**(Your Organization) FMX Administrator Planned Maintenance Guide**

Login to FMX

Step 1: Open an internet browser and navigate to (yourcompany.gofmx.com)

**Step 2:** Log in with the following credentials:

* Email
* Password

Create an Instruction Set

**Step 1:** Select **Planned Maintenance** in the left sidebar, then click on the **Instruction Sets** tab.

**Step 2:** Click on the **+New instruction set** button.

**Step 3:** Enter the **instruction set name** - this will be the name for the step-by-step checklist (e.g., HVAC Monthly PM, Check Belt Tension)

**Step 4:** Enter the **description** (optional) - this is where you can describe what the instruction set will be used for.

**Step 5:** Add **custom fields** if you would like the resolving user to capture additional information when completing the task (ex. Temperature).

**Step 6:** Add any additional attachments corresponding with the planned maintenance instructions

**Step 7:** Enter your list of steps for the planned maintenance.



**Step 8:** Select **Save** to add the instruction set.

Create a Planned Maintenance Task

**Step 1:** On the calendar page, click **New Request** on the top right side of the page, then select **Planned Maintenance Task.**

**Step 2:** Enter the name of the task (e.g. AHU #1 Quarterly PM, Check Belt Tension – Monthly).

**Step 3:** Enter the **date** of first time the task will occur.

**Step 4:** Enter the **frequency** of the task occurrence (Daily, Weekly, Monthly, Yearly), then select how often you want it to occur. If the task should not occur during part of the year, enter the date range in the Exclusion date section (e.g. landscaping tasks that will not occur during the winter months). Finally, select whether you want the **next due date** to be fixed based on the due date or vary based on the last execution date.

**Step 5:** Add any additional attachments you need for the task.

**Step 6:** Enter the name of the **Instruction Set** that you created in the Instruction Sets. If no instruction set is required for the task then leave this blank.

**Step 7:** This is the **building** where the task will take place.

**Step 8:** Enter **equipment**. Leave blank if the task is not associated with equipment. If you want to associate the task with equipment, this is where you would add the Equipment Tag (e.g., AHU # 1, Exhaust Fan 12, Fire Extinguisher).

**Step 9:** Select the name of the person you wish to **assign** to this task.

**Step 10:** Check the box is the task if outsourced.

**Step 11:** Set up optional email reminders if you would like reminders to be sent before the task is due or after it has become overdue.

**Step 12:** Click **Save** to add the planned maintenance task to your FMX calendar.



Respond to a Planned Maintenance Task

**Step 1:** Find the task you wish to respond to (on the calendar or in the planned maintenance grid accessed via the left sidebar), and click **Respond**.

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**Step 2:** Type response and click **Respond**.



Execute a Planned Maintenance Task

**Step 1:** Find the task you wish to execute (on the calendar or in the planned maintenance grid accessed via the left sidebar) then click **Execute**.

**Step 2:** Check off all steps of the instruction set (if there is one), enter a resolution, hours, cost, inventory and attach additional information if necessary.

**Step 3:** Click **Execute** to close out the task, or **Save** to complete the task later.



Reopen a Planned Maintenance Task

**Step 1:** Find the executed task you wish to reopen (on the calendar or in the planned maintenance grid accessed via the left sidebar) then click **Reopen**.

**Step 2:** Next, enter a reason for reopening the task and click **Save**.



**Filter in Calendar View**

**Step 1:** Click the Filter button above the calendar view and select the filter you would like:



**NOTE:** You may choose more than one filter at a time

**Remove Filters**

If you're having trouble locating certain requests, events, or other information on your FMX calendar or in your FMX grids it could be because you have a filter selected that is hiding the information you're looking for.

You can see the filters that have been applied by looking underneath the Filter and Search bar:



**Remove All Filters**

To quickly remove all of the filters that are currently selected, click on the "x" attached to the filter button:

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Another way to remove filters is to click on the "Filter" button and choose "Clear Filter" at the bottom of the page:

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**Remove a Single Filter**

To remove filters one at a time, click on the "x" button next to the filter(s) you would like to remove:

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**Save Filters**

To save your current filters for future use, click the button at the bottom that says "Save Filter":

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Then type in the name of this saved filter. Once done, click the checkmark to save:

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