

GETTING STARTED: PMDIRECT

MAINTENANCE
MANAGEMENT



PMDirect is a Cloud-based preventive maintenance scheduling solution that helps you schedule recurring maintenance tasks and generate corresponding work orders within MaintenanceDirect. Preventive maintenance, like scheduling repairs and upkeep, ensures that problems are identified before they become emergencies. Here's what you need to get started with your account:

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CONTACT US

Got questions? Answers are what we're here for.

Phone: 877.868.3833 – 8:00 am to 6:00 pm EST

Email: support@schooldude.com



Logging into PMDirect

- Open your web browser and type pmd.schooldude.com into the address bar and hit the Enter key. Bookmark this page or create a shortcut on your desktop to make it easy to come back to this page later.
- On the Account Login screen, enter your **Login Name** and your **Password**.
- Make sure that **PMDirect** is selected in the Go To box.
- Click **Sign In**.
- Be sure to check out the announcements to the right each time you log in. We will post important updates, articles, and events here.

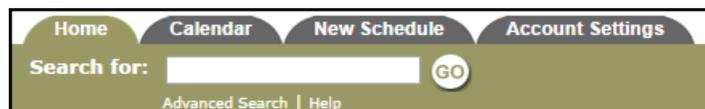
PMDirect Home Page

My Account Link



- The **Quick Links** drop down box is used if you are a user in multiple SchoolDude applications, you can select the application from the list to jump between the different programs.
- Click the **Logout** link in the far right corner of the page to exit the system.
- Click on the **My Account** link to go to your personal information page, where you can change your password or update your information.
- The **Help** link gives you all the available help options needed to answer your PMDirect questions.

Home Page Banner



- The tabs at the top of the screen help you navigate to important areas of the application.
 - **Home** - takes you to the PMDirect home page.
 - **Calendar** - takes you to the Calendar page where you can view past and upcoming PM work that is currently scheduled by Location, Classification, Type, Craft, or Assigned To.
 - **New Schedule** - where you can enter a new PM schedule.
 - **Account Settings** - where you can set up certain aspects of your PMDirect account.
- The **Search For** box under the Home tab can be used to find a specific PM schedule. Enter a keyword to bring up a list of PM schedules associated with that term.

- The **Advanced Search** link takes you to a more advanced search form where you can select multiple criteria to find the schedule you are looking for.

Projected PM Labor Hours

- The center section of your PMDirect home page graphs the amount of PM labor hours projected for the next three months.
- The hours are calculated by adding the Estimated Hours entered in Step 15 of any PM schedule that is scheduled for that month.
- The graph is helpful when adding new PM schedules to see which months allow for more time to be spent on PM work than others.



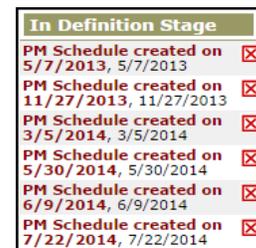
Information Analysis

The Information Analysis section on the right side of the home page gives you links to all the major components of PMDirect. You can click on a link to view, add, and report on that specific information. Access lists of your PM Schedules, PM Templates, and PM Work Orders by clicking on the corresponding link.



In Definition Stage

- Schedules listed under the In Definition section are schedules that have been started but not completed.
- These schedules are not yet active and will not generate work orders.
- If you start a PM schedule and do not get a chance to finish it, it will be listed here.
- You can edit the schedule by clicking on the title and completing the unfinished steps, or delete the schedule by clicking on the red x.



What's New?

Keep an eye out for announcements in the **What's New?** section on the left side of the home page. We'll post new product features, office closures, and more in this section.



Quick Launch

This section displays shortcut links to different functions of the system.

- **Create PM Schedule** - Shortcut link to enter a new Preventive Maintenance Schedule.
- **Print PM Work Orders** - Shortcut link to the Batch Print feature for PM work orders.
- **User Forum** - Use this link to ask other PMD users for peer input on questions about using the application or any other industry questions.

PM Work

- The PM Work section breaks down all of your PM Work Orders by Status.
- Use the **Period** drop down box to narrow the time frame of the requests.
- Click on the number beside any status to show a list of those PM work orders.

PM Work
Period
All
388 New Request
94 Work In Progress
18 Complete
271 Closed Work Orders

Next Schedules to Generate

- This section at the bottom of the left side of the home page lists upcoming work orders that will be generated from your PM Schedules.
- You can click on the frequency link in red to access the schedule that will generate the next work order, or click on the last WOID number that was last generated from that schedule to access the work order details.

Next Schedules to Generate
[Show next 10 days](#)
PM WO on: 3/12/2015
Daily, Event Setup
ND Elementary Last PM
WO: 39049
Daily, Event Setup
ND Middle School Last PM
WO: 39050
Weekly,
Heating/Ventilation /Air
Conditioning
Jett High School Last PM
WO: 39005



The Account Information page allows you to identify important and helpful information about your organization and your PMDirect account.

How to set up the Account Information

- Click on the **Account Settings** tab.
- Click on the **Account Settings** link.
- The **Time Zone** and **Current Server Date/Time** are populated based on your organization's address.
- **Comptroller** shows the user currently listed as the PMDirect Comptroller.
- The **Purpose Code** you select will automatically populate on your preventive maintenance work orders created by PMDirect. **Preventive Maintenance** is most commonly selected here.
- In the **Budget Code** drop down menu you can select a budget code that will automatically populate on all of your PM work orders that are generated by PMDirect. If you have a designated budget code allocated for preventive maintenance work, select it here.
- In the **Current Period** fields, enter your organization's Fiscal Year Begin and End dates.
- Select a user in the **Requested By** drop down menu that you would like listed as the Requester for all new PM work that will generate from PMDirect.
- Check the box to **Yes, automatically generate inventory issue transactions when creating PM work orders** if you also own InventoryDirect. This will allow your PM Schedules with Inventory items listed in Step 13 to automatically create an InventoryDirect Issue Transaction when the PM Work Order is generated. If you have InventoryDirect and do not check this box, then any inventory items listed on your schedules will come through as Inventory Requests rather than Issue Transactions.
- Click **Submit** to save.

Account Information

You may select the purpose and budget code from the list or leave empty.

Your Time Zone
EST (GMT-05:00-US & Canada)

Current Server Date/Time
3/10/2015 10:21:03

Comptroller
New Dude

Purpose Code
Preventive Maintenance

Budget Code
-- Select Budget Account --

Current Period (Fiscal Year Begin/End)
7/1/2014 - 6/30/2015

Requested By (Default requested by for New PM WO's.)
Wise University, Administrator

Yes, automatically generate inventory issue transactions when creating PM work orders.

PM Work Orders taking longer than days to complete are considered deferred work.
(Note: A zero entry means this calculation will not be applied when calculating deferred work. This is reflected in the "How's your track record?" graph option shown on PMDirect's home page. This option setting does not affect the status of PM WO's.)



The Generate PM's On setting activates your account to begin creating PM work orders. It is also where you will set how often the SchoolDude servers will generate those work orders for you. PMDirect will automatically generate PM work orders based on the schedules that you enter into the system. These work orders are generated at midnight each night into your MaintenanceDirect account.

Generate PM's On Set Up

- Click on the **Account Settings** tab.
- Click the **Generate PM's On** link in the Account Settings Shortcuts at the top of the page.

Account Settings Shortcuts				
Account Setup Steps	Account Info	Logo Setup	Generate PM's On	Role Setup
ID Manage Codes	User Login Log	PM Users	Copy Schema	
ID About Combo				

When should preventive maintenance work be generated?
Note: PM work orders are generated each night. The results can be emailed directly to you (see below).

Begin auto generation date

Please specify the first date PM WO generation should start, once you have this date specify you cannot change it in the future.

Generate PM Work Orders every days and days ahead of their due date.

Yes, create new PM WO even when there is a work order in-process, not completed/closed.

Note: Creating future PM WO's will require PM WO's to be generated with non-complete/closed PM WO's. Check "Yes, create new PM WO even when outstanding work order has not been completed/closed." if you want to create multiple future PM WO's for the same schedule.

Yes, send a notification when PM WO's are created to this email address

- Select the **Begin auto generation date**. This is the date that the SchoolDude servers will begin to check your active PM schedules for work orders that need to be generated. Once you set this date, it cannot be changed.
- Decide how often you want PM work orders to be generated by filling in the following blanks: **Generate PM Work Orders every __ days and __ days ahead of their due date**. This tells the system how often to check the schedules for work that needs to be generated as well as how much lead time you want before the scheduled due date.

The Dude Says:

We recommend setting this to Generate PM Work Orders every 1 days and 0 days ahead of their due date. This means that the system will check every day for work orders that need to be generated and that they will be created on the date you specify in the Frequency step of the schedule.



- Decide whether or not you'd like for a **new PM work order to be created, even if there is a work order still in-process and not completed/closed** from the same schedule. Indicate your decision by using the check box provided. If left unchecked, the schedule will not create a new work order until the previously generated work order has been marked complete or closed. **Note: We recommend checking this box to ensure that you do not miss future work orders due to potential clerical errors.*
- Check the last box if you want an **email to be sent when the system creates a batch of PM Work Orders**. Enter the recipient's email address in the field. **Note: This is helpful if you are printing out the PM work orders for your technicians. One person will be notified that a batch was created and can then log into the system to print them out.*
- Click **Submit** to save your selections.



Locations that need to be added into PMDirect are Locations where you will be performing PM work. Locations that have been entered into MaintenanceDirect, or any other SchoolDude application you may be using, will carry over to PMDirect and can easily be activated if you wish to use that Location in PMDirect as well.

Activating Locations

- Click on the **Account Settings** tab.
- Click on the **Locations** link.
- You will then see a list of **My Locations**. The Locations listed here are Locations that have been setup in any other SchoolDude application you are using.
- To activate a Location, click on the gray thumbs-down icon (👎) next to that Location's name.
- When the page refreshes, the icon will be changed to a yellow thumbs-up (👍) to indicate that the Location is now active in PMDirect.

My Locations						+ Add New Location
11 - 20 of total 43 listed						Previous 10 Next 10
Location	# Students	Sq.Ft	Date Built	Fiscal Yr	PM	
# Active PM Schedules	PM Cost/Student	PM Cost/SqFt	Facility Age	Estimated Costs		
👎 Dude Hall East 0	750 \$0.00	7000 \$0.00			\$0.00	
👍 Dude High School 3	2000 \$0.11	112000 \$0.00	1/1/1990 25 years		\$218.76	
👍 Dude Middle School 1	550 \$0.00	12000 \$0.00			\$0.00	
👍 East Campus 0	1012 \$0.00	136788 \$0.00	7/1/2001 13 years		\$0.00	

How to add new Locations

- From the My Locations list, click on **+ Add New Location** in the right hand corner.

My Locations						+ Add New Location
11 - 20 of total 43 listed						Previous 10 Next 10
Location	# Students	Sq.Ft	Date Built	Fiscal Yr	PM	
# Active PM Schedules	PM Cost/Student	PM Cost/SqFt	Facility Age	Estimated Costs		

- The **Location Code** is only used for database purposes and does not appear on any pages or reports. If you do not enter a Location Code, the system will generate one for you.
- Enter the **Location Description** (the name of the facility or campus).
- Enter the **Number of Students**, **Square Footage**, **Date Built** and any **Notes** for this location. This information is not required and can be added at any time.
- If you are using **Budget Codes**, you can assign one to the location by selecting it here.

- Click **Add/Update Record** to save. **Note: If you add a new location to PMDirect, don't forget to log into MaintenanceDirect to activate the location in that application.*



Buildings that need to be added into PMDirect are the individual free-standing structures at each of your Locations where you will be performing PM work. Buildings that have been entered into MaintenanceDirect, or any other SchoolDude application you may be using, will carry over to PMDirect and can easily be activated if you wish to use that Building in PMDirect as well. **Note: If you are not using Buildings in your MaintenanceDirect account, then you do not need to add Buildings to PMDirect.*

Activating Buildings

- Click on the **Account Settings** tab.
- Click on the **Buildings** link.
- You will see a list of **My Buildings**. The Buildings listed here are Buildings that have been set up in another SchoolDude application you are using.
- To activate a Building, click on the gray thumbs-down icon (👎) next to that Building's name.
- When the page refreshes, the icon will be changed to a yellow thumbs-up (👍) to indicate that the Building is now active in PMDirect.

Name	Location	Sq. Ft.	*Calendar Cost YTD	*Fiscal Cost YTD
👎 Administration Bldg.	East Campus	500	\$0.00	\$0.00
👎 Agriculture Building	Chatham Central High School	1000	\$0.00	\$0.00
👎 building 1	SW Elementary	1200	\$0.00	\$0.00

How to add new Buildings

- From the My Buildings list, click on **+ Add New Building** in the right hand corner.

Name	Location	Sq. Ft.	*Calendar Cost YTD	*Fiscal Cost YTD
------	----------	---------	--------------------	------------------

- Select the appropriate **Location** from the drop down box.
- Enter the **Building Name**, **Square Footage**, and **Number of Students** for this building. Square Footage and Number of Students is not required and can be added at any time.
- Click **Save**. **Note: If you add a new building to PMDirect, don't forget to log into MaintenanceDirect to activate the building in that application.*



Crafts define the type of preventive maintenance work that is being requested. Crafts give you a way to track and report on the type of preventive maintenance work your maintenance department is doing. (Example: HVAC, Fire Protection, Health/Safety, etc.) PMDirect has a predefined list of Crafts and you only need to activate the ones that apply to your preventive maintenance work.

The Dude Says:

Make sure that the Crafts you activate in PMDirect, are also activated in MaintenanceDirect for tracking and reporting purposes.



How to activate Crafts

- Click on the **Account Settings** tab.
- Click on the **Crafts** link.
- This brings you to a list of the available Crafts. To activate a Craft, click on the gray thumbs-down (👎), the page will refresh and the icon will change to a yellow thumbs-up (👍) to show that it is now activated. **Note: We recommend activating a few basic crafts (fire protection, hvac, etc.) to start. It is easy to activate more later on, but it is more difficult to remove crafts after they have been in use.*

Craft List		
1 - 20 of total 291 listed		
		◀ Previous 20 Next 20 ▶
Craft	# PM Schedules	Estimated Cost
👎 Advertisements	0	\$0.00
👎 Air Conditioning	0	\$0.00
👍 Alarm	0	\$0.00



Classifications and Types are used to categorize equipment or building systems into higher level (Classification) and lower level (Type) groupings. Classifications are required in order to create a PM schedule. Classifications and types can be added manually or you can import one of the predefined schemas that SchoolDude provides. If you do choose to import a schema, you still have the ability to add to, edit, and delete the imported entries. Examples: Classification=HVAC, Type=Air Handling Unit; Classification=Lawn Equipment, Type=Lawn Mower; etc.)

Adding Classifications

- Click on the **Account Settings** tab.
- Click on the **Classifications** link.
- In the right hand corner of the My Classifications list, click on **+ Add New Classification**.
- Select a **Group** if you choose to group your Classifications. **Note: Groups are an additional tier of grouping Classifications and Types. This level of grouping is optional.*

Add/Update Classification

Group: -- Select Group --

Description HVAC (characters)

This is your current icon, change it below.

Icon Image Choose File No file chosen

Submit Delete Record

- Give your Classification a name in the **Description** field.
- If desired, chose an **Icon Image** you'd like associated with this Classification. Icons will appear with the Classification when adding a new schedule.
- Click **Submit** to save.

Adding Types

- Click on the **Account Settings** tab.
- Click on the **Types** link.
- In the right hand corner of the My Types list, click on **+ Add New Type**.
- Select the **Classification** that this Type will be tied to.

Add/Update Type

Classification HVAC

Description Air Handling Unit (characters)

This is your current icon, change it below.

Icon Image Choose File No file chosen Delete Icon

Submit

- Give your Type a name in the **Description** field.
- If desired, chose an **Icon Image** you'd like associated with this Type. Icons will appear with the Type when adding a new schedule.
- Click **Submit** to save.

Adding a Schema

Schemas are a predefined list of Groups, Classifications and Types that can be automatically imported into your PMDirect account.

The Dude Says:



Once you copy a schema into your account, it will be difficult to undo so **please make sure that you want to use that particular schema before selecting it.** If you choose to use a predefined schema, you can still add, modify, and delete Classification and Types to customize the list for your organization. You will not be limited to only use the items in the schema that is copied.

- Click on your **Account Settings** tab.
- Click on **Copy Schema** from the Account Settings Shortcuts menu.

Account Setup Steps	Account Info	Logo Setup	Generate PM's On	Role Setup
ID Manage Codes	User Login Log	PM Users	Copy Schema	
ID About Combo				

- Select the **Code Schema** that you would wish to use. You can view the list of Groups, Classifications and Types that will be imported into your PMDirect account if you choose that schema by clicking on **View Code List**.
- Click **Submit** to save.



You can enter your equipment information into PMDirect to be able to track costs and history of work done to specific pieces of equipment. **Entering equipment in the system is NOT required to begin creating PM Schedules. Many clients prefer to start out by creating non-asset based PMs.**

The Dude Says:



SchoolDude highly recommends starting with non-asset PMs, such as inspections, when creating new schedules for your account.

If you do choose to do asset-based pm work, prioritize which assets you want to include (most expensive, critical to operations, etc.) You can add equipment information little by little as you go along. You can also add equipment to existing schedules at a later time.

SchoolDude also offers consulting and import services that can help get information, such as equipment, into your account quickly. **Contact us at 1-877-868-3833 for more information.**

Entering Equipment

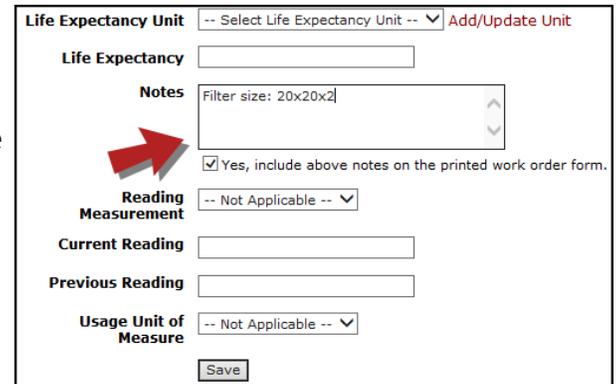
- Click on the **Equipment** link in the Information Analysis section of the home page.
- Click the **+ Add New Equipment** link at the top right of the equipment list.
- The **Item Number** is the only required field on the Equipment form. **Note: The item number should be descriptive enough that it tells you what the piece of equipment is and where it is located (Ex: Boiler_001_HS). Consistency in your naming convention will help you locate equipment more easily in the future.*
- Several other fields are highly recommended when you are planning to attach pieces of equipment to your PM Schedules:
 - **Classification**
 - **Type**
 - **Location** (also Building if you are using this field in your account.)

The screenshot shows the 'Add/Update Equipment' form with the following fields and values:

- Item Number**: Boiler_001_HS (Red arrow pointing to the field)
- Classification**: Mechanical/Heat-Generation Equipment
- Type**: Heating Boilers & Accessories (Red arrow pointing to the dropdown)
- Description**: (Empty field)
- Manufacturer Or New Manufacturer**: -- Select Manufacturer -- (Dropdown)
- Supplier Or New Supplier**: -- Select Supplier -- (Dropdown)
- Date Purchased**: (Empty field)
- Original Cost**: 0.00
- Location**: ABC High School (Red arrow pointing to the dropdown)
- Building**: -- Select Buildings -- (Dropdown)
- Area**: -- Select Area -- (Dropdown)

*** Item Number is a primary sort. please use an identifier that will sort your equipment in an understandable way. You can use characters and/or numbers.**

- There are many other fields available to enter as much information about the equipment as needed.
- The **Notes** field can be very useful for information like filter and belt sizes. When you check the box below the field, this information will print on the work order form when you attach this piece of equipment to the PM Schedule.
- Click **Save** at the bottom of the form to save the equipment in the system.



Life Expectancy Unit -- Select Life Expectancy Unit -- Add/Update Unit

Life Expectancy

Notes Filter size: 20x20x2

Yes, include above notes on the printed work order form.

Reading Measurement -- Not Applicable --

Current Reading

Previous Reading

Usage Unit of Measure -- Not Applicable --

Save

The Dude Says:

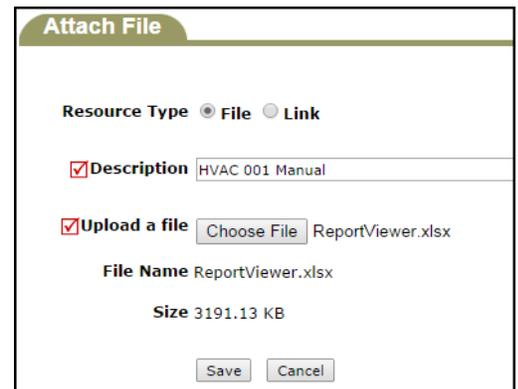


When entering equipment, it is important to include the **Classification, Type, Manufacturer** (if applicable), **Location**, and **Building** (if applicable) information as these fields are used as filters to determine which equipment is available to be selected on a schedule.

Adding Attachments to Equipment

Once you save a piece of equipment, you can then attach or link to manuals, photos of the equipment, and equipment specs. There is a maximum of 5MB of storage for attachments per piece of equipment. You can add as many attachments as needed as long as they do not collectively total over 5MB. For files that are too large, you can attach a link to a URL instead. These attachments are also available when viewing Equipment in MaintenanceDirect and CapitalForecastDirect.

- On the Add/Update Equipment screen for the equipment you just saved, scroll down to the **Attachments** section. Add attachments to existing equipment by selecting it from the My Equipment list page.
- Click **Add New Attachment**.
- In the pop up window that appears, select the Resource Type as either a **File** or a **Link**.
- For a File Attachment, enter a **Description** of the file. Select the file from your computer to **Upload** and click **Save**.
- For a Link Attachment, enter a **Description** of the file to which you are linking. Enter the **URL** and click **Save**.
- Close the pop up window and the screen will refresh to show the file or link listed in the Attachments section.



Attach File

Resource Type File Link

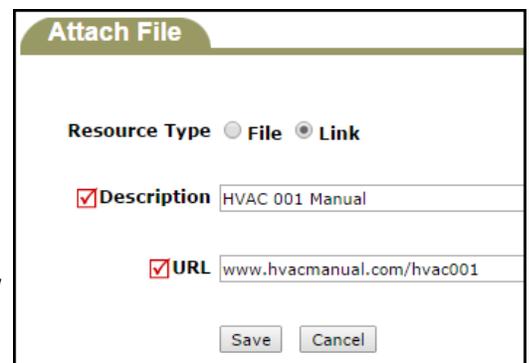
Description HVAC 001 Manual

Upload a file Choose File ReportViewer.xlsx

File Name ReportViewer.xlsx

Size 3191.13 KB

Save Cancel



Attach File

Resource Type File Link

Description HVAC 001 Manual

URL www.hvacmanual.com/hvac001

Save Cancel

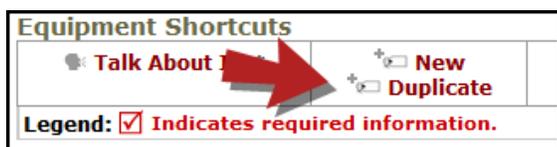
- A paper clip icon will be visible next to equipment with attachments on all Equipment list pages. It will also appear next to the Equipment field on the WO form when a piece of equipment with attachments is selected. Click on the paper clip to view the attachments listed in a pop-up.



Duplicating Equipment

Once you have saved one piece of equipment, you will be able to duplicate it to create more pieces of equipment. This is extremely helpful when you are entering several pieces of equipment of the same type.

- Once you click Save, a **Duplicate** link will appear in the Shortcuts section at the top of the page and a **Duplicate Record** button will appear at the bottom of the equipment form.



- Click either of these to bring up a new equipment form.
- All of the information from the previous equipment record will be copied into this new form, except for the Item Number.
- Enter a new **Item Number** and make any necessary changes to the information.
- Click **Save** at the bottom of the form.



The only user role in PMDirect is Administrator. All users added to PMDirect, will have the same amount of access. The only users that need to be added to PMDirect are those that will be creating new Preventive Maintenance schedules or editing existing ones.

How to add Users

- Click on the **Account Settings** tab.
- Click on the **PM Users** link.
- Click the **+ Add User** link above the right side of your user list.
- If you have users in other SchoolDude applications, you will be directed to a **Registered Users** page. The Registered Users drop down list will show all users in other SchoolDude applications that are not users in PMDirect. If the person you wish to add is in that list, select their name and click **Add This User**. **Note: Always check the **Registered User** list before adding a new user.*
- If the person is not in the list, click the **New User** button.



Adding Registered Users

- After clicking the **Add This User** button.
- Check the box if you want this user to be the **Comptroller** for the account. There can only be one Comptroller for the application.
- Click **Next Step** to continue.
- On the **PMD Participant Information** screen, the user's login name, password, and contact information will automatically be pulled over from the information in their other SchoolDude account.
- The rest of the fields on this page are not required and can be added at any time.
- Click **Next Step** to save and the user will be added.

Adding New Users

- Click the **New User** button.
- Check the box if you want this user to be the **Comptroller** for the account.
- Click **Next Step** to continue.
- On the Participant Information screen, you will need to enter a Login Name, Password, First and Last Name, and Email Address for the user account.
- Click **Next Step** to save and the user will then be added.

PMD Participant Information		
Login Name	dudeadmin	<input checked="" type="checkbox"/>
Password	<input checked="" type="checkbox"/> (Minimum 6 characters.)
Confirm Password	<input checked="" type="checkbox"/>
First Name	Dude	<input checked="" type="checkbox"/>
Last Name	Admin	<input checked="" type="checkbox"/>
Email	dudeadmin@dude.com	<input checked="" type="checkbox"/>



PMDirect is an application that allows you to create schedules for your regularly scheduled inspections and recurring preventive maintenance work. It works in conjunction with MaintenanceDirect. The schedules are created and maintained in PMDirect, but all PM work orders created by the schedules live in MaintenanceDirect.

PM Schedules vs. PM Templates

You can create PM Schedules and PM Templates in your PMDirect account. These look very similar but are used in different ways.

- A **PM Schedule** is created to generate work orders for a specific job usually at a specific location. This could be for an inspection or work to a piece of equipment or group of equipment. The most important thing to remember is that a PM Schedule creates a PM work order.
- A **PM Template** is used to help you create PM Schedules more quickly. They outline the details of the work to be performed that is common to a group of schedules. When creating a schedule, you can select a template to fill in some of the steps so you don't have to type the same information over again into multiple schedules. A PM Template does not create PM work orders.

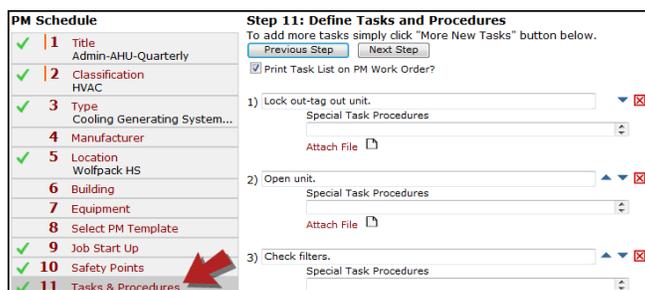
The Dude Says:

It is not required to use templates to create your PM Schedules, but they can be very helpful in getting your account up and running quickly. There are SchoolDude Starter Templates preloaded into every account that you can use right away to start creating your schedules.



Step 11: Define Tasks & Procedures

Enter the tasks needed to complete this job. Click **Next Step** to save. Then click on **Step 16**.



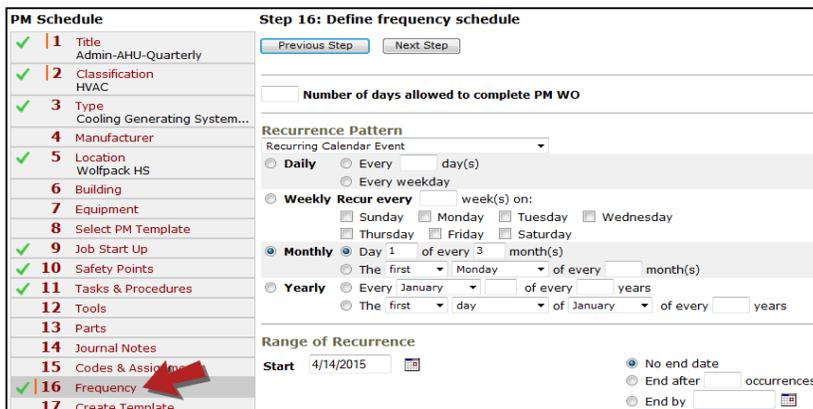
Step 16: Define Frequency

This is a *required* step. You must select how often you would like this schedule to generate a PM work order. 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.*
- **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 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.

Step 18: Summary

Below is your new schedule summary:

Schedule ID:	32284
Schedule Title:	Admin-AHU-Quarterly
Classification:	HVAC
Type:	Cooling Generating Systems
Manufacturer:	not defined
Location:	Wolfpack HS
Building:	not defined
Equipment:	0 piece(s) of equipment defined
Task Procedures:	6 tasks defined
Job Purchases:	0 parts needed for the job
Journal Notes:	0 Journal Notes defined
Recurrence Pattern:	Monthly
Date Schedule Start:	4/14/2015
Date Schedule End:	no end date



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 to 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.*
- **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.



A **PM Template** is used to help you create PM Schedules more quickly. They outline the details of the work to be performed that is common to a group of schedules. When creating a schedule, you can select a template to fill in some of the steps so you don't have to type the same information over again into multiple schedules. A PM Template does not create PM work orders.

When is it a good idea to create a template?

- You may want to create a PM template when you have entered details for a schedule for one location and need to create the same schedule for all of your locations.
- You may also want to create a template if you have used a SchoolDude Starter Template on your schedule but modified it to reflect specific circumstances at your organization. Saving a new template will save you from having to make the same modifications on future schedules.

Creating a PM Template

You can create a template at the same time that you are creating a schedule or from any schedule you have already completed.

- Click on the **New Schedule** tab or open an existing schedule that you would like to create a template from.
- Fill out the schedule steps with the information you would like included in the template. **Note: Location, Building, and Equipment information from the schedule will not be included in the template. Information from all other steps will be included in the template.*
- In Step 17, select the **Template Book** that this template will be saved to. You can use the default My Standard book or create your own template book by selecting that option and entering a name for the book in the field provided. Any new book you create will be available the next time you create a template.
- If you would like to use this template as a Master Template, put a check mark in the box next to **Yes, template will be used as a master**. Checking this box will apply this template to this schedule as a Master as well as make it available to use as a Master Template on other schedules.

Step 17: Create Template

Select a Template Book if you want to make this schedule available in your template book.

My Standard

TC Use Case is a really really long description th

_Cruz Book

HVAC

Create New Template Book

Do not make a template from this schedule

Yes, template will be used as a master. Master templates allow the task list to be shared among multiple schedules.

Template Title

Admin-AHU-Quarterly

The Dude Says:



Master Templates allow you to share the task list among multiple schedules in a way that prevents those tasks from being edited from within the schedules. The benefit to using Master Templates is if you need to edit the task list, you can make the changes in the PM Template and it will change all of the schedules where that template has been used as a Master. You can still create additional tasks from within the schedule, but changing the Master template tasks must be done from within the template.

Master templates can also be used as regular templates where the task list is not locked down. However, if a change is made to the tasks in the template, this change will not carry over to the schedules where this template has not been used as a Master.

- Enter a **Template Title**. This should be descriptive of what the template is for, but should not include Location information. For example, AHU Qtrly Inspection or Fire Alarm Test.
- Click **Create Template Now**.

Viewing and Editing PM Templates

- Click the **PM Templates** link located in the Information Analysis section on the right side of the home page.
- This will bring you to list of the PM Templates you have created.
- Click on the **PM Schedule Template Name** to view the information in the template.
- You can add information to the template by clicking on the appropriate step and entering new text or editing what is currently there.
- Click **Next Step** at the bottom of each step that you edit to save the changes.
- If you need to delete a template, you can click the red next to that template in the list or you can click the Delete button at the bottom of the steps when you open the template to view it. **Note: Master templates cannot be deleted.*

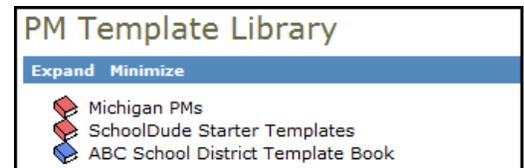


Every PMDirect account is preloaded with the SchoolDude Starter Templates to help you quickly create new schedules. Other templates may also be available for purchase. And any template you create is immediately available to help you create new schedules. **Note: You must use the Internet Explorer web browser in order to view the PM Template Library.*

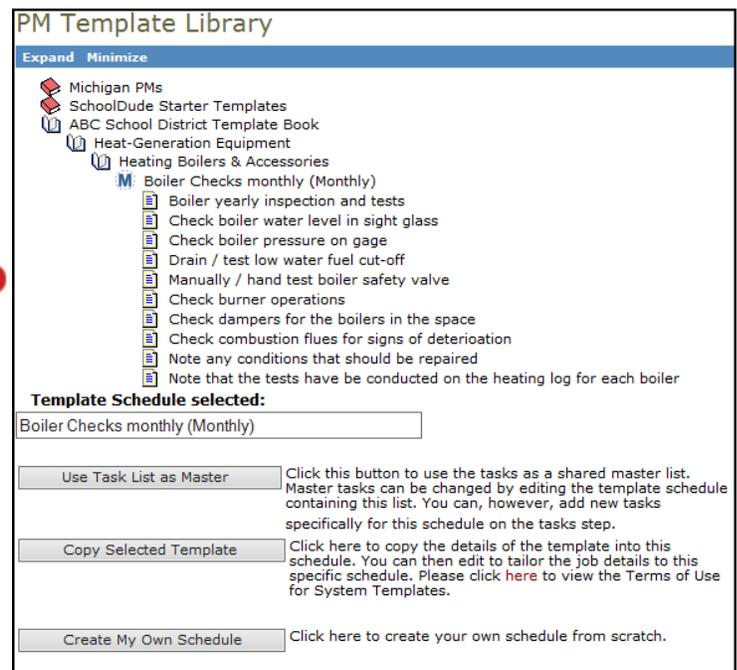
Using a PM Template to create a new schedule

- Click the **New Schedule** tab.
- Enter a PM Schedule **Title** in Step 1.
- Select a **Classification** in Step 2.
- Fill out Steps 3 through 7 as necessary for the schedule you are creating.
- On Step 8, you will see the **PM Template Library**. **Note: You must use the Internet Explorer web browser in order to view the PM Template Library.* Red books

are Template books that have been provided by or purchased from SchoolDude. Blue books are the Template books that you have made to store the templates you have created.



- Click on a book to open it. Drill down until you find a template you want to use and open it to show the tasks.
- The **Template name** will populate the Template Schedule selected field.
- If the Template icon has an **M** on it, this indicates that the template has been saved as a Master template and can be used as such on this schedule. If the template icon has a **T**, this indicates a regular template that cannot be used as a Master.
- If the **Use Task List as Master** button is highlighted, you can choose to use this template as a Master. Click this button to copy the template details into your schedule and lock down the Master task list. Master tasks can only be changed through the template rather than from within the schedule. However, you can add new tasks through the schedule.



- If you do not want to use the template as a Master or if that is not an option, click **Copy Selected Template** to copy the template details into your schedule.
- Once you have selected template and copied it into your schedule, you will see green check boxes marking the steps where the template entered information.
- Click on these steps to check that the information is correct.
- If needed, make additions or modifications to the information entered by the template. Make sure to click **Next Step** on each step to save your changes.
- Make sure the check **Step 15** (Define Codes & Assignment) and **Step 16** (Define Frequency) to ensure they are correct for this schedule.
- Skip Step 17. Since you used a template to create this schedule, you do not need to create another template for it.
- In **Step 18**, click **Setup Schedule Now** to activate the schedule.

8	Select PM Template
✓ 9	Job Start Up
✓ 10	Safety Points
✓ 11	Tasks & Procedures
12	Tools
13	Parts
14	Journal Notes
15	Codes & Assignment
✓ 16	Frequency
17	Create Template
18	Setup Schedule Now
<input type="button" value="Create Template"/>	
<input type="button" value="Show PM WO's"/>	
<input type="button" value="Delete"/>	



SchoolDude is pleased to offer Professional Services. New and existing PMDirect clients can get personalized guidance with a SchoolDude consultant to help streamline the use of PMDirect at your institution. A consultant will work with you to analyze your locations and equipment, and then create preventive maintenance schedules that fit each location's needs.

Optimize your success with SchoolDude

- Get your PM program off the ground quickly, typically within 45-60 days.
- Expertise to assist you in designing and implementing PM schedules based on industry best practices for success.
- A dedicated resource to help you gather equipment, import your equipment, and set up PM schedules in PMDirect.
- Lower safety risks.
- Increase equipment life.

We deliver planned maintenance programs that are customized to your institution, yet involve only minimal time invested from your facilities management team to design your planned maintenance schedules. Preparation time through Implementation time is typically completed within 45 to 60 days.

The result is a turnkey solution for implementing your Preventive Maintenance program. We interface directly with you to customize the PM database to your specific needs and identify resource requirements.

Get Started Today

Learn how you can accelerate your success!

Phone: 877.868.3833 (DUDE)

Email: successplus@schooldude.com

Visit: www.schooldude.com/support/services



Call, Email, or Chat - Reach out anytime

Have a question? Need more information? Contact our Legendary Support Team!

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