

How to create a preventive maintenance record in IBM Maximo

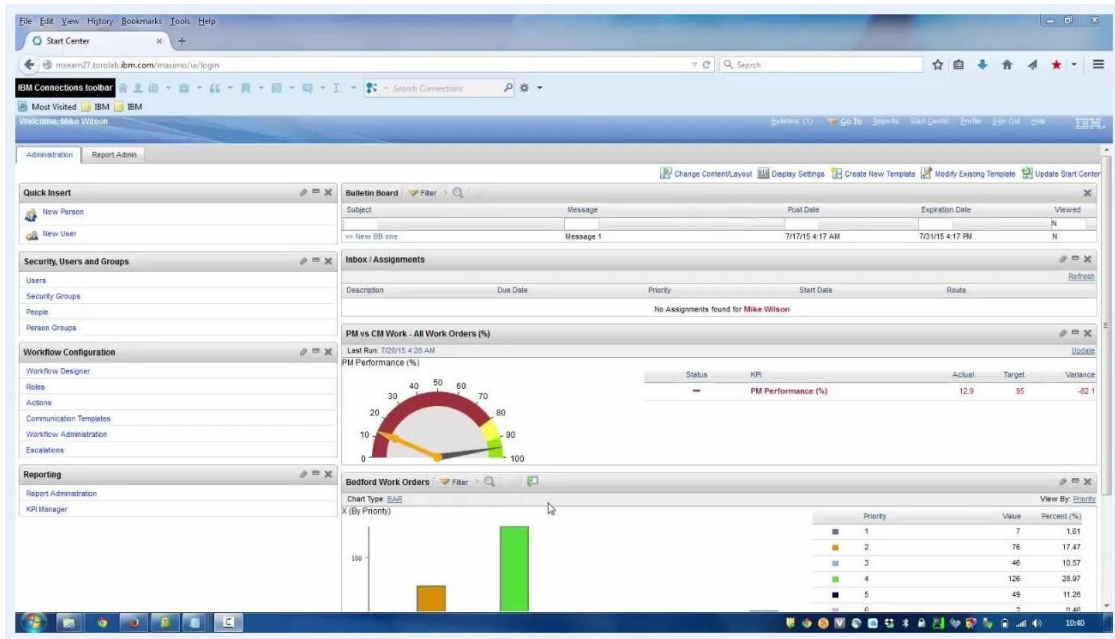
This guide shows you how to create a preventive maintenance record in IBM Maximo 7.5, modify its scheduling details, and link it to a Master PM. You will also learn how changes made at the Master PM level cascade to associated PM records, and how to prevent specific PMs from receiving those updates.

Prerequisites

- A valid Maximo 7.5 login and user credentials.
- Access rights to the Preventive Maintenance and Master PM applications.
- An existing PM record or Master PM record to work with (as shown in the examples below).

Step 1: Access the Maximo Start Center

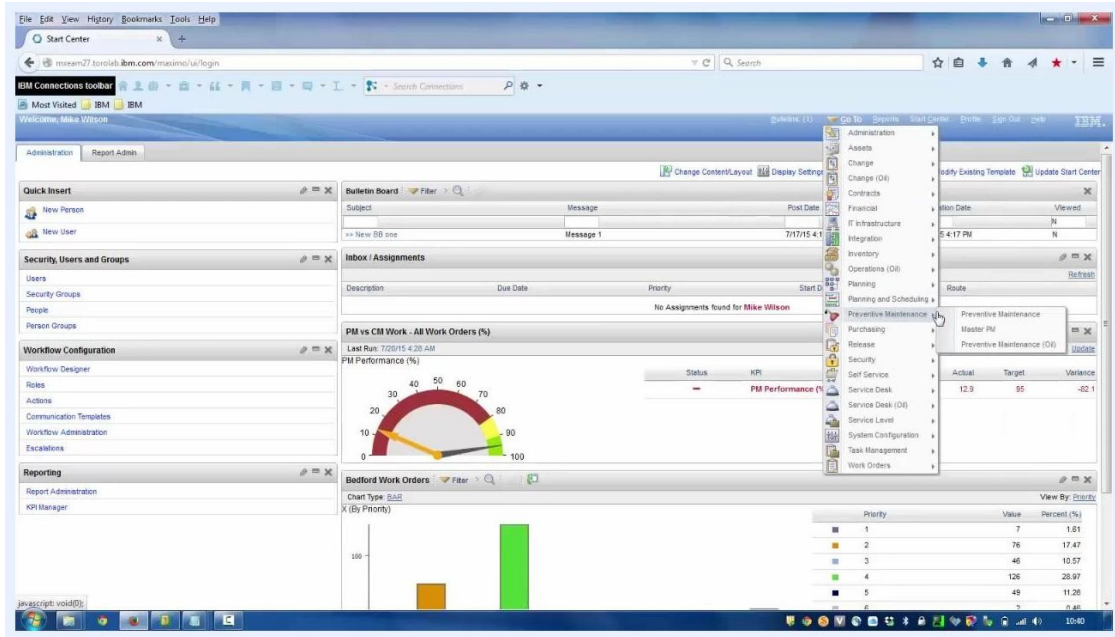
Open your web browser and navigate to your Maximo 7.5 login page, then log in with your credentials. The Start Center dashboard appears, displaying widgets such as **Quick Insert**, **Bulletin Board**, **Inbox/Assignments**, **PM vs CM Work Orders**, and **Bedford Work Orders**.



Maximo Start Center dashboard showing widgets for Quick Insert, Bulletin Board, Inbox/Assignments, PM vs CM Work Orders, and Bedford Work Orders, with a user logged in.

Step 2: Navigate to the Preventive Maintenance application

Locate the top navigation bar and hover over or click the **Go To** menu. In the dropdown, hover over **Preventive Maintenance**, then select **Preventive Maintenance** from the submenu to open the PM records application.



Expanded Go To menu showing the Preventive Maintenance and Master PM options.

Step 3: View preventive maintenance records

The Preventive Maintenance application displays a list of existing PM records, with columns for PM number, Description, Location, Asset, Priority, Forecast Exists, and Site. You can filter or search for specific PMs using the fields at the top of each column. Example records include:

- **IC-11200:** HVAC Quarterly Inspections & Certification
- **IC-12100:** Forklift #1 Quarterly Inspection and Certification

- **IC-12210: Crane Quarterly Inspection and Certification**

PM #	Description	Location	Asset	Priority	Forecast Exists?	Site
IC-11200	HVAC Quarterly Inspections & Certification		11200	9	☐	BEDFORD
IC-11300	Compressor Quarterly Inspection and Certification		11300	9	☐	BEDFORD
IC-11400	Burner Quarterly Inspection and Certification		11400	9	☐	BEDFORD
IC-12100	Forklift #1 Quarterly Inspection and Certification		12100	7	☐	BEDFORD
IC-12210	Crane Quarterly Inspection and Certification		12210	7	☐	BEDFORD
IC-12400	Forklift #2 Quarterly Inspection and Certification		12400	7	☐	BEDFORD
IC-13110	Feeder System Inspection and Certification		13110	9	☐	BEDFORD
IC-13120	Bottom Sealing System Inspection and Certification		13120	9	☐	BEDFORD
IC-13141	PKG Dept. Elevator Inspections & Certification		13141	9	☐	BEDFORD
IC-13150	Tap Breaker Quarterly Inspection and Certification		13150	9	☐	BEDFORD
IC-13160	Filter/Lifter System Inspection and Certification		13160	9	☐	BEDFORD
IC-67671	Fire Extinguisher Inspection and Certificate	NEEDHAM		0	☐	BEDFORD

Preventive Maintenance application showing a list of PM records with columns for PM, Description, Location, Asset, Priority, Forecast Exists, and Site.

Step 4: Modify a preventive maintenance record

Select a PM record to view its details, for example **IC-12100: Forklift #1 Quarterly Inspection and Certification**. The details screen shows multiple tabs, including **List**, **PM**, **Frequency**, **Seasonal Dates**, **Job Plan Sequence**, **PM Hierarchy**, and **Forecast**.

In the **Frequency** tab, you can modify the frequency value. For example, set **Frequency = 90** and **Frequency Units = DAYS**. In the **Job Plan Sequence** tab, make sure at least one job plan record is entered.

The screenshot shows the IBM Connections Preventive Maintenance (PM) record form, specifically the **Frequency** tab. The form is titled "Preventive Maintenance" and includes a search bar and navigation tabs: List, PM, Frequency (selected), Seasonal Dates, Job Plan Sequence, PM Hierarchy, and Forecast.

Frequency Tab Details:

- PM ID:** IC-12100
- Location:** Forklift #1
- Asset:** 12100
- Route:**
- Frequency:** 90
- Frequency Units:** DAYS
- Site:** BEDFORD
- Status:** DRAFT
- Override Updates from Master PM?** ☐
- Forecast Dates Locked?** ☐
- Forecast Expiry?** ☐
- Lead Time (Days):**
- Lead Time Active?** ☐
- Include this PM in the Forecast?** ☒
- Counter:** 1
- Use Job Plan Sequences?** ☐
- Has Children?** ☐

Work Order Information:

- Job Plan:** NS12100
- Work Type:** PM
- Work Order Status:** WSCH
- Priority:** 7
- Interruptible?** ☐
- Require Asset Downtime?** ☐
- Description:** Electric Cart Forklift Inspection
- Last Start Date:** 3/30/99
- Last Completion Date:** 11/13/96
- Earliest Next Due Date:** 7/21/15
- Start Constraint Offset:**
- Finish Constraint Offset:**

Responsibility:

- Supervisor:** MILLER
- Crew:**
- Lead:**
- Work Group:**
- Owner:**
- Owner Group:**
- Crew Work Group:**

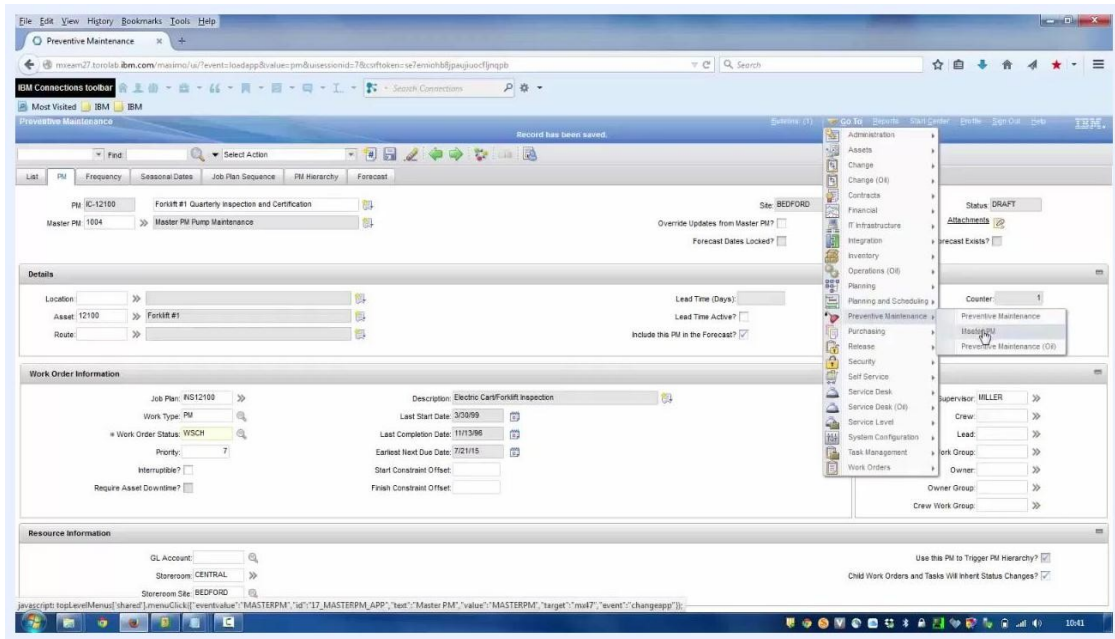
Resource Information:

- GL Account:**
- Stations:** CENTRAL
- Stations Site:** BEDFORD
- Use this PM to Trigger PM Hierarchy?** ☒
- Child Work Orders and Tasks Will Inherit Status Changes?** ☒

Frequency tab of a PM record showing Frequency = 90, Frequency Units = DAYS, and other work order generation information.

Step 5: Associate the PM with a Master PM

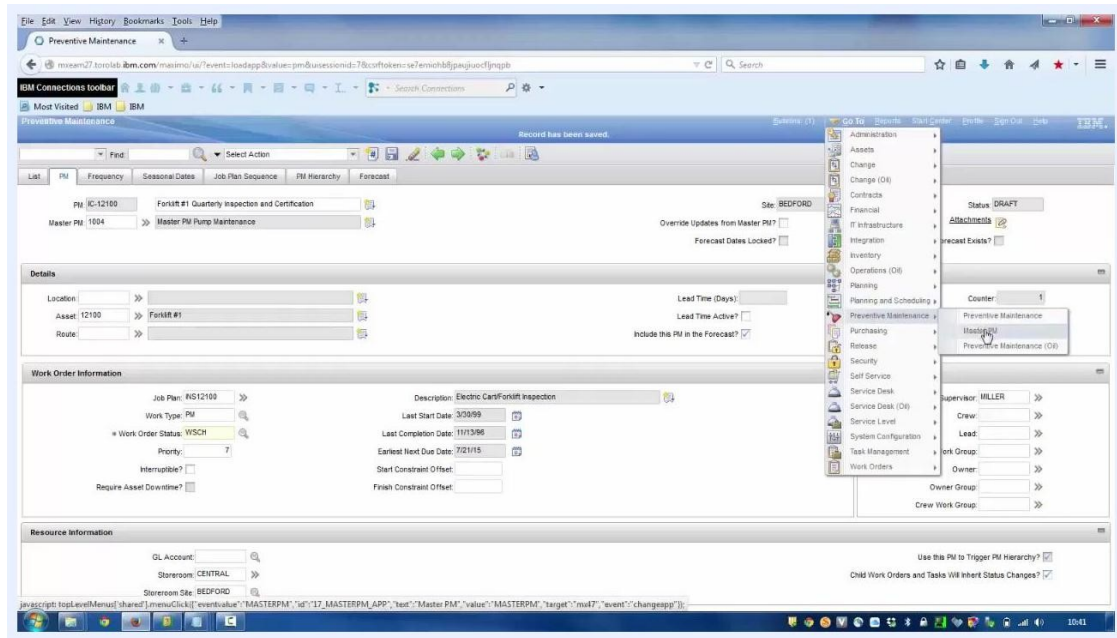
In the PM details screen, locate the **Master PM** field. Enter the Master PM number (for example, **1004**) or use the lookup to select the appropriate master PM, such as "Master PM Pump Maintenance." Click the save icon or button to save the association.



PM details screen with the Master PM field filled in as 1004, and the record saved.

Step 6: Access the Master PM record

Return to the **Go To** menu, hover over **Preventive Maintenance**, and select **Master PM** from the submenu. This opens the Master PM application, where you can view and manage master PM records.



Expanded Go To menu with the cursor selecting Master PM under Preventive Maintenance.

By completing these steps, you can view, modify, and associate preventive maintenance records with master PMs in Maximo 7.5. The remaining steps cover how changes cascade from a Master PM to its associated PMs, and how to control that propagation.

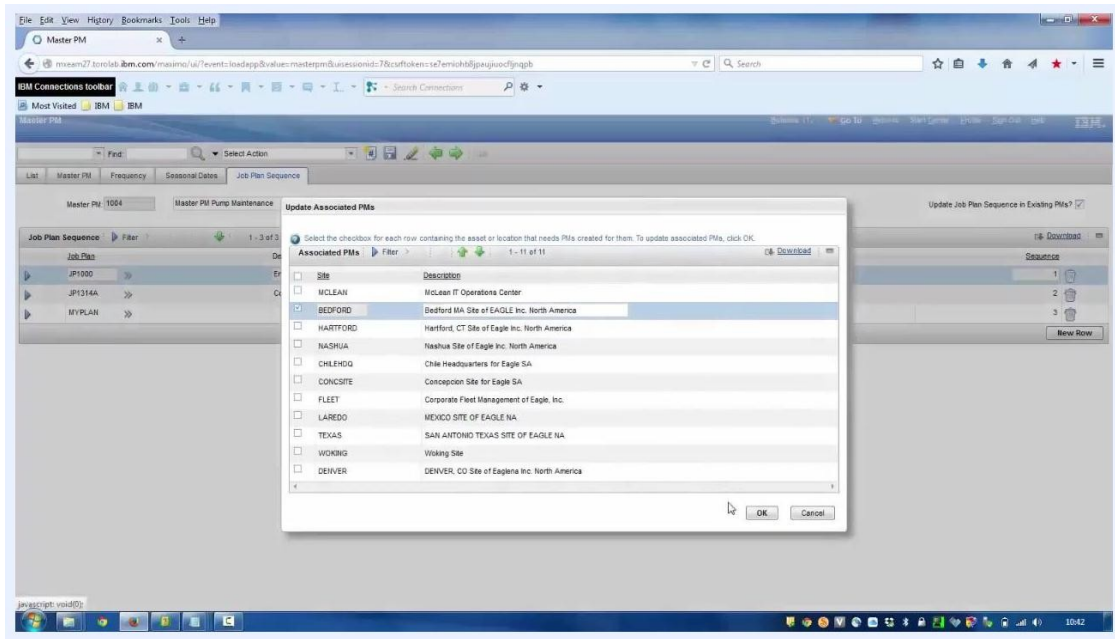
Step 7: Cascade updates from a Master PM to associated PMs

Open the Master PM record you want to update, for example Master PM **1004**, "Master PM Pump Maintenance." In the **Frequency** tab, set a new frequency value, such as **Frequency = 110** and **Frequency Units = DAYS**.

Switch to the **Job Plan Sequence** tab and add or update job plans as needed. For example, add three job plans:

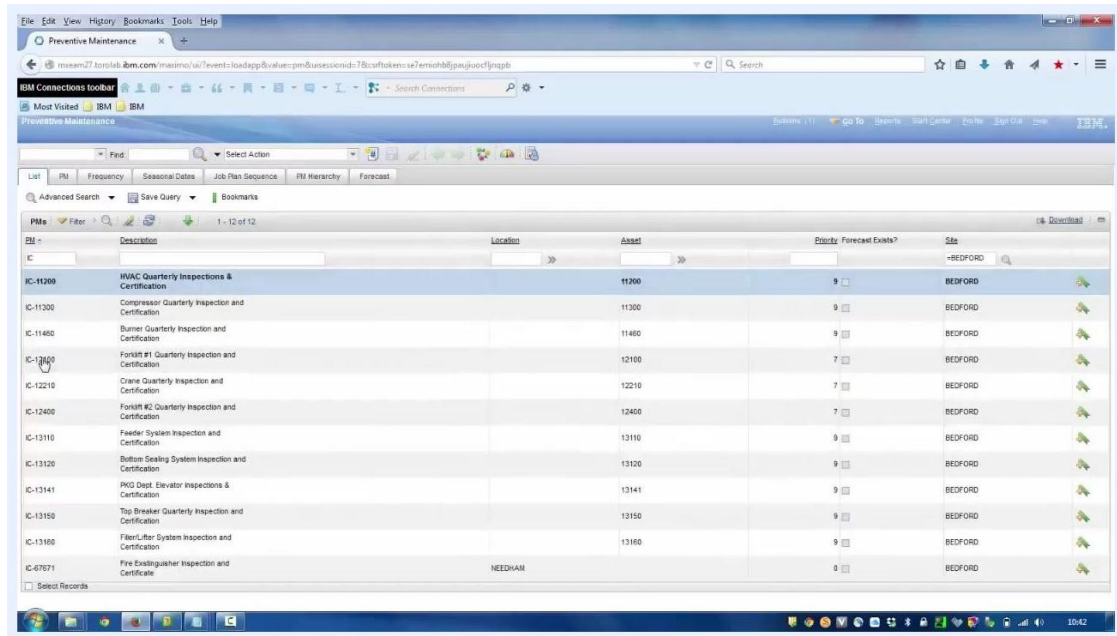
- **JP1000**: Emergency Pipe Repair (Sequence 1)
- **JP1314A**: Conveyor Belt 3 Month Service (Sequence 2)

- **MYPLAN (Sequence 3)**



Master PM Job Plan Sequence tab showing three job plans — JP1000, JP1314A, and MYPLAN — with their descriptions and sequence numbers.

Click the option to update associated PMs. A dialog appears listing all sites where PMs are associated. Select the relevant site or sites, for example **BEDFORD**, by checking the corresponding checkbox, then click **OK** to confirm the update. Save the Master PM record to apply the changes.



Update Associated PMs dialog with a list of sites, BEDFORD selected, and the OK and Cancel buttons visible.

Step 8: Verify the cascade effect on preventive maintenance records

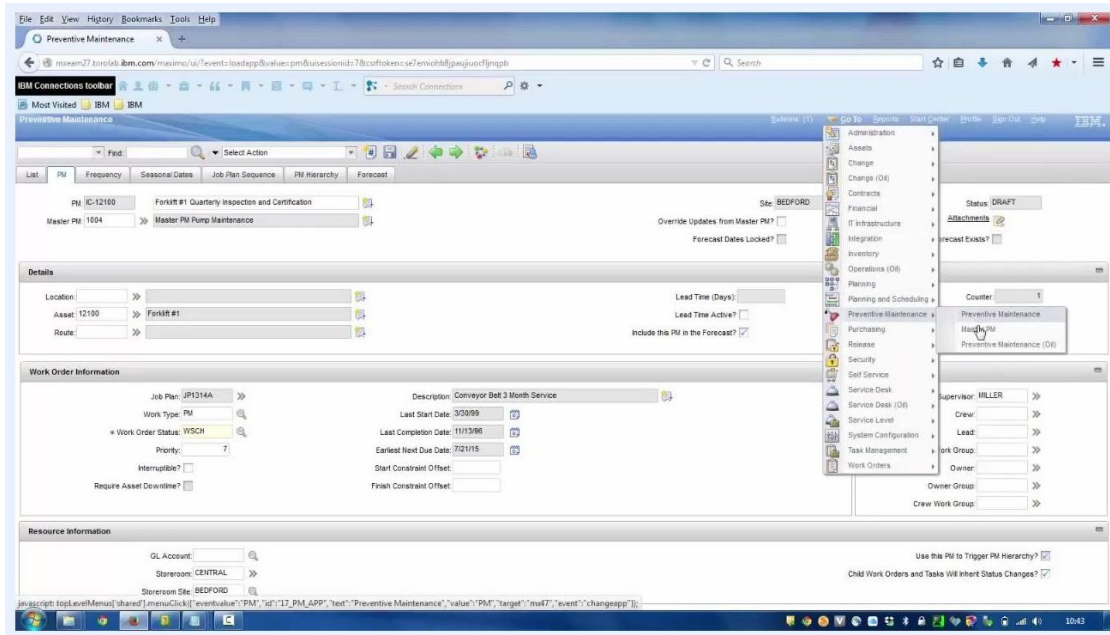
Return to the **Preventive Maintenance** application and open the associated PM record, for example **IC-12100: Forklift #1 Quarterly Inspection and Certification**. In the **Frequency** tab, verify that the frequency has been updated to **110** (previously 90).

The screenshot displays the 'Preventive Maintenance' application interface. The 'Frequency' tab is selected, showing the following details:

- PM ID:** IC-12100
- Asset:** Forklift #1
- Frequency:** 110
- Master PM:** 1004
- Job Plan:** JP1314A
- Description:** Conveyor Belt 3 Month Service
- Work Type:** PM
- Work Order Status:** WSCN
- Priority:** 7
- Interruption:** ☐
- Require Asset Downtime:** ☐
- Location:** [Empty]
- Asset:** 12100
- Route:** [Empty]
- Lead Time (Days):** [Empty]
- Lead Time Active:** ☐
- Include this PM in the Forecast:** ☒
- Counter:** 1
- Use Job Plan Sequences:** ☐
- Has Children:** ☐
- Supervisor:** MILLER
- Crew:** [Empty]
- Lead:** [Empty]
- Work Group:** [Empty]
- Owner:** [Empty]
- Owner Group:** [Empty]
- Crew Work Group:** [Empty]
- GL Account:** [Empty]
- Stations:** CENTRAL
- Stations Site:** BEDFORD
- Use this PM to Trigger PM Hierarchy:** ☐
- Child Work Orders and Tasks Will Inherit Status Changes:** ☒

Preventive Maintenance record for IC-12100, Frequency tab showing Frequency = 110, Frequency Units = DAYS, and Master PM = 1004.

Switch to the **Job Plan Sequence** tab and confirm that all three job plans from the Master PM are now present: JP1000, JP1314A, and MYPLAN, in their respective sequence order.



Preventive Maintenance record Job Plan Sequence tab showing three job plans matching the Master PM.

Step 9: Understand which Master PM fields cascade

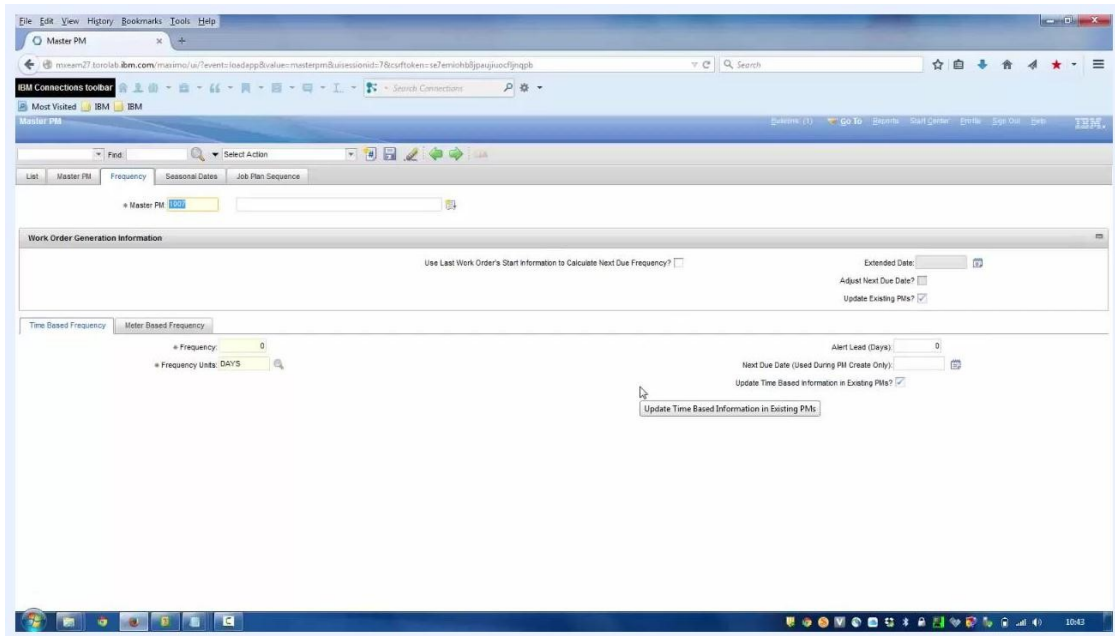
In the **Frequency** tab of a Master PM record, note the **Update Existing PMs?** checkbox. When this box is ticked, all fields underneath it — such as Frequency, Frequency Units, and Alert Lead — are updated in associated PMs when changes are made.

The **Seasonal Dates** tab includes an **Update Existing PMs Seasonal Dates?** checkbox, which controls whether seasonal date changes cascade. The **Job Plan Sequence** tab contains an **Update Job Plan Sequence in Existing PMs?** checkbox, which determines whether job plan sequence changes cascade.

The screenshot displays the IBM Master PM Frequency tab within a web browser. The interface includes a top navigation bar with tabs for List, Master PM, Frequency, Seasonal Dates, and Job Plan Sequence. The Frequency tab is active, showing a 'Work Order Generation Information' section with checkboxes for 'Use Last Work Order's Start Information to Calculate Next Due Frequency?' and 'Update Existing PMs?'. Below this, there are fields for 'Frequency' (set to 0) and 'Frequency Units' (set to DAYS). On the right side, there are fields for 'Alert Limit (Days)' (set to 0) and 'Next Due Date (Used During PM Create Only)'. At the bottom, there is a checkbox for 'Update Time Based Information in Existing PMs' which is currently unchecked. The browser's address bar shows a URL starting with 'maximo27.torolab.ibm.com'.

Master PM Frequency tab showing the Update Existing PMs? and Update Time Based Information in Existing PMs? checkboxes, with the fields that will cascade when checked.

The main Master PM tab does not have an "Update Existing PMs?" checkbox. Fields on this tab — such as Work Type, Work Order Status, Work Order Priority, and Lead Time — are unique to the Master PM and are not cascaded to associated PMs.



Master PM main tab showing fields that do not cascade, such as Work Type, Work Order Status, and Lead Time.

Step 10: Prevent cascading updates for a specific PM

To exclude a specific PM from receiving updates from its Master PM, open the associated **Preventive Maintenance** record, for example **IC-12100: Forklift #1 Quarterly Inspection and Certification**. Locate the **Override Updates from Master PM?** checkbox near the top of the record, and tick it to prevent this PM from receiving any future updates from the Master PM, even if other associated PMs are updated.

The screenshot shows the IBM ConnectWise Preventive Maintenance record for IC-12100. The record is titled "Forklift #1 Quarterly Inspection and Certification". The "Master PM" is "Master PM Pump Maintenance". The "Site" is "BEDFORD". The "Status" is "DRAFT". The "Override Updates from Master PM?" checkbox is checked. The "Forecast Dates Locked?" checkbox is also checked. The "Forecast Exists?" checkbox is unchecked. The "Details" section shows the "Location" as "Forklift #1", the "Asset" as "Forklift #1", and the "Route" as "Forklift #1". The "Work Order Information" section shows the "Job Plan" as "JP1314A", the "Work Type" as "PM", the "Work Order Status" as "WSCH", the "Priority" as "7", and the "Description" as "Conveyor Belt 3 Month Service". The "Resource Information" section shows the "GL Account" as "CENTRAL", the "Stereom" as "CENTRAL", and the "Stereom Site" as "BEDFORD".

Preventive Maintenance record for IC-12100 with the Override Updates from Master PM? checkbox ticked, ensuring this PM will not receive cascaded updates.

When this override is enabled, all other associated PMs continue to receive updates from the Master PM, except the one or ones with the override checked.

Summary

Following these steps, you can:

- Create and modify a preventive maintenance record and associate it with a Master PM.
- Identify which Master PM fields cascade to associated PMs — those with an "Update Existing PMs?" checkbox.
- Recognize that fields on the main Master PM tab do not cascade.
- Exclude specific PMs from receiving cascaded updates by enabling **Override Updates from Master PM?** on the individual PM record.

This gives you precise control over which preventive maintenance records are updated when changes are made to a Master PM, supporting both broad, site-wide updates and granular, record-specific exceptions.