Servicing Workflow Using M5 System

Overview

This document outlines a recommended best-practice servicing workflow using the M5 System, developed as part of Symtech's **Fleet Intelligence** approach.

It provides a structured method for managing asset servicing, maintenance, and compliance activities while allowing flexibility across different organisational models.

Adaptation for Your Organisation

Organisational structures vary. Role titles and responsibilities referenced here may differ within your organisation.

- Identify equivalent roles within your organisation
- Ensure all responsibilities within the workflow are covered
- Maintain communication between operations, maintenance, and asset users

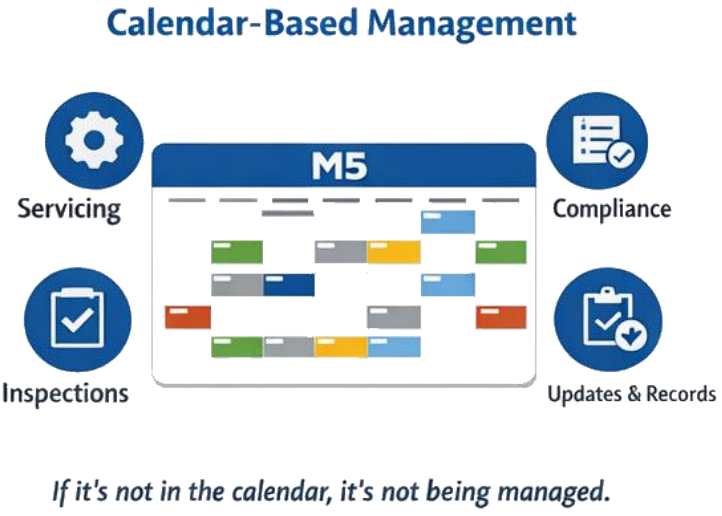
Core Principle - Calendar Based Management

All servicing and maintenance jobs must be actively managed through the M5 calendar.

The calendar provides a single, visual control point for:

- Planning servicing work
- Tracking progress
- Maintaining compliance visibility.

If a job is not correctly scheduled or updated in the calendar, it is not being actively managed.



Servicing Workflow Overview

Jobs within M5 originate from multiple sources and flow into a single management process:

1. **Job Creation**

   Jobs may be generated from:

   - Pre-start inspections (defects identified in the field)
   - Scheduled servicing (time, distance, hours, or usage-based intervals)
   - Automated system triggers (e.g. certification or expiry-based requirements)
   - Workshop-initiated maintenance (repairs or additional findings)
   - External integrations (e.g. fleet or regulatory systems).

2. **Job Planning *(Calendar)***

   - All jobs must be scheduled to a realistic timeframe
   - Work should be aligned with operational availability
   - All planned work must be visible in the calendar.

3. **Job Execution**

   - Work is completed and recorded in M5
   - Compliance and servicing records are updated.

4. **Job Completion**

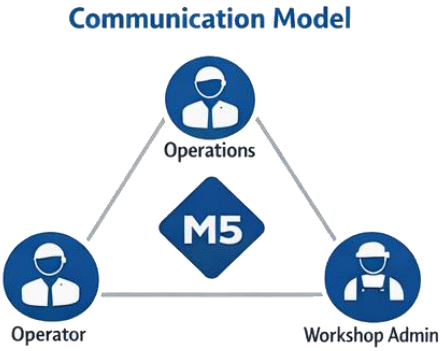
   - Work is reviewed, compliance is validated,
     and the job is formally signed off in M5, records retained.

Communication Model

Effective servicing requires coordination between:

- Asset User/Operator
- Maintenance/Workshop Function
- Operations / Planning Function

Responsibilities may vary between organisations however, all aspects of the workflow must be covered to ensure effective planning, execution, and completion of servicing activities.



Compliance and Visibility

Compliance-related servicing requirements are typically driven by external regulatory bodies and may vary depending on jurisdiction.

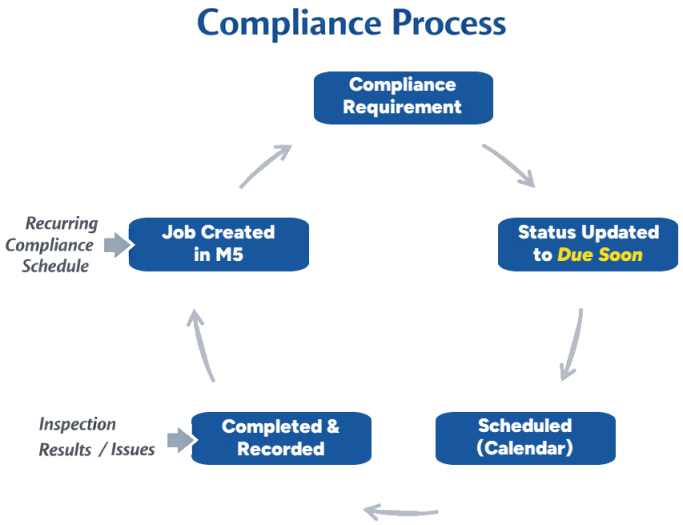
Typical compliance-driven servicing may include:

- Certification and inspection requirements
- Licensing and registration obligations
- Periodic safety checks
- Defects identified during inspections

The M5 system supports the scheduling, tracking, and validation of these obligations within a single workflow.

To maintain control:

- Inspection issues must generate jobs
- Jobs must be scheduled and actioned (triggered by status change)
- Asset status must reflect actual condition



Failure to actively manage jobs can result in reduced visibility, compliance gaps, and increased operational risk.

Summary

FLEET INTELLIGENCE is achieved through consistent and disciplined use of the M5 system.

By ensuring all servicing activities are visible, planned, and actively managed through the calendar, organisations can maintain control of their fleet, improve efficiency, and support compliance outcomes.