



PREVENTIVE MAINTENANCE

JOB PLANS: MANUALLY RETIRE JOB PLANS

Provides guidance for retiring an Active Job Plan on Facilities Connect desktop.

▼ GETTING STARTED

This guide begins on the Plan Work screen. For more information on navigating to the Plan Work screen, refer to the **Setting Up a New Job Plan** manual.

DIRECTIONS:

1 From the Plan Work screen, locate the **Job Plan** that you want to retire:

1a Enter **key words** into the column search boxes.

1b Click on the **Job Plan** to open it.

The screenshot shows the 'Plan Work' interface with a table of Job Plans. A search box for 'Job Plan Name' is highlighted with 'life' entered. A row for 'McGaw/Olson - Life Safety...' is highlighted.

Job Plan Name	Job Plan ID	Description	Primary Workgroup	Status
Huron-St. Claire Parking ...	P10009		Zone 6 Electrician	Active
Levy Mayer Hall - Life Safe...	879608		Zone 6 Electrician	Active
Locksmith-Pancoe NSUHS...	1000407		Central Locksmith	Active
McGaw/Olson - Life Safety...	879907		Zone 6 Electrician	Active
Morton Medical Resea - LI...	879308		Zone 6 Electrician	Active
Pancoe NSUHS Life Scien...	883699		Evanston PM Contractor	Active
Simpson Querrey - Life Saf...	888605		Zone 6 Electrician	Active
Wieboldt Hall-Life Safety I...	1000992		Zone 6 Electrician	Active

2 Upon clicking, the **Job Plan** will open in a new window:

2a Click on **Revise** to edit the Job Plan.

The screenshot shows the 'Job Plan: 1001428' details window. The 'Revise' button is highlighted.

Job Plan: 1001428

General Notes & Documents

(Required): Job Plan Details.

General

ID 879907 Status Active

* 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? ☐



PREVENTIVE MAINTENANCE

JOB PLANS: MANUALLY RETIRE JOB PLANS

DIRECTIONS:

3

Once the Job Plan is in the Revise stage:

3a Click on the **PM Schedules** sub-tab.

3b Click on the first **PM Schedule** listed.

Job Plan: 1001428

General Notes & Documents

(Required): Job Plan Details.

General

ID 879907 Status Active

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

PM Schedules

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

Items per page: 10 1 - 2 of 2 items

4

Upon clicking, the PM Schedule window will open:

4a Click on the **More** button.

4b Click on the **Retire** option. Upon clicking, the PM Schedule window will close.

PM Schedule: 1001953

Save Save & Close More

(Required): Preventive Maintenance Schedule Details.

General

ID 1001953 Status Active

Name McGaw/Olson - Life Safety Infrastructure Annual

Description

Detail

Retire



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WORK TASKS: ENTER TIME ON BEHALF OF OTHERS

DIRECTIONS:

- 5
- Repeat Step 4 until all individual PM Schedules are Retired.

Job Plan: 1001428

General Notes & Documents

Revise Save More x

(Required): Job Plan Details.

General

ID 879907 Status Active

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

Name Zone 6 Electrician

Assets PM Schedules Tasks

PM Schedules

Apply Filters Clear Filters

Frequency	Name	Type	Recurrence in month(s)	Status
Contains	Contains	Contains	Equals	Contains

5

MONTHLY	McGaw/Olson - Life Safety Infrastruct...	Schedule-Based	12 months	Retired
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- 6
- On the Job Plan window,
- 6a Click on the **More** button.
- 6b Click on the **Retire** option. Upon clicking, the Job Plan window will close.

Job Plan: 1001428

General Notes & Documents

Activate Save Save More

Description

Building \Locations\Chicago Campus\Mcgaw/Olson Building Name McGaw/Olson

Building ID 8799 Building Address 710 Fairbanks Ct

Assign Multiple Workgroups? ☐

Primary Workgroup

Name Zone 6 Electrician

Assets PM Schedules Tasks

PM Schedules

Find Clear Update Task Assignment

Export 2 total found Apply Filters Clear Filters

Show: 50

Frequency	Name	Type	Recurrence in month(s)	Status
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WORK TASKS: ENTER TIME ON BEHALF OF OTHERS

DIRECTIONS:

- 7
- The Job Plan will now appear with the status **Retired**.

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Plan Work

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Job Plans

Apply Filters Clear Filters

	Building ID	Building Name	Job Plan Name	Job Plan ID	Primary Workgroup	Status
☐	8799	Contains	Contains	Contains	Contains	Contains
☐	McGaw/Olson	McGaw/Olson - Life Safety Infrastructure SWO 2741	879907	Zone 6 Electrician	Retired	
☐	8799	McGaw/Olson	McGaw/Olson - Transformer Main...	879911	Zone 6 Electrician	Active
☐	8799	McGaw/Olson	McGaw/Olson - 4th Floor Equipme...	879914	Zone 6 Engineer	Active
☐	8799	McGaw/Olson	McGaw/Olson - 4th Floor Equipme...	879915	Zone 6 Engineer	Active
☐	8799	McGaw/Olson	McGaw/Olson - 4th Floor Equipme...	879916	Zone 6 Engineer	Active
☐	8799	McGaw/Olson	McGaw/Olson - 4th Floor Equipme...	879917	Zone 6 Engineer	Active
☐	8799	McGaw/Olson	McGaw/Olson - 4th Floor Equipme...	879918	Zone 6 Engineer	Active
☐	8799	McGaw/Olson	McGaw/Olson - 4th Floor Equipme...	879919	Zone 6 Engineer	Active
☐	8799	McGaw/Olson	McGaw/Olson - AHU - INDOOR UN...	879920	Zone 6 Engineer	Active

Items per page: 50 1 - 44 of 44 items 1 of 1 pages