

PREVENTIVE MAINTENANCE

Lesson Plan - March 28, 2023 version

By the end of the *Preventive Maintenance* training session, the client and targeted users will be able to use the **maestro* Preventive Maintenance** sub-module to manage the preventive maintenance for pieces of equipment.

UnitPREVMAIN01 - Preliminary Analysis and Configuration

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
<p>This objective of this session is to clarify the needs, requirements, and basic configurations linked to using the maestro* Preventive Maintenance sub-module.</p> <p><i>PREREQUISITES</i></p> <ul style="list-style-type: none">• <i>Project Management;</i>• <i>Security Management;</i>• <i>Work Orders.</i> <p><i>OPTIONAL PREREQUISITES</i></p> <ul style="list-style-type: none">• <i>Document Management;</i>• <i>Catalogue Management;</i>• <i>Depreciation Book;</i>• <i>Resource Management.</i>	<ul style="list-style-type: none">• Analysis;• Configuration (Preventive Maintenance).	<ul style="list-style-type: none">• Discussion on the current and future preventive maintenance process (strengths and weaknesses);• Set up of the required configurations for the implementation;• Make decisions. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none">• <i>Reflect on the discussions.</i>	1h	<ul style="list-style-type: none">• Training document PREVMAIN01¹	Pilot

¹This training document is under development.

UnitPREVMAIN02 - Specific Settings Linked to Maintenance

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this session, the client a designated users will be able to define and set up the necessary parameters to manage preventive maintenances in maestro *.	<ul style="list-style-type: none"> • Equipment Management; • Define Equipment Types; • Define Usage Meter Types; • Define Priority Codes; • Define Tasks; • Define Maintenance Types and Tasks; • Define Locations; • Define Fuel Codes. <p><i>NOTE: The time required to perform the different settings can vary according to the client's needs.</i></p>	<ul style="list-style-type: none"> • Review of previous notions and validation of completed tasks as homework; • Explanation and completion of the different preventive maintenance management windows, according to the needs of the client and software prerequisites, to automate data entry. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> • Finalize data entry. 	3h	<ul style="list-style-type: none"> • Training document PREVMAIN02^I 	Pilot and/or Super Users

^IThis training document is under development.

UnitPREVMAIN03 - Preventive Maintenance I0I

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this session, the client and designated users will be able to set up and use the elements necessary to preventive maintenance and the process.	<ul style="list-style-type: none"> Update settings according to the decisions that have been made; Define Accumulators; Scheduled Maintenance Management; Generate Work Orders; Work Orders (initialization). 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; User training according to the process established at the time of the analysis. Demonstration of the different options and methods to manage maintenances. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Practice entering data and validate discussed processes.</i> 	3h	<ul style="list-style-type: none"> Training document PREVMAIN03^I 	Pilot and/or Super Users

^IThis training document is under development.

UnitPREVMAIN04 - Operational Training on Preventive Maintenance in maestro*

Optional Session - Training of the client's employees with the implementation specialist

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this session, the users will be able to perform the different operations to manage preventive maintenances in maestro .*	<ul style="list-style-type: none">• Update settings according to the decisions that have been made;• Define Accumulators;• Scheduled Maintenance Management;• Generate Work Orders;	<ul style="list-style-type: none">• Review of previous concepts and validation of completed tasks as homework;• User training according to the process established at the time of the analysis;• Demonstration of the different options and methods to manage maintenances. <i>HOMEWORK</i> <ul style="list-style-type: none">• Practice entering data.	3h	<ul style="list-style-type: none">• Training document PREVMAIN04^I	Pilot and/or Super Users and/or Users

^IThis training document is under development.

UnitPREVMAIN05 - Analysis and Inquiry

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this session, the client will be able to use maestro * lists and reports to plan and follow up on preventive maintenances.	<ul style="list-style-type: none"> Scheduled Maintenance List; Hours Comparison Report; Equipment Inquiry; Maintenance and Repair History; List of Maintenance Types and Tasks. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Validate and set up preventive maintenance reports and inquiries. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Validate the accuracy of the data.</i> 	3h	<ul style="list-style-type: none"> Training document PREVMAIN05^I 	Pilot and/or Super Users and/or Users

^IThis training document is under development.

UnitPREVMAIN06 - Form Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson the customer will be able to use the standard maestro* forms defined to meet their needs.	<ul style="list-style-type: none"> Work Orders (regular and PMP maintenance). 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Validate and define changes to be made, if needed, to work order reports (regular and PMP maintenance). <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Validate the accuracy of the forms</i> 	To be Determined		Pilot

UnitPREVMAIN07 - Tests and Validation

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer and designated users will have carried out the tests and verifications to validate the configurations made beforehand, and will be able to attest to the adequacy of these configurations with the established processes.	<ul style="list-style-type: none"> Validate the generation of work orders to allow displaying maintenances due, generated by maestro*. 	<ul style="list-style-type: none"> Review of previous concepts and validation of completed tasks as homework; Test Assistance; Transaction Validations; Validation of reports and consultations; Settings review, if needed; Processes review, if needed. <p><i>HOMEWORK</i></p> <ul style="list-style-type: none"> <i>Complete Integrated Tests.</i> 	1.75h		Pilot and/or Users

UnitPREVMAIN08 - Conclusion

Date:

Time:

Trainer:

Objective	Content	Conduct	Time	Learning Equipment	Targeted Audience
By the end of this lesson, the customer will have shown the necessary knowledge and skills to manage accounts receivable in maestro* .	<ul style="list-style-type: none">• Validate learnings;• Review the security settings applied to the module.	<ul style="list-style-type: none">• Prepare future training sessions according to the deployment plan.	15 min	Acquired competencies form - PREVMAIN^I	Pilot

^IThis training document is under development.