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# Introduction

There are basically three steps to using Lube-It. They are: 1) Documenting What to Lubricate, 2) Planning How to Lubricate, and 3) Executing Your Plan. This tutorial will take you through these three steps. At the end of the tutorial, you will have learned all the basic tools needed to streamline the job of lubricating your equipment!

This introduction will first explain the three steps in general terms. Subsequent sections will actually take you into Lube-It and walk you through each step.

## 1. Document what to lubricate

Before any lube routes or schedules can be created, you must first determine what equipment at your site needs lubrication. This includes determining what components reside on each piece of equipment, what lubricants are needed, how many lubrication points each component contains, etc.

Basically, there are three methods for getting this basic data into Lube-It.

### 1) Entering manually

System, equipment, and task data is entered from the Equipment Manager, which we will look at in the next section of this tutorial. Other data, such as products, locations, and staff members, can be entered from windows found under the Define menu.

### 2) Importing data from a survey package

Survey packages are created using Lube-It's companion product, SurveyPro. A survey package contains all data necessary to schedule lube routes, with the exception of staff members, routes, and, if necessary, meters.

### 3) Importing data from a text file

This method is useful if you already have a significant amount of data stored in another format. If the data can be put into a text file, it can be imported into Lube-It, which means not having to re-enter the data. (The Lube-It manual and on-line help give specifications necessary for this text file.)

See the Lube-It User Manual for more information on entering or importing data.

For the purposes of this tutorial, we will use the demo data supplied with Lube-It. The demo data is a complete set of all the data you need to practice creating lube schedules. You can do anything you like with this data, and your real data will not be affected.

## 2. Plan how to go about it

Once your basic data has been entered, you need to decide how to organize the lubrication of the equipment into routes. A route is a sequence of lubrication tasks that are grouped together and

are typically performed by a single person. Routes can be determined by physical proximity of equipment, by the lubricants required, etc. If your requirements are small enough, you could simply have one route into which all tasks are grouped. If this is not practical, you can create as many routes as necessary.

This tutorial will take you through the steps necessary to create a route, assign tasks to it using the Route Wizard, and then use the Route Explorer to reorder the tasks in the route. Lastly, you will learn how to print out the route.

### ***3. Execute your plan***

Once your routes have been created, you are ready to begin scheduling the tasks in the routes. Building a schedule is a relatively simple process, as Lube-It does most of the work for you. Once the schedules are created, they can be printed out, and lubrication can begin.

The first time you build a schedule, however, Lube-It needs information about the past lubrication of your equipment, and so it requires a little more input from you. Once this information has been supplied, schedule building is quick and easy.

This tutorial will take you through the building of your first schedule, how to look at the scheduled routes once they have been built, and how to print out scheduled routes. You will then be shown how a scheduled route is closed. You will go through this process twice, as the second time through (and all subsequent times) are a little different than the building of the first schedule.

# Start Lube-It

**DO IT!** 

### *Start Lube-It\**

1. Click on the **Start** button.
2. Select **Programs** from the **Start** menu.
3. Select **Lube-It** from the **Programs** menu.
4. Select **Lube-It 3** from the **Lube-It** menu.

1.

If you are running the multi-user version of Lube-It, you will be presented with a window prompting you for a username and password. If you don't know your username and password, you can get it from your system administrator.

Lube-It will then startup, presenting you with the Main Panel.

# Document what to lubricate

First, we will set Lube-It's data source to the demo data, meaning that nothing you do in this tutorial will affect your real data, if there is any yet.

**DO IT!** 

### *Set the Data Source*

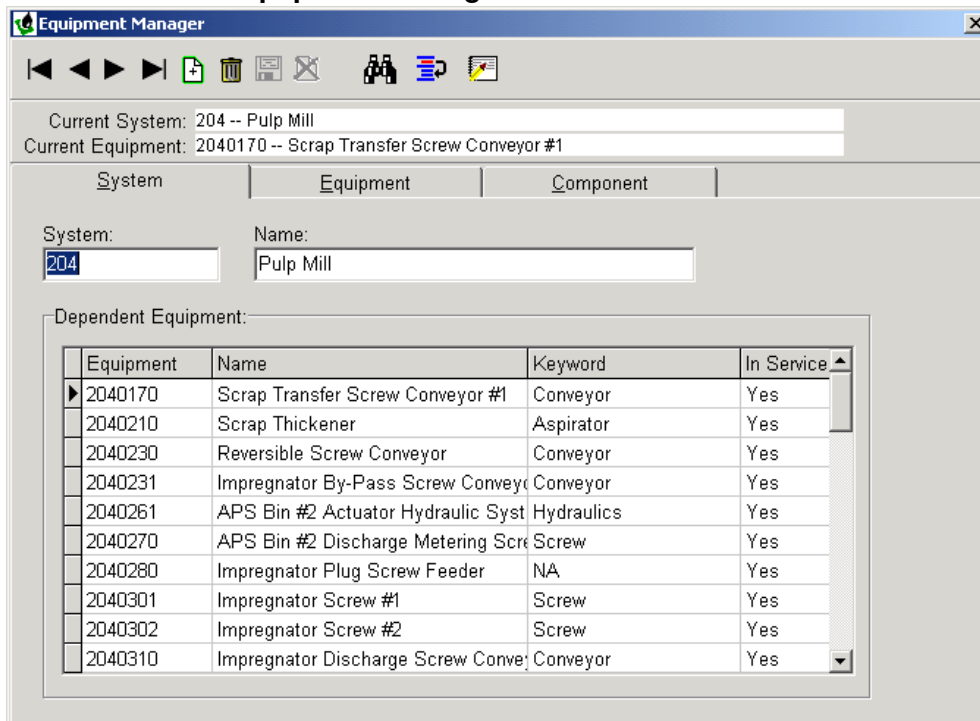
1. Select **Lube-It** from the menu.
2. Select **Data Source...** from the submenu.
3. Click on the **Demo Data** radio button in the dialog box. (Of course, though it is not recommended, you may run this tutorial with real data if you wish. In that case, select **Your Data** instead.)
4. Click on the button labeled **Re-Load Demo Data**. This step insures that you are working with an unaltered set of demo data.
5. Click on **OK** to confirm re-loading the demo data. The re-load will take a minute or so.
6. Click on the **Close** button. It will take Lube-It a moment to switch to the demo data.

## The Equipment Manager

The Equipment Manager is where you view, edit, and maintain your equipment data, as well as the details about all the lubrication tasks for each piece of equipment. In this next section, you will become familiar with the Equipment Manager, and in so doing, will also learn some of the features common to all data entry windows in Lube-It.

### **DO IT!** Open the Equipment Manager

- Click on the **Equipment** button on the Main Panel
- or -
- 1. Select **Equipment** from the menu
- 2. Select **Equipment Manager** from the submenu



**The Equipment Manager**

The Equipment Manager is made up of three tabs, or pages. These pages are labeled **System**, **Equipment**, and **Component**. The picture above displays the **System** page.

**What is a system?**

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A system is simply a group of equipment with something in common. You can group your equipment into systems in any way you find useful. For example, equipment can be separated into systems based on their physical location, on their function at your site, etc. In the demo data, systems are denoted by their function. Some systems in the demo data include "Pulp Mill", "Boiler", and "Water Treatment".

The currently displayed system is number 204, Pulp Mill. The system number and name are seen at the top of the window. The grid underneath lists all equipment that is assigned to this system. Now let's look at the equipment page.

**DO IT!**

### Tab to the Equipment Page

- Click on the tab labeled **Equipment** near the top of the Equipment Manager

#### The Equipment Page of the Equipment Manager

System	Equipment	Component	
Equipment:	Name:	Keyword:	
2040170	Scrap Transfer Screw Conveyor #1	Conveyor	
Tag / Alt ID:	Functional / Other:		
Location:	Meter:	Eqp Details:	
South End, First Floor		<input checked="" type="checkbox"/> In Service	
Manufacturer:	Model Number:	<input type="checkbox"/> Critical	
		<input type="checkbox"/> Sub-Assy	
Dependent Components:			
Component Name	Points	Method	Product
▶ Electric Motor Bearing : Sealed	1	Pressure Gun	Hi-Temp SHC-32 Grease
Reduction Gear Case	1	Oil Bath	Ultrex Gear Lube 220
Shaft Bearings	2	Pressure Gun	Ultrex-Plex Grease EP 2

The Equipment Manager is now on the Equipment page, and displays information about a single piece of equipment, "Scrap Transfer Screw Conveyor #1", which belongs to the system "Pulp Mill". The information displayed includes its location, whether it is in service or not, etc. At the bottom of the page is a listing of components belonging to that piece of equipment.

Now let's look at one of these components. You could simply click on the **Components** tab as you did to get to the Equipment page, but let's use another method.

**DO IT!****Tab to the Component Page**

- In the grid at the bottom of the screen, double-click on the second line, which contains the component "Reduction Gear Case".

System | Equipment | Component

Component: Reduction Gear Case | Additional Text: | Quantity: 1 | Capacity: | Points: 1

Method: Oil Bath | Product: Ultrax Gear Lube 220 |  Track Consumption

Task Details | Current Due Dates | Last Done Dates | Projected Due Dates

Task Details: Period: Start: End:

Type	Due	Trigger	SD	Route Description	Dur	Procedure 1	Procedure 2
Service		W1		Pulp Machine Route			
Change		Y1		Pulp Machine Route			

Add New | Edit Task | Delete Task | Consumption | Task History

*The Component page of the Equipment Manager*

The Component page is now displayed, showing information about the "Reduction Gear Case" component in the previously displayed piece of equipment.

It is important to notice that every time you select a new page in the Equipment Manager, you are displaying something that is related to the previous page's data. For example, we first looked at the system "Pulp Mill". When we went to the Equipment page, we were looking at a piece of equipment in the Pulp Mill system, and when we moved to the component page, we saw a component belonging to that piece of equipment.

The component page contains information about the components such as its lubricant and lubrication method. This component, for example, uses the lubricant "Ultrax Gear Lube 220" and method "Oil Bath",

At the bottom of the page, you will see the **Task Detail Grid**. This grid contains the lubrication tasks associated with the component. The three task types are "Service", "Change", and "Sample". The task type is indicated by a gray cell at the left end of the grid under the column

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heading "Type". The currently displayed component has both a "Service" task and a "Change" task associated with it.

In addition to the three standard task types, users may define their own task types by choosing Define/Task Types from the main menu. See the Lube-It User Manual for more information.

### What's the difference?

A "Service" task is the standard lubrication of the component, performed at either regular time intervals or based on the reading of a meter. For example: topping off a reservoir, greasing a fitting, oiling a chain, etc.

A "Change" task is the complete changing out, or replacement, of a lubricant. For example: lube- oil - filter, drain and fill, etc.

A "Sample" task is the taking of a sample of existing lubricant for laboratory testing.

### The Toolbar



The equipment "Scrap Transfer Screw Conveyor #1" contains a total of three components. What if we want to look at a component besides "Reduction Gear Case"? How can we browse through them? The toolbar at the very top of the Equipment Manager contains tools to enable us to do this. Let's look at this toolbar now.

The eight buttons on the left side of the toolbar are called the "Navigator", and allow you to move through and manipulate records in the window. We will only concern ourselves with the Navigator in this tutorial. The other three buttons are the Find Button, the Reposition Button, and the Notes Button. You can learn about these in the User Manual.

Now we will use the buttons in the Navigator to browse around the components belonging to the equipment record "Scrap Transfer Screw Conveyor #1".

### DO IT!

#### Navigate Through Components

1. As you may remember, the "Reduction Gear Case" is the second of the three components in the equipment. Click on the third button from the left in the Navigator, which is a plain, right-pointing arrow. The component window now increments on one record, displaying the third component in the equipment "Scrap Transfer Screw Conveyor #1". You can see that the component is "Shaft Bearings".
2. To jump quickly back to the second component, click on the second button from the left, which is a plain left-pointing arrow. The "Reduction Gear Case" component is displayed again. Experiment with these two buttons to get a feel for how they are used to move through records.
3. The leftmost and fourth buttons in the Navigator, arrows with vertical bars, take you quickly to the *first* and *last* records. Try these out now.

The rest of the buttons in the Navigator allow you to create and delete new records, save them, and cancel pending changes to them.

Now we are going to add a third task to this component, of type "Sample".

**DO IT!****Add a Task to a Component**

1. Use the Navigator buttons to again display the component "Reduction Gear Case", if it is not already displayed.
2. Click on the **Add New** button located at the bottom of the Equipment Manager under the Task Details Grid.
3. In the dialog that appears, select the task type **Sample**. It is the only one available, since this component already has a "Service" and "Change" task. (There can only be one task of each type per component.)
4. Click **OK**.
5. The **Component Tasks** dialog appears. In this dialog, you enter information about the task.
6. In the **Trigger** field, click on the down-pointing arrow at the right end of the field. A drop-down list of available triggers appears.
7. Using the arrows at the right of the drop-down list, scroll down through the list until the trigger "3 Months" appears.
8. Click on the trigger "3 Months". It is placed into the field. Alternately, you can just start typing "3 Months". The drop-down list will automatically open and highlight the "3 Months" selection.
9. Use the same method in the field **Route Description** to select "Oil Sampling Route".
10. In the **Procedure 1** field, select "Wipe Clean".
11. Click in the **Date Last Done** field.
12. You will enter the date this task was last performed. Enter a date that is about 4 months prior to today's date. For example, if today is July 11, 2001, enter 3/11/01. (The date must be in the standard date format for your computer.)
13. Click on the **Update** button to add the new task to the component. It now appears in the Task Details Grid.

### **Why enter a date 4 months ago?**

The "Sample" task that you added was specified to come due every 3 months. In step 12 you were instructed to enter a Date Last Done of 4 months ago. Later in the tutorial, you will create a lube schedule, which will contain all due tasks. For instructional purposes, we wanted the new task you entered to be sure and show up as due in the first schedule. If the task needs to be performed every 3 months and was last performed 4 months ago, it is certain to be due in the first schedule you make.

Normally, of course, you will be entering the actual date the task was last performed. If you don't know that date, or choose not to use it, Lube-It will assign a next due date automatically.

## Plan how to go about it

*"I can see that there might be a very large number of tasks. How do I keep all these tasks organized"?*

The answer is *Routes*. A route is a collection of tasks to be performed together in a specific sequence. You will be planning and building your own routes. You can base routes on the physical proximity of the tasks, the lubricants needed to perform them, the person trained to do them, the function within the organization, or any way you see fit.

### Several tools to maintain routes

The Route Explorer is used to edit existing routes, re-order tasks within routes, or add new routes. This tutorial will take you through the Route Explorer shortly.

The Route Wizard is an easy way to assign a large number of tasks to a route. We will also be trying out the Route Wizard later in this section of the tutorial.

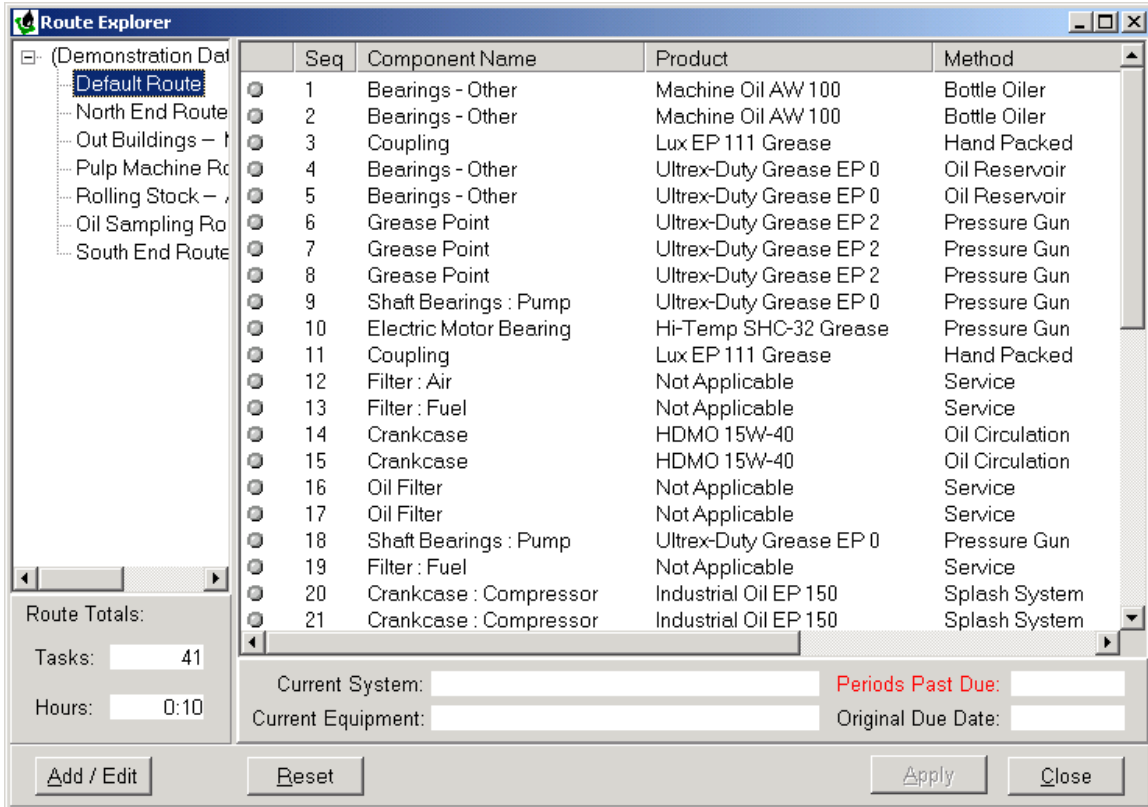
## The Route Explorer

The demo data you are using in this tutorial contains a number of routes which already have tasks assigned to them. Let's take a look at these routes now.

**DO IT!** **Open the Route Explorer**

1. If you have not already done so, close the Equipment Manager.
2. From the Main Panel, click on the **Lube Routes** button, or select **Routes** from the menu and **Route Explorer** from the submenu.

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**The Route Explorer**

As you can see, the Route Explorer is divided into two sections. On the left is a list of all the routes in the Demonstration database, such as "North End Route" and "Out Buildings". The right side displays all the lubrication tasks belonging to the highlighted route.

### The Default Route

The first route listed, and the one highlighted when you first enter the Route Explorer, is the **Default Route**. This is a special route containing all tasks not assigned to any other route. (No task can be unassigned.) You cannot rename or delete the Default Route. In the demo data, you can see that the Default Route contains 41 tasks. This means that there are 41 tasks not assigned to a user-defined route.

If any tasks remain on the default route they are scheduled along with your other routes. This means you can take your time defining and building your routes with full confidence that none of your tasks will go unnoticed.

Notice the second route from the bottom, "Oil Sampling Route". Let's look at this route in more detail.



### View the Task List For a Route

- On the left side of the Route Explorer, click on "Oil Sampling Route".

On the right side of the Route Explorer, the previous list of tasks (those for the Default Route) has been replaced with tasks for the Oil Sampling Route. Notice that only one task is assigned to that route. That is the task you added in the previous section of the tutorial! You may remember that you selected "Oil Sampling Route" in the **Route Description** field when creating the task.

You can see the task you added, with the component "Reduction Gear Case", its method and product, and the task type "Sample". There is no due date on the task, or any task for that matter, because due dates are not assigned until schedules are built. We will build schedules later in the tutorial.

You can look at the list of tasks for any of the routes listed here by highlighting the route name on the left side of the Route Explorer. Try it now.

The **Add/Edit** button is used to change the description of an existing route, assign a route to a different staff member or create a new route. Try that too. Notice that the window contains another Navigator like the one found on the Equipment Manager. In this case the Navigator lets you move around routes.

## The Route Wizard

*"How did all those tasks get assigned to all those routes? Some of the routes have hundreds of tasks assigned. This sounds hard."*

It isn't. In fact, using the Route Wizard, we are going to do just that right now. Remember those 42 tasks that were unassigned (assigned to the Default Route)? Many of those tasks are of type "Sample". Say we have a lube engineer whose job it is to collect samples of lubricants for lab testing. To create a lube route for this engineer, we are going to use the Route Wizard to assign all "Sample" tasks to the route "Oil Sampling Route" (which was created earlier but only has one task assigned to it so far).

### **DO IT!**

#### **Assign Tasks With the Route Wizard**

1. If you have not already done so, close the Route Explorer by clicking on the **Close** button.
2. Select **Routes** from the menu.
3. Select **Route Wizard** from the submenu. (The Route Wizard contains a good deal of helpful text to walk you through the process of assigning tasks. You should read this text along the way to help you further understand the Route Wizard as you progress through this procedure.)
4. Read the introductory text, then click the **Next >>** button.
5. Beginners can skip this first step of the Route Wizard. After reading the text regarding this step, click the **Next >>** button again to move on to the next step.
6. This screen lists all the criteria you will use to filter the tasks in the Default Route to just those that interest you (in this case, all the "Sample" tasks). There aren't any yet, so you must add one. Click on the **Add / Edit Criteria** button. (Keep in mind that

the default route may have very many tasks in it. We need to filter down the list so that we are only looking at the tasks which concern us at this moment.)

7. After reading the helpful text for this next step, click the **Next >>** button once again (to clear the help text).
8. Since we are going to be selecting all tasks of a particular task type, we will choose Task Type as our first field to filter on. In the left panel, click on "Task Type". The right panel should now display the three different task types. In the right panel, select "Sample the Product", then click the **Mark Selected** button. The green arrow indicates that you have selected the Task Type of "Sample" as a criterion you want to filter on in the Default Route.
- 9.
10. You are then allowed to select further criteria for your tasks. The only criterion we are concerned with now, however, is the task type. (We may have, for example, also filtered the list of tasks to only include those with Keyword "Pump", or with a Method of "Pressure Gun".) Click the **OK** button to return to the last screen. You can see that the criterion "Task Type Equals 'Sample the Product'" now appears in the list box.

*"Hang on a second. What did I just do?"*

You just told Lube-It that in the next screen you want to see a list of all the tasks in the Default Route whose Task Type is "Sample". Next you will be able to add some or all of these tasks to another route.

11. Click **Next** to continue to the next screen.
12. In the next screen, Lube-It presents you with a list of all tasks in the Default Route which contain the task type "Sample", just as requested. There are 14 such tasks, as indicated at the top of the window. Read the helpful text and then click the **Next >>** button to make it disappear.
13. At this window you can select precisely which tasks you want to add to a route. In this case, we want to add all the tasks listed here. To do this, click on the **Select All** button. The entire list of tasks becomes highlighted. (If we only wanted some of these tasks added, we would have selected just the ones we wanted by selecting them while holding down the Shift and/or Ctrl keys.)
14. We next tell Lube-It which route to add these tasks to. Click on the arrow attached to the field labeled **Move selected tasks to:**. Select "Oil Sampling Route" from the dropdown list.
15. You are ready to tell Lube-It to assign all tasks listed here, (which is all tasks in the Default Route with a task type of "Sample"), to the route "Oil Sampling Route". Simply click on the **Finish** button.
16. In a second or two, the tasks are assigned! You are shown a dialog explaining what just happened. Click **OK**.

That's all there is to it! As you can see, it is relatively easy to quickly assign large numbers of tasks to a route. Let's now go back to the Route Explorer and look at the fruits of our labors.

Click on **Lube Routes** again from the Main Panel, then select the "Oil Sampling Route" from the left panel. As you can see, the route previously had only one task, but now has 15, because you just added the 14 unassigned "Sample" tasks with the Route Wizard.

The 15 tasks are listed in the order in which they were found and added from the Route Wizard. However, when the route is actually performed, there may be a much more convenient order in which these tasks will be performed. You can reorder these tasks to suit the needs of the person performing the route. Let's try this next.

**DO IT!****Reorder Tasks Within a Route**

1. Select the second task in the list, (ComponentName "Reservoir: Hydraulic Oil", product "Hydraulic Oil AW 46").
2. Click on the second task again, this time holding the mouse button down while you move the pointer down a few rows. You will see a highlight bar follow the mouse as you move it.
3. Release the mouse button, and the task you selected moves to the point where the button was released.
4. Practice reordering tasks with this method a few times until you get the hang of it. You don't have to move the tasks one at a time, however. Using the Shift and Ctrl keys as you select rows, you can select multiple tasks and move them around as a group.
5. Click on the **Close** button.
6. Since you made changes to the route (by reordering the tasks within it), you are asked if you want to save your changes. Normally you would select **Yes** to save these changes. However, for the purposes of this demo please select **No**.
7. Notice your changes are undone and the tasks are shown in their original sequence. Close the Route Explorer by clicking on the **Close** button again. You can select **Yes**. Notice that the sequence numbers for the tasks has been reset.

## Printing a Route Listing

*"This is all good, but I like to look at hard copies. How can I print out these task lists?"*

Lube-It comes supplied with over 50 reports you can see on-screen or print out. The route details report is just one of them. Let's print out our newly built route now.

**DO IT!****Print a Route Listing**

1. If you have not already done so, close the Route Explorer by clicking on the **Close** button.
2. Click on the **Reports** button on the Main Panel.

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3. From the submenu that appears, choose **Route Reports**
4. From the submenu, choose **Route Details (Tasks)...**
5. From the Print Route Details dialog, select the Oil Sampling Route.
6. Now Click the **Preview Selected Routes** button. This allows us to preview the report on-screen before sending it to the printer. The report generation process may take a moment.
7. If you would like, you can print directly from the report preview window without having to run the report again. Simply Click on the printer button at the top of the report preview window.
8. Once you are done previewing the report, close it by Clicking on the **Close** button (which looks like a letter X) in the upper left-hand corner of the report preview window.
9. Finally, close the Print Route Details dialog. You are now all set to learn about building schedules.

Lube-It now supports handheld devices. If you have Lube-It for Handhelds, you can export a route to your handheld device, mark the tasks as completed, then import them back into Lube-It on the PC. See the User Manual for information on using Lube-It with handheld devices.

## Execute your plan

*"OK, so I have my routes all set up. Now that the data is there, what do I do with it?"*

You are ready to make your first schedule!

The process of building a schedule is one you will perform every week, every two weeks, or every month. Lube-It does most of the work for you, fortunately, because it knows when every task was last performed, and when it should be due next.

However, the first time you build a schedule, you have to do a few extra steps, because Lube-It does not know when these tasks were last performed. (Obviously, since you weren't using Lube-It before!) So, the first time you build a schedule, you can either tell Lube-It when all tasks were last performed, or you can simply let Lube-It assign the first schedule's due dates automatically.

In this next section, we will build a first schedule, (letting Lube-It assign due dates automatically), complete that schedule, and, just for good measure, build the second schedule, which is a quicker process than the first. Close the print preview window if necessary.

### Your First Schedule

#### **DO IT!**

#### **Build Your First Schedule**

1. From the Main Panel, click on the **Lube Schedule** button. The Lube Schedule Panel opens up.
2. Notice that the only button that is active is **Build First Schedule**. None of the other buttons apply unless you have a schedule built. So, of course, click on **Build First Schedule**.
3. The Build Scheduledialog opens up. Most of this dialog is just to keep you informed of the process of the schedule build. The only thing you can do here is click on **Start Now**. Do this now.
4. The **First Schedule Wizard** starts up. This only appears the first time you are building a schedule. For this tutorial, we will accept all the default values. To accept the default of one week as the frequency with which new schedules are created, click on **Next >**.
5. To accept the default schedule start date of last Sunday, click on **Next >**.
6. To accept the default year type as "Calendar Year", click **Finished**. Lube-It needs to work for a minute or so while the scheduled data files are initialized.
7. The **Set Date Last Done** dialog opens. Here we could set the date each and every task at our fictional company was last performed, but for the purposes of this tutorial, we will simply let Lube-It assign initial due dates automatically. Click on the

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**Automatic** button. Wait a moment while Lube-It assigns the due dates automatically. Lube-It will spread the due dates out over a period of time so that everything does not come due your first week.

8. Click the **Done** button.
9. Click **Yes** in the confirmation message box.
10. A second confirmation box will appear informing you that there are 27 unassigned tasks. What are these? Remember back when you learned how to use the Route Wizard to assign tasks to a route? You selected all unassigned tasks of type "Sample". However, there were some other unassigned tasks that were never added to any route. Lube-It is reminding you of these at this point. Click on **Yes**, leaving the unassigned tasks in the Default Route.
11. Lube-It will now build the schedule. A blue arrow points to the step that is currently being performed. A green check mark indicates steps that have been completed. This process will take a few moments. There is nothing to do during the building process but wait.

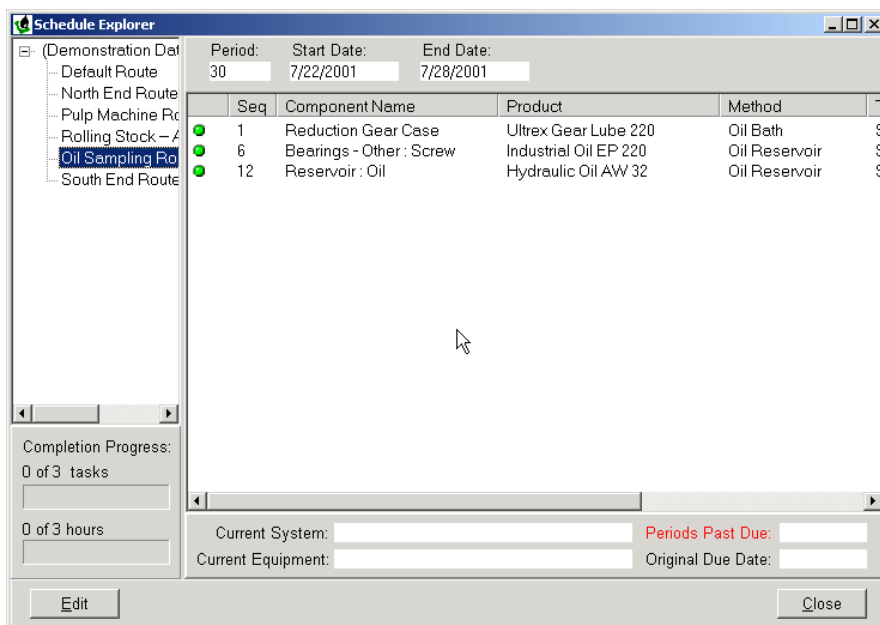
Your first schedule has now been built! Piece of cake. The Lube Schedule Panel is displayed again, but notice now that all the buttons are active. Take a moment to read through the text next to each button to learn what you can do with a schedule.

Of course, the first thing you will want to do is look at your schedule.

**DO IT!****View Your Schedule**

1. Click on the **Open Schedule Explorer** button on the Lube Schedule Panel. The Schedule Explorer (shown below) lists all routes that have tasks due.

Notice that this does not include all routes in the demo dataset. When you looked at routes in the Route Manager Route Explorer, there were more in all. However, some of those routes did not have any tasks in them that came due in the coming week's schedule. Notice also that the "Oil Sampling Route", to which we added some 14 tasks, only shows three tasks. This is because only three of the tasks were found to be due this coming week.

**The Schedule Explorer**

Like the Route Explorer, the Schedule Explorer shows a list of routes on the left side and tasks associated with the selected route on the right side. (In the Schedule Explorer, of course, only those tasks which are due in the next schedule are listed, while the Route Explorer shows all tasks for the selected route.)

2. Now let's look at the due tasks in our "Oil Sampling Route". Select it on the left side, and the three tasks that are due in the first week's schedule display on the right. Notice also that the three sequencenumbers in the leftmost column are not consecutive. The missing sequencenumbers represent the tasks in the route that are not due in this schedule.

Throughout Lube-It, you can tell at a glance any task that is due or overdue by the color of the icon in the left column.. This goes for this scheduled task list, the task list from within the Route Explorer, or the Equipment Manager. A task with a gray icon is not due in the current schedule. Green means it is currently due (which is the case for the three due tasks in

the Oil Sampling Route), and red means it is past due. We will see an overdue task later in the tutorial.

3. Click the **Close** button to exit the Schedule Explorer.

1.

Next we will print out the scheduled tasks in the Oil Sampling Route.

### ***Printing the Scheduled Routes***

A printout of the scheduled tasks for any given route is, of course, an extremely important part of Lube-It. The printouts can be given to the lubrication engineer to assist them in performing their routes. Let's print out the scheduled tasks for our "Oil Sampling Route".



#### ***Print a Scheduled Route***

1. Click on the **Output Scheduled Routes** button in the Lube Schedule Panel.
2. Click on the **Print Scheduled Routes** button on the Print/ Check Out dialog. (You can also Check out a scheduled route to a handheld device. For more information, see the Lube-It User Manual.)
3. From the Print Scheduled Routes dialog, select the Oil Sampling Route.
4. Click on the **Preview Selected Route(s)** button. It will take a moment for the printout to be generated.

Similarly to when we printed the Route Details report, we are allowed to preview the printout before printing it. Take a moment to look at the information that you are supplied when printing out your scheduled tasks.

Notice how similar this report looks to the one we printed out previously, which listed all the tasks in the route.

5. If you wish, you can send the report to the printer by clicking on the printer button just above the report.
6. When you are finished, close the report by clicking on the **Close** button in the upper left-hand corner of the report preview window.

### ***Completing Tasks***

*"OK, so I give these schedule printouts to my oilers and mechanics. What do I do once they finish their routes?"*

The only way for Lube-It to know when these tasks are actually performed is for you to tell it. Lube-It allows you to enter the completion dates for each scheduled task on a route. Let's look at this now.

**DO IT!****Mark Tasks as Complete**

1. Click the **Update Scheduled Routes** button on the Lube Schedule Panel.
2. Click on the **Complete Tasks** button from the Update Scheduled Routes dialog. (If you are using Lube-It for Handhelds, you can also check in completed tasks from a handheld device. See the Lube-It User Manual for more information.)
3. In the Complete Tasks dialog, select the "Oil Sampling Route".
4. Click on the **Mark Tasks** button. You are presented again with a list of the tasks on the route that are currently due. In this dialog, completion dates are to be entered for each task that has been completed.
5. Click in the field labeled **Set To This Date:** in the lower right corner of the window. The date you select in this field is used to speed the entry of completion dates.
6. Let's pretend the tasks were completed today. Change the date in the field to today's date by selecting it from the dropdown list. If today's date is not available (meaning it is not in the schedule period), then choose the nearest date available.
7. Double-click on the first task in the list, (with the component name "Reduction Gear Case"). The date you entered now appears in the leftmost column of the grid, under the heading **Completed**.
8. Double-click on the second task in the grid, containing the component name "Bearings- Other" to add the completion date to that task as well.
9. Click **Done**. We are intentionally leaving the third task, "Reservoir" uncompleted in this tutorial, so that we can show you a past due task when the next schedule is built.
- 10.

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You are now going to complete all tasks in all the other scheduled routes. Repeat steps 10 through 13 for all the remaining routes listed in the dialog.

10. Highlight the route by clicking on it.
11. Click on the **Mark Tasks** button.
12. In the **Complete Tasks** dialog, choose the date from the **Set to This Date** field, then click on the **Set All Empty Dates** button to quickly mark all tasks as complete at once.
13. Click **Done**.
- 14.
- 15.
16. Click the **Close** button in the **Update Scheduled Routes** dialog.
- 17.

### ***Building Your Next Schedule***

Now that you have completed nearly all the tasks that were scheduled, there's nothing left to do for this schedule period. Fast-forward to the following week, when it is time to generate the next schedule. This process should seem pretty familiar-- it is very similar to the procedure you took to generate your first schedule.

#### **DO IT!**

#### ***Build Your Second Schedule***

1. Click on the **Close Current Schedule & Build New** button on the **Lube Schedule Panel**. The **Build Scheduled** dialog appears. Notice that the **Begin Date** and **End Date** fields are now a week later than the first schedule you built.
2. Click the **Start Now** button.
3. If you are using the multi-user version of Lube-It, and other users are currently logged on, then you are presented with a list of users that must be logged out before the scheduling can begin.
4. Confirm the schedule build by clicking **Yes** in the confirmation dialog.
5. You are presented with a dialog that says "There are currently 1 Scheduled Tasks not completed. Continue?" This is the one task we intentionally did not give a completion date. Select **Yes**.
6. Again, Lube-It reminds you that 278 tasks are still unassigned to a route. Click **Yes**.

As you can see, this process was simpler than the first time, because Lube-It already knew when the tasks were last completed.

Next we are going to look at the "Oil Sampling Route" again. Why? Because there will be a different set of tasks due this time than there were last time. Why? Because tasks that were not due last time have now become due, such as tasks that are due every two weeks.

This process is identical to the process used to view the schedule the first time, but it's repeated here so you don't have to flip through the pages of this tutorial.

**DO IT!*****View Your Schedule***

1. Click on the **Open Schedule Explorer** button on the Lube Schedule Panel.
2. Select "Oil Sampling Route", on the left side of the screen.

The Task List for the Oil Sampling Route appears. However, one task, "Reservoir: Oil / Hydraulic Oil AW 32", has a red icon in the leftmost column. This is our old friend from the first schedule-- the task we left uncompleted. Since we didn't complete it in the first schedule, it now appears red, indicating it is past due. As mentioned, it will continue to appear in all subsequent schedules until it is marked as completed. The task is green, with the component name "Reservoir: Hydraulic Oil", is green, because it has only become due as of this new schedule, and is not past due.

- 3.
4. Click the **Close** button to get out of the Schedule Explorer.

Lastly, let's print this new scheduled route. Again, this process is identical to the process used to view the schedule the first time, but it's repeated here so you don't have to flip a bunch of pages.

**DO IT!*****Print a Scheduled Route***

1. Click on the **Output Scheduled Routes** button in the Lube Schedule Panel, then choose **Print Scheduled Routes**.
2. Select the "Oil Sampling Route".
3. Click on the **Preview Selected Route(s)** button. It will take a moment for the report to be generated.
4. If you wish, you can send the report to the printer by clicking on the printer button just above the report.
5. When you are finished, close the report by clicking on the **Close** button in the upper left-hand corner of the report preview window.

Bravo! You did it! You documented what you wanted to lubricate, planned your routes, built a schedule and reported what did and didn't get done!

When you are ready to do all this for real, make sure you switch your data source from "Demo Data" back to "Your Data". (See "Set the Data Source" on page 4.) Also, see the Lube-It User

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Manual for the different methods of filling your initial datafiles: Importing a Survey, Importing a Text File, or manual data entry.