

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).

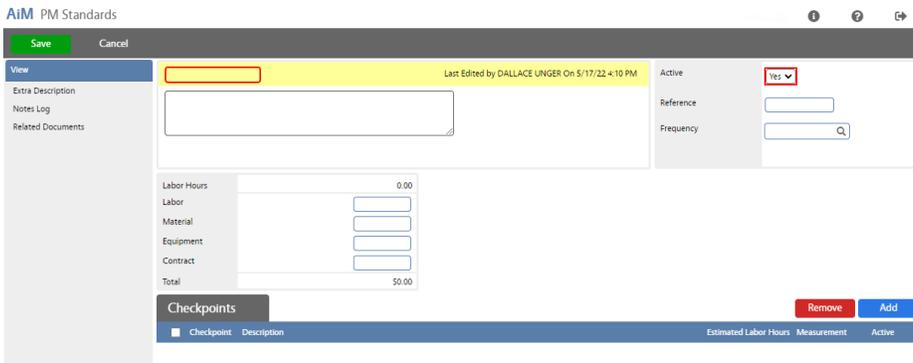
Create a New PM Standard

- From the menu, under **Preventive Maintenance**, select **PM Standards**



- Click the PM Standard hyperlink and then click: 

a. Alternatively, you can click  from the menu.



- Enter data into the following fields:

- PM Standards**
 - Enter the PM Standard number
- Description**
- Reference**
- Frequency** – Click:  and select from the list.
- 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.

The screenshot shows the 'AiM Checkpoints' interface. At the top, there are buttons for 'Done', 'Add', and 'Cancel'. Below this is a header bar with 'View' and 'Extra Description' tabs. The main form area contains several fields: a text input for 'View', a text input for 'Extra Description', a 'Sequence' field with a numeric input, a 'Required' dropdown menu currently set to 'No', a 'Field Type' dropdown menu, a 'Field Length' numeric input, and a 'Decimal Precision' numeric input. On the right side, there is an 'Estimated Labor Hours' field with a numeric input set to '0.00', a 'Measurement' dropdown menu set to 'No', and an 'Active' dropdown menu set to 'Yes'. At the bottom of the form, there are 'Add' and 'Done' buttons.

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

- a. **Checkpoint** Alpha-numeric (15 characters)
 - 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: to add another Checkpoint

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

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

The screenshot shows the 'AIM PM Standards' interface. The main header displays 'PM-AHU_MD_TEST' with a 'Last Edited by SCOTT LLOYD On: 10/16/22 1:48 PM' and 'Active: Yes'. Below this, there are sections for 'Labor Hours', 'Labor', 'Material', 'Equipment', 'Contract', and 'Total', all showing '0.00'. A red box highlights a table of checkpoints.

Checkpoint	Description	Estimated Labor Hours	Measurement	Active
010	EQUIPMENT INFORMATION VERIFICATION CHECK FOR TAG ON UNIT; REPORT IF MISSING; REVIEW EQ INFORMATION (MODEL, LOCATION, ETC); IF ANY INFORMATION NEEDS UPDATED, PLEASE REPORT IF EQUIPMENT IS NO LONGER IN USE AND NEEDS REMOVED FROM PM; PLEASE REPORT.	0.00	No	Yes
020	CHECK CAD	0.00	No	Yes
030	CHECK 5V STS	0.00	No	Yes
040	CHECK BELT SPANS	0.00	No	Yes
050	CHECK CUMP PMP	0.00	No	Yes
060	CHECK CONTROLLER	0.00	No	Yes
070	CHECK AND TIGHTEN ALL CONTROLLER TERMINATIONS	0.00	No	Yes
080	CHECK AND TIGHTEN ALL CONNECTIONS TO DAMPER/JACK SHAFT FOR ALL OUTSIDE, RETURN, AND RELIEF DAMPERS ASSOCIATED WITH THE UNIT	0.00	No	Yes
090	VERIFY THAT ALL OF THE ASSOCIATED DAMPERS STROKE OPEN AND CLOSED AND LIST ANY DEFICIENCIES DISCOVERED	0.00	No	Yes
100	CHECK AND VERIFY STATUS SIGNALS FOR ALL SUPPLY/RETURN FANS AND LIST ANY DEFICIENCIES DISCOVERED	0.00	No	Yes
110	CHECK OPERATION AND CONDITION OF BELT/FAN MOTOR AND LIST ANY DEFICIENCIES DISCOVERED.	0.00	No	Yes
120	VERIFY THAT THE EXHAUST PUMP IS FULL AND FREE OF DEBRIS AND THAT THE ASSOCIATED FILL VALVE IS FUNCTIONAL.	0.00	No	Yes
130	CHECK CONDITION OF CELL DECK MEDIA FOR DAMAGE AND CREATE WORK ORDER IF NECESSARY.	0.00	No	Yes
140	VERIFY OPERATION AND STATUS OF DIRECT EVAPORATIVE COOLER PUMPS; AND LIST ANY DEFICIENCIES DISCOVERED	0.00	No	Yes
150	VERIFY EVEN DISTRIBUTION OF WATER ACROSS THE CELL DECK AND CREATE WORK ORDER IF NECESSARY	0.00	No	Yes
160	CHECK CONDENSATE PANS FOR CLEANLINESS, CLEAN IF NECESSARY	0.00	No	Yes
170	CHECK OVERALL CLEANLINESS OF UNIT; CLEAN IF NECESSARY	0.00	No	Yes
180	CHECK AIR FILTER CLEANLINESS; NOTIFY SUPERVISOR IF FILTER NEEDS CHANGED	0.00	No	Yes

6. Click:  when all Checkpoints have been created.

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

Copy an existing PM Standard

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

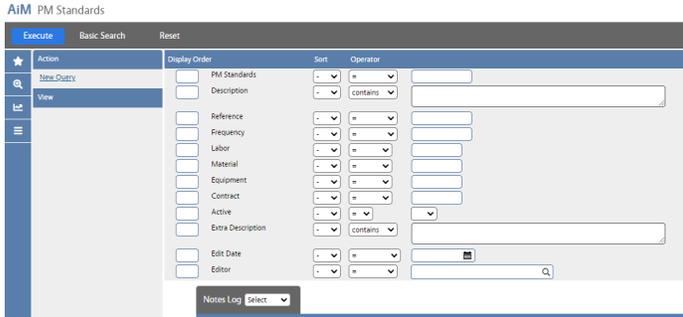
1. Find the existing PM Standard. From the menu click: 

The screenshot shows a vertical menu with the following items: 'Preventive Maintenance', '+ PM Template', '+ PM Generator', '+ PM Meter Reading', 'Rapid Meter Reading', '+ PM Standards' (highlighted with a red box), and 'PM Schedule Date Generator'.

Or from the PM Standard screen click: 

The screenshot shows the 'AIM PM Standards' search screen with three buttons: 'New', 'Search', and 'Browse'.

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

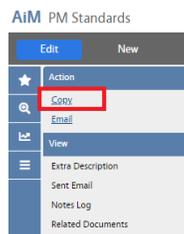


3. Click: **Execute**
4. Select the PM Standard by clicking on the PM Standard hyperlink.

AiM PM Standards

Search		New	
Action	PM Standards #	Frequency	Description
Export	PM0001.01.00.00	YEARLY	DOUBLE CHECK VALVE, <2 INCH - ANNUAL
View	PM0002.01.00.00	YEARLY	DOUBLE CHECK VALVE, 2 INCH - <6 INCH - ANNUAL
	PM0003.01.00.00	YEARLY	DOUBLE CHECK VALVE, >=6 INCH - ANNUAL
	PM0004.01.00.00	YEARLY	BACKFLOW PREVENTER, <2 INCH - ANNUAL
	PM0005.01.00.00	YEARLY	BACKFLOW PREVENTER, 2 INCH - <6 INCH - ANNUAL

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.

AiM Copy PM Standards

Next Cancel

Property

PM Standards

PM Standards

Extra Description

Related Documents

Detail (Applies to All Details Copied)

Extra Description

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