FACILITIES MANAGEMENT
600 PMs

U623: Planned PM Management
U623 PLANNED PM MANAGEMENT

SUBJECTS COVERED IN THIS UNIT:

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INTRODUCTION

What are Planned PMs?

- PMs created at the discretion of the District or customer when there is no Program PM that adequately addresses the preventative maintenance needs

- Created to maintain equipment that affects building safety, building use intensity, or to meet customer requirements

- Monitored for compliance

- May be funded by FM or by customer (departmentally funded)
IDENTIFYING PLANNED PMS

- To view existing Planned PMs, access the Preventive Maintenance form
- Perform a query with “PLANNED” in the Status field
IDENTIFYING PLANNED PMS

1. PM Number: DRAIN-01
   Description: SANITARY WASTE, CLEAN OUT DRAINS OR TRAPS

2. PM Information:
   - Status: PLANNED
   - Asset Type: EQUIPMENT
   - Category: ZMPLUMB

3. Work Order Information:
   - Assigned To:
   - Type: PREVENTIVE
   - Method: IN HOUSE

4. Lead Days:
   - Work Schedule: 1

5. Frequency:
   - Month: Not specified
   - Number: 3

For all required personal protective equipment (respiratory protection, etc.) as required and safety work practices (i.e., confined space, rigging, fall protection, hot work, etc.) review and safety precautions with your supervisor.
IDENTIFYING PLANNED PMS

1. The PM number is based on the type of work being performed and/or the equipment type being maintained along with a sequence number (e.g. -01, -02, -03). Refer to the Planned PM Naming Standards at K: \ PLANNERS \ Planner Training 2014 \ 2014 Planner Quick Reference Training Aids.

2. Active Planned PMs have a Status of PLANNED

3. The PM CATEGORY should be ZM for global PMs and the type of equipment being maintained (e.g. ZMHVAC, ZMPLUMB)
Exercise 1

1. Access the Preventive Maintenance form from the Navigator screen and a blank form will appear ready for data entry.
2. Read the Planned PM Naming Standard document before assigning a name.

K: \ PLANNERS \ Planner Training 2014 \ 2014 Planner Quick Reference Training Aids \ MODULE U623 – Planned PM Naming Standards
3. Query the database for any existing “DRAIN%” PMs
4. Scroll through the query results and make a note of the next available sequence number (e.g. -01, -02) to add to the new PM name
5. Clear the Preventative Maintenance form and enter “DRAIN-” and the next available sequence number in the PM Number field
6. Enter a brief PM description in the field next to the PM Number field
7. Select PLANNED for the Status field
8. Select EQUIPMENT for the Asset Type if the PM will be assigned to a piece of equipment. If the PM is for custodial equipment (e.g. 142-CUST-02), select FACILITY.
9. Assign a Category; usually ZM and corresponding equipment type

10. Assign an Outage Class of DOWN if the equipment cannot be used while performing the PM. If the user of the equipment must be notified, then select NOTIFYDOWN. Otherwise leave it blank.

11. Enter PREVENTIVE in the Type field for EQUIPMENT Asset Types or enter CUSTODIAL for FACILITY Asset Types
12. Select IN HOUSE for the Method when the PM will be performed by FM staff or CONTRACT for PMs performed by contractors.

13. Select a Priority of 41, 42, or 43; referring to the PM Priority Code Quick Reference document at $K:\ PLANNERS \ Planner Training 2014 \ 2014 Planner Quick Reference Training Aids \ MODULE U623 – PM Priority Codes$
14. Enter the lead days allowed to perform the work in the Work field.

15. Enter the lead days allowed before the actual start date in the Schedule field. Normally “1” for all PMs, but can be higher in contracted PMs because of the time spent soliciting bids, awarding the contract, and creating POs.
16. Copy the safety and notification text from an existing PM Task List
17. Paste the safety and notification text in the new PM Task List
18. Enter a detailed description of the work in the Task List field below the safety and notification statements *(tip: Cntrl+E to open the Editor screen)*

19. Click the Labor button and enter the labor requirements; generally the craft, size, and estimated hours
20. Click the Account button
21. Select PM Account Group for Account Group Name
22. Select ACTUALS for the Billing Type
23. Enter the fund, Dept ID, Account, and Program

NOTE: Enter an account number only when the account number will be used for all pieces of equipment assigned this PM. If the accounts will vary by equipment, leave this blank, and assign the account number when the PM is scheduled.
Exercise 2
1. Access the Equipment form from the Navigator screen
2. Query up an OSANIWASTE active piece of equipment
SCHEDULING PLANNED PMS

3. Click the PMs tab
4. Put the cursor on the line below the last active PM
5. Enter the Planned PM number that you created in Exercise 1 and press tab to auto-fill the description
6. Click the Criteria button to schedule the PM
7. Enter a fixed due date; making sure the day is the last day of a month
8. Click the Options tab
9. Select Equip PM Acct Group if billing the equipment account number, or select the PM Acct Group if there was a PM Account Number programmed

10. Uncheck the Use Holiday Calendar box

11. Check all the days of the week for Valid Work Days

12. Leave the Valid Work Weeks defaults as they are
13. If using an Equipment Account Group, click the Accounts... button
14. Select Equip PM Acct Group for the Account Group Name field
15. Select ACTUALS for the Billing Type
16. Click the Accounts button
17. Enter the account number on the Account Details form and click OK
18. Enter the percentage to charge the account number on the Accounts form (must equal 100% if entering multiple account numbers)
19. Click OK from the Accounts form
20. Click the Override Tab
21. Enter the crew assigned in the Override column
22. Click the Task List
23. Enter any Additional Tasks if applicable
24. Click OK to return to the PM tab
25. Enter the Next PM date – the same date used for the Fixed Due Date on the Scheduling tab