Team: PM Assignment

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The PM Assignment feature allows individuals with the role of "PM Assigner" to re-assign and or assign unassigned PM's to technicians.
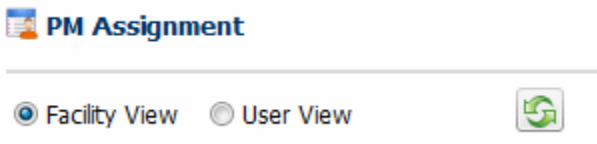
To access the PM Assignment feature, users will need to be in the home screen of Team (figure 1).
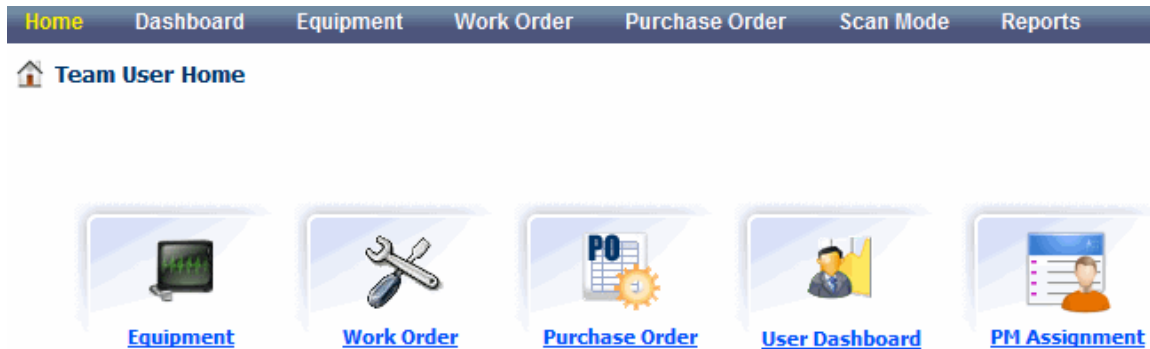
Figure 1

There are two different views a user can select when using the PM Assignment feature (figure 2):
1. Facility View
2. User View

Figure 2

Facility View

Under the facility view, users can narrow their search down to one specific facility when assigning PM's (figure 3).
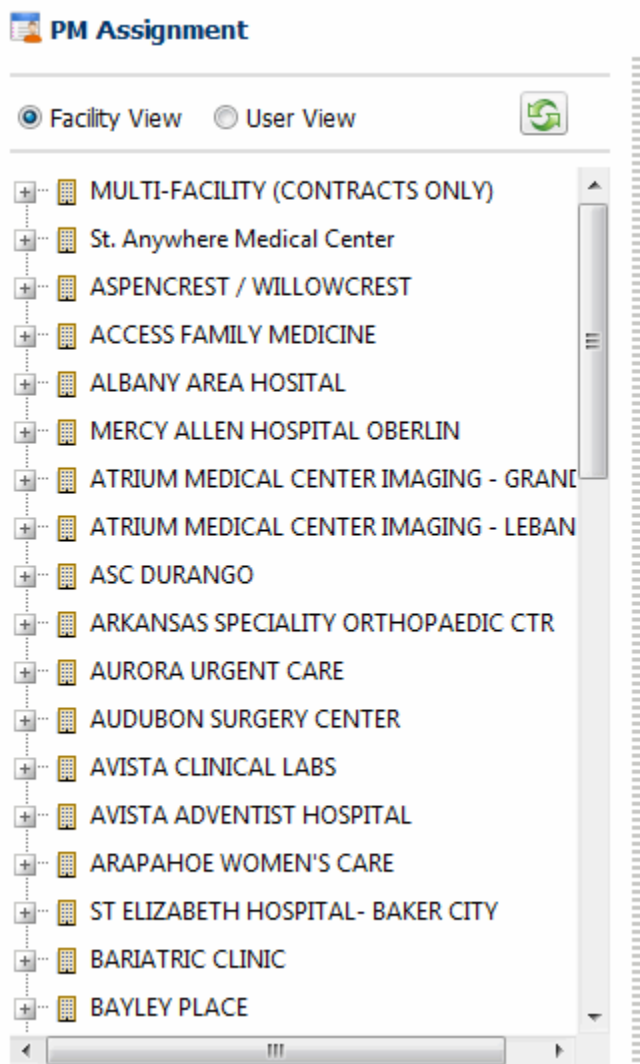

Figure 3

Once a facility is selected (figure 4), user can look to re-assign, assign, un-assign PM's to different technicians.
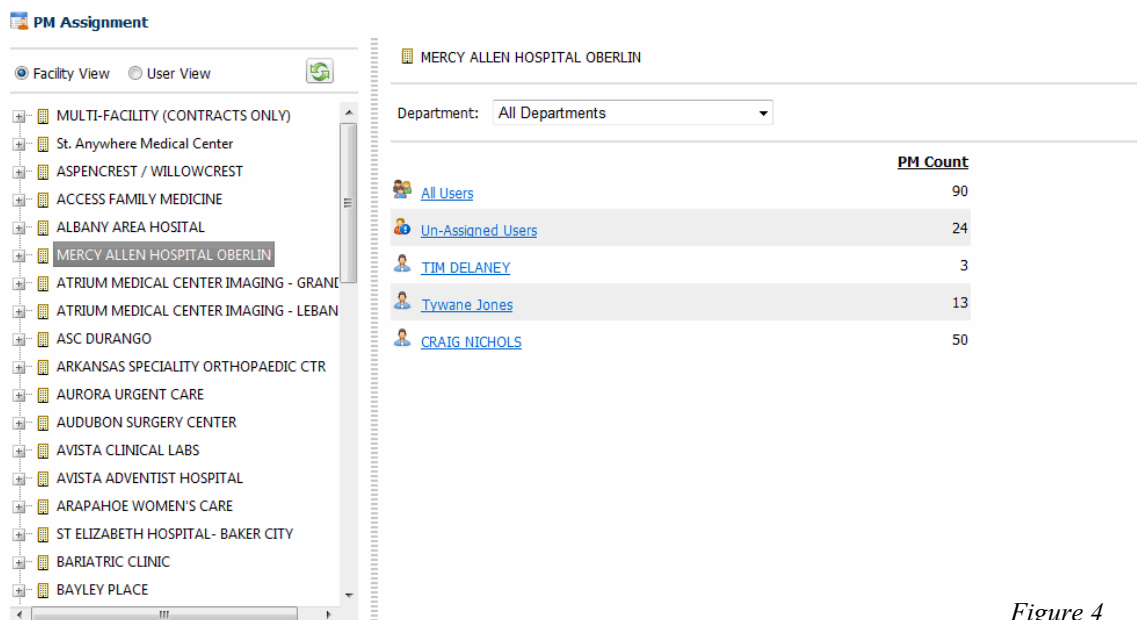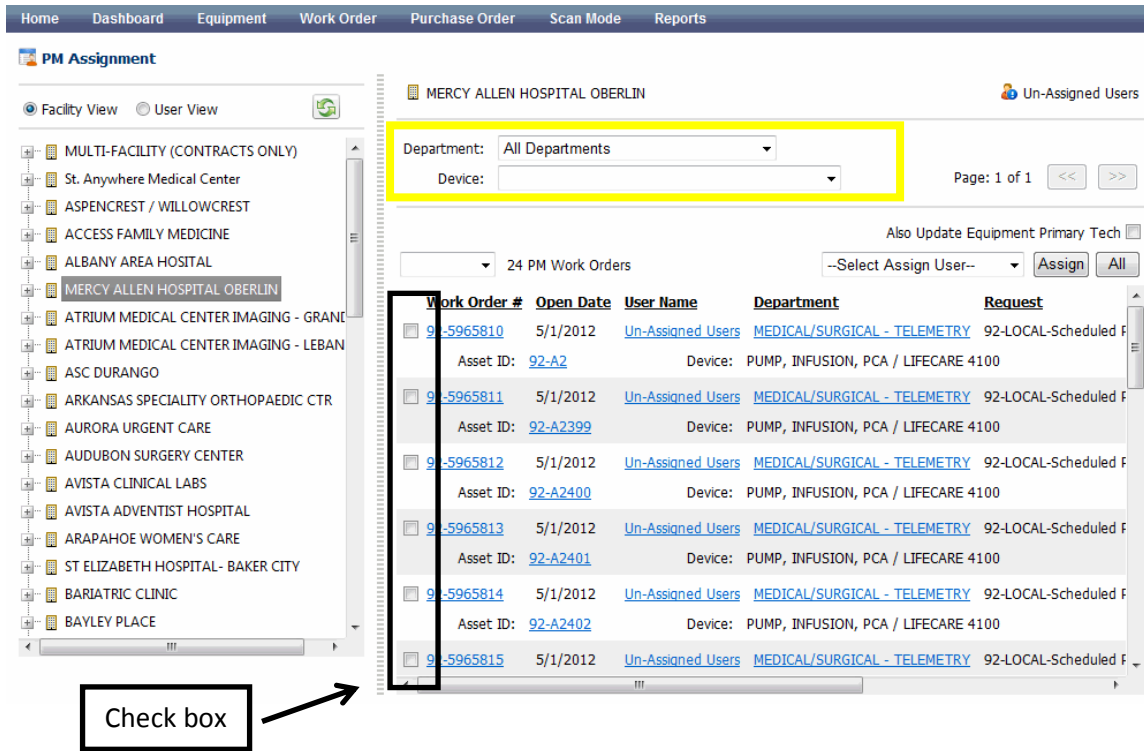

Figure 4

Users can select any of the users listed under a facility, including all users and un-assigned users (figure 4).

Once a user selects a specific user the system will take the user into the selection made (figure 5).

Check box

Figure 5

Users can narrow their options even more by selecting one or all of the following (figure 5, yellow):

- Department
- Device

Users can check all or select PM's individually from the list by clicking in the box to the left of the PM listed (figure 5).

Within the table of PM's users can also see the following information (figure 5):

- Work Order # - if a user clicked on the work order number that is underlined the system will take them into the work order screen.
- Open Date – when was the PM generated
- User Name – who is assigned the PM
- Department – which department the PM is assigned to
- Request - who requested the PM
- Facility – which facility the PM is located in

Some additional information within the selected user screen consists of (figure 5):

- Select Assign User – this is where the user will select who they want to assign the PM to
- Assign – this button used when prompting the system to assign the PM
- All – this button is used when the user is assign all the PM's to a technician

- Check box for "Also Update Equipment Primary Tech" – this is used when the user wants to assign a particular PM to a technician on a regular basis and not just the current month

The system will generate PM schedules based upon the specification set forth when the PM was created. When re-assigning PM's on a monthly basis they will resort back to the original technician that was assigned during the creation process unless the "Also Update Equipment Primary Tech" box is checked.
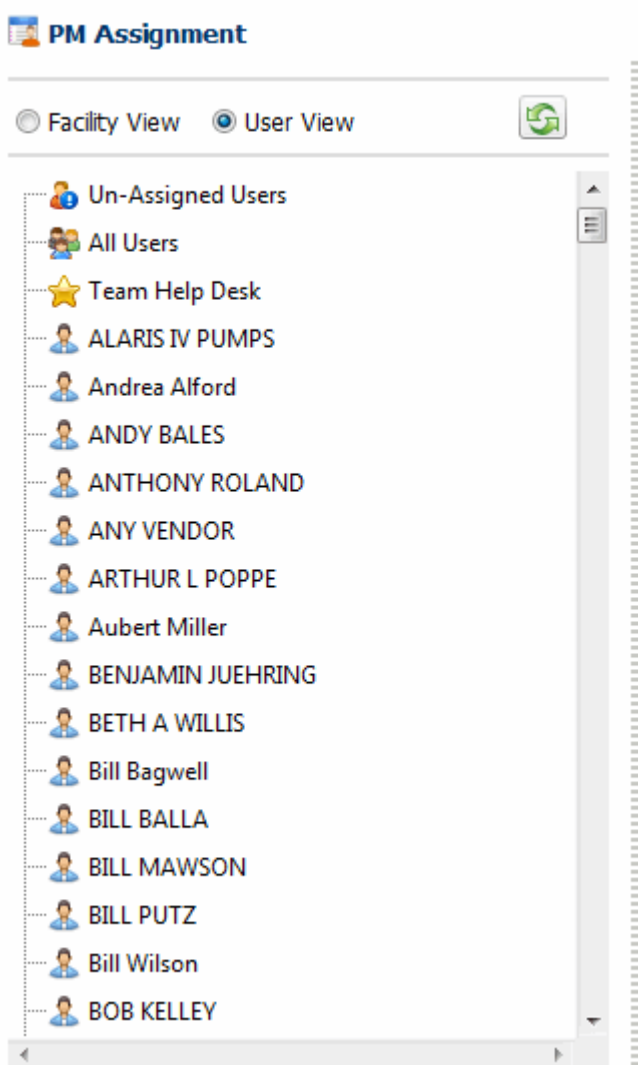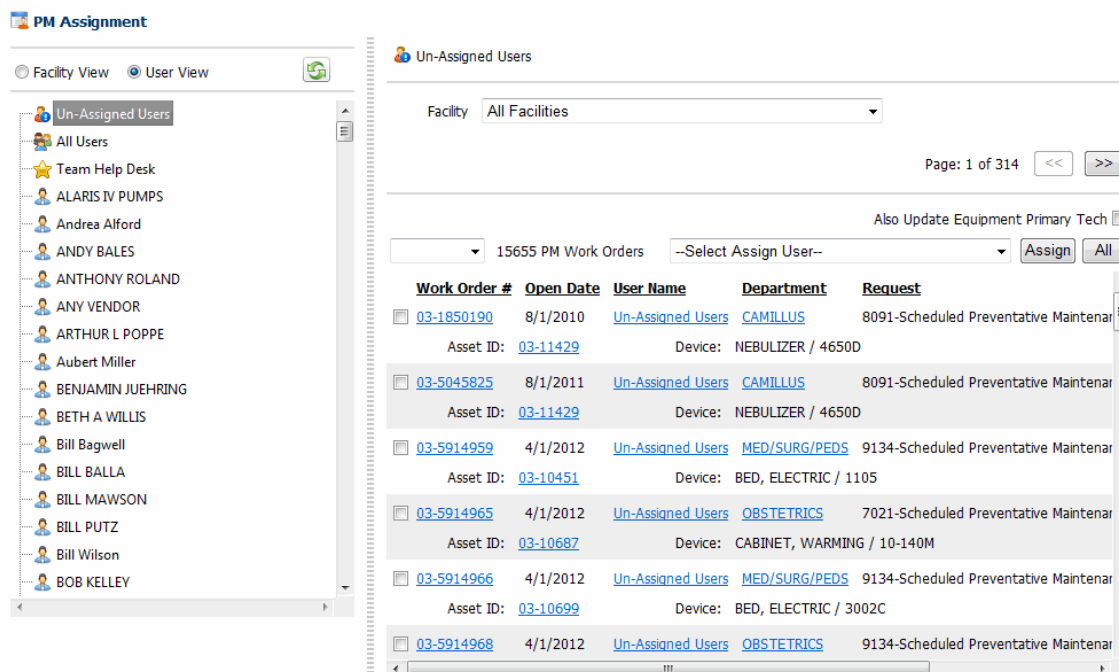
User View

Figure 6

Under the "User View," users can select un-assigned users, all users, or individuals listed within the "User View" box (figure 6).

Once a selection is made, users will be taken into the same screen as the facility view (figure 5 & 7).

Figure 7

There is no difference between the "Facility View" and the "User View," it's primarily used for individual preferences and how users choose to access the information.