



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 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	11/15/2021	Created	NU Facilities
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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 **must**:
 - Possess the **Asset Manager** role and responsibilities

PM Buildings & Categories 3.1 Chicago - Excel

1	Identifier	Equipment	Bldg No.	Start Month	BUILDING NAME	Zone	Shop	Asset IDs	Procedure Title	Monthly	Quarterly	Semi-Annual
2	8602 Fire Door	Fire Door	8602	7	Abbott Hall	6	Zone 6 Carpenter	40380, 39988,	door_fire_standard			
3	8602 VAV Box	VAV Box	8602	7	Abbott Hall	6	Zone 6 DDC	34304, 39977,	vav_standard			
4	8602 ATS #1 SWO 3970	ATS	8602	5	Abbott Hall	6	Zone 6 Electrical	34310	ats_asco	M-1000011		
5	8602 ATS #2 SWO 3971	ATS	8602	5	Abbott Hall	6	Zone 6 Electrical		ats_asco	M-1000011		
6	8602 Building Distribution SWO 2666	Building Distribution, Breaker	8602	7	Abbott Hall	6	Zone 6 Electrical	34312, 33793,	xbuilding_distribution	M-1000600		
7	8602 Fire Alarm Maintenance and Testing SWO 3918	Fire Alarm Control Panel	8602	7	Abbott Hall	6	Zone 6 Electrical		fire_alarm_control_panel_stand	M-1000647		
8	8602 Generator Testing #1 Abbott IT SWO 1774	Emergency Generator	8602	3	Abbott Hall	6	Zone 6 Electrical		emergency_generator_standar	M-1000533		
9	8602 Generator Testing #2 Abbott SWO 1775	Emergency Generator	8602	3	Abbott Hall	6	Zone 6 Electrical		emergency_generator_standar	M-1000533		
10	8602 GFI Testing SWO 4023	GFI Testing	8602	7	Abbott Hall	6	Zone 6 Electrical		XGFI	M-1000608		
11	8602 Grounding Maintenance WO623701	Grounding Maintenance	8602	1	Abbott Hall	6	Zone 6 Electrical		xgrounding_maintenance			
12	8602 Infrared Inspection WO605804	Infrared Inspection (switchbo	8602	10	Abbott Hall	6	Zone 6 Electrical		xinfrared_inspection			
13	8602 KWH Meter Maintenance SWO 2766	Electrical Meter	8602	7	Abbott Hall	6	Zone 6 Electrical		Meter>Loading	M-1000643		
14	8602 Life Safety Infrastructure SWO 2739	Life Safety Infrastructure, Em	8602	7	Abbott Hall	6	Zone 6 Electrical	39924, 39926,	xlife_safety_infrastructure	M-1000617		
15	8602 Switchboard Room Inspection SWO 0204	Switchboard	8602	7	Abbott Hall	6	Zone 6 Electrical		switchgear_switchboard_stand	M-1000618		
16	8602 Switchgear Maintenance SWO 2976	Switchgear, Main Electrical F	8602	7	Abbott Hall	6	Zone 6 Electrical		switchgear_switchboard_stand	M-1000618		
17	8602 Transformer Maintenance SWO 2754	Dry Transformer	8602	3	Abbott Hall	6	Zone 6 Electrical	33786, 33747,	xTransformer_Maintenance			
18	8602 UPS Maintenance SWO 3550	Emergency UPS	8602	7	Abbott Hall	6	Zone 6 Electrical	34252	ups_standard	M-1000644		
19	8602 Variable Frequency Drive SWO 2706	Variable Frequency Drive	8602	6	Abbott Hall	6	Zone 6 Electrical		vfd_standard			
20	8602 Air Handling Unit - AHU-1	Air Handling Unit	8602	2	Abbott Hall	6	Zone 6 Engineer	33764	airhandler_generic		Q-1000299	
21	8602 Air Handling Unit - AHU-15	Air Handling Unit	8602	2	Abbott Hall	6	Zone 6 Engineer	34242	airhandler_generic		Q-1000299	
22	8602 Air Handling Unit - AHU-SF-1	Air Handling Unit	8602	2	Abbott Hall	6	Zone 6 Engineer	34295	airhandler_generic		Q-1000299	
23	8602 Air Handling Unit - Elevator Unit	Air Handling Unit	8602	2	Abbott Hall	6	Zone 6 Engineer	33750	airhandler_generic		Q-1000299	
24	8602 Booster Pump	Booster Pump	8602	7	Abbott Hall	6	Zone 6 Engineer	34291, 34292,	pump_centrifugal			Q-1000
25	8602 Chiller	Chiller	8602	7	Abbott Hall	6	Zone 6 Engineer	34255, 34286	chiller_reciprocating			A-1000
26	8602 Condensate Pump	Condensate Pump	8602	7	Abbott Hall	6	Zone 6 Engineer	33842	pump_centrifugal			Q-1000
27	8602 Condenser	Condenser	8602	10	Abbott Hall	6	Zone 6 Engineer	33770, 33771,	acunit_splitsystem		Q-1000355	Q-1000
28	8602 Evaporator	Evaporator	8602	7	Abbott Hall	6	Zone 6 Engineer	39942, 39952,	acunit_splitsystem			S-1000
29	8602 Exhaust Fan	Exhaust Fan	8602	7	Abbott Hall	6	Zone 6 Engineer	33822, 33824,	exhaust-return_fan_unit_stand		Q-1000385	
30	8602 Fan Coil Unit	Fan Coil Unit	8602	7	Abbott Hall	6	Zone 6 Engineer	40299, 40301,	fan_coil_unit_standard			S-1000
31	8602 Supply Fan	Supply Fan	8602	7	Abbott Hall	6	Zone 6 Engineer	33828, 33827,	exhaust-return_fan_unit_stand		Q-1000385	
32	8602 Window AC Unit	Window AC Unit	8602	4	Abbott Hall	6	Zone 6 Engineer	238, 40239, 40	ac_unit_friedrich			A-1000
33	8890 Indoor Air Handling Unit AHU-15	Air Handling Unit	8602	7	Abbott Hall	6	Zone 6 Engineer	34242	airhandler_generic		Q-1000299	
34	8890 Indoor Air Handling Unit - AHU-SF-1	Air Handling Unit	8602	7	Abbott Hall	6	Zone 6 Engineer	34295	airhandler_generic		Q-1000299	
35	8890 Indoor Air Handling Unit AHU-1	Air Handling Unit	8602	7	Abbott Hall	6	Zone 6 Engineer	33764	airhandler_generic		Q-1000299	

Ready Calculate 80%

PROCESS



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

Requests

Projects

Tasks

Maintenance

Inventory

Portfolio

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...

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



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>>

Task ID	Task Name	Task Description	Task Type	Request Class	Task Prior
WT-1058356	COVID WASTEWATER MANAGEMENT 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

INFORMATION



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

Add 4

Job Plans Apply Filters Clear Filters

<input type="checkbox"/>	!	Building ID	Building Name	Job Plan Name	Job Plan ID	Description	Primary Workgroup	Status
		Contains	Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	∨	8864	1201 Davis	1201 Davis Contract...	886499		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	8854	1800 Sherman	1800 Sherman Cont...	885499		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	8838	1801 Hinman	1801 Hinman Contr...	883899		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	8920	1801 Maple	1801 Maple Contrac...	892099		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	1808	Anderson Hall	1808 Backflow Prev...	1000842		Zone 5 Engineer	Revision In Pr
<input type="checkbox"/>	∨	8744	1808 Chicago	1808 Chicago Contr...	874499		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	8745	1809 Chicago	1809 Chicago Contr...	874599		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	8756	1810 Hinman	1810 Hinman Contr...	875699		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	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



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

5a	ID	Status
	* Job Plan Name <input type="text"/>	
	Description <input type="text"/>	
5b	* Building <input type="text"/>	Building Name <input type="text"/>
		Building Address <input type="text"/>

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

Find
Clear
Update Task Assignment

Workgroups
Apply Filters Clear Filters Refresh Star Download

Workgroup Name	Short Name	Work Group Class
<input type="checkbox"/> Contains	<input type="checkbox"/> Contains	<input type="checkbox"/> Contains
<input type="checkbox"/> Zone 5 Engineer	Z5ENG	Shop
<input type="checkbox"/> Zone 6 Carpenter	Z6CARP	Shop
<input type="checkbox"/> Zone 6 Contractor Custodian	Z6 Contract Custodian	Vendor
<input checked="" type="checkbox"/> Zone 6 Contractor Exterminator	Z6 Contract Elevator	Vendor
<input type="checkbox"/> Zone 6 Contractor Exterminator	Z6 Contract Exterminator	Vendor
<input type="checkbox"/> Zone 6 DDC	Z6DDC	Shop
<input type="checkbox"/> Zone 6 Electrician	Z6ELEC	Shop

Find
Remove



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 <input type="text" value="Mcgaw/Olson - Life Safety Infrastructure SWO 2741"/>	
Description <input type="text"/>	
* Building <input type="text" value="\Locations\Chicago Campus\Mcgaw/Olson"/> <input type="button" value="🔍"/> <input type="button" value="✕"/>	Building Name McGaw/Olson
Building ID 8799	Building Address 710 Fairbanks Ct

Assign Multiple Workgroups?

Primary Workgroup Find | Clear | Update Task Assignment

Name

Assets Schedules Tasks

Assets 7a Find Remove

0 total found Show: 50 ▾

<input type="checkbox"/>	! 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 7d OK ✓ Cancel x

	Image	Name	Asset ID	Specification Name	Spec Class	Brand	Primary Location
<input type="checkbox"/>		Contains:	35454	Contains	Contain	Cont	Contains
<input checked="" type="checkbox"/>		Emergency ...	35454	Emergency Breaker Panel	ELECTRICAL		\Locations\Chicago Campus\

7b

7c

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
 | |

Name

Asset: PM Schedules Tasks

PM Schedules 8a Add

0 total found Show:

<input type="checkbox"/> ! 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

PM Schedule: Print Help

Create Draft x

(Required): Preventive Maintenance Schedule Details.

General

ID	Name	Status
8b	<input style="width: 90%;" type="text"/>	

Description

Detail

* Request Class Search X

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

PM Type

Frequency

Create Recurring Pattern

Billing Type

Add

Show: v

Status



PROCESS

continued...

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

9) Add the **PM Schedule**:

- Enter the **State Date** for the procedure.
- DO NOT change the Recurrence Pattern Type from the Monthly option.**
- Enter the Day of the month the recurrence will occur and the number of months between the recurrence.
- 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

PM Event: 1001991 Print Help

(Required):

Event Info 9d

* **Start Date** 25 x

Select an Occurrence Type 9a

Single Occurrence End After
 DAILY End Date
 MONTHLY 9b
 Ad hoc

Monthly Recurrence

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

9c **Day (1-31)** of Every 9c

Months to Skip (Seasonal)

January <input type="checkbox"/>	April <input type="checkbox"/>	July <input type="checkbox"/>	October <input type="checkbox"/>
February <input type="checkbox"/>	May <input type="checkbox"/>	August <input type="checkbox"/>	November <input type="checkbox"/>
March <input type="checkbox"/>	June <input type="checkbox"/>	September <input type="checkbox"/>	December <input type="checkbox"/>

Add

Status Show: 50



▼ 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

PM Event: 1001991 Print Help

9e

Complete

(Optional): .

Details

Offset Duration 0 (allowable + or - date overlap when creating shadow occurrer)

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 x

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

PM Type

Frequency

Create Recurring Pattern

Billing Type

Add

Show: 50

Status



▼ 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** information can be found on a 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.

General

ID	Status
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 ▼

Frequency

Create Recurring Pattern

Billing Type

10a



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.

INFORMATION

Billing Type and **Chartstring** information can be found on a 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

10c OK ✓ Cancel x

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
<input checked="" type="radio"/>	Intra-FM Charge PM Schedule	Facilities	\Classifications\Request Class\Buildin
<input type="radio"/>	No Charge PM Schedule	Facilities	\Classifications\Request Class\Buildin
<input type="radio"/>	Non Building Charge PM Schedule	Facilities	\Classifications\Request Class\Buildin

Frequency

Create Recurring Pattern

Billing Type

Add

Show: 50

Status



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** information can be found on a 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 X

PM Schedule: Print Help X

Detail

* **Request Class** Intra-FM Charge PM Schedule Search X

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

PM Type Schedule-Based ▼

Frequency

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** information can be found on a 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 X

Create Draft x

(Required): Preventive Maintenance Schedule Details.

Request Chart String: Print Help X

Create x

(General): Required

General

* Request Chart String <input type="text"/> 🔍	Status <input type="text"/>
Chart String Status <input type="text"/>	* Requested Percent <input type="text"/>
Name <input type="text"/>	Description <input type="text"/>

Revenue Account Code 53595

Create x

Billing Type

Add

Show: 50

Status

11b



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** information can be found on a 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.

11d OK ✓ Cancel x

Chart Strings Apply Filters Clear Filters ↻ ☆ ↓

Chartstring	Fund Code	Dept ID	Project ID	Activity ID
<input checked="" type="radio"/> Contains	Contains	Contains	Contains	Contains
<input type="radio"/> 160-1800000	160	1800000		
<input type="radio"/> 160-1800099	160	1800099		
<input type="radio"/> 160-1800200	160	1800200		
<input type="radio"/> 160-1800300	160	1800300		

- Billing Type

Add

Show: 50

Status



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 charstring. If only one chartstring is selected, the percentage will be 100%
- f) Click **Create** to save.

INFORMATION

Billing Type and **Chartstring** information can be found on a 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

Request Chart String: Print Help

11f Create x

(General): Required

General

ID	Status
* <u>Request Chart String</u> <input style="width: 150px;" type="text" value="160-1800000"/> 11e	* <u>Requested Percent</u> <input style="width: 100px;" type="text"/>
Chart String Status Active	<u>Revenue Account Code</u> 53595
Name <input style="width: 100px;" type="text"/>	Description <input style="width: 100px;" type="text"/>

Create x

Create Recurring Pattern

Billing Type

Add

Show: v

Status

PROCESS

continued...

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

12) Once the chartstring has 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.

PM Schedule: Print Help

12a **Create Draft** x

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

PM Schedule: 1001953 Add To Bookmarks Print Help

12b **Activate** Save Save & Close More x

General

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



PROCESS

continued...

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

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

INFORMATION

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

Description

* Building Building Name Mcgaw/Olson

Building ID 8799 Building Address 710 Fairbanks Ct

Assign Multiple Workgroups?

Primary Workgroup Find | Clear | Update Task Assignment

Name

Assets
PM Schedules
Tasks

PM Schedules Add

Export 1 total found Show: 50 ▾

	! Frequency	Name	Type	Recurrence in month(s)	Status
<input type="checkbox"/>	MONTHLY	Mcgaw/Olson - Life Safety Infrastructure Annual	Schedule-Based	12 months	Active

Activate
Save
Save & Close
More ▴
x

12



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 <input type="text" value="123"/>	
Description <input type="text"/>	
★ Building <input type="text" value="\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

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	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

13



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

PM Event: 1001991 Print Help

(Required):

14a **Event Info**

* **Start Date** 12/01/2021 12:00:00 25 x

14b **Recurrence Pattern Type** MONTHLY

14c **Monthly Recurrence**

Day [x] of every [x] month(s)

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

14d **Next**

Months to skip (Seasonal)

January <input type="checkbox"/>	April <input type="checkbox"/>	July <input type="checkbox"/>	October <input type="checkbox"/>
February <input type="checkbox"/>	May <input type="checkbox"/>	August <input type="checkbox"/>	November <input type="checkbox"/>
March <input type="checkbox"/>	June <input type="checkbox"/>	September <input type="checkbox"/>	December <input type="checkbox"/>

Add

Show: 50 Status



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

PM Event: 1001991 Print Help Complete x

(Optional): .

Details

Offset Duration 0 25 x (allowable + or - date overlap when creating shadow occurrer)

Select the Shadowing PM Schedules Find Remove

OK ✓ Cancel

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

<input type="checkbox"/>	!	Name	ID	Description	Status
<input checked="" type="checkbox"/>		McGaw/Olson - Life Safety Infrastructure Annual	1001953		Active

Billing Type

15a

15b

15c



PROCESS

continued...

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

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

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

INFORMATION

Job Plan: Add To Bookmarks Print Help

General Notes & Documents Create Draft x

(Required): Job Plan Details.

Assets PM Schedules Tasks

PM Event: 1001996 Print Help

15d **Complete** x

(Optional): .

Details

Offset Duration 0 (allowable + or - date overlap when creating shadow occurrences)

Select the Shadowing PM Schedules Find Remove

[Export](#) 1 total found Show: 10

<input type="checkbox"/>	! Frequency	Name	Service Plan
<input type="checkbox"/>	MONTHLY	McGaw/Olson - Life Safety Infrastructure Annual	DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

Complete x

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,

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 <input type="text" value="Mcgaw/Olson - Life Safety Infrastructure Monthly"/>	
Description <input type="text"/>	

PM Schedule: 1001954 Add To Bookmarks Print Help

16b **Activate** Save Save & Close More x

(Required): Preventive Maintenance Schedule Details.

General

ID	Status
ID 1001954	Status Draft
Name <input type="text" value="Mcgaw/Olson - Life Safety Infrastructure Monthly"/>	
Description <input type="text"/>	



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 123

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 ↺ ☆ ↓

<input type="checkbox"/>	!	Frequency	Name	Type	Recurrence in month(s)	Status
<input type="checkbox"/>		Contains	Contains	Contains	Equals	Contains
<input type="checkbox"/>		MONTHLY	123	Schedule-Based	0 months	Draft
<input type="checkbox"/>		MONTHLY		Schedule-Based	12 months	Active

Items per page: 10 1 - 2 of 2 items 1 of 1 pages

17



PROCESS

continued...

On the **Tasks** sub-tab,

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

INFORMATION

Job Plan: 1001546

General Notes & Documents

Name: Zone 6 Contractor Exterminator

Assets PM Schedules **Tasks**

Re-Process Planned Tasks Generate Work

18

Apply Filters Clear Filters

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



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

General Notes & Documents 19 **Activate** Save Save & Close More x

(Required): Job Plan Details.

General

ID 1001546 Status Draft

* Job Plan Name 123

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
<input type="checkbox"/>	! Image					
<input type="checkbox"/>		35454	Emergency_Breaker_Panel	Available	■	

Activate 19 Save Save & Close More x



PROCESS

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

INFORMATION

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Plan Work

Add to Bookmarks My Bookmarks

Job Plans

		Building ID	Building Name	Job Plan Name	Job Plan ID	Description	Primary Workgroup	Status
<input type="checkbox"/>	!							
		Contains	Contains	Contains	Contains	Contains	Contains	Contains
<input type="checkbox"/>	∨	8864	1201 Davis	1201 Davis Contract	886499		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	0511	Ch - Heating Plant	123	1001546		Zone 6 Contractor Exter...	
<input type="checkbox"/>	∨	8854	1800 Sherman	1800 Sherman Cont...	885499		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	8838	1801 Hinman	1801 Hinman Contr...	883899		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	8920	1801 Maple	1801 Maple Contrac...	892099		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	1808	Anderson Hall	1808 Backflow Prev...	1000842		Zone 5 Engineer	Revision In Pr
<input type="checkbox"/>	∨	8744	1808 Chicago	1808 Chicago Contr...	874499		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	8745	1809 Chicago	1809 Chicago Contr...	874599		Evanston PM Contractor	Active
<input type="checkbox"/>	∨	8756	1810 Hinman	1810 Hinman Contr...	875699		Evanston PM Contractor	Active

Items per page: 50 1 - 50 of 1176 items 1 of 24 pages

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