5.0 User Guide

C/S Preventive Maintenance Manager

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Table of Contents

PM Task List Set Up 3
PM Scheduling 4
Assigning PM Tasks to a PM Schedule 5
Setting PM Schedules 5
Material Lists 7
Scheduling Frequency 7
Manually Generating PMs 8
Generate PM Work Orders 10
PM Configuration Options 14
Automatically Generating PMs 15
PM Scheduling Wizard 16
Reports 24
General Task List Report 24
Detailed Task List Report 25
General PM Schedule Report 26
Reprint PM Work Orders 27
PM Forecast Report 28
PM WO Summary 29
PM Work Order Report 30

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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.)

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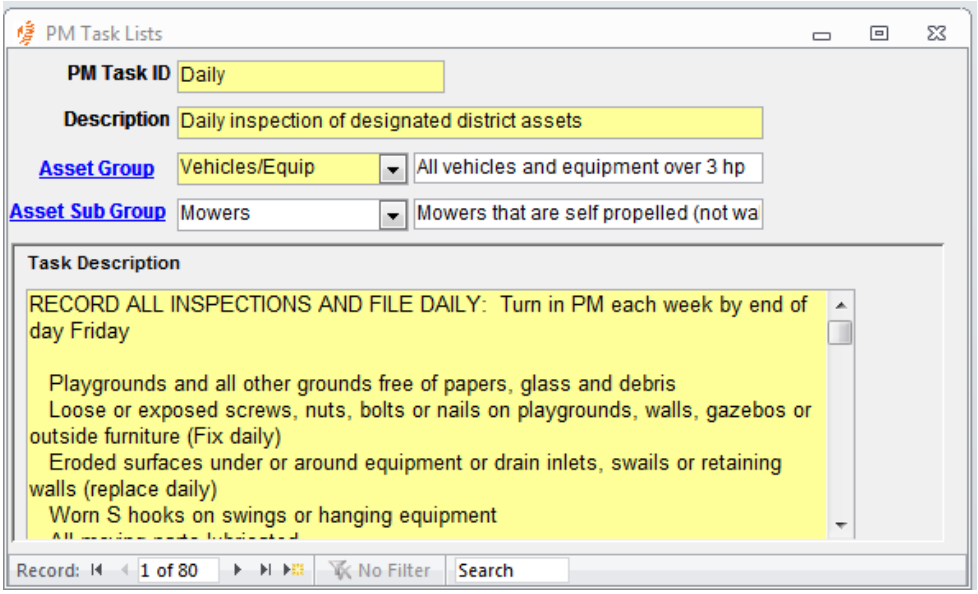
PM Task List Set Up

Task Lists identify what work needs to be accomplished in order for the PM work to be marked as complete.



- **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 SubGroup** – A subcategory of the Asset Group (example: a SubGroup of HVAC is Air Handler; a SubGroup of HVAC is Boiler, etc.)
- **Task Description** – identifies what tasked need 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

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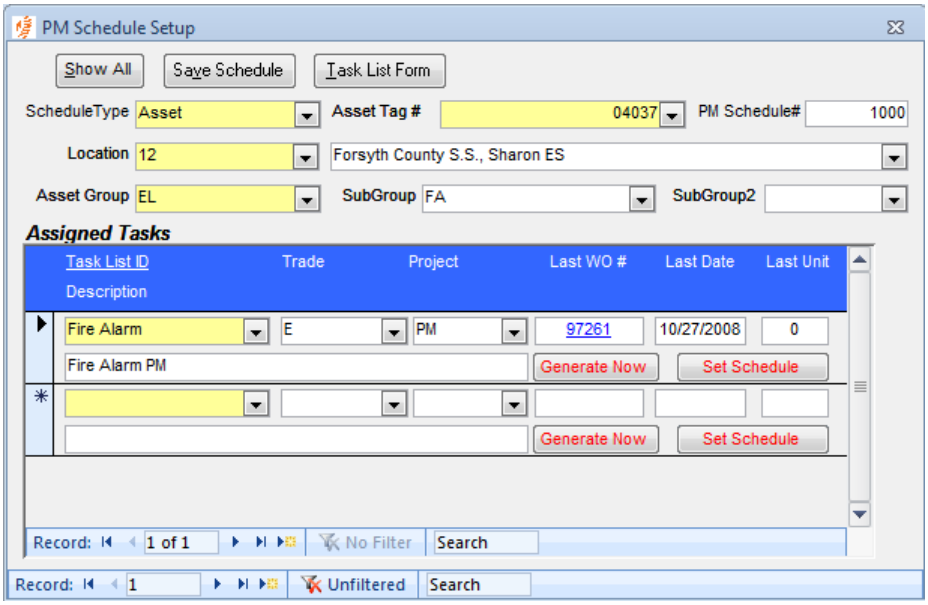
PM Scheduling



Show All - The 'Show All' button removes the filter and gives you the entire record set for PM Schedules.

Save Schedule – will save the PM Schedule once all required fields have been entered. *You must Save the schedule prior to assigning a Task List in the subform*

Task List Form – this is a shortcut to the Task List Form if you need to refer back to or modify a task list

- **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
- **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 SubGroup** – 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 SubGroup.

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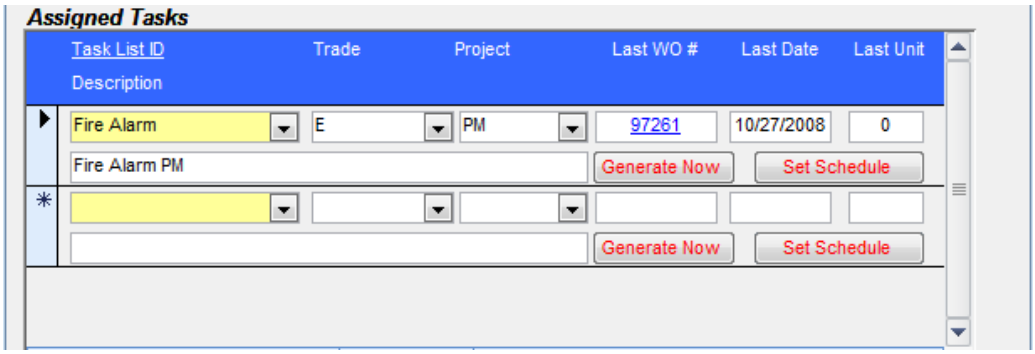
- **Asset SubGroup2** - To further categorize your Asset SubGroup PM Schedule, make a selection from this drop-down menu.

Once your selections are made from the top section of this form, the system assigns this schedule a PM Schedule ID automatically and you can now assign your PM Tasks for this PM Schedule in the assigned Tasks Sub Form.

Assigning PM Tasks to a PM Schedule



- **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. If you selected an Asset Group or SubGroup, this menu will be filtered out.

  Note: you can go to the PM Task List Form by double-clicking the words 'Task List ID in the blue heading of this form. You MUST create the PM Tasks in the PM Task List Form FIRST.

- **Trade –** select the trade that will complete this PM task for you
- **Project –** select the project you would like to tie this PM to. Typically it will be a PM Project
- **Last WO # -** this is a system generated field that indicates the last work order number assigned when this PM last generated. If this is a new schedule, it will default to '0'.
- **Last Date –** this is a system generated field that indicated the last date this PM generated a work order. If this is a new schedule, the default will be 1/1 1990.
- **Last Unit –** this field automatically updates if the PM Schedule is for a vehicle PM based on mileage or another piece of equipment based on hours used.
- **Description –** this is a system generated field that populates when a PM Task ID is selected
- **Generate Now –** if, for whatever reason, you want to 'override' or 'force' a schedule to generate NOW, click this button.
- **Set Schedule –** here, you will determine your scheduling frequency and assign this PM Schedule any other optional codes. You can also create a Material List for this PM Schedule.

Setting PM Schedules

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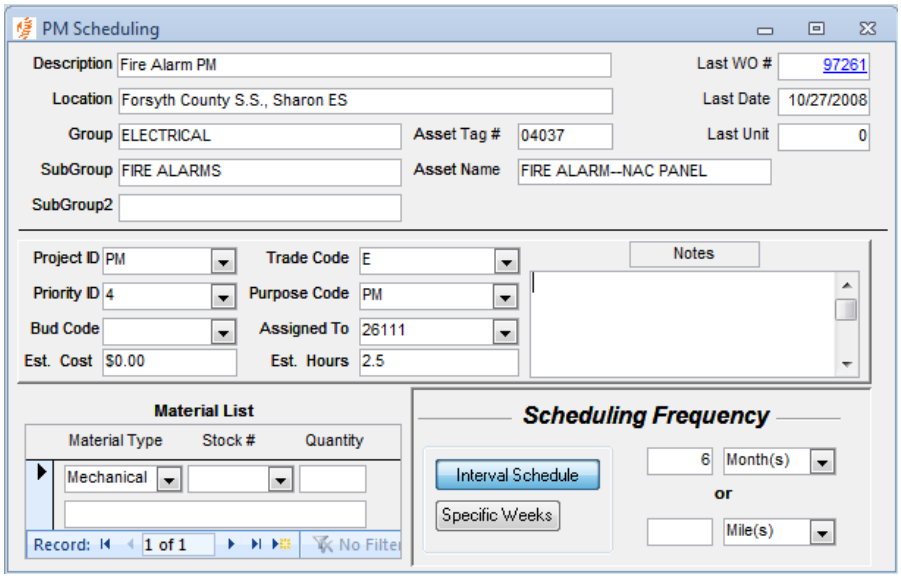

NOTE: The upper section of this form is based on the prior screen, so you will not need to fill in any information on it.

- **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

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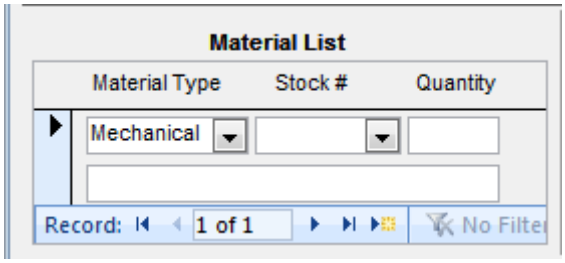
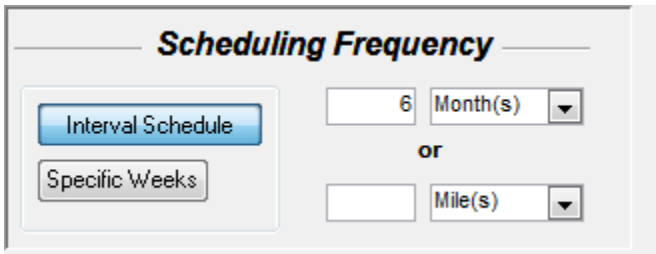
Material Lists

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.



Scheduling Frequency

There are 2 different ways to schedule Preventive Maintenance.



- **Interval Schedule** – with an interval schedule, you can schedule PM's based on any given time interval, hours of usage or distance.
  - **Hours**
  - **Days**
  - **Months**
  - **Weeks**
  - **Years**
  - **Miles**
  - **Kilometers**
- **Specific Weeks** - with a specific weeks schedule, you can set PM schedules to generate during specific weeks of the year. For instance, if I want to schedule this PM to generate while the classrooms are empty, then I can schedule it for that week. Specific week schedules will generate on the first Monday of that week.

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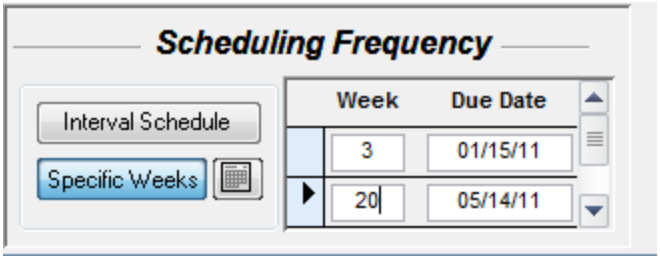
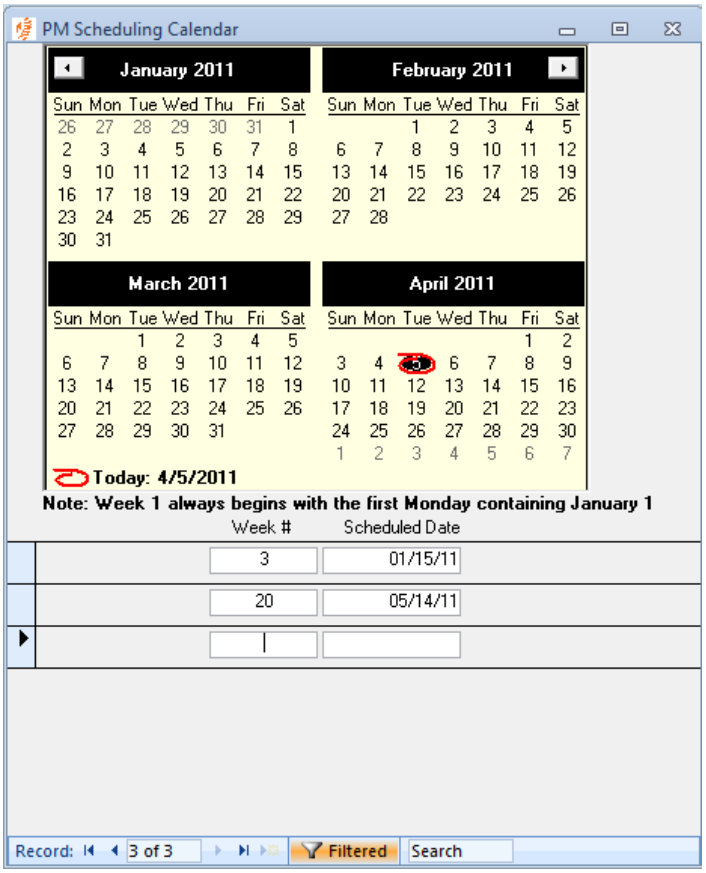


By clicking the calendar button, you can look at a calendar view of the week numbers. Just click on the week you want this schedule to generate. These schedules will generate the FIRST MONDAY of that week.



Manually Generating PMs

If you want, you can select to manually generate PM's. Again, if you selected "Generate PM Work Orders Automatically" in PM Configuration, you should not need to do this. If you want to generate specific PM's based on any certain criteria, then select those options from the drop-down menus. You may select more than one option.

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NOTE: The settings for this manual PM Generation form are local to this machine and are NOT a global setting. For example, if I am an HVAC foreman and wish only to generate PM's for the HVAC trade, then I would select 'HVAC' from the trade code drop-down list then click the 'OK' button. This setting will stay local to this machine. On a different client workstation, I can select other options that will be applied locally to ***that*** *machine.*

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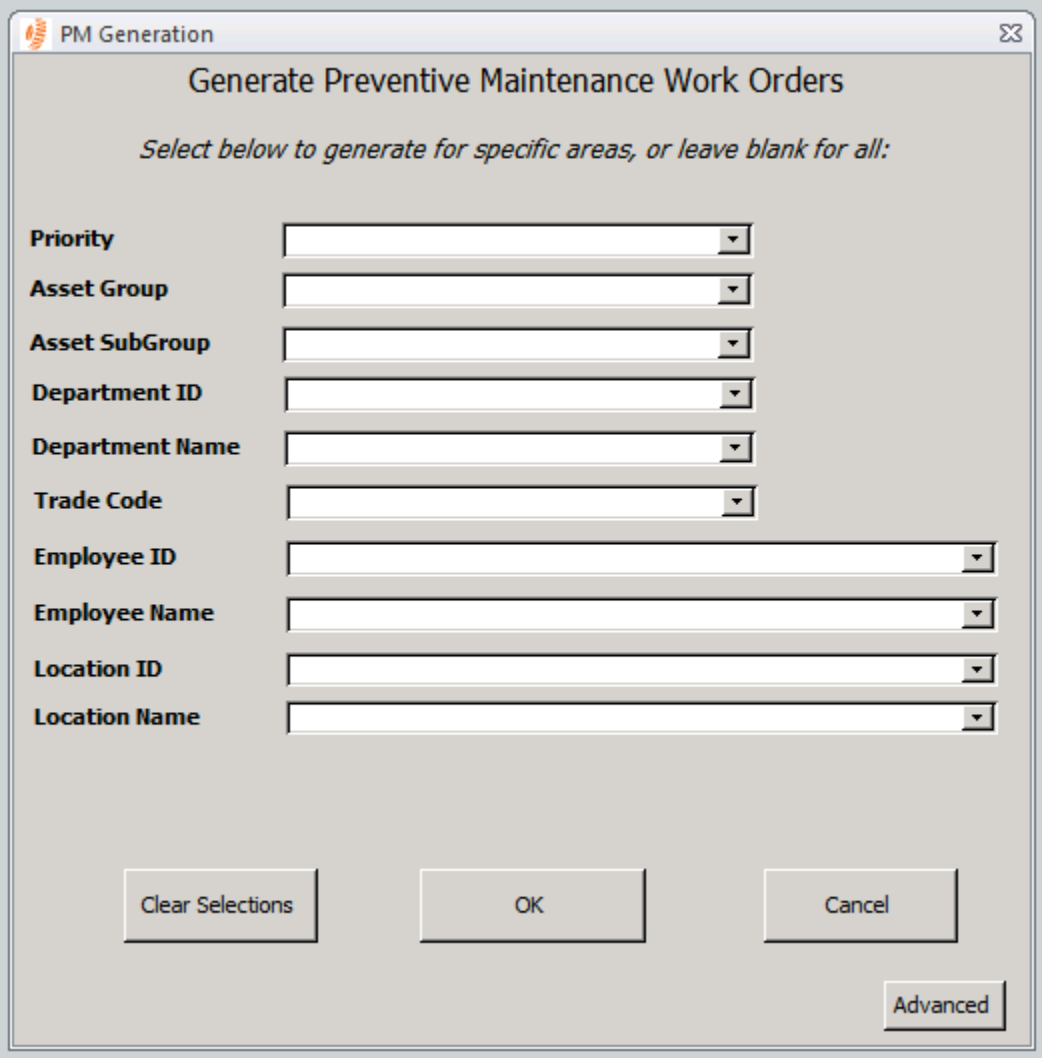
Generate PM Work Orders



Priority – indicates the priority for the work to be done.

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 SubGroup – 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 SubGroup.

Department ID - indicates the department ID this work order is assigned to. When a department is selected, the Employees assigned to that department in the Employee Main Form are filtered out. If the department is left blank, then ALL employees show.

Department Name - indicates the department name this work order is assigned to. When a department is selected, the Employees assigned to that department in the Employee Main Form are filtered out. If the department is left blank, then ALL employees show.

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Trade Code- indicates the trade required to complete the work order. If the work request will take multiple trades, it is suggested that you create a separate work order(s).

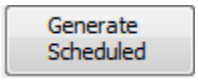
Employee ID - indicates the employee ID of the tradesman assigned to do this work. Selecting the

Employee ID will auto-fill the Employee Name and vice versa.

Employee Name - indicates the Name of the tradesman assigned to do this work.

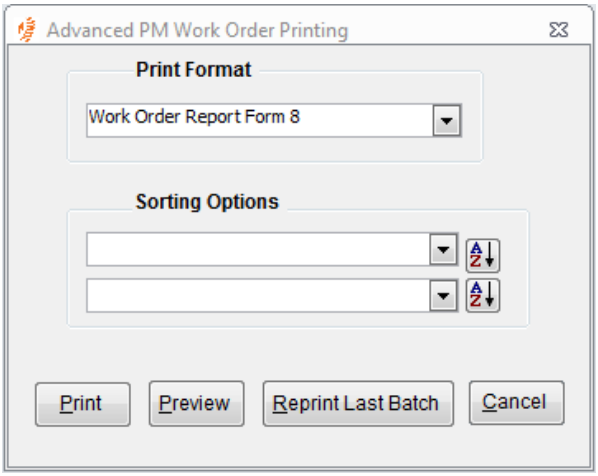
Location ID - the code or shortcut for the location needing the work to be done

Location Name- the full name of the location needing the work to be done.



- creates the PM work orders that are scheduled for generation.

Advanced PM Work Order Printing - Select the printed PM form you wish to use. Your default form will be selected in the drop down list. You can then define the sort order of your printed forms. You may want to sort by employee if the PMs have been assigned to an individual or by department, trade, etc. depending on your method of distribution.



Print- Print the PM Work Orders generated.

Preview- Preview the PM Work Orders generated prior to printing.

Reprint Last Batch- This selection allows you to print the previously generated batch of PM Work Orders. This will be useful if a print job failed or network failure caused the previous print failed for any reason.

Cancel- This will cancel the print job.

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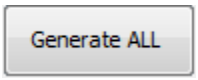
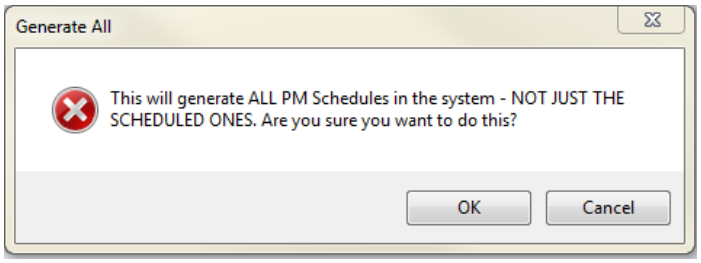
- Clears the filter criteria you have selected

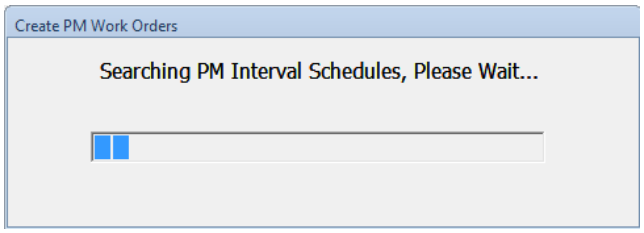
- Cancels the generation

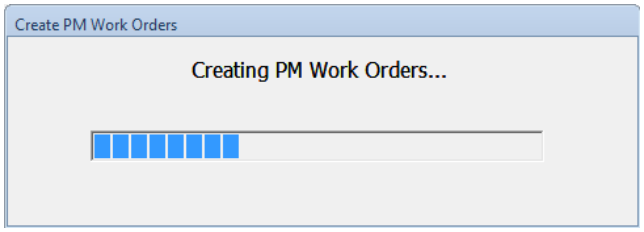


- Generates all PMs in the system



When PM's are generating, you will see some of the following screens.





If a PM has been force generated prior to the next scheduled generation date, you will receive the following message. You can hit Yes and the system will re-generate the new PM. Select Yes to All and it will generate ALL scheduled regardless of whether they have been forced generated. If you select No, the PM will not generate. If you select No to all none of the forced generated schedules will generate.

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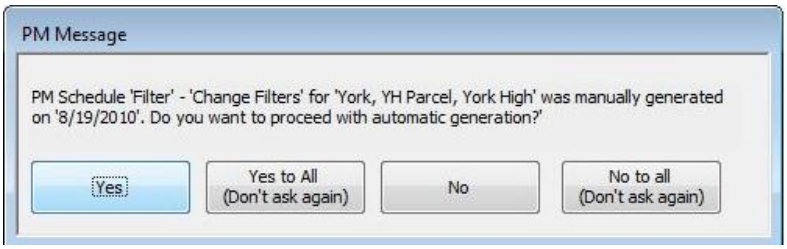

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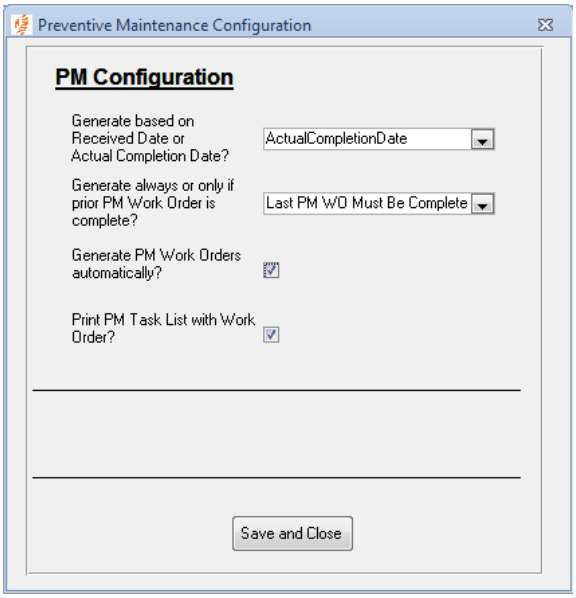
PM Configuration Options



- **Generate based on Received Date or Actual Completion Date** – this option allows you to determine whether **interval** PM's will be generating from the date the prior PM was generated (Received Date) or the date the PM work order was marked as Complete (Actual Completion Date)
- **Generate always or only if prior PM Work Order is Complete** – if you select '**Always'** for this option, the future PM's will generate regardless of status. *Example*: if I have a PM that generated on March 26th and is set for a 3 Month interval, on June 26th, the next PM is scheduled to generate. Then, the PM work order set to generate on June 26th **WILL** generate. If you select '**Last PM WO Must Be Complete'** for this option, the prior PM work orders MUST be 'Complete' in order for the future PM's to generate. Given the example above, the PM set to generate on June 26th **WILL NOT** generate if the March 26th PM work order status is anything other than 'Complete'.
- **Generate PM Work Orders automatically** – select this check box if you want the system to cycle through each PM schedule and determine which are ready to generate as PM Work Orders. If this option is selected, you will see this Window pop up when you login to the TeamWORKS Client.
- **Print PM Task List with Work Order?** –check this option if you want the PM Task List to generate when the work order generates. This will create more pages when your work orders generate.

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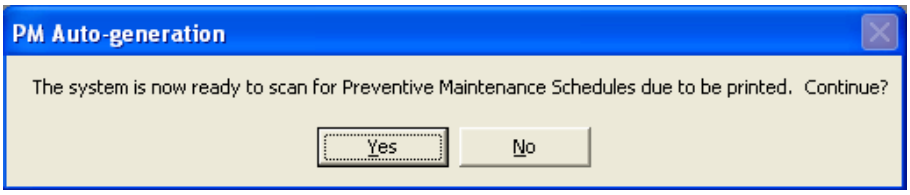
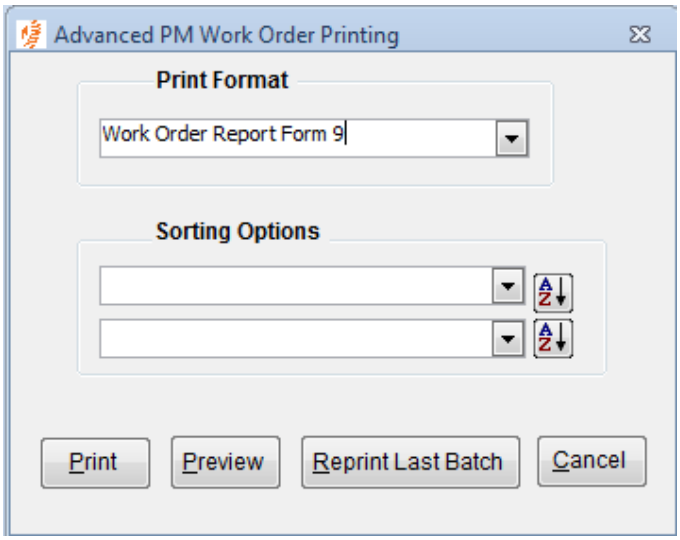
Automatically Generating PMs

If the Generate PM Work Order Automatically box is checked in configuration, then when the TeamWORKS Classic application is launched, the system will begin checking for PMs due at that time.



** You ONLY need to run PM's once per day. If you select 'No', you can always run the Generate PM's manually any time. If there are schedules to be printed, you will see the following form:



Work Order Format 9 is the default for PM Work Orders because it prints the Task and Material Lists on the first page. Any of the other Work Order formats will give you 2 pages per PM work order. Simply click 'Print' to print your PM Work Orders. When a PM Work Order is automatically generated, it creates it with the status equal to 'Approved'. Just like all work orders, if the PM's are printed and the PM Work Order Status is set to 'Incomplete'. If using the Mobile Work Order application, the PM Task List comes over to the device as well.

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PM Scheduling Wizard

The Wizard allows the user to go through the PM Scheduling process a single time and allows you to create multiple schedules rather than one at a time. *ONLY interval schedules can be created when using the PM Scheduling Wizard.*

The first step in going through the wizard is to select the Schedule Type for the PM's to create.

- **Asset PM Schedule** – example: use this option if you would like to create an individual PM for each Air Handler for every location. Therefore if I have 500 air handlers throughout all of my locations, then this wizard will create 500 PM schedules; one for each. The benefit of creating a schedule for each asset is that when the PM generates, it ties the work order, and ultimately time and materials back to that individual asset.
- **Master PM Schedule** – example: use this option if you would like to create a single work order by location and not asset specific. For instance, you want to generate PM's to do your quarterly AHU PM by Location only. Therefore, the system will generate 1 PM for each location you specify in the wizard and not for each of the 500 individual AHUs.
- **Non-Asset PM Schedule** – example: use this option if you want to create a single PM work order for each location on non-asset items. This is a good option when creating PM's for inspections, clock changes at DST, fire alarm inspections, etc.

After making the first selection on the PM Schedule Type, the second option will depend on the prior selection.

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Figure 1: When selecting an Asset Schedule

- **Select an Asset** – use this field to create a single Asset PM Schedule. Using this field will create only 1 PM for the selected Asset Number.
- **Select a PM Task** – from the drop down menu, select the PM Task you created for this type of asset.
- **Specify Locations** – check this box if you want to create PM schedules ONLY for specific locations. Leave unchecked if you want to create PM Schedules for all locations
- **Select an Asset Group** – make your selection for the Asset Group you want to generate PM's for
- **Select and Asset Subgroup (type)** – after making your Asset Group selection, this drop down box will filter out the Subgroups for that Asset Group selected
- **Select an Asset Subgroup2 (Code)** – after making your Subgroup selection, this drop down box will filter out the next level of assets
- **Reset** – will reset this form to 'blanks'

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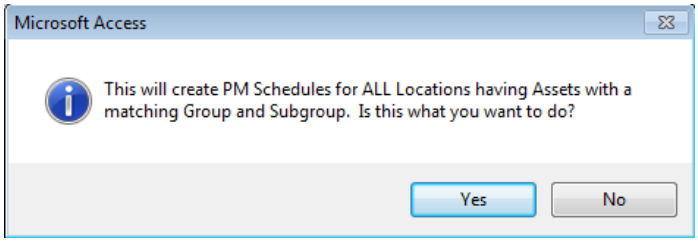
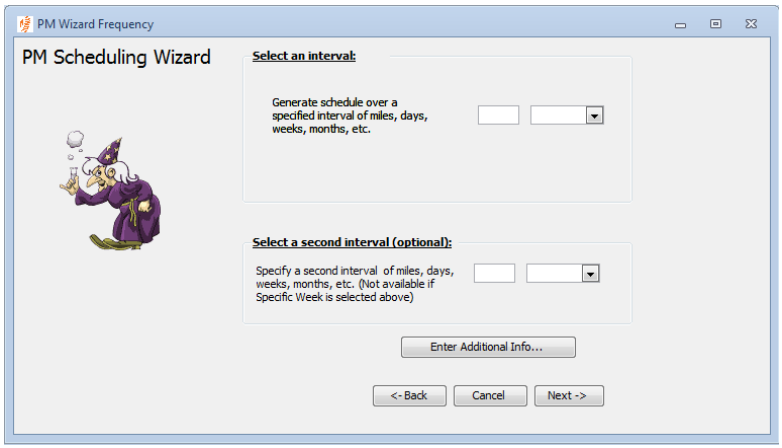
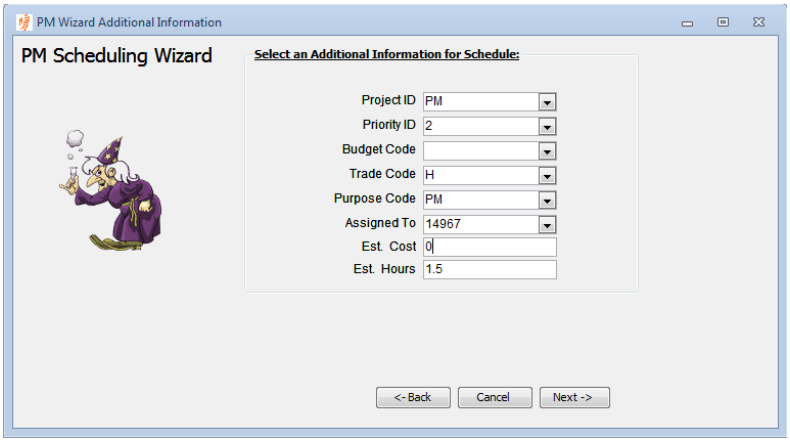


Hit Yes after confirming the message is correct. Hit no to cancel and make changes.



Enter the Scheduling Interval. You can select up to two intervals. Example: if you are creating this for vehicle 3K Mile oil change, you may want to set up Interval 1 as 3000 Miles and Interval 2 as 6 months. Then whichever interval hits first, that's when the PM will auto generate.

- **Enter Additional Info…** - here, the user can enter other information pertaining to the PM scheduling for the items.



Hit Next to go to next form……

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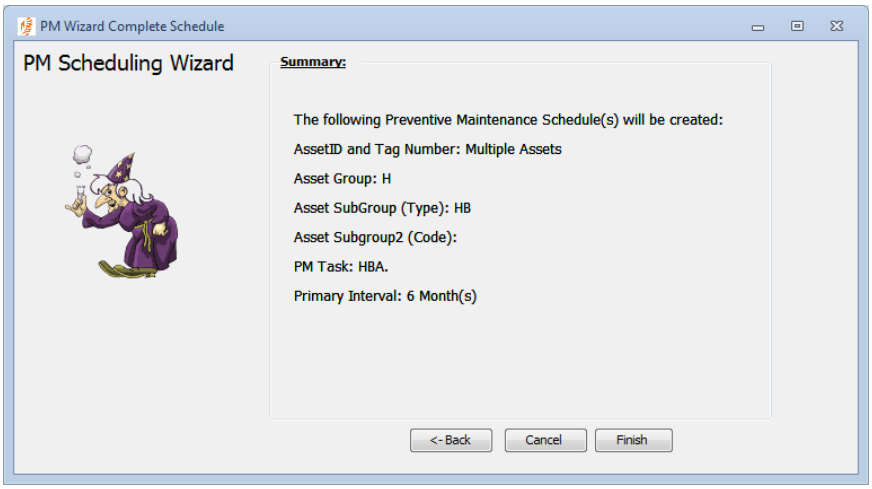

Click Finish to start creating your PMs. Depending on how many assets you have or how many schedules are being created, the creation process may take several minutes.

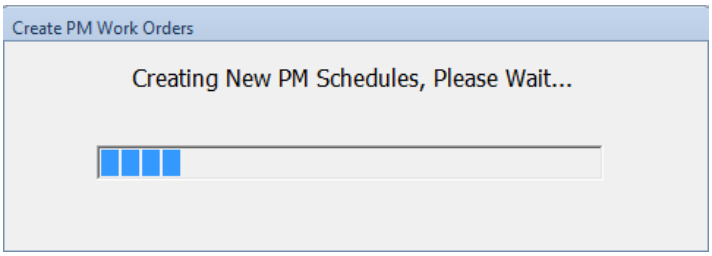

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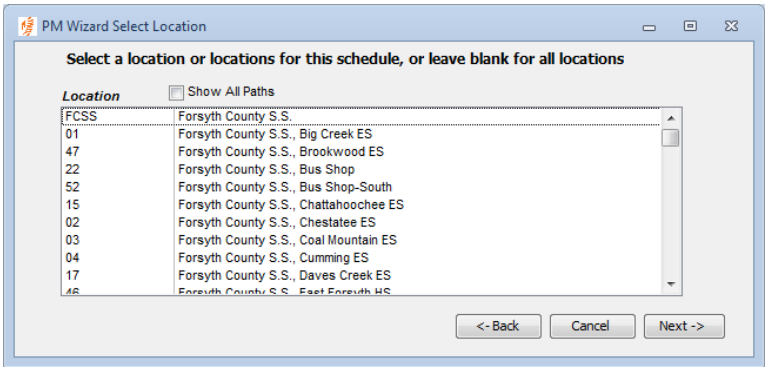
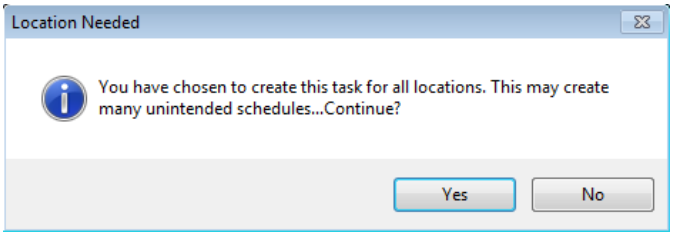
Figure 2: When selecting a Master Schedule

- **Select a PM Task –** select the task list for the Asset Group/Subgroup below.



- Select the location(s) for the PMs you want to create for. Leave blank for all locations.



- Click yes to confirm your selections.

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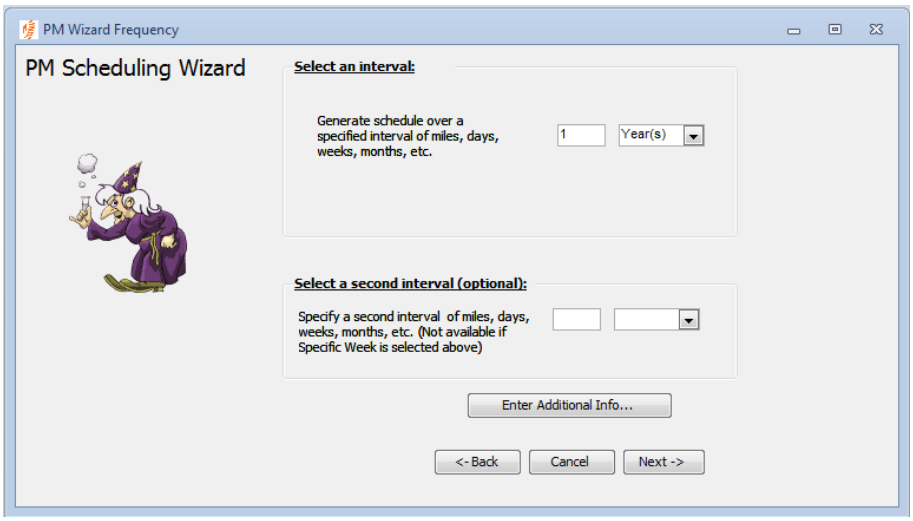
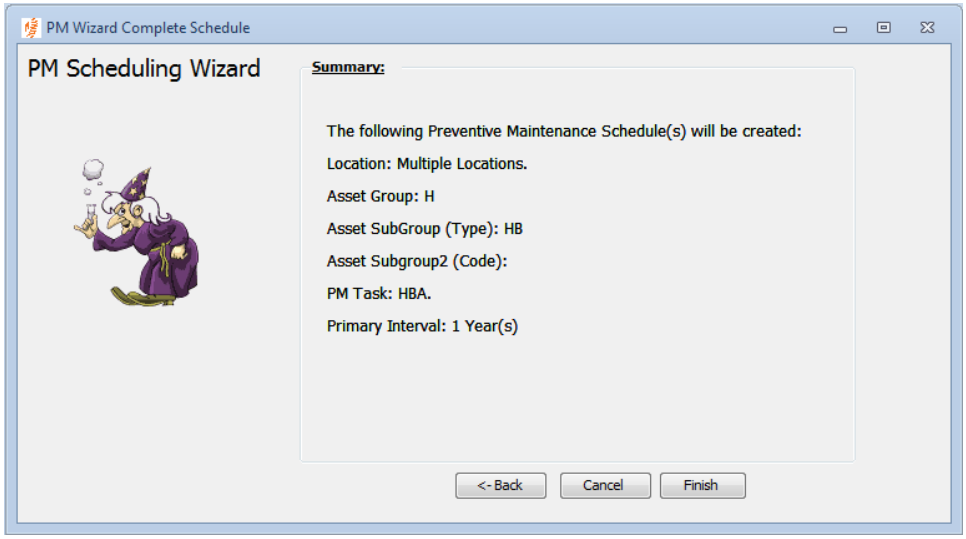


- Enter your desired PM Interval Frequency and Additional Information



- Click finish to complete the PM Wizard and build schedules.

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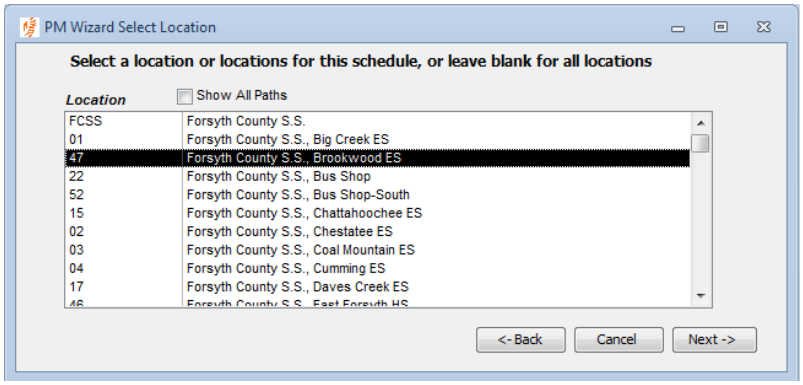
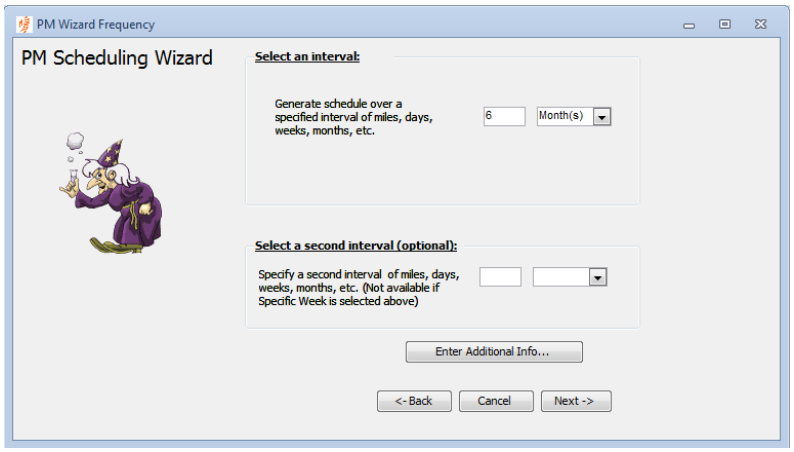
Figure 3: Selecting Non-Asset PM Schedule

- Select the PM Task, Asset Group and Asset SubGroup

- Select the location(s) for the PM Schedules to create.



- Enter the PM Frequency and Additional Information



- Click Finish to complete PM Scheduling Wizard

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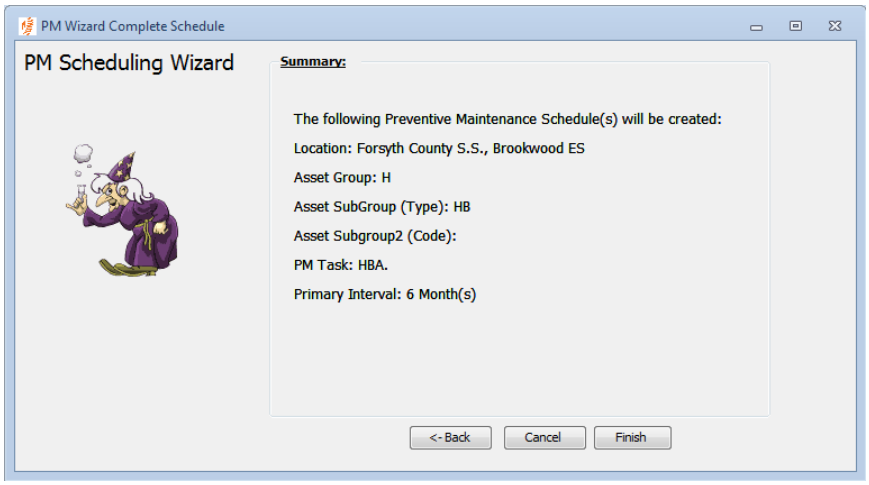
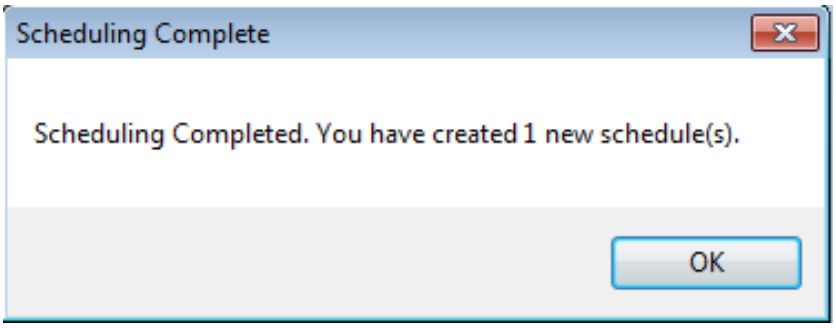


- When PM's are created, user is notified of how many schedules were created with message below.



Once PMs are created using the wizard, the schedules have not been generated yet. You can do so by selecting the "Generate Now"

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Reports

General Task List Report

This report list a general task list for scheduled PM's.

PM General Task List

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Facility Management Software

Asset Group	Task ID	Asset SubGroup	Description
	EnergyInsp		Energy Inspection
	PaintInsp		Paint Inspection
HVAC			
	A/C	COOLT	cooling tower
	AHU	AHU	Air Handler Unit
	AIRC	AIRC	Air Compressors
	CK Fil	RECOVER	Check Filters
	Condensing Units	COND	Condensing Units
	Cooling Tower	COOLT	Cooling Tower
	EUVENT	UVENT	Electric Unit Ventilator

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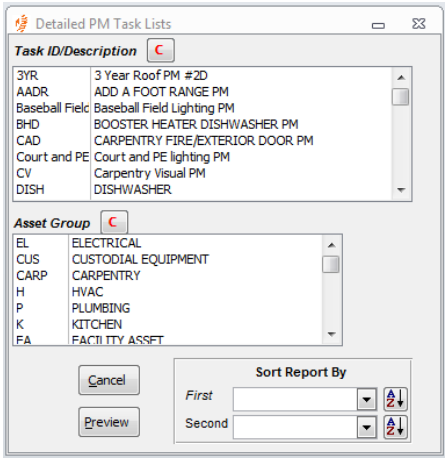
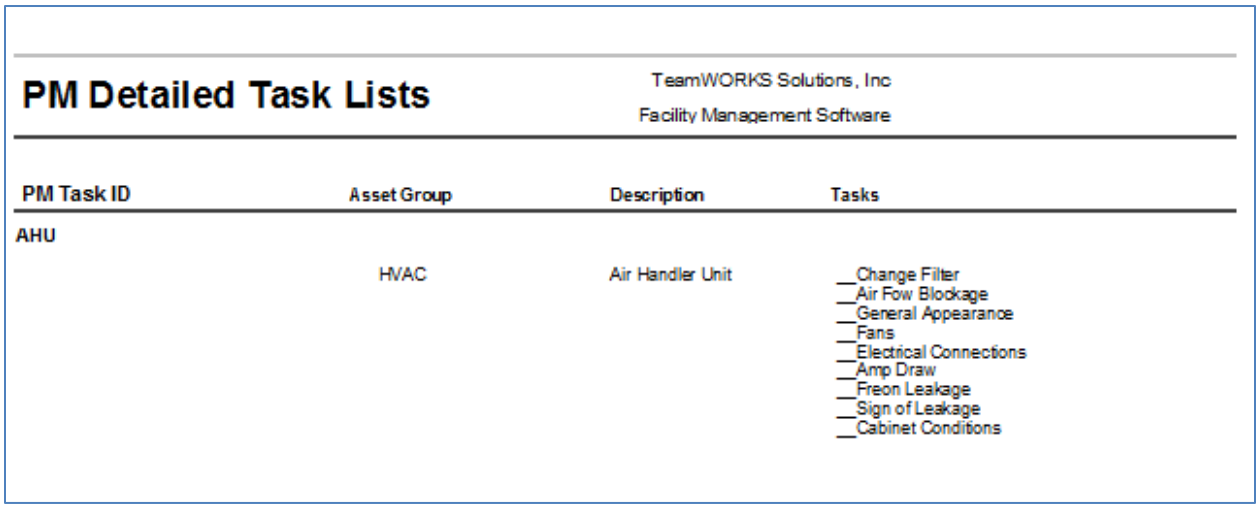
Detailed Task List Report

This report will give detailed task information for PM selected from Task ID, Asset Group and date range.





PM Detailed Task Lists

TeamWORKS Solutions, Inc

Facility Management Software

PM Task ID	Asset Group	Description	Tasks
AHU			
	HVAC	Air Handler Unit	__Change Filter __Air Fow Blockage __General Appearance __Fans __Electrical Connections __Amp Draw __Freon Leakage __Sign of Leakage __Cabinet Conditions

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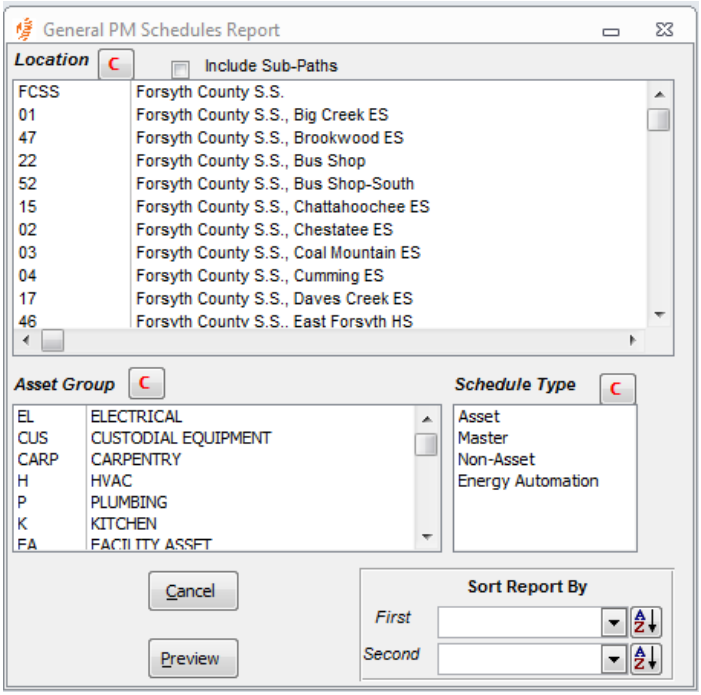
General PM Schedule Report

This report lists a general PM schedule selected by Location, Asset Group, Schedule Type and/or date range.



PM Schedules Report

Teamworks Solutions, Inc
Facility Management Sofware

Schedule ID	Sched. Type	Group	SubGroup	Name	Asset Tag #
BOONE COUNTY SCHOOLS					
1285	Master	HVAC	Filters		

PM Inspection ID	Task Description	Trade	Last Work Order	Last Unit	Last Date

BOONE COUNTY SCHOOLS, BOONE CO. HIGH SCHOOL

1175	Master	DOORS	CM LOCKS		

PM Inspection ID	Task Description	Trade	Last Work Order	Last Unit	Last Date
1175-CM LOCKS	ANNUAL CM LOCKS	KE	84859	0	3/29/2010
	Interval	2	7		
PM Inspection ID	Task Description	Trade	Last Work Order	Last Unit	Last Date
1175-HVAC-CHILL	Condenser, air cooled, over 100 tons-Annually	HVAC	0		1/1/1980
	Interval	12	6		

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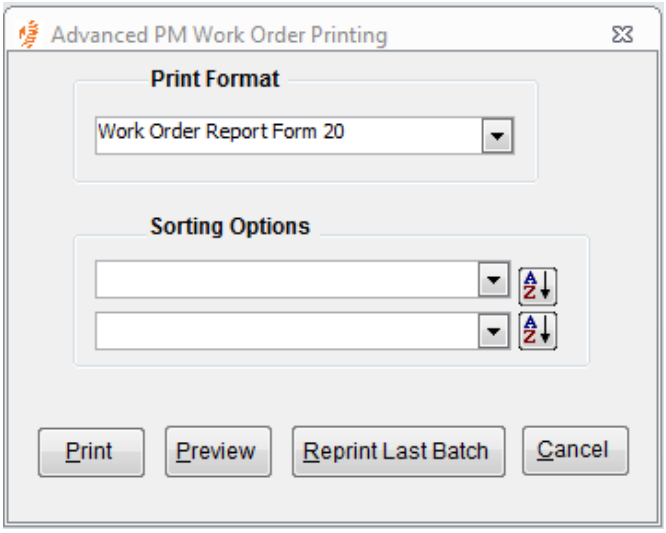
Reprint PM Work Orders

This report reprints the last batch of printed PM work orders.



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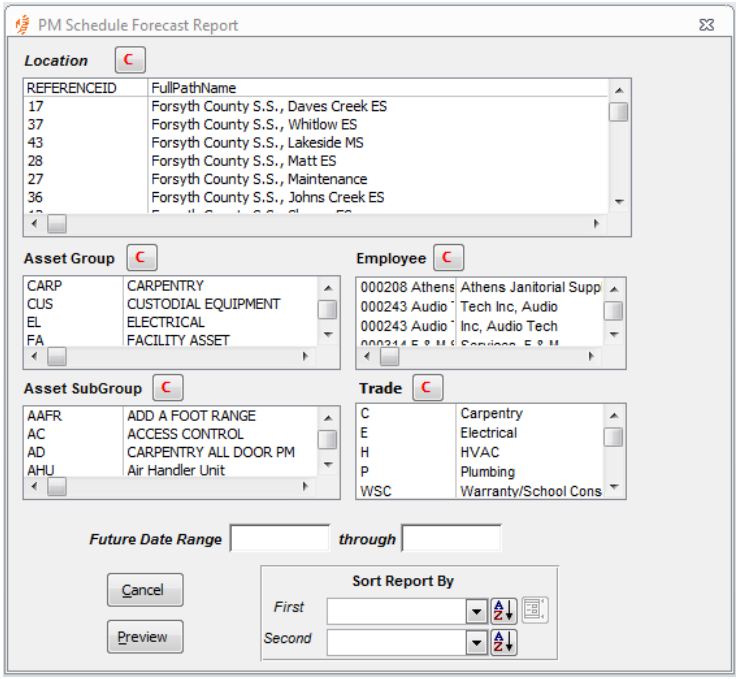
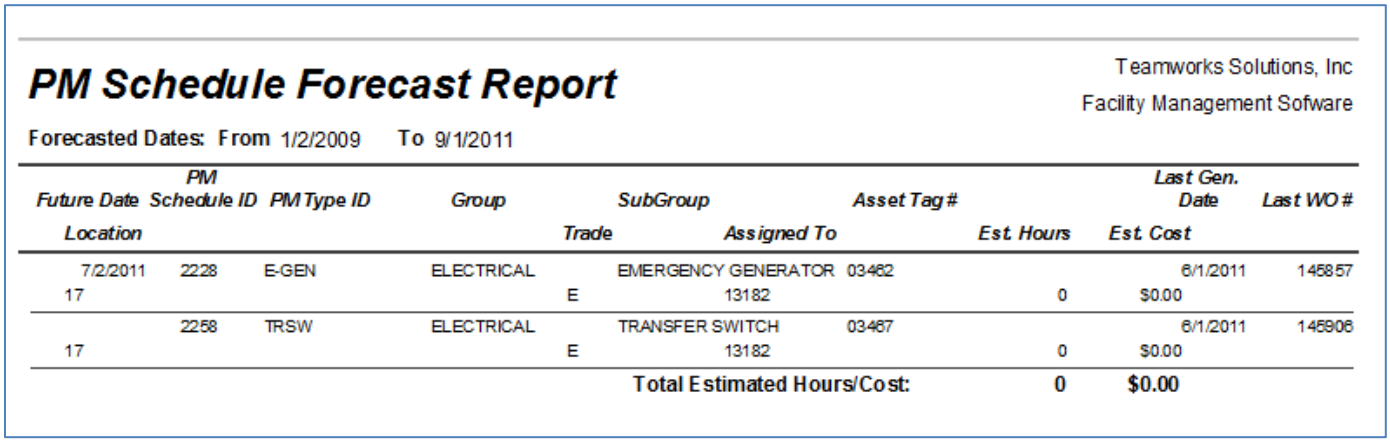
PM Forecast Report

Report provides future schedules for PM's selected by location, asset group, employee, asset subgroup, trade and/or date range.





PM Schedule Forecast Report

Teamworks Solutions, Inc
Facility Management Sofware

Forecasted Dates: From 1/2/2009 To 9/1/2011

Future Date / Location	PM Schedule ID	PM Type ID	Group	Trade	SubGroup / Assigned To	Asset Tag #	Est. Hours	Est. Cost	Last Gen. Date	Last WO #
7/2/2011	2228	E-GEN	ELECTRICAL		EMERGENCY GENERATOR	03462			6/1/2011	145857
17				E	13182		0	$0.00		
	2258	TRSW	ELECTRICAL		TRANSFER SWITCH	03467			6/1/2011	145906
17				E	13182		0	$0.00		
					Total Estimated Hours/Cost:		0	$0.00		

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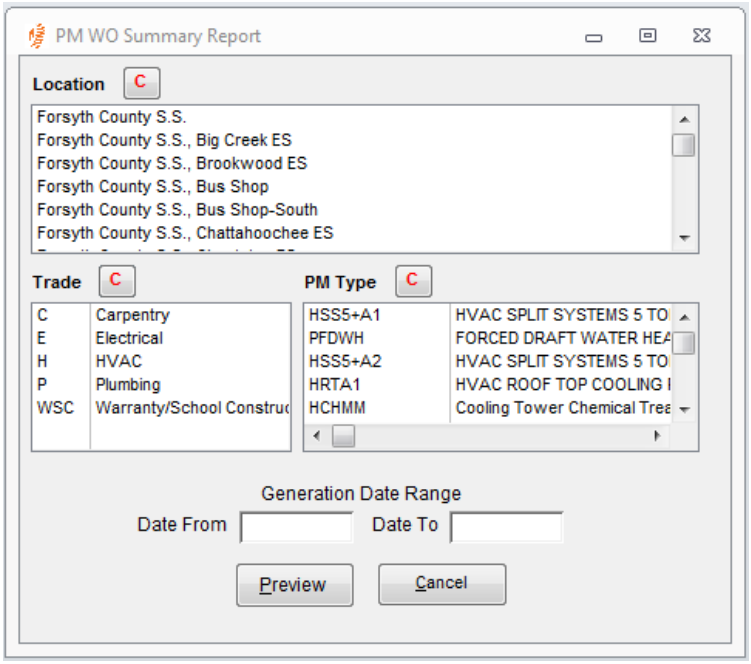
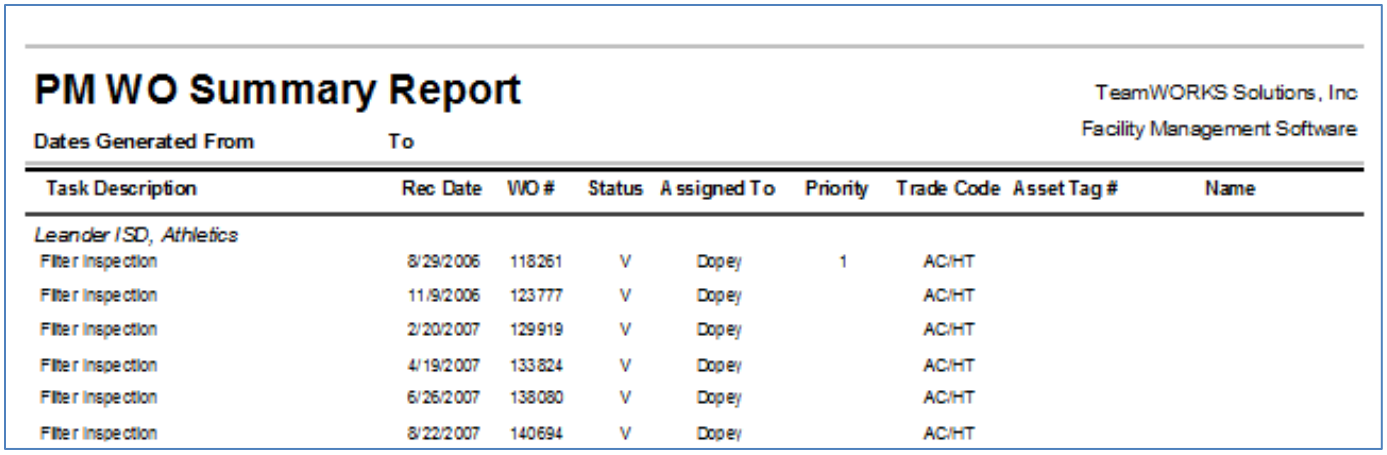
PM WO Summary

Report provides PM Work Order summaries location, trade, PM type and/or date range.





PM WO Summary Report

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Facility Management Software

Dates Generated From **To**

Task Description	Rec Date	WO #	Status	Assigned To	Priority	Trade Code	Asset Tag #	Name
Leander ISD, Athletics								
Filter Inspection	8/29/2006	118261	V	Dopey	1	AC/HT		
Filter Inspection	11/9/2006	123777	V	Dopey		AC/HT		
Filter Inspection	2/20/2007	129919	V	Dopey		AC/HT		
Filter Inspection	4/19/2007	133824	V	Dopey		AC/HT		
Filter Inspection	6/26/2007	138080	V	Dopey		AC/HT		
Filter Inspection	8/22/2007	140694	V	Dopey		AC/HT		

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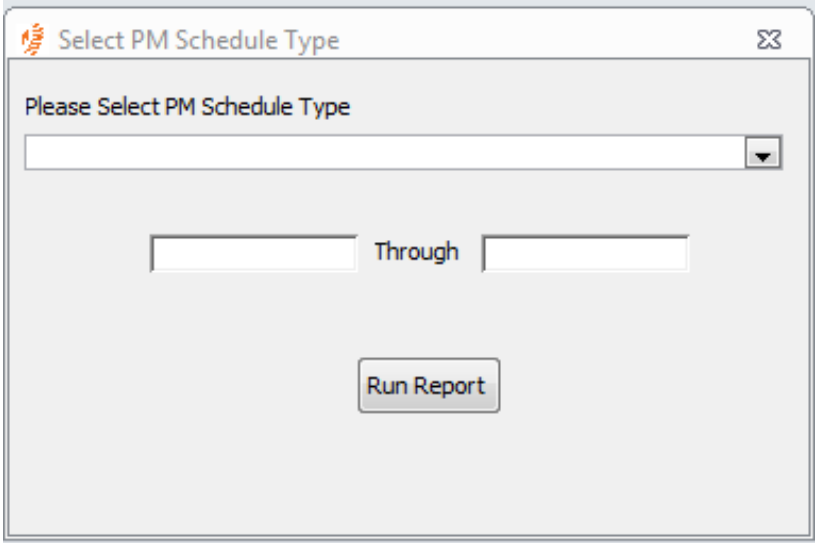
PM Work Order Report

Report provides PM Work Orders selected by schedule type and date range.



PM Work Orders

Teamworks Solutions, Inc
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Received Date	Project ID Description	WO ID	WorkOrderStatus	Completion Date ActionTaken	Trade Code	Asset Tag #	Asset Name
Forsyth County S.S., North Forsyth HS							
3/2/2010	PM Baseball Field Lighting PM	121090	L	3/8/2010 PM'ed Equipment	E	04627	BASEBALL FIELD LIGHTIN
Forsyth County S.S., South Forsyth HS							
5/10/2010	PM Baseball Field Lighting PM	124068	L	5/10/2010	E	04473	BASEBALL FIELD LIGHTIN

Customer Support

Email: Support@goTeamWORKS.com

Telephone: Toll Free (866) 892-0034

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