PMDirect Schedule: Just the Basics

The Dude Says:

Although there are 18 steps on the schedule creation form, you only need to fill out a few to start creating beneficial schedules in your account. In this guide, we’ll cover the basic required and recommended steps for entering your PM schedules quickly. You can always come back to add more information to your schedules as needed. Please call the Client Service Center if you have any questions.

Once you are logged into PMDirect, click on the New Schedule tab at the top of your screen.

Step 1: Enter PM Schedule Title
This is a required step. Enter a Title for this schedule. You want to be as specific as possible when naming your schedules. Example: Enter the initials or abbreviation of the location, the classification or type, and the frequency (Admin-AHU-Quarterly). Click Next Step.

Step 2: Select Classification
This is a required step. You must select the classification of equipment or building system for the schedule you are entering. Your screen will automatically refresh to the next step.

Step 3: Select Type
This step is not required, but recommended as it helps you narrow the definition of the work that needs to be done. The Classification selected in Step 2 is usually a broad term and the Types in Step 3 are subcategories of those classifications. You may want to select a Type depending on the schedule you are creating. Click on Step 5.

Step 5: Select Location
Select the specific location where this PM work will be performed. This is helpful to use when you have multiple locations that need separate work orders. Your screen will automatically refresh to the next step; click on Step 8.
Step 8: Select PM Template

Your account has been loaded with SchoolDude Starter Templates that can help you quickly create your schedules. Note: To be able to view the template library, you must use Internet Explorer as your browser. Click on the red book to see if there is a template that you can use for your schedule. Keep clicking on the books in the tree to get down to the task list of the template.

If you see a template you would like to use for your schedule, click the Copy Selected Template button. You will notice that information, such as the list of tasks, will automatically fill in the appropriate schedule steps. You can go into those steps (marked with a red checkmark) and make additions or modifications to the information added from the template.

If you do not want to use any of the templates, click the Create My Own Schedule button.

Click on Step 11.

Step 11: Define Tasks & Procedures

If you copied a template, verify that the tasks are listed and make any necessary changes. If you did not copy a template, enter your own tasks. Click Next Step to save. Then click on Step 16.
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. 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.*

- **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.

Click **Next Step** to save.
Step 17: Create Template

If you created an original schedule where you entered your own tasks and will need to use this schedule again for a different location, you will want to save it as a template. This template will then show under Step 7 for you to use in creating new schedules. Note: If you copied a template in Step 8 and made no changes to the task list or other steps, then there is no need to save it as new template. You can click on Step 18 to skip the template step.

To create a template:

- Select a Template Book where this template will live. You can select the default My Standard book or you can create your own Template Book. If you create your own, enter a generic and easy to understand title to help you find the template you need later on.
- Under the Template Title, enter a generic template title (such as AHU Quarterly or Exterior Lighting Inspection.)
- Click Create Template Now. The next screen will confirm that your template has been created. Click Next Step to move to Step 18.

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.