

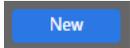
## Setup a PM Template

The PM Template Screen sets up the details and schedules for PM Work Orders generated by AiM. PM Templates are referenced by the PM Generator to automatically create PM work orders.

### Create a New PM Template

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



- Click the PM Template hyperlink and then click: 

- Alternatively, you can click  from the menu.

 A screenshot of the "AiM PM Template" form. The form has a header with "Save" and "Cancel" buttons. Below the header is a sidebar with navigation options: "View", "Extra Description", "Seasonality", "Account Setup", "Notes Log", "User Defined Fields", and "Related Documents". The main form area contains several input fields: "ID" (1016), "Active" (Yes), "Project", "Projection End Date", "Dept", "Requestor", "Contact", "Phone", "Email", "Problem Code", "Type", "Category", "Status", "Nested Status", "Job Priority", "Work Order Grouping" (Property By Template), "Type" (Fixed), "Frequency", "Parent Template", and "Generation Buffer". A "Template Phase" table is at the bottom with columns: Phase, Description, Shop, Contractor, Work Code, Priority, and PM Standards. "Remove" and "Add" buttons are next to the table.

- Data enter on this screen will be used to create the PM Work Order. Enter data for the following fields:
  - Enter a **Description** of the PM.
  - Enter **Type**, **Category** and **Status**.
  - Select the **Work Order Grouping**.

 A screenshot of a dropdown menu for "Work Order Grouping". The menu is open, showing two options: "Property By Template" (which is selected with a checkmark) and "Asset By Template".

- Property by Template** groups all assets of a single type from the same property onto one work order.
  - WO: Building**
    - Phase: Asset 1**

- Phase: Asset 2
- Phase: Asset 3
- ii. **Asset by Template** creates a single PM work order for one asset but potentially with multiple phases, each assigned to a different shop or contractor.
  - **WO: Asset**
    - Phase: Shop 1
    - Phase: Shop 2
    - Phase: Shop 3

d. Select the **Type** and if needed, select the **Frequency**.

4. Now enter the Template Phase. These will create the Phases on the PM Work Order.

Click: Add

a. On the Template Phase screen add the following data.

**AiM Template Phase** (Last Edited by DALLACE UNGER On 5/17/22 5:34 PM) | Template: 1017

**001**

Notes Log  
User Defined Fields

PM Standards: [Search] | Checkpoint Hours: 0 | Hours Adjustment: 0 | Total Hours: 0 | Estimated Cost: \$0.00 | Inspection Type: [Search] | Inspection Status: [Search]

Funding Method: Property | Shop: [Search] | Contractor: [Search]

Priority: [Search] | Primary Person: [Search] | Address Code: [Search]

Work Code: [Search] | Request Method: [Search] | Service Contract: [Search]

Status: [Search] | Last Date Default: [Calendar]

Nested Status: [Search]

**Shop Person** [Remove]

Shop Person	Name	Primary
[Add]		

**Template Asset** [Remove] [Load Equipment] [Load Asset]

Sequence	Equipment	Asset	Shop	Contractor	Hold	Last Date
[Add]						

- i. **Description**
- ii. **PM Standard** – Use the 🔍 to search for the Standard is not known.
- iii. **Priority, Work Code and Status.**
- iv. Select **Shop** responsible for completing the PM if know.
- v. Select the **Last Date Default**. This date is based on the last time the PM was completed.  
**This defaulted Last Date may be overwritten on any template asset line item.**

**AiM Template Phase** (Last Edited by MICHAEL KEELIN On 9/7/22 10:31 AM) | Template: 1006

**001**

Notes Log  
User Defined Fields

WEEKLY CHILLER INSPECTION

PM Standards: PM000029 | Checkpoint Hours: 0 | Hours Adjustment: 0 | Total Hours: 0 | Estimated Cost: \$0.00 | Inspection Type: [Search] | Inspection Status: [Search]

WEEKLY CHILLER INSPECTION

Funding Method: Asset | Shop: HVAC | Contractor: [Search]

Priority: 3 | Primary Person: HVAC | Address Code: [Search]

Work Code: INSPECTION - RESPONSE S WORKING DAYS - INSPECTION | Request Method: [Search] | Service Contract: [Search]

Status: NEW | Last Date Default: [Calendar]

Nested Status: [Search]

**Shop Person** [Remove] [Load]

Shop Person	Name	Primary
[Add]		

**Template Asset** [Remove] [Load Equipment] [Load Asset]

Sequence	Equipment	Asset	Shop	Contractor	Hold	Last Date
[Add]						

- b. If the PM is to be assigned to a specific person, once the Shop has been selected, a Shop Person can be added to the Template Phase.
- c. To add Assets to the Template Asset, click: 



- d. From the Search screen, enter the criteria necessary to find the Assets you need to add to the Template Phase. Click: 

### AiM Load Asset



The screenshot shows the 'AiM Load Asset' search interface. It has a top bar with 'Execute', 'Advanced Search', and 'Reset' buttons. Below is a search criteria table:

Field	Operator	Value
Asset	=	
Description	contains	
Asset Type	=	SERIALIZED
Asset Group	=	CHILLER
Meter Type	=	

- e. You will get a list of Assets that meet your criteria.

### AiM Load Asset



The screenshot shows the search results table for 'AiM Load Asset'. The table has columns for Asset, Description, Region, Facility, Property, Location, Asset Group, Asset Type, and Status. The user 'SCOTT' is logged in.

Asset	Description	Region	Facility	Property	Location	Asset Group	Asset Type	Status
<input type="checkbox"/> EQ050007	CHILLER #1	UCB	MAIN CAMP	208	03	CHILLER	SERIALIZED	ACTIVE
<input type="checkbox"/> EQ050008	CHILLER #1	UCB	MAIN CAMP	207	C274	CHILLER	SERIALIZED	ACTIVE

- f. If you want all the Assets, click in the checkbox at the top on the lefthand side. Otherwise, scroll through the list and click in the checkbox next to the Assets you do want.
- g. Click: 

Notes Log  
User Defined Fields

WEEKLY CHILLER INSPECTION

PM Standards: PM000029

Checkpoint Hours: 0  
Hours Adjustment: 0  
Total Hours: 0  
Estimated Cost: \$0.00

Inspection Type: [Search]  
Inspection Status: [Search]

Funding Method: Asset  
Priority: 3  
Work Code: INSPECTION  
Status: NEW  
Nested Status: [Search]

Shop: HVAC  
Primary Person: HVAC  
Request Method: [Search]

Contractor: [Search]  
Address Code: [Search]  
Service Contract: [Search]

Last Date Default: [Calendar]

**Shop Person** [Remove] [Load]

Shop Person	Name	Primary
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**Template Asset** [Remove] [Load Equipment] [Load Asset]

Sequence	Equipment	Asset	Shop	Contractor	Hold	Last Date
3		EQ050007			No	Oct 12, 2022
4		EQ050008			No	Oct 12, 2022

- h. If you are done with the Template Phase, click: 
- i. From the **PM Template** screen, click: 