

Planned Schedule

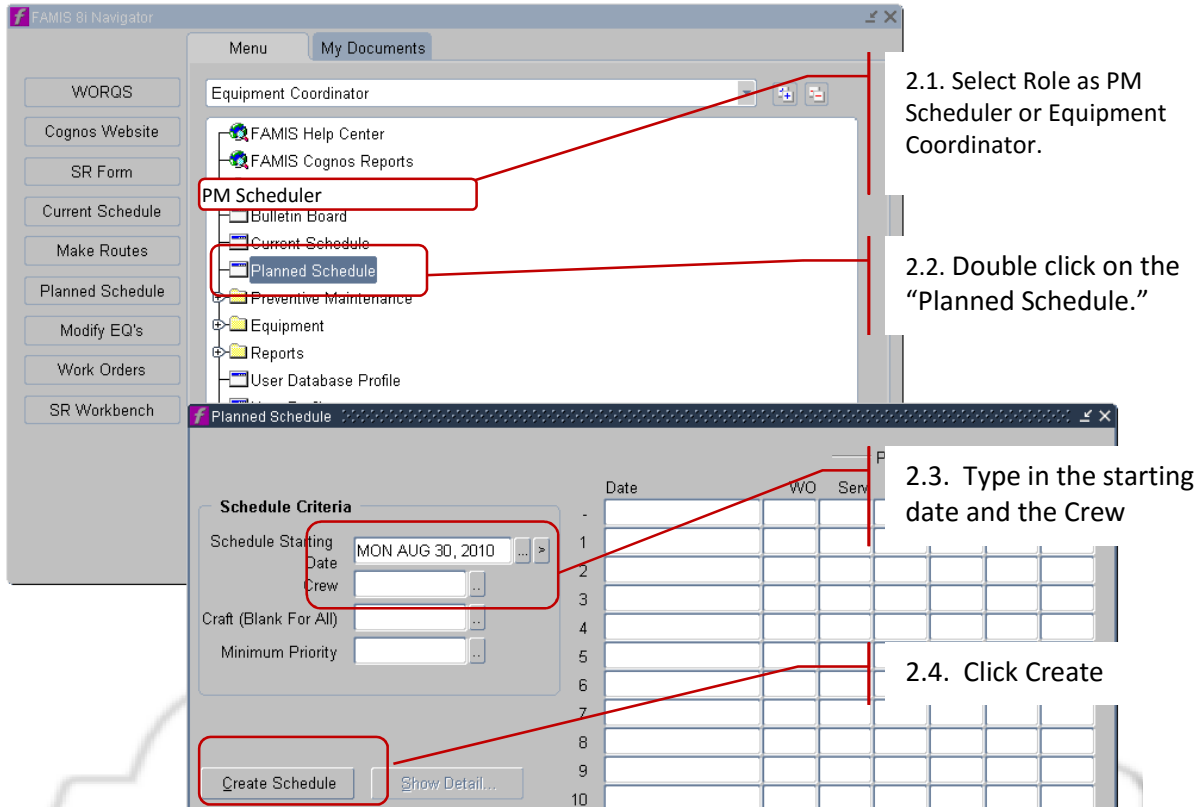
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1. Purpose

Below explains how the PLANNED SCHEDULE is used. The planned schedule allows the supervisor to view 12 weeks of upcoming work for respective crews. This schedule allows the supervisor to see and schedule PMs that are in the queue for the upcoming weeks and balance the workload. In this way, flexing the work to the manpower can be managed, especially helpful when working around vacations, absences, holidays, etc.

2. Navigating to the Planned Schedule

- 2.1 Select the role as “PM Schedule.” The planned schedule view is only available the role of “PM Scheduler” and “Equipment Coordinator.” If you require this visibility, contact your supervisor to obtain the authorization and paperwork.
- 2.2 Double click on the “Planned Schedule.” The form, Planned Schedule, will pop-up requesting additional information.
- 2.3 Type in the starting date and the Crew
- 2.4 Click Create Schedule.



2.1. Select Role as PM Scheduler or Equipment Coordinator.

2.2. Double click on the "Planned Schedule."

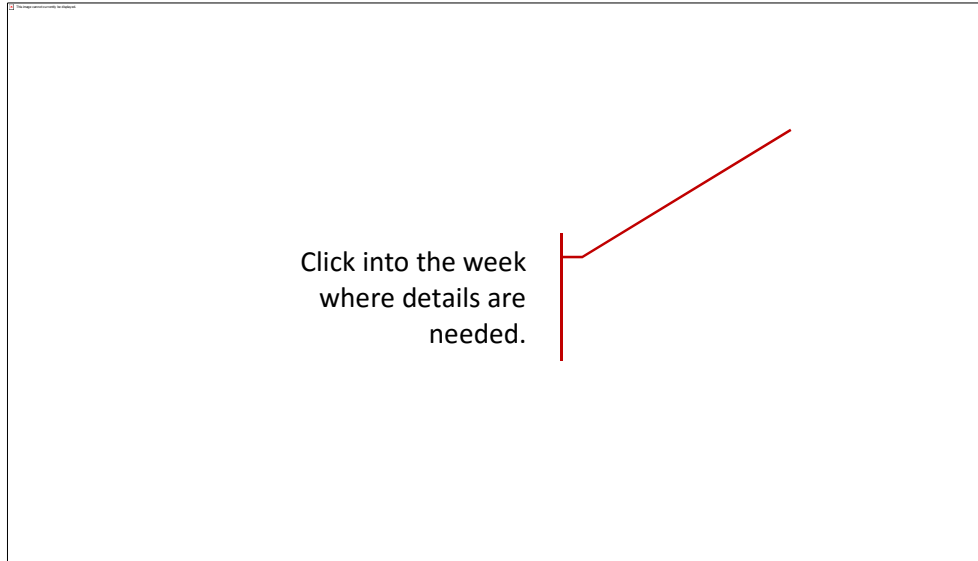
2.3. Type in the starting date and the Crew

2.4. Click Create

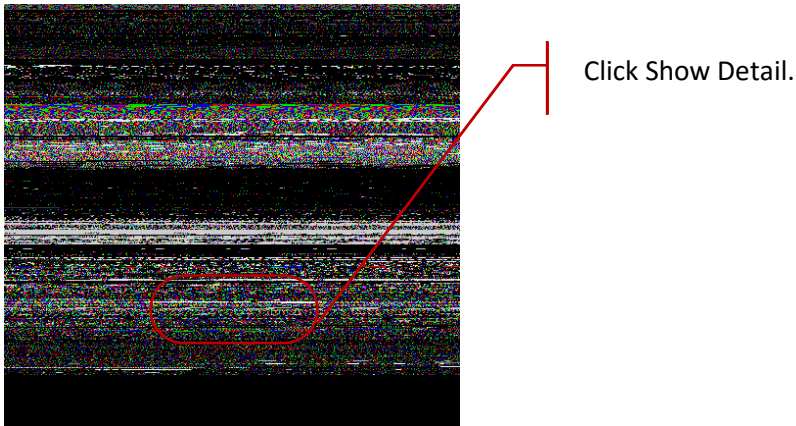
2.5 The screen will look like the following.

- 2.5.1 First column, Date, shows the next 12 weeks worth of work.
- 2.5.2 WO is the current work orders(trouble tickets) for the respective crews for that week. The 27 is estimated man-hours only. Man-hours are shown only if it is set up in the Prev Maint work orders. At this time only a *few* of the Preventive Maintenance procedures and all routes have man-hours setup. For the most part, ignore the WO column.

2.5.3 PM column is a schedule of the Preventive work orders that are *scheduled* to be generated. All Routes have estimated man-hours assigned for the work.



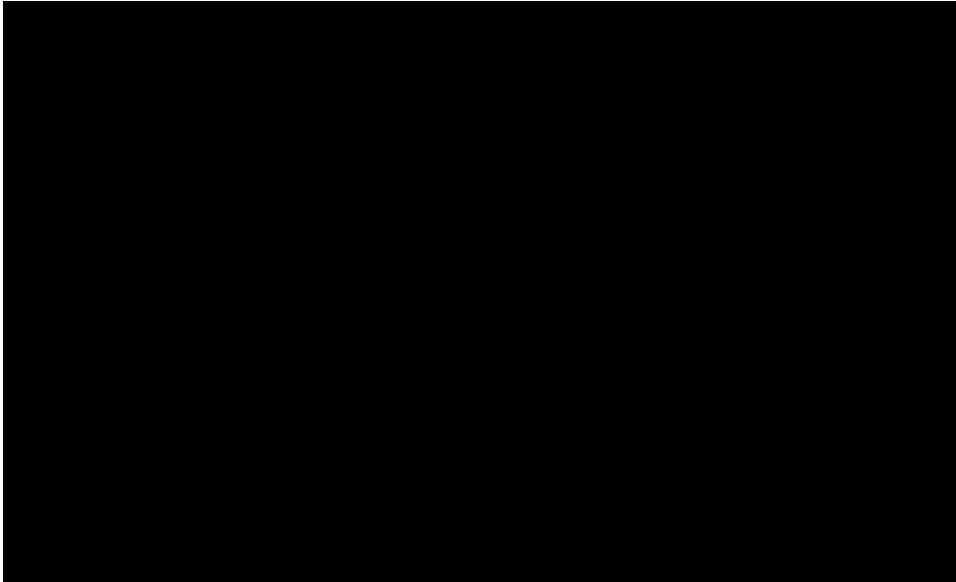
2.6 By clicking into the week and click “show detail,” it is possible to see the details for that respective week.



2.7 Then click, “View Equipment PMs.”

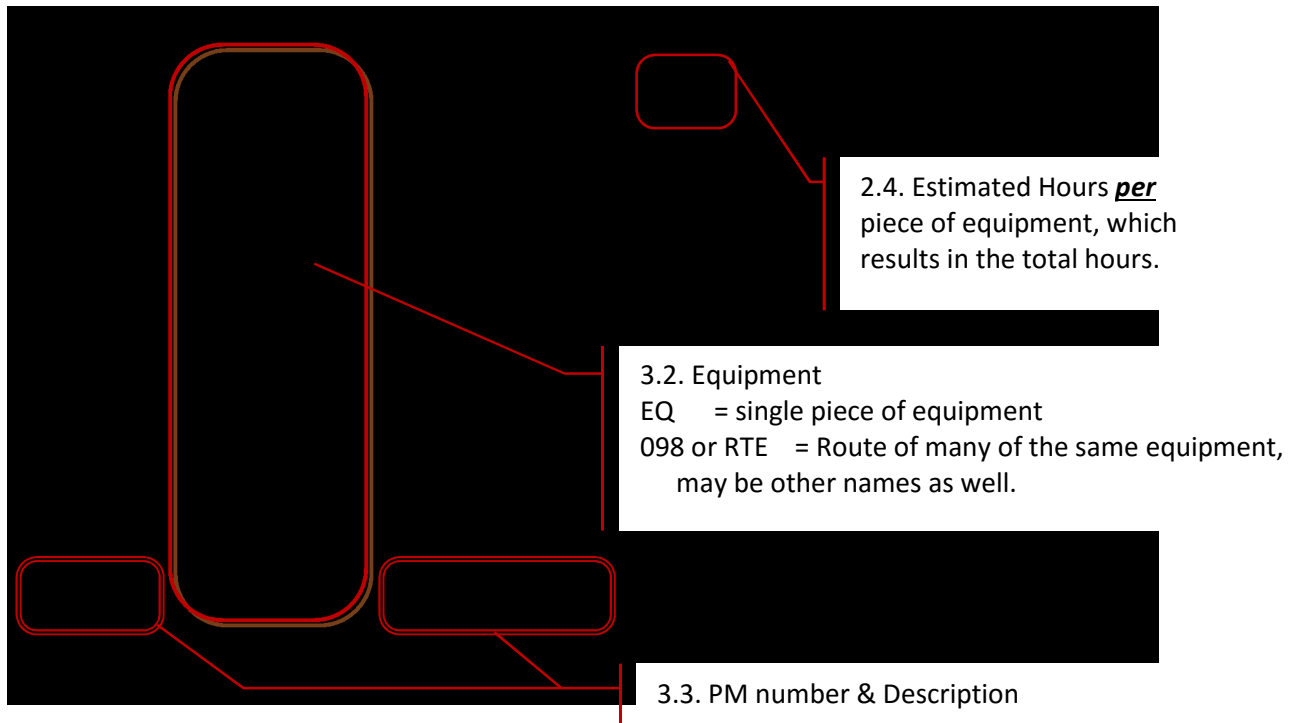


2.8 The Equipment PM form opens displaying the what is scheduled for that respective week. These are only what will be scheduled for that week; these are NOT open work orders, yet.



3. Equipment Form Details

3.1 There is a tremendous amount of detail to be gained for this screen. These details will be described by columns and how they relates to other information and items in FAMIS.



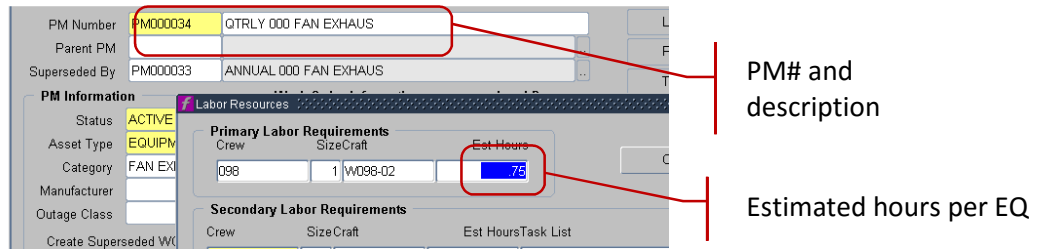
3.2 **Equipment:** This is the list of Equipment schedule for PMs. Items starting with **EQ** are a single piece of equipment. Items starting with a **098** are a Route. Routes are made of the same type of equipment in the same building.

3.3 **PM Number & Description:** The first and third columns are the task list that are setup in FAMIS. It is only the PMI number and its respective title. The EQ and/or Route have been setup to use this PM task list. (see pic below)

3.4 **Est Hrs:** This is the Estimated Hours **per** piece of equipment or **per** Route of Equipment.

- EQ of a single Supply Fan = .25 hours
- Route of 24 EQs of Supply Fans = .25 X 24 which is 6 hours total

Both the PM description and the estimated time comes from the setup of the PM instruction for Labor Resources. If the time estimate for a particular Route is not accurate, please contact your respective Planner/Schedulers to make that change the specific Route.



The following are examples of both the single equipment and a route of equipment(s).

Single Equipment: For EQ014334, it is estimated for this single EQ# to take 15 minutes (.25).

Route of Equipment: However, if there are **24** Supply Fans on a Route, example 098 MAI FS (Supply Fans in MAI), it is $\frac{3}{4}$ hour per fan for a total of **18** hours for the entire Route.

PM000006	098 MAI FS	QTRLY 000 FAN SUPPLY	.75	4	Month	18
PM000006	098 WCH FS	QTRLY 000 FAN SUPPLY	.75	4	Month	3
PM000229	EQ014334	WKLY 092 FLTR BANK	.25	1	Week	.25

Single Piece of Equipment

Route of Equipment

3.5 **Scroll Bar:** Notice the scroll bar are the bottom. There is more information to be seen on this view. Move the scroll to the other side.



Once the scroll bar is moved, the screen displays the last PM date and the **Next PM Date**.

Note: This **Next PM Date** can be changed in this screen (figure 1). It is the same as if making a change in the Equipment Route form (figure 2). Notice the date for Route Id, "098 GEB FS," both show a next PM date of Oct. 2, 2015.

PM Number	Equipment	Description	Est Hrs	Last PM	Next PM
PM000006	098 EPS FS	QTRLY 000 FAN SUPPLY	.75	THU MAY 28, 2015	FRI OCT 2, 2015
PM000006	098 GEB FS	QTRLY 000 FAN SUPPLY	.75	THU MAY 28, 2015	FRI OCT 2, 2015
PM000030	098 RLM FB	QTRLY 000 FLTR BANK	.5	WED MAY 27, 2015	FRI OCT 2, 2015
PM000034	098 RLM FE	QTRLY 000 FAN EXHAUS	.5	THU MAY 28, 2015	FRI OCT 2, 2015
PM000053	098 RLM FR	QTRLY 000 FAN RETURN	1	THU MAY 28, 2015	FRI OCT 2, 2015
PM000030	098 UNB FB	QTRLY 000 FLTR BANK	.5	TUE MAY 26, 2015	THU OCT 1, 2015
PM000034	098 WIN FE	QTRLY 000 FAN EXHAUS	.5	THU MAY 28, 2015	FRI OCT 2, 2015
PM000053	098 WIN FR	QTRLY 000 FAN RETURN	1	THU MAY 28, 2015	FRI OCT 2, 2015
PM000006	098 WIN FS	QTRLY 000 FAN SUPPLY	.75	THU MAY 28, 2015	FRI OCT 2, 2015
PM000434	BLDGHT01 FAC	SEMI 092 BLDG HEAT ROUTE	.25	FRI MAY 22, 2015	WED SEP 30, 2015
PM000221	EQ003675	QTRLY 092 FLTR BANK	.25	MON MAY 25, 2015	WED SEP 30, 2015
PM000221	EQ003676	QTRLY 092 FLTR BANK	.25	MON MAY 25, 2015	WED SEP 30, 2015
PM000269	EQ003677	QTRLY 092 FAN SUPPLY	.75	MON MAY 25, 2015	WED SEP 30, 2015
PM000269	EQ003678	QTRLY 092 FAN SUPPLY	.75	MON MAY 25, 2015	WED SEP 30, 2015

Figure 1: Planned Schedule Form

Route: 098 GEB FS | GEB: FAN SUPPLY (3X YEAR)

Site: UTM

Building: 0569

Equipment | Preventive Maintenance

Show: ACTIVE PMs

PM Number	Description	Next PM Date	Active	Actual
PM000006	QTRLY 000 FAN SUPPLY	FRI OCT 2, 2015	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

Figure 2: Equipment Route Form

4. Balancing the Work Load / Changing the Next Due Date.

There are multiple ways to see these dates; this document only describes it from the planned schedule perspective. 154.2 man-hours may seem too high when there is only 40.75 man-hours the week prior, it might be possible to move some work forwards or backwards to balance the work load. This section of the SOP will show how to change the dates on the following PMs:

- Show the planned schedule and changes
- Change dates on a Route of Equipment
- Change date on a single piece of Equipment

	Date	WO	Serv	Proj	PM	Avail Labor	+ / -
-	MON AUG 31, 2015	768	0		1004	0	-1772
1	MON SEP 7, 2015	0	0		33.25		-33.3
2	MON SEP 14, 2015	0	0		82.8		-82.8
3	MON SEP 21, 2015	0	0		40.75		-40.8
4	MON SEP 28, 2015	0	0		154.2		-154
5	MON OCT 5, 2015	0	0		61		-61
6	MON OCT 12, 2015	0	0		49		-49
7	MON OCT 19, 2015	0	0		57.35		-57.4
8	MON OCT 26, 2015	0	0		200		-200
9	MON NOV 2, 2015	0	0		179.3		-179
10	MON NOV 9, 2015	0	0		228		-228
11	MON NOV 16, 2015	0	0		57.2		-57.2
12	MON NOV 23, 2015	0	0		181.5		-182
+	AFTER	0	0		2146	0	-2146

4.1 Show your planned schedule.

4.1.1 Click into the week where the details need to be seen. In this case, we highlighted the 154.2.

4.1.2 Then click Show Detail, then click View Equip PMs.

	Date	WO	Serv	Proj	PM	Avail Labor	+ / -
-	MON AUG 31, 2015	768	0		1004	0	-1772
1	MON SEP 7, 2015	0	0		33.25		-33.3
2	MON SEP 14, 2015	0	0		82.8		-82.8
3	MON SEP 21, 2015	0	0		40.75		-40.8
4	MON SEP 28, 2015	0	0		154.2		-154
5	MON OCT 5, 2015	0	0		61		-61
6	MON OCT 12, 2015	0	0		49		-49
7	MON OCT 19, 2015	0	0		57.35		-57.4
8	MON OCT 26, 2015	0	0		200		-200
9	MON NOV 2, 2015	0	0		179.3		-179
10	MON NOV 9, 2015	0	0		228		-228
11	MON NOV 16, 2015	0	0		57.2		-57.2
12	MON NOV 23, 2015	0	0		181.5		-182
+	AFTER	0	0		2146	0	-2146

Up pops the following screen. The following PMs make up the 154.2 man-hours. It might be helpful to move a couple of Routes to a different week. The 3 routes outlined in RED, show 27 hours. Let's move the 10 hours on route 098 UNB FB to the previous week.

PM Number	Equipment	Description	Est Hrs	Interval	Total Hours	Last PM
PM000006	098 EPS FS	QTRLY 000 FAN SUPPLY	.75	Month	1.5	THU M
PM000006	098 GEB FS	QTRLY 000 FAN SUPPLY	.75	Month	2.25	THU M
PM000030	098 RLM FB	QTRLY 000 FLTR BANK	.5	Month	6.5	WED M
PM000034	098 RLM FE	QTRLY 000 FAN EXHAUS	.5	Month	8	THU M
PM000053	098 RLM FR	QTRLY 000 FAN RETURN	1	Month	9	THU M
PM000030	098 UNB FB	QTRLY 000 FLTR BANK	.5	Month	10	TUE M
PM000034	098 WIN FE	QTRLY 000 FAN EXHAUS	.5	Month	1	THU M
PM000053	098 WIN FR	QTRLY 000 FAN RETURN	1	Month	4	THU M
PM000006	098 WIN FS	QTRLY 000 FAN SUPPLY	.75	Month	6.75	THU M
PM000434	BLDGHT01 FAC	SEMI 092 BLDG HEAT ROUTE	.25	Month	10.5	FRI M
PM000221	EQ003675	QTRLY 092 FLTR BANK	.25	Month	.25	MON M
PM000221	EQ003676	QTRLY 092 FLTR BANK	.25	Month	.25	MON M
PM000269	EQ003677	QTRLY 092 FAN SUPPLY	.75	Month	.75	MON M
PM000269	EQ003678	QTRLY 092 FAN SUPPLY	.75	Month	.75	MON M

4.2 Change the date in the Route PM.

4.2.1 Right-mouse click on the Route ID. Scroll till you see the "Next PM date", then highlight the data and replace it with your new date. In the example, we are moving it to the week starting Monday Sep 21, 2015.

PM Number	Equipment	Description	Est Hrs	Last PM	Next PM
PM000006	098 EPS FS	QTRLY 000 FAN SUPPLY	.75	THU MAY 28, 2015	FRI OCT 2, 2015
PM000006	098 GEB FS	QTRLY 000 FAN SUPPLY	.75	THU MAY 28, 2015	FRI OCT 2, 2015
PM000030	098 RLM FB	QTRLY 000 FLTR BANK	.5	WED MAY 27, 2015	FRI OCT 2, 2015
PM000034	098 RLM FE	QTRLY 000 FAN EXHAUS	.5	THU MAY 28, 2015	FRI OCT 2, 2015
PM000053	098 RLM FR	QTRLY 000 FAN RETURN	1	THU MAY 28, 2015	FRI OCT 2, 2015
PM000030	098 UNB FB	QTRLY 000 FLTR BANK	.5	TUE MAY 26, 2015	THU OCT 1, 2015
PM000034	098 WIN FE	QTRLY 000 FAN EXHAUS	.5	THU MAY 28, 2015	FRI OCT 2, 2015
PM000053	098 WIN FR	QTRLY 000 FAN RETURN	1	THU MAY 28, 2015	FRI OCT 2, 2015
PM000006	098 WIN FS	QTRLY 000 FAN SUPPLY	.75	THU MAY 28, 2015	FRI OCT 2, 2015
PM000434	BLDGHT01 FAC	SEMI 092 BLDG HEAT ROUTE	.25	FRI MAY 22, 2015	WED SEP 30, 2015
PM000221	EQ003675	QTRLY 092 FLTR BANK	.25	MON MAY 25, 2015	WED SEP 30, 2015
PM000221	EQ003676	QTRLY 092 FLTR BANK	.25	MON MAY 25, 2015	WED SEP 30, 2015
PM000269	EQ003677	QTRLY 092 FAN SUPPLY	.75	MON MAY 25, 2015	WED SEP 30, 2015
PM000269	EQ003678	QTRLY 092 FAN SUPPLY	.75	MON MAY 25, 2015	WED SEP 30, 2015

4.2.2 Change the data to Sep 21, 2015

4.2.3 Click "Ok." The Planned Schedule will recalculate the times. Notice the 10 hours

Notice the hours have now changed to reflect the 10 hours changed from 154.2 to 144.2 and increased in the previous week.

	Date	WO	Serv	Proj	Planned PM	Avail Labor	+ / -
-	MON AUG 31, 2015	768	0		1004	0	-1772
1	MON SEP 7, 2015	0	0		33.25		-33.3
2	MON SEP 14, 2015	0	0		82.8		-82.8
3	MON SEP 21, 2015	0	0		50.75		-50.8
4	MON SEP 28, 2015	0	0		144.2		-144
5	MON OCT 5, 2015	0	0		61		-61
6	MON OCT 12, 2015	0	0		49		-49
7	MON OCT 19, 2015	0	0		57.35		-57.4
8	MON OCT 26, 2015	0	0		200		-200
9	MON NOV 2, 2015	0	0		179.3		-179
10	MON NOV 9, 2015	0	0		228		-228
11	MON NOV 16, 2015	0	0		57.2		-57.2
12	MON NOV 23, 2015	0	0		181.5		-182
+	AFTER	0	0		2146	0	-2146

5. Change date on a single piece of Equipment

Similarly, the date on a single piece of equipment can be changed. This process is not new but shown here to demonstrate the similarities of single/Route PMs and how they function the same way.

5.1 From the Planned schedule, click into the week and Show the details. (as shown in the sections above). From the list of equipment, select the single piece of Equipment. Recall the difference between the Route and single EQ.

5.1.1 Locate the Equipment record to change the date.

PM Number	Equipment	Description	Est Hrs PM	Next PM
PM000221	EQ003675	QTRLY 092 FLTR BANK	.25	MAY 25, 2015
PM000221	EQ003676	QTRLY 092 FLTR BANK	.25	MAY 25, 2015
PM000269	EQ003677	QTRLY 092 FAN SUPPLY	.75	MAY 25, 2015
PM000269	EQ003678	QTRLY 092 FAN SUPPLY	.75	MAY 25, 2015
HB6-092-A	EQ006132	ANNUAL-STEAM TRAP	4.5	SEP 29, 2014
SSP-093-S	EQ014070	SEMI-SUMP PUMP MECHANIK	.25	MAR 23, 2015
PM000348	EQ015363	QTRLY 092 FAN RETURN	.75	MAY 29, 2015
PM000221	EQ031284	QTRLY 092 FLTR BANK	.25	MAY 29, 2015
PM000221	EQ031285	QTRLY 092 FLTR BANK	.25	MAY 29, 2015
PM000106	EQ033163	ANNUAL 000 PREVENT BF (R)	1	SEP 8, 2014
PM000004	EQ033505	MTHLY 000 AC SPLIT	4.75	DEC 26, 2011
PM000348	EQ034132	QTRLY 092 FAN RETURN	.75	MAY 29, 2015
PM000336	EQ034484	QTRLY 092 FAN EXHAUS	.75	MAY 29, 2015
PM000336	EQ034817	QTRLY 092 FAN EXHAUS	.75	MAY 25, 2015

5.1.2 Scroll till you see the **NEXT PM date**.

5.1.3 Change the date to whatever week the PM needs to move to. In this case, we will move to the same **SEP 21, 2015**.

PM Number	Equipment	Description	Est Hrs	PM	Next PM
PM000221	EQ003675	QTRLY 092 FLTR BANK	.25	MAY 25, 2015	WED SEP 30, 2015
PM000221	EQ003676	QTRLY 092 FLTR BANK	.25	MAY 25, 2015	WED SEP 30, 2015
PM000269	EQ003677	QTRLY 092 FAN SUPPLY	.75	MAY 25, 2015	WED SEP 30, 2015
PM000269	EQ003678	QTRLY 092 FAN SUPPLY	.75	MAY 25, 2015	WED SEP 30, 2015
HB6-092-A	EQ006132	ANNUAL-STEAM TRAP	4.5	SEP 29, 2014	SEP 21, 2015
SSP-093-S	FQ014070	SFMI-SUMP PUMP MECHANIC	25	MAR 23, 2015	TUE SEP 29, 2015

5.1.4 Click “ok” to accept the change. FAMIS again recalculates the PLANNED SCHEDULE to show the following. The time for has further decrease by the 4.5 hours moved into the **SEP 21, 2015** week.

	Date	Planned			Avail		+ / -
		WO	Serv	Proj	PM	Labor	
-	MON AUG 31, 2015	768	0		1004	0	-1772
1	MON SEP 7, 2015	0	0		33.25		-33.3
2	MON SEP 14, 2015	0	0		82.8		-82.8
3	MON SEP 21, 2015	0	0		55.25		-55.3
4	MON SEP 28, 2015	0	0		139.7		-140
5	MON OCT 5, 2015	0	0		61		-61
6	MON OCT 12, 2015	0	0		49		-49
7	MON OCT 19, 2015	0	0		57.35		-57.4
8	MON OCT 26, 2015	0	0		200		-200
9	MON NOV 2, 2015	0	0		179.3		-179
10	MON NOV 9, 2015	0	0		228		-228
11	MON NOV 16, 2015	0	0		57.2		-57.2
12	MON NOV 23, 2015	0	0		181.5		-182
+	AFTER	0	0		2146	0	-2146

6. Multiple Date changes to a week

6.1 Multiple date changes can be made to a single week, by just making the changes to the **NEXT PM DATE**. Make the various date changes as per above and click ok. See the 4 changes in the example below:

PM Number	Equipment	Description	Est Hrs PM	Next PM
PM000006	098 EPS FS	QTRLY 000 FAN SUPPLY	.75	MAY 28, 2015
PM000006	098 GEB FS	QTRLY 000 FAN SUPPLY	.75	MAY 28, 2015
PM000030	098 RLM FB	QTRLY 000 FLTR BANK	.5	MAY 27, 2015
PM000034	098 RLM FE	QTRLY 000 FAN EXHAUS	.5	MAY 28, 2015
PM000053	098 RLM FR	QTRLY 000 FAN RETURN	1	MAY 28, 2015
PM000034	098 WIN FE	QTRLY 000 FAN EXHAUS	.5	MAY 28, 2015
PM000053	098 WIN FR	QTRLY 000 FAN RETURN	1	MAY 28, 2015
PM000006	098 WIN FS	QTRLY 000 FAN SUPPLY	.75	MAY 28, 2015
PM000434	BLDGHT01 FAC	SEMI 092 BLDG HEAT ROUTE	.25	MAY 22, 2015
PM000221	EQ003675	QTRLY 092 FLTR BANK	.25	MAY 25, 2015
PM000221	EQ003676	QTRLY 092 FLTR BANK	.25	MAY 25, 2015
PM000269	EQ003677	QTRLY 092 FAN SUPPLY	.75	MAY 25, 2015
PM000269	EQ003678	QTRLY 092 FAN SUPPLY	.75	MAY 25, 2015
SSP-093-S	EQ014070	SEMI-SUMP PUMP MECHANIK	.25	MAR 23, 2015

6.2 See the changes below:

Date	Planned			Avail		+ / -
	WO	Serv	Proj	PM	Labor	
- MON AUG 31, 2015	768	0		1004	0	-1772
1 MON SEP 7, 2015	0	0		33.25		-33.3
2 MON SEP 14, 2015	0	0		82.8		-82.8
3 MON SEP 21, 2015	0	0		71.25		-71.3
4 MON SEP 28, 2015	0	0		123.7		-124
5 MON OCT 5, 2015	0	0		61		-61
6 MON OCT 12, 2015	0	0		49		-49
7 MON OCT 19, 2015	0	0		57.35		-57.4
8 MON OCT 26, 2015	0	0		200		-200
9 MON NOV 2, 2015	0	0		179.3		-179
10 MON NOV 9, 2015	0	0		228		-228
11 MON NOV 16, 2015	0	0		57.2		-57.2
12 MON NOV 23, 2015	0	0		181.5		-182
+ AFTER	0	0		2146	0	-2146

7. Related desk instructions

All work instructions are located on the [FAMIS Desk Instructions](#).

8. Role Authorization

Daily Scheduling functions require the following roles:

- UT Crew Supv

Contact worqs@austin.utexas.edu or at 512-232-5020 for more information on this role.

9. Document Control

Filename	Title	Revision Date	Document Owner	Summary of Changes	Status
8-Using the Planned Schedule.docx	Using the Planned Schedule	08/27/2010	Darnell Mack	Original	Original Release
Planned_Schedule_08-24-2015.docx	Planned Schedule	8/24/2015	Darnell Mack	Updated for R2D2 update to FAMIS 8i in early 2015 which fixed the NEXT PM date change in the Planned Schedule form.	Released