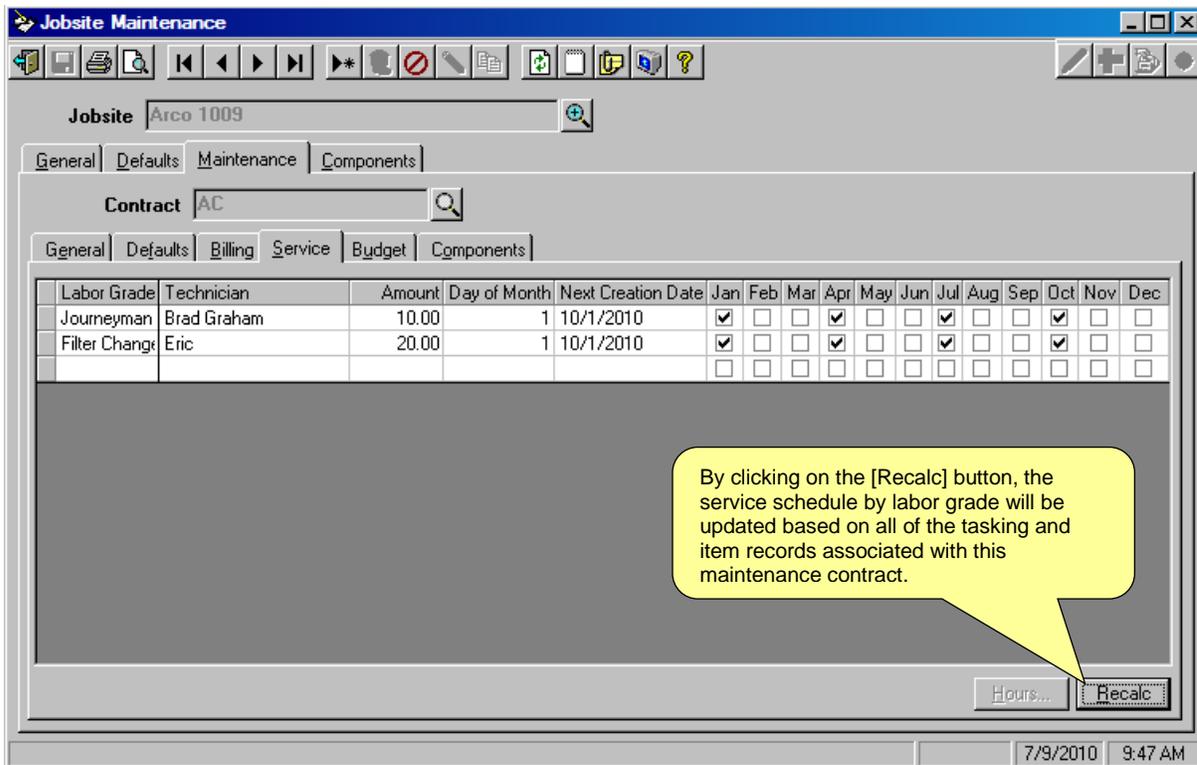


Figure 10: Jobsite - Maintenance [Service] tab prior to clicking on the [Recalc] button

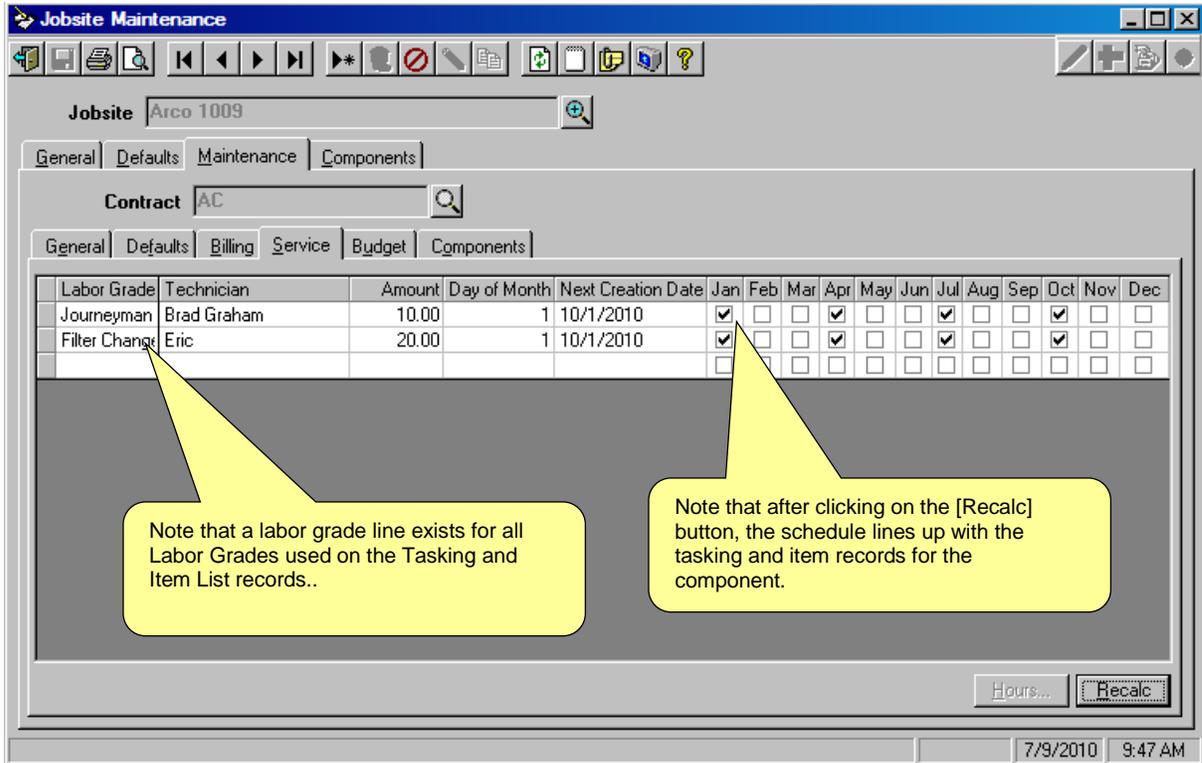


Figure 11: Jobsite - Maintenance [Service] tab after clicking on the [Recalc] button

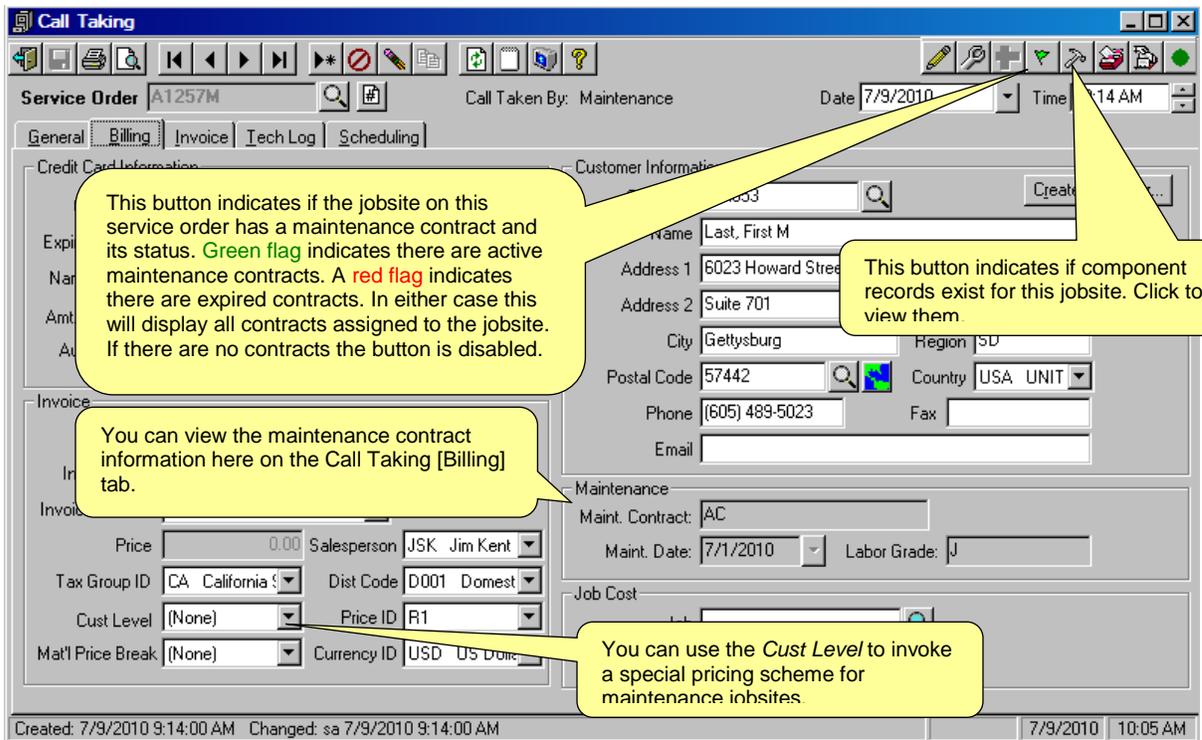
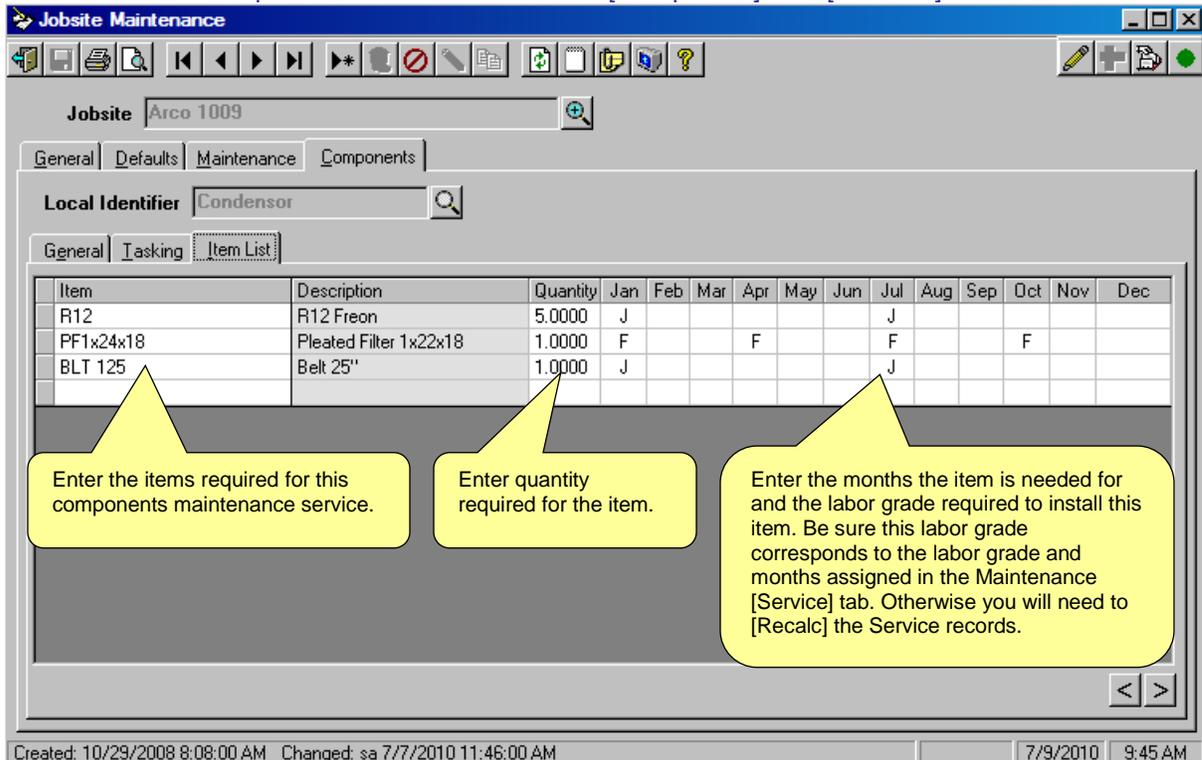


Figure 12: Call Taking [Billing] tab. Maintenance Contract Information.

- Item List
The items entered on the Jobsite Components [Item List] tab are used on the Tasking Service Order and the Filter Requirements Report
- You will need to click on the [Item List] tab to enter the item records required to perform the scheduled maintenance for this Jobsite Component.
- You will enter the item(s), quantities and the months and labor grade required.
- [Ascente / Service Dispatch / Maintenance / Jobsite \[Component\] tab / \[Item List\] tab](#)



Created: 10/29/2008 8:08:00 AM Changed: sa 7/7/2010 11:46:00 AM

Important Considerations

- Only items setup in the Traverse –Inventory module can be entered.
- You need to make sure that the months entered align with the months on the service schedule. For example; if the service was scheduled for February, the Tasking Service Order would not indicate that any of the above items are required, because there are no entries for February above. You can click on the [Recalc] button on the Maintenance [Service] tab to realign the labor grades and months.
- You need to make sure that if a tech is assigned to this maintenance contract on the Maintenance [Service] tab, is assigned labor grade in his Technician record is the same as the labor grade entered for the items above.

Reporting

Tasking Service Order

- The Tasking Service Order is intended to be printer and given to the technicians that will be doing the service on the maintenance service orders. The tasking service order will include the components, tasking and items as setup for the maintenance contract.
- Only service orders created by the Create Maintenance Service Orders program will include the components, tasking and items information.
- You can use any of the selection criteria when printing service orders. These are the often used criteria when printing the 'Tasking Service Order's'.
- [Ascente / Service Dispatch / Reports / Service Order Print](#)

Runtime Options

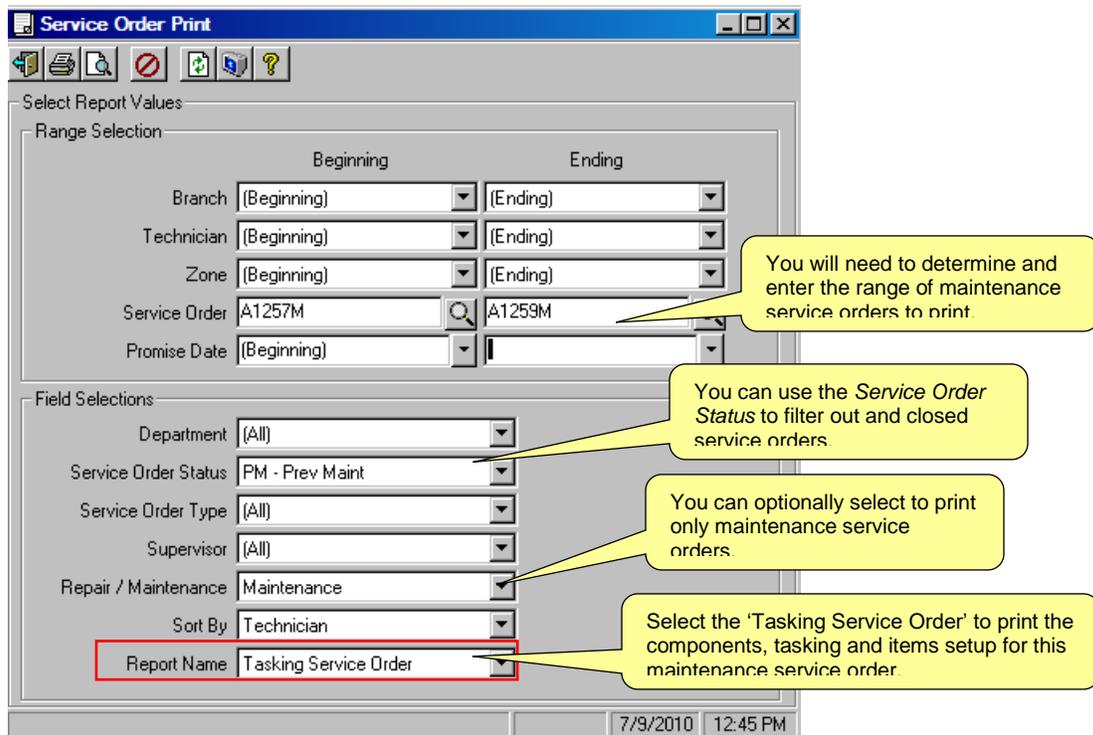


Figure 14: Service Order Print

- After printing the Tasking Service Order, you can go back edit the items or tasking and then reprint the Tasking Service Order again and see those changes.

7/09/10 9:40 am				Continental Products Unlimited Maintenance Service Order		Page 1 of 1 Service Order A1257M		
Branch	AT Atlanta Branch	Tech	Brad Graham Brad Graham	Labor Grade J Purchase Order Maintenance Contract AC				
Zone	AT002	Department	Air Conditioning					
Jobsite Name	Arco 1009 Arco 2310 Steve Reynolds	Cust Id	Atm053 Last, First M 8023 Howard Street Suite 701 Gettysburg SD 57442 USA	Status	PM - Prev Maint	Maintenance Date	7/1/2010 12:00:00AM	
Address	Norcross GA 30093 USA	Phone	Primary (770) 565-888 14 Hank Mobile (770) 568-887 Hank	Promise Date	7/1/2010	Prom Time	Anytime	
				Priority	Regular	Est Hours	1.00	
				Scheduled:	07/01/2010 Anytime			
Condensor								
Local ID	Condensor	Model	TR908700	Serial Number	ADC234			
Manufacturer	Trane	Equipment	Air Compressor Air Compressor	Instal Date	1/1/2007			
				Warranty Date	12/31/2009			
Task								
<input type="checkbox"/>	91.00	AIR COMPRESSORS/GENERAL						
<input type="checkbox"/>	91.01	...Check & tighten connections						
<input type="checkbox"/>	91.02	...Check all contactors						
<input type="checkbox"/>	91.03	...Check & record voltage						
<input type="checkbox"/>	91.04	...Check belts						
<input type="checkbox"/>	91.05	...Check oil level & charge as needed						
<input type="checkbox"/>	91.06	...Check for any leaks						
<input type="checkbox"/>	91.07	...Check filters & replace as needed						
<input type="checkbox"/>	91.08	...Blow down manual/auto drain						
<input type="checkbox"/>	91.09	...Check operation of controls						
Item								
<input type="checkbox"/>	R12	R12 Freon					Quantity	5.00
<input type="checkbox"/>	BLT 125	Belt 25"						1.00
HVAC Unit								
Local ID	HVAC Unit	Model	123412341234A	Serial Number	321321321321			
Manufacturer	Trane	Equipment		Instal Date				
				Warranty Date				

Note that only tasks and items for the labor grade 'J' are listed.

Figure 15: Tasking Service Order - This is for the (J)ourneyman coded tasks and items

7/09/10 9:40 am				Continental Products Unlimited Maintenance Service Order		Page 1 of 1 Service Order A1259M		
Branch	AT Atlanta Branch	Tech	Eric Eric VonGrenn	Labor Grade F Purchase Order Maintenance Contract AC				
Zone	AT002	Department	Air Conditioning					
Jobsite Name	Arco 1009 Arco 2310 Steve Reynolds	Cust Id	Atm053 Last, First M 8023 Howard Street Suite 701 Gettysburg SD 57442 USA	Status	PM - Prev Maint	Maintenance Date	7/1/2010 12:00:00AM	
Address	Norcross GA 30093 USA	Phone	Primary (770) 565-888 14 Hank Mobile (770) 568-887 Hank	Promise Date	7/1/2010	Prom Time	Anytime	
				Priority	Regular	Est Hours	1.00	
				Scheduled:	07/01/2010 Anytime			
Condensor								
Local ID	Condensor	Model	TR908700	Serial Number	ADC234			
Manufacturer	Trane	Equipment	Air Compressor Air Compressor	Instal Date	1/1/2007			
				Warranty Date	12/31/2009			
Item								
<input type="checkbox"/>	PF1x24x18	Pleated Filter 1x22x18					Quantity	1.00
HVAC Unit								
Local ID	HVAC Unit	Model	123412341234A	Serial Number	321321321321			
Manufacturer	Trane	Equipment		Instal Date				
				Warranty Date				

Note that only tasks and items for the labor grade 'F' are listed.

Figure 16: Tasking Service Order - This is for the same maintenance contract as above, but this is for the (F)ilter Changer coded tasks and items

Filter Requirements Report

The Filter Requirements report shows all items required to complete maintenance service orders for a given month. This report is not just for filters. It is for any items that have been setup as Component – Item List records. This is a useful tool to plan purchases of filters with the various suppliers. It may be possible to arrange a volume discount if a month’s worth of filters is purchased at the start of a month. This report selects only items that are within the maintenance date range. Repair service orders do not contain filter information.

Note: Only Maintenance service orders appear on this report. Repair service orders are ignored.

The report can be run based on either:

- Jobsite
 - Use this if you need the report before the maintenance service orders have been created.
- Service Order
 - This selects existing service orders created by the Create Maintenance Service Orders program.

There are three versions of the Filter Requirements Report that can be selected:

- Filters by Item
 - This is beneficial for ordering items.
- Filters by Jobsite
 - This is beneficial for delivering items to jobsites.
- Filters by Tech
 - This is beneficial for distributing items to technicians.

Runtime Criteria

- Starting and ending Branch
- Starting and ending Maintenance Date
- Starting and ending Item Number

The screenshot shows the 'Filter Requirements Report' window with the following fields and callouts:

- Range Selection:**
 - Branch: (Beginning) [dropdown] | (Ending) [dropdown]
 - Maintenance Date: 7/1/2010 [dropdown] | 7/31/2010 [dropdown]
 - Item: (Beginning) [dropdown] | (Ending) [dropdown]
- Field Selection:**
 - Report From: Service Order [dropdown]
 - Report Name: Filters By Item [dropdown menu showing Filters By Item, Filters By Jobsite, Filters By Tech]

Callout boxes provide additional information:

- Top right: This is determined by either the service order or Jobsite-Maintenance- Service record
- Middle right: Enter an item ranger or return for all items.
- Bottom right: Your choices are Service Order or Jobsite.
- Bottom right: These three options select the same records, they are just sorted differently.

Figure 17: Filter Requirements Report

Item Selection

Item records are selected from Item List requirements for all components that will be serviced by this maintenance service order. The labor grade for the month of service for each item that prints on this report must match the labor grade for the maintenance service order.

Filters by Item

7/09/10 11:53 am		Continental Products Unlimited						Page 1 of 1	
Filter Requirements Report - Filters by Item									
Item	Item Description	Technician	Service Order	Jobsite	Contract	Component	Lab Gr	Quantity	
Branch AT		Atlanta Branch							
BLT 125	Belt 25"	Brad Graham	A1257M	Arco	AC	Condensor	J	1.00	
BLT 125	Belt 25"						Total	1.00	
PF1x24x18	Pleated Filter 1x22x18	Eric	A1259M	Arco	AC	Condensor	F	1.00	
PF1x24x18	Pleated Filter 1x22x18						Total	1.00	
R 12	R 12 Freon	Brad Graham	A1257M	Arco	AC	Condensor	J	5.00	
R 12	R 12 Freon						Total	5.00	
Branch LA		Los Angeles County							
BLT 125	Belt 25"		LA200168M	TEXACO	AC	AC3	J	1.00	
BLT 125	Belt 25"						Total	1.00	
BLT 126	Belt 26"		LA200168M	TEXACO	AC	AC6	J	1.00	
BLT 126	Belt 26"						Total	1.00	
PF1x24x18	Pleated Filter 1x22x18		LA200168M	TEXACO	AC	AC3	J	1.00	
PF1x24x18	Pleated Filter 1x22x18						Total	1.00	
PF1x24x26	Pleated Filter 1x22x26		LA200168M	TEXACO	AC	AC3	J	2.00	
PF1x24x26	Pleated Filter 1x22x26						Total	2.00	
PF1x24x28	Pleated Filter 1x22x28		LA200168M	TEXACO	AC	AC6	J	2.00	
PF1x24x28	Pleated Filter 1x22x28						Total	2.00	
R 12	R 12 Freon		LA200168M	TEXACO	AC	AC3	J	5.00	
R 12	R 12 Freon		LA200168M	TEXACO	AC	AC6	J	6.00	
R 12	R 12 Freon						Total	11.00	

Figure 18: Filter Requirements Report by Item

Filters by Jobsite

7/09/10 12:16 pm		Continental Products Unlimited Filter Requirements Report - Filters by Jobsite						Page 1 of 1	
Item	Item Description	Technician	Service Order	Jobsite	Contract	Component	Lab Gr	Quantity	
Branch AT		Atlanta Branch							
Jobsite: Arco									
BLT 125	Belt 25"	Brad Graham	A1257M	Arco	AC	Condensor	J	1.00	
BLT 125	Belt 25"						Total	1.00	
PF1x24x18	Pleated Filter 1x22x18	Eric	A1259M	Arco	AC	Condensor	F	1.00	
PF1x24x18	Pleated Filter 1x22x18						Total	1.00	
R 12	R 12 Freon	Brad Graham	A1257M	Arco	AC	Condensor	J	5.00	
R 12	R 12 Freon						Total	5.00	
Branch LA		Los Angeles County							
Jobsite: TEXACO									
BLT 125	Belt 25"		LA200168M	TEXACO	AC	AC3	J	1.00	
BLT 125	Belt 25"						Total	1.00	
BLT 126	Belt 26"		LA200168M	TEXACO	AC	AC6	J	1.00	
BLT 126	Belt 26"						Total	1.00	
PF1x24x18	Pleated Filter 1x22x18		LA200168M	TEXACO	AC	AC3	J	1.00	
PF1x24x18	Pleated Filter 1x22x18						Total	1.00	
PF1x24x26	Pleated Filter 1x22x26		LA200168M	TEXACO	AC	AC3	J	2.00	
PF1x24x26	Pleated Filter 1x22x26						Total	2.00	
PF1x24x28	Pleated Filter 1x22x28		LA200168M	TEXACO	AC	AC6	J	2.00	
PF1x24x28	Pleated Filter 1x22x28						Total	2.00	

Figure 19: Filter Requirements Report - Filters by Jobsite

Filters by Tech

7/09/10 12:19 pm		Continental Products Unlimited						Page 1 of 1	
Filter Requirements Report - Filters by Tech									
Item	Item Description	Technician	Service Order	Jobsite	Contract	Component	Lab Gr	Quantity	
Branch AT		Atlanta Branch							
Tech: Brad Graham									
BLT 125	Belt 25"	Brad Graham	A1257M	Arco	AC	Condensor	J	1.00	
BLT 125	Belt 25"							Total	1.00
R 12	R 12 Freon	Brad Graham	A1257M	Arco	AC	Condensor	J	5.00	
R 12	R 12 Freon							Total	5.00
Tech: Eric									
PF1x24x18	Pleated Filter 1x22x18	Eric	A1259M	Arco	AC	Condensor	F	1.00	
PF1x24x18	Pleated Filter 1x22x18							Total	1.00
Branch LA		Los Angeles County							
Tech:									
BLT 125	Belt 25"		LA200168M	TEXACO	AC	AC3	J	1.00	
BLT 125	Belt 25"							Total	1.00
BLT 126	Belt 26"		LA200168M	TEXACO	AC	AC6	J	1.00	
BLT 126	Belt 26"							Total	1.00
PF1x24x18	Pleated Filter 1x22x18		LA200168M	TEXACO	AC	AC3	J	1.00	
PF1x24x18	Pleated Filter 1x22x18							Total	1.00

Figure 20: Filter Requirements Report - Filters by Tech

Flowcharts

Maintenance Contracts

