FACILITIES MANAGEMENT
600 PMs

U625: Facility PM Management
EXAMPLES NEEDED FOR TRAINING

Slide 6: Access the *Assign PMs to Facility* form and explain the fields and functions.
- Put special emphasis on the fact that Facility PMs are assigned the custodial account number when the PM is actually scheduled to the Facility.

Slide 12: Access the *Preventive Maintenance* form and review how to query up a Facility PM.
- Also review the PM data and the function buttons on the form.
- Explain how the Where Used button could be useful for viewing where else the PM was scheduled.
- Put special emphasis on the fact that the Facility PMs are not assigned account numbers on this screen, but when the PM is actually scheduled to the Facility.

Slide 16: Allow the students to work through Exercise 1, offering assistance if needed. When everyone is done, work through the example step by step on the projection screen.

Slide 20: Allow the students to work through Exercise 2, offering assistance if needed. When everyone is done, work through the example step by step on the projection screen.
SUBJECTS COVERED IN THIS UNIT:

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INTRODUCTION

What are Facility PMs?

• PMs that are assigned to a facility as opposed to a piece of equipment, i.e. district, building, and/or room number. Facility PMs are generally custodial tasks that need to be performed on a periodic basis.

• Facility PMs are standardized text files which have prescribed tasks, frequencies, estimated hours, and crews sizes.

• Facility PMs do not require notes be entered when they are modified, and they do not have Standard Note Titles like Equipment PMs.
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ASSIGN PMS TO FACILITY FORM

1. Navigate to the Assign PMs to Facility Form.
2. Enter PM Number: DUST-FLO02 and Description: CARPET EXTRACTION (PUBLIC CIRCULATION) - SUMMER.
3. Fill in the Location details: Site 01, Building 143, Floor, Room, Zone HEALTH SCI.
4. Set the Interval Type: Year, Number: 1, Next PM.
5. Select Actual?: Active.
6. Set the Season: Season From, Season To.
8. Optionally use holiday calendar.
ASSIGN PMS TO FACILITY FORM

1. Click Facility PMs from the Navigator screen to access the Assign PMs to Facility form.
2. To assign a PM to a new area, enter a PM Number to assign to the facility. To modify a PM currently assigned to a facility, query up the location and the PM number you would like to modify.
3. Enter the location information: Site, Building, Floor, Room, Zone.
4. If the scheduling criteria will be different from the Standard PM defaults, enter that information in the Override columns.
5. Click the Options button to assign the crew, craft, secondary labor, estimated hours and crew size. An Account Group Name must be selected and an account number to charge must be entered as well.
6. Enter the Next PM due date.
7. Actual? Checkbox: If the PM schedule is based on a fixed due date, the Actual? checkbox will always be checked. If the PM schedule is based on the last completion date, then the Actual? checkbox should only be checked if the schedule date was computed based on the actual completion date of the previous PM. If the PM schedule is based on last completion date, and the work order created by the last scheduled PM has not been completed, then the Actual? checkbox should NOT be checked.
8. Active Checkbox: Will be checked if the PM is active.
ASSIGN PMS TO FACILITY FORM

PM Number: CUST-FL002
Location:
- Site: 01
- Building: 143
- Floor
- Room
- Zone: HEALTH SCI

Scheduling Criteria:
- Interval: Year
- Number: 1
- Next PM
- Actual?: Active

Based On:
- Last Completion Date
- Fixed Due Date: THU SEP 15, 2005
- Use Holiday Calendar?

Season:
- Season From
- Season To

Last PM:
- Date: WED SEP 15, 2004
- WO Number: W000724502

Valid Days
Valid Weeks
Options
Dates
ASSIGN PMS TO FACILITY FORM

9. **Last Completion Date**: If the next scheduled PM is based on the actual date when the last PM was completed, select this item.

10. **Fixed Due Date**: If the next scheduled PM is based on a fixed due date, regardless of when the last PM was completed, select this item.

11. **Use Holiday Calendar?**: Check this box to allow for holidays in computation of schedule date, start date and due date of the PM.

12. **Season From**: Enter the date the season begins in format DD-MON.

13. **Season To**: Enter the date the season ends, in format DD-MON.

14. **Last PM Date**: The date the last PM was due.

15. **Last PM WO Number**: The last work order number that was issued for this Facility PM.

16. **Valid Days button**: Click this button to change the valid days.

17. **Valid Weeks button**: Click this button to change the valid weeks.

18. **Dates button**: Clicking this button displays the dates the Facility PM was modified and by whom.
To view the Facility PM file, perform a query from the *Preventive Maintenance* form, then use the **Pg up** and **Pg dn** keys to scroll through the PM files:

- **Type** = CUSTODIAL
- **Category** = Use the LOV and select one of the categories that begin with “CM…”
- Another option is **Asset Type** = FACILITY
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VIEWING FACILITY PMS
**NOTE** None of the Facility PM data can be changed on the Preventive Maintenance form; this data is updated only by Business and Applications Support (BAS) personnel.

Reference Fields:

**PM Information**
- **Status:** Facility PMs will have a status of PROGRAM, which is an active status.
  a. **CUSTOMER** – A PM file that was created for a customer and is set up with a customer account number; this is an active status.
  b. **PLANNED** – A PM file that was created by the District because there was no PROGRAM PM available to meet the needs of the District; this is an active status.
  c. **CUSTHOLD** – Any PM that was put on hold by the customer; this is an inactive status.
  d. **HISTORICAL** – Any PM that is no longer being used; this is an inactive status.
  e. **HOLD** – Any PM that was put on hold by FM; this is an inactive status.
- **Asset Type:** Facility PMs are associated with custodial PMs and Equipment PMs are associated with equipment/
- **Category:** Facility PMs have categories that start with “CM…”
- **Manufacturer:** Not currently being used by FM.
- **Outage Class:** The status the equipment needs to be in to perform the PM.

**Work Order Information**
- **Assigned To:** Not currently being used by FM.
- **Type:** Will always be CUSTODIAL for Facility PMs.
- **Method:** Facility PMs are generally done by in-house personnel (INHOUSE).
- **Priority:** PMs should always have a priority of 4.
- **Department:** Not currently being used by FM.

**Lead Days**
- **Work:** The number of days (excluding weekends and holidays) in advance that the PM work order will be issued before the due date that was entered in the Next PM field.
- **Schedule:** The number of lead days before the PM start date.

**Frequency**
- **Interval:** Unit of time between scheduled PMs.
- **Number:** The number of “time intervals” between PMs.

**Task List:** The detailed step by step description of the work to be performed on the PM.
VIEWING FACILITY PMS

PM Information
- PM Number: CUSTOM-FL001
- Asset Type: FACILITY
- Category: CM CARPET
- Manufacturer: 
- Outage Class: 
- Create Superseded WO?: 

PM Information
- Status: PROGRAM
- Assigned To: 
- Type: CUST DIAL
- Method: IN HOUSE
- Priority: 4
- Department: 

Task List
- EXTRATION CLEANING
- CHECK WITH SUPERVISOR ON EQUIPMENT AND ANY MANUFACTURERS RECOMMENDED PROCEDURES PRIOR TO BEGINNING WORK.

Work Order Information
- Lead Days:
  - Work: 99
  - Schedule: 25

Frequency
- Where Used:
- Cost:

Facilities Where Used
- Site: 01
- Building: 002
- Floor: 
- Room: 

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VIEWING FACILITY PMS

Reference Function Buttons:

- **Labor**: The default crew, craft, estimated hours and crew sizes are entered here.
- **Parts**: COMPASS parts that are required to complete the PM. This function is not currently being utilized by FM.
- **Tools**: COMPASS tools that are required to complete the PM. This function is not currently being utilized by FM.
- **POs**: POs that are associated with this PM. This function is currently not being utilized by FM.
- **Readings**: This function is not currently being used by FM.
- **Where Used**: Displays other locations where the Facility PM file is scheduled.
- **Cost**: A detailed estimate for the PM can be entered here, but this function is not currently being utilized by FM.
- **Accounts...**: Facility PMs will not have an account number assigned here because each building has its own custodial account number to charge. The account number must be entered at the time the Facility PM is scheduled to the Facility.
- **Dates**: Lists the PM modification dates and by whom.
ASSIGNING A FACILITY PM

EXERCISE 1
1. Click Facility PMs from the Navigator screen to access the Assign PMs to Facility form
2. Enter PM file CUST-FL001
3. Enter the location information
4. Click the Options button
ASSIGNING A FACILITY PM

5. Choose Facility PM Acct Group (FACIL_PM) from the drop down menu
6. Enter Estimated Hours, Crew, and Crew Size
7. Enter additional detailed information if needed in the Additional Task List field
8. Click the Accounts... button
9. Choose Facility PM Acct Group from the LOV
10. Choose ACTUALS from the LOV
11. Click the Accounts button
12. Referring to the document that lists the new districts, crews, and account number assignments on [http://www.facm.umn.edu/bas/newaccount.htm](http://www.facm.umn.edu/bas/newaccount.htm), enter the correct custodial account number and click OK
13. Enter the percentage to charge the account number (must equal 100%) and click OK
ASSIGNING A FACILITY PM

14. Click **OK** from the *Scheduling Options* form
15. Enter the **Next PM date**
16. Click the **Fixed Due Date** option, and the next PM due date will auto-fill
17. Click the **Save/Commit** icon or press the **F10** key to save
MODIFYING A FACILITY PM

EXERCISE 2
1. Query up the Facility PM that we assigned in Exercise 1
2. Change the Scheduling Criteria to once every 3 months
3. Enter season dates of November 1 to April 30 (hint: use format DD-OCT)
MODIFYING A FACILITY PM

4. Enter 01/30/09 as the new **Next PM** date, this is the date the first PM will be due within the season dates
5. Also enter the new date in the **Fixed Due Date** field
6. Click the **Save/Commit** icon or press the **F10** key to save the changes
The End!!!
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