

## OSU Preventive Maintenance Approach

As OSU builds the PM program within Energy Services, Zones and Landscape Services, the Preventive Maintenance Specialist should follow this general process to setup AiM in a well-coordinated manner.

### Newly Created Assets

There are many shops and individuals in Facilities Management that will establish asset records in AiM. Depending on the method used to create an asset record, an initial review process may be required. There are two methods for creating assets in AiM:

- **Using the AiM Application**

Energy Services, Landscape Services and certain other individuals will establish asset records directly in AiM. When they do so, they will make sure the assets are labeled and then set the status of the asset to ACTIVE. They will also add related documents, images, etc. ***Until the time comes to create a PM program for the assets, no action is needed by the PM coordinator.***

- **Using the New Asset Form for Data Collection in the Field**

Accessed via mobile devices,

<https://workorder.okstate.edu/NewAsset/>

Zone workers will collect asset information in AiM as they perform maintenance activities using this simplified form. This will allow workers to easily record assets in AiM, but the records they create will lack detail. Once created, workers will affix labels to assets and created labels. Labeled assets will appear on appropriate manager's AiM WorkDesk.

New Building Assets	
■	972 Asset Management ~ Master Asset Profile ~ Z2 NEW ASSETS PENDING LABELS
■	562 Asset Management ~ Master Asset Profile ~ Z2 LABELED PENDING ACTIVATION

The **Zone Manager** will update information as needed and set the asset status to **ACTIVE**.

### PM Program Coordinator Steps

1. **Run the NEW ASSETS-READY FOR PM Report.**

This report will show a list of assets that are ACTIVE, NOT already setup on a PM Template, where the asset record's SCHEDULED PM setting is YES.

2. Schedule a meeting with the supervisor or manager responsible for maintenance of the asset(s)

3. The PM Program Coordinator with the shop Supervisor’s advice will:
  - a. **Review assets, ensuring that all the information is present and accurate.**  
Including pictures, related documents, attributes, locations services and account setup (equipment asset only). [Training Guide: AM-03-AiM Asset Definition](#)
  - b. **Create or select a PM standard (or multiple PM standards) for the assets.**  
[Training Guide: PM-01-Preventive Maintenance Standards](#)
  - c. **Create PM Template(s) as needed and associate assets.**
  - d. When incorporating newly created assets into your PM program, run the **Tmp-By Property/Shop** report. This report shows existing assets in the PM program. Review this report with the Supervisor to ensure that the new assets you add to PM templates are consistent with similar assets already setup in that building.  
[Training Guide: PM-02-Preventive Maintenance Templates](#)
  - e. **Run the PM Schedule Date Generator.**
  - f. Generate dates for the newly setup assets. Then re-run the **Tmp-By Property/Shop** report to review the full list of assets in your PM program, max projected scheduled dates, etc. [Training Guide: PM-04-Schedule Date Generator](#)
  - g. **Other Helpful Reports.**
    - To view PM program details by asset group, run the **Tmp-By Asset Group/Shop** report. Useful for troubleshooting and verifying projected dates for like assets.

Property	Frequency	Asset Tag	Last Date Generation	Max Projected Date	PM Template	PM Standard	Template Description	Template Phase Description	Work Code	Status	Primary Person
POWER PLANT / ECWP	ANNUAL	14590	Jan 5, 2015, 12:00 AM	January 5, 2016	1055	PROD-CHILLER1 A	PM FOR ECWP CHILLERS	ANNUAL PM CHILLER	CHILLED WATER PRODUCTION	OPEN	

- View the PM program for a specific asset, run the **Tmp-Detail w/Checkpoints**.

Preventive Maintenance Templates by Asset and Checkpoints				
Asset	Asset Description			Asset Group
14586	CHILLER 1 - EAST CHILLED WATER MAIN FLOOR; SW CORNER			CHILLER
Template	Shop	Phase	Last Date Generation	Frequency
1055	UTILITIES PRODUCTION	001	Nov 3, 2014, 12:00 AM	ANNUAL
<b>PM Standard:</b>		<b>PROD-CHILLER1 A</b>		
<b>PM STANDARD: ECWP CHILLER #1, #3, &amp; #4 (ANNUAL)</b>				
Checkpoint	Checkpoint Description		Estimated Labor	Measurement
01	CHECK DISCREPANCY SHEET OR WORK ORDER WRITE UPS.		0.15	Y

4. **Generate PM Work Orders.**
  - a. The PM Program Coordinator will generate PM work orders by building or shop at an appropriate frequency (*monthly, semi-annual etc.*)  
[Training Guide: PM-06-PM Generator](#)