



**OneView™**  
Pedigree Technologies

# Maintenance

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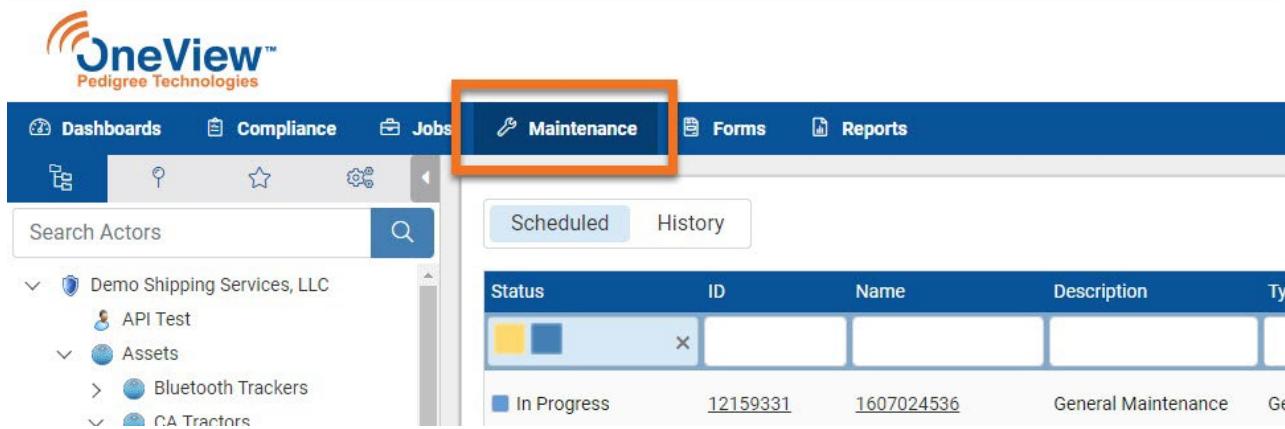
## Maintenance

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.

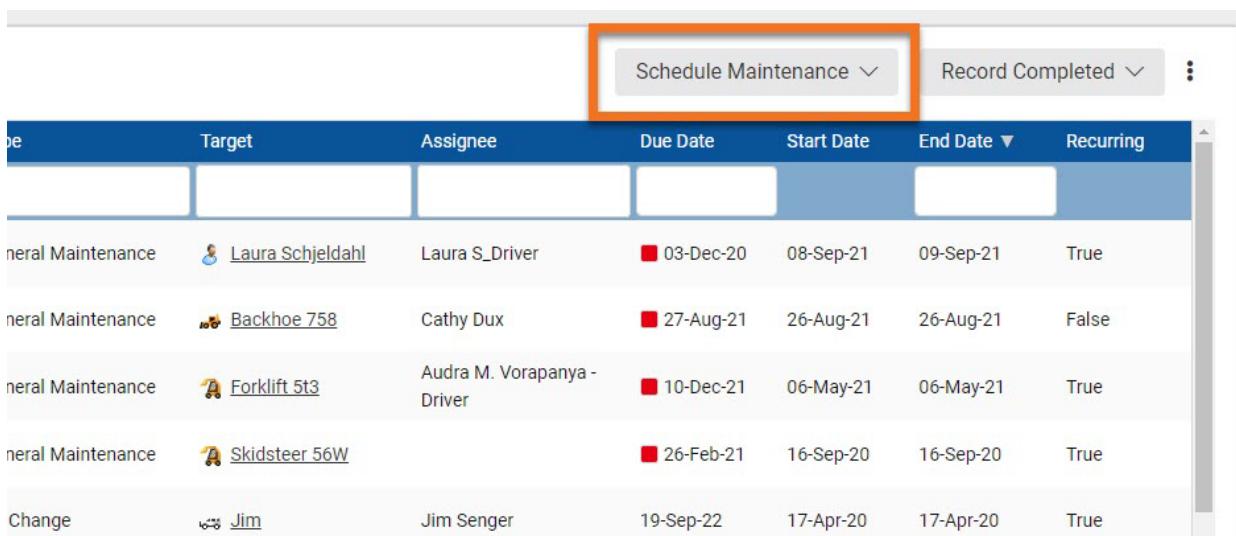
### How to set up a Scheduled Maintenance (for future completion)

When users are ready to set up scheduled maintenance ticket for a future service, simply follow the procedure below.

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

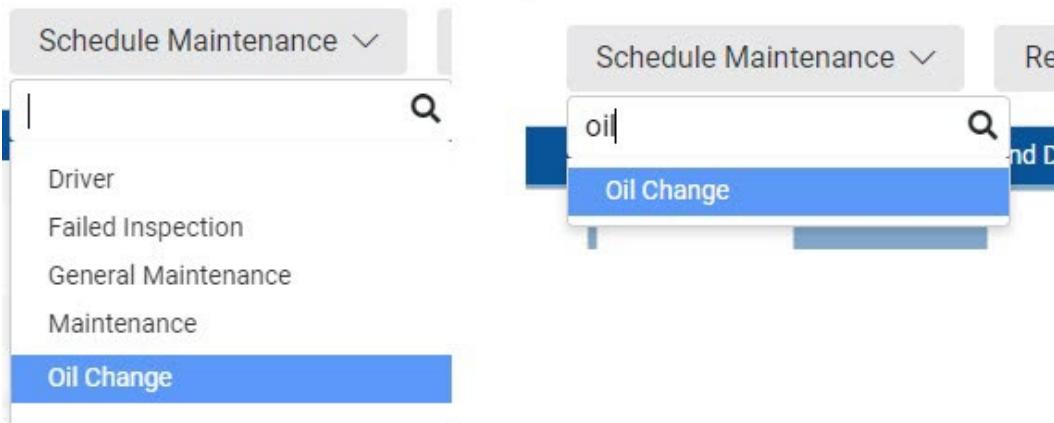


2. Click on **Schedule Maintenance**



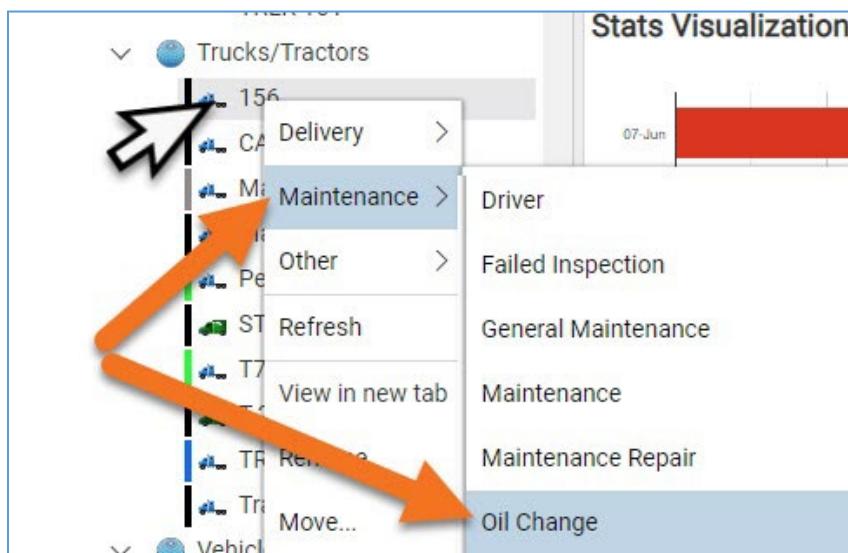
Type	Target	Assignee	Due Date	Start Date	End Date	Recurring
General Maintenance	Laura Schjeldahl	Laura S_Driver	03-Dec-20	08-Sep-21	09-Sep-21	True
General Maintenance	Backhoe 758	Cathy Dux	27-Aug-21	26-Aug-21	26-Aug-21	False
General Maintenance	Forklift 5t3	Audra M. Vorapanya - Driver	10-Dec-21	06-May-21	06-May-21	True
General Maintenance	Skidsteer 56W		26-Feb-21	16-Sep-20	16-Sep-20	True
Change	Jim	Jim Senger	19-Sep-22	17-Apr-20	17-Apr-20	True

Choose the maintenance template from the drop-down or type in the name of the maintenance template you want to use.



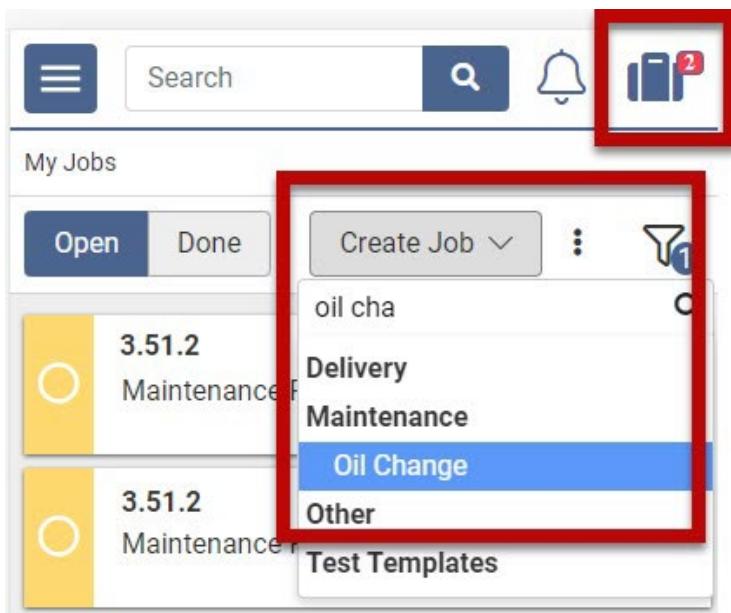
**OR**

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.

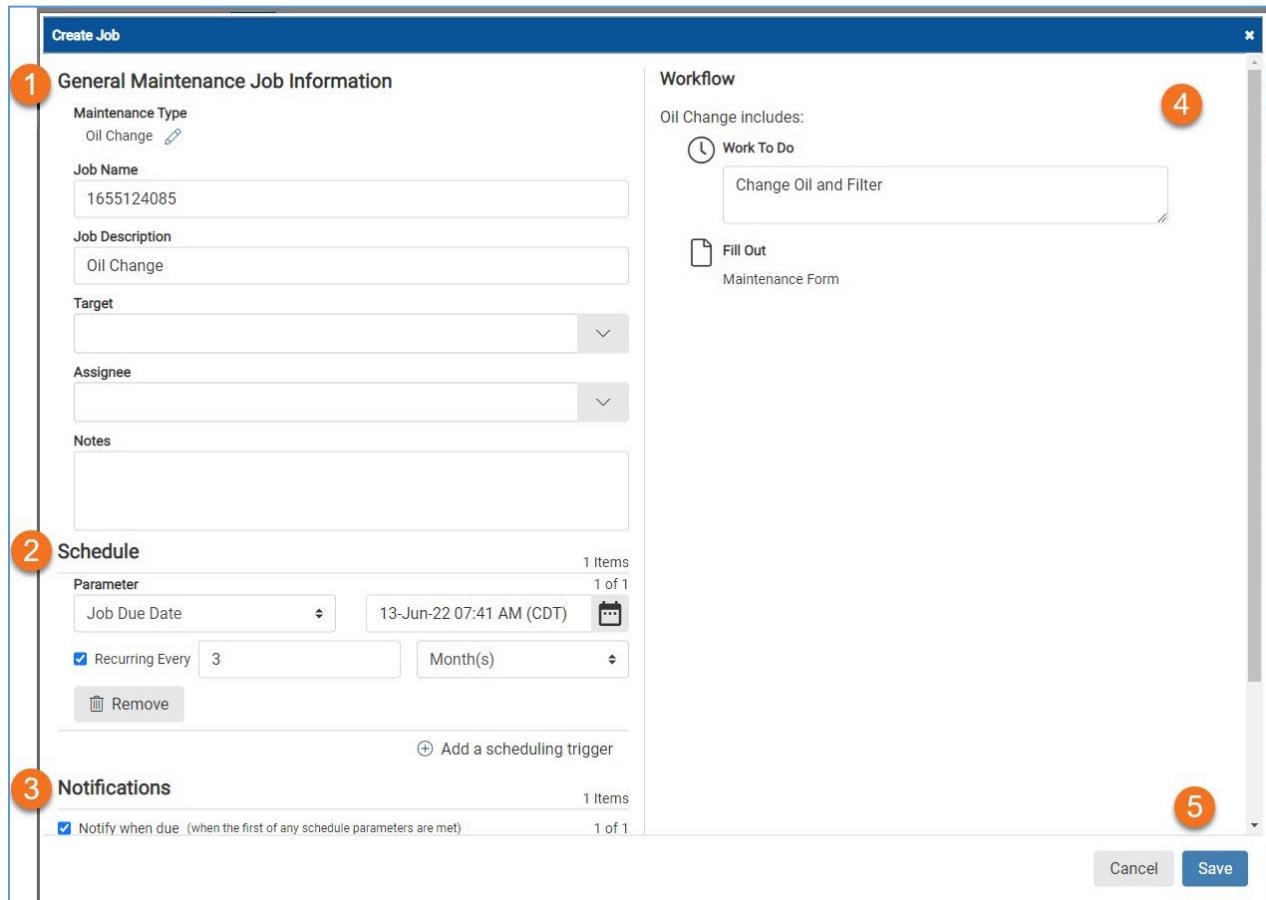


**OR**

In OneView Mobile, tap on the suitcase icon at the top, then **Create Job** and choose your template.



Fill out the maintenance template



The 'Create Job' dialog box is open, divided into several sections:

- General Maintenance Job Information** (Section 1): Contains fields for Maintenance Type (Oil Change), Job Name (1655124085), Job Description (Oil Change), Target, Assignee, and Notes.
- Schedule** (Section 2): Contains a Parameter field (Job Due Date set to 13-Jun-22 07:41 AM (CDT)), a Recurring Every field (set to 3 Month(s)), and a 'Remove' button.
- Notifications** (Section 3): Contains a checkbox for 'Notify when due' (when the first of any schedule parameters are met).
- Workflow** (Section 4): Shows 'Oil Change includes:' with a 'Work To Do' step labeled 'Change Oil and Filter'.
- Buttons** (Section 5): Includes 'Cancel' and 'Save' buttons at the bottom right.

## Section 1: General Maintenance Job Information

**Maintenance Type:** this is the template you chose. Use the edit pencil to change to a different template.

**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.

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

**Assignee:** Click on the drop down and choose Select Assignee, type a name to search, or click on the file icon to select from your asset tree. Assignee is optional.

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

## Section 2: Schedule

**Parameter:** choose between Job Due Date, Odometer, Runtime, PTO Runtime triggers (see schedule section below).

## Section 3: Notifications

**Notify when due:** check this box to add a notification when any of your triggers have been met. (See Notification section below)

## Section 4: Workflow

**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: After you save this job, the maintenance form will be available to fill out.

## Section 5: Save or Cancel

# Schedule

You can schedule your maintenance ticket a number of ways. You can choose a due date, a due odometer reading, a due runtime reading, or due PTO reading for each PTO on your asset. In addition to scheduling by chosen parameter, you can also make the ticket recurring by those chosen parameters.

**Schedule**

Parameter		2 Items	
Job Due Date	<input type="button" value="▼"/>	Job Due Date	<input type="button" value="▼"/>
<input checked="" type="checkbox"/> Job Due Date		06/10/2021 08:48 AM	<input type="button" value="Calendar"/>
Runtime			
Pto Run Time			
Secondary Runtime			
Pto2 Run Time			
<input type="button" value="Remove"/>			
<input checked="" type="checkbox"/> Recurring Every		3	Month(s)
<input type="button" value="Remove"/>			
Parameter		1 of 2	
Odometer	<input type="button" value="▼"/>		
<input checked="" type="checkbox"/> Recurring Every	3000.0		
<input type="button" value="Remove"/>			
<a href="#">⊕ Add a scheduling trigger</a>			

By default on some templates, like this Oil Change template, may have one or a few parameters already selected. You can remove any unwanted parameter by clicking the Remove button.

### Schedule

Parameter		2 Items	
Job Due Date	<input type="button" value="▼"/>	06/10/2021 08:48 AM	<input type="button" value="Calendar"/>
<input checked="" type="checkbox"/> Recurring Every	3	Month(s)	<input type="button" value="▼"/>
<input type="button" value="Remove"/>			
Parameter		2 of 2	
Odometer	<input type="button" value="▼"/>		
<input checked="" type="checkbox"/> Recurring Every	3000.0		
<input type="button" value="Remove"/>			
<a href="#">⊕ Add a scheduling trigger</a>			

## Setting Parameters

Choose your parameter from the dropdown menu.

Set the parameter trigger, either a date, an odometer reading, runtime reading or PTO reading. This should be a future reading. (If service has already been done, use the Record Completed maintenance option.)

Recurring Every: check to make this a recurring maintenance. Set the recurring trigger, date for due date, miles for odometer, hours for runtime and PTO runtime.

### Schedule

Parameter		2 Items	
Job Due Date	<input type="button" value="▼"/>	06/10/2021 08:48 AM	<input type="button" value="Calendar"/>
<input checked="" type="checkbox"/> Recurring Every	3	Month(s)	<input type="button" value="▼"/>
<input type="button" value="Remove"/>			
Parameter		2 of 2	
Odometer	<input type="button" value="▼"/>		
<input checked="" type="checkbox"/> Recurring Every	3000.0		
<input type="button" value="Remove"/>			
<a href="#">⊕ Add a scheduling trigger</a>			

Future Date

Future Odometer

## Add a scheduling trigger.

Use the plus button to add as many scheduling triggers as you require.

### Schedule

Parameter	Value	Action
Job Due Date	06/10/2021 08:48 AM	<input type="button" value="Remove"/>
<input checked="" type="checkbox"/> Recurring Every	3	Month(s)
<input type="button" value="Remove"/>		
Parameter	2 of 2	
Odometer		
<input checked="" type="checkbox"/> Recurring Every	3000.0	
<input type="button" value="Remove"/>		
<a href="#">⊕ Add a scheduling trigger</a>		

## Notifications

Add notifications if you want yourself or someone else to receive an email or a text when the maintenance job is due. You can also add an advance warning text or email ahead of the scheduled maintenance.

### Set Notification

Click the check box under Notifications

Notifications	
<input type="checkbox"/> Notify when due (when the first of any schedule parameters are met)	<a href="#">Add a scheduling trigger</a>

Enter the name(s) of the user who need to receive a notification whenever any of the schedule parameters have been met.

Notifications	Action
<input checked="" type="checkbox"/> Notify when due (when the first of any schedule parameters are met)	1 Items 1 of 1
<b>Notify</b>	
<input type="button" value="Add a scheduling trigger"/>	
via	Email
<a href="#">⊕ Add early notification</a>	

Choose if they want email, text or both.

**Notifications** 1 Items

Notify when due (when the first of any schedule parameters are met) 1 of 1

**Notify**

Andrew Jacobson ▼

via Email Email Text Email & Text



⊕ Add early notification

## Example

**Notifications** 2 Items

Notify when due (when the first of any schedule parameters are met) 1 of 2

**Notify**

Andrew Jacobson ▼

via Email Email

## Add Early Notification

To get notified ahead of time for any trigger you've set, click the Add Early Notification button

**Notifications** 2 Items

Notify when due (when the first of any schedule parameters are met) 1 of 2

**Notify**

Andrew Jacobson ▼

via Email Email

⊕ Add early notification

Choose the parameter you want to use for early notification

**Notifications** 2 Items

Notify when due (when the first of any schedule parameters are met) 1 of 2

**Notify**

Andrew Jacobson ▼

via Email Email

**Early Notification for** 2 of 2

Odometer Runtime PTO Runtime Secondary Runtime PTO 2 Runtime Job Estimate Due Date

Remove

⊕ Add early notification

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Set how much ahead of time you want to be notified. This will be based on which parameter you select. Time for due date, miles for odometer, hours for runtime and PTO runtime.

Early Notification for 2 of 2

Odometer 100 miles/km before due

Notify

via Email

[⊕ Add early notification](#)

Add who will be notified and choose via text, email or both.

**Notifications** 2 Items

Notify when due (when the first of any schedule parameters are met) 1 of 2

Notify

Andrew Jacobson

via Email

Early Notification for 2 of 2

Odometer 100 miles/km before due

Notify

Andrew Jacobson

via Email & Text

[⊕ Add early notification](#)

## Save

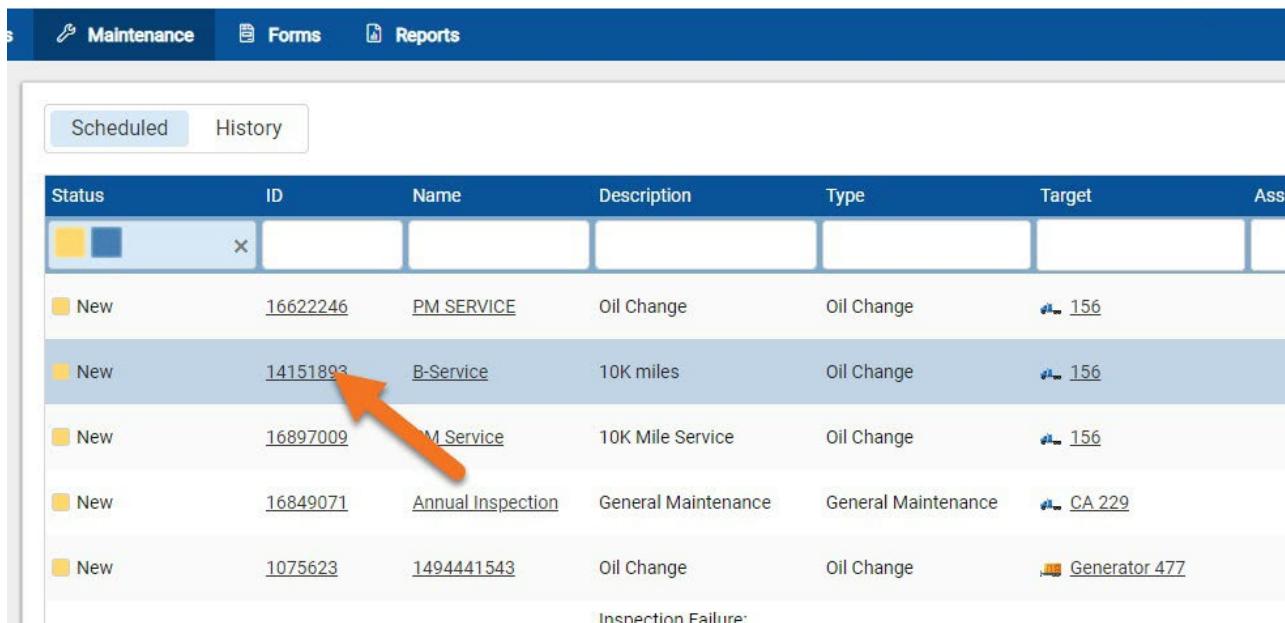
After adding all the parameters and notifications you need, choose Save.

## 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.



Status	ID	Name	Description	Type	Target	Assi
New	16622246	PM SERVICE	Oil Change	Oil Change	 156	
New	<u>14151893</u>	<u>B-Service</u>	10K miles	Oil Change	 156	
New	16897009	AM Service	10K Mile Service	Oil Change	 156	
New	16849071	Annual Inspection	General Maintenance	General Maintenance	 CA 229	
New	1075623	1494441543	Oil Change	Oil Change	 Generator 477	

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

Job Name: B-Service

Job Summary	Map	Schedule	History
Job Id 14151893 Job Name B-Service Job Description 10K miles Target 156 Assignee Not Assigned Job Status New Created By Adam Stills Creation Time Wed 21-Apr-21 03:25 PM (CDT) Due Tue 13-Jun-23 07:46 AM (CDT) Notes tire size	Change Oil and Filter Start Time Now Completion Time Now Fill Out Maintenance Form <input type="button" value="Mark as Done"/> Linked Assets Work Done Work Done By Work Done Time Now Part Form 0 Items <input type="button" value="Add Part Form"/> Total 0 <input type="button" value="Edit"/> <input type="button" value="Save"/> <input type="button" value="Save &amp; Mark All as Done"/>		
<input type="button" value="Edit Job"/> <input type="button" value="Clone Job"/> <input type="button" value="Delete Job"/>			

## 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.

Change Oil and Filter

Start Time	Completion Time	Save
Wed 01-Jun-22 03:00 PM (C) <input type="button" value="Now"/>	<input type="button" value="Now"/>	<input type="button" value="Save"/>
Fill Out Maintenance Form <input type="button" value="Mark as Done"/> Linked Assets		

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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.

The screenshot shows a step creation dialog for 'Change Oil and Filter'. The 'Save' button is highlighted with an orange box. A calendar and time picker are open, showing June 2022 with the 13th selected and the time set to 10:00 AM.

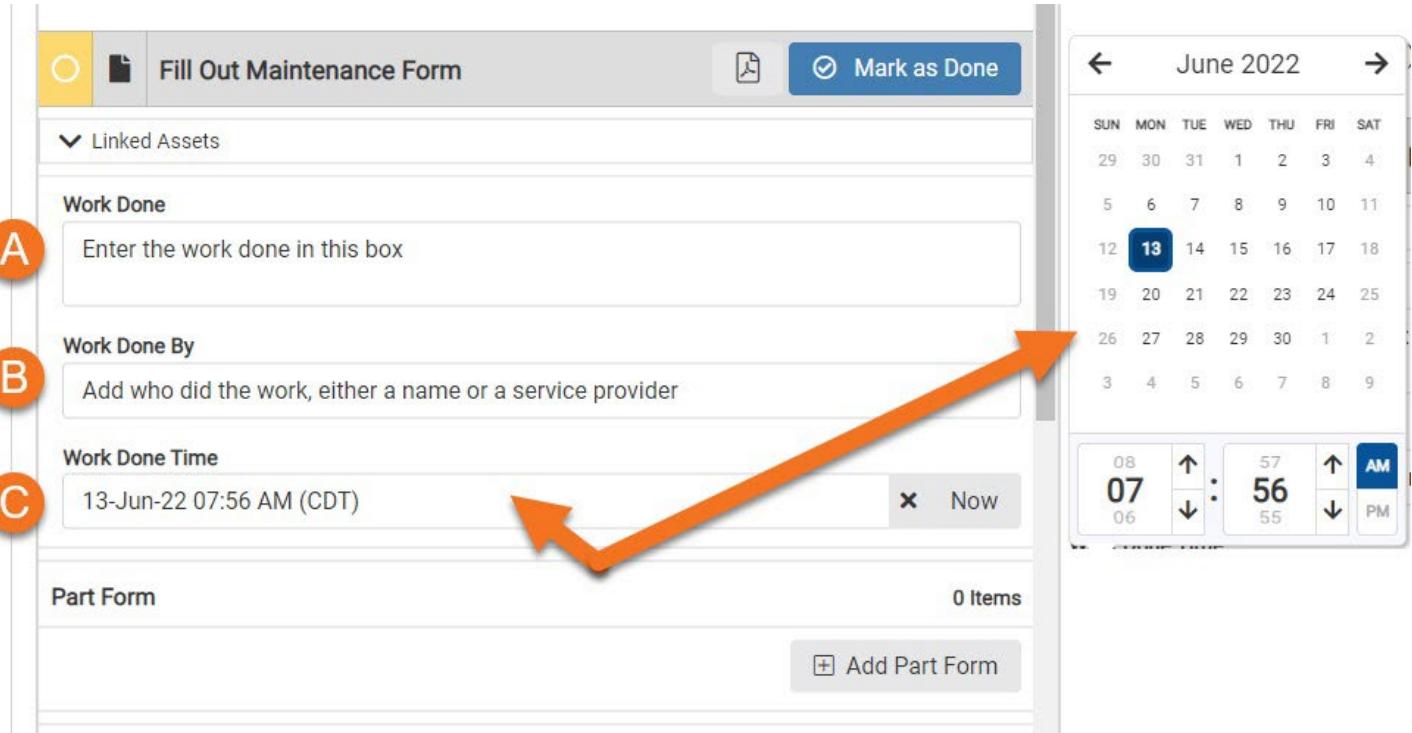
After you save the step, it will show your progress – either In Progress (blue) if you only added start time, or Done (gray) if you added both start and completion times.

The screenshot shows a list of steps. A step titled 'Change Oil and Filter' is selected and highlighted with an orange box. The 'Edit' button is visible next to it. The 'Start Time' and 'Completion Time' fields are populated with the previously entered values.

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.

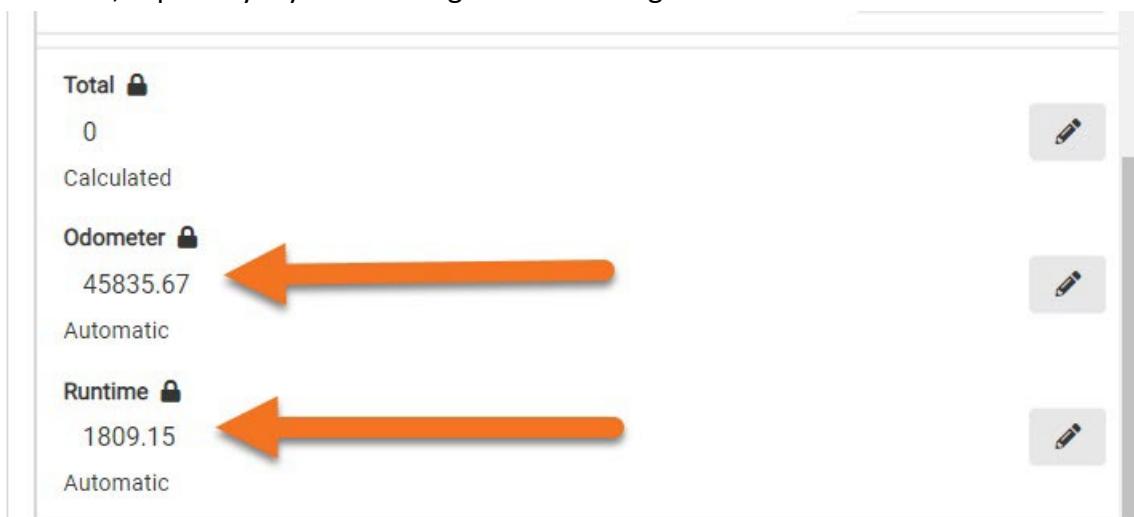


**A** Work Done – add the description of the work that was done for this maintenance. Optional.

**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.

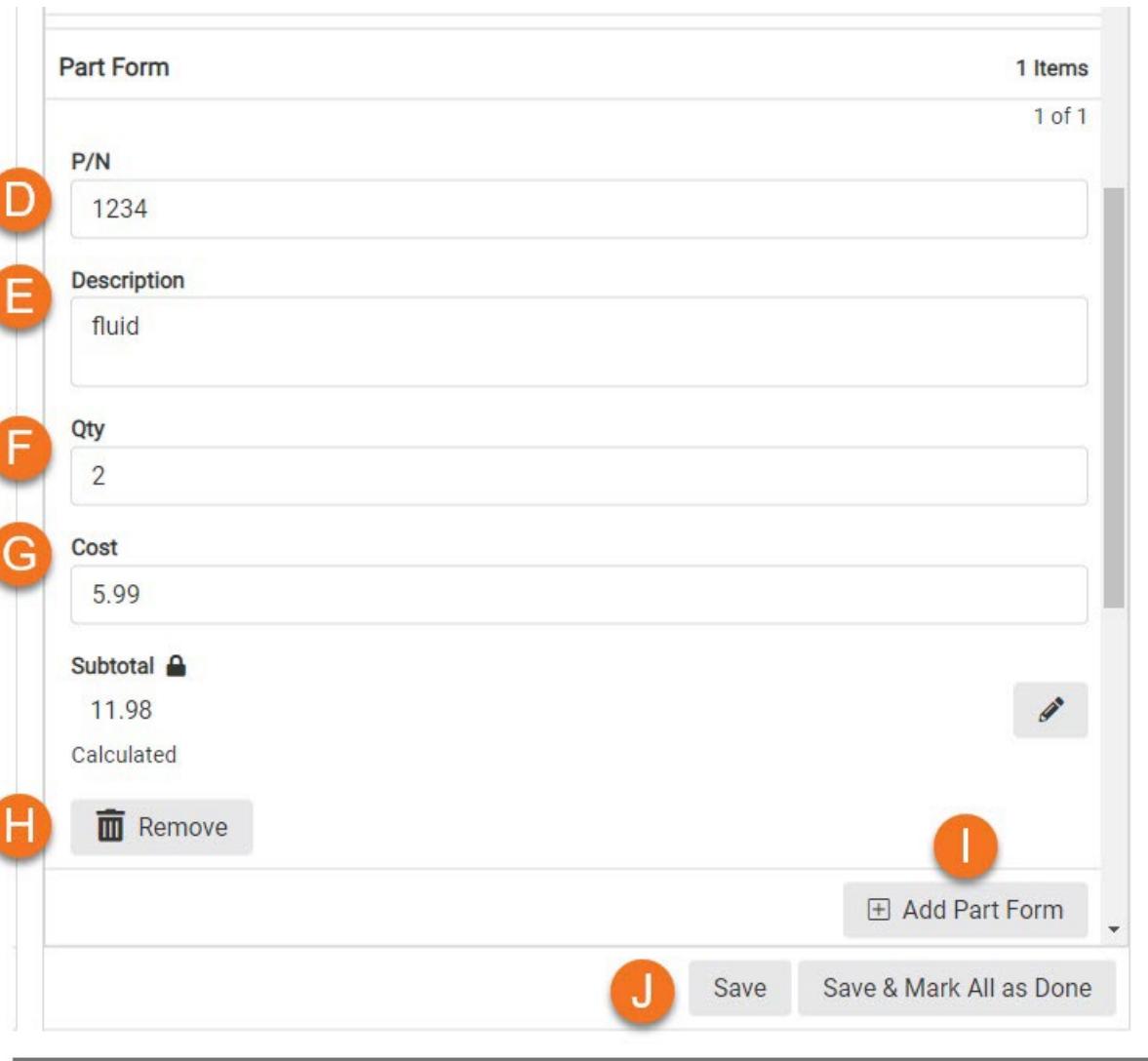
- A. **Work Done** – add the description of the work that was done for this maintenance. Optional.
- B. **Work Done By** – Add the name of the mechanic who did the work. This does not have to be a user of OneView, so you can add the name of the repair shop or an employee. This field is optional
- C. **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.



Total	0
Calculated	
Odometer	45835.67
Automatic	
Runtime	1809.15
Automatic	

## 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  
1234

**E** Description  
fluid

**F** Qty  
2

**G** Cost  
5.99

**H** Subtotal 11.98 Remove

**I** Add Part Form

**J** Save Save & Mark All as Done

- 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.

# OneView™ Maintenance

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Total	11.98
Calculated	
Odometer	45835.67
Automatic	
Runtime	1809.15
Automatic	

- 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.

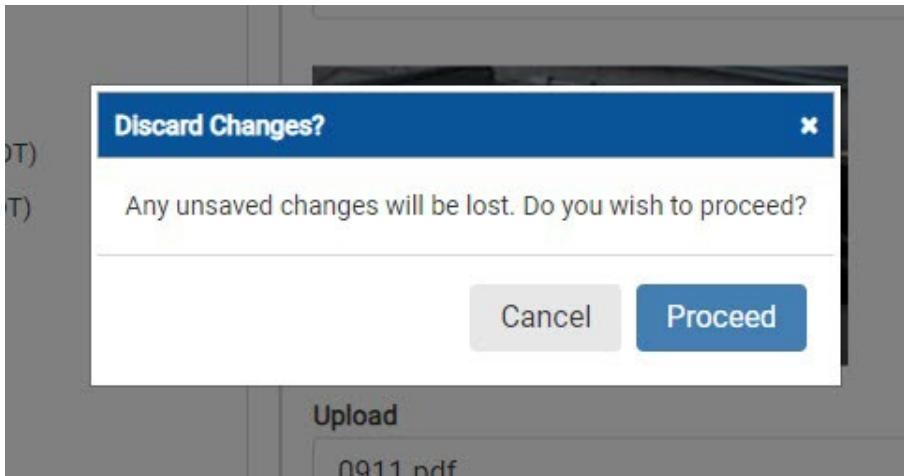
Scan	1 Items
Scan	1 of 1
oil filter example.jpeg	x Image Upload Upload Complete
	
Upload	x File Upload Upload Complete
0911.pdf	
<input type="button" value="Remove"/>	
<input type="button" value="Add Scan"/>	
<input checked="" type="button" value="Mark as Done"/>	
<input type="button" value="Save"/>	<input type="button" value="Save &amp; Mark All as Done"/>

- 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.

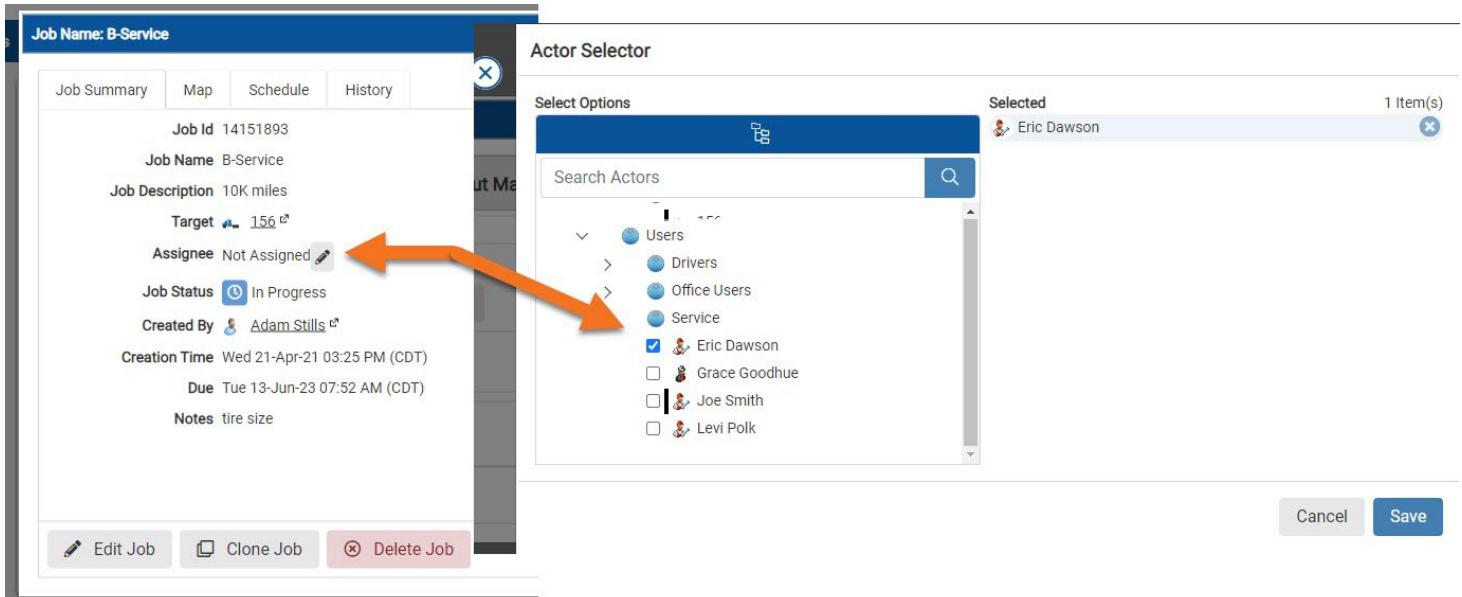
## Unsaved Changes

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.



## Job Summary Tab

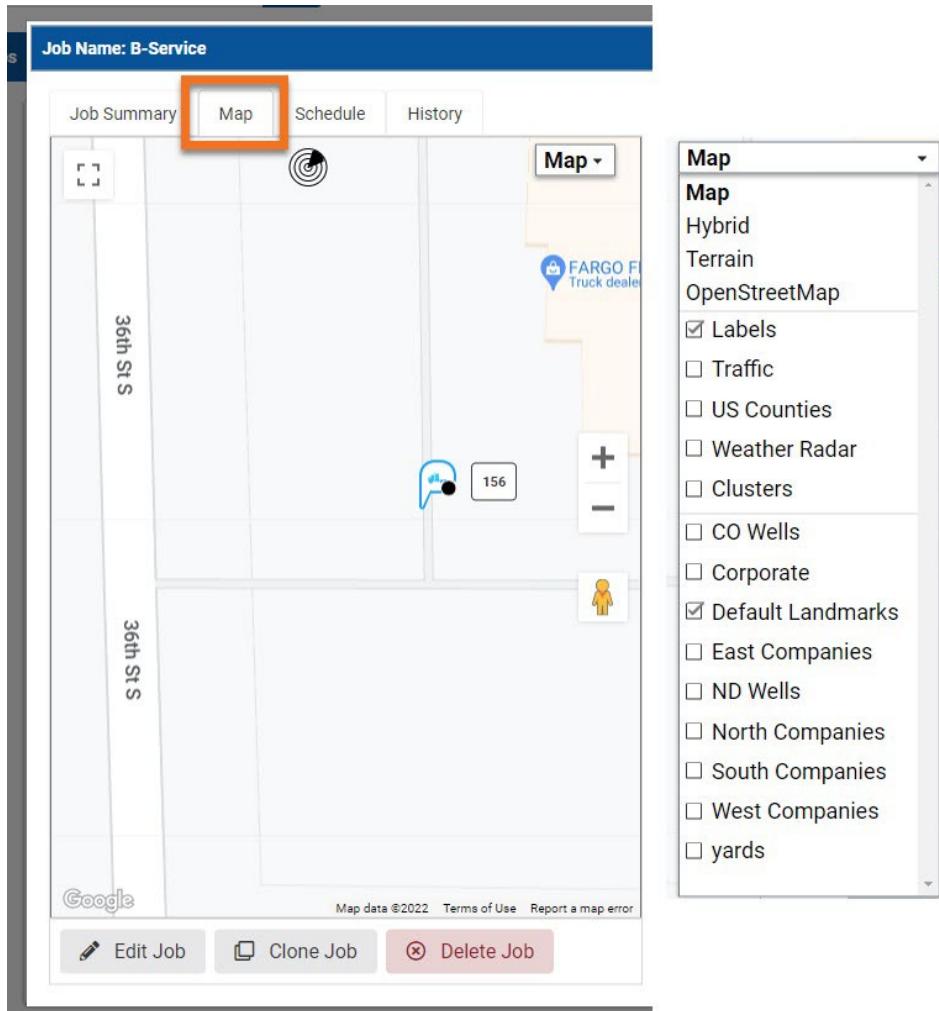
The left side of the job window includes multiple tabs. The first tab is the Job Summary. This tab includes details about the job with links to the asset (Target), assignee, the creator of the ticket, and information about Job status, when it's due, and any notes that exist. In the summary, you can now 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.



The screenshot shows the 'Job Name: B-Service' window. On the left, the 'Job Summary' tab is active, displaying job details: Job Id 14151893, Job Name B-Service, Job Description 10K miles, Target (156), Assignee Not Assigned (with a pencil icon), Job Status In Progress, Created By Adam Stills, Creation Time Wed 21-Apr-21 03:25 PM (CDT), Due Tue 13-Jun-23 07:52 AM (CDT), and Notes tire size. At the bottom are buttons for Edit Job, Clone Job, and Delete Job. On the right, a modal window titled 'Actor Selector' is open, showing a list of users under 'Select Options'. The 'Users' section is expanded, showing sub-categories: Drivers, Office Users, Service. Under 'Selected', 'Eric Dawson' is listed with a checkmark. Other users listed include Grace Goodhue, Joe Smith, and Levi Polk. Arrows point from the 'Assignee' field in the main window to the 'Selected' list in the modal.

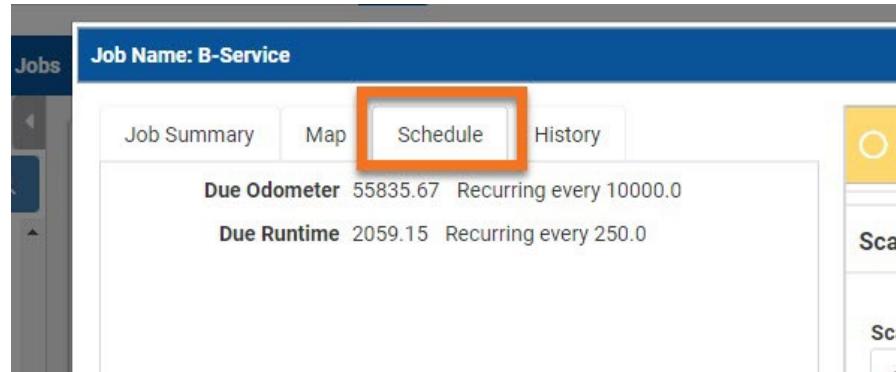
## Map Tab

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.



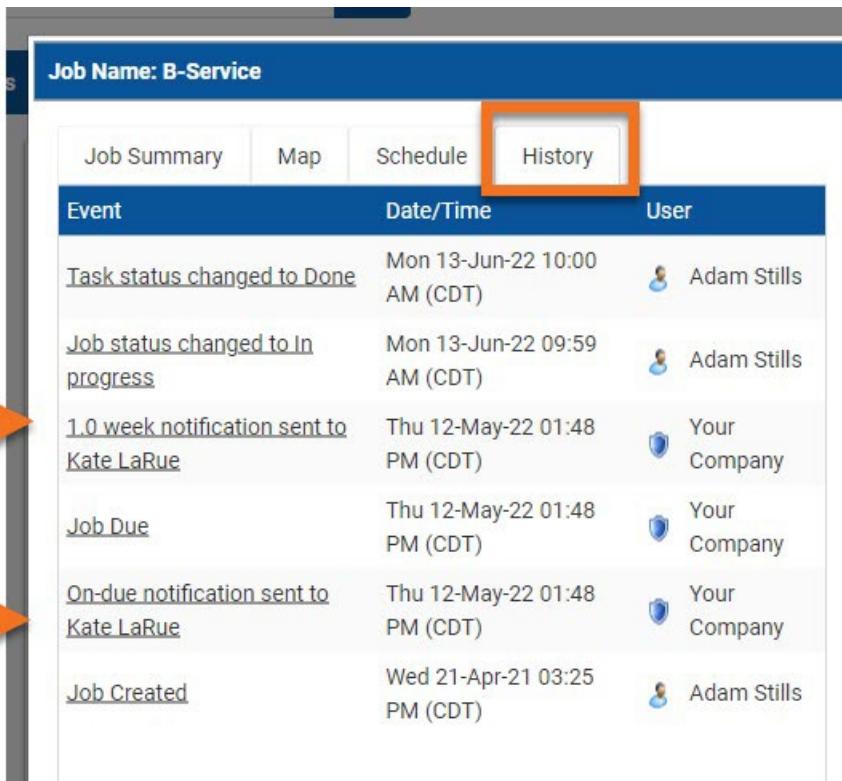
## Schedule Tab

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

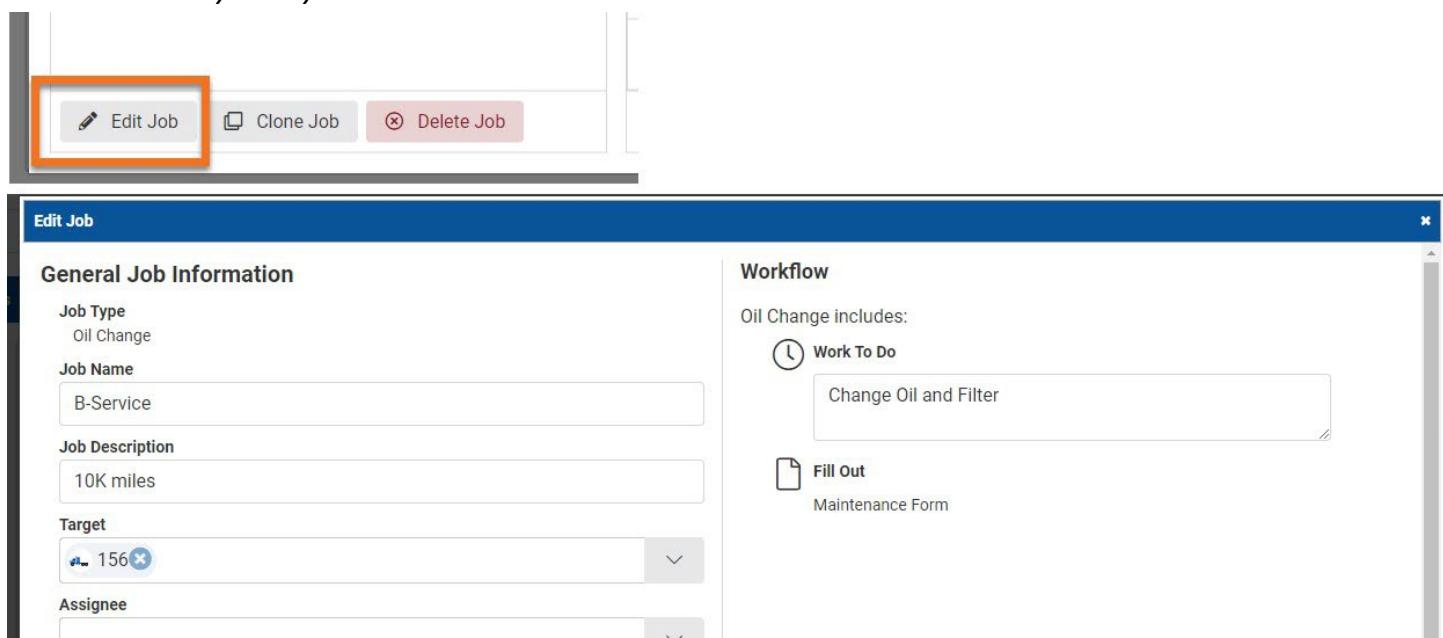
This tab shows all of the activity associated with this job. You will see when it was created and by whom, if the job reached any due triggers, if the job was altered or changed, like when a new assignee was added, and if alerts or notifications were sent out.



Event	Date/Time	User
<a href="#">Task status changed to Done</a>	Mon 13-Jun-22 10:00 AM (CDT)	Adam Stills
<a href="#">Job status changed to In progress</a>	Mon 13-Jun-22 09:59 AM (CDT)	Adam Stills
<a href="#">1.0 week notification sent to Kate LaRue</a>	Thu 12-May-22 01:48 PM (CDT)	Your Company
<a href="#">Job Due</a>	Thu 12-May-22 01:48 PM (CDT)	Your Company
<a href="#">On-due notification sent to Kate LaRue</a>	Thu 12-May-22 01:48 PM (CDT)	Your Company
<a href="#">Job Created</a>	Wed 21-Apr-21 03:25 PM (CDT)	Adam Stills

## 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.*



### Edit Job

#### General Job Information

Job Type  
Oil Change

Job Name  
B-Service

Job Description  
10K miles

Target  
 156

Assignee

#### Workflow

Oil Change includes:

Work To Do

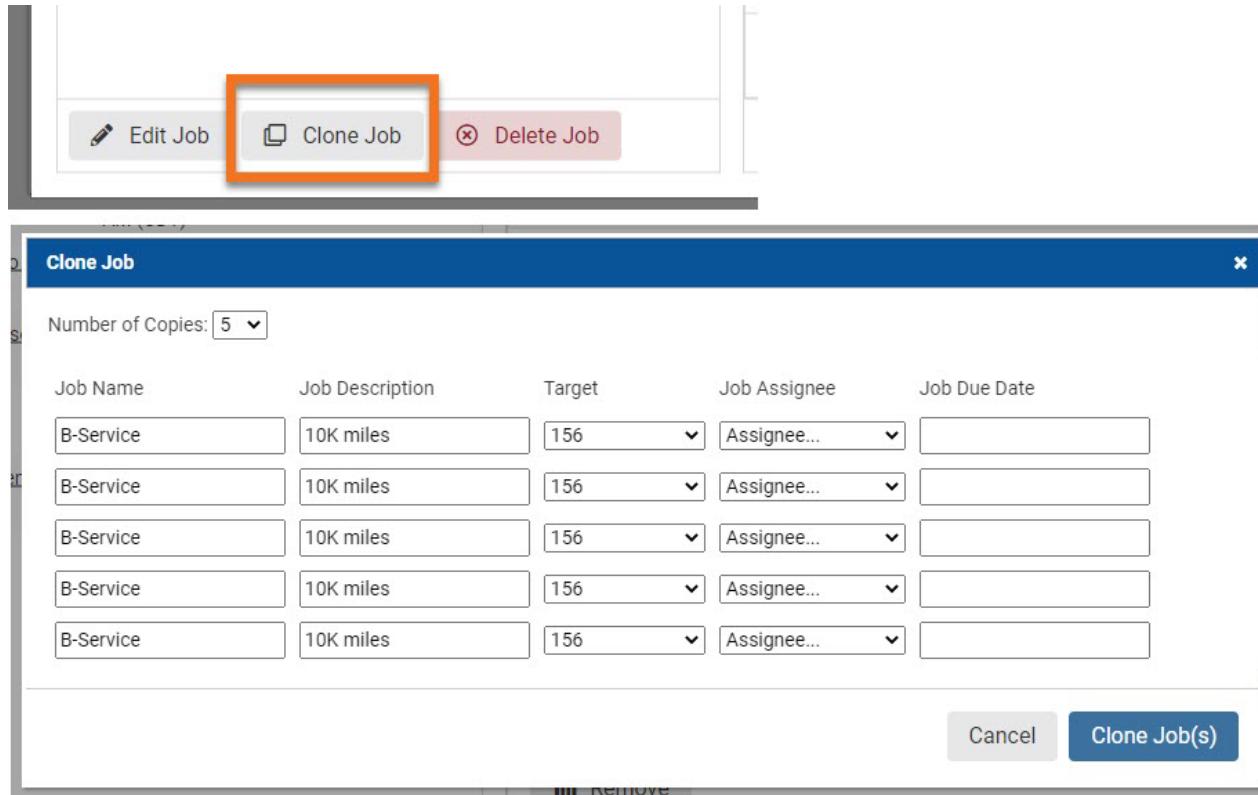
Change Oil and Filter

Fill Out

Maintenance Form

## Clone Button

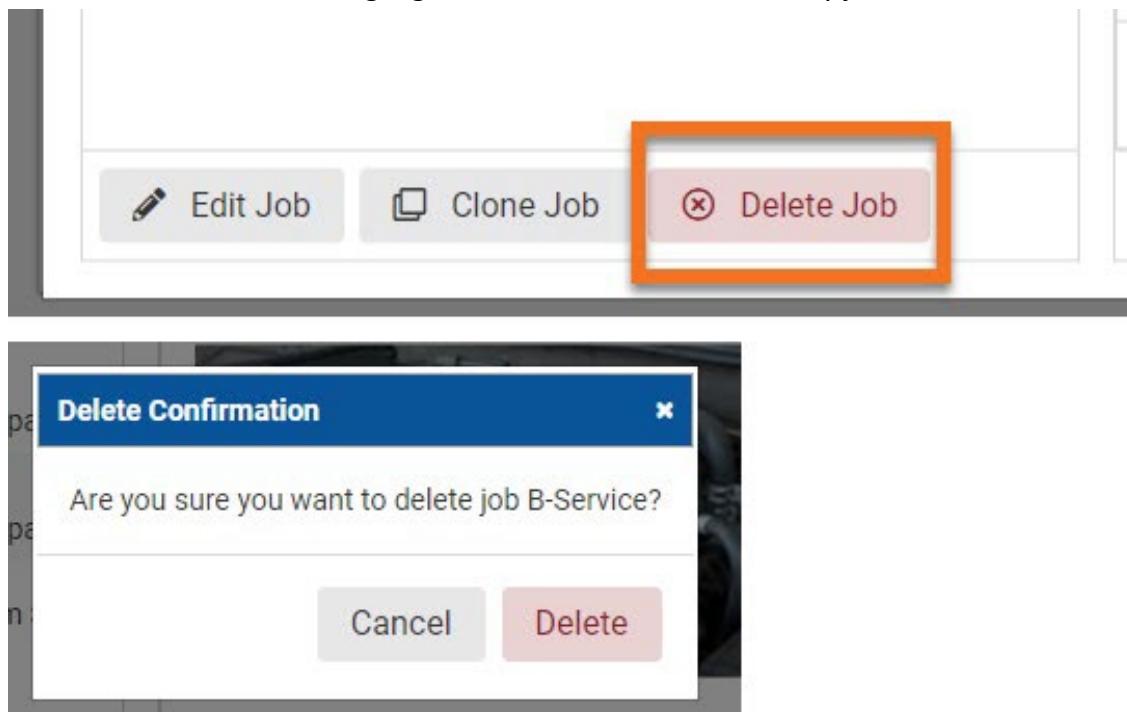
Use the clone button to make up to 10 copies of this job. You can adjust each individual job name, job description, target, assignee, and due date before submitting the cloned tickets.



The screenshot shows a software interface for managing jobs. At the top, there are three buttons: "Edit Job" (gray), "Clone Job" (highlighted with an orange box), and "Delete Job" (pink). Below this is a modal window titled "Clone Job". Inside the modal, there is a dropdown menu labeled "Number of Copies: 5". A table below lists five cloned job entries, each with fields for "Job Name" (B-Service), "Job Description" (10K miles), "Target" (156), "Job Assignee" (Assignee...), and "Job Due Date" (empty). At the bottom of the modal are two buttons: "Cancel" and "Clone Job(s)" (blue).

## Delete Button

The delete button is now highlighted in red. Use it to delete any job ticket.



The screenshot shows a software interface for managing jobs. At the top, there are three buttons: "Edit Job" (gray), "Clone Job" (gray), and "Delete Job" (highlighted with an orange box). Below this is a modal window titled "Delete Confirmation". Inside the modal, the text asks "Are you sure you want to delete job B-Service?". At the bottom of the modal are two buttons: "Cancel" and "Delete" (pink).

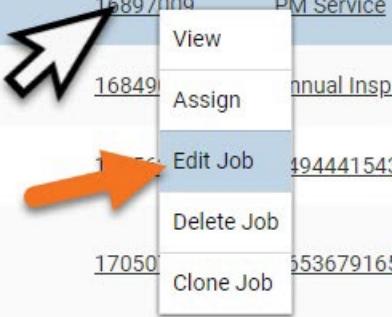
## How to Edit a Maintenance

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.

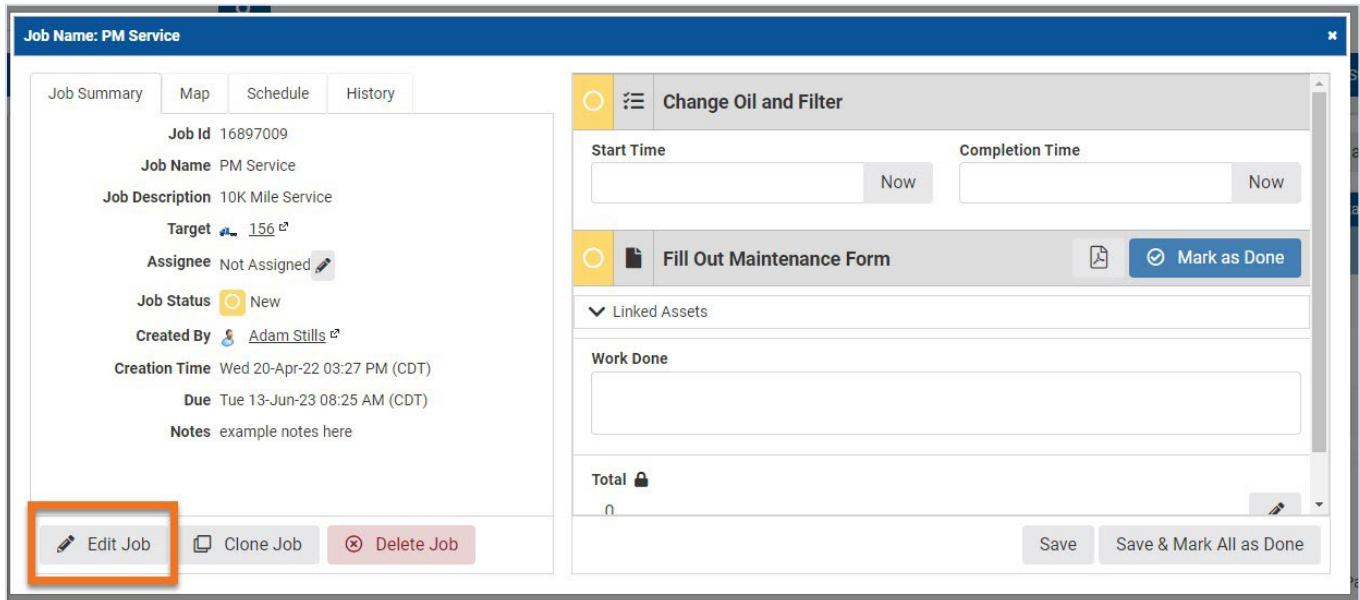
### Edit the Maintenance

1. Right click and choose Edit.

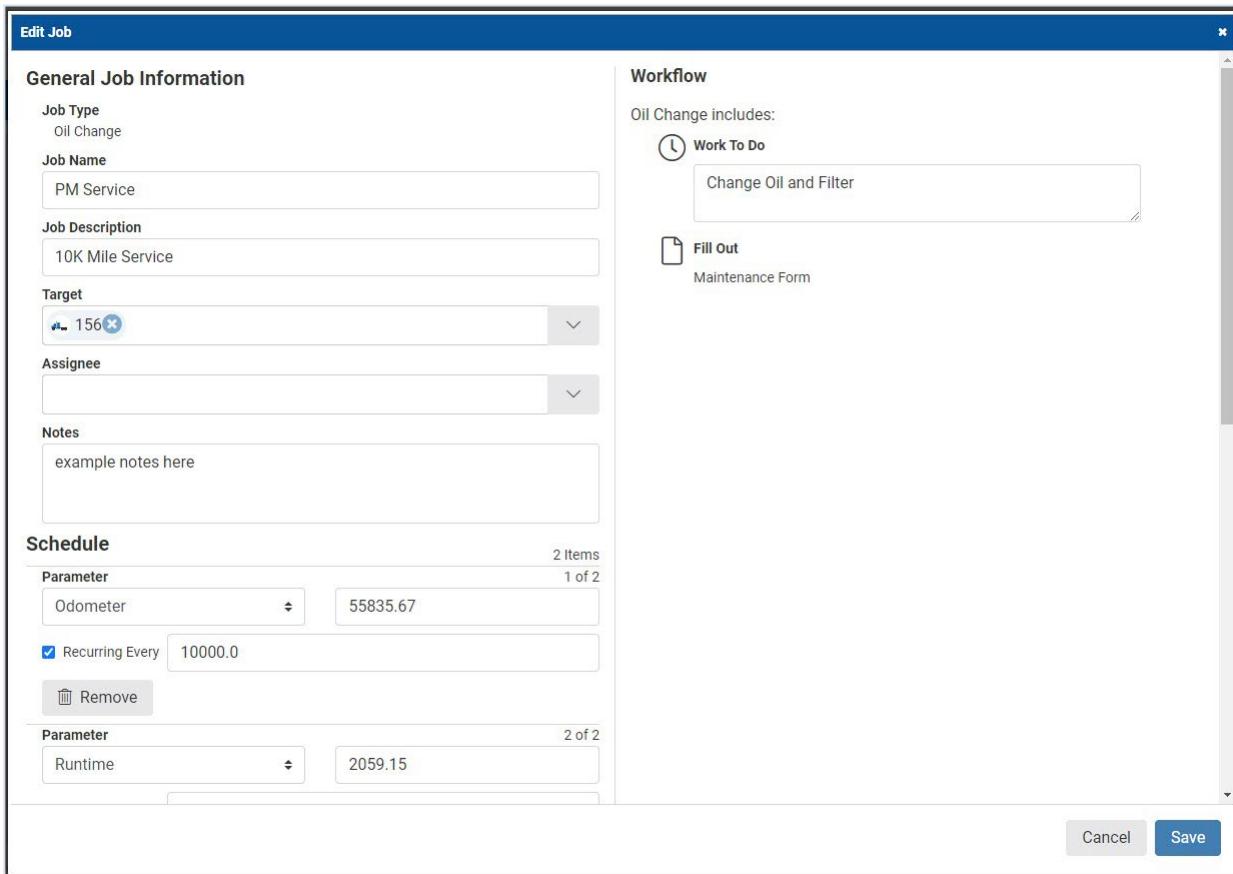
Status	ID	Name
New	<a href="#">16622246</a>	PM SERVICE
New	<a href="#">16897009</a>	PM Service
New	<a href="#">16849</a>	Annual Insp
New	<a href="#">17050</a>	10K Service
New	<a href="#">17050</a>	10K Service
New	<a href="#">17050</a>	10K Service



- a. If you clicked on the job, use the Edit Job button

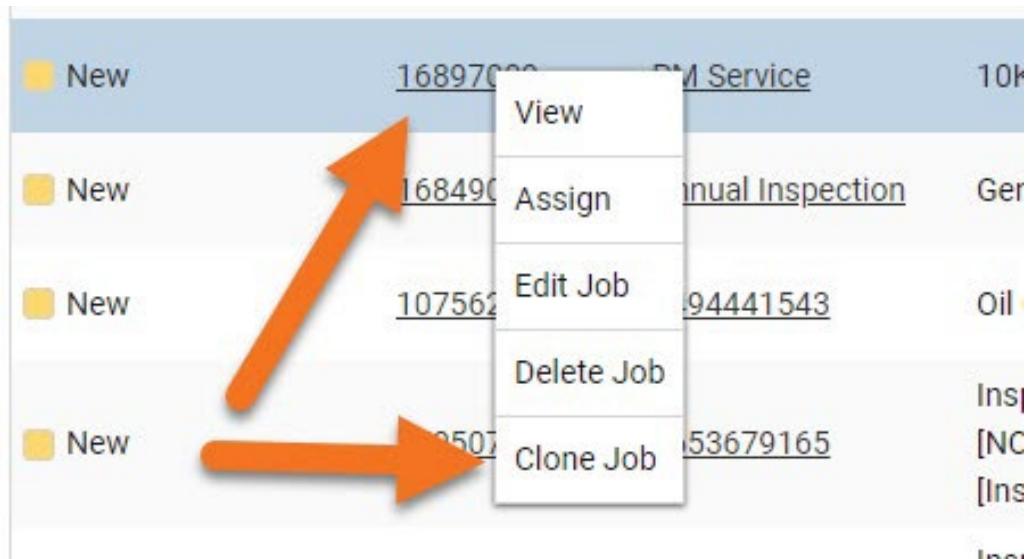


2. The Edit Job screen will pop up and the user can make changes they would like to the maintenance. Then click on **Save Job**.

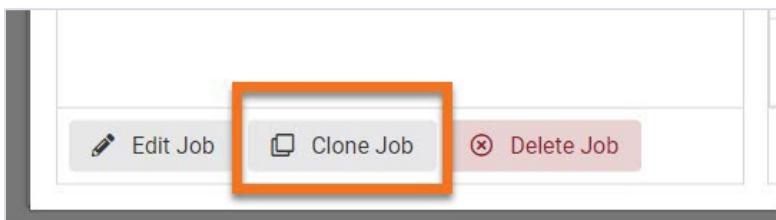


## Clone the Maintenance

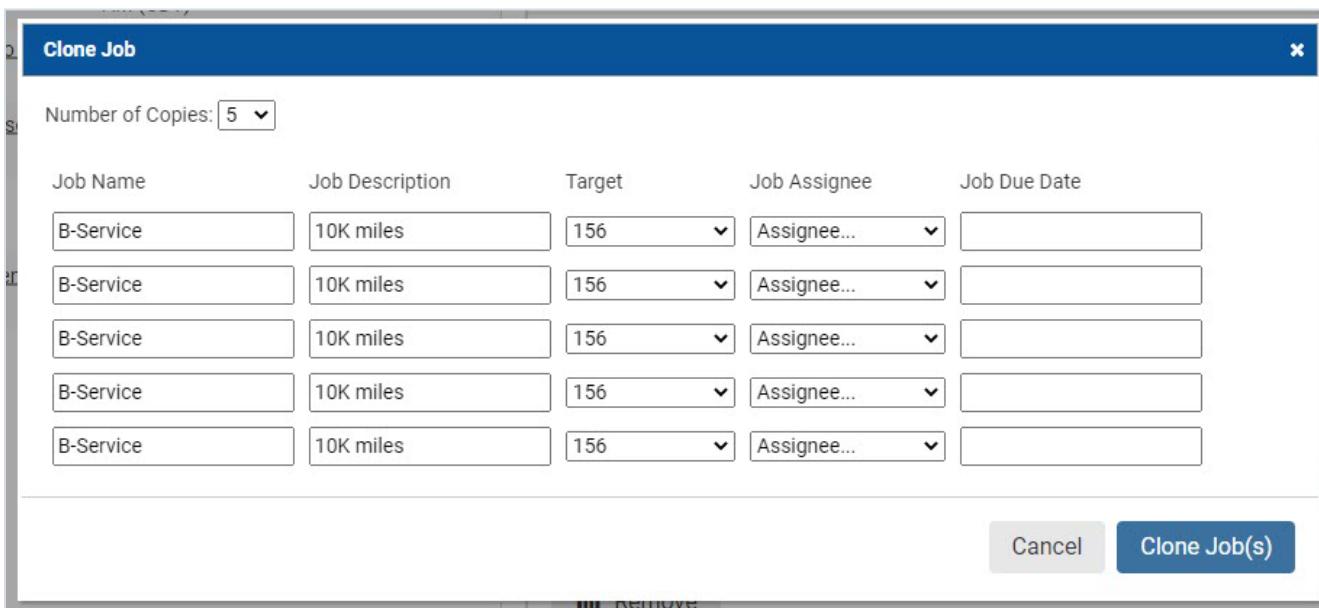
1. Click on the **Maintenance ID** (or right click and choose clone).



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



- 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.

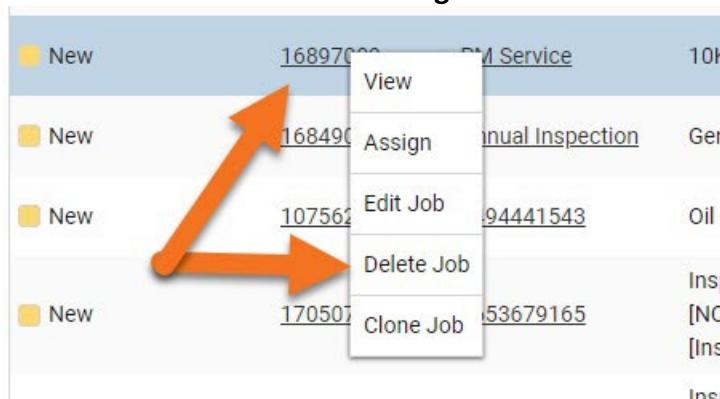


Job Name	Job Description	Target	Job Assignee	Job Due Date
B-Service	10K miles	156	Assignee...	
B-Service	10K miles	156	Assignee...	
B-Service	10K miles	156	Assignee...	
B-Service	10K miles	156	Assignee...	
B-Service	10K miles	156	Assignee...	

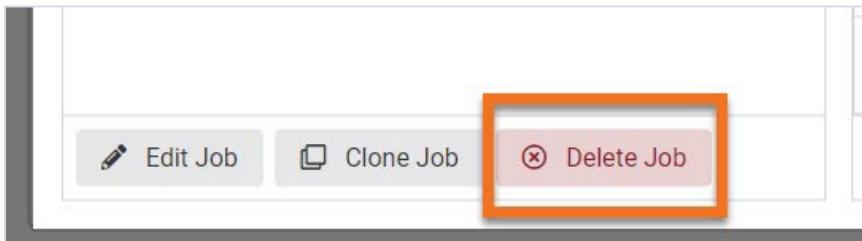
- The user can make any changes they would like to the Job Name, Job Description, Target and the Job Assignee and Job Due Date. Then click on Submit.

## Delete the Maintenance

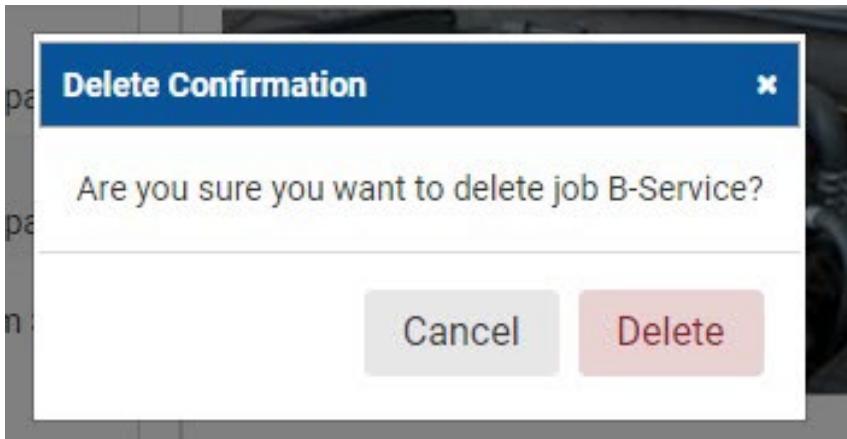
- Click on the Maintenance ID or right click and choose Delete.



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.



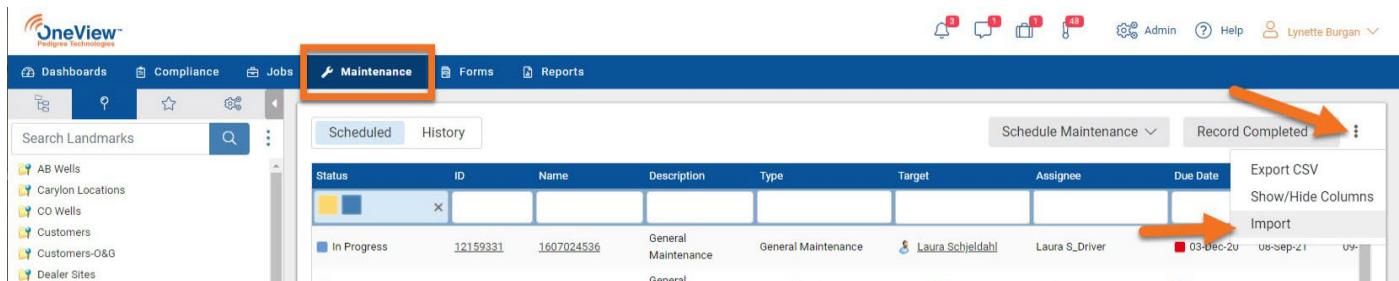
3. Click on **Proceed** and the maintenance will be deleted.



## Import Maintenance

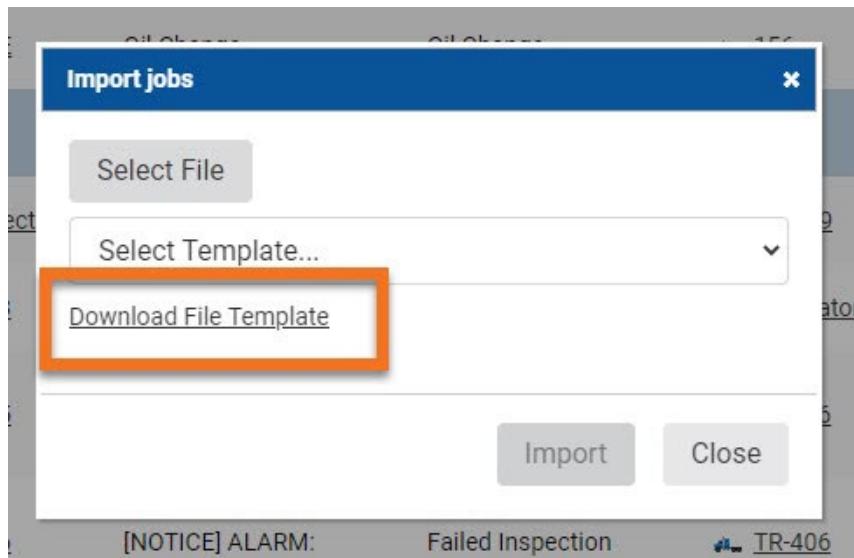
Use the Import button on the main Maintenance page to upload multiple maintenance job with a spreadsheet upload. All imported jobs will be with the same template and triggered by due date only. After uploading these jobs, you can always edit individual jobs to use odometer, runtime, or pto runtimes as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

1. Click the ellipsis menu and then Import



The screenshot shows the OneView Maintenance interface. The 'Maintenance' tab is selected. In the bottom right corner of the main table area, there is an ellipsis menu (three vertical dots) with a dropdown menu. The 'Import' option is highlighted with an orange arrow. Other options in the dropdown include 'Export CSV', 'Show/Hide Columns', and 'Record Completed'.

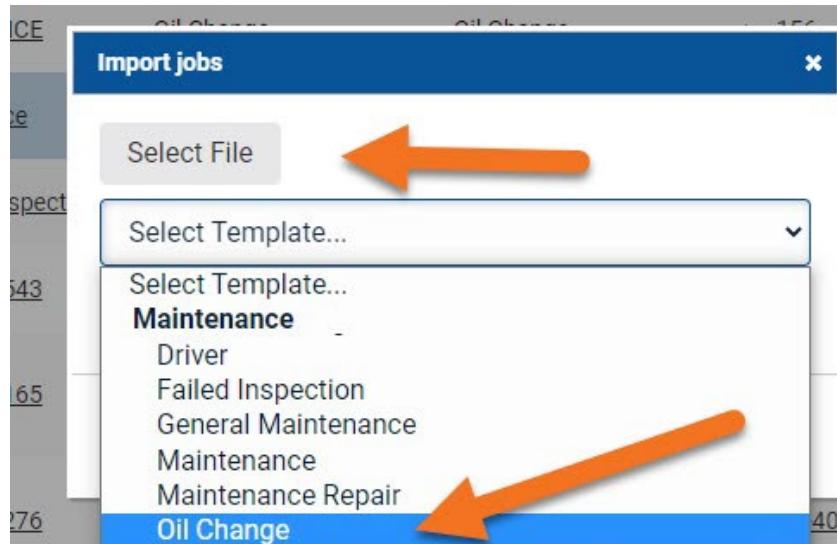
2. Download the template by clicking Download File Template.



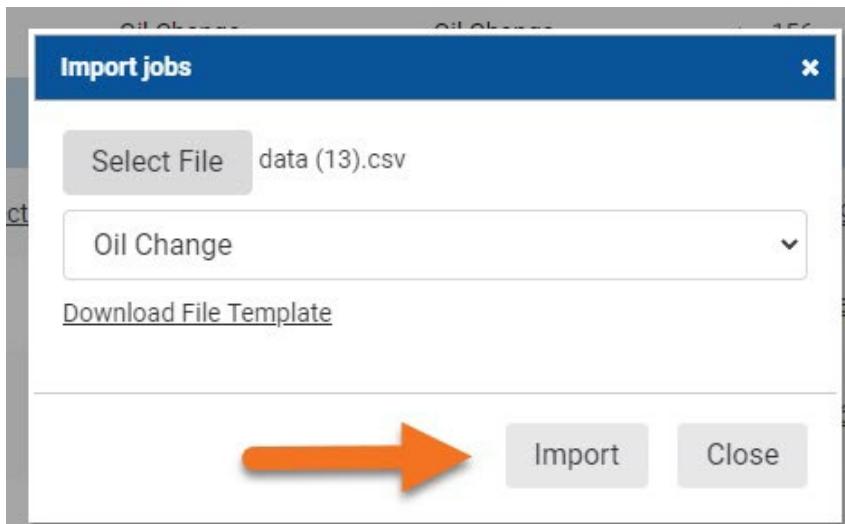
3. Add the details of your maintenance job tickets to the spreadsheet. Save your file as a .csv to your computer.

A1	B	C	D	E	F	G
1	Name	Description	Notes	Target	Assignee	Due Date
2						
3						
4						
5						
6						
7						

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

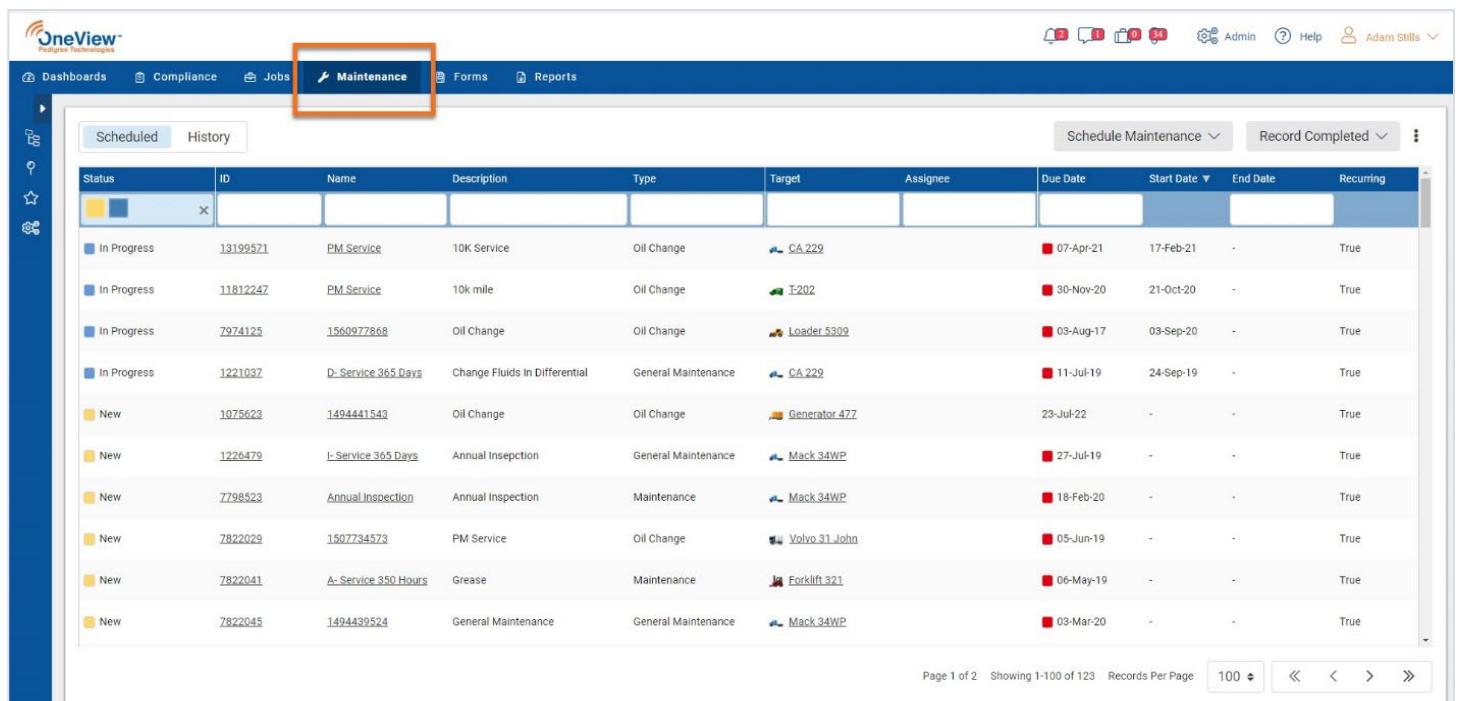


5. After you've selected your file, chosen the template, now choose Import to load the new jobs.



## Maintenance List/Filter

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



Status	ID	Name	Description	Type	Target	Assignee	Due Date	Start Date	End Date	Recurring
In Progress	13199571	PM Service	10K Service	Oil Change	CA229		07-Apr-21	17-Feb-21	-	True
In Progress	11812247	PM Service	10k mile	Oil Change	I202		30-Nov-20	21-Oct-20	-	True
In Progress	7974125	1560977868	Oil Change	Oil Change	Loader 5309		03-Aug-17	03-Sep-20	-	True
In Progress	1221037	D-Service 365 Days	Change Fluids In Differential	General Maintenance	CA 229		11-Jul-19	24-Sep-19	-	True
New	1075623	1494441543	Oil Change	Oil Change	Generator 472		23-Jul-22	-	-	True
New	1226479	I- Service 365 Days	Annual Insepction	General Maintenance	Mack 34WP		27-Jul-19	-	-	True
New	7798523	Annual Inspection	Annual Inspection	Maintenance	Mack 34WP		18-Feb-20	-	-	True
New	7822029	1507734573	PM Service	Oil Change	Volvo 31 John		05-Jun-19	-	-	True
New	7822041	A-Service 350 Hours	Grease	Maintenance	Forklift 321		06-May-19	-	-	True
New	7822045	1494439524	General Maintenance	General Maintenance	Mack 34WP		03-Mar-20	-	-	True

**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

The screenshot shows the 'Maintenance' tab selected in the header. Below it, there are two tabs: 'Scheduled' (which is highlighted with an orange box) and 'History'. A table below displays maintenance records with columns for Status, ID, Name, and Description.

Status	ID	Name	Description
New	<a href="#">12149279</a>	<a href="#">1606936634 - Body/Doors</a>	Failed Inspection Repair: Body/Doors
In Progress	<a href="#">11812247</a>	<a href="#">PM Service</a>	10k mile
New	<a href="#">8990949</a>	<a href="#">1464712483</a>	Medical Card
New	<a href="#">11424715</a>	<a href="#">PM Service</a>	10K mile change

### History Maintenance Filter

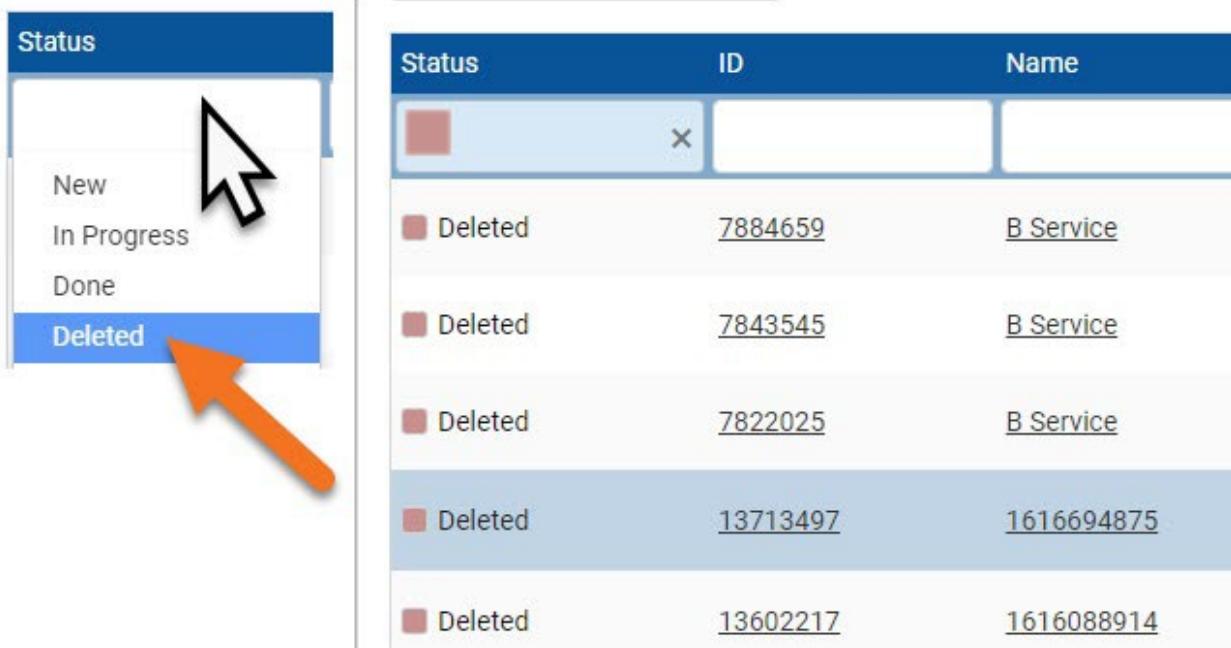
Use the History button to see all of the completed maintenances that have been marked Done.

The screenshot shows the 'Maintenance' tab selected in the header. Below it, there are two tabs: 'Scheduled' and 'History' (which is highlighted with an orange box). A table below displays maintenance records with columns for Status, ID, Name, and Description.

Status	ID	Name	Description
Done	<a href="#">318285</a>	<a href="#">B Service</a>	Oil Change
Done	<a href="#">4151893</a>	<a href="#">B-Service</a>	10K miles
Done	<a href="#">16896999</a>	<a href="#">PM Service</a>	10K Mile Service
Done	<a href="#">16988516</a>	<a href="#">1652374667</a>	Inspection Failure: [NO Inspection Failure]

## Deleted Status

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

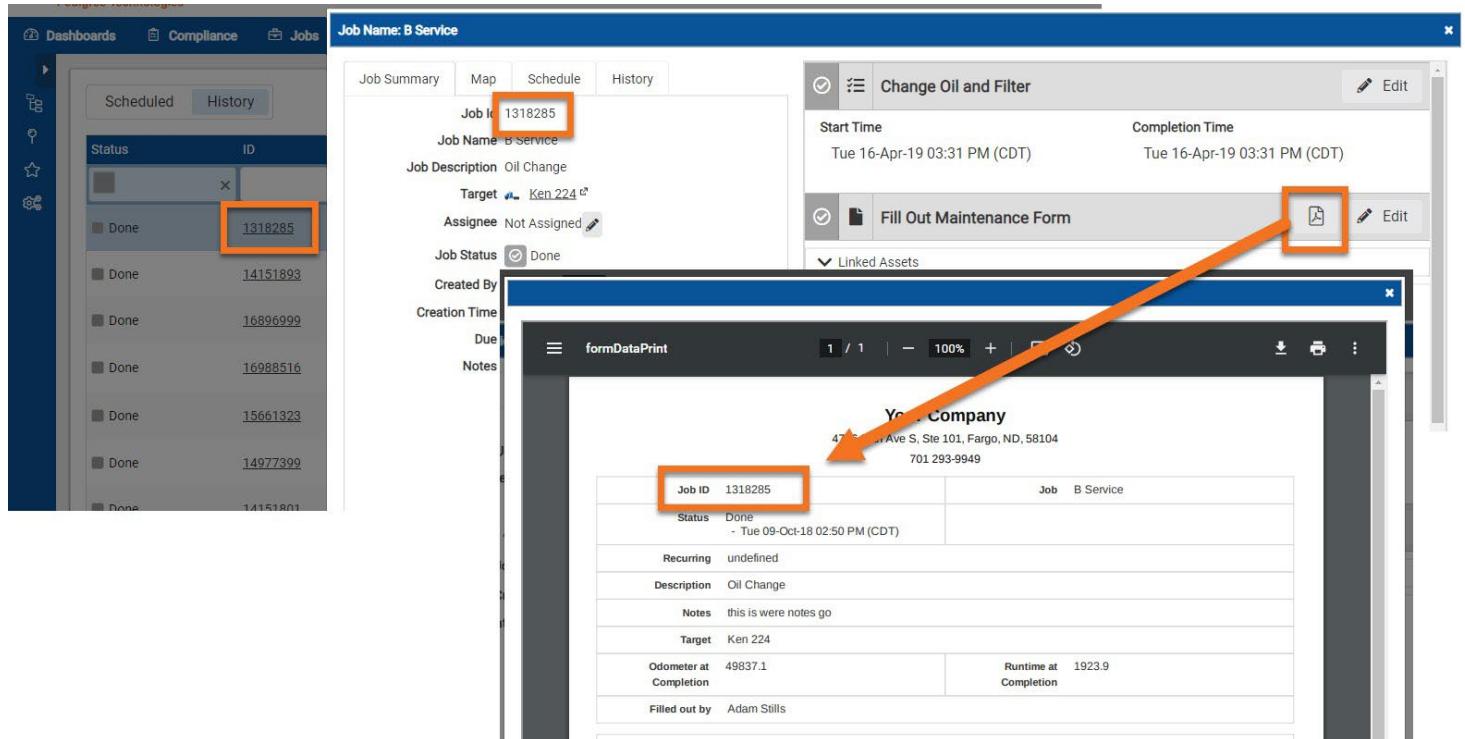


The screenshot shows the 'Status' dropdown menu on the left, with 'Deleted' selected. An orange arrow points from the 'Deleted' option in the dropdown to the 'Deleted' row in the main table on the right. The table lists five deleted jobs, each with a red 'Deleted' status indicator, a job ID, and a name.

Status	ID	Name
Deleted	<a href="#">7884659</a>	<a href="#">B Service</a>
Deleted	<a href="#">7843545</a>	<a href="#">B Service</a>
Deleted	<a href="#">7822025</a>	<a href="#">B Service</a>
Deleted	<a href="#">13713497</a>	<a href="#">1616694875</a>
Deleted	<a href="#">13602217</a>	<a href="#">1616088914</a>

## 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.



The screenshot illustrates the use of the ID filter across different parts of the application. On the left, a list of jobs is shown with the ID '1318285' highlighted by an orange box. In the center, a detailed job view for 'Job Name: B Service' shows the ID '1318285' in the 'Job ID' field, also highlighted with an orange box. A large orange arrow points from this field to a print preview window on the right, which displays the job details including the ID '1318285' again. The print preview window has its own orange box highlighting the ID field.

## 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.

Status	ID	Name	Description	Type	Target	Assignee	Due Date ▾	Start Date	End Date	Recurring
New	16622246	PM SERVICE	Oil Change	Oil Change	156		13-Jun-23	-	-	True
New	16897009	PM Service	10K Mile Service	Oil Change	156		13-Jun-23	-	-	True
New	16849071	Annual Inspection	General Maintenance	General Maintenance	CA 229		13-Jun-23	-	-	True
New	1075623	1494441543	Oil Change	Oil Change	Generator 477		25-Jun-22	-	-	True
New	17050733	1653679165	Inspection Failure: [NOTICE] ALARM: [Inspection Failure]	Failed Inspection	TR-406		28-May-22	-	-	False
New	17050200	1653664276	Inspection Failure: [NOTICE] ALARM: [Inspection Failure]	Failed Inspection	TR-406		28-May-22	-	-	False
New	17050732	1653679165	Vehicle/Trailer Inspection Failure: [NOTICE] ALARM: [Vehicle/Trailer Inspection Failure]	Failed Inspection	TR-406		27-May-22	-	-	False
New	17050199	1653664276	Vehicle/Trailer Inspection Failure: [NOTICE] ALARM: [Vehicle/Trailer Inspection Failure]	Failed Inspection	TR-406		27-May-22	-	-	False

## 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.

Status	ID	Name	Description	Type	Target	Assignee	Due Date ▾	Start Date	End Date	Recurring
New	16622246	PM SERVICE	Oil Change	Oil Change	156		13-Jun-23	-	-	True
New	16897009	PM Service	10K Mile Service	Oil Change	156		13-Jun-23	-	-	True
New	16849071	Annual Inspection	General Maintenance	General Maintenance	CA 229		13-Jun-23	-	-	True
New	1075623	1494441543	Oil Change	Oil Change	Generator 477		25-Jun-22	-	-	True
New	17050733	1653679165	Inspection Failure: [NOTICE] ALARM: [Inspection Failure]	Failed Inspection	TR-406		28-May-22	-	-	False
New	17050200	1653664276	Inspection Failure: [NOTICE] ALARM: [Inspection Failure]	Failed Inspection	TR-406		28-May-22	-	-	False
New	17050732	1653679165	Vehicle/Trailer Inspection Failure: [NOTICE] ALARM: [Vehicle/Trailer Inspection Failure]	Failed Inspection	TR-406		27-May-22	-	-	False
New	17050199	1653664276	Vehicle/Trailer Inspection Failure: [NOTICE] ALARM: [Vehicle/Trailer Inspection Failure]	Failed Inspection	TR-406		27-May-22	-	-	False

## 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.

Status	ID	Name	Description	Type	Type	Due Date ▾	Start Date	End Date	Recurring
New	16622246	PM SERVICE	Oil Change	Oil Change	No Template	13-Jun-23	-	-	True
New	16897009	PM Service	10K Mile Service	Oil Change	CEC Annual Glycol He	13-Jun-23	-	-	True
New	16849071	Annual Inspection	General Maintenance	General Maintenance	CEC Annual Rig Hea	13-Jun-23	-	-	True
New	1075623	1494441543	Oil Change	Oil Change	Driver	25-Jun-22	-	-	True
New	17050733	1653679165	Inspection Failure: [NOTICE] ALARM: [Inspection Failure]	Failed Inspection	Maintenance Repair	28-May-22	-	-	False
New	17050200	1653664276	Inspection Failure: [NOTICE] ALARM: [Inspection Failure]	Failed Inspection	Oil Change	28-May-22	-	-	False
New	17050732	1653679165	Vehicle/Trailer Inspection Failure: [NOTICE] ALARM: [Vehicle/Trailer Inspection Failure]	Failed Inspection	TR-406	27-May-22	-	-	False
New	17050199	1653664276	Vehicle/Trailer Inspection Failure: [NOTICE] ALARM: [Vehicle/Trailer Inspection Failure]	Failed Inspection	TR-406	27-May-22	-	-	False

## *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.

Target	Assignee	Due Date ▾
<input type="text"/> Type to Search... No Target <a href="#">Open Tree to Select</a>		13-Jun-23
<a href="#">CA 229</a>		13-Jun-23
<a href="#">Generator 477</a>		25-Jun-22
<a href="#">TR-406</a>		28-May-22
<a href="#">TR-406</a>		28-May-22
		27-May-22

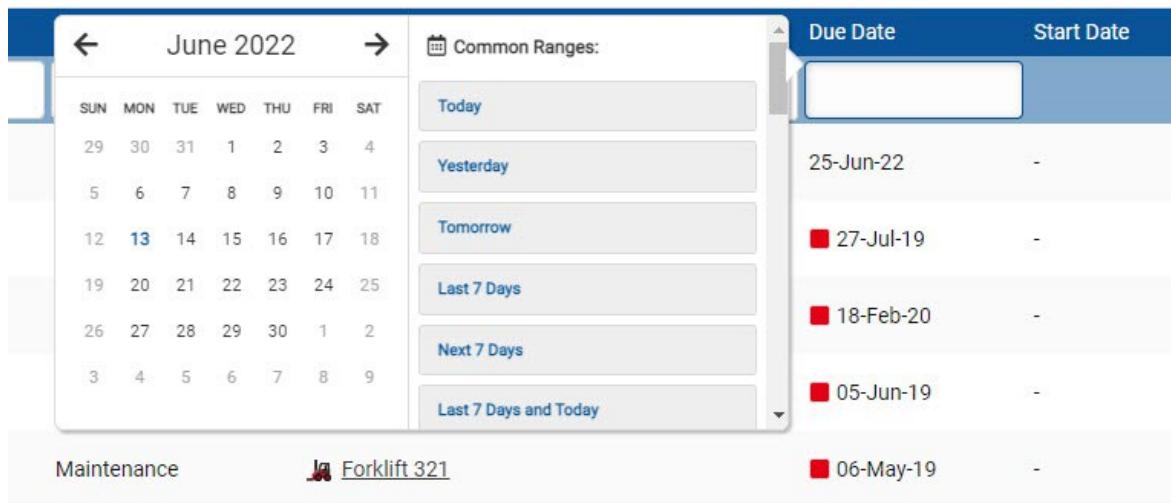
## *Assignee Filter*

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.

Assignee ▼	Due Date
<a href="#">operator 477</a>	25-Jun-22
<a href="#">ck 34WP</a>	27-Jul-19
<a href="#">ck 34WP</a>	18-Feb-20
<a href="#">vo 31</a>	05-Jun-19

## 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.



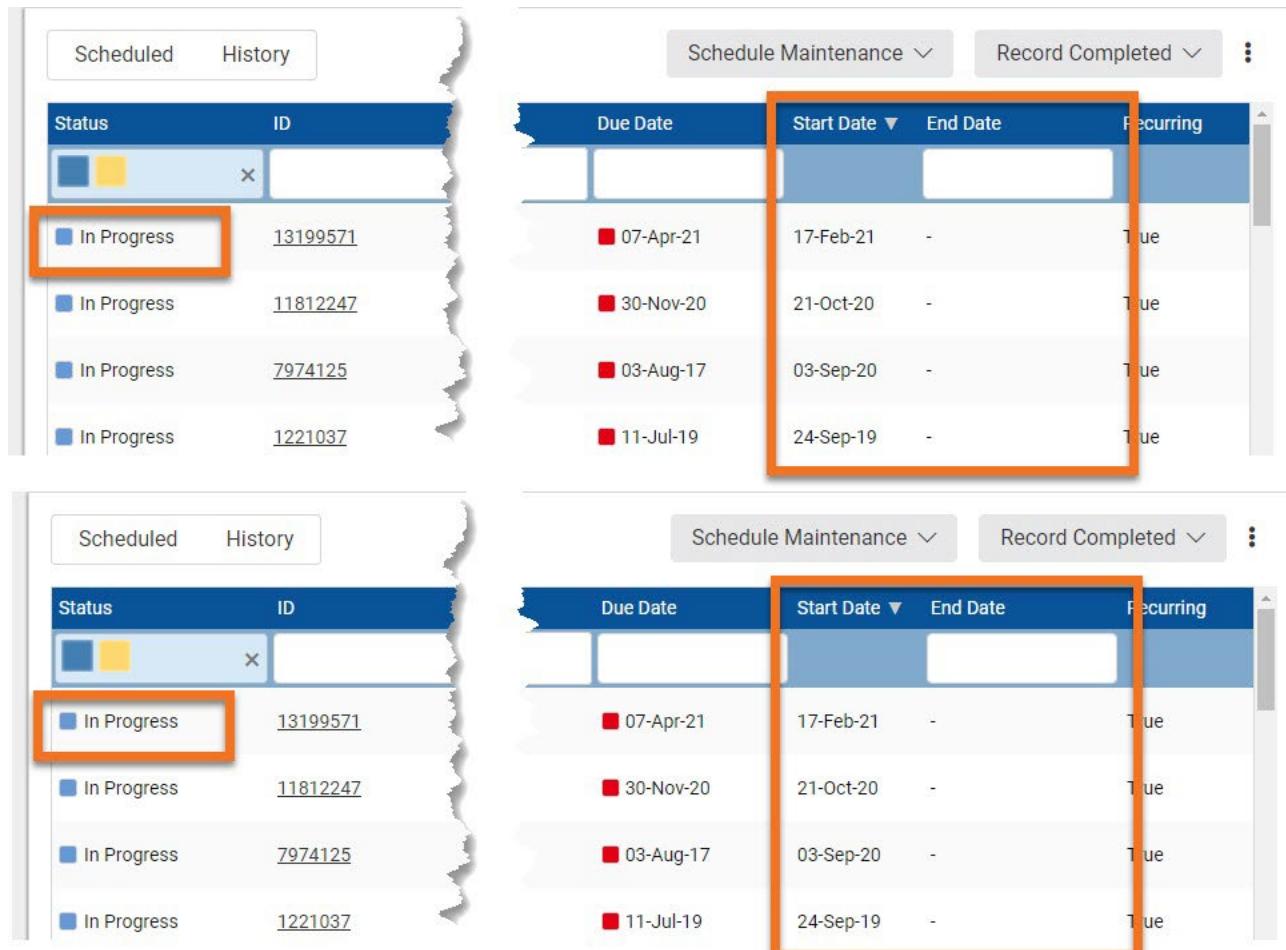
Due Date	Start Date
25-Jun-22	-
27-Jul-19	-
18-Feb-20	-
05-Jun-19	-
06-May-19	-

Maintenance

Forklift 321

## Start Date/End Date

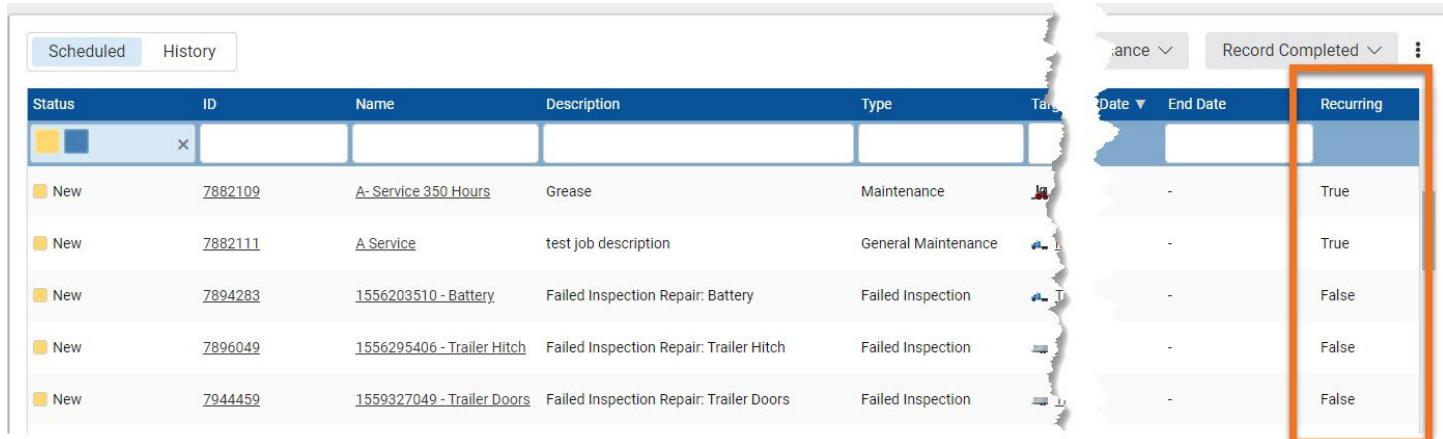
On completed or in progress maintenances, the Start Date and End Dates will show you when the job was completed or when the job was started and subsequently completed.



Due Date	Start Date ▼	End Date	Recurring
07-Apr-21	17-Feb-21	-	True
30-Nov-20	21-Oct-20	-	True
03-Aug-17	03-Sep-20	-	True
11-Jul-19	24-Sep-19	-	True

## Recurring Filter

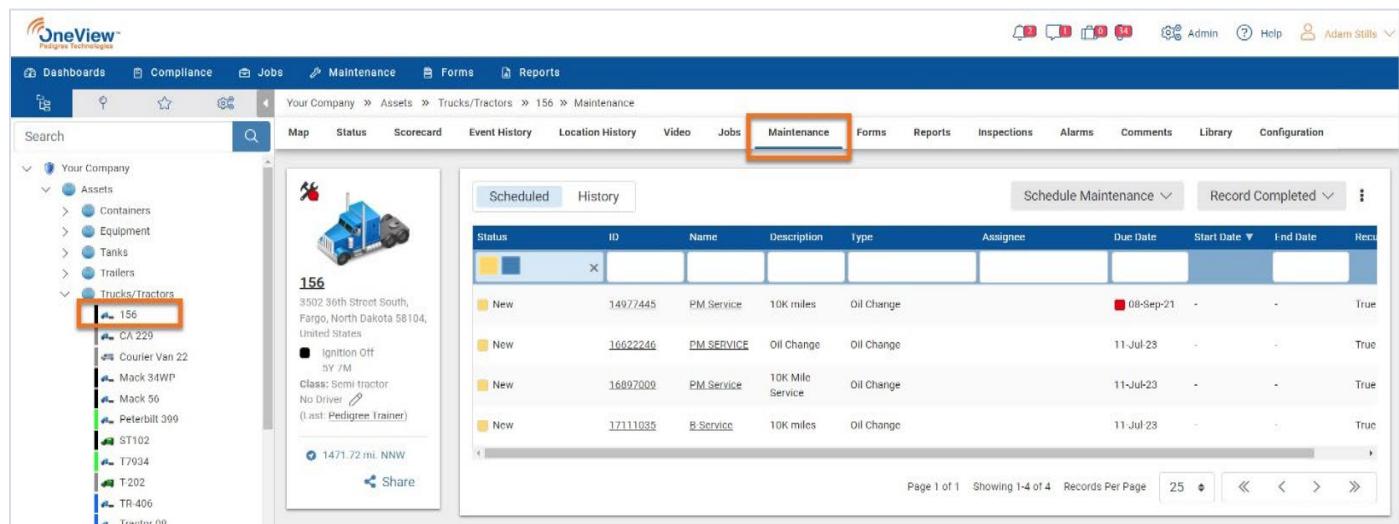
In the recurring column, True means that the maintenance is recurring and False means it is a one-time job.



Status	ID	Name	Description	Type	Target Date	Date ▾	End Date	Recurring
New	<a href="#">7882109</a>	<a href="#">A- Service 350 Hours</a>	Grease	Maintenance	-	-	-	True
New	<a href="#">7882111</a>	<a href="#">A Service</a>	test job description	General Maintenance	-	-	-	True
New	<a href="#">7894283</a>	<a href="#">1556203510 - Battery</a>	Failed Inspection Repair: Battery	Failed Inspection	-	-	-	False
New	<a href="#">7896049</a>	<a href="#">1556295406 - Trailer Hitch</a>	Failed Inspection Repair: Trailer Hitch	Failed Inspection	-	-	-	False
New	<a href="#">7944459</a>	<a href="#">1559327049 - Trailer Doors</a>	Failed Inspection Repair: Trailer Doors	Failed Inspection	-	-	-	False

## Maintenance tab under assets

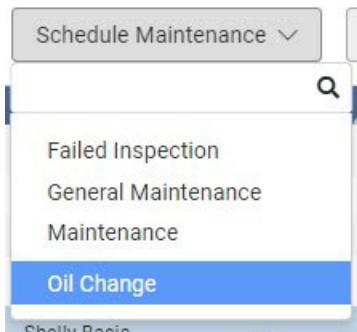
Each of the assets has a separate Maintenance Tab under it. This tab will display maintenances that were assigned to that asset. When the Maintenance Tab is clicked, it will default to the Scheduled maintenances. If the user would like to see past maintenances they will need to click on History. If the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



Status	ID	Name	Description	Type	Assignee	Due Date	Start Date ▾	End Date	Recurring
New	<a href="#">14977445</a>	<a href="#">PM Service</a>	10K miles	Oil Change	-	08-Sep-21	-	-	True
New	<a href="#">16622246</a>	<a href="#">PM SERVICE</a>	Oil Change	Oil Change	-	11-Jul-23	-	-	True
New	<a href="#">16897009</a>	<a href="#">PM Service</a>	10K Mile Service	Oil Change	-	11-Jul-23	-	-	True
New	<a href="#">17111035</a>	<a href="#">B_Service</a>	10K miles	Oil Change	-	11-Jul-23	-	-	True

## Maintenance Templates

Use the Scheduled Maintenance dropdown to choose a template



### **Oil Change**

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

### **General Maintenance**

The General Maintenance template includes triggers for 2nd and 3rd 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.

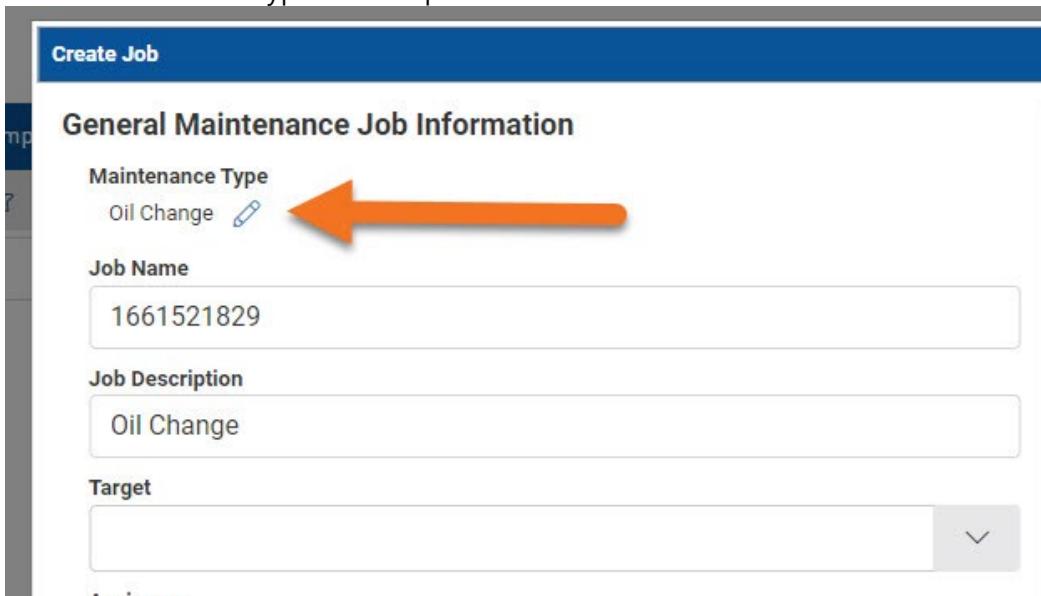
### **Maintenance**

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.

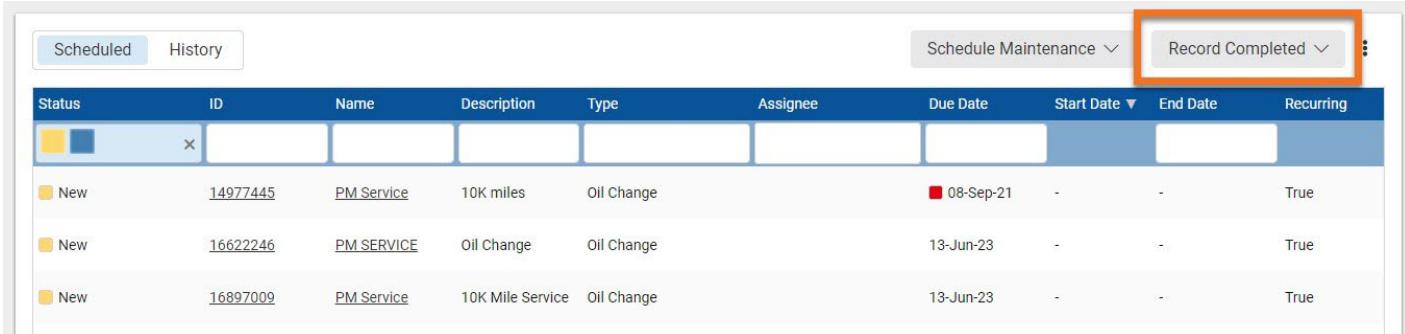
The template can be changed while setting up the ticket if needed. Click the edit pencil next the template name under Maintenance Type at the top.



The screenshot shows a 'Create Job' form titled 'General Maintenance Job Information'. The 'Maintenance Type' field is populated with 'Oil Change' and features an edit pencil icon. An orange arrow points to this field. Below it, the 'Job Name' field contains '1661521829'. The 'Job Description' field contains 'Oil Change'. The 'Target' field is empty. At the bottom of the form, there is a section labeled 'Accessories'.

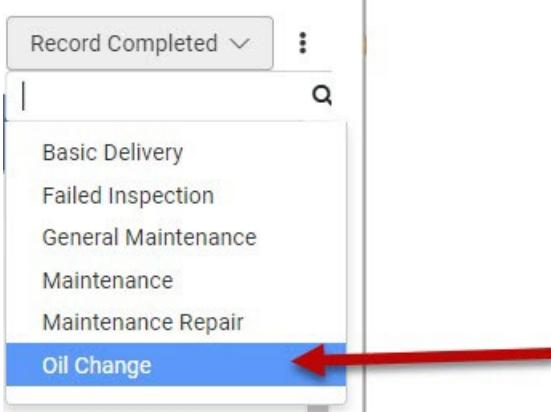
## Add a Maintenance Record after it was already completed

To add maintenance records after they've already been completed, such as an oil change that was done but didn't yet have a maintenance ticket waiting in OneView, use the Record Completed button.



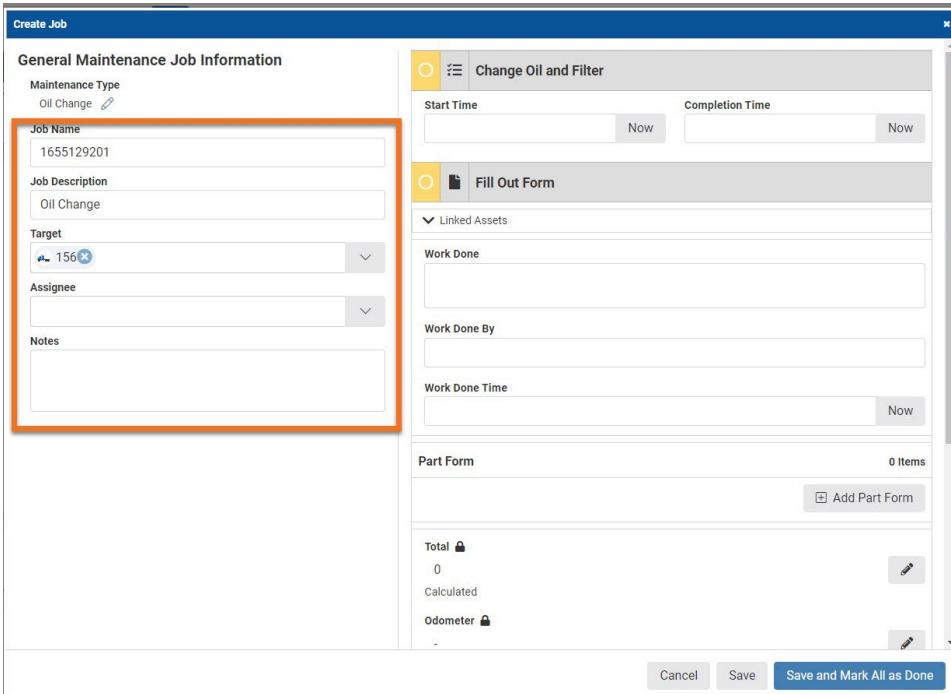
Status	ID	Name	Description	Type	Assignee	Due Date	Start Date	End Date	Recurring
New	<a href="#">14977445</a>	<a href="#">PM Service</a>	10K miles	Oil Change		08-Sep-21	-	-	True
New	<a href="#">16622246</a>	<a href="#">PM SERVICE</a>	Oil Change	Oil Change		13-Jun-23	-	-	True
New	<a href="#">16897009</a>	<a href="#">PM Service</a>	10K Mile Service	Oil Change		13-Jun-23	-	-	True

Choose the type or template from the dropdown.



- Record Completed ▾
- ⋮
- Basic Delivery
- Failed Inspection
- General Maintenance
- Maintenance
- Maintenance Repair
- Oil Change**

On the left side of the ticket, you can add the job name, description, target, assignee and notes.



On the right side of the ticket (above) fill out the fields the same way as a pre-existing ticket (see steps in "How to Complete a Maintenance" near the beginning of this document).

## 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.

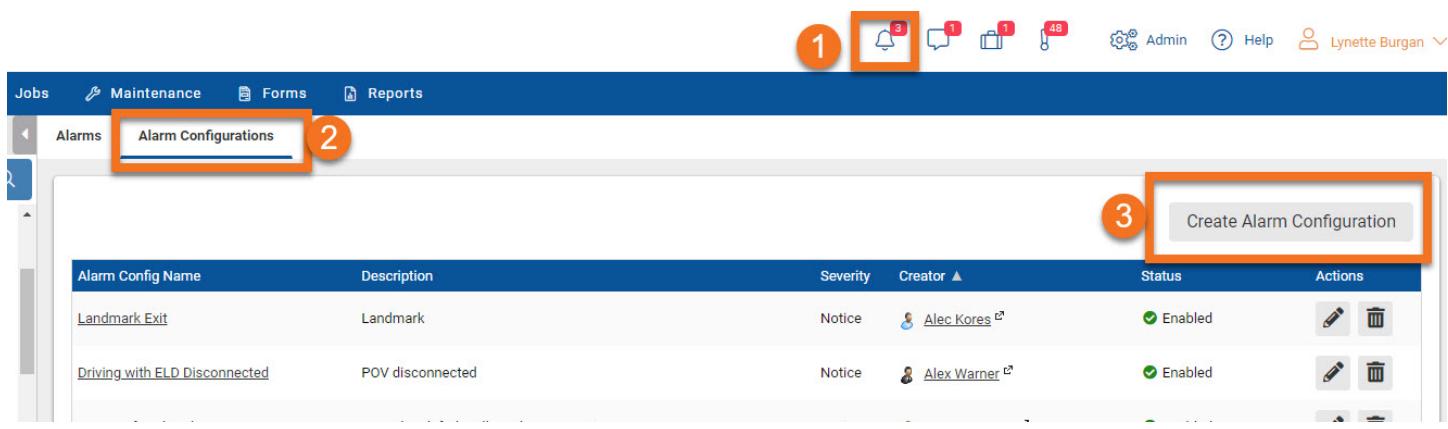
Enter the last known odometer and click the Date/Time field to enter the date and time of that last known odometer/runtime.

## Use Alarms to Create Maintenance Jobs

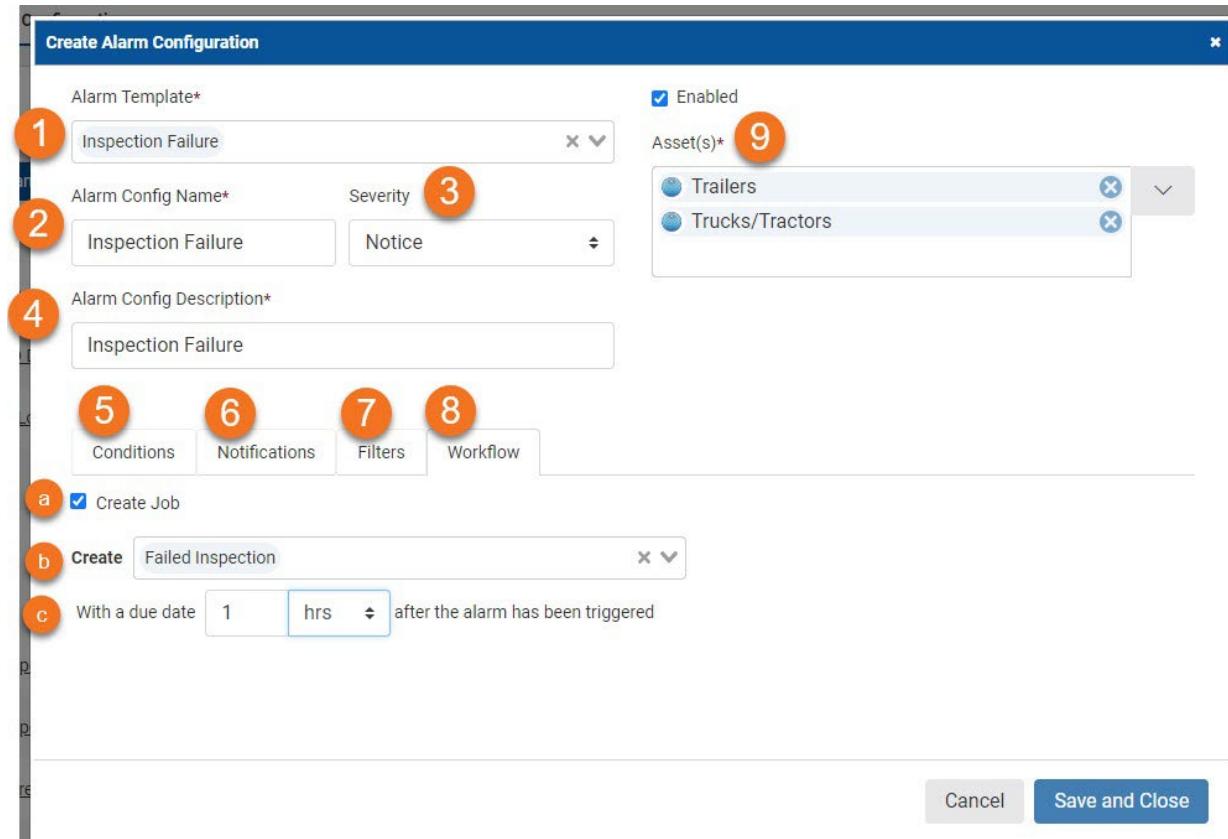
You can use the create job setting in the alarm configurations to have a maintenance ticket created automatically by OneView. A common use of this is for failed inspections or offline assets, but there are other alarms that may be useful to set and create maintenance jobs.

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 the Bell icon (top right)
2. Click Alarm Configuration (center top of content area)
3. Click Configure a New Alarm



The screenshot shows the OneView Maintenance application interface. At the top, there's a navigation bar with tabs for 'Jobs', 'Maintenance', 'Forms', and 'Reports'. On the far right of the top bar, there are several icons with red notification counts (3, 1, 1, 48) and user information ('Admin', 'Help', 'Lynette Burgen'). Below the top bar, there's a secondary navigation bar with 'Alarms' and 'Alarm Configurations' buttons. The 'Alarm Configurations' button is highlighted with a red box and labeled '2'. In the main content area, there's a table listing two existing alarm configurations: 'Landmark Exit' and 'Driving with ELD Disconnected'. To the right of the table is a large orange button labeled 'Create Alarm Configuration' with a red box around it and labeled '3'. The entire interface has a clean, modern design with a blue header and white background.



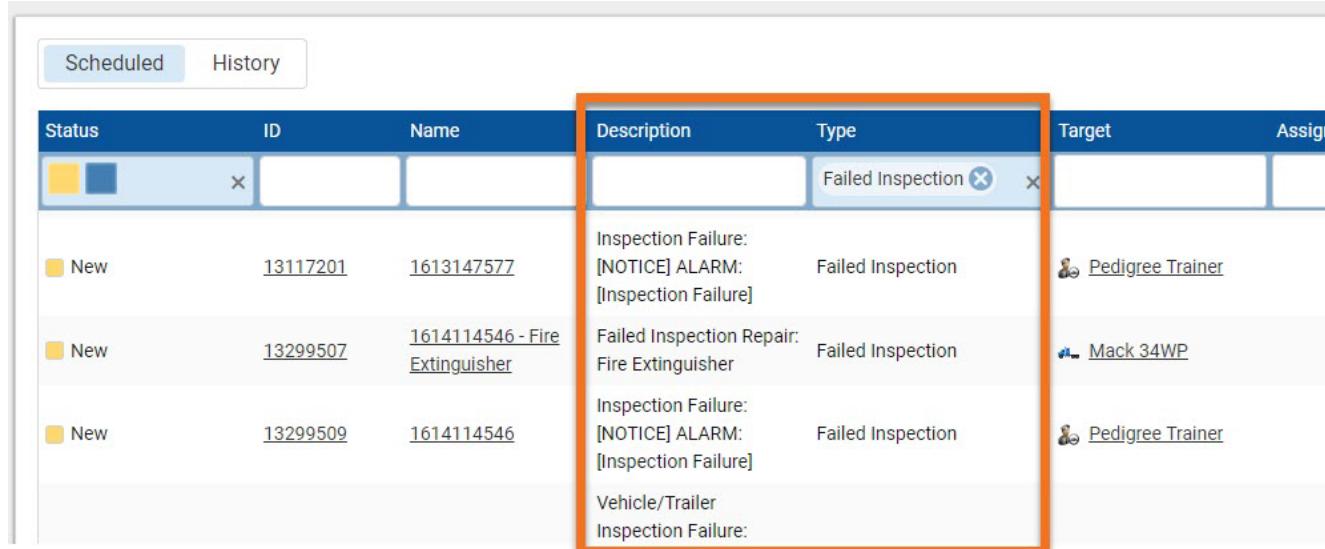
The screenshot shows the 'Create Alarm Configuration' dialog box. At the top left, it says 'Create Alarm Configuration'. The form is divided into several sections:

- Alarm Template\***: A dropdown menu currently set to 'Inspection Failure' (labeled 1).
- Asset(s)\***: A dropdown menu containing 'Trailers' and 'Trucks/Tractors' (labeled 9).
- Alarm Config Name\***: An input field containing 'Inspection Failure' (labeled 2).
- Severity**: A dropdown menu currently set to 'Notice' (labeled 3).
- Alarm Config Description\***: An input field containing 'Inspection Failure' (labeled 4).
- Workflow**: A tabbed section with four tabs: 'Conditions' (labeled 5), 'Notifications' (labeled 6), 'Filters' (labeled 7), and 'Workflow' (labeled 8). The 'Workflow' tab is currently selected.
- Create**: A dropdown menu currently set to 'Failed Inspection' (labeled b).
- With a due date**: An input field with a dropdown menu showing '1 hrs' (labeled c).
- Buttons**: At the bottom right are 'Cancel' and 'Save and Close' buttons.

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 Worflow
  - 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.



Status	ID	Name	Description	Type	Target	Assign
New	<a href="#">13117201</a>	<a href="#">1613147577</a>		Failed Inspection		
New	<a href="#">13299507</a>	<a href="#">1614114546 - Fire Extinguisher</a>	Inspection Failure: [NOTICE] ALARM: [Inspection Failure]	Failed Inspection	 <a href="#">Pedigree Trainer</a>	
New	<a href="#">13299509</a>	<a href="#">1614114546</a>	Failed Inspection Repair: Fire Extinguisher	Failed Inspection	 <a href="#">Mack 34WP</a>	
			Inspection Failure: [NOTICE] ALARM: [Inspection Failure]	Failed Inspection	 <a href="#">Pedigree Trainer</a>	
			Vehicle/Trailer Inspection Failure:			

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.)

Job Name: 1614114546

Job Summary Map Schedule History

Job Id 13299511  
 Job Name 1614114546  
 Job Description Vehicle/Trailer Inspection Failure: [NOTICE]  
     ALARM: [Vehicle/Trailer Inspection Failure]  
 Recipient Mack 34WP  
 Assignee Not Assigned  
 Job Status New  
 Created By Vehicle/Trailer Inspection Failure  
 Creation Time Tue 23-Feb-21 03:09 PM (CST)  
 Due Tue 23-Feb-21 09:07 PM (CST)  
 Notes Mack 34WP has a [NOTICE] ALARM:  
     [Vehicle/Trailer Inspection Failure] NOTICE level  
     alarm at Tuesday 23 Feb 2021 03:07 PM CST  
     Fire Extinguisher : missing

[Edit Job](#) [Clone Job](#) [Delete Job](#)

**Failed Inspection Repair**

Start Time Now Completion Time Now

[Fill Out Maintenance Form](#) [Mark as Done](#)

Linked Assets

Work Done

Work Done By

Work Done Time Now

Part Form 0 Items [Add Part Form](#)

Total 0 [Edit](#)

[Save](#) [Save & Mark All as Done](#)