



CUSTOMER SERVICE

CREATE A PREVENTIVE MAINTENANCE WORK TASK

Provides guidance for creating a Work Task for Preventive Maintenance in Facilities Connect.

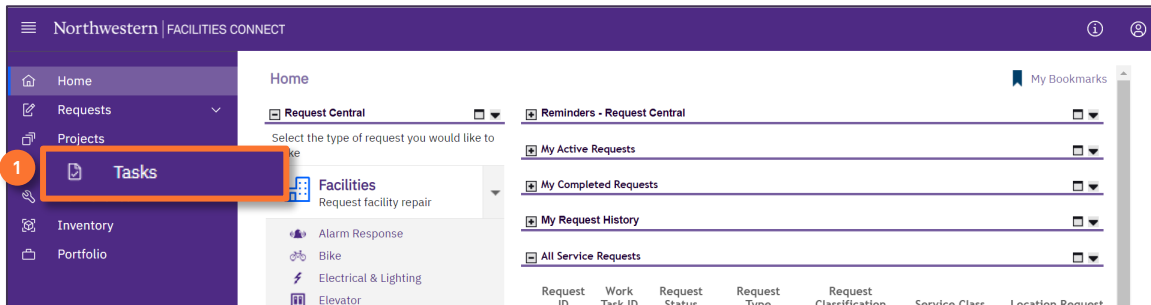
▼ IMPORTANT

Work Task created in this manner circumvent the normal process of **Work Task** creation. This method is only to be used in specific situations where a **Work Task** cannot be generated through a **Service Request**.

DIRECTIONS:

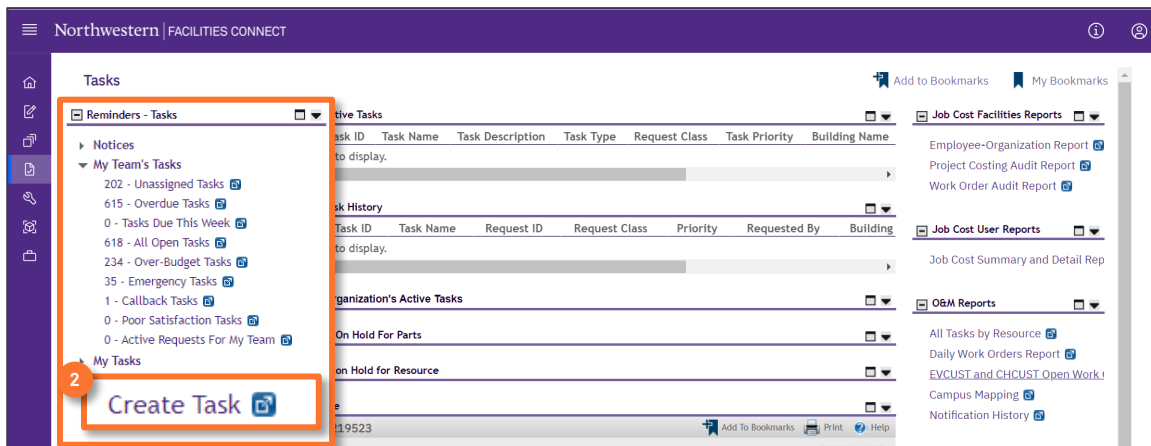
1 From the **Facilities Connect Home Screen**:

1 Click on the **Task** section.



2 Upon clicking, you will be taken to the **Task** screen. In the **Reminders – Tasks** section:

2 Click on the **Create Task** link.





CUSTOMER SERVICE

CREATE A PREVENTIVE MAINTENANCE WORK TASK

DIRECTIONS:

3 Upon clicking, you will be taken to the **Create Task Form**. In the **General** section:

3 Enter **Task Name** and the **Description** of the Work Task.

Home > Tasks > Create Task

Print | Open In New Window | Add to Bookmarks | My Bookmarks

General | Job Cost | Work Details | Resources | Procedures | Notifications | Notes & Documents | Work Task Info | Audit Actions

(Required): Use this tab to enter, review, or change basic information about the task.

General | Accept | Start Work | Stop Work

Task ID: [] Status: []

3 **Task Name** Air Handler Unit Preventive Maintenance | Assignment Status: []

3 **Description** TEST
General inspection. Lubricate motor and blower bearings.

4 In the **Details** section:

4a Enter the **Task Type**, **Task Priority**, **Request Class**, and **Service Class**.

Details

4a **Task Type** Preventive | **Task Priority** Routine

Request Class Preventative Maintenance | **Service Class** Preventative Maintenance

Primary Work Location: [] | Building Address: []

Geography Lookup: [] | Building Name: []

Customer Organization: [] | Building Primary Use: []

Preferred Access Time: []

▼ IMPORTANT

To be sure the created **Work Task** is properly classified, only select the following details:

Task Type: Preventive

Task Priority: Routine

Request Class: Facilities > Preventive Maintenance (level 2) – **DO NOT SELECT** PM Corrective Maintenance

Service Class: Facilities > Preventive Maintenance (level 2)

Request Class

- General Repairs & Maintenance
- Health & Safety
- Housekeeping
- Key/Lock/Access
- Motor Pool Reservation
- Pest & Animal Control
- Plumbing & Leaks
- Preventative Maintenance**
- ~~PM Corrective Maintenance~~ ❌

Service Class

- Health & Safety
- Housekeeping
- Key, Lock & Access
- Motor Pool Reservation
- Pest & Animal Control
- Plumbing
- Plumbing & Leaks
- Preventative Maintenance**
- Projects



CUSTOMER SERVICE

CREATE A PREVENTIVE MAINTENANCE WORK TASK

DIRECTIONS:

4

Continued. In the **Details** section:

4b Click on the **Find** button next to **Primary Work Location**.

Name	Hierarchy Path	Description	Status
Contains	Contains	Contains	Contains
Chicago Campus	\Locations\Chicago Camp...		Active
105 W. Adams	\Locations\Chicago Camp...	105 W. Adams	Active
210 S. Clark Street	\Locations\Chicago Camp...	210 S. Clark Street	Active
211 E. Ontario	\Locations\Chicago Camp...	211 E. Ontario	Active
02	\Locations\Chicago Camp...	2nd Floor	Active

4c Click on the dropdown menu to narrow you search and select the **Primary Work Location**.

▼ INFORMATION

Generally, only the **Property** i.e. campus or **Building** are required. If the **Primary Work Location** needs to be more specific you can utilize the additional filters to select a more detailed location.

Properties

Buildings

ID	Name
Contains	Contains
CH	Chicago Campus
EV	Evanston Campus

Name	City
Contains	Contains
Ch - Heating Plant	Chicago
Blomquist	Evanston



CUSTOMER SERVICE

CREATE A PREVENTIVE MAINTENANCE WORK TASK

DIRECTIONS:

5 In the **Responsible Organization** section:

5a Click the **Find** button.

The screenshot shows a form titled "Responsible Organization". At the top right, there are buttons for "Assign", "Auto-", "Find", and "Clear". The "Find" button is highlighted with a red box and labeled "5a". Below the buttons, there are input fields for "Short Name" and "Organization Type", and a "Hierarchy Path" field.

Upon clicking, the **Find Organizations** pop-up window will appear.

5b Use the filter dropdown menu and the search function to locate the appropriate **Work Group**.

The screenshot shows a "Find Organizations" pop-up window. It has a search bar and a filter dropdown menu. The "Work Groups" filter is selected and highlighted with a red box, labeled "5b". Below the filter, there is a table with columns for "Name", "ID", and "Hierarchy Path".

Name	ID	Hierarchy Path
IOLANI SCHOOL	0000162773	\Organizations\Vendors\IOLANI SCHOOL
(GES) GLOBAL EXP...	0000134389	\Organizations\Vendors\GES) GLOBAL EXPERIENCE SPECIALISTS, INC

5c Click on the **Radio** button for the **Workgroup** you wish to select.

5d Click on the **Ok** button.

The screenshot shows a "Work Groups" pop-up window. It has a search bar and a filter dropdown menu. The "Ok" button is highlighted with a red box and labeled "5d". Below the filter, there is a table with columns for "Name", "ID", and "Type". The radio button for "Central Carpenter" is highlighted with a red box and labeled "5c".

Name	ID	Type
Central Auto Mechanic	1042847	Workgroup
Central Carpenter	1042848	Workgroup
Central Contractor Custodian	1042885	Workgroup
Central Contractor Elevator	1042886	Workgroup



CUSTOMER SERVICE

CREATE A PREVENTIVE MAINTENANCE WORK TASK

▼ INFORMATION

Selecting the **Planned Start** and **Planned End** dates are not required. If you would like to set parameters for when the **Preventive Maintenance Work Task** will be completed or if you need to adjust the date range, follow the steps below otherwise skip to step 7.

DIRECTIONS:

6

Optional. Upon clicking, you will be returned to the **Create Task Form**. In the **Planned** section:

- 6a Enter a **Planned Start Date**.
- 6b Enter **Planned Working Days** and **Planned Working Hours** (the sum of these two fields will be used to calculate duration).

The screenshot shows the 'Planned' section of a form. It includes several input fields:

- Planned Start (Respond Date):** 06/08/2020 16:54:16 (highlighted with 6a)
- Planned End (Due Date):** (empty)
- Planned Follow-Up Date:** 06/08/2020 15:43:31
- C. Planned Working Days:** 0 (highlighted with 6b)
- D. Planned Working Hours:** 0 (highlighted with 6b)
- Working Hours (C+D):** 0 hours
- Constraint Type:**:** As Soon As Possible
- Constraint Date/Time**:** (empty)

 There are also fields for 'Respond Within', 'Planned Duration (Due Within)', and 'Follow-Up Within', all set to 0. A note at the bottom states: '**These fields are used in conjunction with Gantt scheduling only.'

7

Next, at the top of the **Create Task Form**:

- 7 Click on the **Job Cost** tab.

The screenshot shows the top of the 'Create Task' form. The 'Job Cost' tab is selected and highlighted with an orange box and labeled 7. Below the tabs, the 'General' section is visible, containing fields for:

- Task ID:** (empty)
- Task Name:** (empty)
- Description:** (empty text area)
- Status:** (empty)
- Assignment Status:** (empty)

 At the top right of the form, there are buttons for 'Print', 'Open In New Window', 'Add to Bookmarks', and 'My Bookmarks'. Below the tabs, there are buttons for 'Create Draft', 'Activate', and 'Planned'. At the bottom of the 'General' section, there are buttons for 'Accept', 'Start Work', and 'Stop Work'. A note above the 'General' section says: '(Required): Use this tab to enter, review, or change basic information about the task.'



CUSTOMER SERVICE

CREATE A PREVENTIVE MAINTENANCE WORK TASK

DIRECTIONS:

8

Upon clicking, you will be taken to the **Job Cost** tab. In the **Job Cost Billing** section:

- 8a Click on the **Billing Type** dropdown menu and select the appropriate **Billing Type**.
- 8b Click on the **Create Draft** button.

Home > Tasks > Create Task

Print Open In New Window My Bookmarks

General Job Cost Work Details Resources Procedures Notifications Notes & Documents Work Task Info Audit Actions

(Optional): Use this tab to enter, review, or change Job Cost information for this Task

Cost Summary

Total Time Log Cost	\$5.00	US Dollars	Total Invoice - Submitted	\$5.00	US Dollars
Total Material List Cost	\$5.00	US Dollars	Total Invoice - Paid	\$5.00	US Dollars
Total Inventory Consumable Cost	\$5.00	US Dollars	Total Material Order Cost	\$5.00	US Dollars
Total Inventory Assignable Cost	\$5.00	US Dollars			
Total PCard Line Item Cost	\$5.00	US Dollars			
Total PO Line Item Cost	\$5.00	US Dollars			
Total Service Provider Cost	\$5.00	US Dollars			
Total Cost	\$5.00	US Dollars			

Work Task Billing Allocations Add Remove

0 total found

ID	Name	Description	Chart String	Revenue Account Code	Base Percent	Job Cost Percent	Chart String Status
No data to display							
						0	

Job Cost Billing 8a

* Billing Type Building
Non-Building
Intra-FM
No Charge * Billing Status Active

9

In the **Work Task Billing Allocation** section:

- 9a Click on the **Add** button.

Work Task Billing Allocations 9a Add Remove

0 total found

ID	Name	Description	Chart String	Revenue Account Code	Base Percent	Job Cost Percent	Chart String Status
No data to display							
						0	



CUSTOMER SERVICE

CREATE A PREVENTIVE MAINTENANCE WORK TASK

DIRECTIONS:

9 Continued. Upon clicking, the **Task Chartstring** pop-up window will appear.

9b Enter the **Building Chartstring**, **Allocation Percent**, and the **Revenue Account Code**.

9c Click on the **Create** button.

The screenshot shows a 'General' tab form with the following fields and buttons:

- ID** (label)
- Status** (label)
- Description** (input field)
- Chart String Status** (label)
- * Chartstring** (input field with search icon)
- * Allocation Percent** (input field)
- * Revenue Account Code** (input field with search icon)
- Create** (button)

10 Upon clicking, you will be returned to the **Create Task Form**. To complete the form:

10 Click on the **Activate** button.

The screenshot shows the 'Job Cost' tab of the 'Create Task' form. The 'Cost Summary' section is expanded, showing the following table:

Total Time Log Cost	\$.00	US Dollars	Total Invoice - Submitted	\$.00	US Dollars
Total Material List Cost	\$.00	US Dollars	Total Invoice - Paid	\$.00	US Dollars
Total Inventory Consumable Cost	\$.00	US Dollars	Total Material Order Cost	\$.00	US Dollars
Total Inventory Assignable Cost	\$.00	US Dollars			
Total Backlog Item Cost	\$.00	US Dollars			

An **Activate** button is highlighted in the top right corner of the form.

▼ INFORMATION

Once the created **Work Task** has been **Activated** it will be searchable in **Facilities Connect**. For more information on how to locate **Work Tasks** in **Facilities Connect** please refer to Job Aid #XX.