

Indian Affairs, Division of Facilities  
Management and Construction

# Indian Affairs-Facility Management System (IA-FMS) Training

**O&M Work Orders**

# Lesson goals

- This lesson will cover the following specifics within IA-FMS (Maximo):
  - Create and properly maintain Maximo work orders.
  - Explain the primary work order fields and how they are used.
  - Explanation the work order status changes.
  - Standing Work Orders – The relationship between Maximo and FBMS.
  - Understanding the importance of tracking resources related to work orders. Things like: labor, and materials.

# Work Orders

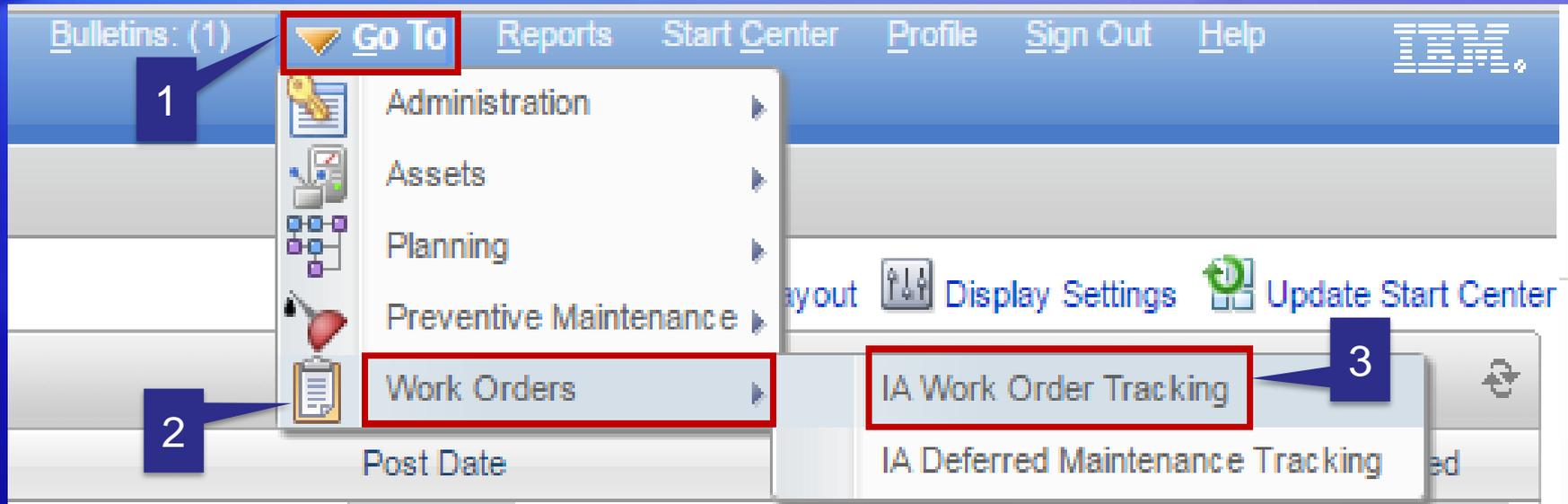
- Work Orders are used to capture estimated costs, as well as the actual cost of the work performed.
- Work Orders are the foundation on which the Total Cost of Ownership (TCO) is calculated.
- Work Orders are created based on 4 types of events:
  - Unscheduled Work: Response to emergency and corrective incidents.
  - Scheduled Work: Maintenance activities necessary to properly maintain and optimize the useful life of assets and locations.
  - Deferred Maintenance: Work that requires additional funding that is not covered by O&M funding.
  - Projects: Long term efforts that have a high cost.

# Standing Parent Work Orders

Are linked to the FBMS system through an interface.

- Each Site has 6 Categories of Standing Parent Work Orders:
  - **FO SO** – Facilities Operations Standing Order
  - **PS SO** – Protective Services Standing Order
  - **PM SO** – Preventive Maintenance Standing Order
  - **UM SO** – Unscheduled Maintenance Standing Order
  - **GM SO** – Grounds Maintenance Standing Order
  - **FM SO** – Facilities Maintenance Standing Order
- These work orders mirror an equivalent ‘Standing Parent Order’ in FBMS.
- These work orders cannot be modified by users.
- They are associated with each location and carry the correct FBMS line of accounting.
- O&M and PM work orders (Child Work Orders) inherit the correct FBMS accounting string once they are associated.

# Accessing the Work Order Application



1. Select 'Go To'.
2. Select 'Work Orders'.
3. Select 'IA Work Order Tracking'.

# Accessing the 'IA Work Order' Application

IA Work Order Tracking

Bulletins: (1) Go To Reports Start Center Profile Sign Out

Find: Select Action

List Work Order Plans Related Records Actuals Safety Plan Log Specifications

Advanced Search Save Query Bookmarks

Work Orders Filter 0 - 0 of 0

Work Order	Description	Structure #	Room #	Maximo ID	Location Type	Work Type	Status	FMIS Work Ticket
<input type="text"/>								

To find records, use the filter fields and then press Enter.  
For more search options, use the Advanced Search button.  
To enter a new record, select the Insert icon in the toolbar.

- **Work Order (#)** - Used to find a specific work order.
- **Description** - Search using the work order description.
- **Structure #** - Search for work orders using the structure number.
- **Room #** - Search for work orders using the room number.
- **Maximo ID** - Search work orders by using the Maximo location identifier.
- **Work Type** – Find work orders with a particular work type (i.e. 'FM').
- **Status** - Find work orders in a particular status (i.e. 'APPR').
- **FMIS Work Ticket** - Find work orders using the legacy FMIS Work Ticket number.

# Work Order – Creating an O&M Work Order

The screenshot displays the 'IA Work Order Tracking' application interface. At the top, there is a navigation bar with 'Bulletins: (1)', 'Go To', and 'Reports'. Below this is a search bar with 'Find:' and a 'Select Action' dropdown. A toolbar contains various icons, including a 'New Work Order' icon (1). The main form is divided into several sections: 'Work Order' (2) with fields for 'Work Order' (AB380058) and 'Site' (IE150); 'Description' (3) with a large text area; 'Location' (4) with 'Maximo ID' and 'Use' fields; 'Parent WO' (5) with a search field; and 'Work Type' (6) with a dropdown menu. Other fields include 'Location #', 'Location Type', 'Structure #', 'Asset', 'Configuration Item', 'Launch Entry Name', 'Parent WO', 'FMS Deficiency ID', 'Work Subtype', 'Category', 'Rank', 'Health Life Safety?', 'Severity', 'Probability', 'RAC', 'FMS Work Ticket', 'Fund', 'Functional Area', 'Funds/Cost Center', and 'WBS'. The interface is annotated with seven numbered callouts (1-7) pointing to specific actions and fields.

1. Click on 'New Work Order' icon.
2. Work Order number will auto populate.
3. Enter Work Order 'Description'.
4. Enter 'Maximo ID' (i.e. Location).

5. Enter 'Parent WO' (if applicable).
6. Enter 'Work Type'.
7. 'Save' the record.

# Job Plans (Technologies) – Relating to Work Orders

- A Job Plan is a detailed description of work that is to be performed on a work order.
- Job Plans generally contain tasks and information about the estimated labor and materials that are required for the work.
- Job Plans can be used on all types for work orders:
  - O&M
  - DM
  - PM
- Job Plan are a method to make sure that repetitive maintenance tasks performed the same way anytime the maintenance procedure is required.

# Attaching a Job Plan a Work Order

Find:  Select Action          

List Work Order Plans Related Records Actuals Safety Plan Log Specifications

Work Order:  \*  

Site:   

Location #:

Location Type:

\* Maximo ID:  >>  

Use:

Structure #:

Asset:  >>  

**Job Details**

>>

Job Plan Revision #:

PM:  >>

Safety Plan:  >>

Unit of Measure:  

Quantity:

# Attaching a Job Plan a Work Order

1. Select the Detail Menu Icon next to the 'Job Plan' field.
2. Click on 'Select Value'.

3. Make sure this box is unchecked.
4. Select 'Refresh'
5. Select 'Job Plan' number.

Job Details

Job Plan:   1

Job Plan Revision #:

PM:  >>

Safety Plan:  >>

Unit of Measure:  2  Select Value

Quantity:   Go To IA Job Plans

Select Value

Show Job Plans for the Work Order's Asset and Location Only?  3

Show Job Plans with No Classes Defined?

WO Class: Work Order  4

4

Filter >      1 - 15 of 1054   Download

Job Plan	Description	Template Type	Organization	Site
<input type="text"/> 5				
<a href="#">1068</a>	<a href="#">WEEKLY BOILER JOB PLAN</a>	<a href="#">MAINTENANCE</a>	<a href="#">OFMC</a>	-
<a href="#">1069</a>	<a href="#">MONTHLY BOILER JOB PLAN</a>	<a href="#">MAINTENANCE</a>	<a href="#">OFMC</a>	-
<a href="#">1070</a>	<a href="#">SEMI-ANNUAL BOILER JOB PLAN</a>	<a href="#">MAINTENANCE</a>	<a href="#">OFMC</a>	-

# Adding Planned Labor to a Work Order

IA Work Order Tracking

Bulletins: (1) Go To Reports Start Center Profile Sign Out Help

Find: Select Action

List Work Order Plans Related Records Actuals Safety Plan Log Specifications

Work Order: AB187082 \* empty garbage, vacume and emty recycle bins mop floor. was Site: IE087 Status: WAPPR

Parent WO:

Children of Work Order AB187082 Filter 0 - 0 of 0 Download

Tasks for Work Order AB187082 Filter 0 - 0 of 0 Download

Labor Materials Tools

Labor Filter 1 - 1 of 1 Download

Task	Craft	Skill Level	Vendor	Quantity	Labor	Regular Hours	Rate	Line Cost
				1		0:00		0.00

Details

Task: Vendor: \* Regular Hours: 0:00

Craft: Labor Contract: Rate:

Skill Level: \* Quantity: 1 Line Cost: 0.00

Labor: Labor: Rate Changed ?

Select Craft **New Row**

1. Make sure you are on the 'Plans' tab of Work Order Tracking application.
2. The work order must be in 'WAPPR' Status.
3. Select 'New Row'.
4. Click on the Menu Detail icon (next to the 'Craft' field) and click on 'Select Value'.

# Adding Planned Labor – Selecting a Craft

Work Order Tracking

Bulletins: (1) Go To Reports Start Center Profile Sign Out Help

BMXAA4205I - Record has been saved.

Find: [ ] Select Action [ ]

List Work Order Plans Related Records Actuals Safety Plan Log Specifications

Work Order: AB187082 \* empty garbage, vacume and emty recycle bins mop floor. was Site: IE087 Status: WAPPR

Parent WO: [ ]

Children of Work Order AB187082 Filter [ ] 0 - 0 of 0 Download

Tasks for Work Order AB187082 Filter [ ] 0 - 0 of 0 Download

Labor Materials Tools

Labor Filter [ ] 1 - 2 of 2

Task	Craft	Skill Level	Vendor	Quantity	Labor	Regular Hours	Rate	Line Cost
ACMECH				1		2:00	21.00	42.00
	CARP			1		3:00	19.21	57.63

Select Craft New Row

1. Select a 'Craft' code. A 'Craft' code reflects the type of qualification needed to perform the work (i.e. 'CARP' = Carpenter)
2. Enter (Estimated hour(s) to perform the work) into the 'Regular Hours' field.
3. Click on 'Save'.

# Adding Planned Materials

IA Work Order Tracking

Bulletins: (1) Go To Reports Start Center Profile Sign Out Help

Find: Select Action

List Work Order Plans Related Records Actuals Safety Plan Log Specifications

Work Order: AB187082 empty garbage, vacume and emty recycle bins mop floor. was Site: IE087 Status: WAPPR

Parent WO: >>

Children of Work Order AB187082 Filter 0 - 0 of 0

Tasks for Work Order AB187082 Filter 0 - 0 of 0

Labor Materials Tools

Materials Filter 1 - 1 of 1

Task	Item	Description
		Trash Bags

Task: Item: \* Trash Bags

\* Line Type: Material

\* Quantity: 1.00

Order Unit:

\* Unit Cost: 0.00

Line Cost: 0.00

Vendor: Stock Category: Condition Code: Condition Rate: Condition Enabled?

Required Date: 06/01/2016 1:43 PM

Requested By: KMERRILL

Select Materials Search Catalogs Select Asset Spare Parts **New Row**

1. Make sure you are on the 'Plans' tab of the 'IA Work Order Tracking' application.
2. The work order must be in 'WAPPR' Status.
3. Click on 'New Row'.
4. Change 'Line Type' from 'Item' to 'Material'.
5. Enter the 'Material' 'Description'.
6. Enter 'Quantity'
7. Enter 'Unit Cost'.
8. 'Save' the record.

# Changing the Status of a Work Order

The screenshot shows the IA-FMS software interface. The main window displays work order details for 'AB350118' with the description 'Replace steel exterior main doors to building 528'. A 'Change Status' dialog box is open, showing the current status as 'WAITING ON APPROVAL (WAPPR)'. The 'New Status' dropdown menu is open, and 'APPROVED (APPR)' is selected. The 'OK' button is highlighted. Four numbered callouts (1, 2, 3, 4) indicate the steps: 1. Click on the Change Status icon. 2. Select the down arrow for 'New Status'. 3. Select 'APPROVED (APPR)'. 4. Select 'OK'.

1. Click on the Change Status icon.

2. Select the down arrow for 'New Status'.

3. Select 'APPROVED (APPR)'.

4. Select 'OK'

# The Work Log Tab

IA Work Order Tracking

Bullets: (1) Go To Reports Start Center Profile Sign Out Help

Find: Select Action

List Work Order Plans Related Records Log Specifications

Work Order: AB187082 \* empty garbage, vacume and emty recycle bins mop floor. was Site: IE087 Status: WAPPR

Work Log Communication Log

Work Logs Filter 1 - 1 of 1 Download

Record	Class	Created By	Date	Type	Summary	Viewable?
AB187082	WORKORDEF	KMERRILL	06/01/2016 2:05 PM	CLIENTNOTE		<input type="checkbox"/>

Details

Record: AB187082

Class: WORKORDEF

Created By: KMERRILL

Date: 06/01/2016 2:05 PM

\* Type: CLIENTNOTE

Viewable?

Summary: [Rich Text Editor]

Font Size Format None

New Row

1. Make sure you are on the 'Log' tab in IA Work Order Tracking application.
2. Click on 'New Row' to create a new Log entry.
3. Enter a 'Summary' Description
4. Enter additional 'Detail' (if needed)
5. 'Save' the record.

# Reporting Time & Labor

List Work Order Plans Related Records **Actuals** Safety Plan Log Specifications

Work Order: AB187082 emty garbage, vacume and emty recycle bins mop floor. was  
Parent WO:

Site: IE087 Status: APPR

Children of Work Order AB187082 Filter 0 - 0 of 0 Download

Tasks for Work Order AB187082 Filter 0 - 0 of 0 Download

Sequence	Task	Summary

Labor Materials Tools

Labor Filter 1 - 1 of 1

Task	Labor	Name
	BBYRE	Bill Byre

Labor

Task:  \* Labor: BBYRE >> Bill Byre

Details

\* Craft: CONTRACTO >> \* Start Date: 06/01/2016  
Skill Level:  >> Start Time:

\* Regular Hours: 2.00 Line Cost: 0.00  
\* Rate: 0.00

Outside Labor Premium Pay Charge Information

Outside?  Premium Pay Code:  GL Debit Account:   
Vendor:  >> Premium Pay Hours:  GL Credit Account:   
Contract:  >> Premium Pay Rate:  Location: AB215972 >>  
Revision:  Premium Rate Type:  Asset:  >>  
Memo:   
Recorded as Received:

Select Labor Select Planned Labor **New Row**

1. The work order must be in 'APPR' Status
2. Make sure you are on the 'Actuals' tab of the 'IA Work Order Tracking' application.
3. Select the Labor tab.
4. Click on 'New Row'.
5. Select a 'Labor' code.
6. Enter the time it took to perform the work in the 'Regular Hours' field.
7. 'Save' the record.

# Reporting Materials

List Work Order Plans Related Records **Actuals** Safety Plan Log Specifications

Work Order: AB187082 empty garbage, vacume and emty recycle bins mop floor. was Site: IE087 Status: APPR  
Parent WO: >>

Children of Work Order AB187082 Filter 0 - 0 of 0 Download  
Tasks for Work Order AB187082 0 - 0 of 0 Download

Labor **Materials** Tools

**Materials** Filter 1 - 1 of 1

Task	Item	Description
		Cinder Blocks

Details

Task:

Item:

\* Line Type: **Material**

Storeroom:

\* Site: IE087

Quantity: 200.00

\* Unit Cost: 1.79

Line Cost: 358.00

Bin:

Stock Category:

\* Entered By: KMERRILL

\* Actual Date: 06/02/2016 9:21 AM

Charge Information

Requisition:

Requisition Line:

Location: AB215972 Classroom, General

Asset:

Rotating Asset:

GL Debit Account:

GL Credit Account:

\* Transaction Type: ISSUE

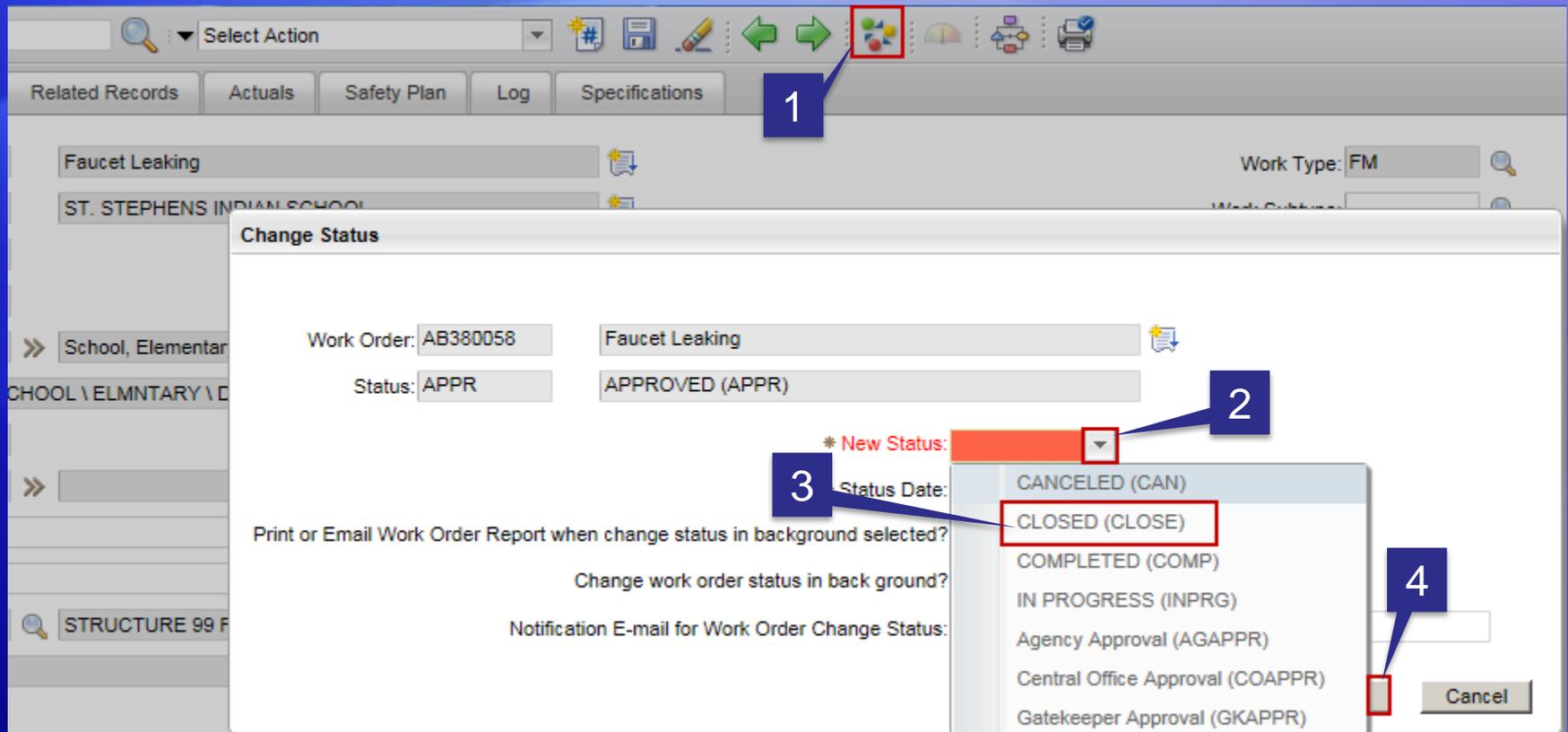
Outside?

Issued To:

Select Materials Select Reserved Items Select Asset Spare Parts **New Row**

1. Select the Materials tab.
2. Click on 'New Row'
3. Change 'Line Type' from 'Item' to 'Material'
4. Enter the 'Material' 'Description'.
5. Enter 'Quantity' (of the 'Material' needed).
6. Enter 'Unit Cost'. (of each unit of 'Material').
7. 'Save' the record.

# Closing Work Orders



1. Click on the multi-colored icon.

2. Select the down arrow for 'New Status'.

3. Select 'CLOSED (CLOSE)'.

4. Select 'OK'

# Updating Closed Work Orders

IA Work Order Tracking

More Search Fields| Current Query:

Work Order:

Description:

Parent WO:  >>

Maximo ID:  >>

Search Location Hierarchy:  >>

Structure #:

Room #:

Location #:

Location Type:  🔍

Asset:  >>

Configuration Item:

PM:  >>

FMIS Deficiency ID:

Problem Code:  🔍

Failure Class:  >>

Service Group:  >>

Service:  🔍

Vendor:  >>

Originating Record:  >>

Originating Record Class:  🔍

Risk Assessment:

FMIS Work Ticket:

Work Type:  🔍

Status: =CLOSE 🔍

Class: =WORKORDE 🔍

Site: =JS004 🔍

History?  🔍

Priority:

Task? N 🔍

Category:  🔍

Rank:  🔍

RAC:  🔍

Fund:

onal Area:

st Center:

WBS:

1. Click on 'Advanced Search'.

2. Remove the 'N' value from this field.

3. Select the Status of 'CLOSE'.

4. Click on 'Find'.

Plan Details

Job Plan:  >> Plan Craft:  >>

Safety Plan:  >> Plan Materials:  >>

Assigned Labor:  >> Plan Services:  >>

Reported By:  >> Lead:  >>

On Behalf Of:  >> Owner:  >>

Supervisor:  >> Owner Group:  >>

Find Restore Application Defaults Revise Cancel

# Updating Closed Work Orders

The screenshot displays the 'Work Order' details page in the IA-FMS system. The 'Select Action' dropdown menu is open, showing various options. The 'Edit History Work Order' option is highlighted with a red box. A blue callout box with the number '1' points to the dropdown arrow, and another blue callout box with the number '2' points to the 'Edit History Work Order' option.

Work Order: AB207484    Deficiency Set: [ ]  
Site: IE150    ST. STEPHEN  
Location #: C58-10  
Location Type: 1100  
Maximo ID: AB101287    School, Eleme  
Use: BUILDING \ SCHOOL \ ELMNTAR  
Structure #: 99  
Asset: [ ]    [ ]  
Configuration Item: [ ]  
Launch Entry Name: [ ]  
Parent WO: [ ]    [ ]  
FMIS Deficiency ID: 6649685

Job Details

Select Action

- Workflow
- Change Status
- Apply SLAs
- View SLAs
- Select/Deselect SLAs
- Create
- View
- Create Job Plan from Work Plan
- Remove Work Plan
- Select Safety Hazards
- Remove Safety Plan
- Apply Route
- Enter Meter Readings
- Report Downtime
- Assign to New Parent
- Move/Modify Assets
- Modify/Delete Work Log
- Edit History Work Order**
- Select Owner
- Take Ownership

1. Click on the 'down arrow' next to the 'Select Action' field.
2. Select 'Edit History Work Order'.

# Updating Closed Work Orders

Find: [ ] Select Action [ ]

3

List Work Order Plans Related Records Actuals Safety Plan Log Specifications

Work Order: AB207484 \* Deficiency Sequence - 1 REPLACE WATER COOLER, WAL

Site: IE150 ST. STEPHENS INDIAN SCHOOL

Location #: C58-10

Location Type: 1100

Maximo ID: AB101287 >> School, Elementary, Day 2

Use: BUILDING \ SCHOOL \ ELMNTARY \ DAY

Structure #: 99

Asset: >>

Configuration Item: >>

Launch Entry Name: >>

Parent WO: [ ]

FMIS Deficiency ID: 6649685

\* Work Type: FM

Work Subtype: [ ]

Category: [ ]

Rank: [ ]

Health Life Safety? [ ]

Severity: [ ]

Probability: [ ]

RAC: [ ]

FMIS Work Ticket: 2

Fund: [ ]

Functional Area: [ ]

Funds/Cost Center: [ ]

WBS: [ ]

Attachments [ ]

Status: CLOSE 1

Status Date: 06/08/2016 8:44 AM

Inherit Status Changes? [checked]

Is Task? [ ]

FBMS Relevant? [ ]

FBMS Status: NONE

1. The Work Order 'Status' remains 'CLOSE'.
2. The fields outlined in RED can now be updated.
3. The information on the 'Actuals' tab which contains information on 'Labor' and 'Materials' tab can also be updated.

# Creating 'Follow Up' Work Orders

The screenshot displays the 'IA Work Order Tracking' application interface. The 'Select Action' dropdown menu is open, showing various options. The 'Create' option is highlighted with a red box, and the 'Work Order' option is also highlighted with a red box. Three numbered callouts (1, 2, and 3) indicate the steps: 1. Click on the 'down arrow' next to the 'Select Action' field. 2. Select 'Create'. 3. Select 'Work Order'. The background shows a form with fields for Work Order ID (AB210623), Site (IE150), Location # (C58-10), Location Type (1100), Maximo ID (AB101287), Use (BUILDING \ SCHOOL \ ELMNTARY), Structure # (99), Asset, Configuration Item, Launch Entry Name, Parent WO, and FMIS Deficiency ID (6656704).

1. Click on 'down arrow' next to the 'Select Action' field.

2. Select 'Create'.

3. Select 'Work Order'.

# Demo and Exercises

O&M Work Orders