

## Associate PM to Equipment

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### 1. Purpose

This desk instruction provides guidance and direction to Facilities Services personnel when associating equipment with a PM Task utilizing the Facilities Asset Management Information System (FAMIS).

This Desk Instruction documents the tasks required to associate (link) a preventive maintenance task instructions to a single piece of equipment.

## 2. Procedure

### 2.1 Equipment Form – Query the equipment

The screenshot shows the 'Equipment' form window. At the top, there are fields for 'Equipment' (EQ052257) and 'FAN EXHAUS-4: RM 1.204'. Below these are 'Parent' and 'Asset Class' fields. A red box highlights the top section of the form. Below the header, there are tabs for 'Equipment', 'Specifications', 'PMs', 'BOMs', 'Acquisition', 'Readings', and 'Alias'. The main content area is divided into several sections: 'Manufacturer' (Mfr No. FASCO, Model GEMINI 520, Serial No. 94028400), 'Location' (Site UTM, Building 0185, Floor 01, Room 1.204, Zone 2), 'Description' (Keyword FAN EXHAUS, Type HVAC SPEC, Equip Group HVAC, PM Group 092FANEXHA), and 'General Information' (Status / Condition ON-LINE). On the right side, there are buttons for 'Accounts...', 'WO History...', 'Vehicle Details...', 'Dates...', 'Audit...', 'Attributes...', and 'Lifecycle...'.

### 2.2 Associate PM with Equipment Record

#### 2.2.1 Equipment – Open the Equipment form, query the equipment.

This screenshot is identical to the one above, but the 'PMs' tab is selected in the top navigation bar. The rest of the form content remains the same.

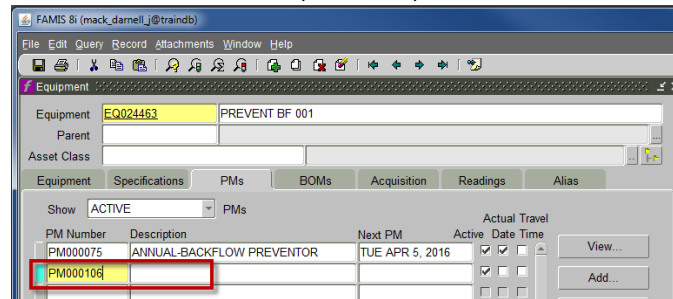
### 2.2.2 Select the PM Task

This can be done 3 different ways. All are explained below.

- Type in the PM number.
- Select from the PM Group
- Do a manual search

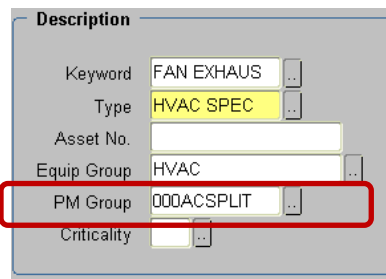
#### 2.2.2.1 Type in the PM number.

The easiest way to get to the PM number is working from another piece of equipment that you know has the correct PM task, query that EQ# and write down the PM number. At EQ#, PMs tab, insert the PM number at the open line.



Tab thru the line and the description will auto populate.

#### 2.2.2.2 (Optional) Select a PM Group<sup>1</sup> by searching the list of values. Click the snake eyes. It is not necessary to do this step if the PM is already known. This will put the grouped PM instructions on to the equipment record – this just serves as a starting point for PMs.

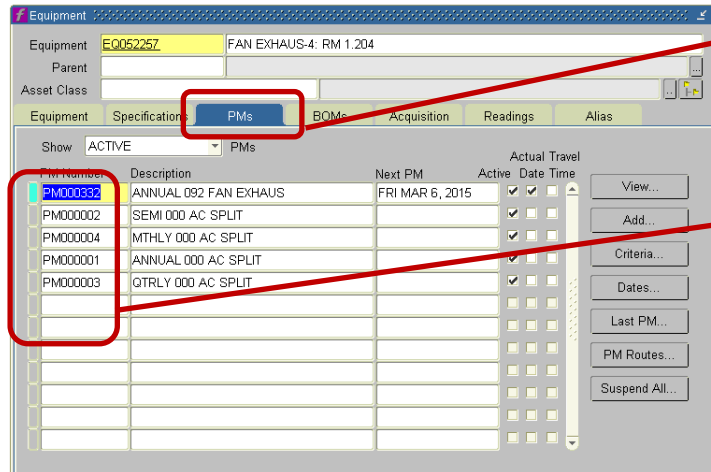


<sup>1</sup> **PM Group** (Defined in FAMIS Help) The PM Groups form is used to establish groupings of previously entered preventive maintenance requirements (see the Preventive Maintenance form). PM groups automate the process of setting up PMs for equipment.

For example, you may have ten air conditioners from the same manufacturer that all require the same preventive maintenance procedure. Furthermore, this particular air conditioner requires four entries in the PM form: one for monthly requirements, one for quarterly requirements, one for annual requirements and one for biannual requirements.

The PM Groups form enables you to group these four PMs and assign them to one PM group number. Then, when entering each air conditioner into the equipment form, you simply enter the PM group number and the four PMs will automatically be assigned to the air conditioner.

- Go to the PMs tab.



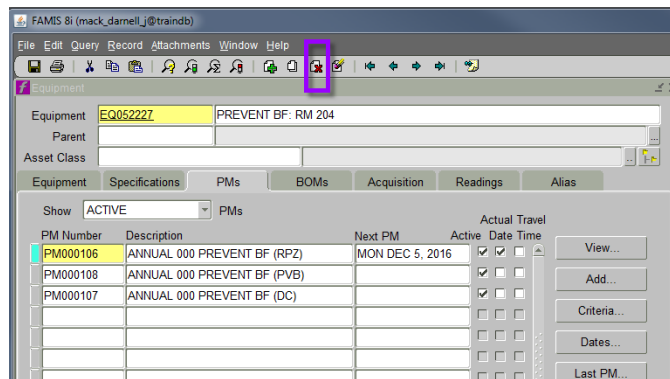
Click on PMs to open this tab.

PM Number Field

- Select the PM that you want for the equipment

Notice the PMs. The PMs were added as a result of selecting the PM Group. None will have a Next PM<sup>2</sup> date until you add a date. Until then, these PMs are not going to produce work orders.

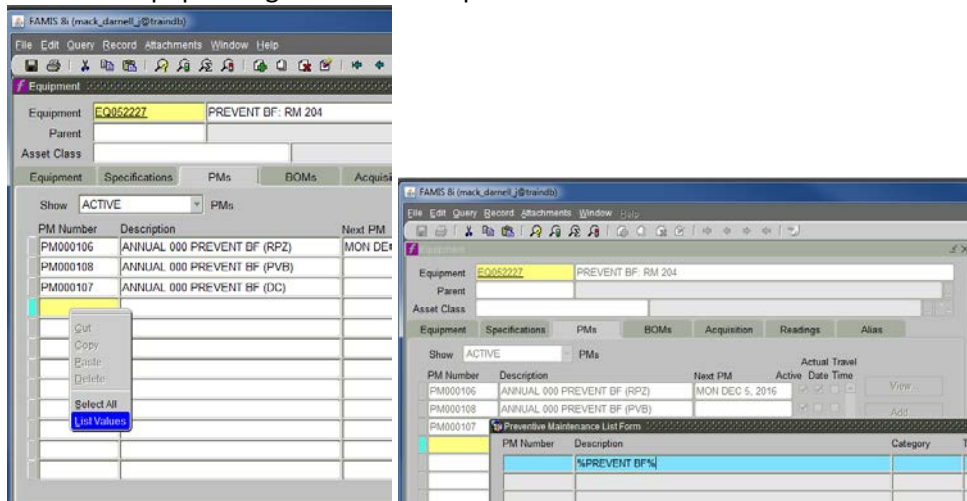
- Delete the remaining PMs, but clicking the red X, 



<sup>2</sup> **Next PM Field** (Defined in FAMIS Help) The date of the next PM. This date can be modified. Press [LIST OF VALUES] to choose a date from the Calendar window.

### 2.2.2.3 Do a manual search for a PM

- Select and right click in any open PM Number field.
- Right click in the field and select list of values.
- Use the LOV to Select List Values, query in a field using the Execute Query icon (Ctrl+F11). For example: to search for backflow, type in %PREVENT BF%, execute the query.
- Select the PM Number desired, hit OK to return to PMs tab.
- Tab to the next field. Tabbing into this field will result in this field populating with the description of the PM.

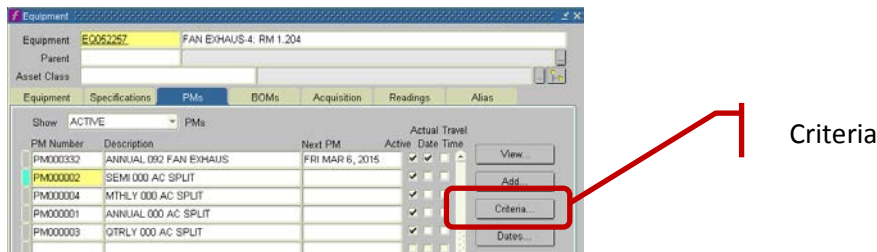
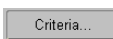


- Next PM – SKIP this field until Criteria section is complete.

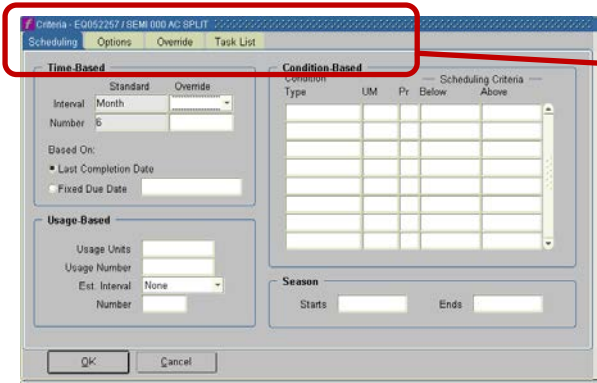
### 2.2.2.4 Save/Commit – Hit Tab and the Save icon (Ctrl+S). Repeat these steps for each additional PM desired.

## 2.3 Criteria Button on PM Tab

Place cursor in line with the desired PM, then click criteria button



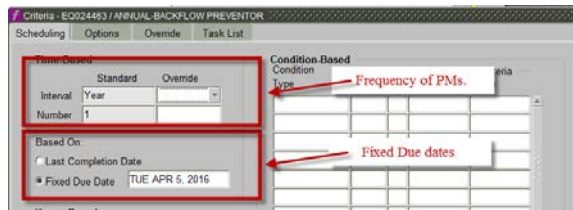
Screen will reflect the following:



There are 4 Tabs for entering Criteria for the PMs.

2.3.1 Verify Time-based PMs.

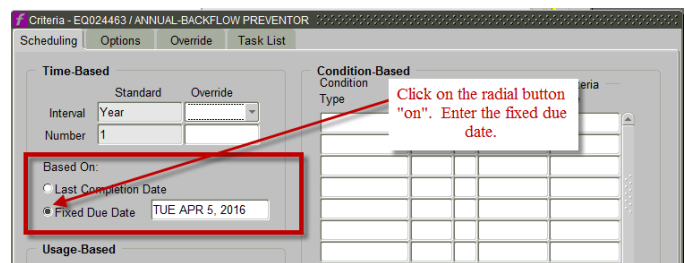
2.3.1.1 Check the Frequency interval and number to see if it is correct.



2.3.1.2 Click on Fixed Due date.

- Click the RADIAL BUTTON<sup>3</sup> for “fixed due date.”
- Insert a FIXED DUE DATE<sup>4</sup>.

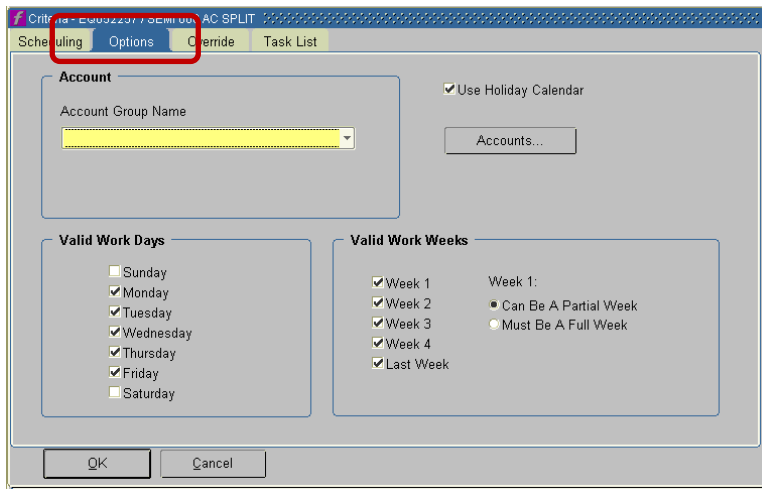
CAUTION: this is a critical criteria field to use. This fixed the PM date on a 3 month frequency. If this is based on the last completion date, the PM can easily get out of sequence. For a PM that should have been every 3 months or 4 times per year, the last completion date could allow it to “walk” or become only 2 times per year.



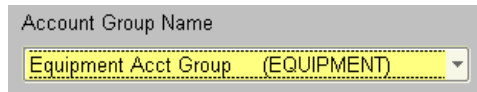
<sup>3</sup> **Fixed Due Date Radio Button:** If the next scheduled PM is based on a fixed due date, regardless of when the last PM was completed, check this item.

<sup>4</sup> **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.

### 2.3.2 Click on Options Tab.



2.3.2.1 Account Group Name – Select Equipment Acct Group (EQUIPMENT) from the Account Group Name pull down. The Equipment Acct Group shall always be selected. This ensures that the charges go to the equipment. This is setup when a new piece of equipment is assigned an EQ#. The account number’s are negotiated with the Facilities Services and often time the clients.



2.3.2.2 Valid work Days<sup>5</sup> / valid work weeks<sup>6</sup>. Typically the defaults are acceptable.

2.3.2.3 Hit OK to return to PMs tab.

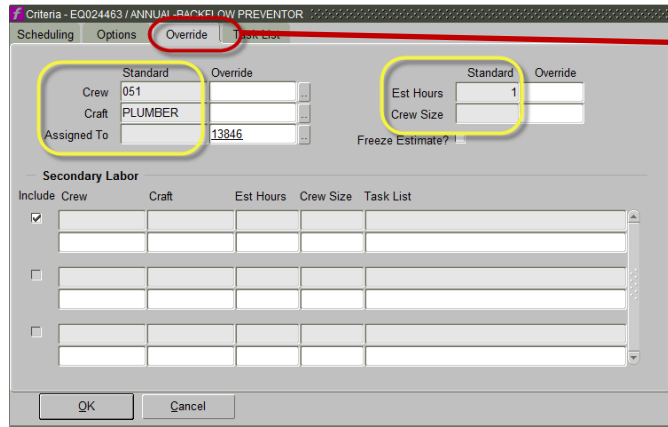
### 2.3.3 Override tab

2.3.3.1 Click the Override tab

Caution: It is advisable to limit the use of overrides, as this causes some issues with sorting and reporting. Data must be extracted from FAMIS for reporting. Although this is the correct use of the fields, FAMIS is limited in reporting of data, requiring our organization to manually create reports.

<sup>5</sup> **Valid Days** (as defined by FAMSI Help) The Valid Days window (invoked by the Valid Days button) lets you choose any combination of days, Monday through Friday, to define the workweek.

<sup>6</sup> **Selecting Valid Weeks for PM Scheduling** (as defined by FAMSI Help) The Valid Work Weeks window lets you choose which weeks to use for PM scheduling. Valid work weeks can be Week 1 through Week 4, or Last Week. For Week 1, check whether this week Can Be A Partial Week, or Must Be a Full Week. If PM Scheduling occurs in midweek, this determines whether the PM can be scheduled immediately or must wait until next week.



Click on Override to open this tab.

2.3.3.2 Verify the information as correct for your application. See above picture.

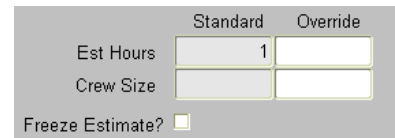
- Crew, Craft and Assigned to

In this case, the crew, craft and assigned to were added to the PM instruction. There are two ways to resolve this:

1. Type in the crew, craft and assigned to in the overrides fields for this equipment, **or**
2. Create a new PM instruction specified to the zone or building for this equipment (or type of equipment). See Procedure for creating PM Instruction.

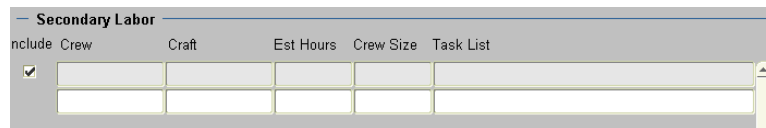
2.3.4 Time Estimates

This is the estimate time duration to perform the work on that single piece of equipment. This information is required for the Planned Schedule function to work in FAMIS



2.3.5 Secondary Labor

Enter the secondary labor as needed.

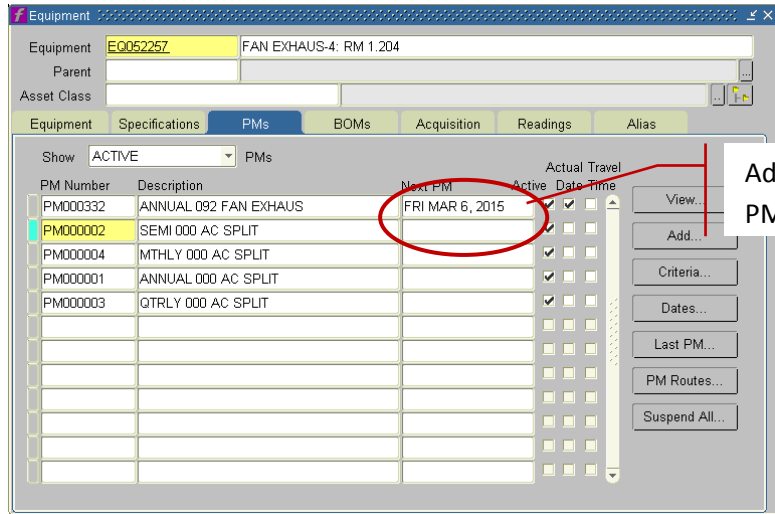


2.3.6 Click OK button to save work and return to the PMs screen.

2.4 Next PM date

2.4.1 Type in the "next PM date." This actually starts the PM. If there is no date, then PM will never start, it just hangs out there in limbo.

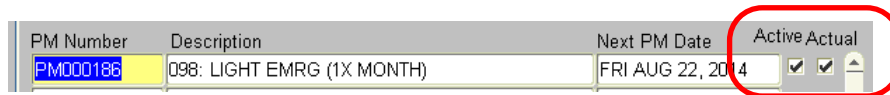




Add the date you want this PM to start.

**Caution:** Make sure it is a realistic start date at some point in future, tomorrow, next week, quarter, year, etc. A date in the past will result in multiple work orders based on that frequency. FAMIS attempts to catch up on the PMs. Example: if you miss type the year 2014 for year 0214 for a quarterly PM, then FAMIS will spawn multiple work orders from the year 0214. (Equation: #work orders = (2014-0214) x 3 = 5400 work orders)

2.4.2 The two radio buttons should be left at their defaults: Active<sup>7</sup> and Actual<sup>8</sup> Check boxes:



2.5 Delete un-used PMs.

All the PMs that are not used shall be deleted from the record.

2.5.1 Click into the line of the PM that is not longer needed.



2.5.2 Click on the delete button,

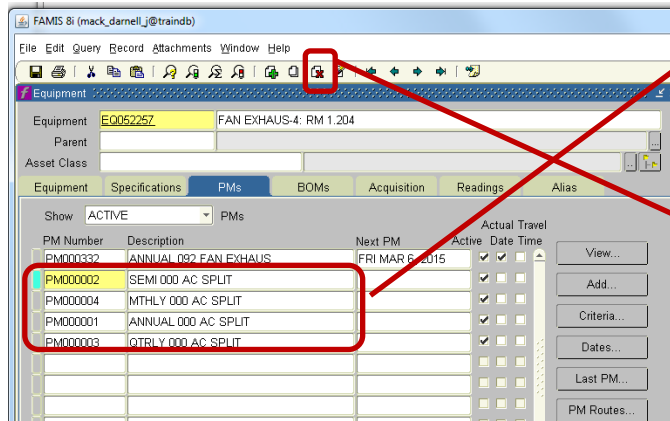
<sup>7</sup> **Active checkbox:** from FAMIS Help Manual.

This function enables the user to identify an active equipment/PM association even if the Next PM date field is blank. A blank Next PM field may indicate that the PM association has been suspended, or that the setup is in progress and the date has not been entered yet. A check in this box indicates that the PM listed to the left is active, regardless of whether or not there is a date in the Next PM field. The checkbox defaults to Active. When a user checks this box, the system will determine:

- if the equipment is active. If the equipment is not active, the system will display the following alert, "This equipment is inactive and won't be included in the PM Schedule. Are you sure you want to flag this record as 'Active?'"
- if the PM is active. If the PM is not active, the system will alert the user, "This PM Procedure is inactive and won't be included in the PM Schedule. Are you sure you want to flag this record as "Active?"

When a user unchecks the active box, the system will clear the Next PM date after confirmation by the user. Prior to scheduling Equipment PMs and Equipment PM Routes, the system will verify that the equipment and PM associated with it are both active.

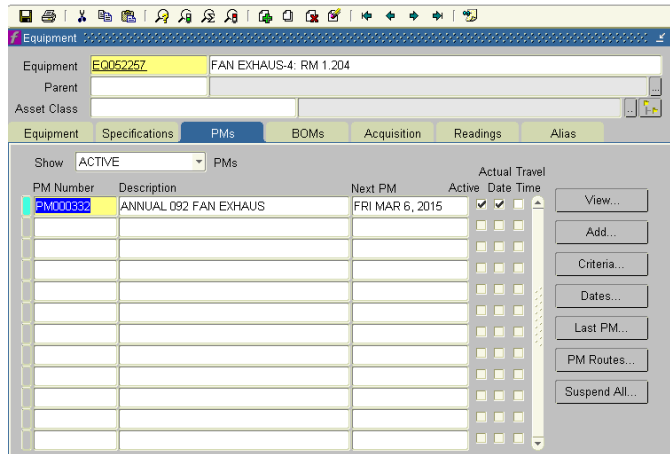
<sup>8</sup> **Actual Checkbox:** Unable to find any documentation in FAMIS about how this is used or defined.



2.6.1 PM to be deleted.

2.6.2 Delete button

2.5.3 Continue this process until all the PMs no longer needed are deleted. Your final screen should look similar to this.

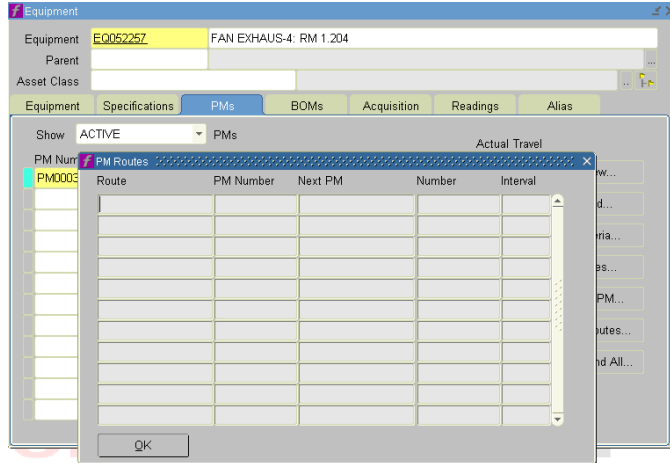


2.6 Verify PM Routes

It is recommended that you verify that the equipment is not already on a route for the same time of task. The intention is to eliminate the risk of multiple work orders for the same activity. It is possible to have PM on the Equipment AND have the equipment on a Route PM. This results in two work orders, that are not needed. You have to check the EQ's to make sure the equipment is not on a Route. If you don't, the equipment PM and the Route PM will kick out, resulting in duplicate PMs, double the man-hours, etc.

2.6.1 To verify, click on the PM Routes button.

2.6.2 The following screen will display. In this case, there are no Routes.



### 3. Related Desk Instruction and Links

- 3.1 Additional procedures related to equipment:
  - 3.1.1 [Create Procedure for Facility or Equipment PM](#)
  - 3.1.2 [Create \(Schedule\) PM Work Orders](#)
  - 3.1.3 [Make Routes in FAMIS](#)

### 4. Role Authorization

Adding equipment requires the role of “Equipment Coordinator” at a minimum. Contact your supervisor who will contact [worgs@austin.utexas.edu](mailto:worgs@austin.utexas.edu) to request role authorization.

- 4.1 The “Equipment Coordinator” role may add, edit, and retire equipment records
- 4.2 The “UT Crew Supervisor” role may edit and retire equipment records

### 5. Document Control

Title	Revision Date	Document Owner(s)	Summary of Changes	Status
FMM_AssociatePMandEQRecord.pdf	11/17/2012	TRecs	Original	Retired
AssociatePMandEQRecord_01-12-2016.docx	01/12/2016	FOM ET&S	Rewritten and updated	Published 01/12/2016

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