



5.0 User Guide

WEB Preventive Maintenance Manager



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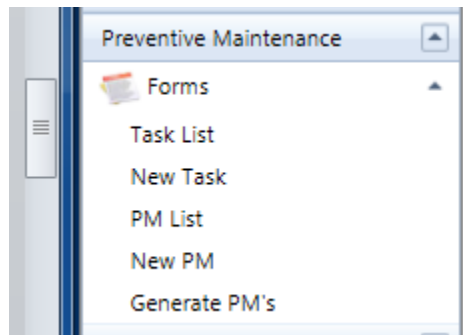
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Preventive Maintenance

Things to consider when Implementing PM

- What do I want to PM?
 - HVAC Equipment
 - Vehicles
 - Lawn Equipment
 - Roofs
- Do I want to set up PM's for Inspections?
 - Vehicle tags
 - Exterior building inspections
 - Playground Equipment
 - Exterior Door Locks
 - Security & Fire Alarm Systems
- What type of schedules do I want to create?
 - Intervals (i.e. Every 6 months)
 - Specific Weeks (i.e. Weeks 5, 17, 29, etc.)



Task List

The **task list** option provides a list of all tasks available for scheduling. Selecting the **Task ID** allows the user to open the task in a separate window.

Asset Groups

Asset Group

Asset Sub Group

Filter by Expressions

Field

Expression

Text

PM ID	Group	Sub Group	Task List	Description
5101	RDS	510	Check for general safe conditions Look for any protrusions tighten any loose connections.	Roads and Grounds
2000	HVAC	200	FILTERS _____ FANS _____	AIR HANDLING UNITS
6150	PLUM	615	check for proper operation of faucets, toilets, water heaters check shower operation check water t...	Fixtures
6110	WT	WELL	Check for proper operation Check booster pump Air compressor check pressure tank grease booster ...	CHECK PUMPS
2100	SAFE	210	ANY SPECIFIC INSPECTIONS THAT ARE APPLICABLE TO THE BUILDING _____	ASBESTOS
2200	HVAC	220	COUPLINGS ALIGNMENT LUBRICATION SAFETY GUARD	CHILLED WATER CIRCULATOR PUMPS

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- **Asset Group-** Select from the drop down list to display only a specific asset group.
- **Asset sub Group-** Select from the drop down list to display only a specific asset sub group.
- **Field-** Used in conjunction with the **Expression** and **Text** fields. Select from the list to filter the list of tasks by **Task List**, **Task Description** or **Task ID**.
- **Expression-** Used in conjunction with the **Field** and **Text** fields. Select from the list to filter the by the **Field** selected by the task it **Starts With**, **Equals**, **Ends With** and **Contains**.
- **Text-** Used in conjunction with the **Field** and **Expression** fields. Select Enter text to filter the list. The list will be field based on the **Field** and **Expression** selected.
- **New Task Setup Button-** Opens the Task Setup form to create a new task.

New Task

The **New Task** form is for creating a list of task to be accomplished as part of a PM Work Order. These items identify what work needs to be accomplished in order for the PM work to be marked as complete.

The screenshot shows a web form titled "New Task". At the top, there are three buttons: "Reset", "Save", and "Save / New". Below the buttons are five input fields, each with a label to its left: "PM Task ID", "Description", "Asset Group", "Asset Sub Group", and "Task Description". The "PM Task ID" and "Description" fields are highlighted in yellow. The "Asset Group" and "Asset Sub Group" fields are dropdown menus. The "Task Description" field is a large text area.

- **PM Task ID** – (required) when creating a PM Task ID, treat it like a code or shortcut for the description.
- **Description** – (required) a description identifies, in length, the PM task
- **Asset Group** – (required) defines which Asset group this PM will be used for. You can have multiple PM tasks for the same Asset Group.
- **Asset Sub Group** – A subcategory of the Asset Group (example: a Sub Group of HVAC is Air Handler; a Sub Group of HVAC is Boiler, etc.)
- **Task Description** – identifies what task needs to be completed in order for the PM to be complete. The PM Task Description will also print when the PM Work Order is generated. An underscore can be entered before each task, allowing the technician to physically check each task as it is completed
- **Reset Button**- Resets the form to the original values
- **Save**- Saves the information on this form.
- **Save/New**- Saves the information on this form and goes to a blank form for creation of a new task.

PM List

This form allows the user to see a complete list of PM Schedules and apply various filters to locate specific information.

PM Sched	Location	Type	Asset	Area	Last Ran	Last WO#	Next Run
1	Bethesda	Asset	725				
2	Hillside	Asset	784				

- **Location Tree** – The Field in the top left of this form is a tree of locations. Expand the parent location to see a list of children. When a parent is selected PMs for that location and all the children are included in the results.
- **Asset Group**- Select from the drop down list to display only a specific asset group.
- **Asset sub Group**- Select from the drop down list to display only a specific asset sub group.
- **Field**- Used in conjunction with the Expression and Text fields. Select from the list to filter the list of tasks by Task List, Task Description or Task ID.
- **Expression**- Used in conjunction with the Field and Text fields. Select from the list to filter the by the Field selected by the task it Starts With, Equals, Ends With and Contains.
- **Text**- Used in conjunction with the Field and Expression fields. Select Enter text to filter the list. The list will be field based on the Field and Expression selected.

New PM

This form allows the user to create a PM Schedule for a specific Location and Asset Group or for a specific asset. Once the schedule is created the Tasks created earlier can be assigned and rules reoccurrence created.

Schedule Type Asset Asset Tag # ID-1547 PM Schedule # 3

Location 100 Durham Public Schools, Fuller Building

Asset Group AUDV Asset Sub Group CAMAV Sub Group 2

New Scheduled Task for PM

Details	Location	Type	A	Area	Last Ran	WorkOrderID	Next Run
3AHU	Fuller Building	Asset	1				
3GWBoiler	Fuller Building	Asset	1				

- **Schedule Type** – there are 3 different schedule types
 - **Asset** – this schedule will create a single work order for *each* asset. When you create an Asset Schedule, you **MUST** tie it to an Asset Tag Number. For Asset Schedules, the PM history will be recorded as PM's are generated for each specific asset. *Selecting the location first will filter out all assets assigned to that location.*
 - **Master** – this schedule will create a single work order for all like Asset Groups or SubGroups for the selected location. (i.e. "I want to create 1 single work order for **all** Air Handlers at the High School"). You will not tie this schedule to an asset
 - **Non-Asset** – this type of schedule is mostly used for non-specific equipment. Non-asset schedules can be used mainly for inspections such as Building, Playground equipment, fire alarm systems, etc. You only need to identify a location for this type of schedule.
- **Asset Tag #** - Only needed when an Asset schedule is selected. This list is filtered based on the location selected

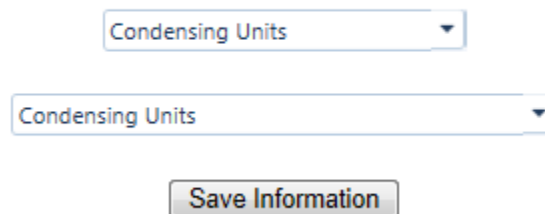
- **PM Schedule #** - System assigned value to identify each specific schedule.
- **Location** – Select the location for this PM schedule. If Asset Schedule Type is selected, you must select an Asset Tag Number from this location
- **Asset Group** – If your current schedule is a Master, then make a selection from this dropdown list. This will filter out those PM Tasks for this Asset Group.
- **Asset Sub Group** – To further categorize your Asset Group PM Schedule, make a selection from this drop-down menu. Again, this filters out your PM Tasks for this Sub Group.
- **Asset SubGroup2** - To further categorize your Asset Sub Group PM Schedule, make a selection from this drop-down menu.
- **Reset Button**- Resets the form to the original values
- **Save**- Saves the information on this form.
- **Save/New**- Saves the information on this form and goes to a blank form for creation of a new task.

Once your selections are made from the top section of this form you must save the schedule. The system assigns this schedule a **PM Schedule #** automatically and you can now assign Tasks for this PM Schedule using the “**New Scheduled Task for PM**” button.

New Scheduled Task for PM

Selecting this button allows you to add a task to be scheduled for this specific PM Schedule and assign the rules for reoccurrence.

You must assign a task before scheduling.



The form contains two dropdown menus. The top dropdown menu is labeled 'Condensing Units' and has a downward arrow. The bottom dropdown menu is also labeled 'Condensing Units' and has a downward arrow. Below these two dropdowns is a button with the text 'Save Information'.

You are first presented with the above form. Select Task ID from the top combo box or Task Description from the lower combo box.

Selecting “**Save Information**” button will open the “**Setting PM Schedules**” form.

Setting PM Schedules

Schedule	Material List	Information	Generation Stats
----------	---------------	-------------	------------------

Your selection will update automatically. You can only select one schedule to run.

Start Date End Date

☐ Hourly
☒ Daily
☐ Weekly
☐ Monthly
☐ Yearly

☒ Every day(s)
☐ Every weekday

☒ No end date ☐ End after occurrences ☐ End by

DTSTART:20120905T000000Z DTEND:20120928T000000Z RRULE:FREQ=DAILY;INTERVAL=1;
BYDAY=MO,TU,WE,TH,FR,SA,SU

Occurs daily starting on 05/09/2012 at 5:30 AM

- **Start Date-** Indicates the date to generate this PM Work Order for the first time.
- **End Date-** Indicates the date to stop generating this PM Work Order. You may leave this field blank.
- **No end date-** Select this feature if you would like this PM Work Order to generate an infinite amount of times at each specified interval.
- **End after-** Select the number of times you would like this PM Work Order to generate at each specified interval.
- **End by-** Select a date you would like to stop generating this PM Work Order. The PM will generate the specified interval until that date is reached.

Material Lists

The Material List identifies what materials will be needed to complete this specific PM Schedule. You can identify materials that will need to be purchases or will be used from the warehouse inventory. There is no limit to the number of material list records. The material list also shows up on the printed, hard copy work order that is generated.

CurrentID	Type	Stock#	Description	Quantity	
1	Mechanical	000012	OPEN	1	Delete Edit

Select the **“Add new record”** button to insert a blank material item.

Type- Enter the Type of Inventory to be added.

Stock #- Enter the stock number of the item needed for the PM.

Quantity- Enter the amount of this item needed to complete the PM.

INFORMATION

The information page contains general information about this PM Work Order.

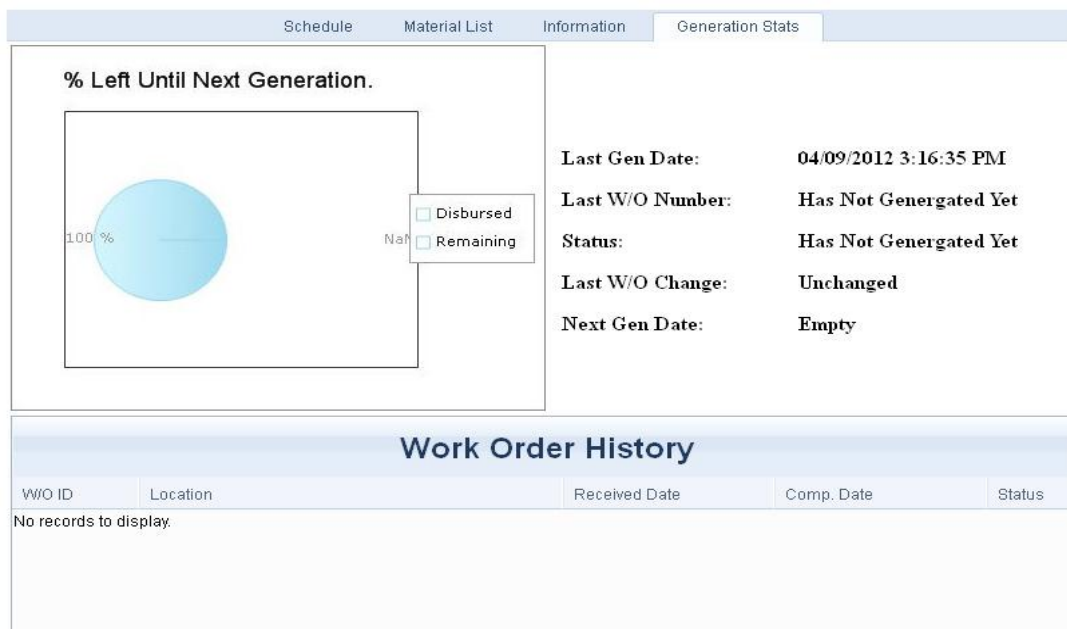
Schedule		Material List		Information		Generation Stats	
<input type="button" value="Reset"/>		<input type="button" value="Save"/>					
Description	<input type="text"/>					Last WO #	
Location	Durham Public Schools, FULLER BLDG					Last Date	
Group	ALARMS	Asset Tag #	100102001		Last Unit		
SubGroup	ALARMS	Asset Name	KIEQ Ice Machine		PM Type	0010	
SubGroup2					PM ID	808716229	
Project ID	<input type="text"/>	Trade Code	<input type="text"/>	Notes			
Priority ID	<input type="text"/>	Purpose Code	<input type="text"/>	<input type="text"/>			
Budget Code	<input type="text"/>	Assigned To	<input type="text"/>				
Est. Cost	<input type="text"/>	Est. Hours	<input type="text"/>				

- **Description** – this is a system generated field that populates when a PM Task ID is selected
- **Location**- The location this PM will be performed
- **Asset Group** – The Asset Group of this PM
- **Asset Sub Group** – The Asset Sub Group of this PM
- **Asset Sub Group2** - The Asset Sub Group2 of this PM
- **Asset Tag #**- This is the Tag Number of the Asset for this PM. This will only be populated for PM Types of Asset.
- **Asset Name**- This is the Tag Name of the Asset for this PM. This will only be populated for PM Types of Asset.
- **Last WO#**- The last Work Order generated by this PM Schedule.
- **Last Date**- The last date this PM Work Order was generated for this PM Schedule.
- **Last Unit**- If entered; this is the last measured unit for a specific asset for this PM. This information is manually entered.
- **Project ID** – this ties the PM to the selected project. A standard Project ID is 'PM'. This field is carried over from the prior form. The Project ID selected here is placed as the Project ID on the work order it generates
- **Priority ID** – You can assign this PM schedule any work order priority. If this schedule MUST be completed in order to fulfill a city code or requirement, then you may want to assign this a High' priority

- **Budget Code** – you can link this PM Schedule to any Budget Code
- **Est. Cost** – in this optional field, you can place the estimated cost of parts and labor for this PM Schedule.
- **Trade Code** – assign this PM Schedule a trade code, which carries over to the work order
- **Purpose Code** – assign this PM Schedule a Purpose Code or reason.
- **Assigned To** – you can assign this PM Schedule to an individual
- **Est. Hours** – the amount of time you estimate it will take the technician to complete the PM Task List for this schedule. NOTE: *This field becomes valuable in the PM Schedule Forecast Report. The report identifies upcoming PM Schedules to be generated and shows Total Estimated Hours. This will show you the estimated total man hours needed to complete the PM's to be generated.*
- **Notes** – Any additional notes regarding this PM

GENERATION STATS

This tab provides information about the generation of this specific PM Schedule.



- **Last Gen Date** – The last date this PM Schedule was generated
- **Last W/O Number**- The number of the last work order generated for this specific PM Schedule.
- **Status**

Assigning PM Tasks to a PM Schedule-

Schedule Type:
 Asset Tag #:
 PM Schedule #:

Location:

Asset Group:
 Asset Sub Group:
 Sub Group 2:

You need to save the PM before you can add Inspections.

You must assign a task before scheduling.

- PM Task ID** – select from this drop-down menu to assign a PM Task for the location/asset identified in the upper section of this form.

Schedule
Material List
Information
Generation Stats

Your selection will update automaticly. You can only select one schedule to run.

Outlook Scheduler
Interval Scheduler
Specific Weeks

1
5

Remove
Refresh

Please select a week number:
some years do not have 52 weeks
[5] [29-Jan-2012] Add

Save Schedule

Schedule
Material List
Information
Generation Stats

Your selection will update automatically. You can only select one schedule to run.

Outlook Scheduler
Interval Scheduler
Specific Weeks

1

Mile(s)

OR

2

Mile(s)

Save Schedule

Generate PM's

Home

Work Orders

Assets

Employees

Vendors

Utilities

Preventive Maintenance

Forms

Task List

New Task

PM List

New PM

Generate PM's

Inventory

Event Schedule

Quick App

Exec Reporting

Work Order Routing

Locations

Remote Request

TeamWORKS Virtual

TeamWORKS

Generate Preventive Maintenance Work Orders

Select Below to generate for specific areas or leave blank for all:

Priority

EMERGENCY

Asset Group

Asset SubGroup

Department ID

Department Name

Trade Code

Employee ID

Employee Name

Location ID

Location Name

Clear Selections

OK

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