Preventive Maintenance

ADD MULTIPLE CHARTSTRINGS TO A NEW JOB PLAN

CREATE A NEW JOB PLAN

DOCUMENT SUMMARY

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

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

Please note that to add multiple chartstrings to a Job Plan, the Job Plan must be set up manually and a template cannot be used.

VERSION INFORMATION (THIS DOCUMENT)

Version	**1.0**	Release Date	**10/01/2022**
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).**		

REVISION HISTORY

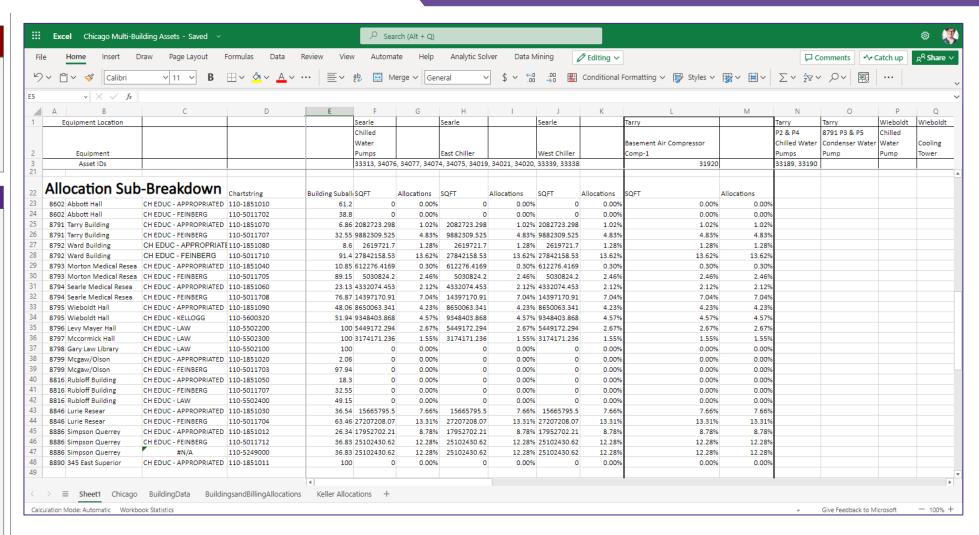|	Version	Release Date	Action	Owner
Most Recent →	1.0	10/01/2022	Created	NU Facilities
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▼ IMPORTANT

These instructions will mirror the training guide **Setting Up a New Job Plan Manually**.

The instructions change beginning at **step 10**.

▼ GETTING STARTED

- ❖ Before you begin on **Facilities Connect**, you will need to decide how the billing for tasks generated by the job plan you are issuing will be allocated. The spreadsheet at right is an example of billing allocations calculated for a particular task, listed by chartstring. Note that the total allocations need to add up to 100% for any given task

- ❖ In order to create **Job Plans** as outlined in this job guide, the user **must**:
  - a) Possess the **Asset Manager** role and responsibilities

Excel — Chicago Multi-Building Assets - Saved

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Equipment Location					Searle		Searle		Searle		Tarry		Tarry	Tarry	Wieboldt	Wieboldt
2		Equipment				Chilled Water Pumps		East Chiller		West Chiller		Basement Air Compressor Comp-1		P2 & P4 Chilled Water Pumps	8791 P3 & P5 Condenser Water Pump	Chilled Water Pump	Cooling Tower
3		Asset IDs				33313, 34076, 34077, 34074, 34075, 34019, 34021, 34020, 33339, 33338						31920		33189, 33190			
21																	
22	**Allocation Sub-Breakdown**		Chartstring		Building Suball	SQFT	Allocations	SQFT	Allocations	SQFT	Allocations	SQFT	Allocations				
23	8602	Abbott Hall	CH EDUC - APPROPRIATED	110-1851010	61.2	0	0.00%	0	0.00%	0	0.00%		0.00%	0.00%			
24	8602	Abbott Hall	CH EDUC - FEINBERG	110-5011702	38.8	0	0.00%	0	0.00%	0	0.00%		0.00%	0.00%			
25	8791	Tarry Building	CH EDUC - APPROPRIATED	110-1851070	6.86	2082723.298	1.02%	2082723.298	1.02%	2082723.298	1.02%		1.02%	1.02%			
26	8791	Tarry Building	CH EDUC - FEINBERG	110-5011707	32.55	9882309.525	4.83%	9882309.525	4.83%	9882309.525	4.83%		4.83%	4.83%			
27	8792	Ward Building	CH EDUC - APPROPRIATE	110-1851080	8.6	2619721.7	1.28%	2619721.7	1.28%	2619721.7	1.28%		1.28%	1.28%			
28	8792	Ward Building	CH EDUC - FEINBERG	110-5011710	91.4	27842158.53	13.62%	27842158.53	13.62%	27842158.53	13.62%		13.62%	13.62%			
29	8793	Morton Medical Resea	CH EDUC - APPROPRIATED	110-1851040	10.85	612276.4169	0.30%	612276.4169	0.30%	612276.4169	0.30%		0.30%	0.30%			
30	8793	Morton Medical Resea	CH EDUC - FEINBERG	110-5011705	89.15	5030824.2	2.46%	5030824.2	2.46%	5030824.2	2.46%		2.46%	2.46%			
31	8794	Searle Medical Resea	CH EDUC - APPROPRIATED	110-1851060	23.13	4332074.453	2.12%	4332074.453	2.12%	4332074.453	2.12%		2.12%	2.12%			
32	8794	Searle Medical Resea	CH EDUC - FEINBERG	110-5011708	76.87	14397170.91	7.04%	14397170.91	7.04%	14397170.91	7.04%		7.04%	7.04%			
33	8795	Wieboldt Hall	CH EDUC - APPROPRIATED	110-1851090	48.06	8650063.341	4.23%	8650063.341	4.23%	8650063.341	4.23%		4.23%	4.23%			
34	8795	Wieboldt Hall	CH EDUC - KELLOGG	110-5600320	51.94	9348403.868	4.57%	9348403.868	4.57%	9348403.868	4.57%		4.57%	4.57%			
35	8796	Levy Mayer Hall	CH EDUC - LAW	110-5502200	100	5449172.294	2.67%	5449172.294	2.67%	5449172.294	2.67%		2.67%	2.67%			
36	8797	Mccormick Hall	CH EDUC - LAW	110-5502300	100	3174171.236	1.55%	3174171.236	1.55%	3174171.236	1.55%		1.55%	1.55%			
37	8798	Gary Law Library	CH EDUC - LAW	110-5502100	100	0	0.00%	0	0.00%	0	0.00%		0.00%	0.00%			
38	8799	Mcgaw/Olson	CH EDUC - APPROPRIATED	110-1851020	2.06	0	0.00%	0	0.00%	0	0.00%		0.00%	0.00%			
39	8799	Mcgaw/Olson	CH EDUC - FEINBERG	110-5011703	97.94	0	0.00%	0	0.00%	0	0.00%		0.00%	0.00%			
40	8816	Rubloff Building	CH EDUC - APPROPRIATED	110-1851050	18.3	0	0.00%	0	0.00%	0	0.00%		0.00%	0.00%			
41	8816	Rubloff Building	CH EDUC - FEINBERG	110-5011707	32.55	0	0.00%	0	0.00%	0	0.00%		0.00%	0.00%			
42	8816	Rubloff Building	CH EDUC - LAW	110-5502400	49.15	0	0.00%	0	0.00%	0	0.00%		0.00%	0.00%			
43	8846	Lurie Resear	CH EDUC - APPROPRIATED	110-1851030	36.54	15665795.5	7.66%	15665795.5	7.66%	15665795.5	7.66%		7.66%	7.66%			
44	8846	Lurie Resear	CH EDUC - FEINBERG	110-5011704	63.46	27207208.07	13.31%	27207208.07	13.31%	27207208.07	13.31%		13.31%	13.31%			
45	8886	Simpson Querrey	CH EDUC - APPROPRIATED	110-1851012	26.34	17952702.21	8.78%	17952702.21	8.78%	17952702.21	8.78%		8.78%	8.78%			
46	8886	Simpson Querrey	CH EDUC - FEINBERG	110-5011712	36.83	25102430.62	12.28%	25102430.62	12.28%	25102430.62	12.28%		12.28%	12.28%			
47	8886	Simpson Querrey	#N/A	110-5249000	36.83	25102430.62	12.28%	25102430.62	12.28%	25102430.62	12.28%		12.28%	12.28%			
48	8890	345 East Superior	CH EDUC - APPROPRIATED	110-1851011	100	0	0.00%	0	0.00%	0	0.00%		0.00%	0.00%			
49																	

Sheet1 | Chicago | BuildingData | BuildingsandBillingAllocations | Keller Allocations | +

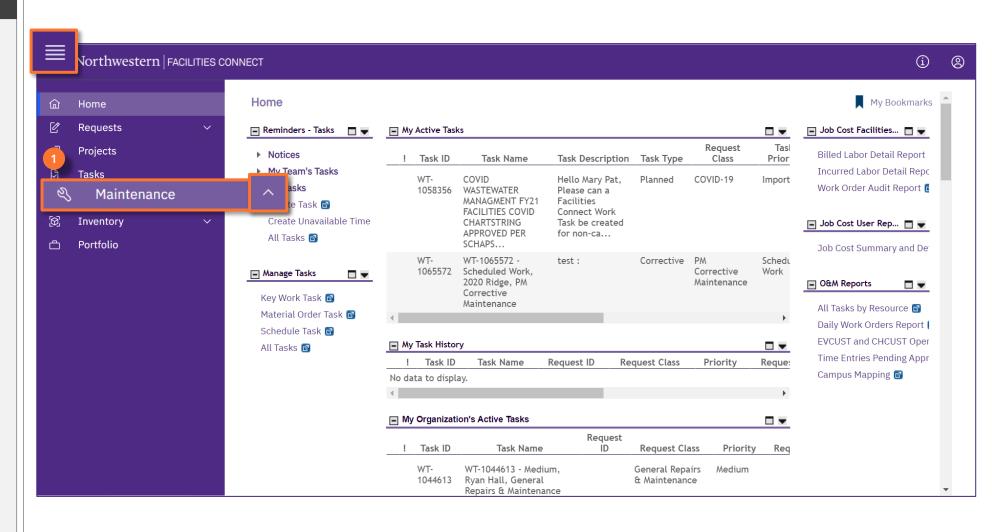Calculation Mode: Automatic | Workbook Statistics

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.

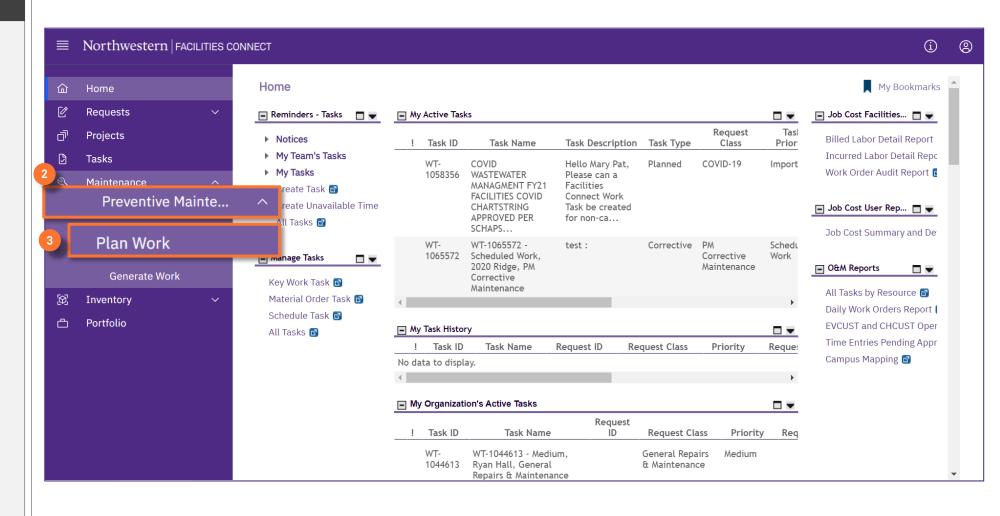Click on the drop now next to the **Maintenance** section in the hamburger menu of the **Facilities Connect Home Screen.**

▶ **INFORMATION**

Northwestern | FACILITIES CONNECT

Home
- Home
- Requests
- Projects
- Tasks
- **Maintenance**
- Inventory
- Portfolio

Home

Reminders - Tasks
- ▶ Notices
- ▶ My Team's Tasks
- ...asks
- ...e Task
- Create Unavailable Time
- All Tasks

Manage Tasks
- Key Work Task
- Material Order Task
- Schedule Task
- All 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

!	Task ID	Task Name	Request ID	Request Class	Priority	Reque:
	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...
- Billed Labor Detail Report
- Incurred Labor Detail Repc
- Work Order Audit Report

Job Cost User Rep...
- Job Cost Summary and De

O&M Reports
- All Tasks by Resource
- Daily Work Orders Report
- EVCUST and CHCUST Oper
- Time Entries Pending Appr
- Campus Mapping

NOW VIEWING | MAINTENANCE SCREEN

▼ PROCESS

2) Locate the **Preventive Maintenance** drop down menu.

3) Click on the **Plan Work** option.

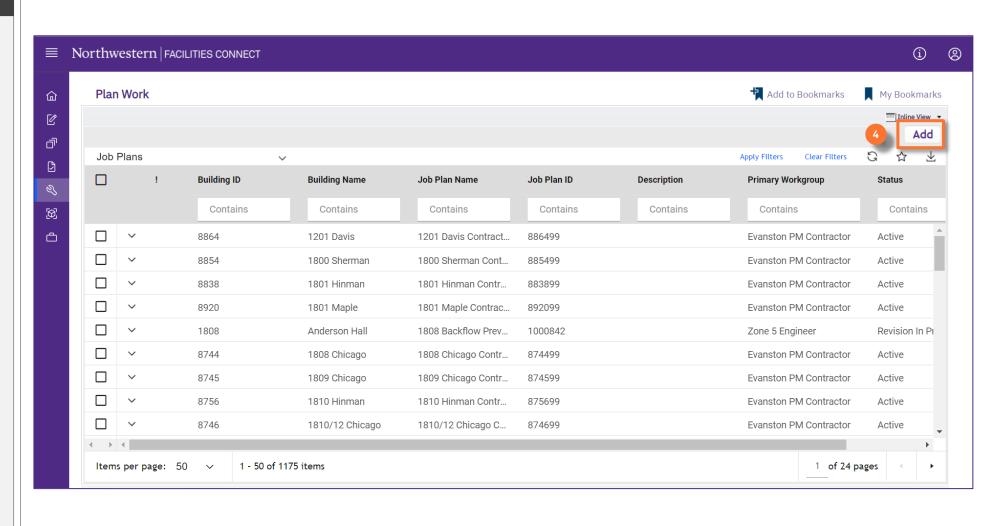*<<Upon clicking, the **Plan Work** screen will open in the main window>>*

▶ INFORMATION

Northwestern | FACILITIES CONNECT

Home

- Home
- Requests
- Projects
- Tasks
- **Maintenance**
  - **Preventive Mainte...**
  - **Plan Work**
  - Generate Work
- Inventory
- Portfolio

Reminders - Tasks
- ▶ Notices
- ▶ My Team's Tasks
- ▶ My Tasks
- reate Task
- reate Unavailable Time
- All Tasks

Manage Tasks
- Key Work Task
- Material Order Task
- Schedule Task
- All 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

!	Task ID	Task Name	Request ID	Request Class	Priority	Reque
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...
- Billed Labor Detail Report
- Incurred Labor Detail Repo
- Work Order Audit Report

Job Cost User Rep...
- Job Cost Summary and De

O&M Reports
- All Tasks by Resource
- Daily Work Orders Report
- EVCUST and CHCUST Oper
- Time Entries Pending Appr
- Campus Mapping

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>>*

▶ **INFORMATION**

Northwestern | FACILITIES CONNECT

Plan Work

Add to Bookmarks   My Bookmarks

Inline View ▼

4   Add

Job Plans ▼				Apply Filters	Clear Filters	
	!	**Building ID**	**Building Name**	**Job Plan Name**	**Job Plan ID**	**Description**	**Primary Workgroup**	**Status**
☐		Contains	Contains	Contains	Contains	Contains	Contains	Contains
☐	∨	8864	1201 Davis	1201 Davis Contract...	886499		Evanston PM Contractor	Active
☐	∨	8854	1800 Sherman	1800 Sherman Cont...	885499		Evanston PM Contractor	Active
☐	∨	8838	1801 Hinman	1801 Hinman Contr...	883899		Evanston PM Contractor	Active
☐	∨	8920	1801 Maple	1801 Maple Contrac...	892099		Evanston PM Contractor	Active
☐	∨	1808	Anderson Hall	1808 Backflow Prev...	1000842		Zone 5 Engineer	Revision In Pr
☐	∨	8744	1808 Chicago	1808 Chicago Contr...	874499		Evanston PM Contractor	Active
☐	∨	8745	1809 Chicago	1809 Chicago Contr...	874599		Evanston PM Contractor	Active
☐	∨	8756	1810 Hinman	1810 Hinman Contr...	875699		Evanston PM Contractor	Active
☐	∨	8746	1810/12 Chicago	1810/12 Chicago C...	874699		Evanston PM Contractor	Active

Items per page: 50 ▼   1 - 50 of 1175 items   1 of 24 pages

NOW VIEWING   JOB PLAN SCREEN

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.

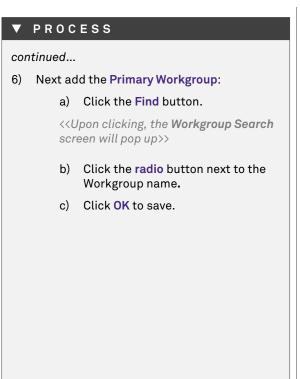b) **Building** – enter the **Building Number** or use the **magnifying glass** to locate the building.

▶ INFORMATION

PM Building and Category master list:

- **Building Name** – column E

- **Asset/Category** – column B
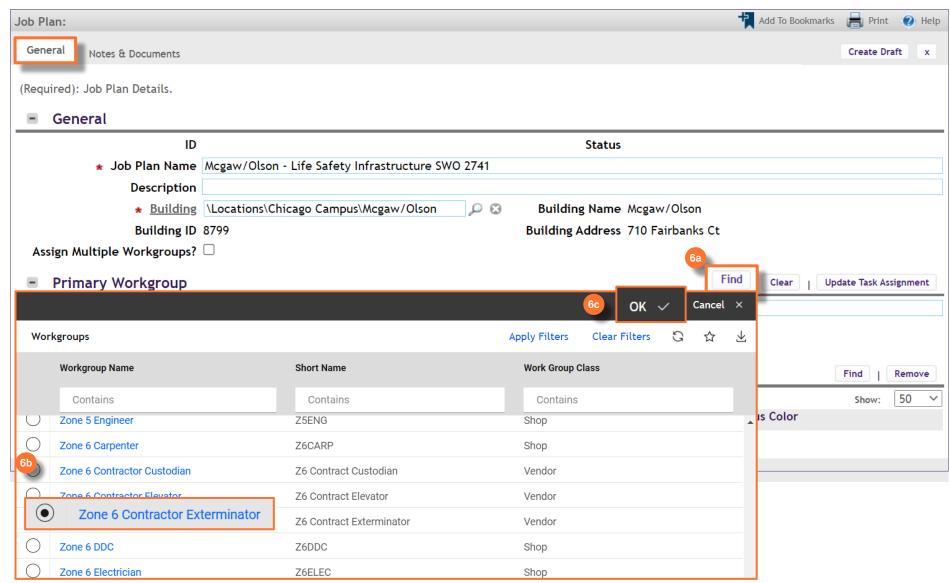
- **SWO** – columns R-U

- **Building Number** – column C

Job Plan:

Add To Bookmarks   Print   Help

General   Notes & Documents   Create Draft   x

(Required): Job Plan Details.

▬ General

ID   Status

5a ★ Job Plan Name

Description

5b ★ Building   🔍 ⊗   ing Name
        ilding ID   ing Address

Assign Multiple Workgroups? ☐

▬ Primary Workgroup   Find | Clear | Update Task Assignment

Name

Assets   PM Schedules   Tasks

▬ Assets   Find | Remove

🔄 0 total found   Show: 50 ▼

☐ ! Image   ID   Asset Name   Status   Status Color

No data to display

Create Draft   x

PROCESS

continued...

6) Next add the **Primary Workgroup**:

   a) Click the **Find** button.

   *<<Upon clicking, the **Workgroup Search** screen will pop up>>*

   b) Click the **radio** button next to the Workgroup name**.**

   c) Click **OK** to save.

INFORMATION

PM Building and Category master list:

- **Zone** – column F
- **Shop** – column G

Job Plan:

Add To Bookmarks   Print   Help

General | Notes & Documents

Create Draft   x

(Required): Job Plan Details.

General

ID	Status

* 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 Multiple Workgroups? ☐

Primary Workgroup

6a Find   Clear | Update Task Assignment

6c OK ✓   Cancel ✕

Workgroups   Apply Filters   Clear Filters   ⟳ ☆ ⤓

Workgroup Name	Short Name	Work Group Class
Contains	Contains	Contains
○ Zone 5 Engineer	Z5ENG	Shop
○ Zone 6 Carpenter	Z6CARP	Shop
6b ○ Zone 6 Contractor Custodian	Z6 Contract Custodian	Vendor
○ Zone 6 Contractor Elevator	Z6 Contract Elevator	Vendor
⦿ Zone 6 Contractor Exterminator	Z6 Contract Exterminator	Vendor
○ Zone 6 DDC	Z6DDC	Shop
○ Zone 6 Electrician	Z6ELEC	Shop

Find | Remove

Show: 50 ▾

s Color

PROCESS

continued...

On the **Assets** sub-tab,

7)   Add the **Asset(s)**:

a)   Click the **Find** button.

*<<Upon clicking, the **Asset Search** screen will pop up>>*

▶ INFORMATION

PM Building and Category master list:

- **Asset ID** – column H

Job Plan: 🔖 Add To Bookmarks   🖨 Print   ❓ Help

General   Notes & Documents   Create Draft   x

(Required): Job Plan Details.

➖ **General**

ID		Status
★ 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 Multiple Workgroups? ☐

➖ **Primary Workgroup**   Find | Clear | Update Task Assignment

Name   Zone 6 Contractor Exterminator

Assets   Schedules   Tasks

➖ **Assets**   **7a**   Find | Remove

🔄 0 total found   Show: 50 ▾

☐	! Image	ID	Asset Name	Status	Status Color

No data to display

Create Draft   x

PROCESS

continued...

On the **Assets** sub-tab,

7) Add the **Asset(s)**:

b) Enter the **Asset ID** number into the search column and hit enter.

c) Mark the **check box** next to the correct Asset.

d) Click **OK** to save.

INFORMATION

PM Building and Category master list:

▪ **Asset ID** – column H

Job Plan:

Add To Bookmarks | Print | Help

General | Notes & Documents | Create Draft | x

(Required): Job Plan Details.

Assets | PM Schedules | Tasks

— **Assets** | Find | Remove

Asset Records | Apply Filters | Clear Filters

☐	Image	Name	Asset ID	Specification Name	Spec Class	Brand	Primary Location
		Contains	35454	Contains	Contain	Cont	Contains
☑		Emergency ...	35454	Emergency Breaker Panel	ELECTRICAL		\Locations\Chicago Campus\

7d OK ✓ | Cancel ✕

Show: 50

Items per page: 50 ⌄ | 1 - 1 of 1 items | 1 of 1 pages

PROCESS

continued...

On the **PM Schedules** sub-tab,

8)   Add the **PM Schedule**:

    a)   Click the **Add** button.

      *<<Upon clicking, the **PM Schedule** screen will pop up>>*

INFORMATION

PM Building and Category master list:

- **Procedure Title** – column I
- **Frequency** – columns J-O

Job Plan:

Add To Bookmarks   Print   Help

General   Notes & Documents   Create Draft   x

(Required): Job Plan Details.

General

ID		Status
★ 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 Multiple Workgroups? ☐

Primary Workgroup

Find | Clear | Update Task Assignment

Name	Zone 6 Contractor Exterminator

Assets   **PM Schedules**   Tasks

PM Schedules

8a   Add

0 total found   Show: 50 ▾

☐	! Frequency	Name	Type	Recurrence in month(s)	Status

No data to display

Create Draft   x

▼ PROCESS

continued…

On the **PM Schedules** sub-tab,

8)   Add the **PM Schedule**:

b)   Enter the name of the PM Schedule: **Building name – Asset – Frequency**

c)   Click **Create Recurring Pattern** to enter date information.

*<<Upon clicking, the **PM Event** screen will pop up>>*

▶ INFORMATION

PM Building and Category master list:

- **Procedure Title** – column I
- **Frequency** – columns J-O

Job Plan:

Add To Bookmarks   Print   Help

General   Notes & Documents

Create Draft   x

(Required): Job Plan Details.

Assets   **PM Schedules**   Tasks

Add

Show: 50

Status

PM Schedule:

x

Print   Help

Create Draft   x

(Required): Preventive Maintenance Schedule Details.

☐ General

ID		Status
8b Name		
Description		

☐ Detail

* Request Class   Building Charge PM Schedule   🔍 ⊗

Service Plan   DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

PM Type   Schedule-Based   ▼

8c   Frequency

Create Recurring Pattern

☐ Billing Type

NOW VIEWING   JOB PLAN SCREEN
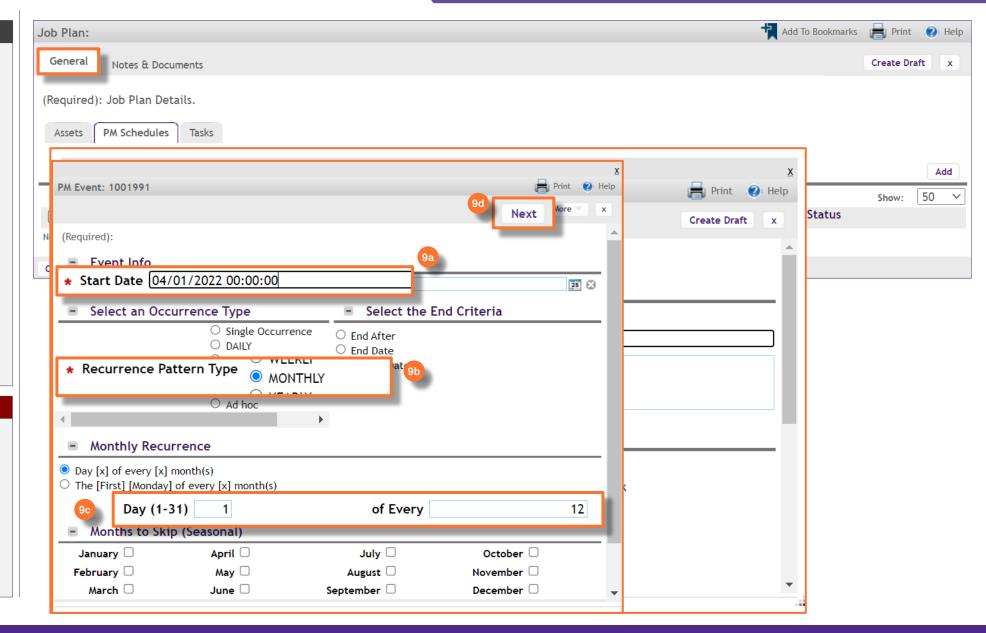
▼ PROCESS

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.

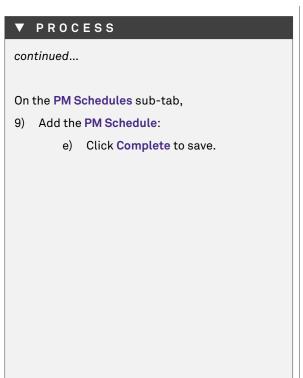## ▼ IMPORTANT

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.

Job Plan: Add To Bookmarks   Print   ? Help

General   Notes & Documents   Create Draft   x

(Required): Job Plan Details.

Assets   **PM Schedules**   Tasks   Add

PM Event: 1001991   Print   ? Help   Print   ? Help

9d **Next** More ▼ x   Create Draft   x

Show: 50 ▼

Status

(Required):

─ Event Info

9a

★ Start Date 04/01/2022 00:00:00   25 ⊗

─ Select an Occurrence Type   **─ Select the End Criteria**

  ○ Single Occurrence   ○ End After
  ○ DAILY   ○ End Date
  ○ WEEKLY   ○ ...date...   **9b**
★ **Recurrence Pattern Type** ● MONTHLY
                                 ○ YEARLY
  ○ Ad hoc

◄ ──────────────────────────── ►

─ Monthly Recurrence

● Day [x] of every [x] month(s)
○ The [First] [Monday] of every [x] month(s)

9c Day (1-31) [1   ]   of Every [12]

─ Months to Skip (Seasonal)

January ☐	April ☐	July ☐	October ☐
February ☐	May ☐	August ☐	November ☐
March ☐	June ☐	September ☐	December ☐

PROCESS

continued...

On the **PM Schedules** sub-tab,

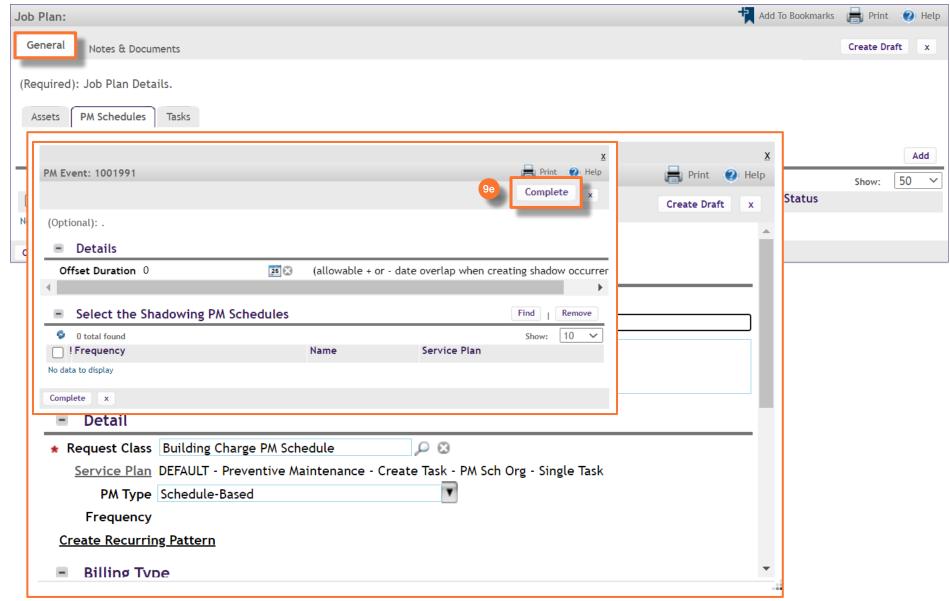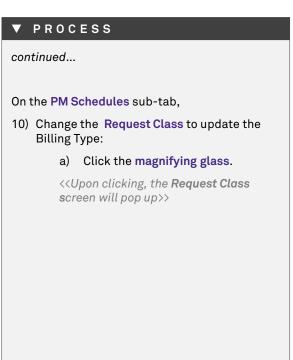9)   Add the **PM Schedule**:

   e)   Click **Complete** to save.

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.

Job Plan: Add To Bookmarks   Print   Help

General   Notes & Documents   Create Draft   x

(Required): Job Plan Details.

Assets   **PM Schedules**   Tasks

x

PM Event: 1001991   Print   Help   Add

9e   **Complete**   x   Create Draft   x   Show: 50

(Optional): .   Status

➖ **Details**

Offset Duration   0   [25] ⊗   (allowable + or - date overlap when creating shadow occurren

➖ **Select the Shadowing PM Schedules**   Find | Remove

   🔄 0 total found   Show: 10

   ☐ ! Frequency   Name   Service Plan

   No data to display

   Complete   x

➖ **Detail**

   ✱ Request Class   Building Charge PM Schedule   🔍 ⊗

      Service Plan   DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

      PM Type   Schedule-Based ▾

      Frequency

   Create Recurring Pattern

➖ **Billing Type**

NOW VIEWING   JOB PLAN SCREEN

▼ PROCESS

continued...

On the **PM Schedules** sub-tab,

10) Change the **Request Class** to update the Billing Type:

  a) Click the **magnifying glass**.

  <<Upon clicking, the Request Class screen will pop up>>

▶ INFORMATION

Billing Type and **Chartstring allocation** information can be found on the campus specific **Multi-Buildings Assets** master list provided by the Reliability Engineer.

Job Plan:

✚ Add To Bookmarks   🖨 Print   ❓ Help

| General | Notes & Documents |

Create Draft   x

(Required): Job Plan Details.

| Assets | PM Schedules | Tasks |

Add

PM Schedule:

🖨 Print   ❓ Help

Create Draft   x

Show: | 50 ▾ |

Status

(Required): Preventive Maintenance Schedule Details.

─ General

| ID | Status |

Name [   ]

Description [   ]

─ Detail

10a ✱ **Request Class** [Building Charge PM Schedule] 🔍 ⊗

Service Plan   DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

PM Type [Schedule-Based ▾]

Frequency

Create Recurring Pattern

─ Billing Type

▼ PROCESS

continued...

On the **PM Schedules** sub-tab,

10) Change the **Request Class** to update the Billing Type:

    b) Select the **Intra-FM Charge** option.

    c) Click **OK** to save.

▼ IMPORTANT

Billing Type and **Chartstring allocation** information can be found on the campus specific **Multi-Buildings Assets** master list provided by the Reliability Engineer.

Job Plan:

Add To Bookmarks   Print   Help

General   Notes & Documents   Create Draft   x

(Required): Job Plan Details.

Assets   **PM Schedules**   Tasks

Add

PM Schedule:

Print   Help

Create Draft   x

Show: 50

10c   OK ✓   Cancel ✕

Status

Preventive Maintenance Req...   Apply Filters   Clear Filters   ⟳   ☆   ⬇

!	Name	Service Class	Hierarchy Path
	Contains	Contains	Contains
10b ○	Building Charge PM Schedule	Facilities	\Classifications\Request Class\Buildin
◉	Intra-FM Charge PM Schedule	Facilities	\Classifications\Request Class\Buildin
○	No Charge PM Schedule	Facilities	\Classifications\Request Class\Buildin
○	Non Building Charge PM Schedule	Facilities	\Classifications\Request Class\Buildin

Frequency

Create Recurring Pattern

— **Billing Type**

NOW VIEWING   JOB PLAN SCREEN

PROCESS

continued...

On the **PM Schedules** sub-tab,

10) Change the **Request Class** to update the Billing Type:

   d)   The Billing Type section will now show as **Intra-FM** .

11) Add a **Chartstring** to the PM Schedule:

   a)   Under the **PM Chart String(s)** section, click **Add**.

   <<Upon clicking, the Request Chart String screen will pop up>>
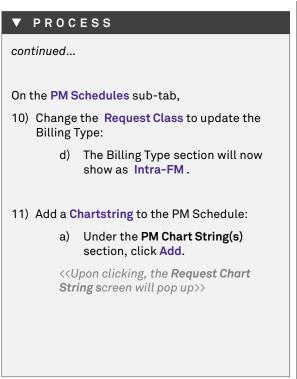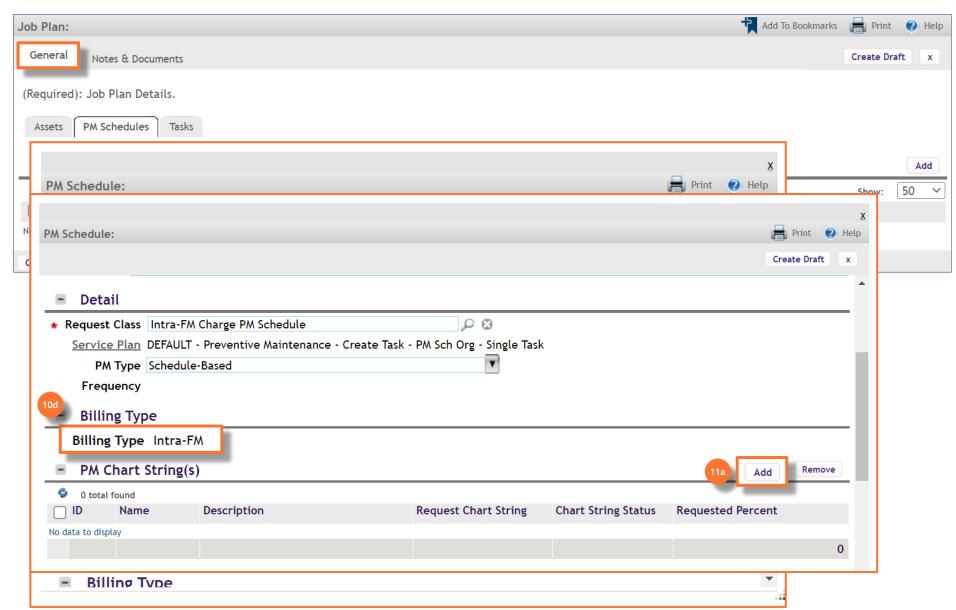
INFORMATION

Billing Type and **Chartstring allocation** information can be found on the campus specific **Multi-Buildings Assets** master list provided by the Reliability Engineer.

Job Plan:

Add To Bookmarks   Print   Help

General   Notes & Documents

Create Draft   x

(Required): Job Plan Details.

Assets   **PM Schedules**   Tasks

PM Schedule: x

Print   Help

Add

PM Schedule: x

Show: 50

PM Schedule: x

Print   Help

Create Draft   x

— Detail

★ Request Class   Intra-FM Charge PM Schedule

Service Plan   DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

PM Type   Schedule-Based

Frequency

10d

Billing Type

Billing Type   Intra-FM

— PM Chart String(s)   **11a**   Add   Remove

🔄 0 total found

	ID	Name	Description	Request Chart String	Chart String Status	Requested Percent
☐						
No data to display						
						0

— Billing Type

PROCESS

continued...

On the **PM Schedules** sub-tab,

11) Add a **Chartstring** to the PM Schedule:

  b)   Click on the **magnifying glass** next to **Request Chart String**.

  <<Upon clicking, the Chart String screen will pop up>>
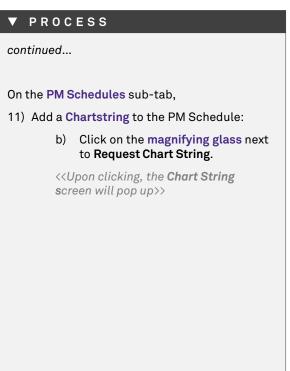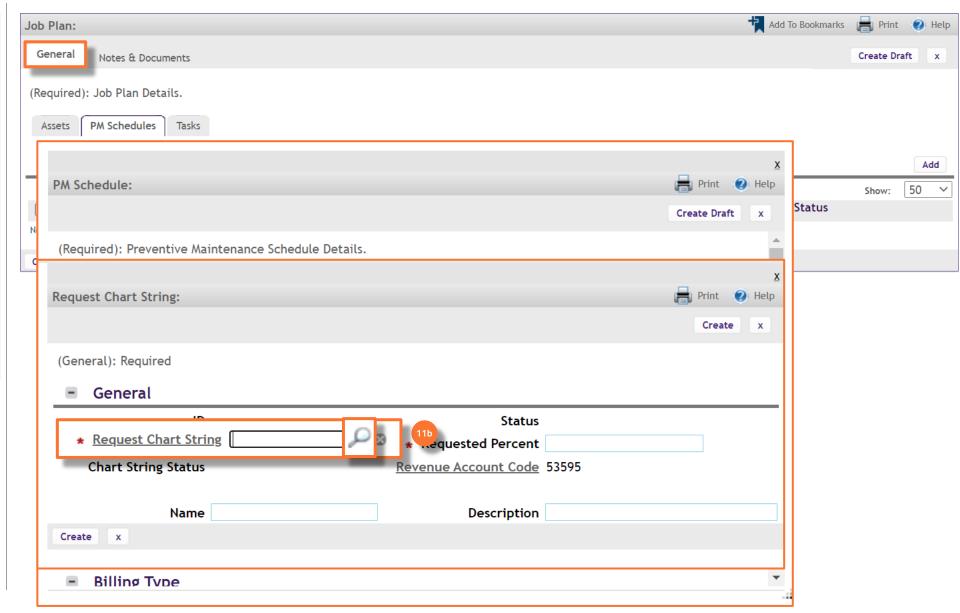
INFORMATION

Billing Type and **Chartstring allocation** information can be found on the campus specific **Multi-Buildings Assets** master list provided by the Reliability Engineer.

Job Plan:

Add To Bookmarks   Print   Help

General   Notes & Documents   Create Draft   x

(Required): Job Plan Details.

Assets   **PM Schedules**   Tasks

PM Schedule: Print   Help
                               Create Draft   x

(Required): Preventive Maintenance Schedule Details.

Add

Show: 50

Status

Request Chart String: Print   Help
                               Create   x

(General): Required

 – **General**

                    Status
* Request Chart String [   ] 🔍 ⊗   * Requested Percent [   ]   **11b**

Chart String Status   Revenue Account Code 53595

Name [   ]   Description [   ]

Create   x

 – **Billing Type**

▼ PROCESS

continued...

On the **PM Schedules** sub-tab,

11) Add a **Chartstring** to the PM Schedule:

    c) Click on the **radio** button next to the desired Chartstring.

    d) Click **OK** to save.

▶ INFORMATION

Billing Type and **Chartstring allocation** information can be found on the campus specific **Multi-Buildings Assets** master list provided by the Reliability Engineer.
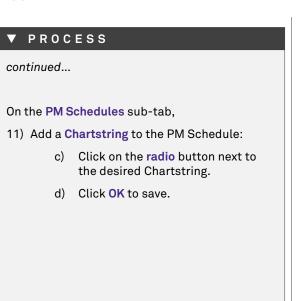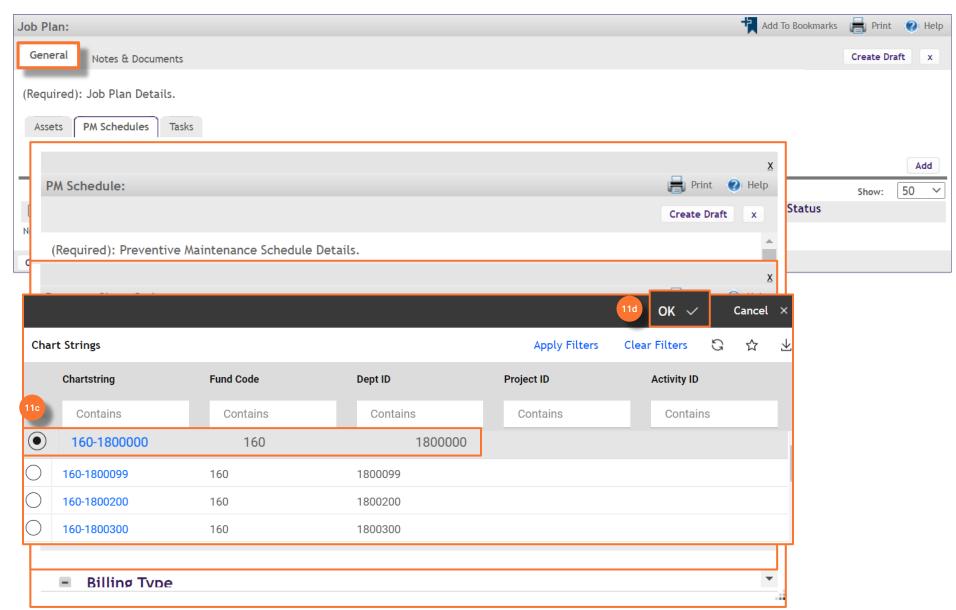
Job Plan:

Add To Bookmarks   Print   Help

General   Notes & Documents   Create Draft   x

(Required): Job Plan Details.

Assets   PM Schedules   Tasks

Add

PM Schedule: Print   Help

Create Draft   x

Show: 50

Status

(Required): Preventive Maintenance Schedule Details.

11d   OK ✓   Cancel ✕

Chart Strings   Apply Filters   Clear Filters

Chartstring	Fund Code	Dept ID	Project ID	Activity ID
Contains	Contains	Contains	Contains	Contains
⦿ 160-1800000	160	1800000		
○ 160-1800099	160	1800099		
○ 160-1800200	160	1800200		
○ 160-1800300	160	1800300		

11c

Billing Type

PROCESS

continued...

On the **PM Schedules** sub-tab,

11) Add a **Chartstring** to the PM Schedule:

    e)   Enter the **percentage** to be applied to the chartstring.

        If there are slight calculation errors due to rounding of percentages, adjust individual percentages until you reach 100%.

    f)   Click **Create** to save.

INFORMATION

Billing Type and **Chartstring allocation** information can be found on the campus specific **Multi-Buildings Assets** master list provided by the Reliability Engineer.

Job Plan:

Add To Bookmarks   Print   Help

General | Notes & Documents

Create Draft   x

(Required): Job Plan Details.

Assets | PM Schedules | Tasks

Add

PM Schedule:

Print   Help

Show: 50

Create Draft   x

Status

Request Chart String:

Print   Help

11f Create   x

(General): Required

General

ID		Status
★ Request Chart String	160-1800000 🔍 **11e**	★ Requested Percent	50
Chart String Status	Active	Revenue Account Code	53595

Name [ ]   Description [ ]

Create   x

Create Recurring Pattern

Billing Type

NOW VIEWING   JOB PLAN SCREEN

PROCESS

continued...

On the **PM Schedules** sub-tab,

11) Add a **Chartstring** to the PM Schedule:

  g) **REPEAT THIS STEP UNTIL ALL CHARTSTRINGS HAVE BEEN ENTERED**

INFORMATION

Billing Type and **Chartstring allocation** information can be found on the campus specific **Multi-Buildings Assets** master list provided by the Reliability Engineer.
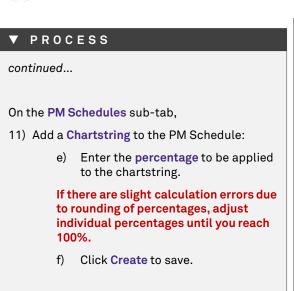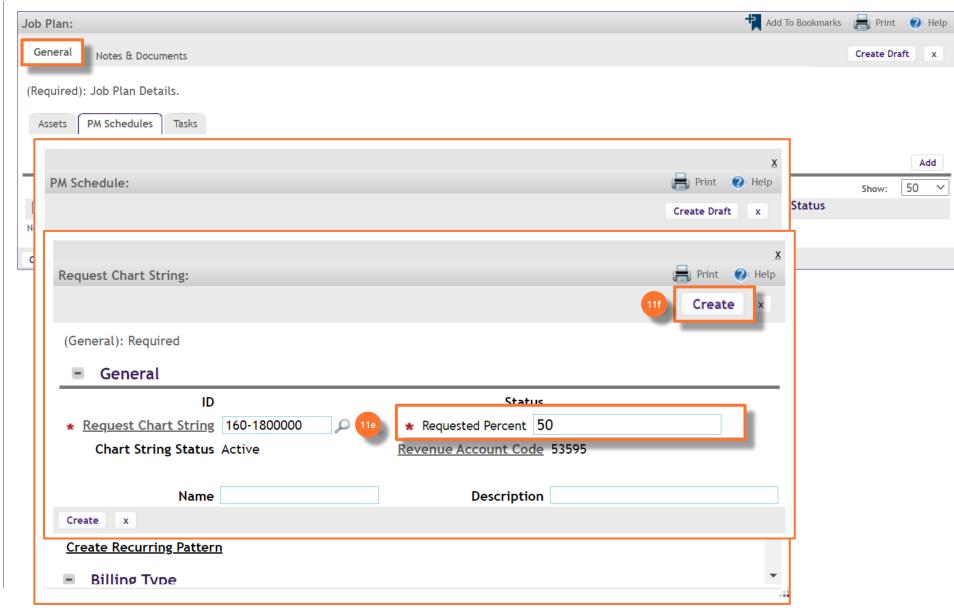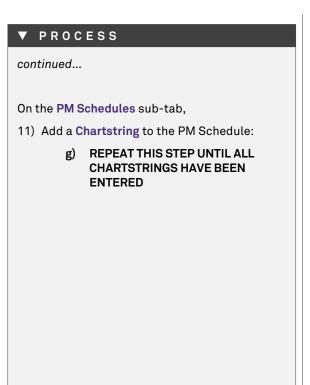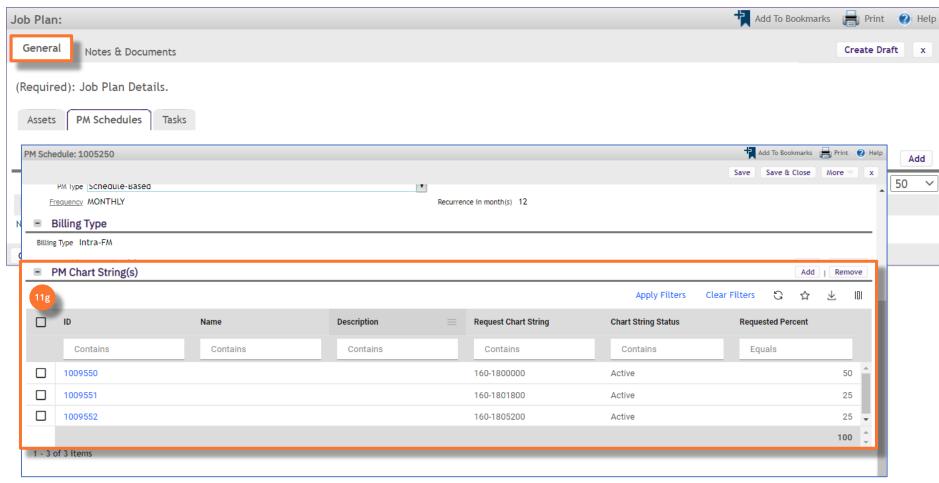

Job Plan: Add To Bookmarks   Print   Help

General   Notes & Documents   Create Draft   x

(Required): Job Plan Details.

Assets   **PM Schedules**   Tasks

PM Schedule: 1005250   Add To Bookmarks   Print   Help   Add

                                       Save   Save & Close   More   x   50

PM Type Schedule-Based

Frequency MONTHLY   Recurrence in month(s) 12

— **Billing Type**

Billing Type Intra-FM

— **PM Chart String(s)**   Add | Remove

11g   Apply Filters   Clear Filters

	ID	Name	Description	Request Chart String	Chart String Status	Requested Percent
☐	Contains	Contains	Contains	Contains	Contains	Equals
☐	1009550			160-1800000	Active	50
☐	1009551			160-1801800	Active	25
☐	1009552			160-1805200	Active	25
						100

1 - 3 of 3 items

NOW VIEWING   JOB PLAN SCREEN

continued...

On the **PM Schedules** sub-tab,

12) Once the chartstrings have been added,

    a)   Click **Create Draft.**

    b)   Click **Activate** to fully save the PM Schedule.

▶ INFORMATION

Job Plan:

Add To Bookmarks   Print   Help

General   Notes & Documents   Create Draft   x

(Required): Job Plan Details.

x

PM Schedule: Print   Help

12a   Create Draft   x   Add

ID		Status		50 ∨
Name	Mcgaw/Olson - Life Safety Infrastructure Annual			
Description				

x

PM Schedule: 1001953   Add To Bookmarks   Print   Help

12b   Activate   Save   Save & Close   More ▾   x

− General

ID	1001953	Status	Draft
Name	Mcgaw/Olson - Life Safety Infrastructure Annual		
Description			

NOW VIEWING   JOB PLAN SCREEN

PROCESS

continued...

On the **PM Schedules** sub-tab,

12) The PM Schedule will now appear on the Job Plan window.

Job Plan: 1001528

Add To Bookmarks   Print   Help

General   Notes & Documents

Activate   Save   Save & Close   More   x

(Required): Job Plan Details.

General

ID	1001528	**Status** Draft
★ Job Plan Name	Mcgaw/Olson - Life Safety Infrastructure SWO 2742	
Description		
★ Building	\Locations\Chicago Campus\Mcgaw/Olson	**Building Name** Mcgaw/Olson
Building ID	8799	**Building Address** 710 Fairbanks Ct

Assign Multiple Workgroups? ☐

Primary Workgroup

Find | Clear | Update Task Assignment

Name   Zone 6 Contractor Exterminator

Assets | PM Schedules | Tasks

PM Schedules

Add

Export   1 total found

Show: 50

!	Frequency	Name	Type	Recurrence in month(s)	Status
☐	MONTHLY	Mcgaw/Olson - Life Safety Infrastructure Annual	Schedule-Based	12 months	Active

Activate   Save   Save & Close   More   x

► INFORMATION

NOW VIEWING   JOB PLAN SCREEN

▼ **PROCESS**

continued...

On the **Tasks** sub-tab,

13) The individual Job Plan Work Tasks will populate.
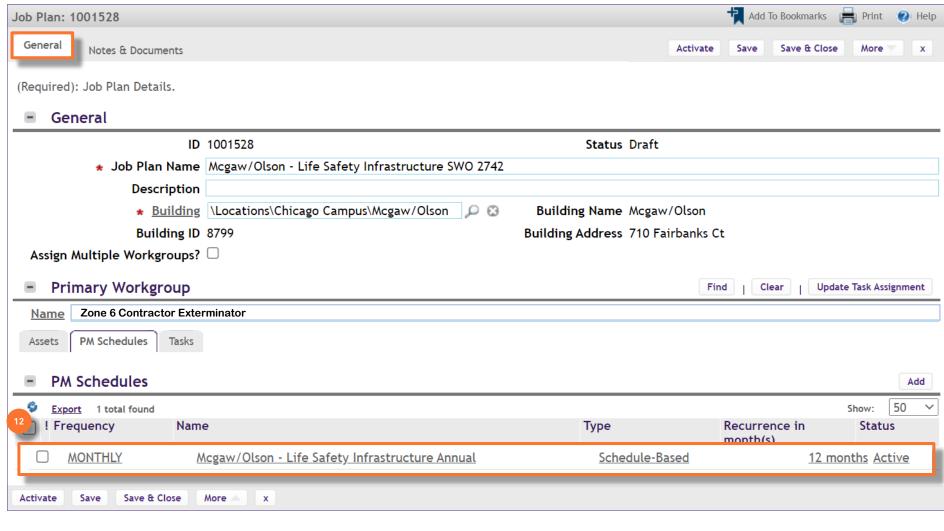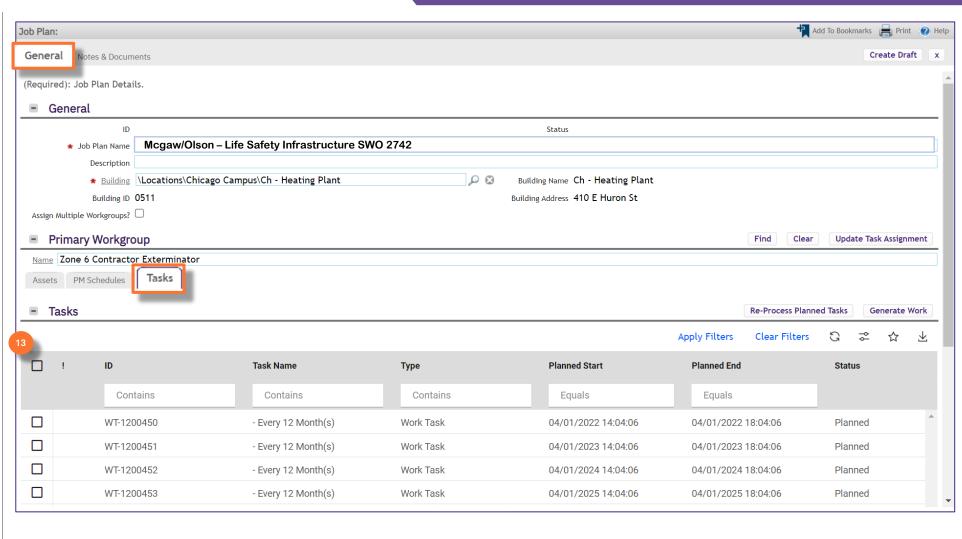
▶ **INFORMATION**

Job Plan:

🔖 Add To Bookmarks   🖨 Print   ❓ Help

General   Notes & Documents

Create Draft   x

(Required): Job Plan Details.

➖ General

| | ID | | Status |

⭐ Job Plan Name   **Mcgaw/Olson – Life Safety Infrastructure SWO 2742**

Description

⭐ Building   \Locations\Chicago Campus\Ch - Heating Plant   🔍 ❌   Building Name   Ch - Heating Plant

Building ID   0511   Building Address   410 E Huron St

Assign Multiple Workgroups? ☐

➖ Primary Workgroup   Find   Clear   Update Task Assignment

Name   Zone 6 Contractor Exterminator

Assets   PM Schedules   **Tasks**

➖ Tasks   Re-Process Planned Tasks   Generate Work

13   Apply Filters   Clear Filters   🔄 ⚙ ⭐ ⬇

☐	!	ID	Task Name	Type	Planned Start	Planned End	Status
		Contains	Contains	Contains	Equals	Equals	
☐		WT-1200450	- Every 12 Month(s)	Work Task	04/01/2022 14:04:06	04/01/2022 18:04:06	Planned
☐		WT-1200451	- Every 12 Month(s)	Work Task	04/01/2023 14:04:06	04/01/2023 18:04:06	Planned
☐		WT-1200452	- Every 12 Month(s)	Work Task	04/01/2024 14:04:06	04/01/2024 18:04:06	Planned
☐		WT-1200453	- Every 12 Month(s)	Work Task	04/01/2025 14:04:06	04/01/2025 18:04:06	Planned

PROCESS

continued...

Back on the **PM Schedules** sub-tab,

Repeat steps 8-12 to add the **MONTHLY PM Schedule**.

14) When you come to step 9:

   a)   Select the following month as the start date.

   b)   Do not change the Monthly Recurrence Pattern Type.

   c)   Enter the day of the month the task will occur, for every month.

   d)   Click **Next** to save.

▶ **INFORMATION**

Job Plan:

Add To Bookmarks   Print   Help

General   Notes & Documents   Create Draft   x

(Required): Job Plan Details.

Assets   **PM Schedules**   Tasks

Add

PM Event: 1001991   Print   Help   Print   Help

14d   Next   More   x   Create Draft   x   Show: 50

(Required):   Status

14a Event Info

★ Start Date   12/01/2021 12:00:00   25   ⊗

⊟ Select an Occurrence Type   ⊟ Select the End Criteria

14b   ○ Single Occurrence   ○ End After
                 ○ DAILY   ○ End Date
                 ○ WEEKLY   ...ate
★ Recurrence Pattern Type   ● MONTHLY
                 ○ YEARLY
                 ○ Ad hoc

◄   ►

⊟ Monthly Recurrence

● Day [x] of every [x] month(s)
○ The [First] [Monday] of every [x] month(s)

14c   Day (1-31)   1   of Every   1   Month(s)

⊟ Months to Skip (Seasonal)

January ☐   April ☐   July ☐   October ☐
February ☐   May ☐   August ☐   November ☐
March ☐   June ☐   September ☐   December ☐

PROCESS

continued...

On the **PM Schedules** sub-tab,

15) Add the ANNUAL PM Schedule as a **Shadow**:

    a) Click the **Find** button.

    <<Upon clicking, the PM Event screen will pop up>>

    b) Click the **check box** next to the Annual PM Schedule.

    c) Click **OK** to save.

▶ INFORMATION

Job Plan:

Add To Bookmarks   Print   Help

General   Notes & Documents

Create Draft   x

(Required): Job Plan Details.

Assets | **PM Schedules** | Tasks

Add

Show: 50

PM Event: 1001991

Print   Help

Complete   x

Print   Help

Create Draft   x

Status

(Optional): .

15a

− **Details**

Offset Duration 0   25 ⊗   (allowable + or - date overlap when creating shadow occurrence

− Select the Shadowing PM Schedules   **Find** Remove

15c

OK ✓   Cancel

PM Schedule - Query for Sha...   Add | Apply Filters | Clear Filters

☐	!	Name	ID	Description	Status
15b ☑		Mcgaw/Olson - Life Safety Infrastructure Annual	1001953		Active

− Billing Type

PROCESS

continued…

On the **PM Schedules** sub-tab,

15) Add the ANNUAL PM Schedule as a **Shadow**:

 d) Click the **Complete** button to save.

Job Plan:

Add To Bookmarks   Print   Help

General   Notes & Documents

Create Draft   x

(Required): Job Plan Details.

Assets   **PM Schedules**   Tasks

x   Add

x   Show: 50

PM Event: 1001996   Print   Help

15d   **Complete**   x

(Optional): .

 — **Details**

Offset Duration 0   [25] ⊗   (allowable + or - date overlap when creating shadow occurrences)

 — **Select the Shadowing PM Schedules**   Find | Remove

Export   1 total found   Show: 10

☐ ! Frequency   Name   Service Plan

☐ MONTHLY   Mcgaw/Olson - Life Safety Infrastructure Annual   DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

Complete   x

Request Class Building Charge PM Schedule

Service Plan DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

PM Type Schedule-Based ▼

Frequency

Create Recurring Pattern

 — **Billing Type**
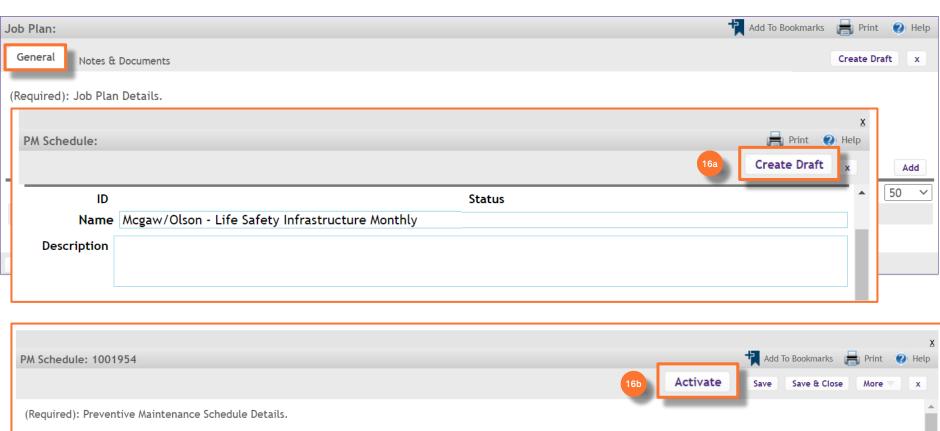
▶ **INFORMATION**

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

Job Plan:
 Add To Bookmarks   Print   Help

General   Notes & Documents
 Create Draft   x

(Required): Job Plan Details.

PM Schedule:
 Print   Help

16a   Create Draft   x   Add

ID		Status
Name	Mcgaw/Olson - Life Safety Infrastructure Monthly	
Description		

50 ▾

PM Schedule: 1001954
 Add To Bookmarks   Print   Help

16b   Activate   Save   Save & Close   More ▾   x

(Required): Preventive Maintenance Schedule Details.

— **General**

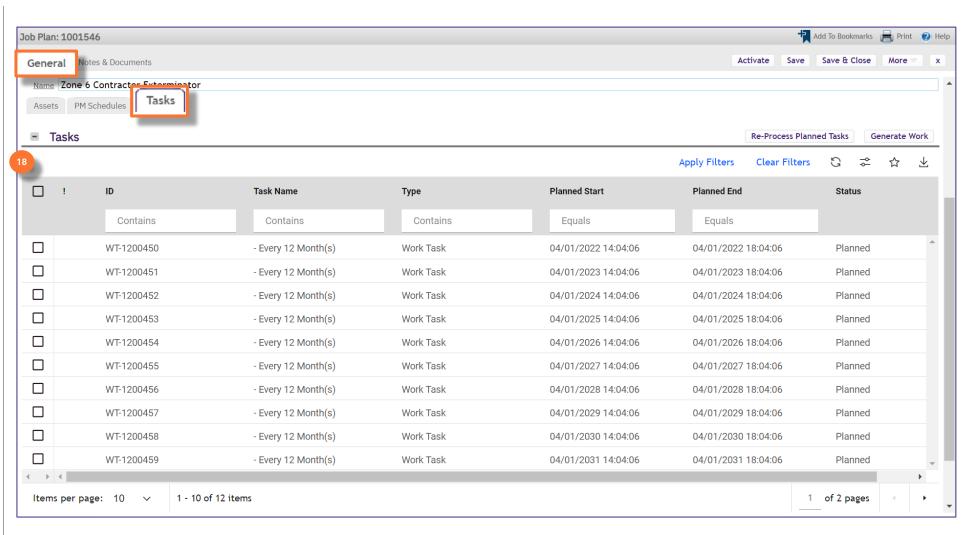| ID 1001954		Status Draft
Name	Mcgaw/Olson - Life Safety Infrastructure Monthly	
Description		

▼ 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.

► INFORMATION

Job Plan: 1001546

📑 Add To Bookmarks   🖨 Print   ❓ Help

General   Notes & Documents

Activate   Save   Save & Close   More ▾   x

(Required): Job Plan Details.

⊟ General

ID 1001546   Status Draft

★ Job Plan Name **Mcgaw/Olson – Life Safety Infrastructure SWO 2742**

Description

★ Building \Locations\Chicago Campus\Ch - Heating Plant 🔍 ⊗   Building Name Ch - Heating Plant

Building ID 0511   Building Address 410 E Huron St

Assign Multiple Workgroups? ☐

⊟ Primary Workgroup   Find   Clear   Update Task Assignment

Name Zone 6 Contractor Exterminator

Assets   PM Schedules   Tasks

⊟ PM Schedules   Add

Apply Filters   Clear Filters   🔄 ⭐ ⬇

☐	!	Frequency	Name	Type	Recurrence in month(s)	Status
		Contains	Contains	Contains	Equals	Contains
☐		MONTHLY	123	Schedule-Based	0 months	Draft
☐		MONTHLY		Schedule-Based	12 months	Active

Items per page: 10 ⌄   1 - 2 of 2 items   1 of 1 pages ◄ ►

▼ PROCESS

continued...

On the **Tasks** sub-tab,

18) ALL Job Plan Work Tasks will populate and appear.

▶ **INFORMATION**

Job Plan: 1001546

📑 Add To Bookmarks   🖨 Print   ❓ Help

General   Notes & Documents

Activate   Save   Save & Close   More   x

Name | Zone 6 Contractor Exterminator

Assets   PM Schedules   **Tasks**

➖ Tasks

Re-Process Planned Tasks   Generate Work

Apply Filters   Clear Filters   🔄 ⚙ ⭐ ⬇

	!	ID	Task Name	Type	Planned Start	Planned End	Status
☐		Contains	Contains	Contains	Equals	Equals	
☐		WT-1200450	- Every 12 Month(s)	Work Task	04/01/2022 14:04:06	04/01/2022 18:04:06	Planned
☐		WT-1200451	- Every 12 Month(s)	Work Task	04/01/2023 14:04:06	04/01/2023 18:04:06	Planned
☐		WT-1200452	- Every 12 Month(s)	Work Task	04/01/2024 14:04:06	04/01/2024 18:04:06	Planned
☐		WT-1200453	- Every 12 Month(s)	Work Task	04/01/2025 14:04:06	04/01/2025 18:04:06	Planned
☐		WT-1200454	- Every 12 Month(s)	Work Task	04/01/2026 14:04:06	04/01/2026 18:04:06	Planned
☐		WT-1200455	- Every 12 Month(s)	Work Task	04/01/2027 14:04:06	04/01/2027 18:04:06	Planned
☐		WT-1200456	- Every 12 Month(s)	Work Task	04/01/2028 14:04:06	04/01/2028 18:04:06	Planned
☐		WT-1200457	- Every 12 Month(s)	Work Task	04/01/2029 14:04:06	04/01/2029 18:04:06	Planned
☐		WT-1200458	- Every 12 Month(s)	Work Task	04/01/2030 14:04:06	04/01/2030 18:04:06	Planned
☐		WT-1200459	- Every 12 Month(s)	Work Task	04/01/2031 14:04:06	04/01/2031 18:04:06	Planned

Items per page: 10 ⌄   1 - 10 of 12 items

1   of 2 pages ◀ ▶

NOW VIEWING   JOB PLAN SCREEN

PROCESS

continued...

Once you have entered all information for the Job Plan,

19) Click **Activate**.

*<<Upon clicking, the **Job Plan** screen will CLOSE>>*

▶ **INFORMATION**

Job Plan: 1001546

🔖 Add To Bookmarks   🖨 Print   ❓ Help

General   Notes & Documents

(19) **Activate**   Save   Save & Close   More   x

(Required): Job Plan Details.

⊟ General

ID	1001546	Status	Draft
★ Job Plan Name	**Mcgaw/Olson – Life Safety Infrastructure SWO 2742**		
Description			
★ Building	\Locations\Chicago Campus\Ch - Heating Plant 🔍 ⊗	Building Name	Ch - Heating Plant
Building ID	0511	Building Address	410 E Huron St
Assign Multiple Workgroups?	☐		

⊟ Primary Workgroup

Find   Clear   Update Task Assignment

Name Zone 6 Contractor Exterminator

Assets   PM Schedules   Tasks

⊟ Assets

Find   Remove

⟳ Export 1 total found

Show: 50

☐	!	Image	ID	Asset Name	Status	Status Color	Parent Asset
☐		🖼	35454	Emergency Breaker Panel	Available	🟩	

(19) **Activate**   Save & Close   More   x

▼ PROCESS

20) You will now be able to search for the Active Job Plan on the **Plan Work** screen.

Northwestern | FACILITIES CONNECT

Plan Work

Add to Bookmarks   My Bookmarks

Popup View ▼

Add |

Job Plans   ▼   Apply Filters   Clear Filters

	Building ID	Building Name	Job Plan Name	Job Plan ID	Primary Workgroup	Status	Desc
	Contains	olson	Contains	Contains	Contains	Contains	C
☐	8799	Mcgaw/Olson	Mcgaw/Olson - 4th Floor Equipment Room AHU S-4-6B	879919	Zone 6 Engineer	Active	
☐	8799	Mcgaw/Olson	Mcgaw/Olson - AHU - INDOOR UNIT - FC-3	879920	Zone 6 Engineer	Active	
☐	8799	Mcgaw/Olson	Mcgaw/Olson - AHU - INDOOR UNIT - FC-4	879921	Zone 6 Engineer	Active	
☐	8799	Mcgaw/Olson	Mcgaw/Olson - Air Compressor	879922	Zone 6 Engineer	Active	
☐	8799	Mcgaw/Olson	Mcgaw/Olson - Basement Ahir Handling Unit - TRIO #2 AC	879923	Zone 6 Engineer	Active	
☐	8799	Mcgaw/Olson	Mcgaw/Olson - Basement Indoor Air Handling Unit #1	879924	Zone 6 Engineer	Active	
☐	8799	Mcgaw/Olson	Mcgaw/Olson - Basement Indoor Air Handling Unit #2	879925	Zone 6 Engineer	Active	
	8799	Mcgaw/Olson	Mcgaw/Olson - Life Safety Infrastructure SWO 2741	879907	Zone 6 Contractor Exterminator	Active	
☐	8799	Mcgaw/Olson	Mcgaw/Olson - Biohazard Exhaust Fan	879927	Zone 6 Engineer	Active	
☐	8799	Mcgaw/Olson	Mcgaw/Olson - Booster Pump	879928	Zone 6 Engineer	Active	
☐	8799	Mcgaw/Olson	Mcgaw/Olson - Building Distribution SWO 2675	879902	Zone 6 Electrician	Active	
☐	8799	Mcgaw/Olson	Mcgaw/Olson - Chilled Water Pump	879929	Zone 6 Engineer	Active	

Items per page: 50 ▼   1 - 50 of 89 items   1   of 2 pages