

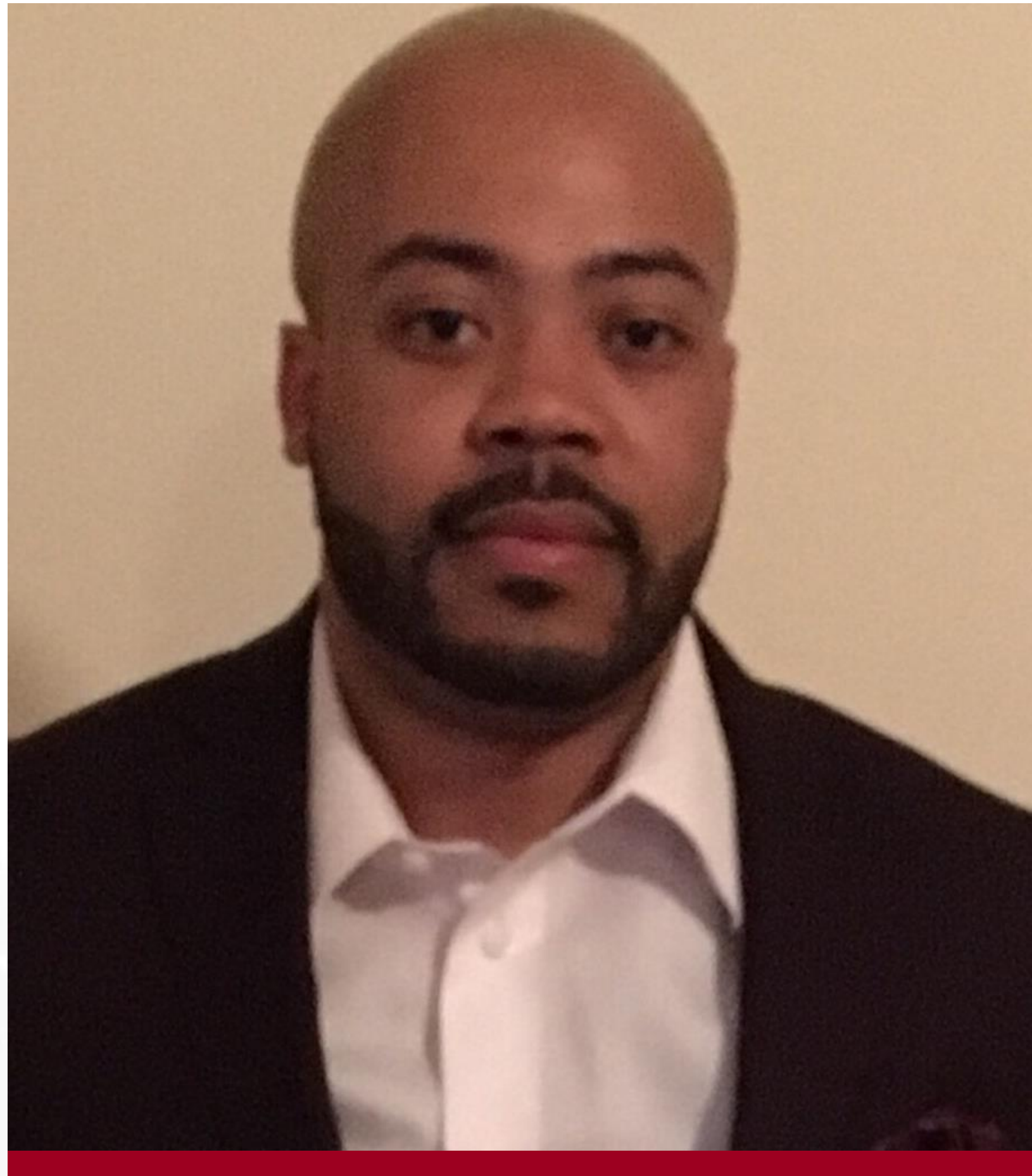


Preventive Maintenance Planning: Projecting Your Resource Needs

Presented By: Aaron Davis



Meet Aaron Davis



About Aaron

Worked for AssetWorks for about 3 years. A proud Buckeye, graduating from The Ohio State University with a BA in Spanish and International Studies and a MA degree in Public Policy and Management. He has 12 years of experience working for facilities maintenance departments as a systems manager and a work control call center. Aaron loves to travel for leisure and has traveled to over 15 different countries.

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Preventive Maintenance Planning: Projecting Your Resource Needs

- Preventive Maintenance is a primary focus for all facility maintenance organizations. Setting up an effective PM program in a computerized system is easier said than done and is the challenge.
- This session will focus on the proper setup and configuration required in the AiM Preventive Maintenance Module to effectively project labor and material costs for future months, quarters and years.
- We will look through the Preventive Maintenance Module in AiM and go over the configurations step by step so that we can garner a better understanding of the design intent of the PM Module in AiM.

Taking a look at the AiM iQ Gears

Business Intelligence Reporting

PM Standards

PM Task List contains the estimates that will carry over to the PM Template .

Reports

Reports can be created using BIRT and AiM iQ .



PM Templates

PM Template Screen sets up the details and schedules for PM work orders generated by AiM.

PM Materials

Users can load materials that are required for the PM, as well as, provide the mechanism for requesting those materials.

PM Standards

PM Standards

AiM

PM Standards

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Related Documents

AC-QT

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QUARTERLY AIR CONDITIONER PM

Active

Yes

Reference

Frequency

QUARTERLY

4X PER YEAR

Labor Hours

2.60

Labor

\$85.02

Material

\$50.00

Equipment

\$0.00

Contract

\$0.00

Total

\$135.02

Checkpoints

Checkpoint	Description	Estimated Labor Hours	Measurement	Active
01	CHECK UNIT FOR PROPER OPERATION, EXCESSIVE NOISE	0.30	No	Yes
02	LUBRICATE SHAFT BEARINGS AND MOTOR BEARINGS	0.50	No	Yes
03	INSPECT FAN(S) OR BLOWER(S) FOR BENT BLADES OR IMBALANCE	0.10	No	Yes
04	INSPECT PIPING AND VALVES FOR LEAKS	0.10	No	Yes
05	FILL OUT MAINTENANCE PM REQUEST	0.50	No	Yes

PM Standard Header

- *Input Estimated (Labor Hrs, Labor Cost, Material Cost, Contract Cost)*
- *Checkpoints (drill in to add estimated labor hours by checkpoint) or use one checkpoint to input total estimated labor hours.*

PM Standards

PM Standard Checkpoint

- *Input estimated labor hours by individual checkpoint or use one checkpoint to input total estimated labor hours.*

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Checkpoints

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Extra Description

01

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CHECK UNIT FOR PROPER OPERATION, EXCESSIVE NOISE

Sequence Required

No

Field Type

Field Length

Decimal Precision

Estimated Labor Hours

0.30

Measurement

No

Active

Yes

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PM Standards

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PM Standards

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E109533619505

Last Edited by On 02/27/2017 06:05 AM

Drink cooler with external condenser

Labor Hours

1.38

Labor

\$122.00

Material

\$33.00

Equipment

\$0.00

Contract

Total

\$155.00

Checkpoints

Checkpoint	Description	Estimated Labor Hours	Measurement	Active
001	Check with operating or area personnel for deficiencies.	0.04	No	Yes
002	Clean condenser coils, fans, and intake screens; lubricate motor.	0.50	No	Yes
003	Inspect door gaskets for damage and proper fit; adjust as necessary.	0.03	No	Yes
004	Check starter panels and controls for proper operation, burned or loose contacts, and loose connections.	0.09	No	Yes
005	Clean coils, evaporator drain pan, blowers, fans, motors and drain piping as required; lubricate motor(s).	0.47	No	Yes
006	During operation of unit, check refrigerant pressures and compressor oil level; add refrigerant and/or oil as necessary.	0.07	No	Yes
007	Check operation of low pressure cut-out; adjust or replace as necessary.	0.06	No	Yes
008	Inspect defrost systems for proper operation; adjust as required.	0.03	No	Yes
009	Clean area around equipment.	0.07	No	Yes

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RS Means

- A standard construction cost and estimating database.
- RS Means can be loaded into AiM
- RS Means Data can be purchased from AssetWorks with easy uploading for estimating and PM Tasks.

PM Template

PM Template

Template Phase

- *Estimated Checkpoint hours and cost from PM standard carries over.*
- *Estimated Hours can be adjusted on the template.*
- *Estimated Hours and Cost will carry over to pm work order and phase upon generation*

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Template Phase

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User Defined Fields

001

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QUARTERLY PACKAGED AIR CONDITIONER PM

Template

1059

PM Standards

AC-QT

QUARTERLY AIR CONDITIONER PM

Checkpoint Hours

2.6

Hours Adjustment

0

Total Hours

2.6

Estimated Cost

\$135.02

Funding Method

Asset

Priority

ROUTINE

Work Code

AIR CONDITIONER

Status

OPEN

Nested Status

Shop

WC14

HVAC MAINTENANCE

Primary Person

OAKLEY_R

ROBERT OAKLEY

Request Method

Inspection Type

Inspection Status

Contractor

Address Code

Service Contract

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PM Material

PM Template Material

AiM

PM Materials

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DoneCancel

2

Last Edited by CRICKET MANJARREZ On 04/11/2012 05:54 AM

Asset GroupACU

AssetAC2-814-20TH-ST-RF

Pick Ticket Generate StatusOPEN

Purchase Request Generate StatusOPEN

PM Materials

RemoveAdd

Line	Description	Contractor	Vendor Part	Warehouse	Part	Kit	Quantity	Generation Flag
1	COMPRESSION CONNECTOR, 1 IN, STEEL	115636	5XC20				1	Purchase Request
2	24x24x2 inch paper filter			SU	RW1000		1	Pick Ticket

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PM Materials

- Add materials to each asset on PM Template to help plan and procure parts.
- Once PM is generated a purchase request and/or a pick ticket will be generated in a designated status.

PM Template

PM Material – Pick Ticket/Purchase Request

- *This example show how to add a non-stock part .*
- *Contractor, Address Code and Vendor Part will be needed.*
- *Generation Flag will flag system to ‘Do not generate’, Purchase Request or Pick Ticket.*
- *Quantity is also needed.*

AiM Pick Ticket/Purchase Request ROOT About Logout

Done Add Cancel

1 Last Edited by ROOT On 04/03/2019 01:34 AM

Generation Flag **Purchase Request** ▼

Quantity

Template 1059

Phase 001

Sequence 2

Asset Group ACU

Asset AC2-814-20TH-ST-RF

AIR CONDITIONER

Contractor

W W GRAINGER INC

Address Code

Vendor Part

COMPRESSION CONNECTOR, 1 IN, STEEL

Warehouse

Inventory Part

Kit

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PM Template

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Pick Ticket/Purchase Request

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DoneAddCancel

1

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Template1059

Phase001

Sequence2

Asset GroupACU

AssetAC2-814-20TH-ST-RF

AIR CONDITIONER

Contractor

Address Code01

Vendor Part

WarehouseSU

Inventory PartRW1000

Kit

Generation FlagPick Ticket

Quantity1

SUPPORT WAREHOUSE

24x24x2 inch paper filter

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PM Material – Pick Ticket/Purchase Request

- This example show how to add a stock part .
- Warehouse, Inventory Part or Kit will be needed.
- Generation Flag will flag system to ‘Do not generate’, Purchase Request or Pick Ticket.
- Quantity is also needed.

Additional PM Template Areas

PM Template

Template Asset – Projected Dates

- In order to create a PM Work Order a PM Template must have Projected Dates*
- Projected Dates are generated based off a projection end date*
- This screen will displays the projected dates that the PM should come out based on it frequency.*
- It will also flag yes if it has been generated.*

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Template Asset

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DoneCancel

Projected Dates

Date	Generated
Jul 01, 2011	Yes
Oct 03, 2011	Yes
Apr 02, 2012	Yes
Jul 02, 2012	No
Oct 01, 2012	No
Apr 01, 2013	No
Jul 01, 2013	No
Oct 01, 2013	No
Apr 01, 2014	No
Jul 01, 2014	No
Oct 01, 2014	No
Apr 01, 2015	No
Jul 01, 2015	No
Oct 01, 2015	No

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PM Template

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Template Phase

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Action	001Last Edited by ROOT On 04/03/2019 02:06 AM				Template	1059
Email	QUARTERLY PACKAGED AIR CONDITIONER PM					
View						
Green Initiative						
Notes Log						
User Defined Fields						
PM Standards	AC-QT	Checkpoint Hours	2.6	Inspection Type		
		Hours Adjustment	0			
	QUARTERLY AIR CONDITIONER PM	Total Hours	2.6	Inspection Status		
		Estimated Cost	\$135.02			
Funding Method	Asset	Shop	WC14	Contractor	243713	
Priority	ROUTINE		HVAC MAINTENANCE		KELLY HVAC INC	
	ROUTINE	Primary Person	OAKLEY_R	Address Code	01	
Work Code	AIR CONDITIONER		ROBERT OAKLEY	Service Contract	2016-003478	
	AIR CONDITIONER	Request Method			KELLY HVAC INC - FY2019 CONTRACT	
Status	OPEN				KELLY HVAC INC - FY2019 CONTRACT	
Nested Status						

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Template Phase – Contractor/Service Contract

- A contractor and service contract can be added to the template phase.

PM Work Order

Work Order – Cost Analysis


- *The estimated cost and hours from PM Template carried down to work order.*
- *The actual and estimated values can be compared here.*

AiM
Work Order - Cost Analysis
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12-074296 QUARTERLY PACKAGED AIR CONDITIONERS	Created By CRICKET MANJARREZ On 04/11/2012 05:54 AM Last Edited by CRICKET MANJARREZ On 07/18/2012 11:46 AM	<div>Budget \$0.00</div> <div>Enforce Budget</div>
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Subledger	Labor Hours	Labor Cost	Material Cost	Equipment Cost	Contract Cost	Total Cost
Estimate	2.60	\$85.02	\$50.00	\$0.00	\$0.00	\$135.02
Actual	1.10	\$35.97	\$0.00	\$0.00	\$0.00	\$35.97
Encumbered		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Billed		\$35.97	\$0.00	\$0.00	\$0.00	\$35.97



Reporting

Reporting

- Some canned reports that demonstrate estimates vs actuals.
 - 421 - Work Order Estimate vs Actual
 - 422 - Phase Estimate vs Actual Cost
 - 423 - Phase Estimate Detail
 - 425 - Work Order Estimate Level Summary
 - 426 – Work Order Estimate Level Detail
 - 427 - Phase Estimate Summary
- Custom report ideas:
 - PM Schedule Report
 - PM Estimated vs Actual Deviation
 - PM Schedule Compliance
 - PM Materials Ordered
 - Contractor PM Schedule

Questions...



Wrap Up

Questions...



Thank You!

Aaron Davis, Project Manager

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