



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)

Version	1.1	Release Date	03/04/2022
Owner	NU Facilities		
Version 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

Most Recent →	Version	Release Date	Action	Owner
	1.1	03/04/2022	Updated	NU Facilities
	1.0	11/15/2021	Created	NU Facilities
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	--	--	--	--



GETTING STARTED

- ❖ 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

PM Buildings & Categories 3.1 Chicago - Excel

1	Identifier	Equipment	Bldg No.	Start Month	BUILDING NAME	Zone	Shop	Asset IDs	Procedure Title	Monthly	Quarterly	Semi-Annual
2	8602 Fire Door	Fire Door	8602	7	Abbott Hall	6	Zone 6 Carpenter	40380, 39988,	door_fire_standard			
3	8602 VAV Box	VAV Box	8602	7	Abbott Hall	6	Zone 6 DDC	34304, 39977,	vav_standard			
4	8602 ATS #1 SWO 3970	ATS	8602	5	Abbott Hall	6	Zone 6 Electrical	34310	ats_asco	M-1000011		
5	8602 ATS #2 SWO 3971	ATS	8602	5	Abbott Hall	6	Zone 6 Electrical		ats_asco	M-1000011		
6	8602 Building Distribution SWO 2666	Building Distribution, Breaker	8602	7	Abbott Hall	6	Zone 6 Electrical	34312, 33793,	xbuilding_distribution	M-1000600		
7	8602 Fire Alarm Maintenance and Testing SWO 3918	Fire Alarm Control Panel	8602	7	Abbott Hall	6	Zone 6 Electrical		fire_alarm_control_panel_stand	M-1000647		
8	8602 Generator Testing #1 Abbott IT SWO 1774	Emergency Generator	8602	3	Abbott Hall	6	Zone 6 Electrical		emergency_generator_standard	M-1000533		
9	8602 Generator Testing #2 Abbott SWO 1775	Emergency Generator	8602	3	Abbott Hall	6	Zone 6 Electrical		emergency_generator_standard	M-1000533		
10	8602 GFI Testing SWO 4023	GFI Testing	8602	7	Abbott Hall	6	Zone 6 Electrical		XGFI	M-1000608		
11	8602 Grounding Maintenance WO623701	Grounding Maintenance	8602	1	Abbott Hall	6	Zone 6 Electrical		xgrounding_maintenance			
12	8602 Infrared Inspection WO605804	Infrared Inspection (switchboard)	8602	10	Abbott Hall	6	Zone 6 Electrical		xinfrared_inspection			
13	8602 KWH Meter Maintenance SWO 2766	Electrical Meter	8602	7	Abbott Hall	6	Zone 6 Electrical		Meter>Loading	M-1000643		
14	8602 Life Safety Infrastructure SWO 2739	Life Safety Infrastructure, Emergency	8602	7	Abbott Hall	6	Zone 6 Electrical	39924, 39926,	xlife_safety_infrastructure	M-1000617		
15	8602 Switchboard Room Inspection SWO 0204	Switchboard	8602	7	Abbott Hall	6	Zone 6 Electrical		switchgear_switchboard_standard	M-1000618		
16	8602 Switchgear Maintenance SWO 2976	Switchgear, Main Electrical	8602	7	Abbott Hall	6	Zone 6 Electrical		switchgear_switchboard_standard	M-1000618		
17	8602 Transformer Maintenance SWO 2754	Dry Transformer	8602	3	Abbott Hall	6	Zone 6 Electrical	33786, 33747,	xTransformer_Maintenance			
18	8602 UPS Maintenance SWO 3550	Emergency UPS	8602	7	Abbott Hall	6	Zone 6 Electrical	34252	ups_standard	M-1000644		
19	8602 Variable Frequency Drive SWO 2706	Variable Frequency Drive	8602	6	Abbott Hall	6	Zone 6 Electrical		vfd_standard			
20	8602 Air Handling Unit - AHU-1	Air Handling Unit	8602	2	Abbott Hall	6	Zone 6 Engineer	33764	airhandler_generic		Q-1000299	
21	8602 Air Handling Unit - AHU-15	Air Handling Unit	8602	2	Abbott Hall	6	Zone 6 Engineer	34242	airhandler_generic		Q-1000299	
22	8602 Air Handling Unit - AHU-SF-1	Air Handling Unit	8602	2	Abbott Hall	6	Zone 6 Engineer	34295	airhandler_generic		Q-1000299	
23	8602 Air Handling Unit - Elevator Unit	Air Handling Unit	8602	2	Abbott Hall	6	Zone 6 Engineer	33750	airhandler_generic		Q-1000299	
24	8602 Booster Pump	Booster Pump	8602	7	Abbott Hall	6	Zone 6 Engineer	34291, 34292,	pump_centrifugal			Q-1000
25	8602 Chiller	Chiller	8602	7	Abbott Hall	6	Zone 6 Engineer	34255, 34286	chiller_reciprocating			A-1000
26	8602 Condensate Pump	Condensate Pump	8602	7	Abbott Hall	6	Zone 6 Engineer	33842	pump_centrifugal			Q-1000
27	8602 Condenser	Condenser	8602	10	Abbott Hall	6	Zone 6 Engineer	33770, 33771,	acunit_splitsystem		Q-1000355	Q-1000
28	8602 Evaporator	Evaporator	8602	7	Abbott Hall	6	Zone 6 Engineer	39942, 39952,	acunit_splitsystem			S-1000
29	8602 Exhaust Fan	Exhaust Fan	8602	7	Abbott Hall	6	Zone 6 Engineer	33822, 33824,	exhaust-return_fan_unit_standard		Q-1000385	
30	8602 Fan Coil Unit	Fan Coil Unit	8602	7	Abbott Hall	6	Zone 6 Engineer	40299, 40301,	fan_coil_unit_standard			S-1000
31	8602 Supply Fan	Supply Fan	8602	7	Abbott Hall	6	Zone 6 Engineer	33828, 33827,	exhaust-return_fan_unit_standard		Q-1000385	
32	8602 Window AC Unit	Window AC Unit	8602	4	Abbott Hall	6	Zone 6 Engineer	238, 40239, 40	ac_unit_friedrich			A-1000
33	8890 Indoor Air Handling Unit AHU-15	Air Handling Unit	8602	7	Abbott Hall	6	Zone 6 Engineer	34242	airhandler_generic		Q-1000299	
34	8890 Indoor Air Handling Unit - AHU-SF-1	Air Handling Unit	8602	7	Abbott Hall	6	Zone 6 Engineer	34295	airhandler_generic		Q-1000299	
35	8890 Indoor Air Handling Unit AHU-1	Air Handling Unit	8602	7	Abbott Hall	6	Zone 6 Engineer	33764	airhandler_generic		Q-1000299	

Building Charged | BldgSched | Procedures Transfer | SupervisorFrequency | Progress Tracking | S ...

PROCESS



▼ PROCESS

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**.

► INFORMATION

☰

Northwestern | FACILITIES CONNECT

Home

Requests

Projects

Tasks

1

Maintenance

Inventory

Portfolio

Home

Reminders - Tasks

Notices

My Team's Tasks

Manage Tasks

Key Work Task

Material Order Task

Schedule Task

All Tasks

Home

My Active Tasks

Task ID	Task Name	Task Description	Task Type	Request Class	Task Prior
WT-1058356	COVID WASTEWATER MANAGMENT FY21 FACILITIES COVID CHARTSTRING APPROVED PER SCHAPS...	Hello Mary Pat, Please can a Facilities Connect Work Task be created for non-ca...	Planned	COVID-19	Import
WT-1065572	WT-1065572 - Scheduled Work, 2020 Ridge, PM Corrective Maintenance	test :	Corrective	PM Corrective Maintenance	Schedu Work

My Task History

No data to display.

My Organization's Active Tasks

Task ID	Task Name	Request ID	Request Class	Priority	Req
WT-1044613	WT-1044613 - Medium, Ryan Hall, General Repairs & Maintenance		General Repairs & Maintenance	Medium	

My Bookmarks

Job Cost Facilities...

Job Cost User Rep...

O&M Reports



▼ PROCESS

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>>

► INFORMATION

Northwestern | FACILITIES CONNECT

Home

Requests

Projects

Tasks

Maintenance

Preventive Maintenance

Plan Work

Generate Work

Inventory

Portfolio

Home

Reminders - Tasks

My Active Tasks

My Task History

My Organization's Active Tasks

Notices

My Team's Tasks

My Tasks

Create Task

Create Unavailable Time

All Tasks

Manage Tasks

Key Work Task

Material Order Task

Schedule Task

All Tasks

Task ID

Task Name

Task Description

Task Type

Request Class

Task Priority

Task ID

Task Name

Request ID

Request Class

Priority

Request

WT-1058356

COVID WASTEWATER MANAGEMENT FY21 FACILITIES COVID CHARTSTRING APPROVED PER SCHAPS...

Hello Mary Pat, Please can a Facilities Connect Work Task be created for non-ca...

Planned

COVID-19

Import

WT-1065572

WT-1065572 - Scheduled Work, 2020 Ridge, PM Corrective Maintenance

test :

Corrective

PM Corrective Maintenance

Scheduled Work

No data to display.

WT-1044613

WT-1044613 - Medium, Ryan Hall, General Repairs & Maintenance

General Repairs & Maintenance

Medium

My Bookmarks

Job Cost Facilities...

Job Cost User Rep...

O&M Reports

Billed Labor Detail Report

Incurred Labor Detail Rep

Work Order Audit Report

Job Cost Summary and De

All Tasks by Resource

Daily Work Orders Report

EVCUST and CHCUST Oper

Time Entries Pending Appr

Campus Mapping



▼ PROCESS

4) Click on the **Add** button.

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

► INFORMATION

Northwestern | FACILITIES CONNECT

Plan Work

Add to Bookmarks

My Bookmarks

Job Plans

Apply Filters

Clear Filters

4

Add

☐	!	Building ID	Building Name	Job Plan Name	Job Plan ID	Description	Primary Workgroup	Status
		Contains	Contains	Contains	Contains	Contains	Contains	Contains
☐	▼	8864	1201 Davis	1201 Davis Contract...	886499		Evanston PM Contractor	Active
☐	▼	8854	1800 Sherman	1800 Sherman Cont...	885499		Evanston PM Contractor	Active
☐	▼	8838	1801 Hinman	1801 Hinman Contr...	883899		Evanston PM Contractor	Active
☐	▼	8920	1801 Maple	1801 Maple Contrac...	892099		Evanston PM Contractor	Active
☐	▼	1808	Anderson Hall	1808 Backflow Prev...	1000842		Zone 5 Engineer	Revision In Pr
☐	▼	8744	1808 Chicago	1808 Chicago Contr...	874499		Evanston PM Contractor	Active
☐	▼	8745	1809 Chicago	1809 Chicago Contr...	874599		Evanston PM Contractor	Active
☐	▼	8756	1810 Hinman	1810 Hinman Contr...	875699		Evanston PM Contractor	Active
☐	▼	8746	1810/12 Chicago	1810/12 Chicago C...	874699		Evanston PM Contractor	Active

Items per page: 50

1 - 50 of 1175 items

1 of 24 pages



▼ PROCESS

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.

► INFORMATION

PM Building and Category master list:

▪ **Building Name** – column E

▪ **Asset/Category** – column B

▪ **SWO** – columns R-U

▪ **Building Number** – column C

Job Plan:

+

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft x

(Required): Job Plan Details.

- General

5a

ID

Status

* Job Plan Name

Description

5b

* Building

Building Name

Building Address

Assign Multiple Workgroups? ☐

- Primary Workgroup

Find

Clear

Update Task Assignment

Name

Assets

PM Schedules

Tasks

- Assets

Find

Remove

0 total found

! Image

ID

Asset Name

Status

Status Color

No data to display

Create Draft

x



▼ PROCESS

continued...

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

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

General

ID

Status

* Job Plan Name

McGaw/Olson - Life Safety Infrastructure SWO 2741

Description

* Building

\Locations\Chicago Campus\Mcgaw/Olson

Building Name

McGaw/Olson

Building ID

8799

Building Address

710 Fairbanks Ct

Assign Multiple Workgroups?

☐

Primary Workgroup

Find

Clear

Update Task Assignment

6c

OK

Cancel

Workgroups

Apply Filters

Clear Filters

Refresh

Star

Download

Workgroup Name	Short Name	Work Group Class
Contains	Contains	Contains
☐ Zone 5 Engineer	Z5ENG	Shop
☐ Zone 6 Carpenter	Z6CARP	Shop
☐ Zone 6 Contractor Custodian	Z6 Contract Custodian	Vendor
☒ Zone 6 Contractor Exterminator	Z6 Contract Elevator	Vendor
☐ Zone 6 Contractor Exterminator	Z6 Contract Exterminator	Vendor
☐ Zone 6 DDC	Z6DDC	Shop
☐ Zone 6 Electrician	Z6ELEC	Shop

Find

Remove

Show: 50



▼ PROCESS

continued...

On the **Assets** sub-tab,

7) Add the **Asset(s)**:

a) Click the **Find** button.

<<Upon clicking, the **Asset Search** screen will pop up>>

► INFORMATION

PM Building and Category master list:

- **Asset ID** – column H

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

General

ID

Status

* Job Plan Name

Mcgaw/Olson - Life Safety Infrastructure SWO 2741

Description

* Building

\Locations\Chicago Campus\Mcgaw/Olson

Building Name

Mcgaw/Olson

Building ID

8799

Building Address

710 Fairbanks Ct

Assign Multiple Workgroups?

☐

Primary Workgroup

Find

Clear

Update Task Assignment

Name

Zone 6 Electrician

Assets

Schedules

Tasks

Assets

7a

Find

Remove

0 total found

Show: 50

☐

! Image

ID

Asset Name

Status

Status Color

No data to display

Create Draft

x

Version 1.1

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▼ PROCESS

continued...

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.

▶ INFORMATION

PM Building and Category master list:

▪ **Asset ID** – column H

Job Plan:

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

Assets

Find

Remove

Show: 50

7d

OK ✓

Cancel x

Asset Records

7b

Apply Filters

Clear Filters

↺

☆

↓

	Image	Name	Asset ID	Specification Name	Spec Class	Brand	Primary Location
☐		Contains:	35454	Contains	Contain	Cont	Contains
7c ☒		Emergency ...	35454	Emergency Breaker Panel	ELECTRICAL		\\Locations\Chicago Campus\

Items per page: 50

1 - 1 of 1 items

1 of 1 pages



▼ PROCESS

continued...

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>>

► INFORMATION

PM Building and Category master list:

- **Procedure Title** – column I
- **Frequency** – columns J-O

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

- General

ID	Status
* Job Plan Name	Mcgaw/Olson - Life Safety Infrastructure SWO 2741
Description	
* Building	\Locations\Chicago Campus\Mcgaw/Olson
Building ID	8799
Building Name	Mcgaw/Olson
Building Address	710 Fairbanks Ct

Assign Multiple Workgroups? ☐

- Primary Workgroup

Find

Clear

Update Task Assignment

Name

Zone 6 Electrician

Assets

PM Schedules

Tasks

- PM Schedules

8a

Add

0 total found

Show: 50

☐ ! Frequency

Name

Type

Recurrence in month(s)

Status

No data to display

Create Draft

x



▼ 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

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

PM Schedule:

Print

Help

Create Draft

x

(Required): Preventive Maintenance Schedule Details.

- General

ID

Status

8b

Name

Description

- Detail

* Request Class

Building Charge PM Schedule

Service Plan

DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

8c

PM Type

Schedule-Based

Frequency

Create Recurring Pattern

- Billing Type

Add

Show: 50

Status



▼ 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 Patter Type** option, not the yearly option.

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

PM Event: 1001991

Print

Help

9d

Next

More

x

(Required):

Event Info

9a

* Start Date

04/01/2022 00:00:00

25

x

Select an Occurrence Type

Select the End Criteria

Single Occurrence

DAILY

WEEKLY

MONTHLY

YEARLY

Ad hoc

End After

End Date

9b

Monthly Recurrence

9c

Day (1-31)

1

of Every

12

Months to Skip (Seasonal)

January

February

March

April

May

June

July

August

September

October

November

December

Add

Show: 50

Status

Version 1.1

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▼ 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.

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

PM Event: 1001991

Print

Help

9e

Complete

x

(Optional): .

- Details

Offset Duration 0

25

 (allowable + or - date overlap when creating shadow occurrer)

- Select the Shadowing PM Schedules

Find

Remove

0 total found

Show: 10

!Frequency

Name

Service Plan

No data to display

Complete

x

- Detail

* Request Class

Building Charge PM Schedule

Service Plan

DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

PM Type

Schedule-Based

Frequency

Create Recurring Pattern

- Billing Type



▼ 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.

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

PM Schedule:

Print

Help

Create Draft

x

(Required): Preventive Maintenance Schedule Details.

- General

ID

Status

Name

Description

- Detail

10a

* Request Class

Building Charge PM Schedule

Service Plan

DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

PM Type

Schedule-Based

Frequency

Create Recurring Pattern

- Billing Type

Add

Show:

50

▼

Status



▼ 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.

► INFORMATION

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

Job Plan:

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

PM Schedule:

Print

Help

Create Draft

x

Preventive Maintenance Req...

10c

OK ✓

Cancel ✕

Apply Filters

Clear Filters

↺

☆

↓

!	Name	Service Class	Hierarchy Path
	Contains	Contains	Contains
10b	Building Charge PM Schedule	Facilities	\Classifications\Request Class\Buildin
☒	Intra-FM Charge PM Schedule	Facilities	\Classifications\Request Class\Buildin
☐	No Charge PM Schedule	Facilities	\Classifications\Request Class\Buildin
☐	Non Building Charge PM Schedule	Facilities	\Classifications\Request Class\Buildin

Frequency

Create Recurring Pattern

⊖

Billing Type

Add

Show: 50

Status



▼ PROCESS

continued...

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>>

► INFORMATION

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

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

PM Schedule:

Print

Help

X

Add

PM Schedule:

Print

Help

Create Draft

x

- Detail

* Request Class

Intra-FM Charge PM Schedule

Service Plan

DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

PM Type

Schedule-Based

Frequency

10d

Billing Type

Billing Type

Intra-FM

- PM Chart String(s)

0 total found

ID

Name

Description

Request Chart String

Chart String Status

Requested Percent

No data to display

0

11a

Add

Remove

- Billing Type



▼ PROCESS

continued...

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** information can be found on a master list provided by the Reliability Engineer.

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

PM Schedule:

Print

Help

Create Draft

x

(Required): Preventive Maintenance Schedule Details.

Request Chart String:

Print

Help

Create

x

(General): Required

General

* Request Chart String

11b

* Requested Percent

Chart String Status

Revenue Account Code

53595

Name

Description

Create

x

Billing Type



▼ PROCESS

continued...

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.

Job Plan:

General

Notes & Documents

Create Draft x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

PM Schedule:

Print Help

Create Draft x

(Required): Preventive Maintenance Schedule Details.

11d

OK ✓

Cancel x

Chart Strings

Apply Filters

Clear Filters

↺

☆

↓

	Chartstring	Fund Code	Dept ID	Project ID	Activity ID
11c	Contains	Contains	Contains	Contains	Contains
☒	160-1800000	160	1800000		
☐	160-1800099	160	1800099		
☐	160-1800200	160	1800200		
☐	160-1800300	160	1800300		

–

Billing Type

⌵



▼ 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.

► INFORMATION

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

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

PM Schedule:

Print

Help

Create Draft

x

Request Chart String:

Print

Help

11f

Create

x

(General): Required

- General

ID

Status

* Request Chart String

160-1800000

11e

* Requested Percent

Chart String Status

Active

Revenue Account Code

53595

Name

Description

Create

x

Create Recurring Pattern

- Billing Type



▼ PROCESS

continued...

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.

▶ INFORMATION

Job Plan:

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

PM Schedule:

12a

Create Draft

x

ID

Status

Name

Mcgaw/Olson - Life Safety Infrastructure Annual

Description

PM Schedule: 1001953

12b

Activate

Save

Save & Close

More

x

General

ID

1001953

Status

Draft

Name

Mcgaw/Olson - Life Safety Infrastructure Annual

Description



▼ PROCESS

continued...

On the **PM Schedules** sub-tab,

12) The PM Schedule will now appear on the Job Plan window.

▶ INFORMATION

Job Plan: 1001528

+

Add To Bookmarks

Print

?

Help

General

Notes & Documents

Activate

Save

Save & Close

More

x

(Required): Job Plan Details.

-

General

ID 1001528

Status Draft

* Job Plan Name

Mcgaw/Olson - Life Safety Infrastructure SWO 2742

Description

* Building

\Locations\Chicago Campus\Mcgaw/Olson

🔍

✕

Building Name Mcgaw/Olson

Building ID 8799

Building Address 710 Fairbanks Ct

Assign Multiple Workgroups?

☐

-

Primary Workgroup

Find

Clear

Update Task Assignment

Name

Zone 6 Electrician

Assets

PM Schedules

Tasks

-

PM Schedules

+

Add

🔍

Export

1 total found

Show: 50

12

!

Frequency

Name

Type

Recurrence in month(s)

Status

☐

MONTHLY

Mcgaw/Olson - Life Safety Infrastructure Annual

Schedule-Based

12 months

Active

Activate

Save

Save & Close

More

x



▼ PROCESS

continued...

On the **Tasks** sub-tab,

13) The individual Job Plan Work Tasks will populate.

► INFORMATION

Job Plan:

Add To Bookmarks

Print

Help

Create Draft

x

General

Notes & Documents

(Required): Job Plan Details.

General

ID

Status

★ Job Plan Name

123

Description

★ Building

\Locations\Chicago Campus\Ch - Heating Plant

Building Name

Ch - Heating Plant

Building ID

0511

Building Address

410 E Huron St

Assign Multiple Workgroups?

☐

Primary Workgroup

Find

Clear

Update Task Assignment

Name

Zone 6 Contractor Exterminator

Assets

PM Schedules

Tasks

Tasks

Re-Process Planned Tasks

Generate Work

13

Apply Filters

Clear Filters

↺

⚙

☆

⬇

☐	!	ID	Task Name	Type	Planned Start	Planned End	Status
		Contains	Contains	Contains	Equals	Equals	
☐		WT-1200450	- Every 12 Month(s)	Work Task	04/01/2022 14:04:06	04/01/2022 18:04:06	Planned
☐		WT-1200451	- Every 12 Month(s)	Work Task	04/01/2023 14:04:06	04/01/2023 18:04:06	Planned
☐		WT-1200452	- Every 12 Month(s)	Work Task	04/01/2024 14:04:06	04/01/2024 18:04:06	Planned
☐		WT-1200453	- Every 12 Month(s)	Work Task	04/01/2025 14:04:06	04/01/2025 18:04:06	Planned



▼ PROCESS

continued...

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.

► INFORMATION

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

PM Event: 1001991

Print

Help

(Required):

14d

Next

More

x

14a

Event Info

* Start Date

12/01/2021 12:00:00

25

x

Select an Occurrence Type

Select the End Criteria

14b

Single Occurrence

DAILY

WEEKLY

MONTHLY

YEARLY

Ad hoc

End After

End Date

* Recurrence Pattern Type

MONTHLY

Monthly Recurrence

Day [x] of every [x] month(s)

The [First] [Monday] of every [x] month(s)

14c

Day (1-31)

1

of Every

1

Month(s)

Months to skip (Seasonal)

January

February

March

April

May

June

July

August

September

October

November

December

Add

Show: 50

Status



▼ PROCESS

continued...

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.

▶ INFORMATION

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

PM Event: 1001991

Print

Help

Complete

x

(Optional): .

15a

Details

Offset Duration 0

25

x

(allowable + or - date overlap when creating shadow occurrer

Select the Shadowing PM Schedules

Find

Remove

15c

OK

✓

Cancel

PM Schedule - Query for Sha...

Add

Apply Filters

Clear Filters

↺

☐	!	Name	ID	Description	Status
15b ☒		McGaw/Olson - Life Safety Infrastructure Annual	1001953		Active

Billing Type

Version 1.1

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Page 25 of 31



▼ PROCESS

continued...

On the **PM Schedules** sub-tab,

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

d) Click the **Complete** button to save.

▶ INFORMATION

Job Plan:

Add To Bookmarks

Print

Help

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

Assets

PM Schedules

Tasks

PM Event: 1001996

Print

Help

15d

Complete

x

(Optional): .

- Details

Offset Duration

0

25

x

(allowable + or - date overlap when creating shadow occurrences)

- Select the Shadowing PM Schedules

Find

Remove

Export

1 total found

Show: 10

▼

☐	Frequency	Name	Service Plan
☐	MONTHLY	McGaw/Olson - Life Safety Infrastructure Annual	DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

Complete

x

Request Class

Building Change PM Schedule

Service Plan

DEFAULT - Preventive Maintenance - Create Task - PM Sch Org - Single Task

PM Type

Schedule-Based

▼

Frequency

Create Recurring Pattern

- Billing Type



▼ PROCESS

continued...

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.

▶ INFORMATION

Job Plan:

General

Notes & Documents

Create Draft

x

(Required): Job Plan Details.

PM Schedule:

16a

Create Draft

x

ID

Status

Name

Mcgaw/Olson - Life Safety Infrastructure Monthly

Description

PM Schedule: 1001954

16b

Activate

Save

Save & Close

More

x

(Required): Preventive Maintenance Schedule Details.

General

ID

1001954

Status

Draft

Name

Mcgaw/Olson - Life Safety Infrastructure Monthly

Description



▼ PROCESS

continued...

On the **PM Schedules** sub-tab,

17) BOTH the Annual and the Monthly PM Schedules will now appear on the Job Plan window.

▶ INFORMATION

Job Plan: 1001546

General

Notes & Documents

Activate

Save

Save & Close

More

x

(Required): Job Plan Details.

General

ID 1001546

Status Draft

★ Job Plan Name 123

Description

★ Building \Locations\Chicago Campus\Ch - Heating Plant

Building ID 0511

Assign Multiple Workgroups? ☐

Building Name Ch - Heating Plant

Building Address 410 E Huron St

Primary Workgroup

Find

Clear

Update Task Assignment

Name Zone 6 Contractor Exterminator

Assets

PM Schedules

Tasks

PM Schedules

Add

Apply Filters

Clear Filters

↺

☆

↓

☐	!	Frequency	Name	Type	Recurrence in month(s)	Status
☐		Contains	Contains	Contains	Equals	Contains
☐		MONTHLY	123	Schedule-Based	0 months	Draft
☐		MONTHLY		Schedule-Based	12 months	Active

Items per page: 10

1 - 2 of 2 items

1 of 1 pages



▼ PROCESS

continued...

On the **Tasks** sub-tab,

18) ALL Job Plan Work Tasks will populate and appear.

▶ INFORMATION

Job Plan: 1001546

General

Notes & Documents

Assets

PM Schedules

Tasks

Activate

Save

Save & Close

More

x

Name

Zone 6 Contractor Exterminator

Re-Process Planned Tasks

Generate Work

18

Apply Filters

Clear Filters

↺

⚙

☆

⬇

☐	!	ID	Task Name	Type	Planned Start	Planned End	Status
		Contains	Contains	Contains	Equals	Equals	
☐		WT-1200450	- Every 12 Month(s)	Work Task	04/01/2022 14:04:06	04/01/2022 18:04:06	Planned
☐		WT-1200451	- Every 12 Month(s)	Work Task	04/01/2023 14:04:06	04/01/2023 18:04:06	Planned
☐		WT-1200452	- Every 12 Month(s)	Work Task	04/01/2024 14:04:06	04/01/2024 18:04:06	Planned
☐		WT-1200453	- Every 12 Month(s)	Work Task	04/01/2025 14:04:06	04/01/2025 18:04:06	Planned
☐		WT-1200454	- Every 12 Month(s)	Work Task	04/01/2026 14:04:06	04/01/2026 18:04:06	Planned
☐		WT-1200455	- Every 12 Month(s)	Work Task	04/01/2027 14:04:06	04/01/2027 18:04:06	Planned
☐		WT-1200456	- Every 12 Month(s)	Work Task	04/01/2028 14:04:06	04/01/2028 18:04:06	Planned
☐		WT-1200457	- Every 12 Month(s)	Work Task	04/01/2029 14:04:06	04/01/2029 18:04:06	Planned
☐		WT-1200458	- Every 12 Month(s)	Work Task	04/01/2030 14:04:06	04/01/2030 18:04:06	Planned
☐		WT-1200459	- Every 12 Month(s)	Work Task	04/01/2031 14:04:06	04/01/2031 18:04:06	Planned

Items per page: 10

1 - 10 of 12 items

1 of 2 pages



▼ PROCESS

continued...

Once you have entered all information for the Job Plan,

19) Click **Activate**.

<<Upon clicking, the **Job Plan** screen will CLOSE>>

▶ INFORMATION

Job Plan: 1001546

General

Notes & Documents

19

Activate

Save Save & Close More x

(Required): Job Plan Details.

General

ID 1001546

Status Draft

★ Job Plan Name 123

Description

★ Building \Locations\Chicago Campus\Ch - Heating Plant

Building Name Ch - Heating Plant

Building ID 0511

Building Address 410 E Huron St

Assign Multiple Workgroups?

Primary Workgroup

Find Clear Update Task Assignment

Name Zone 6 Contractor Exterminator

Assets PM Schedules Tasks

Assets

Find Remove

Export 1 total found

Show: 50

	Image	ID	Asset Name	Status	Status Color	Parent Asset
☐		35454	Emergency Breaker Panel	Available		

19

Activate

Save & Close More x



▼ PROCESS

20) You will now be able to search for the Active Job Plan on the **Plan Work** screen.

▶ INFORMATION

Northwestern | FACILITIES CONNECT

Plan Work

Add to Bookmarks

My Bookmarks

Inline View

Add

Job Plans

Apply Filters

Clear Filters

Refresh

Star

Download

☐	!	Building ID	Building Name	Job Plan Name	Job Plan ID	Description	Primary Workgroup	Status
		Contains	Contains	Contains	Contains	Contains	Contains	Contains
☐	▼	8864	1201 Davis	1201 Davis Contract	886499		Evanston PM Contractor	Active
☐	▼	0511	Ch - Heating Plant	123	1001546		Zone 6 Contractor Exter...	
☐	▼	8854	1800 Sherman	1800 Sherman Cont...	885499		Evanston PM Contractor	Active
☐	▼	8838	1801 Hinman	1801 Hinman Contr...	883899		Evanston PM Contractor	Active
☐	▼	8920	1801 Maple	1801 Maple Contrac...	892099		Evanston PM Contractor	Active
☐	▼	1808	Anderson Hall	1808 Backflow Prev...	1000842		Zone 5 Engineer	Revision In Pr
☐	▼	8744	1808 Chicago	1808 Chicago Contr...	874499		Evanston PM Contractor	Active
☐	▼	8745	1809 Chicago	1809 Chicago Contr...	874599		Evanston PM Contractor	Active
☐	▼	8756	1810 Hinman	1810 Hinman Contr...	875699		Evanston PM Contractor	Active

Items per page: 50

1 - 50 of 1176 items

1 of 24 pages