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

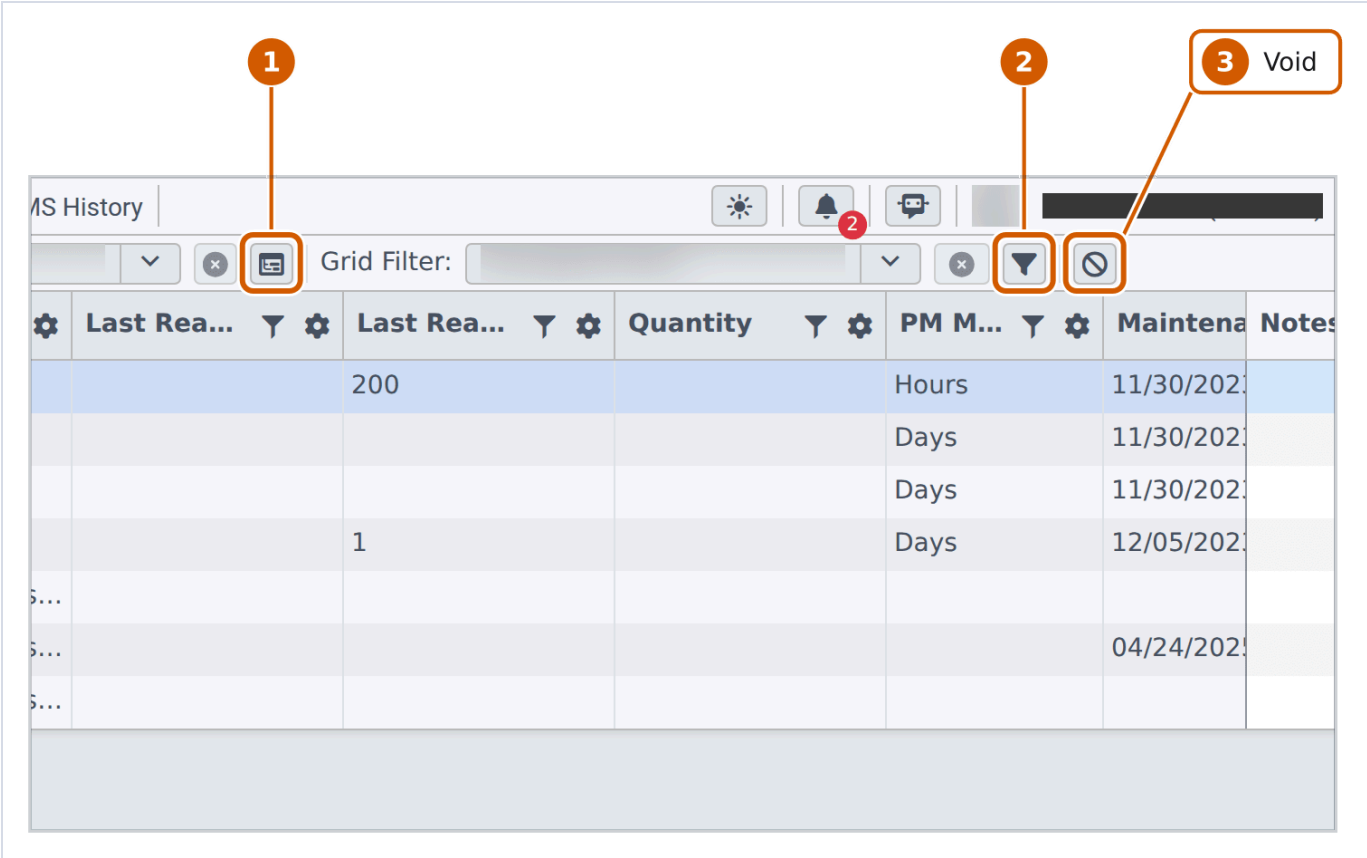
- Sign in to IRIS10.
- Make sure you have access to the Equipment Management screens.
- To void a record, you need security level 4 on the **Maintenance History** screen. See Security Administration: access levels by user.

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.

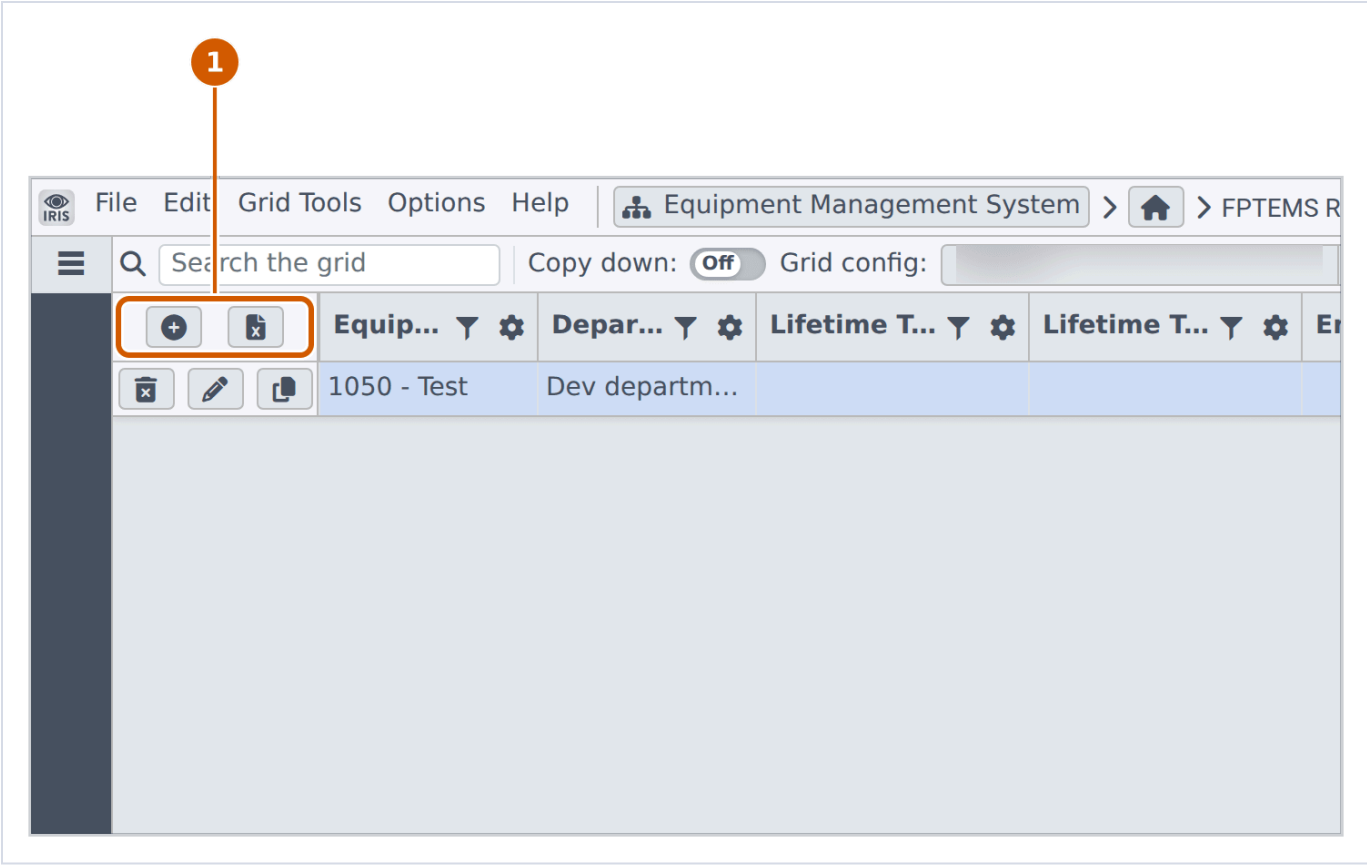
   If the void works, the grid refreshes and `The void completed successfully.` appears. If the void is refused for a validation reason, the reason is shown. If the void fails for any other reason, `An error occurred during the void. An email has been sent to support.` appears.

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.



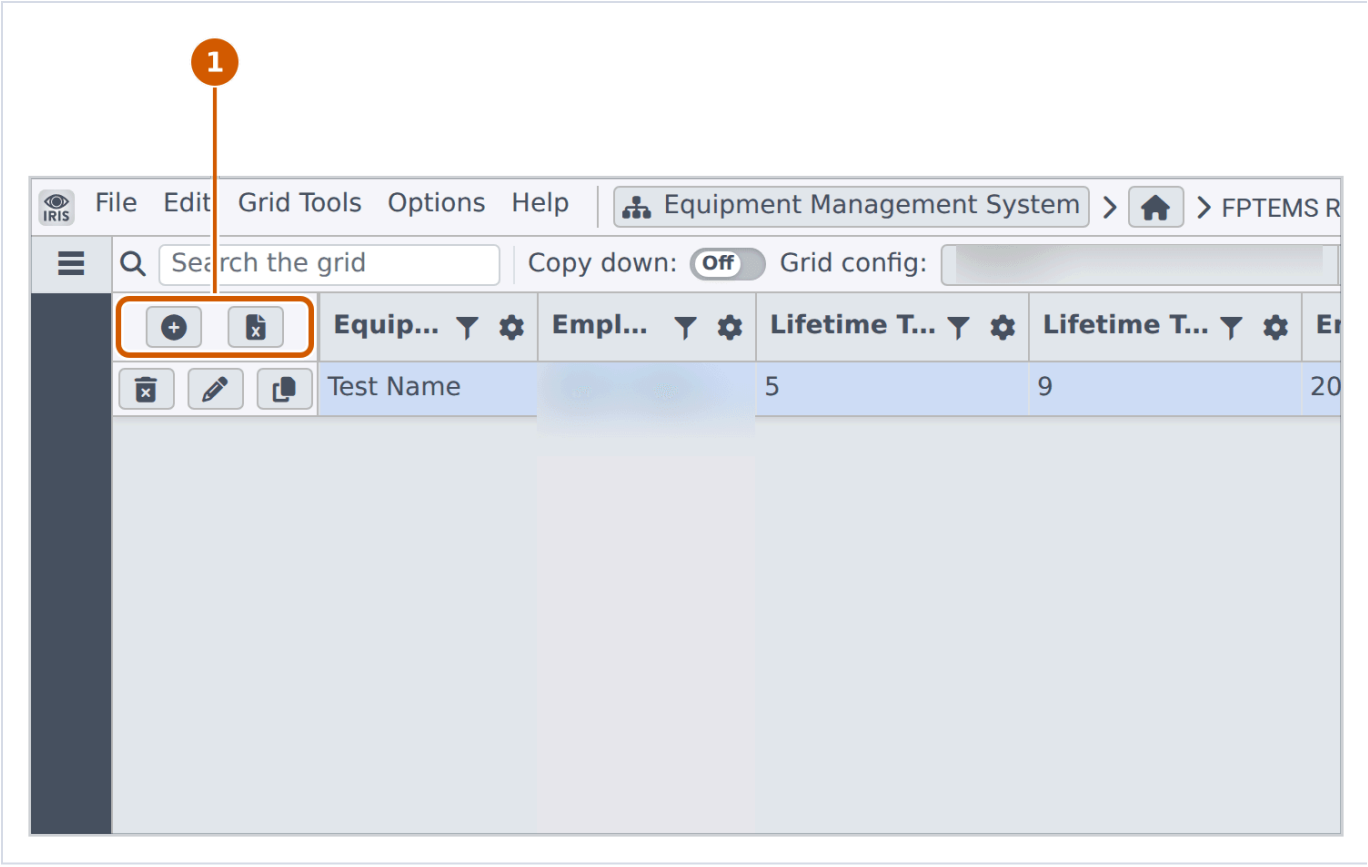
The read-only Related Department History screen.

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.



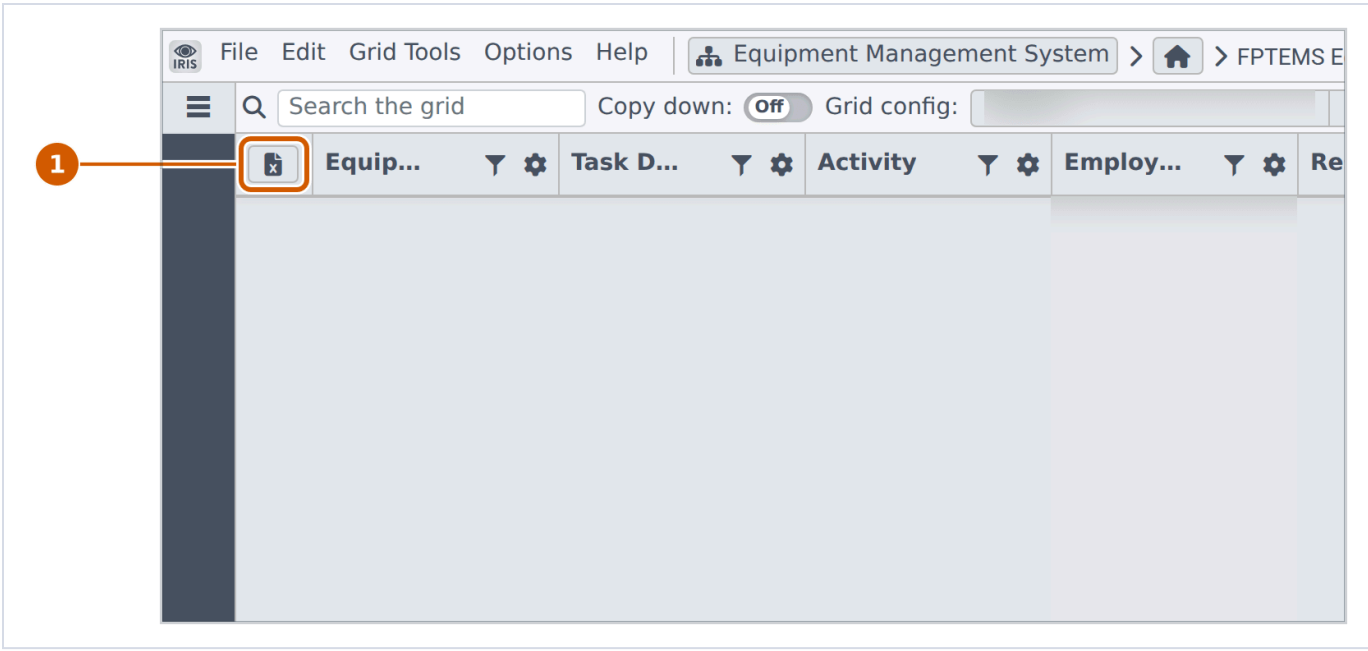
The read-only Related Employee History screen.

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