![Version 9.0]

Routine Cards Setup

TITLE:	Routine Cards Setup		
PART:	Quality		
MODULE:	Aircraft Record Keeping Module	BUILD	9.0.1.42
RESPONSIBILITY:	Procedures Specialist, Pentagon 2000	REVISION:	00
APPROVED BY:	Vice President, Operations, Pentagon 2000	EFFECTIVE DATE:	10/14/2014

Purpose

The Pentagon 2000 system allows the creation and configuration of aircraft cards that occur on a routine basis. This feature enables more efficient creation of aircraft maintenance work orders related to maintenance that occurs regularly. Links may be created to automatically populate the following on the maintenance work order:

- Parts that will be removed and/or installed during the maintenance,
- A detailed list of tasks that must be performed in order to complete the maintenance,
- Tools that will be required to complete the maintenance,
- A list of skilled labor that must be completed during the maintenance,
- A list of costs that should be expected when conducting the maintenance,
- A list of the required sign-offs required to complete the maintenance,
- Access to relevant documents stored electronically,
- Planning tools related to costs, charges, and labor.

Overview

This procedure outlines the steps for creating a routine card.

Required Modules/Features

- Pentagon 2000 Core
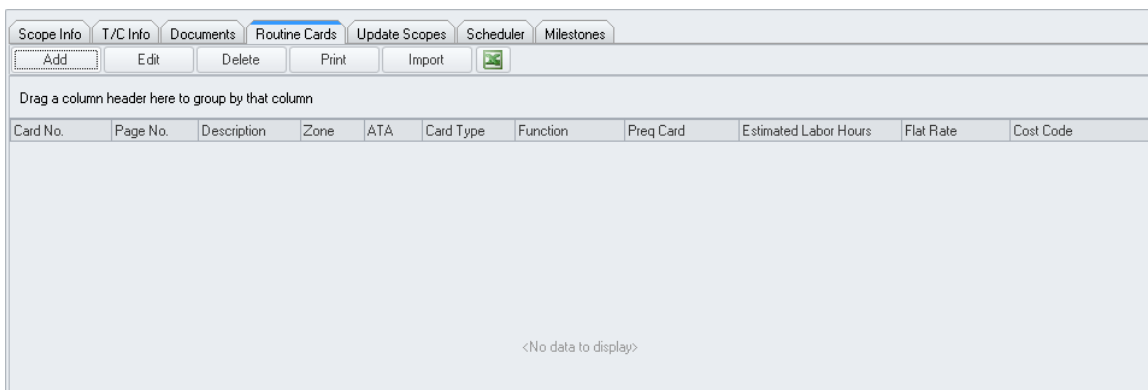- Aircraft Record Keeping

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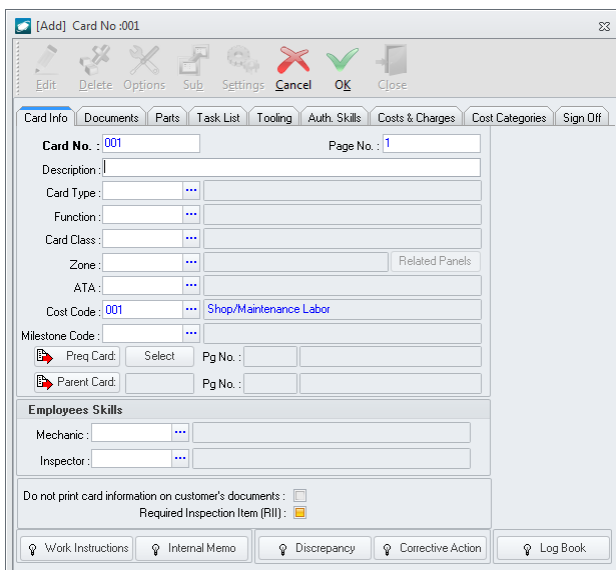
Procedure

1. Create and Link to Scopes

Routine cards are created to be automatically added to maintenance work orders associated with the scope. All data entered in the card associated with the scope are meant to be default values, and may be adjusted as necessary in aircraft records and on maintenance work orders.

> **NOTE:** *The procedure outlined within this manual applies to linking cards to all scopes regardless of where they appear and regardless of whether or not the Aircraft Standard Configuration module is being utilized.*

a. From the **Scope** window toolbar, left-click the **Edit** button.

b. Left-click the **Routine Cards** tab.

c. While the **Scopes** window is in edit mode, left click the **Add** button on the **Routine Cards** tab toolbar.

d. The **Card** window will appear.

i. **Card Info** tab

1. **Card No** field [REQUIRED] – This field is automatically populated but may be overwritten. [20-character maximum]

2. **Page No** field – Enter the page number that should be assigned to the card.

3. **Description** field – Enter a short summary of the tasks completed on the card.

4. **Card Type** field – Select the applicable card type.

5. **Function** field – Select the applicable function.

6. **Card Class** field – Select the applicable card class.

7. **Zone** field – Select the applicable zone.

8. **Related Panels** button – Left-click to view the panels associate with the selected zone.

9. **ATA** field – Select the applicable ATA code.

10. **Cost Code** field [REQUIRED] – Select the cost code that you would like populated in the **Cost Code** field when tracking labor against the card.

11. **Preq Scope** field **Select** button – Left-click to select a card that must be completed before the card can be completed.

12. **Parent Card** field – Will be populated by the parent card information if the card being created is a sub-card.

13. **Employees Skills** group box

    a. **Mechanic** field – Identify a particular skill that all mechanics must possess to perform the maintenance activity under the card, if necessary.

    b. **Inspector** field – Identify a particular skill that the inspector must possess to sign as inspector on the card, if necessary.

14. **Do not print card information on customer's documents** flag – Ensure the flag is marked as "checked" if you do not want card information printed on documents that are normally printed for, or transmitted to, customers.

15. **Required Inspection Items (RII)** flag – Ensure the flag is marked as "checked" if the card should be classified as a required inspection item.

16. **Work Instructions** button – Left-click to open the memo editor; enter any information relevant to the manner in which the maintenance identified by this card is to be performed. In general, this button is used for scheduled maintenance.

17. **Internal Memo** button – Left-click to open the memo editor; enter any information relevant to the completion of the maintenance identified by this card. In general, this button is used for scheduled maintenance.

18. **Discrepancy** button – Left-click to open the memo editor; enter any information relevant to the discrepancy found which needs to be corrected by the maintenance identified by this card. In general, this button is used for unscheduled maintenance.

19. **Corrective Action** button – Left-click to open the memo editor; enter any information relevant to the corrective action required to correct the discrepancy identified by this card. In general, this button is used for unscheduled maintenance.

20. **Logbook** button – Left-click to open the memo editor; enter any information that should be present in the aircraft logbook as a result of performing the maintenance identified by this card.
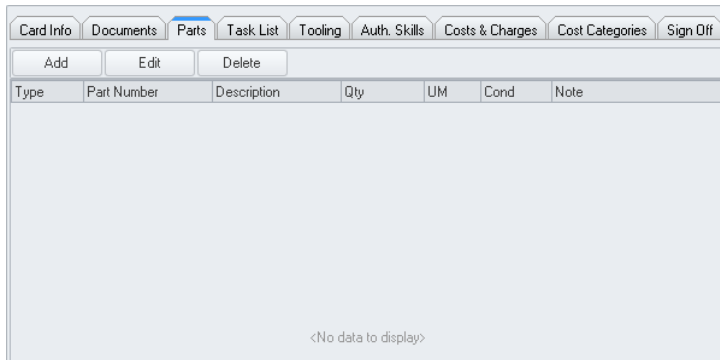
ii. **Documents** tab
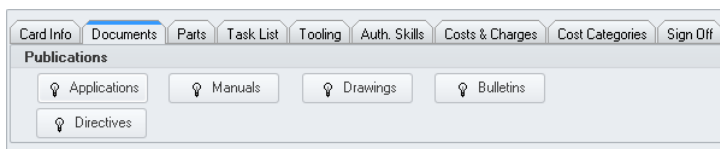
Link publications using the instructions outlined in the procedure "Publications (Core System)" within the General System section of this manual.

NOTE: If the Publication Management module is being used, links to all publications are made from the Publications Management module. This procedure describes the steps for linking publications without the Publications Management module. Instructions for linking items to publications from the Publications Management module may be found in the procedure "Publication Management Module" within the General System section of this manual.

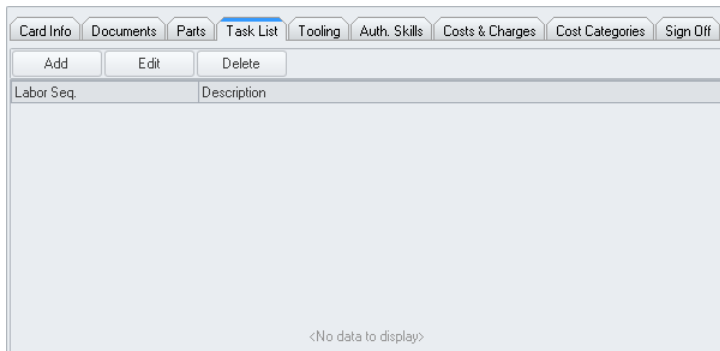*CONTINUE TO NEXT PAGE*

iii. **Parts** tab

Parts may be linked to cards so that they are automatically added to those cards within maintenance work orders. Refer to the *Link Parts* section of this procedure for detailed instructions.
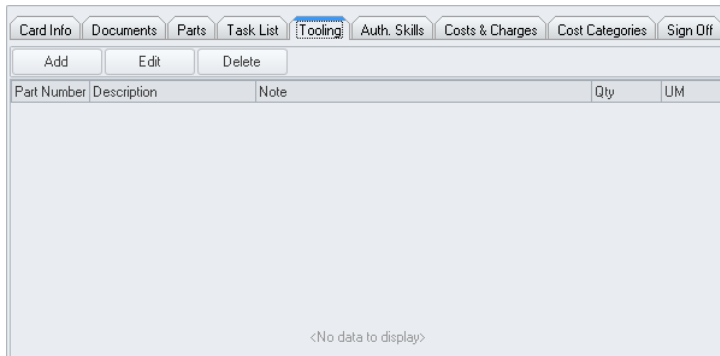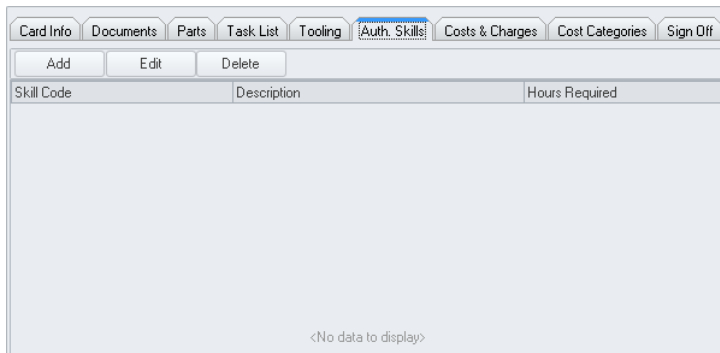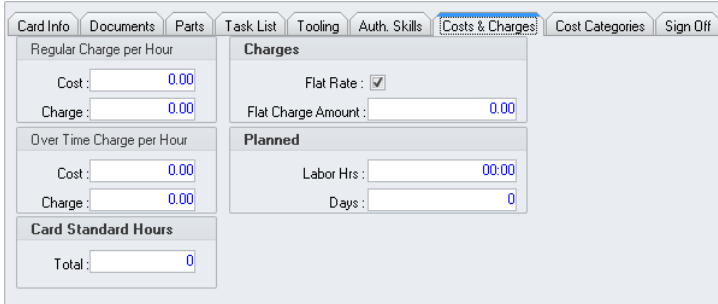

iv. **Task List** tab

Tasks may be linked to cards so that they are automatically added to those cards within maintenance work orders. Refer to the *Link Tasks* section of this procedure for detailed instructions.

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v. **Tooling** tab

Tools may be linked to cards so that they are automatically added to those cards within maintenance work orders. Refer to the *Link Tools* section of this procedure for detailed instructions.

vi. **Auth. Skills** tab

Skills may be linked to cards so that they are automatically added to those cards within maintenance work orders. Refer to the *Link Skills* section of this procedure for detailed instructions.

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vii. **Costs & Charges** tab

1. **Regular Charges per Hour** group box

    a. **Cost** field – Enter the standard cost per labor hour for work performed on this card when the work is being performed during regular hours. Cost relates to the amount your organization must spend.

    b. **Charge** field – Enter the standard charge per labor hour for work performed on this card when the work is being performed during regular hours. Charge relates to the amount charged to your customer.

2. **Over Time Charges per Hour** group box

    a. **Cost** field – Enter the standard cost per labor hour for work performed on this card when the work is being performed during overtime hours. Cost relates to the amount your organization must spend.

    b. **Charge** field – Enter the standard charge per labor hour for work performed on this card when the work is being performed during overtime hours. Charge relates to the amount charged to your customer.

3. **Card Standard Hours** group box

    a. **Total** field – Enter the number of labor hours that are required to perform the work identified by the card under normal circumstances.

4. **Charges** group box

    a. **Flat Rate** flag – Ensure the flag is marked as "checked" when the charge to the customer is to be a flat rate amount, regardless of the number of labor hours expended to complete the work.

    b. **Flat Charge Amount** field – Enter the amount that the customer is to be charged, regardless of the number of labor hours expended to complete the work.
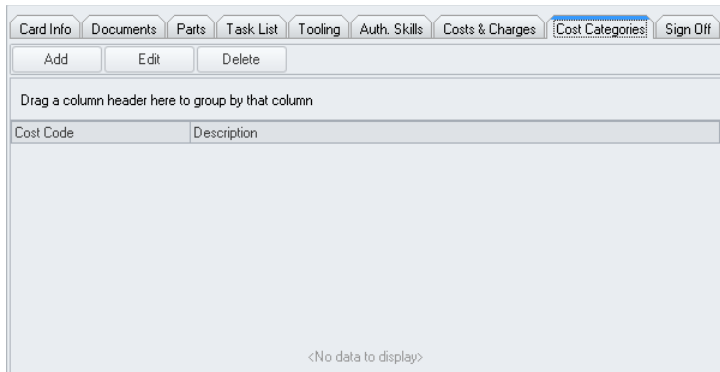

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5. **Planned** group box

   a. **Labor Hrs** field – Enter the number of labor hours that are required to perform the work identified by the card under normal circumstances.

   b. **Days** field – Enter the number of working days that are required to perform the work identified by the card under normal circumstances.
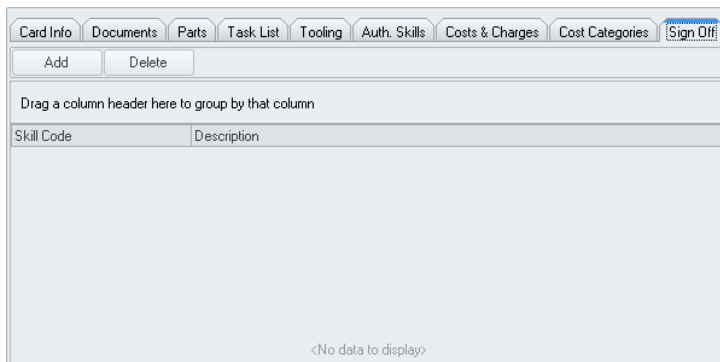
viii. **Cost Categories** tab

Cost Codes may be linked to cards so that they are automatically added to those cards within maintenance work orders. Refer to the *Link Cost Codes* section of this procedure for detailed instructions.

ix. **Sign Off** tab

Sign offs may be linked to cards so that they are automatically added to those cards within maintenance work orders. Refer to the *Create Sign-off Requirements* section of this procedure for detailed instructions.
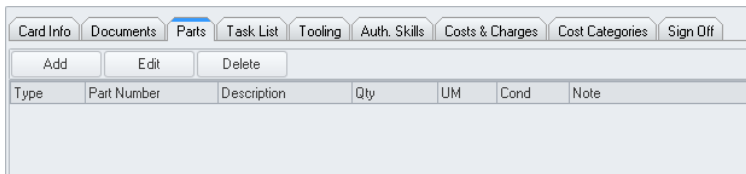

END OF SECTION

2. Link Parts

Parts are linked to the routine card to reduce the amount of manual part entry on the maintenance work order and to ensure uniformity of the documentation for cards that are performed repeatedly.

a. From the **Card** window, left-click the **Parts** tab.

b. <u>Link a Part to the Card</u>

   i. While the **Card** window is in edit mode, left-click the **Add** button on the **Parts** tab toolbar

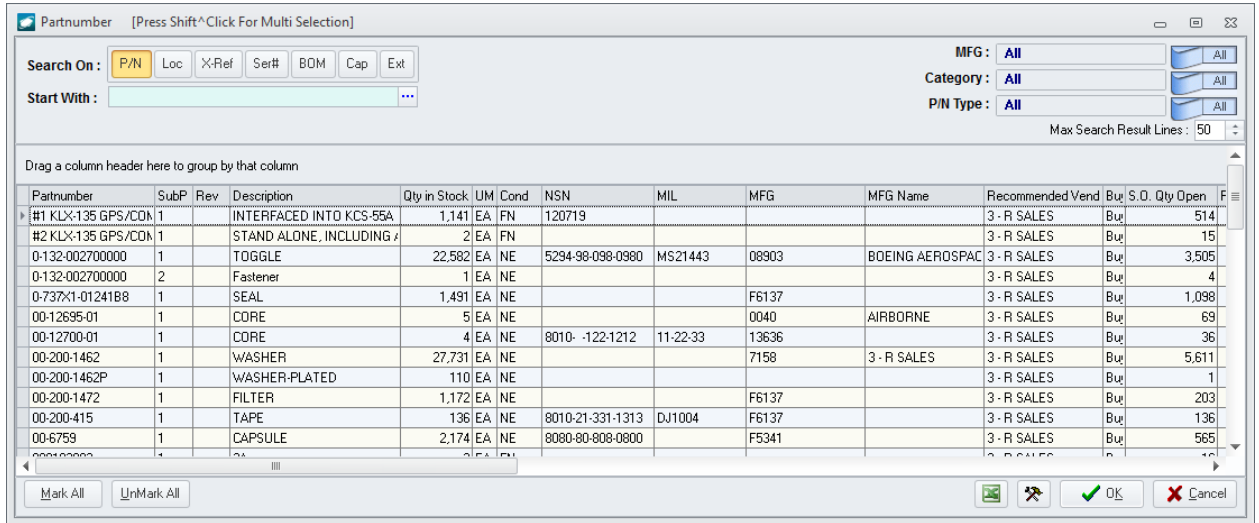   ii. A menu will appear with three (3) options:
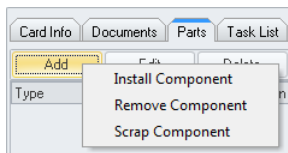
   1. **Install Component** option – Select to identify a part number that will be installed on the aircraft in the performance of the maintenance identified by this card. This will create a line type 32 on the card when the card exists on a work order.

   2. **Remove Component** option – Select to identify a part number that will be removed from the aircraft in the performance of the maintenance identified by this card. This will create a line type 33 on the card when the card exists on a work order.

   3. **Scrap Component** option – Select to identify a part number that will be removed from the aircraft and disposed of in the performance of the maintenance identified by this card. This will create a line type 34 on the card when the card exists on a work order.

   iii. Left-click the appropriate option.

> **NOTE:** *In this procedure we will use the Install Component option as an example; however, all options follow the same procedure.*

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iv. The **Partnumber** search window will appear.

v.   Select the appropriate part number(s) (left-click the line(s) within the search window and left-click OK).

vi. If Install Component was selected, a dialog box will appear with the following message:
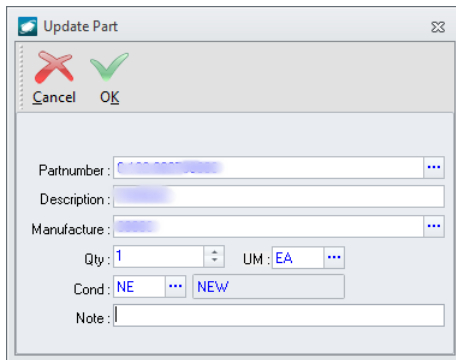

vii. Left-click the **OK** button.

viii. The selected part will be added to the grid.

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c. Edit a Part on the Card

    i. While the **Card** window is in edit mode, left-click the part that you would like to edit within the grid and left-click the **Edit** button on the **Parts** tab toolbar.

    ii. The **Update Part** window will appear.

1. **Partnumber** field – Select the appropriate part number.

2. **Description** field – This field is populated automatically from the parts master file; however, it may be modified if necessary.

3. **Manufacture** field – This field is populated automatically from the parts master file; however, it may be modified if necessary.

4. **Qty** field – This field is always populated with the value of "1". Enter the appropriate value.

5. **UM** field – This field is populated automatically from the parts master file. This value should not be modified.

6. **Cond** field – This field is populated automatically from the parts master file; however, it may be modified if necessary. Select the default condition for the part that is to be installed, removed, or scrapped.

7. **Note** field – Enter a short note that will be copied to the parts line on the card.

    iii. Press the **OK** button on the **Update Part** window toolbar to save the record and close the window.

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d. Delete a Part from the Card

    i. While the **Card** window is in edit mode, left-click the part that you would like to edit within the grid and left-click the **Delete** button on the **Parts** tab toolbar.

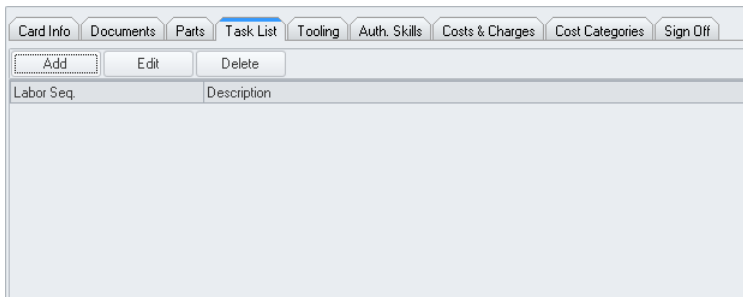   ii. The **Confirm** dialog box will appear with the following message:
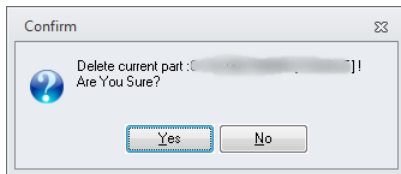
    iii. Left-click the **Yes** button.

    iv. The line will be removed.

END OF SECTION

3. Link Tasks
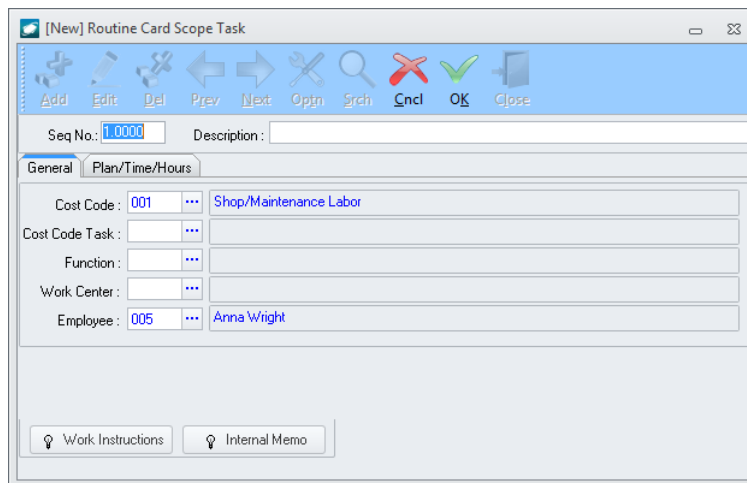
Tasks are linked to the routine card to reduce the amount of manual task entry on the maintenance work order and to ensure uniformity of the documentation for cards that are performed repeatedly.

a. From the **Card** window, left click the **Task List** tab.

b. Link a Task to the Card.

  i. While the **Card** window is in edit mode, left-click the **Add** button on the **Task List** tab toolbar.

  ii. The **Routine Card Scope Task** window will appear.

    1. Header

      a. **Seq No.** field – This field will be automatically populated but may be modified as necessary. Enter a number that represents the order in which the tasks should be completed.

      b. **Description** field – Enter a short description of the task.

    2. **General** tab

      a. **Cost Code** field – This field will be populated with the cost code selected on the **Card Info** tab of the **Card** window.

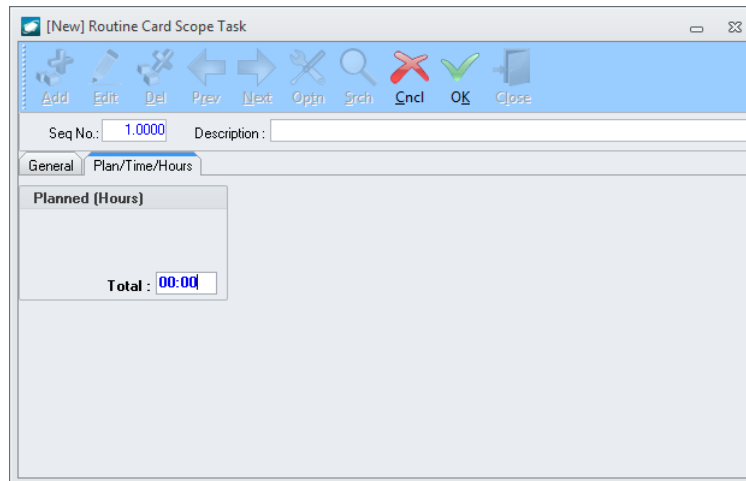b. **Cost Code Task** field – Select the appropriate cost code task.

c. **Function** field – Select the appropriate function.

d. **Work Center** field – Select the appropriate work center.

e. **Employee** field – Select the user who is most likely to perform the task.

f. **Work Instructions** button - Left-click to open the memo editor; enter any information relevant to the manner in which the task should be performed.

g. **Internal Memo** button – Left-click to open the memo editor; enter any information relevant to the completion of the task.

3. **Plan/Time/Hours** tab

a. **Planned (Hours)** group box

   i. **Total** field – Enter the total number of labor hours that the task is expected to take to complete.

iii. Left-click the **OK** button on the **Routine Card Scope Task** window toolbar to save the record.

iv. Left-click the **Close** button on the **Routine Card Scope Task** window toolbar to close the window.

v. The task will appear in the grid on the **Task List** tab.

c. Edit an Existing Task Linked to the Card

   i. While the **Card** window is in edit mode, left-click the task that you would like to edit within the grid and left-click the **Edit** button on the **Task List** tab toolbar.

   ii. The **Routine Card Scope Task** window will appear.

iii. Left-click the **Edit** button on the **Routine Card Scope Task** window toolbar.

iv. Modify the details as necessary.

v. Left-click the **OK** button on the **Routine Card Scope Task** window toolbar to save the record.

vi. Left-click the **Close** button on the **Routine Card Scope Task** window toolbar to close the window.

d. Delete an Existing Task Linked to the Card.

i. While the **Card** window is in edit mode, left-click the task that you would like to delete within the grid and left-click the **Delete** button on the **Task List** tab toolbar.

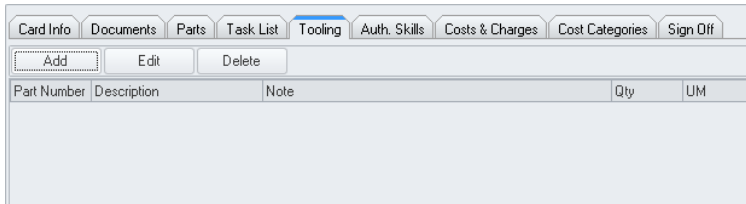ii. An **Information** dialog box will appear with the following message:
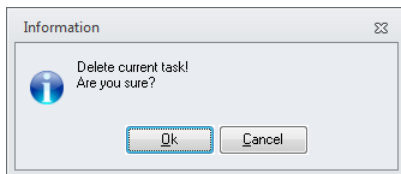
iii. Left-click the **OK** button.

iv. The task will be removed from the grid on the **Task List** window.

END OF SECTION

4. Link Tools

Tools are linked to the routine card to reduce the amount of manual tool entry on the maintenance work order and to ensure uniformity of the documentation for cards that are performed repeatedly.
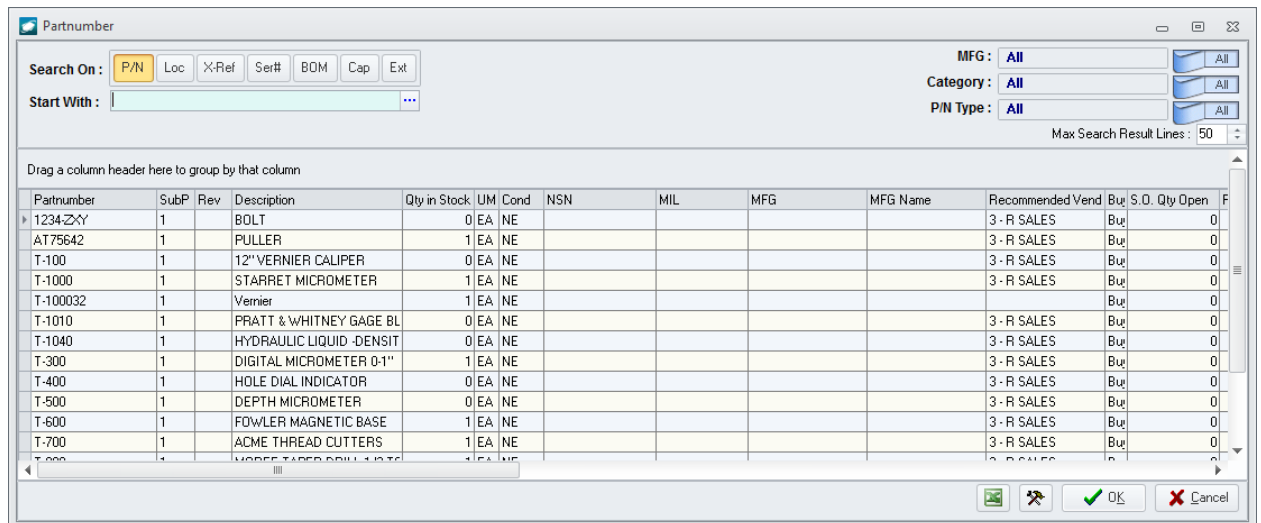
a. From the **Card** window, left click the **Tooling** tab.

b. <u>Link a Tool to the Card</u>

i. While the **Card** window is in edit mode, left-click the **Add** button on the **Tooling** tab toolbar.

ii. The **Partnumber** search window will appear displaying only parts identified as a tool or equipment/machine.



iii. Select the appropriate tool (left-click the line within the search window and left-click OK; or double-click the line within the search window).

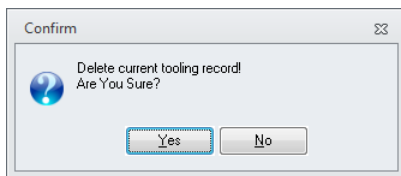iv. The tool will appear in the grid on the **Tooling** tab.

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c. Edit an Existing Tool Linked to the Card

    i. While the **Card** window is in edit mode, left-click the tool that you would like to edit within the grid and left-click the **Edit** button on the **Tooling** tab toolbar.

    ii. The **Tool Note** window will appear
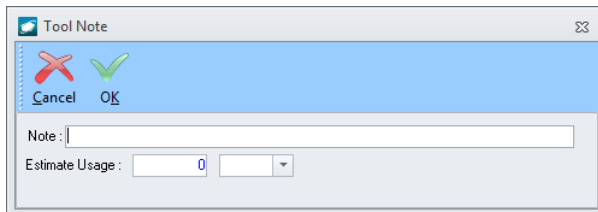
        1. **Note** field – Enter any relevant information about the tool.

        2. **Estimate Usage** fields – Enter a numeric value and select a unit of measure that represents the amount of time the tool will need to be checked out in order to perform the work identified by the card.

    iii. Left-click the **OK** button on the **Tool Note** window toolbar to save the record and close the window.

d. Delete an Existing Tool Linked to the Card

    i. While the **Card** window is in edit mode, left-click the tool that you would like to delete within the grid and left-click the **Delete** button on the **Tooling** tab toolbar.

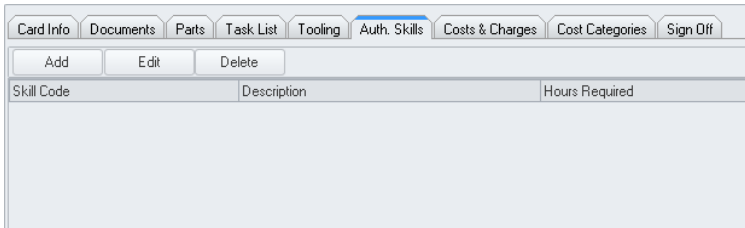   ii. A **Confirm** dialog box will appear with the following message:

    iii. Left-click the **OK** button.

    iv. The task will be removed from the grid on the **Tooling** window.

END OF SECTION

5. Link Skills

Skills are linked to the routine card to reduce the amount of manual skill entry on the maintenance work order and to ensure uniformity of the documentation for cards that are performed repeatedly.
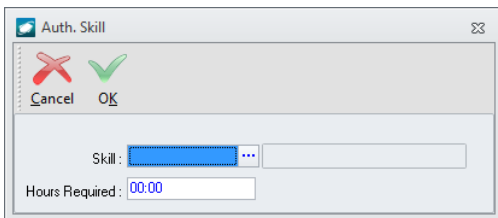
a. From the **Card** window, left click the **Auth. Skills** tab.
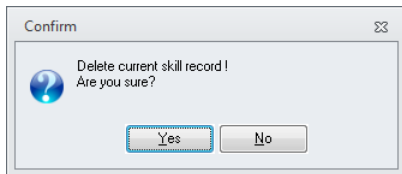

b. Link a Skill to the Card.

   i. While the **Card** window is in edit mode, left-click the **Add** button on the **Auth. Skills** tab toolbar.

   ii. The **Auth. Skill** window will appear.

     1. **Skill** field – Select the appropriate skill.

     2. **Hours Required** field – Enter the number of labor hours of the skill that is required to complete the work identified on the card.

   iii. Left-click the **OK** button on the **Auth. Skill** window toolbar to save the record and close the window.

   iv. The skill will appear in the grid on the **Tooling** tab.

c. Edit an Existing Skill Linked to the Card

   i. While the **Card** window is in edit mode, left-click the skill that you would like to edit within the grid and left-click the **Edit** button on the **Auth. Skills** tab toolbar.

   ii. The **Auth. Skill** window will appear.

   iii. Modify the details as necessary.

   iv. Left-click the **OK** button on the **Auth. Skills** window toolbar to save the record and close the window.

d. Delete an Existing Skill Linked to the Card.

 i. While the **Card** window is in edit mode, left-click the skill that you would like to delete within the grid and left-click the **Delete** button on the **Auth. Skills** tab toolbar.

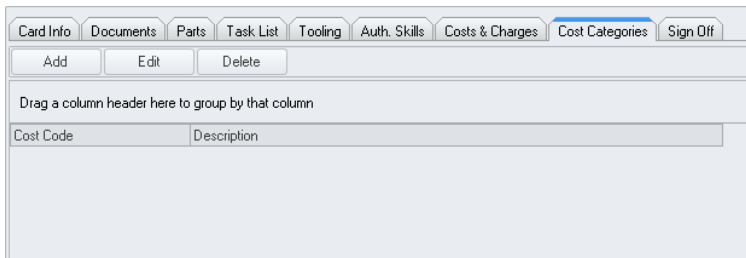 ii. A **Confirm** dialog box will appear with the following message:

 iii. Left-click the **Yes** button.

 iv. The skill will be removed from the grid on the **Auth. Skills** window.

END OF SECTION
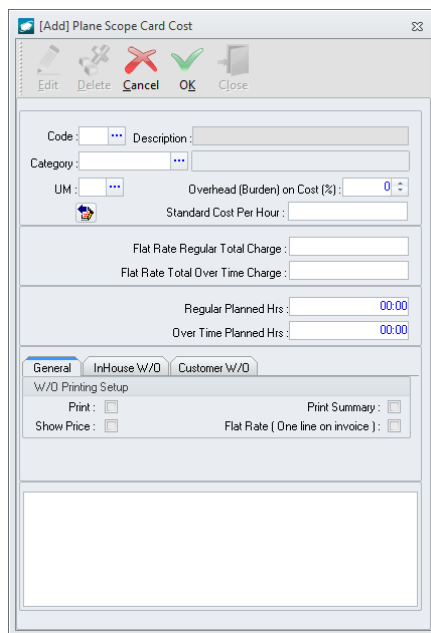
6. Link Cost Codes

Cost codes are linked to the routine card to reduce the amount of manual code entry on the maintenance work order and to ensure uniformity of the documentation for cards that are performed repeatedly.

a. From the **Card** window, left click the **Cost Categories** tab.

b. <u>Link a Cost Code to the Card</u>

    i. While the **Card** window is in edit mode, left-click the **Add** button on the **Cost Categories** tab toolbar.

    ii. The **Plan Scope Card Cost** window will appear.

    1. **Code** field – Select the appropriate cost code. When this code is selected, all fields that exist in the cost code table will be automatically populated; most will allow modification.

    2. **Description** field – This field will be automatically populated from the cost code table and may not be modified.

    3. **Category** field – Select the appropriate category.

4. **UM** field – Select the appropriate unit of measure.

5. **Overhead (Burden) on Cost (%)** field – Enter the percentage of the cost associated with the cost code that should be added to the burden cost.

6. **Standard Cost Per Hour** field – Enter the default cost per hour for the cost code.

7. **Flat Rate Regular Total Charge** field – Enter the default regular hourly rate that will be charged when the cost code is used.

8. **Flat Rate Total Over Time Charge** field – Enter the default overtime hourly rate that will be charged when the cost code is used.

9. **Regular Planned Hrs** field – Enter the number of planned regular labor hours.

10. **Over Time Planned Hrs** field – Enter the number of planned overtime labor hours.

11. GL Accounts group box

    a. **General** tab

        i. **Print** flag – Ensure the flag is marked as "checked" to print information about the cost code on work order documents that will be provided to the customer.

        ii. **Show Price** flag – Ensure the flag is marked as "checked" to print the price by cost code.

        iii. **Print Summary** flag – Ensure the flag is marked as "checked" to print only a summary of the cost code instead of the details.

        iv. **Flat Rate (One line on invoice)** flag – Ensure the flag is marked as "checked" to print only the flat rate price identified previously for the cost code.

    b. **InHouse W/O** tab

        i. **Regular Hours GL Account** field – Select the GL Account that should be used for regular hours associated with the cost code.

        ii. **Overtime Hours GL Account** field – Select the GL Account that should be used for overtime hours associated with the cost code.

        iii. **Work in Process GL Account** field – Select the GL Account that should be used for work in process hours associated with the cost code.

    c. **Customer W/O** tab

        i. **Regular Hours GL Account** field – Select the GL Account that should be used for regular hours associated with the cost code.

ii. **Overtime Hours GL Account** field – Select the GL Account that should be used for overtime hours associated with the cost code.

iii. **Work in Process GL Account** field – Select the GL Account that should be used for work in process hours associated with the cost code.

12. Memo field – Enter any information related to the cost code.

iii. Left-click the **OK** button on the **Plan Scope Card Cost** window toolbar to save the record.

iv. Left-click the **Close** button on the **Plan Scope Card Cost** window toolbar to close the window.

v. The cost code will appear in the grid on the **Cost Categories** tab.

c. <u>Edit an Existing Cost Code Linked to the Card</u>

i. While the **Card** window is in edit mode, left-click the cost code that you would like to edit within the grid and left-click the **Edit** button on the **Cost Categories** tab toolbar.

ii. The **Plan Scope Card Cost** window will appear.

iii. Left click the Edit button on the **Plan Scope Card Cost** window toolbar.

iv. Modify the details as necessary.

v. Left-click the **OK** button on the **Plan Scope Card Cost** window toolbar to save the record.

vi. Left-click the **Close** button on the **Plan Scope Card Cost** window toolbar to close the window.

d. <u>Delete an Existing Skill Linked to the Card.</u>

i. While the **Card** window is in edit mode, left-click the cost code that you would like to delete within the grid and left-click the **Delete** button on the **Cost Categories** tab toolbar.

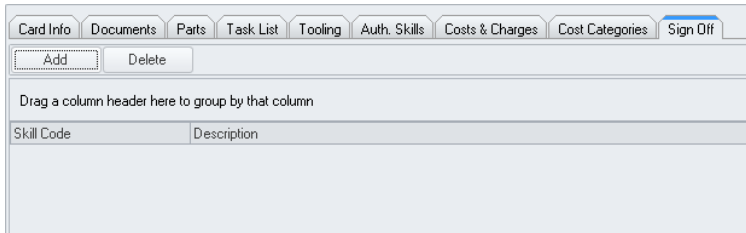ii. A **Confirm** dialog box will appear with the following message:
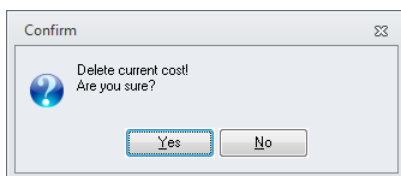
iii. Left-click the **Yes** button.

iv. The cost code will be removed from the grid on the **Cost Categories** window.

END OF SECTION

7. Create Sign Off Requirements

Sign offs are linked to the routine card to reduce the amount of manual sign off entry on the maintenance work order and to ensure uniformity of the documentation for cards that are performed repeatedly.
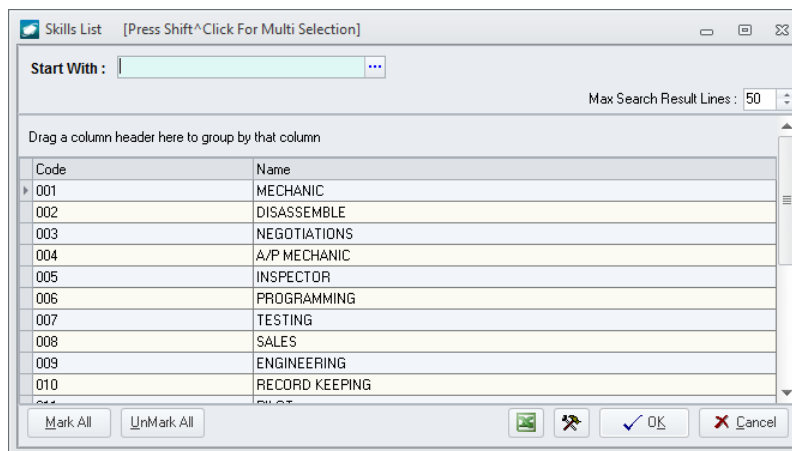
a. From the **Card** window, left click the **Sign Off** tab.

b. <u>Add a Sign Off to the Card.</u>

    i. While the **Card** window is in edit mode, left-click the **Add** button on the **Sign Off** tab toolbar.

    ii. The **Skills List** search window will appear.

    iii. Select the appropriate skill(s) (left-click the line(s) within the search window and left-click OK).

    iv. The sign offs will appear in the grid on the **Sign Off** tab.

c. <u>Delete an Existing Skill Linked to the Card.</u>

    i. While the **Card** window is in edit mode, left-click the sign off that you would like to delete within the grid and left-click the **Delete** button on the **Sign Off** tab toolbar.

    ii. The sign off will be removed from the grid on the **Sign Off** tab.

END OF DOCUMENT