

AssetOptics Quick Start Preventive Maintenance – PM Group Schedule Training Exercises

Prior to completing these training exercises, please ensure that you have a user account in an AssetOptics training environment or sandbox. If you do not have a user account, please submit a case via the Support Community at www.assetoptics.com

For these exercises you will be acting as a maintenance supervisor in a fictional brewery. Partial data have been preloaded into a demo org for this purpose. You will be instructed to both review existing records and create new ones to familiarize yourself with the concepts being presented. Save your work as you go.

In this exercise you will learn about the following: PM Group Schedules, PM Group Details, and the concept of Starting Month when scheduling PMs.

Definitions: “Preventive Maintenance (PM) Group Schedule” – a PM Group Schedule is a special type of PM schedule wherein the user defines a hierarchy of fixed-interval PM schedules. The larger interval PMs override the smaller interval PMs, effectively suppressing the creation of work orders that would have otherwise fallen on the same date. The “PM Group Detail” is a child record of the PM Group Schedule and is where you select the Model Work Orders and Monthly Intervals that define the Group Schedule. The following examples will help you understand the concept.

- In a previous exercise you created a fixed-interval monthly **PM Schedule** on the brewery’s mash mixer pump called “Monthly MM Pump Service.” This PM Schedule creates and releases the same preventive work order every month. I.e., at the end of one year there would be 12 identical work orders created from the Model Work Order, all with the same Work Tasks and Planned Stock.
- In a different use case you might instead perform different monthly, quarterly, and annual services on a piece of equipment. Because the quarterly service already includes (or otherwise obviates the need for) the monthly service, you do not want the application to create both monthly and quarterly work orders every three months. Likewise, when it is time for the annual service, you do not want the application to create all three work orders. A **PM Group Schedule** allows you to schedule fixed interval preventive maintenance with built-in suppression logic.

Action: Look at the following example of a PM Group Schedule on an Air Handler. Note the **Monthly Interval** (24, 12, 6, 3, 1) for each PM Group Detail. To reiterate, in the 24th month of the schedule only one preventive work order (“Bi-Annual Service on Air Handler Unit”) is due and not all five.

Details **Related**

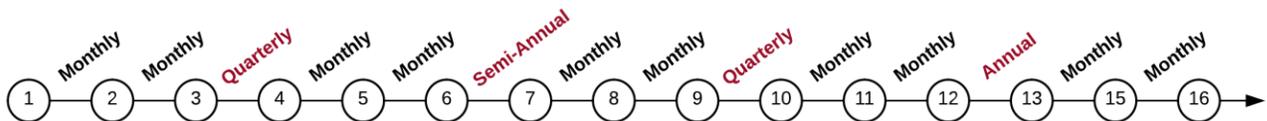
PM Group Details (5) ☆ 🔄 New

5 items · Sorted by Monthly Interval · Updated a few seconds ago

	PM Group Det...	Monthly Int...	Model Work O...	Model WO Description	Next Due Date	Release Wind...	Next Release ...	Cu
1	PMGD-002460	24	WO-0013727	Bi-Annual PM Service on Air Handler Unit	12/31/2021	3	9/30/2021	
2	PMGD-002459	12	WO-0013726	Annual PM Service on Air Handler Unit	12/31/2020	2	10/31/2020	
3	PMGD-002458	6	WO-0013725	Semi-Annual PM Service on Air Handler Unit	6/30/2021	1	5/31/2021	
4	PMGD-002457	3	WO-0013722	Quarterly PM Service on Air Handler Unit	9/30/2020	1	8/31/2020	
5	PMGD-002456	1	WO-0013724	Monthly PM Service on Air Handler Unit	10/31/2020	1	9/30/2020	

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For illustration purposes, this graphical timeline may help you better understand the schedule of work orders to be completed.



Exercise: In this exercise you will create a PM Group Schedule on a new piece of Equipment. After creating the Equipment/Asset record, you will then need to create Model Work Orders corresponding to the PM Group Details you plan to define in the PM Group Schedule. For the sake of simplicity, you will not be editing or creating any new Work Tasks on the Model Work Orders nor adding any Planned Stock.

1. Create a new Equipment/Assets record (Record Type: Equipment) with the following details.

Asset ID: Centrifugal Pump

Description: 5 HP Centrifugal Sanitary Pump

Asset Location: Processing

2. Create Three (3) new **Model Work Orders** as follows.

Description: Monthly Inspection on Centrifugal Pump

Description: Quarterly Inspection on Centrifugal Pump

Description: Annual Overhaul of Centrifugal Pump

3. Create a new **PM Group Schedule** with the following details.

Asset ID: Centrifugal Pump

Starting Month: 1

Day/Weekday of the Month: Weekday of the Month

On: the 1st

Weekday: Monday

4. Add a **PM Group Detail** to the PM Group Schedule with the following details.

Model Work Order: Monthly Inspection on Centrifugal Pump

Monthly Interval: 1

Release Window: 1

5. Add a **PM Group Detail** to the PM Group Schedule with the following details.

Model Work Order: Quarterly Inspection on Centrifugal Pump

Monthly Interval: 3

Release Window: 1

6. Add a **PM Group Detail** to the PM Group Schedule with the following details.

Model Work Order: Annual Overhaul of Centrifugal Pump

Monthly Interval: 12

Release Window: 2

7. Change the **Status** on the PM Group Schedule to Active and save.

8. Click the **Recalculate Due Dates** action button in the header.

9. Review the **PM Group Details** you just created. Recall that all work orders will be due on the first Monday of each month.

It is important to understand that the Starting Month on a PM Group Schedule is the point in the preventive maintenance cycle at which the Status is set to Active. Since this was a brand-new asset and we were at the beginning of the PM cycle, we set the starting month to 1.

In the following example (screenshot), a PM Group Schedule was created and set to Active in December 2020. The preventive work orders are due on the last day of the month. The first monthly PM was performed in April 2020; therefore, we are in Starting Month 9. The third Quarterly PM is due at this end of the current month, and the Annual is due three months from the end of the current month.

PM Group Schedules > PMGS-000001
PM Group Details

3 items - Sorted by Monthly Interval - Updated 7 minutes ago

	PM Group Detail ...	Monthly Interval	Model Work Order	Model WO Description	Next Due Date	Release ...	Next Release ...
1	PMGD-000005	12	WO-000018	Annual Overhaul of Centrifuga...	3/29/2021	2	1/25/2021
2	PMGD-000004	3	WO-000017	Quarterly Inspection on Centri...	12/28/2020	1	11/30/2020
3	PMGD-000003	1	WO-000016	Monthly Inspection on Centrif...	1/25/2021	1	12/28/2020

You can find more information about PM Group Scheduling in the Knowledge Base at www.assetoptics.com