PM Schedules vs. PM Templates

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.
Creating a PM Template

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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](image)

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Creating a PM Template

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 Qtly 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 x 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.
Using a PM Template

- 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.