

Successful Schooldude PM Implementation

Tuesday, February 8th, 2011

2-3 PM EST

Hosted by Jed DeGroote and Mike Stapleton

Our certified partner, Service Management Assist (SMA), has worked with numerous educational organizations to assist in implementing PMDirect. SMA provides design and data entry services for PMDirect so that you can continue to focus on your day to day issues.

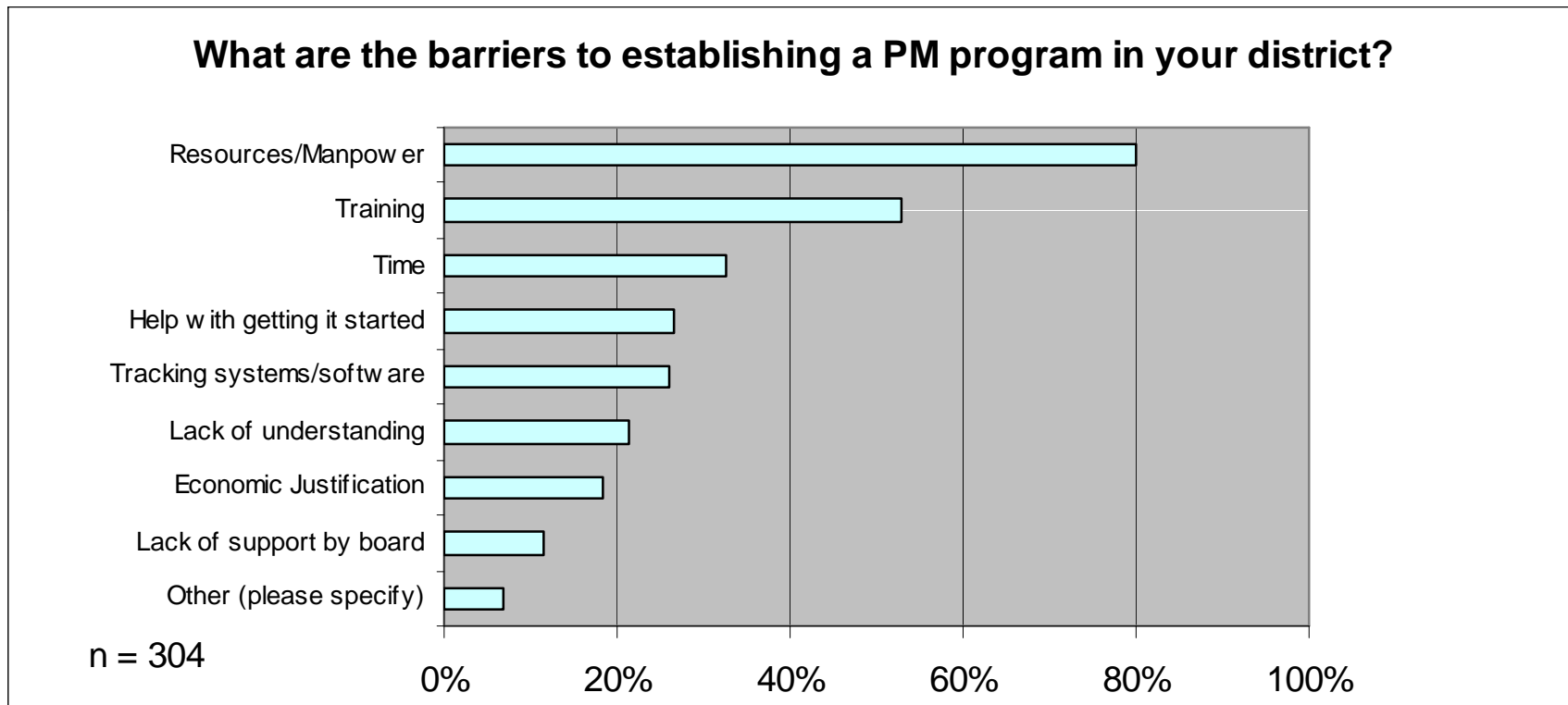
For the audio portion, dial 866-740-1260 and use the following access code- 8168244

We will begin the webinar in just a few minutes. To ask questions throughout the webinar use the chat feature. We will review and answer questions submitted through the chat feature at the half way point and at the end of the webinar.

Thank you for attending!



PM Challenges



PM Benefits

- General life safety
- Extending the life of the buildings and grounds
- Providing an appropriate learning environment for students
- Increasing the productivity of faculty, administrators, students and operations and maintenance personnel
- Improving and maintaining the aesthetic qualities of the building and grounds
- Identifying degradation of building elements that may otherwise be unnoticed
- Ensuring compliance with current codes and standards
- Reducing energy consumption to the lowest possible level



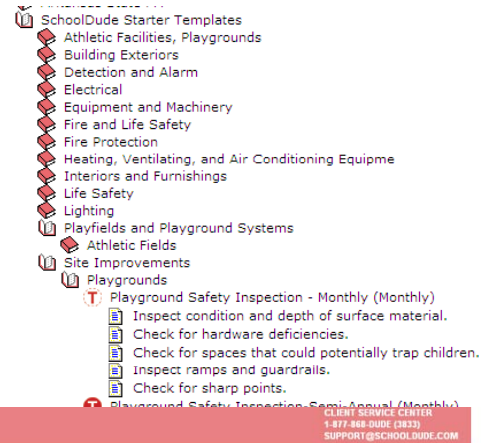
How SchoolDude can help

SchoolDude.com Starter Templates

Customized Quick Step Guides

Unlimited one on one consultation sessions
(training@schooldude.com)

Certified Partner services-SMA

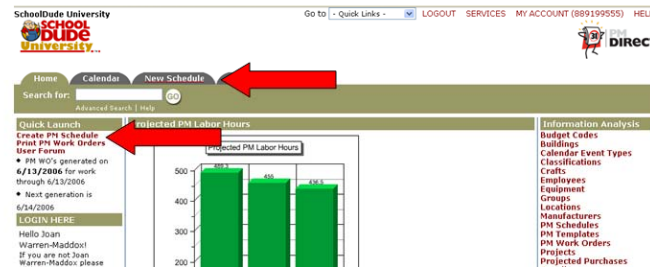


Schedules and Templates in PM Direct

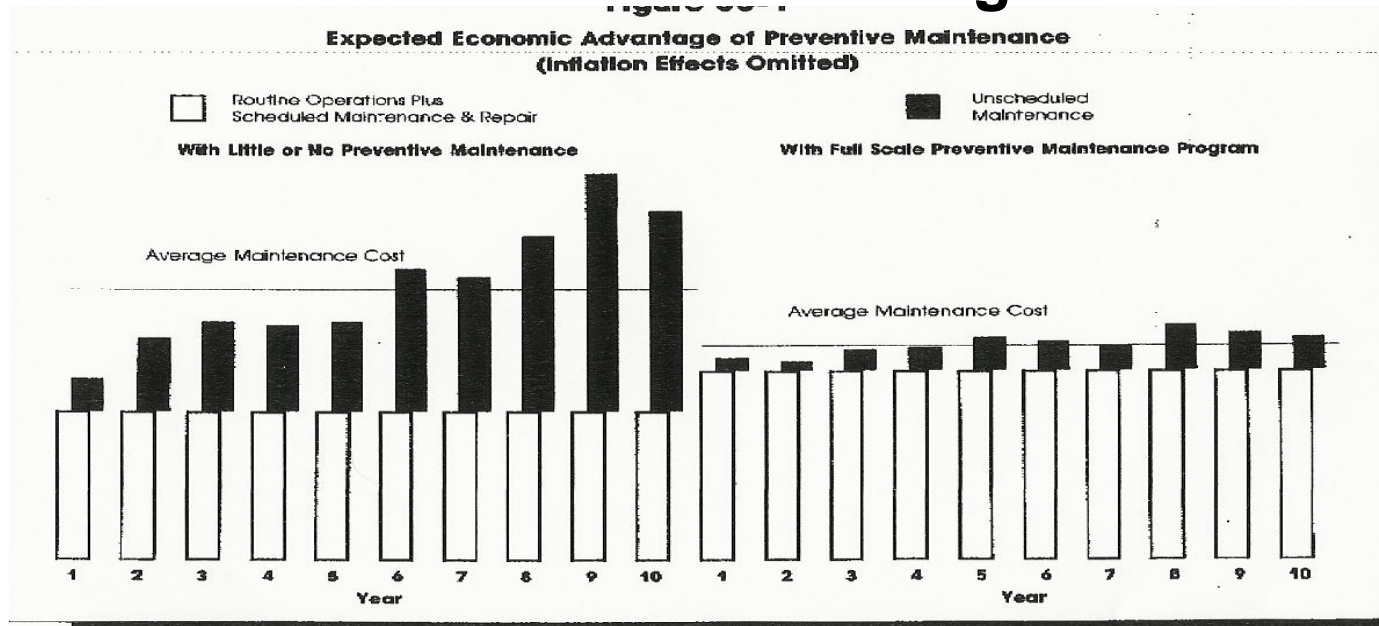
This is a **Quick Step** reference guide to creating a PM Schedule. For more detailed instructions, please refer to the PMDirect manual on the Help page, or give us a call here at the office. Depending on the complexity of your schedules, we can usually help you set up a couple of schedules for your account in a 15-20 minute phone call.

Equipment is not a required field in a PM schedule and can be added anytime.*

To create a schedule, click the [Create PM Schedule](#) or the [New Schedule](#) link from your home page.



The Economic Advantage



- District 54 saved \$861,714 (at today's rates) over five years because of the PM program & good facility management.
- The equivalent savings for a 1M square foot district would be \$568,731.



Service Management Assist
INC

Planned Maintenance is Rare in Educational Institutions

FACT: Most education institutions do not have an effective planned maintenance program.

FACT: Many education institutions purchase planned maintenance software yet do not implement planned maintenance; even after years of trying.

FACT: Even the best facility managers have tremendous pressures on their time to handle day to day issues; implementing a planned maintenance program happens very rarely because it may take hundreds of hours to set up.

FACT: Most education institutions are spending more than necessary for utilities and emergency repair labor; the lack of effective planned maintenance results in significant dollars being left “on the table”.



The Increased Scope of Education Facility Management

Education Facility Managers are so over programmed that a complete program is rarely delivered

70's,80's,90's,00's & Now

40's,50's & 60's

1. Custodial operations
2. Maintenance operations
3. Grounds operations
4. Electrical / gas utility
5. Pest control (in-house)
6. Playground equipment
7. Roofs
8. Safety – general
9. School closings
10. Vandalism

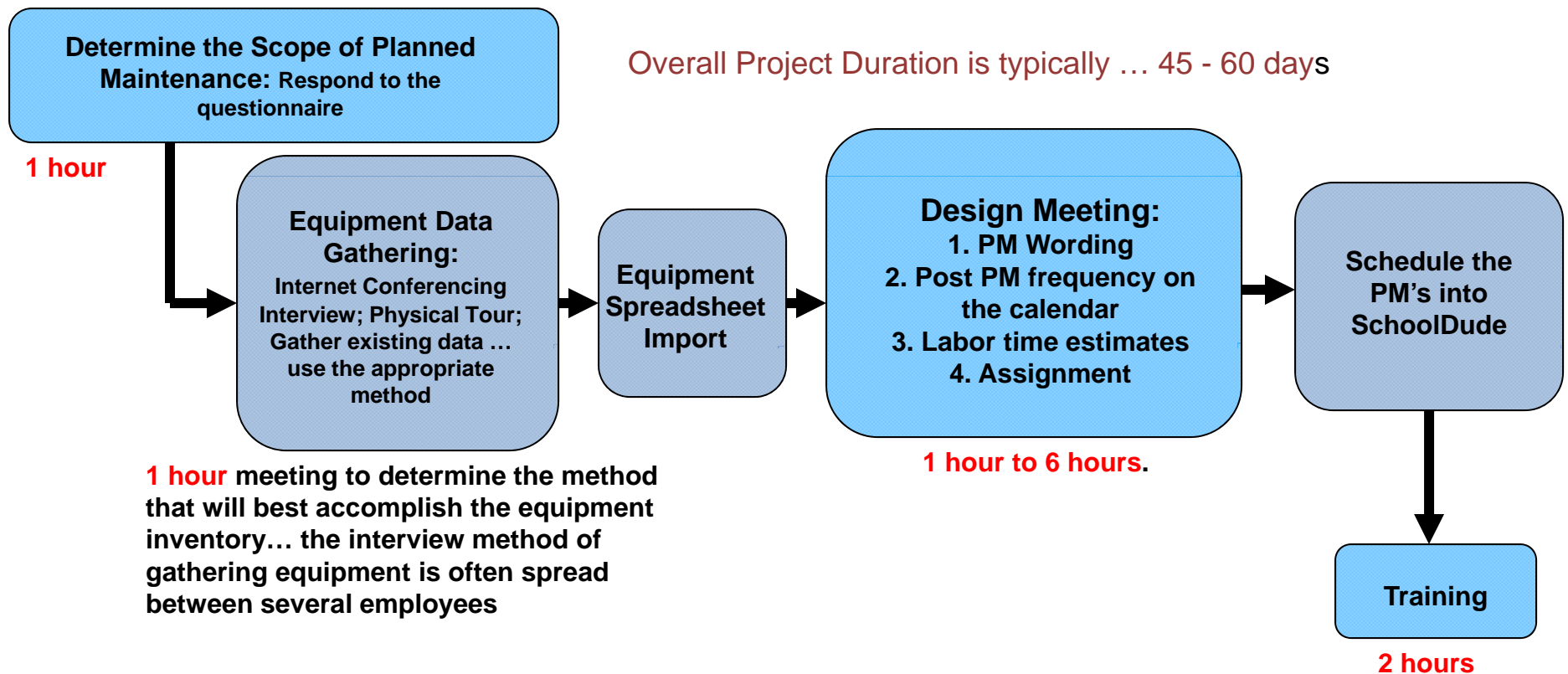
**Facility programs
have increased
dramatically but
many institutions
have smaller
leadership teams**

1. Custodial operations
2. Maintenance operations
3. Grounds operations
4. Electrical / gas utility
5. Playground equipment
6. Pest control (in-house)
7. Roofs
8. Safety – general
9. School closings
10. Vandalism
11. Mold management
12. Asbestos (AHERA)
13. Carbon Dioxide testing
14. Lead in water
15. Natural gas volume purchasing
16. Electrical volume purchasing
17. CAD
18. CMMS with preventive maintenance
19. Electromagnetic emissions
20. Emergency / disaster plans
21. Energy management systems
22. Energy education
23. Data based custodial schedules
24. Rentals, community usage
25. ADA
26. Owners Construction Rep.
27. Indoor Air Quality
28. Lead in paint
29. Integrated Pest Management
30. Privatized custodial
31. Purchased services management
32. Protective equipment & clothing
33. Radon Management
34. Recycle waste program
35. Re-locatable classrooms
36. Right to Know Act
37. Underground storage tanks
38. Computerization – technology support
39. Blood borne pathogens
40. Budget planning
41. Labor law issues
42. OSHA Logging & training
43. Custodial equipment management
44. Quality Assurance program
45. Hazardous Waste Removal
46. Emergency Backpacks
47. Building Backpack Supply
48. Defibrillator maintenance
49. Defibrillator training
50. Security systems
51. Green chemical management
52. Carbon footprint issues
53. Sustainability program
54. Life/Safety Planning
55. Playground management
56. Expanded athletic programs
57. Swimming pool maintenance
58. Indoor track & field
59. Fertilization & weed control
60. Artificial athletic fields



PMDirect Implementation Flow:

SMA provides planned maintenance customized to your institution with very little time invested by facility management.



An internet conference to determine your quote ... this should take 45 minutes to an hour.

The planned maintenance program may go beyond mechanical equipment to include:

- ❖ Safety Program
- ❖ Grounds Program
- ❖ Custodial Projects
- ❖ Maintenance Painting
- ❖ Vehicle Maintenance
- ❖ Operations Inspections

Questionnaire Response

Post
Name: Your Institution

Price

Stages

Elem (Small)	4	0
MS/JH (Medium)	1	0
HS (Large)	1	0
Total:	6	
Maintenance Employees:	5	0
Vehicles:	6	0
		% / Full
HVAC	31	80%
Plumbing	3	100%
Food	5	50%
Elect / Inst.	0	80%
		Sub Total
Safety Program		
Inspection	24	100%
Training	8	100%
		Sub Total
Operations		
DTR	0	100%
Opes Insp.	12	100%
		Sub Total
Grounds Program		
Program	0	
Site	10	100%
		Sub Total
Painting Schedule	0	100%
Custodial Schedules	0	100%
Training	0	100%
Vehicle Maintenance	7	100%
Other Categories	0	100%

Home Prop
Price Post
Stages Reset

Name: Your Institution Savings Estimates:

4	Small (Elem) (Under 50K)	OT	\$732
1	Medium (MS/JH) (50K to 150K)	PS	\$10,576
1	Large (HS) (150K Up)	Utility	\$24,396
5	Maint. Employees	2nd Year:	\$35,704
6	Vehicles		
7%	Student Count		4,000
6%	MaintenanceDirect Implementation ...	see L50	
	<input checked="" type="checkbox"/> HVAC		
\$15.20	<input checked="" type="checkbox"/> Plumbing		
\$11.82	<input checked="" type="checkbox"/> Food		
\$9.31	<input checked="" type="checkbox"/> Elect / Inst.		
	<input checked="" type="checkbox"/> Safety Inspection		
	<input checked="" type="checkbox"/> Safety Training		
	<input checked="" type="checkbox"/> Operation DTR		
24.8	<input checked="" type="checkbox"/> Operations Inspections		
3	<input checked="" type="checkbox"/> Grounds Program		
2.5	<input checked="" type="checkbox"/> Grounds Site PM's		
0	<input checked="" type="checkbox"/> Painting Schedule		
	<input checked="" type="checkbox"/> Custodial Schedules / Training		
	<input checked="" type="checkbox"/> Vehicle Maintenance		
24	<input checked="" type="checkbox"/> Other Categories		
8			

Home

1	Absorber	31
0	1 2 Air Compressor	
12	1 3 Air Dryer	
	1 4 Air Handling Unit	
	1 5 Air Intake Damper	
0	6 Boiler	
10	1 7 Ceiling Unit Heater	
	1 8 Ceiling Unit Ventilator	
	1 9 Chiller	
0	1 10 Condensate Pump	
	1 11 Condensing Unit	
0	1 12 Cooling Tower	
0	13 Dehumidifier	
7	1 14 Dust System	
	1 15 Electric Heater	
0	16 Evaporate Cooler	
	17 Evaporative Condenser	

Price
Stages



The PM Scope ... a quote by category.

**Your Institution
Planned Maintenance Installation in SchoolDude**

Optional Phased Implementation by Category

		# of Schedules
HVAC, Plumbing, Food Equipment & Electrical Components	\$3,095	182
Safety Program	\$245	56
Operations	\$315	72
Grounds Program	\$263	60
Custodial Projects	\$0	0
Painting Schedule	\$0	0
Vehicle Maintenance	\$228	12
Other Categories	\$0	0
MaintenanceDirect Implementation	\$0	
Totals:		\$4,145
Total if accepted as a complete project:		\$3,856
Total schedules:		382

If you desire a phased implementation please contact us to revise the quote based on the particular categories you wish to have us implement.



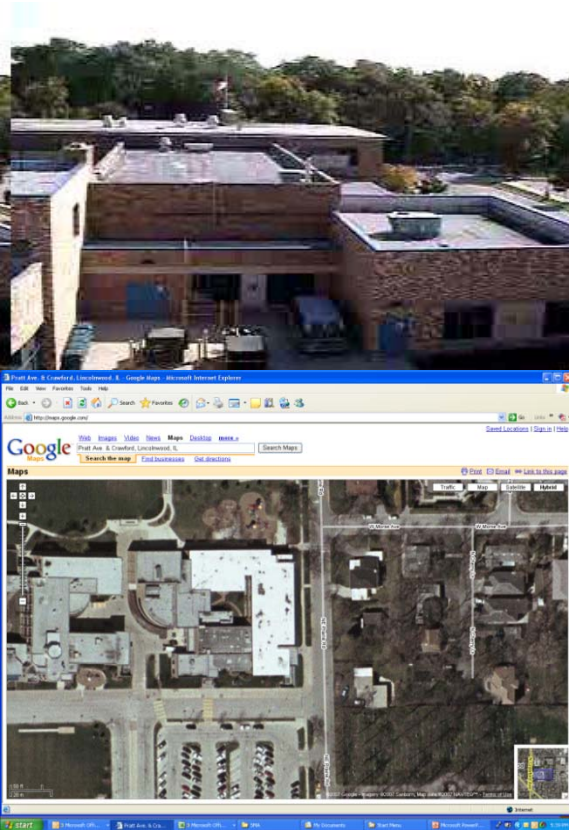
The Equipment Inventory Challenge

The essential equipment information entries needed to start a planned maintenance program are as follows:

1. Item #;
2. Equipment description;
3. Area location of the equipment;
4. Location (building) and
5. Filter / belt information related to the piece of equipment (existing lists of equipment, belts and filters are obtained to add to the list).

The first four listings allow the beginning of the planned maintenance scheduling. Many details like manufacturer, model and serial numbers are added by employees during the first cycle of planned maintenance work orders; these details are written on the work order and batched for entry by a clerical person.

The detailed equipment list may be obtained by **physical tours** of your buildings ... most institutions suffer from sticker shock (70% more) when presented with a quote for these data gathering tours.



The most common sources of obtaining information for the equipment inventory:

- ✓ Existing or old CMMS programs; existing hard copy equipment inventories; BAS equipment lists; blueprint tables and “as built” documents.
- ✓ Internet conferencing interviews of key facility employees to form lists of equipment.
- ✓ Have SMA train your employees to conduct physical inventories of equipment.

Photocopy then fax the table section of the Mechanical (M) Section of reasonably accurate blueprints and we will form a beginning list of equipment to edit with your people.

The image shows a collection of mechanical equipment schedule tables from a blueprint. The tables are arranged in a grid-like fashion. The tables include:

- CLASSROOM UNIT VENTILATORS**: A table with columns for unit number, location, and other details.
- EXHAUSTING AIR HANDLING UNIT**: A table with columns for unit number, location, and other details.
- PIN TUBE RADIATION BLOWER FANS**: A table with columns for unit number, location, and other details.
- WATER PUMPS**: A table with columns for pump number, location, and other details.
- CONDENSATE PUMPS**: A table with columns for pump number, location, and other details.
- UNIT HEATERS (ELECTRIC)**: A table with columns for unit number, location, and other details.
- AIR COOLED CONDENSING UNITS**: A table with columns for unit number, location, and other details.
- CONV LOUVER SIZES**: A table with columns for louver number, location, and other details.
- EXHAUST UNITS**: A table with columns for unit number, location, and other details.
- EXPANSION TANKS**: A table with columns for tank number, location, and other details.
- CONVECTORS (HOT WATER)**: A table with columns for convector number, location, and other details.

On the right side of the blueprint, there is a vertical text string: "SERVICE MANAGEMENT ASSISTANT & HOT INC."



Service Management Assist
inc

Screen shots of the BAS system can often give the beginning information for an equipment list ... PrtScn; Paste then email.

The screenshot shows a software interface for a Building Automation System (BAS) titled "Tracer Summit - [Graphic - MS Plant and AHUs, Medfield]". The main window displays "Main Plant and Air Handlers Equipment" with a sidebar on the left listing various HVAC units (HV-01 to HV-14). The main area is divided into columns for different equipment types: Gas Fired Makeup Air Units, Precident/Voyagers RTUs, and Classroom Units. A table lists specific equipment units with their IDs.

Gas Fired Makeup Air Units	Precident/Voyagers RTUs	Class-room Units	Classroom Units	Classroom Units
MUA-1: Corridors	RTU-01: Music Rm	UV MS-RM106_B106	UV MS-RM125_C157	UV MS-RM204_B189
CAB-1: Boiler Combustion		UV MS-RM106_B107	UV MS-RM125_C108	
		UV MS-RM109_B109	MS-RM 127_B127	
		UV MS-RM110_B110	UV MS-RM127_C154	
		UV MS-RM111_B108	UV MS-RM128_B128	
		UV MS-RM112_B111	UV MS-RM128_C156	
		UV MS-RM113_B110A	UV MS-RM129_B129	
		MS-RM 114_B113	UV MS-RM129_C154	
		UV MS-RM116_B117	UV MS-RM130_B130	
		UV MS-RM117_B113	UV MS-RM130_C163	
		UV MS-RM118_C100	UV MS-RM131_B131	
		UV MS-RM119_C101	UV MS-RM132_B132	
		UV MS-RM120_C102	UV MS-RM134_B134	
		UV MS-RM121_C104	UV MS-RM135_B135	
		MS-RM 122_C105	UV MS-RM137_B137	
		MS-RM 124_C110	UV MS-RM203_B110	

At the bottom of the window, a status bar shows the date and time as 2/22/2010 2:24 PM, the user as BERNIE, and the location as Medfield. A red "ALARM" indicator is visible in the bottom right corner.



Step 1: We input the notes into the equipment spreadsheet and send it back to you for more detail.

Step 2: You return the spreadsheet to us by fax or email. We prepare the list for import into SchoolDude.

Step 3: SchoolDude imports the list and the equipment data is ready for PM scheduling.

Item Number	Description	Area Number	Manufacturer	Model Number	Serial Number	Notes	Location
2	DF 1 8ED	Drinking Fountain	South Hallway	Halvey-Taylor	S-1000-100		08 - EDUCATION
3	DF 2 8ED	Drinking Fountain	West Hallway	Halvey-Taylor	S-1000-100		08 - EDUCATION
4	PGH1 8ED	Propane Heaters	Exterior Mech Rm	Lennox	GSR-21-80	18x25x1	08 - EDUCATION
5	PGH2 8ED	Propane Heaters	Exterior Mech Rm	Lennox	GSR-21-80	18x25x1	08 - EDUCATION
6	PGH3 8ED	Propane Heaters	Exterior Mech Rm	Lennox	GSR-21-80	18x25x1	08 - EDUCATION
7	PGH4 8ED	Propane Heaters	Exterior Mech Rm	Lennox	GSR-21-80	18x25x1	08 - EDUCATION
8	PGH5 8ED	Propane Heaters	Exterior Mech Rm	Lennox	GSR-21-80	18x25x1	08 - EDUCATION
9	PGH6 8ED	Propane Heaters	Exterior Mech Rm	Lennox	GSR-21-80	18x25x1	08 - EDUCATION
10	CR BELL 8ED	Bell System	Exterior Mech Rm	Trox			08 - EDUCATION
11	EF WRR 8ED	Exhaust Fan	Womens Rest Room	Broan			08 - EDUCATION
12	EF MRR 8ED	Exhaust Fan	Mens Rest Room	Broan			08 - EDUCATION
13	FCU1 8ED	Fan Units	Room 1	Fujitsu	ABU-24-RULX		08 - EDUCATION
14	FCU2 8ED	Fan Units	Room 2	Fujitsu	ASU-24-RLXQ		08 - EDUCATION
15	FCU3 8ED	Fan Units	Room 3	Fujitsu	ASU-24-RLXQ		08 - EDUCATION
16	FCU4 8ED	Fan Units	Room 4	Fujitsu	ASU-24-RLXQ		08 - EDUCATION
17	FCU5 8ED	Fan Units	Room 5	Fujitsu	ASU-24-RLXQ		08 - EDUCATION
18	FCU6 8ED	Fan Units	Room 6	Fujitsu	ABU-24-RULX		08 - EDUCATION
19	CU1 8ED	Condensing Unit	Outside Rm 1	Fujitsu	AOU-24-RLX	R410A 208/230 1phase	08 - EDUCATION
20	CU2 8ED	Condensing Unit	Outside Rm 2	Fujitsu	AOU-24-RLXQ	R410A 208/230 1phase	08 - EDUCATION
21	CU3 8ED	Condensing Unit	Outside Rm 3	Fujitsu	AOU-24-RLXQ	R410A 208/230 1phase	08 - EDUCATION
22	CU4 8ED	Condensing Unit	Outside Rm 4	Fujitsu	AOU-24-RLXQ	R410A 208/230 1phase	08 - EDUCATION
23	CU5 8ED	Condensing Unit	Outside Rm 5	Fujitsu	AOU-24-RLXQ	R410A 208/230 1phase	08 - EDUCATION
24	CU6 8ED	Condensing Unit	Outside Rm 6	Fujitsu	AOU-24-RLX	R410A 208/230 1phase	08 - EDUCATION
25	MAU1 8ED	Make-up Air Unit	Attic South				08 - EDUCATION
26	MAU2 8ED	Make-up Air Unit	Attic West				08 - EDUCATION
27	WH 8ED	Water Heater		Ruud	PE2540-2	Inst: 12/31/08 240/208 1 phase 38 GAL.	08 - EDUCATION
28							
29	WAC1 9AD	Window Air Conditioner	Main Office	Kenmore		208 20A	To Be Replaced 09 - ADMINISTRATION
30	WAC2 9AD	Window Air Conditioner	IT Room	Maytag	M6Q10F2A-E		09 - ADMINISTRATION
31	DF1 9AD	Drinking Fountain	Hallway	Sunroc			09 - ADMINISTRATION
32	EF WRR 9AD	Exhaust Fan	Womens Rest Room	Broan			09 - ADMINISTRATION
33	EF MRR 9AD	Exhaust Fan	Mens Rest Room	Broan			09 - ADMINISTRATION
34	PGH1 9AD	Propane Heaters	Mech Room	Lennox	GSR 21 Q3-80-7	20x25x1	09 - ADMINISTRATION
35	PGH2 9AD	Propane Heaters	Mech Room	Lennox	GSR 21 Q3-80-7	20x25x1	09 - ADMINISTRATION
36	WH 9AD	Water Heater	Crawl Space	A.O. Smith	ELJ 30 911	220-240 v.h	09 - ADMINISTRATION
37							
38	PKG1 10BS	Package, Heating & Cooling	Lennox				10 - BUSINESS SKILLS
39	PKG2 10BS	Package, Heating & Cooling	Lennox				10 - BUSINESS SKILLS
40	DF1 10BS	Drinking Fountain	West Wall	Elkay			10 - BUSINESS SKILLS
41	EF WRR 10BS	Exhaust Fan	Womens Rest Room	Broan			10 - BUSINESS SKILLS



The Design Meeting Calendar

COM	Ter	DESCRIPTION	Date	Time	Assigr	Gro	1-Jan.	2-Feb	3-Mar	4-Apr	5-May	6-Jun	7-Jul	8-Aug	9-Sep	10-Oct	11-Nov	12-Dec
1	39	UNIT VENTILATOR	9/1	0.25	MH	X			X			ANN			X			X
2	39	CEILING UNIT VENT	9/1	0.25	MH	X			X			ANN			X			X
3	1	AIR HANDLING UNIT	10/1	0.60	JD			X				X				X		
4	27	EXHAUST FAN	10/1	0.30	PK					X						X		
5	7	CEILING UNIT HEATER		0.40								X						
6	36	PUMP HVAC		0.30			X				X				X			
7	41	VARIABLE AIR VOLUME		0.30										X				
8	29	FAN POWER UNIT		0.30				X				X				X		
9	42	WALL UNIT HEATER		0.25					X						X			
10	25	ELECTRIC HEATER		0.50					X						X			
11	5	HOT WATER BOILER		6.00														X
12	10	CENTRAL CHILLED WTR		8.00					ANN									
13	16	CONDENSING UNIT		1.00					X				X					
14	35	PACKAGE HTG & COOL		1.50				X			X			X			X	
15	19	COOLING TOWER		4.00														
16	34	NATURAL GAS HEATER		0.75												X		
COM	Ter	DESCRIPTION	Date	Time	Assigr	Gro	1-Jan.	2-Feb	3-Mar	4-Apr	5-May	6-Jun	7-Jul	8-Aug	9-Sep	10-Oct	11-Nov	12-Dec
17	24	DRINKING FOUNTAIN		0.30														
18	37	PUMP PLUMBING		0.30														
19	38	SUMP PUMP		1.00														

The sequence and frequency of PM actions are posted on the calendar. Assignments, grouping and time estimates are also noted.

The Design Meeting is the key to making the planned maintenance program customized to your institution. SMA will work with you by internet conferencing or meeting at your site:

- Determine the wording to be applied to the PM work orders
- Post the sequence of PM actions on the calendar
- Estimate the labor time for each PM action
- Determine if an equipment type may be consolidated into fewer work orders
- Post the names of the technicians to receive the PM work orders



Design Meeting: Planned Maintenance Action Wording

3 Air Dryer

AIR DRYER

De-energize, lock out, and tag electrical circuit

Clean the condenser coil with either compressed air or a pressure sprayer ... insures that the coil is clear and clean.

Lubricate the fan motor if necessary.

Wipe down the dryer unit.

Remove tags, and restore to service.

Clean up work area and remove trash.

Run unit and check for unusual noise or vibration.

Observe the refrigerator as it runs.

Check refrigerant level and moisture content if a sight glass is available. If low level or moisture is indicated, contact the service personnel.

Record the time taken to service and the material used on the PM work order.

4 Air Handling Unit

AIR HANDLING UNIT

De-energize, lock out, and tag electrical circuit.

Replace filters

Check belts for wear or cracks replace if needed and record belt(s) used on the PM work order.

Check for proper belt tension and alignment if applicable.

Check pulley mounting on shaft and wear on grooves

Check for any play in bearings by moving fan shaft

Check fan vanes and actuator for any loose play

Clean drain pan and note excessive corrosion.

Check and clean heating and cooling coils as needed. Use fin comb if needed to straighten fins.

Grease fan bearings and check grease line for any cracks or splits

Check fan motor by manually rotating pulley and listen for any unusual noise.

Clean motor, fan, damper blades and fan chamber

Check condition of fan motor (paint, corrosion)

Check condition of ductwork, fan insulation and canvas.

Remove tags, and restore to service.

Clean up work area and remove trash.

Run fan and check for unusual noise or vibration.

Record the time taken to service and the material used on the PM work order.

SMA will provide a set of PM action task wording, you will be asked to review this wording ... if you desire changes from the initial set we encouraged you to ask for alternate task wording from the many other sets of PM procedures we have on file.



Planned Maintenance Scheduling Steps

Preventive MaintenanceDirect - Microsoft Internet Explorer provided by Comcast High-Speed Internet

Home Calendar New Schedule Account Settings

Search for:

Microsoft Excel - Iowa City PM Schedules 3-27-06

Advanced Search |

PM SCHEDULE
Steps for schedule setup
(*Optional steps)

- Step 1 Select Classification
- Step 2 Select Type
- Step 3 Select Manufacturer*
- Step 4 Select Location*
- Step 5 Select Equipment*
- Step 6 Select PM Template*
- Step 7 Define Job Start Up*
- Step 8 Define Safety Points*
- Step 9 Define Tasks & Procedures*
- Step 10 Define Tools*
- Step 11 Define Parts*
- Step 12 Define Journal Notes*
- Step 13 Define Codes & Assignment*
- Step 14 Define Frequency*

#	Title	1 Classification	2 Type	4 Location	6 A One Vs ALL	8 Equip Select	7 Template	14 Assignment / Time Est.	15 Start Date
64	55 SPRINK City H.S.	Safety	Sprinkler	City High School					
65	61 VAV City H.S.	HVAC (Htg,Vent, & AC)	Variable Air Volume	City High School					
66	66 C TRAPS Coralville	Plumbing	Clay Trap	Coraville Central Elementary				Wayne Grout	3/1/2006
67	72 EF Coralville	HVAC (Htg,Vent, & AC)	Exhaust Fan	Coraville Central Elementary	All		27	Joe Chezum	3/1/2006
68	75 ERU QTR Coralville	HVAC (Htg,Vent, & AC)	Energy Recovery Unit	Coraville Central Elementary	One			Joe Chezum	3/1/2006
69	76 FL AHU Coralville	HVAC (Htg,Vent, & AC)	Air Handling Unit	Coraville Central Elementary	All		52	Joe Chezum	3/1/2006
70	79 HYD BLR MO Coralville	HVAC (Htg,Vent, & AC)	Boiler	Coraville Central Elementary	One		55	Joe Chezum	3/1/2006
71	87 STM BLR MO Coralville	HVAC (Htg,Vent, & AC)	Boiler	Coraville Central Elementary	One		52	Joe Chezum	3/1/2006
72	65 C PUMP Coralville	HVAC (Htg,Vent, & AC)	Condensate Pump	Coraville Central Elementary	One		17	Joe Chezum	4/1/2006
73	66 COND Coralville	HVAC (Htg,Vent, & AC)	Condensing Unit	Coraville Central Elementary	One		16	Joe Chezum	4/1/2006
74	83 PUMP Coralville	HVAC (Htg,Vent, & AC)	Pump	Coraville Central Elementary	All		36	Joe Chezum	4/1/2006
75	70 ERU POST Coralville	HVAC (Htg,Vent, & AC)	Boiler	Coraville Central Elementary	One		49	Joe Chezum	5/1/2006
76	88 STM BLR POST Coralville	HVAC (Htg,Vent, & AC)	Boiler	Coraville Central Elementary	One		57	Joe Chezum	5/1/2006
77	64 AHU Coralville	HVAC (Htg,Vent, & AC)	Air Handling Unit	Coraville Central Elementary	One		1	Joe Chezum	6/1/2006
78	73 ERU ANN Coralville	HVAC (Htg,Vent, & AC)	Energy Recovery Unit	Coraville Central Elementary	One		50	Joe Chezum	6/1/2006
79	82 MAIN SW Coralville	Electrical	Main Switch	Coraville Central Elementary	One			Jeff Barnes	6/1/2006
80	91 UV Coralville	HVAC (Htg,Vent, & AC)	Unit Ventilator	Coraville Central Elementary	All		39	Joe Chezum	6/1/2006
81	87 CON CC Coralville	HVAC (Htg,Vent, & AC)	Condensing Unit	Coraville Central Elementary	One		59	Joe Chezum	7/1/2006
82	77 G TRAP Coralville	Plumbing	Grease Trap	Coraville Central Elementary	One			Wayne Grout	7/1/2006
83	81 HYD BLR PRE Coralville	HVAC (Htg,Vent, & AC)	Boiler	Coraville Central Elementary	One		56	Joe Chezum	9/1/2006
84	89 STM BLR PRE Coralville	HVAC (Htg,Vent, & AC)	Boiler	Coraville Central Elementary	One		53	Joe Chezum	9/1/2006
85	90 U&T BAT Coralville	Plumbing	Battery	Coraville Central Elementary				Wayne Grout	9/1/2006
86	92 WH Coralville	Plumbing	Water Heater	Coraville Central Elementary	One		43	Wayne Grout	9/1/2006
87	71 DF Coralville	Plumbing	Drinking Fountain	Coraville Central Elementary	One		24	Wayne Grout	2/1/2007
88	69 DDC Coralville	HVAC (Htg,Vent, & AC)	Controls	Coraville Central Elementary					
89	70 DELUM Coralville	HVAC (Htg,Vent, & AC)	Dehumidifier	Coraville Central Elementary					
90	74 ERU MO Coralville	HVAC (Htg,Vent, & AC)	Energy Recovery Unit	Coraville Central Elementary	One				
91	78 HT CONV Coralville	HVAC (Htg,Vent, & AC)	Heat Convector	Coraville Central Elementary			48	Joe Chezum	
92	84 SMOKE Coralville	Safety	Smoke Alarm	Coraville Central Elementary					
93	03 SPRINK AHU Coralville	Safety	Smoke Alarm	Coraville Central Elementary					
94	86 SPRINK Coralville	Safety	Sprinkler	Coraville Central Elementary					
95	94 C TRAPS Hills Elem	Plumbing	Clay Trap	Hills Elementary	One			Wayne Grout	3/1/2006
96	95 CHLN Hills Elem	Plumbing	Water Treatment	Hills Elementary	One			Wayne Grout	3/1/2006
97	101 EF Hills Elem	HVAC (Htg,Vent, & AC)	Exhaust Fan	Hills Elementary	All		27	Joe Chezum	3/1/2006
98	102 FL AHU Hills Elem	HVAC (Htg,Vent, & AC)	Air Handling Unit	Hills Elementary	All		52	Joe Chezum	3/1/2006
99	105 HYD BLR MO Hills Elem	HVAC (Htg,Vent, & AC)	Boiler	Hills Elementary	One		55	Joe Chezum	3/1/2006
100	139 WTR SYT Hills Elem	Plumbing	Water Treatment	Hills Elementary	One			Wayne Grout	3/1/2006
101	97 CLR PRE Hills Elem	HVAC (Htg,Vent, & AC)	Chiller	Hills Elementary	One		10	Joe Chezum	4/1/2006
102	99 COND Hills Elem	HVAC (Htg,Vent, & AC)	Condensing Unit	Hills Elementary	One		16	Joe Chezum	4/1/2006
103	110 PUMP Hills Elem	HVAC (Htg,Vent, & AC)	Pump	Hills Elementary	All		36	Joe Chezum	4/1/2006
104	116 IWAC Hills Elem	HVAC (Htg,Vent, & AC)	Window Air Conditioner	Hills Elementary	One		44	Joe Chezum	4/1/2006
105	106 HYD BLR POST Hills Elem	HVAC (Htg,Vent, & AC)	Boiler	Hills Elementary	One		57	Joe Chezum	5/1/2006
106	93 AHU Hills Elem	HVAC (Htg,Vent, & AC)	Air Handling Unit	Hills Elementary	One		1	Joe Chezum	6/1/2006
107	108 MAIN SW Hills Elem	Electrical	Main Switch	Hills Elementary	One			Jeff Barnes	6/1/2006
108	115 UV Hills Elem	HVAC (Htg,Vent, & AC)	Unit Ventilator	Hills Elementary	All		39	Joe Chezum	6/1/2006
109	98 CON CC Hills Elem	HVAC (Htg,Vent, & AC)	Condensing Unit	Hills Elementary	One		59	Joe Chezum	7/1/2006
110	103 G TRAP Hills Elem	Plumbing	Grease Trap	Hills Elementary	One			Wayne Grout	8/1/2006
111	96 CLR POST Hills Elem	HVAC (Htg,Vent, & AC)	Chiller	Hills Elementary	One		58	Joe Chezum	9/1/2006
112	104 GTR Hills Elem	HVAC (Htg,Vent, & AC)	Nat. Gas Heater	Hills Elementary	One		34	Joe Chezum	9/1/2006
113	107 HYD BLR PRE Hills Elem	HVAC (Htg,Vent, & AC)	Boiler	Hills Elementary	One		56	Joe Chezum	9/1/2006
114	109 PN CONT Hills Elem	HVAC (Htg,Vent, & AC)	Pneumatic Control	Hills Elementary	All		62	Joe Chezum	9/1/2006
								Wayne Grout	9/1/2006

Iowa City PM Schedul...

10:29 AM

SMA will complete the scheduling in PMDirect ...



Preventive MaintenanceDirect - Windows Internet Explorer

http://

File Edit View Favor

Google

Procedures

Step 11 Define

Step 12 Define Parts*

Step 13 Define Journal

Notes*

Step 14 Define Codes & Assignment*

Step 15 Define Frequency*

Step 16 Define Template

Step 17 Setup Schedule

Now

Create Template

Show PM WO's

Monthly Day of every month(s)

The first day of every month(s)

Yearly Every January of every years

The first day of January of every years

Range of Recurrence

Start

No end date

End after occurrences

End by

School Event Exceptions

Please check the events below for which you want to EXCLUDE PM Work Order generation. This means generating a PM work order will be skipped if an event is scheduled at the assigned location. For example, you could setup a Custodial Cleaning PM Schedule that excludes generating PM work orders during summer break. PM Schedules assigned all locations reviews school events assigned to all locations.

1. January

2. February

3. March

4. April

5. May

6. June

7. July

8. August

9. September


10. October

11. November

12. December

Previous Step Next Step

Home Calendar New Schedule Account Settings

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Click here to talk to an Online Operator NOW!

Email 

CIP:24.15.141.238
SID:CST04
DID:17
CUA:MSIE 7.0

Done

start Tasks - Microsoft ... Preventive Maint... 1 SchoolDude PM... IslandWood PMD ... SchoolDude PMD ... SchoolDude PMD ... Microsoft PowerP... 100% 11:48 AM

School Event Exceptions can be used to schedule odd sequences as shown here; this PM will generate in April and December.



Preventive MaintenanceDirect - Windows Internet Explorer

Planned maintenance labor time estimates are graphically noted in PMDirect for the next three months

Home | Calendar | **New Schedule** | Account Settings

Search for: GO

Advanced Search | Help

Quick Launch

[Create PM Schedule](#)
[Print PM Work Orders](#)
[User Forum](#)

- PM WO's generated on **8/16/2008** for work through 8/16/2008
- Next generation is 8/17/2008

LOGIN HERE

Hello Michael Stapleton!
 If you are not Michael Stapleton please click [here](#).

PM Work

Period:

176 New Request
 100 Work In Progress

Projected PM Labor Hours

Month	Labor Hours
Sep-08	621
Oct-08	815
Nov-08	711

(Note: Graph calculations represent hours for schedules created/updated through yesterday. For up-to-date calculations use "Print Your Schedule" option.)

How's your track record?
 (Actual, Estimated and Deferred Labor Hours)

Information Analysis

- Budget Codes
- Buildings
- Calendar Event Types
- Classifications
- Crafts
- Employees
- Equipment
- Groups
- Locations
- Manufacturers
- PM Schedules
- PM Templates
- PM Work Orders
- Projects
- Projected Purchases
- Saved Actions
- Suppliers
- Types

In Definition Stage
 No PM Schedules in definition stage.

start | 1 SchoolDude PMD - MD | Job Corps SchoolDud... | Oak Park Service Ven... | SchoolDude PMD Pres... | Deerfield, IL - Google... | Preventive Maintena... | 1:25 PM



Preventive MaintenanceDirect - Windows Internet Explorer

http://app10.schooldude.com/toolbox/mydtpm/mydtpm_s/mydtpm_calendar.asp?nMonth=11&nYear=2010&locid=a

Convert Select

Google

Favorites

ReadyTalk Conferencing Preventive Maintenance

Home Calendar **New Schedule** Account Settings

Search for: GO

Advanced Search | Help

Calendar Shortcuts

PM Schedules Day View Organization Event Calendar Get Weather

Select Month/Year
November 2010

Print This!

Location: -- Include ANY Locations --
 Classification: -- Include ALL Classifications --
 Type: -- Include ALL Types --
 Craft: -- Select ALL Crafts --
 Assigned To: -- Include ALL Assignees --

PM Scheduling Calendar for November 2010 [View Legend](#)

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1 (M) NGH DAV (M) NGH SUM (M) SWT GAT (M) WUH TIN (M) WUH TEC (M) ACOM ENG (M) AHU TIN	2	3	4	5	6

Done

Internet | Protected Mode: On 100%

4:17 PM 4/26/2010

Descriptive PM Schedule Titles Help to Show the PM's for Upcoming Months



Planned maintenance work order example complete with the wording established in the Design Meeting.

Date Created: 2/5/2006 12:13AM

PM Work Order ID: 2010		Completion Date: 2/6/2006				
Description	Monthly - AHU Shiloh Park - Refer to PM schedule details.					
Location	Shiloh Park Elementary	Building				
Area		Priority	Medium			
Area Number		Craft				
Custom Category		Type	Air Handling Unit			
Status	Complete	Estimated Hour	1.00			
Assigned To	Scott Lorenz	Requester	Art Batalia			
Estimated Start	2/6/2006	Request Date	2/5/2006			
Est. Completion Date	2/26/2006	Req. Completion Date	2/26/2006			
Budget Code		Purpose Code				
Project Code		Project Description				
Equip Item No.	AHU120	Equip Desc	Air Handling Unit			
Notes						
Purchases To Date: \$0.00						
Date	Inv/Ref	Description	Supplier	Pool	Qty	Cost Each
Labor To Date: 0.25 h						
Date	Name					Hours

Technician Name _____ Date _____ Confirmation _____ Date _____
 www.schooldude.com MaintenanceDirect Printed by Michael Stapleton

Zion Elementary School District 6
 Date Created: 2/5/2006 12:13AM

Page 2 of 2
 Printed on: 3/1/2006

PM Work Order ID: 2010		Completion Date: 2/6/2006	
PM Journal Notes	Date	Notes	Created By
	2/7/05	Filters: [2] 20 x 20 x 2 Belt: 4L560	Ron Lichtenberger

Equipment			
ID	Model # Serial #	Area # Building	Notes
AHU120 Air Handling Unit	HAH-32 YF6D28298	Mechanical Room SR BY 120	

Task Completed	Description / Procedures
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	1 AHU De-energize, lock out, and tag electrical circuit. Replace filters Check belts for wear or cracks (replace if needed and record belt(s) used on the PM work order. Check for proper belt tension and alignment if applicable. Check pulley mounting on shaft and wear on grooves Check for any play in bearings by moving fan shaft Check fan vanes and actuator for any loose play Check and clean heating coil as needed Grease fan bearings (two shots of grease) and check grease line for any cracks or splits Check fan motor by manually rotating pulley and listen for any unusual noise. Clean motor, fan, damper blades and fan chamber Check condition of fan motor (paint, corrosion) Check condition of duct work, fan insulation and canvas. Remove tags, and restore to service. Clean up work area and remove trash. Run fan and check for unusual noise or vibration. Record the time taken to service and the material used on the PM work order.

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Technicians

Technicians receive instructions unique to their role as service workers completing the work requests...



Search for: GO
Advanced Search | Help

- Quick Launch**
- ▶ New Request
 - ▶ Your Settings
 - ▶ Labor Hours
 - ▶ Purchase Transactions
 - ▶ Equipment Usage
 - ▶ User Forum
 - ▶ SchoolDude.com site
 - ▶ Saved Actions
- LOGIN HERE**

Hello Kerri Wilson!
If you are not Kerri Wilson please click [here](#).

ASSIGNED WORK

Note: Action Taken is saved when Mark Complete button is clicked.
Sort by Request Age Ascending Descending
Filter -- Select Status --
1 - 2 of total 2 listed

SMA 557 Monthly - Kerri Training & Overhead - Refer to PM schedule details.

Medium **Action Taken**
7/6-talked with mike about CR and
Today's Labor Hours
Mark Complete

Print This! | Email Supervisor | Make a Note

Would like this completed by 7/31/2007
Request Age: 18 (in days)
Assigned to: Kerri Wilson
Contact: Michael Stapleton

Work In Progress

SMA 569 Enter the Site Adm. Principals; the admin.; and secretaries work order status routing requester -to- Principal-to Business Manager -to- Ron DeGeorge Make up a powerPoint for Requesters; Technicians and Principals.

Medium **Action Taken**
7/17-getting info for power point,
Today's Labor Hours
Mark in Progress

Print This! | Email Supervisor | Make a Note

Request Age: 1 (in days)
Assigned to: Kerri Wilson
Contact:

WORK CENTER

- CALENDAR**
- 7/18/2007 WORK (Wednesday)
Get Today's Weather
- ASSIGNED PM WORK** 1
- OTHER ASSIGNED WORK** 1
- TOTAL ASSIGNED WORK** 2



Follow-up Adjustments:

SMA will cover all the aspects of our set-up process with school employees. Key employees need to be identified who will learn how to add equipment to PMDirect, edit templates and establish a planned maintenance schedule. Many times we will work through a number of PM enhancements as a way promoting the continual improvement potential in PMDirect.



Questions ???

Jed will summarize the chat box questions ... we'll do our best to answer. If you still need more information please contact us.

Mike Stapleton

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