Creating a PM Schedule: Full Schedule Form

The PM schedule form includes 18 steps, however you do not need to fill in all steps in order to create a schedule. We will go over every step here to show you what information can be included in each. See the Just the Basics Schedule guide for information on entering just the required and recommended steps to get your schedules entered quickly.

Click on the New Schedule tab at the top of your screen.

PM Schedule Steps

Step 1. Enter PM Schedule Title
Enter a Title for this schedule. You want to be as specific as possible when naming your schedules. It’s a good idea to use the initials or abbreviation of the location, the classification or type, and the frequency. For example "RHWS Qtrly Boiler Inspec." Click Next Step.

Step 2. Select a Classification
You will need to select a classification based upon the type of inspection or work you want to perform.

Step 3. Select a Type
The type further identifies what type of inspection or equipment you might need to PM.

Step 4. Select Manufacturer
You can generally skip this step as you may not need to get this specific. This step can be used to enter a specific manufacturer for the equipment needing to be maintained. This will exclude any equipment with a different manufacturer or no manufacturer listed on the equipment form.

Step 5. Select the Location
Select the Location where you need to perform the PM work. *Note: We recommend always selecting a single Location (rather than choosing All Locations) on every schedule for more effective reporting.

Step 6. Select Building
If you have a Building associated with the Location, you can choose the specific Building here.

Step 7. Select Equipment
If you are performing a “Non-Asset” inspection like a safety inspection, you do not need to choose any equipment in this step. However, if you want to have the equipment displayed on the PM work order or you want to track cost or a history of work done for your equipment, you will need to select it here.

*Note: The only equipment that will be listed here are the pieces that match the selections you have made in the previous 5 schedule steps. If you do not see the piece of equipment you are looking for, check those steps and the equipment form for discrepancies.
Step 8. Select PM Template
Templates are tools that can be used as data entry shortcuts to help you create schedules faster. Your account is preloaded with SchoolDude Starter templates and you can create your own templates. These templates will provide you with a basic set of tasks in Step 11. You can still add to or edit these tasks. If you do not find a template you want to use, you can simply click Create My Own Schedule.
*Note: To view the PM Template Library, you must use the Internet Explorer web browser.

Step 9. Define Job Start Up
Enter any procedures that need to occur prior to the work taking place.

Step 10. Define Safety Points
Enter all safety information and procedures that need to be followed when performing this work.

Step 11. Define Tasks & Procedures
Enter the tasks that need to be performed for this work. The tasks created here will be printed on the actual work order. This serves as your check list for the work that needs to be done to perform the inspection.

Step 12. Define Tools
Enter any tools needed to perform the work.

Step 13. Define Parts
Enter any parts that need to be purchased or taken from inventory every time this work is done.

Step 14. Define Journal Notes
Journal notes can be used to make notes to other staff members who may work on this equipment. It can also be used to set up an email reminder.

Step 15. Define Codes & Assignment
You can choose to go ahead and assign the PM work to a specific technician or you can choose to let the system automatically assign it based on the routing rules setup in MaintenanceDirect. If you assign the work to a technician it will automatically generate as a “Pending” status in MD assigned to that technician. If you let the system automatically route it, it will come into MD as a “New Request” on the home page. You can also select the Craft, Budget, Project and Custom Category codes that will appear on the work orders from this schedule.

Step 16. Define Frequency
This is a required step. You must select how often you would like this schedule to generate a PM work order. We recommend Recurring Calendar Event. You can select Daily, Weekly, Monthly, or Yearly options:

- **Daily** - Select either Every (_) day(s) or Every Weekday. **Example**: For work that needs to be done every day including weekends, enter Every (1) day.

- **Weekly Recur every (_) week(s) on (day(s) of the week). **Example**: For work that needs to take place every other Monday, enter Weekly Recur every (2) weeks with a check mark in the box next to Monday.
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- **Monthly**
  - Day (__) of every (__) month(s). **Example:** For work that needs to take place on the 15th day of every month, enter Day (15) of every (1) month.
  - The (first) (Monday) of every (__) month(s). **Example:** For work that needs to be done on the first weekday of every quarter, enter The (first) (weekday) of every (3) months.

- **Yearly**
  - Every (January) (__) of every (__) year(s). **Example:** For work that needs to take place on October 15th every year, enter Every (October) (15) of every (1) year.
  - The (first) (day) of (January) of every (__) year(s). **Example:** For work that will be done on the first weekday in May every other year, enter The (first) (weekday) of (May) of every (2) years.

In the **Range of Recurrence** field, enter the date you want the schedule to start generating PM work orders. If this is a temporary schedule, you can set an **End Date** to the right of the Range of Recurrence.

**Step 17. Create Template**
If you chose an existing template in Step 8, generally you would want to skip this step as you do not need to create another one. However, if you modified the schedule to your specific inspection you could create a new template for it here. You want to name your template something basic, such as "Quarterly Boiler Inspection". If you created your own schedule you may want to save it as a template here so that it can be used to create more schedules for other locations.

**Step 18. Setup Schedule Now**
This is a **required** step and the final step to creating your schedule. This step shows the selections you made on the schedule. Make sure these selections are correct, and then click **Setup Schedule Now**. This schedule is now an active running schedule that will create PM work orders in your MaintenanceDirect account.

**CONTACT US**
Got questions? Answers are what we’re here for.
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