U622 PROGRAM PM SCHEDULING

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INTRODUCTION

- What are program PMs?
  - PMs required for fire and life safety equipment, critical equipment, and major building systems (i.e. HVAC)
  - Standardized PM text files have prescribed tasks, frequencies, estimated hours, and crews sizes. **Reference the PM Program Guide at K:\PLANNERS\Planner Training 2014\2014 Planner Quick Reference Training Aids\MODULE U622 – Program PM Guide**
  - Considered the standard PM for relevant equipment; in most cases the PM is used campus-wide
  - Generally, these PMs are fully funded by FM
### EQUIPMENT PM TAB

![EQUIPMENT PM TAB](image)

1. **Equipment:** 142-CHIL08 serves chilled water loop in BLDG 142, & chilled water coils.
2. **Parent:** 142-CHILPLANT01 supplies chilled water to AHC BLDGS of HS DIST (PM only).
3. **Asset Class:** REFRIG SYSTEMS
4. **Equipment Tab:**
   - **Equipment:**
     - COOL-1: Centrifugal & Rotating (Active)
     - COOL-193: Annual Condenser Tube Cleaning (Active)
     - COOL-134: Annual Centrifugal & Rotating Screw (Active)
   - **Next PM:**
     - COOL-1: Sat Feb 28, 2015
     - COOL-193: Sat Jan 31, 2015
     - COOL-134: Sun May 31, 2015
   - **Active Dates:**
     - COOL-1: Active dates are checked.
     - COOL-193: Active dates are checked.
     - COOL-134: Active dates are checked.
   - **Actual Travel Time:**
     - COOL-1: Actual travel time is checked.
     - COOL-193: Actual travel time is checked.
     - COOL-134: Actual travel time is checked.
   - **View:**
     - **Add:**
     - **Criteria:**
     - **Dates:**
     - **Last PM:**
     - **PM Routes:**
     - **Suspend All:**
EQUIPMENT PM TAB

1. From the Equipment Form, the PM Tab displays PMs that have been scheduled to the equipment
2. Show PMs LOV button displays ACTIVE, INACTIVE, or ALL PM files that are scheduled or have been unscheduled on a piece of equipment
3. Unique PM file name
4. PM file description
5. Next PM due date specifies when the PM must be completed. The work order issues earlier, depending on the “lead days” and “schedule days” programmed for the PM.
6. Active checkbox must be checked when scheduling a PM. If left unchecked a work order for the PM will not generate. If you uncheck a scheduled PM, the system will request that you confirm whether you wish to clear the next PM.
7. Actual Date checkbox, if checked, means the Next PM due date is a “Fixed” due date for the PM. If unchecked, the due date is based on “Last Completion” due date.
8. Travel Time checkbox is not used at Facilities Management.
EQUIPMENT PM - VIEW

![Image of PM scheduling software interface]

10. Reciprocating Chiller Operating Inspections
11. Preventive Maintenance
12. Task List

- Follow procedures in FM safety manual.
- Notify BASC and departments as required.
- Note additional work, materials, and estimated time.
**NOTE: No Program PM data can be changed on the Preventive Maintenance form; it can only be updated by BAS Staff.**

9. The View... button will display the PM text and default settings such as Lead Days, Schedule Days, prescribed Frequency, etc.

10. **Status:**
    - PROGRAM: All program PMs that are active
    - CUSTOMER: Planned PMs created for a customer
    - PLANNED: Planned PMs created by the District because there was no program PM that met the needs of the District
    - CUSTHOLD: Any PM put on hold by the customer; inactive status
    - HISTORICAL: Any PM no longer being used; inactive status
    - HOLD: Any PM put on hold by FM; inactive status

11. **Asset Type:** Equipment PMs are coded as EQUIPMENTMENT, and Facility PMs are coded as CUSTODIAL

12. **Category:** Categorized by District or Unit and equipment type such as electrical, fire protection, HVAC
EQUIPMENT PM - VIEW

Preventive Maintenance

PM Number: COOL-241
Status: PROGRAM
Asset Type: EQUIPMENT
Category: ZMPLUMB
Manufacturer:
Outage Class: DOWN

Assigned To:
Type: PREVENTIVE
Method: IN HOUSE
Priority: 4
Department:

Task List:
- RECIPROCATING CHILLER OPERATING INSPECTIONS
- FOLLOW PROCEDURES IN FM SAFETY MANUAL.
- NOTIFY BSAC AND DEPARTMENTS AS REQUIRED.
- NOTE ADDITIONAL WORK, MATERIALS AND ESTIMATED TIME.

Lead Days
- Work: 22
- Schedule: 1

Frequency
- Month: 1

Other Information:
- Labor
- Parts
- Tools
- POs
- Readings
- Where Used
- Cost
- Accounts...
- Dates
13. **Manufacturer:** Not being used by FM
14. **Outage Class:** Equipment status for PM to be performed
15. **Assigned To:** Not being used by FM
16. **Type:** Will always be PREVENTIVE for Programmed PMs
17. **Method:** Usually the method is IN-HOUSE personnel. Fire Suppression PMs performed by contractors are coded as CONTRACT
18. **Priority:** PM priorities are 41 for FLS equipment, 42 for critical equipment, and 43 for non-critical equipment
19. **Department:** Not being used by FM
20. **Lead Days /Work:** Number of days in advance that a PM work order will be issued before the due date in the Next PM field
21. **Lead Days / Schedule:** The number of lead days before the PM start date; this is normally “1” for all PMs
22. **Interval:** Unit of time between scheduled PMs
23. **Number:** The number of “time intervals” between PMs
24. **Task List:** Detailed step-by-step description of the work to be performed on the PM
25. Clicking the Criteria... button accesses PM scheduling information for the selected PM
Intentionally Left Blank
EQUIPMENT PM — SCHEDULING CRITERIA

Scheduling Tab

26. Default Interval and Number are populated. Select Override interval or Number if the PM is to be issued more or less frequently than the default. **Prior MOC approval is required to schedule a program PM more frequently, and it is not recommended to perform program PMs less frequently than the default, although there are exceptions.

27. Last Completion Date: No longer being used by FM

28. Fixed Due Date: Enter the date when the first PM will be “due” to be completed. The PM work order will be issued earlier, depending on the default “lead” days entered on the PM file.

29. Usage-Based: Not being used by FM

30. Condition-Based: Not being used by FM

31. Season Starts/Ends: If the equipment is only run on a seasonal basis, enter a specific date when the equipment is started up and when it is shut down. The PM will issue between that date range. The date format for the Start and End field is 15-OCT.
EQUIPMENT PM – SCHEDULING CRITERIA

Options Tab

32. Select the **Account Group Name**, which basically points to which account number should be charged.

   - **EQUIPMENT ACCT GROUP (EQUIPMENT)**: Bills the account number attached to the equipment itself. Do not enter an account number from the Accounts... button.
   - **EQUIPMENT PM ACCT GROUP (EQUIP_PM)**: Select if PM will bill an account number that is different from the equipment account number or different from PM file account number. This selection requires that you enter an account number from the Accounts... button.
   - **(TENANTS & DEPARMENTS) GROUPS ACCT GROUP**: Not being used by FM.
   - **PM ACCT GROUP (PM)**: Bills the account number attached to the PM itself if it has an account number assigned to it. Do not enter an account number from the Accounts... button.

33. **Holiday Calendar**: Default is checked; you will need to uncheck this box

34. **Valid Work Days**: Default is Monday through Friday; you will also need to check Sunday and Saturday

35. **Valid Work Weeks**: Not being used by FM
EQUIPMENT PM – SCHEDULING CRITERIA

Criteria - 142-PUMP00 / ANNUAL FIRE PUMP FLOW TEST

- **Crew:** HSTM5-LM
- **Craft:** ELECTRIC
- **Est Hours:** 1
- **Crew Size:** 1
- **Secondary Labor:**
  - **Include:** CPLANNER
  - **Crew:** CONTRACT
  - **Est Hours:** 0.00
  - **Crew Size:** 1
  - **Task List:** CONTRACTOR SHALL PERFORM ANNUAL

**Notes:**

- **36:** Crew and Craft
- **37:** Est Hours and Crew Size
- **38:** Include
- **39:** Task List
EQUIPMENT PM – SCHEDULING CRITERIA

Override Tab

36. Occasionally, PM files have a default primary Craft assigned under the Standard column. To change the Crew and Craft to reflect the District’s Crew/Craft assignments, enter them in the Override column. The Assigned To field is generally not used at this level.

37. Program PM default estimated hours and crew sizes appear in the Standard column. To change the estimated hours or crew size to meet the needs of the equipment or District, enter them in the Override column. **Prior MOC approval must be obtained to change estimated hours and crew sizes**

38. Check the Include checkbox for each secondary labor entry created, conversely, uncheck the box to **not** include the secondary labor entry

39. The first line is populated with the PM file’s default secondary labor data. To override the default data, enter the override requirements on the second line that is not grayed out.
## EQUIPMENT PM – SCHEDULING CRITERIA

### Criteria - 142-00P04 / DRY VALVE / QUICK OPENING DEVICE TRIP TEST

**Scheduling**

<table>
<thead>
<tr>
<th>Standard PM Task List</th>
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<tbody>
<tr>
<td>SAFETY PRECAUTIONS: WEAR ALL REQUIRED PERSONAL PROTECTIVE EQUIPMENT (EYE, HEAD, HEARING, HAND, RESPIRATORY PROTECTION ETC.) AS REQUIRED AND IMPLEMENT ALL APPROPRIATE SAFETY WORK PRACTICES (IE CONFINED SPACE ENTRY, LOTO, HEAVY LIFTING/RIGGING, FALL PROTECTION, HOT WORK, ETC.). REVIEW THE WO TASK SPECIFIC PPE AND SAFETY PRECAUTIONS WITH YOUR SUPERVISOR.</td>
</tr>
</tbody>
</table>

| NOTIFICATION: NOTIFY APPLICABLE CENTRALLY MONITORED STATIONS (IE BSAC, PSEECC, SIMPLEX, ETC.) AND AFFECTED DEPARTMENTS/CUSTOMERS PRIOR TO PERFORMING THIS PM. |

### Additional Tasks

<table>
<thead>
<tr>
<th>ADDITIONAL TASKS</th>
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<tr>
<td>6 PREACTION VALVES, 3&quot;, <strong>ANNUAL TEST ONLY; NO INSPECTOR’S TEST</strong></td>
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**Options**

**Override**

**Task List**

**OK**  **Cancel**
Task List

40. The Standard PM Task List is the default task list for the PM. This information cannot be edited from this screen.

41. Additional Tasks can be added to any PM if needed. There is a immense amount of space for text in this field. The text will appear below the Standard PM Task List when the PM work order is printed.

42. To open an Editor window for the Additional Tasks field, select Edit from the menu then select Edit Field, or hold down the Cntrl + E keys at the same time while your cursor is in the field. The Editor window provides improved viewing and easier text entry. Be sure to click the OK button to save the data that was entered.
• Dates... button displays dates and times when the selected PM was entered or modified for the equipment. The By field indicates the User ID of the person that changed the record.
Last PM... button displays the last scheduled information and the last work order number, status, start date, and due date, completion date, and assigned to data for the PM selected for the equipment.
PM Routes... button displays equipment routes that the equipment has been placed on so that multiple PM procedures can be performed on them. 

*Equipment Routes are normally created for equipment that is located in close vicinity and similar equipment types. PM Routes are covered in training unit U624 - Route PM Management.*
Suspend All... button suspends all PMs currently scheduled for the equipment. A pop-up message will ask for confirmation before suspending the PMs. **NOTE** All PMs will also be suspended if the equipment Status field is changed to an inactive status (OFFLINE, INFO, INVALID). COMPASS will ask for confirmation before suspending the PMs.
1. To unschedule a PM, make sure the Last PM... work order is CLOSED
2. Right-click the WO number and select Close...
3. Change the Status field to CLOSED
4. If the WO will be canceled, change the ACTION field to EXEMPT PM
5. Click the Audit... button and enter the reason why the work order was exempted from being completed
6. Finally, send an email to the District Admin Director with the WO number, and the reason why the PM WO was canceled
7. Remove the check mark from the Active checkbox
8. Click Yes when the pop-up box asks to clear the Next PM date
9. Select the INACTIVE PMs to Show
10. The PM that was unscheduled should appear on the INACTIVE PM list
11. Now add a note to the equipment record by clicking the Attachments icon.
12. Select the PM MODIFICATIONS note title and click the View... button.
13. Enter a note above the previous note that includes the date, reason why the PM was unscheduled, and your initials.
Whenever a PM record is modified, the change must be recorded in the equipment notes. The Standard Note Title used for PM modifications is:

**PM MODIFICATIONS:** Use when modifying a PM task attached to piece of equipment. *Do not check the print box.*
**Program PM Modification Exercise**

**Exercise 1**

1. Query up a control air compressor in your District
2. Change the equipment’s PM Group to a different compressor PM group (hint: COMP%)
3. Unschedule the currently scheduled “inspection” PM
4. Close the Last PM... if it is still open
5. Make sure to change the Action to EXEMPT PM and add a comment on the Audit screen
6. Schedule the new PM that was auto-filled when the **PM Group** was changed by clicking the Criteria... button

7. Enter the Fixed Due Date when the PM will be due
8. Select the Options tab
9. Select the Account Group Name (usually Equipment Acct Group)
10. Make sure all the days of the week are checked for the Valid Work Days
11. Uncheck the Use Holiday Calendar checkbox
12. Select the Override tab
13. Enter the Crew and Craft
14. Enter the Next PM due date (hint: the same date that was entered on the Criteria Scheduling tab)
15. Edit the PM MODIFICATIONS Standard Note Title with the changes you made to the PMs