

O&M Work Orders Training Manual

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1 Work Orders

1.1 Objectives

- Understand how to create and properly maintain Maximo work orders.
- Be familiar with the primary work order fields and how they are used.
- Explain the work order status changes.
- Understand the relationship between Maximo and FBMS as it relates to work orders.
- Explain how parent/child work orders are to be used.
- Use the IA Deferred Maintenance Work Order Tracking Application.
- Understand how to track resources related to work orders - labor, material, and tools.

1.2 Introduction to the Work Order

A work order is a request for work to be performed. Work Orders constitute the heart of any Asset Management System. The use of manual Work Orders and Preventive Maintenance (PM) procedures pre-date the existence of computers by many years. One of the goals of the IA--FMS (Maximo) system deployment to provide maintenance personnel with ready access to the entire work history of specific assets and locations, including a history of individual work tasks performed, required safety procedures, labor, material and tool resources to complete a task or assignment. Ultimately, providing IA and DFMC with an improved understanding of the total cost of ownership for the entire asset portfolio.

The information contained on a work order includes the tasks performed, labor hours or services required for the work, materials and tools needed to do the work, and the assets worked on, or locations where the work was performed.

The screenshot displays the 'IA Work Order Tracking' application interface. At the top, there is a navigation bar with options like 'List', 'Standing Parent WO', 'Work Order', and 'Specifications'. Below this, a search bar and a toolbar with various icons are visible. The main content area is divided into several sections:

- Work Order Details:** Fields include Work Order (AB107672), Site (IE121), Location # (N32-07), Maximo ID (AB102850), Use (BUILDING \ PUMPHS), Structure # (506), Asset, Configuration Item, Launch Entry Name, Parent WO, and FMIS Deficiency ID.
- Work Type and Status:** Work Type (RPFO), Work Subtype, Category, Rank, Health Life Safety?, Severity, Probability, RAC, FMIS Work Ticket (167A2100DD), Fund (A0E350062.CI), Functional Area (AADD32N070), WBS, Status (APPR), Status Date (11/02/2012 10:21 AM), Inherit Status Changes? (checked), Is Task? (unchecked), FBMS Relevant? (checked), and FBMS Status (RELEASED).
- Job Details:** Fields for Job Plan, Job Plan Revision #, PM, Safety Plan, Unit of Measure, and Quantity.
- Priority:** Fields for Priority, Asset/Location Priority, and Priority Justification.
- Scheduling Information:** Fields for Target Start, Target Finish, Scheduled Start, Scheduled Finish, Predecessors, Actual Start, Actual Finish, Duration (0:00), and Time Remaining.
- Follow-up Work:** Fields for Originating Record and Has Follow-up Work? (unchecked).
- Responsibility:** Fields for Reported By (MAXADMIN), Reported Date (11/02/2012 10:21 AM), On Behalf Of, Phone, Supervisor, Crew, and Vendor.

To optimize current and future asset purchases, a Total Cost of Ownership figure needs to be developed for these assets including a proper allocation of initial purchase as well as ongoing maintenance costs. Work orders are the foundation on which the Total Cost of Ownership figure is calculated.

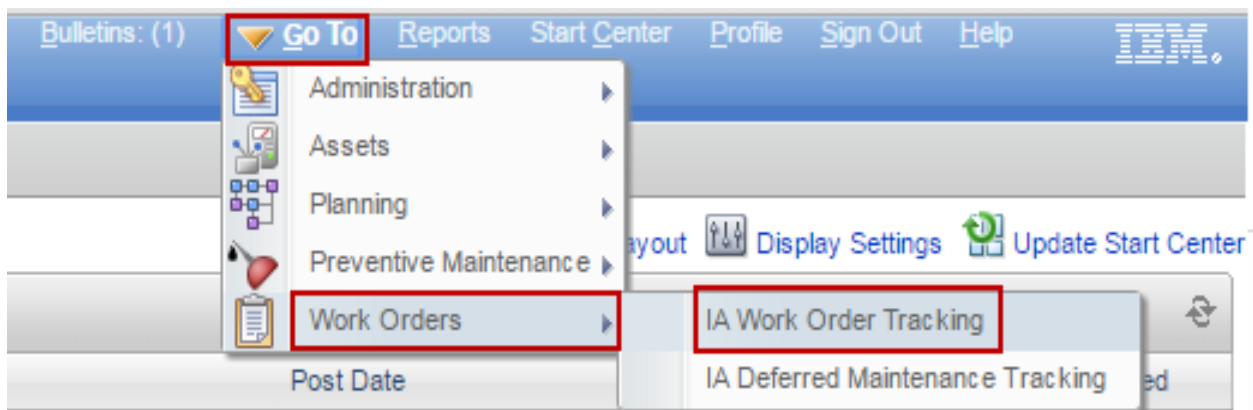
Work Orders are initiated into Maximo from four sources. First, they may be created as a response to emergency and corrective incidents; Second, they may be for periodic maintenance activities necessary to properly maintain and optimize the useful life of Assets and Locations; Third, they may be created via a Deferred Maintenance business process; and lastly, they may be derived from a project or directly created as a component or activity of a project. Work Orders within Maximo are used for planning work and resource needs, as well as tracking work performed and past events.

1.3 Accessing the Work Order Application

Work Orders within the IA-FMS (Maximo) system are accessed from the **GoTo** menu or directly from the Start Center under the **Favorite Applications**. In the system, the work order application is called **IA Work Order Tracking**. Since IA-FMS (Maximo) is shared with the IA DWP organization, which has different Work Order business processes, the standard, out-of-box Maximo work order application was cloned (copied), modified for DFMC use, and renamed **IA Work Order Tracking**. Only DFMC users have access to the IA Work Order Tracking application.

Navigating to IA Work Order Tracking

- 1) Click on the **Go To** menu icon
- 2) Select **Work Order**
- 3) Select **IA Work Order Tracking**



Result: You will be taken to the List tab of the IA Work Order Tracking Application.

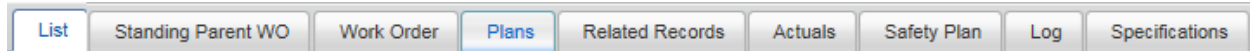
1.3.1 Work Order Tabs & Fields

At first glance, a work order within Maximo can seem overwhelming. Work Orders contain many data fields, in addition to the basic Work Order number, Location where work should occur, and the type of work. The data fields on the work order screen fall into two categories: required and recommended. Required fields are indicated by a red (*) asterisk and **red field shading**. Examples of required fields in a work order are Work Order Description, Work Type, and Maximo ID (location where work needs to take place).

The screenshot displays the Maximo Work Order Tracking interface. At the top, there is a navigation bar with 'List', 'Work Order', 'Plans', 'Related Records', 'Actuals', 'Safety Plan', 'Log', and 'Specifications' tabs. The main content area is divided into several sections:

- Work Order Details:** Includes fields for Work Order (AB401766), Site (IE121), Location #, Location Type, Maximo ID (highlighted in red), Use, Structure #, Asset, Configuration Item, Launch Entry Name, Parent WO, and FMIS Deficiency ID.
- Work Type and Attachments:** Includes Work Type (highlighted in red), Work Subtype, Category, Rank, Health Life Safety?, Severity, Probability, RAC, FMIS Work Ticket, Fund, Functional Area, Funds/Cost Center, WBS, Status (WAPPR), Status Date (07/11/2016 9:01 AM), Inherit Status Changes?, Is Task?, FBMS Relevant?, and FBMS Status (NONE).
- Job Details:** Includes Job Plan, Job Plan Revision #, PM, Safety Plan, Unit of Measure, and Quantity.
- Priority:** Includes Priority, Asset/Location Priority, and Priority Justification.
- Scheduling Information:** Includes Target Start, Target Finish, Scheduled Start, Scheduled Finish, Predecessors, Actual Start, Actual Finish, Duration (0:00), and Time Remaining.
- Follow-up Work:** Includes Originating Record and Has Follow-up Work?
- Responsibility:** Includes Reported By (TRAINER), Reported Date (07/11/2016 9:01 AM), On Behalf Of, Phone, Supervisor, Crew, and Vendor.

The work order is divided into multiple sections, each with a number of fields. The individual sections of a work order are organized using Tabs and Sub-tabs.



The IA Work Order Tracking Application has the following tabs:

- **List** - to search Maximo for work order records.
- **Standing Parent WO** – provides the summary cost information for a particular O&M area for a location.
- **Work Order** - to create, view, or modify work orders, view identifiers for an applied job plan and safety plan, view PM and scheduling information. If the work order is a follow-up work order, you can view the identifier of its originating work order. You also can identify the failure hierarchy for the work asset.
- **Plans** — to enter, view, or modify information on work orders in a hierarchy, and to enter, view, modify, or delete information about planned job tasks, labor, materials, services, and tools.
- **Related Records** — to add, view, or delete related ticket and work order records.
- **Actuals** — to enter, view, or modify actual work order start and finish times, labor hours and costs, material quantities, service costs, and tool costs.
- **Safety Plan** — to add, view, modify, or delete safety information associated with a work order.
- **Log** — to create, view, edit, and delete Work Log entries, and view Communication Log entries.
- **Specifications** – Currently not in use.

Below is a chart containing the main screen work order fields. There are a number of additional fields on each of the work order application tabs (e.g., Plans, Actuals, Standing Parent WO, etc.).

Table 3-1 – Main Screen Work Order Fields

Field	Description
Work Order	WO Number identifies the WO. Describes the work to be performed.
Site	Identifies the site for the work order (e.g., School, Agency)
Location #	The legacy location identifier for the Site (e.g., School, Agency) - from FMIS.
Maximo ID	Identifies the WO's location. The unique, auto-generated Maximo location identifier.
Structure #	The legacy Structure Number for each Maximo Location - from FMIS.
Asset	Identifies the WO's asset record (e.g., HVAC, Roof, Boiler, etc.)
Parent WO	Identifies the WO's parent. Often this is the Real Property Standing Order (RPFM, RPFO) linking the work to the accrued, actual costs from the FBMS system.
Work Type	Identifies the WO's type of work.
Work Subtype	Identifies the WO's sub-type of work (subset of work types).
Health Life Safety	If the work represents Health, Life, Safety issues.
Severity	Level of health risk resulting from exposure to HLS incident.

Field	Description
Probability	Likelihood that the HLS incident will occur.
RAC	Numerical expression of risk determined by severity and probability. Calculated field.
Funds / Cost Center	The FBMS line of accounting for the work order.
FMIS Work Ticket	Work Ticket identifier from FMIS (if Maximo work order originated in FMIS). Used to tie back to FMIS.
FMIS Backlog Number	FMIS Backlog number. Only found on Maximo work orders that were imported from approved FMIS backlogs. Used to tie back to FMIS.
Attachments	Link to document that has been associated with the WO
Status	Status of the WO, determines what functions can be done in the WO. Describes that current 'state' of the work order (e.g.,, waiting approval, in progress, approved, completed, closed, etc.).
Status Date	Date the WO status was last changed
Inherit Status Changes	Specifies whether the WO's status will change when its parent WO's status changes. This is defaulted to 'checked'.
Is Task?	Identifies this as a task work order.
FBMS Relevant?	Indicates if the work order is linked to a corresponding work order in FBMS. Will be checked for all Standing Orders.
Job Plan	Identifies the job plan associated with the work.
PM	Identifies the preventive maintenance record from which the WO was generated.
Safety Plan	Identifies the safety plan applied to the WO.
Priority	Identifies the importance of the WO.
Asset/Location Priority	Identifies the priority level copied from the asset/location record and used to schedule the work.
Priority Justification	Describes why the WO received the assigned priority.
Scheduled Start	Date & time the work is scheduled to begin.
Scheduled Finish	Date & time the work is scheduled to be completed.
Actual Start	Date & time actual work began. Populated when status is changed to In Progress.
Actual Finish	Date & time actual work was completed. Populated when status is changed to Completed.
Originating Record	Identifies the source WO record used to create the WO record.
Has Follow-up Work?	Specifies whether the WO has follow-up work and indicates a new WO has been created.
Reported By	Identifies the person reporting the WO.

Field	Description
<i>Reported Date</i>	Date & time the WO was reported.
<i>On Behalf Of</i>	WO is to be completed on behalf of (person, division, organization).
<i>Phone</i>	Phone number of person making the WO request.
<i>Supervisor</i>	Supervisor of the work.
<i>Crew</i>	Identifies the crew assigned to the WO.
<i>Vendor</i>	Identifies the vendor responsible for the work.

1.4 Fields Important to IA Work Management Business Processes

It is important that IA users have a basic understanding of each field in the work order application. However, some fields are more important than others. Below is a listing of the work order fields that are most critical to the IA Work and Asset Management Business Processes. Additionally, it is important to understand the relationship between Maximo and FBMS as it relates to work order - as explained in the Parent WO and 'FBMS Relevant?' sections.

1.4.1 Work Type and Sub Type

These two fields are important for national reporting requirements as well as building a link between asset management plan documents and work planned and accomplished. Also critical to understanding the type of work accomplished over the course of a fiscal year across the different types of assets within the portfolio.

1.4.2 Work Status

Every work order is assigned a status based upon the work that has been done. A work order must be in 'APPR' (Approved) or 'INPRG' (In Progress) status in order to record actuals. Work order status can only be changed by a user with appropriate user security. A work order that has Actuals recorded cannot be canceled; the record must be closed if it is no longer active.

Work Order Statuses		
Equivalent To		
Waiting Approval	WAPPR	Initial, default status for all work orders when first created. Work cannot begin in this status. Work Order only accepts "Planned" resources.
Approved	APPR	Approved. Work can begin. The work order accepts the recording of "actuals". Work order no longer accepts new plans or edits to plans.
Approved	WMATL	Waiting for Materials. Work Orders are automatically set to this status if work order contains Misc. Materials or Direct issue materials.
Approved	WSCH	Waiting scheduling. Typically this is the default status for work order that are generated from the PM module. The work is technically 'Approved' but is awaiting scheduling. Once scheduled (resources are added), the status can change to APPR or INPRG.
In Progress	INPRG	Work is in progress (underway).
In Progress	COMP	Completed. Work has been completed. Work order is still open for charges and finalization of actuals.
Closed	CLOSE	Work Order is closed. All data recorded to the work order. In this status the work order becomes read-only for all users. It is technically a historical record at this status.

Work Order Statuses		
Closed		

1.4.3 Parent WO (RPFMs & RPFOS)

The parent work order (Parent WO) in Maximo is the link to the FBMS system. The parent work order is known by its work type 'RPFM' (Real Property Facility Maintenance) or 'RPFO' (Real Property Facility Operations). These work orders are pre-created, aligned with an equivalent 'Standing Order' in FBMS, and loaded into the Maximo system. Parent work orders have special characteristics and cannot be directly modified by users. These work orders are associated with each location and carry the correct FBMS line of accounting. When children work orders are associated with the parent work order, the child order inherits the correct FBMS accounting string.

The screenshot displays the 'IA Work Order Tracking' application interface. At the top, there is a navigation bar with 'Buletins: (3)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a search bar with 'Find:' and 'Select Action' dropdowns, and a toolbar with various icons. The main content area is divided into several sections:

- Work Order Details:** Includes fields for Work Order (AB105586), Location # (CS2-02), Maximo ID (AB101072), Structure # (I-1), FBMS ID, Site (JS004), Work Type (RPFM), Work Subtype, Status (APPR), Status Date (11/02/2012 9:41 AM), FBMS Status (RELEASED), and Is FBMS Relevant? (checked).
- Specifications:** Shows 'STRUCTURE I-1 UM SO' and 'Law Enforcement, Detention Center, Adult'.
- FBMS Fund Information:** A sidebar panel containing fields for FBMS Order #, Fund (167A2100DD), Functional Area (ADJ380502.C), Funds/Cost Center (AAKLC03100), and WBS.
- Actual Cost:** A section with multiple input fields for cost categories: Total Cost, Construction Cost, Utilities Cost, Fuel Cost, Transportation Cost, Relocation Cost, Foreign Travel Cost, Non Foreign Travel Cost, Stewardship Cost, Heritage Cost, Labor Cost, Material Cost, Service Cost, and Tool Cost.
- Footer:** Shows 'Children of Work Order AB105586', a 'Filter' button, and a 'Download' button.

All cost data passed from the FBMS system is collected at the parent work order level within Maximo. Costs are not further distributed "down" to the child work orders. The accumulated costs are lumped at the Parent WO. The children work orders within Maximo provide IA asset managers with finer details on how and where the work order costs are being expended. Parent Work Orders (RPFMs and RPFOS) have a dedicated tab within the IA Work Order Tracking application (as shown in the above screenshot) to assist users in managing these work orders over the course of a fiscal year.

When viewing parent work orders (aka standing orders) from within a child work order, note the six categories into which it falls, as shown below.

Work Order: AB350118
 Site: IE121
 Location #: N32-07
 Location Type: 1100
 * Maximo ID: AB102853
 Use: BUILDING \ SCHOOL \ ELMN
 Structure #: 528
 Asset:
 Configuration Item:
 Launch Entry Name:
 Parent WO:
 FMIS Deficiency ID:

Worum	Description	Work Type	Maximo ID	Structure #	Status
AB309622	STRUCTURE 1 GM SO	RPFM	AB105796	1	APPR
AB313837	STRUCTURE 1 PM SO	RPFM	AB105796	1	APPR
AB316318	STRUCTURE 1 UM SO	RPFM	AB105796	1	APPR
AB317727	STRUCTURE 1 FM SO	RPFM	AB105796	1	APPR
AB312635	STRUCTURE 1 FO SO	RPFO	AB105796	1	APPR
AB315113	STRUCTURE 1 PS SO	RPFO	AB105796	1	APPR

Attachments
 Status: WAPPR
 Status Date: 04/17/2015 4:17 PM
 Inherit Status Changes?
 Is Task?
 FBMS Relevant?
 FBMS Status: NONE

- **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

1.4.4 FBMS Relevant?

The **FBMS Relevant?** field is checked, indicating the Parent Work Order exists in the FBMS system. Note also that the *Status* is in a perpetual state of approval (APPR) and cannot be edited by the user.

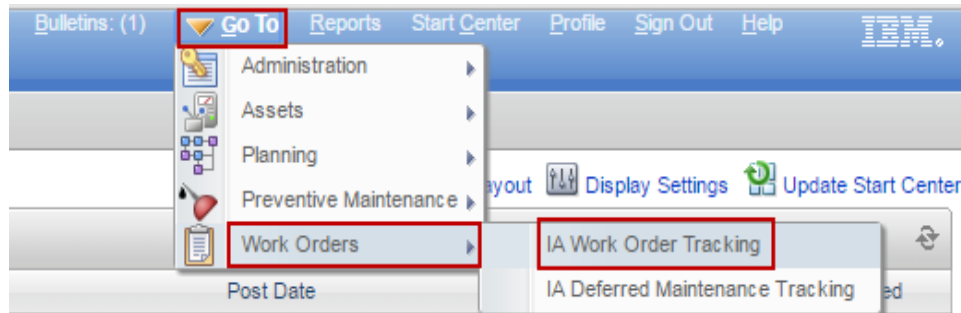
Work Order: AB101641
 Site: IE033
 Location #: N32-05
 Location Type: 1100
 Maximo ID: AB102816
 Use: BUILDING \ QUARTERS \ MULFAMHS
 Structure #: 310
 Asset:

Work Type: RPFM
 Work Subtype:
 Category:
 Rank:
 Health Life Safety?
 Severity:
 Probability:
 RAC:

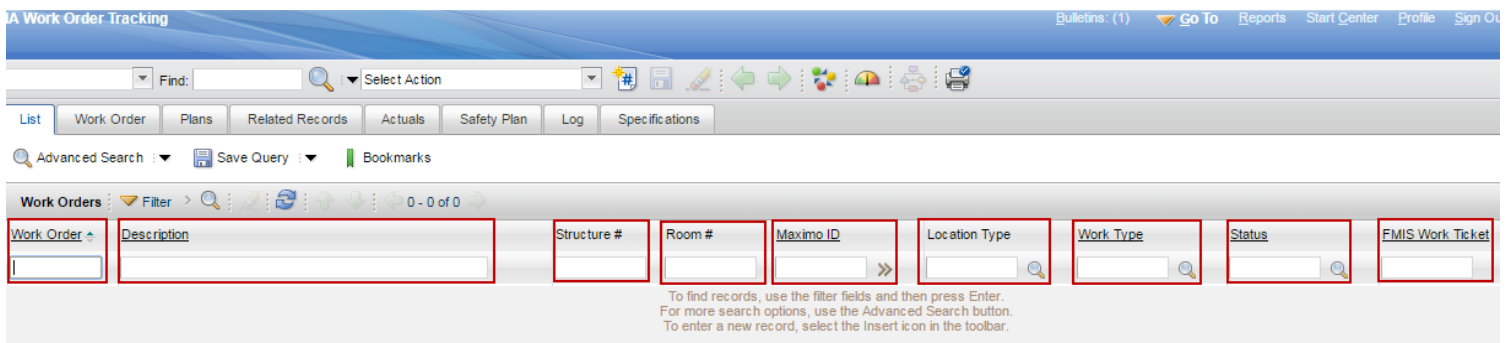
Attachments
 Status: APPR
 Status Date: 11/02/2012 9:11 AM
 Inherit Status Changes?
 Is Task?
FBMS Relevant?
 FBMS Status: RELEASED

1.5 Finding Work Orders

Work Orders can be assigned to laborers, supervisors, and groups. As such, it is important that you can locate work orders that are assigned to you. Work Orders are found in the **IA Work Order Tracking Application** within the **Work Orders Module**.



Keep in mind that every time you enter an application, you will be routed to the List Tab. The **List Tab** is used to conduct searches to find records (for detailed information on searching and querying see the related section of this guide).



The IA-FMS (Maximo) system provide pre-defined, searchable field on the List screen to assist you in finding individual work orders or a group of similar work. Notice that the **List Tab** of the IA Work Order Tracking Application has the following searchable fields:

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

A query can be conducted by entering information into a searchable field. (Note: You do not have to use all of the searchable fields.) For example, if you wished to find work orders for a given structure number, you would search using the STRUCTURE # field. Taking this further, if you wanted to find the work orders at this structure in a specific status, you would search using the STRUCTURE # *and* STATUS ID fields. Notice that the second search is more specific because you are narrowing the results to include only work orders at **Structure 'XXXX'** in **Status 'YYYY'**

More Search Fields | Current Query:

Work Order: <input type="text"/>	Problem Code: <input type="text"/> 🔍	Work Type: <input type="text"/> 🔍
Description: <input type="text"/>	Failure Class: <input type="text"/> »	Status: <input type="text"/> 🔍
Parent WO: <input type="text"/> »	Service Group: <input type="text"/> »	Class: =WORKORDE 🔍
Maximo ID: <input type="text"/> »	Service: <input type="text"/> 🔍	Site: =JS004 🔍
Search Location Hierarchy: <input type="text"/> »	Vendor: <input type="text"/> »	History? <input type="text"/> N 🔍
Structure #: <input type="text"/>	Originating Record: <input type="text"/> »	Priority: <input type="text"/>
Room #: <input type="text"/>	Originating Record Class: <input type="text"/> 🔍	Is Task? <input type="text"/> N 🔍
Location #: <input type="text"/>	Risk Assessment: <input type="text"/>	Category: <input type="text"/> 🔍
Location Type: <input type="text"/> 🔍	FMIS Work Ticket: <input type="text"/>	Rank: <input type="text"/> 🔍
Asset: <input type="text"/> »	Inspection Number: <input type="text"/>	RAC: <input type="text"/> 🔍
Configuration Item: <input type="text"/> »		Fund: <input type="text"/>
PM: <input type="text"/> »		Functional Area: <input type="text"/>
FMIS Deficiency ID: <input type="text"/>		Funds/Cost Center: <input type="text"/>
		WBS: <input type="text"/>

Plan Details		User Information	
Job Plan: <input type="text"/> »	Plan Craft: <input type="text"/> »	Reported By: <input type="text"/> »	Lead: <input type="text"/> »
Safety Plan: <input type="text"/> »	Plan Materials: <input type="text"/> »	On Behalf Of: <input type="text"/> »	Owner: <input type="text"/> »
Assigned Labor: <input type="text"/> »	Plan Services: <input type="text"/> »	Supervisor: <input type="text"/> »	Owner Group: <input type="text"/> »

Note: Querying Tips:

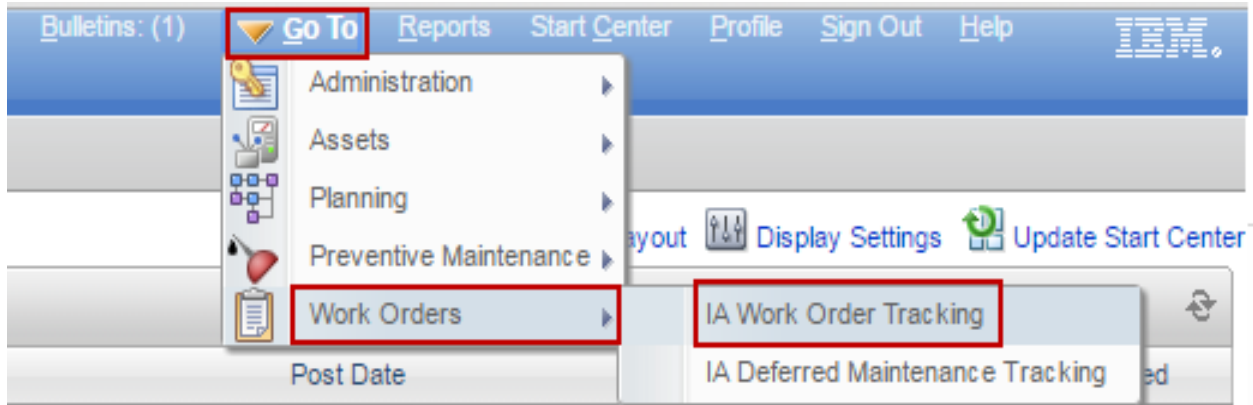
Start out general, and if the results are too large, narrow the scope of your search by adding additional field parameters and values using the **Advanced Search** feature (shown above).

1.6 Creating Work Orders

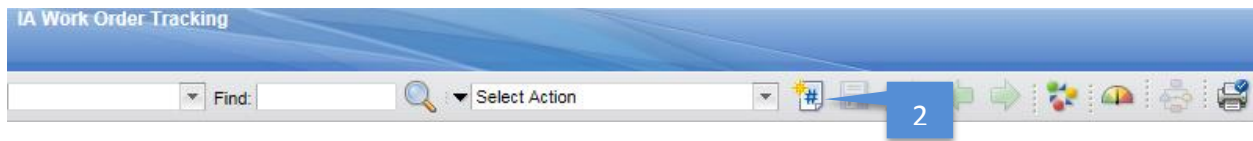
The **IA Work Order Tracking** application will be the most commonly be used for planning, tracking, and documenting work performed against locations and assets.

How to Create a Simple Work Order

- 1) Navigate to the **IA Work Order Tracking** Application.



- 2) Click on the **New Work Order** icon  located on the Toolbar.



- 3) A new work order record will open on the **Work Order** tab and a number of fields including the Work Order number, Site, Status, Status Date, Reported By, and Reported Date will automatically be populated.

The screenshot displays the 'IA Work Order Tracking' application interface. The main form is titled 'Work Order: AB401766' and is for 'RED ROCK DAY SCHOOL'. The interface includes a top navigation bar with 'List', 'Work Order', 'Plans', 'Related Records', 'Actuals', 'Safety Plan', 'Log', and 'Specifications' tabs. A toolbar at the top right contains icons for search, save, and other actions. The main form fields are organized into sections: 'Job Details', 'Priority', 'Scheduling Information', 'Follow-up Work', and 'Responsibility'. Numbered callouts (4-11) point to specific fields: 4 points to the 'Work Order' description field; 5 points to the 'Maximo ID' field; 6 points to the 'Structure #' field; 7 points to the 'Asset' field; 8 points to the 'Parent WO' field; 9 points to the 'Work Type' dropdown; 10 points to the 'Scheduled Start' and 'Scheduled Finish' date fields; and 11 points to the 'Save' icon in the toolbar.

- 4) Enter a brief description of the work to be accomplished in the field next to the work order number. Use the long description icon to enter the scope of the work statement or any additional text pertaining to the work.
- 5) Enter the Maximo ID (aka the Location).
- 6) Structure Number (if available).
- 7) Asset Number (if necessary).

Note: Each work order **must** be attached to a Maximo ID (location / structure #), or Asset. Each work order that is written should identify **only one** location / structure or asset record to maintain accuracy when quantifying actuals.

- 8) Select the appropriate RPFM or RPFO standing parent work order. This will establish the link with the FBMS system to track costs.
- 9) Enter the appropriate Work Type and Sub-type.
- 10) The Scheduled Start and Scheduled Finish dates are important for planning and reporting. Complete additional fields for greater planning and reporting options.
- 11) Click on the **Save** icon.

1.7 Attaching a Job Plan

A **Job Plan** is a template, with detailed descriptions of work to be performed on an asset, item, or location. If you use job plans you do not have to enter the same information every time you create a work order for similar work. A job plan can be applied to an unlimited number of work orders. After you apply a job plan to a work order, its resource estimates and tasks are copied into a work plan for the work order. You then can modify the work plan so that the procedures, labor, materials, services, and tools are more specific to the work order, without affecting the original job plan template.

You use the Job Plans application to create, view, modify, or delete job plan records. A job plan typically includes procedural descriptions and lists of estimated labor, items and materials, services, and tools to be used on the job. To ensure that a job plan is performed in a safe manner, you can add safety plan information to the job plan via the assets that use the safety plan.

A job plan that does not have an Organization or Site specified for it may be used on any work order. If the job plan has an Organization and/or Site specified, then it can only be used for work orders for that Organization or Site.

How to Attach a Job Plan to a Work Order

- 1) Within a work order, click on the **Detail Menu** icon **>>** field assistant next to the Job Plan field.
- 2) Click on **Select Value** to display the pop-up window with a list of available Job Plans.

The screenshot shows the 'Job Details' form. The 'Job Plan' field is highlighted with a red box and a blue callout '1'. A field assistant menu is open next to it, with the 'Select Value' option highlighted by a red box and a blue callout '2'. Other fields include 'Job Plan Revision #', 'PM', 'Safety Plan', 'Unit of Measure', and 'Quantity'.

- 3) Click on the Job Plan you wish to add.

The screenshot shows the 'Select Value' pop-up window. It contains a table of Job Plans with columns for Job Plan, Description, Template Type, Organization, and Site. The row for Job Plan 1070, 'SEMI-ANNUAL BOILER JOB PLAN', is highlighted with a red box and a blue callout '3'. The table also includes rows for 'WEEKLY BOILER JOB PLAN', 'MONTHLY BOILER JOB PLAN', and various visual inspection tasks.

Job Plan	Description	Template Type	Organization	Site
1068	WEEKLY BOILER JOB PLAN	MAINTENANCE	OFMC	-
1069	MONTHLY BOILER JOB PLAN	MAINTENANCE	OFMC	-
1070	SEMI-ANNUAL BOILER JOB PLAN	MAINTENANCE	OFMC	-
1071	ANNUAL BOILER JOB PLAN	MAINTENANCE	OFMC	-
IA_5093551	Exterior hardware - routine preventive maintenance	MAINTENANCE	OFMC	-
IA_5093552	Visual inspection: windows, wood/metal, interior/exterior, up to 24 feet	MAINTENANCE	OFMC	-
IA_5093553	Visual inspection: windows, wood or metal, interior or exterior, over 24' H	MAINTENANCE	OFMC	-
IA_5093554	Visual inspection: built-up roofs	MAINTENANCE	OFMC	-
IA_5093555	Visual inspection: roofs, aluminum, iron/steel, asbestos shingle, asphalt	MAINTENANCE	OFMC	-
IA_5093556	Visual inspection: asbestos, interior, all areas	MAINTENANCE	OFMC	-
IA_5093557	Fire Doors, Swinging	MAINTENANCE	OFMC	-

The Job Plan you selected will now appear in the Job Plan field of the work order. If you select **Go To > Job Plans**, you will have the ability to search the Job Plans application and return with the select.

Job Details

Job Plan: ➤

Job Plan Revision #: Select Value

PM: Go To Job Plans

Safety Plan: ➤

Unit of Measure: 🔍

Quantity:

If job tasks is unique to a work order, those tasks can be developed within the work order on the Plans tab without using the Job Plans application. This allows you to identify specific steps required to complete the task, including any labor hours, materials, or tools.

IA Work Order Tracking Bullets: (3) 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: AB401767 * ANNUAL BOILER JOB PLAN Site: IE121 Status: WAPPR

Parent WO: ➤

Children of Work Order AB401767 Filter > 0 - 0 of 0 Download

Tasks for Work Order AB401767 Filter > 1 - 6 of 32 Download

Sequence	Task Summary	Estimated Duration	Status	Owner	Owner Group	
10	CHECK FLAME SIGNAL STRENGTH FOR BOTH PILOT AN	0:00	WAPPR	➤	➤	🗑️
20	CHECK PILOT AND MAIN FUEL VALVE SHUTOFF VALVE	0:00	WAPPR	➤	➤	🗑️
30	CHECKK IGNITOR AND BURNER OPERATION	0:00	WAPPR	➤	➤	🗑️
40	CHECK LEVEL IN CHEMICAL TREATMENT TANK AND FII	0:00	WAPPR	➤	➤	🗑️
50	CHECK BOILER WATER TREATMENT TEST RESULTS AI	0:00	WAPPR	➤	➤	🗑️
60	LUBRICATE MOTORS AND EQUIPMENT BEARINGS	0:00	WAPPR	➤	➤	🗑️

New Row

1.8 Planning Crafts, and Material (Plans Tab)

The **Plans Tab** within the IA Work Order Tracking application is used to enter, view, or modify information on work orders in a hierarchy, and to enter, view, modify, or delete information about planned job tasks, crafts, and materials.

Note: Crafts describe the skill necessary for perform the work. Example: If you were building a shed you might need a person with the skill (i.e Craft) of a Carpenter. If a facet is leaking you would need the skill (i.e. Craft) of a Plumber.

Adding Planned Craft

- 1) Find the work order to which you will be adding planned labor. Remember, the work order status **must be** WAPPR. Once a work order is approve (APPR), planned labor, and materials cannot be added.
- 2) Select the **Plans** tab.

The screenshot displays the IA Work Order Tracking application interface. At the top, there is a search bar with the text "Find: AB401767" and a "Select Action" dropdown. Below the search bar are navigation tabs: List, Work Order, Plans, Review, Actuals, Safety Plan, Log, and Specifications. The "Plans" tab is highlighted with a red box and a blue callout labeled "2".

Below the tabs, there is a form with the following fields: Work Order: AB401806, * Replace Entry Door, Site: JS004, and Status: WAPPR. The "Status: WAPPR" field is highlighted with a red box and a blue callout labeled "1".

Below the form, there are two data tables. The first table is titled "Children of Work Order AB401806" and has columns for Sequence, Task, Summary, Estimated Duration, Status, Owner, and Owner Group. It contains the text "There are no rows to display." and a "New Row" button. The second table is titled "Tasks for Work Order AB401806" and has the same columns. It also contains the text "There are no rows to display." and a "New Row" button.

Below the tables, there are three sub-tabs: Labor, Materials, and Tools. The "Labor" sub-tab is highlighted with a red box and a blue callout labeled "3".

Below the sub-tabs, there is a data table titled "Labor" with columns for Task, Craft, Skill Level, Vendor, Quantity, Labor, Regular Hour, Rate, and Line Cost. It contains the text "There are no rows to display." and a "Select Craft" button. The "Select Craft" button is highlighted with a red box and a blue callout labeled "4".

- 3) Select the **Labor** sub-tab.
- 4) Click on **Select Craft**.


The screenshot shows a 'Select Craft' dialog box with a table of labor options. The table has columns for 'Craft', 'Skill Level', 'Vendor', 'Contract', and 'Standard Rate'. The 'Craft' column contains various job titles, and the 'Standard Rate' column shows numerical values. Two rows, 'CARP' and 'CUST', have their checkboxes selected. A blue callout box with the number '5' points to the 'CONTRACTOR' row, and another blue callout box with the number '6' points to the 'OK' button at the bottom right of the dialog.

<input type="checkbox"/>	Craft	Skill Level	Vendor	Contract	Standard Rate
<input type="checkbox"/>	ACMECH				
<input type="checkbox"/>	ADMINASST				15.00
<input type="checkbox"/>	ARCHDRAFT				
<input type="checkbox"/>	BOILEROP				
<input type="checkbox"/>	BUSINESSASST				
<input type="checkbox"/>	BUSINESSMGR				
<input checked="" type="checkbox"/>	CARP				19.21
<input type="checkbox"/>	CIVLENGR				
<input type="checkbox"/>	CONTRACTOR				
<input type="checkbox"/>	COSTEST				
<input checked="" type="checkbox"/>	CUST				14.50
<input type="checkbox"/>	CUSTOMNTBUS				0.00
<input type="checkbox"/>	CUSTOMNTHelp				9.00
<input type="checkbox"/>	DIRSPTSERV				
<input type="checkbox"/>	ELEC				22.75

- 5) Check the box(s) to select the Craft(s) that are planned for this work order.
- 6) Click **OK**.

The screenshot displays the IA Work Order Tracking application. At the top, there is a navigation bar with options like 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a search bar with 'Find: AB401767' and a 'Select Action' dropdown. A toolbar contains various icons, including a save icon highlighted by callout 9. The main area shows a work order for 'AB401806' with the task 'Replace Entry Door'. Below this are sections for 'Children of Work Order' and 'Tasks for Work Order', both showing 0 rows. The 'Labor' section is active, showing a table with columns for Task, Craft, Skill Level, Vendor, Quantity, Labor, Regular Hours, Rate, and Line Cost. Two rows are visible: one for 'CUST' and one for 'CARP'. Callout 7 points to the 'Quantity' field (value 1) in the 'CARP' row, and callout 8 points to the 'Regular Hours' field (value 3.00) in the same row. A 'Save' icon is also present at the bottom right of the labor table.

Task	Craft	Skill Level	Vendor	Quantity	Labor	Regular Hours	Rate	Line Cost
	CUST			1		2.00	14.50	29.00
	CARP			1		3.00	19.21	57.63

- 7) Enter the Craft Quantity (not required).
- 8) Enter the Regular Hours (not required).
- 9) Click on **Save** icon .

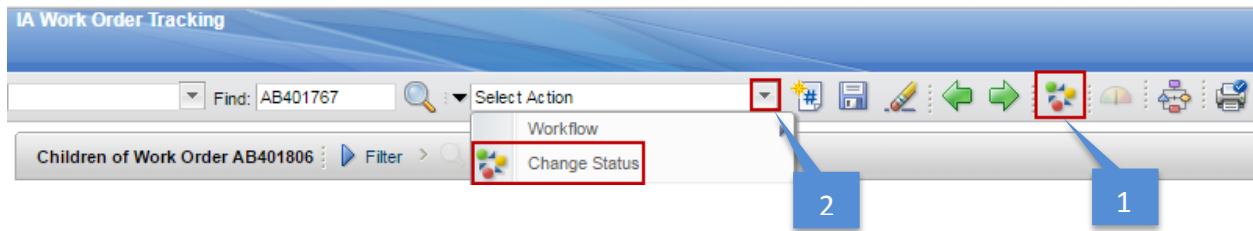
Adding Planned Material

- 1) Select the **Materials** sub-tab.
- 2) Select **New Row**.
- 3) Change the **Line Type** to "Material".
- 4) Enter a **Description** for the planned material.
- 5) Enter a **Quantity & Unit Cost**.
- 6) Click **Save**.


The screenshot displays the 'IA Work Order Tracking' application. At the top, there is a navigation bar with 'Bullets: (3)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a search bar containing 'Find: AB401767' and a 'Select Action' dropdown. The main content area is divided into sections: 'Children of Work Order AB401806', 'Tasks for Work Order AB401806', and 'Materials'. The 'Materials' section is active, showing a table with one row: '36x80 Solid Core Fiberglass Door' with a quantity of 1.00 and a unit cost of 287.00. Below the table is a 'Details' section with various input fields. Blue callout boxes with numbers 1 through 6 highlight specific UI elements: 1 points to the 'Materials' tab, 2 points to the 'New Row' button, 3 points to the 'Line Type' dropdown menu, 4 points to the 'Description' field, 5 points to the 'Quantity' and 'Unit Cost' fields, and 6 points to the 'Save' icon in the toolbar.

1.9 Changing the Status of a Work Order

Open the work order you wish to change. The work order will automatically save when you change status.



Access the Change Status window by:

- 1) Click on the Change Status icon . The Change Status window will pop up.
-- OR --
- 2) Click on the Select Action menu. Choose Change Status and the Change Status window will pop up.

- 3) Click on the pick list arrow of the **New Status** field.
- 4) Select the new work order status of '**APPR**'.
- 5) Click on the **OK** icon to accept the new status. The work order will save when the status is changed.

1.10 The Work Log Tab

Within the IA Work Order **Log Tab** is the **Work Log**, which is record-specific. This means that you must be in the specific record to see the work log and communication archives. The **Work Log** documents work issues without sending an email. This information can then be used to:

- Record completion of significant project milestones, or job tasks.
- Record client, or customer, interaction related to the job or task.
- Inform other workers of what tasks have been completed.

The screenshot displays the 'IA Work Order Tracking' application interface. At the top, there is a navigation bar with 'Bulleins: (3)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a search bar containing 'Find: AB401806' and a 'Select Action' dropdown. A menu bar includes 'List', 'Work Order', 'Plans', 'Related Records', 'Actuals', 'Safety Plan', 'Log' (highlighted with a red box), and 'Specifications'. The main content area shows 'Work Order: AB401430' with a description '531. Bath tub sealant for bottom cracks is breaking off expos', 'Site: IE121', and 'Status: APPR'. Below this, there are tabs for 'Work Log' and 'Communication Log'. The 'Work Logs' section shows a table with one entry:

Record	Class	Created By	Date	Type	Summary	Viewable?
AB401430	WORKORDEF	TRAINER	07/12/2016 10:26 AM	CLIENTNOTE		<input type="checkbox"/>

The 'Details' section for this record shows: Record: AB401430, Class: WORKORDEF, Created By: TRAINER, Date: 07/12/2016 10:26 AM, Type: CLIENTNOTE, and Viewable? . A rich text editor is visible for entering details, with a toolbar containing various formatting options like bold, italic, underline, and font color.

1.11 Reporting Labor, and Material (Actuals Tab)

The Actuals tab allows you to track labor, and materials used to accomplish work. This tab allows you to track the hours for a number of people against a single work order. The details of the work order will default for each row added.

Note: A work order **must be** in Approved (or similar) status in order for actuals to be reported. Check to ensure your work order is in the correct status before attempting to report actuals.

Adding Actual Labor

- 1) Click on the **Actuals** Tab.
- 2) Click on the appropriate sub-tab (labor, materials, or tools). In this case, **Labor** was selected.
- 3) Click on **New Row** button.
- 4) Enter a labor code into the **Labor** field; either type the code directly into the field or use the detail menu arrow. Once a labor code is added, the **Craft** field and **Rate** fields will automatically populate.
- 5) Type in the **Start Date**. If you are unsure of the correct date, use the calendar icon for assistance.
- 6) Type the hours worked into the **Regular Hours** field.
- 7) Save your work by clicking on the **Save** icon in the toolbar.

Note: If labor hours are entered incorrectly and you have saved the record, you will have to enter a new row with negative hours to adjust the entry.

Materials Tab

Materials can be planned and tracked in the IA Work Order Tracking application. On the plans tab you can plan to use either a Material or an Item. If you select an item it must be in your site's storeroom inventory. Selecting a "Material" line type when planning work will allow you to identify materials that are not in your site's storeroom inventory or in the item inventory (e.g., misc. material item). For sites that use "as needed" purchasing, such as credit card purchases, the material purchased can be documented as a **Line Type** of materials.

To document the material resources actually used for a work order, you will need to go to the Actuals tab and the Materials sub tab and then follow the steps below.

The screenshot displays the IA Work Order Tracking application interface. At the top, there is a navigation bar with tabs: List, Work Order, Plans, Related Records, Actuals, Safety Plan, Log, and Specifications. The 'Actuals' tab is selected. Below the navigation bar, the work order details are shown: Work Order: AB376652, Fire Door Inspection, Site: IA004, Status: APPR, and Parent WO: AB317093. A blue callout '6' points to the 'Specifications' icon in the top toolbar.


Below the work order details, there are sections for 'Children of Work Order AB376652' and 'Tasks for Work Order AB376652'. The 'Materials' sub-tab is selected, and a blue callout '1' points to the 'Materials' tab. The main table shows a single material line with the following details:

Task	Description	Transaction Type	Storeroom	Quantity	Bin
	36x80 Solid Core Fiberglass Door	ISSUE		1.00	

Below the table, the 'Details' section contains various fields for the material line. A blue callout '3' points to the 'Line Type' dropdown menu, which is set to 'Material'. A blue callout '4' points to the 'Description' field, which contains '36x80 Solid Core Fiberglass Door'. A blue callout '5' points to the 'Quantity' and 'Unit Cost' fields, which are set to '1.00' and '287.00' respectively. A blue callout '2' points to the 'New Row' button at the bottom right of the interface.

The 'Charge Information' section at the bottom includes fields for Requisition, Requisition Line, Location (AB104250), Asset, and Rotating Asset. It also includes fields for GL Debit Account, GL Credit Account, Transaction Type (ISSUE), and Issued To.

Adding a Line Type of Materials


- 1) Select the **Materials** Sub-tab.
- 2) Select **New Row**.
- 3) Using the pick list for the **Line Type**, select **Material**.
- 4) Enter a **Description** of the material in the item description field.
- 5) Enter **Quantity** and **Unit cost**.
- 6) Save the record with the **Save** icon .

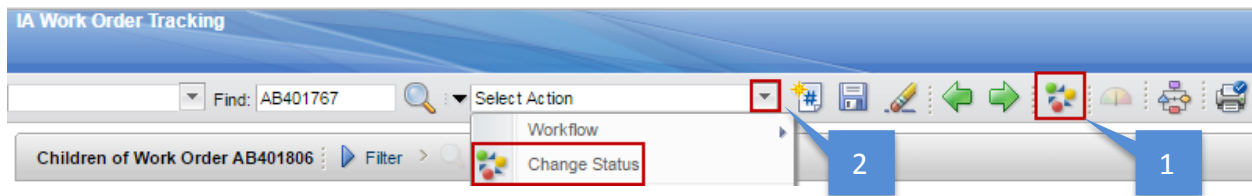
1.12 Closing Work Orders

While a work order is in progress, it is important that you communicate with stakeholders and are aware of the status of the job, including any problems your crew has encountered. Checking the Work Logs will help you catch up on work order-related correspondence.

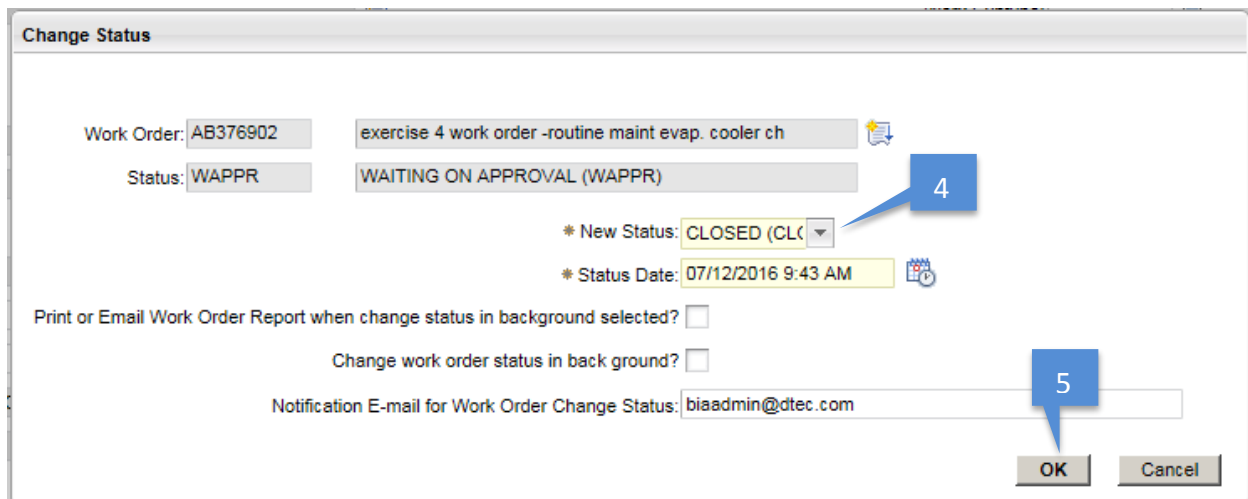
Before closing a work order, it is crucial to see that all actuals have been recorded. Take a moment to verify that the data is accurate and complete.

Access the Change Status window by:

- 1) Click on the Change Status icon .
- OR --
- 2) Click on the Select Action menu. Choose 'Change Status'.



- 3) The system will display the **Change Status** pop-up menu.



The 'Change Status' pop-up window displays the following information:

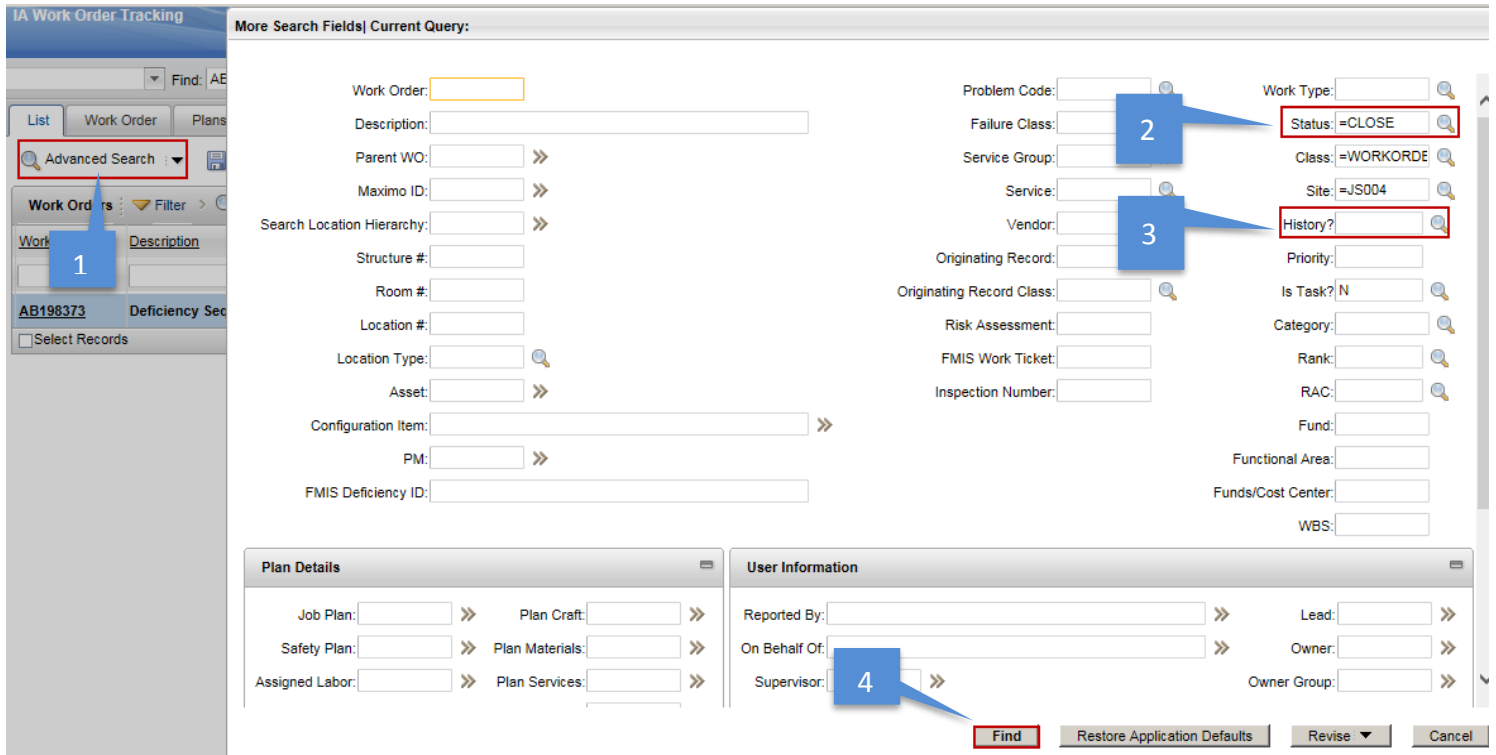
- Work Order: AB376902
- exercise 4 work order -routine maint evap. cooler ch
- Status: WAPPR
- WAITING ON APPROVAL (WAPPR)
- * New Status: CLOSED (CLC) (highlighted with a blue callout '4')
- * Status Date: 07/12/2016 9:43 AM
- Print or Email Work Order Report when change status in background selected?
- Change work order status in back ground?
- Notification E-mail for Work Order Change Status: biaadmin@dtcc.com (highlighted with a blue callout '5')
- Buttons: OK, Cancel

- 4) Select '**CLOSED (CLOSE)**' from the value list.
- 5) Click **OK** to make the status change to CLOSE.

In the event that a work order is closed before all information has been recorded, it is possible to edit the closed work order and make changes. See the section below that describes the process to find and edit closed work orders.

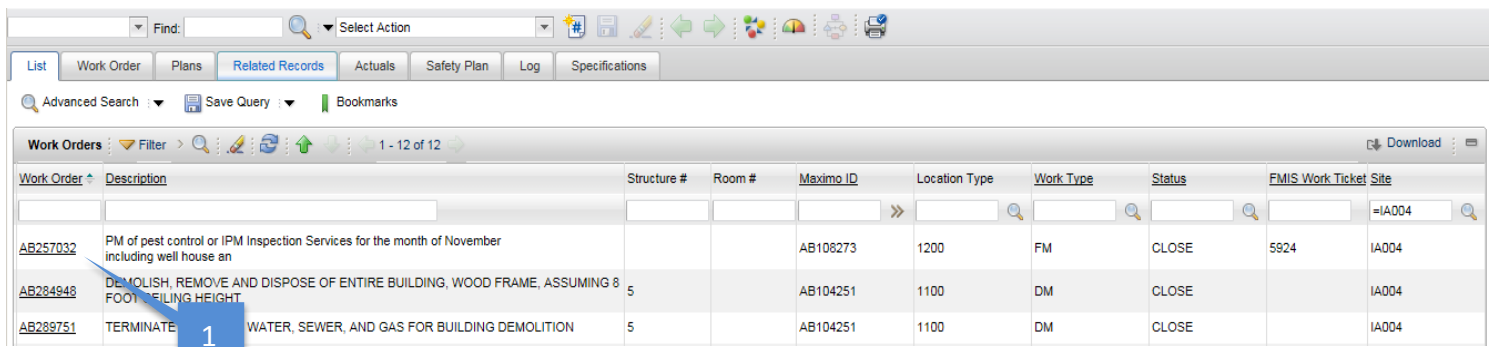
1.13 Finding and Editing Closed Work Orders

Occasionally work orders are closed before all labor, materials, services, and tools are documented. To edit these work orders you will first have to find them, since the default setting in the IA-FMS (Maximo) system is to search for active work orders.



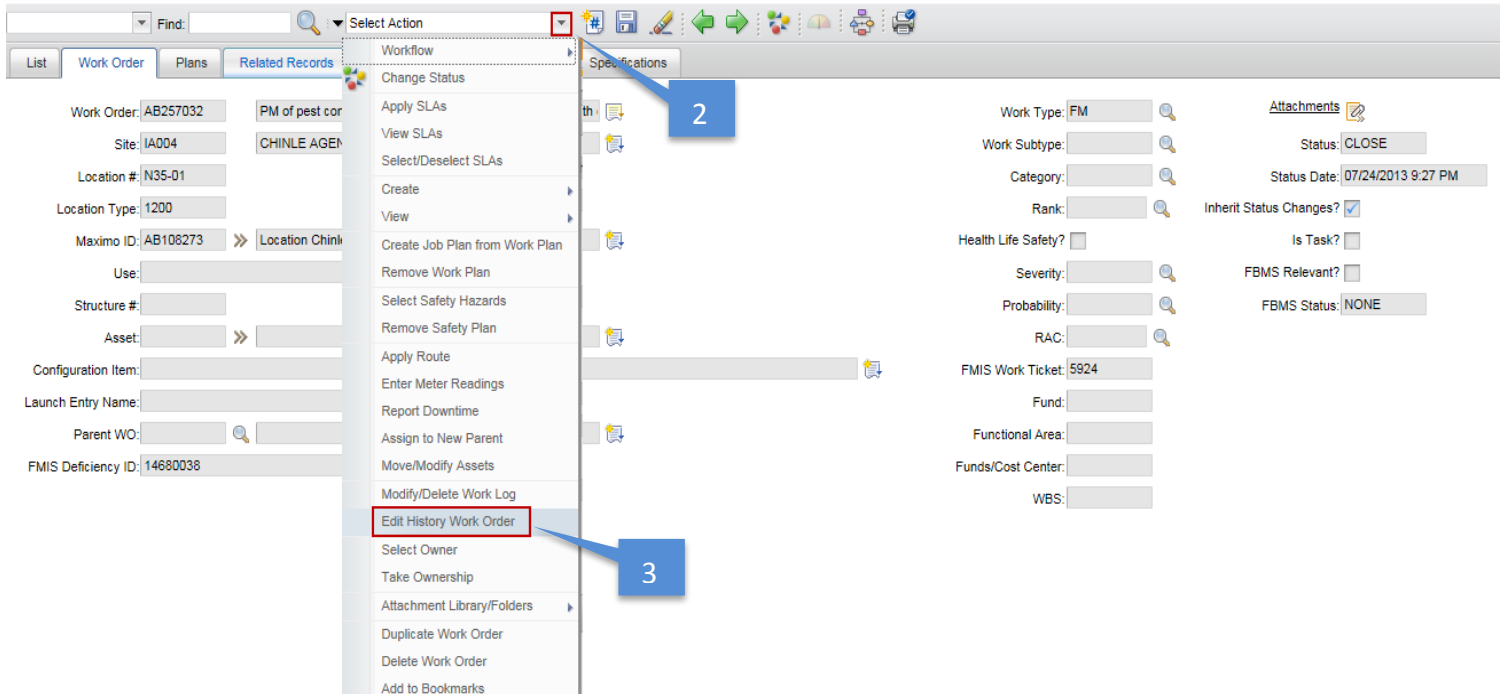
- 1) From the IA Work Order Tracking, go to the **Advanced Search** tool bar menu option.
- 2) Select the **Status** of 'CLOSE'.
- 3) Remove the 'N' value from the **History?** field.
- 4) Click **Find**.

This will produce a list of work orders that meet your criteria, including closed work orders.

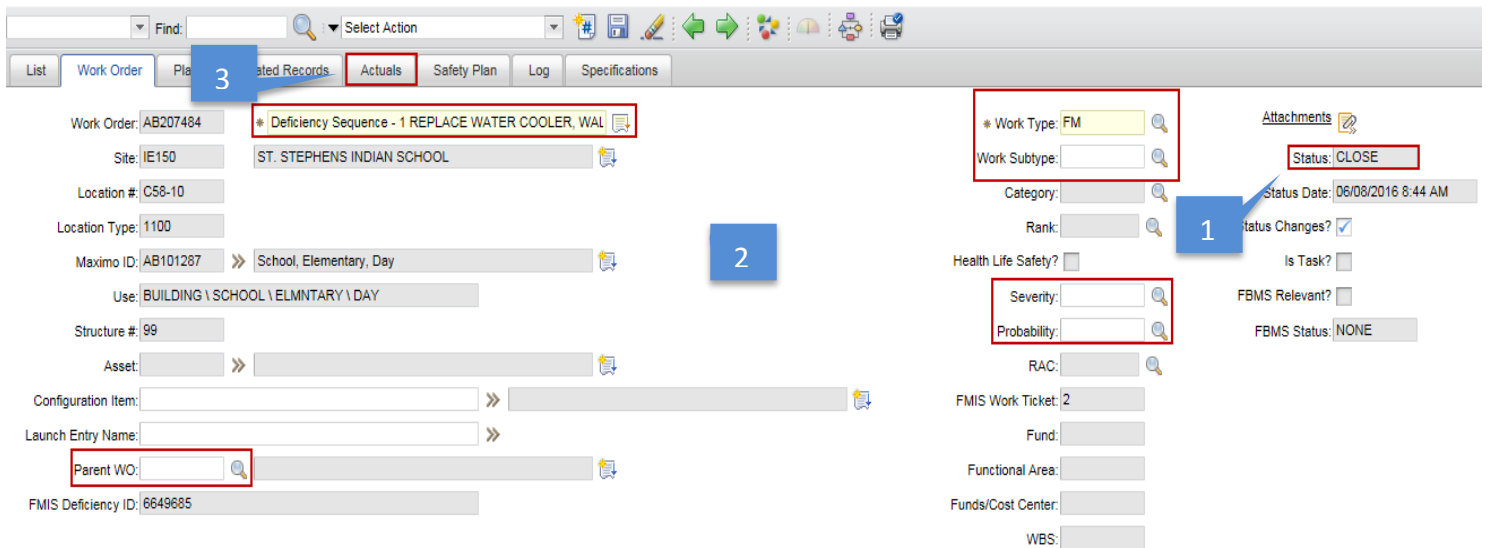


- 1) Select and open the closed work order you wish to edit.

- 2) Click on the **Select Action** menu on the tool bar
- 3) Select **Edit History Work Order**



You will be able to edit all fields that are not grayed out, as well as add hours, materials, and tools to the Actuals Tab.



- 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.

1.14 Creating Follow-up Work Orders

Work outside the scope of the original work order should be documented in a new work order. The new work order, known as a follow-up work order, allows a site to accurately track individual work performed on the component and asset associated with the original work performed.

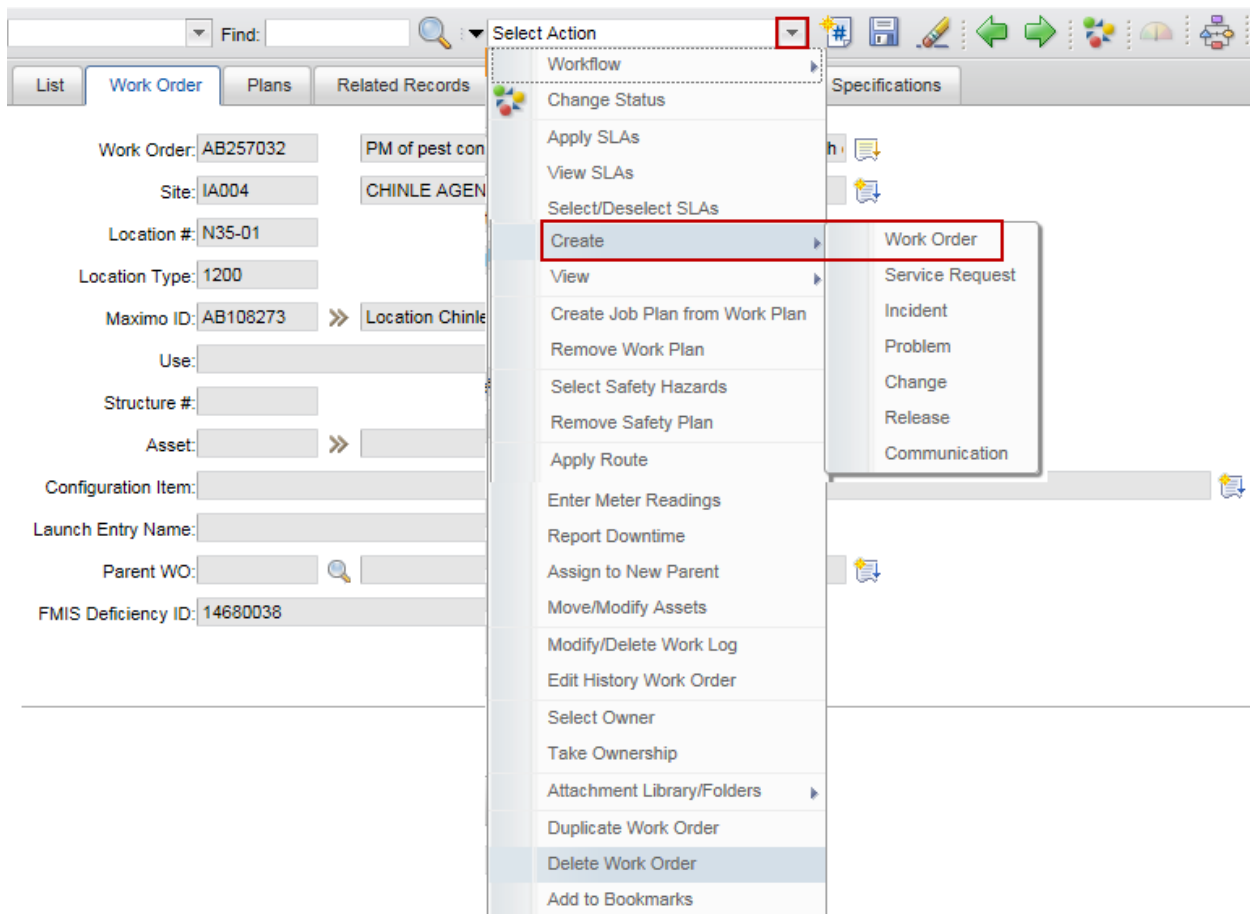
There are four main uses for follow-up work orders:

- Interim control measure and permanent fix for Health Life Safety.
- The work order was accidentally closed before it was completed.
- There is a different scope of work involved.
- Work needs to be completed for deficiencies that were identified during condition assessment.

To create a follow-up work order, open the existing work order that has follow-up work.

Note: A work order can be in any status when a follow-up work order is created.

- 1) Find and open the existing work order that has follow-up work.
- 2) Use the **Select Action** menu, select **Create**, and click on **Work Order**.



- A duplicate work order will be created. Edit data, such as the title, asset, work type, sub type, and target start date as needed to reflect the follow-up task.

The screenshot shows the 'Work Order' form with the following details:

- Work Order:** AB403168
- Site:** IA004
- Location #:** N35-01
- Location Type:** 1100
- Maximo ID:** AB104308
- Use:** BUILDING \ MULTPURP
- Structure #:** 137
- Asset:** [Empty]
- Work Type:** FM
- Status:** WAPPR
- Status Date:** 09/26/2016 12:51 PM
- Originating Record:** AB185630 (highlighted in red box)

- The original work order number will appear in the **Originating Record** field.
- Click on the **Related Records** tab to display the relationship between the originating work order and the follow-up work order.

The screenshot shows the 'Related Records' tab with the following data:

Work Order	Description	Class	Status	Relationship
AB257032	PM of pest control or IPM Inspection Services for the month	WORKORDEF	CLOSE	ORIGINATOR

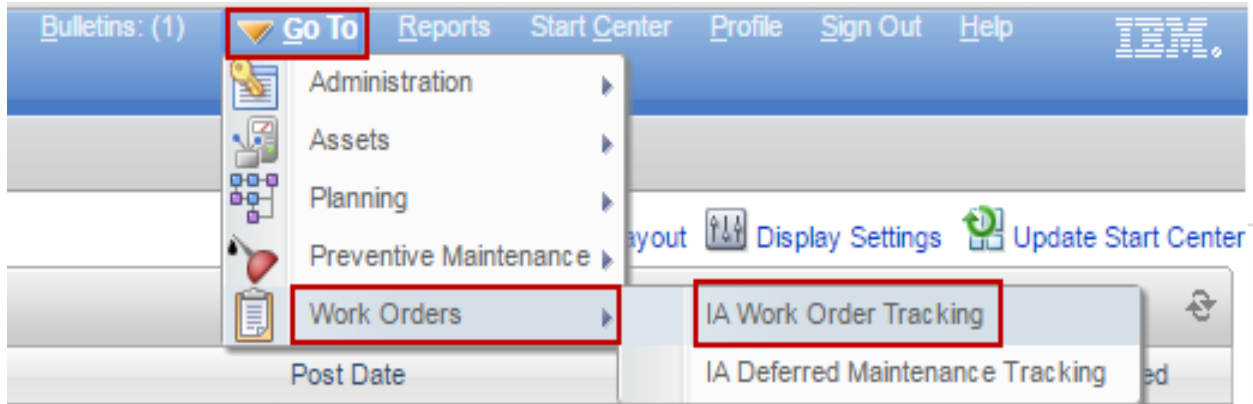
Below the table, it shows 'Related Tickets' with a message: 'There are no rows to display.'

Any work log and communication log entries will carry over to the newly created follow-up work order. The follow-up work order may need to be edited or updated before the work is completed.

1.15 Work Orders- Student Exercise #1

In this exercise you will create a basic **Work Order** to paint a wall. Use the following steps:


- 1) Navigate to the **IA Work Order Tracking** application.

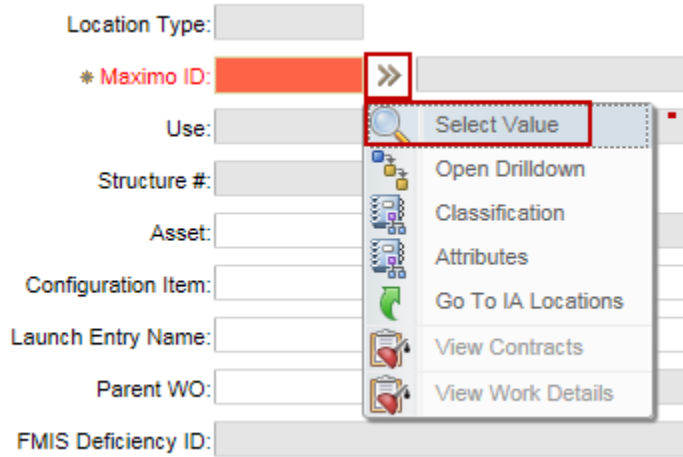


- 2) Click on the **New Work Order** icon located on the Toolbar 



- 3) Enter the **Description: Paint Wall** for the work order (add your initials at the end of the description. This will make it easier to find later on).

- 4) Make note of the auto-assigned unique Work Order Number: _____ (your number will differ from the one illustrated above).
- 5) Select the location where the work will be performed:
- 6) Click the **Detail Menu** icon  next to the **Maximo ID** field to display a list of locations to choose from. Choose **Select Value** to display the location list and make your selection.









- 7) Select a location by clicking on the **Maximo ID** for the location where the work will be performed (your location list may differ from the list depicted below. The list will display locations for the site to which you have access).

Select Value			
Location	Description	Type	Site
AB104250	Fire Station	OPERATING	IA004
AB104252	Office	OPERATING	IA004
AB104253	Quarters, Single-Family	OPERATING	IA004
AB104254	Quarters, Multi-Family Housing	OPERATING	IA004
AB104255	Quarters, Single-Family	OPERATING	IA004
AB104256	Quarters, Single-Family	OPERATING	IA004
AB104257	Quarters, Garage, Detached	OPERATING	IA004
AB104258	Quarters, Single-Family	OPERATING	IA004
AB104259	Quarters, Garage, Detached	OPERATING	IA004
AB104260	Quarters, Single-Family	OPERATING	IA004
AB104261	Quarters, Single-Family	OPERATING	IA004
AB104262	Quarters, Garage, Detached	OPERATING	IA004

- 8) Select the **Parent WO** to which this work will be associated.

Remember: This identifies the funding from the FBMS financial system for this specific work order. Selection of the correct standing work order is important to ensure all costs are properly reflected in Maximo.

- 9) Click the **Select Value** icon  next to the **Parent WO** field to display the list of **Standing Work Orders** to choose from.

List	Work Order	Plans	Related Records	Actuals	Safety Plan	Log	Specifications
Work Order:	AB403190	* Paint Wall (Your Initials)					
Site:	IA004	CHINLE AGENCY					
Location #:	N35-01						
Location Type:	1100						
* Maximo ID:	AB104256	>> Quarters, Single-Family					
Use:	BUILDING \ QUARTERS \ SINGFAM						
Structure #:	12						
Asset:		>>					
Configuration Item:		>>					
Launch Entry Name:		>>					
Parent WO:							
FMIS Deficiency ID:							

- a. Select the **Parent / Standing Work Order** from the list provided.

Workorder Parent

Filter > [Search Icon] [Refresh Icon] [Up Arrow] [Down Arrow] 1 - 6 of 6 [Download Icon] [Menu Icon]

Wonum	Description	Work Type	Maximo ID	Structure #	Status
AB108239	STRUCTURE 9 FO SO	RPFO	AB104253	9	APPR
AB108240	STRUCTURE 9 PS SO	RPFO	AB104253	9	APPR
AB108241	STRUCTURE 9 PM SO	RPFM	AB104253	9	APPR
AB108242	STRUCTURE 9 UM SO	RPFM	AB104253	9	APPR
AB108243	STRUCTURE 9 GM SO	RPFM	AB104253	9	APPR
AB317096	STRUCTURE 9 FM SO	RPFM	AB104253	9	APPR

Cancel

Note: If you attempt to select a Parent Work Order and no values are displayed (See Below) this means that there are no Standing Work Orders associated with you Maximo ID (or Location). If this happens select another Maximo ID for your work order.

Workorder Parent

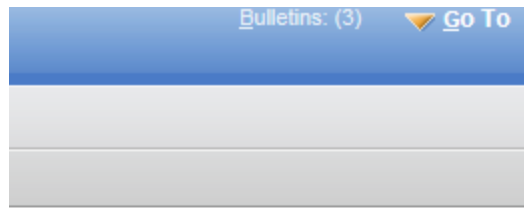
Filter > [Search Icon] [Refresh Icon] [Up Arrow] [Down Arrow] 0 - 0 of 0 [Download Icon] [Menu Icon]





Wonum	Description	Work Type	Maximo ID	Structure #	Status
No parent workorders found					

Cancel

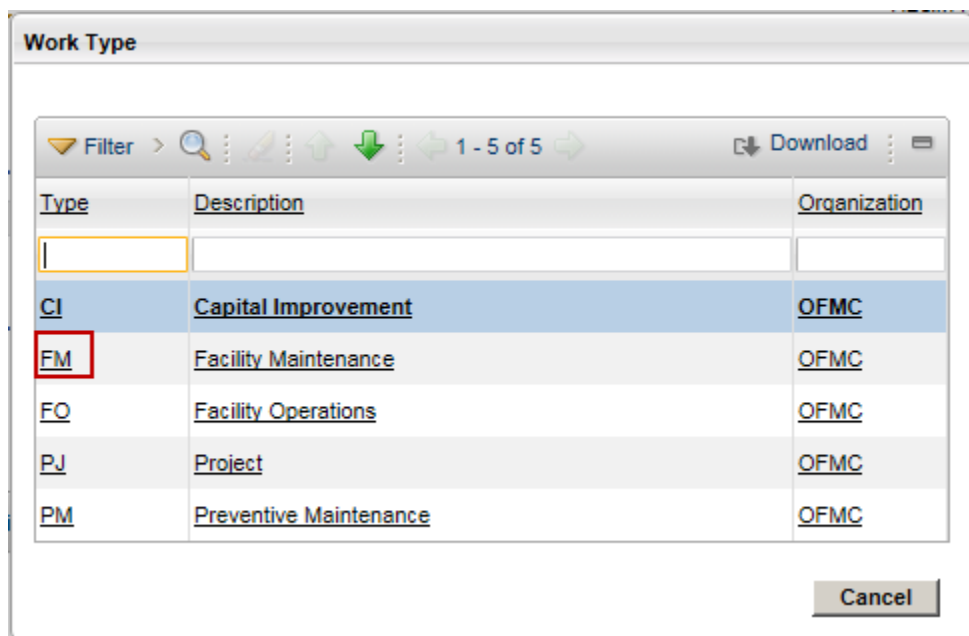
10) Select the correct **Work Type** for the work that is being performed.

- b) Click the **Select Value** icon  next to the **Work Type** field to display a list of valid work types to choose from.



* **Work Type:** 
Work Subtype: 
Category: 
Rank: 
Health Life Safety?

- c) Select a **Work Type** value from the list. For this exercise, select "FM".



- 11) In the **Job Details** section enter the **Quantity** and **Unit of Measure** for the work being performed. In this case, you will enter the total number of square feet that needs to be painted.








The screenshot displays the O&M Work Orders system interface. The top navigation bar includes a search field and a 'Select Action' dropdown. Below the navigation bar, the main content area is divided into several sections:

- Job Details Section:** This section is highlighted with a red circle and a red arrow pointing to it from the left sidebar. It contains the following fields:
 - Job Plan: [] >>
 - Job Plan Revision #: []
 - PM: [] >>
 - Safety Plan: [] >>
 - Unit of Measure: [] 🔍 (highlighted with a red box)
 - Quantity: [] (highlighted with a red box)
- Left Sidebar:** Contains a 'Job Details' label (circled in red) and a list of fields: Job Plan, Job Plan Revision #, PM, Safety Plan, Unit of Measure, and Quantity.
- Scheduling Information Section:** Contains fields for Target Start, Target Finish, Scheduled Start, Scheduled Finish, Predecessors, Actual Start, Actual Finish, Duration (0.00), and Time Remaining.
- Follow-up Work Section:** Contains fields for Originating Record and Has Follow-up Work?

- 12) Click the **Select Value** icon 🔍 next to the **Unit of Measure** field to display a list of valid units of measure to choose from. Select **SF** from the list.

- d) (You will need to use the right 'arrow'  at the top of the select value pop-up screen to display **SF** as this value is not on the first 'page' of options to select from.)

Select Value

Filter >      21 - 36 of 36  Download 

Value	Description
MBH	1,000 BTU Per Hour
MI	Miles
PH	Pounds Per Hour
PSI	Pounds Per Square Inch
PSIG	Pounds Per Square Inch Gauge
RPM	Revolutions Per Minute
SEAT	Seat
SF	Square Feet
SM	Shoulder Mile
SQ	Square
SY	Square Yards
THM	Therms
TN	Tons
V	Volts
W	Watts
YD	Yards

Cancel

- 12) Enter 100 for the **Quantity**.

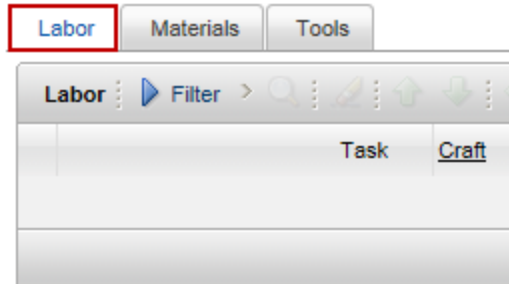
- 13) Save the Work Order by clicking the **Save** icon  located on the Toolbar.

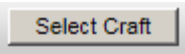


- 14) Select the **Plans** tab.




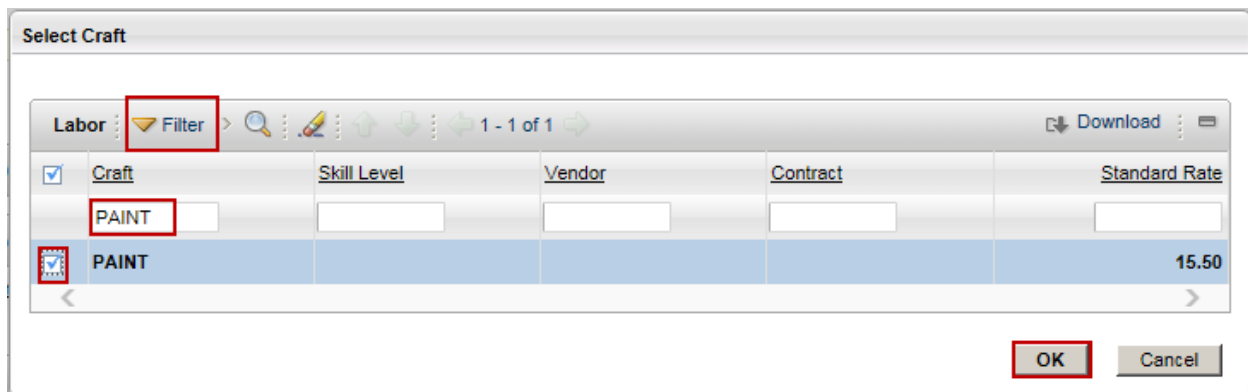
- 14) Select the **Labor** sub-tab located at the bottom of the screen.



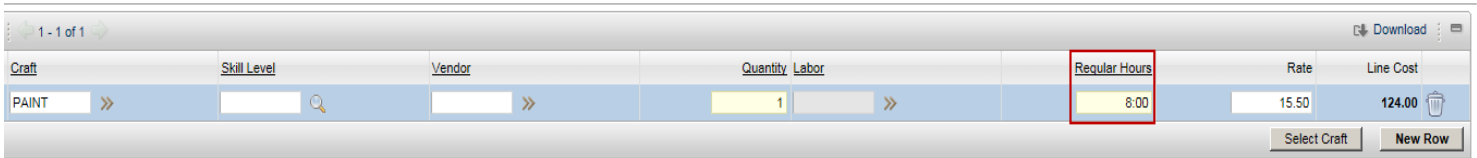
- 15) Click on the **Select Craft** button  located on the **lower-right side of the screen**. This will display the list of available crafts.

- 16) From the list of available crafts, select the craft to be **Paint**:


- a) Click the **Filter** icon , type "Paint" in the Craft field and hit Enter on the keyboard.
 b) Then check the checkbox located next to the craft name "Paint" (see below).



- 17) Click **OK**.
 18) Enter the anticipated number of hours (8.0) required to paint the room in the **Regular Hours** field. Hit the tab key on your keyboard.

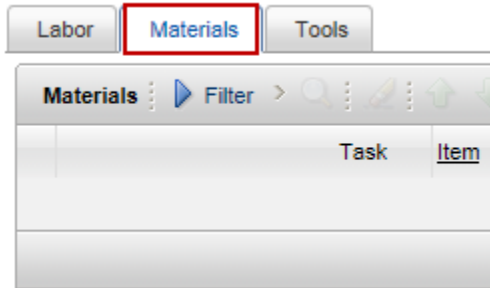


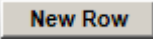
Craft	Skill Level	Vendor	Quantity	Labor	Regular Hours	Rate	Line Cost
PAINT			1		8.00	15.50	124.00

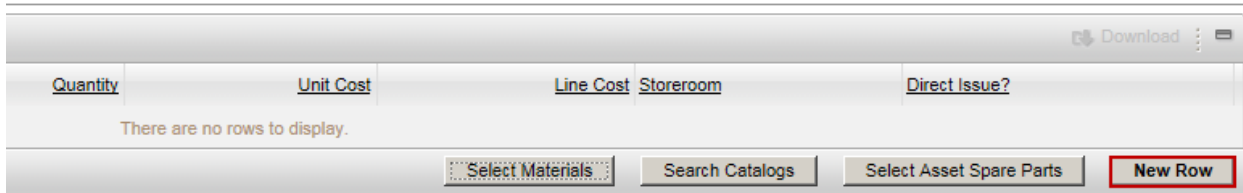
19) Save the Work Order by clicking the **Save** icon  located on the Toolbar.



20) Select the **Materials** sub-tab located at the bottom of the screen.



21) Click on the **Select Materials** button  located on the **lower-right side of the screen**. This will display the list of available materials.



Quantity	Unit Cost	Line Cost	Storeroom	Direct Issue?
There are no rows to display.				

22) Change **Line Type** from **Item** to **Material**.

Labor **Materials** Tools

Materials Filter > 1 - 1 of 1

Task	Item	Description

Details

Task:

* Item:

* Line Type: **Item** ▼

* Quantity:

Order Unit:

* Unit Cost:

Line Cost:

23) The Item **Description** field will become **RED**. This means that this field is now a 'Required' field and you must enter a description of the materials needed for the job. Also enter the **Unit Cost** (The 'Unit Cost' is the Total cost for the materials needed for the task).

Labor **Materials** Tools

Materials Filter > 1 - 1 of 1

Task	Item	Description

Details

Task:

* Item:

* Line Type: **Material** ▼

* Quantity:


Order Unit:


* Unit Cost:

Line Cost:

24) Enter: *Painting Materials* for the **Description** and a **Unit Cost** (i.e. Total Cost) of *150.00*.

The screenshot shows the 'Materials' entry interface. At the top, there are tabs for 'Labor', 'Materials', and 'Tools'. Below the tabs is a search and filter area. A table with columns 'Task', 'Item', and 'Description' is visible. The 'Description' column contains the text 'Painting Materials'. Below the table, the 'Details' section contains several input fields: 'Task', 'Item', '* Line Type' (set to 'Material'), '* Quantity' (set to '1.00'), 'Order Unit', '* Unit Cost' (set to '150.00'), and 'Line Cost' (set to '0.00'). The '* Unit Cost' field is highlighted with a red rectangular box.

25) Save the Work Order by clicking the **Save** icon  located on the Toolbar.

26) Change the status to **APPROVED** the work order. Click the **Change Status** icon  on the Toolbar to display the Change Status pop-up screen.

a) Select **APPROVED** from the **New Status** selection list.

The 'Change Status' dialog box displays the following information:


- Work Order: AB401811
- Replace Entry Door
- Status: WAPPR
- WAITING ON APPROVAL (WAPPR)
- * New Status: APPROVED (highlighted with a red box)
- * Status Date: 07/13/2016 8:59 AM
- Print or Email Work Order Report when change status in background selected?
- Change work order status in back ground?
- Notification E-mail for Work Order Change Status: biaadmin@dtec.com
- Buttons: OK (highlighted with a red box), Cancel

27) Click **OK** to change the status to **Approved (APPR)** status. The work order is now approved and ready for work.

1.16 Work Orders- Student Exercise #2

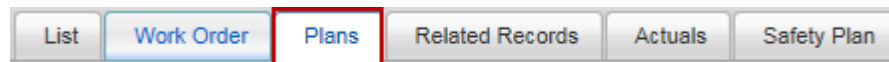
In this exercise you will create three Work Orders. Use the following information:

First Work Order

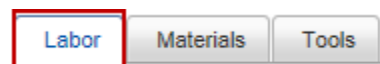
1. Navigate to the **IA Work Order Tracking** application.
2. Click on the **New Work Order**  icon located on the Toolbar
3. Note the auto-assigned unique work order number _____
4. Select a location (**Maximo ID**) where the work will be performed.
5. Enter the following data:
 - Description: *Replace Air Filter for H&V system (plus your initials)*
 - Parent WO: *Select an appropriate RPFM Work Order (FBMS Standing Work Order) that corresponds with the location you selected.*
 - Work Type: FM
 - Quantity: 1
 - Unit of Measure: EA
 - Priority: 5
 - Priority Justification: *Routine Maintenance*
 - Scheduled Start: Select a date in the future.
 - Scheduled Finish: Select a future date greater than Scheduled Start.

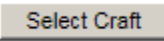


6. **Save** the Work Order.
7. Click on the work order **Plans** tab.



8. Select the **Labor** sub-tab.



9. To select the planned Craft click on the push button . Don't forget to use the Filter

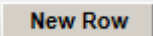


icon to search for the **Craft** description.

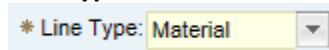
- Craft: ACMECH, 8 hours

10. Select the **Materials** Sub-tab





11. To select Materials click on the push button 


- Change **Line Type** from **Item** to **Material**





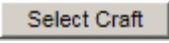




- For the Material **Description** enter: *Air Filter 14X25X2*
- Enter **Unit Cost**: 4.92

Item:	>> *	Airfilter 14x25x2	
* Line Type:	Material		
* Quantity:	1.00		
Order Unit:			
* Unit Cost:	4.92		
Line Cost:	4.92		


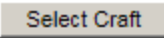
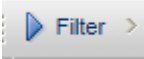



12. **Save**  the Work Order.

13. **Approve**  the Work Order.

Second Work Order

1. Click on the **New Work Order**  icon located on the Toolbar
2. Note the auto-assigned unique work order number: _____
3. Enter the following data:
 - Description: *Oil Change (plus your initials)*
 - Location: **(Maximo ID)** *Select any location from your Site*
 - Parent WO: *Select an appropriate RPFM Work Order (FBMS Standing Work Order) that corresponds with the location you selected.*
 - Work Type: FM
 - Quantity: 1
 - Unit of Measure: EA
 - Priority: 5
 - Priority Justification: *Routine Maintenance*
 - Scheduled Start: *Select a future date.*
 - Scheduled Finish: *Select a future date greater than Scheduled Start.*
4. **Save**  the Work Order.
5. Click on the work order **Plans** tab.
6. Select the **Labor** sub-tab.
7. To select the planned Craft click on the push button . Don't forget to use the Filter icon  to search for the **Craft** description.
 - Craft: MECH, 8 hours
8. Select the **Materials** Sub-tab
9. To select the planned materials click on the push button .
 - Change **Line Type** from **Item** to **Material**
 - Material Description: *Oil Filter*
 - Unit Cost: *4.99*
10. **Save**  the work order.
11. **Approve**  the work order.

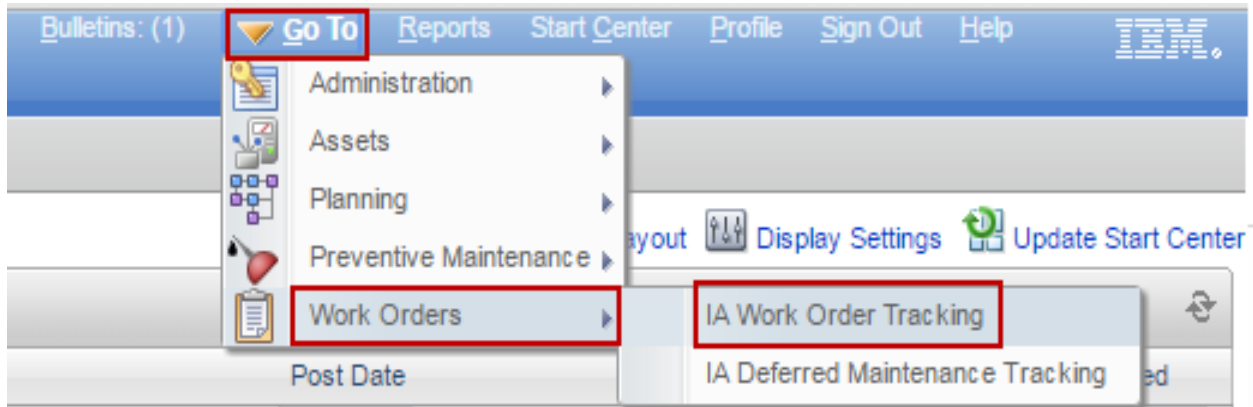
Third Work Order

1. Create a Work Order to replace the outdoor parking lot light
2. Note the auto-assigned unique work order number: _____
3. Enter the following data:
 - Description: *Replace Parking Lot Light #1 (plus your initials)*
 - Location: **(Maximo ID)** *Select any location from your Site*
 - Parent WO: *Select an appropriate RPFM Work Order (FBMS Standing Work Order) that corresponds with the location you selected.*
 - Work Type: FM
 - Quantity: 1
 - Unit of Measure: EA
 - Priority: 9
 - Priority Justification: *Public Safety Issue*
 - Scheduled Start: *Select a future date.*
 - Scheduled Finish: *Select a future date greater than Scheduled Start.*
4. Save  the Work Order.
5. Click on the work order **Plans** tab.
6. Select the **Labor** sub-tab.
7. To select the planned Craft click on the push button . Don't forget to use the Filter icon  to search for the **Craft** description.
 - Craft: Elec, 4 hours
 - Craft: Mech, 4 hours
8. Select the **Materials** Sub-tab
9. To select the materials click on the push button  .
 - Change **Line Type** from **Item** to **Material**
 - Material Description: *400 Watt Light*
 - Unit Cost: *249.50*
10. Save  the work order.
11. Approve  the work order.

1.17 Work Orders- Student Exercise #3

In this exercise you will create a more detailed **Work Order** to perform maintenance on an asset. This exercise introduces the use of Job Plans (*FMIS Technologies*) and the use of Asset Records for a work order. Use the following steps:

1. Navigate to the **IA Work Order Tracking** application.



2. Click on the **New Work Order** icon located on the Toolbar 




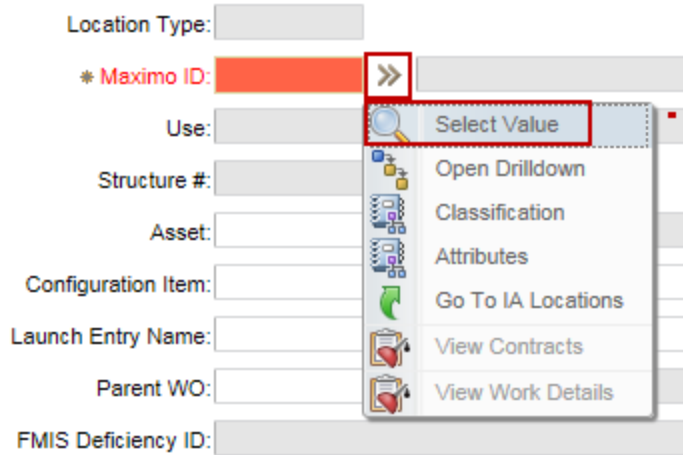
3. Enter the **Description: Fan Coil Unit (Your Initials)** for the work order.

List	Work Order	Plans	Related Records	Actuals	Safety Plan	Log	Specifications
Work Order:	AB403190	* Fan Coil Unit (Your Initials)					
Site:	IA004	CHINLE AGENCY					
Location #:	N35-01						

4. Make note of the auto-assigned unique Work Order Number: _____ (your number will differ from the one illustrated above).

5. Select the location where the work will be performed:


- Click the **Detail Menu** icon  next to the **Maximo ID** field to display a list of locations to choose from. Choose **Select Value** to display the location list and make your selection.

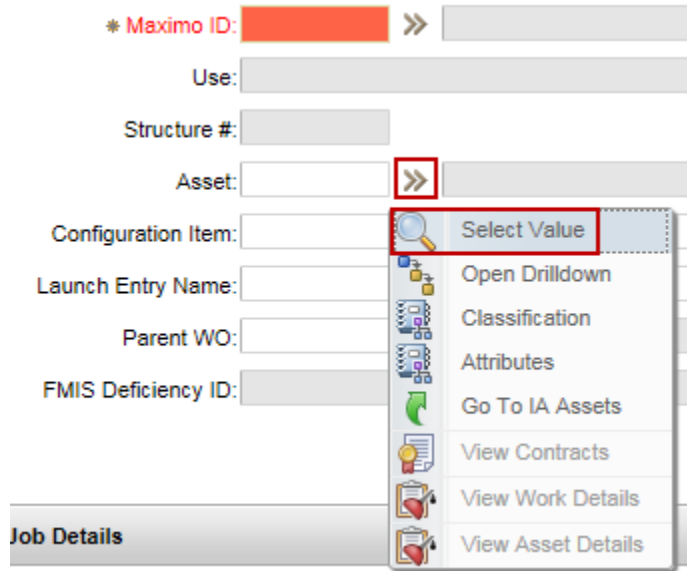


- Select a **Maximo ID** number **AB199514** for the location where the work will be performed.

Select Value				
Maximo ID	Description	Location Type	Site	Structure #
AB199514				
AB104250	Fire Station	1100	IA004	4
AB104252	Office	1100	IA004	8
AB104253	Quarters, Single-Family	1100	IA004	9
AB104254	Quarters, Multi-Family Housing	1100	IA004	10
AB104255	Quarters, Single-Family	1100	IA004	11
AB104256	Quarters, Single-Family	1100	IA004	12
AB104257	Quarters, Garage, Detached	1100	IA004	13
AB104258	Quarters, Single-Family	1100	IA004	14
AB104259	Quarters, Garage, Detached	1100	IA004	15
AB104260	Quarters, Single-Family	1100	IA004	16

Select the **Asset** for which the work order will be assigned.

- Click the **Detail Menu** icon  next to the **Asset** field to display a list of assets to choose from. Choose **Select Value** to display the asset list and make your selection (same as you did to select the location in the prior step)



- **Select only *one*** of the highlighted Assets by clicking on the 'Assetnum'.

Asset

Filter > [Search Icon] [Refresh Icon] [Up Arrow] [Down Arrow] 1 - 10 of 39 [Download Icon] [Menu Icon]

Assetnum	Description	Maximo ID	Structure #	Siteid
AB188059	Fan, Exhaust Hood	AB199514	28	IA004
AB188060	Fan, Exhaust Hood	AB199514	28	IA004
AB188061	Fan, Exhaust Hood	AB199514	28	IA004
AB188062	Fan, Exhaust Hood	AB199514	28	IA004
AB188063	Fan, Exhaust Hood	AB199514	28	IA004
AB188064	Fan, Exhaust Hood	AB199514	28	IA004
AB188065	Fan, Exhaust Hood	AB199514	28	IA004
AB188066	Fan, Exhaust Hood	AB199514	28	IA004
AB188067	Fan, Exhaust Hood	AB199514	28	IA004
AB188068	Fan, Exhaust Hood	AB199514	28	IA004

Cancel

Note: If you attempt to select an asset and no values are displayed (See Below) this means that the Maximo ID (or Location) displayed on your work order has no Assets associated with it. If this happens select another Maximo ID for your work order.

Asset


Filter > [Search Icon] [Refresh Icon] [Up Arrow] [Down Arrow] 0 - 0 of 0 [Download Icon] [Menu Icon]

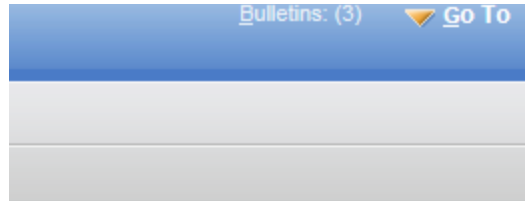
Assetnum	Description	Maximo ID	Structure #	Siteid


No Asset found


Cancel


6. Select the correct **Work Type** for the work that is being performed.


- Click the **Select Value** icon  next to the **Work Type** field to display a list of valid work types to choose from.



* **Work Type:** 

Work Subtype: 







Category: 

Rank: 

Health Life Safety?


- Select a **Work Type** value from the list. For this exercise, select "**FM**".







Work Type

Filter >     1 - 5 of 5  Download 

Type	Description	Organization
<input type="text" value=""/>		
CI	Capital Improvement	OFMC
FM	Facility Maintenance	OFMC
FO	Facility Operations	OFMC
PJ	Project	OFMC
PM	Preventive Maintenance	OFMC








- Select the **Parent WO** to which this work will be associated.
Remember: This identifies the funding from the FBMS financial system for this specific work order. Selection of the correct standing work order is important to ensure all costs are properly reflected in Maximo.

- Click the **Select Value** icon  next to the **Parent WO** field to display the list of **Standing Work Orders** to choose from. Choose **Select Value** to display the Standing Work Order list and make your selection.

Work Order: * 
 Site: 
 Location #:
 Location Type:
 * Maximo ID: >> 
 Use:
 Structure #:
 Asset: >> 
 Configuration Item: >>
 Launch Entry Name: >>
Parent WO:  
 FMIS Deficiency ID:

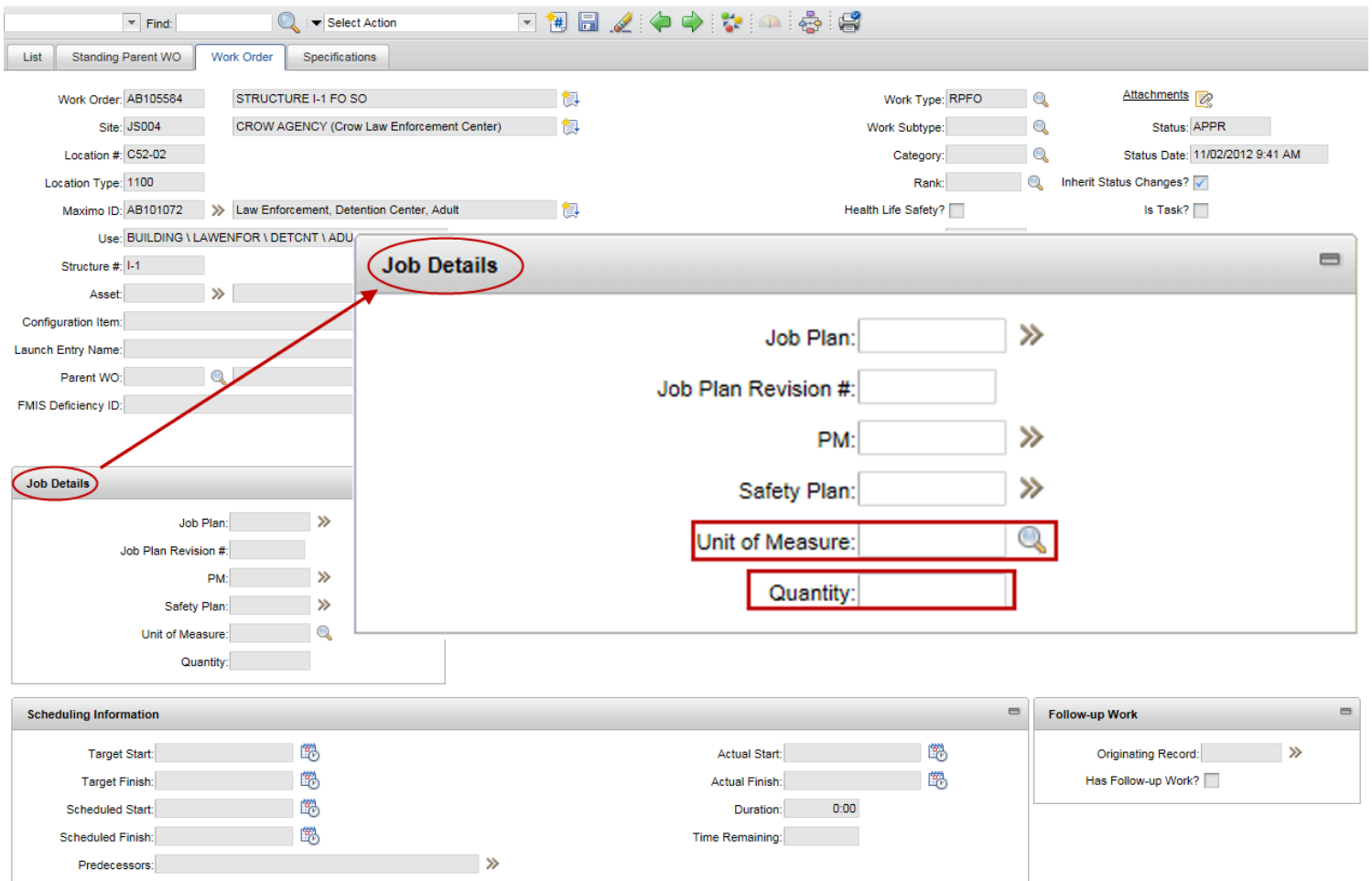
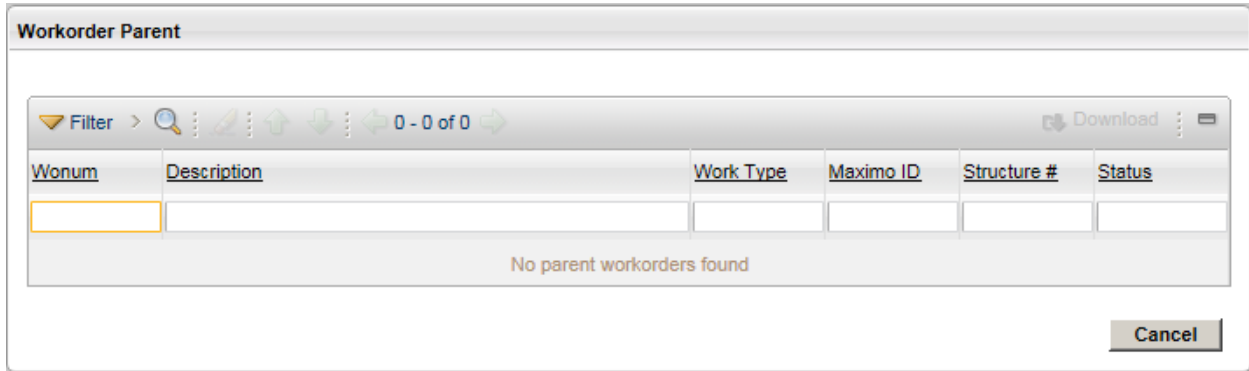
- Select the **Standing Work Order** by clicking on the **Wonum** number.


Workorder Parent



Filter >      1 - 6 of 6  Download 

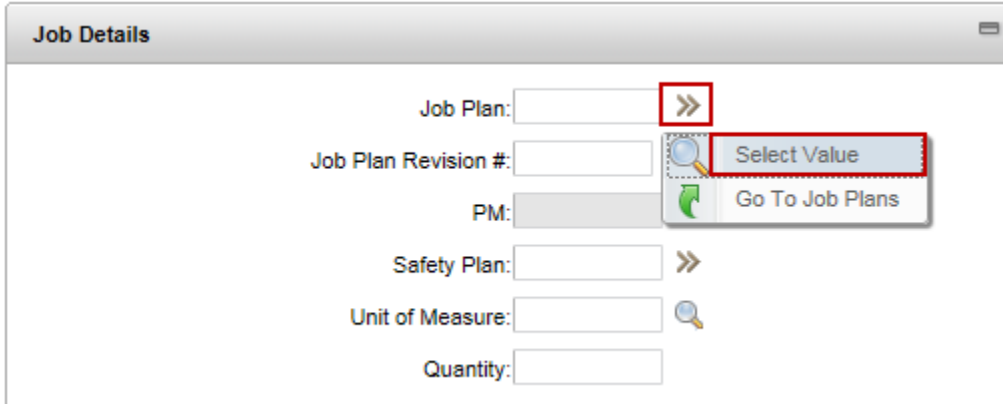
Wonum	Description	Work Type	Maximo ID	Structure #	Status
<input type="text"/>					
AB108239	STRUCTURE 9 FO SO	RPFO	AB104253	9	APPR
AB108240	STRUCTURE 9 PS SO	RPFO	AB104253	9	APPR
AB108241	STRUCTURE 9 PM SO	RPFM	AB104253	9	APPR
AB108242	STRUCTURE 9 UM SO	RPFM	AB104253	9	APPR
AB108243	STRUCTURE 9 GM SO	RPFM	AB104253	9	APPR
AB317096	STRUCTURE 9 FM SO	RPFM	AB104253	9	APPR

Note: If you attempt to select a Parent Work Order and no values are displayed (See Below) this means that there are no Standing Work Orders associated with you Maximo ID (or Location). If this happens select another Maximo ID for your work order.





- In the **Job Details** section click the **Select Value** icon  next to the **Unit of Measure** field. This will display a list of valid units of measure to choose from. Select **EA** from the list.
- Enter the **Quantity** (1) for the **Unit of Measure** for the work being performed.


8. Save the Work Order by clicking the **Save** icon  located on the Toolbar.
9. Apply a **Job Plan** to the work order.
 - Click the **Detail Menu**  next to the **Job Plan** field to display a list of available job plans to choose from. Choose **Select Value**.





Job Details

Job Plan: 

Job Plan Revision #:  **Select Value**

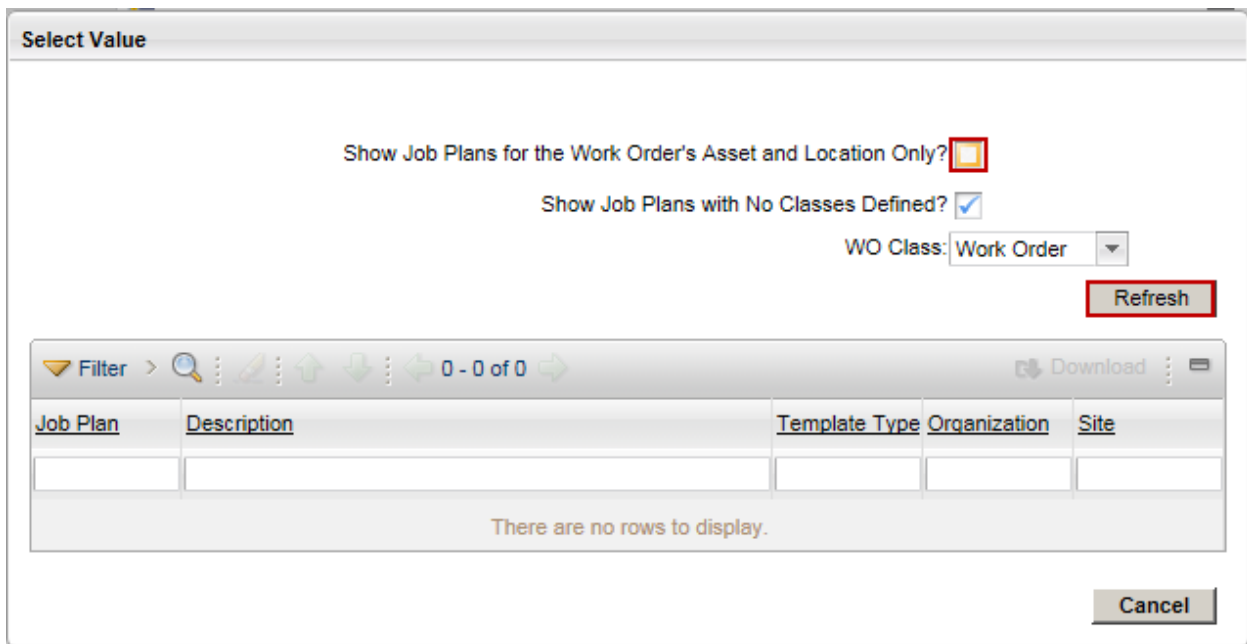
PM:  Go To Job Plans

Safety Plan: 

Unit of Measure: 

Quantity:

- **Uncheck** the **'Show Job Plans for the Work Order's Asset and Location Only?'** check box and click the **Refresh** button.



Select Value

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


Show Job Plans with No Classes Defined?

WO Class:

Refresh

Job Plan	Description	Template Type	Organization	Site
There are no rows to display.				

Cancel

- From the list of **Job Plans**, search using the filter icon  and search for the Job Plan using the Job Plan number **or** the Job Plan description.
- Find Job Plan: **IA_5093610, Fan coil unit.**

Select Value

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

Show Job Plans with No Classes Defined?


WO Class: Work Order ▼

Refresh




Filter > 🔍 🖋️ ⬆️ ⬇️ ⬆️ 1 - 2 of 2 ⬆️ ⬇️ ⬆️ Download ⋮

Job Plan	Description	Template Type	Organization	Site
	Fan Coil Unit			
IA_5093610	Fan coil unit	MAINTENANCE	OFMC	-
IA_5094021	Fan coil unit - Annually	MAINTENANCE	OFMC	-

Cancel

10. Save the Work Order by clicking the **Save** icon  located on the Toolbar.

11. Select the **Plans** tab.

Find: 🔍 Select Action ▼   

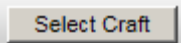
List Work Order **Plans** Related Records Actuals Safety Plan Log Specifications

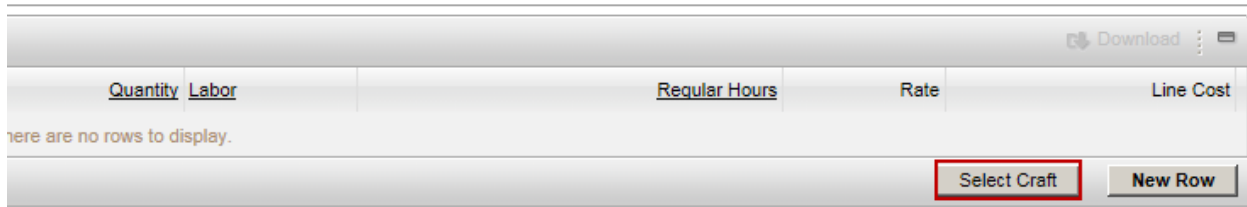
12. Select the **Labor** sub-tab located at the bottom of the screen.



Labor Materials Tools

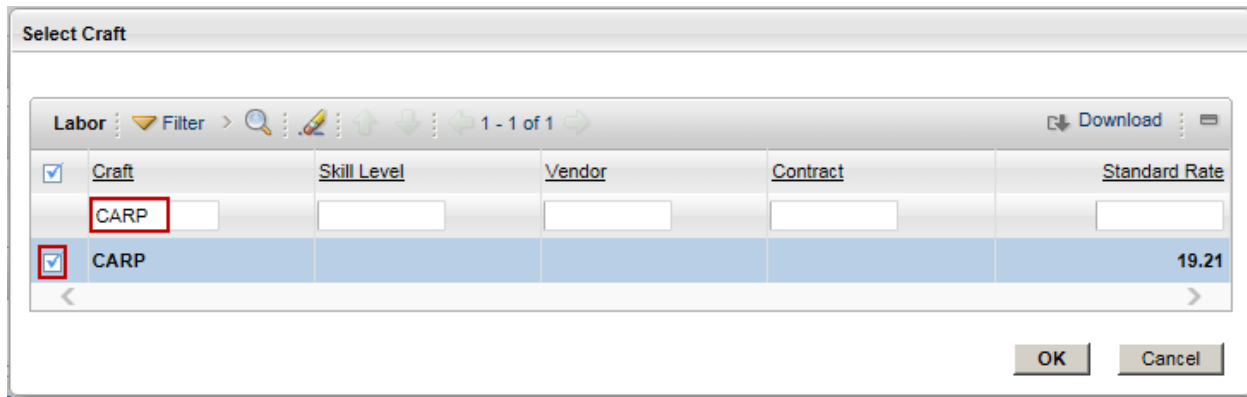
Labor Filter > 🔍 🖋️ ⬆️ ⬇️ ⬆️

Task	Craft

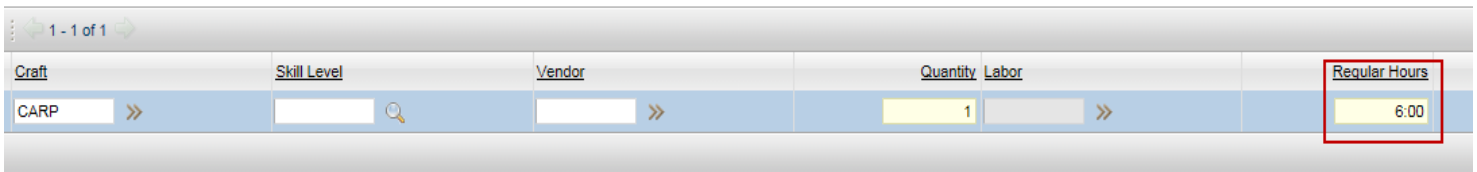
- Click on the **Select Craft** button  located on the lower-right side of the screen. This will display the list of available crafts.




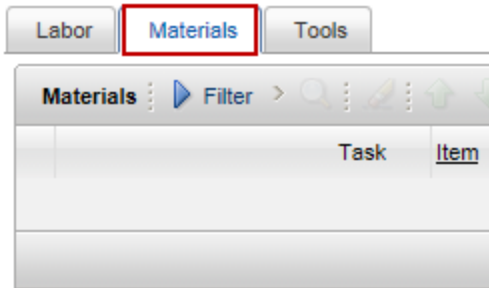
- From the list of available crafts, use the filter icon  to search for the Craft description of **CARP** then click in the checkbox  located next to the craft name (see below) to add it to the work order.

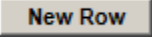


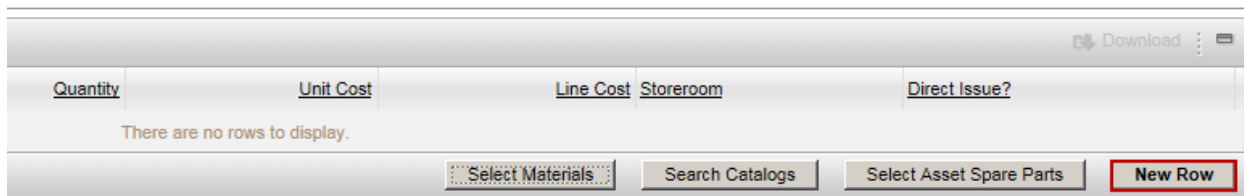
- Click **OK**.
- Enter the anticipated number of hours required to do the carpenter’s work in the **Regular Hours** field.



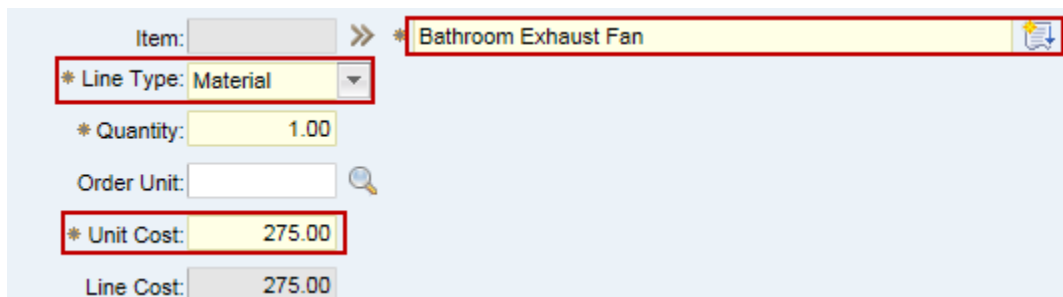
- Save the Work Order by clicking the **Save** icon  located on the Toolbar.
- Select the **Materials** sub-tab located at the bottom of the screen.




19. Click on the **New Row** icon  located on the lower-right side of the screen. This will display the list of available materials.



- Change **Line Type** from **Item** to **Material**
- Material Description: *Bathroom Exhaust Fan*
- Unit Cost: *275.00*



20. Save the Work Order by clicking the **Save** icon  located on the Toolbar.

21. Change the work orders status to **APPROVED**. Click the **Change Status** icon  on the Toolbar to display the **Change Status** pop-up screen.

- Select **APPROVED** from the **New Status** selection list.

Change Status

Work Order: AB293522 PM PEST CONTROL SERVICES/IPM INSPECTION OF ALL

Status: WAPPR WAITING ON APPROVAL (WAPPR)

* New Status: APPROVED (v)

* Status Date: 07/13/2016 9:42 AM

Print or Email Work Order Report when change status in background selected?

Change work order status in back ground?

Notification E-mail for Work Order Change Status: biaadmin@dtcc.com

OK Cancel

22. Click **OK**.

The work order is now approved and ready for work.

1.18 Work Orders- Student Exercise #4

In this exercise you will create two Work Orders each with a Job Plan and Asset identified on the work order. Use the following information:

First Work Order

1. Navigate to the **IA Work Order Tracking** application.
2. Click on the **New Work Order** icon located on the Toolbar
3. Note the auto-assigned unique work order number _____
4. Enter a description for the work order
 - Description: *Fire Door Inspection (plus your initials)*
5. Select a location (Maximo ID) where the work will be performed - choose the "Fire Station."
6. Select the asset (fire doors) for the work order.
7. Select the Parent Work Order to which the work will be assigned
8. Enter the following data:
 - Work Type: FM
 - Quantity: 1
 - Unit of Measure: EA
 - Job Plan: IA_5093557
 - Priority: 1
 - Priority Justification: *Safety Related*
 - Scheduled Start: *Select a future date*
 - Scheduled Finish: *Select a future date greater than Scheduled Start*
9. Save the Work Order.
10. Select the Plans Tab
11. Select the Labor Sub-tab
12. Select a craft for the work
13. Enter the anticipated number of Regular Hours for the job
14. Select the Materials Sub-tab
15. Add a Material called: Grease
 - a. Unit Cost: 6.89
16. Save the Work Order
17. Approve the Work Order

Second Work Order

18. Create a Work Order to perform routine maintenance on an Evaporative Cooler

19. Note the auto-assigned unique work order number: _____

20. Enter the following data:

- Description: *Routine Maintenance Evap. Cooler (Your initials)*
- Location: *Select one of the locations (Maximo ID) from your Site. Use anyone of the following Maximo ID's:*
 - AB199627
 - AB199628
 - AB199629
 - AB199630
 - AB199631
 - AB199632
 - AB199633
- Asset: *Select an asset (Evaporative Cooler).*
- Parent WO: *Select a Parent Work Order.*
- Work Type: FM
- Quantity: 1
- Unit of Measure: EA
- Job Plan: IA_5093656
- Priority: 5
- Priority Justification: *Routine Maintenance*
- Scheduled Start: *Select a future date*
- Scheduled Finish: *Select a future date greater than Scheduled Start*

21. On the work order plans tab, enter planned labor for the following:

- Craft: HVAC, 3 hours

22. Enter the following Material for the work order:

- a. Material: *Evap. Cooler pads*
- b. Unit Cost: 2.99

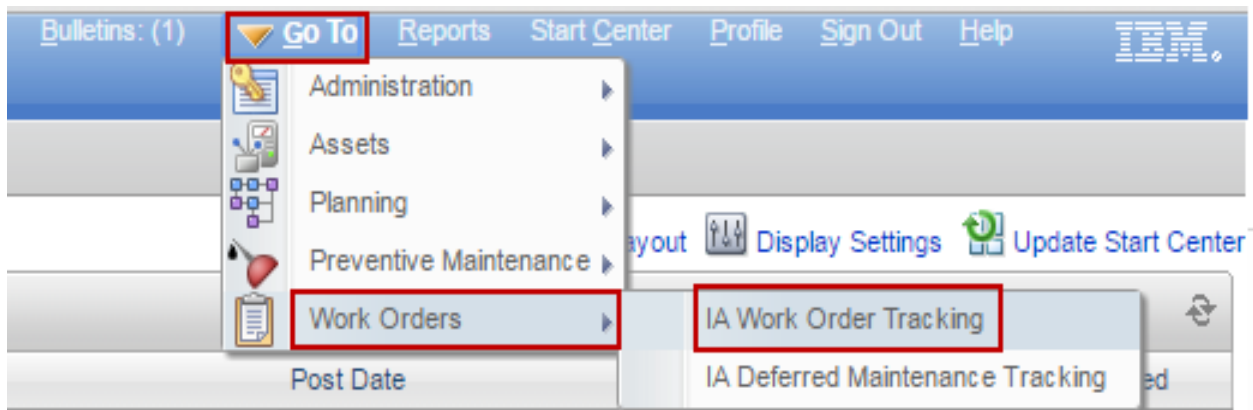
23. Save the work order

24. Approve the work order

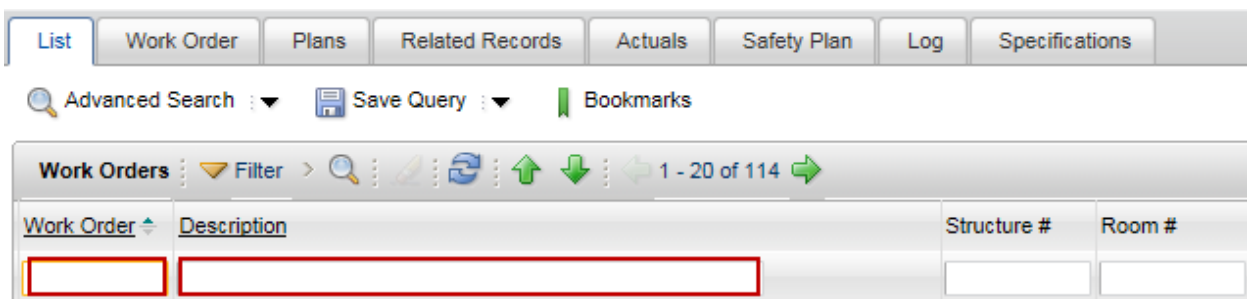
1.19 Work Orders- Student Exercise #5

In this exercise you will record actual labor and material usage for a work order you previously created in work order exercise #1. This exercise introduces users to the operations necessary to record work accomplishments against work orders. Use the following steps:

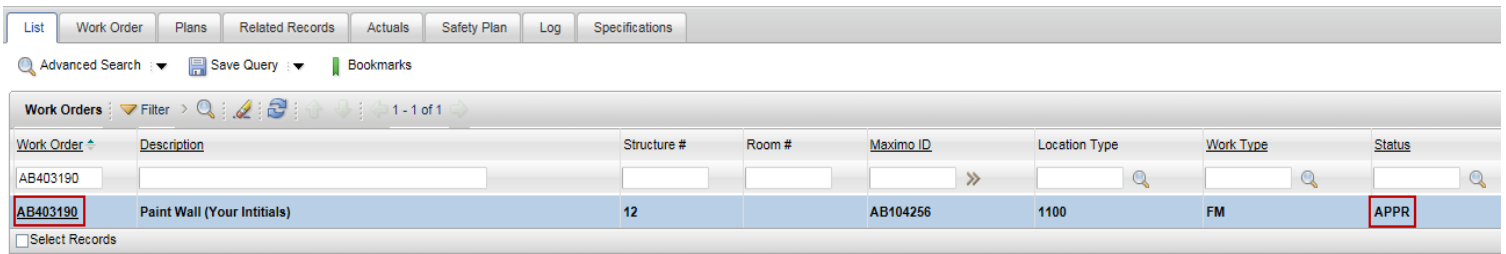
1. Navigate to the IA Work Order Tracking application.



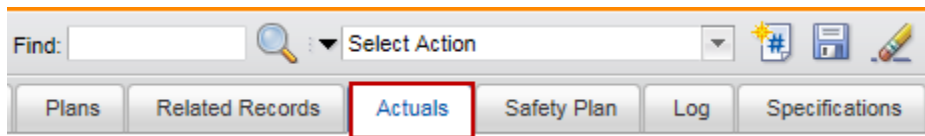
2. From the work order list screen, *enter the work order number you recorded as part of Exercise #1 (See pg. 34)* in the **Work Order** field and press the enter key. Or enter your initials if you added them the end of work order description. This will allow you to easily find the work order we will use for this exercise.



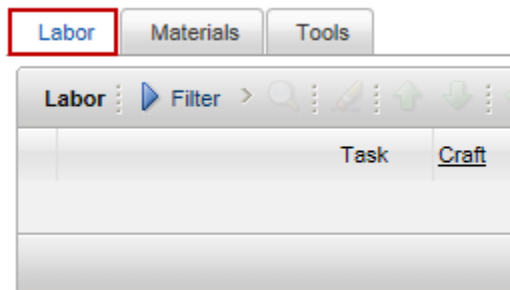
3. Click on the **Work Order** number to select the work order and display the record on the work order tab. Double-check to ensure the work order **Status** is **APPR**. If the status is not APPR, change the status to APPR before proceeding to the next step.



4. Select the **Actuals** tab.

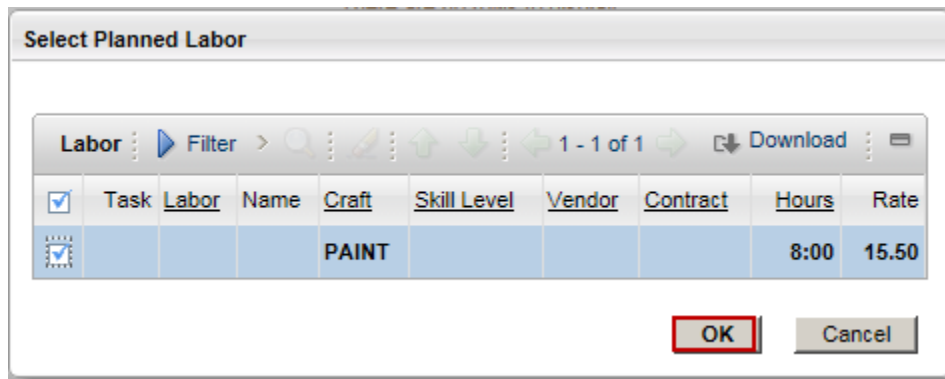


5. Select the **Labor** sub-tab located at the bottom of the screen.




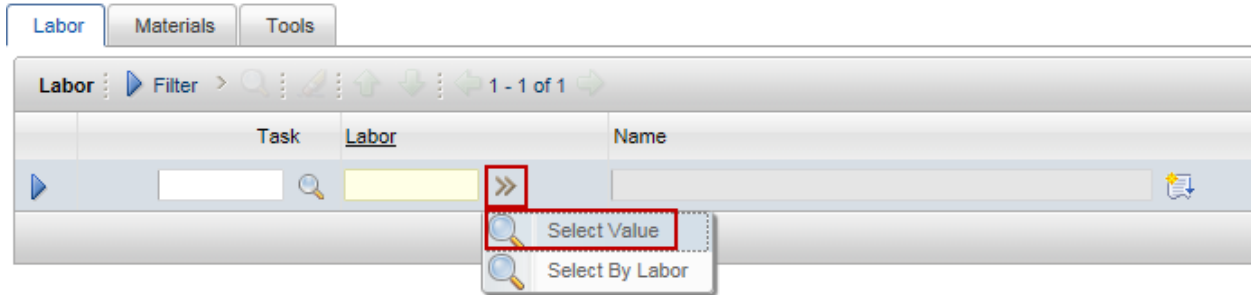
6. Click on the **Select Planned Labor** button located on the lower-right side of the screen. This will display the list of crafts that were originally planned for this work (you entered these during exercise #1).

7. From the list of available crafts, select **PAINT** by clicking in the checkbox located next to the craft name (see below).

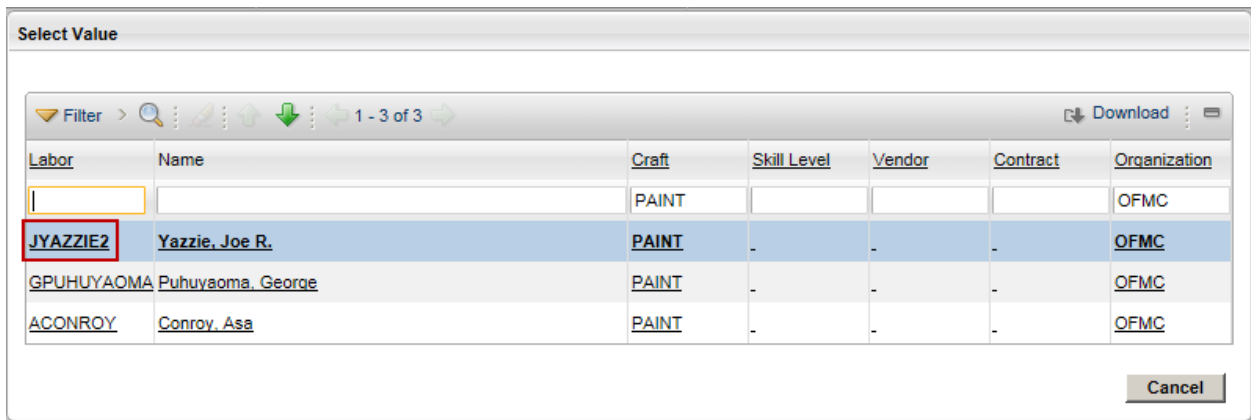


8. Click **OK**.

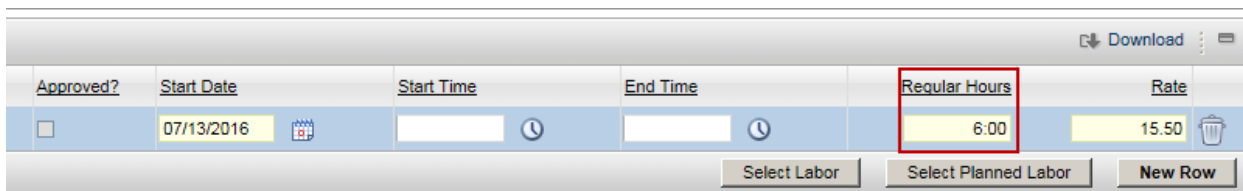
9. With the cursor in the **Labor** field, click the **Detail Menu** icon  next to the **Labor** field to display the laborers associated with the PAINT craft. Choose the **'Select Value'** option to display the list of laborers (in this case, Painters) and make your selection.



a. Select one of the labor records. This will assign the work to an individual person.



10. Enter the **Regular Hours** reported to complete the work. In the event that the actual hours were different from the planned hours, enter the value. For this exercise, enter: 6 hours (a variance of 2 hours from the planned 8 hours).



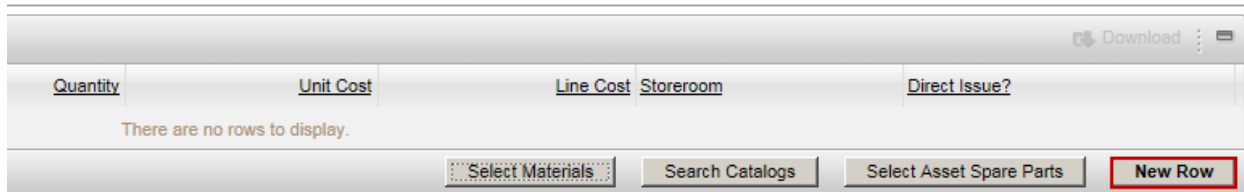
11. Save the Work Order by clicking the **Save** icon  located on the Toolbar.

12. Select the **Materials** sub-tab located at the bottom of the screen. In the earlier exercise we estimated the cost of Materials. In this exercise we will enter that real cost of the materials

needed to perform the work. This amount is usually not the same as what was estimated. In these examples you can enter any amount you would like.





13. Click on the **New Row**  located on the lower-right side of the screen



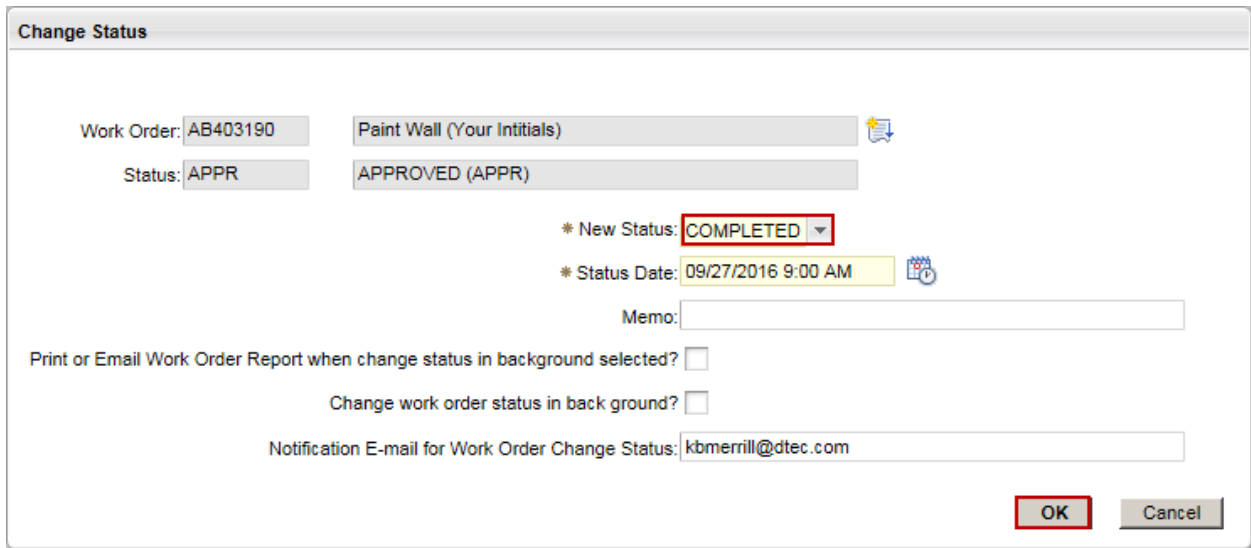
15. Change **Line Type** to **Materials** and enter the material

- Description: *Painting Materials*.
- Unit Cost: *248.00*

16. Save the Work Order by clicking the **Save** icon  located on the Toolbar.

17. Change the status of the work order to **COMPLETED**. Click the  icon on the Toolbar to display the **Change Status** pop-up screen.

- Select **COMPLETED** from the **New Status** selection list.

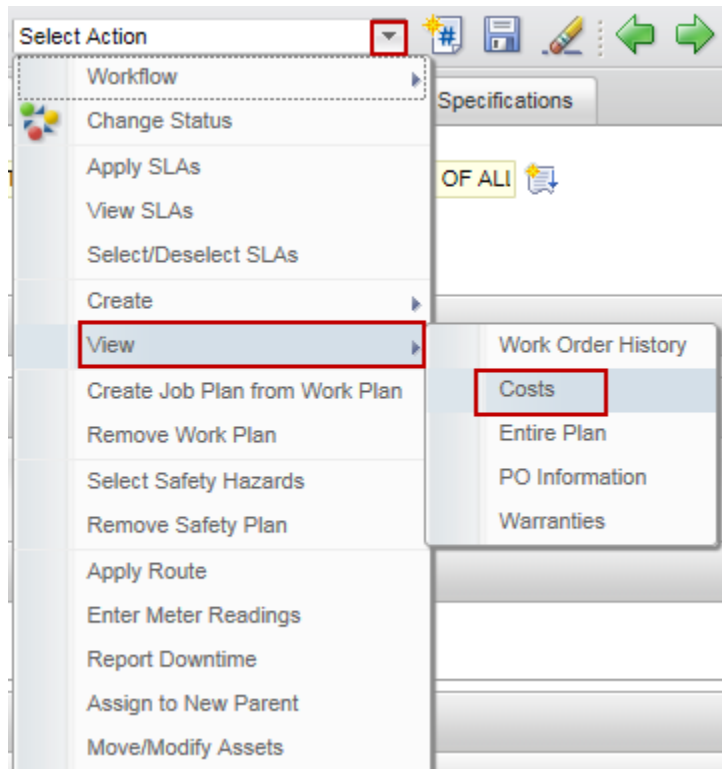


The image shows a 'Change Status' dialog box. It contains the following fields and options:

- Work Order: AB403190
- Description: Paint Wall (Your Initials)
- Status: APPR
- Current Status: APPROVED (APPR)
- * New Status: **COMPLETED** (highlighted with a red box)
- * Status Date: 09/27/2016 9:00 AM
- Memo: (empty text box)
- Print or Email Work Order Report when change status in background selected?
- Change work order status in back ground?
- Notification E-mail for Work Order Change Status: kbmerrill@dtec.com
- Buttons: **OK** (highlighted with a red box) and Cancel

18. Click **OK** to change the status to **COMPLETED** status.

19. View the Planned vs. Actual Cost for the completed work order. From the **Select Action** Menu select **View --> Costs**.



20. The system will display the **View Costs** pop-up screen. This will show the **Planned vs. Actual** costs for the work order. These values are based on the information you entered for the Plan (as part of *Exercise #1*) and what you entered in this exercise when recording the **Actuals**.

View Costs

The Work Order Totals table shows the labor and cost information for the current work order and related tasks. The Work Package Totals table shows the labor and cost information for the entire work order hierarchy, starting from the current work order.

Work Order Totals

WO Costs	Filter	1 - 10 of 10	Download	
Resource	Current Estimate	Approved Estimate	Actual	Exceeds Estimate by
Internal Labor Hours	8.00	8.00	6.00	0.00
External Labor Hours	0.00	0.00	0.00	0.00
Labor Hours	8.00	8.00	6.00	0.00
Internal Labor Cost	124.00	124.00	93.00	0.00
External Labor Cost	0.00	0.00	0.00	0.00
Labor Costs	124.00	124.00	93.00	0.00
Material Cost	45.89	45.89	70.00	24.11
Tool Costs	0.00	0.00	0.00	0.00
Service Cost	0.00	0.00	0.00	0.00
Total Cost	169.89	169.89	163.00	0.00

Work Package Totals

Work Package Costs	Filter	1 - 10 of 10	Download	
Resource	Current Estimate	Approved Estimate	Actual	Exceeds Estimate by
Internal Labor Hours	8.00	8.00	6.00	0.00
External Labor Hours	0.00	0.00	0.00	0.00
Labor Hours	8.00	8.00	6.00	0.00
Internal Labor Cost	124.00	124.00	93.00	0.00
External Labor Cost	0.00	0.00	0.00	0.00
Labor Costs	124.00	124.00	93.00	0.00
Material Costs	45.89	45.89	70.00	24.11
Tool Costs	0.00	0.00	0.00	0.00
Service Costs	0.00	0.00	0.00	0.00
Total Costs	169.89	169.89	163.00	0.00

Close

1.20 Work Orders- Student Exercise #6

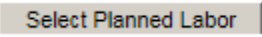
In this exercise you will enter Actuals for the three work orders you created in *Exercise #2*. Use the following information to complete this exercise:





1. Before you begin, find the work order numbers for the three work orders you created as part of *Exercise #2* (You can also search for the work orders using your initials if you put them in the work order description). See pages: 45, 46, and 47. Write them down here as this will help you complete the exercise.

Work Order Number 1: _____

Work Order Number 2: _____

Work Order Number 3: _____

2. Navigate to the **IA Work Order Tracking** application.
3. From the work order list screen, **enter the first work order number (listed above)** in the **Work Order** filter field and press the enter key. This will allow you to easily find the work order.
4. Select the work order from the List tab screen to display it.
5. Double-check to ensure the work order **Status** is **APPR**. If the status is not APPR, change the status to APPR before proceeding to the next step.
6. Select the **Actuals** tab.
7. Select the **Labor** sub-tab located at the bottom of the screen.
8. Click on the **Select Planned Labor** button  located on the lower-right side of the screen. This will display the list of crafts that were originally planned for this work (you entered these during exercise #1).
9. From the list of available crafts, select a craft that was "Planned" by clicking in the checkbox located next to the craft name.
10. Click **OK**.

11. With the cursor in the **Labor** field, click the **Detail Menu** icon  next to the **Labor** field to display the laborers associated with the craft you selected. Choose **Select Value** icon  to display the list of laborers and make your selection.
12. Enter the **Regular Hours** reported to complete the work or take the default planned hours if the actuals matches the plan.
13. Save the Work Order.
14. Select the **Materials** sub-tab located at the bottom of the screen.
15. Click on the **New Row** button  located on the lower-right side of the screen. Change **Line Type** from **Item** to **Material**
16. Enter a **Description** and **Unit Cost** for the Material
17. Save the Work Order.
18. Change the Status  of the Work Order to Complete.

To complete this exercise, repeat the above steps (starting on pg. 70) for each of the remaining two work orders you created as part of *Exercise #2*.