IRIS 10 — Equipment Maintenance

User manual

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Maintenance entries

Overview

The Maintenance Entry screen in Equipment Management holds maintenance and repair work that waits to be posted. A Maintenance Entry is a record of maintenance or repair work on a piece of equipment. Posting moves the entries into equipment maintenance history, records their readings, and updates the PM schedule. See Equipment maintenance history and Reading updates.

On this page you can:

- Record maintenance or repair work on a piece of equipment as a Maintenance Entry.
- Identify which fields are required when you select a Maintenance Policy.
- Use the grid filter to control which entries are posted.
- Post Maintenance Entries and read the messages and notifications that follow.

For general grid use, see Data grid overview and basics.

Before you begin

- Sign in to IRIS10.
- Make sure you have access to the Maintenance Entry screen in Equipment Management.
- To post entries, you need access level 4 on the Maintenance Entry screen. See Security Administration: access levels by user.
- If entries should advance PM schedules, set up preventive maintenance policies and assign them to equipment. See Equipment tools: depreciation, policies and parts.

Procedure

Add a Maintenance Entry

1. Open the Maintenance Entry screen in Equipment Management.

   The Maintenance Entry grid opens, sorted by Equipment.
2. Use the grid's Add tool to open the Maintenance Entry editor (inline or pop-out).

   The Maintenance Entry editor opens with the **Maintenance Entry Info** section.
3. Select the equipment in the **Equipment** dropdown.

   Equipment is required. If you leave it empty, IRIS does not save the entry.
4. If the work is preventive maintenance, select the policy in the **Maintenance Policy** dropdown. Leave it empty for a repair.

   The **Maintenance Method** dropdown is pre-filled with the policy's PM method. An entry with no policy counts as a repair and needs no date or reading.

5. Enter the **Maintenance Date**.

   If a policy is selected and the date is empty, IRIS shows "Maintenance Date is required when a preventive maintenance policy is selected."
6. Enter **Last Reading Hours** or **Last Reading Miles**. The reading that matches the policy's PM method is required.

   If the policy is measured in hours and **Last Reading Hours** is empty, IRIS shows "Reading Hours is required. The selected preventive maintenance policy is measured in hours." The miles version reads "Reading Miles is required. The selected preventive maintenance policy is measured in miles." The rule follows the policy's method, even if you changed the **Maintenance Method** field.
7. Optionally, select an **Employee**.
8. Optionally, select a **Vendor**.
9. Optionally, select a **Repair Type**.
10. Optionally, enter a **Service Description** of up to 256 characters.

    Leading and trailing spaces are removed when the entry is saved.
11. Optionally, fill in any of the user-defined fields, up to 100 characters each. See User defined fields.

    Leading and trailing spaces are removed when the entry is saved.
12. Save the entry as described in Grid viewing and editing.

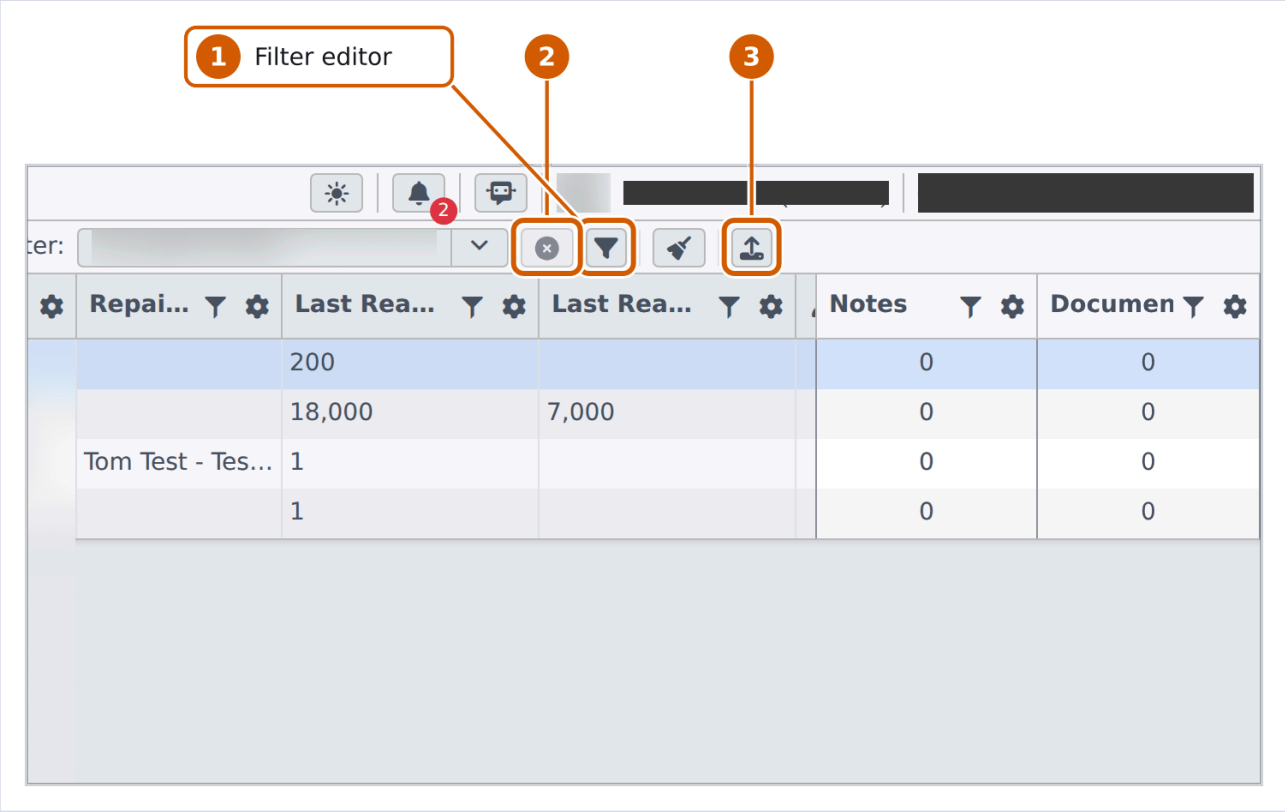
    The entry appears in the Maintenance Entry grid and waits there until it is posted.

Post Maintenance Entries

1. On the Maintenance Entry screen, click **Filter editor** and filter the grid to only the entries you want to post. See Grid filters.

   The grid shows only matching entries. The post covers every entry that matches the current filter, not just the rows you selected. Filtered-out entries are not posted.

   > **Note:** To remove a filter, click **Clear filter**.



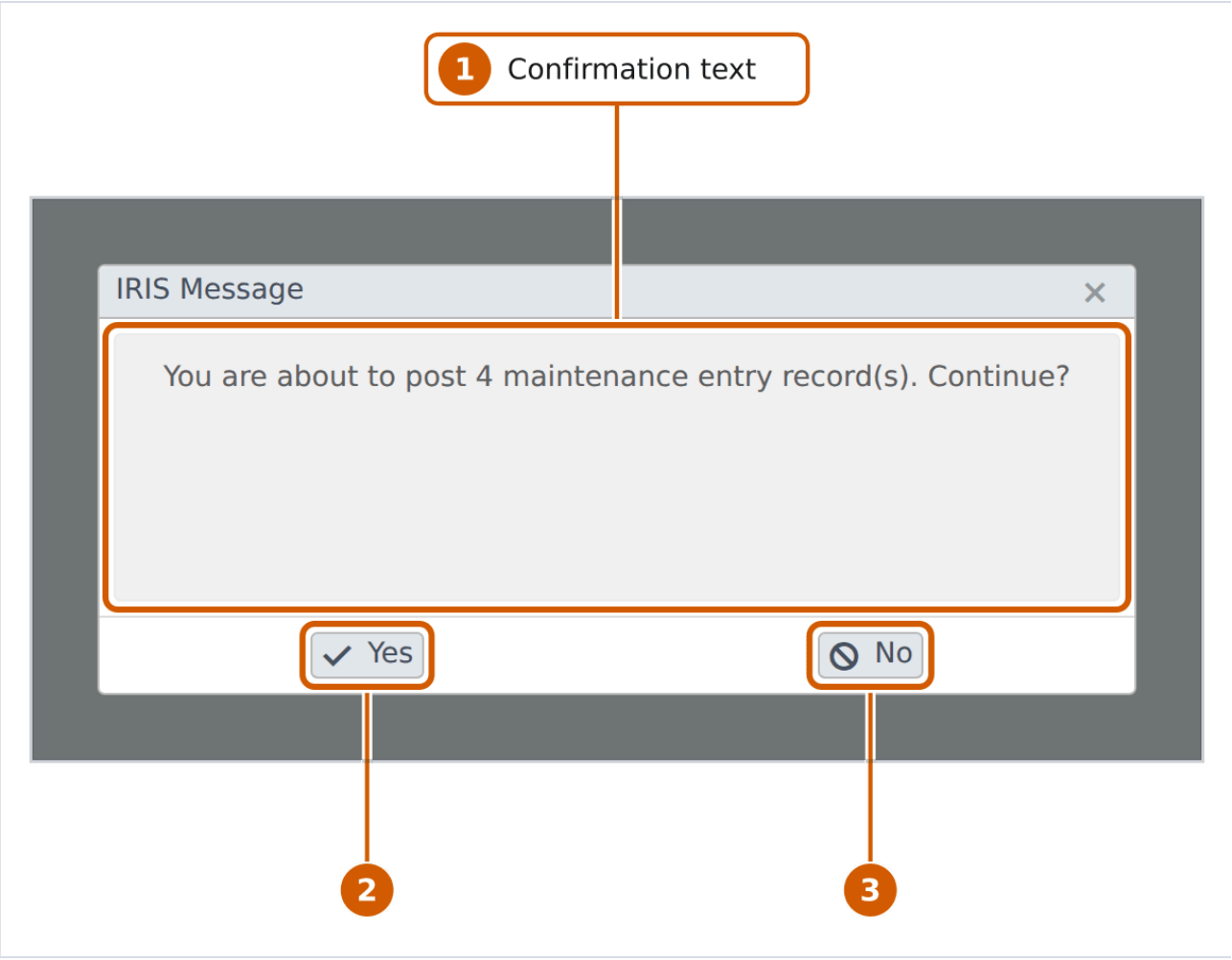
The Maintenance Entry screen. Use Filter editor to choose which entries to post, then Post maintenance entry records.

1. Filter editor — Filter the grid first. The post covers every entry that matches the filter.
2. Clear filter
3. Post maintenance entry records — Requires access level 4.

2. Click **Post maintenance entry records** on the toolbar.

   An IRIS Message window opens and asks "You are about to post N maintenance entry record(s). Continue?" with **Yes** and **No**.

> **Note:** This step requires access level 4 on the Maintenance Entry screen.



The confirmation that opens when you click Post maintenance entry records. The number counts the rows loaded on the current page, not necessarily all entries that will be posted. Click No to cancel.

1. Confirmation text — The count is rows on the current page only.
2. Yes — Posts the entries.
3. No — Cancels without posting.

3. Read the confirmation. N counts the rows loaded on the current grid page, which can be fewer than the number of entries that will be posted.

> **Note:** To cancel, click **No**. The window closes and nothing is posted.

4. Click **Yes** to post.

   A loading window is shown while the post runs.

5. Read the result.

   On success, IRIS shows "EMS maintenance entry records posted successfully." and the grid reloads. Posted entries no longer appear in it. If the post returns errors, the Posting Errors window opens instead of the success message, and the grid then reloads. If validation rejects the post, IRIS shows the validation message. On a technical error, IRIS shows "Unable to post EMS maintenance entry records due to a technical error. An email has been sent to support."

6. Check your notifications for the post result. See Notifications.

   An "EMS maintenance entries posted" notification is sent to you, unless validation rejected the post.

Reference

Maintenance Entry grid columns

COLUMN	NOTES
Equipment	Default sort column. Display only in the grid.
Maintenance Date	Date the work was done.
Employee	Display only in the grid.
Policy	Preventive maintenance policy. Display only in the grid.
PM Method	Display only in the grid.
Vendor	Display only in the grid.
Repair Type	Display only in the grid.
Last Reading Hours	Meter reading in hours.
Last Reading Miles	Meter reading in miles.
User-defined fields	Ten user-defined fields.
Service Description	Up to 256 characters.
Created Date, Created By, Last Updated Date, Updated By	Record audit columns.
Notes, Documents	Attached notes and documents.

PM Method is how a policy is measured: days, hours or miles. The editor shows it as **Maintenance Method**, pre-filled from the policy.

Maintenance Entry toolbar buttons

BUTTON	TOOLTIP
Clear grid configuration	Click to clear grid configuration.
Grid configuration editor	Click to open grid configuration editor.
Clear filter	Click to clear applied grid filter.
Filter editor	Click to open grid filter editor.
Bulk delete mode	Click to enter bulk delete mode.
Post maintenance entry records	Click to post maintenance entry records.

Editor fields and rules (Maintenance Entry Info)

FIELD	TYPE	RULE
Equipment	Dropdown	Always required.
Maintenance Date	Date	Required when a Maintenance Policy is selected.
Employee	Dropdown	Optional.
Maintenance Policy	Dropdown	Optional. Leave empty for a repair. Selecting one pre-fills Maintenance Method.
Maintenance Method	Dropdown	Pre-filled from the policy. If no method is sent, the policy's method is stored.
Vendor	Dropdown	Optional.
Repair Type	Dropdown	Optional.
Last Reading Hours	Number	Required when the policy's PM method is hours.
Last Reading Miles	Number	Required when the policy's PM method is miles.
Service Description	Text	Up to 256 characters. Spaces trimmed.
User-defined fields	Text	Up to 100 characters each. Spaces trimmed.

Messages when saving or editing an entry

MESSAGE	CAUSE	WHAT TO DO
Maintenance Date is required when a preventive maintenance policy is selected.	A policy is selected but no date was entered.	Enter the Maintenance Date or clear the policy.
Reading Hours is required. The selected preventive maintenance policy is measured in hours.	The policy is hours-based and Last Reading Hours is empty.	Enter Last Reading Hours.
Reading Miles is required. The selected preventive maintenance policy is measured in miles.	The policy is miles-based and Last Reading Miles is empty.	Enter Last Reading Miles.
Record has been modified by someone else since being queried from the database, refresh and try your update again.	Someone else changed the entry after you loaded it.	Refresh the grid and make your change again.
Record not found for this tenant.	The entry you are editing no longer exists (for example, it was posted or deleted).	Refresh the grid.

What posting changes

AREA	EFFECT
Equipment maintenance history (EMS History)	Each posted entry is copied into history with its equipment, date, employee, vendor, readings, repair type, policy, service description and user-defined fields. If the entry has no PM method, the history row uses the policy's method.

AREA	EFFECT
Reading history	An entry with an hours or miles reading adds a reading-history row with source "Maintenance Entry", dated with the Maintenance Date. An entry with no reading adds none.
Equipment last readings	Each equipment record's last reading date, hours and miles are refreshed from its most recent reading-history row that has hours or miles.
PM schedule	For the equipment and policy of each posted entry, Last PM, Next PM Due and last maintenance date are updated, but only where the policy is assigned to that equipment. Entries with no Maintenance Date are skipped. Hours and miles policies also need the matching reading.
PM schedule: days policy	Last PM is the Maintenance Date and Next PM Due is that date plus the policy's PM frequency.
PM schedule: hours or miles policy	Last PM is the reading (Last Reading Hours or Last Reading Miles) and Next PM Due is the reading plus the policy's PM frequency.
Several entries for one equipment and policy	The entry with the latest Maintenance Date sets the schedule.
Maintenance Entry grid	Posted entries are removed.
Cost Accounting	No Cost Accounting transactions are created.

Next PM Due is when the next preventive maintenance is due: the last PM date or reading plus the policy's PM frequency. Posting sets it.

Messages after posting

SITUATION	WHAT YOU SEE
Success	"EMS maintenance entry records posted successfully." The grid reloads.
Errors returned for records	The Posting Errors window opens instead of the success message. The grid reloads afterward.
Rejected by validation	The validation message is shown.
Technical error	"Unable to post EMS maintenance entry records due to a technical error. An email has been sent to support."

Post notifications

RESULT	NOTIFICATION TITLE	NOTIFICATION TEXT
Success	EMS maintenance entries posted	EMS maintenance entry post finished with no errors.
Partial success	EMS maintenance entry post finished with errors	… finished, but one or more records returned errors. The errors were listed on the screen when it finished.
Failure	EMS maintenance entry post failed	… did not finish. Try again or contact support.

RESULT	NOTIFICATION TITLE	NOTIFICATION TEXT
Contact with the server lost	EMS maintenance entry post result unknown	IRIS lost contact with the server before this finished. It may still have completed. Check the records before you run it again.
Rejected by validation	None	No notification is sent.

Tips and notes

Important: Posting covers every entry that matches the grid's current filter, not only the rows you selected. Filter the grid before you click **Post maintenance entry records**.

Important: The number in the confirmation counts the rows loaded on the current grid page. More entries can be posted than this number shows.

Note: Posted entries are removed from the Maintenance Entry grid and kept in equipment maintenance history. Look them up there after posting.

Note: Posting updates the PM schedule only where the entry's Maintenance Policy is assigned to that equipment. Entries with no Maintenance Date do not change the schedule.

Tip: The required reading follows the policy's PM method. Changing the **Maintenance Method** field does not change which reading is required.

Tip: If a notification says IRIS lost contact with the server, the post may still have finished. Check the grid and maintenance history before you post again.

Note: Turn post notifications on or off in notification settings under EMS > Post Maintenance Entries ("Notifications when a post you run finishes.").

Note: The main menu also has Options > Post Maintenance Entry Record(s). This page uses the toolbar button.

Note: Posting does not create Cost Accounting transactions.

Related topics

- Grid filters
- Notifications
- Equipment maintenance history
- Reading updates
- Equipment tools: depreciation, policies and parts
- Grid viewing and editing

- Data grid overview and basics
- User defined fields
- Security Administration: access levels by user

Work orders

Overview

A work order records maintenance on one piece of equipment. It holds detail lines for labor, equipment, parts and outside services. When the work is done, you post the work order to maintenance history.

This page covers how to:

- Create a work order and add detail lines to it.
- Identify the required and read-only fields and their limits.
- Post work orders so their detail lines move into equipment maintenance history, readings and PM schedules are updated, and completed work orders are closed.
- Control which work orders a post affects by using the grid filter.
- Maintain the tasks that detail lines use.

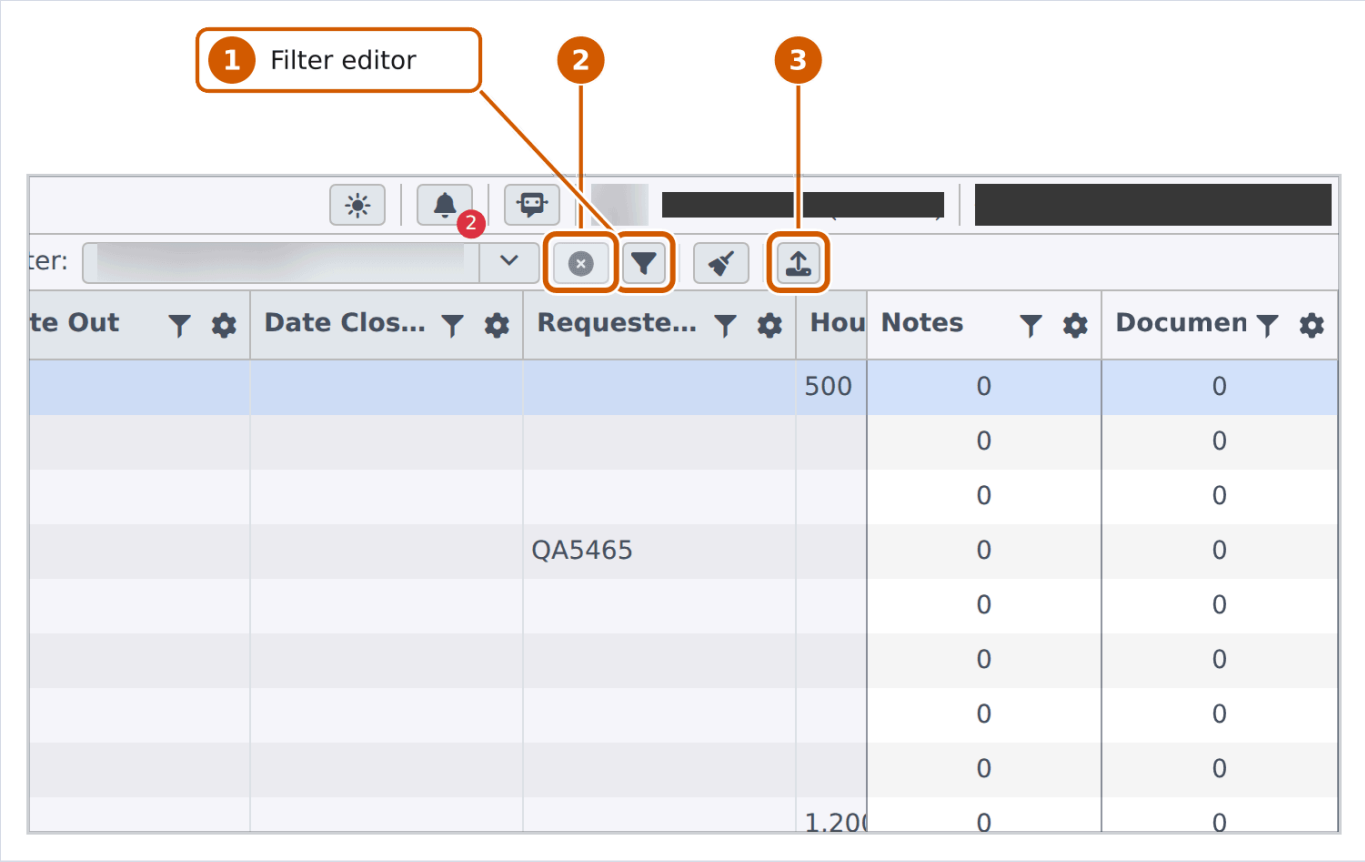
Before you begin

- Sign in to IRIS10 and open the Work Order screen. See Navigating portals and pages.
- Make sure you have access to the Work Order screen. Posting needs access level 4 on that screen. See Security Administration: access levels by user.
- Know how to add, edit and filter records in the shared data grid. See Grid viewing and editing, Grid filters and Data grid overview and basics.
- Set up tasks on the EMS Task screen. See Add a task.
- Assign PM policies to equipment if posting should advance PM schedules. See Equipment tools: depreciation, policies and parts.

Procedure

The Work Order screen

The Work Order grid shows columns such as Equipment, Status, Work Order Number, Location, Date In, Date Out and Date Closed. Each work order row has a child Work Order Detail grid. The toolbar includes **Filter editor**, **Clear filter** and **Post work order(s)**.



The Work Order screen. Use Filter editor to choose which work orders a post includes, then Post work order(s).

1. **Filter editor** – The filter sets which work orders are posted.
2. **Clear filter**
3. **Post work order(s)**

Create a work order

1. Open the Work Order screen. The work order grid shows columns such as Equipment, Status, Work Order Number, Location, Date In, Date Out and Date Closed.
2. Add a new record using the grid's add function, either inline or in the pop-out editor. The Work Order editor opens with the Work Order Info section.
3. Select the **Equipment** the work is for. Equipment is required. You cannot save the work order without it.
4. Leave **Work Order Number** as it is. It is read-only and shows the placeholder `Generated on save`. The number is assigned when you save the work order.
5. Fill in the other work order fields as needed, for example **Status**, **Location**, **Date In**, **Date Out**, **Requested By**, **Hours At Service**, **Miles At Service**, **Description** and the user-defined fields.
6. Save the work order. The message "The work order was saved. Please add the first work order detail record." appears.

7. Click **OK** on the message. The work order row expands and a new row opens in its Work Order Detail grid. This does not happen if you are using save-and-add-new, or if the new work order is on a different grid page.

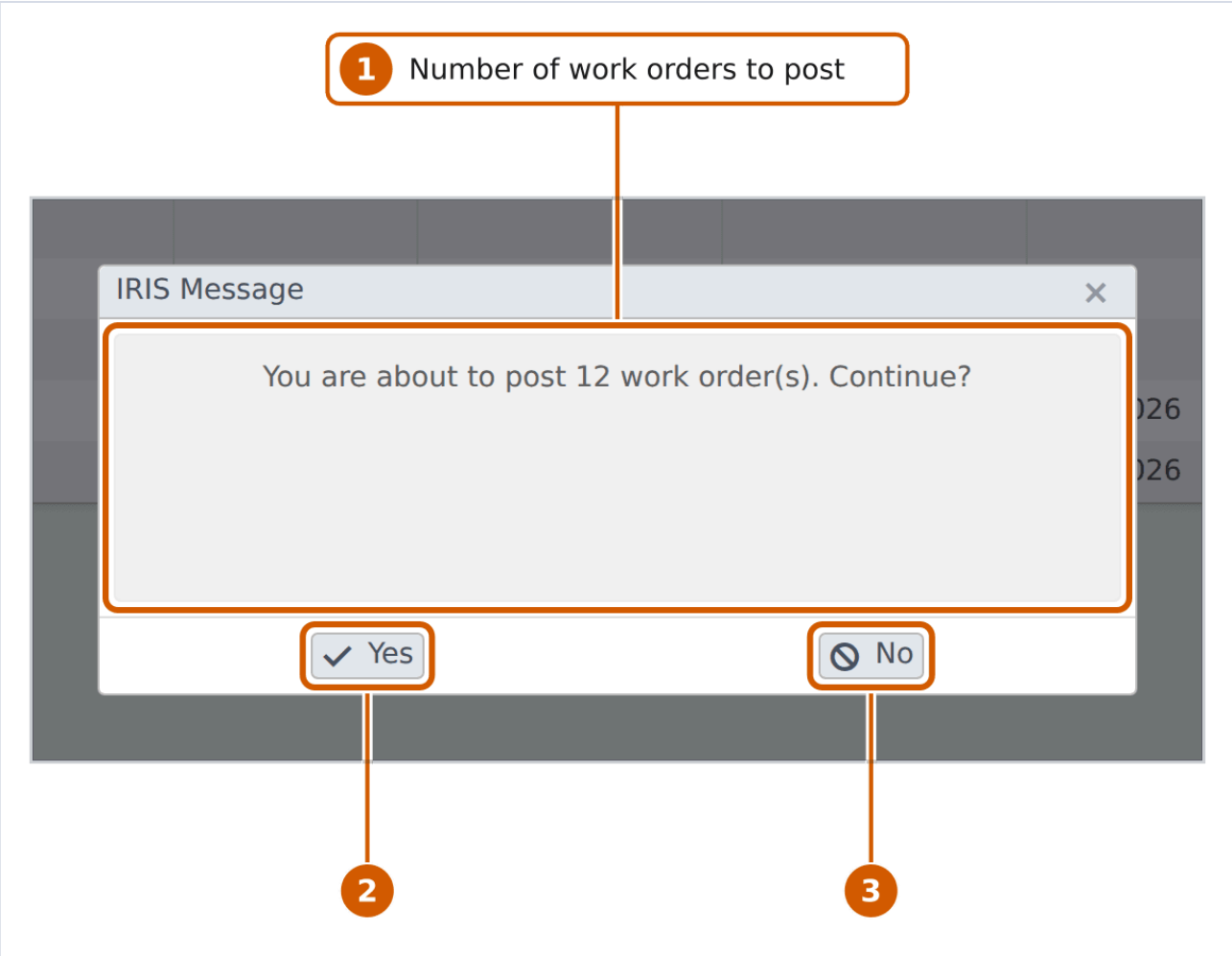
Add work order detail lines

1. Expand the work order row to show its Work Order Detail grid, then add a detail line. The Work Order Detail editor opens with the Work Order Detail Info section.
2. Select the **Task**. Task is required on every detail line.
3. Enter the **Task Date** and **Employee**.
4. Select a **Policy** if the work satisfies a PM policy. When the line is posted, a policy on the line can advance the equipment's PM schedule.
5. Enter costs and quantities as needed: **Labor Quantity** and **Labor Unit Cost**; **Equipment**, **Equipment Quantity** and **Equipment Unit Cost**; **Part**, **Part Quantity**, **Part Description**, **Part Cost** and **Part UOM**; **Outside Service Quantity**, **Description** and **Cost**. Cost fields accept values from 0 to 999999999999999.
6. Enter a **Service Description**, and set **Complete** and **PM Method** if you use them.
7. Leave **Posted To Maintenance History** cleared for a new line. Posting picks up only the lines where this checkbox is cleared, and checks it when it posts them.
8. Save the detail line.
9. Repeat for each further task, part or service on the work order.

Post work orders

1. On the Work Order screen, click **Filter editor** and filter the grid so that it shows only the work orders you want to post. The grid lists only the matching work orders. Posting uses this filter and any search filter, across all pages, not the rows you have selected.
2. Click **Post work order(s)** on the toolbar (tooltip "Click to post work order records."). An IRIS Message window asks "You are about to post N work order(s). Continue?", where N is every work order in the current filtered result.

> **Note:** Posting requires access level 4 on the Work Order screen.



The posting confirmation shows how many work orders in the current filter will be posted. Click No to cancel.

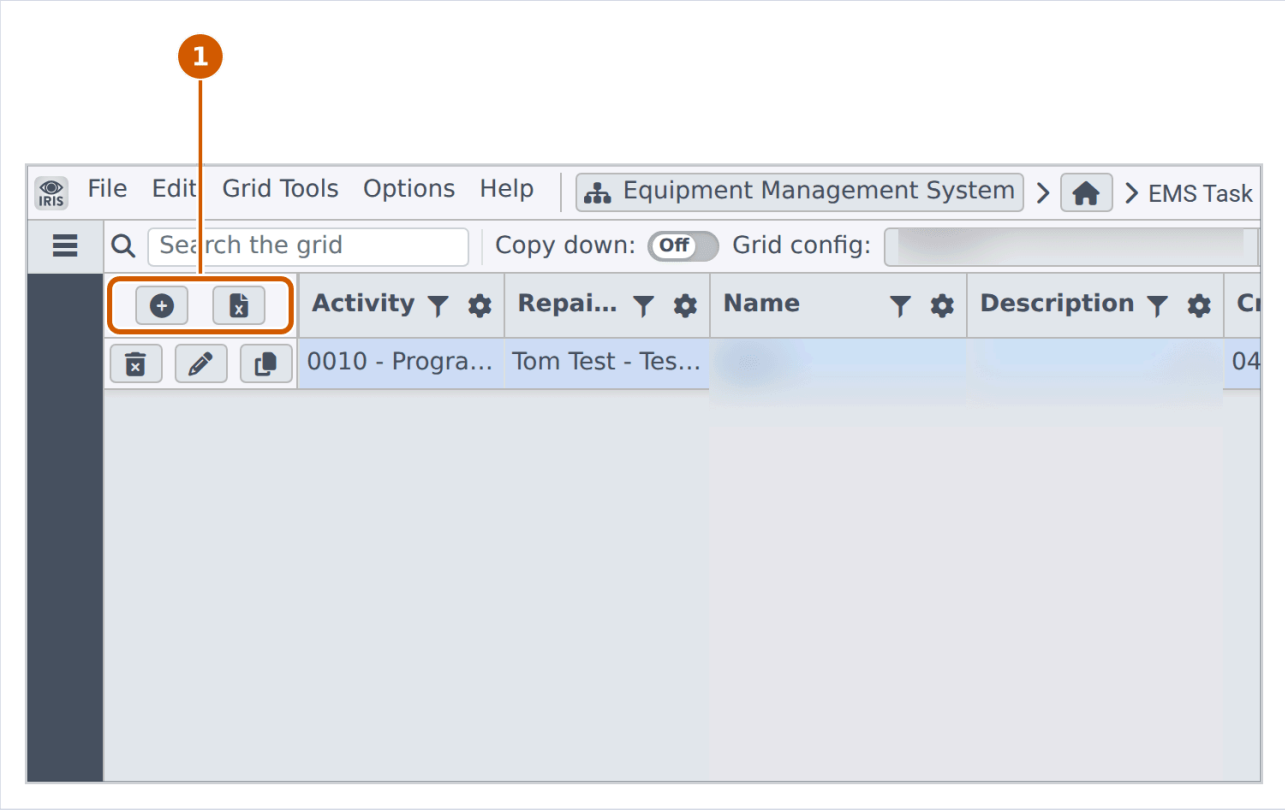
1. Number of work orders to post
2. Yes posts
3. No cancels

3. Check that the number in the message matches the number of work orders you mean to post.
4. If the number does not match, click **No**, then change the filter. **No** closes the message without posting anything.
5. If the number matches, click **Yes**. A loading indicator shows while posting runs. When it finishes, "Work orders posted successfully." appears and the work order grid reloads. If the server reports validation errors, they are shown in a message instead.
6. Review the results: posted detail lines have **Posted To Maintenance History** checked, and work orders with no unposted lines left show **Status** Closed and today's **Date Closed**. The posted work is now in the equipment's maintenance history. See Equipment maintenance history.

> **Important: Post work order(s)** posts every work order that matches the grid's current filter, across all pages, not just the rows you selected. Set the filter first and check the count in the confirmation before you click **Yes**.

Add a task

1. Open the EMS Task screen. A grid lists tasks with Activity, Repair Type, Name and Description columns.



The EMS Task screen lists the tasks used on work order detail lines.

    1. Task columns
2. Add a new record using the grid's add function. The Task editor opens with the Task Info section.
3. Select a **Repair Type**. Repair Type is required.
4. Enter a **Name** of up to 30 characters. Name is required.
5. Optionally select an **Activity** and enter a **Description** of up to 128 characters.
6. Save the task. The task is now available on work order detail lines.

Reference

Work Order toolbar

BUTTON	TOOLTIP	USE
Clear grid configuration	Click to clear grid configuration.	Reset the grid layout (disabled when nothing is saved).
Grid configuration editor	Click to open grid configuration editor.	Save or choose a grid layout.
Clear filter	Click to clear applied grid filter.	Remove the applied filter (disabled when no filter is applied).
Filter editor	Click to open grid filter editor.	Build the filter that also sets which work orders a post includes.
Bulk delete mode	Click to enter bulk delete mode.	Delete several records at once.
Post work order(s)	Click to post work order records.	Post every work order in the current filtered result (requires access level 4).

Work order fields

FIELD	NOTES
Equipment	Required.
Status	Posting sets it to Closed when no unposted detail lines remain.
Work Order Number	Read-only; generated on save (placeholder `Generated on save`); up to 20 characters.
Location, Date In, Date Out, Requested By, Description	Optional work order details. Description is copied to history on posting.
Date Closed	Set to the posting date when posting closes the work order.
Hours At Service, Miles At Service	Copied to history on posting; if either is entered, posting adds a reading-history row.
User-defined fields	Copied to each history row on posting.
Posted To Maintenance History	Read-only on the work order; set by posting.

Work Order Detail fields

FIELD	REQUIRED	LIMITS AND NOTES
Task	Yes	Chosen from the EMS Task list.
Policy	No	On posting, advances the PM schedule if that policy is assigned to the equipment.
Employee, Task Date	No	Task Date becomes the maintenance date in history.

FIELD	REQUIRED	LIMITS AND NOTES
Labor Quantity, Labor Unit Cost	No	Cost 0 to 999999999999999.
Equipment, Equipment Quantity, Equipment Unit Cost	No	Cost 0 to 999999999999999.
Part, Part Quantity, Part Description, Part Cost, Part UOM	No	Part Description up to 100 characters; cost 0 to 999999999999999.
Outside Service Quantity, Description, Cost	No	Description up to 100 characters; cost 0 to 999999999999999.
Service Description	No	Up to 256 characters; copied to history.
Complete	No	Checkbox.
PM Method	No	Copied to history only; does not drive the PM schedule.
Posted To Maintenance History	Yes (checkbox)	Editable checkbox; posting checks it. Only lines where it is cleared are posted.

What posting changes

Posting moves every unposted detail line of each work order into maintenance history, records readings, updates the equipment's last readings and PM schedule, and marks the lines posted. A work order is set to Closed only when none of its lines remain unposted.

AREA	CHANGE
Maintenance history	Each unposted detail line becomes a history row marked as posted from a work order, with the work order's hours and miles at service, the line's task date, employee, policy and PM method, the task's repair type, the work order description, the line's service description and the user-defined fields.
Reading history	One reading row per work order, with source Work Order and dated the latest task date of its unposted lines, but only if Hours At Service or Miles At Service is entered.
Equipment last readings	Last reading date, hours and miles are updated from the equipment's most recent reading-history row.
PM schedule	For each line with a policy that is assigned to that equipment: Last PM is set using the policy's PM method (days: line's task date; hours: work order's hours; miles: work order's miles), Next PM Due = Last PM + the policy's PM frequency, and the last maintenance date is set to the most recent task date.
Detail lines	Posted To Maintenance History is checked.
Work order	When no unposted lines remain: Status is Closed, Date Closed is today, and Posted To Maintenance History is set.
Notifications	An EMS work order post notification is sent.
Cost Accounting	No transactions are created.

See Reading updates and Notifications.

EMS Task fields

FIELD	REQUIRED	LIMITS
Activity	No	
Repair Type	Yes	Copied to history when lines using this task are posted.
Name	Yes	Up to 30 characters.
Description	No	Up to 128 characters.

Messages

MESSAGE	WHEN	WHAT TO DO
The work order was saved. Please add the first work order detail record.	After saving a new work order.	Click **OK** and enter the first detail line.
You are about to post N work order(s). Continue?	After clicking **Post work order(s)**.	Check N. Click **Yes** to post or **No** to cancel.
Work orders posted successfully.	Posting finished.	Review the closed work orders and the history.
Unable to post EMS work order records due to a technical error. An email has been sent to support.	Posting failed with a technical error.	Contact your administrator before you try again.
No valid record keys provided.	Posting was started with no work orders to post.	Change the filter so that it includes work orders, then post again.
One or more work order keys not found for this tenant.	A work order in the post could not be found; nothing was posted.	Refresh the grid and post again.
Record has been modified by someone else since being queried from the database, refresh and try your update again.	Saving a detail line or task that another user changed after you loaded it.	Refresh the grid and make your change again.
Record List contains System Data which cannot be deleted.	Deleting system detail lines or tasks.	These records cannot be deleted.

Tips and notes

> **Note:** The PM schedule is advanced using the policy's PM method and PM frequency, not the PM Method on the detail line. The line's PM Method is only copied to history. Schedules change only where the policy is assigned to that equipment.

> **Tip:** Enter **Hours At Service** or **Miles At Service** on the work order if you want posting to record a meter reading for the equipment.

> **Note:** Posting creates no Cost Accounting transactions.

> **Note:** The Options menu also has a **Post Work Order Record(s)** entry, but post from the **Post work order(s)** toolbar button.

> **Note:** When you delete detail lines or tasks, their comments and documents are deleted too. A copy of each deleted record is kept in audit history.

> **Note:** The EMS Task screen is a plain list of tasks. It has no post action.

Related topics

- Grid viewing and editing
- Grid filters
- Data grid overview and basics
- Equipment maintenance history
- Reading updates
- Maintenance entries
- Equipment tools: depreciation, policies and parts
- Notifications
- Security Administration: access levels by user
- User defined fields
- Navigating portals and pages

Reading updates

Overview

You enter new hour and mile readings for equipment on the EMS Reading Update screen, and then you post them. Posting adds the readings to Reading History, updates the equipment's last readings and removes the posted Reading Updates from the update list.

The EMS Reading Update Posting Errors window lists the readings that the system rejects. You can download that list. You can also correct an existing reading in Reading History.

Before you begin

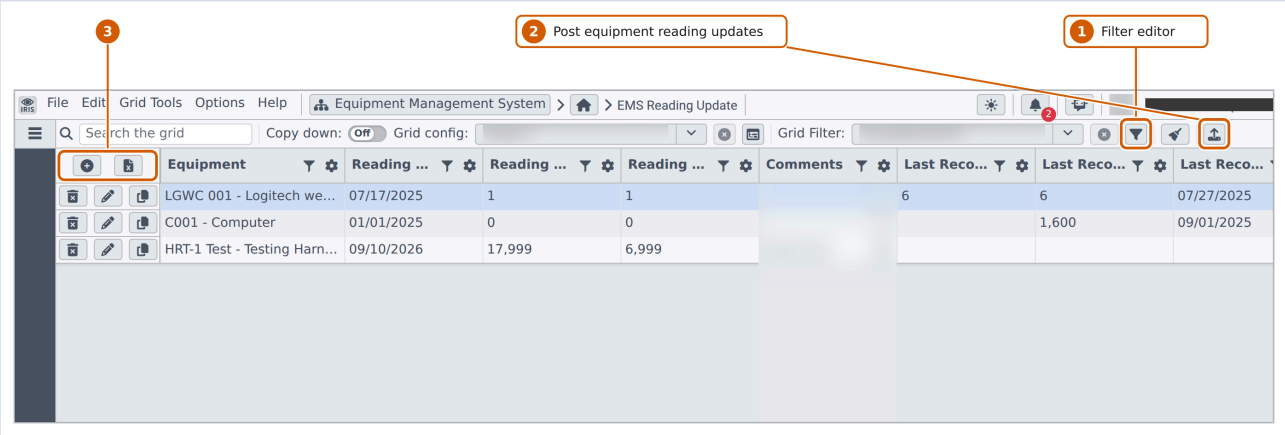
- Sign in to IRIS10 (see Logging in).
- Make sure you have access to the EMS Reading Update screen. Posting needs security level 4 on that screen. Administrators grant this level as described in Security Administration: access levels by user.
- Know how to add, edit, filter and save records in the shared data grid. See Grid viewing and editing and Grid filters.

Procedure

Enter a Reading Update

1. Open the EMS Reading Update screen (`/ems/readingupdate`).

   The grid shows the columns Equipment, Reading Date, Reading Hours, Reading Miles, Comments, Last Recorded Hour, Last Recorded Miles, Last Recorded Date, Equipment Status and Equipment Active.



The EMS Reading Update screen, with the toolbar and the reading columns.

   1. Filter editor: Filter to the readings you want to post

2. Post equipment reading updates
3. Reading and Last Recorded columns

2. Add a new record with the grid's add tool. You can enter it inline or in the pop-out editor.

   A new record opens. The pop-out editor shows the title **Reading Update** and the section **Reading Update Info**.

3. Choose the equipment from the **Equipment** dropdown.

   Last Recorded Hour, **Last Recorded Miles** and **Last Recorded Date** fill in automatically. You cannot edit these fields. **Equipment** is required. If it is missing, IRIS10 shows "Your {0} is required." with the field name in place of {0}.

4. Enter the **Reading Date**.
5. Enter the **Reading Hours**, the **Reading Miles**, or both.

   If a value is lower than the last recorded value, a warning appears (for example "The Hours just entered are less than the Last Recorded Hours Reading."). The warning does not stop you from entering the value.

6. Click **OK** to close the warning.
7. Optionally, enter **Comments**, up to 256 characters.
8. Save the record the same way you save any grid record.

   The record stays on the Reading Update grid until you post it.

Post Reading Updates

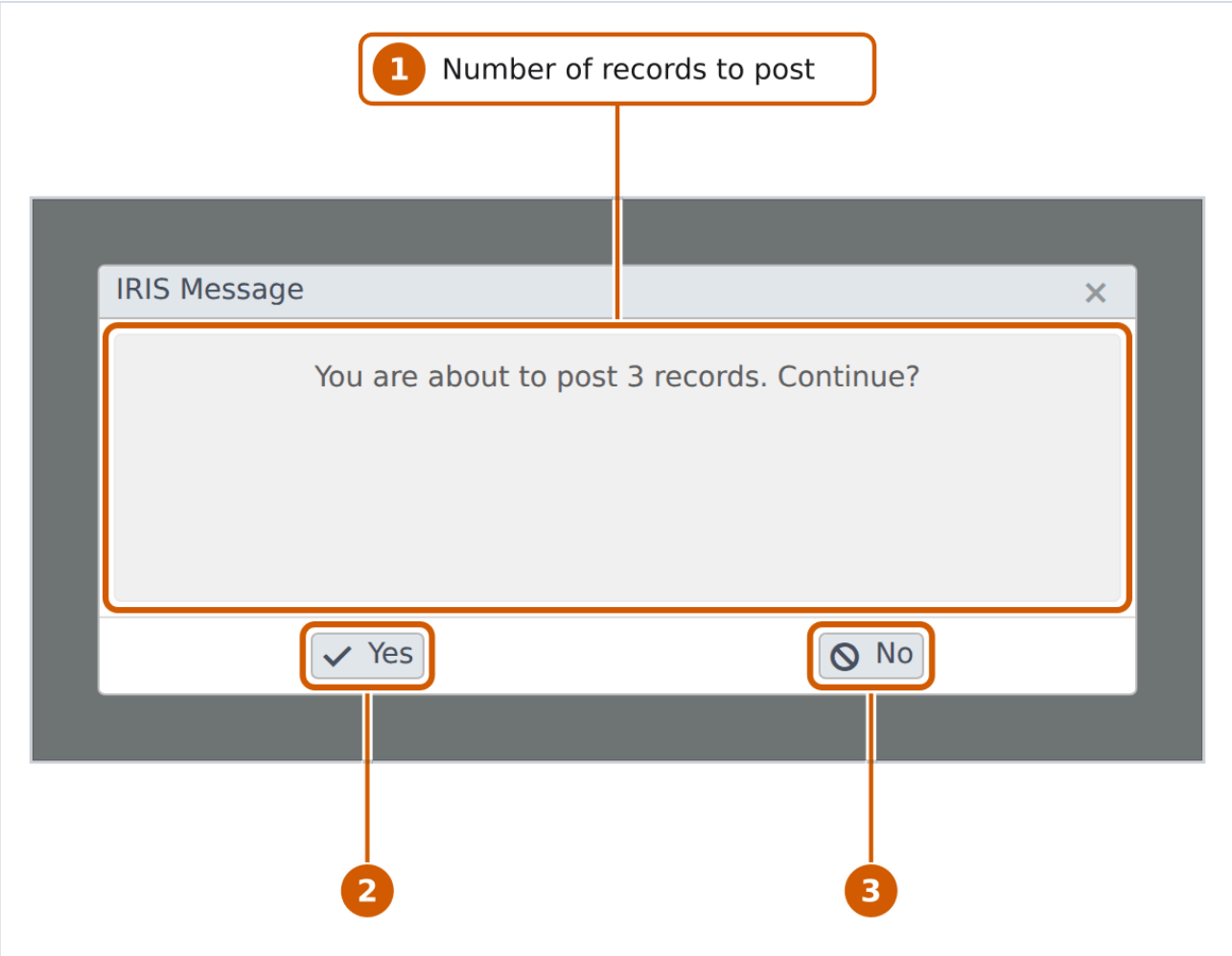
1. On the EMS Reading Update screen, filter the grid so it shows only the readings you want to post.

   Posting acts on every record that matches the current filter, including records on other pages. Selecting rows does not limit the records that posting sends.

2. Click **Post equipment reading updates** on the toolbar.

   > **Note:** Posting requires security level 4 on the EMS Reading Update screen.

   An "IRIS Message" window opens.



The confirmation that appears before posting. The count covers every record in the current filter.

1. Number of records to post
2. Yes posts
3. No cancels

3. Read the confirmation "You are about to post N records. Continue?". N is the number of records in the current filter.

   The window shows **Yes** and **No** buttons.

4. Click **Yes** to post.

   Posting starts. If you click **No** instead, the window cancels without posting.

5. Check the result.

   If posting succeeds, the grid reloads and "Reading updates posted successfully." appears. Posting adds the readings to Reading History with Reading Source "Update Readings", updates the equipment's last readings and removes the posted rows from the Reading Update grid. If the system rejects any readings, the EMS Reading Update Posting Errors window opens instead of the grid reloading.

Review and fix posting errors

1. In the EMS Reading Update Posting Errors window, review the "Posting Errors:" list.

   Each card shows one piece of equipment with a badge such as "2 Errors".
2. Read the table on each card. It shows the Field, the Invalid Entry and the Last Recorded value.
3. Optionally, download the errors with the CSV, PDF or JSON download icon. Hover over an icon to see which file type it downloads.

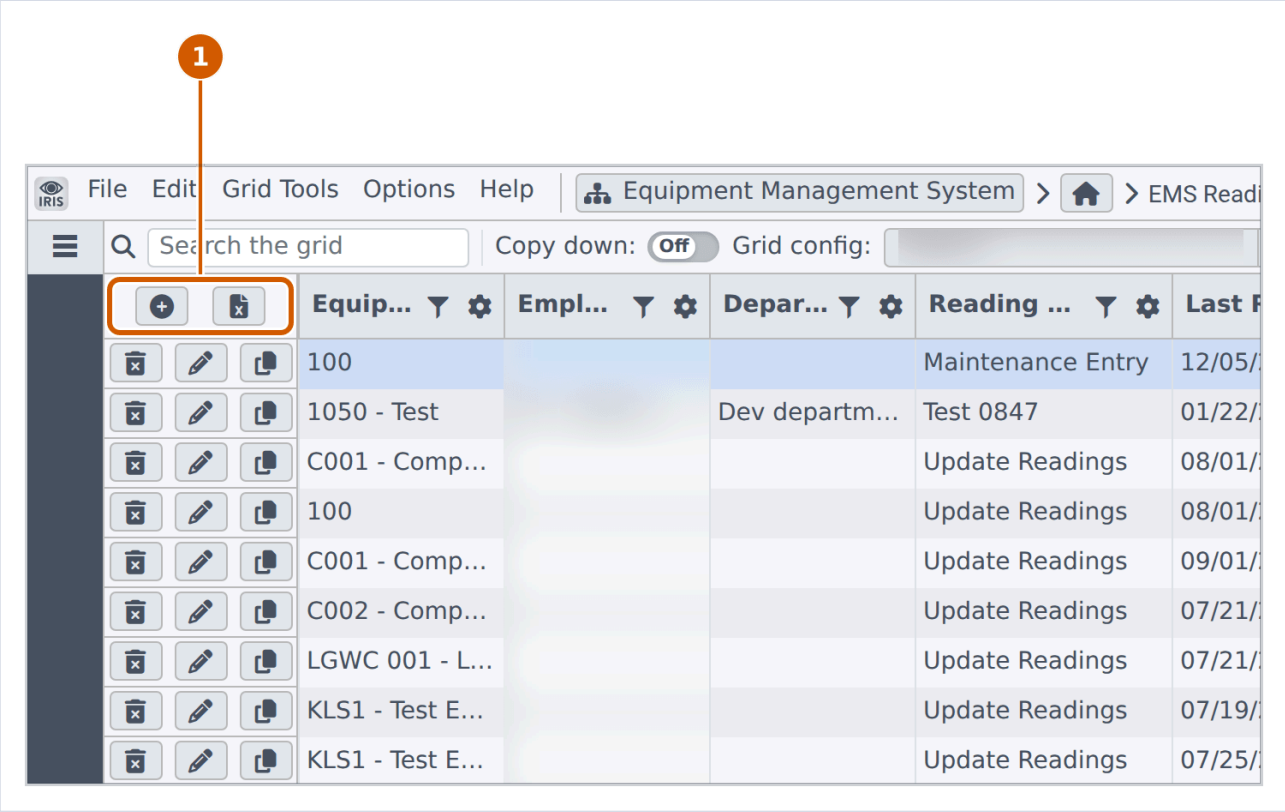
   The CSV file is named `ems-update-equipment-reading-posting-errors-<date>.csv`.
4. Close the window.

   The rejected readings stay on the Reading Update grid.
5. Correct the rejected readings on the Reading Update grid. Use the messages in Reasons a reading is rejected when posting.
6. Post again, as described in Post Reading Updates.

Correct a reading in Reading History

1. Open Reading History from the route you prefer:

ROUTE	HOW TO OPEN	WHAT OPENS
Equipment screen	With the equipment selected, click the tab button that opens its meter reading history. See Equipment tools: depreciation, policies and parts.	A warning asks you to check the readings so PM reports stay correct. After the warning, Reading History opens in a new browser tab.
Direct	Open the EMS Reading History screen (`/ems/readinghistory`).	The EMS Reading History grid.



The EMS Reading History grid, where you can correct posted readings.

1. Reading History columns

2. Find the reading you want to correct.
3. Open the reading for editing.

   The editor shows the title **Reading History** and the section **Reading History Info**.
4. Change the values you need: equipment, employee, department, Reading Source, reading date, hours, miles, lifetime totals or comments.
5. Make sure **Equipment** and **Reading Source** are filled in. **Reading Source** can be up to 50 characters and **Comments** up to 256.

   IRIS10 removes leading and trailing spaces when you save.
6. Save the record.

   Saving updates the history record. Saving does not recalculate the equipment's last readings or next PM due. If someone else changed the record after you loaded it, IRIS10 shows "Record has been modified by someone else since being queried from the database, refresh and try your update again.". Refresh the grid and make your change again.

Reference

EMS Reading Update grid columns

COLUMN	NOTES
Equipment	Required; chosen from a dropdown

COLUMN	NOTES
Reading Date	Date of the new reading
Reading Hours	New hour reading
Reading Miles	New mile reading
Comments	Up to 256 characters
Last Recorded Hour	Read-only
Last Recorded Miles	Read-only
Last Recorded Date	Read-only
Equipment Status	Status of the equipment
Equipment Active	Whether the equipment is active
Created Date / Created By / Last Updated Date / Updated By	Record audit columns

Reasons a reading is rejected when posting

MESSAGE	WHEN IT HAPPENS
Reading Date is before last recorded reading date of `<date>`	The Reading Date is earlier than the equipment's last recorded reading date
Reading Miles is before last recorded reading of `<miles>`	The Reading Miles is lower than the last recorded miles (checked only when both values are present)
Reading Hours is before last recorded reading of `<hours>`	The Reading Hours is lower than the last recorded hours (checked only when both values are present)
Reading already recorded	The Reading Date equals the last recorded date and either the hours or the miles equal the last recorded value

Messages when posting

MESSAGE	MEANING
You are about to post N records. Continue?	Confirmation before posting. N is every record in the current filter.
Reading updates posted successfully.	Posting succeeded. The grid reloads.
Unable to post reading updates due to a technical error. An email has been sent to support.	Posting failed because of a technical error. Support has been notified.

Posting Errors CSV file columns

The column names below are the headers in the CSV file.

COLUMN	CONTENTS
Equipment	The equipment
Submitted Date	Reading Date entered

COLUMN	CONTENTS
Submitted Miles	Reading Miles entered
Submitted Hours	Reading Hours entered
Last Recorded Date	Equipment's last recorded date
Last Recorded Miles	Equipment's last recorded miles
Last Recorded Hours	Equipment's last recorded hours
Error Messages	All messages for the reading, separated by a pipe (\

EMS Reading History grid columns

COLUMN	NOTES
Equipment	Required
Employee	
Department	
Reading Source	Required; up to 50 characters. Readings added by posting show "Update Readings".
Last Reading Date	
Last Reading Hours	
Last Reading Miles	
Lifetime Total Hours	
Lifetime Total Miles	
Comments	Up to 256 characters
Created Date / Created By / Last Updated Date / Updated By	Record audit columns
Notes / Documents	Notes and documents attached to the record

Tips and notes

Important: Posting acts on every record that matches the grid's current filter, including records on other pages, not only the rows you selected. Check the record count in the confirmation before you click **Yes**.

Tip: The low-reading warning during entry does not stop you from saving, but posting rejects hours or miles that are lower than the last recorded values. Fix the reading before you post.

Important: Editing a Reading History record does not recalculate the equipment's last readings or its next PM due date. Check the readings carefully so PM reports stay correct.

> **Note:** The Options menu also has a Post Reading Update Record(s) item. This page uses the **Post equipment reading updates** toolbar button.

> **Note:** When you post readings, IRIS10 sends an EMS reading update post notification. See Notifications.

Related topics

- Grid filters
- Grid viewing and editing
- Data grid overview and basics
- Security Administration: access levels by user
- Notifications
- Maintenance entries
- Equipment maintenance history
- Equipment tools: depreciation, policies and parts

Equipment maintenance history

Overview

Maintenance history is created when you post maintenance entries or work orders. You cannot add or edit maintenance history on the **Maintenance History** screen. **Void** is the only way to change a record there.

Use this page to:

- Review the maintenance history posted for equipment.
- Void a maintenance history record that was posted in error, and see what the void reverses.
- Review an item's department and employee assignment history.
- Review the costs charged to equipment on the **Equipment Costs** screen.
- Open these history screens from the **Equipment** screen, filtered to one piece of equipment.

For how history is created, see Maintenance entries and Work orders.

Before you begin

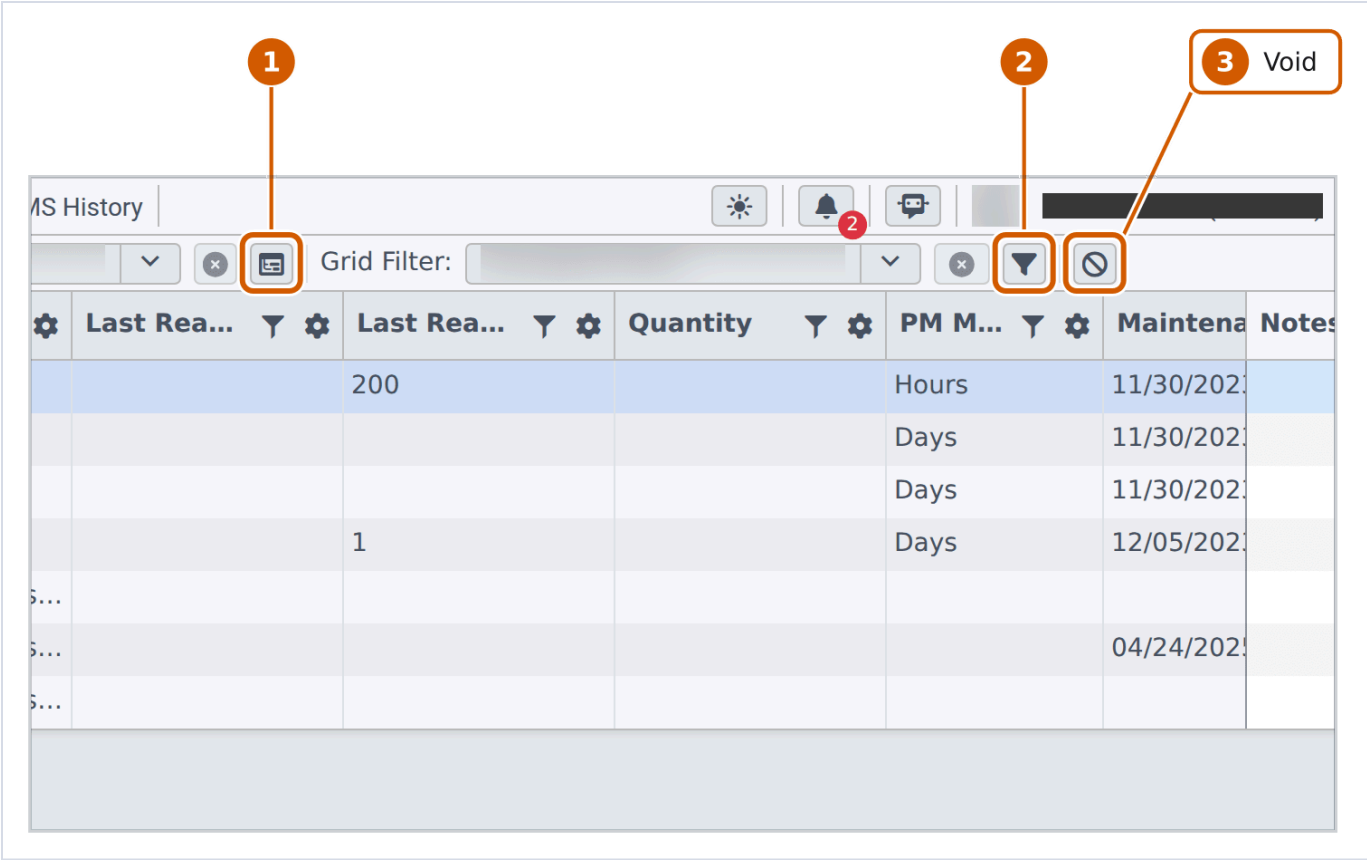
- Sign in to IRIS10.
- Make sure you have access to the Equipment Management screens.
- To void a record, you need security level 4 on the **Maintenance History** screen. See Security Administration: access levels by user.

Procedure

Review maintenance history

1. Open the **Maintenance History** screen (the path in the browser is `/ems/history`).

   The **Maintenance History** grid opens with columns such as **Equipment**, **Policy**, **Maintenance Date**, **Work Order** and **Posted From Work Order**. There is no button for adding records.



The Maintenance History screen. Void is on the toolbar; there is no button for adding records.

1. Grid configuration editor
2. Filter editor
3. Void

2. Click **Filter editor** on the toolbar to limit the grid, for example to one piece of equipment or a range of maintenance dates.

   The grid filter editor opens. When a filter is applied, **Clear filter** becomes available so you can remove it. See Grid filters.
3. Click **Grid configuration editor** to choose which columns are shown and how they are arranged.

   The grid configuration editor opens. **Clear grid configuration** goes back to the default layout. See Grid configurations.
4. Read the **Posted From Work Order**, **Work Order** and **Work Order Detail** columns to see whether a record was posted from a work order or from a maintenance entry.

Void a maintenance history record

1. On the **Maintenance History** screen, select the record you want to void.

   > **Note:** Only users with security level 4 on this screen can void.

2. Click **Void** on the toolbar.

A confirmation prompt opens. If you did not select a record, the message `Please select a maintenance history record to void.` appears instead.

> **Note:** Users below security level 4 do not see the **Void** button. **Void** is on the toolbar only; there is no **Options** menu item for it.

3. Read the prompt.
   - For a record posted from a work order, it reads `Work order <number> posted <N> maintenance history record(s).` It says that the void removes the record (or all N records, not only the one you selected) and clears the posted flag on the work order, then asks `Continue?`. The work order number is the work order's number, or `#<key>` if the work order has no number. The count is the number of maintenance history records for that work order.
   - For a record that did not come from a work order, it reads `This record did not come from a work order. The void removes this record only, and rolls the equipment reading back. Continue?`

   If IRIS10 cannot read the count, the message `An error occurred while reading the records for that work order. An email has been sent to support.` appears and no void is offered.
4. Click **Void** in the prompt to go ahead.

> **Note:** To stop instead, click **Cancel**. **Cancel** closes the prompt and changes nothing.

5. Wait for the void to finish.

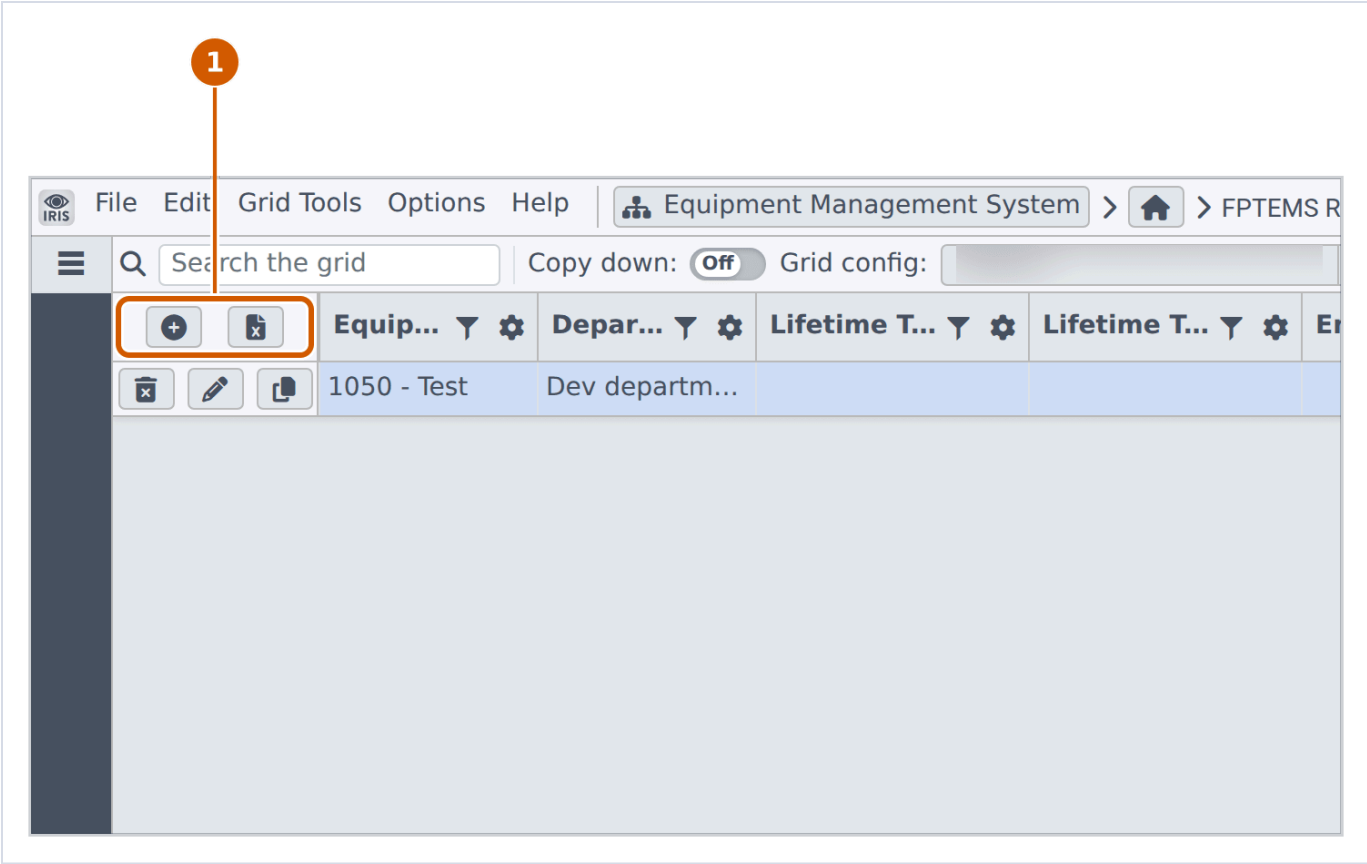
   If the void works, the grid refreshes and `The void completed successfully.` appears. If the void is refused for a validation reason, the reason is shown. If the void fails for any other reason, `An error occurred during the void. An email has been sent to support.` appears.

Review assignment history for one piece of equipment

1. Open the equipment record on the **Equipment** screen and select the **Related Department History** tab.

   The tab lists department assignments, newest **Assigned Date** first.
2. Click **View Related Department History**.

   The **Related Department History** screen opens in a new browser tab, filtered to that equipment. The screen is read-only.



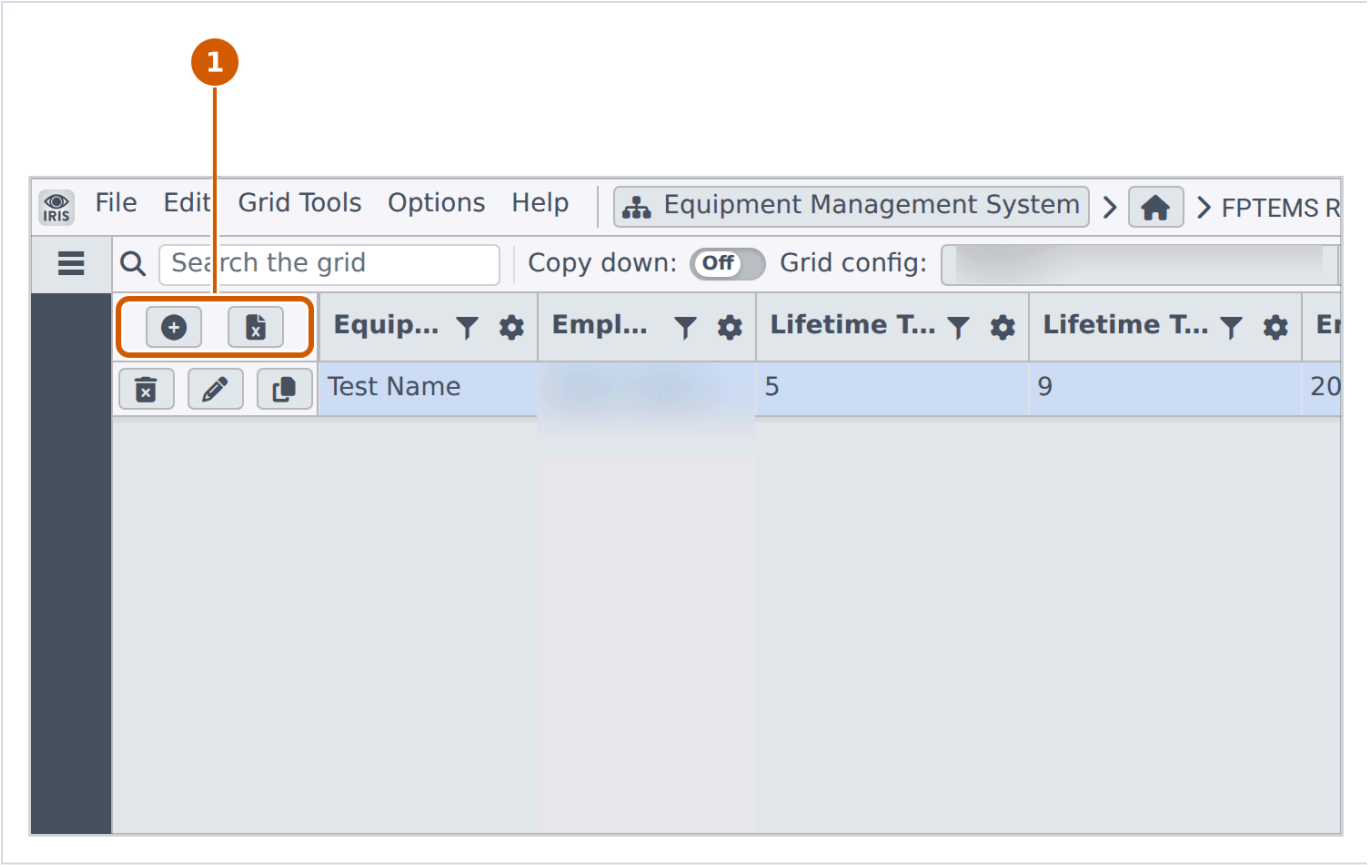
The read-only Related Department History screen.

1. Assignment history columns

3. Back on the **Equipment** screen, select the **Related Employee History** tab.

   The tab lists employee assignments, newest **Assigned Date** first.
4. Click **View Related Employee History**.

   The **Related Employee History** screen opens in a new browser tab, filtered to that equipment. The screen is read-only.



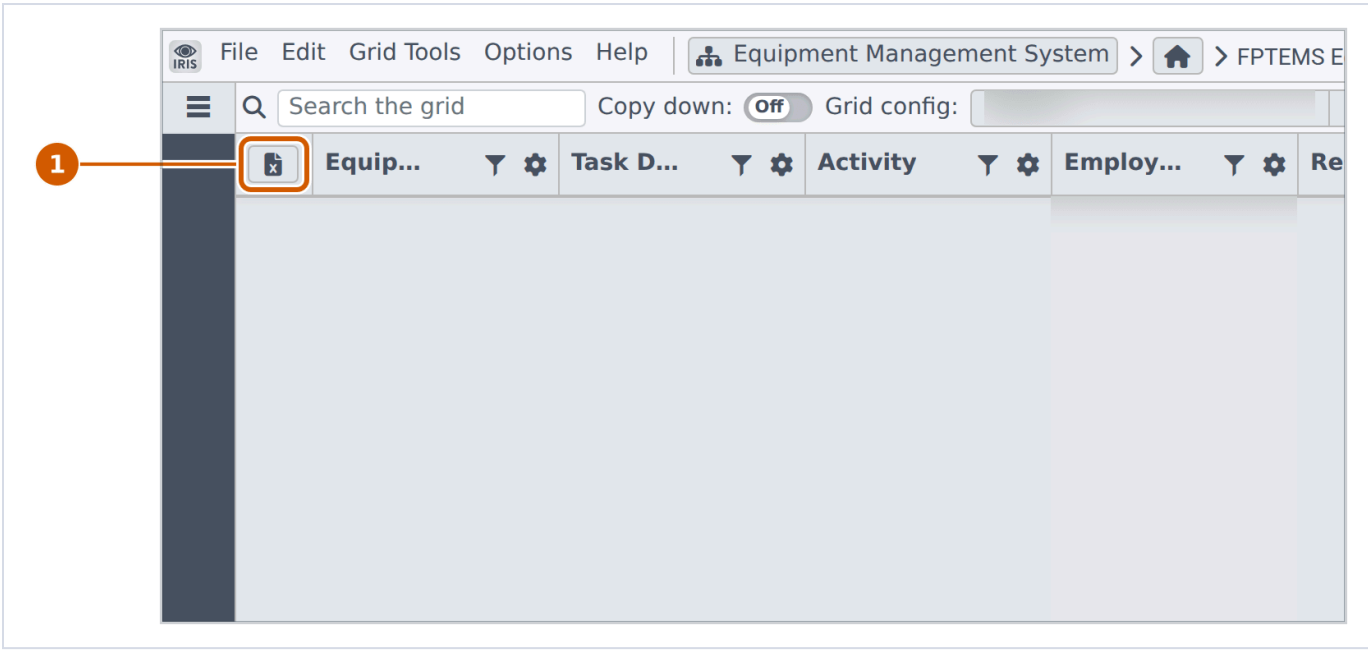
The read-only Related Employee History screen.

1. Assignment history columns

Review equipment costs

1. Open the **Equipment Costs** screen (the path in the browser is `/ems/equipmentcosts`).

   The read-only **Equipment Costs** grid opens with columns such as **Equipment**, **Task Date**, **Activity**, **Resource Type** and **Total Resource Cost**. There is no button for adding records.



The read-only Equipment Costs screen.

1. Cost columns
2. Use the equipment drop-down list on the toolbar to choose an equipment item.
3. Read the **Total cost** label on the toolbar.

   The label shows `Total cost: $` followed by the sum of **Total Resource Cost**, in red.

Reference

Maintenance History toolbar

BUTTON	TOOLTIP	NOTES
Clear grid configuration	Click to clear grid configuration.	Available only after the grid layout has been changed.
Grid configuration editor	Click to open grid configuration editor.	
Clear filter	Click to clear applied grid filter.	Available only while a filter is applied.
Filter editor	Click to open grid filter editor.	
Void	Void the selected record. A record posted from a work order takes every other record for that work order with it.	Shown only to users with security level 4.

Maintenance History columns

- **Equipment**
- **Part List**

- **Policy**
- **Vendor**
- **RepairType**
- **Last Reading Miles**
- **Last Reading Hours**
- **Quantity**
- **PM Method**
- **Maintenance Date (MM/dd/yyyy)**
- **Employee**
- **Work Order**
- **Work Order Detail**
- **Posted From Work Order**
- **Work Order Description**
- **Service Description**
- The user-defined fields (10). See User defined fields.
- **Created Date**
- **Created By**
- **Last Updated Date**
- **Updated By**
- **Notes**
- **Documents**

What a void reverses

ITEM	RECORD POSTED FROM A WORK ORDER	RECORD ENTERED BY HAND (FROM A MAINTENANCE ENTRY)
Maintenance history records	Every maintenance history record of that work order is removed, not only the one you selected.	Only the selected record is removed.
Reading history	The matching reading records are removed.	The matching reading record is removed.
Equipment last readings	Recalculated from the newest remaining reading.	Recalculated from the newest remaining reading.
PM schedule (last PM, next PM due, last maintenance date)	Recalculated from the newest remaining history record. If none remains, last PM is reset to 0 and next PM due and last maintenance date are cleared.	Recalculated from the newest remaining history record. If none remains, last PM is reset to 0 and next PM due and last maintenance date are cleared.
Work order	Detail lines and header become unposted again (posted flag cleared). A Closed work order goes back to Open and its closed date and time are cleared. Work orders that are Open or on Hold keep their status.	Not applicable.

ITEM	RECORD POSTED FROM A WORK ORDER	RECORD ENTERED BY HAND (FROM A MAINTENANCE ENTRY)
Maintenance entry	Not applicable.	The maintenance entry is restored on the **Maint Entry** screen as unposted. It is a new record and does not get its original key back.
Cost Accounting transactions	None created.	None created.
Notifications	None sent.	None sent.

How the next PM due is recalculated after a void

PM METHOD	NEXT PM DUE
Days	Date of the newest remaining record plus the PM frequency
Hours	Reading of the newest remaining record plus the PM frequency
Miles	Reading of the newest remaining record plus the PM frequency

Related Department History and Related Employee History columns

RELATED DEPARTMENT HISTORY	RELATED EMPLOYEE HISTORY
Equipment	**Equipment**
Department	**Employee**
Lifetime Total Hours	**Lifetime Total Hours**
Lifetime Total Miles	**Lifetime Total Miles**
Ending Lifetime Total Hours	**Ending Lifetime Total Hours**
Ending Lifetime Total Miles	**Ending Lifetime Total Miles**
Assigned Date	**Assigned Date**
Reassigned Date	**Reassigned Date**
Created Date	**Created Date**
Created By	**Created By**
Last Updated Date	**Last Updated Date**
Updated By	**Updated By**
Notes	**Notes**
Documents	**Documents**

Equipment Costs columns

- **Equipment**
- **Task Date**

- **Activity**
- **Employee**
- **Resource Type**
- **Pay Type**
- **Quantity**
- **Bill Rate**
- **Resource Rate**
- **Total Resource Cost**
- **Inventory Location**
- **Description**
- **Comments**
- **Created Date**
- **Created By**
- **Last Updated Date**
- **Updated By**

Messages

MESSAGE	WHEN IT APPEARS
`Please select a maintenance history record to void.`	You clicked **Void** without selecting a record.
`An error occurred while reading the records for that work order. An email has been sent to support.`	IRIS10 could not count the work order's records, so no void is offered.
`The void completed successfully.`	The void finished; the grid refreshes.
`An error occurred during the void. An email has been sent to support.`	The void failed for a reason other than validation.

Terms

TERM	MEANING
Void	Reverses a posted maintenance history record. For a record posted from a work order, all of that work order's history records are reversed.
Posted From Work Order	Shows whether the history record was posted from a work order rather than from a maintenance entry.
PM Method	How preventive maintenance is scheduled: by days, hours or miles.
Maintenance Date	The date the maintenance was performed, shown as MM/dd/yyyy.
Total Resource Cost	The cost of one resource line on **Equipment Costs**. The **Total cost** label adds these together.
Related Department History	Read-only history of the departments a piece of equipment has been assigned to.
Related Employee History	Read-only history of the employees a piece of equipment has been assigned to.

Tips and notes

Important: Voiding one record that was posted from a work order removes every maintenance history record of that work order, not only the one you selected. Read the record count in the prompt before you click **Void**.

Note: You cannot add or edit maintenance history on the **Maintenance History** screen. History is created by posting maintenance entries and work orders. To correct a posted record, void it, fix the maintenance entry or work order, and post it again.

Note: A void creates no Cost Accounting transactions and sends no notification. For voiding Cost Accounting transactions, see Transactions: void, reinstate and export.

Tip: A maintenance entry restored by a void comes back as a new unposted record on the **Maint Entry** screen. Search for it by its details, not by its old key.

Note: Related Department History, **Related Employee History** and **Equipment Costs** are read-only. You can also open each of them from its tab button on the **Equipment** screen; it opens in a new browser tab, filtered to that equipment.

Related topics

- Maintenance entries
- Work orders
- Reading updates
- Equipment tools: depreciation, policies and parts
- Grid filters
- Grid configurations
- Data grid overview and basics
- User defined fields
- Security Administration: access levels by user
- Transactions: void, reinstate and export

Equipment tools: depreciation, policies and parts

Overview

This page covers the tools on the Equipment screen that calculate depreciation, assign maintenance policies, and open the policy and part grids:

- **Calculate Depreciation** recalculates depreciation for all qualifying equipment up to a month-end date.
- **Assign Policies** opens a window where you assign policies to a piece of equipment or remove them. A separate screen assigns one policy to many equipment items.
- Tab buttons in the **Equipment Information:** panel open the Policy, Policy List, Part and Part List grids.

Before you begin

- Sign in to IRIS10 and work in the Equipment Management System portal.
- Know how to select rows and use the toolbar on a grid. See Data grid overview and basics and Grid viewing and editing.
- To calculate depreciation, you need access level 4 or higher on Equipment. See Security Administration: access levels by user.
- Fill in the Depreciation UOM and the cost, life and purchase details on the equipment records you want depreciated.

Procedure

Calculate depreciation for all equipment

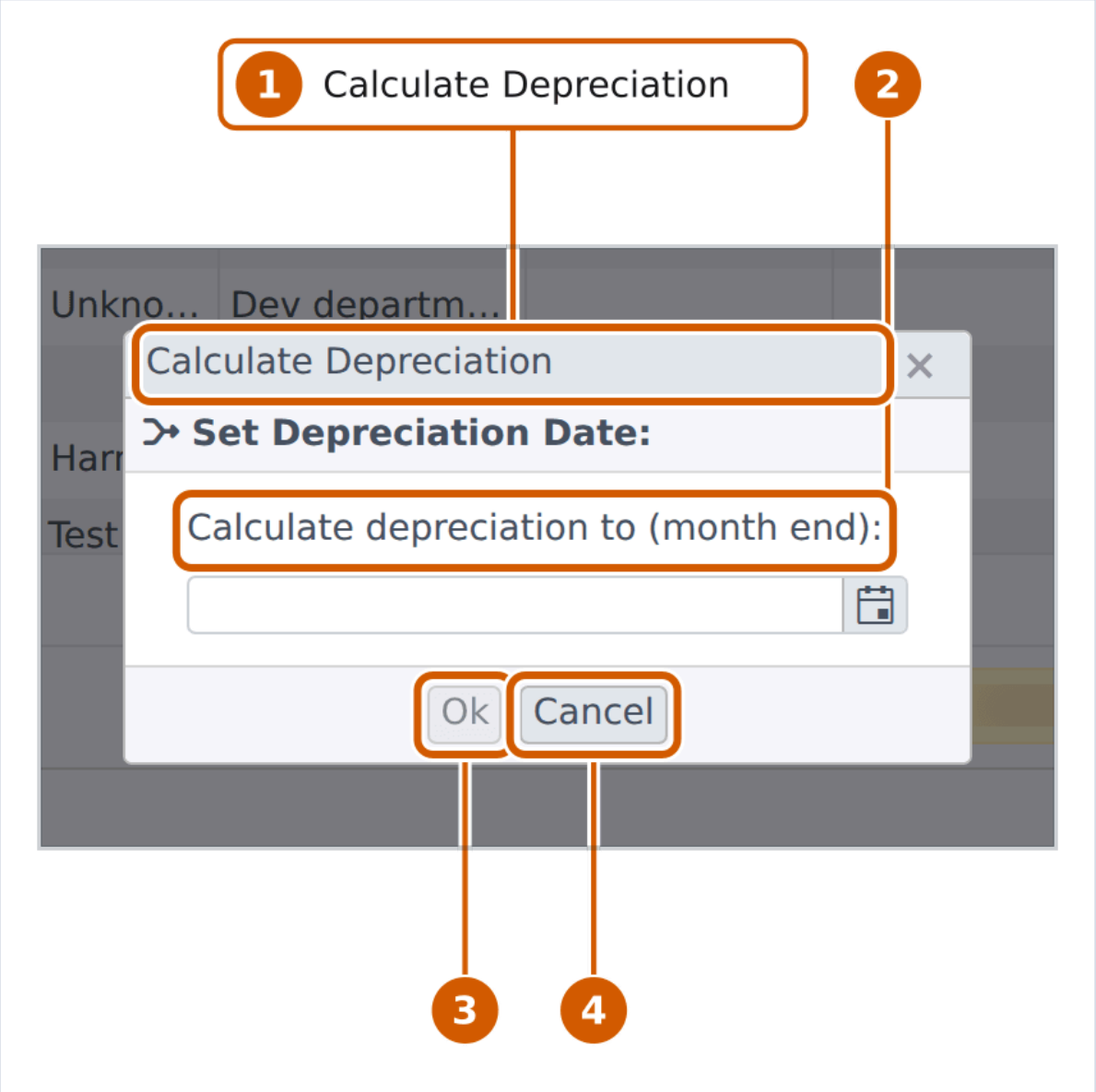
> **Important: Ok** in the Calculate Depreciation window recalculates every qualifying equipment record at once, whatever rows you have selected or filtered, and there is no further confirmation.

1. On the Equipment screen, open the Calculate Depreciation window:

ROUTE	WHERE	WHAT OPENS
Toolbar	Click the Calculate Depreciation toolbar button (tooltip "Click to calculate depreciation.")	The **Calculate Depreciation** window
Main menu	Choose **Options** > **Calculate Depreciation**	The **Calculate Depreciation** window

The window opens with the heading **Set Depreciation Date:**, an empty date picker, and **Ok** and **Cancel** buttons. **Ok** is disabled.

> **Note:** This step requires access level 4 or higher on Equipment.



The Calculate Depreciation window. Ok becomes available once you choose a month-end date.

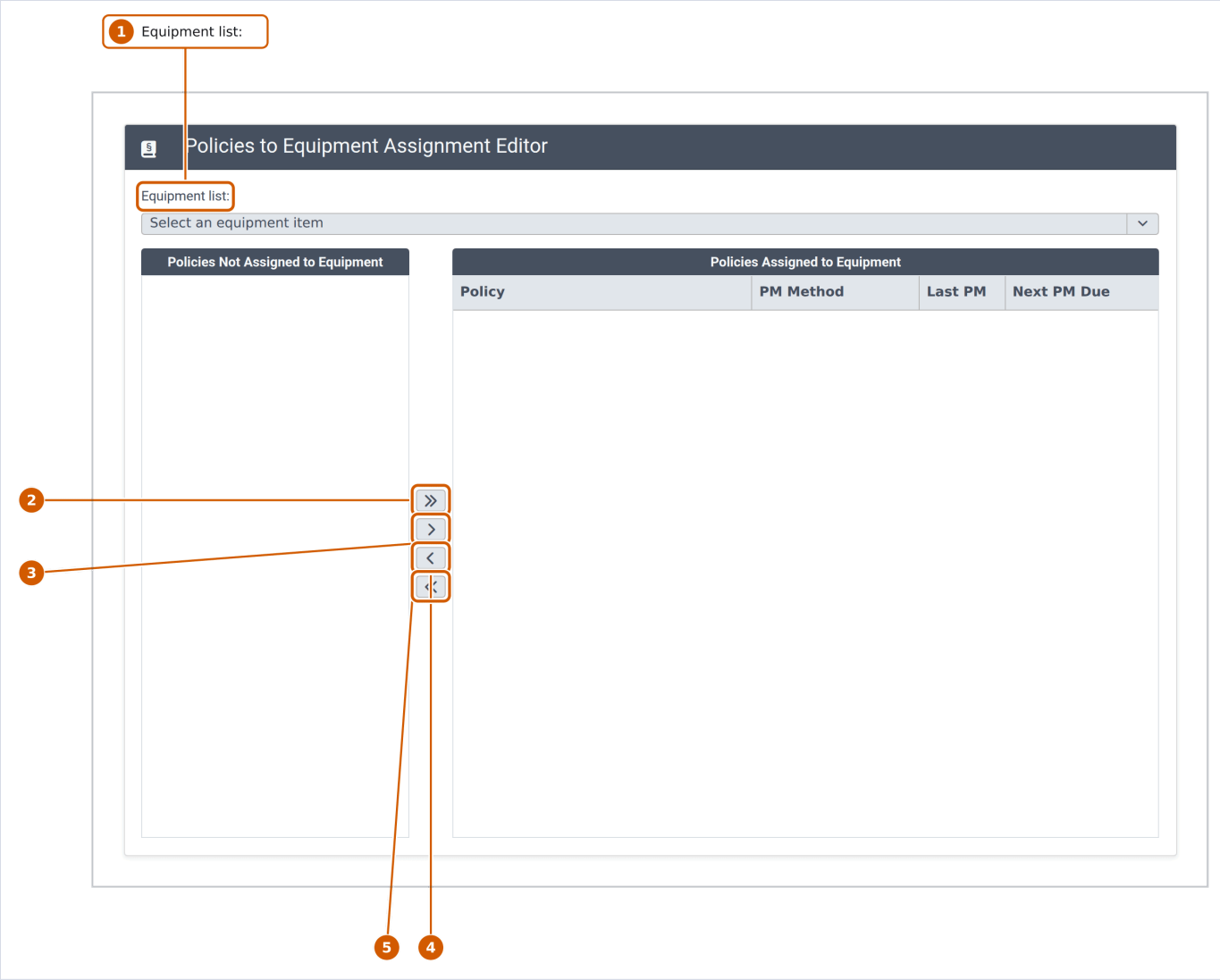
1. Calculate Depreciation
2. Calculate depreciation to (month end):
3. Ok (disabled until a date is chosen)
4. Cancel

2. In **Calculate depreciation to (month end):**, choose the month-end date to calculate depreciation to. **Ok** becomes available once a valid date is chosen. If the entry is not a date, the message "Please enter a valid date." appears. The month you choose counts as a whole month.

3. Click **Ok**. IRIS10 shows a loading indicator and recalculates depreciation for all qualifying equipment at once, whatever rows are selected or filtered. The window closes and the message "Depreciation was recalculated for N equipment records." (or "...for 1 equipment record.") appears. N counts only the qualifying records. The Equipment grid reloads to show the new values. No notification is sent.
4. To leave without calculating, click **Cancel** instead of **Ok**. The window closes and nothing is calculated.

Open the policy assignment for a piece of equipment

1. On the Equipment screen, select the equipment row in the grid. The row is selected. If you click a tab button without a selected row, the message "Select an equipment record first." appears.
2. In the **Equipment Information:** panel below the grid, click the **Assign Policies** tab button. A window titled **Assign Policies** opens with the same assignment screen as Policies to Equipment Assignment Editor. **Equipment list:** already shows the selected equipment, and both policy lists load.



Assigning policies to a piece of equipment. Each arrow saves as soon as you click it.

1. Equipment list:
2. Assign all
3. Assign one
4. Unassign one
5. Unassign all

> **Important:** The assign screens have no Save button. Every arrow click, including assign all and unassign all, saves at once with no confirmation.

Assign policies to a piece of equipment

1. If **Equipment list:** is empty, choose the equipment. You can type part of its name or description to filter the list. The **Policies Not Assigned to Equipment** list (left) and the **Policies Assigned to Equipment** list (right) show the policies for that equipment.

2. To assign one policy, select it in **Policies Not Assigned to Equipment**. The policy is selected.
3. Click the assign-one arrow (tooltip "Click to assign the selected policy to the selected equipment item."). The assignment saves at once, with no confirmation. A message "The policy: <name> was assigned to equipment item: <equipment>." appears for about 4 seconds, and both lists refresh. The new assignment starts with Last PM 0.
4. To assign every remaining policy, click the assign-all arrow (tooltip "Click to assign all policies to the selected equipment item."). All active policies not yet assigned are assigned at once, with no confirmation. Each starts with Last PM 0 and a blank Next PM Due. The message "All policies assigned for the selected equipment item." appears.

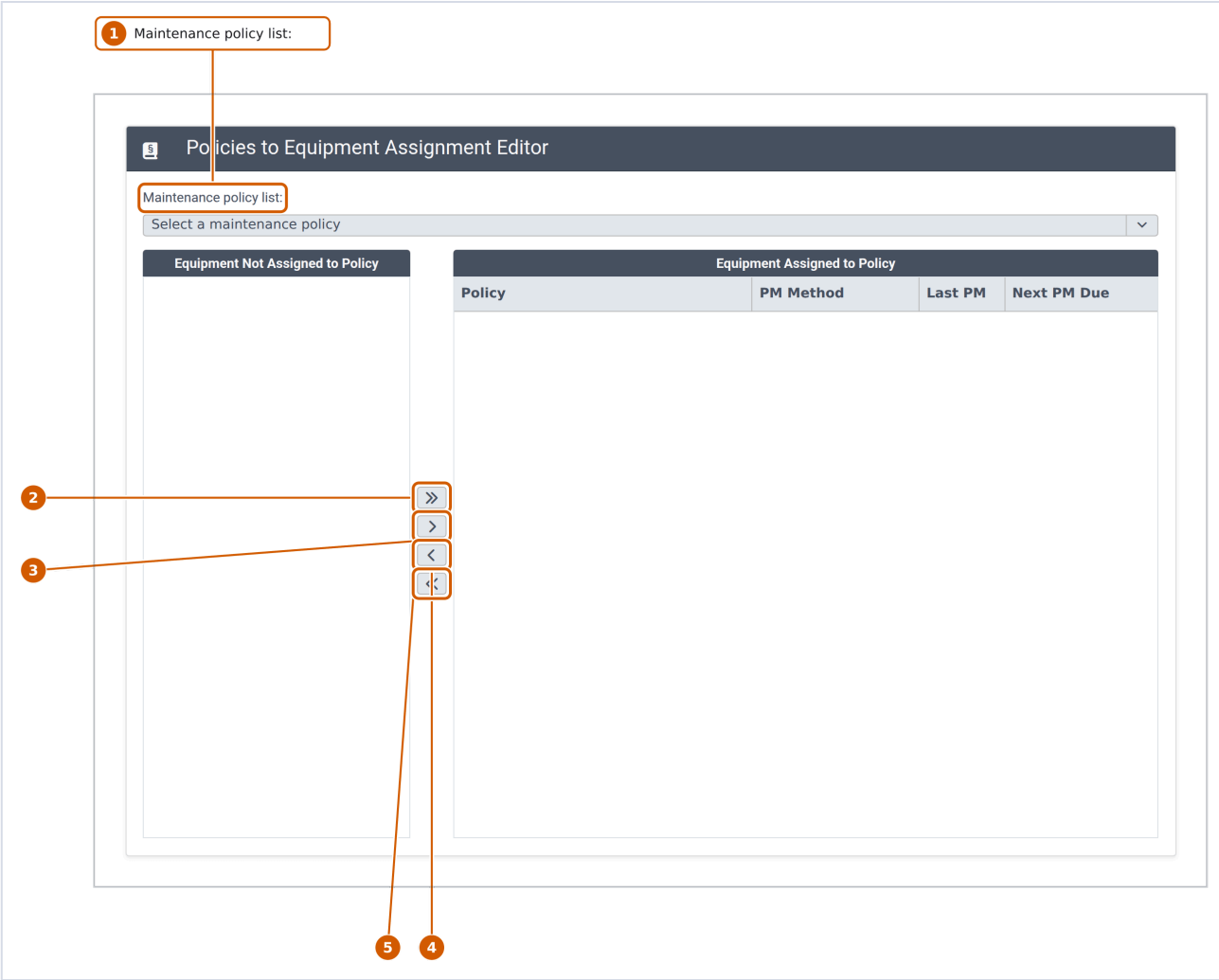
Unassign policies from a piece of equipment

1. To unassign one policy, select it in **Policies Assigned to Equipment**. The policy is selected.
2. Click the unassign-one arrow (tooltip "Click to unassign the selected policy from the selected equipment item."). The assignment is removed at once, with no confirmation, together with that equipment's PM schedule for the policy (Last PM, Next PM Due) and the assignment's comments and documents. A message "The policy: <name> was unassigned from equipment item: <equipment>." appears and both lists refresh.
3. To remove every policy from the equipment, click the unassign-all arrow (tooltip "Click to unassign all policies from the selected equipment item."). All assignments and their PM schedules are removed at once, with no confirmation. The message "All policies unassigned for the selected equipment item." appears.

> **Important:** Unassigning a policy removes that equipment's PM schedule for the policy, including Last PM and Next PM Due. Only the single unassign arrow also deletes the assignment's comments and documents. Unassign all removes the assignments and their PM schedules without that step.

Assign a policy to many equipment items

1. Open the policy-to-equipment assignment screen (browser path `/ems/policyequipassign`). The screen shows **Maintenance policy list:** and the lists **Equipment Not Assigned to Policy** (left) and **Equipment Assigned to Policy** (right), with four arrow buttons between them.



Assigning one maintenance policy to many equipment items.

1. Maintenance policy list:
2. Assign all
3. Assign one
4. Unassign one
5. Unassign all

2. In **Maintenance policy list:**, choose the policy. You can type part of its name to filter the list. The equipment lists load for that policy.
3. Click the assign-all arrow (tooltip "Click to assign all the equipment items to the selected policy.") to assign every remaining equipment item. The assignment saves at once, with no confirmation. Assign all adds only active equipment not yet assigned to the policy. Each new assignment starts with Last PM 0 and a blank Next PM Due.
4. Alternatively, select equipment and click the assign-one arrow (tooltip "Click to assign the selected equipment items to the selected policy."). The assignment saves at once, with no confirmation.
5. To remove one equipment item, click the unassign-one arrow (tooltip "Click to unassign the selected equipment item from the selected policy."). The assignment and the equipment's PM schedule for the policy are removed at once, with no confirmation.

6. To remove all equipment, click the unassign-all arrow (tooltip "Click to unassign all equipment items from the selected policy."). The assignments and the equipment's PM schedule for the policy are removed at once, with no confirmation.

Reference

Depreciation methods (by Depreciation UOM)

Depreciation is calculated only for equipment that meets its method's criteria.

DEPRECIATION UOM	EQUIPMENT INCLUDED ONLY IF	HOW DEPRECIATION IS WORKED OUT	LIMIT
Years	Total cost above 0, expected life above 0, and a purchase date before the month after the chosen date	Straight line: (total cost − salvage value) ÷ expected life ÷ 12, times the whole months from the purchase date to the end of the chosen month	After the expected life has passed, depreciation stays at cost minus salvage value and the current-year amount is 0
Miles	Expected life above 0, purchase price above 0, a purchase date and a last miles reading	((purchase price + setup cost − salvage) ÷ expected life) × last miles reading	Capped at purchase price plus setup cost minus salvage
Hours	Expected life above 0, purchase price above 0, a purchase date and a last hours reading	((purchase price + setup cost − salvage) ÷ expected life) × last hours reading	Capped at purchase price plus setup cost minus salvage

Miles-based equipment uses its last miles reading, and hours-based equipment uses its last hours reading. See Reading updates. For units of measure and fiscal years, see Units of measure, fiscal years and organizations.

Calculate Depreciation window

ITEM	WHAT IT DOES
Set Depreciation Date:	Heading of the window
Calculate depreciation to (month end):	Date picker for the month-end date. Starts empty each time the window opens.
Ok	Disabled until a valid date is chosen. Recalculates all qualifying equipment at once.
Cancel	Closes the window without calculating

Arrow buttons on the equipment-to-policies screen

BUTTON	TOOLTIP
Assign all	Click to assign all policies to the selected equipment item.

BUTTON	TOOLTIP
Assign one	Click to assign the selected policy to the selected equipment item.
Unassign one	Click to unassign the selected policy from the selected equipment item.
Unassign all	Click to unassign all policies from the selected equipment item.

Arrow buttons on the policy-to-equipment screen

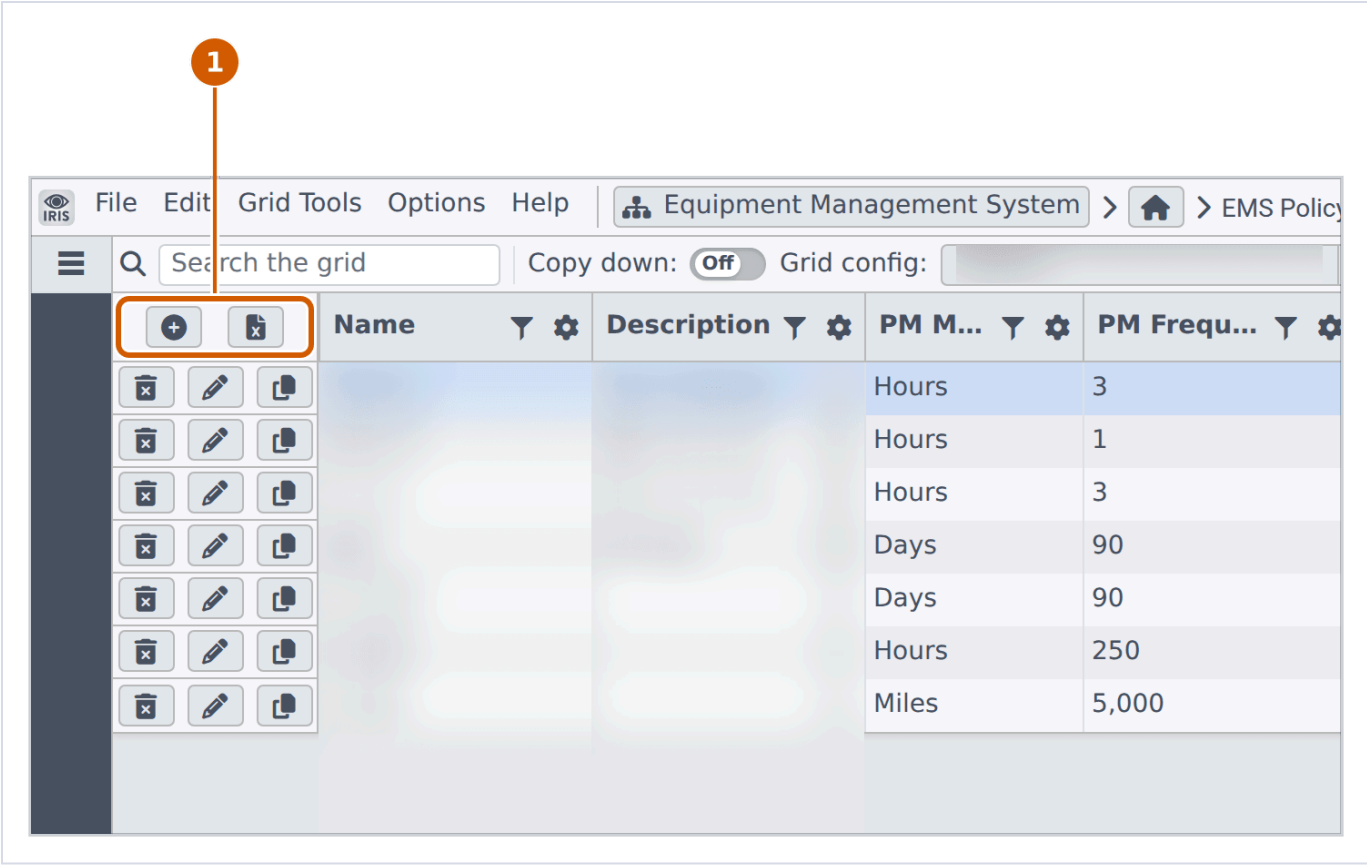
BUTTON	TOOLTIP
Assign all	Click to assign all the equipment items to the selected policy.
Assign one	Click to assign the selected equipment items to the selected policy.
Unassign one	Click to unassign the selected equipment item from the selected policy.
Unassign all	Click to unassign all equipment items from the selected policy.

Assigned-list columns on both assign screens

COLUMN	SHOWS
Policy	The assigned item
PM Method	The policy's PM method
Last PM	The last PM value; 0 for a new assignment
Next PM Due	When the next PM is due; blank for a new assignment

Policy, Policy List, Part and Part List grids

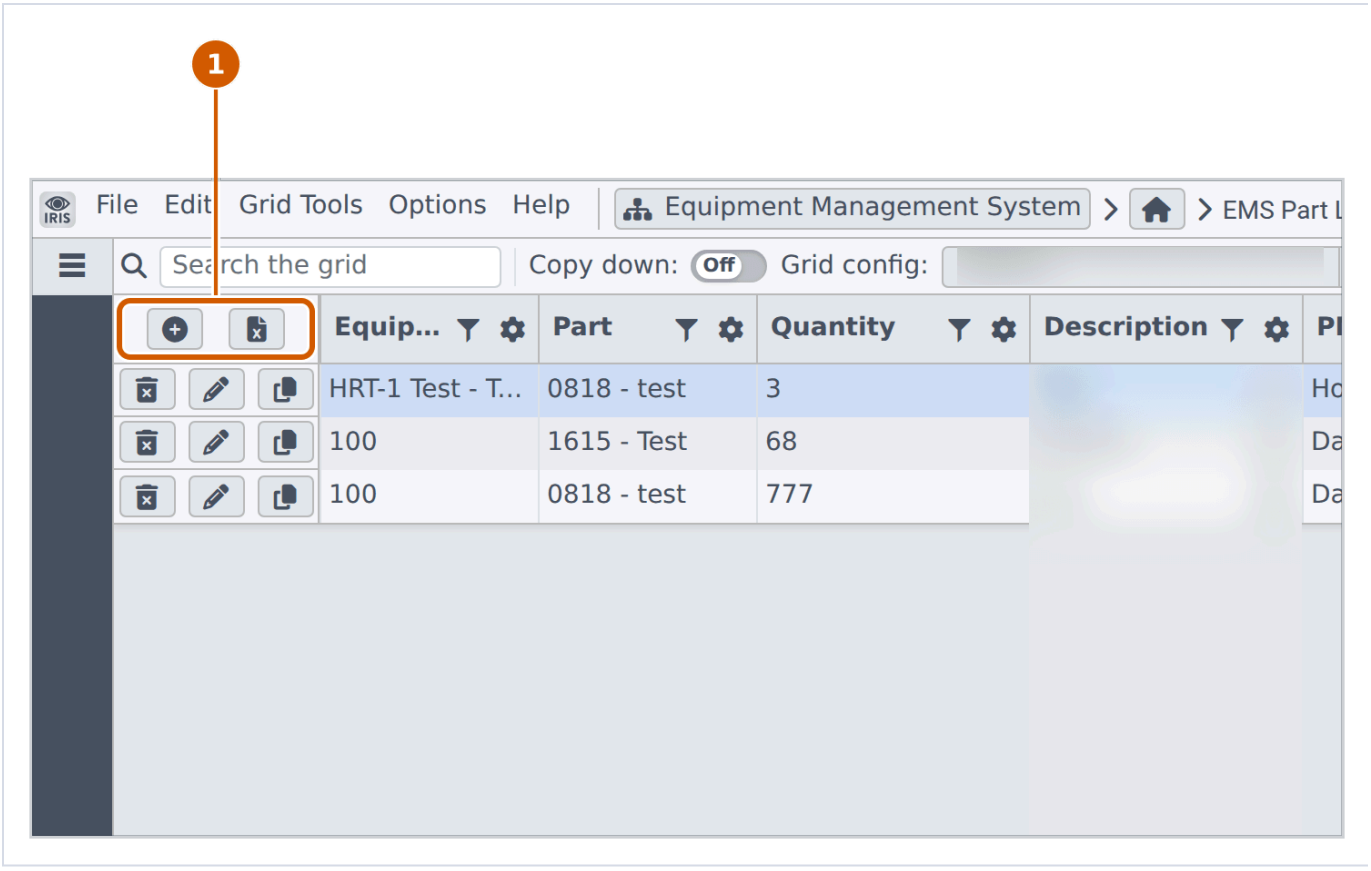
Policy, Policy List, Part and Part List are ordinary grids opened from the Equipment screen's tab buttons. View, filter and edit them as described in Grid viewing and editing.



The Policy grid lists maintenance policies with their PM method, frequency and warnings.

1. Grid column headings

The Policy grid has these columns: Name, Description, PM Method, PM Frequency, PM Due Warning Miles, PM Due Warning Hours, PM Due Warning Days, Active, Created Date, Created By, Last Updated Date, Updated By, Notes and Documents.



The Part List grid shows the parts assigned to equipment.

1. Grid column headings

The Part List grid has these columns: Equipment, Part, Quantity, Description, PM Method, Created Date, Created By, Last Updated Date, Updated By, Notes and Documents.

Messages you may see

MESSAGE	WHEN	WHAT TO DO
Select an equipment record first.	A tab button was clicked with no equipment row selected	Select a row in the Equipment grid, then click the button again
Please enter a valid date.	The depreciation date is not a date	Choose a date from the date picker
Depreciation was recalculated for N equipment record(s).	Calculation finished	Review the Depreciation columns in the reloaded grid
The equipment depreciation could not be calculated. IRIS Support has been notified.	Calculation failed (a more specific message may appear instead)	Read the message; contact your administrator if it continues
Unable to calculate depreciation due to a technical error. An email has been sent to support.	A technical error stopped the calculation	Try again later or contact support

MESSAGE	WHEN	WHAT TO DO
Please select a piece of equipment from the equipment dropdown list before attempting to assign all policies.	Assign all clicked with no equipment chosen	Choose equipment in **Equipment list:**
Please select a piece of equipment from the equipment dropdown list before attempting to unassign all policies.	Unassign all clicked with no equipment chosen	Choose equipment in **Equipment list:**
There are no unassigned policies to assign to the selected equipment item.	Assign one clicked when every policy is already assigned	No action needed
Please select a policy from the unassigned policies list to assign it to the current equipment item.	Assign one clicked with no policy selected	Select a policy in the left list first
There are no assigned policies to unassign from the selected equipment item.	Unassign one clicked when nothing is assigned	No action needed
Please select a policy from the assigned policies list to unassign it from the current equipment item.	Unassign one clicked with no policy selected	Select a policy in the right list first
Unable to assign all the policies for the selected equipment item.	Assign all failed	Try again; contact your administrator if it continues

Tips and notes

Important: Before it recalculates, IRIS10 sets depreciation to 0 on every equipment record. Equipment that no longer meets its method's criteria (for example, missing cost, life, purchase date or reading) ends with 0 rather than an old value.

Note: The count in "Depreciation was recalculated for N equipment record(s)." includes only equipment that met its method's criteria, not all equipment.

Note: For Years-based equipment, the current-year depreciation uses a fiscal year from July 1 to June 30.

Note: When your county uses Cost Accounting hours for depreciation, only equipment depreciated by Hours has its last hours reading refreshed from Cost Accounting first. See Cost Accounting screen tools.

Note: IRIS10 remembers the date of the most recent depreciation calculation.

Tip: Assign all skips inactive policies (or inactive equipment on the policy-to-equipment screen) and anything already assigned, so it is safe to use after adding a new policy or piece of equipment.

> **Note:** Removed policy assignments are kept in the audit history.

> **Tip:** The tab buttons in the **Equipment Information:** panel (for example **Edit Last PM**, **Assign Parts**, maintenance history, costs and work order) open the related screen in a new browser tab, filtered to the selected equipment. **Assign Policies** opens a window instead. The chevron button ("Close the equipment information panel.") collapses and expands the panel. For maintenance history, see Equipment maintenance history.

> **Important:** Before it opens, the **Edit Meter Reading History** tab button warns: "If you edit or delete the most recent equipment reading, check the readings on the Equipment screen and the Edit Last PM screen so the PM reports stay correct."

Related topics

- Grid viewing and editing
- Data grid overview and basics
- Security Administration: access levels by user
- Reading updates
- Cost Accounting screen tools
- Units of measure, fiscal years and organizations
- Equipment maintenance history