



Preventive Maintenance

# **ADD A NEW PROCEDURE**



## ADD A NEW PROCEDURE

### DOCUMENT SUMMARY

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This job guide provides step-by-step instruction for adding new Inspection Procedure in Facilities Connect.

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

### VERSION INFORMATION (THIS DOCUMENT)

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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

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	Version	Release Date	Action	Owner
Most Recent →	1.1	03/04/2022	Updated	NU Facilities
	1.0	07/01/2021	Created	NU Facilities
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	--	--	--	--
	--	--	--	--



GETTING STARTED

- To begin, access the **Facilities Connect Home Screen**
- In order to create **Inspection Procedures** as outlined in this job guide, the user **must**:
  - Possess the **Asset Manager** role and responsibilities

PROCESS

Northwestern | FACILITIES CONNECT

Home

Reminders - Tasks

My Active Tasks

Task ID	Task Name	Task Description	Task Type	Request Class	Task Priority	Building Name
WT-1058356	COVID WASTEWATER MANAGMENT FY21 FACILITIES COVID CHARTSTRING APPROVED PER SCHAPS...	Hello Mary Pat, Please can a Facilities Connect Work Task be created for non-ca...	Planned	COVID-19	Important	\Loc Carr
WT-1065572	WT-1065572 - Scheduled Work, 2020 Ridge, PM Corrective Maintenance	test :	Corrective	PM Corrective Maintenance	Scheduled Work	2020 Ridge \Loc Carr

Manage Tasks

My Task History

My Organization's Active Tasks

Task ID	Task Name	Request ID	Request Class	Priority	Requested By	Build
WT-1044613	WT-1044613 - Medium, Ryan Hall, General Repairs & Maintenance		General Repairs & Maintenance	Medium		Ryan Hal

Job Cost Facilities Reports

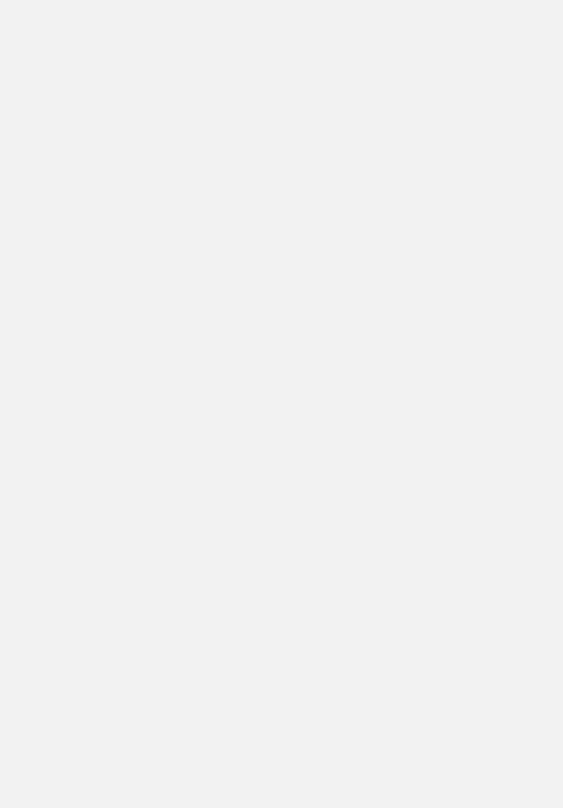
Job Cost User Reports

O&M Reports



PROCESS

1) To begin working with Procedures, click on the Maintenance tab in the hamburger menu on the left side of the Facilities Connect Home Screen



INFORMATION

Northwestern | FACILITIES CONNECT

Home

Reminders - Tasks

My Active Tasks

Task ID	Task Name	Task Description	Task Type	Request Class	Task Prior
WT-1058356	COVID WASTEWATER MANAGMENT FY21 FACILITIES COVID CHARTSTRING APPROVED PER SCHAPS...	Hello Mary Pat, Please can a Facilities Connect Work Task be created for non-ca...	Planned	COVID-19	Import
WT-1065572	WT-1065572 - Scheduled Work, 2020 Ridge, PM Corrective Maintenance	test :	Corrective	PM Corrective Maintenance	Schedu Work

My Task History

No data to display.

My Organization's Active Tasks

Task ID	Task Name	Request ID	Request Class	Priority	Req
WT-1044613	WT-1044613 - Medium, Ryan Hall, General Repairs & Maintenance		General Repairs & Maintenance	Medium	

My Bookmarks

- Job Cost Facilities...
- Job Cost User Rep...
- O&M Reports



▼ PROCESS

- 2) Locate the **Procedures** section.
- 3) Click on the **Inspection** option.

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

▶ INFORMATION

The screenshot shows the 'Northwestern | FACILITIES CONNECT' interface. The main header is purple with a home icon, a search icon, and user profile icons. Below the header, the 'Maintenance' section is active. A navigation bar contains 'Operations and Maintenance Reports' and 'Procedures'. Under 'Procedures', there are sub-items: 'Building Equipment without LOTO', 'Inspection', 'Procedures', and 'Work'. An orange box labeled '2' highlights the 'Procedures' header, and another orange box labeled '3' highlights the 'Inspection' sub-item. On the right side of the interface, there are 'Add to Bookmarks' and 'My Bookmarks' options.



PROCESS

4) Click on the Add button.  
  
<<Upon clicking, a new Inspection Procedure screen will open in a new window>>

INFORMATION

Northwestern FACILITIES CONNECT

Inspection

Add to Bookmarks My Bookmarks

4 Add

Inspection Procedures

Apply Filters Clear Filters

<input type="checkbox"/>	ID	Name	Status	Is Environmental Procedure
<input type="checkbox"/>	Contains	Contains	Contains	Contains
<input type="checkbox"/>	1000010	ATS - ASCO-Annual Evan's Edits	Active	<input type="checkbox"/>
<input type="checkbox"/>	1000011	ATS-Monthly	Revision In Progress	<input type="checkbox"/>
<input type="checkbox"/>	1000012	ATS-Annual	Active	<input type="checkbox"/>
<input type="checkbox"/>	1000013	Caterpillar 351-Daily	Active	<input type="checkbox"/>
<input type="checkbox"/>	1000019	Electrical Disconnect-Annual	Active	<input type="checkbox"/>
<input type="checkbox"/>	1000020	Electrical Panel-Annual	Active	<input type="checkbox"/>
<input type="checkbox"/>	1000021	Emergency Generator-Weekly	Active	<input type="checkbox"/>
<input type="checkbox"/>	1000025	Emergency Generator-Annual Load Bank T...	Active	<input type="checkbox"/>
<input type="checkbox"/>	1000026	UPS-Annual	Active	<input type="checkbox"/>

Items per page: 50 1 - 50 of 487 items 1 of 10 pages



PROCESS

To complete the **Inspection Procedure**, provide the following information:

Start on the **General** tab.

5) General section:

a) **Name** – name convention follows:

1. The **Type** of the asset the procedure will be attached to.
2. The **Manufacturer** of the asset.
3. The **Frequency** of the procedure.

b) **Procedure Active From** – the start date of the procedure, or current date.

c) **Procedure Active To** – the expiration or end date of the procedure. Put this date very far in the future to avoid

INFORMATION

Inspection Procedure: Add To Bookmarks Print Help Create Draft x

**General** Notifications Notes & Documents

(Required): Define a Inspection procedure.

**General**

ID	Status
<p>5a <b>* Name</b> <input type="text"/></p> <p>Description <input type="text"/></p>	

5b **Procedure Active From**  25 x

5c **Procedure Active To**  25 x

Response Required  Is Environmental Procedure

**Details**

A. Total Estimated Procedure Duration 0

B. Total Estimated Procedure Step Cost \$ .00 US Dollars

C. Total Estimated Material Cost \$ .00 US Dollars

D. Total Estimated Work Plan Cost (B+C) \$ .00 US Dollars

Procedure Steps Materials Equipment Qualifications Related Documents

**Procedure Steps** Add

0 total found

Step Number	Name	Qualification	Labor Class	Estimated Duration	Hours
No data to display					
					0

Specifications Assets Locations Tasks Building System Class Building Systems PM Schedules

**Specifications**



PROCESS

6) Next add the individual Procedure Steps:

a) Click the Quick Add button.

<<Upon clicking, the Procedure Steps fields will open below >>

b) Step # – number your steps by 10 (ex. 10, 20, 30). This will allow you to make additional steps if necessary.

c) Name – put as much information regarding the step in the name. If you max out the character limit, make an additional step and number accordingly.

d) Quick Add – after you have entered all the necessary information, click the Quick Add button to save the step.

IMPORTANT

Complete step 6a-d for each step of the Procedure.

Inspection Procedure: Add To Bookmarks Print Help Create Draft x

**General** Notifications Notes & Documents

**Details**

A. Total Estimated Procedure Duration 0 Procedure Rule  per Asset  per Location  per Task

B. Total Estimated Procedure Step Cost \$0.00 US Dollars

C. Total Estimated Material Cost \$0.00 US Dollars

D. Total Estimated Work Plan Cost (B+C) \$0.00 US Dollars

Procedure Steps Materials Equipment Qualifications Related Documents

**Procedure Steps** 1 total found Quick Add

<input type="checkbox"/>	! Step Number	Name	Qualification	Labor Class	Estimated Duration	Hours	Required?
<input type="checkbox"/>					0	0 hours	<input type="checkbox"/>

Specifications Assets Locations Tasks Building System Class Building Systems PM Schedules

**Specifications** Apply Filters Clear Filters Refresh Star

<input type="checkbox"/>	! Image	ID	Spec Name	Status
No data to display				

Items per page: 10 0 of 0 items 1 of 1 pages





PROCESS

Once you have entered all the necessary Procedure Steps,

7) Click the **Create Draft** button to save the Procedure as a draft.

INFORMATION

Inspection Procedure: Add To Bookmarks Print Help

**General** Notifications Notes & Documents 7 **Create Draft**

(Required): Define a Inspection procedure.

**General**

ID	Status
* Name: Widget - Acme - Monthly	
Description	

Procedure Active From: 06/21/2021 25 x Procedure Active To: 06/21/3021 25 x

Response Required  Is Environmental Procedure

**Details**

A. Total Estimated Procedure Duration 0

B. Total Estimated Procedure Step Cost \$ .00 US Dollars

C. Total Estimated Material Cost \$ .00 US Dollars

D. Total Estimated Work Plan Cost (B+C) \$ .00 US Dollars

Procedure Steps Materials Equipment Qualifications Related Documents

**Procedure Steps** Add

0 total found

Step Number	Name	Qualification	Labor Class	Estimated Duration	Hours
No data to display					
					0

Specifications Assets Locations Tasks Building System Class Building Systems PM Schedules



PROCESS

Once the Draft has been created,

- 8) Take note of the newly created ID number, if you are tracking the procedures in the Matrix.
- 9) Click on the **Activate** button to complete the new Inspection Procedure.

<<Upon clicking, the **Inspection Procedure** screen will close and you will return to the Portfolio window>>

INFORMATION

Inspection Procedure: 1000625-widget-acme-monthly

General Notifications Notes & Documents 9 **Activate** Save Save & Close More x

(Required): Define a Inspection procedure.

**General** 8 ID 1000625 Status Draft

\* Name widget-acme-monthly

Description

Procedure Active From 06/21/2021 25 x Procedure Active To 07/21/3021 25 x

Response Required  Is Environmental Procedure

**Details**

A. Total Estimated Procedure Duration 0

B. Total Estimated Procedure Step Cost \$.00 US Dollars

C. Total Estimated Material Cost \$.00 US Dollars

D. Total Estimated Work Plan Cost (B+C) \$.00 US Dollars

Procedure Steps Materials Equipment Qualifications Related Documents

**Procedure Steps** Add

0 total found

Step Number	Name	Qualification	Labor Class	Estimated Duration	Hours
No data to display					
					0

Specifications Assets Locations Tasks Building System Class Building Systems PM Schedules