Helm CONNECT

Support Article

Rev 1

Version 1.17: Improved visibility about when maintenance is due

An important goal of Maintenance by Metric is improving visibility about when maintenance is due for your assets. Since you can now schedule maintenance checklists by using a calendar date/frequency, one or more cumulative reading types, or both, we updated the interface in Version 1.17 to reflect these changes. This article shows you all the places where you can now see more detailed information about cumulative readings types, values, frequency, and due dates in both in-progress and completed checklists.

Onboard Logs

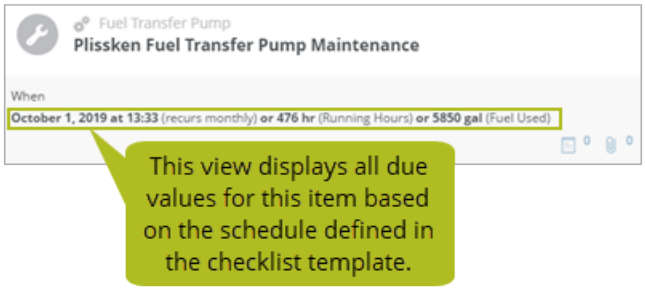
In your work spaces in Onboard > Logs, you can now see all your cumulative reading types and when your maintenance checklists are due.

Card view

We made the following changes in the card view:

- All schedule methods defined for a maintenance checklist are displayed, regardless of which one is closest to being due or overdue.
- The cards are sorted according to which one is/was due first, based on the template

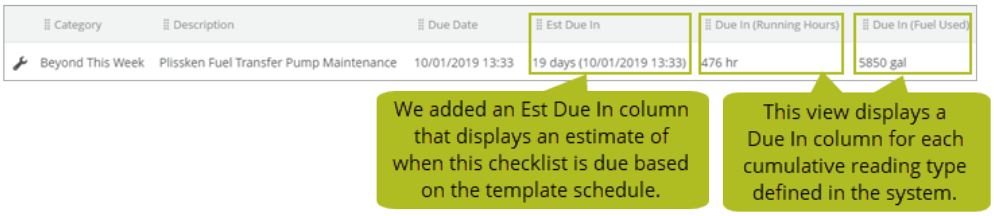
schedule.



List view

We made the following changes in the list view:

- We added a Due In column for each cumulative reading type in the checklist's template schedule.
- We added an Est Due In column that uses the template schedule to estimate when the checklist will be due.
- The list items are sorted in the same way as the card view; items are organized by which one is/was due first.
- We changed the default column display order so the new Due In columns are grouped together. Of course, you can still show and hide columns or rearrange the column layout, just as you could before.

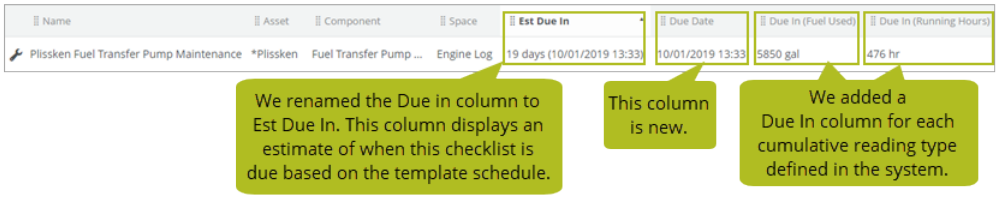


Onboard Overview

We made the following changes to the Onboard > Overview > To Do tab:

- We renamed the Due in column to Est Due In. This column displays an estimate of when that maintenance checklist will be due based on the template schedule.

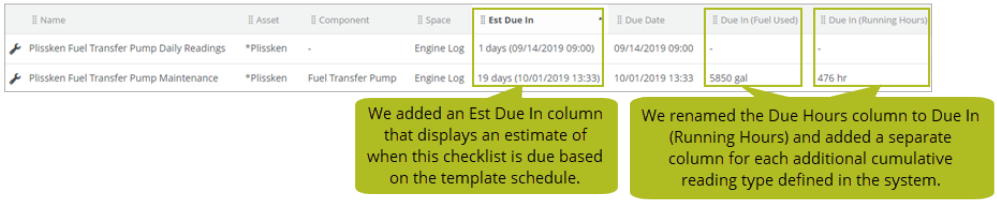
- We added a Due Date column as well as "Due In" columns for each cumulative reading type.



Advanced Search

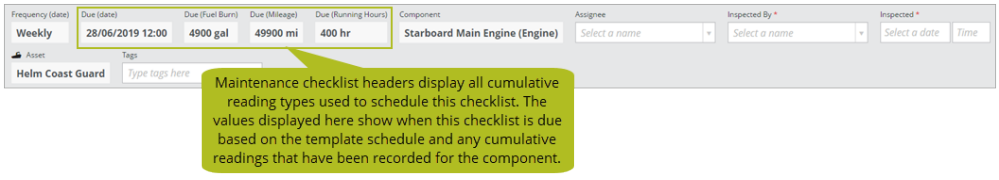
We made the following changes to the Maintenance > Overview > Advanced Search tab:

- We renamed the Due Hours column to Due In (Running Hours).
- We added a separate column for each additional cumulative reading type in the system.
- We added an Est Due In column that displays an estimate of when a maintenance checklist will be due based on the template schedule.



Maintenance checklists

The headers in maintenance checklists scheduled based on cumulative reading types now display all of the reading types used in the schedule, and the values displayed show when the checklist is due based on the schedule and any cumulative readings that have been recorded for the component.



More about cumulative readings

The following applies to all views for active checklists where cumulative reading types are displayed:

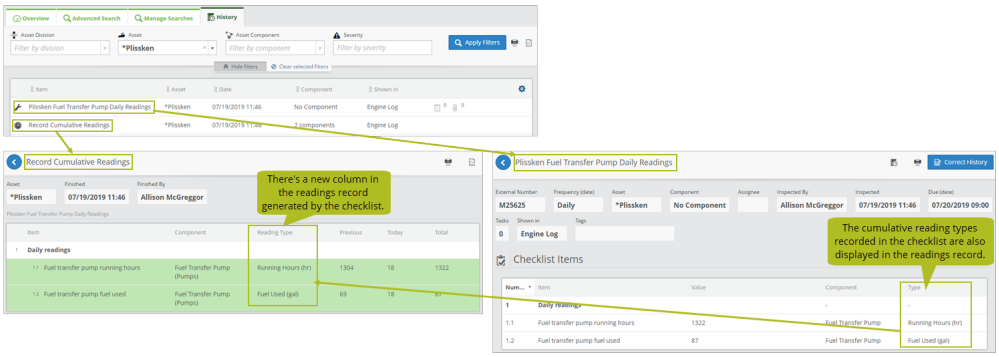
- As in previous versions, the values in the cumulative reading type due fields or columns count down towards zero, which is when they become due.
- When a checklist is past due, the overdue value will be displayed in red.
- If there's an Overdue filter available, the filter considers all schedules defined in the template when determining if it's overdue.

Cumulative readings in history

In Version 1.17, you'll see some additional information in history for maintenance checklists that use cumulative reading types.

Checklists used to *record* cumulative readings

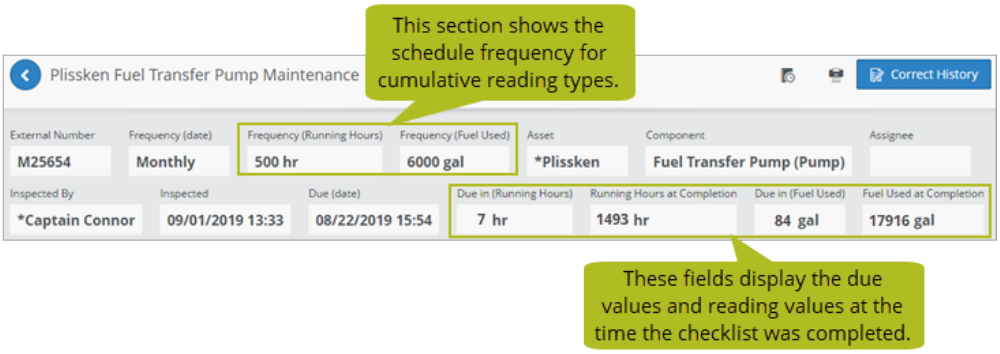
In history, maintenance checklists used to record cumulative readings for components now display all cumulative reading types in the Types column, and the Record Cumulative Readings record generated by the completed checklist has a new Reading Type column.



Checklists that are *scheduled* based on cumulative readings

Maintenance checklists that are scheduled based on cumulative reading targets now display additional information in history:

- There's a Frequency field in the header for each cumulative reading type used in the template schedule.
- There's a Due in (reading type) field and a [Reading Type] at Completion field for each cumulative reading type used in the template schedule.



More about cumulative reading checklists in history

Using Correct History to change a cumulative reading entry won't change the current reading value for that component, just the checklist response. This isn't new. If you need to correct a cumulative reading value, submit a new checklist with no period and the correct total value filled in the cumulative reading field. For more information, see the *Initialize cumulative reading values and set due values* article.

Reports

We made changes to the Components, Maintenance Templates, and Maintenance Checklists reports to accommodate the new cumulative reading types and values. For more information, see the *Updates to the Components, Maintenance Templates, and Maintenance Checklists reports* article.

More about Maintenance by Metric

To learn more about how to set up and use cumulative reading types, see the *How to use Maintenance by Metric* article.