



Process Documentation

Department:

Customer Support

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NAME OF PROCESS

Maintaining Equipment Maintenance Steps [RolePlay]

Use Case / Objectives

This guide will walk you through how to [create and maintain all the work steps](#) used in the maintenance and repair of your equipment fleet. This file holds all of the work steps in your organization with their numbers, codes, and descriptions regardless of the equipment on which they are performed.

The guide will also walk you through how to [add or change maintenance steps for a category/class or piece of equipment](#). Maintenance steps consist work performed on the equipment in the sequence in which the steps are listed within the program.

Configuration, Training, and Reporting

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

Menu options to access:

Equipment Maintenance => Master File Maintenance => Equipment Maintenance Steps

Equipment Maintenance Steps

Update or Add New Maintenance Steps

Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. Click on the **Equipment Maintenance** menu option on the left side of the screen.
3. In the **Master File Maintenance** section, click on **Step Description Maintenance**.
 - a. The **Step Description Maintenance** screen opens, displaying any maintenance steps currently in the system.

6/09/25 09:35:10 Step Description Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO
 Mode **ADD**

Position to search word:

Language: **ENU** UNITED STATES ENGLISH Maint

Step #	Step description	Y/N	Code	Srch word
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
86	EMPTY DRAIN TANK	Y	2000	A/C
87	CHECK AIR FILTER	N	2000	A/C
88	REMOVE ELEMENT	N	2000	A/C
89	CLEAN FILTER	Y	2000	A/C
90	INSPECT POWER CORD	N	2000	A/C
91	CHECK DRAIN TANK	N	2000	A/C
92	OPERATE UNIT IN "FAN" MODE (8 HOURS)	N	2000	A/C
93	AIR FILTER SHOULD BE REPLACED	Y	2000	A/C
11	QUARTERLY AERIAL INSPECTION	Y	5000	AERIAL
12	ANNUAL AERIAL INSPECTION	Y	5000	AERIAL
50	SCISSOR ARMS FREE OF DAMAGE, CRACKS & DISTORTION	N	3000	AERIAL
51	NO UNAUTHORIZED MODIFICATIONS OR ADDITIONS ON UNIT	N	3000	AERIAL
52	INSPECT GENERAL STRUCTURAL COND. INCLUDING WELDS	N	3000	AERIAL
53	STATIC STRAP IS IN PLACE	N	3000	AERIAL
54	CHECK BOLTS & FASTENERS FOR SECURITY	N	3000	AERIAL

4. Locate the step in the list you would like to update. **NOTE:** Type in the filter fields at the top of the table to condense the list; use your mouse to scroll through the list; or use the up/down arrows in the bottom right corner of the screen. **NOTE 2:** You can also press F7 on your keyboard or click on [F07 Display by Step Number/Search WS](#) to reorder the list of steps by [Step #](#).
5. Update the desired information by typing in the corresponding field; press Enter.
 - a. The updated value will save in the list.

6/05/25 14:16:49 Step Description Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO
 Position to search word: Mode **ADD**
 Language: **ENU** UNITED STATES ENGLISH Maint

Step #	Step description	Y/N	Code	Srch word
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
40	GREASE BEARINGS	Y	1000	ZERKS
	TEST STEP 1	N	1000	TEST
	TEST STEP 2	Y	1000	STEP
	TEST STEP 3	N	2000	TEST
	TEST STEP 4	N	2000	STEP
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

8. Press Enter.
 - a. The new steps are saved and the system auto-assigns a step number to each entry.

6/06/25 08:37:59 Step Description Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO
 Position to step #: Mode **ADD**
 Language: **ENU** UNITED STATES ENGLISH Maint

Step #	Step description	Y/N	Code	Srch word
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
1232	INSPECT OVERALL CONDITION	N	1111	INSPECTION
1233	EGR VALVE REPLACEMENT	Y	5000	AERIAL
1234	REPLACE CABIN AIR FILTER	Y	5000	AERIAL
1235	SERVICE PORTABLE TOILET	N	1000	P/T
1236	TEST STEP 1	N	1000	TEST
1237	TEST STEP 2	Y	1000	STEP
1238	TEST STEP 3	N	2000	TEST
1239	TEST STEP 4	N	2000	STEP
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Add Maintenance Steps to Cat/Class or Equipment

Process Steps

1. Log in to the [Roleplay Environment](#) using your credentials.
2. Click on the **Equipment Maintenance** menu option on the left side of the screen.
3. In the **Master File Maintenance** section, click on **Equipment Maintenance Steps**.
 - a. The **Equipment Maintenance Steps - Launch** screen opens.

6/05/25 13:42:48 Equipment Maintenance Step Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO
 Mode **CHANGE**

Category:
 Class:
 Sub class:

-or-

Equipment #:

4. Type in the **Category** and **Class** or the **Equipment #**. Press F4 to search if you do not know this value. **NOTE:** Use your mouse to scroll through *all* the Categories/Classes or use the up/down arrows in the bottom right corner of the screen.
5. Press Enter to continue.
 - a. The **Equipment Maintenance Step Maintenance** screen opens, displaying any steps currently in the system for the category/class or equipment number entered. **NOTE:** For this example, there are no steps currently in the system, thus the blank list.

6/05/25 13:46:48 Equipment Maintenance Step Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO
 Mode ADD

Category: 21 Sub class: Equipment #: Print On Return:
 Class: 1311 EXCAVATOR 1 TO 1 1/2 TONS

7=Sub Step 10=Parts 18=Step Extended Description

Opt	Seq	Step #	Step Description	SubSteps	Time Frame	O'Ride Tm Frm	Mandatory Step	Create W/O	Flat Hours
<input type="checkbox"/>		5			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		10			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		15			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		20			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		25			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		30			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		35			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		40			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		45			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		50			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		55			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		60			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		65			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>		70			<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Bottom

6. Type in the **Step #** column, or with your cursor in the **Step #** column, press F4 to search.

6/06/25 08:41:05

Category: 21 Sub class: Equi
 Class: 1311 EXCAVATOR 1 TO 1 1/2
 7=Sub Step 10=Parts 18=Step Extended

Opt	Seq	Step #	Step Description
<input type="checkbox"/>	5	1	
<input type="checkbox"/>	10	3	
<input type="checkbox"/>	15	7	
<input type="checkbox"/>	20	8	
<input type="checkbox"/>	25	1236	
<input type="checkbox"/>	30		
<input type="checkbox"/>	35		
<input type="checkbox"/>	40		
<input type="checkbox"/>	45		
<input type="checkbox"/>	50		

7. Press Enter to continue.

- a. For the first step entered, the *Step Description* populates; a note appears at the bottom of the screen stating “Enter *Time Frame* type (D M O R).” **NOTE:** The *Time Frame* types are **D** - Calendar days, **R** - Rental Days, **M** - Increments on an hour meter or odometer, and **O** - One-time step.

6/06/25 08:41:05 Equipment Maintenance Step Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO
 Mode ADD

Category: 21 Sub class: Equipment #: Print On Return:
 Class: 1311 EXCAVATOR 1 TO 1 1/2 TONS
 7=Sub Step 10=Parts 18=Step Extended Description

Opt	Seq	Step #	Step Description	SubSteps	Time Frame	O'Ride Tm Frm	Mandatory Step	Create W/O	Flat Hours
<input type="checkbox"/>	5	1	CHECK FILTERS		0		<input type="checkbox"/>	<input type="checkbox"/>	

Enter Time Frame Type (D M O R)

8. Type in the *Time Frame* field and press Enter.

- a. The value entered displays in the *Time Frame* field, the *Step Description* populates for the next *Step #* entered and the note still displays at the bottom of the screen.

6/06/25 08:41:05 Equipment Maintenance Step Maintenance Sys: DEMO V12
 Cmp: RM Loc: DMO
 Mode ADD

Category: 21 Sub class: Equipment #: Print On Return:
 Class: 1311 EXCAVATOR 1 TO 1 1/2 TONS
 7=Sub Step 10=Parts 18=Step Extended Description

Opt	Seq	Step #	Step Description	SubSteps	Time Frame	O'Ride Tm Frm	Mandatory Step	Create W/O	Flat Hours
<input type="checkbox"/>	5	1	CHECK FILTERS		0		<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	10	3	CHECK HOSES		M		<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	15	7	CHANGE FLUIDS				<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	20	8					<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	25	1236					<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	30						<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	35						<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	40						<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	45						<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	50						<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	55						<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	60						<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	65						<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	70						<input type="checkbox"/>	<input type="checkbox"/>	

Bottom

Enter Time Frame Type (D M O R)

9. If desired, type in the *O’Ride* field.
10. If the step entered is mandatory, type Y in the *Mandatory Step* field; otherwise, leave blank or type N. **NOTE:** If *Mandatory Step* is set to Y, the unit displays as NOT RENTABLE on the **Equipment Inquiry** screen.
11. When performing a step, if the system should create a work order, type Y in the *Create W/O* field; otherwise, leave blank or type N.
12. If a step requires parts when performed, place your cursor in the *Opt* field next to the desired step; press F10 on your keyboard; click on F10 Parts in the **Display Functions** menu or type 10 in the field; press Enter.
 - a. The **Parts List Maintenance** screen opens for the *Step #* selected.

```

6/09/25  10:26:52          Parts List Maintenance          Sys: DEMO V12
                                                Cmp: RM Loc: DMO

Step #   1236   TEST STEP 1
Type option, press Enter.
    1=Search
Opt Item #           Qty Description
  
  
    
```

13. If you know the *Item #*, type it in the field. Otherwise, type 1 in the *Opt* field and press Enter to open the **Parts/Merchandise Search** screen to find the desired parts.
 - a. The *Item #* populates, *Qty* defaults to 1, and the *Description* populates with the value in the system.

```

6/09/25  10:28:19          Parts List Maintenance          Sys: DEMO V12
                                                Cmp: RM Loc: DMO

Step #   1236   TEST STEP 1
Type option, press Enter.
    1=Search
Opt Item #           Qty Description
 SAF1400P-L  1 GLOVES, BROWN JERSEY (LARGE)
  
    
```

14. Type in the *Qty* field if multiples are desired; otherwise, leave the value as 1.
15. If additional parts are needed, enter them now. Otherwise, press Enter to return to the **Equipment Maintenance Step Maintenance** screen.
16. If a step requires an extended description, with the cursor in the *Opt* field next to the desired step, press F18 on your keyboard; click on F18 Extended Step Description in the **Display Functions** menu; or type 18 in the field and press Enter.
 - a. The **Equipment Maintenance Step Maintenance - Extended Description** screen opens for the *Step #* selected.

```

6/09/25  10:13:54  Equipment Maintenance Step Maintenance  Sys: DEMO V12
                                                Cmp: RM Loc: DMO
                                                Mode: CHANGE

Category: 21      Sub class:      Equipment #:
Class:    1311    EXCAVATOR 1 TO 1 1/2 TONS
Step #:    1236   TEST STEP 1
    
```


Reference Glossary

Field Definitions for Tasks

Equipment Maintenance Steps - Launch

- **Category** - If applicable, enter the ID of the category for which you want to add or change maintenance steps. If you do not know the ID, press F4 to search for it.
- **Class** - If applicable, enter the ID of the class for which you want to add or change maintenance steps. If you do not know the ID, press F4 to search for it.
- **Sub Class** - If applicable, enter the ID of the sub class for which you want to add or change maintenance steps. If you do not know the ID, press F4 to search for it.
- **Equipment Number** - If applicable, enter the number of the piece of equipment for which you want to add or change maintenance steps. If you do not know the number, press F4 to search for it.

Step Description Maintenance

- **Position to Step Number** - Enter the number of a step to which you want to position at the top of the list. This function works well when you have hundreds of steps on file and want to immediately review one or more steps farther down in the list.
- **Language** - Enter the code for the language in which you are entering the step descriptions and search words.
- **Step Number** - Displays the number the system assigned to the step. Each time a new step is entered, the system assigns it the next sequential number.
- **Step Description** - Enter a brief description of the work step.
- **Maintenance** - Indicate whether the step is considered regular maintenance. Once the step is applied to a category/class or a piece of equipment, use the Equipment Due for Service Inquiry to determine whether equipment is due for that maintenance step.
- **Code** - Enter the labor code associated with the work step. If you do not know the code, press F4 to search for it.
- **Search Word** - Enter a descriptive word that you can use when searching for a work step. You can sort this list of steps by search word by pressing F7.

Equipment Maintenance Step Maintenance

- **Category** - Displays the ID of the category for which you are adding or changing maintenance steps.
- **Class** - Displays the ID of the class for which you are adding or changing maintenance steps.
- **Sub Class** - Displays the ID of the sub class for which you are adding or changing maintenance steps.
- **Equipment Number** - Displays the number of the piece of equipment for which you are adding or changing maintenance steps.

- **Sequence** - Enter or accept the sequence number of the maintenance step. This number indicates the order in which the step is displayed on the screen or on the scheduled maintenance form. If you want to add a new step in between existing steps, change the sequence number to a number that falls between the existing steps, and then press F5 to resequence all steps.
- **Step Number** - Enter the number of the step that you want to add to the category/class or equipment. If you do not know the number, press F4 to search for it. The steps are created in Step Description Maintenance.
- **Step Description** - Displays the description given to the step in Step Description Maintenance. Press F18 (Shift + F6) to enter a longer description.
- **Time Frame** - In the first field, enter the code for the periodic check interval that determines how often the step is to be performed. Valid codes are:
 - **D** - Calendar days
 - **R** - Rental days
 - **M** - Increments on an hour meter or odometer
 - **O** - One-time step
- In the second field, enter the interval quantity that applies to the check interval you entered. **For example**, if the step is performed once a month, enter D and 30.
- **Mandatory Step** - Indicates whether it is required to perform this step.
- **Create W/O** - Indicates whether or not a work order is to be generated when this step is performed.
- **Estimated or Flat Hours** - Enter either the estimated number of hours needed to complete the step or enter the flat or fixed hours it always takes to complete the step. The setting in control record **RASTP1** determines this field's label and whether you enter estimated or flat hours. If the setting is for flat hours, when this step is selected for labor on a work order, the system automatically applies the number of hours entered in this field, and the user cannot change it.

Parts List Maintenance

- **Step Number** - Displays the number of the step for which you are entering parts.
- **Item Number / Manufacturer's Number** - Enter the number of the part you want to add to the maintenance step. If you do not know the number, enter 1 in the Option field to the left and press Enter.
- **Quantity** - Enter the quantity of the part that is used during performance of the maintenance step.
- **Description** - Displays the description of the part.

Equipment Maintenance Step Maintenance - Extended Description

- **Category** - Displays the ID of the category for which you are adding or changing a maintenance step extended description.
- **Class** - Displays the ID of the class for which you are adding or changing a maintenance step extended description.

- *Sub Class* - Displays the ID of the sub class for which you are adding or changing a maintenance step extended description.
- *Equipment Number* - Displays the number of the piece of equipment for which you are adding or changing a maintenance step extended description.
- *Step Number* - Displays the number of the step for which you are entering an extended description.
- *Extended Description* - Enter a longer description for the maintenance step that might include special instructions or other information.