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.

   ![Facilities Connect Home Screen](image1)

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

   ![Facilities Connect Task Screen](image2)
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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.

4 In the Details section:

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

*** 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)
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DIRECTIONS:

Continued. In the Details section:

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

4c Click on the dropdown menu to narrow your 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.
In the Responsible Organization section:

5a Click the Find button.

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.

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

5d Click on the Ok button.
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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).

7. Next, at the top of the Create Task Form:

7. Click on the Job Cost tab.
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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.

9 In the Work Task Billing Allocation section:

9a Click on the Add button.
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DIRECTIONS:

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


9c. Click on the Create button.

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

10. Click on the Activate button.

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.