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Maintenance

In OneView users have the ability to set up maintenance jobs on their assets. They can set up oil changes or any general maintenance. These job tickets can be for a single occurrence or recurring based on triggers you set.

How to set up Maintenance

When users are ready to set up maintenance simply need to follow the procedure below.

1. The user can click on the Maintenance Tab in OneView

   ![OneView Maintenance Tab]

2. Click on **Create Maintenance**

   ![Create Maintenance]

   OR

Right click on the user or asset in the menu tree off to the left side of the screen. A new box will pop up and the user should select Maintenance and then select the maintenance template they would like to use.
Fill out the maintenance template

Section A:

**Target:** Click on the drop down and select Target, which is the asset this maintenance is on.

**Job Name:** Place any number(s) or letter(s) the user would like to use in this box. There is a default value entered automatically to give uniqueness if you don’t want to provide your own Job Name.

**Job Description:** Type the Maintenance description the user would like or leave it as the template name.

**Assignee:** Click on the drop down and choose Select Assignee. All of the OneView users will display. Select the user the maintenance will be assigned to or if you don’t want to assign it to anyone leave it blank.

**Notes:** Add notes to this maintenance ticket. Notes will continue to appear on any recurring tickets.

Section B:

**Work To Do:** This is a free form field that users can indicate what work needs to be completed during this maintenance.

**Fill Out: Maintenance Form:** Use this form upon completion of maintenance to track work completed and costs. Not to be filled out on ticket creation, only after job is completed.

Section C: **Maintenance triggers – use any one or combination of triggers for this maintenance ticket.**

**Due Date:** Click in the date box and select date the maintenance is due. Then choose a recurring timeframe. It can be any number of Minutes, Hours, Days, Weeks, Months, Quarters or Years. Simply uncheck this box if it is not recurring.

**Due Odometer:** Place the next odometer reading that the asset will need the maintenance. Check the recurring box and then choose a recurring timeframe. It can be any number of miles/kilometers.
**Due Runtime:** Place the next runtime reading that the asset will need the maintenance. Check the Recurring box if this maintenance is recurring. Next choose a recurring timeframe. It can be any number of hours.

**Due PTO Runtime:** Place the next PTO runtime reading that the asset will need the maintenance. Check the Recurring box if this maintenance is recurring. Next choose a recurring timeframe. It can be any number of hours.

---

**Section D:**

1. **Notify (due date):** Place a checkmark here if a user would like to be notified before the maintenance is due. Then in the drop down select the users or group of users to be notified and how long before the job is due they would like to be notified.

2. **Notify (odometer):** Place a checkmark here if a user would like to be notified before the maintenance is due based on the odometer miles. Then in the drop down select the users or group of users to be notified and how many miles before the job is due they would like to be notified.

3. **Notify (runtime):** Place a checkmark here if a user would like to be notified before the maintenance is due based on engine runtime hours. Then in the drop down select the users or group of users to be notified and how many hours before the job is due they would like to be notified.

4. **Notify (PTO runtime):** Place a checkmark here if a user would like to be notified before the maintenance is due based on POT runtime hours. Then in the drop down select the users or group of users to be notified and how many hours before the job is due they would like to be notified.

5. **Notify (on any due trigger):** Place a checkmark here if a user would like to be notified when any of the checked triggers are hit. Then in the drop down select the users or group of users to be notified and how they would like to be notified.
Create Job

1. Click the **Create Job** button.

![Create Job button highlighted](image)

2. Look in the bottom right corner of the maintenance screen to make sure it displays **Job has been successfully created**. Then the user should click on **Close**.

![Job has been successfully created](image)

Create Job and Set to Done

Use Create Job And Set To Done if you’ve entered work that has already been completed as the start of a recurring maintenance for future automatic job ticket creation.

![Create Job And Set To Done button highlighted](image)

**NOTE:** If you are going to attach an image or pdf to the maintenance, create and set to done first, then find the completed job in the maintenance history and add the image(s) or pdf(s) after. Any attached images or pdfs will not save using the Create Job And Set To Done feature.

How to Complete a Maintenance

After maintenance is complete on the asset, users will need to go into OneView to mark the maintenance as done. This will start the recurring process on the asset or it will remove it from the maintenance tab once it is completed and it is not recurring. **DO NOT USE THE EDIT PENCIL TO RECORD THE COMPLETION OF A MAINTENANCE TICKET.**
1. **Open the Job/Ticket**
Click on the Job ID or Name, or right click anywhere on the job and then click on View on the dropdown menu.

<table>
<thead>
<tr>
<th>Job ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1221037</td>
<td>D-Service 365 Days</td>
</tr>
<tr>
<td>122647</td>
<td>L-Service 365 Days</td>
</tr>
<tr>
<td>2312269</td>
<td>B-Service</td>
</tr>
<tr>
<td>7822045</td>
<td>General Maintenance</td>
</tr>
</tbody>
</table>

The maintenance will pop-up and display in the center of the screen.

2. **Enter Completion Time**
The triggers for any recurring maintenance tickets are based on the time of completion for calculating when the next subsequent maintenance will be due. On the right side of the maintenance popup window, the top section will be when the maintenance was started and completed. If you are starting the maintenance and want to track how long it takes, click Now for the start time. Then save. When the work is complete, come
back to the form and add the completion date and time.

If the maintenance is already complete and you are filling out the form after, make the Start time and Completion time the actual time the job was completed. Click in the calendar field and type the date and time or use the calendar popup to click on the date and use the time picker to select the time. Then Save your time.

After you save the step, it will show your progress – either In Progress (blue) if you only added start time, or Done (gray) if you added both start and completion times.

Use the Edit button if you need to go back and make changes to the times you entered.
3. **Fill Out Maintenance Form**

The Maintenance form allows you to track costs, parts used, and even upload files or images to keep with the completed maintenance ticket.

A. **Work Done** – add the description of the work that was done for this maintenance. Optional.

B. **Work Done By** – Add the name of the mechanic who did the work. This does not have to be a user of OneView, so you can add the name of the repair shop or an employee. This field is optional.

C. **Work Done Time** – the date and time you add here will pull in the odometer and runtime of the asset at that particular time and date. It is important to make this match the actual time and date that the work was done, especially if you are filling out a recurring ticket.

**Part Form**

Use the Part Form to add part names and descriptions, how many parts used, and the cost of each. The form will calculate your totals and subtotals. Use the “Add Part Form” button. Use the trash can to delete a part section if needed.

D. **P/N** – enter the part number

E. **Description** – enter the description of the part

F. **Qty** – enter the quantity or the number of these parts that were used, or volume of fluids used

G. **Cost** – how much was each part or unit of fluid?

H. **Delete/Trash** – click the trash can to delete this part and its specifics

I. **Add Part Form** – to itemize more than one type of part, keep adding as many Part Form sections as needed

J. **Save or Save & Mark All as Done** – you can save your work and come back later, or Save your work and show that the step is done. There is also a Mark as Done button at the top of the “fill out maintenance form section.”
K. **Total** - Below the part form, you will see the total calculated amount. This field adds up all of the costs and quantities of the parts entered in the Part Form section.

L. **Odometer** – this will show what the odometer of the asset was at the date and time of the work done from the first section of the part form (see C above)

M. **Runtime** – this will show the engine runtime of the asset at the time entered in the work done section (see C above)

**Scan**

Use the Scan section to add images or pdf files from your computer. Image Upload will allow you to choose a jpg format image from your computer to add to this form. File Upload will allow you to choose a pdf from your computer to add to this form. Use the Add Scan button to add more images or files. The file size of each image or file is limited to 2MB.

N. **Image Upload** – add a jpg file to the form

O. **File Upload** – add a pdf file to the form

P. **Add Scan** – if you have more than one image or more than one pdf, use the add scan button to add more images and/or pdf’s

Q. **Mark as Done** – this will mark your maintenance form as done.

Save – this will save your work

Save & Mark All as Done – will both save your work and mark this form as done or completed.
**Unsaved Changes**

If you have unsaved changes and try to close the maintenance window, a warning message will appear asking if you want to proceed without saving and that any unsaved changes will be lost. You can proceed if you don’t want to save any of the changes, or Cancel and then save your changes. Once all your work is saved, you can close the window with no warning message.

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**Job Summary Tab**

The left side of the job window includes multiple tabs. The first tab is the Job Summary. This tab includes details about the job with links to the asset (Target), assignee, the creator of the ticket, and information about Job status, when its due, and any notes that exist. In the summary, you can now use the edit pencil to change the assignee of the job instead of having to edit the original ticket just to change the assignee field.
Map Tab
Use the map tab on the left side of the job window to see the current location of the target of this job. This map is interactive, like all maps in OneView. Use the map dropdown to change the type of map, add traffic or labels and all other normal map features like zoom and street view.

Schedule Tab
The details of how this job was scheduled is included on this tab. If this job is recurring, you will see the interval of how often this job will reschedule and includes each trigger used to schedule the recurring maintenance.
History Tab
This tab shows all of the activity associated with this job. You will see when it was created and by whom, if the job reached any due triggers, if the job was altered or changed, like when a new assignee was added, and if alerts or notifications were sent out.

Edit Button
You’ll find the edit button at the bottom left of the job window. If you need to edit any of the original information for this job, click the edit button. Reminder: if you are just changing the assignee, the edit pencil in the Job Summary is all you would need.
Clone Button

Use the clone button to make up to 10 copies of this job. You can adjust each individual job name, job description, target, assignee, and due date before submitting the cloned tickets.

Delete Button

The delete button is now highlighted in red. Use it to delete any job ticket.
How to Edit a Maintenance

Once a maintenance has been created users have a few options they can do with them. Users have the ability to Edit, Clone or Delete it.

Edit the Maintenance

1. Click on the Edit Pencil or right click and choose Edit.

   a. If using Right Click, next click on Edit Job in the lower left corner of the Maintenance Details screen.

2. The Edit Job screen will pop up and the user can make and changes they would like to the maintenance. Then click on Save Job.
Clone the Maintenance

1. Click on the Maintenance ID (or right click and choose clone).

2. Click on Clone Job in the lower left corner of the Job Details screen.

3. A new window will pop up for the user to make copies of the maintenance. The user will click in the drop down to choose a number from 1-10 of how many copies they would like to make of this job.

4. The user can make any changes they would like to the Job Name, Job Description, Target and the Job Assignee and Job Due Date. Then click on Submit.
Delete the Maintenance

1. Click on the **Maintenance ID** or right click and choose **Delete**.

2. If clicked on job, find the Delete job button on the lower left side. Click on **Delete Job** in the lower left corner of the Job Details screen.

3. Click on **Proceed** and the maintenance will be deleted.
Import Maintenance

Use the Import button on the main Maintenance page to upload multiple maintenance job with a spreadsheet upload. All imported jobs will be with the same template and triggered by due date only. After uploading these jobs, you can always edit individual jobs to use odometer, runtime, or pto runtimes as triggers, instead of or in addition to the due date that you uploaded.

1. Click Import

![Import button on Maintenance page]

2. Download the template by clicking Download File Template.

![Download File Template button]

3. Add the details of your maintenance job tickets to the spreadsheet. Save your file as a .csv to your computer.

![Spreadsheet template]

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4. Select the file from your computer and also select which template you want to use for these jobs.

5. After you’ve selected your file, chosen the template, now choose Import to load the new jobs.

Maintenance List/Filter
The maintenance tab includes a filter to sort through the scheduled, in-progress, and completed maintenances on all your assets.

Note: Users can click on an asset from the left side of OneView in the menu tree and then click on the maintenance tab under that asset to see the maintenance scheduled for just that one asset.
**Scheduled Maintenance Filter**
Use the Scheduled button to see all of the New or In Progress maintenances.

**History Maintenance Filter**
Use the History button to see all of the completed maintenances that have been marked Done.

**Deleted Status**
Use the status drop down to choose Deleted jobs to view all jobs that have been deleted.
**ID Filter**

Use the ID filter to search for a specific job ID number or click the column head to sort job ID numbers in order or in reverse order. Job IDs are assigned after a maintenance job is created. This ID will appear in the printable job form and in reports.

**Name Filter**

Use the Name filter to sort or find jobs by name. Click the column head to sort in alpha-numeric order or click again to reverse the order.

**Description Filter**

Use the Description filter to sort or find jobs by name. Click the column head to sort in alpha-numeric order or click again to reverse the order.
**Type Filter**
Choose the type of job to filter by clicking in the filter box and choosing a type. OR click on the column head to sort the types in alphabetical order. Click again to sort in reverse order.

<table>
<thead>
<tr>
<th>Description</th>
<th>Type</th>
<th>Target</th>
<th>Assignee</th>
<th>Due Date</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No Template</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General Maintenance</td>
<td>Driver</td>
<td></td>
<td></td>
<td>10/05/20</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Failed Inspection</td>
<td></td>
<td></td>
<td>07/09/18</td>
<td>05/11/20</td>
</tr>
<tr>
<td>Oil Change</td>
<td>Courier Van</td>
<td></td>
<td></td>
<td>08/09/18</td>
<td>06/14/20</td>
</tr>
<tr>
<td></td>
<td>Oil Change</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Target Filter**
Use the Target filter to select the assets you want to see on your maintenance page. Click the column head to sort in alpha-numeric order or click again to reverse the order.

<table>
<thead>
<tr>
<th>Target</th>
<th>Assignee</th>
<th>Due Date</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excavator</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kenworth 200</td>
<td>AC-10</td>
<td>07/27/18</td>
<td>10/09/18</td>
</tr>
<tr>
<td>Courier Van 22</td>
<td>Courier Van 22</td>
<td>08/09/18</td>
<td>06/14/18</td>
</tr>
<tr>
<td>Courier Van 22</td>
<td>Courier Van 22</td>
<td>08/13/18</td>
<td>08/07/18</td>
</tr>
</tbody>
</table>

**Assignee Filter**
Use the Assignee filter to select or sort by Assignee. Click the column head to sort in alpha-numeric order or click again to reverse the order.

<table>
<thead>
<tr>
<th>Target</th>
<th>Assignee</th>
<th>Due Date</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>AC-10</td>
<td>Pedigree Trainer</td>
<td>01/22/2016</td>
<td>09/15/2016</td>
<td>09/15/2016</td>
</tr>
<tr>
<td>Kenworth 200</td>
<td>Pedigree Trainer</td>
<td>02/01/2018</td>
<td>07/27/2018</td>
<td>07/27/2018</td>
</tr>
<tr>
<td>Mck 56</td>
<td>Pedigree Trainer</td>
<td>07/23/2015</td>
<td>09/24/2015</td>
<td>09/24/2015</td>
</tr>
</tbody>
</table>
Due Date Filter
Use the Due Date filter to sort maintenances in order of due date or in reverse due order. Click in the due date filter to select a time range for your results such as the Next 7 Days.

Start Date/End Date
On completed or in progress maintenances, the Start Date and End Dates will show you when the job was completed or when the job was started and subsequently completed.
Recurring Filter
In the recurring column, True means that the maintenance is recurring and False means it is a one-time job.

Edit Column
The edit pencil in the last column allows you to edit the original maintenance ticket.

Maintenance tab under assets
Each of the assets has a separate Maintenance Tab under it. This tab will display maintenances that were assigned to that asset. When the Maintenance Tab is clicked, it will default to the Scheduled maintenances. If the user would like to see past maintenances they will need to click on History. If the asset has many maintenances the user can Filter through them here too.
Maintenance Templates

Oil Change
Use the oil change template, or any template, to customize your maintenance jobs.

General Maintenance
The General Maintenance template includes triggers for 2\textsuperscript{nd} and 3\textsuperscript{rd} PTO’s if you are monitoring multiple PTO’s. If you are not monitoring multiple PTO’s, you will still see the triggers but they will not do anything for your assets. Only set triggers up for the parameters you are gathering data on.
Maintenance
This template uses just a due date trigger.

Failed Inspection
This ticket can be auto-created through alarms, but you also have access to it in the template choices. It is a due date only template.
Driver Maintenance

HOS managers or safety managers can use the Driver template to schedule reminders for license renewals or other certification renewals for drivers or other users.

Reset Odometer and Runtimes

If an asset’s odometer or runtime(s) become off within OneView, you can reset them on the asset’s summary page. You may need to have this permission added to your account if you do not see the set column shown in the image below. Use the set links to reset all or any of the odometer or runtimes for the asset.
Enter the last known odometer and click the Date/Time field to enter the date and time of that last known odometer/runtime.

Use Alarms to Create Maintenance Jobs
You can use the create job setting in the alarm configurations to have a maintenance ticket created automatically by OneView. A common use of this is for failed inspections or offline assets, but there are other alarms that may be useful to set and create maintenance jobs.

To configure an alarm so that it creates a maintenance job, follow these steps. (For in-depth detail about alarms, download the Alarms document from the Help tab.)

1. Click on your Settings link (top right)
2. Click Alarm Configuration (center top of content area)
3. Click Configure a New Alarm
1. Choose an alarm from the Alarm Templates
2. Optional customize Alarm Config Name
3. Severity – set to Notice, Warning or Critical
4. Optional customize Alarm Config Description
5. Set the Conditions
6. Set the notifications
7. Optional set filters.
8. Under Workflow
   a. Click Create Job
   b. Choose from the maintenance templates
   c. Set the due date to any amount of time.
9. Set which assets this alarm should be on.
10. Save.
Alarm Generated Maintenance Jobs

Maintenance jobs generated by an alarm will display in the maintenance list as having been from the particular alarm that was set. For example, the following is what you would see for an inspection failure alarm.

<table>
<thead>
<tr>
<th>Status</th>
<th>ID</th>
<th>Name</th>
<th>Description</th>
<th>Type</th>
<th>Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>7042811</td>
<td>1546898381</td>
<td>Inspection Failure: [NOTICE] Alarm: [Inspection Failure]</td>
<td>Failed Inspection</td>
<td>Mack 56</td>
</tr>
<tr>
<td>New</td>
<td>7042812</td>
<td>1546898392</td>
<td>Inspection Failure: [NOTICE] Alarm: [Inspection Failure]</td>
<td>Failed Inspection</td>
<td>AC-10</td>
</tr>
<tr>
<td>New</td>
<td>784555</td>
<td>15532716145</td>
<td>Failed Inspection Repair:</td>
<td>Failed</td>
<td></td>
</tr>
</tbody>
</table>

When you look at the job details for a ticket that was generated by an alarm, it will show the Job Description as the alarm that sounded. The Target shows which asset the alarm sounded on. The Notes include alarm details, such as the inspection notes from the driver, when the alarm sounded (when the inspection defect was marked by the driver for example.)