

Maintenance Plans

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[Maintenance Plan](#)

A maintenance plan ensures that assets (i.e., work centres and tools) are maintained or calibrated in accordance with their specified requirements.

Maintenance Type

Maintenance plans can be configured with a time based logic for both tools and work centres (e.g., must be done every 4 weeks) or use based logic for tools (e.g., must be calibrated every 50 uses). This is defined in the Maintenance Type.

1. Navigate to the **Maintenance & Calibration Plans** page (also accessible from the **Tool Manager** page).
2. Click **New** and complete the **New Maintenance Plan** pop-up.

Create a Maintenance Plan

1. Navigate to the **Maintenance Plan** page and click **New**.
2. Complete the **New Maintenance Plan** pop-up.

New/Edit Maintenance Plan screen

Blue fields in the form are required and are flagged with an asterisk () in this document.*

- **Name***: Name the maintenance plan.
- **Description**: Provide further information about the maintenance plan.
- **Type***: Select a Maintenance Type.
- **Checklist**: If required, select a checklist for this plan. In the future this will enforce the completion of a checklist when you want to complete the maintenance.
- **Frequency Days**: Field displays if the Type selected is time based.
- **Frequency Count**: Field displays if the Type selected is use based.
- **Allow overdue***: Set to Yes if a work centre or tool on this maintenance plan is allowed to be used when it's maintenance or calibration is overdue.

Assign a Maintenance Plan to an Asset

1. Navigate to the **Maintenance & Calibration Plans** page.
2. Select a maintenance plan and click the **Assets** button.
3. Search for a work centre or tool, or filter by **Asset Class** (i.e., work centre, tool), or **Asset Type**.
4. Select the asset and assign/unassign it to the **Maintenance Plan**.

Maintenance Management

You can have multiple maintenance plans set against a tool or a work centre and it can be controlled so that if it's out of its maintenance schedule, you can't use it.

- The **Maintenance Management** screen:
 - Displays maintenance plan status for each work centre or tool.
 - Filters results based on search criteria provided.
 - Shows you a summary of status vs maintenance plan, i.e., time remaining for time based (**Next Maintenance Date** column) and uses remaining for use based (**Remaining Uses** column), with highlights for those within warning limits or overdue.
 - Allows you to record maintenance completion.
 - Provides a history of maintenance.
 - Allows you to override limits if permissions allow.

Record Maintenance Completion

The **Record Maintenance Completion** pop-up records the date, time, and the user who performed the maintenance. Select the Asset Type (work centre or tool) and click **Record Maintenance Completion**. Provide the maintenance date and user.

History

Displays a history of maintenances.

Override

When a tool is on a **Maintenance Plan** with **Allow overdue** set to **No**, it will be blocked from use once it exceeds its count or days limit. The **Override** function can be used to bypass these restrictions. A user with the required permission can temporarily override the limit days or uses for the specific tool or work centre (e.g., if the maintenance time line runs out in the middle of night shift or during a job). When the next maintenance is recorded, the limit reverts back to the standard automatically.

For tools on a plan where **Allow overdue** is set to **Yes**, the Override function is still useful. The tool will appear as a constant red flag in the **Maintenance Management** dashboard if out of maintenance/calibration, even though it remains usable beyond its count or days limit. If you made the decision to let it run beyond its restriction, then using the Override will not report these assets as being out of maintenance/calibration.

An example of where the Override can be used is where a work centre has a weekly maintenance set up with a limit of 7 days. A maintenance is recorded at 12pm on Monday, which means the next one must be recorded before 12pm the following Monday, otherwise the work centre will be blocked. Maintenance is delayed and can only be done on the Monday afternoon, so the override is set to 8 days - this allows the machine to continue to be used up to 8 days as a temporary limit. Once the next maintenance is complete the limit goes back to 7 days.

The **Override** pop-up allows you to manually update tool use data. Fields are:

- **Frequency Count:** The standard limit as defined by the maintenance plan.
 - **Frequency Count Override:** The input field to manually record a new limit to override the standard.
 - **Comment:** It is optional to leave a comment about the override.
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