Preventive Maintenance

ADD MULTIPLE CHARTSTRINGS TO A NEW JOB PLAN
CREATE A NEW JOB PLAN

DOCUMENT SUMMARY

This job guide provides step-by-step instruction for adding new Job Plan with multiple chartstrings in Facilities Connect.

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

Please note that to add multiple chartstrings to a Job Plan, the Job Plan must be set up manually and a template cannot be used.

VERSION INFORMATION (THIS DOCUMENT)

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REVISION HISTORY

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Before you begin on Facilities Connect, you will need to decide how the billing for tasks generated by the job plan you are issuing will be allocated. The spreadsheet at right is an example of billing allocations calculated for a particular task, listed by chartstring. Note that the total allocations need to add up to 100% for any given task.

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 down 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>>
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.
   b) Click the radio button next to the Workgroup name.
   c) Click OK to save.

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):
   b) Enter the Asset ID number into the search column and hit enter.
   c) Mark the check box next to the correct Asset.
   d) Click OK to save.

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>>
CREATE A NEW JOB PLAN

**PROCESS**

continued...

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>>

**INFORMATION**

PM Building and Category master list:

- Procedure Title – column I
- Frequency – columns J-O
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.
On the PM Schedules sub-tab,

9) Add the PM Schedule:
   a) 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.
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>>

Billing Type and Chartstring allocation information can be found on the campus specific Multi-Buildings Assets master list provided by the Reliability Engineer.
On the PM Schedules sub-tab,

10) Change the Request Class to update the Billing Type:
   a) Select the Intra-FM Charge option.
   b) Click OK to save.

**IMPORTANT**

Billing Type and Chartstring allocation information can be found on the campus specific Multi-Buildings Assets master list provided by the Reliability Engineer.
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 allocation information can be found on the campus specific Multi-Buildings Assets master list provided by the Reliability Engineer.
On the **PM Schedules** sub-tab,

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>>

**Information**

Billing Type and Chartstring allocation information can be found on the campus specific Multi-Buildings Assets 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.

Billing Type and Chartstring allocation information can be found on the campus specific Multi-Buildings Assets master list provided by the Reliability Engineer.
On the **PM Schedules** sub-tab,

11) **Add a Chartstring** to the PM Schedule:
   
e) **Enter the percentage** to be applied to the chartstring. If there are slight calculation errors due to rounding of percentages, adjust individual percentages until you reach 100%.
   
f) **Click Create** to save.

**INFORMATION**

Billing Type and Chartstring allocation information can be found on the campus specific Multi-Buildings Assets master list provided by the Reliability Engineer.
On the PM Schedules sub-tab,

11) Add a Chartstring to the PM Schedule:
   g) **REPEAT THIS STEP UNTIL ALL CHARTSTRINGS HAVE BEEN ENTERED**

**Information**

Billing Type and Chartstring allocation information can be found on the campus specific Multi-Buildings Assets master list provided by the Reliability Engineer.
12) Once the chartstrings have 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.

**General**

- **ID**: 1001528
- **Job Plan Name**: Mcgaw/Olson - Life Safety Infrastructure SWO 2742
- **Description**
- **Building**: Mcgaw/Olson
- **Building ID**: 8799
- **Assign Multiple Workgroups?**: No

**Primary Workgroup**

- **Name**: Zone 6 Contractor Exterminator

**PM Schedules**

- **Frequency**: MONTHLY
  - **Name**: Mcgaw/Olson - Life Safety Infrastructure Annual
  - **Type**: Schedule-Based
  - **Recurrence in month(s)**: 12 months
  - **Status**: Active
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.