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.

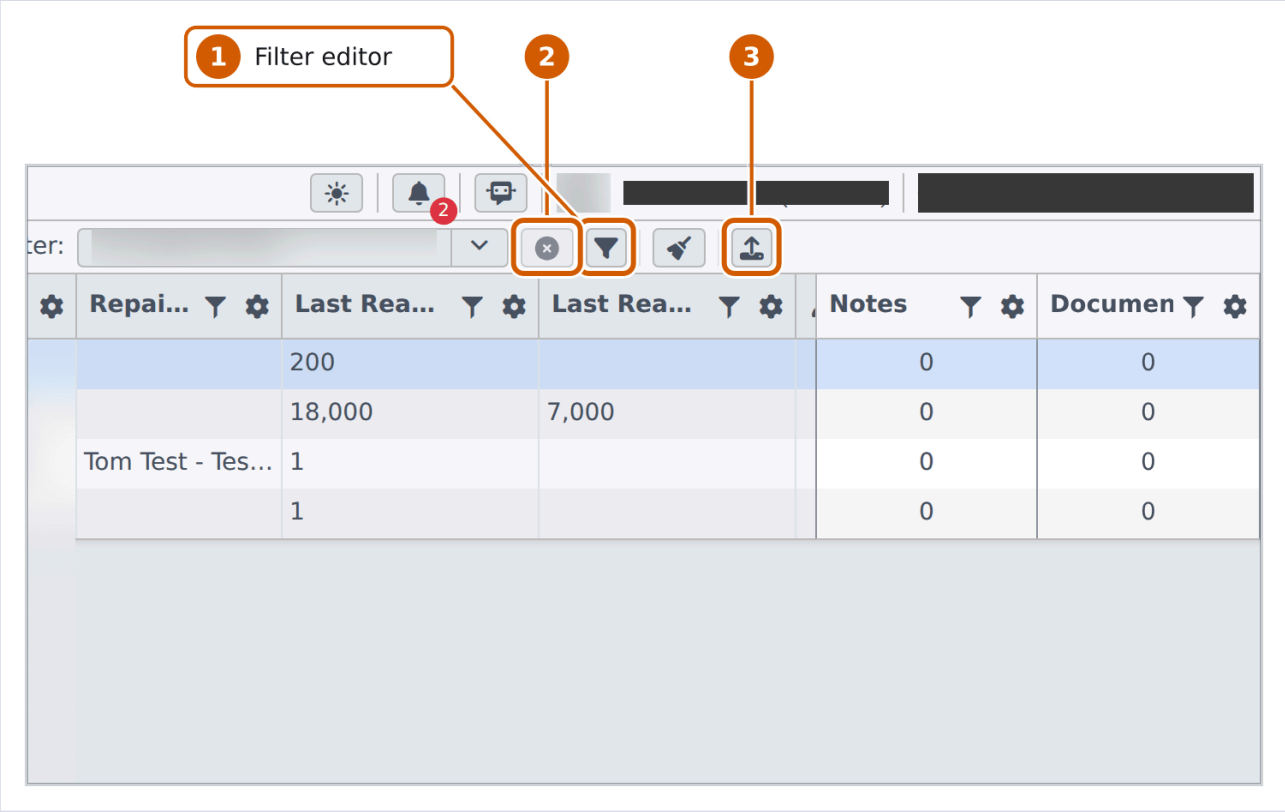
    The entry appears in the Maintenance Entry grid and waits there until it is posted.

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**.



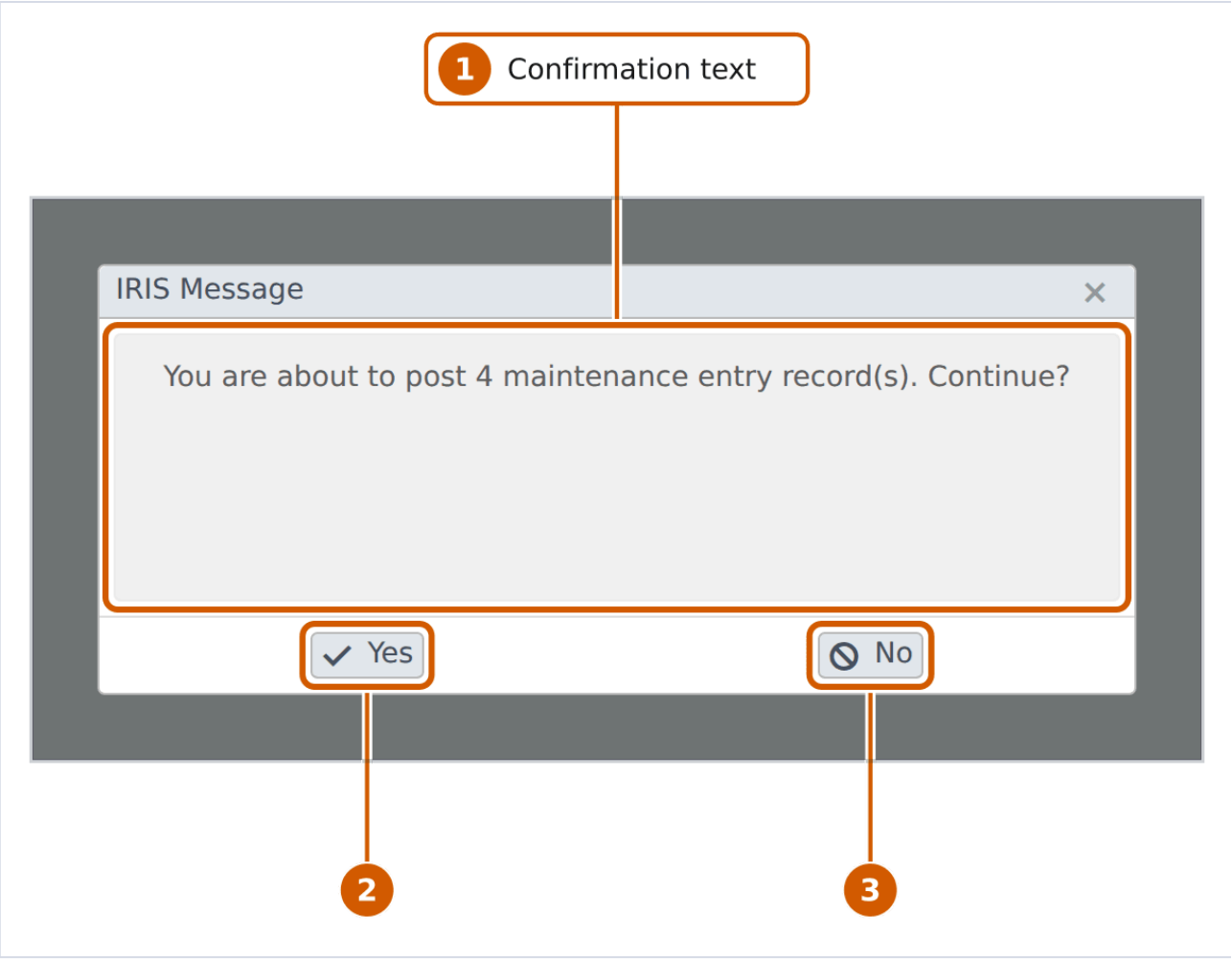
The Maintenance Entry screen. Use Filter editor to choose which entries to post, then Post maintenance entry records.

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