Landscape Tree Supervisor: PM Templates - Young Trees

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 one (1) PM template per Zone (10 zones) when setting up Preventive Maintenance for young trees and a default person will be assigned weekly per Zone.

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** – *This is for your reference only.*
    Example: **PM Standard – Zone # (e.g. IRRIGATION – ZONE 1)**

    c. **Active**
    Yes – indicates the PM Template is available for use in the system.

    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 Project…*

    Enter end date for projecting PM template schedule dates upon saving.

f. **Organization**

    i. **AAD0580** – *Landscape Admin Shop*

    ii. **Requestor, Contact, Phone and Email.** *Leave Requestor blank.* OPTIONAL, enter Supervisor's information who best understands the work to be performed.

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. Appendix: *Assets-PM_4.Generator*

    *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 detailed information used by the **PM Generator** during creation of a PM work order/phase.

4. 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 abbreviated PM Standard}* - PM (e.g**. IRR – PM**)

            2. iDesk User will view as: **T1175 Red Maple_IRR-PM_Property location**

            3.

        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

                NOTE: PM Standards created should *start with* "**LS**"

  iv. **Funding Method** – Choose:

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

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

  vi. **Work Code** – Type or Click: 🔍 and Select **TREES**

  vii. **Status** Type or Click: 🔍 to select **OPEN**

  viii. **Shop**   Click: 🔍 Choose **Corresponding Shop (***by Zone***)**
`   Enter the information of the shop (Zone) that applies to all assets on this template phase.

  ix. **Primary Person**   *Choose according to Supervisor's instruction for week*

  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.

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

  i. Search for assets by description, property or any other filters*. EXAMPLE: Choose "contains" from drop down menu. Enter "T"{insert 1st three digits of Asset ID}*

  ii. Select all of the Assets or **individual Assets**

  iii. Click: **DONE**

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

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

6. Click: **SAVE**