Preventive Maintenance
# CREATE JOB PLANS USING TEMPLATES

# CREATE A NEW JOB PLAN WITH TEMPALTE

## DOCUMENT SUMMARY

This job guide provides step-by-step instruction for adding bulk job plans in Facilities Connect using an excel template.

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

## VERSION INFORMATION (THIS DOCUMENT)

| | | | |
|---|---|---|---|
| Version | **1.1** | Release Date | **03/04/2022** |
| Owner | **NU Facilities** | | |
| Version Notes | **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

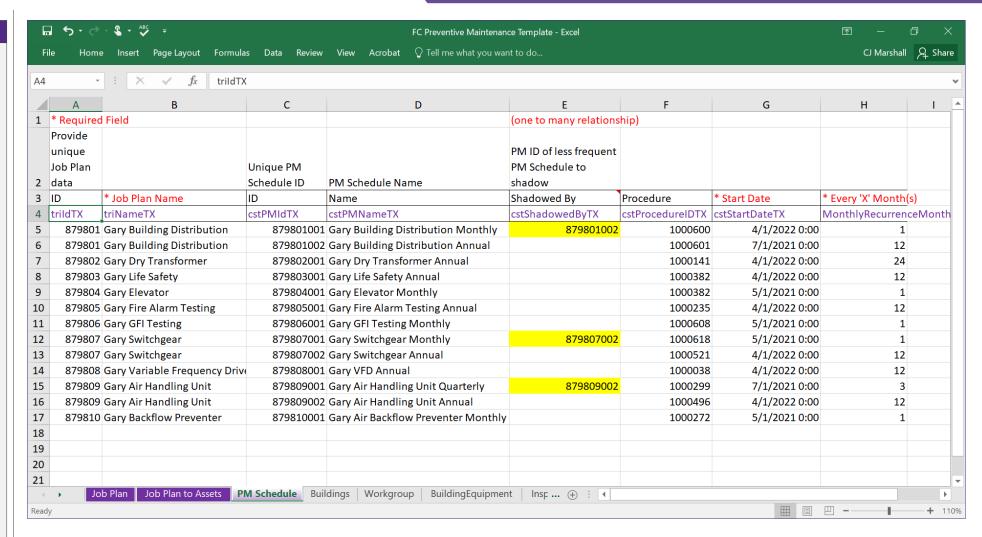|  | Version | Release Date | Action | Owner |
|---|---|---|---|---|
| Most Recent → | 1.1 | 03/04/2022 | Updated | NU Facilities |
| | 1.0 | 11/01/2021 | Created | NU Facilities |
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| | -- | -- | -- | -- |
| | -- | -- | -- | -- |

NOW VIEWING · EXCEL TEMPLATE

## ▼ GETTING STARTED

❖ This process will happen <u>outside</u> of **Facilities Connect.**

❖ Using the provided **Template**, you will enter the information for Job Plans and NUIT will bulk upload that information to Facilities Connect.

❖ **While the FC Preventive Maintenance Template consists of many worksheets, the only worksheets we will be modifying are "Job Plan," "Job Plan to Assets," and "PM Schedule."** The tabs for these worksheets are highlighted purple.

▶ PROCESS

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FC Preventive Maintenance Template - Excel

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File · Home · Insert · Page Layout · Formulas · Data · Review · View · Acrobat · ♀ Tell me what you want to do...

A4 : trildTX

| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | * Required Field | | | | (one to many relationship) | | | | |
| 2 | Provide unique Job Plan data | | Unique PM Schedule ID | PM Schedule Name | PM ID of less frequent PM Schedule to shadow | | | | |
| 3 | ID | * Job Plan Name | ID | Name | Shadowed By | Procedure | * Start Date | * Every 'X' Month(s) | |
| 4 | trildTX | triNameTX | cstPMIdTX | cstPMNameTX | cstShadowedByTX | cstProcedureIDTX | cstStartDateTX | MonthlyRecurrenceMonth | |
| 5 | 879801 | Gary Building Distribution | 879801001 | Gary Building Distribution Monthly | 879801002 | 1000600 | 4/1/2022 0:00 | 1 | |
| 6 | 879801 | Gary Building Distribution | 879801002 | Gary Building Distribution Annual | | 1000601 | 7/1/2021 0:00 | 12 | |
| 7 | 879802 | Gary Dry Transformer | 879802001 | Gary Dry Transformer Annual | | 1000141 | 4/1/2022 0:00 | 24 | |
| 8 | 879803 | Gary Life Safety | 879803001 | Gary Life Safety Annual | | 1000382 | 4/1/2022 0:00 | 12 | |
| 9 | 879804 | Gary Elevator | 879804001 | Gary Elevator Monthly | | 1000382 | 5/1/2021 0:00 | 1 | |
| 10 | 879805 | Gary Fire Alarm Testing | 879805001 | Gary Fire Alarm Testing Annual | | 1000235 | 4/1/2022 0:00 | 12 | |
| 11 | 879806 | Gary GFI Testing | 879806001 | Gary GFI Testing Monthly | | 1000608 | 5/1/2021 0:00 | 1 | |
| 12 | 879807 | Gary Switchgear | 879807001 | Gary Switchgear Monthly | 879807002 | 1000618 | 5/1/2021 0:00 | 1 | |
| 13 | 879807 | Gary Switchgear | 879807002 | Gary Switchgear Annual | | 1000521 | 4/1/2022 0:00 | 12 | |
| 14 | 879808 | Gary Variable Frequency Drive | 879808001 | Gary VFD Annual | | 1000038 | 4/1/2022 0:00 | 12 | |
| 15 | 879809 | Gary Air Handling Unit | 879809001 | Gary Air Handling Unit Quarterly | 879809002 | 1000299 | 7/1/2021 0:00 | 3 | |
| 16 | 879809 | Gary Air Handling Unit | 879809002 | Gary Air Handling Unit Annual | | 1000496 | 4/1/2022 0:00 | 12 | |
| 17 | 879810 | Gary Backflow Preventer | 879810001 | Gary Air Backflow Preventer Monthly | | 1000272 | 5/1/2021 0:00 | 1 | |
| 18 | | | | | | | | | |
| 19 | | | | | | | | | |
| 20 | | | | | | | | | |
| 21 | | | | | | | | | |

Job Plan | Job Plan to Assets | **PM Schedule** | Buildings | Workgroup | BuildingEquipment | Insp ... ⊕

Ready — 110%

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## ▼ PROCESS

To begin, open the **FC Preventive Maintenance Template** excel spreadsheet.

1) Start entering the information on the **Job Plan** tab:

   a) **ID** – generated by the user. Standard formatting is the first four digits of the building ID number (in this case Gary's building ID 8798) and then a two digit suffix starting with "01" and increasing sequentially as job plans are added. The only exception is the "99" suffix, which is being used for contractor PM job plans. In other words, for example if we were to reach job plan 879898, the next job plan would be 8798100.

   b) **Job Plan Name** – generated by the user. Typically includes building name first and equipment assets. Larger/higher-value assets like air handling units typically have one job plan per asset, including the local equipment ID# and location. For example, the air handling unit might be titled, "Gary 5th Floor Air Handling Unit AHU-1". Smaller items like exit signs and fans are typically grouped into a single PM like "Gary 5th Floor Exit Lights".
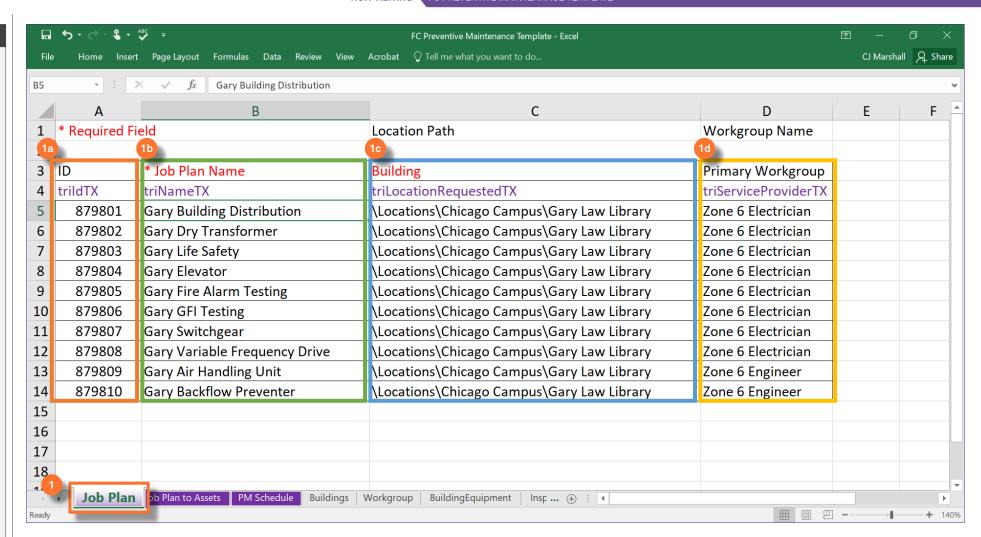
## ▶ INFORMATION

NOW VIEWING   FC PREVENTIVE MAINTENANCE TEMPLATE

## PROCESS

To begin, open the **FC Preventive Maintenance Template** excel spreadsheet.

1) Start entering the information on the **Job Plan** tab (cont.):

   c) **Building** – full building path pulled from Facilities Connect building record.

   d) **Primary Workgroup** – the Workgroup that will complete the job plan.

FC Preventive Maintenance Template - Excel

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CJ Marshall   Share

B5     fx   Gary Building Distribution

| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | * Required Field | | Location Path | Workgroup Name | | |
| 2 | | | | | | |
| 3 | ID | * Job Plan Name | Building | Primary Workgroup | | |
| 4 | triIdTX | triNameTX | triLocationRequestedTX | triServiceProviderTX | | |
| 5 | 879801 | Gary Building Distribution | \Locations\Chicago Campus\Gary Law Library | Zone 6 Electrician | | |
| 6 | 879802 | Gary Dry Transformer | \Locations\Chicago Campus\Gary Law Library | Zone 6 Electrician | | |
| 7 | 879803 | Gary Life Safety | \Locations\Chicago Campus\Gary Law Library | Zone 6 Electrician | | |
| 8 | 879804 | Gary Elevator | \Locations\Chicago Campus\Gary Law Library | Zone 6 Electrician | | |
| 9 | 879805 | Gary Fire Alarm Testing | \Locations\Chicago Campus\Gary Law Library | Zone 6 Electrician | | |
| 10 | 879806 | Gary GFI Testing | \Locations\Chicago Campus\Gary Law Library | Zone 6 Electrician | | |
| 11 | 879807 | Gary Switchgear | \Locations\Chicago Campus\Gary Law Library | Zone 6 Electrician | | |
| 12 | 879808 | Gary Variable Frequency Drive | \Locations\Chicago Campus\Gary Law Library | Zone 6 Electrician | | |
| 13 | 879809 | Gary Air Handling Unit | \Locations\Chicago Campus\Gary Law Library | Zone 6 Engineer | | |
| 14 | 879810 | Gary Backflow Preventer | \Locations\Chicago Campus\Gary Law Library | Zone 6 Engineer | | |
| 15 | | | | | | |
| 16 | | | | | | |
| 17 | | | | | | |
| 18 | | | | | | |

**Job Plan**  Job Plan to Assets  PM Schedule  Buildings  Workgroup  BuildingEquipment  Insp ...

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▶ **INFORMATION**

## PROCESS

2) Next, enter the information on the **Job Plan to Assets** tab:

This tab lists every asset that is associated with each job plan.

a) **ID** – each individual Project ID number. Must exactly match a job plan ID on the "Job Plan" tab.

b) **Job Plan Name** – each individual job plan name. Must exactly match the job plan name for the same job plan ID number on the "Job Plan" worksheet.

c) **Unique Building Equipment ID** – Asset ID number pulled from Facilities Connect asset record.

## INFORMATION

## PROCESS

3) Next, enter the information on the **PM Schedule** tab:

a) **ID** – Job Plan ID number. Must match a number exactly from the previous two tabs.

b) **Job Plan Name** – name given to maintenance job plan. Must exactly match the corresponding job plan name for the same Job Plan ID number from the previous worksheets.

c) **Unique PM Schedule** – building off of the Project ID number, the individual number given to each PM Job Plan Schedule. Each schedule ID is given a unique 3-digit suffix on top of the Job Plan ID. For instance the first schedule for job plan 879801 is 879801001 Each different interval (Monthly, Quarterly, Semi-Annual, and Annual) gets its own PM Schedule.

d) **PM Schedule Name** – building off of the Job Plan name, the individual name given to each PM Job Plan Schedule. Format is generally the job plan name followed by the frequency.

▶ **INFORMATION**

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FC Preventive Maintenance Template - Excel

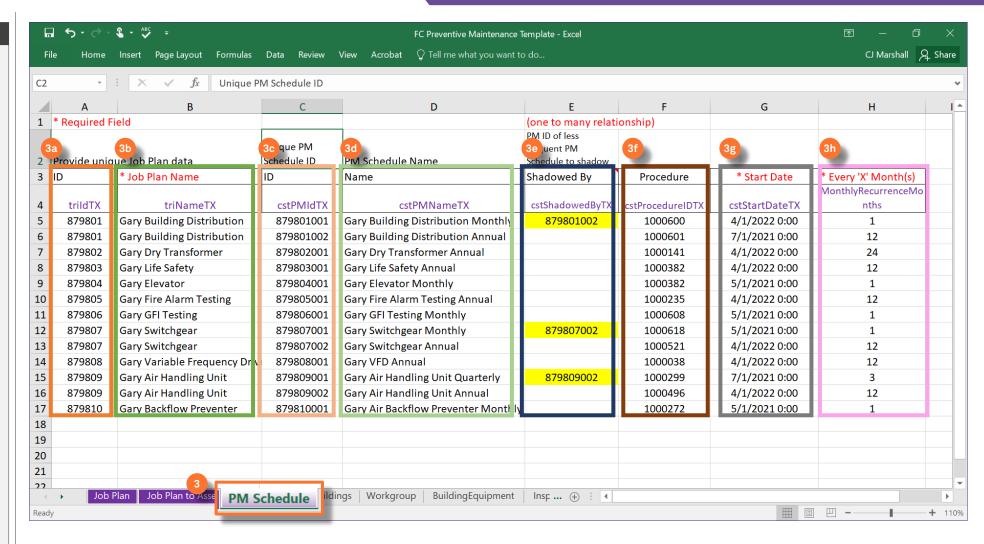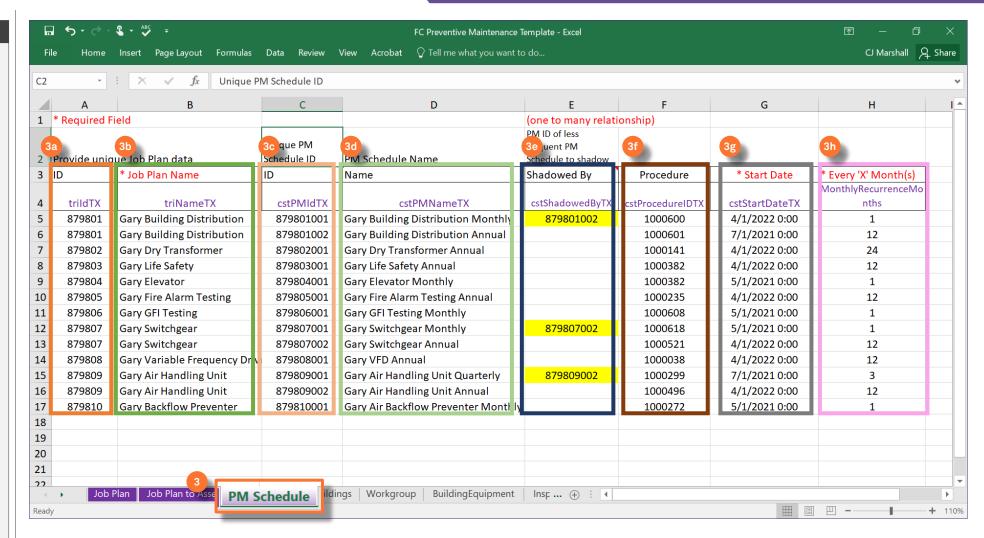File   Home   Insert   Page Layout   Formulas   Data   Review   View   Acrobat   ♡ Tell me what you want to do...   CJ Marshall   Share

C2   |   Unique PM Schedule ID

| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | * Required Field | | | | (one to many relationship) | | | |
| 2 | Provide unique Job Plan data | | Unique PM Schedule ID | PM Schedule Name | PM ID of less frequent PM Schedule to shadow | | | |
| 3 | ID | * Job Plan Name | ID | Name | Shadowed By | Procedure | * Start Date | * Every 'X' Month(s) |
| 4 | triIdTX | triNameTX | cstPMIdTX | cstPMNameTX | cstShadowedByTX | cstProcedureIDTX | cstStartDateTX | MonthlyRecurrenceMonths |
| 5 | 879801 | Gary Building Distribution | 879801001 | Gary Building Distribution Monthly | 879801002 | 1000600 | 4/1/2022 0:00 | 1 |
| 6 | 879801 | Gary Building Distribution | 879801002 | Gary Building Distribution Annual | | 1000601 | 7/1/2021 0:00 | 12 |
| 7 | 879802 | Gary Dry Transformer | 879802001 | Gary Dry Transformer Annual | | 1000141 | 4/1/2022 0:00 | 24 |
| 8 | 879803 | Gary Life Safety | 879803001 | Gary Life Safety Annual | | 1000382 | 4/1/2022 0:00 | 12 |
| 9 | 879804 | Gary Elevator | 879804001 | Gary Elevator Monthly | | 1000382 | 5/1/2022 0:00 | 1 |
| 10 | 879805 | Gary Fire Alarm Testing | 879805001 | Gary Fire Alarm Testing Annual | | 1000235 | 4/1/2022 0:00 | 12 |
| 11 | 879806 | Gary GFI Testing | 879806001 | Gary GFI Testing Monthly | | 1000608 | 5/1/2021 0:00 | 1 |
| 12 | 879807 | Gary Switchgear | 879807001 | Gary Switchgear Monthly | 879807002 | 1000618 | 5/1/2021 0:00 | 1 |
| 13 | 879807 | Gary Switchgear | 879807002 | Gary Switchgear Annual | | 1000521 | 4/1/2022 0:00 | 12 |
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| 15 | 879809 | Gary Air Handling Unit | 879809001 | Gary Air Handling Unit Quarterly | 879809002 | 1000299 | 7/1/2021 0:00 | 3 |
| 16 | 879809 | Gary Air Handling Unit | 879809002 | Gary Air Handling Unit Annual | | 1000496 | 4/1/2022 0:00 | 12 |
| 17 | 879810 | Gary Backflow Preventer | 879810001 | Gary Air Backflow Preventer Monthly | | 1000272 | 5/1/2021 0:00 | 1 |

Tabs: Job Plan | Job Plan to Asse... | **PM Schedule** | ...ildings | Workgroup | BuildingEquipment | Insp ...

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## PROCESS

3) Next, enter the information on the **PM Schedule** tab:

   e) **Shadowed By ID** – the Unique PM Schedule ID of the Job Plan that could replace a job plan. For example, an annual job plan may replace a monthly job plan for one occurrence.

   f) **Procedure ID** – the safety procedure associated with the job plan, pulled from the Asset record. The maintenance procedure, Technically called an "Inspection Procedure" in Facilities Connect, which is to be carried out at the given frequency. Determined in coordination with shop supervisors outside of Facilities Connect.

   g) **Start Date** – the date the job plan will go into effect. The date that the first work task is to be issued by the job plan. This date should always be the first of the month.

   h) **Monthly Recurrence Number** – the frequency of the job plan. The number of months between work tasks to be issued by the job plan. For example, a quarterly schedule would have a recurrence every three months.

## INFORMATION



Spreadsheet: FC Preventive Maintenance Template - Excel

| ID (triIdTX) | * Job Plan Name (triNameTX) | ID (cstPMIdTX) | Name (cstPMNameTX) | Shadowed By (cstShadowedByTX) | Procedure (cstProcedureIDTX) | * Start Date (cstStartDateTX) | * Every 'X' Month(s) (MonthlyRecurrenceMonths) |
|---|---|---|---|---|---|---|---|
| 879801 | Gary Building Distribution | 879801001 | Gary Building Distribution Monthly | 879801002 | 1000600 | 4/1/2022 0:00 | 1 |
| 879801 | Gary Building Distribution | 879801002 | Gary Building Distribution Annual | | 1000601 | 7/1/2021 0:00 | 12 |
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| 879804 | Gary Elevator | 879804001 | Gary Elevator Monthly | | 1000382 | 5/1/2021 0:00 | 1 |
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| 879809 | Gary Air Handling Unit | 879809001 | Gary Air Handling Unit Quarterly | 879809002 | 1000299 | 7/1/2021 0:00 | 3 |
| 879809 | Gary Air Handling Unit | 879809002 | Gary Air Handling Unit Annual | | 1000496 | 4/1/2022 0:00 | 12 |
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NOW VIEWING | FC PREVENTIVE MAINTENANCE TEMPLATE

## PROCESS

3) Once you have completed the **FC Preventive Maintenance Template**:

   a) Email the completed form to the reliability engineer, currently Evan Goldstein at evan.goldstein@northwestern.edu

   b) He will verify form and send to NUIT to load into Facilities Connect.

▶ **INFORMATION**

FC Preventive Maintenance Template - Excel

File — Home — Insert — Page Layout — Formulas — Data — Review — View — Acrobat — Tell me what you want to do...

CJ Marshall — Share

C2 — Unique PM Schedule ID

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| 18 | | | | | | | | |
| 19 | | | | | | | | |
| 20 | | | | | | | | |
| 21 | | | | | | | | |
| 22 | | | | | | | | |

Job Plan | Job Plan to Assets | **PM Schedule** | Buildings | Workgroup | BuildingEquipment | Insp ...

Ready — 110%