

Maintenance/Repair Posting (ERS500)

The Maintenance/Repair Posting Menu provides the programs that allow you to

- reserve items for a maintenance or repair procedure
- enter items into maintenance/repair
- print a list of items entered in or reserved for maintenance/repair
- release items having completed maintenance/repair
- print and update a register reflecting this processing
- build and print a general ledger distribution.

The **maintenance** flag of the Rental Item File indicates how an item is to be scheduled for maintenance. The schedule can be based on a specific number of days, on a certain measure of distance or usage, or user-defined dates. The Maintenance Schedule Report prints the items due for their next scheduled maintenance.

You enter items scheduled for maintenance or needing repair into the Maintenance/Repair Entry Program. This program allows you to enter items into maintenance/repair immediately, thus making them unavailable for rental or reservation, or reserve items for future maintenance. When reserving items for maintenance/repair, you are indicating they will not be available for rent during a future time period.

You use the Maintenance/Repair Completion Program to release the items and make them available again. The Maintenance/Repair Listing Program prints the items currently in maintenance/repair, or reserved for this procedure. The Maintenance/Repair Register Program completes the process of maintenance/repair by printing a register of all items worked on, by removing the completed records from the Maintenance/Repair Expense File, and by building and printing a general ledger distribution.

The following diagram presents the Maintenance/Repair Posting Menu.

```

                                EQUIPMENT RENTAL
----- MAINTENANCE/REPAIR POSTING -----
01-DEMO COMPANY                                                    ERS500

                                1. MAINTENANCE/REPAIR ENTRY
                                2. MAINTENANCE/REPAIR LISTING
                                3. MAINTENANCE/REPAIR COMPLETION
                                4. MAINTENANCE/REPAIR REGISTER

                                SELECTION
                                ENTER SELECTION #, ACCESS CODE, 'OFF', DOWN ARROW, UP ARROW, F4-PREVIOUS MENU

```

Maintenance/Repair Entry (ERE510)

Function

This program allows you to enter items into a maintenance or repair procedure, or reserve them for this type of processing. Items are not available for rental or reservation until you use the Maintenance/Repair Completion Program to release them. The program's features include allowing a search on items needing maintenance and displaying detailed scheduling information.

User Inputs

The following inputs are involved in entering an item into maintenance/repair:

1. Warehouse

Enter the warehouse for the item requiring maintenance. CR defaults to the warehouse assigned to the terminal. F2 allows a search (ref. #19).

2. Item

Enter the item number to enter into or reserve for maintenance. You have the following options:

F2 - allows a search of all rental items (ref. #19).

F3 - allows a search of rental items in maintenance, reserved for maintenance, or having completed maintenance.

3. Equipment

Enter the equipment number requiring maintenance. This input is available for serial items only; the system supplies NONSERIAL in this input for nonserial items.

4. Units

Enter the number of units requiring maintenance. This input is displayed for nonserial items only.

5. Code

Enter a valid code describing the maintenance or repair to be performed. F2 allows a search of codes defined in the Maintenance/Repair Code File.

6. Status

Indicate whether you are E (entering the item into maintenance) or R (reserving the item for maintenance). If you choose E, the item becomes immediately unavailable. If you choose R, the item cannot be reserved or rented out during the indicated time period.

7. Beginning date and time

Enter the day and time that the item goes into maintenance (ref. #6 and #21). If you entered E in the previous input, the date must be on or before the system date. Press F3 to see scheduling information (ref. #20). CR defaults to the current date and time.

8. Ending date and time

Enter the day and time that maintenance is to be completed for the item (ref. #6 and #21). Press F3 to see scheduling information (ref. #20). CR defaults to the next day.

9. Memo

Enter up to 3 lines of memos (up to 60 characters each). You can use these lines for special instructions or other information needed for maintenance. They are printed on the Maintenance/Repair Listing.

10. CR-accept entry, F4-backup

Press CR to enter or reserve the item if all information is correct. The system returns to input #2 so you can enter more items. Otherwise, use F4 to back up to change the incorrect input.

Changing Maintenance/Repair Entries

You can delete entries from maintenance/repair. And, if you entered R (reserved) in the status input, you can change the entry to E (entered) so that the item enters maintenance immediately. Follow these steps to do either one:

1. Use F3 (search of items in maintenance) at the item input and choose the item to change. The entry for the item is displayed.
2. Change the entry with one of these options:
 - D - to delete the entry
 - F3 - to change the status of the entry along with the beginning and ending dates.

Summary of File Activity

Upon entry the item record is added to the Scheduling File (ERSCHD) and the Maintenance/Repair Expense File (ERMAIN). The status of the item number is set to M (maintenance) in the Equipment File (EREQIP), and the total quantity available in the Rental Item File (ERITEM) is reset.

Files Used: ICMAST, ICINTR, ICALPX, ICCLSX, ERCONT, ERRESV, ERITAX, ERDATE

Files Updated: SMCNTL, ERMAIN, ERSCHD, EREQIP, ERITEM

The following diagram presents the Maintenance/Repair Entry Screen with actual FACTS demo data.

01-DEMO COMPANY	MAINTENANCE/REPAIR ENTRY	ERE510
WAREHOUSE 01 ATLANTA WAREHOUSE		

ITEM	I107 PORTABLE FLOOR CRANE	
EQUIPMENT#	3	
CODE	MT NORMAL MAINTENANCE/SERVICE	STATUS RESERVED
BEGINNING:	DATE 10/01/90 TIME 1:50 PM	
ENDING:	DATE 10/02/90 TIME 1:50 PM	
MEMO	1	
	2	
	3	
CR-ACCEPT ENTRY, F4-BACKUP .		

Maintenance/Repair Listing (ERR510)

Function

This program allows you to print a list of the items entered in or reserved for maintenance/repair.

You have the option to

- choose the print order - item, alpha, vendor, or item class order
- select the beginning and ending order choice
- select items by vendor (or item class) to print
- select warehouse(s) to print
- select the maintenance/repair codes
- specify the beginning and ending dates
- select the status to print - entered or reserved.

Report information includes

- item number
- equipment number
- item descriptions
- status in maintenance
- maintenance/repair code
- code description
- beginning dates
- expected ending dates
- entry memos

The report ends with the number of items listed.

User Inputs

The following inputs are involved in printing the Maintenance/Repair Listing:

1. **Order**

Indicate whether the report is to print items in order of **I** (rental item number), **A** (alpha key), **V** (vendor), or **C** (item class). CR defaults to **I**.

2. **Beginning order choice**

Select the beginning order choice to print (ref. #2).

3. **Ending order choice**

Select the ending order choice to print (ref. #8).

4. **Vendor/Item class**

Enter the vendor (or item class if vendor was selected in input #1) to print. The entry must be a valid vendor (or item class). CR defaults to **ALL**.

5. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only items assigned to the warehouse in the Rental Item File will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

6. Maintenance/Repair Code

Enter up to twelve 2-character maintenance/repair codes side by side to print. Only items with these codes will print. Each entry must be a valid code as defined in the Maintenance/Repair Code File. CR defaults to ALL.

7. Beginning date

Enter the beginning date to print. Only items in maintenance between the beginning and ending dates are printed. CR defaults to FIRST (that is, the first date with a scheduled maintenance).

8. Ending date

Enter the ending date to print. Only items in maintenance between the beginning and ending dates are printed. CR defaults to LAST (that is, the last date with a scheduled maintenance).

9. Status

Indicate whether to print the report for E (items entered in maintenance) or R (items reserved for maintenance). CR defaults to ALL.

Summary of File Activity

Printing proceeds by reading through the Rental Item File (ERITEM) and building a temporary sort file (SMSRT#) based on the order selected. The Maintenance/Repair Expense File (ERMAIN) is then checked for the item records meeting the criteria entered.

Files Used: SMCNTL, ERMAIN, ICMAS, ERITAX, APVEND, ERITEM

Files Updated: SMSRT#

The following diagram presents the Maintenance/Repair Listing Screen with actual FACTS demo data.

01-DEMO COMPANY	MAINTENANCE/REPAIR LISTING	ERR510
ORDER I		
BEGINNING ITEM FIRST		
ENDING ITEM LAST		
VENDOR ALL		
WAREHOUSE 01 ATLANTA WAREHOUSE		
MAINTENANCE/REPAIR CODE ALL		
BEGINNING DATE FIRST		
ENDING DATE LAST		
STATUS ALL		
END OF INPUTS. CR-CONTINUE, F4-BACKUP .		

Maintenance/Repair Completion (ERE520)

Function

This program allows you to release items from maintenance/repair once they are completely repaired or fully maintained. The items are then immediately available for rent.

User Inputs

The following inputs are involved in completing maintenance/repair for an item:

1. **Warehouse**

Enter the warehouse for the item. CR defaults to the warehouse assigned to the terminal. F2 allows a search (ref. #19).

2. **Maintenance/repair search**

The system displays the search routine, so you can search for items in maintenance. Enter the line number of the item to complete. The system supplies the rest of the screen with the information entered during the Maintenance/Repair Entry Program.

3. **Actual ending date and time**

Enter the date and time that the maintenance was actually completed (ref. #6 and #21). CR defaults to the current date and time.

4. **Expense**

Enter the expense amount of the maintenance or repair. Through the Maintenance/Repair Register, this amount is posted to the life-to-date maintenance or repair cost in the Equipment File. CR defaults to 0.

5. **Completion memo**

Enter a memo of pertinent information regarding the maintenance/repair (up to 60 characters). This memo is printed on the Maintenance/Repair Register.

6. **Ending readings**

This input is skipped for nonserial items. If the equipment item is charging for or tracking distance, usage, or fuel, you must enter the reading(s) as the item leaves maintenance. CR defaults to the current reading(s).

7. **CR-accept entry, F4-backup**

Press CR to accept the entry if all information is correct. The system returns to input #2, so you can enter more items. Otherwise, use F4 to back up to change the incorrect input.

Summary of File Activity

The status of the maintenance record is updated from E (entered) or R (reserved) to C (completed) in the Maintenance/Repair Expense File (ERMAIN). In the Equipment File (EREQIP), the distance or usage readings are updated along with life-to-date maintenance or repair costs and last maintenance date. The quantity available for rent is updated in the Rental Item File (ERITEM) and the Equipment File. A maintenance or repair transaction is logged in the Equipment Transactions File (ERTRAN), and the item record is removed from the Scheduling File (ERSCHD).

Files Used: SMCNTL, ICMAS, ICINTR, ICALPX, ICCLSX, ERCONT, ERRESV, ERITAX

Files Updated: ERMAIN, ERSCHD, EREQIP, ERITEM, ERTRAN

The following diagram presents the Maintenance/Repair Completion Entry Screen with actual FACTS demo data.

01-DEMO COMPANY	MAINTENANCE/REPAIR COMPLETION ENTRY	ERE520
WAREHOUSE 01 ATLANTA WAREHOUSE		

ITEM	I107 PORTABLE FLOOR CRANE	
EQUIPMENT#	3	
CODE	MT NORMAL MAINTENANCE/SERVICE	
BEGINNING: DATE	09/21/90	TIME 11:21 AM
EXPECTED ENDING: DATE	09/22/90	TIME 11:21 AM
ACTUAL ENDING: DATE	10/01/90	TIME 1:55 PM
EXPENSE	.00	
COMPLETION MEMO		
LAST READING: USAGE	273	
CR-ACCEPT ENTRY, F4-BACKUP .		

Maintenance/Repair Register (ERR520)

Function

This program allows you to

- print a Maintenance/Repair Register of all items that have completed maintenance/repair
- build and print a general ledger distribution
- remove completed records from the Maintenance/Repair Expense File.

Report information includes

- item number and description
- equipment number
- maintenance repair code and description
- number of units
- beginning and ending dates
- entry memo
- completion memo
- expense amount

Expense totals are given by warehouse and for the report. The report ends with the number of items listed.

User Inputs

The following inputs are involved in printing and updating the Maintenance/Repair Register:

1. Order

Indicate whether the register is to print items in order of I (rental item number), A (alpha key), V (vendor), or C (item class). CR defaults to I.

2. Beginning order choice

Select the beginning order choice to print (ref. #2).

3. Ending order choice

Select the ending order choice to print (ref. #8).

4. Vendor/Item class

Enter the vendor (or item class if vendor was selected in input #1) to print. The entry must be a valid vendor (or item class). CR defaults to ALL.

5. Warehouse

Enter up to twenty 2-character warehouse codes side by side to print. Only items assigned to the warehouse in the Rental Item File will print. Each entry must be a valid warehouse as defined in the ER Warehouse Control File. CR defaults to the warehouse assigned to the terminal, and F3 defaults to ALL.

6. Maintenance/repair code

Enter up to twelve 2-character maintenance/repair codes side by side to print. Only items with these codes will print. Each entry must be a valid code as defined in the Maintenance/Repair Code File. CR defaults to ALL.

7. Beginning date

Enter the beginning date to print. Only items having completed maintenance between the beginning and ending dates are printed. CR defaults to FIRST (that is, the first date with a completed maintenance).

8. Ending date

Enter the ending date to print. Only items having completed maintenance between the beginning and ending dates are printed. CR defaults to LAST (that is, the last date with a completed maintenance).

9. Date

Enter the register date (ref. #6); this date determines to which period to post to GL. The date must be in the current or next GL period and not prior to the current ER period. CR defaults to the system date.

GL period

If the date entered above is within the current GL period, then CURRENT GL PERIOD is displayed. If the date entered above is within the next GL period, then NEXT GL PERIOD is displayed.

10. End of inputs

(ref. #7)

The Maintenance/Repair Register is printed. If you are printing the GL distribution, the following input is displayed:

11a. Check register. OK to print GL distribution?

After printing the register, **verify the print out**. If there is a correction to be made, enter N to exit the program. After the correction is made, you can rerun the register. If everything is correct, enter YES to continue. The program then prints the GL distribution. Once the GL distribution is printed, proceed to input #12.

If you are **not** printing the GL distribution, the following input is displayed:

11b. Check register. OK to update?

After printing the register, **verify the print out**. If there is a correction to be made, enter N to exit the program. After the correction is made, you can rerun the register. If everything is correct, enter YES to continue and no GL distribution will be printed, the following input (#12) is skipped, and the program proceeds with the update.

12. Check GL distribution. OK to update?

After printing the GL distribution, **verify the print out**. If everything is correct, enter **YES** to continue. The program proceeds with the update. If there is a correction to be made, enter **N** to exit the program. After the correction is made, you can begin the entire register process again.

Summary of File Activity

The Maintenance/Repair Expense File (ERMAIN) is read to print the Maintenance/Repair Register. The GL Distribution File (SMGLD#) is built to print the GL distribution. Once the register is updated, completed records are removed from ERMALN. The GL update updates the GL Journal File (GLJRNL) and the Journal Sort File (GLJRNX).

Files Used: ICMAS, ERITAX, APVEND, GLMSTR

Files Updated: SMCNTL, ERMALN, SMSRT#, ERITEM, SMGLD#, GLJRNL, GLJRNX

The following diagram presents the Maintenance/Repair Register Screen with actual FACTS demo data.

```

01-DEMO COMPANY                MAINTENANCE/REPAIR REGISTER                ERR520
                                ORDER I                                ER CP=09/90 SEP
                                BEGINNING ITEM FIRST                    GL CP=09/90 SEP
                                ENDING ITEM LAST
                                VENDOR ALL
                                WAREHOUSE 01 ATLANTA WAREHOUSE
                                MAINTENANCE/REPAIR CODE ALL
                                BEGINNING DATE FIRST
                                ENDING DATE LAST
                                DATE SYSTEM DATE 09/15/90  CURRENT GL PERIOD
                                END OF INPUTS.  CR-CONTINUE, F4-BACKUP .

```