OpsPilot

PM Job Plan — User Manual

Audit-Ready Preventive Maintenance Job Plans · AI Engineering Co-Pilot

What this guide covers — what a PM Job Plan is, how the OpsPilot module builds one that survives audit, what to have ready, and the document you receive.

1. What is a PM Job Plan?

A PM Job Plan is one specific recurring preventive-maintenance task — written once, approved as a controlled document, and copied into every work order it triggers. It is the master instruction for “the monthly inspection on this pump” or “the annual overhaul of this valve.” Its quality lives or dies on one thing: whether each step has a quantitative accept/reject criterion, or just a vague verb.

“Check the belt tension” is not a job plan step — two maintainers will judge it differently. “Measure belt deflection at mid-span; accept 10–12 mm, reject outside; record the reading” is. OpsPilot forces every step to that standard.

2. What the OpsPilot module does

Role	Responsibility
🎯 **AI Coach (OpsPilot)**	Builds a fully scoped PM Job Plan, challenges vague verbs, and forces every step into a quantitative accept/reject criterion so the document survives review by planners, supervisors, contractors and audit.
👷 **Reliability / Maintenance Engineer (you)**	Provide the asset, the failure modes the PM addresses, the operating context, and the site reality — resources, isolations, permits and parts.

3. How it works — the process

#	Stage
1	Document identification and source
2	Task basics — type, interval, trigger
3	Purpose, scope and the failure modes addressed
4	Asset and operating context
5	Resources — trades, headcount, hours, competencies

#	Stage
6	Tools, instruments, spares, consumables
7	Safety, risk and environmental
8	Pre-task requirements
9	Step-by-step procedure with accept/reject criteria
10–14	Post-task and restore, QA sign-off, CMMS feedback, schedule context, references and approvals

4. What you will be asked — have this ready

- The asset and the specific failure modes this PM is meant to catch or prevent.
- The task type, interval and trigger (calendar, runtime, condition).
- The resources — trades, headcount, hours and competencies — and the tools, instruments, spares and consumables.
- The safety requirements, isolations and permits, and the measurable accept/reject value for each check.

Tip — come with numbers. Every “inspect / check / verify” needs a target and a tolerance, or the step isn't auditable.

5. What you receive — the output

A complete PM Job Plan (Word): header, scope, asset context, resources, tools and spares, safety, pre-task setup, the step-by-step procedure with quantitative accept/reject criteria, post-task and restore, QA sign-off, CMMS feedback fields, schedule context, references and approvals.

6. Worked example (illustrative)

A monthly PM on a pump. The weak version says “inspect coupling, check alignment, grease bearings.” OpsPilot won't accept it. The coupling step becomes “measure coupling gap; accept 2–4 mm; reject outside; record.” The grease step gets the calculated quantity, not “grease as needed.” Each step is tied back to the failure mode it addresses — so a planner, a contractor and an auditor all execute and verify it the same way. That is the difference between a PM that produces data and one that produces a tick.

7. Getting the best result

- **Quantify every step.** A target and a tolerance turns a judgement call into a measurement.
- **Tie steps to failure modes.** If a step doesn't address a failure mode, ask why it's there.
- **Write once, reuse everywhere.** The job plan is the controlled master that every work order copies.
- **Build in the CMMS feedback.** Readings captured against the plan become the trend that improves it.