TennaU Training:

Maintenance & Preventative Maintenance

12/09/2022

Meet The Team



Ross Porter Jr. UI/UX Designer



Tom Caliendo Lead UI/UX Designer

Moderator: Colleen Lyerla Marketing Communications

Today's Agenda

We're going to cover the following Maintenance topics



FEATURES



WORK ORDERS



PERMISSIONS



DTC / FAULT CODES



ENTRIES



NOTIFICATIONS



REQUESTS



PREVENTATIVE MAINTENANCE

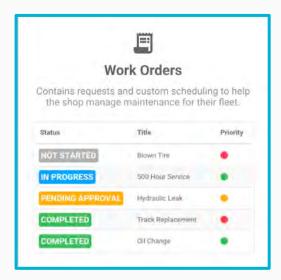


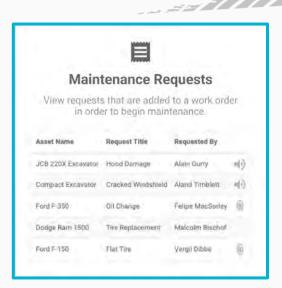
CREATE SERVICES

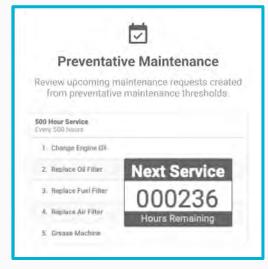


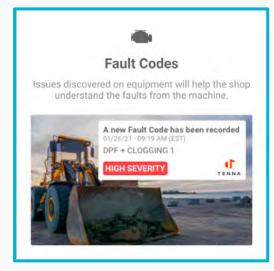
Maintenance Sub Features

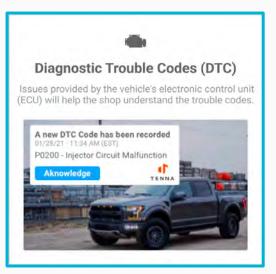
- Maintenance Entry
- Maintenance Requests
- Preventive Maintenance
- Work Orders
- Fault Codes
- DTC Codes



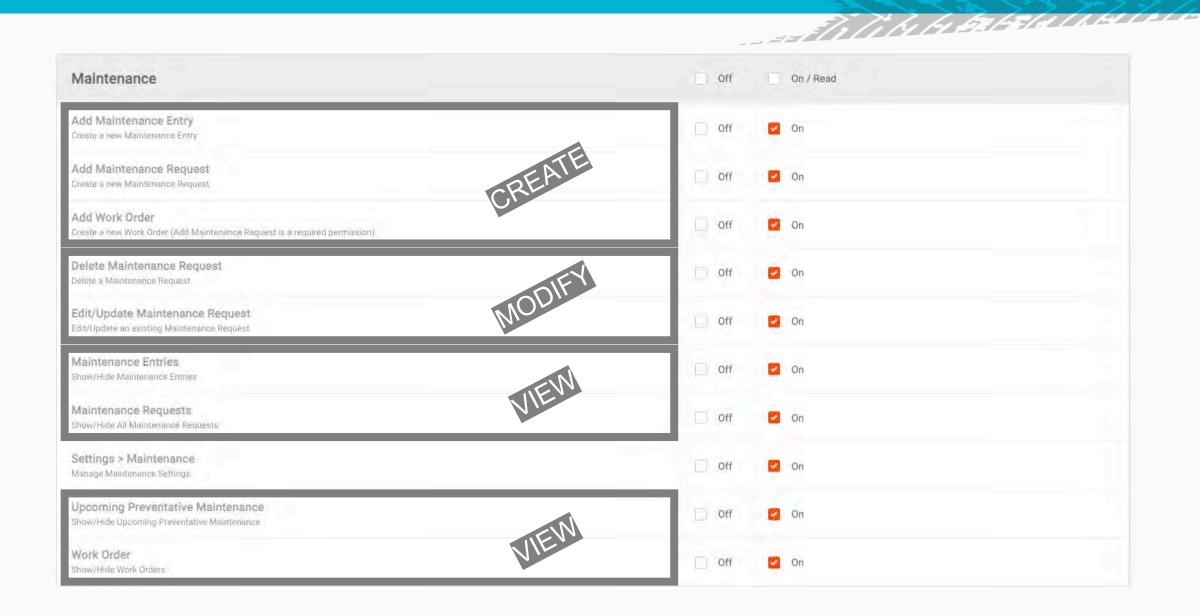








Maintenance: Permissions

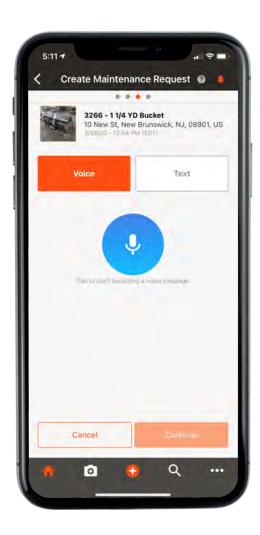


Maintenance Entry

A Maintenance Entry is a ledger entry created by a user to make note of a service or a miscellaneous repair they performed on an asset.

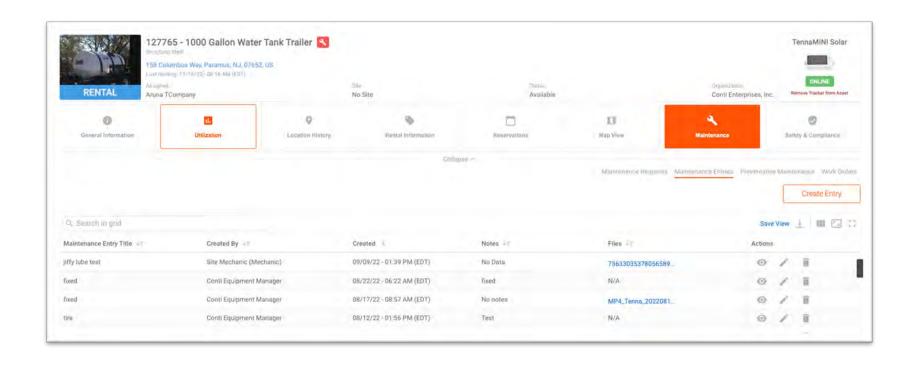
- Maintenance Entries exist within individual Asset Details, not within the Maintenance Feature itself.
- Maintenance Entries may be created from the desktop app and the Tenna Mobile App.

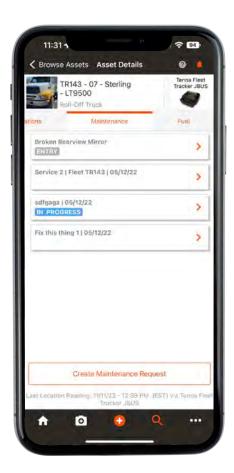




Maintenance Entry: Viewing

Maintenance Entries for an asset can be accessed from the asset page on both the web and mobile application

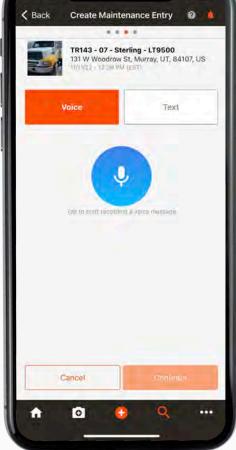


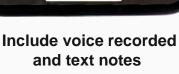


Maintenance Entry: Creating (Mobile)

- Users on the go or in the field can easily identify equipment via QR code or search.
- Creating an entry is a fast and simple way to associate work performed on an asset that does not require a work order.





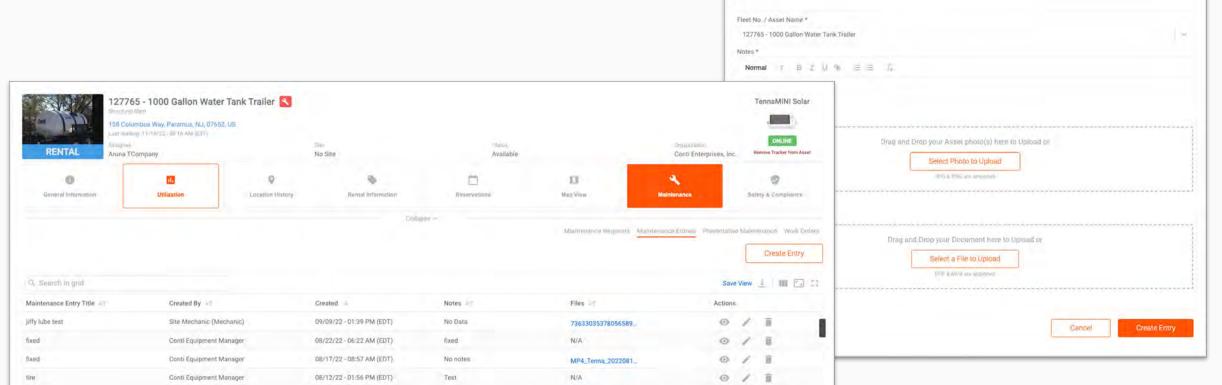




Attach photos right from your mobile device

Maintenance Entry: Creating (Web)

Users can also create maintenance entries on the fly from asset details on the web app.

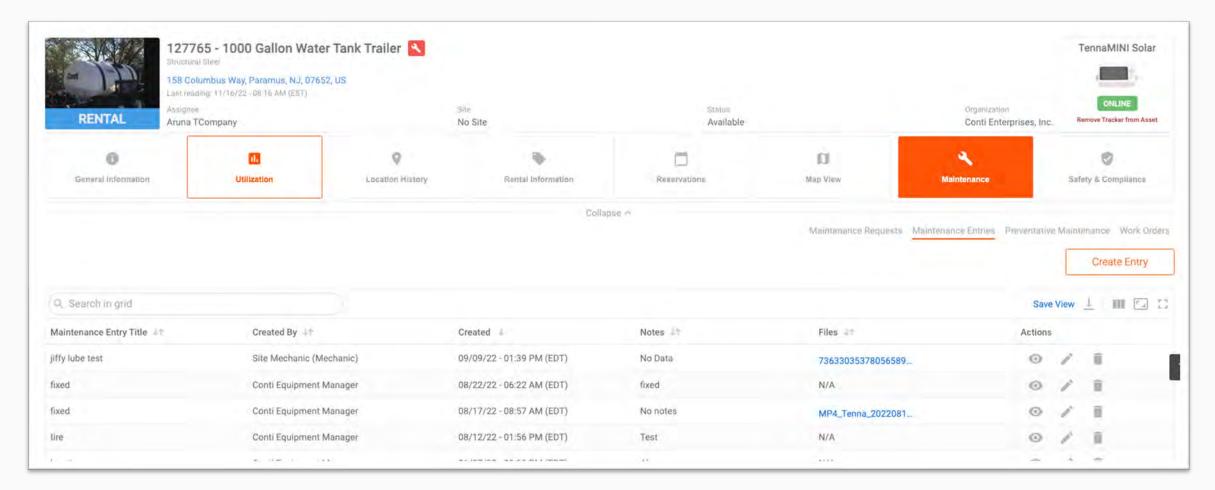


Create a Maintenance Entry

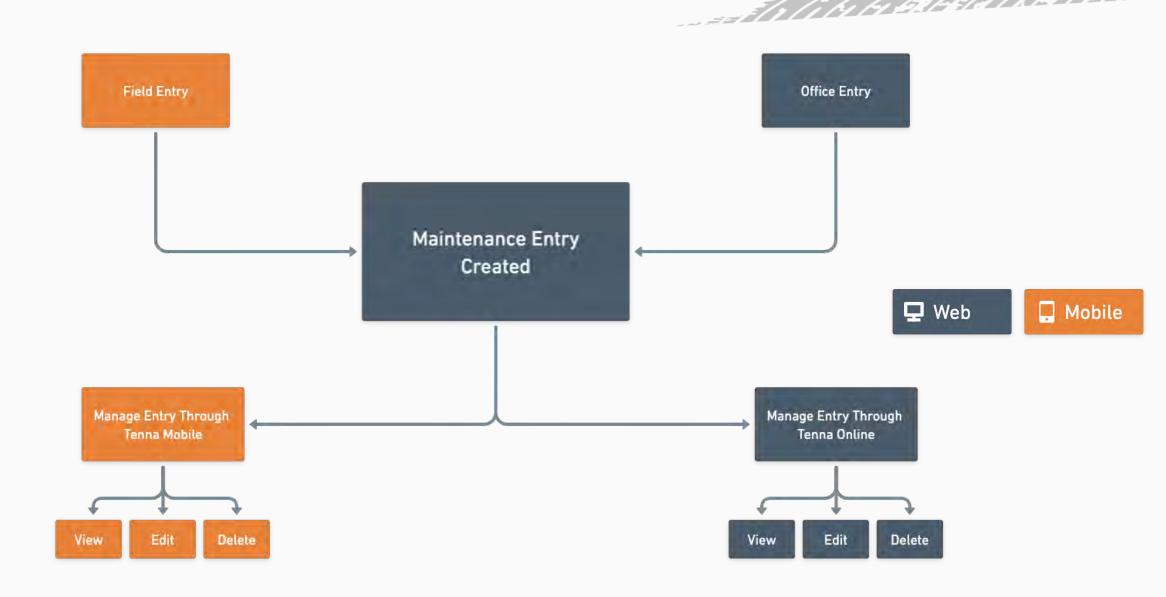
Maintenance Entry Title #

Maintenance Entry: Manage

Maintenance Entries are records with no further action. Users can view, edit and delete Maintenance Entries.



Maintenance Entry: Create Flow



Maintenance Requests

- Requests can be manually created by a user or automatically created by recurring preventative maintenance services.
- Submitting a maintenance request allows users to quickly submit repair or service needs to a shop or specific mechanics with sufficient detail.
- Maintenance requests are created for a single asset, but assets can have more than one maintenance request associated to them at any time.

Statuses:

PENDING

DECLINED

RESOLVED

NOT STARTED

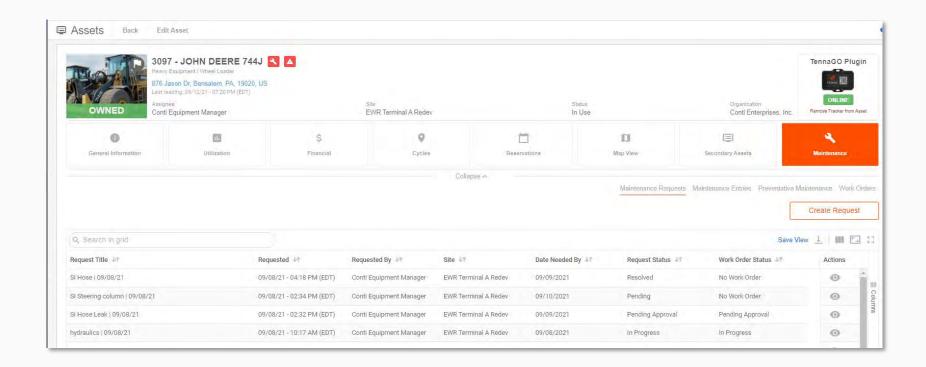
IN PROGRESS

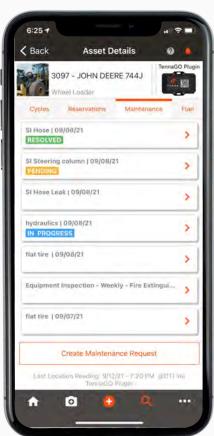
PENDING APPROVAL

COMPLETED

Maintenance Request: Viewing

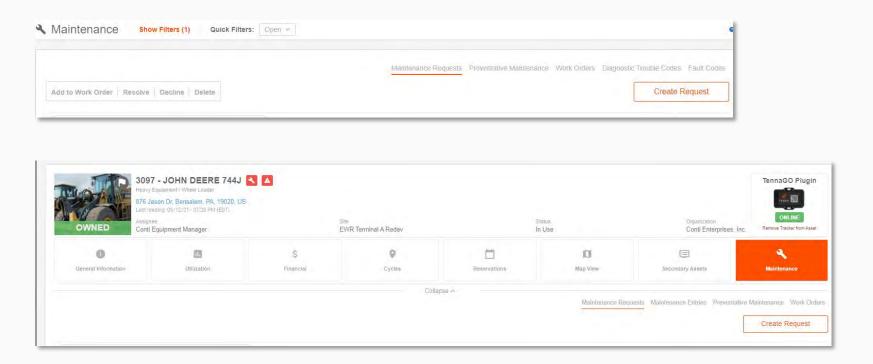
- Maintenance Requests can be accessed from the asset details page on both the web and mobile application.
- This provides a holistic view of all maintenance or service needs of an asset.

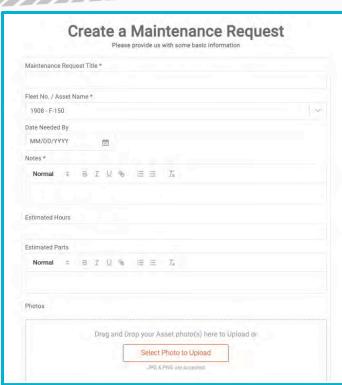




Maintenance Request: Creating (Web)

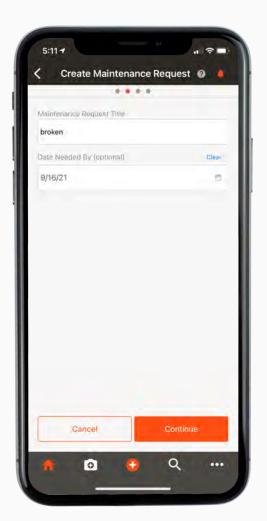
- Users can create maintenance requests from the asset details or the maintenance feature on the web app.
- Users can include the date they need the repairs, notes, estimated hours, estimated parts and upload photos.

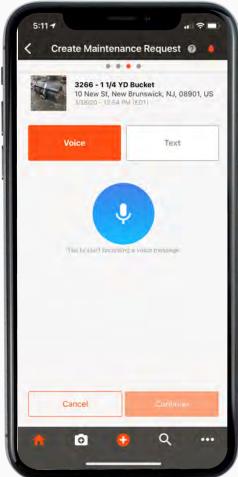


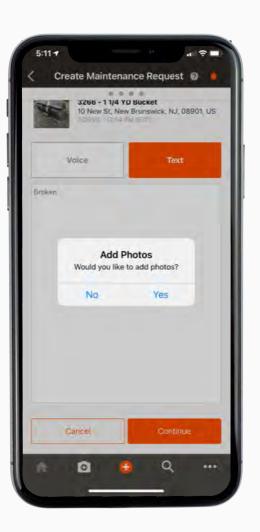


Maintenance Request: Creating (Mobile)

- Users can create a
 maintenance request from the
 asset details page,
 maintenance request list,
 or the create menu.
- Users can include the date they need the repairs, a voice recording, notes, and photos from their device.

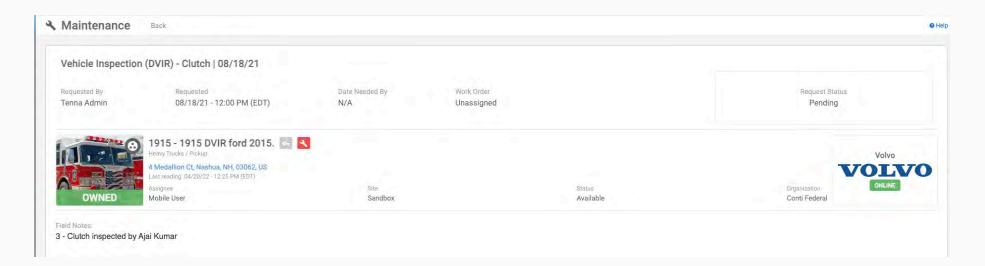


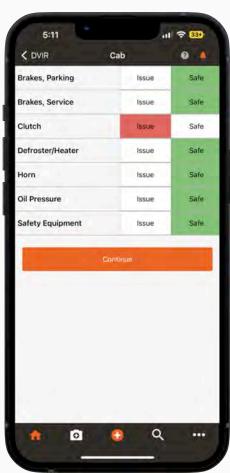




Maintenance Request: DVIR & Inspection Items

- Flagged Issues on DVIRs and Inspections automatically create maintenance requests in the Tenna platform.
- These maintenance request include the inspection form title, name of the flagged issue, and the description attached by the inspector.

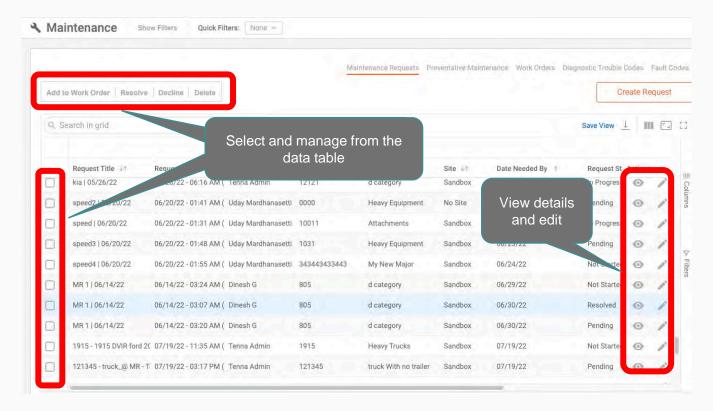


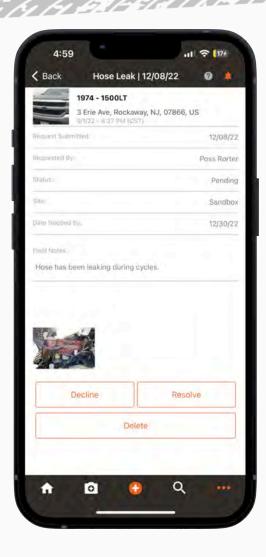


DVIR & Inspection check items

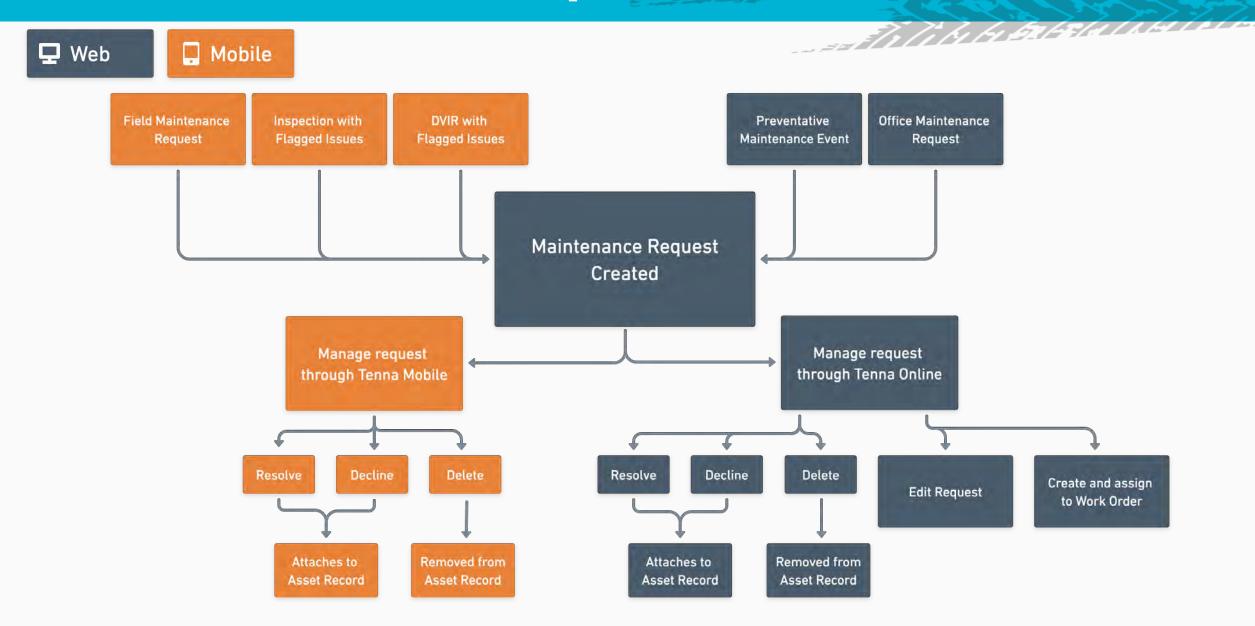
Maintenance Request: Managing

- Users can easily View, Resolve, Decline, and Delete Maintenance Requests on both the Tenna Mobile and Web application
- Maintenance Requests can be edited on Tenna Web





Maintenance Request: Create Flow



Preventive Maintenance

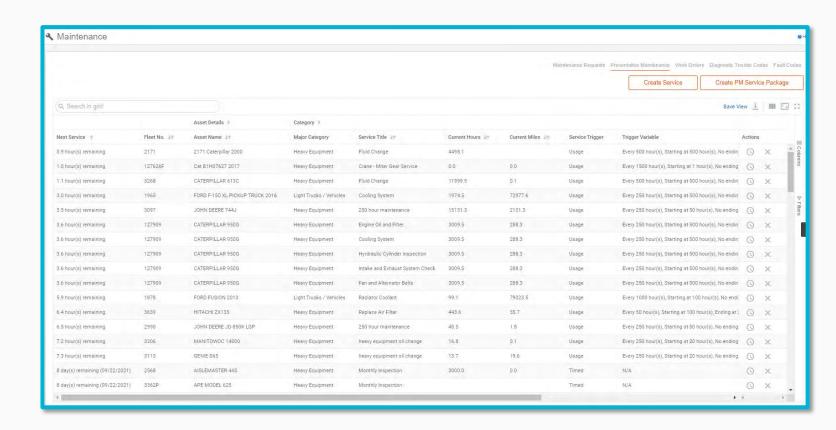
Users can build out custom maintenance packages based on time or usage to automatically trigger when service is due for all their assets.

- Notifications are automatically sent to mechanics and/or shop personnel when service or repairs are coming due.
- Preventative Maintenance can be managed within the web app.



Preventive Maintenance: View

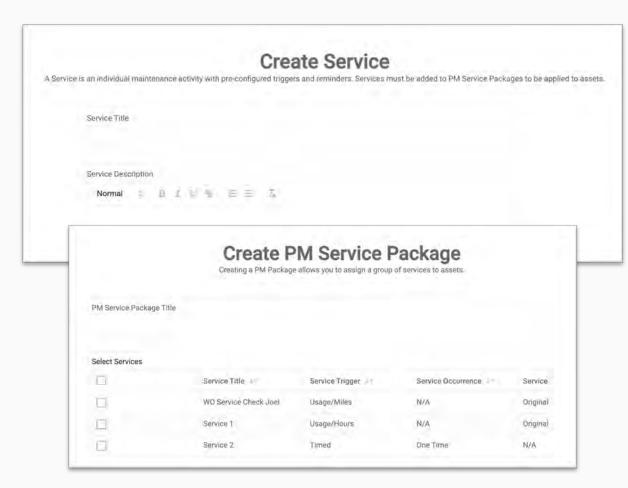
- Preventative maintenance requests are automatically triggered based on user defined criteria – Time, Hours, or Miles.
- These automated requests are fundamental to ensure uptime and availability for your equipment.

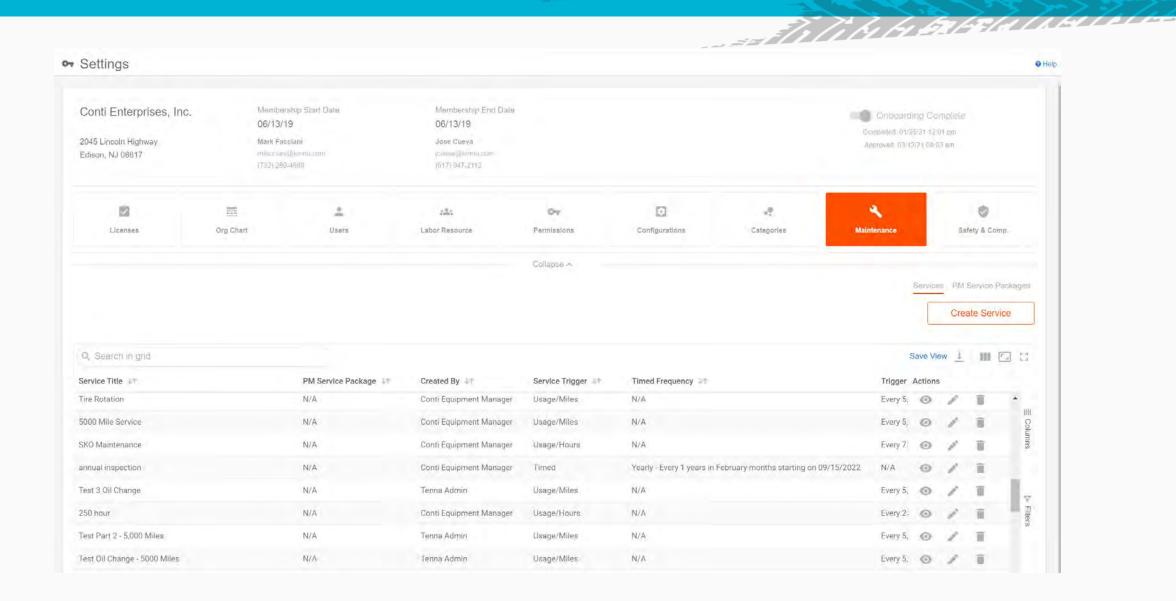


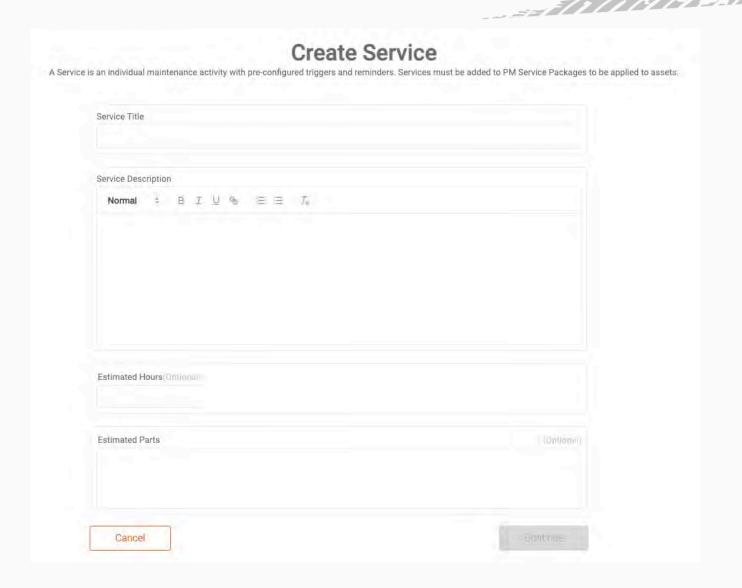
Preventive Maintenance: Create

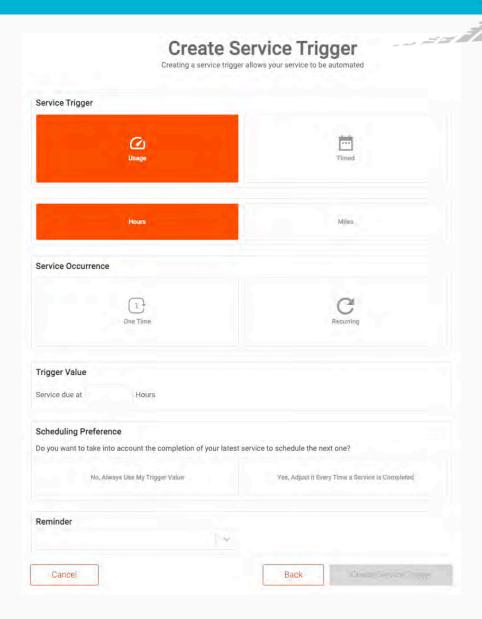
Users will need to create two items to set up their Preventive Maintenance schedules.

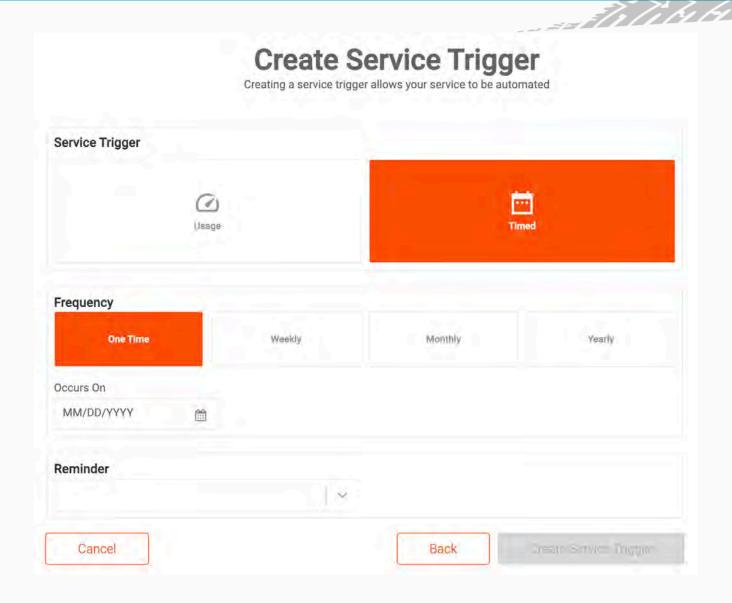
- First, users need to create a "Service".
 A Service is a maintenance, repair or activity that will be performed on one or more assets (such as oil changes and tire rotations).
- Second, users need to create a "PM Service Package". A PM Service Package is a group of one or more Services that is applied to individual assets or all assets in particular category. A PM Service Package can prompt notifications based on the triggers of the selected services or its own custom trigger (e.g. trigger ever 6 months).

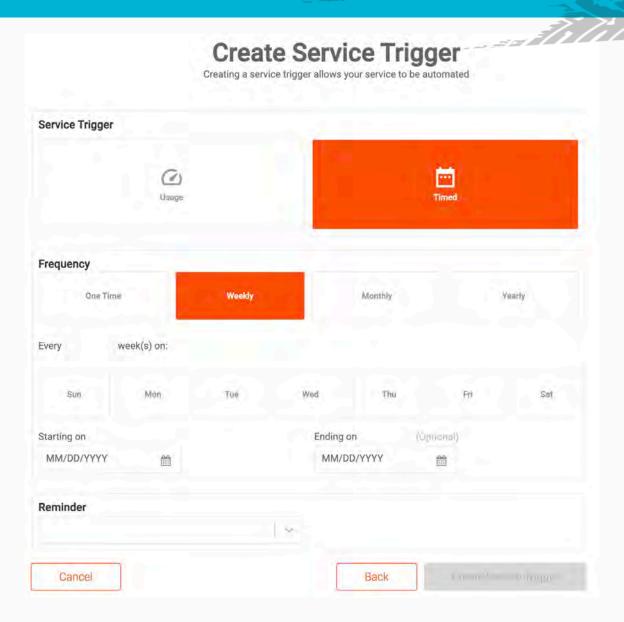


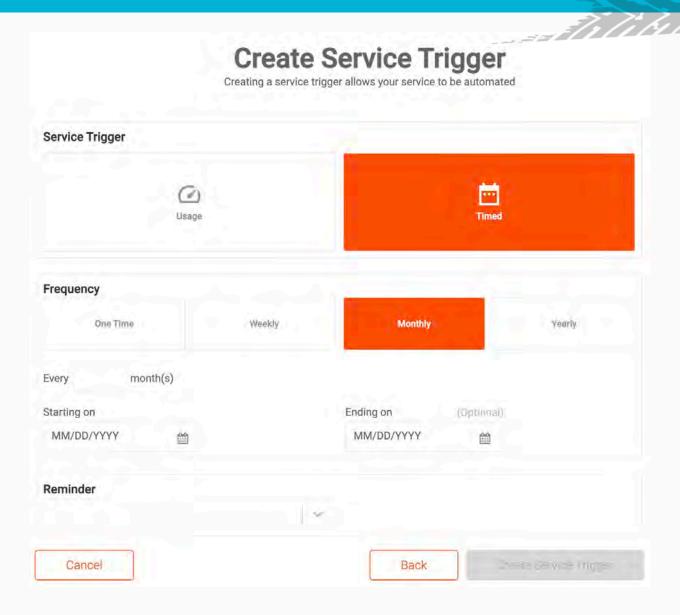


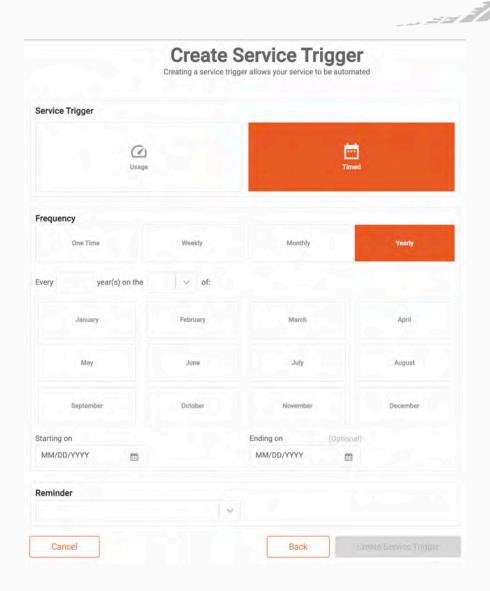


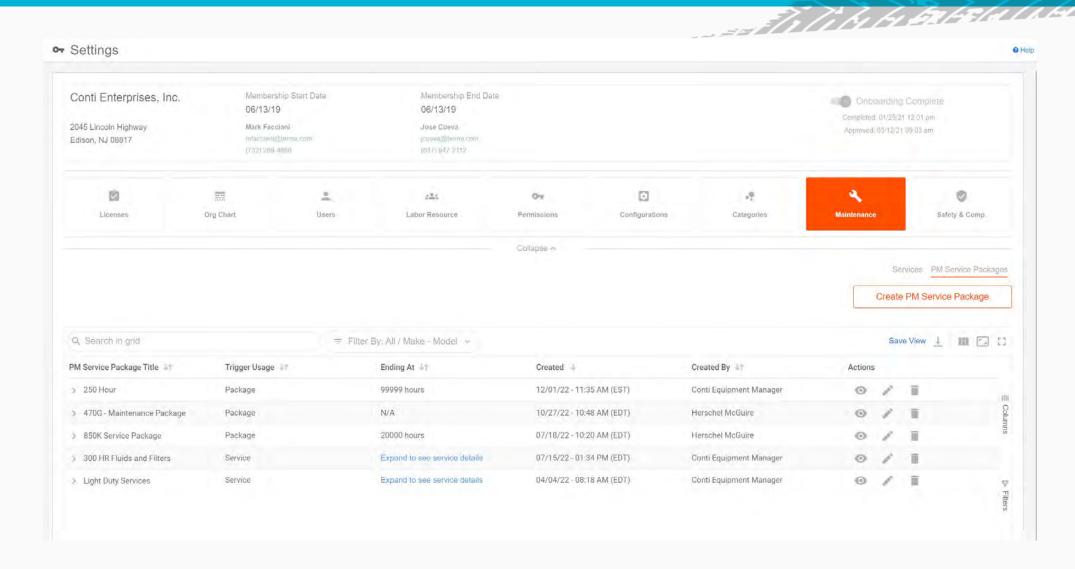


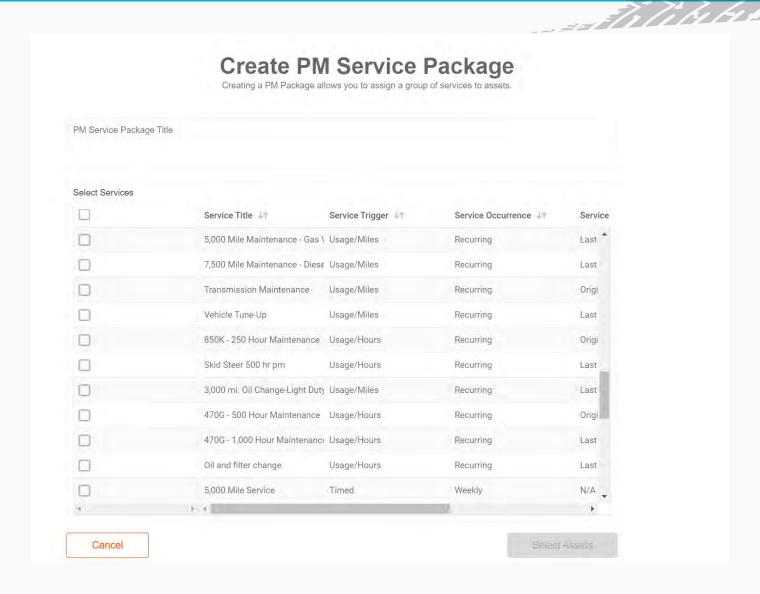


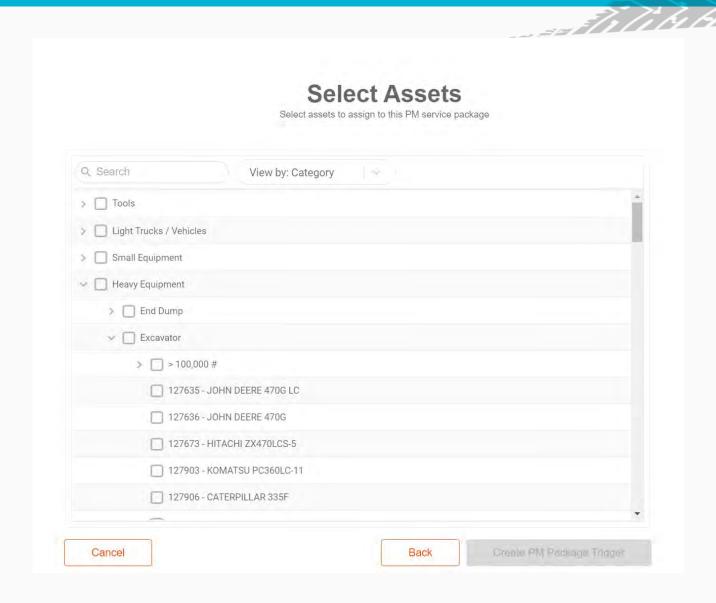


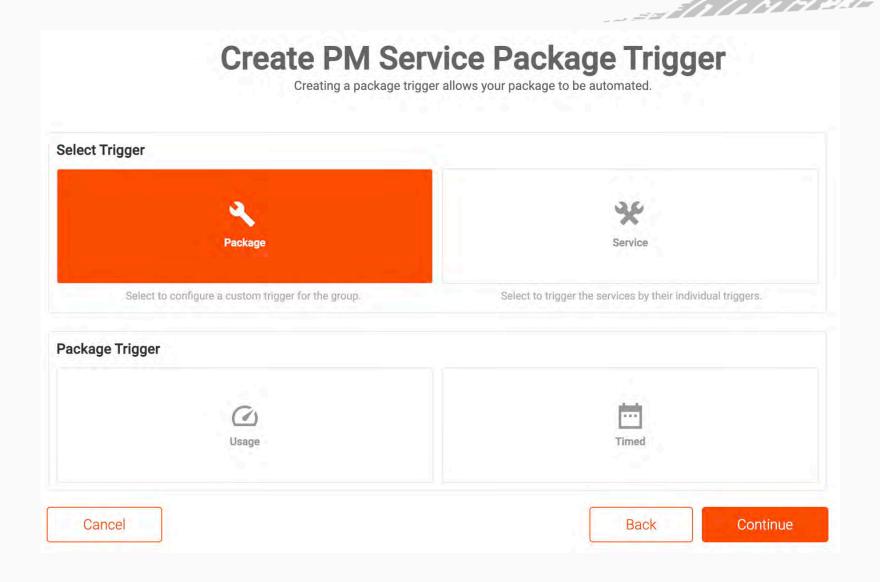


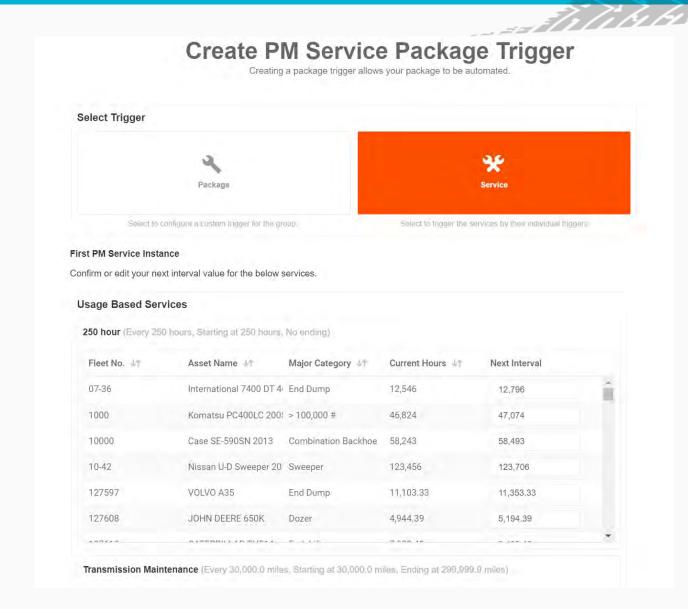




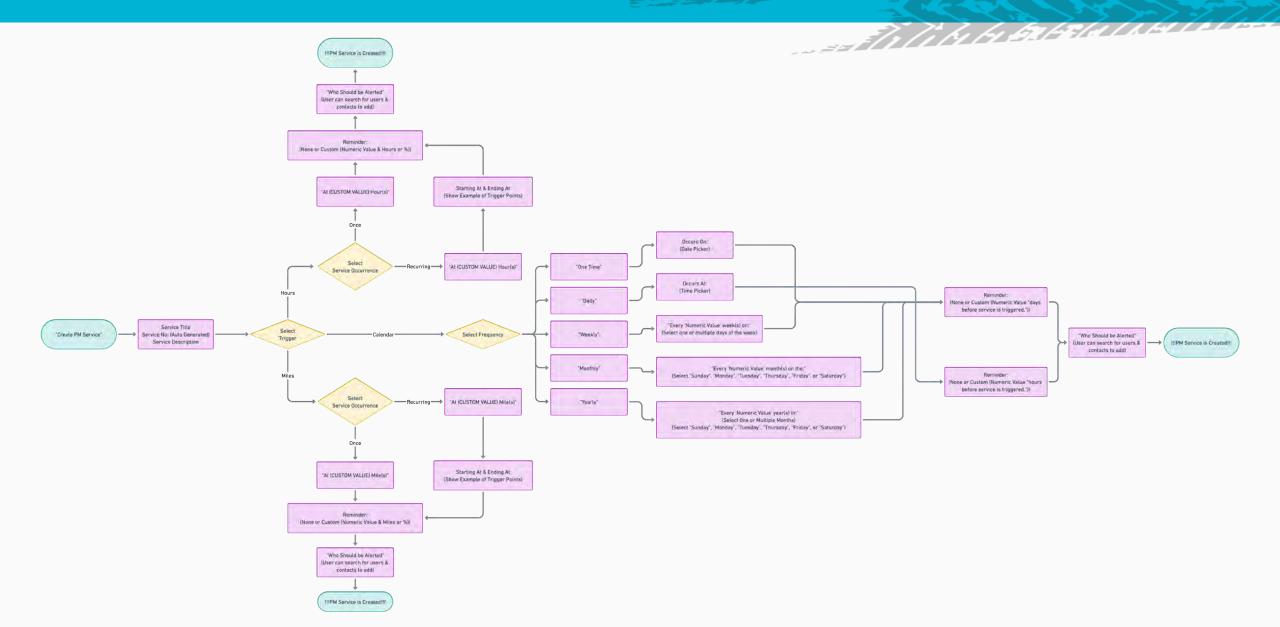






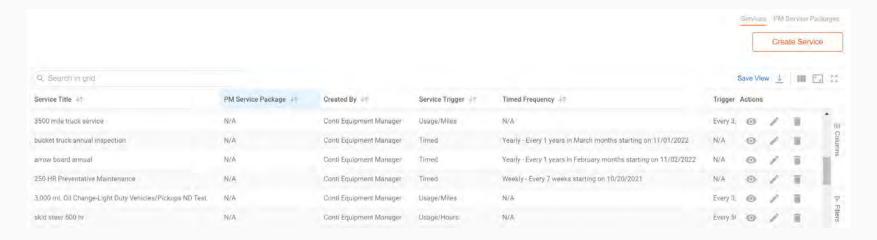


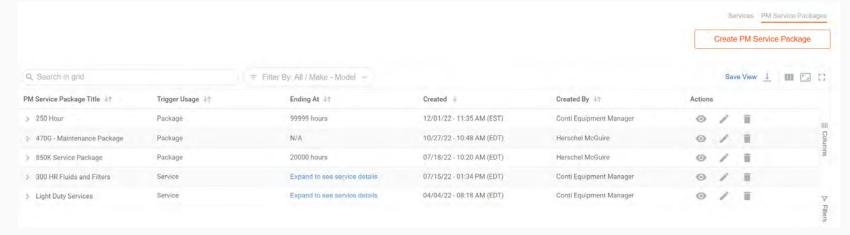
Preventive Maintenance: Create Flow



Preventive Maintenance: Manage

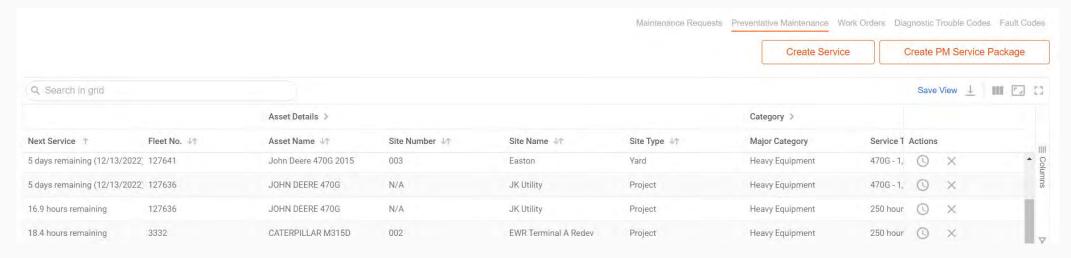
Users can view, edit and delete Services & PM Service Packages





Preventive Maintenance: Manage

Users can Reschedule and Cancel upcoming Preventive Maintenance instances



(Reschedule

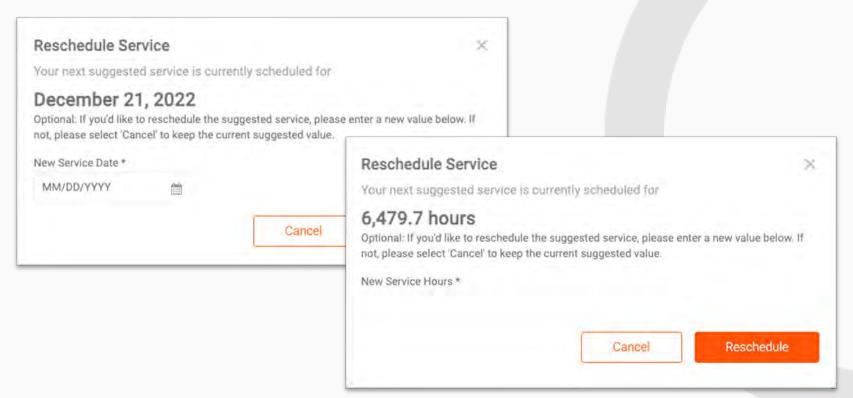
This action allows a user to alter the due date/miles/hours for the next service instance of a specific asset.



This action allows the user to cancel the next service instance. Doing this will automatically reschedule to the next due date/miles/hours.

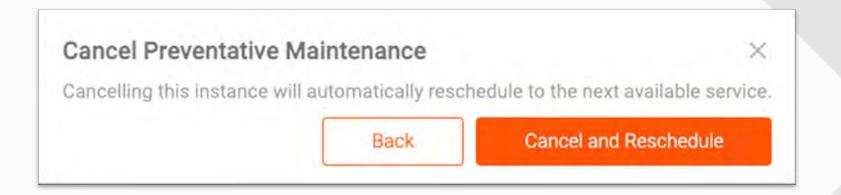
Preventive Maintenance: Manage (Reschedule)

- Clicking the "Reschedule" action will execute one of the two modals seen below.
- One modal is focused on time-based services (e.g. annual certifications) and the other is based on usage (I.e. Hours/Miles)



Preventive Maintenance: Manage (Cancel)

Clicking the "Cancel" action will execute the following confirmation modal.



Work Orders

- A collection of one or more maintenance requests for a single asset that must be worked on by one or more mechanics within a specific time frame.
- Creating a work order allows you to track and report part and labor costs, group multiple maintenance requests into a single action item, and record maintenance notes to an asset's history.
- Created by Equipment Managers, Shop Managers, and those with the required permissions

Statuses:

NOT STARTED

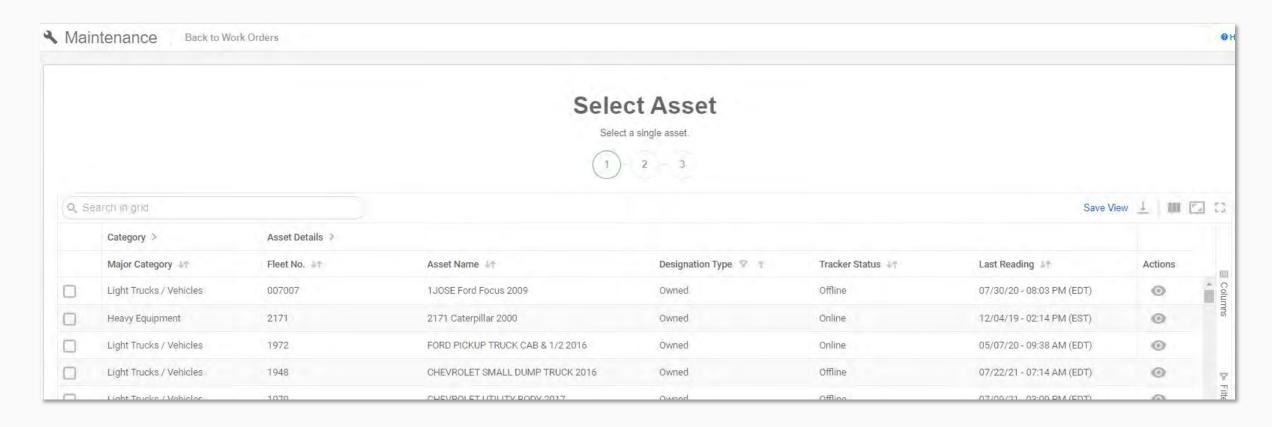
IN PROGRESS

IN PROGRESS

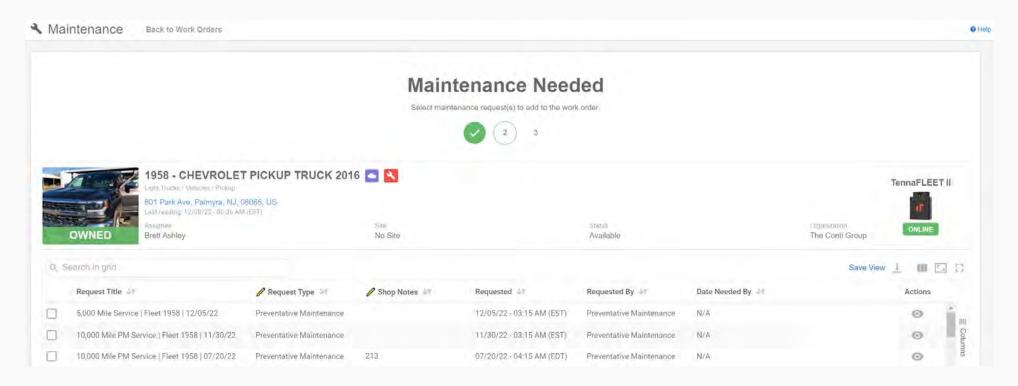
PENDING APPROVAL

COMPLETED

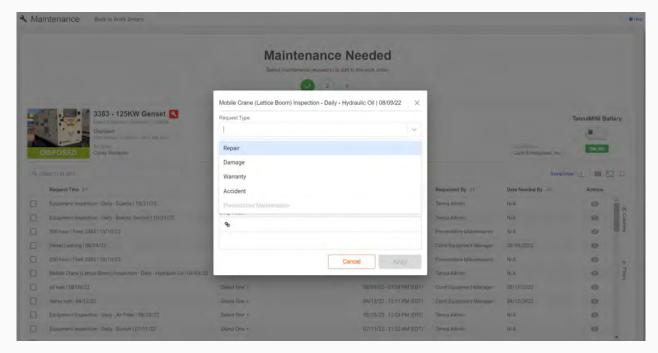
- Select "Create Work Order" from the Work Orders tab within Asset Details or the Maintenance feature to start the process.
- Then, select the asset that the work order is being created for.



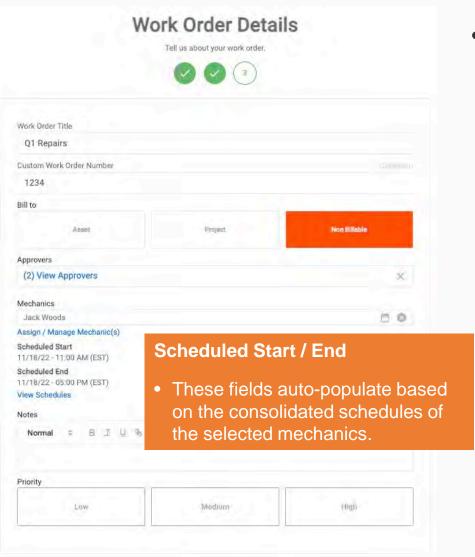
After selecting a specific asset, a list of the open (pending) maintenance requests for that asset will be presented. One or more maintenance requests can be selected to be added to the work order.



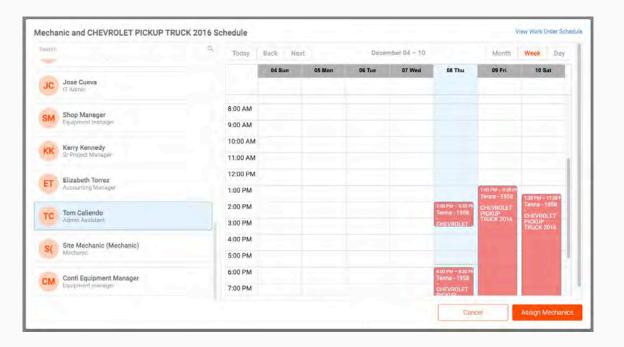
When a Maintenance Request is selected, a modal displays, allowing users to add the request type, shop notes, and update estimated parts and hours for the request.



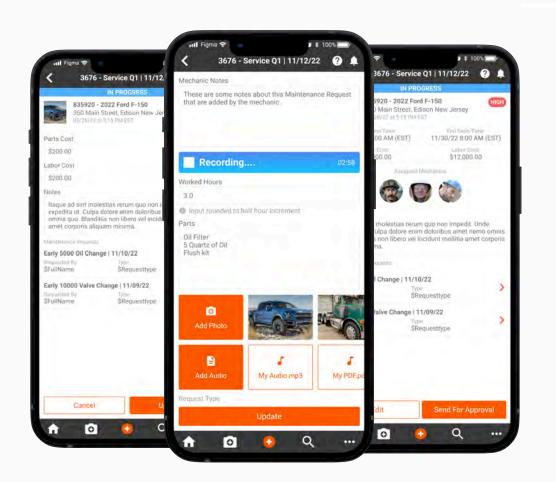
If you select a preventative maintenance service, the Request Type will auto populate as "Preventative Maintenance"

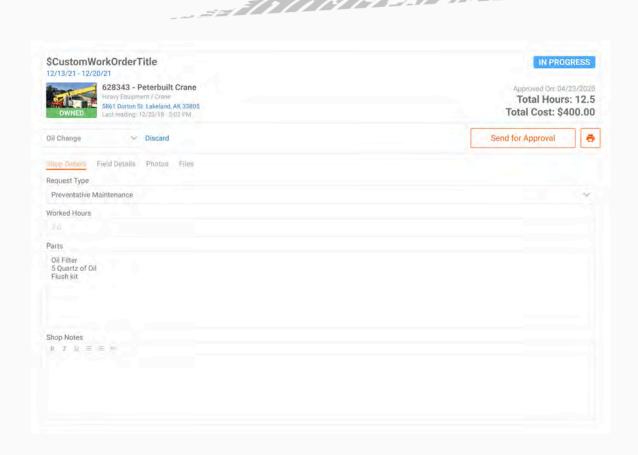


- After adding the maintenance requests, users can assign a title, number, resources (mechanics & approvers), and a priority to the Work Order
- Assign mechanics by selecting an open time frame on their schedule. Mechanics will receive an alert via push notification to Tenna mobile



Maintenance: Update Work Order

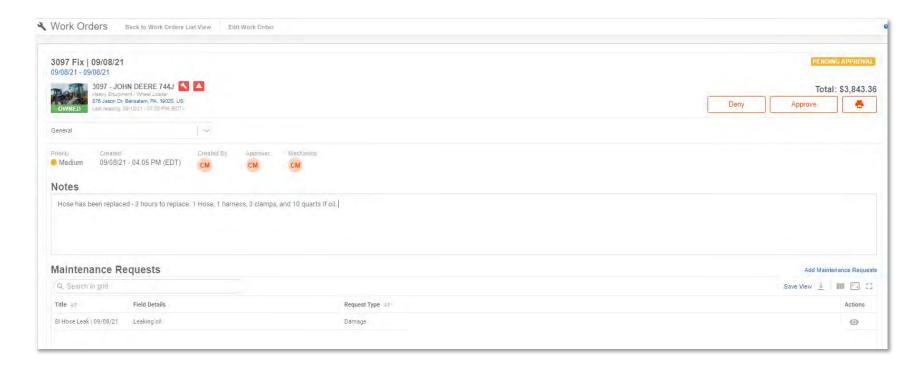


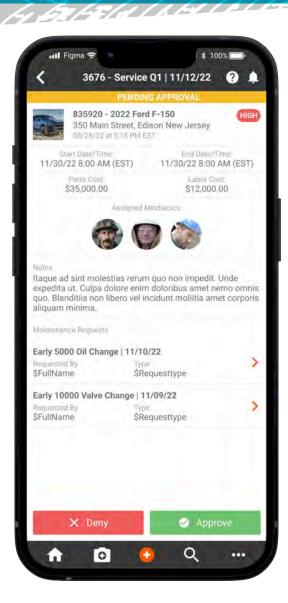


Web and Desktop Users can quickly locate, review, update, and send work orders for approval.

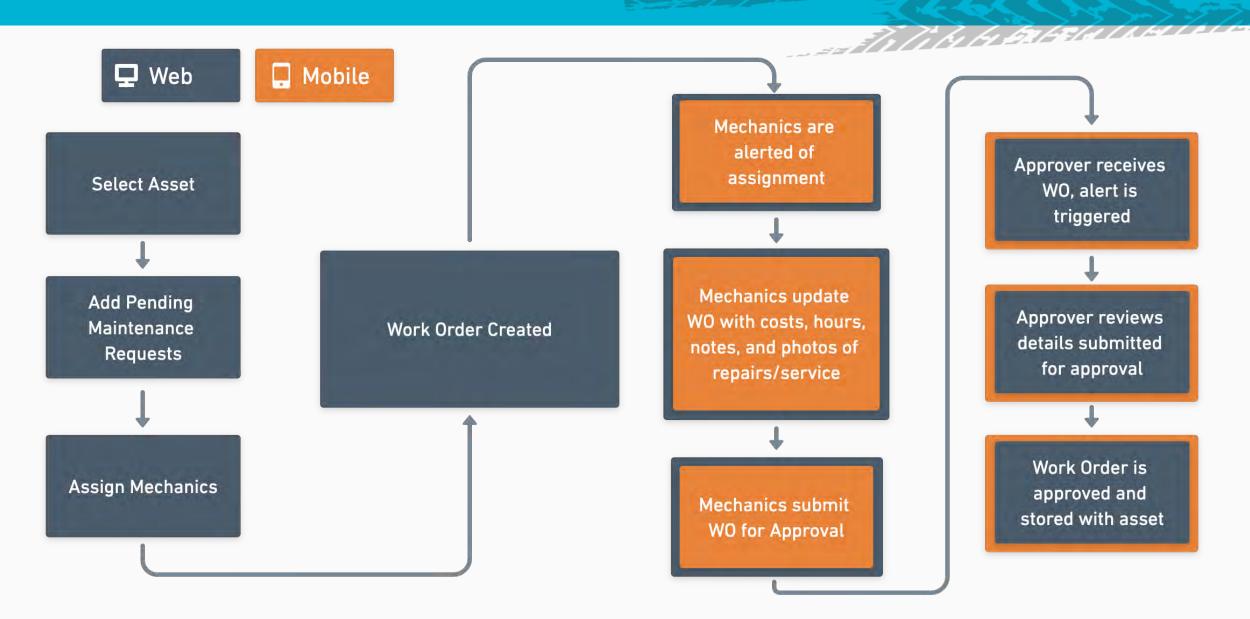
Maintenance: Approve Work Order

- After receiving your alert that a WO is ready to review, simply pull up the order on web or mobile, review notes, photos, recordings, costs and approve the work order.
- Once approved the WO status is Completed. If denied, the WO returns to In Progress and is flagged as denied.





Work Order: Workflow



DTC & Fault Codes



Diagnostic Trouble Codes (DTCs) are codes used to identify malfunctions in vehicles. These will appear for vehicles with TennaFLEET or TennaCAM trackers.



DTCs and Fault Codes can be viewed and acknowledged by Web and Mobile users

FAULT CODES

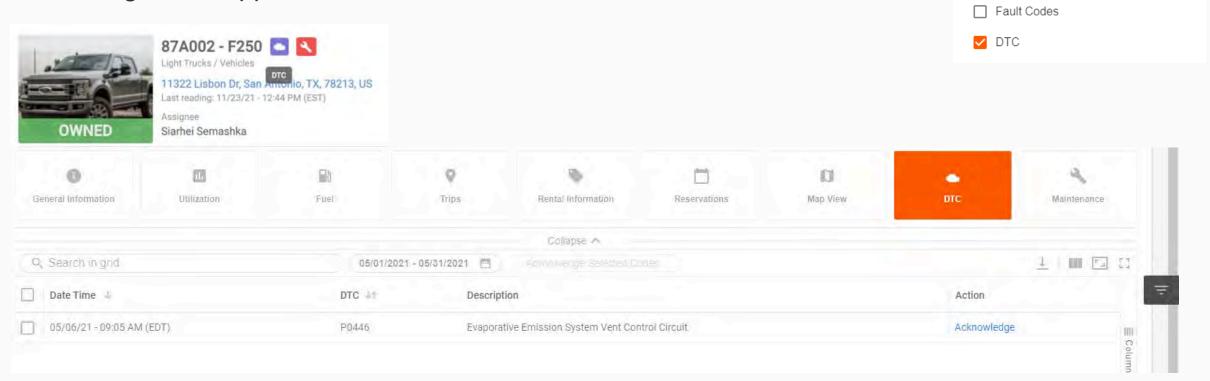
(AEMP) Fault Codes are diagnostic codes for heavy equipment. These will appear for equipment using OEM Telematics from Caterpillar, John Deere, and Komatsu.



- Acknowledge = mark as read.
- Once acknowledged, the user and the date-time of acknowledgement is captured and displayed

DTC & Fault Codes: View (Web)

- On Web, DTC & Fault Codes can be viewed and acknowledged from the individual Asset Details page, or from the Maintenance feature.
- Users can quickly find assets with codes by filtering the asset list by the "DTC" or "Fault Code" Tag. Once all trouble codes are acknowledged, the tag will disappear.



Select All Clear 1 ^

Tags

Left Behind

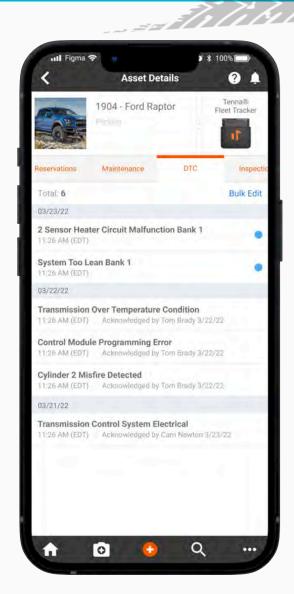
Inactive

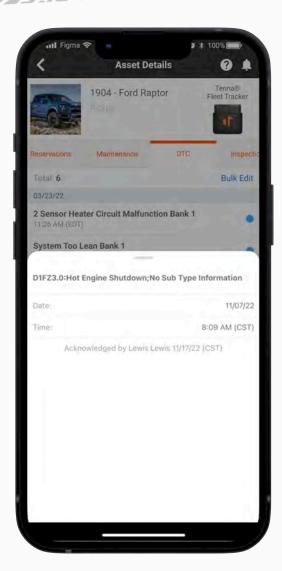
Maintenance Needed

☐ Running

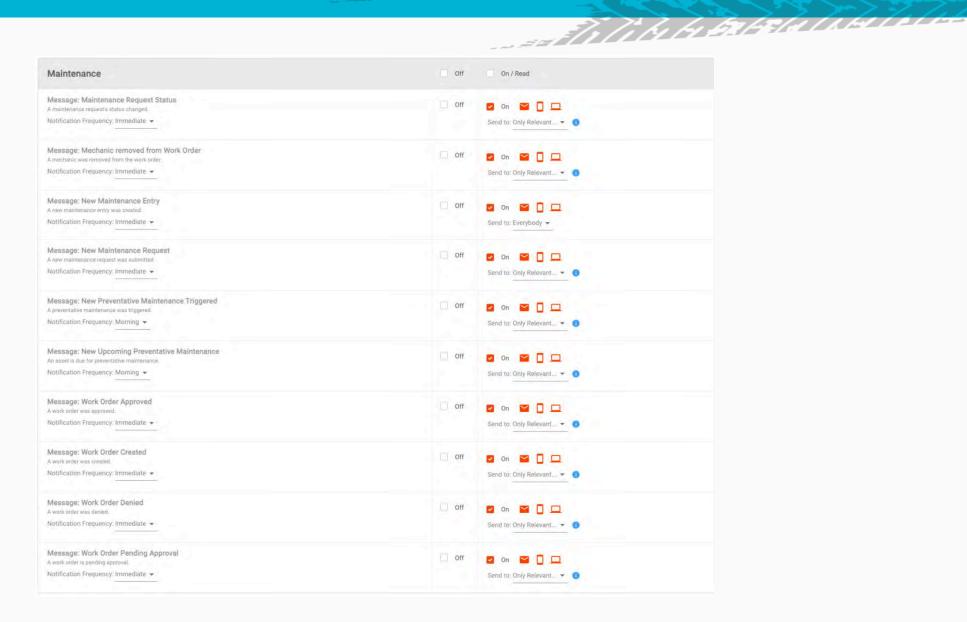
DTC & Fault Codes: View (Mobile)

- On Mobile, DTC & Fault Codes can be viewed and acknowledged from the individual Asset Details page.
- New codes are indicated with a blue bubble and can be acknowledged individually or in bulk.
- Users can view the entire description by tapping on the code.





Maintenance: Notifications



Keep In Touch!

Join the TennaSHOP Group on LinkedIn!

The **TennaSHOP** group on LinkedIn is a place 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



COME SEE US!

AED Summit

January 10-12, 2023 Chicago, IL

Septic-Con

January 26-28, 2023 Tacoma, WA



Time to vote!

We hope you enjoyed this training and learned a lot. We'd love your insight into what we should cover in February 2023.

Take our poll now.

Next Session

Jan. 20: Resource Management + Schedule





