

PREVENTIVE MAINTENANCE

JOB PLANS: AD HOC WORK TASKS

Provides guidance for adding ad hoc work tasks to an Active Job Plan on Facilities Connect desktop.

▼ GETTING STARTED

This guide begins on the Plan Work screen. For more information on navigating to the Plan Work screen, refer to the **Setting Up a New Job Plan** manual.

DIRECTIONS:

- From the Plan Work screen, locate the **Job Plan** that you want to edit:
 - Enter **key words** into the column search boxes.



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٥	Job	Plans		~	Job Plan Name		A	pply Filters Clear Filters 🕄	☆⊻
_ بر		1	Building ID	Building Name		Job Plan ID	Description	Primary Workgroup	Status
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ð		~	P100	Huron/St. Clair Pa	ark Huron-St. Claire Parking -	P10009		Zone 6 Electrician	Active
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		~	8836	Pancoe NSUHS Li	ife Locksmith-Pancoe NSUHS	S 1000407		Central Locksmith	Active
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		~	8795	Wieboldt Hall	Wieboldt Hall-Life Safety I	1000992		Zone 6 Electrician	Active



2a

Upon clicking, the Job Plan will open in a new window:

Click on **Revise** to edit the Job Plan.

Job Plan: 1	001428				Add To Book	marks	🔒 Print	0	Help
General	Notes & Documents		2 a	Revise	Save Save	e & Close	More		x
(Required):	Job Plan Details.								-
= Gen	eral								
	ID	879907	Status	Active					1
	\star Job Plan Name	Mcgaw/Olson - Life Safety Infrastructure SWO 2741							
	Description								
	* Building	\Locations\Chicago Campus\Mcgaw/Olson	Building Name	Mcgaw/Olson					
	Building ID	8799	Building Address	710 Fairbanks	Ct				
Assign N	ultiple Workgroups?								



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DIRECTIONS:

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Once the Job Plan is in the Revise stage:

Click on the PM Schedules sub-tab.

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General Notes & Doo	cuments			Activ	ate Save	Save & Close	e More	-
- General								
	ID 879907		Status Rev	vision In Progress				
\star Job Plan Nai	me Mcgaw/Olson - Life Safety I	nfrastructure SWO 2741						
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	ing \Locations\Chicago Campus	Mcgaw/Olson	🔎 🕄 🛛 Building Name MC					
	ID 8799		Building Address 710	0 Fairbanks Ct				
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A PM Sched	ules							
PM Sched	P			Apply Filter	rs Clear	r Filters	ት አ	Add
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PM Schedules PM Schedules C	s quency Contains NTHLY NTHLY	Contains Mcgaw/Olson - Life Safety Infras	Contains Schedule-Based	Recurrence in month(s) Equals	2 months 1 months	Status Contains Retired		⊻

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On the PM Schedule tab:

Click on the Add button.

				Add To Bookmarks	Print 🕜
General Notes & Documents			Activate	Save Save & Close	More
- General					
ID 879907		Status Revis	ion In Progress		
★ Job Plan Name Mcgaw/Olson - Life S	afety Infrastructure SWO 2741				
Description					
* Building \Locations\Chicago C	Campus\Mcgaw/Olson	🔎 🕄 🛛 Building Name Mcga			
Building ID 8799		Building Address 710 F	airbanks Ct		
Assign Multiple Workgroups?					
Primary Workgroup			Find	Clear Update Task	Assignment
Name Zone 6 Electrician					
Assets PM Schedules Tasks					
PM Schedules				4a	Add
 PM Schedules 			Apply Filters	4a Clear Filters	Add ਯ ≚
	Name	Туре	Apply Filters Recurrence in month(s)		
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DIRECTIONS:

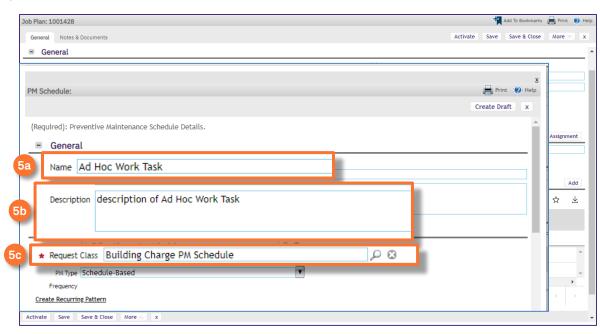
5

Upon clicking, the PM Schedule window will open. In the General section, complete the following information pertaining to the Work Task:

5a Name

5b Description

Request Class



Next, click on Create Recurring Patter.

PM Schedule		📇 Print 🕐
r in Schedule.		
		Create Draft
(Required):	Preventive Maintenance Schedule Details.	
,		
Gene	ral	
ID	Status	
Name	Ad Hoc Work Task	
Description	description of Ad Hoc Work Task	
Deta	l	
* Request Cla	Building Charge PM Schedule 🔎 😣	
Service Pl	an DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task	
PM Ty	pe Schedule-Based	
Create I	Recurring Pattern	
<u>create</u>	lecurring Pattern	
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DIRECTIONS:

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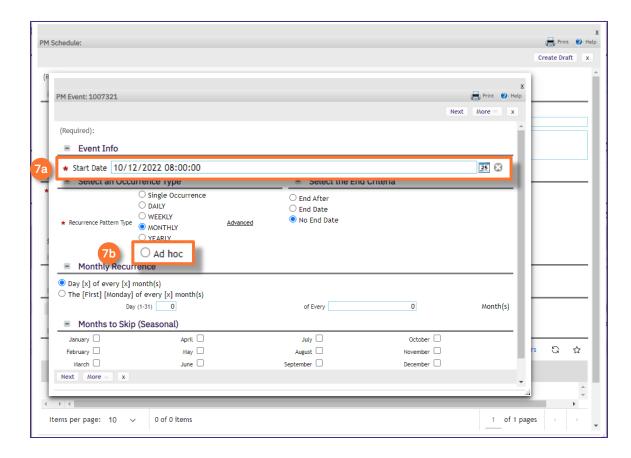
– Upon clicking, PM Event window will open:



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Enter the **Start Date** by using the **calendar** button.

Click on the Ad hoc radio button.





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DIRECTIONS:



If you need to add multiple Ad Hoc Work Tasks:

Utilize the Also Schedule On section to add multiple dates on which the same Ad Hoc Work Task will occur.

PM Event: 1007326			🖶 Print 😢 He
			Next More x
(Required):			
 Event Info 			
* Start Date 10/11/202	2 13:21:29		25
 Select an Occu 	rrence Type		
* Recurrence Pattern Type	 Single Occurrence DAILY WEEKLY MONTHLY YEARLY Ad hoc 	Advanced	
Also Schedule ()n		Add Remov
			Sav
0 total found			Show: 10
I Start Date			
lo data to display			
Save			

9

Once you have added all dates:

8

Click on the **Next** button.

PM Event: 1007326		9 Next ore x
(Required):		
 Event Info 		
* Start Date 10/11/2022 13:21:29		25 🕄
 Select an Occurrence Type 		
Single Occurrence DAILY WEEKLY MONTHLY YEARLY Ad hoc	Advanced	
Also Schedule On		Add Remove
		Save
© 0 total found		Show: 10 ¥
I Start Date		
Save 9		
Next		



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DIRECTIONS:



Next, click Complete.

					X
PM Event: 1007321				10 00	
					mplete
(Optional): .				_	
 Details 					
Offset Duration 0	25 🕄		(allowable + or - date overlap when	creating shadow o	ccurrences)
Select the Shadowing	PM Schedules			Find	Remove
			Apply Filters	Clear Filters	G ☆
! Frequency		Name	Servio	e Plan	
		No data to dis	splay		*
					۱.
Items per page: 110~	0 of 0 items			1 of 1 pages	< >
Complete					

▼ INFORMATION

Since this will more than likely be a single Work Task, no shadowing schedule should be needed.



Once back on the Job Plan window:

The new Work Task will appear on the PM Schedule list.

lob Plan: 1001	1428				Add To Bookmarks	Print	🕐 Hel
General N	Notes & Documents			Activate	Save Save & Close	More	x
(Required): Jo	ob Plan Details.						
- Gener	ral						
	ID 879907		Status Revi:	sion In Progress			
* 1	Job Plan Name Mcgaw/Olson - Life Safet	y Infrastructure SWO 2741					
	Description						
	* Building \Locations\Chicago Camp	us\Mcgaw/Olson	🔎 🕄 🛛 Building Name Mcga	aw/Olson			
	Building ID 8799		Building Address 710	Fairbanks Ct			
Assign Multipl	le Workgroups?						
 Prima 	ry Workgroup			Fin	d Clear Update	Task Assig	nment
Name Zone	e 6 Electrician						
Assets PI	M Schedules Tasks						
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L i	Frequency	Name	Туре	Recurrence in month(s)	Status		
_	Contains	Contains	Contains	Equals	Contains		
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	MONTHLY	Mcgaw/Olson - Life Safety Infrast	Schedule-Based	12 m	nonths Retired		
	MONTHLY	Mcgaw/Olson - Life Safety Infrast	Schedule-Based	1 m	nonths Active		
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Items per p	page: 10 🗸 1 - 3 of 3 items				1 of 1 pag	es 🕢	



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DIRECTIONS:



Finally, Save and Activate your Job Plan.

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General No	otes & Documents			12 Activate Save	Nore 💎
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	ID 879907		Status R	vision In Progress	
\star Jo	b Plan Name Mcgaw/Olson - Life	e Safety Infrastructure SWO 2741			
	Description				
	* Building \Locations\Chicage	o Campus\Mcgaw/Olson	🔎 🕄 🛛 Building Name M	cgaw/Olson	
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Assign Multiple	Workgroups?				
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