

# Standard Operating Procedure

## 03 - Managing Equipment & Associated PMs

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### A. Purpose

This process documents the steps taken to facilitate the management of existing equipment and associated Preventive Maintenance procedures.

### B. Responsibilities

The following Departments participate in this process and are tasked with the following responsibilities:

➤ **Maintenance Manager**

The Maintenance Manager is responsible for the entry, updating & management of Facility identified equipment and the associated PMs. In addition, the Maintenance Manager is responsible for the updating and management of DCAM entered equipment.

➤ **DCAM**

DCAM is responsible for the entry of major capital equipment and the associated PMs, identified through either the CAMIS 2000 survey or other DCAM administered capital projects.

### C. Process Overview

#### ***Maintenance Manager & DCAM***

Step 1: Check for existing equipment record.

Step 2: Check for updates on existing equipment record.

Step 3: If necessary, update existing equipment record.

Step 4: Check for existing PM for equipment.

Step 5: If necessary, update PM for equipment.

Step 6: If a PM exists, make a determination whether the scheduling is correct.

Step 7: If necessary, update PM scheduling criteria.

Step 8: Make a determination for performing the work.

Step 9: Schedule equipment PM Work Order.

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Step 10: Postpone equipment PM Work Order.

Step 11: Perform work.

### D. Process Steps

#### **Step 1: Check for existing equipment record**

- Access Equipment Form by clicking on the form in the Navigator. (EQUIPMENT/EQUIPMENT)
  - ❑ Enter Query Mode (F11)
    - Enter Description (Use % wildcard)
    - Enter Site (Use the List of Values, CTRL/L if needed)
    - Enter Building (Use the List of Values, CTRL/L if needed)
    - Enter Floor (Use the List of Values, CTRL/L if needed)
    - Enter Room (Use the List of Values, CTRL/L if needed)
  - ❑ Execute Query (CTRL/F11)
  - ❑ Cancel Query if no records are found. (QUERY/CANCEL)

#### **Step 2: Check for necessary updates to equipment record based on Query from Step 1**

#### **Step 3: If necessary, update equipment record**

- Update equipment record as needed for:
  - Equipment Category (Use the List of Values, CTRL/L if needed). Notify DCAM CAMIS System Administrator if new Equipment Category is needed.
  - Manufacturer Information (Use the List of Values, CTRL/L if needed)
  - Location Information (Use the List of Values, CTRL/L if needed)
  - Description
  - Keyword, Type, Asset No & Equipment Group (Use the List of Values, CTRL/L if needed)

**\*\*\* To maintain the consistency of equipment hierarchy structure, you should map the rightmost node from the Equipment Category field on the screen into Keyword, second to the rightmost node in the Equipment Category into Type, 3<sup>rd</sup> rightmost node into Group.**

- General Information
- Save changes (CTRL/U)

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### **Step 4: Check for existing PM for equipment**

- Access the PM window by clicking on the [PMs] tab from the Equipment Form
  - ❑ Select the PM to review and click on the [VIEW] button to view PM information
  - ❑ Select the PM to review and click on the [CRITERIA] button to view scheduling information
- Close the PM Window by clicking on X in upper right hand corner
- Close the Equipment Form by clicking on X in upper right hand corner

### **Step 5: If necessary, update PM for equipment**

**\*\*\* PM Procedures are shared among all the facilities under the same Org\_ID. If your Org\_ID involves multiple facilities, any modifications made here will affect all equipment at multiple sites that has a association with this PM.**

**\*\*\* Consider utilizing the OVERRIDE capability described in Step 7 or create a new PM Procedure to reflect your practice. Please refer to SOP 06-New Equipment & New Procedure step 4: New equipment PM record is created for more information.**

- Access the PM Form by clicking on the form in the Navigator. (EQUIPMENT/PREVENTIVE MAINTENANCE)
  - ❑ Enter Query Mode (F11)
  - ❑ Enter PM number
  - ❑ Execute Query (CTRL/F11)
    - Update the PM record as needed for:
      - PM Information
        - Status (Use List of Values, CTRL/L if needed)
          - ◆ OPEN
          - ◆ CLOSED
          - ◆ INACTIVE
          - ◆ SUPERCEDED
        - Asset Type (Use List of Values, CTRL/L if needed)
          - ◆ EQUIPMENT
        - Category (Use List of Values, CTRL/L if needed)
          - ◆ ACCREDITN (accreditation of prisons/hospitals)
          - ◆ ENVIRONMNT
          - ◆ FIRE SAFETY
          - ◆ HAZ MAT
          - ◆ INSPECTION

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- ◆ PREVENTIVE
- ◆ SAFETY
- ◆ WARRANTY (based on mfr. Specifications)
- Manufacturer (*Use List of Values, CTRL/L if needed*)
- Outage Class (*Use List of Values, CTRL/L if needed*)
  - ◆ EQU DOWN
  - ◆ EQUIP UP
- Work Order Information
  - Assigned To (*Use List of Values, CTRL/L if needed*)
  - (Maintenance) Type (*Use List of Values, CTRL/L if needed*)
    - ◆ ADMIN
    - ◆ CORRECTIVE
    - ◆ CUST SERV
    - ◆ FIRE SFTY.
    - ◆ INSPECTION
    - ◆ LIFE SFTY.
    - ◆ PREVENTIVE
    - ◆ REGULATORY
    - ◆ RENOVATION
    - ◆ ROUTINE
  - Method (*Use List of Values, CTRL/L if needed*)
    - ◆ CONTRACT
    - ◆ IN HOUSE
  - Priority – Maintenance Work Orders
    - ◆ 1 W. O Emerg (0 days)
    - ◆ 2 W. O High (1 day)
    - ◆ 3 W. O Med (3 days)
    - ◆ 4 W. O Low (10 days)
- Lead Days (*Optional*)
  - Work (*Lead days necessary before PM is due, for work to be performed. CAMIS defaults to 0.*)
  - Schedule (*Lead days necessary before start date of PM, for Scheduling. CAMIS defaults to 1.*)

### **Labor**

- Access the Labor Window by clicking on the [LABOR] button from the PM Form
  - Primary Labor
    - Enter Crew (*Use List of Values, CTRL/L if needed*)

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- Enter Size
- Enter Craft = MAINT
- Enter Est Hours
- Secondary Labor, if applicable
  - Enter Crew (*Use List of Values, CTRL/L if needed*)
  - Enter Size
  - Enter Craft = MAINT
  - Enter Est Hours
  - Enter Task List
- Close the Labor Window by clicking on [OK] button

### **Tools**

- Access the Tools Window by clicking on the [TOOLS] button from the PM Form
  - Enter Tool number (*10 character free form field*)
  - Enter Description (*55 character free form field*)
  - Enter Qty
  - Enter U/M
- Close the Tools Window by clicking on the X in upper right hand corner

### **Billing**

- Access the Billing Window by clicking on the [BILLING] button from the PM Form
  - Select the Account Numbers to Charge (*Use the List of Values, CTRL/L*)
  - If Account Numbers are not available, new values can be entered. Please contact your local Business Coordinator
    - Account Number: Enter Account Number up to 8 characters, (*Use the List of Values, CTRL/L if needed*)
    - Subsidiary: Enter Subsidiary up to 2 characters, (*Use the List of Values, CTRL/L if needed*)
    - Object Code: Enter Object Code up to 3 characters, (*Use the List of Values, CTRL/L if needed*)
    - Activity Code (not mandatory): Enter Activity Code up to 4 characters, (*Use the List of Values, CTRL/L if needed*)
  - Select Markup Code (*Use List of Values, CTRL/L if needed*)
  - Select Billing Method
    - ACTUALS (*Account Numbers required*)
    - ESTIMATE (*Account Numbers required*)
    - NO CHARGE (*Account Numbers not required*)
- Close the Billing Window by clicking on [OK] button

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### **Task List**

- Access the Task List by clicking in the Task List block on the PM Form
  - ❑ Enter the necessary steps to perform the work
- Save the changes (*CTRL/U*)
- Close the PM Form by clicking on the X in upper right hand corner

### **Step 6: If PM exists, make a determination whether the scheduling is correct?**

- ❑ [YES] Define initial start date for PM
- ❑ [NO] Update PM scheduling criteria

### **Step 7: If necessary, update PM scheduling criteria**

- Access Equipment Form by clicking on the form in the Navigator. (*EQUIPMENT/EQUIPMENT*)
  - ❑ Enter Query Mode (*F11*)
    - Enter Equipment ID
  - ❑ Execute Query (*CTRL/F11*)
  - ❑ Cancel Query if no records are found. (*QUERY/CANCEL*)
- Access the PM window by clicking on the [PMs] tab from the Equipment Form
  - ❑ Select the PM Number to update

### **Criteria**

- Access the Criteria Window by clicking on the [CRITERIA] button from the PM Window, on the Equipment Form
- Determine if the PM will be performed on a Time Based, Completion or Fixed Date Based, Usage Based, Condition Based or Seasonal Based schedule.
- When you enter this Window, you are in the Scheduling function.

### **Schedule Tab**

#### **Time Based**

- ❑ Enter the Interval for standard and override, if necessary (*Daily, Weekly, Monthly, Yearly or None*)
- ❑ Enter the number for standard and override, if necessary (*frequency for the interval*)

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### **Completion or Fixed Date Based**

- ❑ Select date for PM to be Based On
  - Last completion date (*PM Work Order will not be generated unless previous PM Work Order is closed*)
  - Fixed Due Date (*PM Work Order will automatically be generated on a particular date*)

### **Usage Based**

- ❑ Enter Usage Units (*Miles, Hours, etc*)
- ❑ Enter Usage Number (*usage for the units*)

**or**

- ❑ Estimated Interval (*Daily, Weekly, Monthly, Yearly or None*)
- ❑ Enter Number (*frequency for the interval*)

### **Condition Based**

- Enter Condition Type (*Use the List of Values, CTRL/L if needed*)
- Enter Unit of Measure (*Use the List of Values, CTRL/L if needed*)
- Enter Priority (*Use the List of Values, CTRL/L if needed*)
- Enter Scheduling Criteria (*below or above*)

### **Seasonal Based**

- ❑ Enter Seasonal Start Date (*PM Work Order generation will begin*)
- ❑ Enter Seasonal End Date (*PM Work Order generation will end*)

### **Options Tab**

#### **Account**

- Access the Scheduling Options Window by clicking on the [OPTIONS] tab from the Scheduling Criteria Window
  - ❑ Select the Account Code source
    - Get From PM
    - Get From Equipment
  - ❑ Select the Account Numbers to Charge (*Use the List of Values, CTRL/L*)
  - ❑ If Account Numbers are not available, new values can be entered. Please contact your local Business Coordinator
    - Account Number: Enter Account Number up to 8 characters, (*Use the List of Values, CTRL/L if needed*)

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- Subsidiary: Enter Subsidiary up to 2 characters, (*Use the List of Values, CTRL/L if needed*)
- Object Code: Enter Object Code up to 3 characters, (*Use the List of Values, CTRL/L if needed*)
- Activity Code (not mandatory): Enter Activity Code up to 4 characters, (*Use the List of Values, CTRL/L if needed*)

### **Holidays**

- Select Holiday Calendar (*if needed*)

### **Valid Work Days**

- Select the days for scheduling PM work

### **Valid Weeks**

- Select the weeks for scheduling PM work
- Select the Partial or Full week definition

### **Override Tab**

- Access the Override Window by clicking on [OVERRIDE] tab from the Scheduling Criteria Window
  - Select Crew override option (*Standard or Override*)
  - Select Craft override option (*Standard or Override*)
  - Select Assigned To override option (*Standard or Override*)
  - Select Estimated Hours override option (*Standard or Override*)
  - Select Crew Size override option (*Standard or Override*)
  
- Select Secondary Labor checkbox option, if applicable, to include the following:
  - Crew
  - Craft
  - Estimated Hours
  - Crew Size
  - Task List

### **Task List Tab**

- Access the Task List Window by clicking on [TASK LIST] tab from the Scheduling Criteria Window
  - Enter Standard PM Task List, if applicable
  - Enter Additional Tasks, if applicable

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### **Step 8: Make a determination for performing the work**

- Access the PM Window by clicking on [PM] tab from the Equipment Form.
  - ❑ [YES] Enter the NEXT PM date (*to establish the initial PM being performed*)
  - ❑ [NO] Do not enter the NEXT PM date (*PM will be postponed until Next PM date has been entered*)

### **Step 9: Schedule Equipment PM Work Order**

- Access the Equipment PM Scheduling Form by clicking on the form in the Navigator. (*SCHEDULING/SCHEDULE EQUIPMENT PMs*)
  - ❑ Enter schedule week (*Use the < > to adjust the scheduled week*)
  - ❑ Enter Site
  - ❑ Enter Crew
  - ❑ Enter Priority (*optional*)
  - ❑ Click on the [SCHEDULE] button to schedule the PMs on the Schedule Equipment PM Form
- Close the Equipment PM scheduling form by clicking on the X in the upper right hand corner

### **Step 10: Postpone Equipment PM Work Order**

- Review the postponed equipment PMs
  - ❑ If Equipment PM is ready to be performed, Repeat Steps 8 & 9, otherwise do not enter the NEXT PM date

### **Step 11: Perform Work**

- Work is managed through the Managing Work Order Process.

## **E. Document Control**

Questions, suggestions, and corrections should be forwarded to [CamisHelpdesk.DCAM@State.ma.us](mailto:CamisHelpdesk.DCAM@State.ma.us).

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### F. Process Flow

