

Create/Modify Equipment PM

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1. Purpose

This process documents the method for modifying or viewing preventive maintenance (PM) records associated with equipment. This establishes the routine maintenance requirements.

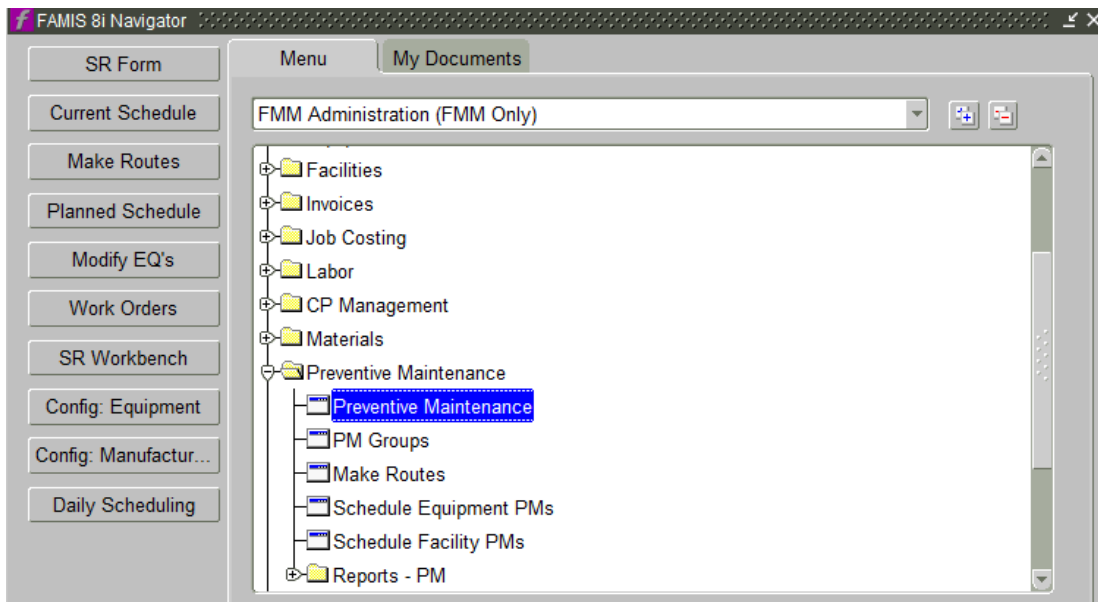
Other related procedures: Once the preventive maintenance records has been created, it can them be assigned to a particular piece of equipment or route of equipment. Finally, you will schedule your preventive maintenance using the Equipment PM Scheduling form. Those procedures are referenced at the end of this document.

2. Procedure:

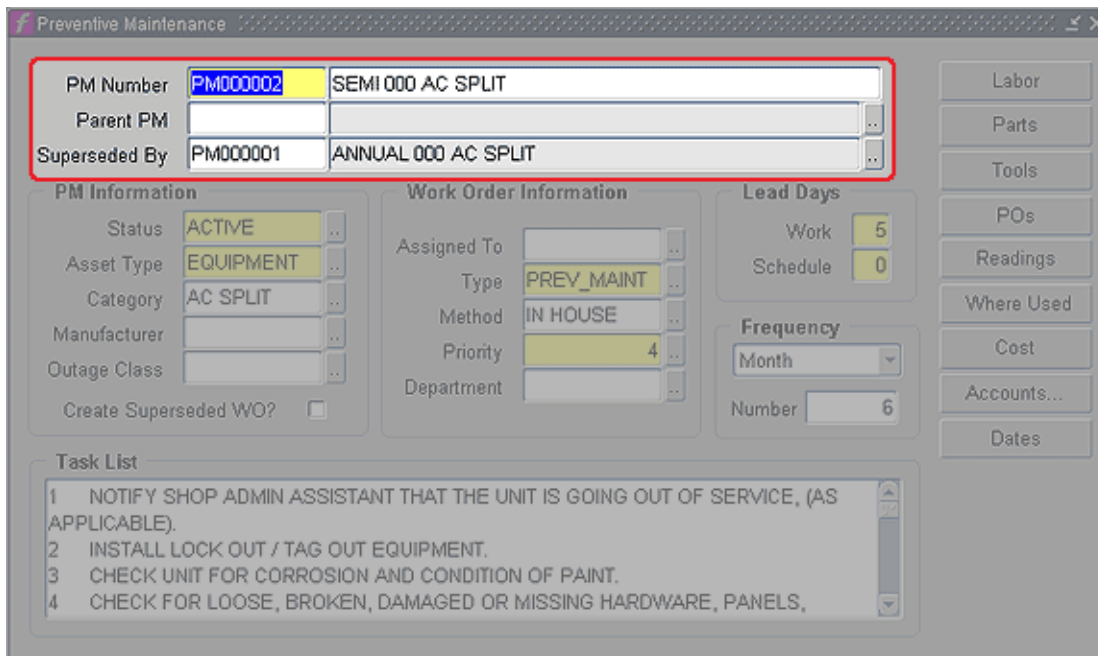
- 2.1 Prior to creating or editing the PM, determine the following
 - 2.1.1 Rough draft of the task list
 - 2.1.2 Understand the priorities and expected service level of the equipment
 - 2.1.3 Whether PM supersedes by another PM.
 - 2.1.4 Whether PM is to be crew specific or generic.

2.1.5 The frequency with which the PM will be scheduled.

2.2 Open the Preventive Maintenance Form (usually found in the Preventive Maintenance Folder).



2.3 Preventive Maintenance Form – Header Section



2.3.1 PM Number

Tab through this field to the (unlabeled) Description field; FAMIS will assign the PM number or, query for the PM that needs editing.

2.3.2 Description (Frequency, space, 3 digit Crew number, space, Keyword)

(Required) The format for the PM name is Frequency, space, 3 digit Crew number, space, Keyword.

2.3.2.1 Frequency normally is ANNUAL, SEMI, QTLRY, MTHLY or WKLY.

2.3.2.2 Use 000 for a generic crew; otherwise use the specified crew number.

Examples: ANNUAL 000 AC SPLIT SEMI 051 AC SPLIT
Frequency shop# keyword frequency shop# keyword

2.3.2.3 Parent PM – (not used)

2.3.2.4 Superseded By – If another PM supersedes this PM when PM work orders are scheduled for the same date, enter that PM Number in the Superseded By field. An example is a Quarterly PM that supersedes a Monthly PM; in this case, enter the Quarterly PM Number in the **Superseded By** field of the Monthly PM.

2.4 Preventive Maintenance Form – PM Information Section

The screenshot shows a software interface for creating a Preventive Maintenance (PM) form. The 'PM Information' section is highlighted with a red box and contains the following fields:

- Status: ACTIVE
- Asset Type: EQUIPMENT
- Category: AC SPLIT
- Manufacturer: (empty)
- Outage Class: (empty)
- Create Superseded WO?:

Other visible fields in the form include:

- PM Number: PM000002
- SEMI 000 AC SPLIT
- Parent PM: (empty)
- Superseded By: PM000001
- ANNUAL 000 AC SPLIT
- Work Order Information: Assigned To, Type (PREV_MAINT), Method (IN HOUSE), Priority (4), Department
- Lead Days: Work (5), Schedule (0)
- Frequency: Month, Number (6)
- Task List:
 - NOTIFY SHOP ADMIN ASSISTANT THAT THE UNIT IS GOING OUT OF SERVICE, (AS APPLICABLE).
 - INSTALL LOCK OUT / TAG OUT EQUIPMENT.
 - CHECK UNIT FOR CORROSION AND CONDITION OF PAINT.
 - CHECK FOR LOOSE, BROKEN, DAMAGED OR MISSING HARDWARE, PANELS,

2.4.1 Status field – (required)

- ACTIVE, or

- INACTIVE: if “inactive” status is selected, it will affect ALL equipment where this PM is used. There will be no notification when this happens. Use caution to research the effect of placing in inactive status. Click on “Where Used” button to see affected equipment.

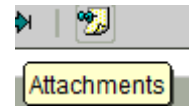
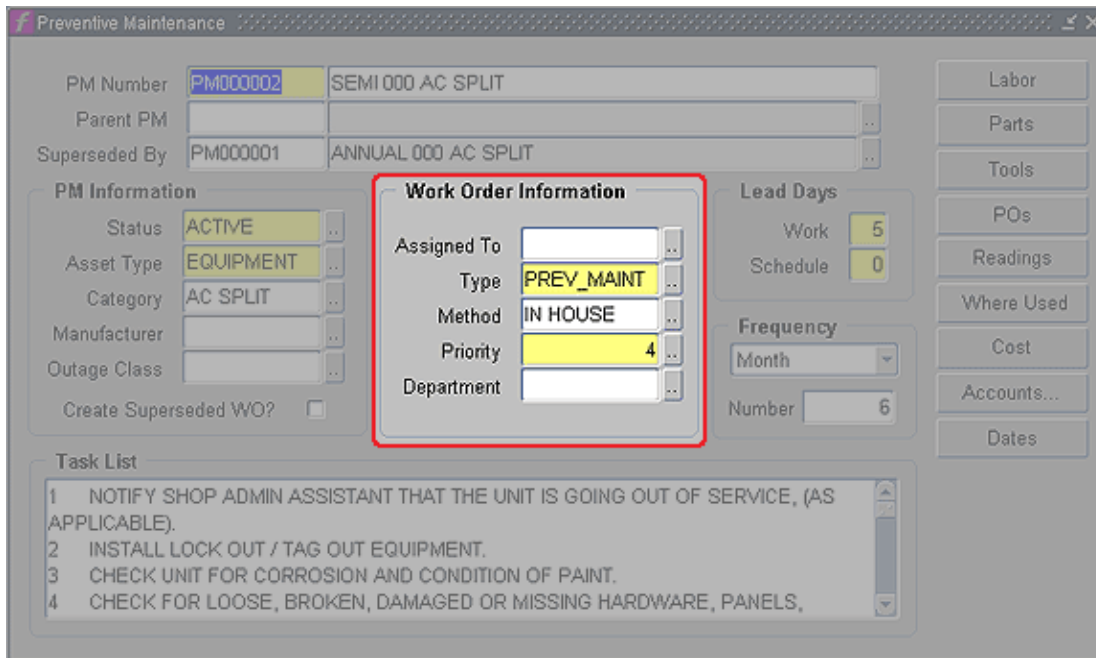


Figure 1
Attachment Button

Document why the procedure is “inactive” by selecting the attachment button.

- 2.4.2 Asset Type – (required) For Equipment PMs, type EQUIPMENT or select from LOV
- 2.4.3 Category – (required) Type/select the Keyword associated with the Equipment.
- 2.4.4 Manufacturer – (not used)
- 2.4.5 Outage Class – (not used)
- 2.4.6 Create Superseded WO? – (required) Ensure that the box is NOT checked.

2.5 Preventive Maintenance Form – Work Order Information Section



2.5.1 Assigned To– (optional)

This field is used to assign this PM to a specific technician. Enter the technician’s employee number in the field. This will apply to all equipment that uses this PM.

2.5.2 Type (required)

Type or select PREV_MAINT from the LOV.

2.5.3 Method – (required)

Type or select IN HOUSE from the LOV.

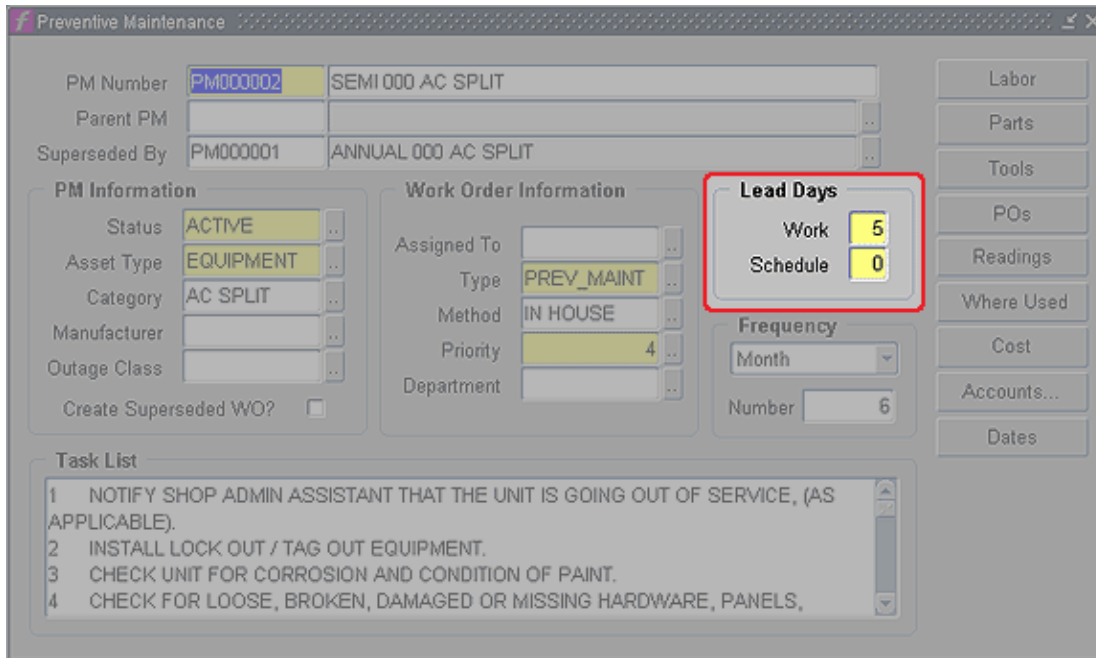
2.5.4 Priority – (required)

Type or select the appropriate number based on the following definitions.

| DESCRIPTION | COMMENTS |
|------------------------|----------------------------------|
| 1 - LIFE SAFETY / CODE | LIFE SAFETY OR CODE REQUIRED PMS |
| 2 - REQUIRED | MINIMUM MAINTENANCE |
| 3 - RECOMMENDED | RECOMMENDED MAINTENANCE |
| 4 - SHOULD | OPTIONAL MAINTENANCE ACTIVITIES |

2.5.5 Department – (not used)

2.6 Preventive Maintenance Form – Lead Days Section



The screenshot shows the 'Preventive Maintenance' form with the following details:

- PM Number:** PM000002 (SEMI 000 AC SPLIT)
- Parent PM:** (empty)
- Superseded By:** PM000001 (ANNUAL 000 AC SPLIT)
- PM Information:** Status: ACTIVE, Asset Type: EQUIPMENT, Category: AC SPLIT, Manufacturer: (empty), Outage Class: (empty), Create Superseded WO? (checkbox)
- Work Order Information:** Assigned To: (empty), Type: PREV_MAINT, Method: IN HOUSE, Priority: 4, Department: (empty)
- Lead Days (highlighted):** Work: 5, Schedule: 0
- Frequency:** Month, Number: 6
- Task List:**
 - 1 NOTIFY SHOP ADMIN ASSISTANT THAT THE UNIT IS GOING OUT OF SERVICE, (AS APPLICABLE).
 - 2 INSTALL LOCK OUT / TAG OUT EQUIPMENT.
 - 3 CHECK UNIT FOR CORROSION AND CONDITION OF PAINT.
 - 4 CHECK FOR LOOSE, BROKEN, DAMAGED OR MISSING HARDWARE, PANELS.

2.6.1 Lead work/schedule days (required)

Use these work and schedule days carefully, the typical days reference work well for most PMs. However, escalate for any question if these need to be changed. They greatly affect when PMs will come out if changes.

Example: It may be necessary for a PM to come out for a Boiler certification 30 days prior to the work being performed to give the supervisor time to schedule with contractor and internal technicians. Schedule days = 30 and work = 5 days respectively. Escalate to the FAMIS team for any questions on this application. It may be necessary to test the scheduling in the train database to make sure it performs as expected.

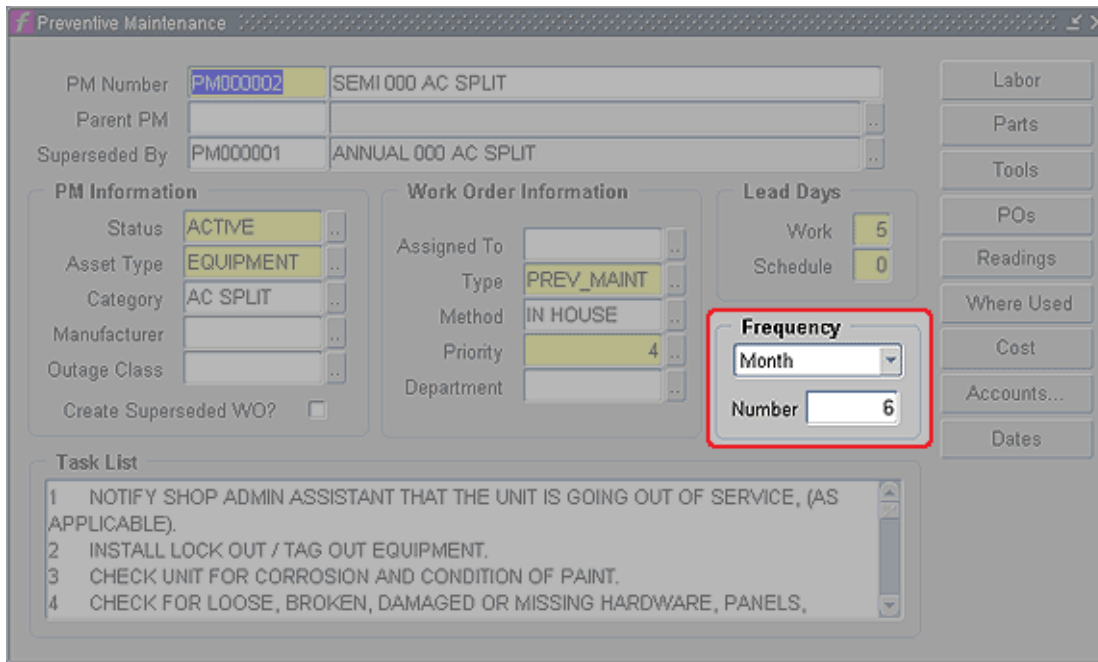
2.6.1.1 Work – (required)

In the [Work](#) field, enter the number of lead days before the PM is due for work to be performed. Typically, 5 days is appropriate.

2.6.1.2 Schedule – (required)

In the [Schedule](#) field, enter the number of lead days necessary before the start date of the PM for scheduling. Typically, 0 is appropriate.

2.7 Preventive Maintenance Form – Frequency Section



2.7.1 Frequency– (required)

Click on the drop-down arrow for a list of intervals (e.g., Week, Month, Year).

Caution: Do not use “none” or leave blank, this will result in the PM never coming out for the equipment. There will be no notice or obvious symptom of this.

2.7.2 Number– (required)

Enter number of intervals between scheduled PMs (e.g., 2 weeks, 6 months, 1 year, etc.)

Examples:

- An annual PM can be specified as Year x 1 or Month x 12 or Week x 52
- A semi-annual PM can be specified as Month x 6 or Week x 26
- A quarterly PM can be specified as Month x 3

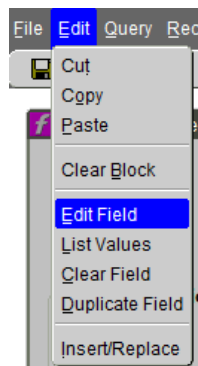
2.8 Preventive Maintenance Form – Task List Section

2.8.1 Task List– (required)

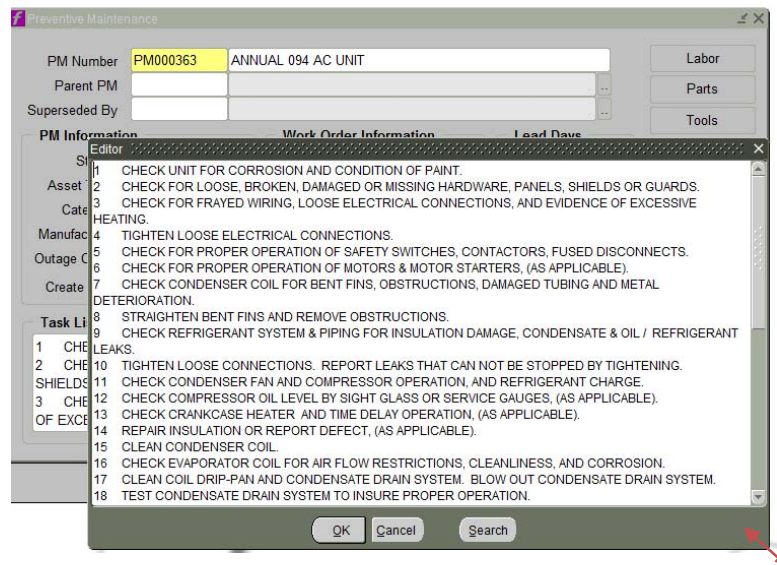
Type the list of tasks to be performed. Task lists may be copied and pasted from Word, Excel or other applications using Ctrl-V.

Quick tip: To expand the typing space to something more than 5 lines, with your *With your cursor in the task list*

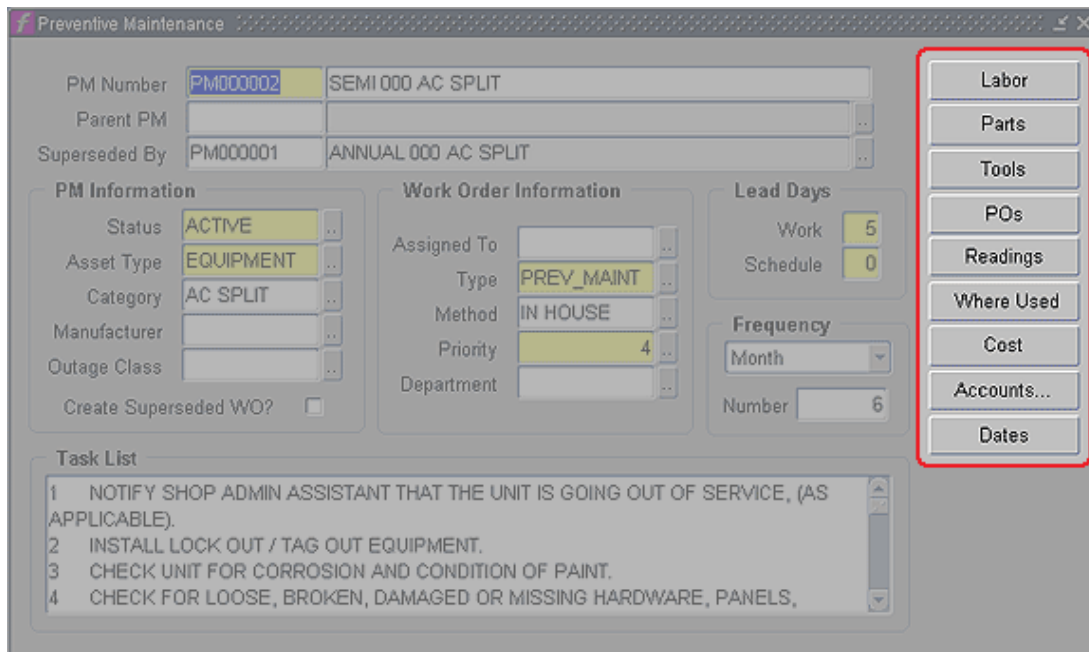
- Click on “edit”, then “edit field”



- This will bring up a large editor screen. This size can be adjusted by clicking into the lower right hand corner and pull (see red arrow)

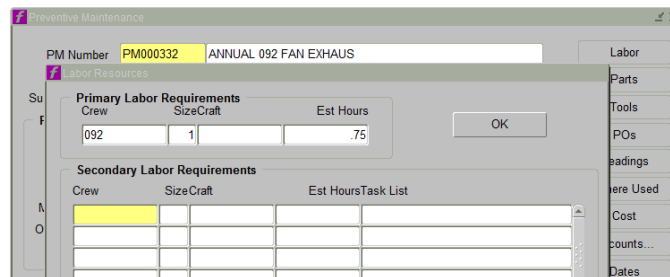


2.9 Preventive Maintenance Form – Buttons



2.9.1 Labor

Click on the upper button, “labor” , the following dialogue box comes up.



For a crew-specific PM, click the Labor button to enter the following information (disregard for generic PM):

2.9.1.1 Primary Labor Requirements:

Quick Tip: It is important to get this information into the PM as it allows the scheduling functions to work: planned and daily schedules.

- Crew: Type the 3-digit crew number, or click Ctrl+L to select from the list of values.
- Size: Enter Crew Size if applicable.
- Craft: Type the Craft Code or click Ctrl+L to select from the LOV if applicable.
- Est. Hours: Enter total estimated man hours required to perform work if known.

2.9.1.2 Secondary Labor Requirements

Fill this section out as above where more than one crew is required (do not complete this section for a single-crew PM).

Task List - Enter tasks required of secondary crew. Tip: This form seems small but the task list can be expanded by clicking "edit", "edit field". A larger form opens where you can see more info. Copy from Word, then paste using Ctrl-V into the Editor form.

2.9.1.3 Click OK to close the Labor form.

2.9.2 Parts, tools, PO's, Costs and Readings

These items are not used, only because we have not determined their use and capabilities with respect to our business.

2.9.3 Where used

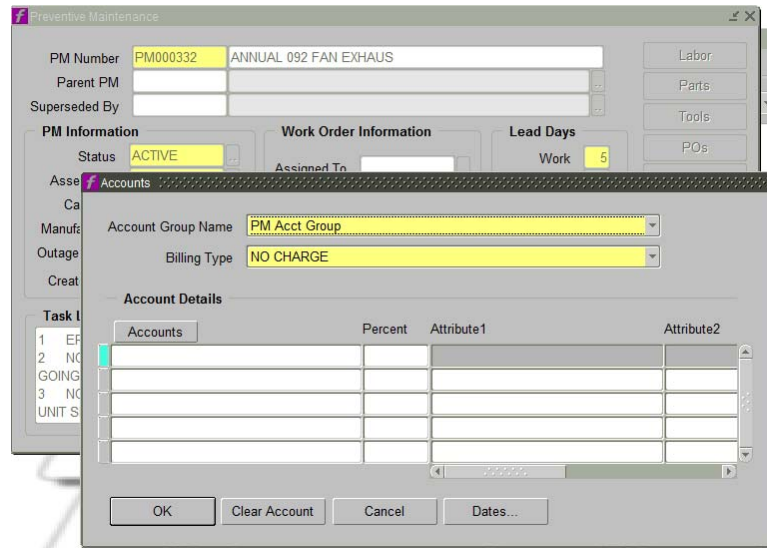
View list of equipment and routes that use this PM.

Quick Tip: This button is important to determining what changes will affect how many pieces of equipment and Routes of equipment.

2.10 Accounts

The charges for equipment go against the account numbers of the equipment record (EQ number). No account information should go on the PM Task List itself. That is why there is not account information on a PM.

Quick Tip: This only applies to Equipment PM’s; however, the process is very different for Facility PMs.



2.11 Dates¹ – View user names and dates when this record was created, modified, etc.

Quick Tip: if more information is needed for any additional changes, the info can be researched by emailing: ECS-SPECIAL WORQS (worqs@austin.utexas.edu) utilizing the query referenced below.

¹ Audit trail: Use the following SQL (or similar) to yield a report to show the change history of a PM. For pulling this type of data, contact worqs@austin.utexas.edu or at 512-232-5020.

```
SELECT audit_key1, audit_key2, audit_key3,
       audit_entity, audit_date, audit_user,
       audit_field, from_value, to_value
FROM famis_audit
WHERE audit_entity IN ('PM','EQUIP_PM')
AND audit_date > SYSDATE -1
ORDER BY audit_entity, audit_date DESC
```

3. Important Information

3.1 Related desk instructions

(See <https://wikis.utexas.edu/display/WORQS/FAMIS+Desk+Instructions>)

3.1.1 Associate PM and EQ Record

3.1.2 Enter or Modify Next PM Date

3.1.3 Creating Make Routes

3.1.4 Create (Schedule) PM Work Orders

3.1.5 Assigning Technician to Equipment PMs

3.2 Role Authorization

3.2.1 Creating PM's requires additional role authorizations such as Equipment Coordinator. Contact worqs@austin.utexas.edu or at 512-232-5020 for more information on this role.

4. Document Control

| Filename | Title | Revision Date | Document Owner | Summary of Changes | Status |
|----------------------------|---|---------------|--------------------------------|--|------------------------|
| FMM_PrevMaint_CreatePM.PDF | Create Procedure for Facility or Equipment PM | 11/17/2012 | TRecs | Original | Retired |
| Create PM 7-20-2015.docx | Create/Modify PM | 4/6/2015 | FOM Engineering, Tech, Support | Added priority, labor time, crew, tech assigned, etc. Removed Facility PM references. | Retired |
| Create PM 2-12-2016.docx | Create/Modify PM | 2/12/2016 | FOM Engineering, Tech, Support | Added pic to 2.10 and corrected numbering for 2.10 | Published 2/12/2016 |