Northwestern | FACILITIES CONNECT

OPERATIONS & MAINTENANCE



Preventive Maintenance

CREATE A NEW JOB PLAN



CREATE A NEW JOB PLAN

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for adding new Job Plan in Facilities Connect.

The purpose of this document is to serve as guided reference and/or new hire training on Facilities Connect functionality.

VERSION INFORMATION (THIS DOCUMENT)

Version 1.1 Release Date 03/04/2022

Owner **NU Facilities**

Version This is the original version of the document; content within represents delivered system functionality at Building Equipment Assets go-live

(2/5/2019), and has been verified as up-to-date of this document's

release (03/04/2022)

REVISION HISTORY

Most Recent →

Version	Release Date	Action	Owner
1.1	03/04/2022	Updated	NU Facilities
1.0	11/15/2021	Created	NU Facilities

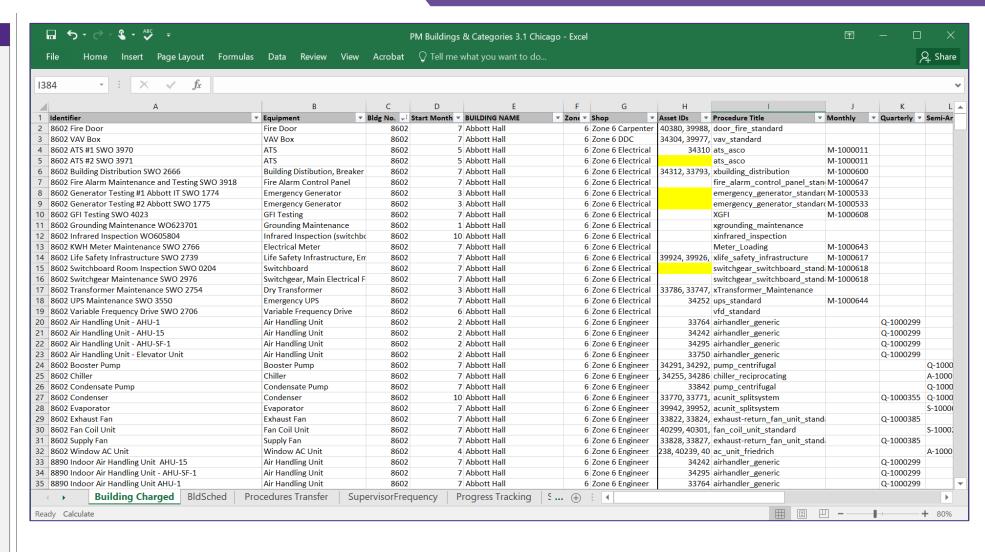


NOW VIEWING

PM BUILDING & CATEGORIES

▼ GETTING STARTED

- Before you begin on Facilities Connect, you will need to access the PM Buildings and Categories master list. This guide will refer to the list throughout the instructions.
- In order to create Job Plans as outlined in this job guide, the user <u>must</u>:
 - a) Possess the Asset Manager role and responsibilities



▶ PROCESS



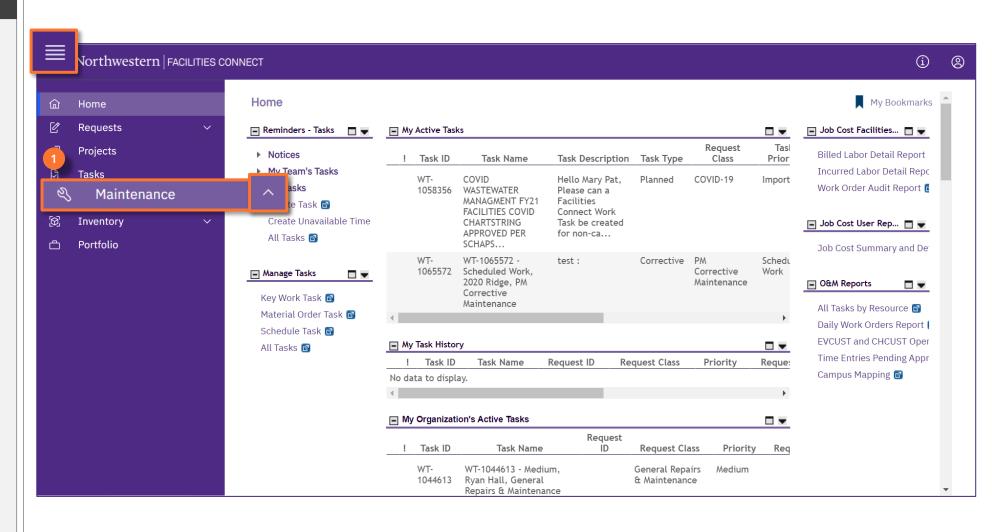
NOW VIEWING

HOME SCREEN

▼ PROCESS

1) Once you have the PM Buildings and Categories list for the correct campus, you can begin the steps in Facilities Connect.

Click on the drop now next to the Maintenance section in the hamburger menu of the Facilities Connect Home Screen.



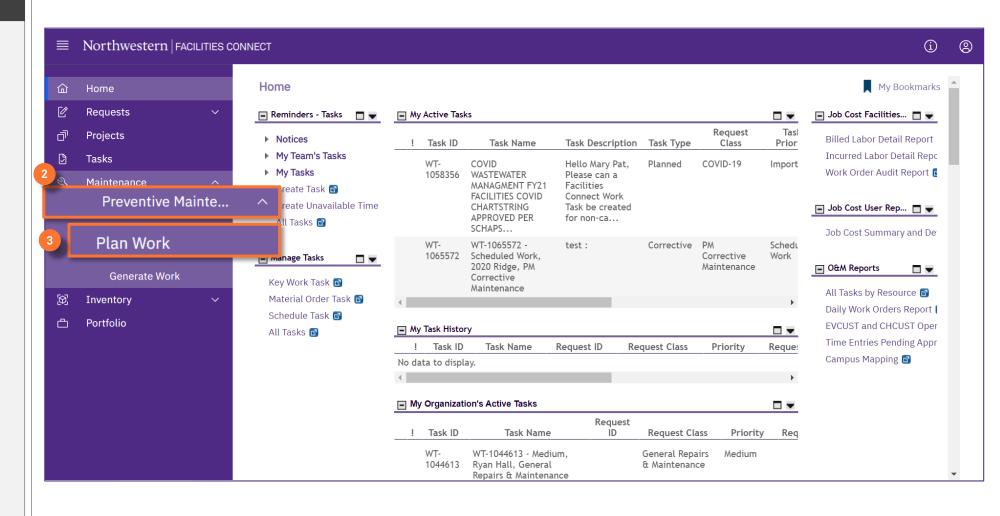


NOW VIEWING MAINTENANCE SCREEN

▼ PROCESS

- 2) Locate the Preventive Maintenance drop down menu.
- B) Click on the **Plan Work** option.

<<Upon clicking, the **Plan Work** screen will open in the main window>>



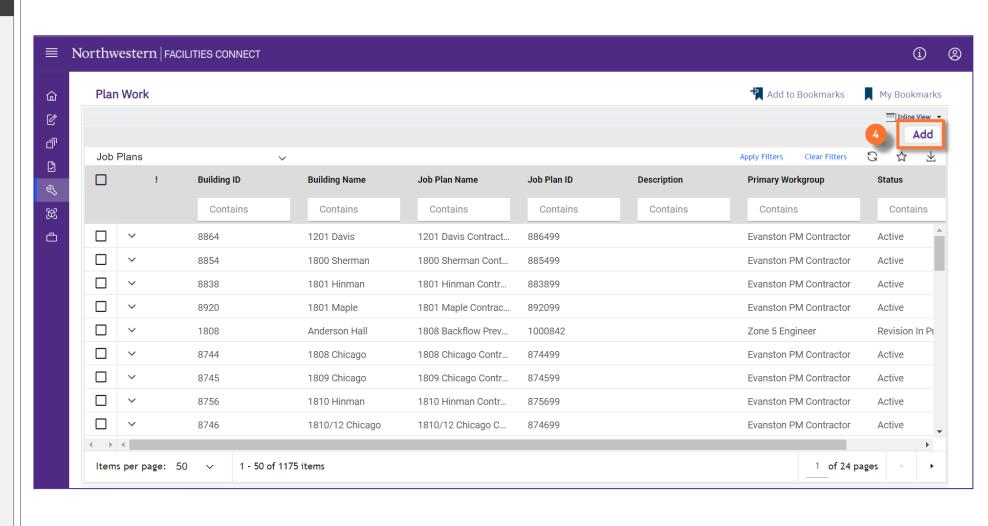


NOW VIEWING PLAN WORK SCREEN

▼ PROCESS

4) Click on the Add button.

<<Upon clicking, a new Job Plan screen will
open in a new window>>





▼ PROCESS

To complete the **Job Plan**, provide the following information:

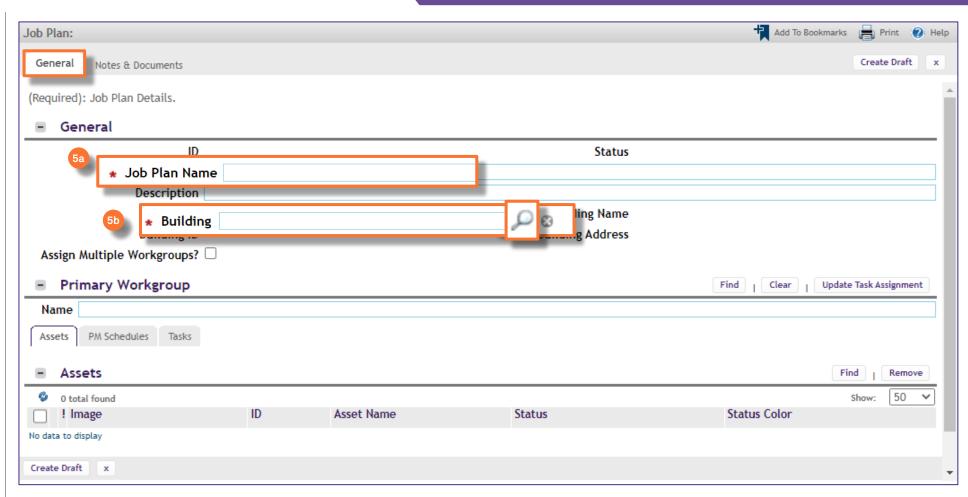
Start on the General tab.

- 5) General section:
 - a) Name name convention follows:
 - 1. The Building Name.
 - 2. The Asset or Category.
 - 3. The **SWO** the job plan may be attached to.
 - b) Building enter the Building Number or use the magnifying glass to locate the building.

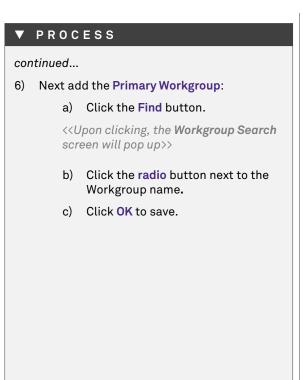
► INFORMATION

PM Building and Category master list:

- Building Name column E
- Asset/Category column B
- SWO columns R-U
- Building Number column C



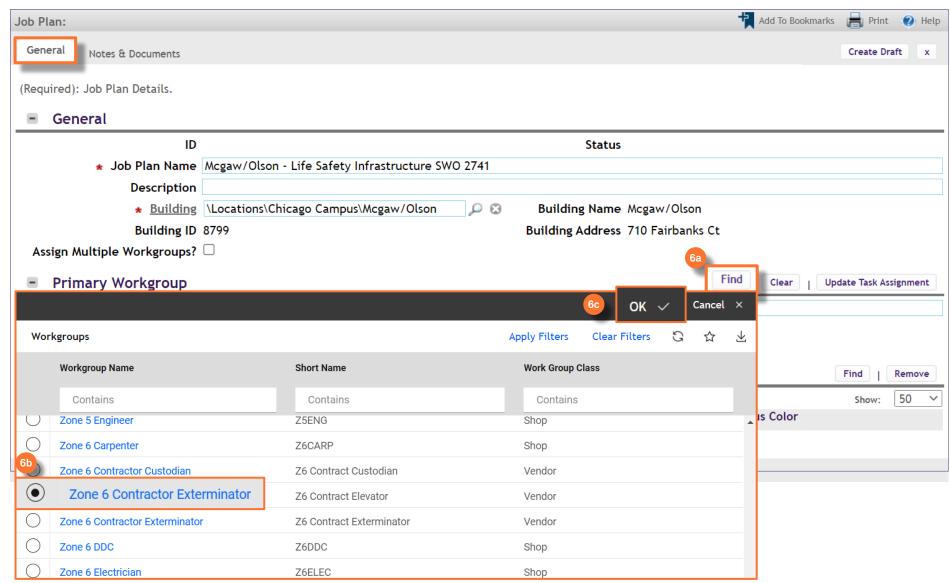




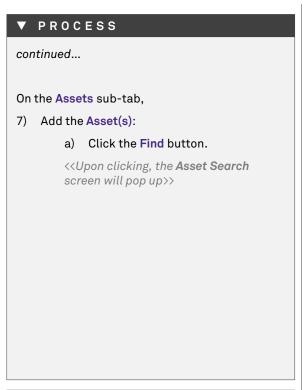
► INFORMATION

PM Building and Category master list:

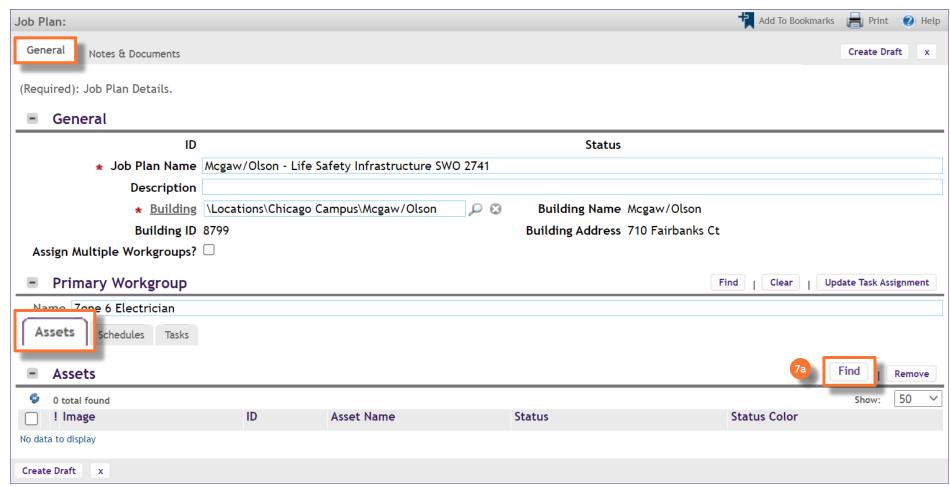
- Zone column F
- Shop column G



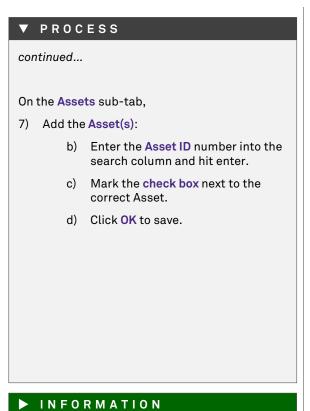


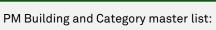


► INFORMATION PM Building and Category master list: ■ Asset ID – column H

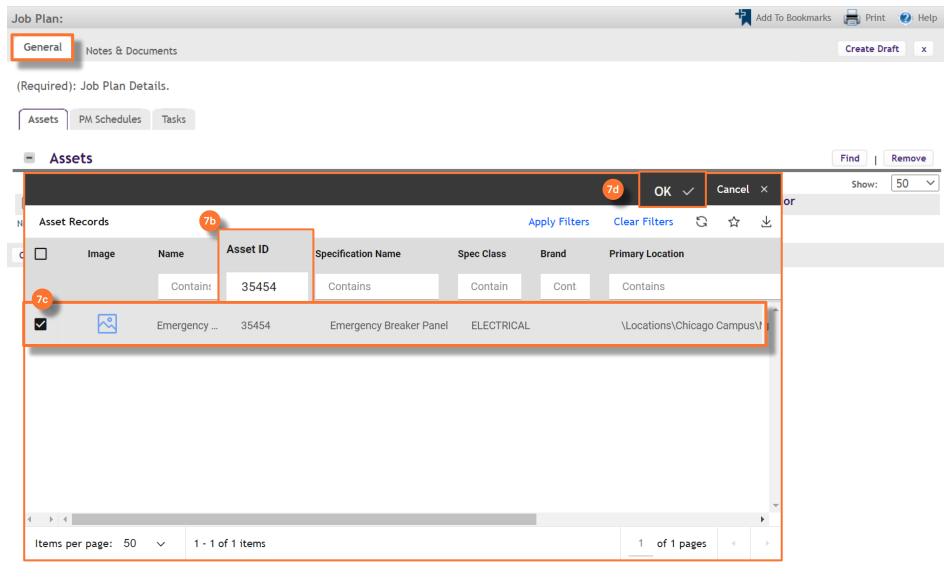




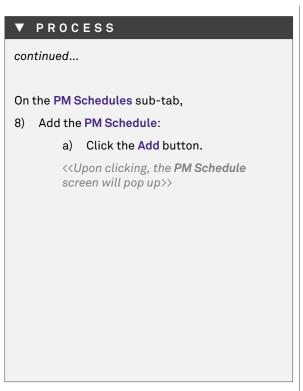




Asset ID – column H



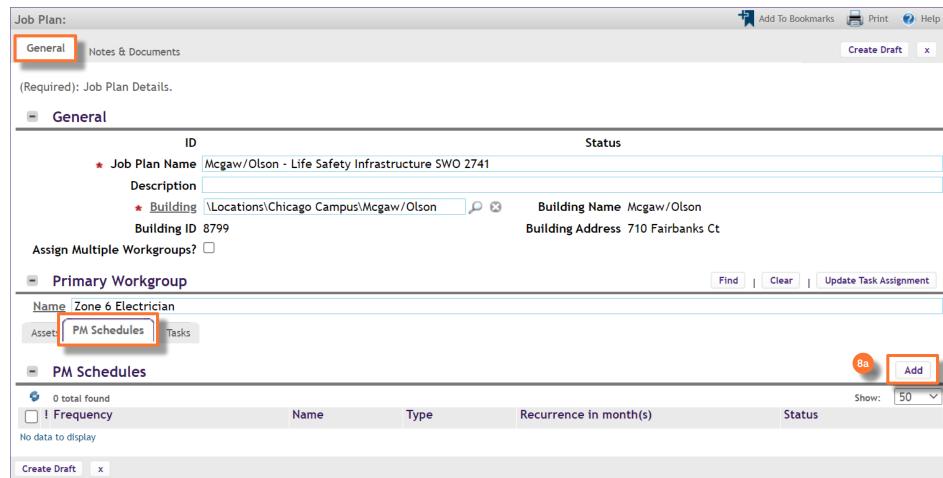




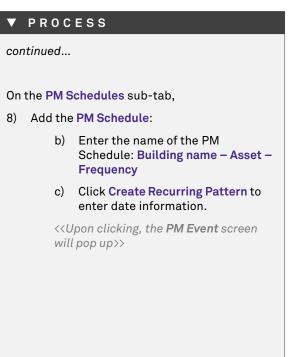
► INFORMATION

PM Building and Category master list:

- Procedure Title column I
- Frequency columns J-0



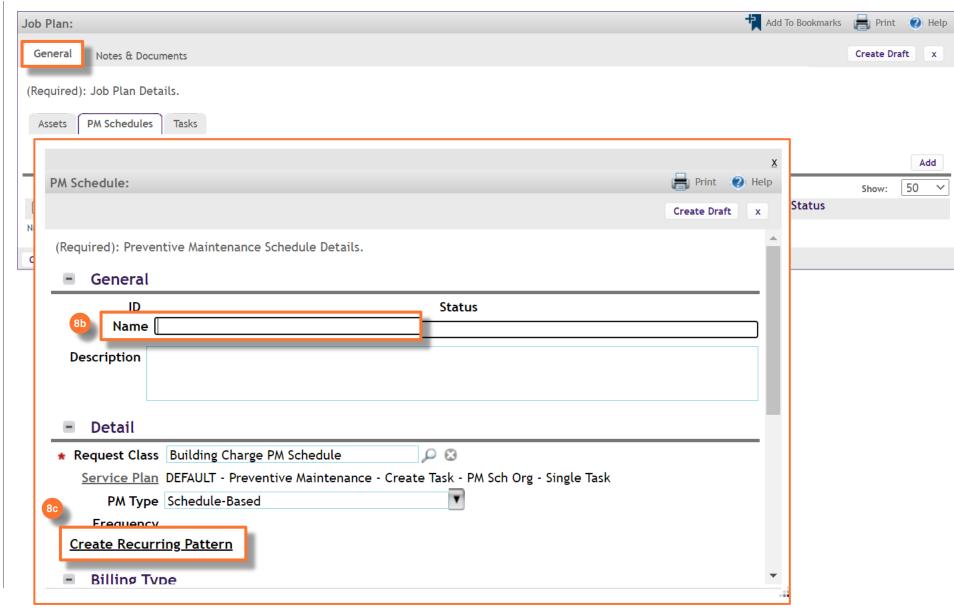




► INFORMATION

PM Building and Category master list:

- Procedure Title column I
- Frequency columns J-0





▼ PROCESS continued...

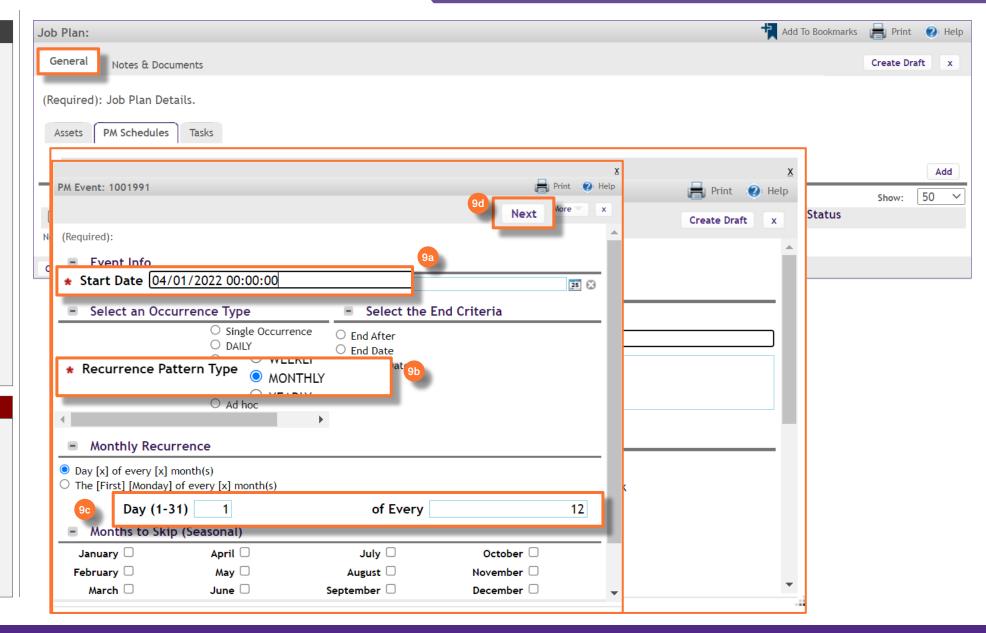
On the PM Schedules sub-tab,

- 9) Add the PM Schedule:
 - a) Enter the **State Date** for the procedure.
 - b) DO NOT change the Recurrence Pattern Type from the Monthly option.
 - c) Enter the Day of the month the recurrence will occur and the number of months between the recurrence.
 - d) Click Next.

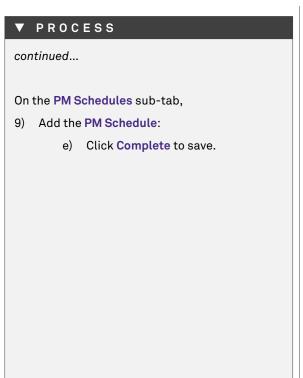
▼ IMPORTANT

When entering PM Schedules, if it exists, the **Annual** procedure should always be entered first.

Additionally, even though it is an Annual procedure, always select the MONTHLY Recurrence Patter Type option, not the yearly option.



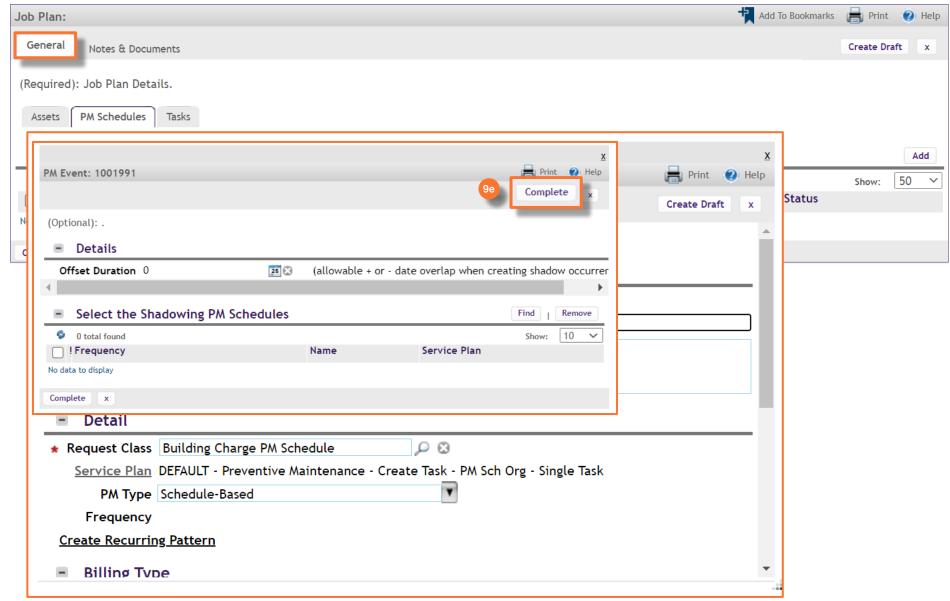




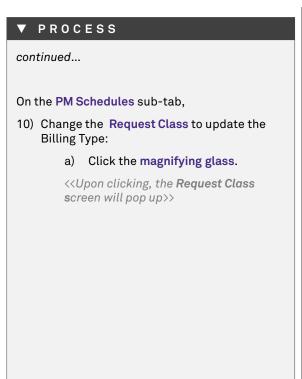
▼ IMPORTANT

When entering PM Schedules, if it exists, the **Annual** procedure should always be entered first.

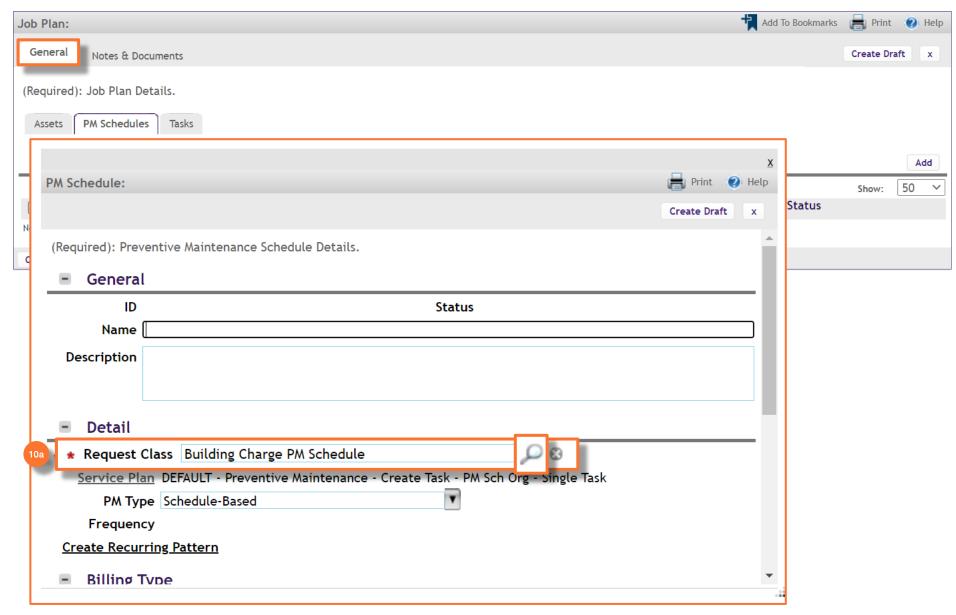
Additionally, even though it is an Annual procedure, always select the MONTHLY Recurrence Pattern Type option, not the yearly option.



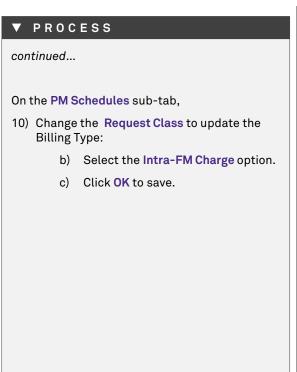




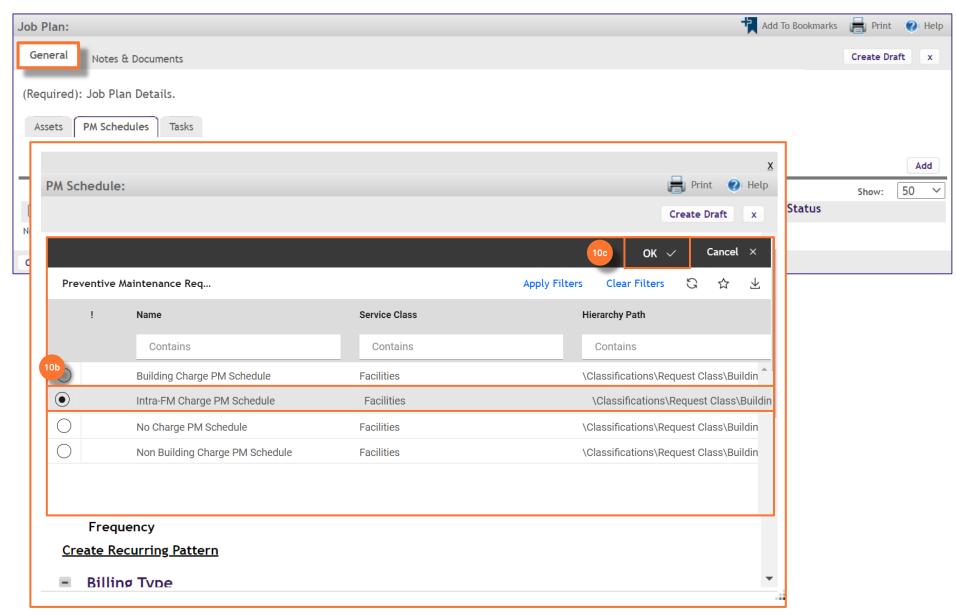
► INFORMATION



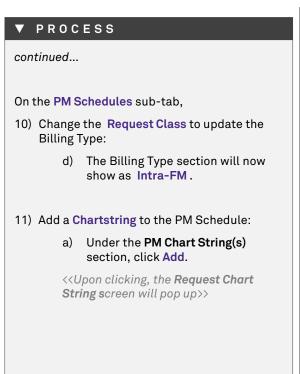




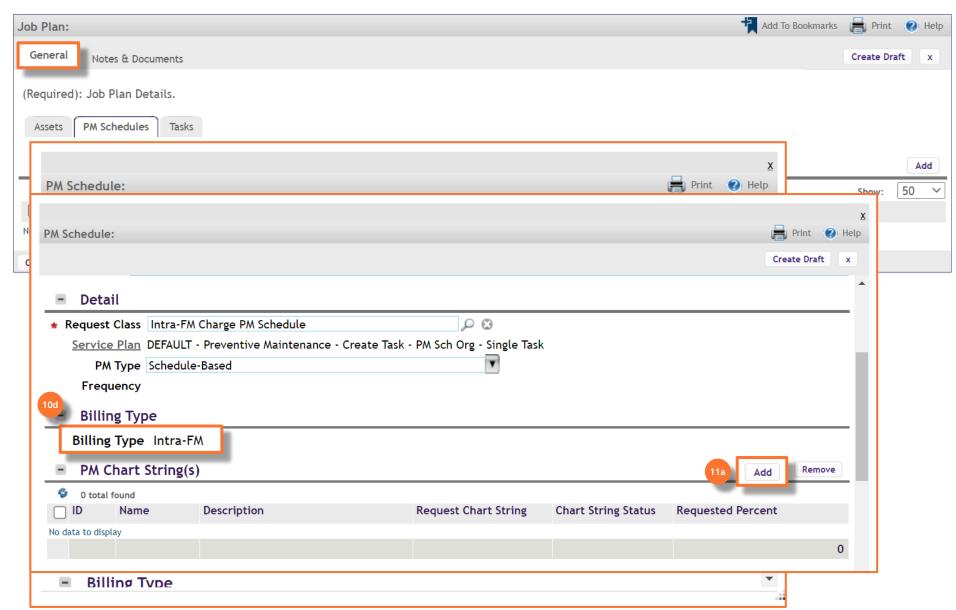
► INFORMATION



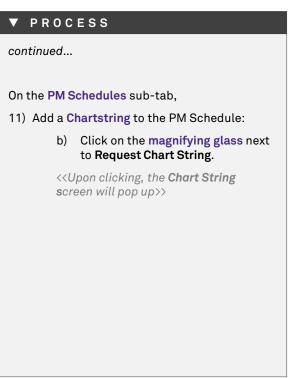




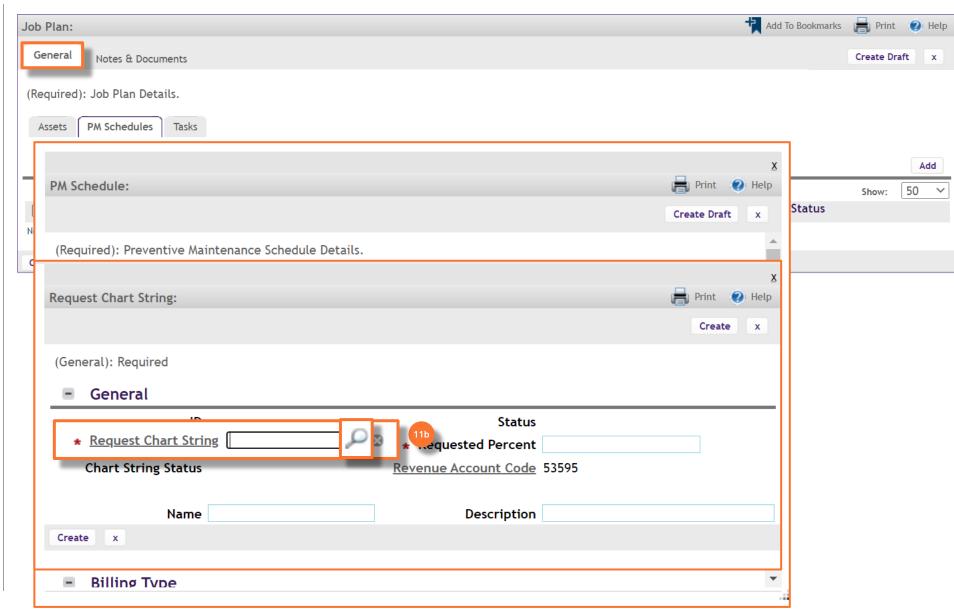
► INFORMATION



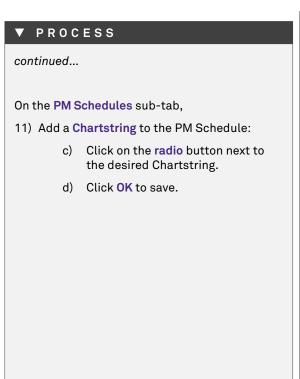




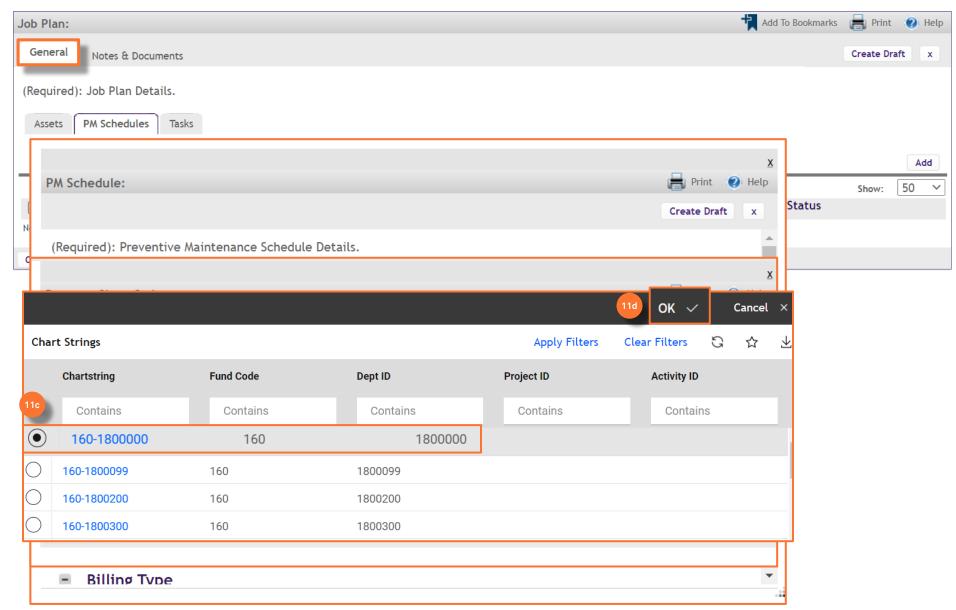
► INFORMATION



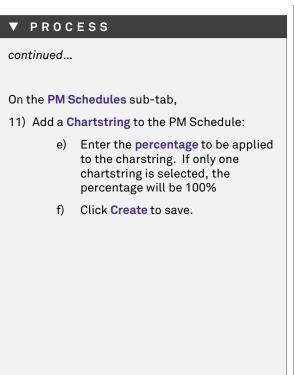




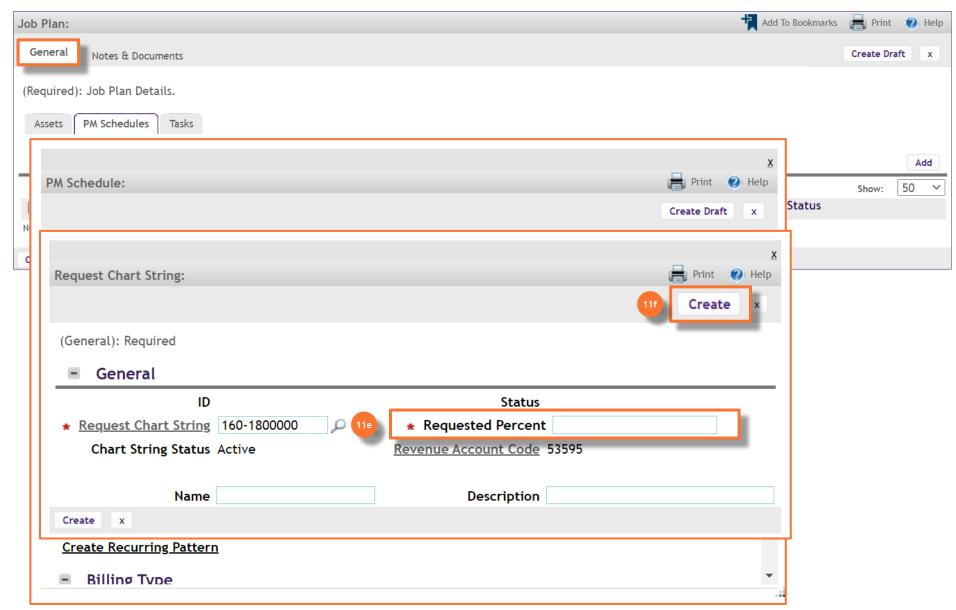
► INFORMATION



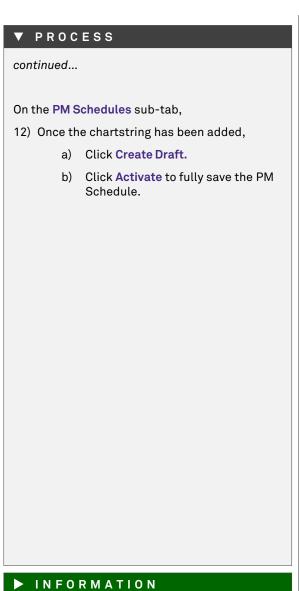


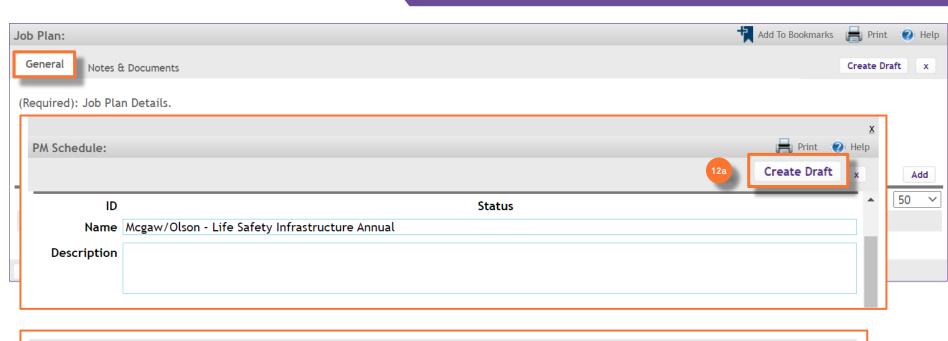


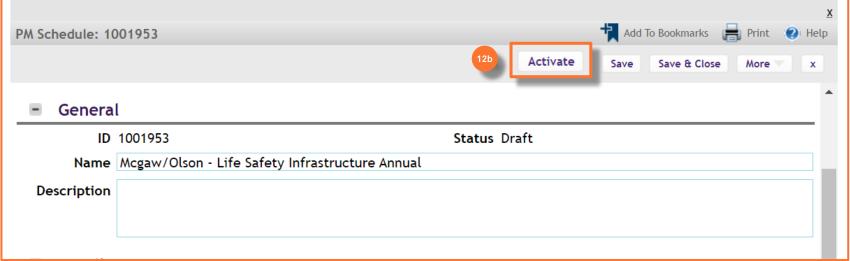
Billing Type and **Chartstring** information can be found on a master list provided by the Reliability Engineer.





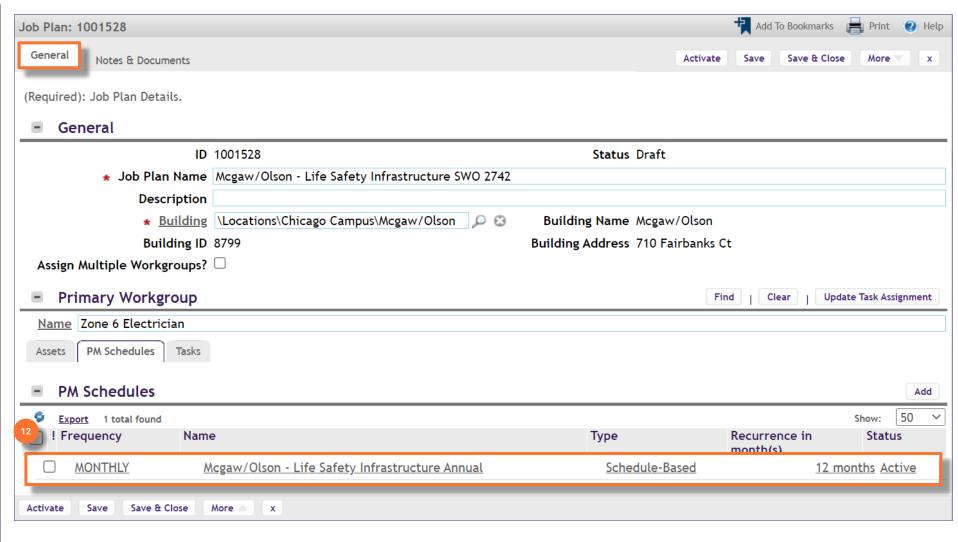






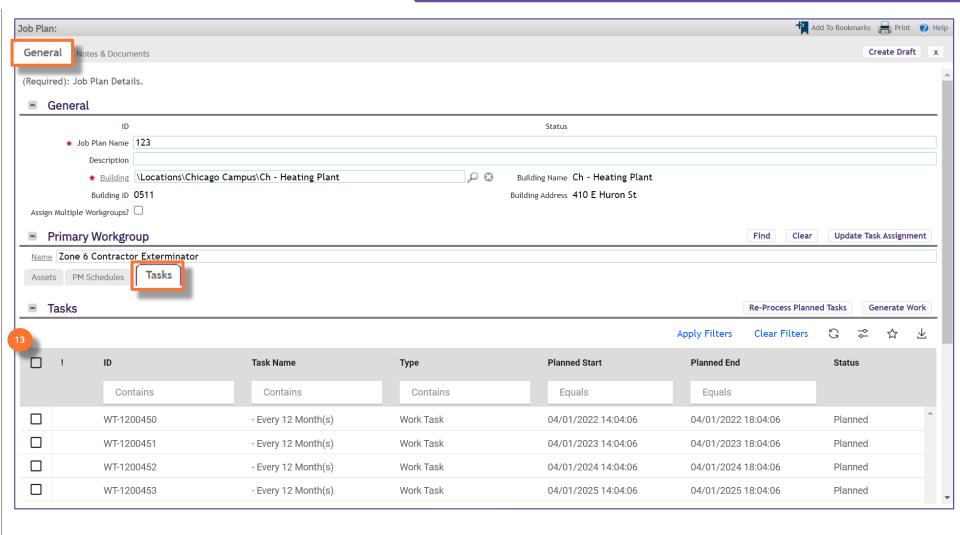




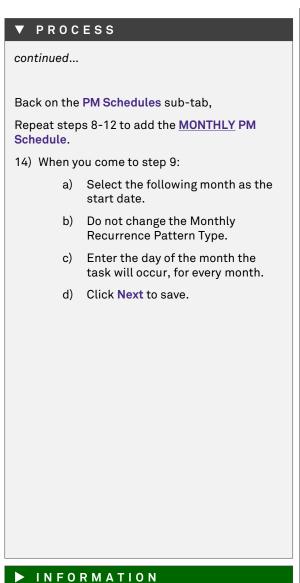


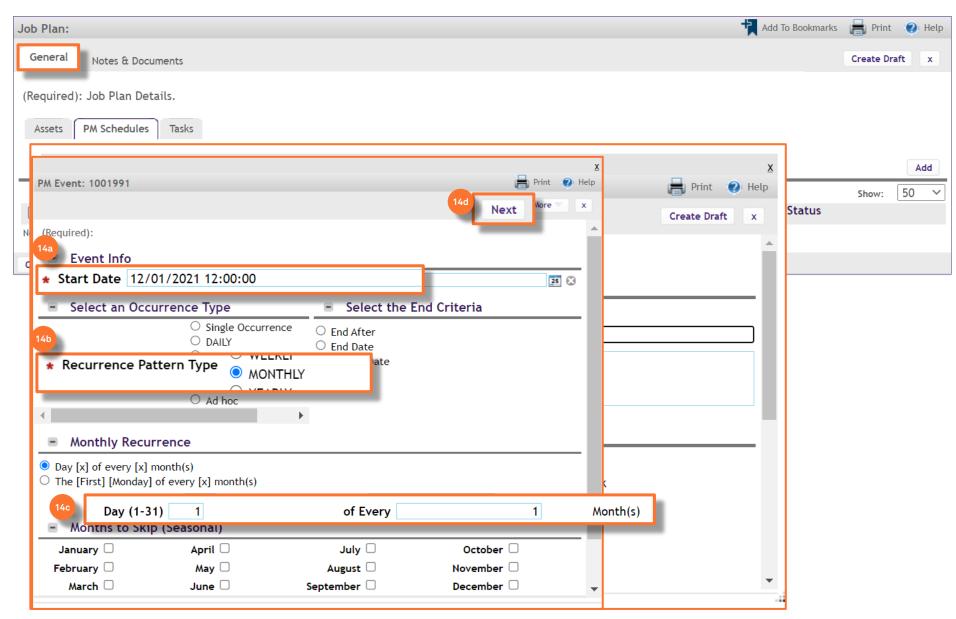


▼ PROCESS continued... On the Tasks sub-tab, 13) The individual Job Plan Work Tasks will populate.

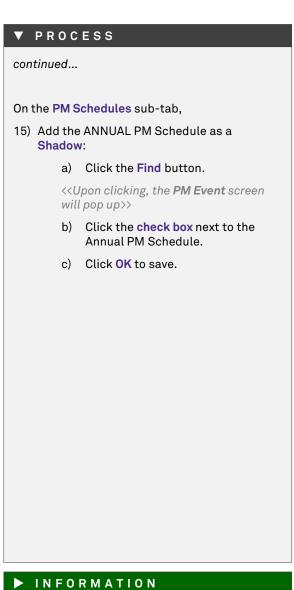


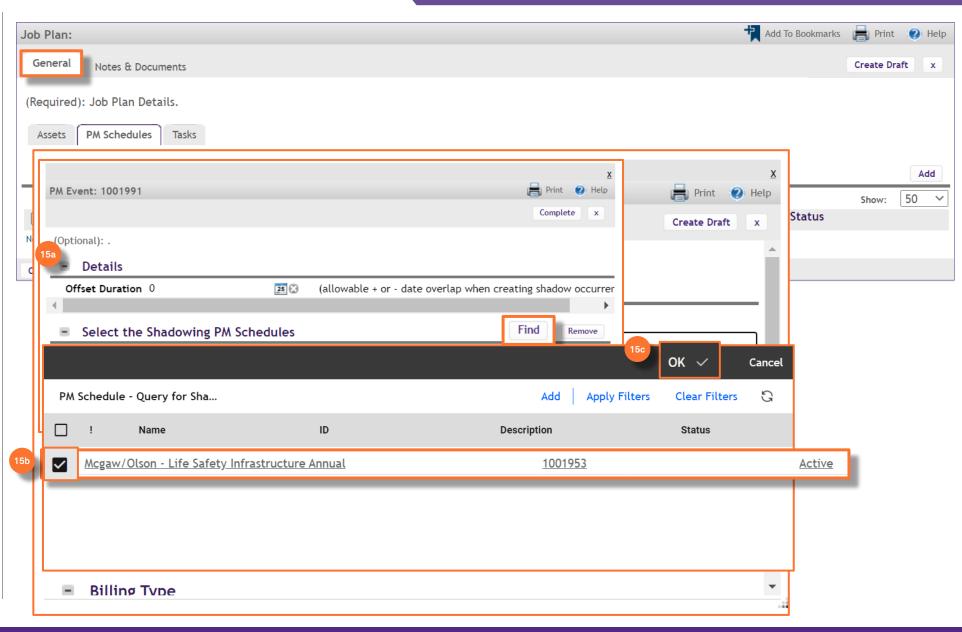




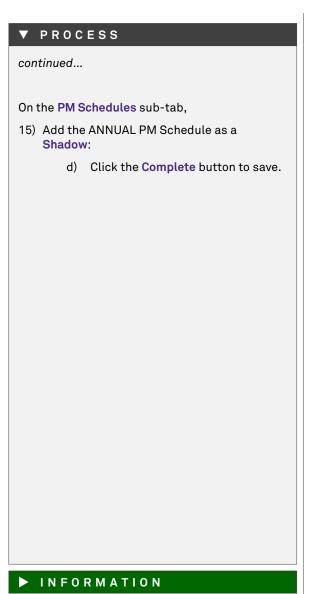


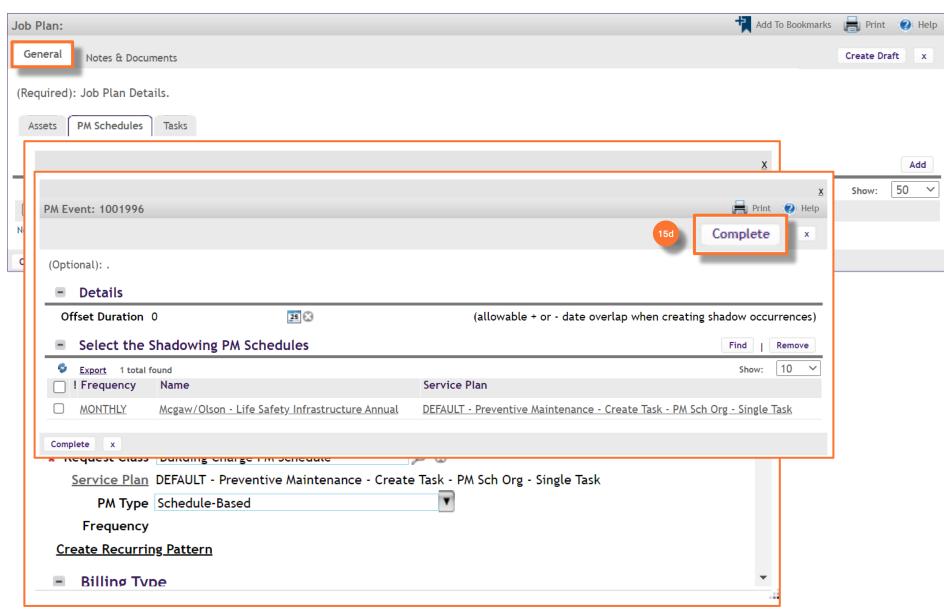






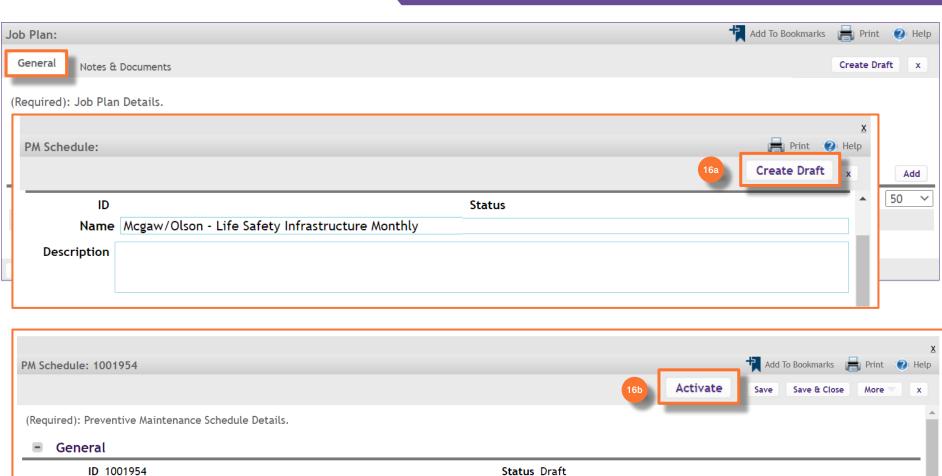








▼ PROCESS continued... On the PM Schedules sub-tab, 16) When you have entered all the information for the MONTHLY PM Schedule, including chartstring, a) Click Create Draft. b) Click Activate to fully save the Monthly PM Schedule.



► INFORMATION

Name Mcgaw/Olson - Life Safety Infrastructure Monthly

Description

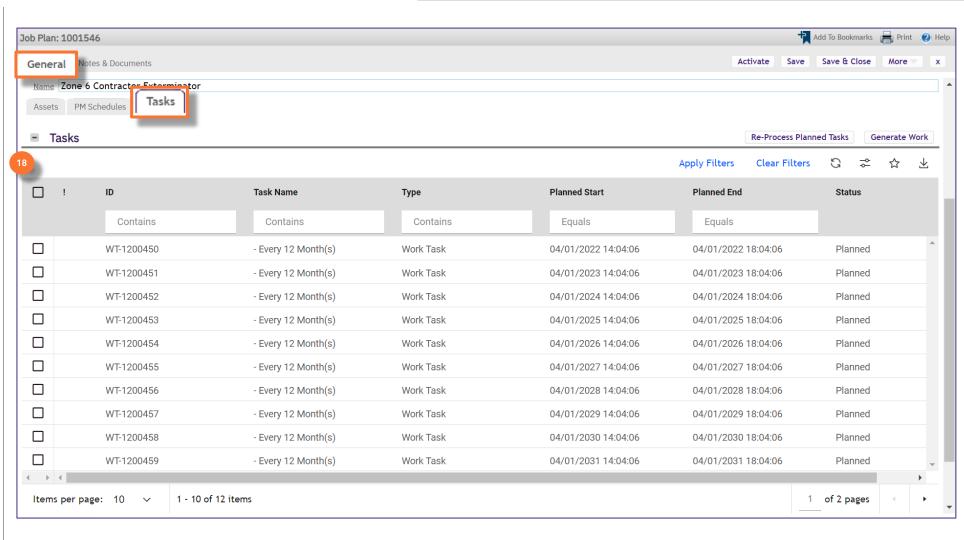


▼ PROCESS continued... On the PM Schedules sub-tab, 17) BOTH the Annual and the Monthly PM Schedules will now appear on the Job Plan window.

Job Plan: 1001546							切	Add To Bookmarks	Print	: Pelp	
General Notes & Docum	ments					Activate	Save	Save & Close	More	x	
(Required): Job Plan Deta	ails.									_	
General										- 1	
ID	1001546			Status Draft						_	
★ Job Plan Name	123										
Description		II e SI e	0.0	GI 11 41	DI .						
* Building Building ID	\Locations\Chicago Campus\Ch - Heating Plant Dilding Name Ch - Heating Plant Building Address 410 E Huron St										
Assign Multiple Workgroups?				building Address 410 L Huro	111 30						
Primary Workgr						Find	Clear	Update Ta	sk Assiann	ment	
Name Zone 6 Contract						Tillu	Cicai	opdate la	ISK ASSIGNIN		
Assets PM Schedules											
Assets Fin schedules	10303										
PM Schedules										Add	
						Apply Filters	Clear I	Filters 🖔	☆	$\overline{\tau}$	
☐ ! Freque	ency	Name	Туре		Recurrence in mon	nth(s)	Sta	ntus			
Cor	ntains	Contains	Contains		Equals			Contains			
☐ MONT	ΓHLY	123	Schedule-Based			10	0 months Draft				
П момт	THLY		Schedule	-Based		121	nonths	Active			
Items per page: 10	∨ 1 - 2 of 2 items						1	of 1 pages	4)	

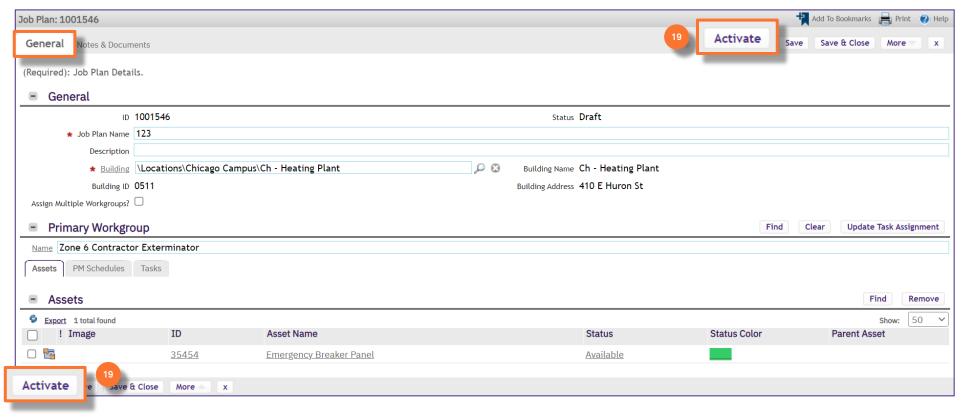


▼ PROCESS continued... On the Tasks sub-tab, 18) ALL Job Plan Work Tasks will populate and appear.











PLAN WORK SCREEN NOW VIEWING

