

Maintenance

TennaU April 2024



Meet the Team



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Meet our Support Team!
Available M-F 8am-8pm EST



Tyler



Katie



Ron



Tom

Agenda

How to Set Up Preventative Maintenance

- Creating Services
- Creating a Package

Maintenance Requests and Work Orders

- How to view
- Resolve
- Assign
- Generate a Work Order

Mobile

- Maintenance Entries
- Maintenance Requests
- Work Orders

Poll

Who is joining us today?

How to Set Up Preventative Maintenance

Preventative Maintenance

Creating Services

A service is an individual routine maintenance activity (such as oil changes or tire rotations) with customized and pre-configured triggers and reminders. Services are added to Preventative Maintenance Services and then applied to assets.

Creating Services

- Identify service based on usage or time
- Select frequency
- Include inspections (optional)
- Set reminders

Creating a Package

A PM Service Package is a group of one or more Services that is applied to individual assets or all assets in a particular category.

- Allocate service to a package
- Select the assets you would like to assign to the package
- Insert Inspection (optional)
- Adjust the next service due

Maintenance Requests & Work Orders

Maintenance Requests & Work Orders

Maintenance Requests

- View
- Assign
- Resolve
- Generate Work Order

Work Orders

- Best Practice for Creation
- Assign to mechanics
- Additional Capabilities

Tenna Mobile App



Mobile App Maintenance Overview

Maintenance Entries

- Asset Details / Maintenance

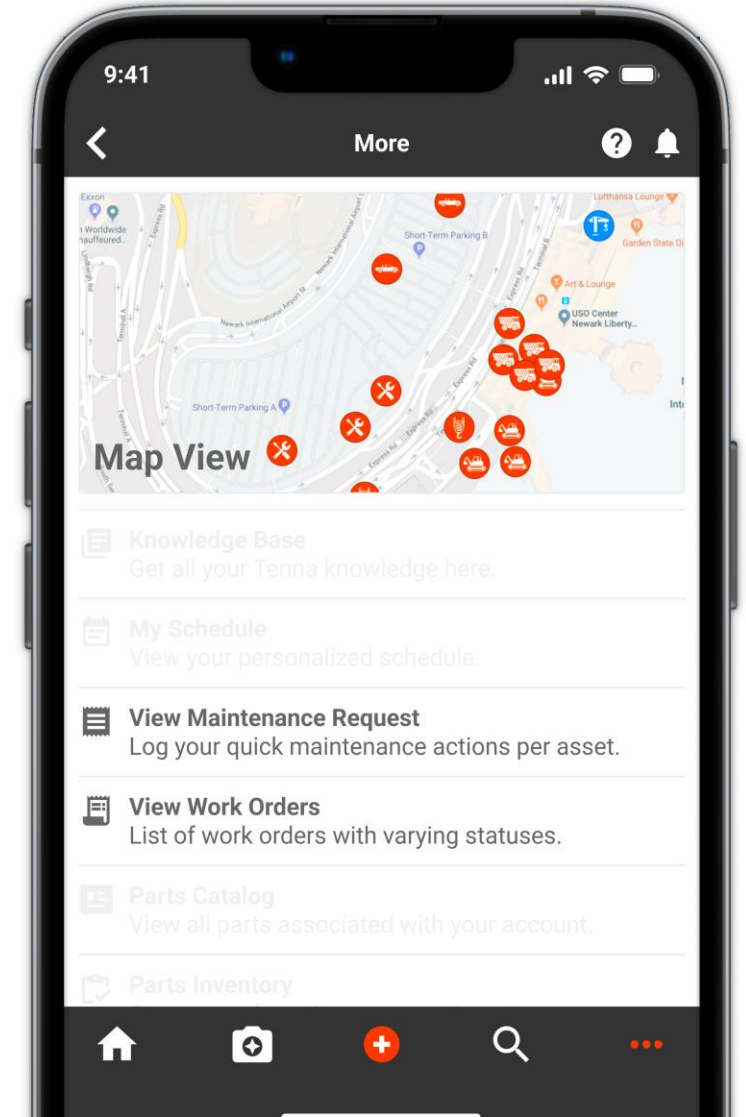
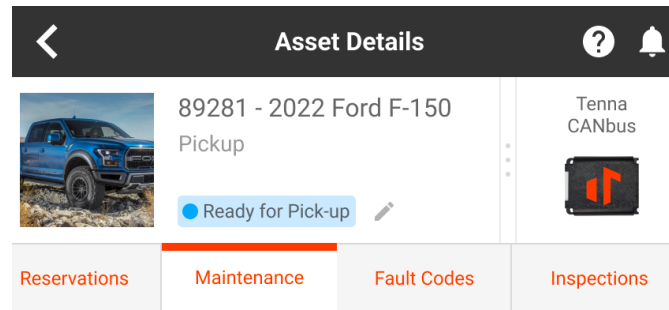
Maintenance Requests

- More Menu
- Asset Details / Maintenance

Work Orders

- More Menu
- Asset Details / Maintenance
- Work Order List

Tap to create from anywhere in the App

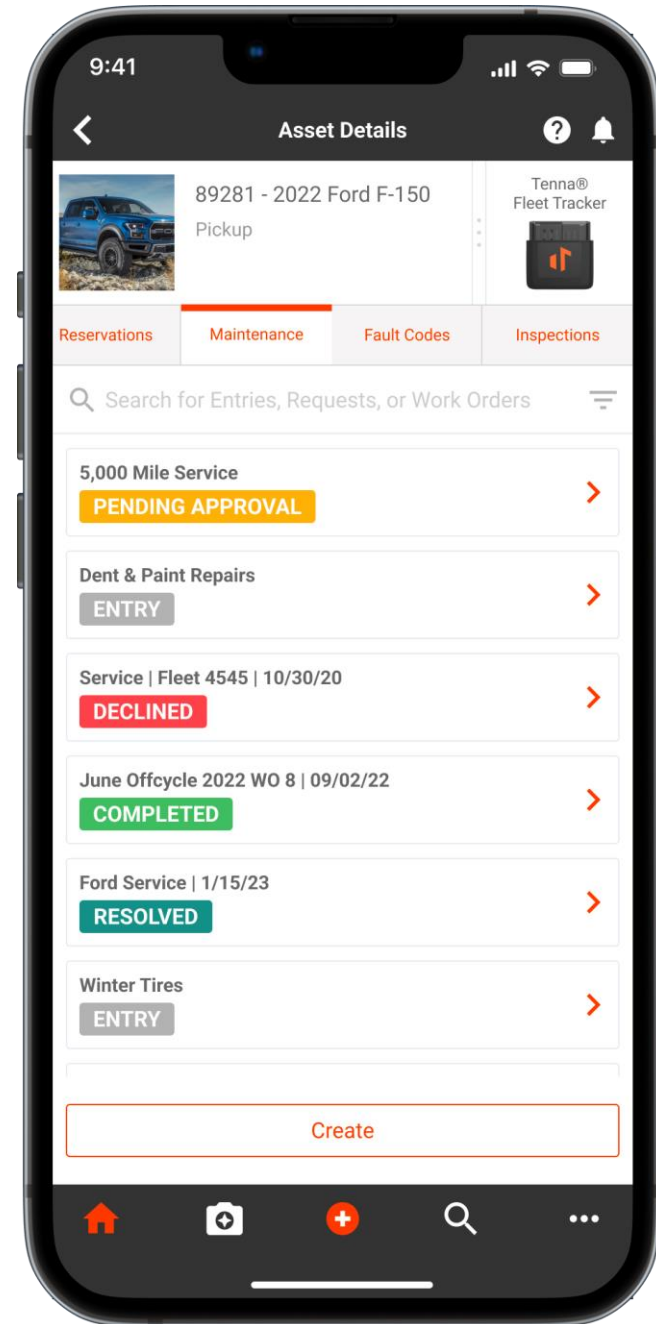


Maintenance by Asset

By Asset

The Maintenance tab in Asset Details provides all maintenance items for the asset.

- Filter by Type or Creator
- Sort by Created date to keep track of your most recent



Maintenance by Assignment, Status, or Priority

Maintenance Request

Filter by

- Requestor
- Mechanic
- Status

Sort By

- Submitted Date
- Title

Work Orders

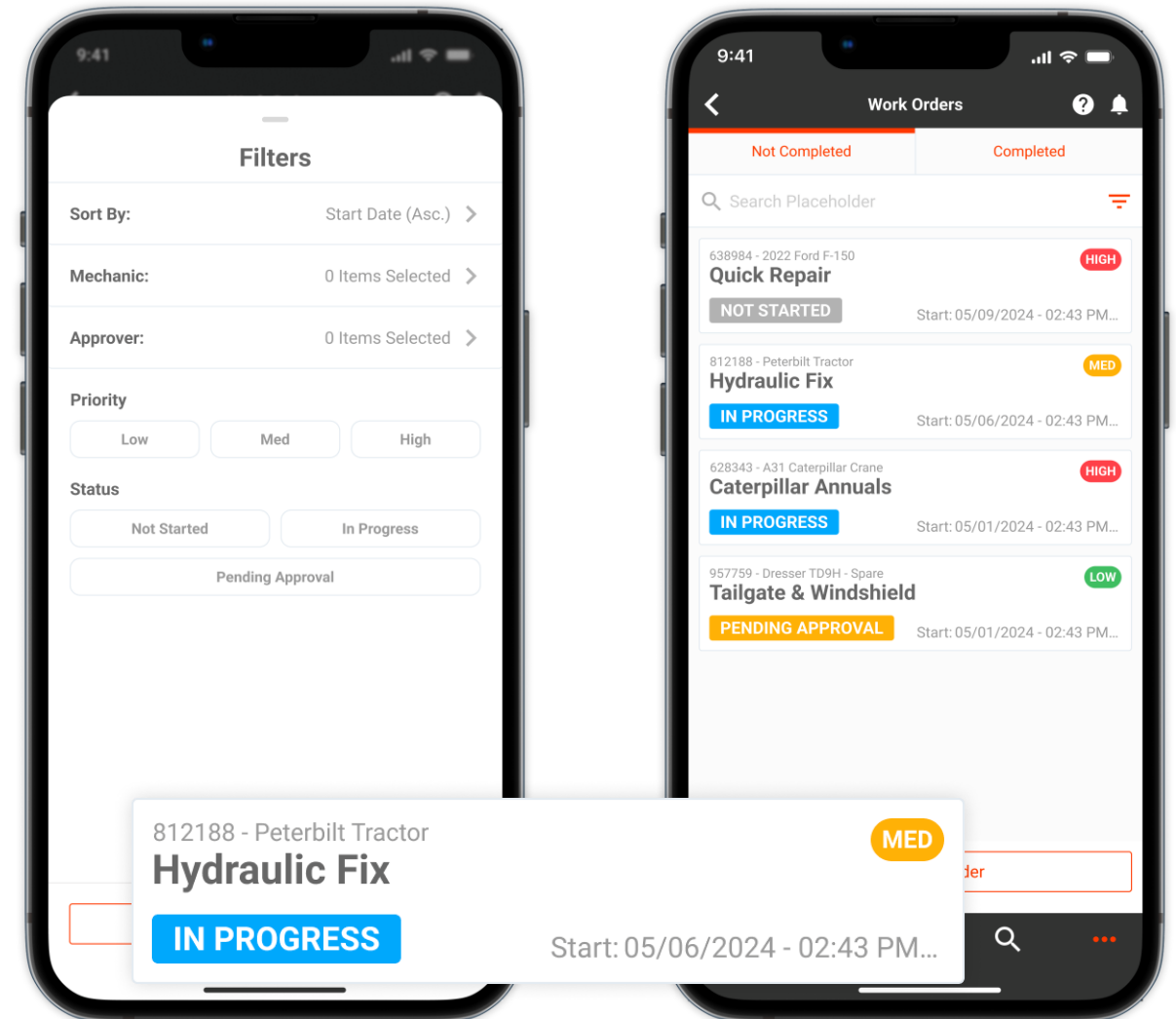
Filter by

- Mechanic
- Approver
- Status
- Priority

Sort By

- Title
- **Start Date**
- End Date
- Created Date
- Priority

Pro Tip! Any Sorting and Filters remain applied to the list. Use this to keep the list set to your workflow.

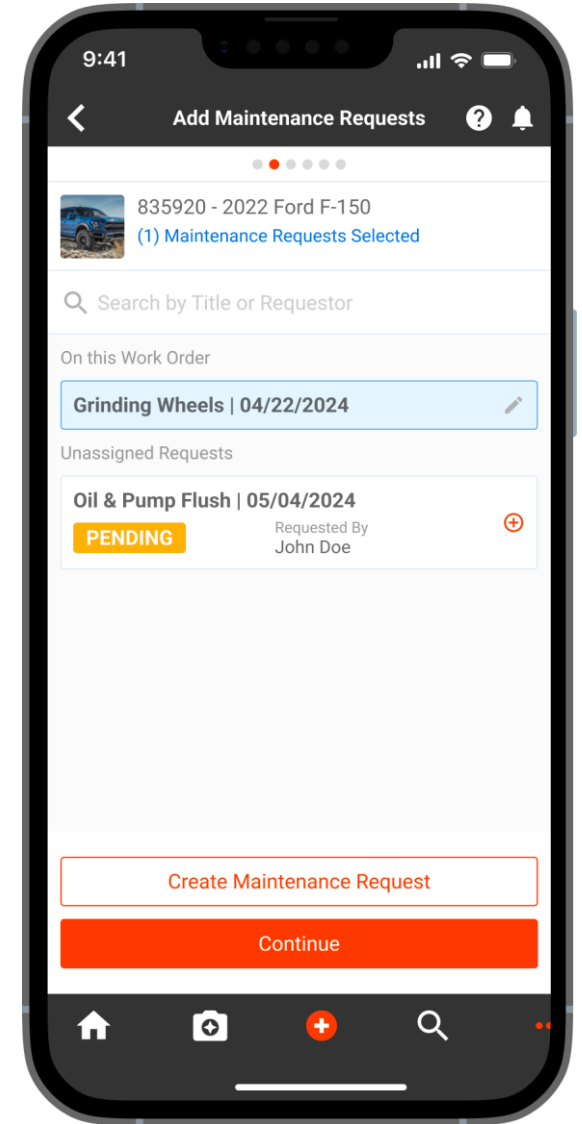
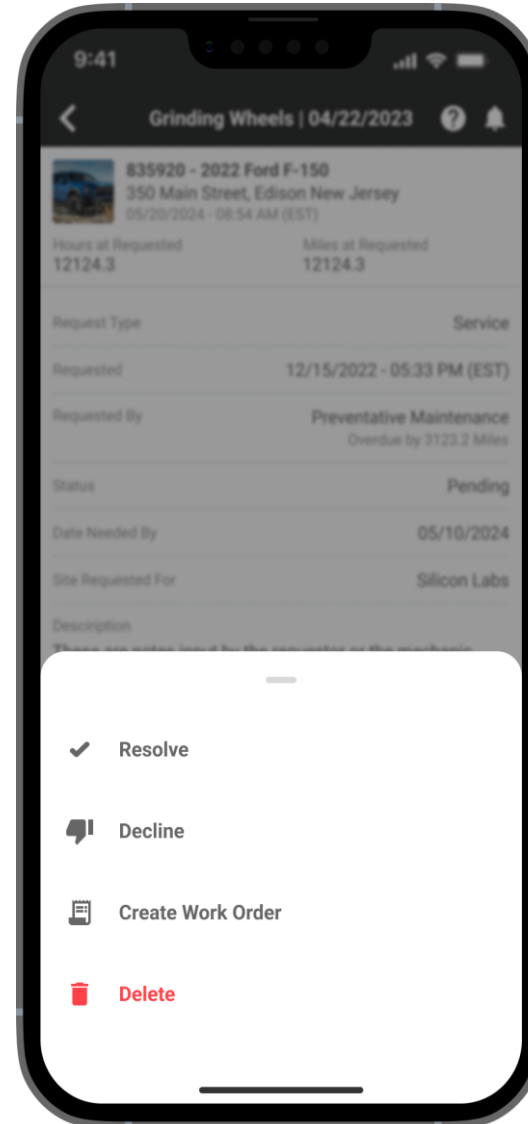


Streamline Work Order Creation

Manage > Create Work Order

1. View a Pending Maintenance Request
2. Select Manage
 - o Need Edit permission
3. Tap on Create Work Order

Pro Tip! You can create new Maintenance Requests while creating the Work Order



Requested Inspections

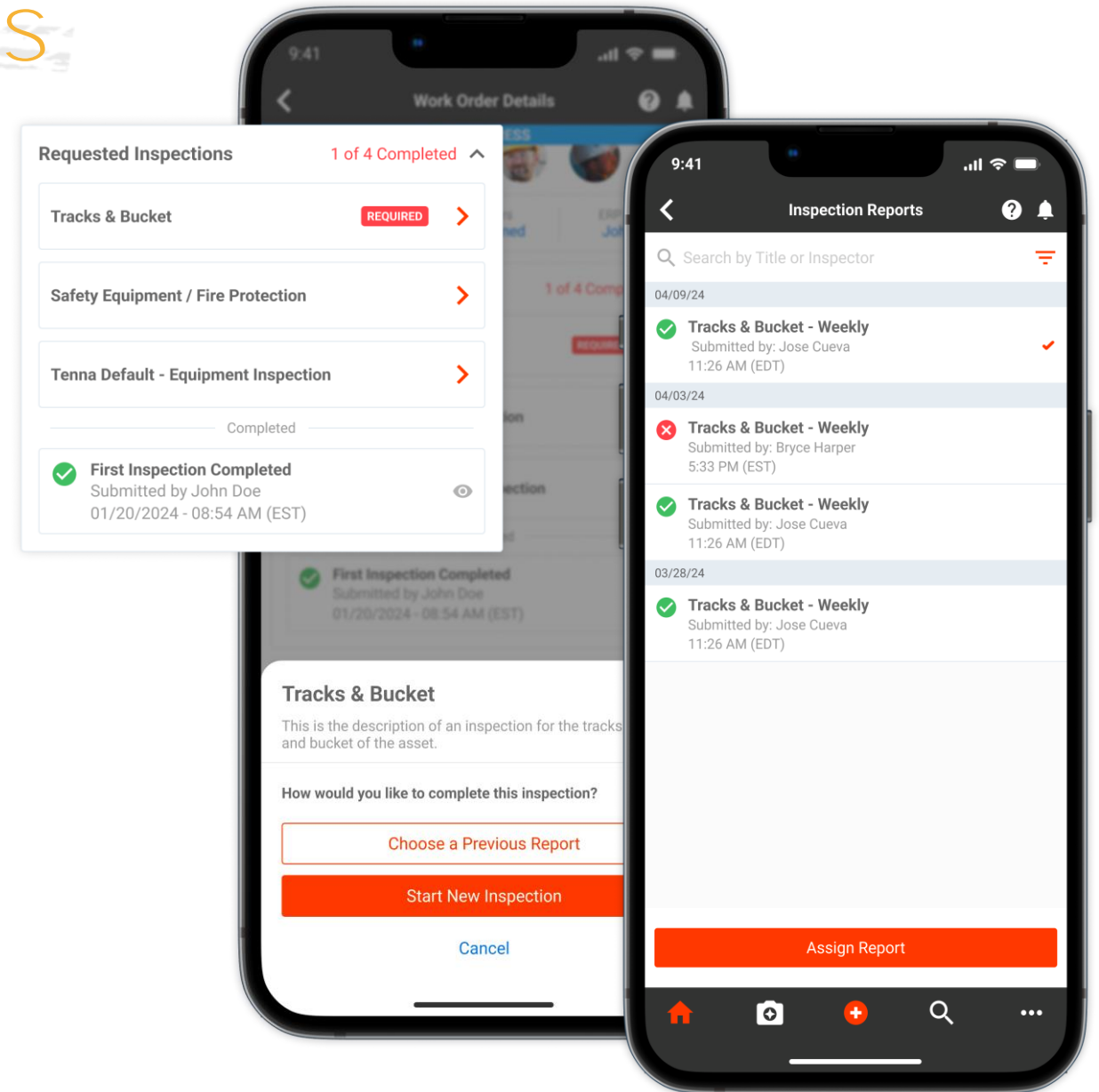
Assigned to Maintenance Requests and Work Orders

All "Required" inspections must be completed to:

- Resolve the Maintenance Request
- Submit Work Order for approval

Two ways to Complete a Requested Inspection:

- Choose a Previous Report
- Start a New Inspection



Adding Parts & Time Entries

Parts >	Time Entries >
12	25.8 Hours

Maintenance Requests

Parts & Time Entries can be added directly to Maintenance Requests.

- If you add it to a Work Order, any existing Parts & Time Entries remain on the maintenance request
- Before you can Resolve the request, all parts require commitment

Work Orders

Parts & Time Entries can be added directly to Work Orders

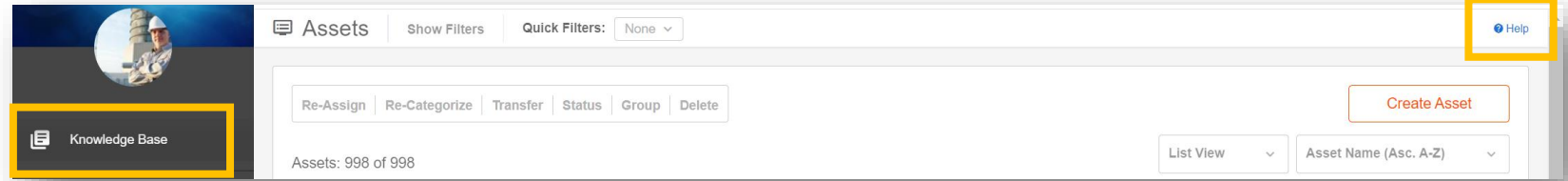
- **Best Practice:** Use the Work Order as your central location for the parts & time needed to complete the requested Maintenance
- Before the Work Order can be completed, all parts require commitment

Pro Tip! Commit to Part = Transact from inventory (if applicable) and add to asset.

Questions?

Tenna Knowledge Base

Resources on these topics (and more!) can be found in our help library



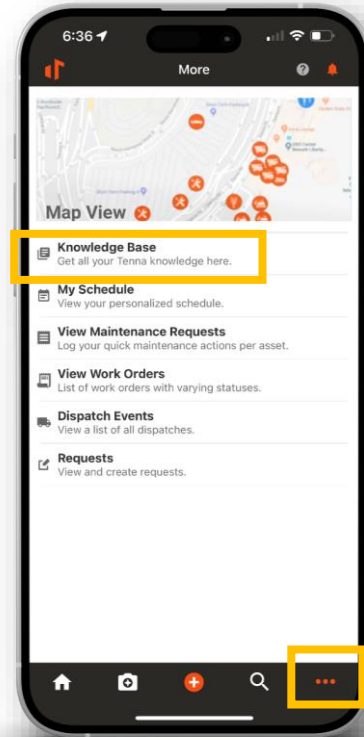
Assets Show Filters Quick Filters: None

Re-Assign Re-Categorize Transfer Status Group Delete

Create Asset

Assets: 998 of 998

List View Asset Name (Asc. A-Z)



6:36

More

Map View

Knowledge Base
Get all your Tenna knowledge here.

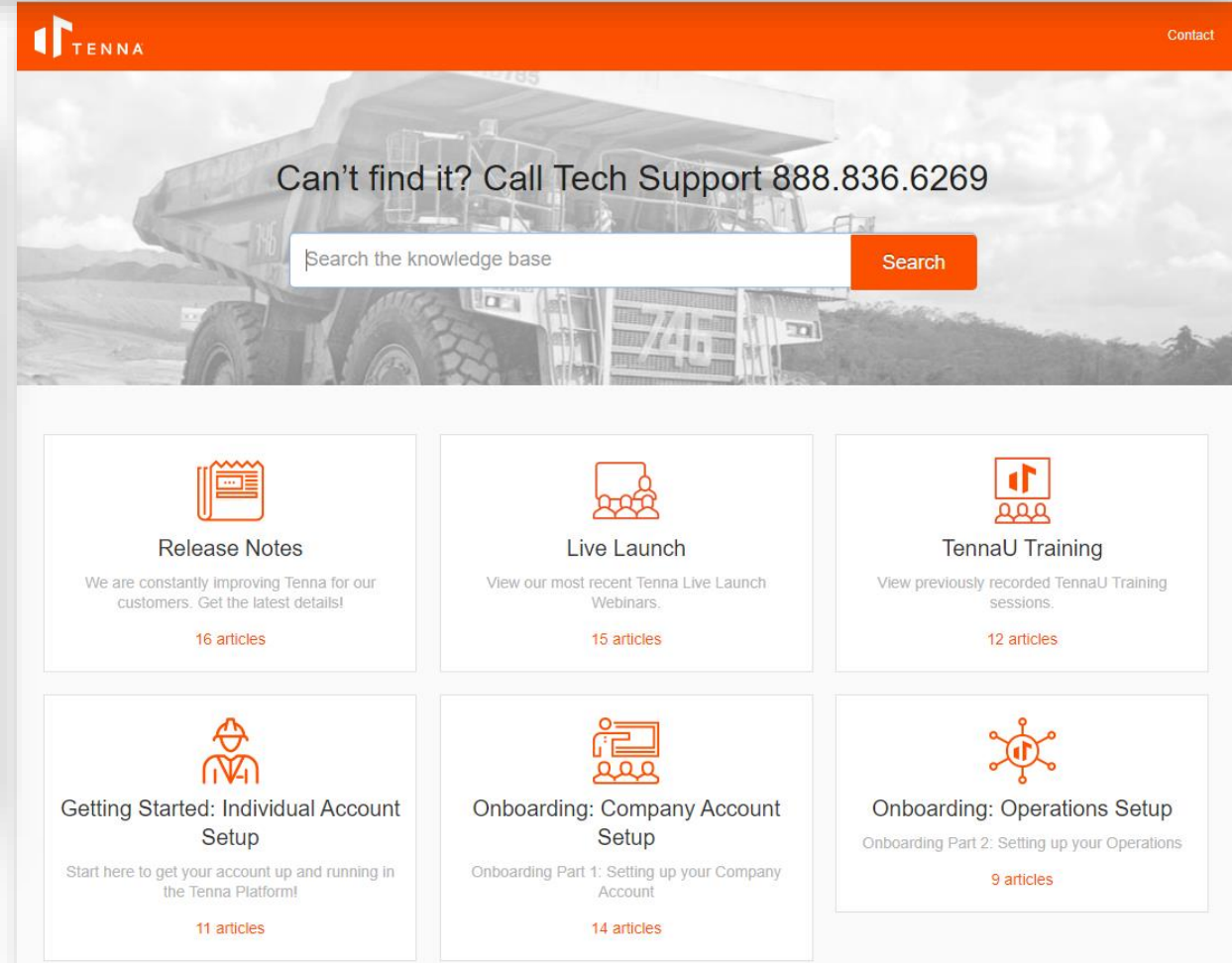
My Schedule
View your personalized schedule.

View Maintenance Requests
Log your quick maintenance actions per asset.

View Work Orders
List of work orders with varying statuses.

Dispatch Events
View a list of all dispatches.







Requests
View and create requests.



TENNA Contact

Can't find it? Call Tech Support 888.836.6269

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Poll

What is your preferred method of learning?

More
Chances
To Learn

Next product release coming soon!

Tenna Live Launch
May 16th at 1 PM EST
[Check your inbox!](#)

How's your Tracker Health?
Don't know, then contact us for
Tracker Insights
Training Session!

Poll

What topics are you interested in covering in future Tenna training sessions?

Stay
Connected

TennaSHOP

LinkedIn Group for Tenna users to connect with one another to:

- Ask questions
- Talk about new and unique use cases
- Share best practices
- Share information about integrations
- Swap success stories

<https://www.linkedin.com/groups/9034188/>

TENNA
SHOP



Come see us! **We'll be speaking or exhibiting** at the following events:

FoundationSoft
Converge 24
4/22-4/25
Nashville, TN

CFMA Annual
Conference
5/18-5/22
Grapevine, TX

Thank You

