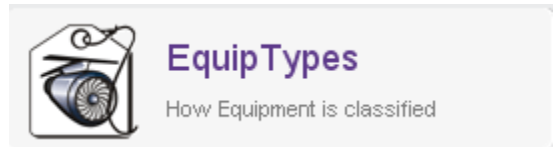


**STEP 1. Set up Equipment Types**


1. Make sure all Equipment Types are set up the way that you would like them.
2. This includes making sure that all Equipment Fields are filled in that are necessary in the Equipment Field tab.



**Note:** There is a preference for each Equipment Field to determine whether or not the value will print on Work Orders.

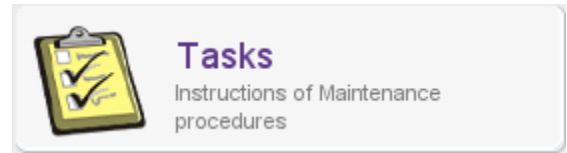
Equipment Field	Title	Show On Work Report
POWER		<input type="checkbox"/>
VOLTAGE		<input type="checkbox"/>

**STEP 2. Enter all Equipment records for the Equipment Type**

1. If the equipment you are entering is similar to another equipment record, you can use the Duplicate icon (  ) to quickly enter the values.
2. Enter a unique code for the new piece of Equipment that uniquely identifies the equipment record (don't forget to reference the building if applicable).
3. Enter/Update all appropriate fields (e.g. location information, serial number, etc.), including the fields in the Equipment Fields tab.
4. Click on the **Save** icon to save the equipment record.
5. Continue this process until all equipment is entered for the equipment type.

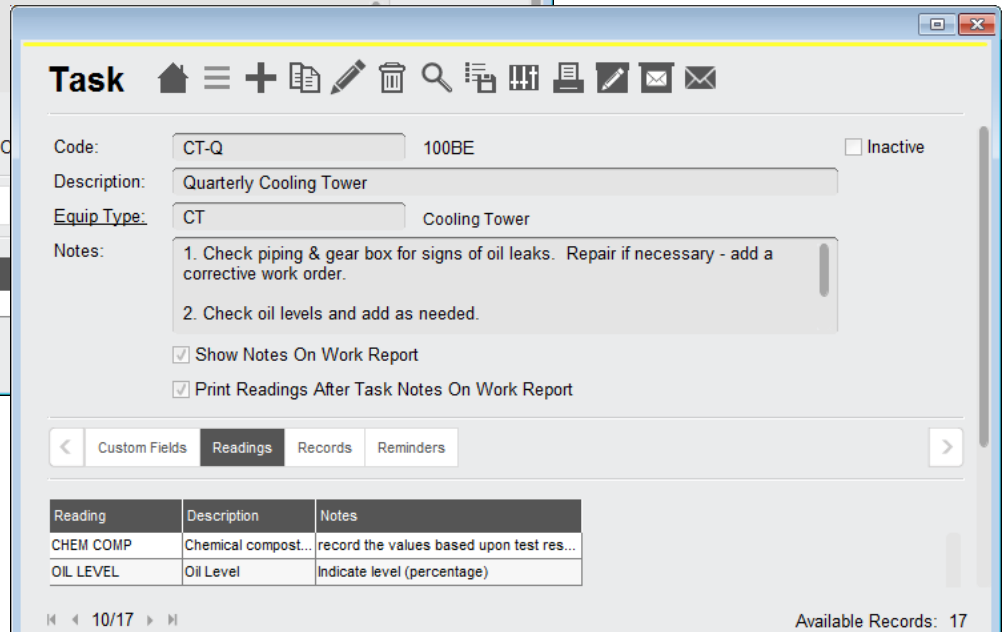
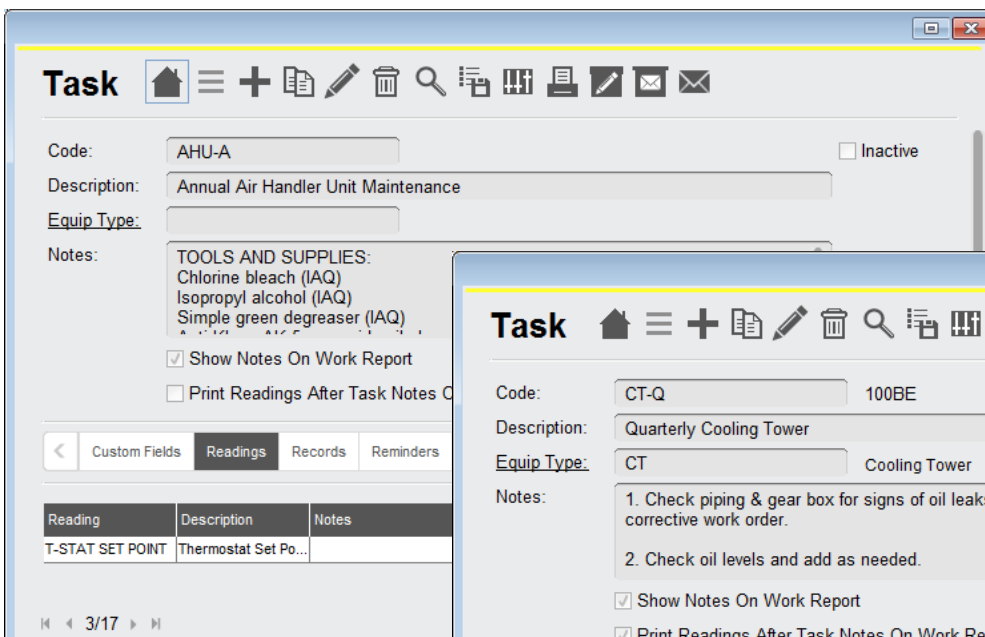
**STEP 3. Enter all Tasks for that Equipment Type**

1. Think of the Task capsule as a library of instructions. Each set of Tasks related to the Equipment Type need to be entered. These Task instructions will be visible on the PM Work Orders.

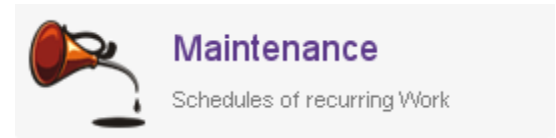


**Note:** If your company has entered standard tasks for you can modify the records as opposed to entering in brand new records.

2. When adding new records pay attention to the Code. We recommend making the code for the Task a combination of the Equipment Type and the Frequency of the Task. For example, if it is an annual task for an Air Handler (AHU), the code would be AHU-A.



#### STEP 4. Enter all Maintenance for one of the Equipment records



1. Open a blank list in the Maintenance capsule and click on the **+** icon to begin entering a new record. It is often helpful to start with the least frequent maintenance - i.e. Annual.
2. Following are some of the key fields to complete:

- **Code:** Recommended format: Equipment Code-Frequency (e.g. AHU-01-A).

*If you leave this blank the system will default it for you based on the Equipment Code and the Frequency you select.*

- **Equipment:** Select the equipment the maintenance is to be performed on.
- **Assigned To:** Set the combo box to the default Assigned To entity that will be performing the work (Worker, Vendor).
- **Description:** Enter a generic description for the Maintenance record (e.g. Annual PM Air Handling Unit). Avoid referencing the specific piece of equipment since you will be duplicating from this PM.
- **Commencement Date:** This is the date the maintenance should begin (the first date you want AwareManager to create a work order).
- **Source For Generating:** Select the date the system will calculate the next maintenance date off of.

*MOST COMMON: Last Scheduled*

- **Frequency:** How often this Maintenance should produce a work order per year.

*Remember this isn't always what you think – it is based on the other Maintenance records that you set up and what tasks are included in each record.*

- **Tasks:** List the tasks that need to be performed.
- **Materials:** Enter the Materials required for the Maintenance. If they do not already exist you can add them on the fly.
- **Defaults:** Enter all the defaults for the PM: **Work Type, Work Category, Status, Priority and Estimated Hours**

*Note: Estimated Hours should be the Total anticipated man hours.*

Example of a Maintenance Record:

## Maintenance

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📊
📄
✎
✉️
✉️

Code:	AHU-01-A2	100BE	Commencement Date:	September 7, 2011	<input type="checkbox"/> Inactive
Equipment:	AHU-01	Air Handler 1	Last Scheduled Date:	January 10, 2013	
Equip Type:	AHU	Air handler	Last Maintained Date:	July 6, 2012	
Contract:			Next Date:	January 10, 2013	
Worker:			Termination Date:	April 30, 2013	
Property:	100-N BEAC	100 Beacon Street Nor...	Source For Generating:	Last Maintained Date	
Unit:	100-N BEAC-03LR	3rd floor ladies room	Frequency:	1 Months	<input checked="" type="checkbox"/> Weekdays Only
Floor:	3		Stop Month/Day:	January 0	
Room:			Restart Month/Day:	July 0	
Contact:			Time To Schedule:	00:00	
Client:	ABC INC		Notes:	Notes to print on work orders	
Department:	ENG	Engineering			
Description:	Annual Air Handler Maintenance AHU-01				

Work

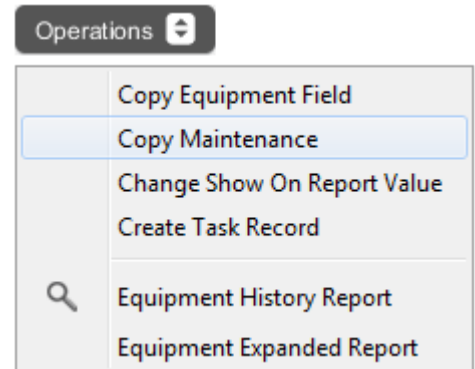
<
Custom Fields
Defaults
Other Links
Additional Amounts
Materials
Tasks
External
Reminders
>

Task	Notes
LOCKOUT	Perform Equipment Lock Out / Tag Out Procedures1. Notify all affected employees that a lockout is required and the reason therefor. 2. If the equipment is operatin
AHU-A	TOOLS AND SUPPLIES:Chlorine bleach (IAQ)Isopropyl alcohol (IAQ)Simple green degreaser (IAQ)Acti-Klean AK-5 non-acid coil cleaner (IAQ)Hand sprayer (IAQ)Hc
AHU-Q	TOOLS AND SUPPLIES:Engineer's tool pouchDwyer magnehelic manometerFilter media rollerSocket and nut driver setClean ragsPROCEDURE:1. FILTERS. Check co
AHU-S	TOOLS AND SUPPLIES:Grease gun with Mobile EP #1 greasePROCEDURE:1. GREASE MOTOR BEARINGS. Remove bottom grease plugs from motor bearing housin

⏪ < 2/26 > ⏩
Available Records: 26

**STEP 5. Use the Copy Maintenance operation from the Equipment List window to create the schedules for all of the other equipment records with the same maintenance.**

1. Do a search on all of the Equipment records with the same maintenance, making sure that the equipment you just created the maintenance records for is included in the list. If all this equipment is of the same type, do a search based on the Equipment Type.
2. Highlight the equipment record whose maintenance is set up.
3. Click on **Operations** (located at the top of the window) and select **Copy Maintenance**.
4. You will be warned that any maintenance already linked to the target equipment in the list will be deleted.
5. Press **OK** to proceed.
6. The new Maintenance records will automatically be created for all of the other pieces of Equipment in the list.



**STEP 6. Review / Update the new Maintenance records**

1. Open up the Maintenance records just created in the Maintenance list. It may be helpful to do a search by the Equipment Type.
2. Review and change (if necessary) any of the Maintenance records. You may want to change the Commencement Date(s) so that not all of the work orders will be created for the same date.