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’.

IA-FMS - O&M Work Orders
Accessing the ‘IA Work Order’ Application

- **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.
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

Work Order: AB350118
Site: IE121
Location #: N32-07
Location Type: 1100
Maximo ID: AB102853
Use: BUILDING \ SCHOOL \ ELMNTARY \ DAY
Structure #: 528
Asset:

Job Details

Job Plan:

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.

IA-FMS - O&M Work Orders
1. Make sure you are on the ‘Plans’ tab of Work Order Tracking application.
2. The work order must be in ‘WAPPR’ Status.
4. Click on the Menu Detail icon (next to the ‘Craft’ field) and click on ‘Select Value’.
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’.

IA-FMS - O&M Work Orders
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

1. Click on the Change Status icon.
2. Select the down arrow for ‘New Status’.
3. Select ‘APPROVED (APPR)’.
4. Select ‘OK’.

IA-FMS - O&M Work Orders
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.
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.
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 multicolored icon.
2. Select the down arrow for ‘New Status’.
3. Select ‘CLOSED (CLOSE)’.
4. Select ‘OK’
1. Click on ‘Advanced Search’.
2. Remove the ‘N’ value from this field.
3. Select the Status of ‘CLOSE’.
4. Click on ‘Find’.
1. Click on the ‘down arrow’ next to the ‘Select Action’ field.
2. Select ‘Edit History Work Order’.
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

1. Click on ‘down arrow’ next to the ‘Select Action’ field.
2. Select ‘Create’.
3. Select ‘Work Order’.

IA-FMS - O&M Work Orders
Demo and Exercises

O&M Work Orders