

# APPENDIX B: ASSET SCHEDULER

## DESCRIPTION

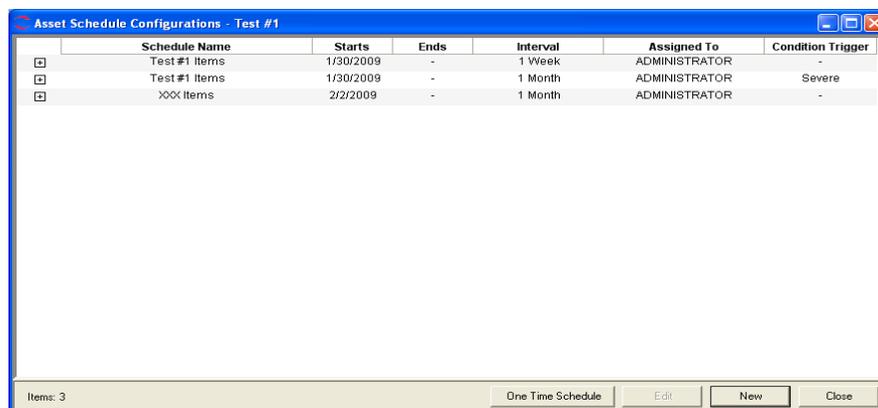
The Asset Scheduler Module allows an asset to be set up for regularly scheduled testing. When an asset is scheduled for regular testing a message is generated in the Schedules section of the Message Center.

## PROCEDURE

### To create a reoccurring schedule

1. Highlight the asset on the Site Navigator, WatchList, or Asset Condition list reached through the Site Condition.
2. Select the Scheduler icon  on the toolbar.
3. The Asset Schedule Configurations window opens. The asset name displays on the title bar. The window will be blank if no test schedule has been set up for the asset. If a test schedule has been set up, it will contain a line for each different schedule.

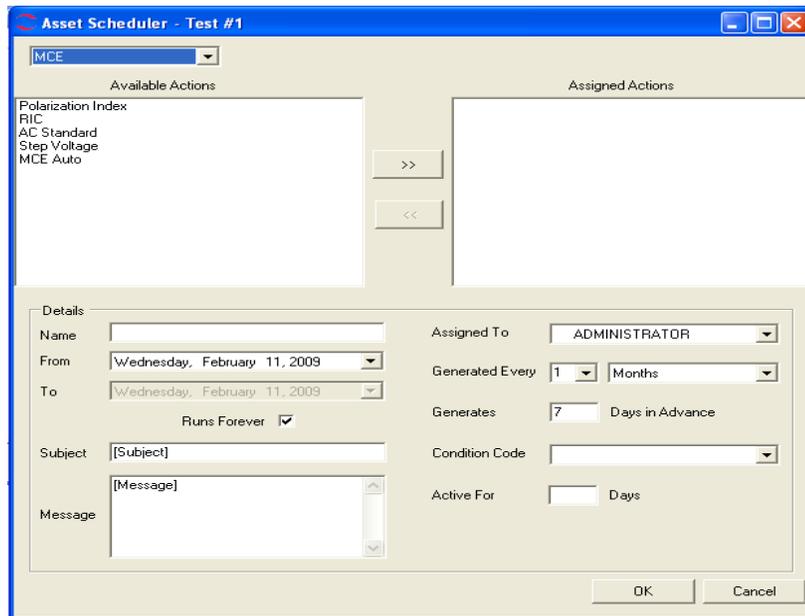
Note: If you do not have the correct Module Activation Key a message box will remind you that the Scheduler is not accessible under the current key. Contact PdMA Corporation Sales Department at pdma@pdma.com or 813-621-6463.



4. Click **New**.

Note: To create a non-reoccurring schedule (One Time Schedule) see Schedule, Create in the To View Scheduled Jobs section for instructions.

5. A second Asset Scheduler window opens.



#### Reoccurring Asset Schedule

6. Select either MCE or EMAX from the drop-down list. The appropriate tests are displayed in the Available Actions window.
7. Select the tests to be scheduled by highlighting the test name and clicking the right pointing arrow button (>>) to move the selection into the Assigned Actions box. Continue until all desired tests are selected. MCE and EMAX test may be scheduled together.

To remove a test from the Assigned Actions box, highlight it and use the left pointing arrow (<<) button.

8. Enter a schedule name (required) in the Name text box.
9. The From text box is the starting date for the scheduled testing. Clicking the down arrow causes a calendar to display with the current date circled in red. Clicking a future date on the calendar highlights the date in blue and inserts the date in the text box.
10. If the Runs Forever box is checked (default) the To text box is inactive and the tests will be scheduled according to the selections made on the right side of the Details area with no end date for the scheduling.
11. If the Runs Forever box is unchecked a To selection indicates the end date of the reoccurring schedule. Select an end date by clicking the down arrow, which causes a calendar to display with the current date circled in red. Clicking a future date on the calendar highlights the date in blue and inserts the To date in the text box.
12. If desired enter a message in the Message area.

13. Assign the schedule to a technician by selecting a name from the list in the Assigned To text box.

Stand Alone users will only see the name Administrator in the text box.

Network users will see a drop down list of users who have rights to the site.

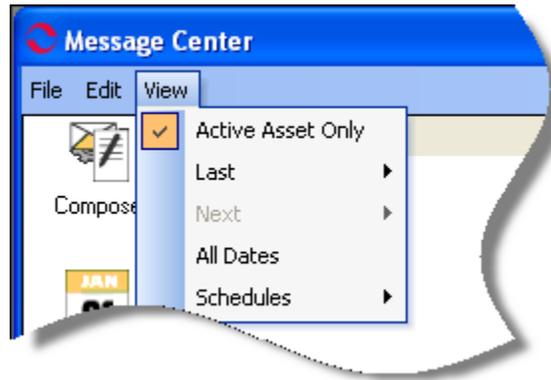
14. The frequency that the schedule is generated is controlled by the Generated Every list boxes. Use the down arrow to select a number between 1 and 12. Your selection works with the selection made in the To and From list boxes on the left. Use the down arrow and select either Days, Weeks, Months, or Years.

15. Enter a number in the Generates text box to tell the software how many days in advance to generate the schedule.

16. To schedule testing when an asset reaches a specific condition assign a Condition Code using the drop down list. Choices are blank (none), Normal, Observe, Caution, Severe, or Any Severity Increase. Blank (none) is the default until a selection is made.
17. Enter a number in the Active For text box to indicate how many days the schedule will be active for from the first day of the condition code change. This text box is inactive until a selection is made in the Condition Code text box.
18. When your choices are complete, click **OK**.

## To view scheduled jobs

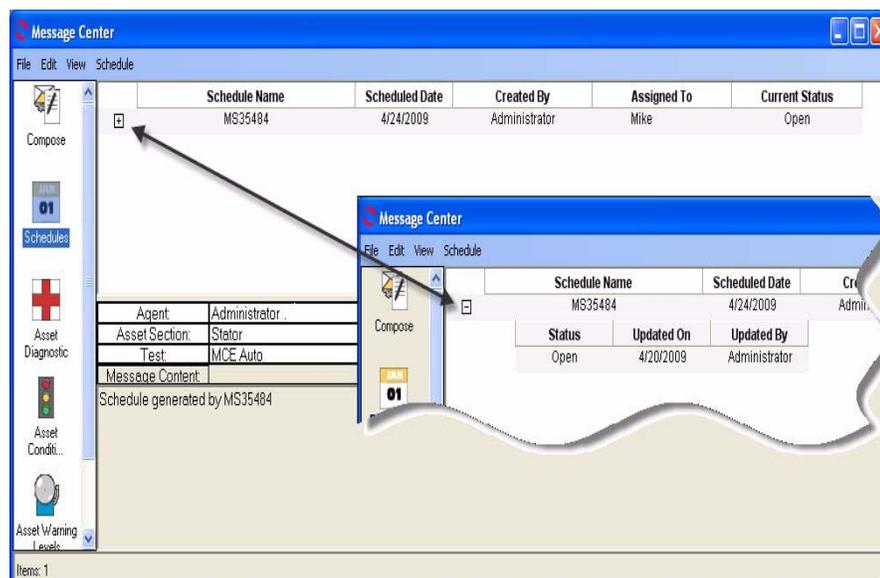
In the Message Center, the list of scheduled jobs can be displayed for either the single highlighted asset or for all assets. The default is to view schedules for a single highlighted asset (Active Asset Only). To view schedules for all assets, remove the check mark in front of Active Asset Only (View, Active Asset Only).



1. In the Message Center, click the Schedules icon.  This causes the Schedule menu to appear and list the schedules for the selected asset.

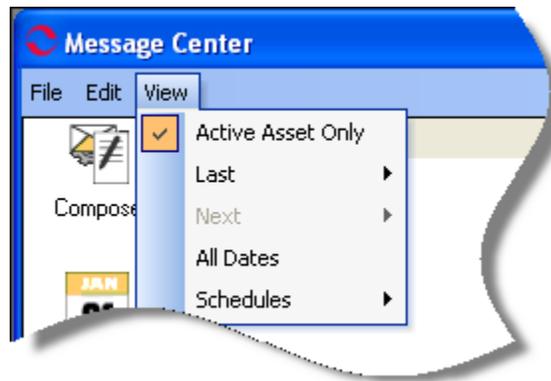
Note: If View, Active Asset Only is selected and an asset is highlighted the testing schedule will appear for that asset only. If no asset is selected, a message informs you to select an active asset.

2. To view additional information about the schedule, click the + sign at the beginning of the line. The expanded view displays the Status, Updated On, and Updated by information. To close the expanded view click the - sign.

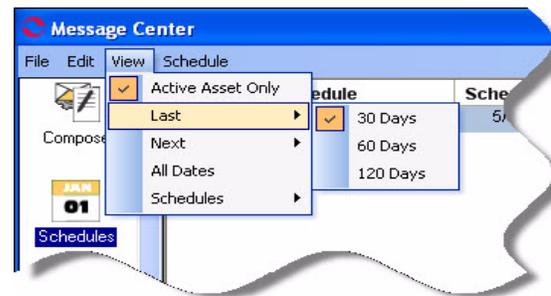


## View Menu

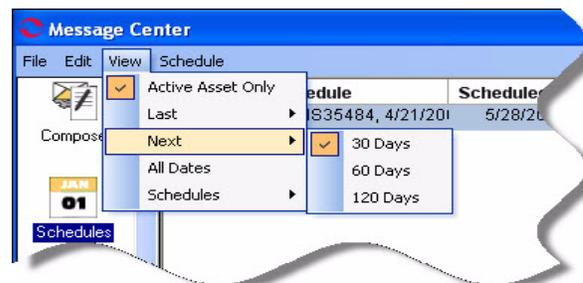
*View, Active Asset Only* - As previously mentioned a check mark in front of Active Asset Only causes the schedule for the highlighted asset to display. This is the default value. If the checkmark is removed then a list of all asset having schedules displays.



*View, Last* - This option allows you to select a prior time frame of 30, 60, or 120 days to display a list of schedules.

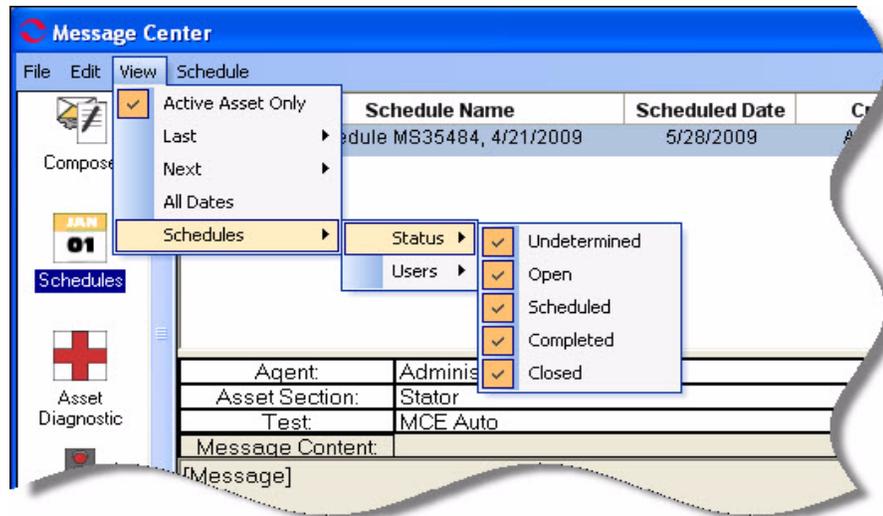


*View, Next* - The Next option is not active until a list has been generated. Then using the Next option and selecting either 30, 60, or 120 days will generate a list of schedules during that time frame.

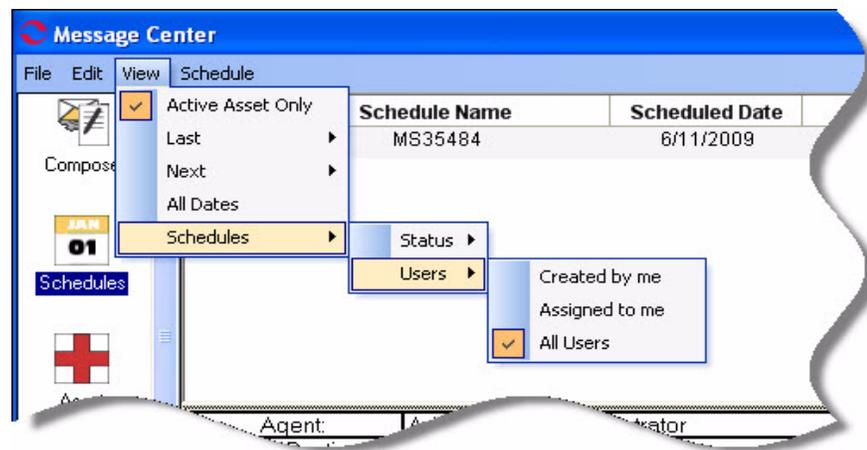


*View, All Dates* - The All Dates option causes all schedules that have been generated to display.

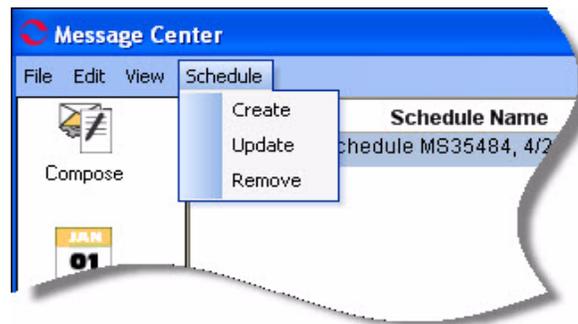
*View, Schedules, Status-* Using the Status selections allows the schedule list to be refined. The default is to show all status categories. Deselecting (removing the check mark from in front of a option) removes a list meeting that criteria from the schedules list. Each time a check mark is deselected the list regenerates.



*View, Schedules, Users -* Using the Users selections allows the schedule list to be refined. The default is to show all users. Deselecting (removing the check mark from in front of a option) removes a list meeting that criteria from the schedules list. Each time a check mark is deselected the list regenerates. You cannot deselect All Users without selecting either Created by me or Assigned to me. If All Users is selected the Created by me and Assigned to me are deselected. You may have Created by me and Assigned to me selected at the same time, but not all three options.

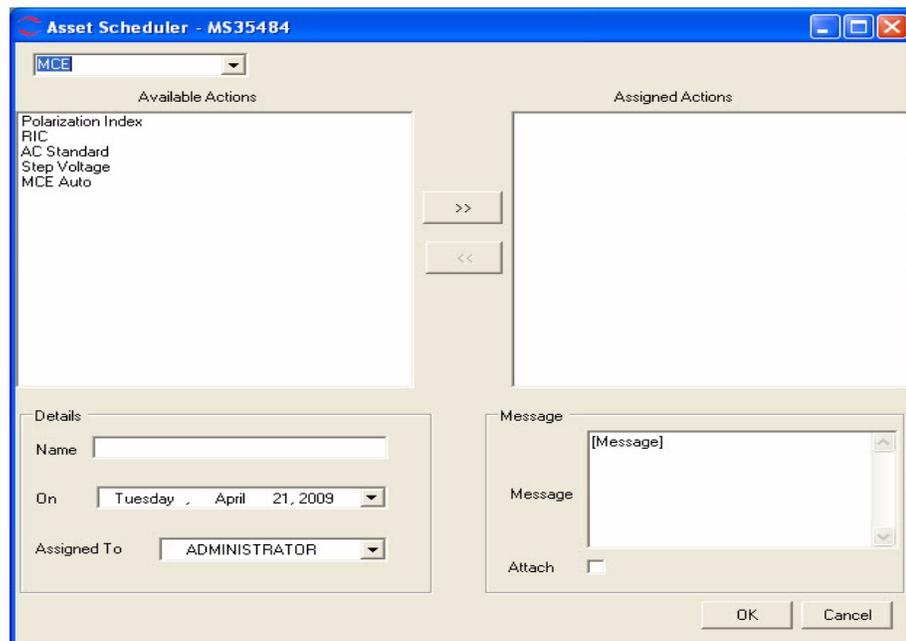


## Schedule Menu



*Schedule, Create* - This option is used to create a one time schedule. An asset must be selected. Selecting Schedule, Create opens the Asset Scheduler window. It is also accessible by right clicking on an existing schedule or selecting Schedule on the tool bar and clicking the One Time Schedule button on the Asset Schedule Configuration window.

Note: To create a reoccurring schedule it is necessary to use the Asset Schedule Configuration window reached by clicking the icon on the toolbar. Click the New button.



### One-Time Schedule

#### Create a one-time schedule

1. In the Asset Scheduler window, select either MCE or EMAX from the drop-down list. The appropriate tests are displayed in the Available Actions window.

2. Select the tests to be scheduled by highlighting the test name and clicking the right pointing arrow button (>>) to move the selection into the Assigned Actions box. Continue until all desired tests are selected. MCE and EMAX test may be scheduled together.

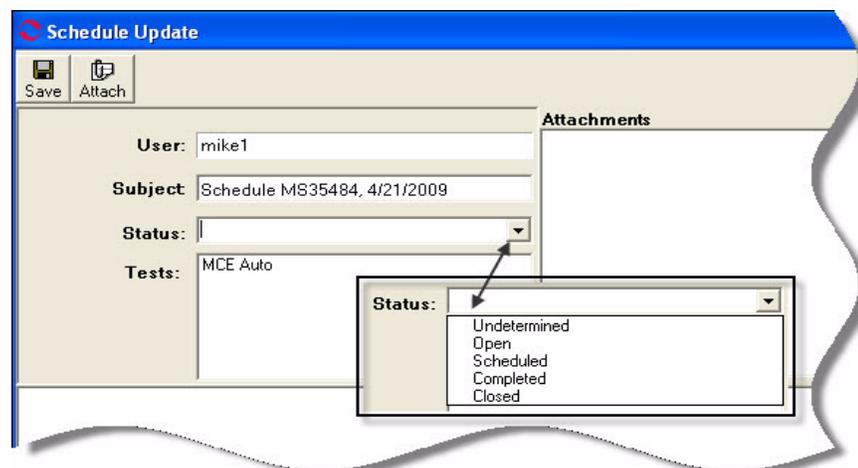
To remove a test from the Assigned Actions box, highlight it and use the left pointing arrow (<<) button.

3. In the Details section fill in the Name, use the drop down calendar to select a test date and fill in the assigned to text box.
4. In the Message section enter a message if desired.
5. You may attach a file to the schedule by clicking on the Attach check box. When you click **OK** the File Attachment window opens, allowing you to search for the file you wish to attach. Locate the file, highlight it so that the name shows in the File name text box, then click **Open**. The file will be attached to this schedule.

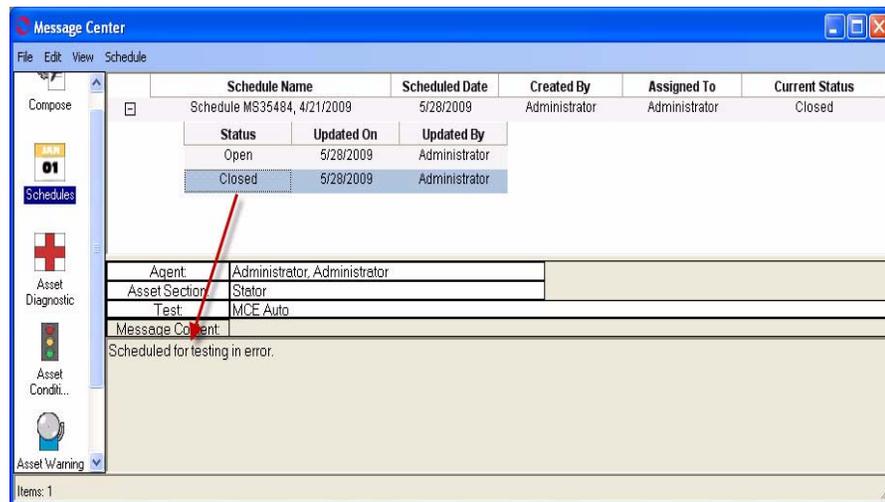
Note: The file name is limited to less than 50 characters, including the extension.

To view the file highlight the schedule line in the Message Center. Do not click the + sign. The Attachment File text box displays in the lower area of the window. Click the down arrow to display attached files and click on the desired file name. The Open or Save file window opens giving you the choice to either open or save the file to a disk. Make your selection and click **OK**.

*Schedule, Update* - This option allows you to change the status of the scheduled testing. The Schedule Update window opens. Using the drop down list to change the Status to Undetermined, Open, Scheduled, Completed, or Closed. A message must be entered. Click **Save**. The status will be updated and the note will display in the Message Center.



To view the message that was associated with the update, click the + sign in front of the schedule, then highlight the changed status. The message appears in the Message Content area at the bottom of the window.



*Schedule, Remove* - Highlight the schedule line and select Schedule, Remove. The schedule is permanently deleted.