

TRAINING GUIDE

# **PM Advanced**

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# Advanced PM Training

The *Work PM/Template* module allows you to create four different kinds of advanced PMs (Preventative Maintenance jobs): Grouped PMs, Grouped Asset PMs, Tightly Linked PMs, and Tightly Linked Group PMs. We'll discuss each of these four PM types in this workbook, as well as show in-depth examples to demonstrate how they're created, how they work, and how they interact with the *Work Orders* module.

Note: These Advanced PM topics rely on a basic understanding of the PM/Template system. For additional information on PM/Templates, please refer to the Basic PM Training workbook or the Lucity help guide.

### **Table of Contents**

Grouped PMs	2
Grouped Asset PMs	7
Tightly Linked PMs	
Tightly Linked Group PMs	

### Grouped PMs

The first type of advanced PM we will discuss is the Grouped PM. This is a type of scheduled PM. Remember, we covered scheduled PMs in the *Beginning PM Training* workbook. By selecting the **Scheduled PM** checkbox and the **Grouped PM** checkbox in the header, you gain access to the PM **Groups grid**. This grid will then be used to group assets together and set up PM schedules. You won't be using the **PM Asset** grid or Schedule fields on the PM/Template Form for this type of PM

The PM **Groups** grid provides you with the ability to create one PM record for multiple assets. You can then generate multiple work orders for separate assets on the same schedule using the same template. In other words, instead of creating five separate PM/Templates with the same category, problem, tasks, resources, checklist items, etc., you can create one PM/Template and then include all assets that need that type of routine work done. Then, you can create multiple work orders for those assets based on the single PM/Template you created.

Notes:	 	 

To help you create a PM for a group of assets, we'll go through a step-by-step example.

Let's assume you have a preventative maintenance task where you perform routine pump station inspections. You'd like to set up a bi-annual schedule for each pump station in your network, but would like to inspect the various pump stations in different months throughout the year. You'd also like to use the same tests, crews, and resources on each pump station inspection. In order to do this, you'll create one template for this PM that includes all of your pump stations, along with the tasks and resources needed to complete the inspections. Then, you can create individual PM schedules for each pump station, allowing you to generate separate work orders for each.

- 1. Create a new PM record.
  - Enter a unique PM/Template code-description in the header. We've titled this example, "Sewer Pump Station Inspections".
  - Select a related Category, Main Task, and Problem.
    - As you can see in the example below, we've chosen "Sewer Pump Station", "Pump Station Inspection", and "Routine Maintenance" as the Category, Main Task, and Problem, respectively.
  - Select the Scheduled PM checkbox. This distinguishes the PM record from a Work Template.
  - Select the Grouped PM checkbox. This allows you to create one PM for multiple assets. It also gives you access to the PM **Groups grid**.

PM/Template       PM/Template       X Scheduled PM       Inactive       Out-of-Service         PM Template       Grouped Assets       Atfected PM       Tightly Linked PM         VO       Send to WO Request Comment         Problem       SwerP738       Routine Maintenance       From         From       Grouped Assets       Comment       Grouped Assets       Grouped Assets         Main Task       SwerP738       Routine Maintenance       From       Grouped Assets       Grouped Assets         Supervisor       Grouped Assets       Grouped Assets       Grouped Assets       Grouped Assets         Supervisor       Grouped Assets       Grouped Assets       Grouped Assets       Grouped Assets         Supervisor       Grouped Assets       Grouped Assets       Grouped Assets       Grouped Assets         Assigned Grow       E       Grouped Assets       Grouped Assets       Grouped Assets       Grouped Assets         Bepartment       Grouped Assets       Grouped Assets       Grouped Assets       Grouped Assets       Grouped Assets	A A A A A A A A A A A A A A A A A A A	h 🖉 🧢 🖉 🖾 🔂 🔹	1 of 2327
PM/Template*   PM/Template*   PM1   Sever Pump Station Inspections     WO   PM Template   Grouped Assets   Arfected PM   Tightly Linked PM     Sever Pump Station Inspections     WO   Bend to WO Request Comment     USUP2   Pump Station Inspection   SwpP78   Routine Maintenance   Fromy   Supervisor   Otes   Ones   Otes   Cause   Supervisor   Otes   Cindy Wu   Assigned Crew   Ead Worker   Ead Worker   Ead Worker   Ead Worker   Ead Worker			ייז ייד ור ער אין
PM Template Grouped Assets Affected PM Tghtly Linked PM     VO   USUP2 Pump Stations   Problem   SWPP78   Routine Maintenance   Problem   SWP784   Sewer Pump Station Inspection   Supervisor   Cause   Supervisor   O165   Cindy Wu   Lead Worker   Lead Worker   Eason   Department	PM/Template * PM 1	PM/Template Text * Sewer Pump Station Inspections	WO Template X Scheduled PM X Grouped PM Inactive Out-of-Service
WO   Category*   USUP2   Pump Stations   SWP78   Routine Maintenance   Profity   Image: Supervisor   O165   Cindy Wu   Assigned Crew   Image: Supervisor   O165   Cindy Wu   Assigned Crew   Image: Supervisor   Image: Supervisor   O165   Cindy Wu   Image: Supervisor   Im			PM Template Grouped Assets Affected PM Tightly Linked PM
Seed to WO Request Comment USUP2 Pump Stations Problem SWPP78 Routine Maintenance Priority SWP784 Sewer Pump Station Inspection Cause Supervisor O165 Cindy Wu EAssigned Crew Cause Crew Comment Cause			WO
Problem   SWPP78   Priority     Image: SwperVisor   O165   Oindy Wu     Assigned Crew   Image: Supervisor   O165   Cindy Wu     Reason     Reason     Department	USUP2	Pump Stations	Send to WO Request Comment
SWPP78 Routine Maintenance   Priority   Image: SWP784   SWP784   Sewer Pump Station Inspection   Image: Supervisor   Outso   Outso   Outso   Image: Supervisor   Image: Outso   Supervisor   Image: Outso   Image: Outso   Supervisor   Image: Outso   Image:	Problem		
Priority   Main Task   SWPT84   Swer Pump Station Inspection     Cause   Cause   Supervisor   0165   Cindy Wu     Assigned Grew   Lead Worker     Reason     Reason     Department	SWPP78	Routine Maintenance	
Main Task   SWPT84   Swpr84   Swpr84   Supervisor   0165   Cindy Wu   E   Assigned Crew   E   Lead Worker   Reason   Reason   Department	Priority	-	
SWPT84 Sewer Pump Station Inspection   Supervisor   0165   Cindy Wu	Links West	=	
Cause Cause Supervisor O165 Cindy Wu E Assigned Crew Crew Comment Cause Crew Comment Crew Commen	SWPT84	Sewer Pump Station Inspection	
Supervisor   0165   Cindy Wu     Assigned Crew     Assigned Crew     Reason     Reason     Department	Cause		
Supervisor Crew Comment       0165     Cindy Wu       Assigned Crew       Lead Worker       Reason       Reason       Department			
Of65 Cindy Wu     Assigned Crew     Lead Worker     Lead Worker     Reason     Department	Supervisor		Crew Comment
Assigned Crew	0165	Cindy Wu	
Lead Worker	Assigned Crev	v	
Reason	Lead Worker		
Reason			
Department	Reason		
Department		=	
USU Sever Pump Station	Department	wer Pump Station	

2. Add all checklist items, tasks, and resources needed to complete the pump station inspections.

- 3. Add your Pump Station assets to the Grouped PM.
  - You will use the PM **Groups** grid to include assets. You will not use the PM Assets grid for this type of PM.
  - In our example, we will use the Toolkit Option Add Group(s) and Existing Pump Station Assets(s) to select the pump stations.
    - To load these assets, select the Toolkit Option Add Group(s) and Existing Pump Station Assets(s) within the PM Groups Grid.
    - From the Toolkit dialog, select the assets and click Ok.
    - The assets from that dialog will be added to the PM Grouped Assets grid. Each asset will be given its own unique PM Group ID.

PM Tig	htly Linked PMs (0) PM Locations	(0) PM Assets (0)	PM Tasks (0)	PM Checklists (0)	PM Exclusion Days (0)	PM Tracking (0)	Work Orders (0)	PM Groups (0)
	- I 🗐 • 🖬	]						
	Add Group(s) and Existing Asse	t(s)						
	Add Group(s) and Existing Pum	p Stations Asset(s)						
	Add New Group and First Asset		-					
1	Delete Group(s) and All Their As	ssets   Selected Record	rd(s)					
Add	Group(s) and Existing	Pump Stations	Asset(s)					
Se								
	low would you like the new assets	to be added?						
	Add all new assets to a new gro	up						
L	Oreate individual groups for all	new assets						
	Add all new assets to an existin	g group						
Т	'his PM Doesn't allow multiple assets	on groups so those optio	ns have been di	sabled.				
N	lew Group Start							
	Fill in missing groups 💿 Start	from last group						
F	Please select where the individual are	ups should start						
-								
E	Existing Groups			Start New Group	>			
	Group Number			New Group 1	lumber			
Pic								
Pic								
Pic	Select an Asset		=	-				
-	Asset	Asset Description						
36								
SV								
INI	Cancel						OK	
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tumber         S           1543030         Tr           Mastin         M           2501         M           2803         E           2904         B           2905         G	tation Name omahawk Creek lastin Street Pump Station lidway Pump Station vansfown Pump Station urabic Hill Pump Station krove Street Pump Station	Station Type Station with Force Main	General Location			
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PS04 B PS05 G	uffaio Hill Pump Station irove Street Pump Station					
PS05 G	rove Street Pump Station					
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-	<b>P</b>	PM 1	Sewer Pump St	ation Inspections				USU	P2	Pum	p Stations			SWPT84	Sewe	er Pump Stati	on I
	PM 1	Fightly Linked PMs (0)	PM Locations (0) F	PM Assets (0) PM Tasks	(1) PI	M Checklists (3)	PM Exclusion Days	(0)	PM Tracking	(0)	Work Orders (0)	PM Groups (3)	PM A	Asset Filter (0)	Associate	ed WOs (0)	
		🚘 🎩 🗐	• <b>S</b>													$\mathbb{Q}$	3
		Group Number	System ID 1	Description	T												
	÷	1	PS01	Midway Pump Station													
	÷	2	PS03	Evanstown Pump Station													
	÷	3	PS04	Buffalo Hill Pump Station													

#### Notes:\_\_\_


- 4. Schedule your PMs.
  - You will use the **Grouped PM Scheduling** grid to schedule your Grouped PM. You will not use the Schedule Fields on the PM/Template form for this type of PM.
  - Select the plus icon 📫 beside the asset for which you would like to set up a PM schedule.
    - The Grouped PM Schedules grid only displays schedules for the highlighted assets.
  - Select the Toolkit in the Grouped PM Schedules grid and select Add New Schedule.

Grouped PM Scheduling (0)	PM Groupe	d Assets (1)	PM Grouped PM Ex	clusion Days (0)	PM Grouped PM	l Tigh	tly Linked PMs (0)	
	-	<b>1</b>	ê 🗵					
Grup Add New Sch	edule				Vext Start Date	T	Last End Date	Ŧ

- Determine whether you would like to use a fixed or floating schedule:
  - A **Fixed Schedule** generates a work order based on the Next Start Date. This type of PM will generate at a fixed interval regardless of when the last job was completed. For example, if you have a weekly work order that generates on a Monday, the next new work order will be generated the following Monday even if the last job wasn't finished until Thursday.
  - A **Floating Schedule** generates a work order based on the Last End Date. In the same example as above, if a work order was generated on Monday for your weekly task, but you didn't finish the wok order until Thursday, your next work order will not generate until the following Thursday.

- In the example below, we have set up a fixed schedule based on the last start date of the work order (using the PM Last Start Date field).
- Next, select the interval for the next PM to be generated. In other words, select the time lapse between each work order generation.
  - We have set a 6 month interval for work order generation.
- Click in the Next Start Date field and the date will automatically be populated based on the start date and the selected interval.
- Repeat this scheduling process for each pump station asset in your Grouped Assets grid.

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Last Start Date 9/6/2016	Start Date Interval	Start Inter	val Code Months	=	Next Start Date	Days Ahead
Last End Date	End Date Interval	End Interv	al Code	_	Next End Date	
Previous Odometer	Odometer Interval				Next Odometer	Odometer Ahead
Previous Hourmeter	Hourmeter Interval				Next Hourmeter	Hourmeter Ahead
Previous Other	Other Interval				Next Other	Other Ahead
Status		Work Orde	er #		Initiated Date	

• Save the record, if the date is behind, the work order will generate and set the New last start date equal to the Next Start Date

-	6	PM 1	Sewer Pump Statio	n Inspections		US	UP2 Pur	np Stations	
	PMT	Fightly Linked PMs (0) PM	I Locations (0) PM	Assets (0) PM Tasks	(1) PM Checklists (3)	PM Exclusion Days (0)	PM Tracking (0)	Work Orders (0)	PM Groups (3) PN
		🖬 🖪 🗐	•			/			
		Group Number	System ID 1 🛛 🍸 🛛	Description	T				
	-	1 P	S01 Mi	dway Pump Station					
		Grouped PM Scheduling	(1) PM Grouped As	sets (1) PM Grouped	d PM Exclusion Days (0)	PM Grouped PM Tightly L	inked PMs (0)		
		D =	5 🗊 🔹	🛅 🚧 🔟					
		Group ID	Work Order #	Status Text 🛛 🍸 L	Last Start Date	Next Start Date	ist End Date	Next End Date	Previous Odome
		1	18-000235	WO Generated	03/06/2017	09/06/2017			
-	6	PM 1	Sewer Pump Stat	ion Inspections			USUP2	Pump Stations	
	PM	Tightly Linked PMs (0)	M Locations (0) PN	1 Assets (0) PM Tasl	ks (1) PM Checklists (	3) PM Exclusion Days (	)) PM Tracking (	0) Work Orders (0)	PM Groups (3)
		🚘 🔳 🗊	•						
		Group Number	System ID 1	Description	T				
	÷	1	PS01 I	Midway Pump Station					
		2	PS03 E	Evanstown Pump Statio	n				
		Grouped PM Scheduling	(1) PM Grouped A	Assets (1) PM Group	ed PM Exclusion Days (0	) PM Grouped PM Tight	ly Linked PMs (0)		
			· • 🗊 🔁	🎦 純 🔝					
		Group ID	Work Order #	Status Text	Last Start Date	Next Start Date	Last End Date	Next End Date	Previous Od
		2	18-000236	WO Generated	09/06/2017	03/06/2018			

- 5. View the generated work order.
  - Select the WO in the Grid, then Click on the Relationship Icon Scheduling Grid. You will see the new work order listed.



• Click on the Work Orders(). The Work Orders module will open directly to that record.



• On the new work order, you will see the Category, Problem, and Main Task that you chose in the PM. Additionally, the pump station asset, checklist items, tasks, and resources will be included in the new work order. As you can see below, the single pump station asset with this PM schedule appears in the Asset Grid of the Work Order View.

	Work Order #	Category	Problem	Main Task	Ť	Priority T	Reason	T	Lead Worker	T	Status	Ť	Status Da	ate 🝸	Start Date	T	Enc
1		Pump Stations		Sewer Pump Station In	spection						New Work					6/2017	
Loca	tions (0) Assets (1	Tasks (1) Checl	klist (3) WO Comments	(0) Tracking (7) P	M/Work Templates	(1)											
	<b>b</b>	•	1 🛃 🗐	· 😫 😰 🖡	6										Q		
	Sequence T	Asset Type	T Category T Co	ompletion Date	Asset ID	Desc 1		T	Desc 2	Odom	ieter 🛛 🍸	Hourmete	er 🝸	Other Met	er 🝸	Descripti	ion
1	2	Sewer Pump Station	Pump Stations		PS03	Evanstown Pur	mp Station									Evansto	wn F
		Work Order #           18-000236           Locations (0)         Assets (1)           Sequence         •           2         2	Work Order #     Category       18-000236     Pump Stations       Locations (0)     Assets (1)     Tasks (1)       Sequence     Asset Type       2     Sewer Pump Station	Work Order #     Category     Problem       18-000236     Pump Stations     Routine Maintenance       Locations (0)     Assets (1)     Tasks (1)     Checklist (3)     WO Comments       Sequence     Asset Type     Category     Category     Category     Category       2     Sewer Pump Station     Pump Stations	Work Order #       Category       Problem       Main Task         18-000236       Pump Stations       Routine Maintenance       Sewer Pump Station In         Locations (0)       Assets (1)       Tasks (1)       Checklist (3)       WO Comments (0)       Tracking (7)       P         Image: Sequence       Asset Type       Image: Category       Category       Completion Date       Image: Category       Completion Date       Image: Category       Completion Date       Image: Category       Image: Ca	Work Order #       Category       Problem       Main Task         18-000236       Pump Stations       Routine Maintenance       Sewer Pump Station Inspection         Locations (0)       Assets (1)       Tasks (1)       Checklist (3)       WO Comments (0)       Tracking (7)       PMWork Templates         Image: Sequence       Asset Type       Category       Category       Completion Date       Asset ID       Y         Image: Sequence       Asset Type       Category       Completion Date       PS03	Work Order #       Category       Problem       Main Task       Priority         18-000236       Pump Stations       Routine Maintenance       Sewer Pump Station Inspection         Locations (t)       Assets (t)       Tasks (t)       Checklist (3)       WO Comments (t)       Tracking (7)       PM/Work Templates (t)         Image: Sequence       Asset Type       Category       Completion Date       Asset ID       Desc 1         Image: Sequence       Sequence       Pump Station       Pump Stations       Pump Stations       Pump Stations	Work Order #       Category       Problem       Main Task       Priority       Reason         18-000226       Pump Stations       Routine Maintenance       Sever Pump Station Inspection       Image: Completen Station Inspection       Image: Completen Station Inspection         Locations (0)       Assets (1)       Tasks (1)       Checklist (3)       WO Comments (0)       Tracking (7)       PM/Work Templates (1)         Image: Completion Station       Image: Completion Date       Image: Completion Date       Image: Completion Date       Image: Completion Date       Asset ID       Desc 1         Image: Completion Date       2       Sever Pump Station       Pump Stations       Pump Station       Pump Station	Work Order #       Category       Problem       Main Task       Priority       Reason         18-000236       Pump Stations       Routine Maintenance       Sever Pump Station Inspection       Priority       Reason         Locations (0)       Assets (1)       Tasks (1)       Checklist (3)       WO Comments (0)       Tracking (7)       PMWork Templates (1)         Image: Sequence       Asset Type       Category       Completion Date       Asset ID       Desc 1       Y         Image: Sequence       Asset Type       Category       Completion Date       PS03       Evanstown Pump Station	Work Order #       Category       Problem       Main Task       Priority       Reason       Lead Worker         18-000236       Pump Stations       Routine Maintenance       Sewer Pump Station Inspection       Image: Complete Station S	Work Order #       Category       Problem       Main Task       Priority       Reason       Lead Worker         18-000226       Pump Stations       Routine Maintenance       Sewer Pump Station Inspection       Lead Worker       Tasks (1)       Checklist (3)       WO Comments (0)       Tracking (7)       PMWork Templates (1)         Locations (0)       Assets (1)       Tasks (1)       Checklist (3)       WO Comments (0)       Tracking (7)       PMWork Templates (1)         Sequence       Asset Type       Category       Completion Date       Asset ID       Desc 1       Desc 2       Odor         2       Sewer Pump Station       Pump Stations       Pump Stations       PS03       Evanstown Pump Station	Work Order #       Category       Problem       Main Task       Priority       Reason       Lead Worker       Status         18-000226       Pump Stations       Routine Maintenance       Sever Pump Station Inspection       New Work         Locations (0)       Assets (1)       Tasks (1)       Checklist (3)       WO Comments (0)       Tracking (7)       PMWork Templates (1)         Image: Sequence       Asset Type       Category       Completion Date       Asset ID       Desc 1       Desc 2       Codometer         Image: Sequence       Sequence       Pump Station       Pump Stations       Pump Station       Pump Stations       Completion Date       PS03       Evanstown Pump Station	Work Order #       Category       Problem       Main Task       Priority       Reason       Lead Worker       Status       Y         18-000226       Pump Stations       Routine Maintenance       Sever Pump Station Inspection       New Work Order       New Work Order         Locations (0)       Assets (1)       Tasks (1)       Checklist (3)       WO Comments (0)       Tracking (7)       PMWork Templates (1)         Image: Sequence       Asset Type       Category       Completion Date       Asset ID       Desc 1       Desc 2       Odometer       Hourmetr         2       Sewer Pump Station       Pump Stations       Pump Stations       PS03       Evanstown Pump Station       Pump Station	Work Order #       Category       Problem       Main Task       Priority       Reason       Lead Worker       Status       Status	Work Order #       Category       Problem       Main Task       Priority       Reason       Lead Worker       Status       Other       Thousand       Other       Thousand       Other       Thousand       Other       Thousand       Other       Thousand       Other       Thousand       Th	Work Order #       Category       Problem       Main Task       Priority       Reason       Lead Worker       Status       Status	Work Order #       Category       Problem       Main Task       Priority       Reason       Lead Worker       Status       Status       Status       Status       Status       Date       Status       Status       Date       Status       Status       Date       Status       Status       Status       Date       Status       Status       Status       Date       Status       Status       Date       Status       Status       Date       Status       Status       Date       Status       Status

6. Close the work order by entering an End Date and setting the Status to "999-Complete". This will enable the PM to generate another work order at the next six-month interval.

### Grouped Asset PMs

The second type of advanced PM is the **Grouped Asset PM**. This feature allows you to create one PM/Template for multiple assets, and then create smaller groups of those assets each with their own group PM schedule. You can then generate one work order for each group of assets using the same PM/Template. In other words, instead of creating three separate templates with the same category, problem, task, resources, checklist items, etc., you can create one template and then include all assets that need that type of routine work done at the same time. Then, you can group those assets based on when work needs to be done and create a single work order for each group of assets based on the single template you created.

within the Grouped PM

By selecting the **Scheduled PM** checkbox, the **Grouped PM** checkbox, and the **Grouped Assets** checkbox, you gain access to this feature. Grouped Asset PMs use the **Grouped PMs** Grid. As before, this Grid is used to add assets and set PM schedules. The Scheduling fields on the WO form and the WO Asset view will not be used.

PM/Template	*	PM/Template	Text *						_		
PM 2		Sewer Rout	ine Pump In	spections				WO Templa	ate X Scho	eduled PM X	Grouped PM
								PM Templa	ite X Grou	uped Assets	Affected PM
PM 2	Sev	ver Routine Pump Ins	spections	USUP1	Sewer Pump	s SWP	F100 Sev	wer Pump Inspec	tion SWPP7	78 Routine M	aintenance
PM Tightly Li	nked PMs (0) PI	A Locations (0) PN	M Assets (0)	PM Tasks (1)	PM Checklists (0)	PM Exclusion	Days (0) PM T	racking (0) V	/ork Orders (1)	PM Groups (1) PM	Asset Filter (0) A
	5	•									
Group	Number	First Asset ID	Description	T							
<b>—</b> 1		L0711186	Submersible								
Grou	ped PM Scheduling	(0) PM Grouped /	Assets (2) PM	I Grouped PM	Exclusion Days (0)	PM Grouped Pl	M Tightly Linked P	'Ms (0)			
		7 H G	[] • []	<b>1</b>							
	PM Group ID	Group Desc	Y Sequence	No Y	Asset Rec #	Asset ID	Desc 1	Desc 2	Category	Asset Type	Description T
P	1		2		34	FL0711187	Submersible	Flyght	Sewer Pumps	Sewer Pump	Submersible
P	1		1		35	FL0711186	Submersible	Flyght	Sewer Pumps	Sewer Pump	Submersible

Notes:\_\_\_\_\_

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To help you create a Grouped Asset PM, we'll go through a step-by-step example.

Let's assume you have a preventative maintenance task where you perform routine pump inspections. One of your pump stations stores four separate pumps. You'd like to set up a bi-annual schedule for these inspections, and would like to inspect the pumps stored in that pump station in groups of two, at two separate times of the year; however, you'd like to use the same tasks and resources to complete the inspections. In order to do this, you'll create one PM/Template for this task that includes all four pumps in the pump station. Then, you can create two separate work orders for each pair pumps using their own group PM schedules.

- 1. Create a new PM record.
  - Enter a unique PM code-description in the header. We've titled this example, "Sewer Routine Pump Inspections".
  - Select a related Category, Main Task, and Problem.
    - As you can see in the example below, we've chosen "Sewer Pumps", "Sewer Pump Inspection", and "Routine Maintenance" as the Category, Main Task, and Problem, respectively.
  - Select the Scheduled PM checkbox. This distinguishes the PM record from a Work Template.
  - Select the Grouped PM checkbox. This allows you to create one PM for multiple assets. It also gives you access to the **Grouped PMs** Grid.
  - Select the Grouped Assets checkbox. This allows you to create one PM schedule for multiple assets.

PM/Template * PM 2	PM/Template Text * Sewer Routine Pump Inspections		WO Template X Scheduled PM X Groupe
			PM Template X Grouped Assets Affected
		WO	
Category * USUP1	Sewer Pumps	E.	Send to WO Request Comment
Problem			
SWPP78	Routine Maintenance		
Priority			
Main Task			
SWPT100	Sewer Pump Inspection		

- 2. Add checklist items, tasks, and resources needed to complete the pump inspections.
- 3. Add your Pump assets to the PM.
  - You will use the **Toolkit on the PM Grouped Assets Grid** to include assets. You will not use the PM Assets Grid for this type of PM.

PM 1	Fightly Linked PMs (0) PM Locations (0) PM Assets (0) PM
Г	
	Add Group(s) and Existing Asset(s)
	Add Group(s) and Existing Sewer Pumps Asset(s)
	Add New Group and First Asset
	Delete Group(s) and All Their Assets   Selected Record(s)

low would you like the ne Add all new assets to a	w assets to be added? new group		
Oreate individual group	os for all new assets		
Add all new assets to a	n existing group		
Jaw Group Start			
New Group Start			
Fill in missing groups	Start from last group		
Fill in missing groups	Start from last group		
Fill in missing groups	Start from last group		
Fill in missing groups	Start from last group	Start New Group	
Fill in missing groups	Start from last group	Start New Group	
Fill in missing groups	Start from last group	Start New Group 1 Please select new group number.	
Fill in missing groups Existing Groups Group Number Select an Asset	Start from last group	Start New Group 1 Please select new group number.	
Fill in missing groups Existing Groups Group Number Select an Asset Asset	Start from last group	Start New Group 1 Please select new group number.	

• Select the Toolkit option on the Grouped PM Schedules Grid and select Add New Schedule.

- 6	?	PM 2	Sewer Routine Pump	Inspections	USUP1	Sewer Pumps	SWPT100	Sewer Pump Insp	ection S	WPP78	Routi
ſ	РМ Т	fightly Linked PMs (0)	PM Locations (0)	PM Assets (0) PM	/I Tasks (1) PM	Checklists (0) PM E	Exclusion Days (0)	PM Tracking (0)	Work Orders (1	) PM Groups	s (1)
		🚘 🗔 [	j - 🔝								
		Group Number	First Asset ID	T Description	T						
-	-	1	FL0711186	Submersible							
		Grouped PM Schedu	uling (0) PM Group	ed Assets (2) PM (	Grouped PM Exclus	sion Days (0) PM G	rouped PM Tightly Lin	iked PMs (0)			
			- 🗐 🗐 -	🖬 🔆 🚺	×						
		Group ID	Work Order #	Y Status Text	T Last Start D	ate 📉 Next Sta	t Date 🝸 Last	t End Date	Next End Date	T Previo	ous Od

• You can add additional Assets by selecting the Toolkit Option Add Multiple Assets on the Grouped PM Schedules Grid, add the related assets by clicking on the checkbox next to the Asset System ID 1 button and selecting from the pick list. You'll repeat this process for each related asset.

		FL071	1186	Submersi	ble					
Group	ped PN	1 Scheduling (0)	PM Group	ed Assets (2)	PM Group	ed PM Exclusion Days	(0) PM Group	ed P	M Tightly Linked P	Ms (0)
				- 🗐 -	<b>P</b>	×				
	PM G	Add Multiple /	Assets				Asset ID	T	Desc 1	Desc 2
?	1	Add New Ass	et				FL0711187		Submersible	Flyght
<u> </u>	1	Add Sewer Pl	pe by Ait IL onduit by Al	t ID			FL0711186		Submersible	Flyght
		Move Assets	To Another	Group   Sele	cted Reco	rd(s)				
		Sewer Stretch	ı							
		Storm Stretch								
	_									
dd	Multij	ole Assets				Add Multiple	Assets			
Ch	00058 A	Category				emp r Ro Choose A Cate	igory			
		outegory				Loca USUP1		Sev	ver Pumps	
						Select an Asse	t			_
A	hect an A	ASSET		Description		Asset		Ass	et Description	
	Asset		Asset	Description		711		_		

- In our example below, we've selected four pumps housed at a Sewer Pump Station.
- Each asset will have a unique PM Group ID.

-	6	PM 2	Sew	er Routine Pum	p Inspections	USUP1	Sewer Pump	s SWP	T100 Sev	ver Pump Insp	ection SW	/PP78 Rout	ine Maintenance
	РМ Т	ightly Linked Pt	4s (0) PM	Locations (0)	PM Assets (0)	PM Tasks (1)	PM Checklists (0)	PM Exclusion	Days (0) PM T	racking (0)	Work Orders (1)	PM Groups (1)	PM Asset Filter (0)
		•	· 🗊 י										
		Group Numbe	r 🝸 F	irst Asset ID	T Description	T							
	-			0711186	Submersible								
		Grouped PM	Scheduling (	0) PM Group	bed Assets (4)	PM Grouped PM	Exclusion Days (0)	PM Grouped P	M Tightly Linked P	Ms (0)			
			-		<b>_</b>	12 x							
		PM G	oup ID	Group Desc	Sequen	ce No 📉 🍸	Asset Rec #	Asset ID	Desc 1	Desc 2	Category	Y Asset Type	T Description
		1 📂			4		37	FL8820806	Submersible	Flyght	Sewer Pumps	Sewer Pump	Submersible
		1 🖻			3		36	FL8820805	Submersible	Flyght	Sewer Pumps	Sewer Pump	Submersible
		1 🖻			2		34	FL0711187	Submersible	Flyght	Sewer Pumps	Sewer Pump	Submersible
		P 1			1		35	FL0711186	Submersible	Flyght	Sewer Pumps	Sewer Pump	Submersible

### Notes:\_\_\_\_

- 4. Group the related assets into the two pairs you would like to inspect at a time.
  - Hold down the Ctrl key and select two of the four pump assets in the Grouped Assets grid.
  - Select the Toolkit option on the PM Grouped Assets grid and select *Move Assets To Another Group* | *Selected Record(s)*. Right click on the highlighted assets and select *Group Assets*.

					0711186		Sub	mersible									
	G	Groupe	ed PM S	Scheduling (I	D) P	M Grouped	1 Assets	(4)	PM Grou	ped PM Exclus	sion Days (0)	PM Group		4 Tightly Lin	ked Pl	Ms (0)	
				-				•	<b>F</b>	×							
			PM Gr	Add Multip	le Ass	ets						Asset ID	T	Desc 1	T	Desc 2	
	2	?	1	Add New A	Asset							FL8820806		Submersib	ie	Flyght	l
		?	1	Add Sewei Add Storm	Cond	uit by Alt	ID					FL8820805			le		
		9	1	Move Asse	ets To /	Another C	Group	Select	ed Rec	ord(s)		FL0711187		Submersib	ole	Flyght	
		9	1	Sewer Stre Storm Stre	etch tch							FL0711186		Submersib	le	Flyght	
M	love A	٩ss	ets '	To Ano	ther	Grou	p   S	elect	ed R	ecord(s)	)						
emp	Please	e sele	ect an i	item.													
Loc	e Gi	roup															
	C	urren	nt Grou	p - 1													
rst A	A Ne	ew G	iroup -	2													
	1°																
	6																

• There are now 2 PM Groups. The first pair of pump assets have PM Group ID of 1 and the second pair was given a PM Group ID of 2

-	1	PM 2		Sewer Routine Pum	p Insp	ections				Sewer Pumps		SWPT100	Sewer Pump In:	pection	SWF	P78	Routin
	PM Tightly Linked PMs (0)		(0)	PM Locations (0)		Assets (0)	РМ Та	PM Tasks (1) PM		Checklists (0)	PM Exclusion Days (0)		PM Tracking (0)	Work Orders (1		PM Groups	s (2)
		- 5	F	• <b>E</b>													_
		Group Number	T	First Asset ID	T	Description	T	r									
	÷	1		FL0711186		Submersible											
	÷	2		FL8820805		Submersible											

• The first pair of pump assets will be given one PM Group ID and the second pair will be given a separate PM Group ID. This allows the two asset pairs to have separate PM schedules.

	Group N	umber	<b>Firs</b>	st Asset ID	T Des	scription	T							
-	1		FL07	711186	Subr	nersible								
	Groupe	d PM Sche	eduling (0)	P II Gro	uped Assets	(2) PM G	rouped PM	Exclusio	on Days (0)	PM Group	ed PM Tighti	/ Linked F	PMs (0)	
			$\uparrow$		J	) - 1			_		_			
	F	PM Group I	DY	Group De	sc 🝸 :	Sequence No		Asset Re	ec # 📉	Asset ID	T Desc	1 1	Desc 2	
	7 1							34		FL0711187	Subm	ersible	Flyght	
	<b>P</b> 1	l				1	:	35		FL0711186	Subm	ersible	Flyght	
	_													
	Group	Number	T	First Ass	et ID	Descrip	tion							
÷	1			FL071118	6	Submers	ible							
-	2			FL882080	5	Submers	ible							
	Grou	iped PM S	Schedulin	g (0) 🛛 P	M Grouped.	Assets (2)	PM Gro	uped P	M Exclusior	n Days (0)	PM Grou	ped PM	Tightly Linked F	PMs (0)
			•			· 🗊	- -	×				_		
		PM Gro	up ID	T Gro	up Desc	Y Seq	uence No	T	Asset Red	:# 🍸	Asset ID	T	Desc 1	Desc 2
	1	2				4			37		FL882080	6	Submersible	Flyght
	1	2				3			36		FL882080	5	Submersible	Flyght

- 5. Schedule your PMs.
  - You will use the **Grouped PM Scheduling** Grid to schedule your Grouped Asset PM. You will not use the Scheduling fields on the Work Order Form for this type of PM.
  - Select the Toolkit on the Grouped PM Scheduling Grid and select *Add New Schedule*. In the example below, we have set up a fixed schedule based on the last start date of the work order (using the PM Last Start Date field).

PM Tightly Linked PMs	(0) PM Locations (0)	PM Assets (0) PI	M Tasks (1)	PM Checklists (0)	PM Exclusion Days (0	) PM Tracking
	🗐 • 🔛					
Group Number	First Asset ID	T Description	T			
- 1	FL0711186	Submersible				
Grouped PM Sc	heduling (0) PM Grou	ped Assets (2) PM (	Grouped PM E	clusion Days (0)	PM Grouped PM Tightly	/ Linked PMs (0)
📃 📐 📮		🖬 🔆 T	×			
Group A	dd New Schedule			Ne	ext Start Date	Last End Date

• The Grouped PM Schedule will automatically apply to all of the assets in the selected group. Determine whether you would like to use a **fixed** or **floating** schedule. In the example below, we have set up a fixed schedule based on the last start date of the work order. We have set a 6-month interval for work order generation.

b	🔒 🖶	<> <> [	e 🖸 🗸 🍪						
	Last Start Date	e	Start Date Interval	Start Inter	rval Code		Next Start Dat	te	Days Ahead
	9/7/2016	<b>m</b>	6	3	Months	=	3/7/2017	<b></b>	
	Last End Date		End Date interval	Endinter	vai Oude		Next End Date		
		<b>(11)</b>							
	Previous Odo	motor	Odometer Interval				Next Odomete		Odometer Abea

• The PM Group ID will appear in the Grouped PM Schedules grid. This identifies which assets are on this PM schedule.

	Group	Number	T	First A	sset ID	T	Descript	ion 🝸
-	1		F	L0711	186		Submersil	ble
	Grou	iped PM Schedu	ling	(1)	PM Grou	uped As	sets (2)	PM Group
		) 💼		٦		• <b></b>	la 🏓	ę 💌
		Group ID	T	Work	Order #	T	Status T	Text 🝸
	P	1		18-00	00239		WO Ger	nerated

• Repeat the scheduling process with the next PM group. With this type of PM, you can choose any type of schedule you'd like for the second group.

Notes:			

View the generated work orders.

• On the PM Grid, Select the Associated WOs grid. You will see the new work order listed as their separate generation schedules are reached. To view the work orders select the relationship

ico	n	<b>;</b> ,	Tł	hen Sel	ect Work (	Orders ().								
0	IC.	Ciry.	1	Home S	cheduled PMs 🚫 🗍	Scheduled PMs - PM	2 🛞 🔲	Vork Orders (	2) 🗶 🛨					
🛅 📐 😰 · 🔞 · 🍸 · 🧢 🚘 🥔 🏠 🕌 🗐 🕄 🖼 🗐 · 🖼 😹 🥫						C								
		Work Order #	T	Category T	Problem T	Main Task	Priority T	Reason T	Lead Worker	Ŧ	Status T	Status Date	Start Date	End
÷	1	18-000240		Sewer Pumps	Routine Maintenance	Sewer Pump Inspection					New Work Order	09/07/2018	03/07/2017	
÷	6	18-000239		Sewer Pumps	Routine Maintenance	Sewer Pump Inspection					New Work Order	09/07/2018	03/07/2017	

• On the new work orders, you will see the Category, Problem, and Main Task that you chose in the PM. Additionally, the checklist items, tasks, and resources will be included. As you can see below, this Work Order's Assets tab contains the two pumps from the second PM group that we created.

		-		) - (*	-	) 🧢	•	$\bigcirc$	俞		J		•	<b>F</b>	200	ę 🗖			
		Work Order #	$\overline{\mathbf{T}}$	Category	T	Problem		T	Main	Task		T	Pri	ority	T	Reason	T	Lead	y t
- 2	2	18-000240		Sewer Pum	ps	Routine Ma	aintena	ance	Sewe	r Pump	Inspectio	on							
	Locat	tions (0) Asse	ets (2)	Tasks (1)	Ch	ecklist (0)	wo	Comments	s (0)	Trackinę	g (7)	PM/Wor	k Ter	nplates (*	1)				
			•	-			J		-	🌲 🕻		×							
		Sequence	YA	sset Type	Y	Category	Υ.	Complet	ion Date	•	Asse	et ID	T	Desc 1		Y Desc	2	T C	Dd
	1	3	S	ewer Pump		Sewer Pum	ps				FL8	320805		Submer	sible	Flygh	t		
	6	4	S	ewer Pump		Sewer Pum	ps				FL8	320806		Submer	sible	Flygh	t		

6. Close the work orders by entering an End Date and setting the Status to "999-Complete". This will enable the PMs to generate new work orders at the next scheduled intervals.

## Tightly Linked PMs

The third type of advanced PM is the **Tightly Linked PM**. This feature allows you to have a series of two or more sliding PMs that are generated based on a single, scheduled PM. In other words, Tightly Linked PMs are not based on time (like a Scheduled PM), but instead are based on how often the initial PM (or linked PM) is generated.

To explain this feature, we'll go over a detailed example. We'll first set up the initial Scheduled PM, and then show you how the Tightly Linked PMs are set up and scheduled:

- 1. Open a vehicle record in the *Fleet Inventory* module.
  - Using the Web application open a tab within Modules *Fleet>>Fleet>>Fleet Inventory*.
  - In the example below, you can see that we've accessed a *Fleet Inventory* record for a CCTV Truck.

Hour Rollbacks (0)       Insurance Costs (0)       Odometer Rollbacks (0)       Other/         Travel Logs (0)       Fleet Inspections (0)       PM/Work Templates (1)       Other/         UCCITY       Home       Fleet IS       Image: Cost (0)       Image: Cost (0)       Image: Cost (0)         Image: Cost (0)       Fleet IS       Image: Cost (0)         Image: Cost (0)       Image: Cost	Fleet_Inve  <	(i) Tasks (ii) Comp entory Form ( Class	X +	Tracking (0) Tire Histo	et Rec # *	Fuelings (34)
UCITY Home Fleet Fleet Fleet ID Text CCTV Truck Perating Status Operational	Fleet_Inve	entory Form( Class	× +	Fle	et Rec # *	13 of 62
eet ID * Fleet ID Text O23 CCTV Truck perating Status Operational	•	Class		Fle	et Rec # *	13 of 62
eet ID * Fleet ID Text 1023 CCTV Truck perating Status Operational		Class		Fle	et Rec # *	
D023 CCTV Truck perating Status Operational		Class				
Operational		Class			35	
		HEO Ho	aw Equipmo	unt .	=	
anufacturer		Model	avy Equipme	#11L		
Ford	=	Econoline				
ork Employee			≡			
perator	Year			Fuel Type		_
perator Email	Color			Fuel Tank Size		=
	White			0		
partment	Plate		_	Oil Type		
	E1157248			1 5W-30		
ategory	Radio Number			Engine Oil Quant	tity	
	None			U		
	1FDXE45S47	DA78765				
wnership	Title					
=						
ofit Center	Capacity					
	CMA			X Odometer		
Sec Number	0.444			Hourmeter		
O Equip Code	· · · · · · · · · · · · · · · · · · ·					
023 🔳 🔻						
sset Class						

Notes:\_\_\_\_\_

- 2. Create an initial, Scheduled PM for a 3-month oil change.
  - Click the Create New PM/Template button on the Fleet record's module toolbar. A PM/Template will be generated with the Truck asset and category included.

		🕇 Home	E Fleet Records X	<u>+</u>
D		• 💽 • 🐧	1 - 🧢 🔾 î	' 🚘 🔘 🥝
	Fleet ID	Fleet ID Text	_	Operating
- 🖻	0023	CCTV Truck		Operation
Hou	r Rollbacks (0)	Insurance Costs (	0) Odometer Rollbacks (0)	OtherMeter Rollbacks
Trav	el Logs (0)	Fleet Inspections (0)	PM/Work Templates (1)	
		- 📮 🗐 -	<b>E</b>	
	Reset Date	Prior Meter F	Read T New Meter Rea	ad 🝸 Units Used
Select optio	ons for crea	•Selected Record(s) (1)	○Filtered Record	× )
Created Us	sing:	New PM	Existing Templa	te
Category Co	de	Fleet Maintenance		
d Main Task		Oil Chango	:=	
FLITOO		Oil Change	=	
106				
Can	cel			ок

- Create a unique PM/Template code-description in the header. We've titled this example, "CCTV Truck PM A Oil Change".
- Unselect the WO Template and Select the **Scheduled PM** checkbox. This distinguishes the PM from a Work Template and allows you to use the scheduling function.

		] 🛃 🦏	d 🖉	- 60	· 🔅								
	PM/1 CC	Template * TV Truck PM A	PM/Ten Oil Cł	nplate Text * hange	]			WO Templa	ite X Sche	duled PM			
								PM Templa	te Grou	ped Assets			
$\left[ \right]$	Cate	gory *				WO	Send to	WO Request Cor	nment				
	OF		Fleet Maintena	ance		Ē							
		PM/Template	PM/Template Tex	t 🔍 Category	Category Text	Main Task	Main Task Text	Problem	Problem Text	WO Templ	ate 🝸	PM Template	T I
-	1	CCTV Truck PM A	Oil Change	OF	Fleet Maintena	Ince FLTT88	Oil Change						
	PM L	ocations (0) PM As	sets (1) PM Asse	et Filter (0) PM Tasks	0) PM Checklists	s (0) PM Exclusion	Days (0) PM Trackin	g (0) Work Orders	(0) PM Groups (	0) PM Tightly Link	ed PMs (0)	Associated W	Os (0)
			• 💼 🛛	• L 📮 🗍	) - 🎼 🗄							C	20
		Sequence No	Category T	Category Text	Asset Type	Asset Type Text	Asset ID	Desc 1 📉 D	esc 2	Description	-		
	<b>P</b>	1	OF	Fleet Maintenance	32	Fleet	0023	CCTV Truck H	eavy Equipment	CCTV Truck			

Notes:	 	 

- 3. Determine whether you would like to use a **fixed** or **floating** schedule.
  - In this example, we'll demonstrate use of a **floating** schedule (based on the date the work order is closed). Remember, the Grouped PM and Grouped Asset PM examples earlier in this workbook both used fixed schedules.
  - Open the PM/Template Form and find the Schedule Section, enter a work order end date in the Last End Date field. This field will automatically be updated each time a work order is completed.

PM/Template	PM/Template Text *				
CCTV Truck PN	I A Oil Change			WO Template X Scheduled PM Groupe	ed Pl
				PM Template Grouped Assets Affecte	ed PN
Category 1			WO	Sand to WO Request Comment	
OF	Fleet Maintenance		Ca.		
Problem					
			=		
Priority	=				
Main Task					
FLTT88	Oil Change		=		
Cause			=		
Supervisor			-	Crew Comment	
			=		
Assigned Crew			=		
Lead Worker					
			≡		
Reason	-				
Department	=				
OF Fleet		≡			
Division					
		=			
Maintenance Zone	*		=		
		S	Schedule		_
Last Start Date	Start Date Interval	Start Interval Code		Start Next Date Days Ahead	
Last End Date	End Date Interval	End Interval Code		End Next Date	
9/7/2016	3	3 Months		≡ 12/7/2016 📾	

- Select the interval for the next PM to be generated.
  - In this example, we've set a 3 month interval.
- Click in the Next End Date field and the date will automatically be populated based on the end date and the selected interval.

• Because we set this PM up with a date in the past, the work order will be automatically generated and the status will read "2 - WO Generated" and the WO Number and Initiated Date

	Last Start Date	Start Date Interval	Start Interval Code	Schedule	Start Next Date	Days Ahead
L	9/7/2016 🛍	3	3 Months		12/7/2016 🛍	
l	Previous Odometer	Odometer Interval	Next Odometer	Odometer Ahead		
l	Previous Hourmeter	Hourmeter Interval	Next Hourmeter	Hourmeter Ahead		
l	Previous Other	Other Interval	Next Other	Interval Ahead	_	
	Status 2 WO Generated		WO Number 18-000241	Initiated Date 9/7/2018		

fields will be populated after selecting Save

• After you have set up your PM schedule, close and save the record.

Notes:	 	 	

• Each time a PM work order is closed, the PM schedule resets itself. When a PM is reset, if the date is in the future, the status will read "1 - Awaiting WO Generation" and the WO Number and Initiated Date fields will be blank. These settings will remain until the next work order is generated.

	Status		WO Number	Initiated Date
	1	Awaiting WO Generation		<b>m</b>
_				

- 4. Create a second PM to be tightly linked with the first. This PM will be generated every six months and will include an oil change plus additive.
  - Click the Create New PM/Template button on the Fleet record's module toolbar. A PM/Template will be generated with the Truck asset and category included.
  - Create a unique PM/Template code-description in the header. We've titled this one, "CCTV Truck PM B Oil Change Plus Additive".

- Unselect the WO Template checkbox and Select the **Scheduled PM** checkbox. This distinguishes the PM from a Work Template.
- Select the **Tightly Linked PM** checkbox. This allows you to have a sliding PM schedule. The scheduling grid will be disabled.

PM/Template *	PM/Template Text *				
CCTV Truck PM B	Oil Change Plus Additive		WO Template	X Scheduled PM Grouped PM	Inactive
		-	PM Template	Grouped Assets Affected PM	X Tightly Linked PM
		WO			
Category *	Eleet Maintenance	<b>P</b>	Send to WO Request Comm	ent	
Broblem	r loor maintenance	C			
Problem		=			
Priority					
	=				
Main Task					
FLTT100	Oil Change Plus Additive	Ξ			
elect the <b>P</b>	M Tightly I inked PA	As arid and select th	o Add Record id	-on 🚺	
		is grid and select th	e Add Record R	.011 — .	
Work PM_Template	e Standard View (X) +				
🔁 📘 💽 🔹	🛞 ·   🌹 · 🧢 💼 (	🧭 🏠 🔡 📮 🗊 🛯	🔄 🔆 🔽		
PM/Template	T PM/Template Text T Cate	gory 🝸 Category Text 🍸 Main Tas	k 🍸 Main Task Text	Y Problem Y Problem Text Y WC	D Template Template
CCTV Truck PM	B Oil Change Plus Additive OF	Fleet Maintenance FLTT100	Oil Change Plus Additive		_
PM Locations (0)	PM Assets (1) PM Asset Filter (0) PM Tas	ks (0) PM Checklists (0) PM Exclusion Da	ays (0) PM Tracking (0) Work (	Orders (0) PM Groups (0) PM Tightly Linked PM	Ms (0) Associated WOs (0)
	-5 🗊 🔹 🔝				_
Affected PM	Tightly Linked PM T Routine Co	ode 🝸 Routine Text 🍸 # Between	PMs 🝸 # Remaining 🝸		
		s	chedule		
Last Start Date	Start Date Interva	I Start Interval Code		Start Next Date	Days Ahead
				<b>m</b>	
Last End Date	End Date Interval	End Interval Code		End Next Date	
	<b>m</b>			<b></b>	
Denvirus Ortere	oten oten leter	New Odenester	Oderester the ed		
A 🗆 🔍 🇸					
Y Tightly Links	od DM				
A Tighty Links	Affected PM				
Routine Code *					
# Between PMs					
# Domaining					
# Kemaining					

- Select a Routine Code from the Other Affected PMs pick list (**F9**). Only PMs with a matching Category and Asset will appear. To tightly link your PMs, select the scheduled PM you just created.
- 5. We'll use the **# Between PMs** and **# Remaining** fields to schedule the Tightly Linked PM. But first, in order to explain how these two fields are used, we'll go over a few examples by looking at when Work Orders are due. In the grids below, PMA represents the initial Scheduled PM and PMB represents the Tightly Linked PM.

•

• In the simplest scenario, PMB will alternate with PMA. In the example below, PMB is due every second time PMA generates a Work Order.

Job:	Time>				
	WO 1	WO 2	WO 3	WO 4	WO 5
PMA					
PMB					

- $\circ$  So, the number of PMAs between each generation of PMB is 1.
- **# Between = 1**
- In the example above, PMA is generated first and PMB second. Alternatively, PMB could have been scheduled to generate first. This is controlled by the # Remaining.
  - If PMB generates after one PMA, there is 1 PMA remaining.

$\circ$	#	Rem	aining	= 1
0	π	I.C.III	unnig	

Job:	Time>			
	WO 1	WO 2	WO 3	WO 4
PMA				
PMB				

• If PMB is due to generate first, there are no PMAs remaining before PMB is due.

• # Remaining = 0

Job:	Time>			
	WO 1	WO 2	WO 3	WO 4
PMA				
PMB				

• Using these settings, any number of sophisticated PM programs can be made. In this next example, the initial Scheduled PM alternates with two jobs that alternate themselves. Remember, PMA is the initial Scheduled PM.

Job:	Time>												
	WO 1	WO 2	WO 3	WO 4	W0 5	W0 6	W0 7	W0 8	WO 9	WO 10			
PMA													
PMB													
PBC													

• PMB: **# Between = 3, # Remaining = 1** 

• PMC: **# Between = 3**, **# Remaining = 3** 

You can start this compound scheduling program at any point in the cycle by setting the **# Remaining** = 0 and 2, 1 and 3, 2 and 3, or 3 and 1. The **# Between** always remains 3.

- 6. Now that you understand how tightly linked PM scheduling works, you can set up the **# Between** and **# Remaining.** 
  - Enter the # Between PMs that this PM will be generated. Since this Tightly Linked PM should generate every six months and the initial Scheduled PM is generated every three months, the # Between = 1.

- Indicate the # of PMs Remaining before this PM is generated. Since we want PM B to generate at the six-month mark (with the second, three-month oil change), set the **# Remaining = 1**.
- Note: The # Remaining field will automatically change each time the Work Order that generated PM A is closed. In the example below, after PM A is reset, the # Remaining will reset to 0, signifying that PM B will be generated.

🔁 🖶 🖶 🦘 🧼	E 💽 🔹 🌼	
X Tightly Linked PM Routine Code *	Affected PM	
CCTV Truck PM A	Oil Change	≡
# Between PMs 1 # Remaining		
1		

- 7. Using this grid, PM B has been tightly linked to our previous oil change PM A.
  - PM A will be generated on a floating schedule every three months.
  - PM B will be tightly linked to PM A. Based on the numbers we set up, it will be generated after one PM A has been completed. Thus, every six months, a work order will be created for this truck requiring an oil change plus additive.

-	P	CCTV Truck PM B Oil Change Plus Additive		OF	Fleet Maintenand			ce FLTT100 Oil Change I			Additive									
	PM L	ocations (0) PM	M Asse	ets (1)	PM Assel	Filter (0)	PM Tasks (0)	PM	1 Checklists (0) F	PM E	Exclusion Days (0)	РМ	Tracking (0)	Work O	rders (0)	PM Groups (0	J)	PM Tightly Linke	d PMs (1)	Ì
			J		•	] ; <b>)</b>	×													
		Affected PM	T	Tightly Li	nked PM	T	Routine Code	T	Routine Text	T	# Between PMs	T	# Remaining	T						
	1				af.		CCTV Truck PM A	۱	Oil Change			1		1						

Notes:\_\_

- 8. As the work orders are generated, you can access them in two ways:
  - On the PM A PM Template Form within the Schedule fields, you will see that the Status is "2-WO Generated". Beside the status, you will see the generated WO Number and initiated date.

Last Start Date	Start Date Interval	Start Interval Code	Schedule	Start Next Date
Last End Date	End Date Interval	End Interval Code		End Next Date
9/7/2016	3	3 Months		12/7/2016 🗎
Previous Odometer	Odometer Interval	Next Odometer	Odometer Ahead	
Previous Hourmeter	Hourmeter Interval	Next Hourmeter	Hourmeter Ahead	
Previous Other	Other Interval	Next Other	Interval Ahead	
Status		WO Number	Initiated Date	
2 WO Generated		18-000241	9/7/2018	m

• On the PM A Grid, Select the Associated WOs grid. You will see the new work order listed as their separate generation schedules are reached. To view the work orders select the

		-		-			_					
	🛓 📋 🛛	) - 🌹 - 🪄	) 🖬 🥘	🏠 🔡 📮		• 🔚 🎖	¥ 🗵					
	PM/Template	PM/Template Text	T Category	T Category Text	T N	Main Task	Main Task Text	T	Problem	Problem Text	WO Template	PM Template
+ 🖻	CCTV Truck PM B	Oil Change Plus Additiv	e OF	Fleet Maintena	nce F	FLTT100	Oil Change Plus	Additive				
- 🖻	CCTV Truck PM A	Oil Change	OF	Fleet Maintena	nce F	FLTT88	Oil Change					-
PM	Locations (0) PM As	sets (1) PM Asset Filte	r (0) PM Tasks (0)	PM Checklists (0)	PM Excl	lusion Days (0)	PM Tracking (0)	Work Orders	(1) PM Group	s (0) PM Tightly Lin	ked PMs (0)	Associated WOs (1)
	- 🗐 -	<b>E</b>									_	
Ass	sociated PM Y As	ssociated PM Text	Closed PM	Link To PM Schedul	ng	T Link to PMs	T Link To W	ork Order	T			
ССТ	V Truck PM A Oil	Change				15312	18508					
	- 41 1-1											
Rei	ationship	S										
	Mark Ordere (					_						
	work Orders (	(1)										
				Clos	se							
	_		_									

relationship icon 🤽. Then Select Work Orders ().

Notes:\_\_

- 9. In order for PM B to be generated, you must close out (complete) the initial work order generated from PM A.
  - Enter the End Date in the field provided.
  - Set the status in the header to "999 Complete".

Work Order #	Work Order #		Status			Statu	Status Date Status Time					
18-000241		999	Complete	=		9/7/	2018	(iii)	05:08	PM O		
Category *				Wo	ork Ord	der	Commen	t From Re	quest			
OF	Fleet Maintenance				<b>E</b>							
Problem					_							
Briority					=							
Flority	=											
Main Task												
FLTT88	Oil Change				=	1						
Cause					≡		Start Dat 12/7/20	e 016 🕅		Start Time 08:00 AM	0	
Supervisor			=				End Date	16 📾		End Time	0	
Assigned Crew			-			Ļ	Departme	ent				
					≡		OF	Fleet				≡
Lead Worker			=			1	Division					
			=									

10. Review PM A. As you can see, the next work order has been generated and the dates in the schedule have also changed.

		:	Schedule		
Last Start Date	Start Date Interval	Start Interval Code		Start Next Date	Days Ahead
Last End Date	End Date Interval	End Interval Code		End Next Date	
12/8/2016	3	3 Months		3/8/2017 🛗	
Previous Odometer	Odometer Interval	Next Odometer	Odometer Ahead		
Previous Hourmeter	Hourmeter Interval	Next Hourmeter	Hourmeter Ahead		
Previous Other	Other Interval	Next Other	Interval Ahead		
2 WO Generated		WO Number 18-000242	Initiated Date 9/7/2018		

- 11. Review PM B.
  - The # Remaining field has been reset to 0.

-	1	CCTV Truck PM B	Oil Change Plus Additive	OF	OF Fleet Maintenance FLTT100 Oil Change Plus Additive					
	PMI	Locations (0) PM As	sets (1) PM Asset Filter	(0) PM Tasks (0)	PM Checklists (0)	PM Exclusion Days (0)	PM Tracking (0)	Work Orders (0)	PM Groups (0)	PM Tightly Linked PMs (1)
			i 🗐 🔹 🔝	e 🗵						
		Affected PM	Tightly Linked PM	Routine Code	Routine Text	# Between PMs	# Remaining	T		
	1		×.	CCTV Truck PM A	Oil Change		1	0		

- Since the first oil change PM A has been completed and a second has been generated, the tightly linked PM B (oil change plus additive) has now also been generated and is included in the new work order.
- You'll see that the work order appears on PM B's Assocatied WOs Grid

-	6	CCTV Truck PM B	Oil Change Plus Additive	OF	Fleet Maintenan	e FLTT1	100	Oil Change Plus	Additive			-	•
	PM	Locations (0) PM Ass	ets (1) PM Asset Filter (0)	PM Tasks (0)	PM Checklists (0)	PM Exclusion	n Days (0)	PM Tracking (0)	Work Orders	(1) PM Groups	(0) PM Tightly Link	ed PMs (1) Ass	sociated WOs (1)
		- 🗐 🔁	<b>S</b>										(
	Asso	ciated PM TASS	ociated PM Text	Closed PM	Link To PM Schedu	ling 🛛 🝸	Link to PMs	Tink To	Work Order	T			
	ССТУ	Truck PM B Oil C	hange Plus Additive				15313	8510					

- 14. Open the new work order by double clicking on the listing in the Related WOs tab of either PM.
  - The new work order contains both PM tasks (PM A and PM B). These are displayed on the PM/Work Templates Grid.

-	P 18-000243 Fleet Maintenance			(	oil Change F	Plus	Additive							
	Loca	ations (0)	Assets (1)	Tasks (0)	Checklist (	(0) WO Commen	ts (0)	racking (5)		PM/Work Templat	tes (2) Wo	ork Orders (0)		
				🌔 - 🧉	• j		<b>.</b> .		3	61				
	PM/	Template	Y PM/	Template Text		Category Y	Catego	ry Text	T	Main Task	Main Ta	sk Text	T	Pro
	ССТ	V Truck PM	B OII (	Change Plus A	dditive	OF	Fleet M	aintenance		FLTT100	Oil Cha	nge Plus Additive		
	ССТ	V Truck PM	A Oil (	Change		OF	Fleet M	aintenance		FLTT88	Oil Cha	nge		

- 15. Close the work order as before.
  - Both PMs will now be reset to "1-Awaiting WO Generation". PM B will be reset to have 1 PM A remaining before it will be generated again.

		S	Schedule		
Last Start Date	Start Date Interval	Start Interval Code			
Last End Date	End Date Interval	End Interval Code			
Previous Odometer	Odometer Interval	Next Odometer	Odometer Ahead		
Previous Hourmeter	Hourmeter Interval	Next Hourmeter	Hourmeter Ahead		
Previous Other	Other Interval	Next Other	Interval Ahead		
Status		WO Number	Initiated Date		
1 Awaiting WO Gene	eration		(iii)	0	
👝 🧬 CCTV Truck PM B	Oil Change Plus Additive	Fleet Maintenance	e FLTT100	Oil Change Plus Additive	
CCTV Truck PM B      PM I ocations (0) PM (	Oil Change Plus Additive	Fleet Maintenance	FLTT100	Oil Change Plus Additive	(2) CM Groupe (I) CM Trability Linked DMs (1)
CCTV Truck PM B     PM Locations (0) PM A	Oil Change Plus Additive	(0) PM Tasks (0) PM	FLTT100	Oil Change Plus Additive ays (0) PM Tracking (0) Work Order	s (2) PM Groups (0) PM Tightly Linked PMs (1)
PM Locations (0) PM A	Oil Change Plus Additive Assets (1) PM Asset Filter	(0) PM Tasks (0) PM	FLTT100 I Checklists (0) PM Exclusion D	Oil Change Plus Additive ays (0) Y PM Tracking (0) Y Work Order	s (2) PM Groups (0) PM Tightly Linked PMs (1)
PM Locations (0) PM A Affected PM	Oil Change Plus Additive Assets (1) PM Asset Filter	(0) PM Tasks (0) PM (0) PM Tasks (0) PM (0) T (0) PM Tasks (0) PM (0) PM Tasks (0) PM (0) PM Tasks (0) PM (0) PM Tasks (0) PM	P FLTT100 I Checklists (0) PM Exclusion D Routine Text Y # Between	Oil Change Plus Additive ays (0) YPM Tracking (0) Work Order PMs Y # Remaining Y	s (2) PM Groups (0) PM Tightly Linked PMs (1)

## Tightly Linked Group PMs

The final type of advanced PM is the **Tightly Linked Group PM**. This feature combines the Tightly Linked PMs and Grouped PMs discussed previously. It allows you to link PMs to a grouped PM system.

Reminder: Tightly Linked PMs are not based on time or schedules, but instead are based on how often the initial PM is generated. Grouped PMs allow you to create one PM record for multiple assets.

Let's assume you have a preventative maintenance task where you cut the grass in your city's parks every week, and cut and trim the park grass every two weeks. You'd like to set up only two PM/Templates (one for each task). These templates will include all of the parks in your city, as well as the crews, resources, and checklist items needed to complete the PM tasks. You'd like to easily schedule these tasks and create work orders based on the same template. The Tightly Linked Group PM feature allows you to accomplish this goal.

To explain this feature, we'll go over a detailed example:

- 1. Create a new, Grouped PM record (this follows the same steps described earlier in this workbook).
  - Enter a unique PM code-description in the header. We've titled this example, "Cut Park Grass".
  - Select a related Category, Main Task, and Problem.
    - As you can see in the example below, we've chosen "Parks", "Mowing", and "Routine Maintenance" as the Category, Main Task, and Problem, respectively.
  - Select the Scheduled PM checkbox. This distinguishes this PM record from a Work Template.
  - Select the **Grouped PM** checkbox. This allows you to create one PM for multiple assets. It also gives you access to the **Grouped PMs** tab.

•	🖶 🍕	s 冷 🧢 🞩 🖪 💽 🔹 🌼			
	PM/Template * CPG	PM/Template Text * Cut Park Grass		WO Template	X Scheduled PM X Grouped PM
				PM Template	Grouped Assets Affected PM
	Category *		wo	Send to WO Request Comm	ent
	PP	Parks	<b>E</b>		
	Problem				
	PRKP00	Routine Maintenance	=		
	Priority	=			
	Main Task				
	PRKT47	Mowing	=		

- 2. Add checklist items, tasks, and resources needed to cut the park grass.
- 3. Add your Park assets to the PM.
  - You will use the PM **Groups Grid** to include assets. You will not use the PM Assets Grid for this type of PM.
    - In our example, we will use the Toolkit option on the PM Groups grid and select Add Group(s) and Existing Parks Asset(s).

CPG	CPG Cut Park Grass		Parks PRKT47			Mowing			Routine Maintenance			
Locations (0)	PM As	sets (0)	PM Asset Filter (0	)) PM Tasks (0)	PM Checklists	s (0)	PM Exclusion Days (0)		PM Tracking (0)		Work Orders (0)	PM Groups (5)
	] [		<b>F</b>									
Add Grou	up(s) and	Existing	Asset(s)									
Add Grou	up(s) and	Existing	Parks Asset(s)									
Add New Group and First Asset												
Delete G	Delete Group(s) and All Their Assets   Selected Record(s)											

• After selecting the Toolkit option a popup dialog will display.

Add all new assets to a Add all new assets to a Create individual group Add all new assets to an This PM Doesn't allow multip New Group Start Fill in missing groups	How would you like the new assets to be added?  Add all new assets to a new group  Create individual groups for all new assets Add all new assets to an existing group This PM Doesn't allow multiple assets on groups so those options have been disabled.  New Group Start Fill in missing groups  Start from last group Please select where the individual groups should start.								
Please select where the indiv	Please select where the individual groups should start.  Existing Groups Start New Group								
Group Number		New Group Number							
Select an Asset									
Asset	Asset Description								
Cancel			ок						

 $\circ~$  The assets selected will be added to the PM Grouped Assets Grid. Each asset will be given its own unique PM Group ID.

PML	ocations (0)	PM Assets	(0)	PM Asset Filter (0)	) PM Tasks (0)	PM	Checklists (0)	PM	Exclusion Days (0)	PM Tracking (0)	Work Orders (0)	PM	I Groups (5)
	<b>-</b>		•	<b>F</b>									
	Group Numb	er 🍸	First	Asset ID 🛛 🍸 🕻	Description	T							
-			06	т	OMAHAWK RIDGE								
	Grouped Pl	A Scheduling	(0)	PM Grouped Asse	ets (1) PM Grou	ped PN	1 Exclusion Day	rs (0)	PM Grouped PM	Tightly Linked PMs (	0)		
		<b>-</b>	$\uparrow$		1 - 🗈	×					_		
	PM	Group ID	T	Group Desc	Sequence No	T	Asset Rec #	T	Asset ID	Desc 1	T Desc 2	Ca	tegory
	1				1		179		106	TOMAHAWK RIDGE		Pa	rks
			▼ (U)			, <b>1</b>		, , ,	W Exclusion Days			s (0)	T M Croups (o
	Group Num	ber 🝸	Firs	t Asset ID	Description								
÷	1		106	-	TOMAHAWK RIDG	θE							
-	2		121		Blue Valley Parkwa	ıy							
	Grouped P	M Schedulin	g (0)	PM Grouped As	sets (1) PM Gro	ouped I	PM Exclusion E	)ays (0	) PM Grouped	PM Tightly Linked Pf	⁄ls (0)		
			•••• ↑		🗐 🛛 🖻	•	4						
	PM	Group ID	T	Group Desc	Sequence No	T	Asset Rec #		Asset ID	Desc 1	T Desc 2	T	Category
	12				2		180		121	Blue Valley Park	way		Parks

Schedule your PMs.

- You will use the **Grouped PM Scheduling** Grid to schedule your Grouped PM. You will not use the Schedule fields on the PM/Work Template Form for this type of PM.
- Select the Toolkit option on the Grouped PM Scheduling Grid and select Add New Schedule.
- Determine whether you would like to use a fixed or floating schedule.
  - $\circ$   $\,$  In the example below, we have set up a fixed schedule based on the last start date of the work order.
  - $\circ$   $\;$  We have set a 1-week interval for work order generation.
- Repeat this scheduling process for each park asset in your Grouped Assets grid.

	< ♪	E 🔪 🔹 🌼						
Last Start Date	,	Start Date Interval	Start Interval Code		Next Start Date	Days Ahead		
5/21/2016	<b>m</b>	1	2 Weeks	=	5/28/2016 🛗			
Last End Date		End Date Interval	End Interval Code		Next End Date	Next End Date		
	<b>m</b>				<b>m</b>			
Previous Odometer		Odometer Interval			Next Odometer	Odometer Ahead		
Previous Hourmeter		Hourmeter Interval			Next Hourmeter	Hourmeter Ahead		
Previous Other		Other Interval			Next Other	Other Ahead		
Status			Work Order #		Initiated Date			
					<b>m</b>			


- 4. Create a new PM record, tightly linked to your grouped PM.
  - Enter a unique PM/Template code-description in the header. We've titled this example, "Cut and Trim Park Grass".
  - Select the Scheduled PM checkbox. This distinguishes the PM record from a Work Template.
  - Select the **Grouped PM** checkbox. This allows you to create one PM for multiple assets. It also gives you access to the **Grouped PMs** tab.
  - Select the **Tightly Linked PM** checkbox. This allows you to create a sliding PM schedule. The scheduling grid will be disabled.

PM/Template * CTPG	PM/Template Text * Cut and Trim Park Grass		WO Template X Scheduled PM X Grouped PM	I Inactive
			PM Template Grouped Assets Affected PM	X Tightly Linked PM
Category *		WO	Send to WO Request Comment	
PP	Parks	E		
Problem				
PRKP00	Routine Maintenance	=		
Priority	=			
Main Task				
PRKT101	Mowing and Trimming	=		

- 5. Add your Park assets to the PM.
  - You will use the PM **Groups Grid** to include assets. You will not use the PM Assets Grid for this type of PM.
    - We will use the Toolkit option on the PM Groups grid and select Add Group(s) and Existing Parks Asset(s). You will use the PM Groups Grid to include assets. You will not use the Assets tab for this type of PM.

PM Locations (0) PM Asset	s (0) PM Asset Filter (0)	PM Tasks (0)	PM Checklists (0)	PM Exclusion Days (0)	PM Tracking (0)	Work Orders (0)	PM Greups (3)
🔁 🗐 🗐	• <b>E</b>						
Group Number	First Asset ID	escription	T				

- Load the same Park Assets you used in the previous, scheduled PM.
  - The assets will be added to the PM Grouped Assets grid. Each asset will be given its own unique PM Group ID.
- 6. Schedule your PMs.
  - Select the **PM Grouped PM Tightly Linked PMs** Grid and select the Toolkit Option Add New Affected or Tightly Linked PM.

PML	ocations (0) PM Assets (0)	PM Asset Filter (0)	PM Tasks (0)	PM Checklists (0)	PM Exclusion Days (0)	PM Tracking (0)	Work Orders (0)	PM Groups (3)	PM Tightly Linked PMs (0)	Associated WOs (0)
	🚘 🔳 🗐 🔹	<b>E</b>								
	Group Number Tris	t Asset ID 🛛 🍸 De	scription	T						
-			AHAWK RIDGE							
	Grouped PM Scheduling (0)	PM Grouped Assets	(1) PM Groupe	d PM Exclusion Day	rs (0) PM Grouped PM	Tightly Linked PMs ((	0)			
	👌 🚘 🗔	🗐 • 🔛	÷€ 🔽							C
	Routin Add New Aff	ected or Tightly Link	ed PM		T					

• Select a Routine Code from the Other Affected PMs pick list (**F9**). You should select the Scheduled, Grouped PM (Cut Park Grass) that you just created.

Ro	utine Code *		e <sup>r</sup>	]
	Template Code	Template Type	Rec #	
Þ	CPG	Cut Park Grass	15317	*

- Enter the Number Between PMs that this PM will be generated. Since we want this PM to generate every two weeks and the tightly linked PM is generated every week, we'll set the # Between PMs = 1.
- Set the **# Remaining = 1**, telling the system that this PM will be initiated the second time the Cut Park Grass PM is generated.



- Save and close the record.
- Now, this PM will be tightly linked to our previous PM.
  - The Cut Park Grass PM will be generated on a fixed schedule every week.
- The Cut and Trim Park Grass PM will be tightly linked to the initial PM and will be generated every two weeks.
- Repeat this process for the other Park assets in the PM Grouped PM Tightly Linked PMs Grid.

- 1	2	CTPG	Cut and	Trim Park Grass	Pa	rks	PRK	T101		Mo	wing and Trimming		Routine Mainte	enance
	PM L	ocations (0) PM Asse	ets (0)	PM Asset Filter (0)		Tasks (0) F	M Ch	ecklists (0)	PM Exclu	usion Days (0)	PM Tracking (0)	Wor	k Orders (0)	PM Groups (3)
		🚘 👵 🗊	•	<b>F</b>										
		Group Number	First	Asset ID	Descripti	on	T .							
	÷	1	106		TOMAHA	WK RIDGE								
	÷	2		Blue Valley Parkway										
	-				Fire Statio	in #4			-					
		Grouped PM Scheduli	ing (0)	PM Grouped As	sets (1)	PM Grouped	PM E	xclusion Days	(0) PN	M Grouped PM	Tightly Linked PMs	(1)		
		1	J	<b>[</b> ] • §	in 눩	ę 💌			-					
	Routine Code			# Between PMs	T I	T # Remaining		Routine Text	T					
		📂 CPG			1		1	Cut Park Gra	iss					

- 7. Review the Cut Park Grass PM.
  - On the Grouped PM Scheduling Grid of PM/Template CPG, you will see the new work order.

-		2	CTPG	Cut and Trim Park C	Grass F	arks	PRKT101		Mowing	g and Trimming		Routine Maint	enance	
-	- 1	2	CPG	Cut Park Grass		Parks			Mowing			Routine Maint	enance	
		PML	ocations (3) PM As	sets (0) PM Asset	Filter (0) F	M Tasks (0)	PM Checklists (0)	PM Exclusion Day	s (0) F	0) PM Tracking (0) V		Orders (3)	PM Groups	(3) PM Tight
			🚘 🛛 🕻	] - 🔝										_
			Group Number	First Asset ID	T Descri	ption	T							
		-			TOMAHAWK RIDGE									
			Grouped PM Sched	uling (1) PM Grou	ped Assets (1)	PM Groupe	d PM Exclusion Days	(0) PM Grouped	I PM Tigh	itly Linked PMs ((	))			
			📐 🚘	- 🗐 🗐 -	<b>E</b>	e 💌								
			Group ID	Work Order #	Y Status	Text	ast Start Date	Next Start Date	T	T Last End Date		Next End D	oate 🝸	Previous Odom
	📂 1			18-000253	WO G	enerated	05/28/20	16 06/	04/2016					

• On the CPG Grid, Select the Associated WOs grid. You will see the new work order listed as their separate generation schedules are reached. To view the work orders select the

relationship icon 🚧. Then Select Work Orders ().

- 9. View the generated work order.
  - On the new work order, you will see the Category, Problem, Main Task, and Asset that you chose earlier. You'll also see the Cut Park Grass PM listed on the Related tab.

1										( )				_				
		- 💓	7	- 🥭		Ø			٦		•	<b>F</b>	÷	×				
	Work Order #	T Cat	egory	Problem		T	Main T	ask	Y Pr	iority	T	Reason	T	Lead Work	ker	Y s	Status	
+ 🖻	18-000255	Parl	ks	Routine	Maintena	ance	Mowin	g								N	New Wo	ork Orde
+ 🖻	18-000254	Parl	ks	Routine	Maintena	ance	Mowing	g								N	New Wo	ork Orde
+ 🖻	18-000253	Parl	ks	Routine	Maintena	ance	Mowing	g								N	New Wo	ork Ordei
Nork Order # 18-000253		Status 2 Nev	v Work Order	≡		Status Date 9/7/2018		Status 1 06:48 F	Time PM 0									
anenory				١	Vork Or	der	ent From Re	quest										
PP	Parks				En.			quest										
PRKP00	Routine Maintenance																	
Priority	=																	
Main Task	Maurica																	
Cause	wowing				_	Start D	Date		Start Tim	e								
Supervisor					=	5/30/	2016 🛗		08:00 A	0 N								
						End Da	ate		End Time									
0287	Amado Carroway		≡			End Da	ate 🛍	۲	End Time	0								
0287 Assigned Crew	Amado Carroway		≡		=	End Da Depart PP	tment Parks	•	End Time	0								
0287 Assigned Crew Lead Worker	Amado Carroway		=		=	End D: Depart PP Divisio	ate Imment Parks on	•	End Time	0								
0287 Assigned Crew Lead Worker	Amado Carroway		=		=	End D: Depart PP Divisio	ate ment Parks	•	End Time	0								
0287 Assigned Crew Lead Worker	Amado Carroway	rk Order. if you	E change the va	lues, it will add a	E Locatio	End D: Depart PP Divisio	ate ment Parks	t will contin	End Time	g the first								
0287 Assigned Crew Lead Worker s address is the	Amado Carroway	rk Order. If you Name	E change the va	lues, it will add a	E Locatio	End D: Depart PP Divisio Divisio On on when you Street 1	sate	¥ t will contin	End Time	g the first								
0287 Assigned Crew Lead Worker s address is the System ID 1	Amado Carroway	rk Order. If you Name	E change the va	lues, it will add a	E Locationew location	End D: Depart PP Divisio ON on when you Street	ate ment Parks on Save, then it Name 2	t will contin	End Time	g the first								
0287 Assigned Crew Lead Worker s address is the System ID 1 106	Amado Carroway	rk Order. If you Name	. change the va	lues, it will add a	E Locationew location	End D: Depart PP Divisio Divis	ate ment Parks on Save, then it Name 2	t will contin	End Time	g the first								
0287 Assigned Crew Lead Worker s address is the System ID 1 106	Amado Carroway	rk Order. If you Name Parks	E	lues, it will add a	E Locationew locatione	End Di Depart PP Divisio On on when you Street 106 T 106 T	ate ment Parks on Save, then it Name 2 MOWIN	t will contin K RIDGE	End Time	g the first							New	Work
Assigned Crew Lead Worker s address is the System ID 1 106 Locatio	Amado Carroway	rk Order. If you Name Parks (1) Task	E change the va	Routine N	E Locatio new locatio	End Da Departs PP Divisio On on when you Street 106 T 106 T 106 T	ate ment Parks on Save, then it Name 2 Mowing S (0)	t will contin K RIDGE g Tracking	End Time	ig the first	ırk Te	mplates (	1) V	Vork Orders	÷ (0)		New	Work
0287 Issigned Crew ead Worker a address is the system ID 1 106 Locatio	Amado Carroway	rk Order. If you Name Parks (1) Task	E change the va	Routine N hecklist (0)	E Locatic new locatic	End Di Depart PP Divisio on when you Street 106 T 106 T	ate ment Parks on Save, then it Name 2 Mowin, S (0)	x will contin K RIDGE 9 Trackin	End Time	g the first	ırk Te	mplates (	1)	Vork Orders	; (0)		New	Work
0287 Assigned Crew Lead Worker s address is the s address is the United States System ID 1 106	Amado Carroway	rk Order. If you Name Parks (1) Task	s (0) C	Routine N Rocklist (0)	E Locationew locatione	End Di Depart PP Divisio on when you Street 106 T 106 T Comment	s (0) Mowin: Save, then it Name 2 Mowin: S (0) Task	t will continue     K RIDGE	End Time	© g the first PM/WG	rk Te	nplates ( 1/ain Task	<del>1)</del> V	Vork Orders	; (0)		New	Work WO N

10. Close the work order. Enter an end date and status of "999-Complete".

• This allows a second Cut Park Grass PM to be generated.

• Due to the numbers we set up earlier, the Cut and Trim Park Grass PM will also be generated at this time.

Notes:\_

11. Review the first PM (Cut Park Grass).

• The Associated WOs Grid will have two listings. The first will be the work order you just completed. It will have the mowing task only. The second will be a new work order. It will contain tasks for both mowing and trimming.

		Work Orde	er#	T	Category	T	Probler	n	Ma	in Tas	k	T	Priority	( <u> </u>	Reason	T	Lea	d Worker	i
-	6	18-000256			Parks		Routine	e Maintenance	Mc	wing a	and Trim	ming							
	Loca	ations (3)	Assets	(1)	Tasks (0)	Ch	ecklist ((	)) WO Commer	ıts (0)	Tra	acking (8	) PM/W	ork Tem	plates (2)	Work	Orders	(0)		l
	1				•	-	ó	1 🗖 🗖	Ē	•	<b>P</b>								
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	СТР	G	(	Cut a	nd Trim Park	Gras	s	Parks	PRK	T101				Mowing	and Trimi	ming		Routine Mainte	3I
	CPG	)	(	Cut P	ark Grass			Parks	PRK	T47				Mowing	ļ			Routine Mainte	a

12. Review the second PM (Cut and Trim Park Grass).

• The Related WOs tab will have only one listing. It will display the new work order with both tasks (mowing and trimming).

-	6	CTPG	Cut and Trim F	Park Grass				owing and Trimming	Routine Mainte				
	PMI	Locations (3)	PM Assets (0) PM	Asset Filter (0)	PM Tasks (0)	PM Checklists (0)	PM Exclusion Days (0)	PM Tracking (0)	Work Orders (1)	PM Groups (3)	PM Tightly Link	ed PMs (0) As	sociated WOs (1)
		5	] -										
Г	Asso	ciated PM	Associated PM Te	ext T C	Closed PM	Link To PM Schedu	ling 🍸 Link to F	Ms T Link To V	Vork Order				
L	CTPG		Cut and Trim Park	Grass	2		15318	18523					

13. View the new work order.

• On the CTPG Grid, Select the Associated WOs grid. You will see the new work order listed as their separate generation schedules are reached. To view the work orders select the

relationship icon 🤽 . Then Select Work Orders ().

- On the Work Order's Related tab, you will see both associated PMs.
- 14. Close the work order as before, allowing the system to generate additional PMs

-	18-000256		Parks	Rout	Routine Maintenance			Mowing and Trimming								Comple	
	Locations (3) Assets (1)		) Tasks (0)	st (0)	0) WO Comments		(0) Tracking (8)		3) PM/W	PM/Work Temp		Work Orders	; (0)				
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	PM/	Template	T PM	/Template Text	1	Cate	egory 📉	Main	Task	T	Account #	T	Main Tas	sk	T	Problem	T
	CTPG 0		Cut	Cut and Trim Park Grass			<s< td=""><td>PRKT</td><td colspan="2">T101</td><td></td><td></td><td>Mowing</td><td>and Trimming</td><td></td><td>Routine Maintenan</td><td>ce</td></s<>	PRKT	T101				Mowing	and Trimming		Routine Maintenan	ce
	CPG		Cut	Cut Park Grass		Park	Parks F		47				Mowing			Routine Maintenan	ce