

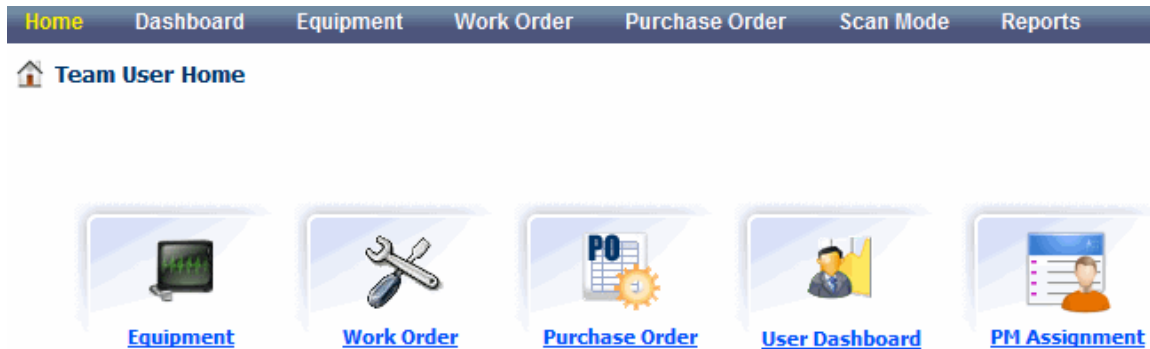
## **Team: PM Assignment**

### Table of Content

<i>Team: PM Assignment Introduction .....</i>	<i>2</i>
<i>Facility View .....</i>	<i>3</i>
<i>User View .....</i>	<i>6</i>

The PM Assignment feature allows individuals with the role of “PM Assigner” to re-assign and or assign unassigned PM’s to technicians.

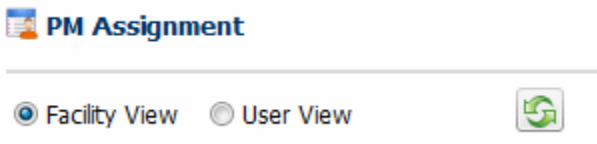
To access the PM Assignment feature, users will need to be in the home screen of Team (figure 1).



*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).

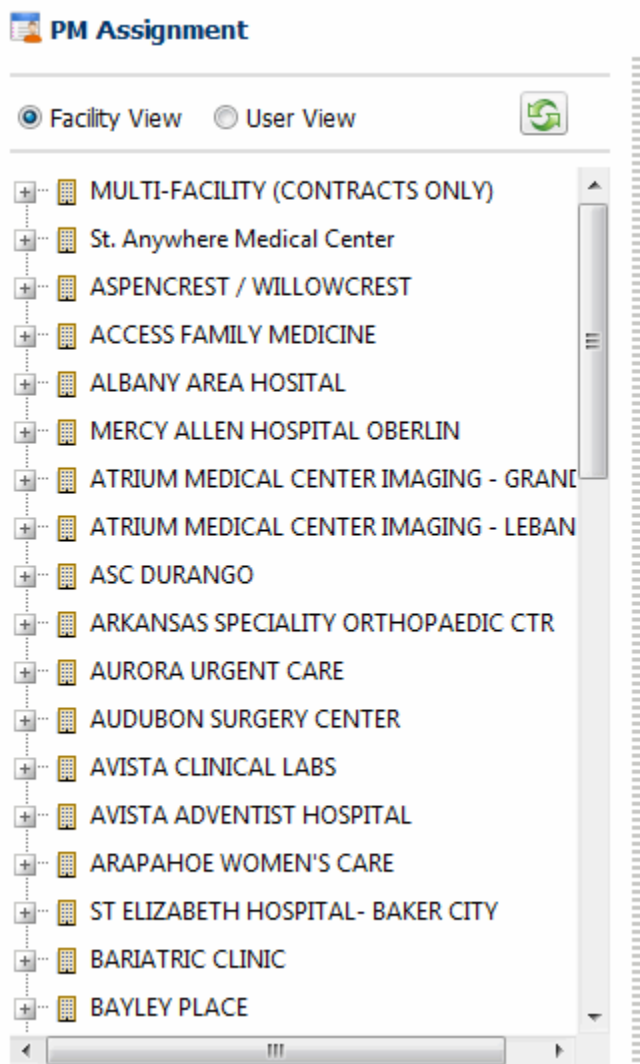


Figure 3

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

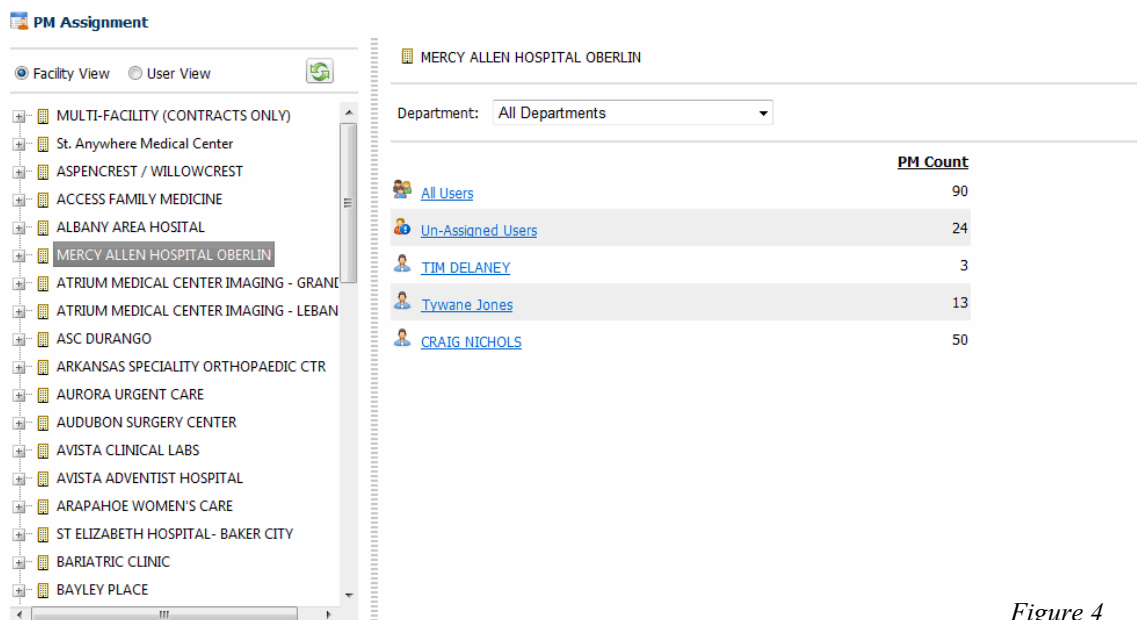
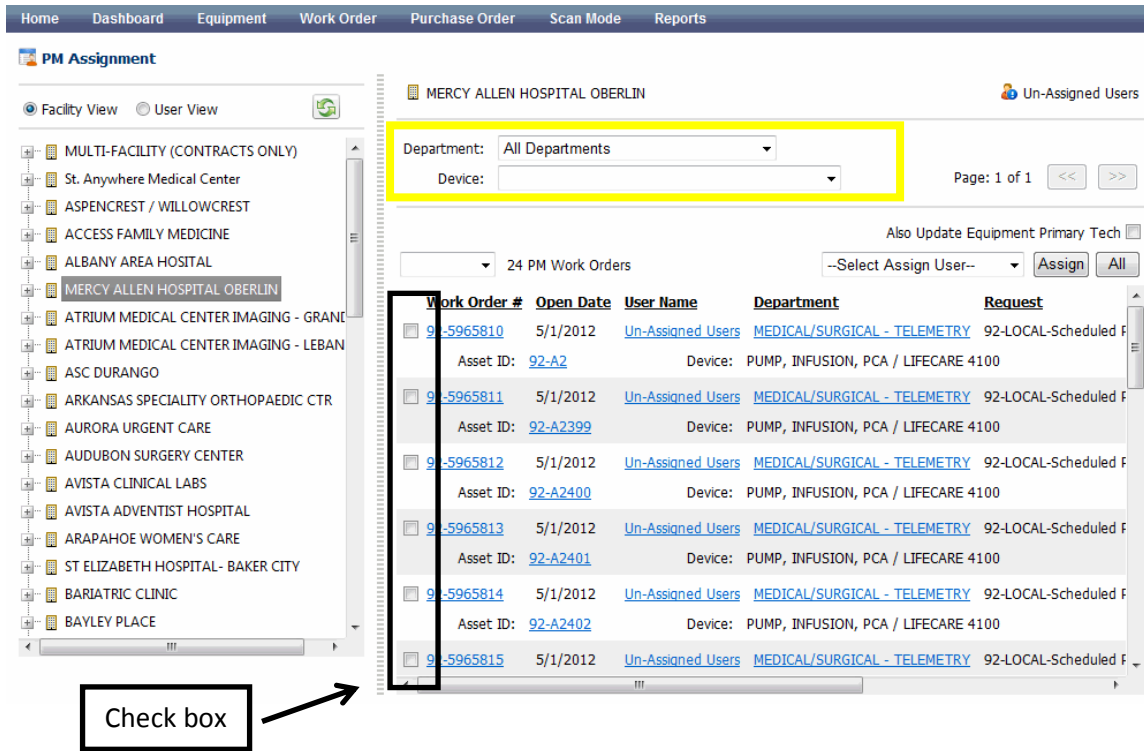


Figure 4

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).



Home Dashboard Equipment Work Order Purchase Order Scan Mode Reports

PM Assignment

Facility View User View

MERCY ALLEN HOSPITAL OBERLIN

Un-Assigned Users

Department: All Departments

Device:

Page: 1 of 1

Also Update Equipment Primary Tech

24 PM Work Orders

--Select Assign User-- Assign All

Work Order #	Open Date	User Name	Department	Request
<input type="checkbox"/> <a href="#">92-5965810</a>	5/1/2012	<a href="#">Un-Assigned Users</a>	<a href="#">MEDICAL/SURGICAL - TELEMETRY</a>	92-LOCAL-Scheduled F
Asset ID: <a href="#">92-A2</a> Device: PUMP, INFUSION, PCA / LIFECARE 4100				
<input type="checkbox"/> <a href="#">92-5965811</a>	5/1/2012	<a href="#">Un-Assigned Users</a>	<a href="#">MEDICAL/SURGICAL - TELEMETRY</a>	92-LOCAL-Scheduled F
Asset ID: <a href="#">92-A2399</a> Device: PUMP, INFUSION, PCA / LIFECARE 4100				
<input type="checkbox"/> <a href="#">92-5965812</a>	5/1/2012	<a href="#">Un-Assigned Users</a>	<a href="#">MEDICAL/SURGICAL - TELEMETRY</a>	92-LOCAL-Scheduled F
Asset ID: <a href="#">92-A2400</a> Device: PUMP, INFUSION, PCA / LIFECARE 4100				
<input type="checkbox"/> <a href="#">92-5965813</a>	5/1/2012	<a href="#">Un-Assigned Users</a>	<a href="#">MEDICAL/SURGICAL - TELEMETRY</a>	92-LOCAL-Scheduled F
Asset ID: <a href="#">92-A2401</a> Device: PUMP, INFUSION, PCA / LIFECARE 4100				
<input type="checkbox"/> <a href="#">92-5965814</a>	5/1/2012	<a href="#">Un-Assigned Users</a>	<a href="#">MEDICAL/SURGICAL - TELEMETRY</a>	92-LOCAL-Scheduled F
Asset ID: <a href="#">92-A2402</a> Device: PUMP, INFUSION, PCA / LIFECARE 4100				
<input type="checkbox"/> <a href="#">92-5965815</a>	5/1/2012	<a href="#">Un-Assigned Users</a>	<a href="#">MEDICAL/SURGICAL - TELEMETRY</a>	92-LOCAL-Scheduled F

Check box

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

Figure 5

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

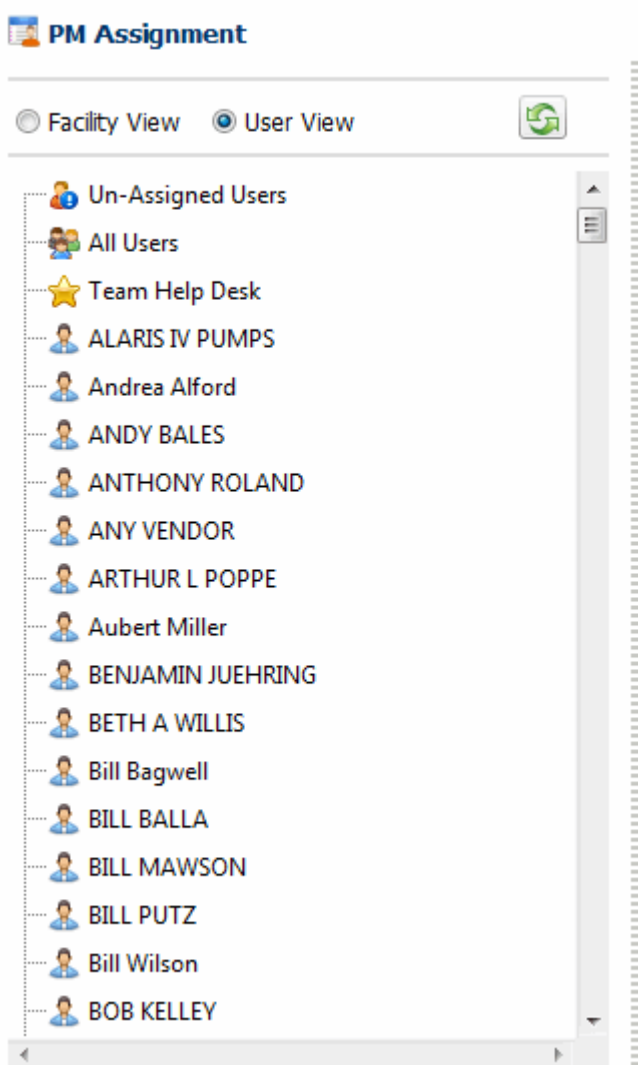
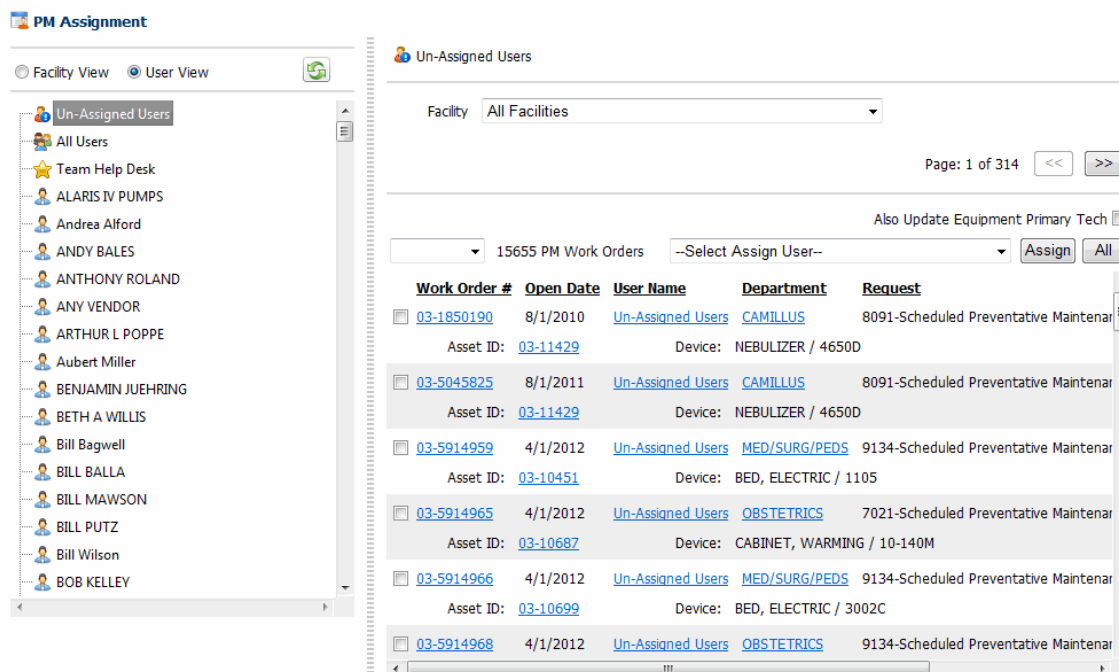


Figure 6

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).



The screenshot displays the 'PM Assignment' software interface. On the left, a sidebar shows a list of users under the 'Un-Assigned Users' category, including names like Andrea Alford, ANDY BALES, ANTHONY ROLAND, and others. The main area is titled 'Un-Assigned Users' and features a 'Facility' dropdown menu set to 'All Facilities'. Below this, there's a section for '15655 PM Work Orders' with a '--Select Assign User--' dropdown and 'Assign' and 'All' buttons. A table lists work orders with columns for Work Order #, Open Date, User Name, Department, and Request. The table shows several entries, all with 'Un-Assigned Users' as the user and various departments like CAMILLUS, MED/SURG/PEDS, and OBSTETRICS.

Work Order #	Open Date	User Name	Department	Request
03-1850190	8/1/2010	Un-Assigned Users	CAMILLUS	8091-Scheduled Preventative Maintenance
03-5045825	8/1/2011	Un-Assigned Users	CAMILLUS	8091-Scheduled Preventative Maintenance
03-5914959	4/1/2012	Un-Assigned Users	MED/SURG/PEDS	9134-Scheduled Preventative Maintenance
03-5914965	4/1/2012	Un-Assigned Users	OBSTETRICS	7021-Scheduled Preventative Maintenance
03-5914966	4/1/2012	Un-Assigned Users	MED/SURG/PEDS	9134-Scheduled Preventative Maintenance
03-5914968	4/1/2012	Un-Assigned Users	OBSTETRICS	9134-Scheduled Preventative Maintenance

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.