



Creating a Model

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Creating a Model

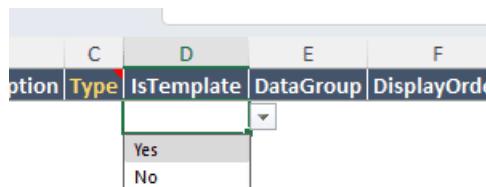
In this tutorial you will learn by example as we show you how to load different **Maintenance Plans** into Critical Manufacturing MES using **Master Data Packages**. Let's start by filling in the model in the Excel file and then load it into the system.

Modeling Sequence

As discussed before, it is vital to maintain an appropriate modeling sequence to prevent precedence errors. Let's start by filling the properties for the entities, following the proper sequence. See [Modeling Sequence](#) for more information.

Note

Whenever you are filling cells that have specific enumeration options, those options will be shown in the form of a dropdown selection box to prevent typing errors.



There are also comments in most of the columns (that, if you recall, represent the entity properties) to help you with information as well as an indication of whether the properties are mandatory.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O		
1	Name	Description	Type	IsTemplate	DataGroup	Facility	DisplayOrder	AreaType	ParentArea	DefaultTransferOrderDestinationLocation	Calendar	Schedule	SchedulingAreaGroup	CostCenter	EnableShiftLogbook	ShiftLogbook
2																
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Roles

First, let's create different **Roles** for the operators of the **Maintenance Plans**.

A	B	C	D	E	F	G
Name	Description	AutoLockTimeOut	DistributionList	IsActiveDirectoryGroup	IsScope	ChildRoles
Maintenance Manager	0					Maintenance Manager
Maintenance Technician	0					
Quality Manager	0					Quality Manager
Quality Technician	0					
Engineer	0					
Operator	0					

Info

For more information, see [Security](#).

Users

Following the rules of precedence, you can then use these same **Roles** in the **Users** sheet.

A	B	C	D	E	F	G	H	I	J	K	L	M	N
UserAccount	Username	EmailAddress	PrimaryRole	Token	Pin	Password	AuthenticationStrategy	AutoLockTimeOut	IsEnabled	IsIntegrationUser	RequirePasswordChange	Roles	
MTEC1	Maintenance Technician1	xxxxxx@criticalmanufacturing.com	1111	mtec1	0		Yes	No	No			Maintenance Technician	
MTEC2	Maintenance Technician2	xxxxxx@criticalmanufacturing.com	1111	mtec2	0		Yes	No	No			Maintenance Technician	
MMAN	Maintenance Manager	xxxxxx@criticalmanufacturing.com	1111	mmman	0		Yes	No	No			Maintenance Manager	
QMAN	Quality Manager	xxxxxx@criticalmanufacturing.com	1111	qman	0		Yes	No	No			Quality Manager	
QTEC	Quality Technician	xxxxxx@criticalmanufacturing.com	1111	qtec	0		Yes	No	No			Quality Technician	
ENG	Engineer	xxxxxx@criticalmanufacturing.com	1111	eng	0		Yes	No	No			Engineer	
OP	Operator	xxxxxx@criticalmanufacturing.com	1111	op	0		Yes	No	No			Assemble Operator	

Documents and Folders

Let's add **Documents** (that you will later upload) to show on the **Maintenance Plans** as information files for the actual Maintenance process. First we need to create **Folders** where the **Documents** will be stored in the MES.

A	B	C	D	E	F	G	H	I	J	K
Name	Description	ParentFolder								
Process	Documents									
Quality	Documents									
Maintenance	Documents									

Moving to the **Document** tab, the filename must match the names of the documents in the **.zip** file that you are going to load into the system.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Name	Revision	Description	Type	DataGroup	ContentStorageType	RelativeFileLocation	Filename	ContentUri	ChangeDescription	Folder	OwnerRole	DocumentGroup	Author	CreationDate
2 PDF File			Maintenance	Internal	Internal	PDF File.pdf	PDF File.pdf			Maintenance	Administrators	John Doe	12/27/23	
3 Video			Maintenance	Internal	Internal	Video.mp4	Video.mp4			Maintenance	Administrators	John Doe	12/27/23	
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Info

For more information, see [Document](#).

Certifications

Now, let's create **Certifications** to ensure that employees with the proper knowledge are used for the Maintenance procedures. These **Certifications** are used in the Personnel Requirements of the Resource and are validated when executing the **Maintenance Plans**.

A	B	C	D	E	F	G	H	I	J	K	L
Name	Description	Type	IsTemplate	DataGroup	OwnerRole	Documentation	Distribution	NotifyChange	NotifyUsers	AllowManualGrant	IsSelfGrantAllowed
2 Calibration	Calibration Activities	Administrators	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
3 Maintenance Certification	General	Maintenance Technician	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
4 Operator Maintenance Certification	General	Assemble Operator	No	No	Yes	Yes	Yes	Yes	Yes	Yes	Yes
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Info

For more information on **Certifications**, see [Certification](#).

Calendar

Let's continue focusing on the modeling sequence precedence, which dictates that you must create a **Calendar** before you can create the rest of the entities that depend on it.

A	B	C	D	E	F	G	H	I	J	K
Name	Description	DataGroup	TimeZone	ShiftClockInEarlyStart	IsReportingDimension	WeekStartDay	YearStartDay	YearStartMonth	DayStartTime	StartsAtPre
2 Calendar	(UTC+00:00) Dublin, Edinburgh, Lisbon, London				Monday	1	1	7:00:00		
3										
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i Info

For more information, see [Calendar](#).

Teams and Shift Definitions

In this case there are several entities that you need to create. Let's start with **Teams** and **Shift Definitions**.

	A	B	C	D	E	F	G	H	I	J
1	Name	Description	DataGroup	Calendar	Code					
2	Team-A			Calendar	A					
3	Team-B			Calendar	B					
4	Team-C			Calendar	C					
5										
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	A	B	C	D	E	F	G
1	Name	Description	DataGroup	Calendar	StartTime		
2	ShiftPlan			Calendar	7:00:00		
3							
4							
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A	B	C	D	E	F	G	H	I	J	K	L
1	ShiftDefinition	Name	ShiftNumber	StartTime	EndTime	Code	OvertimeCostFactor	TeamPattern	BackgroundColor	ForegroundColor	NonWorkingTimes
2	ShiftPlan	Morning	1	7:00:00 AM	3:00:00 PM	Mo	AAAAABBBBBCCCC#FF73FF00	#FF000000	Name[Lunch]	Start Time[11:00:00.000] End Time[11:30:00.000]	
3	ShiftPlan	Afternoon	2	3:00:00 PM	11:00:00 PM	Af	BBBBBCCCCCAAAA#FF0037B8	#FFFFFF	Name[Dinner]	Start Time[19:00:00.000] End Time[19:30:00.000]	
4	ShiftPlan	Evening	3	11:00:00 PM	7:00:00 AM	Ev	CCCCAAAAABBBB#FF000000	#FFFFFF	Name[Supper]	Start Time[02:00:00.000] End Time[02:30:00.000]	
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< > ... <DM>ShiftDefinition ShiftDefinitionShift <DM>Facility <DM>Service <DM>Area <DM>AreaSupplyArea <DM>AreaTransferRequirementType <DM>Employee <DM>Employee

Info

For more information, see [Shift Definition](#).

Facilities and Areas

And let's continue with **Facilities** and **Areas**. Remember that the creation of the **Facility** takes precedence over the creation of the **Areas** and the other entities.

A	B	C	D	E	F	G	H	I	J	K
1	Name	Description	Type	DataGroup	DisplayOrder	DefaultCalendar	Site	TerminateOnShip	Shipping Facilities	
2	Warehouse	Warehouse Facility	Standard			Calendar	No		Production;Final Customer	
3	Production	Production Facility	Standard			Calendar	No		Warehouse	
4	Final Customer	Final Customer	Standard				Yes			
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< > ... ShiftDefinitionShift <DM>Facility <DM>Service <DM>Area <DM>AreaSupplyArea <DM>AreaTransferRequirementType

A	B	C	D	E	F	G	H	I	J	K	
1	Name	Description	Type	DataGroup	Facility	DisplayOrder	AreaType	ParentArea	DefaultTransferOrderDestinationLocation	Calendar	Schedul
2	Packing	Packing			Warehouse		Area			Calendar	
3	Assemble Preparation	Production			Production		Area			Calendar	
4	Storage Production	Storage			Production		StorageArea	Assemble Preparation			
5	Inspection	Production			Production		Area			Calendar	
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< > ... <DM>Facility <DM>Service <DM>Area <DM>AreaSupplyArea <DM>AreaTransferRequirementType <DM>Employee <DM>EmployeeQualification <DM>EmployeeCertification

i Info

For more information, see [Facility and Area](#).

Employees

In the **Employee** sheet, define the **Calendar** and the **Area** for each **Employee**. Since the Employee Number is a mandatory field, you must use unique values for different employees, which should be a fairly typical situation in most production environments.

A	B	C	D	E	F	G	H	I	J	K	L	
1	User	Name	Description	Type	DataGroup	EmployeeNumber	Area	Calendar	CostPerHour	CostCenter	RequireClockIn	EnableAutomaticClock
2	MAN	Maintenance Manager		Standard		20213		Calendar	0	No	No	No
3	TEC1	Maintenance Technician1		Standard		20223		Calendar	0	No	No	No
4	TEC2	Maintenance Technician2		Standard		20224		Calendar	0	No	No	No
5	QMAN	Quality Manager		Standard		20215		Calendar	0	No	No	No
6	QTEC	Quality Technician		Standard		20216		Calendar	0	No	No	No
7	ENG	Engineer		Standard		20218		Calendar	0	No	No	No
8	OP	Operator		Standard		10198		Calendar	0	No	No	No
9	PMAN	Production Manager		Standard		20198		Calendar	0	No	No	No
10	TL1	Team Leader1		Standard		20199		Calendar	0	No	No	No
11	TL2	Team Leader2		Standard		20200		Calendar	0	No	No	No
12	OP_1	Operator_1		Standard		20201	Packing	Calendar	0	No	No	No
13	OP_2	Operator_2		Standard		20202	Assemble Preparation	Calendar	0	No	No	No
14	OP_3	Operator_3		Standard		20203	Assemble Preparation	Calendar	0	No	No	No
15	OP_4	Operator_4		Standard		20211	Storage Production	Calendar	0	No	No	No
16	OP_5	Operator_5		Standard		20212	Inspection	Calendar	0	No	No	No
17	OP_6	Operator_6		Standard		20204	Assemble Preparation	Calendar	0	No	No	No
18	OP_7	Operator_7		Standard		20205	Assemble Preparation	Calendar	0	No	No	No
19	OP_8	Operator_8		Standard		20206	Assemble Preparation	Calendar	0	No	No	No
20	OP_9	Operator_9		Standard		20207	Assemble Preparation	Calendar	0	No	No	No
21	OP_10	Operator_10		Standard		20208	Assemble Preparation	Calendar	0	No	No	No

i Info

For more information on **Employees**, see [Employee](#).

Personnel Requirements

For Personnel Requirements, use the **Certification** entities created above and fill in the information for each **Certification** in the **EmployeeCertification** sheet.

A	B	C	D	E	F	G	H	I	J
1	Employee	Certification	CertificationTargetDate	GrantCertification	CertificationDate	IsTrained	IsTrained	ValidTie	ExcludeFromScheduling
2	Maintenance Technician1	Maintenance Certification	1/1/2024		2/26/2024	No	No	2/26/2025	No
3	Maintenance Technician2	Maintenance Certification	1/1/2024		2/26/2024	No	No	2/26/2025	No
4	Quality Technician	Calibration	1/1/2024		1/1/2024	No	Yes	3/1/2024	No
5	Operator_1	Operator Maintenance Certification	1/1/2024		2/26/2024	No	No	2/26/2025	No
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i Info

For more information, see [Manage Personnel](#).

Products

Now let's focus on the **Products**, a vital part of the model. For each **Product** you need a **FlowPath**. Considering the modeling sequence, for a **FlowPath** to be created you first need to create the **Steps**,

followed by the **Flows**. After setting up both **Steps** and **Flows**, you can populate the **FlowItems** sheet to create (and subsequently load) the desired **Flow** structure. This process establishes the proper sequence necessary for the creation of **FlowPaths**.

Steps and Flows

A	B	C	D	E	F	G	H	I	J	K	L	
1	Name	Description	Type	IsTemplate	DataGroup	ProcessingType	DisplayOrder	StepViewSortRuleSet	SortRuleSet	LotTraveler	MaterialLabel	IsPassThrough
2	Components Reception		Logistic			Logistic						Yes
3	Incoming		Metrology			Metrology						Yes
4	Incoming Complete		Logistic			Logistic						Yes
5	Warehouse Store		Logistic			Logistic						Yes
6	Warehouse Parts Store		Logistic			Logistic						Yes
7	Production Parts Store		Logistic			Logistic						Yes
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9												
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< > ... <DM>BusinessPartner | <DM>Reason | **<DM>Step** | <DM>StepReason | <DM>Flow | FlowItems | <DM>Parameter | <GT>MoistureSensitivityLevel

A	B	C	D	E	F	G	H	I	J	
1	Name	Revision	Description	Type	DataGroup	IsNonSequentialBlock	IsAlternate	IsLineFlow	AlternateFlowSelectionType	IsEnabled
2	Flow_Warehouse_Store			Components	No	No	No	No		Yes
3	Flow_Production Raw Material			Components	No	No	No	No		Yes
4	Flow_Warehouse_Parts			Parts	No	No	No	No		Yes
5	Flow_Production Parts			Parts	No	No	No	No		Yes
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21										

< > ... <DM>Step | <DM>StepReason | **<DM>Flow** | FlowItems | <DM>Parameter | <DM>ProductGroup | <GT>MoistureSensitivityLevel | <

A	B	C	D	E	F	G	H	I	J	K	L	
1	Flow	Type	Target	IsOptional	Reworks	IsLine	IsSkippable	LineFlows	LogicalName	OnEnterRule	OnExitRule	ConditionType
2	Flow_Warehouse_Store	Step	Incoming	No		No	No					
3	Flow_Warehouse_Store	Step	Incoming Complete	No		No	No					
4	Flow_Warehouse_Store	Step	Warehouse Store	No		No	No					
5	Flow_Warehouse_Parts	Step	Incoming	No		No	No					
6	Flow_Warehouse_Parts	Step	Incoming Complete	No		No	No					
7	Flow_Warehouse_Parts	Step	Warehouse Parts Store	No		No	No					
8	Flow_Production Raw Material	Step	Components Reception	No		No	No					
9	Flow_Production Parts	Step	Production Parts Store	No		No	No					
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< > ... <DM>Flow | **FlowItems** | <DM>Parameter | <DM>ProductGroup | <GT>MoistureSensitivityLevel | <DM>Product | ProductParameters | Product

**Note**

As a fresh reminder, **Steps** must be created before **Flows**. For more information, please see [Flow Modeling](#).

Product

We can now create the **Products**, using the entries created in the **FlowStructures** sheet and strictly following the **FlowPath** notation used throughout the system:

Flow:RevisionName:CorrelationId/Flow:RevisionName:CorrelationId/.../Step:CorrelationId.

Info

For more information, see [Flow](#).

A	B	C	D	E	F	G	H	I	J	K	L	
1	Name	Revisi	Description	Type	IsTempla	DataGro	FlowPath	ProductType	ProductGro	DefaultUnits	DefaultMaterialType	DefaultMaterialForm
2	Oil Pump Filter		Oil Pump Filter	Part			Flow_Warehouse_Parts:1/Incoming:1 Part		Unit	Part	Batch	
3	Hydraulic Oil		Hydraulic Oil	Part			Flow_Warehouse_Parts:1/Incoming:1 Part		Lts	Part	Batch	
4	Mold Runner		Mold Runner	Part			Flow_Warehouse_Parts:1/Incoming:1 Part		Unit	Part	Batch	
5	Mold Connector		Mold Connector	Part			Flow_Warehouse_Parts:1/Incoming:1 Part		Unit	Part	Batch	
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Services and Resources

Continuing to follow the modeling sequence, let's create the **Services** followed by the **Resources**.

A	B	C	D	E	F	G	H	I
1	Name	Description	Type	DataGroup	ProcessingType	IsEnabled		
2	WH_Storage Parts		Standard		Storage	Yes		
3	Production_Storage Parts		Standard		Storage	Yes		
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A	B	C	D	E	F	G	H	I
Name	Description	Type	MainStateModel	IsTemplate	DataGroup	ProcessingType	Area	Prior
2 Scale_1	Scale	Scale	SEMI E10 >Standby			Instrument	Assemble Preparation	
3 Trolley_1	Warehouse Trolley for Picking Operation - Raw Material	Picking	SEMI E10 >Standby			Storage	Storage Production	
4 Trolley_2	Warehouse Trolley for Picking Operation - Maintenance	Picking	SEMI E10 >Standby			Storage	Storage Production	
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After these two entities are created, let's proceed in creating the link between **Resources** and **Services** in the **ResourceService** sheet.

A	B	C	D	E	F
SourceEntity	TargetEntity	Priority	IsEnabled		
2 Trolley_1	WH_Storage Parts		Yes		
3 Trolley_2	Production_Storage Parts		Yes		
4					
5					
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Data Collection

We want to add a **Data Collection** to measure some parameters during the quality control phase of the process. Before adding any **Parameters** to a **Data Collection**, create the **Parameters** it will use when recording data.

Info

For more information, see [Data Collection](#).

Parameters

Let's create the **Data Collection**.

	A	B	C	D	E	F	G
1	Name	Revision	Description	Type	DataGroup	Scope	SPCPostMode
2	DC Maintenance			Standard		General	OnClosePerSample
3							
4							
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And now we can use those **Parameters** and add them to the **Data Collection** using the **DataCollectionParameters** sheet.

BOM

The maintenance process typically requires a **BOM** (Bill-of-Materials) to replace faulty parts in the processing **Resources**. Let's start with creating the base **BOM**.

A	B	C	D	E	F	G	H	I	J	K	
Name	Revision	Description	Type	DataGroup	Scope	Product	BaseQuantity	EnforcePackageQuantity	Units	DrawingFile	WeighAnd
BOM Machine Maintenance		BOM Injection Machines Annual	Standard			Parts					
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BOM Items

With the **BOM** created, we can add the **Products** that will be used as **BOM Items**.

A	B	C	D	E	F	G	H	I
BOM	Order	SourceProduct	BinCode	LowerTolerance	Quantity	UpperTolerance	Units	Step
BOM Machine Maintenance	1	Oil Pump Filter			1		Lts	Production Parts Store
BOM Machine Maintenance	2	Hydraulic Oil			3.2		Unit	Production Parts Store
BOM Machine Maintenance	3	Mold Runner			1		Unit	Production Parts Store
BOM Machine Maintenance	4	Mold Connector			1		Unit	Production Parts Store
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Note

For more information, see [Bill-Of-Materials \(BOM\)](#).

Checklist

To list all the work that will be done during this maintenance process, we can add a **Checklist** to our model to help our maintenance technician. Let's start by creating the base **Checklist** object.

A	B	C	D	E	F	G	H	I
Name	Description	Type	DataGroup	Scope	ExecutionMode	BOM	DataCollection	
Maintenance	Maintenance	Standard		MaintenanceManagement	LongRunning	BOM Machine Maintenance	DC Maintenance	
3								
4								
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Note

For more information, see [Checklist](#).

Checklist Items

Similar to what we did earlier with the **BOM**, let's add **Checklist Items** to indicate what will be done during the execution of the **Checklist**.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Checklist	Name	Type	Group	DocumentationURI	ActivityType	TrackingType	ValidFrom	ValidTo	IsFloating	IsOptional	Rule	Instruction	DiagramFile
2	Maintenance	Oil Filter Cleaning				ManualTask	End			No	Yes		[[Image.PNG]]	
3	Maintenance	Check tool				ManualTask	End			No	Yes		Open Video.	
4	Maintenance	Visual inspection				Signature	End			No	No		Check PDF File.	
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Checklist Item BOM Items

Since the proper completion of some of the **Checklist Items** require the use of Parts to perform the maintenance activity, let's add those Parts (which are modeled as **BOM Items**) to the **ChecklistItemBOMItems** sheet.

A	B	C	D	E	F	G	H
1	Checklist	ItemName	Product	BOMItemNumber	Quantity	Color	
2	Maintenance	Oil Filter Cleaning	Oil Pump Filter	1	#3380FF		
3	Maintenance	Check tool	Hydraulic Oil	3.2	#FF7133		
4	Maintenance	Check tool	Mold Runner	1	#8C3232		
5	Maintenance	Check tool	Mold Connector	1	#fe0b0b		
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Checklist with Data Collection

To gather more data from the process, let's associate a **Data Collection** with the same **Checklist** under the same **Maintenance Plan** by filling the appropriate values in the **ChecklistItemDataColParameters** sheet.

A	B	C	D	E	F	G
1	Checklist	ItemName	Parameter	FromSample	ToSample	
2	Maintenance	Check tool	Machine Pressure	1	1	
3	Maintenance	Check tool	Liquid Output	1	1	
4	Maintenance	Check tool	Liquid Pressure	1	1	
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Checklist Item Signatures

Adding some extra process security and bulking up the approval process, let's add a mandatory signature to one of the **Checklist Items** by using the **ChecklistItemSignatures** sheet.

A	B	C	D	E	F	G
Checklist	ItemName	SignatureText	SignatureRole	SignatureCertification	SignatureAllowSel	
1 Maintenance	Visual inspection	Verified by:	MD Maintenance Manager		No	
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						

Maintenance Plan

Finally, after creating all these entities, it's time to create the actual **Maintenance Plan**.

A	B	C	D	E	F
Name	Revision	Description	Type	DataGroup	
1 Machine Maintenance			Standard		
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

Note

For more information, see [Maintenance Plan](#).

Maintenance Activities

A Maintenance Plan is composed of a number of Maintenance Activities, that you can define in the **MaintenancePlanActivities** sheet.

A	B	C	D	E	F	G	H
MaintenancePlan	Order	Name	Description	Type	ScheduleType	ExpectedDuration	Role
1 Machine Maintenance	1	Annual Maintenance	Annual Maintenance	Standard	TimeBased	8	Maintenance Technician
2							
Machine Maintenance	2	Weekly Maintenance	Weekly Maintenance	Standard	TimeBased	1	Maintenance Technician
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							

Associating the **Checklist**, **Data Collection** and **BOM** is done in this same **MaintenancePlanActivities** sheet, using the appropriate columns.

	A	B	C	D	E	AN	AO	AT
1	MaintenancePlan	Order	Name	Mode	Checklist	DataCollection		BOM
2	Machine Maintenance	1	Annual Maintenance	Complete	Maintenance	DC Maintenance	BOM Machine Maintenance	
3	Machine Maintenance	2	Weekly Maintenance	Complete	Maintenance	DC Maintenance	BOM Machine Maintenance	

Maintenance Activity Documents

To add a **Document** to a specific Maintenance Activity, use the **MaintenanceActivityDocument** sheet.

	A	B	C	D	
1	MaintenancePlan	ActivityName	Order	Document	
2	Machine Maintenance	Annual Maintenance	1	PDF File	
3	Machine Maintenance	Weekly Maintenance	2	Video	
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					

< > ... **MaintenanceActivityDocument** IncludedActivities ActivityPersonnelRequirements <DM>M

Let's also specify the Personnel Requirements for the **Maintenance Activities**.

	A	B	C	D	E	F	G	H
1	MaintenancePlan	ActivityName	Certification	Quantity	Allocation	Exclusive		
2	Machine Maintenance	Annual Maintenance	Maintenance Certification	2	1	No		
3	Machine Maintenance	Weekly Maintenance	Maintenance Certification	1	1	No		
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								

< > ... IncludedActivities **ActivityPersonnelRequirements** <DM>MaintenancePlanInstance MaintenancePlanInstanceActivity <GT>GUIElement

Loading the model

With the entire process completed, you just need to compress all the pertinent files, including the Excel template and other images, into a **.zip** file. This is the file you will use to load the data into the system.



Name	Type	Compressed size	Password ...	Size
Image	PNG File	142 KB	No	142 KB
MD 10.2 Use Case	Microsoft Excel Worksheet	2,256 KB	No	3,593 KB
PDF File	Microsoft Edge PDF Docu...	382 KB	No	387 KB
Video	MP4 File	5,986 KB	No	5,995 KB

To complete the process, see [Loading the Model](#) for information on how to load the model.



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