Preventive Maintenance

CREATE JOB PLANS USING TEMPLATES
CREATE A NEW JOB PLAN WITH TEMPLATE

DOCUMENT SUMMARY
This job guide provides step-by-step instruction for adding bulk job plans in Facilities Connect using an excel template.

The purpose of this document is to serve as guided reference and/or new hire training.

VERSION INFORMATION (THIS DOCUMENT)

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<th>Action</th>
<th>Owner</th>
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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
GETTING STARTED

- This process will happen outside of Facilities Connect.
- Using the provided Template, you will enter the information for Job Plans and NUIT will bulk upload that information to Facilities Connect.
- While the FC Preventive Maintenance Template consists of many worksheets, the only worksheets we will be modifying are “Job Plan,” “Job Plan to Assets,” and “PM Schedule.” The tabs for these worksheets are highlighted purple.

PROCESS

[Excel screenshot showing the template in use]
To begin, open the **FC Preventive Maintenance Template** excel spreadsheet.

1. Start entering the information on the **Job Plan** tab:
   a) **ID** – generated by the user. Standard formatting is the first four digits of the building ID number (in this case Gary’s building ID 8798) and then a two digit suffix starting with “01” and increasing sequentially as job plans are added. The only exception is the “99” suffix, which is being used for contractor PM job plans. In other words, for example if we were to reach job plan 879898, the next job plan would be 8798100.
   b) **Job Plan Name** – generated by the user. Typically includes building name first and equipment assets. Larger/higher-value assets like air handling units typically have one job plan per asset, including the local equipment ID# and location. For example, the air handling unit might be titled, “Gary 5th Floor Air Handling Unit AHU-1”. Smaller items like exit signs and fans are typically grouped into a single PM like “Gary 5th Floor Exit Lights”.

### INFORMATION

**FC PREVENTIVE MAINTENANCE TEMPLATE**

Now viewing: FC PREVENTIVE MAINTENANCE TEMPLATE
To begin, open the FC Preventive Maintenance Template excel spreadsheet.

1) Start entering the information on the Job Plan tab (cont.):
   a) **Building** – full building path pulled from Facilities Connect building record.
   b) **Location Path** – the Location Path for the job.
   c) **Building** – full building path pulled from Facilities Connect building record.
   d) **Primary Workgroup** – the Workgroup that will complete the job plan.
2) Next, enter the information on the **Job Plan to Assets** tab:

This tab lists every asset that is associated with each job plan.

a) **ID** – each individual Project ID number. Must exactly match a job plan ID on the "Job Plan" tab.

b) **Job Plan Name** – each individual job plan name. Must exactly match the job plan name for the same job plan ID number on the "Job Plan" worksheet.

c) **Unique Building Equipment ID** – Asset ID number pulled from Facilities Connect asset record.
3) Next, enter the information on the **PM Schedule** tab:

- **a)** **ID** – Job Plan ID number. Must match a number exactly from the previous two tabs.

- **b)** **Job Plan Name** – name given to maintenance job plan. Must exactly match the corresponding job plan name for the same Job Plan ID number from the previous worksheets.

- **c)** **Unique PM Schedule** – building off of the Project ID number, the individual number given to each PM Job Plan Schedule. Each schedule ID is given a unique 3-digit suffix on top of the Job Plan ID. For instance, the first schedule for job plan 879801 is 879801001. Each different interval (Monthly, Quarterly, Semi-Annual, and Annual) gets its own PM Schedule.

- **d)** **PM Schedule Name** – building off of the Job Plan name, the individual name given to each PM Job Plan Schedule. Format is generally the job plan name followed by the frequency.
3) Next, enter the information on the **PM Schedule** tab:

   e) **Shadowed By ID** – the Unique PM Schedule ID of the Job Plan that could replace a job plan. For example, an annual job plan may replace a monthly job plan for one occurrence.

   f) **Procedure ID** – the safety procedure associated with the job plan, pulled from the Asset record. The maintenance procedure, technically called an “Inspection Procedure” in Facilities Connect, which is to be carried out at the given frequency. Determined in coordination with shop supervisors outside of Facilities Connect.

   g) **Start Date** – the date the job plan will go into effect. The date that the first work task is to be issued by the job plan. This date should always be the first of the month.

   h) **Monthly Recurrence Number** – the frequency of the job plan. The number of months between work tasks to be issued by the job plan. For example, a quarterly schedule would have a recurrence every three months.
3) Once you have completed the FC Preventive Maintenance Template:
   a) Email the completed form to the reliability engineer, currently Evan Goldstein at evan.goldstein@northwestern.edu
   b) He will verify form and send to NUIT to load into Facilities Connect.