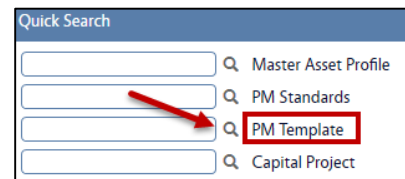## PM Specialist: Preventive Maintenance Templates

The Preventive Maintenance (PM) Template is the main screen used for creating preventive maintenance work orders in the system. The PM Template identifies what work is to be performed, the frequency of this work, and the asset on the phase(s). Generally speaking, you only need to create a new PM template when setting up Preventive Maintenance with a single PM Standard across multiple GU buildings. For auxiliary buildings, you'll setup one template per building and PM activity.

1. From WorkDesk under Quick Search, select **PM Template**

2. Click: **NEW**

3. Enter data into the following fields:

a. **Template**
AiM defaults a system generated number. If you prefer, replace with another ID.

b. **Description**
Example: **Area or Part name / Frequency**

c. **Active**
Yes, indicates the PM Template is available for use.

d. **Project** – *OPTIONAL*
If associated with a Project, enter the project number and then it will be included on the PM work order when generated.

e. **Projection End Date** - *Leave Blank, unless associated with a Project…*
Enter end date for projecting PM template schedule dates upon saving

    f. **Organization**

        Refer to Account cheat sheet, Click: 🔍 to select responsible institution, department, and organization such as EHS. (*e.g. D0509 – Business Operations*)

        i. **Requestor, Contact, Phone and Email.** *Leave Requestor blank.* For contact details, enter person who best understands the nature of the work.

    g. **Problem Code** *Leave Blank*

    h. **Type**   Click: 🔍 select **MAINTENANCE**

    i. **Category**   Select: **PREVENTIVE**

    j. **Status**   Choose: **OPEN**

    k. **Generation Method**

        i. **Work order Grouping** -two options to choose from, **OSU will use:**

          1. **Property by Template** - groups all assets assigned to a property onto one work order. Each phase has a different asset for the same property.

          2. Asset by Template- used for a single asset on each work order or for an asset that must be maintained by multiple shops/contractors. In this option, the PM Template could have multiple phases, each representing a different shop or contractor.

        ii. **Type** –   Click: 🔍 Choose one of the following:

          1. **Fixed**: A PM work order will generate for each fixed date entered in the Template Asset Projected Dates, regardless whether the previous generated PM work order has been completed.

          2. Timed: Generates one frequency period after the work order has been completed. (The phase[s] must reach a status of PM COMPLETE). At that point, the system updates the PM LAST DATE field and a new PM work order generates, one frequency period later.

          3. Calendar: Generates for each fixed date entered in the scheduling calendar. When this PM Type is selected, the Calendar Dates option on the View/Select menu becomes available for defining the fixed dates.

          4. (Currently Not in Use) Metered: Generates when a specified meter reading interval has been reached. When this type is selected, the Interval field becomes available. Actual meter readings are entered in the Asset, PM or Rapid Meter Reading screens.

          5. (Currently Not in Use) Fixed/Metered: Generates when a specified meter reading interval or a fixed date has been reached, whichever comes first.

        iii. **Frequency** - Click: 🔍 Choose how many occurrences per year.

        iv. **Parent Template** – If Nesting is required, enter the "least frequent" template ID to each child template. *Training Guide:* <u>Assets-PM_4.Generator</u>

        *A parent child relationship enables nesting of 'fixed' type PMs in order to retrieve the active superseding PM template. **Therefore, a Quarterly PM template references Semi-Annual and the Semi-Annual PM template references the Annual.** NOTE: The Parent template field shall remain "blank" on the least frequent template (e.g. Annual PM template).*

     v.   **Generation Buffer** – Enter "**20**," to allow generation within the same month.

       This enables you to enter a range of days which AiM will use to determine Nesting of work orders. For example, the generation buffer is 20. You have a Quarterly PM template with projected date of Jan 6 and its Annual parent template has a projected date of Jan 25, nesting will occur because the two projected start dates are within 20 days of each other.

The PM **Template Phase** screen defines details used by the **PM Generator** during creation of PM work orders.

1. From the PM Template screen, Add a **Template Phase**, Click: **Add**

   a.   Enter data into the following fields:

      i.   **Phase**   AiM defaults a system generated number. If you prefer, replace.

      ii.   **Description**   *(From iDesk, this will appear on the work order.)*

           1.   **{*insert frequency*} PM {*insert part name*} e.g. SEMI-ANNUAL PM SWITCH**

      iii.   **PM Standards** – Choose one of the following options:

           1.   Enter the standard chosen from *(PM_1. Standard.pdf)*

           2.   From the pop-up menu, Click: 🔍 to search & select a PM Standard

      iv.   **Funding Method**   Select one

           1.   **Work Code** (Energy Services)

           2.   **Property** (Grounds and Zones)

      v.   **Priority**   Click: 🔍 and select a **ROUTINE** (20 business days out)

      vi.   **Work Code**   Click: 🔍 and Select a Work Code

    vii. **Status**   Click: 🔍 Choose **OPEN**

    viii. **Shop**   Click: 🔍 Choose **Corresponding Shop** (*i.e. Electrical*)

        Enter information here if the same shop information applies to all assets on this template phase. Otherwise leave this section blank.

    ix. **Primary Person**   *Leave Blank* unless otherwise instructed

    x. **Request Method**   *Leave Blank*

    xi. **Contractor**

        1. Identifies an outside firm and, if necessary, the specific contract used to perform the PM work. The Address Code and Service Contract fields are populated based on the contractor selected. The Contractor field maybe left blank or populated. If populated, each generated PM work order for the PM Template will list the same contractor as appears on the Template Phase screen.

    xii. **Last Date Default**   Enter approximate last date work was performed.

    - IMPORTANT - Regardless of the last date the Supervisor provides, make sure to select a date after the 5th and before the 24th to ensure work orders Nest within the month.

        1. This is the seed date for populating the Last Date field on the template asset as asset(s) are associated. This defaulted Last Date may be overwritten on any template asset line item.

				Last Date Default	Jan 04, 2015 📅	
Template Asset					Remove	Load Equipment	Load Asset
☐	Sequence	Equipment	Asset	Shop	Contractor	Hold	Last Date
☐	1		14794			No	Jan 04, 2015

    a. From the **Template Asset** section, Click: **Load Asset**

        i. Search for assets by description, property or any other filters.

        ii. Select all of the Assets or individual Assets

        iii. Click: **DONE**

        iv. Click: Sequence number. **From Template Asset, assign Shop & Primary Person.**

4. Click: **DONE** until you return to the PM Template screen.

5. Click: **SAVE**