Tutorial - Questions for Preventive Maintenance
Exercise 1: Create a PM

1. Go to Financials > Contracts
2. Create a new contract for any coverage type (check the contract creation exercise to follow the steps)
3. Go to the contract line
4. Go to 'PM' sub tab
5. Hit new
6. Select schedule type as 'Schedules are built on a recurring basis, based on length of coverage term' and schedule rule as 'Monthly'
7. Go in to the PM sequence line and notice that the PM schedule had got created correctly
8. Copy the contract ID and go to 'Contract Manager' screen
9. Select 'Contract PM Request Generation'
10. Specify Contract ID and Contract Version > select Schedule End Date as Today > hit Begin
11. Check for the run log completion
12. Go back to the Contract > Contract line > PM sub tab and check the PM schedule
13. See a request ID and a task ID had got created

Exercise 2:

Create a PM to be able to generate based on task completion.

1. Go to Financials > Contracts
2. Create a new contract for any coverage type (check the contract creation exercise to follow the steps)
3. Go to the contract line
4. Go to 'PM' sub tab
5. Hit new
6. Select schedule type as 'Based on Task Completion' and schedule rule as 'Quarterly'
7. Go in to the PM sequence line and notice that the 1st PM schedule had got created correctly
8. Copy the contract ID and go to 'Contract Manager' screen
9. Select 'Contract PM Request Generation'
10. Specify Contract ID and Contract Version > select Schedule End Date as Today > hit Begin
11. Check for the run log completion
12. Go back to the Contract > Contract line > PM sub tab and check the PM schedule
13. See a request ID and a task ID had got created

14. Go to the task > complete the task. Connected Request will be also completed
15. Go back to the PM Schedule and check. New schedule line is created

Exercise 3:

Create a PM to be able be generated from meter reading.

Exercise 4:

Create a business rule that allows PM to be auto-generated when the following conditions are set true (Set the business rule 45 - CONTRACT_PM).

- The contract type you select = POLY TEST
- The response code you select = 2 DAY

And auto-generated PM should contain following information,

- Schedule Rule = Monthly
- Schedule Type = Task based