1 Introduction

Welcome to the Freight Best Practice ‘Vehicle Maintenance Planner’. This tool is intended to help logistics and transport professionals plan their maintenance operations in order to improve the efficiency and reduce the whole-life vehicle costs of freight operations. It also focuses on how to better manage the performance of your fleet, through a clear process of monitoring and reviewing.

The ‘don’t fix it until it’s broke’ philosophy can lead to high expenditure on large and unexpected maintenance jobs, and can cause unscheduled disruptions to your operation when vehicles are out of action for periods of time.

Legal and safety obligations are also important. The law requires vehicles to be maintained to a minimum standard, with regular vehicle inspections. If vehicles are found not to comply with minimum legal standards by an enforcement agency they can be prohibited from proceeding until satisfactory repairs have been carried out. Where this occurs, the costs of disruption to delivery schedules can be high. This tool enables you to plan and comply with legislation and can help your fleet achieve a higher pass rate for its annual roadworthiness inspections.

For more information on best practice within maintenance click here to go to the Freight Best Practice Preventative Maintenance Guide.

Remember, good maintenance can help improve the safety of your most important resource – your drivers. The DfT Freight Best Practice Programme hopes you will find the Vehicle Maintenance Planner useful in your operation.

2 How To Get Started

Download and load the tool onto your computer system and save it as ‘Vehicle Maintenance Planner’. Please note that this tool caters for up to 50 vehicles, but if you operate more vehicles, you can create copies of the tool by saving it under different names. For example, ‘Vehicle Maintenance Planner – depot 1’, ‘Vehicle Maintenance Planner – depot 2’, etc.

You are required to enter data into some of the worksheets which is then used by the spreadsheet to calculate the maintenance schedule of your fleet. The results are shown on the output pages, for example, your weekly vehicle MOTs are shown on the ‘MOT worksheet’.

The Vehicle Maintenance Planner comprises an Excel spreadsheet workbook, containing a series of worksheets. You are required to enter data into some of the worksheet which is then used by the spreadsheet to calculate the maintenance schedule of your fleet. The results are shown on the output pages, for example, your weekly vehicle MOTs are shown on the ‘MOT worksheet’.
3 Using The Vehicle Maintenance Planner

3.1 Main Menu

On this sheet, you have various options:

- Click on ‘User Guide’ button – directs you to the user guide (this guide)
- Click on ‘Flow Chart’ button – directs you to a flow chart detailing the main functions of the tool
- Click on the ‘Input Details’ button – directs you to the ‘input sheet’ where you can input fleet information
- Click on the ‘Maintenance Notification Sheet’ button – directs you to the ‘maintenance notification sheet’ where you can produce information to send to your maintenance provider
- Click on the ‘Year Planner’ button – directs you to the ‘year planner sheet’ where you can view all planned maintenance for the year
- Click on the ‘MOT Finder’ button – directs you to the ‘MOTs sheet’ where you can view all MOTs that need booking or are due for any week of the year
- Click on the ‘Unplanned Maintenance Log’ button – directs you to the ‘Unplanned Maintenance Log sheet’ where you can keep track of any unplanned maintenance your vehicles require
### 3.2 Input Sheet

Figure 2  Input Sheet

<table>
<thead>
<tr>
<th>Vehicle Reg/Trailer No.</th>
<th>Type</th>
<th>Model</th>
<th>Previous MOT Date</th>
<th>Inspection Frequency (weeks)</th>
<th>Previous Inspection Date</th>
<th>Previous Date of Reduced Pollution Check</th>
<th>Previous Date of Technograph Regulator</th>
</tr>
</thead>
<tbody>
<tr>
<td>HQS438R</td>
<td>Artic</td>
<td>Jans Vecheke</td>
<td>02/07/2007</td>
<td>8</td>
<td>22/03/2008</td>
<td>06/05/2007</td>
<td>27/07/2007</td>
</tr>
<tr>
<td>T6144</td>
<td>Trailer</td>
<td>Jans Vecheke</td>
<td>02/07/2007</td>
<td>8</td>
<td>22/03/2008</td>
<td>06/05/2007</td>
<td>27/07/2007</td>
</tr>
<tr>
<td>L6025</td>
<td>Tractor</td>
<td>Jans Vecheke</td>
<td>30/09/2007</td>
<td>8</td>
<td>22/03/2008</td>
<td>06/05/2007</td>
<td>27/07/2007</td>
</tr>
<tr>
<td>SET6004</td>
<td>Van</td>
<td>Jans Vecheke</td>
<td>02/07/2007</td>
<td>8</td>
<td>06/05/2007</td>
<td>25/07/2007</td>
<td></td>
</tr>
</tbody>
</table>

The input sheet is the main data entry sheet for entering vehicle service and maintenance information. The ‘white’ coloured cells are the cells in which you can enter data. The points below explain the cells and content of this sheet:

- **Depot:** enter depot name
- **Fleet Manager:** enter the fleet manager name or the person responsible for managing and running this tool
- **Date commencing:** You can enter in date format only (dd/mm/yyyy), the date you would like their yearly planner to commence
- **Vehicle Reg / Trailer No:** Enter your vehicle registration numbers or the trailer number
- **Type:** This field is used for specifying the type of vehicle/trailer in your fleet. A drop down list is available so you just have to select the appropriate vehicle/trailer type
- **Model:** Enter the name or model of the vehicle or manufacturer of your trailer. For example, Scania if this is your articulated vehicle, Don Bur, if this is the trailer manufacturer, etc.
- **Previous MOT Date:** Enter in date format your previous MOT date for a particular vehicle/trailer. For example, if a vehicle’s last MOT date was 15/10/2007, then enter 15/10/2007 in this field. The tool will then automatically work out when the next MOT date is and will show this on the ‘Yearly Planner’ output sheet
- **Inspection Frequency (weeks):** Enter ‘how often’ or how frequently vehicle/trailer inspections are carried out per annum. This will depend on the mileage being done by each vehicle / trailer and your agreed inspection frequency detailed on your Operators Licence. For example, if you carry out inspections every 8 weeks, then you simply need to enter 8 in this field
- **Previous Inspection Date:** Simply enter the most recent date that the vehicle/trailer was inspected. For example, if your trailer was last inspected on 02/10/2007, then you will need to enter this date in the field
Previous Date of Reduced Pollution Check (RPC): For vehicles where this is applicable simply enter the last date that your vehicle’s Reduced Pollution Check or Low Emissions Check (LEC) was carried out. In future years the check will be planned to be carried out at the same time as the vehicle MOT. The LEC is only applicable to vehicles that are travelling into the London and allows vehicles which meet the standards for the Low Emissions Zone, but are not eligible for the RPC, to enter the Low Emissions Zone without incurring a charge.

Previous Date of Tachograph Recalibration: Enter the last date your vehicle’s tachograph was recalibrated. This data is to be entered for tachographs for articulated, drawbar and rigid vehicles only. The tool will then show this on the yearly planner represented by a symbol (‘T’ in this instance) on the date recalibration is due (if last recalibration was 2 years earlier).

At the bottom of the sheet notes are provided detailing sources of further information.

If data is entered that indicates a service, MOT or other test is overdue the cell will be highlighted in red to warn you that a service/inspection is urgently required or that you have made a mistake.

There are various ‘buttons’ on the input sheet which perform different functions as follows:

- **Sort by Type**: This button is located at the top of input sheet, just above the ‘type’ column. Once you have entered all your fleet information, you can click on this button so that the information is represented on the input sheet and yearly planner in vehicle type order. For example, all artic type vehicles will be listed together, followed by all drawbar trailers, followed by all rigid vehicles, etc.

- **Maintenance Notification Sheet**: by clicking on this button, you will be directed to the maintenance notification sheet

- **Yearly Planner**: by clicking on this button, you will be directed to the yearly planner

- **MOTs**: by clicking on this button, you will be directed to the MOT sheet where you will see the MOTs of your fleet on a weekly basis

- **Print**: by clicking on this button, the input sheet will be printed on A3 paper. The number of sheets required for print will depend on the number of vehicles/trailers entered on the input table

- **Main Menu**: takes you back to the main menu

### 3.3 Maintenance Notification Sheet

All the information shown on this sheet is worked out automatically based on the information you have entered in the ‘input sheet’. Enter the date you would like to look at in the ‘Week Commencing’ box at the top of the sheet. If you would like to send notifications by email to your maintenance provider / workshop fill in their email address at the top of the sheet. The following information is carried forward from the input sheet so that you do not have to re-enter the information:

- **Depot**
- **Fleet manager**
- **Vehicle Reg / Trailer No**
Type

**Reason for Service:** This is worked out automatically based on the information entered in the input sheet. The key is provided at the bottom of the sheet.

**Other Comments:** In this box you can write any comments for your workshop / maintenance provided - for example any unplanned maintenance required for a vehicle, if a particular service suggested is not required or any parts that need checking / repairing e.g. ancillary equipment.

**Date Required:** You can indicate which days you want the work to be carried out by placing an appropriate symbol in the relevant column.

**All Booked - Yes / No:** This is for your maintenance provider to fill in and send to you and indicates whether your requested maintenance can be carried out.

**If No: Reason:** this provides space for the maintenance provider to indicate why any requests can not be carried out.

Space is provided for you to add any additional symbols to the ammendable key box to save space within the comments section.

There are various ‘buttons’ on the service information sheet which perform different functions as follows:

**Yearly Planner:** by clicking on this button, you will be directed to the yearly planner.

**MOTs:** by clicking on this button, you will be directed to the MOT sheet where you can see the MOTs of your fleet on a weekly basis.

**Input Sheet:** clicking on this button will direct you to the ‘input sheet’

**Email:** by clicking on this button, an email will be created for you to send to your maintenance provider. You may edit the spreadsheet created and the email text before you send as required. Any vehicles not requiring any work will be automatically removed from the table.

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**Figure 3  Maintenance Notification Sheet**
3.4 Yearly Planner

Once you have input all the required information into the input sheet, the yearly planner is automatically updated to provide a summary of the planned maintenance, for an entire year. Each piece of maintenance is displayed via a symbol on a weekly basis as follows:

- S = Service
- T = Tachograph Recalibration
- I = Inspection
- M = MOT
- R = Reduced Pollution Check / Low Emissions Certificate (LEC)

The Yearly Maintenance Planner will enable you to visually track and identify the status of your entire fleet. It helps to detail if Services, Inspections, Tachograph Calibrations MOTs, and any other important aspects are all up to date and when the next ones are due. It also provides you with a brief overview of the fleet registrations and type/make of vehicle (i.e. rigid/articulated or Scania, Mercedes, Volvo, etc) at a glance. This will help you to stay compliant.
The maintenance planner has been designed to be ‘wall-mounted’ within offices and can be printed on A3 size paper (or larger) to allow improved visibility. The tool has been designed to automatically print on A3 paper. **Please note:** You need to check your printer to see if it can print on A3 or larger sized paper.

Print settings can be adjusted within the print preview screen by clicking on Setup.

On the yearly planner, you will notice a ‘planned’ and ‘actual’ row per vehicle or trailer. The ‘Planned’ row refers to the information you have put into the input sheet, so the tool automatically inserts the right maintenance code into the relevant week. For example ‘M’ for an MOT, ‘I’ for Inspection etc. For further information on the codes displayed on the yearly planner, please refer to the ‘key’ box at the bottom of the yearly planner table.

The ‘actual’ rows are to be manually filled in by yourself. Once you’ve inputted all the required information in the input sheet, print the yearly planner on A3 paper (see print instructions above). Once this is done, you can wall mount the printouts and fill in the ‘actual’ rows either manually or electronically showing when or whether you carried out the task as planned. For example, if the planner showed ‘M’ (MOT) in a certain week and you did carry out an ‘M’ in that week then put ‘M’ in the ‘actual’ box. If you carried out the ‘M’ in the week before the planned ‘M’ then put the symbol ‘M’ in the ‘actual’ cell in the week the ‘M’ was carried out.

**Note:** Services are planned to occur every second inspection, this is a practice used by many operators. If this is not suitable for your operation plan your inspections separately using the actual date box. There is also a box detailing them at the bottom of the sheet.

Space has been provided in an ‘amendable key’ for you to add any symbols for any additional maintenance specific to your operation.

There are various ‘buttons’ on the yearly planner sheet which perform different functions as follows:

- **Input sheet:** by clicking this button, you will be directed to the ‘input sheet’
- **Maintenance notification sheet:** by clicking on this button, you will be directed to the maintenance notification sheet
- **MOTs:** by clicking on this button, you will be directed to the MOT sheet where you can see the MOTs of their fleet on a weekly basis
- **Print:** by clicking on this button, you will be reminded to print on A3 paper. Once you click the ‘ok’ button, the planner will appear on the screen in ‘print preview’ format. You can then select the relevant printer to print on A3 paper, then click print. The number of A3 sheets required for print will depend on the number of vehicles/trailers
- **Main Menu:** takes you back to the main menu

### 3.5 MOTs

This sheet is intended to give you a breakdown of your fleet MOTs (and MOTs due for booking) on a weekly basis depending on the week you choose from the drop down list provided. For example, if you want to view all MOTs in the week commencing 20 April 2008, then select this date from the drop down list and click on the grey ‘Find MOTs’ button. This will automatically generate all the MOTs due for this particular week, all MOTs that are due in 6 weeks time and require booking and all MOTs that are due in 8 weeks time and
require booking. If there are no MOTs in a particular week, then the MOT table will be blank and a message box will be displayed stating “No vehicles require an MOT or a booking this week.”

There are various ‘buttons’ on the MOT sheet which perform different functions as follows:

- **Input sheet**: by clicking this button, you will be directed to the ‘input sheet’
- **Yearly Planner**: by clicking on this button, you will be directed to the yearly planner
- **Print**: by clicking on this button, the input sheet will be printed on A3 paper. The number of A3 sheets required for print will depend on the number of vehicles/trailers entered on the input table
- **Main Menu**: takes you back to the main menu

Figure 5 MOTs Screen

### MOTs

<table>
<thead>
<tr>
<th>MOTs to be Carried Out this Week</th>
<th>MOTs Due for Booking 8 weeks</th>
<th>MOTs Due for Booking 6 weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 XXX</td>
<td></td>
<td>UUU</td>
</tr>
<tr>
<td>2 TTT</td>
<td>15/08/2008</td>
<td>01/08/2008</td>
</tr>
<tr>
<td>4 NNN</td>
<td>16/08/2008</td>
<td></td>
</tr>
<tr>
<td>5 SSS</td>
<td>15/08/2008</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 TTT</td>
<td>25/08/2008</td>
<td></td>
</tr>
</tbody>
</table>

#### 3.6 Unplanned Maintenance Log

Figure 6 Unplanned Maintenance Log Screen

Any unplanned maintenance can be logged in the Unplanned Maintenance Log. Simply select the vehicle or trailer using the drop down menu and type in details of the maintenance that has been carried out in the relevant boxes.
Two buttons are provided at the top of the sheet to allow you to analyse your unplanned maintenance.

- **Sort by Date**: clicking this button sorts all the entries with the most recent unplanned maintenance at the top
- **Sort by Registration**: clicking this button sorts all the entries by registration number, allowing you to identify which vehicles have been in for unplanned maintenance most frequently

To return to the Main Menu click on the button at the top right of the sheet. Remember to take into account the effect any unplanned maintenance may have on your yearly planner - for example you may wish to bring a service forward or you may need to recalibrate your tachograph when the vehicle is in for the unplanned repairs. Log these changes in the Actual row of your planner.

If you have any comments or would like to get in touch with Freight Best Practice, please see contact details below:

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