Preventive Maintenance

ADD A NEW PROCEDURE
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DOCUMENT SUMMARY

This job guide provides step-by-step instruction for adding new Inspection Procedure in Facilities Connect.

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

VERSION INFORMATION (THIS DOCUMENT)

<table>
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<th>Version</th>
<th>Release Date</th>
<th>Action</th>
<th>Owner</th>
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<td>1.1</td>
<td>03/04/2022</td>
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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

To begin, access the Facilities Connect Home Screen.

In order to create Inspection Procedures as outlined in this job guide, the user **must**:

a) Possess the Asset Manager role and responsibilities

PROCESS

Northwestern FACILITIES CONNECT
1) To begin working with Procedures, click on the Maintenance tab in the hamburger menu on the left side of the Facilities Connect Home Screen.

<<Upon clicking, the Maintenance screen will open in the main window>>
2) Locate the Procedures section.

3) Click on the Inspection option.

<<Upon clicking, the Inspection screen will open in the main window>>
4) Click on the Add button.

<<Upon clicking, a new Inspection Procedure screen will open in a new window>>
To complete the Inspection Procedure, provide the following information:

Start on the General tab.

5) General section:
   a) Name – name convention follows:
      1. The Type of the asset the procedure will be attached to.
      2. The Manufacturer of the asset.
      3. The Frequency of the procedure.
   b) Procedure Active From – the start date of the procedure, or current date.
   c) Procedure Active To – the expiration or end date of the procedure. Put this date very far in the future to avoid...
6) Next add the individual Procedure Steps:
   a) Click the Quick Add button.

   <<Upon clicking, the Procedure Steps fields will open below>>

   b) Step # – number your steps by 10 (ex. 10, 20, 30). This will allow you to make additional steps if necessary.

   c) Name – put as much information regarding the step in the name. If you max out the character limit, make an additional step and number accordingly.

   d) Quick Add – after you have entered all the necessary information, click the Quick Add button to save the step.

▼ IMPORTANT

Complete step 6a-d for each step of the Procedure.
Once you have entered all the necessary Procedure Steps,

7) Click the Create Draft button to save the Procedure as a draft.
Once the Draft has been created,

8) Take note of the newly created ID number, if you are tracking the procedures in the Matrix.

9) Click on the **Activate** button to complete the new Inspection Procedure.

<<Upon clicking, the Inspection Procedure screen will close and you will return to the Portfolio window>>