

Calibration Program Management Solution

Job Aid

CPMSJA009 – Re-schedule CPMS Maintenance Plan

Purpose

A maintenance plan is used to automatically create notifications for tools that need calibration on a regular basis. Plans are scheduled automatically each evening using a batch job. However, if a plan's schedule needs to be adjusted, this can be done manually using transaction **IP10**.

Note that maintenance plans can only be rescheduled on the same logical system they were created for. For example, a plan created on a deployed ship can only be rescheduled on the ship's server by the Fleet Data Manager (FDM).

Below are the most common reasons for needing to re-schedule a plan:

- The STTE has arrived for calibration but the recall notification cannot be found; after ensuring the STTE has an existing maintenance plan, it needs to be rescheduled so a notification is created immediately.

[Click here](#) to proceed to this process flow diagram.

- The calibration has been completed and will be shipped or picked up immediately; the plan needs to be rescheduled to ensure the calibration dates are correct for the delivery slip.

[Click here](#) to proceed to this process flow diagram.

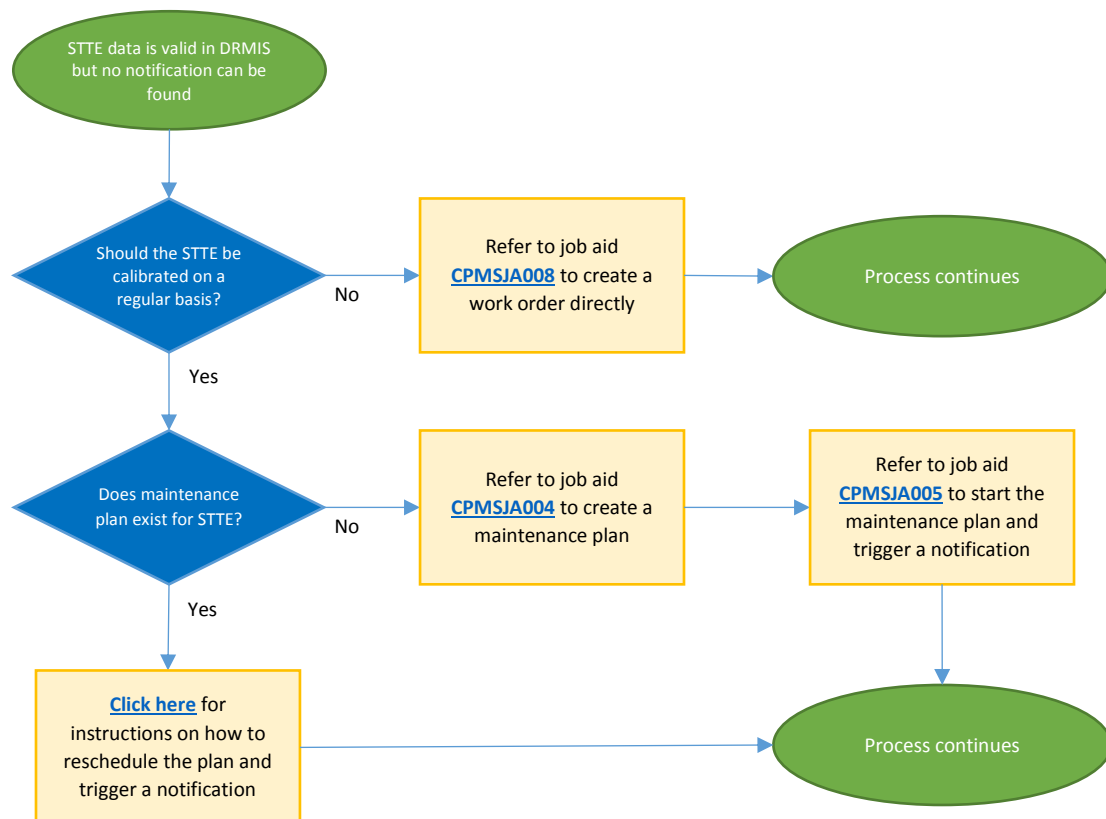
- The next scheduled call on a plan needs to be delayed until a future date.

[Click here](#) to proceed to this process flow diagram.

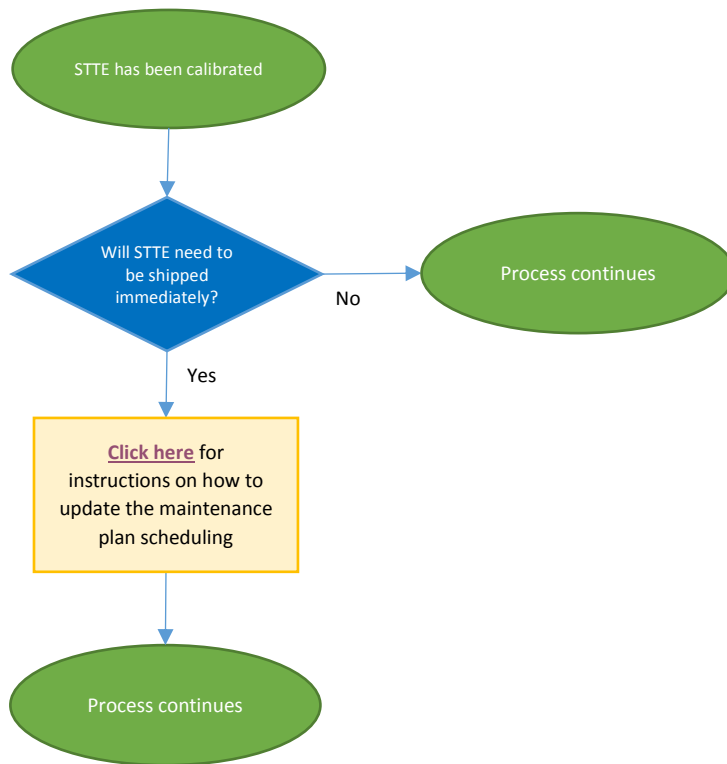
Transaction Code

IP10

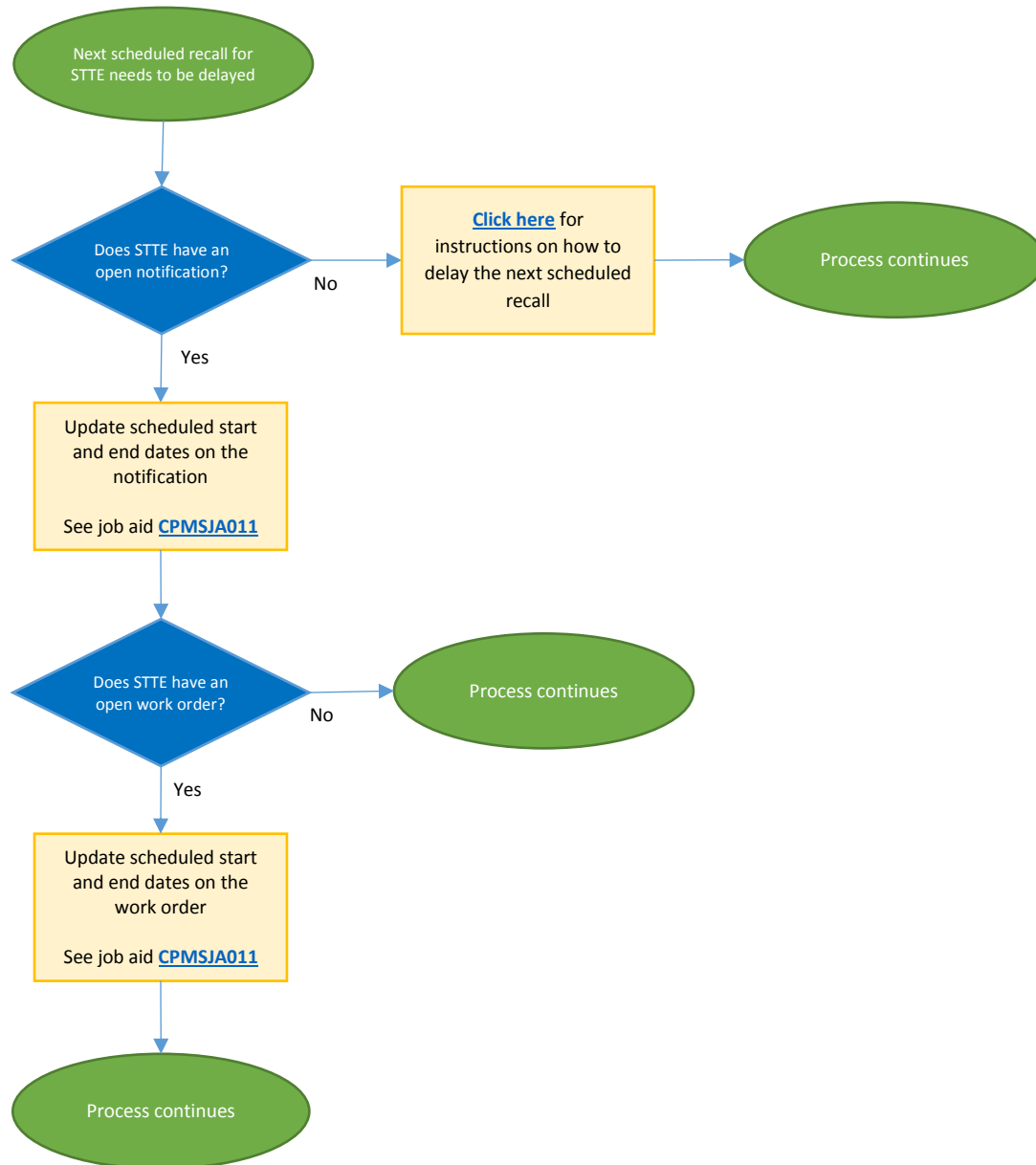
Process Flow – Notification Not Found for STTE



Process Flow – Update Plan for Calibrated STTE



Process Flow – Delay Next Scheduled Recall




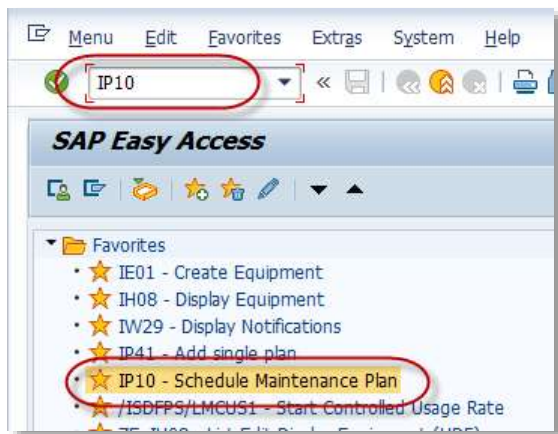
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Procedures

1. Reschedule maintenance plan to create notification(s) immediately

Execute transaction **IP10** by entering it in the *Command Box* and hitting  or by selecting it from your Favorites menu.



The *Schedule Maintenance Plan: Initial* screen is shown.

Schedule Maintenance Plan: Initial

MaintenancePlan

Enter the plan number. Press .

The *Schedule Maintenance Plan* screen is shown.

Schedule Maintenance Plan: Single cycle plan 000010000384

Start: Start in cycle New Start Manual call Schedule overview list

Maintenance plan CPQ FAMILY 10

Scheduled calls Manual calls Maintenance plan scheduling parameters Maintenance plan additional data

Scheduling List

C...	PlanDate	Call date	Completion d...	Scheduling Type / Status	Act. ...	Unit
2	2019.05.27	2019.04.21		Scheduled Hold		

The first call with the status “Hold” will be shown on the top line of the Scheduling List.

Scheduling List					
C...	PlanDate	Call date	Completion d...	Scheduling Type / Status	
2	2019.05.27	2019.04.21		Scheduled Hold	

The call date represents the date that the notification (or notifications, in the case of a family) will be created automatically. This is the call that we want to use to create the notification(s) today.

To re-schedule the plan, click on **New Start**.

The *Scheduling* pop-up window will be shown:

Select **Delete**.

The *Start Date* pop-up window will be shown:

Considering the plan's cycle, enter the date that will cause a recall to be triggered today.

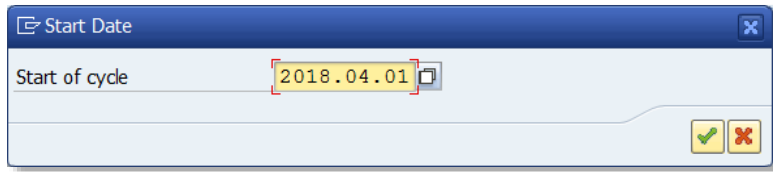


The plan's start date determines when the notification(s) will be created.

Start date + Cycle = Date of first notification

For example, if the cycle is 1 YEAR, set the start date to one year in the past to have the system generate the first notification immediately

In this example, the cycle is **52 weeks** so we set the **Start Of Cycle** date to 52 weeks *in the past*, so the system will create a notification immediately.



Start Date dialog box showing the start of cycle date as 2018.04.01. The date is highlighted in yellow. There are green and red buttons at the bottom right.

Click  when finished.

The scheduling list will be refreshed and the previously-selected line will be replaced with one with scheduling type “New start”.


Scheduling List				
C...	PlanDate	Call date	Completion d...	Scheduling Type / Status
2	2019.03.31			New start Save to call
3	2020.03.29	2020.02.22		Scheduled Hold

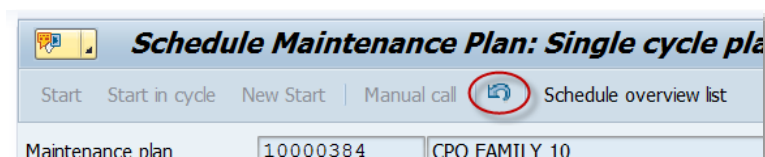
If the correct date was entered, the same line will have the status “Save to call”, which indicates that notifications will be created as soon as the plan is saved.

Scheduling List				
C...	PlanDate	Call date	Completion d...	Scheduling Type / Status
2	2019.03.31			New start Save to call
3	2020.03.29	2020.02.22		Scheduled Hold


A new line is also created which represents the next planned call based on the re-started schedule (i.e. in 52 weeks).

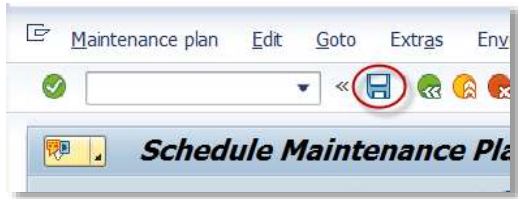
Scheduling List				
C...	PlanDate	Call date	Completion d...	Scheduling Type / Status
2	2019.03.31			New start Save to call
3	2020.03.29	2020.02.22		Scheduled Hold

If the data is not correct, you can abandon the re-scheduling and enter a new date by clicking .



Schedule Maintenance Plan: Single cycle plan dialog box. It has tabs: Start, Start in cycle, New Start, Manual call, and Schedule overview list. The Manual call tab is selected. Below the tabs, there are fields for Maintenance plan (10000384) and CPO FAMILY 10.

If the new schedule lines look correct, save the plan by clicking .



The system will report that the plan has been scheduled:

✓ Maintenance plan 10000382 scheduled


The new notification(s) will be created immediately and will be included in the recall list. Please refer to job aid [CPMSJA010](#) for help with listing notifications.

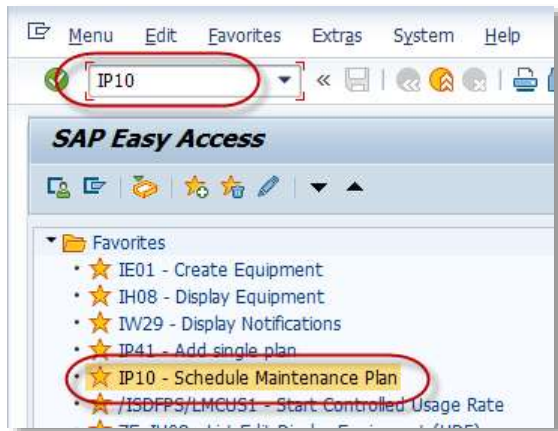
2. Update maintenance plan schedule

By default, a nightly batch job will automatically schedule all of the CPMS maintenance plans and update the date-related data for the EMR (i.e. **Last Cal Date**, **Next Due Date**). When a delivery slip is printed, it pulls this data from the plan and includes it on the print out, as shown below:

National Défense Défense nationale		CFB Shilo - Shipping		05.12.2018												
Consignee Way Bill / Bordereau d'expédition / Destinataire																
Priority/Priorité 03 - Routine		Delivery/Livraison : 800002760		User Id/ID utilisateur SCI-6716 SCI-6716												
800002760																
Ship From / Expéditeur : 9108 CFB Shilo Area Support Unit PO BOX 5000 STN MAIN SHILO MB R0K 2A0 CANADA			Ship To / Livrer à : 130Q QETE 5-4 CALIBRATION Main Warehouse 123 Somewhere OTTAWA ON K1A 0K2 CANADA													
Plant/Storage Location: 0002 / A019 - Army / Stor Loc A019			Plant/Storage Location: 1000 / 0012 - ADM (Mat) / QETE 5-4 CAL NS													
Item Poste	STO/Item CT/Poste	Material Article Description	Batch Lot	Qty Qté	UoM UQ	HAZMAT HAZMAT	CTAT ATTIC	IMA IMA	SC SC	Weight Poids	UoM UQ	Volume Volume	UoM UQ	Unit Price Prix unitaire	Extended Cost Coût prolongé	Curr Dev.
1	4700055708 / 1	31-1T19957 NEN MULTIMETER		1	EA	N		1B	A	0.00	KG	0.00		1,353.24	1,353.24	CAD
CFR		EMR No.	Manuf S/N	SAP S/N	Status	Last Cal Date		Next Due Date								
		20241031	NO MPL, NO ROTF	20241031	PCAL CALA	01.09.2018		02.09.2019								
20241031																

If an STTE has been calibrated and needs to be shipped immediately (i.e. before the nightly job has run), it will be necessary to update the maintenance plan manually to ensure the dates included on the delivery slip are correct.

Execute transaction **IP10** by entering it in the *Command Box* and hitting  or by selecting it from your Favorites menu.




The *Schedule Maintenance Plan: Initial* screen is shown.

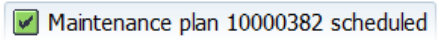
Enter the plan number. Press .

The *Schedule Maintenance Plan: Single cycle plan* screen is shown.

C...	PlanDate	Call date	Completion d...	Scheduling Type / Status	Act. ...	Unit
2	2020.01.21	2019.12.16		Scheduled Hold		

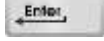
Without changing anything, save the plan by clicking .

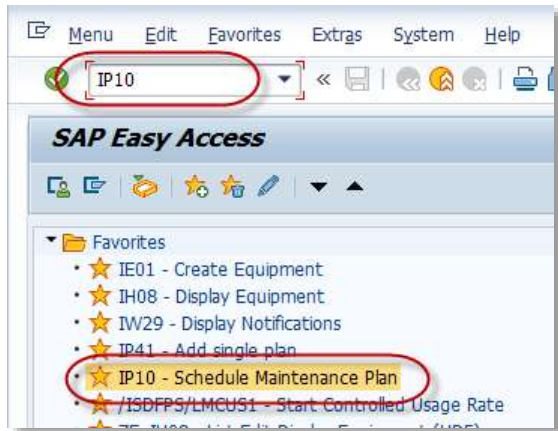
The system will report that the plan has been scheduled:



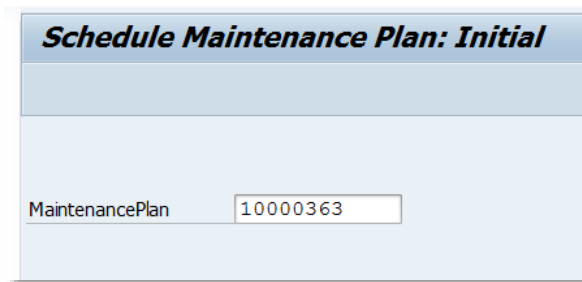
The plan dates have now been updated.

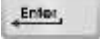
3. Adjust the next scheduled recall

Execute transaction **IP10** by entering it in the *Command Box* and hitting  or by selecting it from your Favorites menu.



The *Schedule Maintenance Plan: Initial* screen is shown.



Enter the plan number. Press .

The *Schedule Maintenance Plan: Single cycle plan* screen is shown.

Schedule Maintenance Plan: Single cycle plan 000010000363

Start Start in cycle New Start Manual call Schedule overview list

Maintenance plan 10000363 Calibration MP for EMR 10048812

Scheduled calls Manual calls Maintenance plan scheduling parameters Maintenance plan additional data

Scheduling List

C...	PlanDate	Call date	Completion d...	Scheduling Type / Status	Act. ...	Unit
3	2019.11.29	2019.11.11		Scheduled Hold		


Navigation icons: [Back] [Forward] [Refresh] [Print] [Help] [Save] [Cancel] [OK]

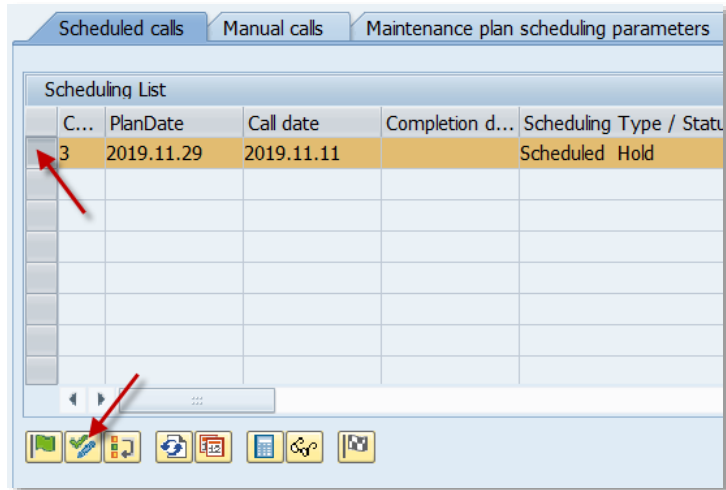
The first call with “Hold” status will be aligned to the top of the Scheduling List. This represents the next recall notification. The call shows the **Plan Date**, which is when the recall is due to be processed, and the **Call Date**, which is when the system will automatically create the notification (in most cases, approximately two weeks before the Plan Date).

Scheduled calls Manual calls Maintenance plan scheduling parameters

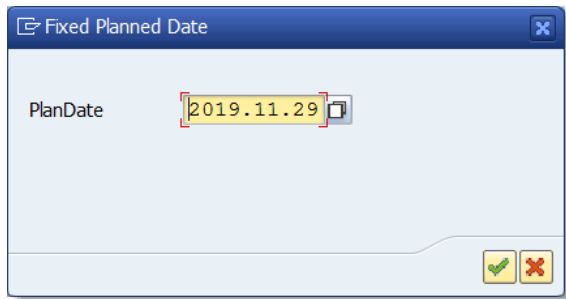
Scheduling List

C...	PlanDate	Call date	Completion d...	Scheduling Type / Status
3	2019.11.29	2019.11.11		Scheduled Hold

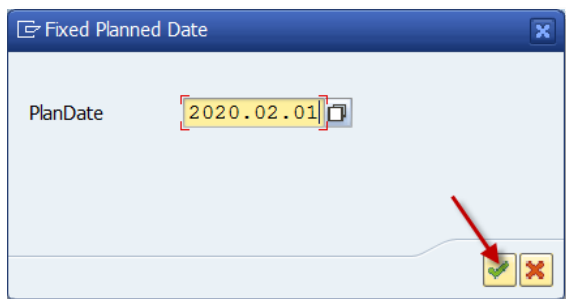
To change the Plan Date of this recall, select the line by clicking in the far-left column and then click  at the bottom of the screen:



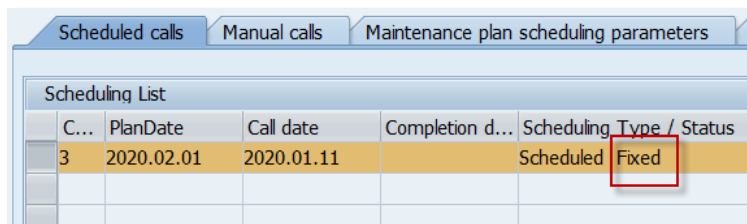
The *Fixed Planned Date* window will open, allowing you to change the Plan Date:




Enter the new desired Plan Date and press  to continue.




The call status will be changed to “Fixed”:



The nightly batch job that automatically creates the recalls will create a notification for this STTE on the new fixed date.

Save the plan by clicking .

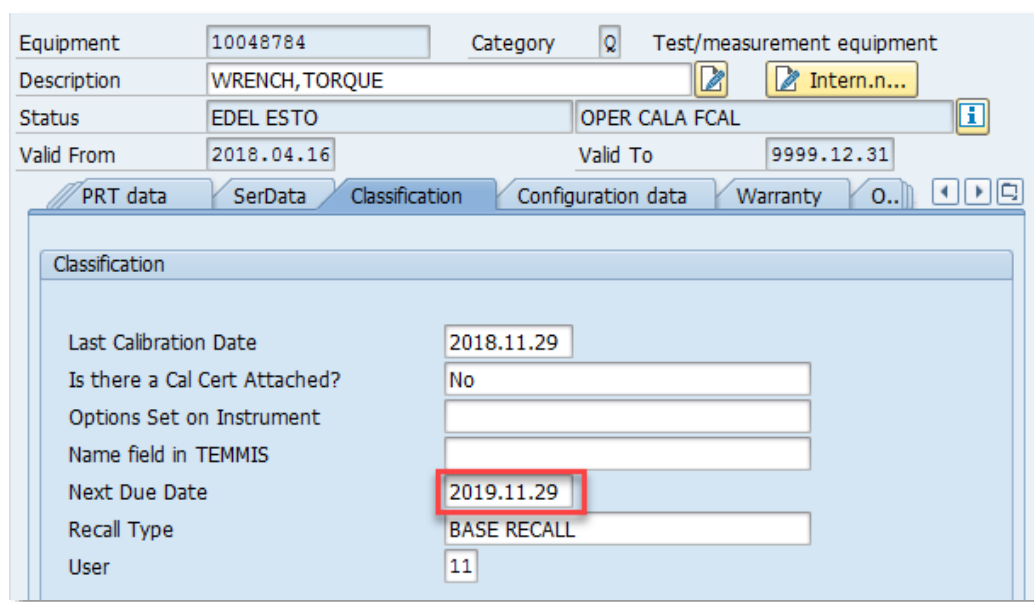
The system will report that the plan has been scheduled:

 Maintenance plan 10000363 scheduled

The plan's scheduling is now updated.

Important: Please take note of the following if the CPMS solution is not yet rolled out to all calibration centres:

If the scheduling of the maintenance plan is manually changed, the equipment master record (EMR) that is assigned to the plan will have an incorrect value for the **Next Due Date** characteristic.



The screenshot displays the 'Classification' tab of the CPMS software. At the top, equipment details are shown: Equipment ID 10048784, Category 'Test/measurement equipment', Description 'WRENCH, TORQUE', Status 'EDEL ESTO', and Valid From/To dates '2018.04.16' and '9999.12.31'. Below this, the 'Classification' section contains several fields: 'Last Calibration Date' (2018.11.29), 'Is there a Cal Cert Attached?' (No), 'Options Set on Instrument' (empty), 'Name field in TEMMIS' (empty), 'Next Due Date' (2019.11.29, highlighted with a red box), 'Recall Type' (BASE RECALL), and 'User' (11).

If the new fixed Plan Date you entered is in the future, please contact the Environmental CDM or QETE CDM at [+TEMMIS@ADM\(Mat\) QETE@Ottawa-Hull](mailto:TEMMIS@ADM(Mat) QETE@Ottawa-Hull) to have the EMR data manually updated to reflect the new Next Due Date.

If the new fixed Plan Date you entered is in the past, the Last Calibration Date and Next Due Date can be updated on the EMR by creating a new recall notification and immediately closing it. For instructions, please refer to job aid [CPMSJA029, step 2](#).

These steps are only required during the CPMS roll-out. Once all calibration centres are live on the system, a nightly batch job will automatically populate the correct Next Due Date value.

For assistance with this or any other CPMS process, please contact your regional calibration center.

Record of Changes

PDF Saved Date	Changes
January 21, 2019	Created from existing job aids to break up the functionality of IP02/IP10.
March 5, 2019	Added text to the Purpose section for deployed ships.
March 27, 2019	Added hyperlinks to job aids to process flow diagram.
April 3, 2019	Changed the instructions for re-scheduling the plan to create a notification immediately.
June 27, 2019	Added instructions for having a CDM update the EMR data after the plan's schedule has been changed (until all cal centres have been rolled out).