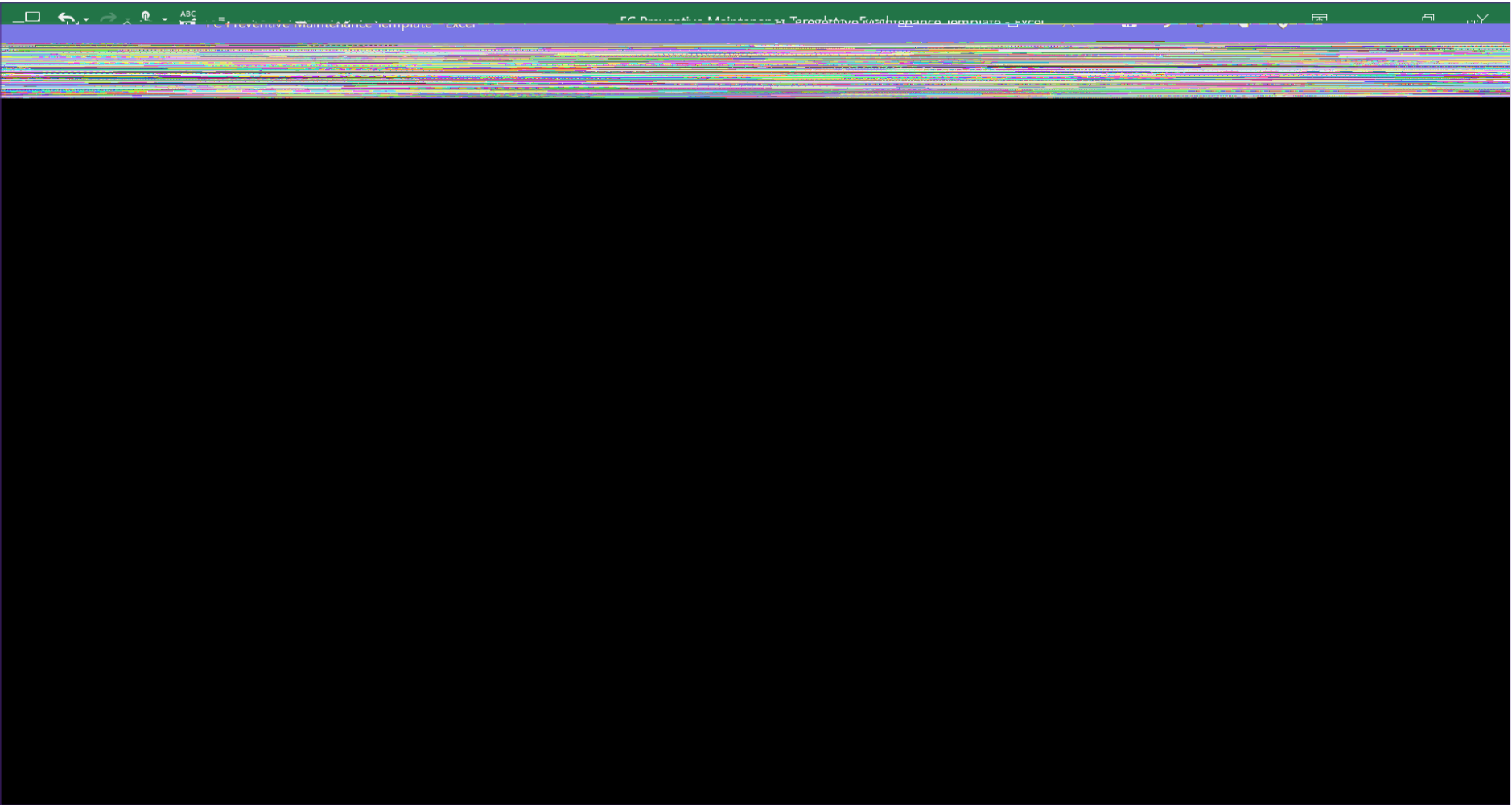


# Preventive Maintenance



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.



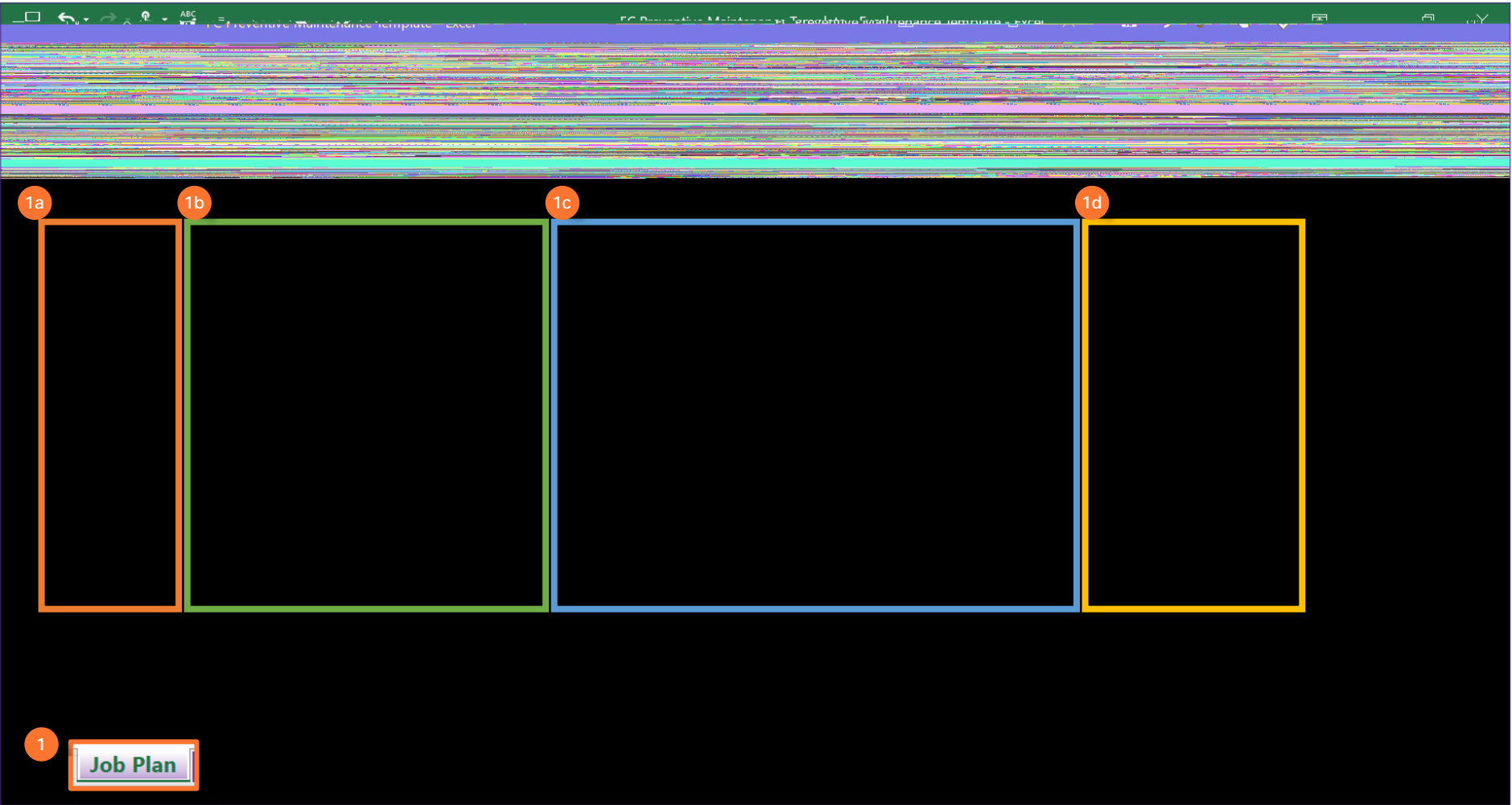
▶ PROCESS



PROCESS

To begin, open the FC Preventive Maintenance Template excel spreadsheet.

- 1) Start entering the information on the Job Plan tab (cont.):
  - c) **Building** – full building path pulled from Facilities Connect building record.
  - d) **Primary Workgroup** – the Workgroup that will complete the job plan.



▶ INFORMATION



## PROCESS

- 3) Next, enter the information on the **PM Schedule** tab:
- ID** – Job Plan ID number. Must match a number exactly from the previous two tabs.
  - 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.
  - 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.
  - 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.

## ▶ INFORMATION

The screenshot displays the 'PM Schedule' tab in an Excel spreadsheet. The spreadsheet is mostly black with eight columns, each outlined with a different colored border and labeled with a circled number from 3a to 3h. The labels are: 3a (orange), 3b (green), 3c (yellow), 3d (light green), 3e (blue), 3f (brown), 3g (grey), and 3h (pink). At the bottom center, there is a button labeled 'PM Schedule' with a '3' in a circle to its left. The spreadsheet title bar at the top reads 'FC Preventive Maintenance Template - Excel'.





## PROCESS

- 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](mailto:evan.goldstein@northwestern.edu)
  - b) He will verify form and send to NUIT to load into Facilities Connect.

 INFORMATION