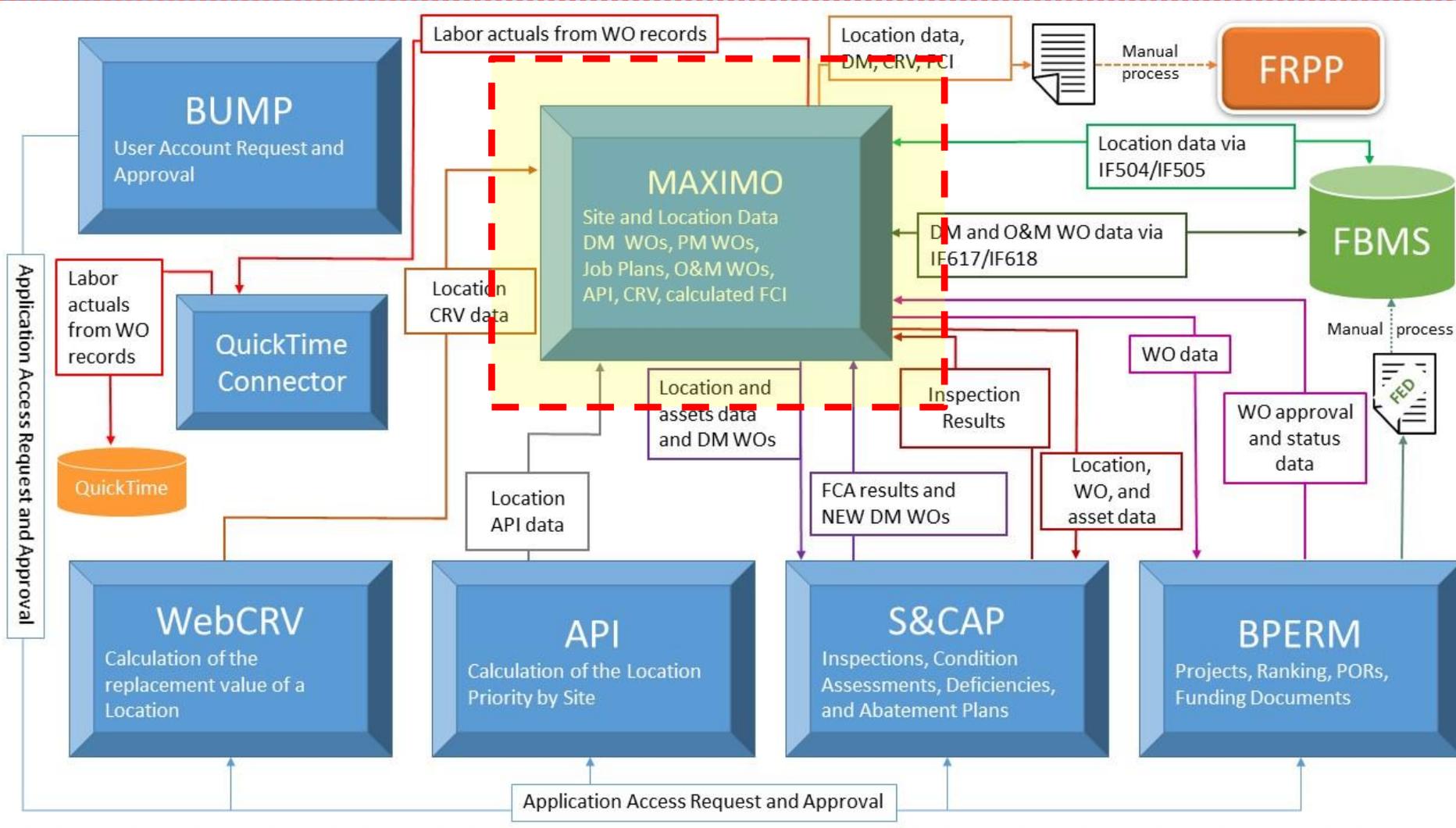


Indian Affairs, Division of Facilities  
Management and Construction

# Indian Affairs-Facility Management System (IA-FMS) Training

**Preventive Maintenance (PM's)**

# IA-FMS Overview



# Lesson goals

- This lesson will cover the following specifics within IA-FMS (Maximo) Preventative Maintenance (PM) application:
  - Describe the PM application and its uses.
  - Understand the relationship between PM records and Job Plans.
  - Create PM records.
  - Attaching a Job Plan to a Work Order.
  - Generate Work Orders from PM Records.
  - Duplicate a PM Record.

# PM Work Orders – Overview

- Work that occurs on any repetitive schedule can be captured in the PM application.
- In IA-FMS PM records are templates for work orders.
- A PM Record is established for a single asset record or location and should be on a fixed schedule (monthly, semi-annual, and annual).
- Job Plans can be sequenced, which allows IA-FMS to assign the correct job plan each time a work order is generated.
- The work orders generated from a PM should be 'CLOSED' as soon as the work is accomplished and documented.

# PM Tabs – List Tab

IA Preventive Maintenance

Bulletins: (3) [Go To](#) [Reports](#) [Start Center](#) [Profile](#) [Sign Out](#) [Help](#)

Find:  Select Action

List PM Frequency Seasonal Dates Job Plan Sequence PM Hierarchy

Advanced Search  Save Query  Bookmarks

PMs  Filter  0 - 0 of 0

PM	Description	Structure #	Maximo ID	Asset	Priority	Site
<input type="text"/>	=JS004					

To find records, use the filter fields and then press Enter.  
For more search options, use the Advanced Search button.  
To enter a new record, select the Insert icon in the toolbar.

All the fields boxed in **RED** are searchable. Or to retrieve all records place your cursor in the 'PM' (first box) and hit Enter on your keyboard.

# PM Tabs – Creating a PM

The screenshot shows the IA-FMS software interface for creating a PM record. The interface is divided into several sections:

- Top Navigation Bar:** Contains a search bar, a 'Select Action' dropdown, and a 'New PM' icon (callout 1).
- Main Form Area:** Contains fields for PM No. (callout 2), Description (callout 3), Asset (callout 4), and Maximo ID (callout 4).
- Details Section:** Contains fields for Job Plan (callout 5), Work Type (callout 6), Work Order Status (WWSCH), Priority, and Interruptible? checkbox.
- Responsibility Section:** Contains fields for Supervisor, Crew, Lead, Work Group, Owner, and Owner Group.
- Right Side:** Contains 'Override Updates from Master PM?' checkbox, 'Status: DRAFT', and 'Attachments' link.

1. Click on the 'New PM' icon.
2. IA-FMS will automatically the PM No.
3. Enter the PM 'Description'
4. Enter the 'Asset' OR 'Maximo ID'

5. Enter 'Job Plan' (if necessary).
6. Enter 'Work Type'
7. 'Save' the record.

# PM Tabs – Frequency Tab

Preventive Maintenance Bulletins: (1) [Go To](#) [Reports](#) [Start Center](#) [Profile](#) [Sign Out](#) [Help](#)

BMXAA4205I - Record has been saved.

Find:  Select Action # Save Undo Redo Refresh Print

List PM **Frequency** Seasonal Dates Job Plan Sequence PM Hierarchy Forecast

PM: AB1374 \* Fire Alarm Test Site: IA004 Status: DRAFT Forecast Exists?

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**Work Order Generation Information**

Use Last Work Order's Start Date to Calculate Next Due Date?  Generate Work Order Based on Meter Readings (Do Not Estimate)?

Generate Work Order When Meter Frequency is Reached?

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**Time Based Frequency** Meter Based Frequency

\* Frequency:  Alert Lead (Days):

\* Frequency Units:  Estimated Next Due Date:

Extended Date:   Adjust Next Due Date?

1. Select the 'Frequency' tab.
2. Frequencies can be based on 'Time Based' (Days, Weeks, Months or Years) or they can be 'Meter Based' (Hours, Miles, Gallons). Complete the Frequency information.
3. Enter the 'Estimated Next Due Date'
4. 'Save' the record.

# PM Tabs – Seasonal Dates Tab

Find:  Select Action

List PM Frequency **Seasonal Dates** Job Plan Sequence PM Hierarchy Forecast

PM: AB1374 \* Fire Alarm Test Site: IA004 Status: DRAFT Forecast Exists?

**2** **1** **4**

Active Days

Sunday?  Monday?  Tuesday?  Wednesday?  Thursday?  Friday?  Saturday?

Schedule Early on Frequency Conflict?

Active Time

Target Start Time: 12:00 AM

**3**

Active Dates Filter > 1 - 1 of 1 Download

Start Month	Start Day	End Month	End Day
MARCH	1	JULY	31

Details

Start Month: MARCH End Month: JULY  
Start Day: 1 End Day: 31

1. Select the 'Seasonal Dates' tab.
2. 'Active Days' determine which days of the week work orders can be generated. On the screen above work orders will only be generated Monday – Friday.
3. 'Active Dates' will determine the period of time work orders will be generated from this PM. Above work orders will be generated between March 1<sup>st</sup> and July 31<sup>st</sup>.
4. 'Save' the record.

# PM Tabs – Job Plan Frequency Tab

Preventive Maintenance

Bulletins: (1) Go To Reports Start Center Profile Sign Out Help IBM

Find: Select Action

List PM Frequency Seasonal Dates **Job Plan Sequence** PM Hierarchy Forecast

PM: AB1374 \* Fire Alarm Test Site: IA004 Status: DRAFT

Forecast Exists?

Maximo ID: AB104250 >> Fire Station

Structure #: 4

Asset: >>

Job Plan: AB1102 >> Monthly Fire Alarm Test

Storeroom: >>

Storeroom Site: IA004

Job Plan Sequence Filter 1 - 2 of 2

Job Plan	Description
AB1102 >>	Monthly Fire Alarm Test
AB1103 >>	Semi-Annual Fire Alarm Test

Download

Sequence

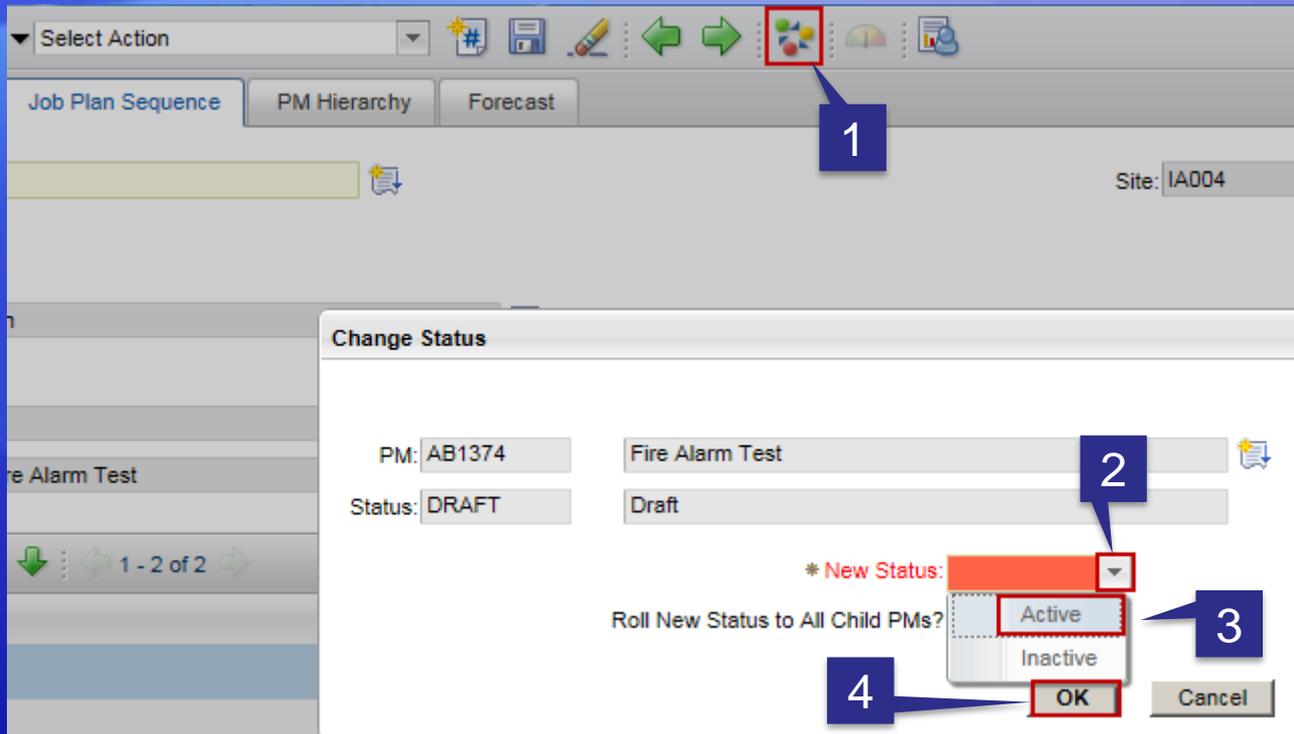
1

6

New Row

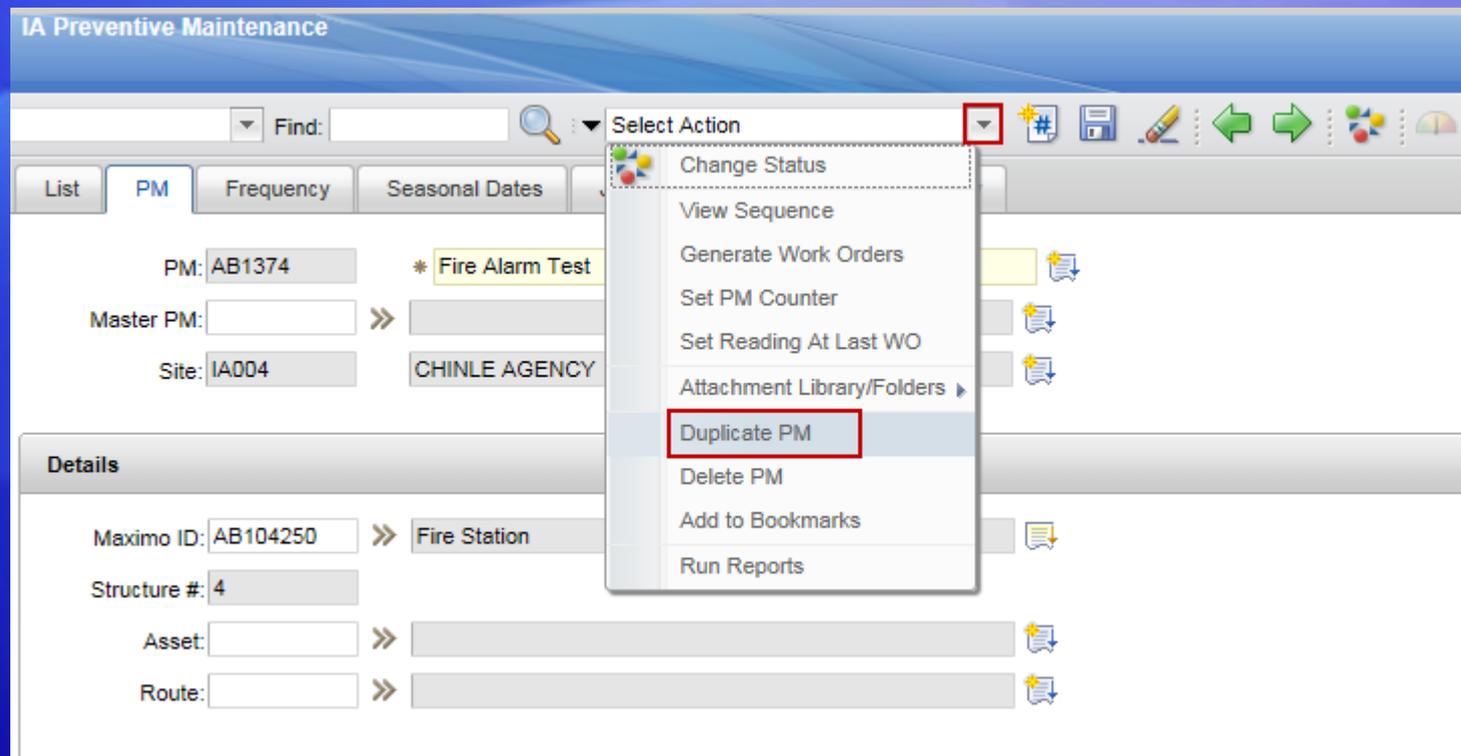
1. Select the 'Job Plan Sequence' tab.
2. Select 'New Row'.
3. Enter the first 'Job Plan'. This will have a 'Sequence' of 1 because the PM 'Frequency' is Monthly.
4. Enter the second 'Job Plan'. This will have a 'Sequence' of 6 because the PM is due every 6 months.
5. 'Save' the record.

# Changing the PM Status



1. Click on the multi-colored icon.
2. Select the down arrow for 'New Status'.
3. Select 'Active'.
4. Select 'OK'.

# Duplicating a PM



Select the PM that needs to be duplicated.

1. Click on the 'down arrow' next the 'Select Action' field.
2. Select 'Duplicate PM'.

# Duplicating a PM

IA Preventive Maintenance

Find:  Select Action

List PM Frequency Seasonal Dates Job Plan Sequence PM Hierarchy

PM: AB1377 \* Fire Alarm Test

Master PM: >>

Site: IA004 CHINLE AGENCY

Details

Maximo ID: AB104250 >> Fire Station

Structure #: 4

Asset: >>

Route: >>

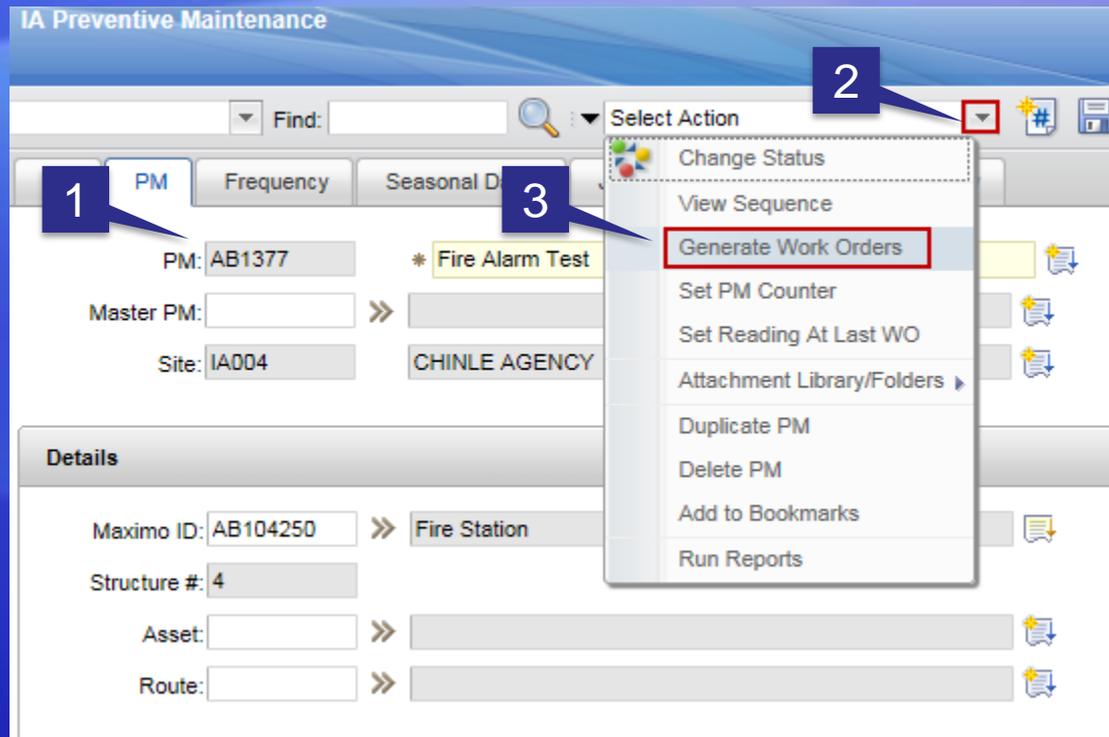
1. Update the 'Description' (if necessary).
2. Update the 'Maximo ID' (if necessary).
3. Update the 'Asset' (if necessary).
4. 'Save' the record.

# Duplicating a PM

The screenshot displays the IA Preventive Maintenance software interface. The main window shows a search bar with 'Find:' and a 'Select Action' dropdown. Below this are tabs for 'List', 'PM', 'Frequency', 'Seasonal Dates', 'Job Plan Sequence', and 'PM Hierarchy'. The 'PM' tab is active, showing a search for 'PM: AB1377' and 'Fire Alarm Test'. A multi-colored icon in the toolbar is highlighted with a red box and labeled '2'. The 'Work Order Generation Information' section is visible, with 'Time Based Frequency' selected. The 'Frequency' field is set to '1' and 'Frequency Units' to 'MONTHS'. The 'Alert Lead (Days)' field is set to '0'. The 'Estimated Next Due Date' field is highlighted with a red box and labeled '1'. A 'Change Status' dialog box is open, showing the 'PM: AB1377' and 'Status: DRAFT'. The 'New Status' dropdown is open, with 'Active' selected, labeled '4'. The 'OK' button is labeled '5'. The 'Roll New Status to All Child PMs?' checkbox is checked. The 'Cancel' button is also visible.

1. Enter a new 'Estimated Next Due Date'.
2. Select the multi-colored icon to change the status from 'Draft'.
3. Click on the 'down arrow' next to the 'New Status' field.
4. Select 'Active'.
5. Select 'OK'.

# Generating Work Orders from a PM



1. Select the PM that you want to generate a work order.
2. Click on the 'down arrow' next to the 'Select Action' field.
3. Select 'Generate Work Orders'.

# Generating Work Orders from a PM

Generate Work Orders

\* Generate WOs Due Today Plus This Number of Days:

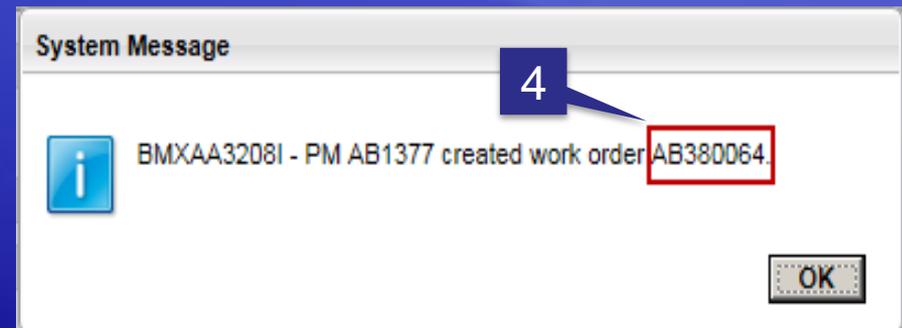
Use Frequency Criteria?

Run Work Order Generation in the Background?

Notification E-mail for Work Order Generation:

OK Cancel

1. The value in this field allows users to generate work orders in advance of the PM's 'Next Due Date'. For example: If you put a value of '10' in this field IA-FMS would look 10 days into the future and generate work orders from PMs that are due in the next 10 days.
2. If this box becomes 'unchecked' IA-FMS will ignore the PM 'Next Due Date' and generate work orders.
3. Select 'OK'
4. This is the work order number that was generated by the PM.



Demo

Preventive Maintenance