

Version 25



Trapeze

Enterprise Asset Management

PM Credit Process

Reference Guide

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Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

PM Credit and EQ Downtime Tracking- Reference Guide

Version 25.x

February 2025

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1. Overview

PM Credit can be used to extend the due date for a PM service or inspection scheduled to be performed. PM services are often set up and scheduled on the basis that an equipment unit will be in service for a certain number of days before the PM service is performed. To accommodate this, the system tracks the days an equipment unit is out of service then gives the user the option to apply these days out of service to the PM schedule date, extending it by the accumulated number of days the unit spent out of service.

Abbreviations

The following abbreviations may be used throughout this guide.

Abbreviation	Description
DT	Date and Time
OOS	Out of Service
PM	Preventative Maintenance
SLA	Service Level Agreement
WO	Work Order
NEXT DUE	Status on EQ_PM_EXTEND Table
LAST DUE	Status on EQ_PM_EXTEND Table
PRIOR	Status on EQ_PM_EXTEND Table

2. PM Credit Process

Days out of service tracking

The number of days out of service tracking for an equipment unit is used to determine how long an equipment unit has been out of service since the last PM. The days out of service are tracked in the EQ_DOWNTIME table within the system and these rows are created based on changing of the SLA_STATUS on a vehicle that denotes whether the vehicle is in service or out of service.

Equipment Downtime Tracking

The following information explains what creates the values on the equipment downtime tracking table that are later used to determine how long the equipment unit has been out of service.

1. SLA changes from IN SERVICE or WORK FINISHED to anything else generates a new row. If the start datetime falls into the date range of an existing EQ_downtime row for the equipment unit, no row will be generated.
2. SLA changes from anything else to IN SERVICE or WORK FINISHED generates a new row. If the start datetime falls into the date range of an existing EQ_downtime row for the equipment unit, no row will be generated. If an EQ_downtime row does not exist, a new one will be generated with START/END datetimes set to the same value.



Note: The days out of service calculation always rounds down, so 23 hours and 59 minutes will display as 0 days out of service.



Note: Work order generated EQ_DOWNTIME rows will use the date/time unit in for the start and the in service for the end date/time.

3. SLA changes on any component or equipment with components will propagate throughout the entire component tree.
4. Equipment screen SLA changes
 - i. Source - EQUIPMENT MASTER
 - ii. Date and Time - Current date and time is used.
5. Work Order Open or updated to OPEN
 - i. Source - WORK ORDER OPEN

- ii. Date and Time Start – Date/time out of service if available, otherwise datetime in.
- 6. Work Order Service Status SLA
 - i. Source - WORK ORDER SERVICE STATUS.
 - ii. Date and Time Start and End - Equal to the current datetime.
- 7. Work Order Finish / Closing
 - i. Source - WORK ORDER FINISH/CLOSE
 - ii. End Date and Time - Equal to datetime in service, if that is not available then datetime finished.
- 8. Work Order Re-open
- 9. Work Order OPEN editing
 - i. Non-OPEN work orders, any changes in open/close time will not be tracked since the row may have already been used for PM credit.
 - ii. Datetime OOS Modification – Update the EQ_DOWNTIME row if the following conditions are met:
 - a. EQ_DOWNTIME start_datetime is greater than datetime OOS and datetime OOS does not fall between any other EQ_DOWNTIME rows start_datetime and end_datetime range.
 - b. EQ_DOWNTIME start_datetime is less than datetime OOS, start_source = WORK ORDER OPEN and there are no other existing open work orders with an earlier datetime OOS.
- 10. Work Order Delete – Removes Open EQ_DOWNTIME Row.
 -  Note: This only removes the EQ_DOWNTIME row if the equipment SLA status is changed back to Work Finished or In Service. If there are other open work orders, it will not delete the non-ended EQ_DOWNTIME row.
- 11. Equipment Status Change
 - i. Source - EQUIPMENT STATUS CHANGE
 - ii. Date and Time - Set to current datetime.
- 12. Work Order Delay – Transfer

- i. Source - WORK ORDER DELAY
- ii. Date and Times - Set to current datetime.

13. Component Install

- i. Source - COMPONENT INSTALLED
- ii. Date and Times chosen from the following:
 - a. Posting date is equal to datetime in then use datetime_in.
 - b. Posting date is later than datetime in and less then today use posting "date 00:00".
 - c. Posting date is equal to today then use current date and time.

14. Component-Removal

- i. Source – COMPONENT REMOVED
- ii. Date and times chosen from the following:
 - a. Posting date is equal to datetime in then use datetime_in.
 - b. Posting date is later than datetime in and less then today use posting "date 00:00".
 - c. Posting date is equal to today then use current date and time.

15. Work order un-opened

- i. Source - WORK ORDER UN-OPEN

PM Credit Extension

If equipment is out of service for an extended period, the PM schedule does not change. There are some services, however, for which extending the next due date is appropriate if the equipment is non-operational for many consecutive days. The **PM Schedule Out of Service Extension** screen displays information about PM schedule extensions for equipment. If a service is eligible for an extension, this screen enables you to apply credits to PM services and inspections.

PM Schedule Out of Service Extension

ADMIN MODE CHANGE REQUEST HELP PREFERENCES MENU

Search Reload Sort Select Filter Select Sort New Copy Delete Edit Save Cancel Export Report

Equipment ID Task ID Status

Basic Info

☐ Eligible for credit
Days out of service
Days out of service to be eligible for extension

☐ Apply extension credit -- for number of days
Date and time applied by

Service information

	Due	Actual
Date		
Meter 1		
Meter 2		

Assignment information

Assigned PM location

Department ID

Department to notify for PM

Once a PM service is eligible, a user can apply the credit which will extend the due date of that PM service determining when the PM service will be next performed. Credits can be applied once per service, per schedule. It is important to note the difference between a service and a schedule. There are three types of schedules: CLASS PM Schedule, INDIVIDUAL PM Schedule, and INSPECTION Schedule.

- INDIVIDUAL PMs that allow OOS that end after the due date (but start prior to due date) are eligible to be used as extension.
- CLASS PMs that allow OOS that end after the due date (but start prior to due date) are eligible to be used as extension.
- INDIVIDUAL PMs that allow OOS that start and end after the due date are not eligible to be used as extension.
- CLASS PMs that allow OOS that start and end after the due date are not eligible to be used as extension.
- The OOS period will only update the NEXT DUE record's days out of service for a PM if the days out of service are longer than the previous OOS period.

✔ **Tip:** To apply the out-of-service days to PM schedules, you need to activate the functionality by placing a check in the **Maintain data to allow for extending PM and inspection schedules based on days out of service** field on the **Data > Equipment Units > Setup > Options** screen. An equipment unit's PM or inspection schedule is updated whenever a work order is closed and YES displays in the **Update PM schedule** field on the applicable **Tasks** tab of the work order screen.

Equipment Units - Setup - Options		ADMIN MODE	CHANGE REQUEST	HELP	PI
Equipment unit setup options					
General Info					
More Info					
Operator Assignment					
Assignment History					
Equipment Count					
More Info					
Prefix characters for automatically generated component equipment IDs				Inflation factor	
☐ Require station location ID for equipment units				Earnings rate	
Require station location ID to match first characters of department ID				Revenue account ID	REQUIRE OPTIONAL NOT REQUIRED
Maximum number of future years for valid equipment year				Depreciation method	STRAIGHT SUM OF BRITISH NONE
☐ Synchronize assigned location changes from parent to attached components					
☐ Synchronize assigned department changes from parent to attached components					
☐ Maintain data to allow for extending PM and inspection schedules based on days out of service					
☐ Calculate expected capital replacement cost using inflation rate					

Updating current PM schedule

An equipment unit's PM or inspection schedule is updated when a work order is closed, or a task has a 'YES' value in the **Update PM schedule** field.



Refer to screen help for PM Schedule Out of Service Extension for additional information about this process.