FACILITIES MANAGEMENT
600 PMs

U624: Equipment PM Route Management
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INTRODUCTION

- A Preventive Maintenance Route is...
  
  - Created for similar pieces of equipment (e.g. supply fans, exhaust fans, WACs)
  - Created when similar tasks are performed (e.g. fan inspections, WAC start up)
  - Created for equipment located in one building (exceptions are Telecomm or Housing equipment)
  
  - Route work order consists of a “parent” work order number that appears in the Daily Schedule crew backlog, and is used for scheduling purposes only; no charges are applied to the parent work order.
  
  - Each equipment number on the route generates a “child” work order. The child work order numbers do not appear in the Daily Schedule crew backlog, but they do appear in the Current Schedule workbench.
Intentionally Blank Slide
EQUIPMENT ROUTE FORM
1. Access Routes from the Navigator
2. Route names and descriptions have been inconsistent in the past, but new standards can be found at the following location:
   \[ K: \text{\textbackslash} \text{PLANNERS} \text{\textbackslash} \text{Planner Training} \text{\textbackslash} \text{2014} \text{\textbackslash} \text{2014 Planner Quick Reference Training Aids} \]
3. Site is 01 for Minneapolis and 02 for St. Paul
4. Enter the building number in the Building field if all equipment is located in a single building. If the route includes equipment in various buildings, leave it blank.
5. The Equipment tab lists the equipment included on the equipment route
6. Click the Accounts… button to enter the account number to be billed
EQUIPMENT ROUTE FORM

1. Account Group Name: Route Acct Group
2. Billing Type: ACTUALS
3. Account Details:
   - Percent
   - Attribute1
   - Attribute2
4. Accounts:
   - Fund (4): 1000
   - Dept ID (5): 10286
   - Account #: 780101
   - Program (5): 21066
   - Chart Fd1 (10):
   - Chart Fd2 (10)

5. Account Details:
   - Project/Activity

6. OK button

7. 7
8. 8
9. 9
10. 10
11. 11
12. 12
13. 13
14. 14

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EQUIPMENT ROUTE FORM

7. Select Route Acct Group for the Account Group Name field
8. Select ACTUALS for the Billing Type field
9. Click the Accounts button
10. Enter an account number
11. Click OK on the Account Details form
12. Enter the percentage to charge (must total 100%), then click OK on the Accounts form
13. The Clear Acct button is not used
14. The Dates... button displays who modified the account number(s) and when
EQUIPMENT ROUTE FORM

15. The Preventive Maintenance tab lists all ACTIVE and INACTIVE PMs scheduled to the route equipment.
16. The View button displays the Preventive Maintenance form for the selected PM number with default frequencies, crew/craft, account numbers and PM tasks.
17. The Add button displays the Preventive Maintenance form so a PM can be queried and added to the list of ACTIVE PMs scheduled to the route.
18. The Criteria button allows scheduling of the PM, assigning of crews/crafts, estimated hours, accounts, and additional tasks.
19. The Last PM button will display the last PM parent work order number, work order status, start date, due date, and last date it was scheduled.
20. The Dates... button displays the modification dates of the PM, when it was last active/inactive, and who made the changes.
1. Before creating a new route, check to see if one already exists. Because naming standards have been inconsistent, query the Building and route description fields.
2. Name the Route

- Naming standards have been inconsistent in the past, but new standards can be found at the following location: \(K: \right PLANNERS \right Planner Training 2014 \right 2014 Planner Quick Reference Training Aids\)

- Example: 142EXH-01
  a. Building = 142
  b. Equipment nomenclature = EXH
  c. File number = 01
3. Select the equipment numbers for the route, based on the following criteria:
   - Same building
   - Similar equipment types
   - Same required PM tasks
4. Determine the PM procedures that will be scheduled, including:
   - PM Numbers to schedule
   - Due date for each PM
   - Crew/Craft that will be assigned to each PM
CREATING EQUIPMENT PM ROUTES

Exercise 1

1. Create a route for a single building to perform the annual motor control center procedure

2. Enter a route smart name following the Equipment Route Naming Standards located at K: \ PLANNERS \ Planner Training 2014 \ 2014 Planner Quick Reference Training Aids
3. In the route description field, enter the crew number assigned, a description of the equipment, and the building name spelled out.

4. Enter the Site number (01 = Minneapolis, 02 = St. Paul).

5. Click the Account button to enter billing information.

6. Select Route Acct Group for Account Group Name.

7. Select ACTUALS for the Billing Type.
8. Click the Accounts button

9. If PM procedure will be billed to FM, refer to the *Quick Reference: District, Building, Crew, and Default Account Number Combinations Report* to determine the correct billing account

10. Enter the account strings for the route and click OK
11. Enter 100 in the Percent field if the entire cost to perform the PM will be billed to the one account, then click OK
12. Enter the equipment numbers that will be maintained on the route
13. Click the Preventive Maintenance Tab to schedule PMs to the route
14. Enter the PM Number if known, or press the F9 key to query for a PM
15. Query the description field for the needed PM
16. Select the PM number you wish to schedule and click OK
17. Click the Criteria button to enter scheduling criteria
18. Enter a Fixed due date (use the last day of the month it is due)
19. Click the Options button to enter crew information
20. In the Route Account Group field, select Route Acct Group (ROUTE) if the PM will bill the account entered on the first screen of the route

21. In the Equipment Acct Group field, select Equipment Acct Group (EQUIPMENT)

22. Enter the crew that will perform the PM in the Crew Override field
23. Uncheck the Use Holiday Calendar box and click OK
24. Click the Valid Days button
25. Check the Sunday and Saturday boxes and click OK
26. Enter the Next PM Date again
27. Make sure the Active box is checked
MODIFYING EQUIPMENT PM ROUTES

- Remove equipment from the route
  1. Highlight an equipment number
  2. Click the Delete icon

Note: Do not remove equipment from a route if there are active route work orders, because the equipment number will also be erased from the active work orders.
MODIFYING EQUIPMENT PM ROUTES

- Add equipment to the route
  1. Scroll to bottom of equipment list
  2. Put cursor in the blank, highlighted equipment number field
  3. Enter the new equipment number(s)
DELETING EQUIPMENT PM ROUTES

- Routes cannot be deleted for historical reasons
- To cancel a route, enter *HISTORICAL* in the route description
DELETING EQUIPMENT PM ROUTES

- Make sure all PM work orders are closed for each PM scheduled by clicking the Last PM button while your cursor is resting on each PM Number.
DELETING EQUIPMENT PM ROUTES

- For each PM scheduled, uncheck the Active checkbox
- Answer Yes to clear the Next PM date
DELETING EQUIPMENT PM ROUTES

- PM that are unscheduled appear in the INACTIVE view
UPDATING EQUIPMENT PM ROUTE NOTES

• Any PM change made on a route, must be recorded in the Notes using a standard note title:

  • PM MODIFICATIONS – Use when modifying information on a PM record. Do not check the print box.
UPDATING EQUIPMENT PM ROUTE NOTES

- Click the Attachments icon
- Highlight the standard note title
- Click View to edit the note or New to insert a new note
- The most recent note is entered first in the note Text field