Setup a PM Standard

A PM Standard is used to define a series of checkpoints or maintenance steps required to perform preventive maintenance procedures. PM activities vary based on an asset and can be designed by Facilities Management Services Shop Leads or selected from the AiM RS Means Electronic Book (*if available*).
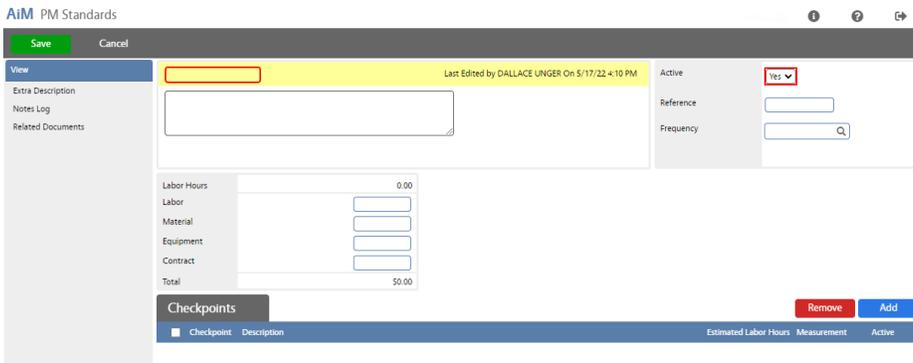
Create a New PM Standard

1. From the menu, under **Preventive Maintenance**, select **PM Standards**

2. Click the PM Standard hyperlink and then click:

   a. Alternatively, you can click ➕ from the menu.

3. Enter data into the following fields:
   a. **PM Standards**
      - Enter the PM Standard number
   b. **Description**
   c. **Reference**
   d. **Frequency** – Click: 🔍 and select from the list.
   e. **Labor, Material, Equipment and Contract** – Optional, enter dollar amounts for any of these.

> **Commented [CP1]:** Reference = what is reference

The Checkpoint detail of the screen is used to associate all the specific tasks or maintenance steps to the PM standard.

4. To add checkpoints, complete the screen and then click either **Add** or **Done**

   a. **Checkpoint**   Alpha-numeric (15 characters)

   > **Commented [CP2]:** Checkpoint add total labor hours on the first check point only

   Note: In AiM, the Checkpoints are displayed in alphabetic or numeric order. Consecutive numbering with leading zeroes ('010', '020', '030', etc.) is recommended. In the event that you need to add missing steps, you can add, for example, a '015' to fall in between the existing steps, '010' and '020'.

   b. **Description**   Add each item from maintenance checklist

   c. **Estimated Labor Hours** Enter units of time to complete checkpoint

   d. **Active**   Yes to use the checkpoint

   e. To require a reading or entry on the checkpoint, complete the following (changing **Measurement** to **Yes** will change the other fields to being required):

      i. **Measurement**   Yes

      ii. **Sequence**   Numeric. Affects the order of the checkpoints in Go. Increase by 10's (*10,20,30, etc. – order of appearance*)

      iii. **Required**:   Select No or Yes (*forces the Tech to enter a measurement or note before the Work Order status can be set to Work Complete*)

      iv. **Field Type**   Choose from - String (*alpha numeric*) / Date / Number

      v. **Field Length**   Can be set to a maximum 60 characters

      vi. **Decimal Precision** Number of decimals allowed

   f. Click: **Add** to add another Checkpoint

5. Repeat steps a through f for all maintenance checkpoints.

6. Click: **Done** when all Checkpoints have been created.

7. Click: **Save** After saving, total labor estimates will automatically calculate.

Copy an existing PM Standard

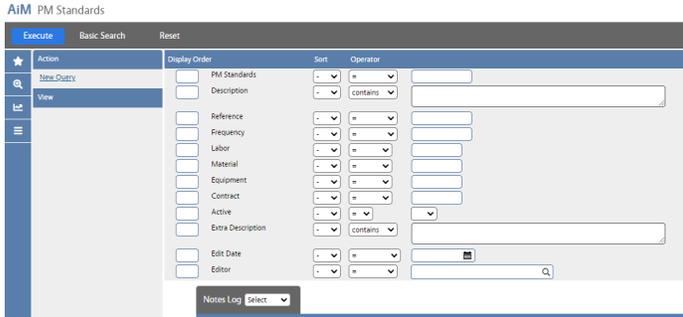In some cases, it might be easier to copy and existing PM Standard instead of creating it from scratch.

1. Find the existing PM Standard. From the menu click: 🔍

Or from the PM Standard screen click: **Search**

2. On the Search screen enter the criteria to find the PM Standard you want to copy.

3. Click: **Execute**

4. Select the PM Standard by clicking on the PM Standard hyperlink.

5. Click the **Copy** hyperlink.
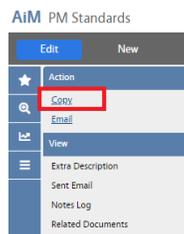
6. You will be asked what you want to name the new PM Standard and if you wish to copy certain data elements. All other parts of the PM Standard will be copied over, but you can remove or update them.

7. Go to Step 3 of the **Create a New PM Standard** process above to finish creating this PM Standard.