



Microsoft Dynamics® GP  
**Field Service – Preventive Maintenance**

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# Introduction

When integrated with Service Call Management, you can use Preventive Maintenance to automatically generate service calls for preventive maintenance work, with a minimum of user intervention.

You also can use Preventive Maintenance to complete the following tasks:

- Create a list of preventive maintenance requirements, called a Preventive Maintenance Edit List.
- Track preventive maintenance history on generated, cancelled, and completed preventive maintenance requirements.

This introduction is divided into the following sections:

- [\*What's in this manual\*](#)
- [\*Symbols and conventions\*](#)
- [\*Resources available from the Help menu\*](#)
- [\*Send us your documentation comments\*](#)

## What's in this manual

This manual is designed to give you an understanding of how to use the features of Preventive Maintenance, and how it integrates with the Microsoft Dynamics® GP system.

To make the best use of Preventive Maintenance, you should be familiar with the systemwide features described in the System User's Guide, the System Setup Guide, and the System Administrator's Guide.

Some features described in the documentation are optional and can be purchased through your Microsoft Dynamics GP partner.



To view information about the release of Microsoft Dynamics GP that you're using and which modules or features you are registered to use, choose **Help > About Microsoft Dynamics GP**.

The manual is divided into the following parts:

- [\*\*Part 1, Preventive Maintenance setup\*\*](#), introduces Preventive Maintenance and explains its setup.
- [\*\*Part 2, Transactions and reports\*\*](#), explains how to enter edit lists so that you can generate service calls automatically, and also explains how to use reports to analyze your field service information.

## Symbols and conventions

This manual uses the following symbols and conventions to make specific types of information stand out.

Symbol	Description
	The light bulb symbol indicates helpful tips, shortcuts, and suggestions.
	The warning symbol indicates situations you should be especially aware of when completing tasks.

Convention	Description
<i>Creating a batch</i>	Italicized type indicates the name of a section or procedure.
<b>File &gt; Print</b>	The(>) symbol indicates a sequence of actions, such as selecting items from a menu or a toolbar or pressing buttons in a window. This example directs you to go to the <b>File</b> menu and select <b>Print</b> .
TAB or ENTER	Small capital letters indicate a key or a key sequence.

## Resources available from the Help menu

The Microsoft Dynamics GP Help menu gives you access to user assistance resources on your computer, as well as on the Web.

### Contents

Opens the Help file for the active Microsoft Dynamics GP component, and displays the main “contents” topic. To browse a more detailed table of contents, click the **Contents** tab above the Help navigation pane. Items in the contents topic and tab are arranged by module. If the contents for the active component includes an “Additional Help files” topic, click the links to view separate Help files that describe additional components.

To find information in Help by using the index or full-text search, click the appropriate tab above the navigation pane, and type the keyword to find.

To save the link to a topic in the Help, select a topic and then select the **Favorites** tab. Click **Add**.

### Index

Opens the Help file for the active Microsoft Dynamics GP component, with the **Index** tab active. To find information about a window that’s not currently displayed, type the name of the window, and click **Display**.

### About this window

Displays overview information about the current window. To view related topics and descriptions of the fields, buttons, and menus for the window, choose the appropriate link in the topic. You also can press **F1** to display Help about the current window.

### Lookup

Opens a lookup window, if a window that you are viewing has a lookup window. For example, if the Checkbook Maintenance window is open, you can choose this item to open the Checkbooks lookup window.

### **Show Required Fields**

Highlights fields that are required to have entries. Required fields must contain information before you can save the record and close the window. You can change the font color and style used to highlight required fields. On the **Microsoft Dynamics GP** menu, choose **User Preferences**, and then choose **Display**.

### **Printable Manuals**

Displays a list of manuals in Adobe Acrobat .pdf format, which you can print or view.

### **What's New**

Provides information about enhancements that were added to Microsoft Dynamics GP since the last major release.

### **Microsoft Dynamics GP Online**

Opens a Web page that provides links to a variety of Web-based user assistance resources. Access to some items requires registration for a paid support plan.

### **Customer Feedback Options**

Provides information about how you can join the Customer Experience Improvement Program to improve the quality, reliability, and performance of Microsoft® software and services.

## **Send us your documentation comments**

We welcome comments regarding the usefulness of the Microsoft Dynamics GP documentation. If you have specific suggestions or find any errors in this manual, send your comments by e-mail to the following address: [bizdoc@microsoft.com](mailto:bizdoc@microsoft.com).

To send comments about specific topics from within Help, click the **Documentation Feedback** link, which is located at the bottom of each Help topic.

*Note: By offering any suggestions to Microsoft, you give Microsoft full permission to use them freely.*





# Part 1: Preventive Maintenance setup

This part of the documentation contains procedures and information for setting up and customizing Preventive Maintenance for your business. Setup procedures generally need to be completed only once, but you may refer to this part of the documentation at other times to modify or view existing entries.

The following topics are discussed:

- [Chapter 1, "Setup overview,"](#) introduces Preventive Maintenance and explains important preparatory information.
- [Chapter 2, "Setup in Preventive Maintenance,"](#) explains in more detail how to set up events and schedules within Preventive Maintenance.

# Chapter 1: Setup overview

The setup procedures are organized in an order that ensures proper setup.

This information is divided into the following topics:

- [\*Before setting up Preventive Maintenance\*](#)
- [\*Use the Setup Checklist\*](#)

## Before setting up Preventive Maintenance

Before setting up Preventive Maintenance, complete the setup procedures for Service Call Management, including the following tasks:

- Enter Service Call Management settings.
- Create service types, technicians, and offices.
- Enter problem codes, cause codes, and repair codes.
- Set up item extensions, item site extensions, and customer extensions.
- Set up inventory posting accounts in the Posting Accounts Setup window.

You must complete the setup procedures for your company, currency, accounts, and posting options. You also should set up tax schedules and tax details. For more information, see the System Setup documentation.

If you're using Preventive Maintenance with Multicurrency Management, be sure you've also set up currencies, exchange rate tables, and Multicurrency default entries. For more information, see the Multicurrency Management documentation.

## Use the Setup Checklist

When setting up Preventive Maintenance, either open each setup window and enter information, or use the Setup Checklist window (**Microsoft Dynamics GP menu > Tools > Setup > Setup Checklist**) as a guide. See the System Setup Guide (**Help > Printable Manuals**) for more information.



## Chapter 2: Setup in Preventive Maintenance

You can set up your Preventive Maintenance default preferences, such as individual preventive maintenance events and preventive maintenance schedules.

When you set up Preventive Maintenance, you can open each window and enter information or you can follow the Setup Checklist, which you can use as a guide to the setup process. See [Use the Setup Checklist](#) on page 7.

This information is divided into the following topics:

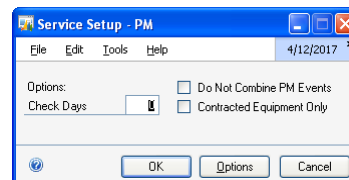
- [Set up Preventive Maintenance default entries](#)
- [Set up preventive maintenance events](#)
- [Set up preventive maintenance schedules](#)
- [Assign preventive maintenance schedules to items](#)
- [Update customer and item extensions](#)
- [Calculate Preventive Maintenance schedules](#)

### Set up Preventive Maintenance default entries

You can set up default entries that affect the preventive maintenance requirements you enter. To accelerate the entry process, specify common entries that will appear automatically when you enter preventive maintenance requirements. For more information, see [Set up preventive maintenance events](#) on page 10 and [Set up preventive maintenance schedules](#) on page 10.

You also can set up document security options. To prevent users from deleting certain documents, while still allowing them to access the window to view or update documents, set passwords. If you set up a password, users are required to enter the password before deleting the select document type. If an option is selected, but a password hasn't been set up, anyone who has access to the window is able to delete the applicable document type.

1. Open the Service Setup–PM window.  
**Microsoft Dynamics GP menu > Tools > Setup > Project > Service Setup > PM button**



2. Enter the number of days to be added to the user date. This number determines the time period to check for preventive maintenance requirements in the Preventive Maintenance Generation routine.
3. Select whether to generate separate or combined service calls for preventive maintenance events.
4. Select whether to generate preventive maintenance events only for contracted equipment.
5. Click **Options** to select document security settings.

6. To allow users to delete or cancel certain document types, select **Allow**. To remove the right for users to delete certain document types, clear the option.
7. To set up passwords, enter a password for each document type.
8. Click **OK**.

## Set up preventive maintenance events

You can set up the preventive maintenance events that you provide for your customers. You also can define default parts, labor, and additional charges that might be used on those events. When you set up an event, it is scheduled for one occurrence. To create a maintenance schedule, combine events.

1. Open the P.M. Event Maintenance window.  
**Cards > Preventive Maintenance > P.M. Events**

2. Enter or select a code to represent an event.
3. Select a line type and enter line items that will appear on service requests that are created from this event.

When you select each line type, the lower portion of the window will change to display the items entered for this event.

4. Click **Save**.

## Set up preventive maintenance schedules

You can set up maintenance schedules by combining the events that might be used for a single item. The schedule also defines how often an event occurs.

You can assign one of the two Preventive Maintenance types, floating or fixed, to each event on a schedule.

**Floating** The next preventive maintenance requirement is generated based on the actual completion date of the previous occurrence of that event.

**Fixed** The next preventive maintenance requirement is generated based on the date the previous occurrence of that particular event should have been generated.

For example, assume that an event that was set up to occur every six months should have been completed on January 1, but actually was completed on January 12. If the event was floating, the next occurrence would be July 12. If the event was fixed, the next occurrence would be July 1.

The **PM Type** field works with the **Type**, **Value**, and **Frequency** fields to determine when, and how often, a preventive maintenance requirement is generated for an event.

A frequency of **At** indicates that the event will occur only one time in the life of the schedule. A frequency of **Every** indicates that the event is recurring throughout the life of the schedule, based on the **Type** and **Value** fields.

The **Value** field indicates the amount of time that must pass or the actual usage that must occur before the preventive maintenance requirement is generated.

The **Type** list represents the basis for the kind of preventive maintenance requirement that is generated. You can select periods of time or meters so that requirements can be created based on actual usage, such as mileage.

1. Open the P.M. Schedule Maintenance window.  
**Cards > Preventive Maintenance > P.M. Schedule**

Event	PM Type	Frequency	Value	Type
HDTV-100	Fixed	Every	3.00	Months
HDTV-200	Fixed	Every	3.00	Months
HDTV-300	Fixed	Every	3.00	Months
HDTV-400	Fixed	Every	3.00	Months
			0.00	

2. Enter or select a code to represent the schedule being created.
3. Enter or select a default service type for this schedule. Any service calls generated for the schedule will use this service type.
4. Enter or select the preventive maintenance events that make up the schedule.
5. Select a **PM Type**, **Frequency**, **Value**, and **Type**.
6. Print the schedule, then click **Save**.

## Assign preventive maintenance schedules to items

You can assign a default preventive maintenance schedule to an inventoried item. Then, you can assign the default preventive maintenance schedule for the item to an equipment record, using the **Default** button in the Equipment PM Schedule window. When you create new equipment records, corresponding preventive maintenance schedules will be created automatically.

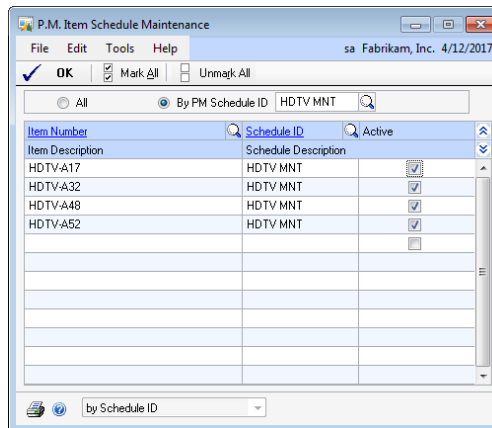
1. Open the P.M. Schedule Maintenance window.  
**Cards > Preventive Maintenance > P.M. Schedule**

Event	PM Type	Frequency	Value	Type
HDTV-100	Fixed	Every	3.00	Months
HDTV-200	Fixed	Every	3.00	Months
HDTV-300	Fixed	Every	3.00	Months
HDTV-400	Fixed	Every	3.00	Months
			0.00	

2. Select the schedule you'll be assigning items to.
3. Click Assign. The Assign P.M. Schedule to Items window opens.



4. Enter either a range of items to assign to the schedule, or select a range of classes to assign all items in the class to the schedule. Click Process, the P.M. Item Schedule Maintenance window opens.



5. Select the **Active** option to indicate that the assigned schedule should be used k. I'll comwith the item. You can also click Mark All to select all items listed.



*You can limit the items shown by choosing PM Schedule ID and selecting a schedule, or view all items in the window.*

6. Click **OK**.

## Update customer and item extensions

The customer extensions and item extensions windows contain information that is used specifically for the Field Service Series. This information must be entered for preventive maintenance requirements to be created successfully.

**To update customer extensions:**

1. Open the Customer Extensions window.  
**Cards > Service Call Management > Extensions > Customer or Cards > Sales > Addresses > Select a customer and an address ID > Additional > Service Extensions**

2. Select a **Customer ID** and an **Address ID**. Change any information if necessary.
3. Select the **Allow PMs** check box to indicate that preventive maintenance service call requirements might be generated for the customer. If the customer record is not selected to allow preventive maintenance to be performed, no preventive maintenance requirements are created for this customer.
4. Select the **Annual PM Month** and **Day** fields to set the customer's preferences for when preventive maintenance events are performed.
5. Select the month that the customer prefers to receive annual preventive maintenance service calls from the **Annual PM Month** list.
6. Enter the day that the customer prefers to receive monthly preventive maintenance service calls in the **Day** field.
7. Click **Service Hours** to enter the customer's preferred service time.
8. Click **Save**.

**To update item extensions:**

1. Open the Item Extensions window.  
**Cards > Service Call Management > Extensions > Item**

2. Select an item number.
3. Select the **Allow PMs** option. If the item record is not selected to allow preventive maintenance to be performed, no preventive maintenance requirements are created for the item.
4. Click **Save**.

**Calculate Preventive Maintenance schedules**

Preventive maintenance events can have a frequency value and type. For example, when you set up a preventive maintenance event, the install date from the serial master record is used if the **PM Month** and **PM Day** fields are blank. Otherwise the **PM Month** and **PM Day** values are used to calculate the **PM Date** value.

For subsequent preventive maintenance events, **Floating PM Types** use the completion date and **Fixed PM Types** use the **PM Date** from the Serial PM History record.

--Frequency--									
PM Type	Value	Type	J	15	F	M	A	15	M
Fixed	3	mo.	X	Y			Z		
Floating	3	mo.	X	Y				Z	

X = First preventive maintenance event is based on the **PM Month** and **PM Day** fields (if populated) or **Install Date** from the Serial Master record.

Y = The preventive maintenance service call completion date.

Z = The preventive maintenance date for the next preventive maintenance event.

Preventive maintenance events with a type of "At" create only a single preventive maintenance event. No subsequent Preventive maintenance events are generated for this type of preventive maintenance event.

For the first preventive maintenance event (no Equipment PM History record), if the **PM Month** and **PM Day** fields are blank, the install date is used as the "base date." If the **PM Month** and **PM Day** are populated, the "base date" is set to the PM Month, PM Day, and the year from the install date.

A preventive maintenance event is due when the "base date" plus the event frequency is between the "User Date" and the "Check Date." This guarantees that a preventive maintenance service call will not be generated for a previous date even if the **Install Date** is used and it is set to an old date, such as 2001.

The process of generating a preventive maintenance program will bump the date accordingly until the next preventive maintenance event due is current based on "User Date" and "Check Date." All of the following examples are for first preventive maintenance events (no Equipment Preventive Maintenance History records exist).

#### Example 1:

- User Date – 3/5/07
- Check Date – 4/30/07
- PM Month – blank
- PM Day – blank
- Install Date – 1/1/07
- Event frequency – 3 months

A preventive maintenance event would be generated for 4/1/07.

**Example 2:**

- User Date – 3/5/07
- Check Date – 3/31/07
- PM Month – blank
- PM Day – blank
- Install Date – 1/1/07
- Event frequency – 3 months

No preventive maintenance event would be generated because the next preventive maintenance event is not due until 4/1/07 and that date is greater than 3/31/07.

**Example 3:**

- User Date – 4/5/07
- Check Date – 4/31/07
- PM Month – blank
- PM Day – blank
- Install Date – 1/1/07
- Event frequency – 3 months

No preventive maintenance event would be generated because the next preventive maintenance event is not due until 7/1/07 and that date is greater than 4/31/07. A preventive maintenance event should have been performed on 4/1/07, but because the user date is 4/5/07, no preventive maintenance event would be generated.

**Example 4:**

- User Date – 5/2/07
- Check Date – 5/31/07
- PM Month – 2
- PM Day – 3
- Install Date – 1/1/01
- Event frequency – 3 months

A preventive maintenance event would be generated for 5/3/07 because the **PM Month** field is set to 2 (February) and the **PM Day** field is set to 3.

For all subsequent preventative maintenance events, the most recent PM serial history record will continue to be used for the specific event to retrieve the base dates. The **PM Date** (field with this name on the Equipment Entry – PMs window accessed from the **PM History** button on the Equipment Maintenance window) is accessible by users so that they can change the date for load balancing of Fixed type preventive maintenance events.

For fixed events, the PM Date (the ETA date of the last preventive maintenance service call for that event) is used to determine the next preventive maintenance event (after the 1st). For floating events, the Call Date (the completion date of the last preventive maintenance service call for that event) is used to determine the next preventive maintenance event (after the 1st).





## Part 2: Transactions and reports

Use the procedures described in these topics to create edit lists and generate service calls within Preventive Maintenance.

Detailed information about your field service operations and activities is stored within Preventive Maintenance. There may be times when you need information about a specific transaction or general information about a group of service calls.

Use these reports to analyze preventive maintenance activity and pinpoint any errors. You can print reports using the Preventive Maintenance Reports menu.

The following topics are discussed:

- [Chapter 3, “Edit lists and service calls,”](#) explains how to create and print the Preventive Maintenance Edit List and how to generate Preventive Maintenance service calls from that edit list.
- [Chapter 4, “Reports,”](#) explains how to use reports to analyze your preventive maintenance activities.



## Chapter 3: Edit lists and service calls

You can generate edit lists and service calls. You also can select specific preventive maintenance requirements within the Preventive Maintenance Edit List and generate service calls from those requirements.

This information is divided into the following topics:

- [\*Generate a Preventive Maintenance Edit List\*](#)
- [\*Generate Preventive Maintenance service calls\*](#)

### Generate a Preventive Maintenance Edit List

You can print a Preventive Maintenance Edit List for items that are used by your company or by customers, and that are allowed to generate preventive maintenance service calls. The Preventive Maintenance Edit List is a report that contains reminders that a particular item is ready to be maintained, based on the passage of time or usage described in the item's Preventive Maintenance Schedule.

The default **Generate Up To** date is calculated by adding the **Check Days** from Preventive Maintenance Setup to the current user date. Only the requirements that should be created between the user date and the **Generate Up To** date are added to the Preventive Maintenance Edit List.

Use the Generate PM Edit List routine to generate the Preventive Maintenance Edit List.

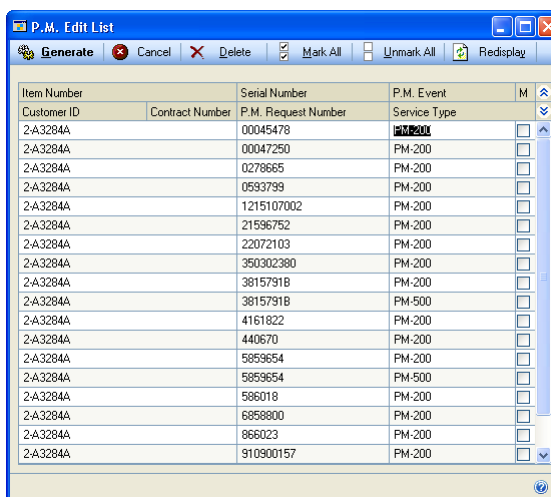
1. Open the Generate PM Edit List window.  
**Microsoft Dynamics GP menu > Tools > Routines > Preventive Maintenance > P.M. Generation**

2. Enter or select the restriction criteria that appear on the Preventive Maintenance Edit List based on any combination of item number, preventive maintenance schedule, customer number, or equipment number.
3. Enter or accept the default **Generate Up To** date.
4. Click **Generate**.

## Generate Preventive Maintenance service calls

The Preventive Maintenance Edit List shows all preventive maintenance requirements that are ready to be turned into service calls, based on the parameters established on the Preventive Maintenance Schedules for the items. For more information, see the Service Call Management documentation.

1. Open the P.M. Edit List window.  
**Transactions > Preventive Maintenance > P.M. Edit List**



2. If any preventive maintenance events should be skipped, select them for deletion.

Select the **M** (marked to transfer) check box on each event and click **Delete** to remove them from the window.

3. If any preventive maintenance events never should be transferred to a service call, select them for cancellation.

Select the **M** (marked to transfer) check box on each requirement and click **Cancel** so they will not show up on future edit lists until the next scheduled occurrence for each event.

4. Select the preventive maintenance events to transfer to open preventive maintenance service calls.

Select the **M** (marked to transfer) check box on each event or click **Mark All** to transfer all the selected requirements.

5. Click **Generate** to process all marked preventive maintenance events and generate preventive maintenance service calls.

6. Close this window to print the PM Edit Audit Trail report, which shows the preventive maintenance service calls generated for each piece of equipment.

## Chapter 4: Reports

Use Preventive Maintenance reports to view the preventive maintenance schedules assigned to your items in inventory or to view the preventive maintenance requirements that are ready to be transferred to a preventive maintenance service call. Use this information to help you print reports and select report options.

This information is divided into the following topics:

- [\*Preventive Maintenance report summary\*](#)
- [\*Reports you can use with named printers\*](#)
- [\*Specify a Preventive Maintenance report option\*](#)

For information about creating and printing reports, and the reporting tools that you can use with Microsoft Dynamics GP, see the System User's Guide (**Help > Printable Manuals**).

For information about named printers, see the System Administrator's Guide (**Help > Printable Manuals**).

### Preventive Maintenance report summary

You can print several types of reports within Preventive Maintenance. Some reports are printed automatically when you complete certain procedures. For example, audit trail reports are printed automatically when you generate preventive maintenance service calls. You also can print some reports during procedures. For example, you can print a Preventive Maintenance Event List while entering Preventive Maintenance events in the P.M. Event Maintenance window.

The following table shows the report types available in Preventive Maintenance and the reports included in those categories.

Report type	Report	Printing method
Setup reports	PM Event Code List PM Schedule List PM Item Schedule List	Choose <b>File &gt; Print</b> in the setup windows or click the <b>Printer</b> icon.
Audit reports	PM Edit Audit Trail	Printed automatically when you close the PM Edit List window.
Analysis reports	PM Listing PM Due	Create report options in the Preventive Maintenance Reports windows.

### Reports you can use with named printers

You can assign printers to the following documents and reports:

- Posting journals
- Analysis reports
- Preventive Maintenance cards

## Specify a Preventive Maintenance report option

Report options include specifications for sorting options and range restrictions for a particular report. To print Preventive Maintenance reports, you must first create report options. You can set up each report with different options.



*A single report option can't be used by multiple reports. You must create identical report options separately.*

1. Open one of the Preventive Maintenance report windows.  
**Reports > Preventive Maintenance > PM Listing**
2. Select a report.
3. Click **New**.
4. Enter a name and definition for the option. The name you choose for the option won't appear on the report. The selections available for defining report options vary, depending on the report type you've selected.



*You can enter only one restriction for each restriction type. For instance, you can insert one serial number restriction and one customer ID restriction.*

5. Enter range restrictions. The available ranges vary, depending on the report type you've selected.
6. Insert or remove the ranges for the **Restrictions List**.
7. Choose **Email Options** to enter email options for the report option. Once the email options are set up, you'll be able to send the reports in an email message from this window by choosing Email. You can also send this report in an email from any list view where the report option is displayed.
8. Click **Destination** to select a printing destination. Select **Ask Each Time** to select printing options each time you print this report option.
9. Click **Print**.

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