

PLANNING, PRIORITIZATION & HISTORY RECORDS



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TRAINING CENTER



Introduction

Maintenance and operations teams live with two constant pressures: too much work and too little time. The Planning, Prioritization & History Records Course builds the discipline that turns that pressure into control. Participants learn how to plan work properly, prioritise by criticality, schedule resources realistically, and capture history records that improve every future decision. Furthermore, the course covers work order systems, backlog management, and planning KPIs used in reliability practice. In addition, it links planning and records to asset performance and cost reduction. As a result, delegates leave able to run a planning function that reduces downtime and rework.

Planning, Prioritization & History Records Course Objectives

- Apply maintenance planning and scheduling principles within a reliability framework.
- Prioritise work using criticality analysis and risk-based ranking methods.
- Build work order structures with clear job steps, materials, and labour estimates.
- Develop weekly and daily scheduling practices with realistic capacity loading.
- Manage and reduce maintenance backlog using age profile analysis.
- Capture accurate equipment history records and failure coding.
- Apply failure coding taxonomies and standard work order close-out processes.
- Measure planning performance with KPIs such as schedule compliance and wrench time.
- Apply RCM and FMECA concepts to prioritisation decisions.
- Improve spare parts planning and material availability through records data.

Course Methodology

- Interactive workshops led by maintenance planning and reliability practitioners.

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- Case studies of planning improvement in industrial operations.
- Exercises using work order templates, criticality matrices, and backlog reports.
- Group work on scheduling scenarios and capacity loading.
- Analysis of history records and failure coding data sets.
- Role-play of planning meetings and prioritisation discussions.
- Capstone project: presenting a planning and prioritisation improvement plan.

Who Should Take This Course

- Maintenance planners and schedulers.
- Reliability and asset management engineers.
- Maintenance supervisors and team leaders.
- Operations and plant managers.
- CMMS/EAM system administrators and users.
- Shutdown and turnaround planners.

Planning, Prioritization & History Records Course Outlines

Day 1: Foundations of Maintenance Planning

- The maintenance planning and scheduling cycle.
- Reactive, preventive, and predictive work types.
- Roles of planner, scheduler, supervisor, and technician.
- Work identification and notification processes.
- Planning versus scheduling: where each adds value.
- Planning pitfalls and common organisational barriers.





- Exercise: mapping a current planning process.

Day 2: Prioritisation and Criticality Analysis

- Priority systems and how to apply them consistently.
- Criticality analysis and risk-based ranking.
- Consequence and likelihood scoring methods.
- Applying RCM and FMECA concepts to work selection.
- Emergency versus urgent versus routine work.
- Balancing preventive and corrective workloads.
- Workshop: building a criticality matrix for equipment.

Day 3: Work Orders, Job Plans, and Scheduling

- Work order structure: scope, steps, materials, and labour.
- Writing clear job plans and standard work instructions.
- Estimating labour hours and resource requirements.
- Weekly scheduling and capacity loading principles.
- Daily coordination with operations and permits.
- Managing schedule changes and break-in work.
- Exercise: preparing a weekly schedule with capacity checks.

Day 4: History Records, Coding, and Data Quality

- Purpose of equipment history and why records fail.
- Standard work order close-out and feedback capture.
- Failure coding taxonomies and coding discipline.
- Recording labour, materials, and downtime accurately.

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- Data quality controls and audit of records.
- Using history data for reliability analysis and improvement.
- Exercise: coding real work order records correctly.

Day 5: Backlog, KPIs, and Spare Parts Planning

- Backlog measurement and age profile analysis.
- Setting backlog targets and reducing deferred work.
- Planning KPIs: schedule compliance, wrench time, planning ratio.
- Linking planning data to spare parts demand.
- Min-max, reorder points, and critical spares identification.
- Reporting performance to management.
- Capstone project: presenting a planning improvement plan.

Conclusion

By successfully completing Planning, Prioritization & History Records, participants will have acquired practical knowledge of work planning, criticality-based prioritisation, scheduling, backlog control, and history record management. They will understand how accurate records and disciplined planning reduce downtime, rework, and cost. In addition, they will gain skills in planning KPIs and spare parts planning. Gentex Training Center builds this programme around applied maintenance practice, so planners return ready to deliver measurable reliability improvement.

FAQs





Q1 What is the "Planning, Prioritization & History Records" course about?

It covers how to plan and prioritise maintenance and operational work and how to record its history properly. Participants learn criticality analysis, work order design, scheduling, backlog control, and data quality. The course connects disciplined planning to reliability and cost performance.

Q2 What are the key benefits of the "Planning, Prioritization & History Records" course?

It reduces downtime, rework, and emergency work by introducing planning discipline. Participants gain prioritisation and scheduling skills and a clear approach to data quality. Organisations benefit from higher wrench time, better spare parts decisions, and more reliable assets.

Q3 What skills will I gain from the "Planning, Prioritization & History Records" course?

Participants gain maintenance planning and scheduling, criticality and risk-based prioritisation, work order and job plan development, and history record management and data quality control.



Q4 What tools, methods, or standards are covered in the "Planning, Prioritization & History Records" course?

The course covers the planning and scheduling cycle, criticality analysis and risk ranking, RCM and FMECA concepts, work order structures and job plans, weekly scheduling and capacity loading, failure coding taxonomies, backlog age profile analysis, planning KPIs (schedule compliance, wrench time, planning ratio), and spare parts min-max and reorder point methods.

Q5 How is the "Planning, Prioritization & History Records" course applied in real-world practice?

Participants apply it by assessing criticality before assigning priority, writing clear job plans with labour and material estimates, and building weekly schedules within capacity limits. They also close out work orders with accurate failure codes and use backlog and KPI reports to drive improvement.