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)

<table>
<thead>
<tr>
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<th>Action</th>
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Version 1.1
Release Date 03/04/2022
Owner NU Facilities

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

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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:

a) Possess the Asset Manager role and responsibilities
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.
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>>
4) Click on the Add button.

<<Upon clicking, a new Job Plan screen will open in a new window>>

<table>
<thead>
<tr>
<th>Job Plans</th>
<th>Building ID</th>
<th>Building Name</th>
<th>Job Plan Name</th>
<th>Job Plan ID</th>
<th>Description</th>
<th>Primary Workgroup</th>
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<td>Evanston PM Contractor</td>
<td>Active</td>
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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.

PM Building and Category master list:
   - Building Name – column E
   - Asset/Category – column B
   - SWO – columns R-U
   - Building Number – column C
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
On the Assets sub-tab,

7) Add the Asset(s):
   a) Click the Find button.
   <<Upon clicking, the Asset Search screen will pop up>>
On the **Assets** sub-tab,

7) **Add the Asset(s):**
   a) Enter the **Asset ID** number into the search column and hit enter.
   b) Mark the **check box** next to the correct Asset.
   c) Click **OK** to save.

**INFORMATION**

PM Building and Category master list:
- **Asset ID** – column H
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>>

PM Building and Category master list:
- Procedure Title – column I
- Frequency – columns J-O
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>>
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 Pattern Type** option, not the yearly option.
CREATE A NEW JOB PLAN

**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.
**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.
INFORMATION

Billing Type and Chartstring information can be found on a master list provided by the Reliability Engineer.

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.
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>>

Billing Type and Chartstring information can be found on a master list provided by the Reliability Engineer.
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>>

Billing Type and Chartstring information can be found on a master list provided by the Reliability Engineer.
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.
CREATE A NEW JOB PLAN

**INFORMATION**

Billing Type and Chartstring information can be found on a master list provided by the Reliability Engineer.

**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.

![Image of Job Plan Screen with arrows pointing to relevant fields]
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.
On the PM Schedules sub-tab,

12) The PM Schedule will now appear on the Job Plan window.
On the Tasks sub-tab,

13) The individual Job Plan Work Tasks will populate.
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.
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.
On the **PM Schedules** sub-tab,

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

   d) Click the **Complete** button to save.
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.
On the PM Schedules sub-tab,

17) BOTH the Annual and the Monthly PM Schedules will now appear on the Job Plan window.
On the **Tasks** sub-tab,

18) **ALL** Job Plan Work Tasks will populate and appear.
Once you have entered all information for the Job Plan,

19) Click **Activate**.

<<Upon clicking, the Job Plan screen will CLOSE>>
20) You will now be able to search for the Active Job Plan on the Plan Work screen.