



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

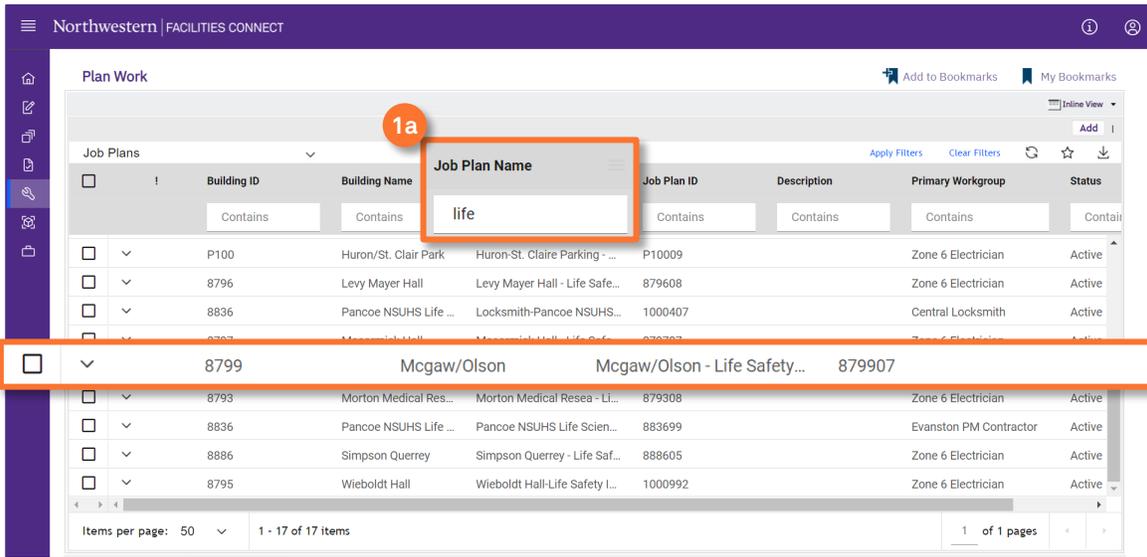
This guide begins on the Plan Work screen. For more information on navigating to the Plan Work screen, refer to the **Setting Up a New Job Plan** manual.

DIRECTIONS:

1 From the Plan Work screen, locate the **Job Plan** that you want to edit:

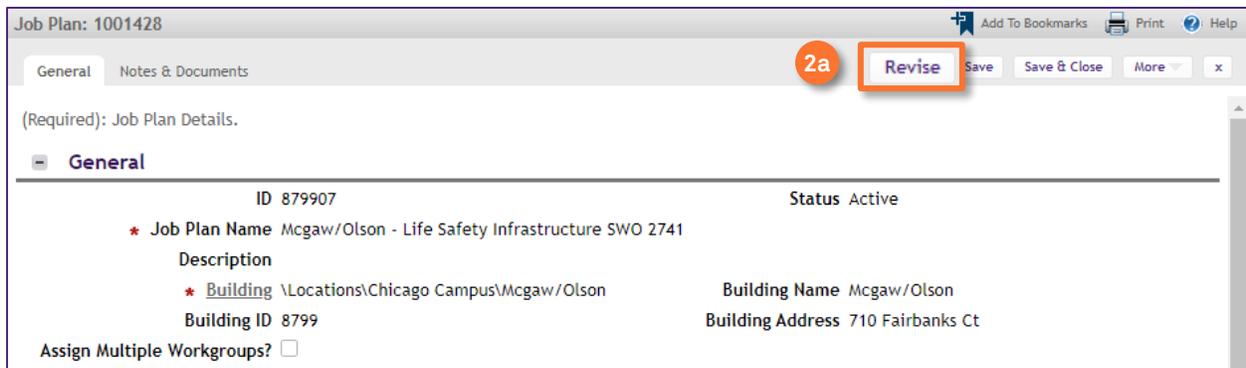
1a Enter **key words** into the column search boxes.

1b Click on the **Job Plan** to open it.



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

2a Click on **Revise** to edit the Job Plan.





PREVENTIVE MAINTENANCE JOB PLANS: AD HOC WORK TASKS

DIRECTIONS:

3 Once the Job Plan is in the Revise stage:

3a Click on the **PM Schedules** sub-tab.

The screenshot shows the 'Job Plan: 1001428' interface. The 'General' tab is active, displaying details for Job Plan ID 879907, 'McGaw/Olson - Life Safety Infrastructure SWO 2741'. The 'Primary Workgroup' section is expanded, and the 'PM Schedules' sub-tab is highlighted with a red box and labeled '3a'. Below this, a table lists PM Schedules with columns for Frequency, Name, Type, Recurrence in month(s), and Status. Two items are visible: one with a 12-month recurrence (Retired) and one with a 1-month recurrence (Active).

4 On the PM Schedule tab:

4a Click on the **Add** button.

The screenshot shows the same 'Job Plan: 1001428' interface. The 'PM Schedules' sub-tab is now selected, and the 'Add' button in the top right corner of the sub-tab area is highlighted with a red box and labeled '4a'. The table below shows the same two PM Schedules as in the previous screenshot.



PREVENTIVE MAINTENANCE JOB PLANS: AD HOC WORK TASKS

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
- 5c Request Class

The screenshot shows a software window titled "Job Plan: 1001428" with a "General" tab selected. The "PM Schedule:" section is active, showing a "Create Draft" button. Below this, a "(Required): Preventive Maintenance Schedule Details." section is expanded to show the "General" sub-section. Three fields are highlighted with orange boxes and labeled: "5a" for the "Name" field containing "Ad Hoc Work Task", "5b" for the "Description" field containing "description of Ad Hoc Work Task", and "5c" for the "Request Class" dropdown menu which is set to "Building Charge PM Schedule". Other visible fields include "PM Type" set to "Schedule-Based" and a "Create Recurring Pattern" link.

6

Next, click on **Create Recurring Patter**.

This screenshot shows the same "PM Schedule:" window, but now the "Detail" sub-section is expanded. The "General" section is still visible, showing the "Name" and "Description" fields. In the "Detail" section, the "Request Class" is "Building Charge PM Schedule", the "Service Plan" is "DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task", and the "PM Type" is "Schedule-Based". The "Create Recurring Pattern" link is highlighted with an orange box and labeled "6". Below this, the "Billing Type" section is partially visible, showing "Billing Type" and "Building".



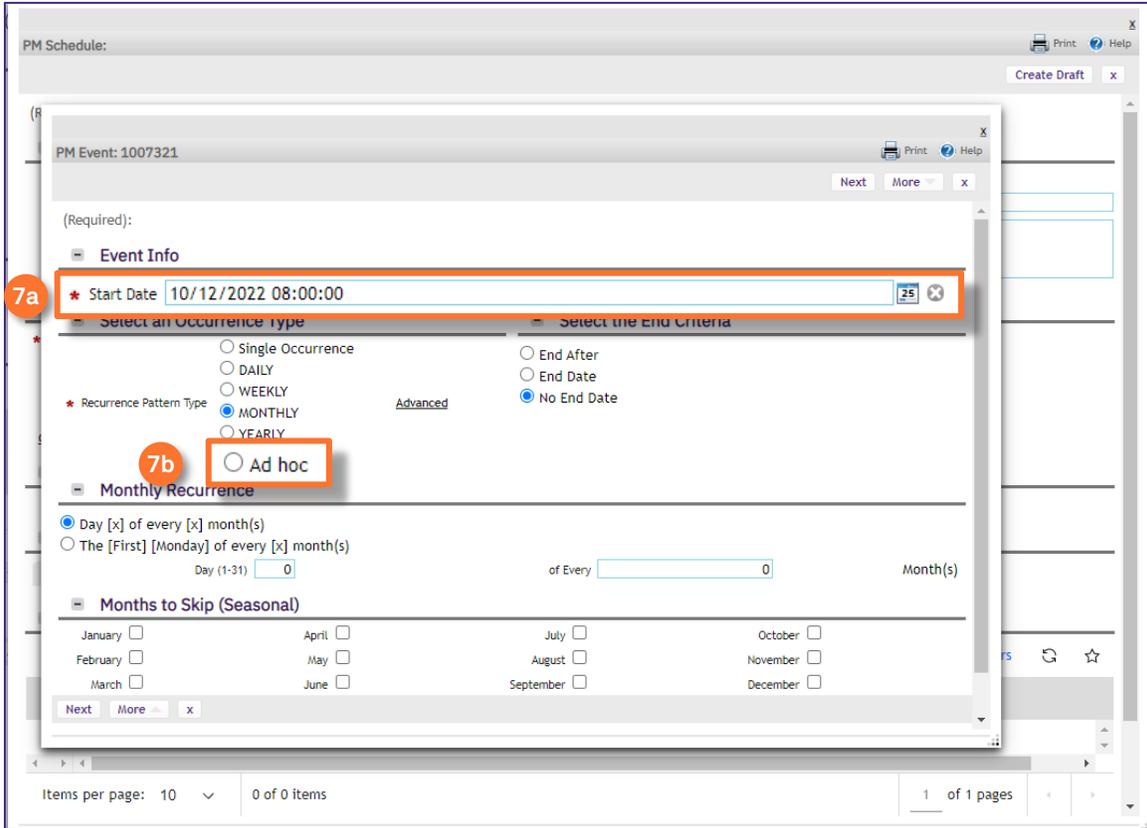
PREVENTIVE MAINTENANCE

JOB PLANS: AD HOC WORK TASKS

DIRECTIONS:

7 Upon clicking, PM Event window will open:

- 7a Enter the **Start Date** by using the **calendar** button.
- 7b Click on the **Ad hoc** radio button.





PREVENTIVE MAINTENANCE

JOB PLANS: AD HOC WORK TASKS

DIRECTIONS:

8 If you need to add multiple Ad Hoc Work Tasks:

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

PM Event: 1007326

(Required):

Event Info

Start Date: 10/11/2022 13:21:29

Select an Occurrence Type

Recurrence Pattern Type: Ad hoc

Also Schedule On (highlighted with orange box and circled 8)

0 total found

Start Date

No data to display

Save

9 Once you have added all dates:

9 Click on the **Next** button.

PM Event: 1007326

(Required):

Event Info

Start Date: 10/11/2022 13:21:29

Select an Occurrence Type

Recurrence Pattern Type: Ad hoc

Also Schedule On (highlighted with orange box and circled 9)

0 total found

Start Date

No data to display

Save

Next (highlighted with orange box and circled 9)



PREVENTIVE MAINTENANCE

JOB PLANS: AD HOC WORK TASKS

DIRECTIONS:

10

Next, click **Complete**.

PM Event: 1007321

(Optional): .

Details

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

Select the Shadowing PM Schedules

Frequency	Name	Service Plan
No data to display		

Items per page: 10 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.

11

Once back on the Job Plan window:

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

Job Plan: 1001428

General Notes & Documents

(Required): Job Plan Details.

General

ID 879907 Status: Revision In Progress

Job Plan Name: Mcgaw/Olson - Life Safety Infrastructure SWO 2741

Description: [Empty]

Building: \Locations\Chicago Campus\Mcgaw/Olson Building Name: Mcgaw/Olson

Building ID: 8799 Building Address: 710 Fairbanks Ct

Assign Multiple Workgroups?

Primary Workgroup

Name: Zone 6 Electrician

Assets PM Schedules Tasks

PM Schedules

Frequency	Name	Type	Recurrence in month(s)	Status
Ad hoc	Ad Hoc Work Task	Schedule-Based	0 months	Processing
MONTHLY	Mcgaw/Olson - Life Safety Infrastr...	Schedule-Based	12 months	Retired
MONTHLY	Mcgaw/Olson - Life Safety Infrastr...	Schedule-Based	1 months	Active

Items per page: 10 1 - 3 of 3 items 1 of 1 pages



PREVENTIVE MAINTENANCE

JOB PLANS: AD HOC WORK TASKS

DIRECTIONS:

12

Finally, **Save** and **Activate** your Job Plan.

Job Plan: 1001428

General Notes & Documents

(Required): Job Plan Details.

General

ID: 879907 Status: Revision In Progress

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 Electrician

Assets PM Schedules Tasks

PM Schedules Add

	Frequency	Name	Type	Recurrence in month(s)	Status
<input type="checkbox"/>	Contains	Contains	Contains	Equals	Contains
<input type="checkbox"/>	Ad hoc	Ad Hoc Work Task	Schedule-Based	0 months	Processing
<input type="checkbox"/>	MONTHLY	McGaw/Olson - Life Safety Infrast...	Schedule-Based	12 months	Retired
<input type="checkbox"/>	MONTHLY	McGaw/Olson - Life Safety Infrast...	Schedule-Based	1 months	Active

1 of 1 pages