Duplicate maintenance templates to stream-line implementation

As a Helm CONNECT Maintenance customer, after you add your assets and components, you'll typically build a set of maintenance templates to manage and track your maintenance tasks. To do this efficiently, we recommend you build and publish a complete set of main-tenance templates for one asset, then duplicate and edit them for your other assets. A set of maintenance templates generally includes the following:

- One or more templates for checklists used to record important cumulative readings for components on that asset, such as running hours, fuel used, or lube oil

- One or more planned maintenance routine templates that can be scheduled by cal-endar date, cumulative reading value, or both

Before you start duplicating your maintenance templates, however, there are some steps you can take to make this process smoother. For each asset you'll be creating templates for, gather the following information:

- Current values for each component you'll record readings for, such as running hours, fuel used, etc.

- When each type of service is next due for each component

We recommend that you get the asset's component information just before you want to cre-ate and publish the templates to that asset so it's as accurate as possible and you won't have to go back and update the templates again later.

Duplicate and edit the templates used to record cumulative readings

The first step is to duplicate the template(s) you built to record cumulative readings for components on your asset.

To duplicate and edit templates used to record cumulative readings

1. Go to the **Setup** > **Templates** > **Maintenance** tab.

2. From the **Asset** filter, select the asset that has the set of templates you want to duplicate.

   > **Note**
   >
   > This will help ensure that you don't miss a template or include one you don't need.

3. In the list of templates, click the first one that you want to duplicate.

4. Above the header, click **Duplicate**.

5. Remove **- Duplicate** from the template name. Make any other name changes required.

   > **Tip**
   >
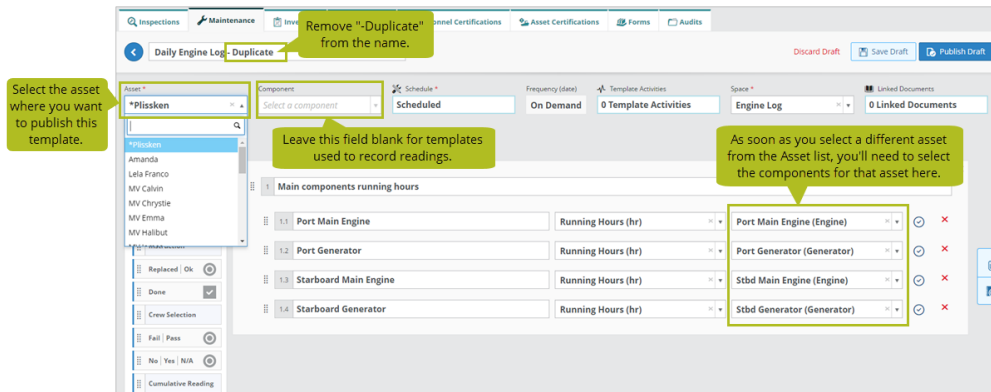   > If you include the asset name in the template name, it'll make it easier to find.

6. From the **Asset** list in the header, select the asset you want to use this template for.

7. Leave the **Component** field empty.

8. In the body of the template, select the components you want your crew to record readings for.

Note

You'll need to select components for each duplicate template because each one will apply to a different asset's components.

9. Click **Publish Draft**.

10. Repeat the steps above to duplicate and publish all templates for the new asset that will be used to record readings.

Note

Don't duplicate the planned maintenance routine templates yet; you'll do that later.

Complete the new checklist to record cumulative readings

When you first build components for your assets, Helm CONNECT assumes the cumulative reading values start at zero. Since this value is unlikely to be zero, you must enter the correct value the first time you complete the checklist used to record cumulative readings for a component. This also applies when you duplicate templates for use by a different asset, since the template references different components.

To complete the new checklist

1. Go to **Onboard** > **Logs** and select the space where the checklist displays.

2. Make sure the correct asset is selected in the **Asset** filter near the top of the tab.

3. In the **To Do** list, click the checklist to open it, then complete all the required fields.

4. Click **Finish Now**. This will add the current cumulative reading values into Helm CONNECT.

Note

The first time you complete a checklist where you record cumulative readings for a component, enter the values in the **Total** field and not the Add field.

When entering cumulative reading values for the first time, use the **Total** fields.

Duplicate and edit the planned maintenance routine templates

When you duplicate templates used for planned maintenance routines, you'll need to make a few adjustments. We recommend you complete the steps below only when you are ready to publish the templates to the asset.

To duplicate and edit planned maintenance routine templates

1. Go to the **Setup** > **Templates** > **Maintenance** tab.

2. From the **Asset** filter, select the asset that has the set of templates you want to duplicate.

   > **Note**
   >
   > This will help ensure that you don't miss a template or include one you don't need.

3. In the list of templates, click the first planned maintenance routine template that you want to duplicate.

4. Above the header, click **Duplicate**.

5. Remove **- Duplicate** from the template name. Make any other name changes required.

   > **Tip**
   >
   > If you include the asset name in the template name, it'll make it easier to find.

6. From the **Asset** list in the header, select the asset you want to use this template for.

7. From the **Component** list, select the asset component that you want your crew to perform the maintenance on.

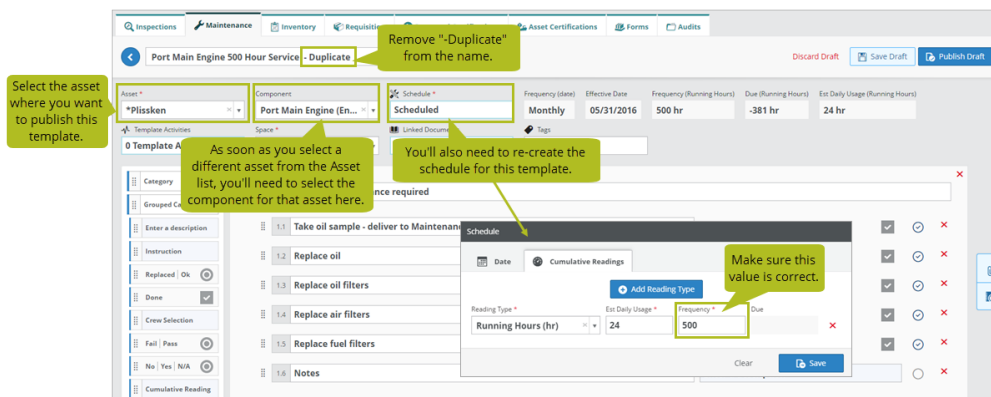8. Click **Schedule**, and re-create the schedule for this template.

📝 **Notes**

- You'll need to re-create the Cumulative Readings schedule for each planned maintenance routine template you duplicate.

- For Cumulative Readings schedules, check that the **Frequency** field is correct for this template.

💡 **Tip**

For clarity, we recommend that the template name include the frequency values. For example, if you have a 500 Hour Service, a 750 Hour Service, and a 1000 Hour Service template for an asset component, it's easier to tell them apart if the frequency is in the name.

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9. Make any other changes required to the template for this asset.

10. Click **Publish Draft**.

11. Immediately after you publish the template, click each **Due** field in the header and adjust the values to reflect when the next service is actually due for this asset component. *You don't need to click Edit to do this.*

![Example icon] **Example**

If you entered running hours of 825 in the checklist in Onboard > Logs earlier, the system will calculate that a 500 hour template is overdue by 325 hours, but it's actually due at the next interval, which is 175 hours.

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12. Repeat the steps above to duplicate and publish all planned maintenance routine templates required for the new asset.