Indian Affairs, Division of Facilities Management and Construction

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

Preventive Maintenance (PM’s)
IA-FMS Overview

IA-FMS – Preventive Maintenance
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.
All the fields boxed in RED are searchable. Or to retrieve all records place your curser in the ‘PM’ (first box) and hit Enter on your keyboard.
1. Click on the ‘New PM’ icon.
2. IA-FMS will automatically generate 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.
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.
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 1st and July 31st.
4. ‘Save’ the record.
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 multicolored 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

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

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’.
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

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