

Job Plans Training Manual

Prepared by:



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Maximo Production URL: <https://maximo.bia.gov/maximo>

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1 Job Plans

1.1 Objectives

- Describe the IA Job Plans application and its uses
- Understand the relationship between IA Job Plans and Work Orders and PM's
- Create IA Job Plan records
- Duplicate IA Job Plans
- Revise IA Job Plans

1.2 Understanding the IA Job Plans Application

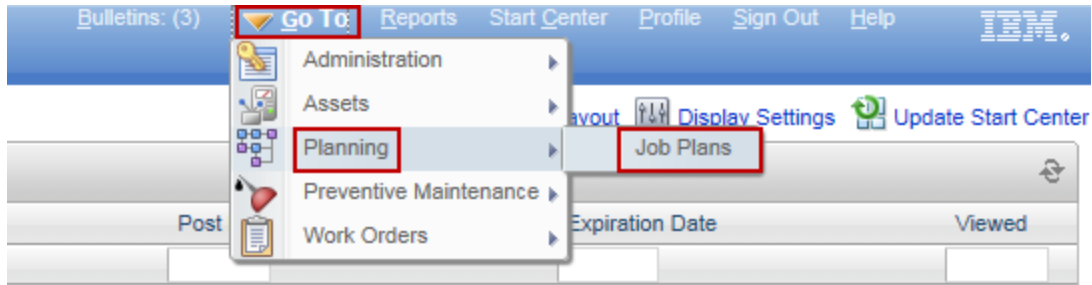
A Job Plan is a detailed description of the work tasks (operations), labor, material, and tools to be performed for a particular type of job. Use Job Plans as templates for work order-specific work plans.

You use the IA Job Plans application to create, modify or revise job plan records. A job plan is a detailed description of work to be performed for a work order. You can copy job plans to PM records, routes, and directly to work orders. After a job plan becomes a work plan on a work order, you can modify the work plan without affecting the job plan.

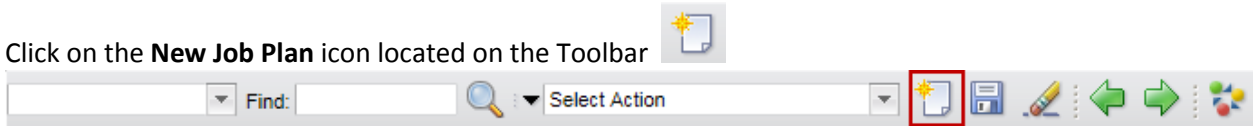
Job plans generally contain tasks (procedures), along with lists of estimated labor, labor hours, materials, services, and tools required for the work. To ensure that work on an asset is performed in safe manner, you can add work assets and associate safety plans that can be used when work is performed.

1.3 Creating a Job Plan Record

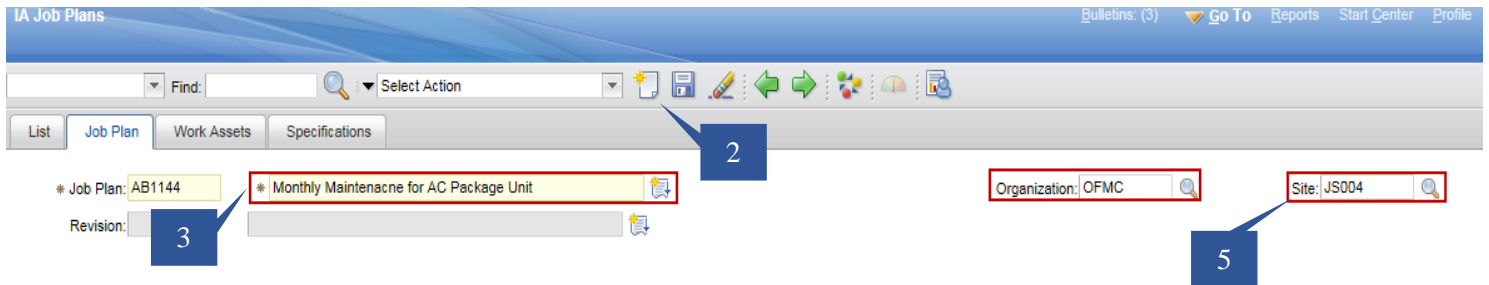
1. Navigate to the **IA Job Plans** application.



2. Click on the **New Job Plan** icon located on the Toolbar



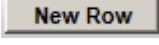
3. Enter a **Description** for the Job Plan (as illustrated below).
4. Enter OFMC as the **Organization**.
5. Enter your **Site**. *If a Site is entered in this field then only this site can use the Job Plan. If the Site is left blank then other sites can use this Job Plan.*



6. Make note of the auto-assigned unique Job Plan Number: _____
(your number will differ from the one illustrated above).


7. Enter Task Description(s) if necessary.

The screenshot shows the 'Details' panel on the left with fields for Status (DRAFT), Template Type (Maintenance), Duration (0:00), Classification, Class Description, Launch Entry Name, and constraint offsets. The 'Responsibility' panel on the right has fields for Supervisor, Crew, Lead, Work Group, Owner, and Owner Group. The 'Job Plan Tasks' table below has columns for Sequence, Task, Description, Nested Job Plan, Duration, and Meter. The first four rows are: 10 Disconnect Power., 20 Use pressurized air to blow our AC water drain line., 30 Replace Air Filter., and 40 Re-connect Power. A red box highlights the 'Task' and 'Description' columns. A blue callout '7' points to the 'Description' column. At the bottom right, a 'New Row' button is highlighted with a blue callout '8'.

8. Select the New Row icon  in the **Job Plans Task** section to add additional tasks.

9. Save  the record.


10. Planned Labor is required add them in the same manner as when entering Planned Labor on a work order.

- a. Select the **Labor** sub-tab.
- b. Select **New Row**.
- c. Select **Craft**.
- d. Enter **Hours** required to perform the work.
- e. Save  the record.

This screenshot shows the 'Job Plan Tasks' table with the same four tasks as in the previous screenshot. The 'New Row' button is visible at the bottom right.

The screenshot shows the 'Planned Labor' sub-tab. The 'Labor' sub-tab is selected. A table shows one row of labor with Craft: ACMECH, Skill Level, Labor, Quantity: 1, Hours: 1:00, Rate: 26.00, and Line Cost: 26.00. A 'Details' panel below shows Organization: OFMC, Site, Task, Labor, Craft: ACMECH, Skill Level, Vendor, and Labor Contract. A blue callout '10a' points to the 'Labor' sub-tab. A blue callout '10d' points to the 'Hours' field in the table. A blue callout '10b' points to the 'New Row' button.

11. **Materials** can only be added to a Job Plan if the items exist in a Storeroom.

- f. Select the **Materials** sub-tab.
- g. Select **New Row**.
- h. Select the **Item Number**.
- i. Enter **Item Quantity**.
- j. Save  the record.

Sequence	Task	Description	Nested Job Plan	Duration	Meter
10		Disconnect Power.		0:00	
20		Use pressurized air to blow our AC water drain line.		0:00	
30		Replace Air Filter.		0:00	
40		Re-connect Power.		0:00	

Planned Materials

Task	Description	Storeroom	Item Quantity	Unit Cost	Line Cost	Vendor
AB100002	Air Filter For H&V System 14X25X2		1.00	0.00	0.00	

Details

Organization: * Item Set: OFMCITEM OFMC ItemSet Storeroom:

Site: * Item: AB100002 Air Filter For H&V System 14X25X2 Storeroom Site:

Task: * Item Quantity: 1.00 Vendor: Unit Cost: 0.00


Direct Issue? Condition Rate: Line Cost: 0.00

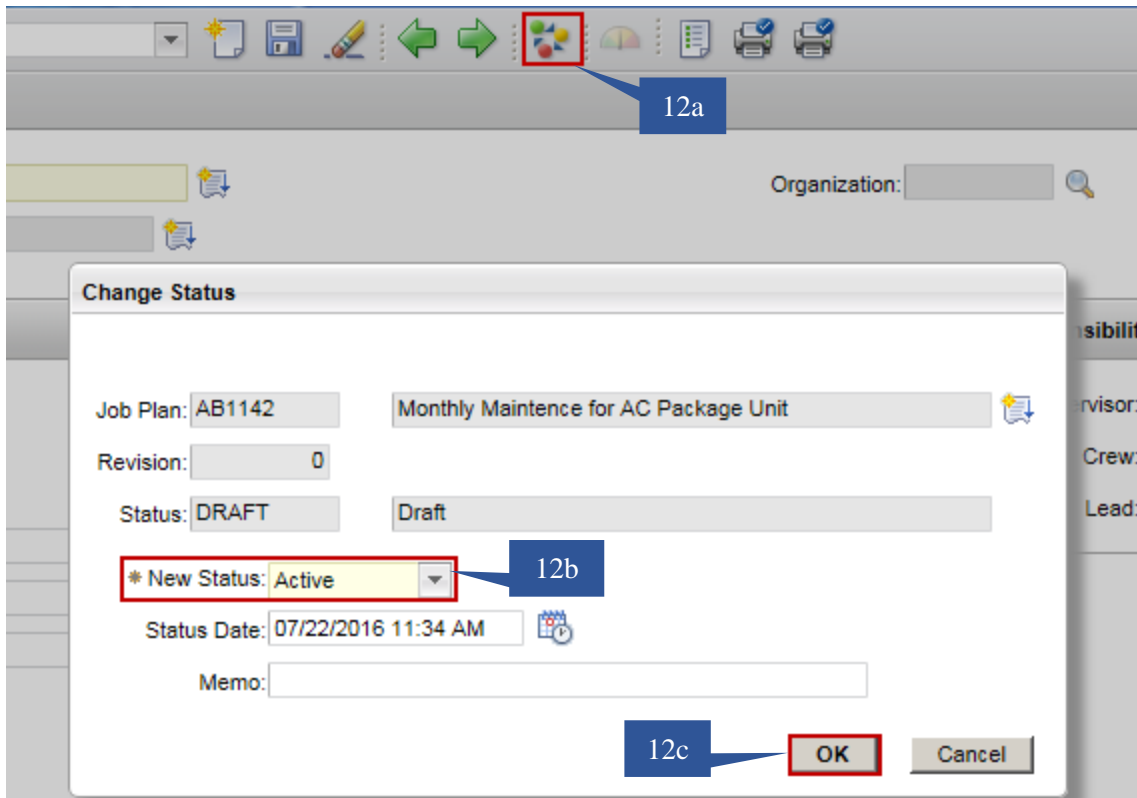
Condition

Condition Enabled? Condition Code: Stock Category:

Select Spare Parts **New Row**

12. Change the Job Plan Status to **Active**.

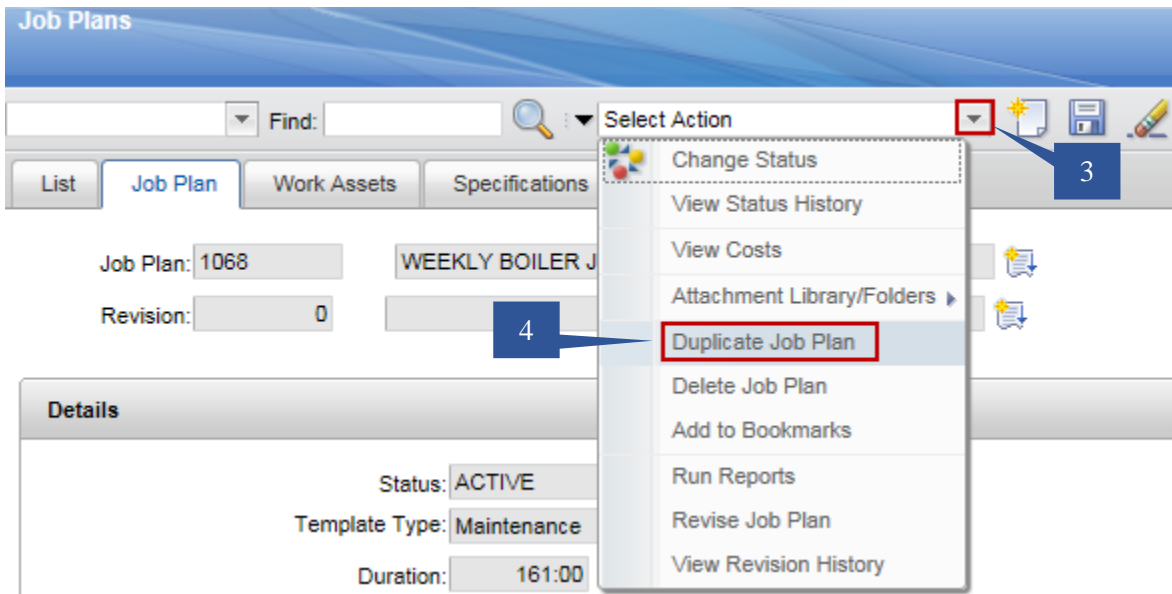
- k. Click on the Change Status icon .
- l. Select **Active** for the New Status.
- m. Click on **OK**.



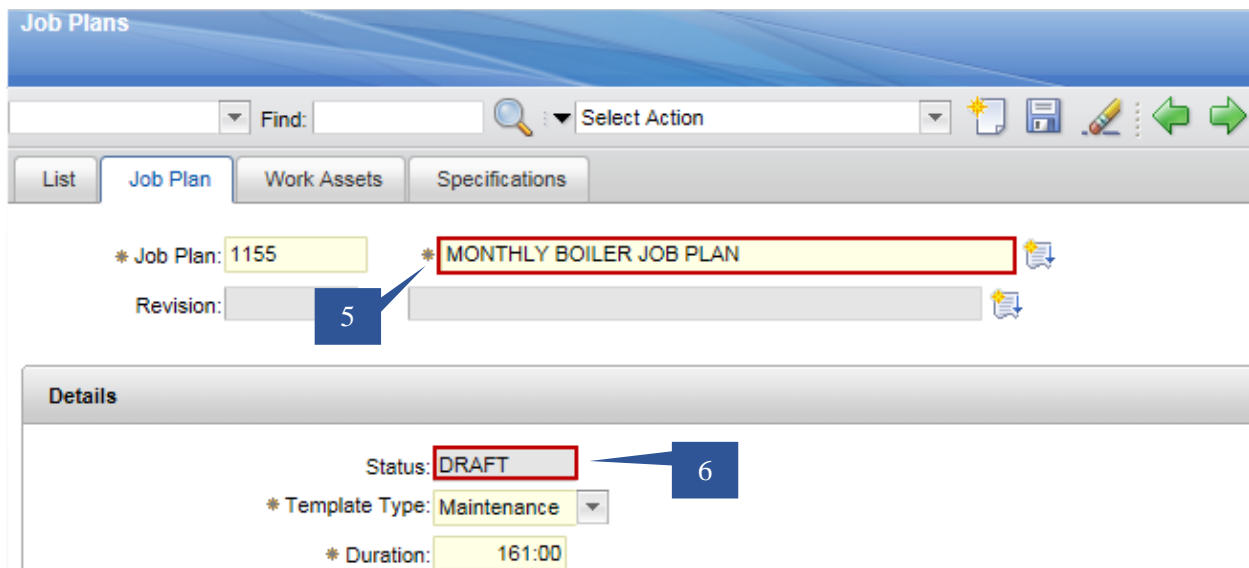
1.4 Duplicating a Job Plan Record

Oftentimes you may want to duplicate a previously created Job Plan record and modify the tasks, Craft or Materials requirement and apply it to a different PM or Work Order. *You should not duplicate a Job Plan if the Job Plan is currently used on a PM. To modify Job Plans that are currently used on a PM a Job Plan Revision is required. See the Job Plan Revision section of this document.* The procedure to duplicate the Job Plan is as follows.

1. From the Go To menu, navigate to the **IA Job Plan** application located within the Planning Module.
2. Find and open the Job Plan record you wish to duplicate.
3. Click on the **Select Action** menu.
4. Select **Duplicate Job Plan**.



- 5) Update the **Description** if necessary.



- 6) The Job Plan Status is **DRAFT**.

Job Plan Tasks

Sequence	Task	Description	Nested Job Plan	Duration	Meter
	10	Disconnect Power.		0:00	>>
	20	Use pressurized air to blow our AC water drain line.		0:00	>>
	30	Replace Air Filter.		0:00	>>
	40	Re-connect Power.		0:00	>>

Planned Labor

Task	Craft	Skill Level	Labor	Quantity	Hours	Rate	Line Cost
ACMECH				1	2.00	26.00	52.00
ELEC				1	0.30	22.75	11.38

Details

Organization: OFMC
 Site:
 Task:
 Labor:
 Craft: ELEC Electrician 1st Class
 Skill Level:
 Vendor:
 Labor Contract:
 Quantity: 1
 Hours: 0.30
 Rate: 22.75
 Line Cost: 11.38

- 7) Task Descriptions can be updated and additional task can be added.
- 8) Planned Labor can be updates as well.
 - a. Enter updates to hours for existing Crafts.
 - b. Add additional Craft Code and Hours

Save  the record.

Planned Materials

Task	Item	Description	Storeroom	Item Quantity	Unit Cost	Line Cost	Vendor
AB100002		Air Filter For H&V System 14X25X2		2.00	0.00	0.00	>>
AB100040		12W Ground Wire		1.00	0.00	0.00	>>

Details


Organization:
 Site:
 Task:
 * Item Set: OFMCITEM OFMC ItemSet
 * Item: AB100040 12W Ground Wire
 * Item Quantity: 1.00
 Vendor:
 Direct Issue?
 Storeroom:
 Storeroom Site:
 Unit Cost: 0.00
 Line Cost: 0.00

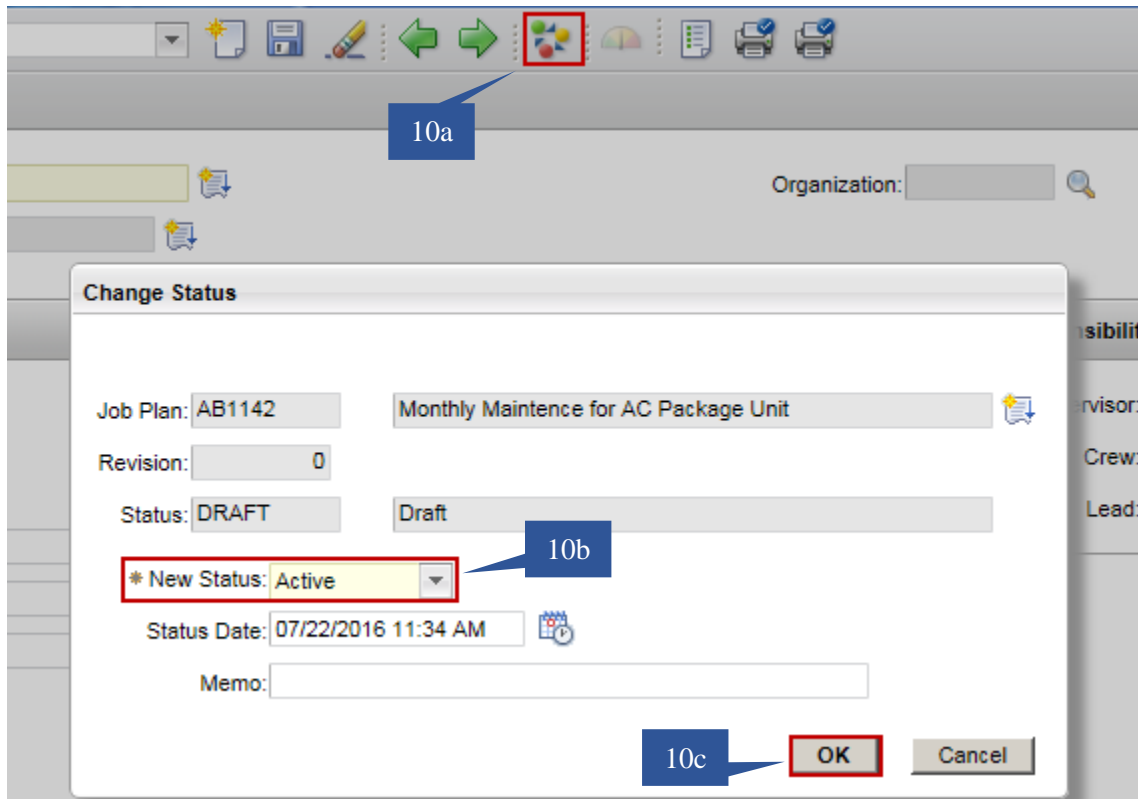
Condition

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

- 9) Planned Labor can be updates as well.
 - a. Enter updates to Quantities for existing Materials.
 - b. Add additional Materials and Quantities.

10. Change the Job Plan Status to **Active**.

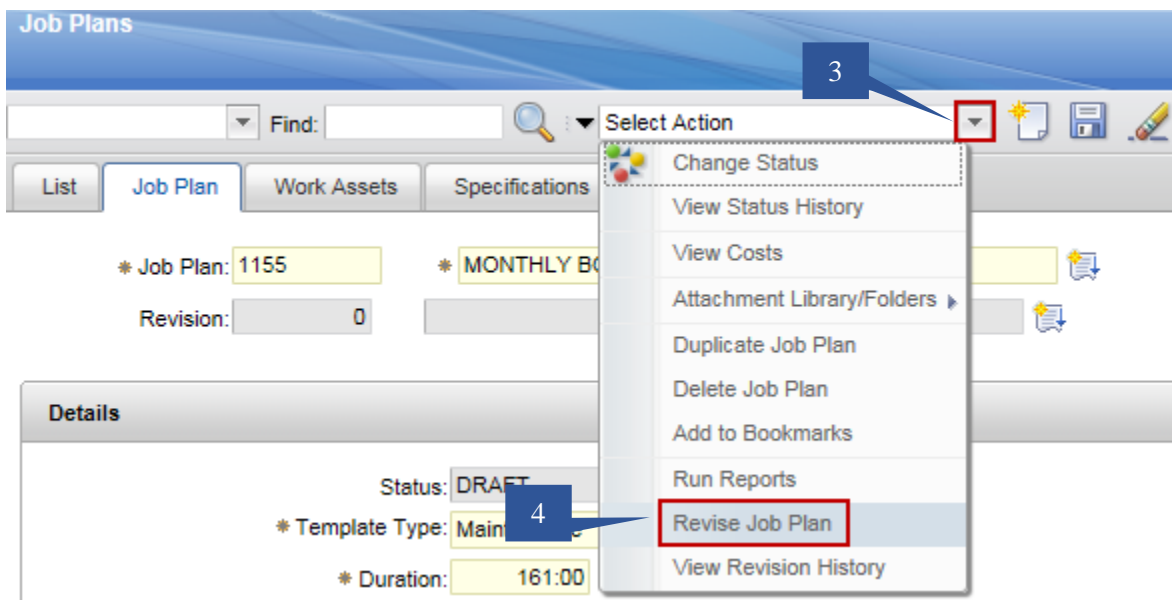
- a. Click on the Change Status icon .
- b. Select **Active** for the New Status.
- c. Click on **OK**.



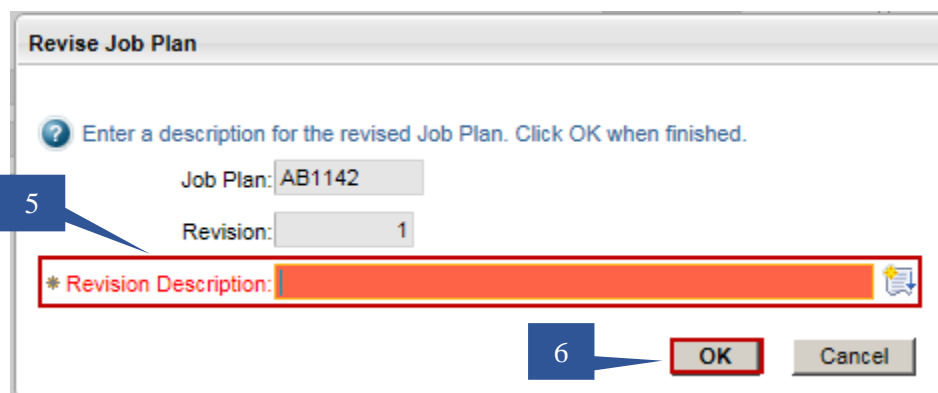
1.5 Revising a Job Plan record.

A Job Plan can be revised when it has been determined that a Job Plan requires a modification.

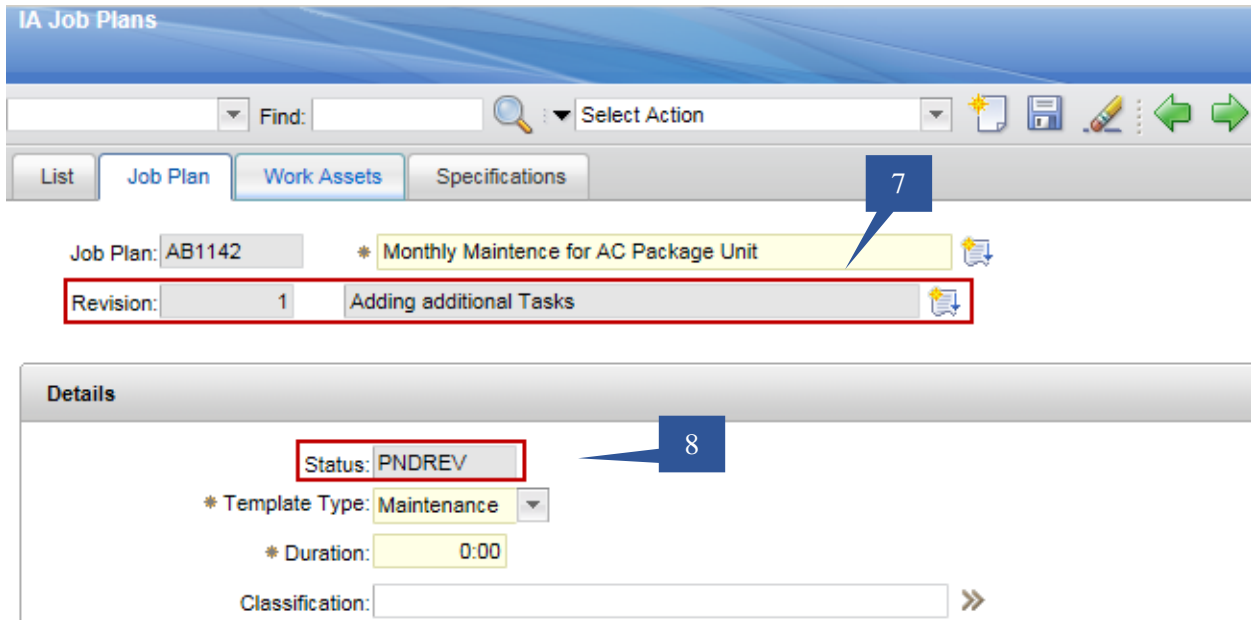
- 1) From the **Go To** Menu, navigate to the **IA Job Plans** application located within the Planning Module.
- 2) Select the **Job Plan** to revise.
- 3) Click on **Select Action**.
- 4) Click on **Revise Job Plan**.




- 5) Provide a reason for the revision in the **Revision Description** field.
- 6) Click **OK**.

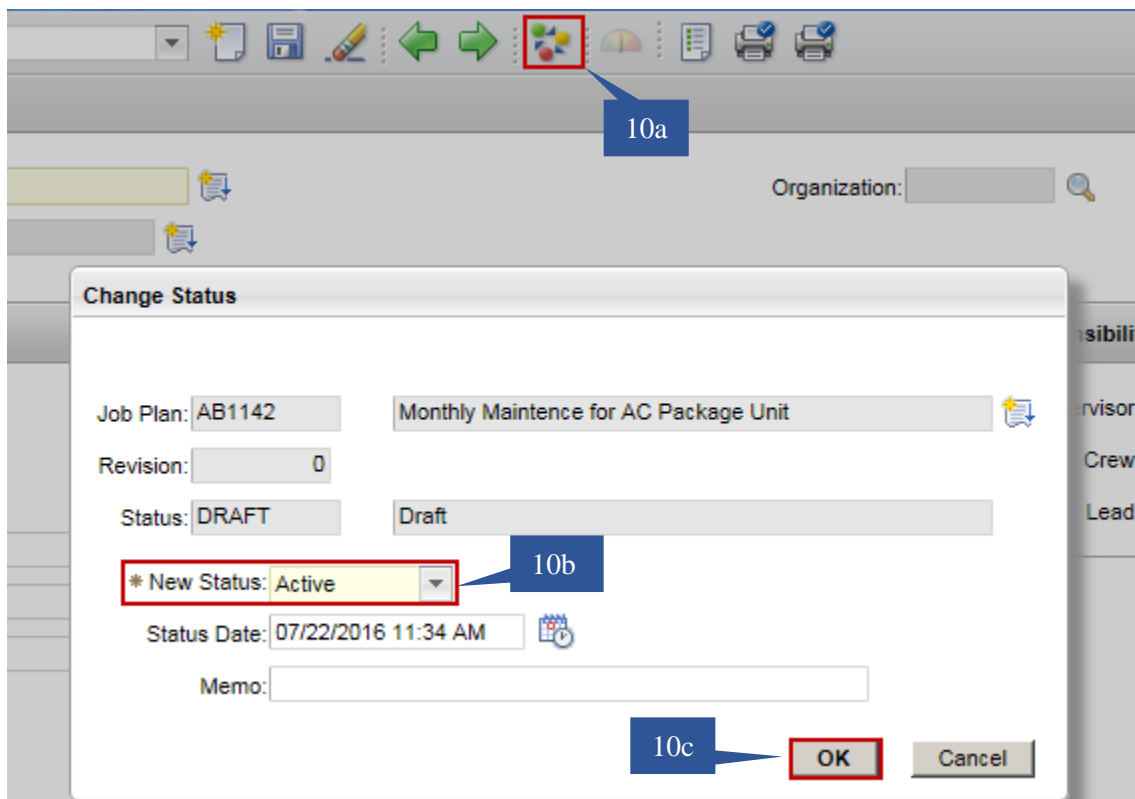


- 7) The revision number and description will not appear below the Job Plan field.
- 8) The Status of the Job Plan is **PNDREV** (Pending Revision). The Job Plan cannot be applied within any IA-FMS application when in this Status.



- 9) While in the PNDREV status modifications can be made to the Job Plan to include: Tasks, Planned Labor, and Planned Materials.
- 10) Once the revisions have been made change the Status to ACTIVE.

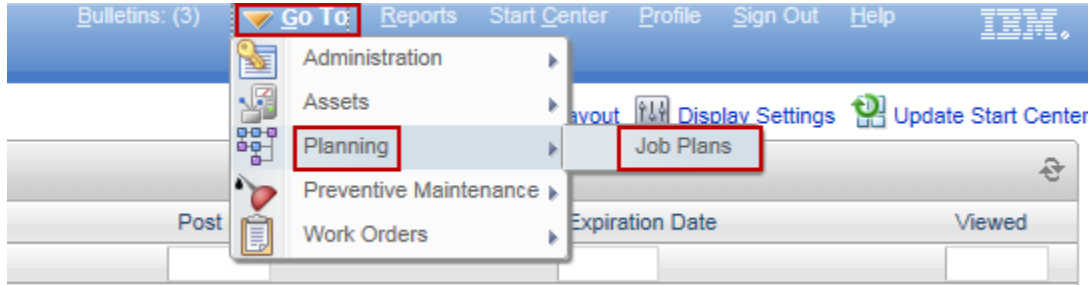
- a) Click on the Change Status icon .
- b) Select **Active** for the New Status.
- c) Click on **OK**.



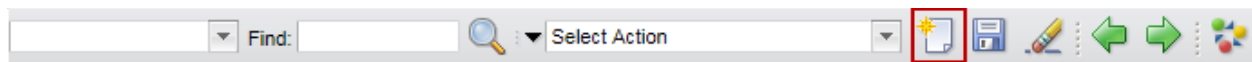
1.6 Student Exercise #1 - Creating a Job Plan

In this exercise you will create a basic **Job Plan** record to maintain an AC Package Unit. Use the following steps:

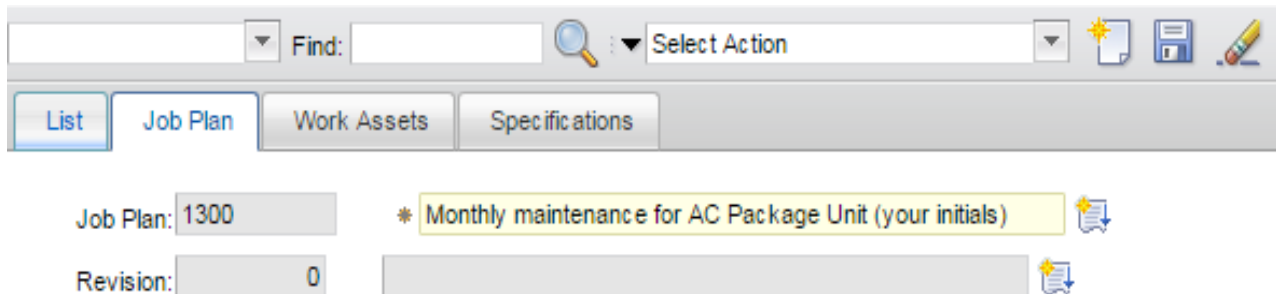
- 1) Navigate to the **IA Job Plans** application.



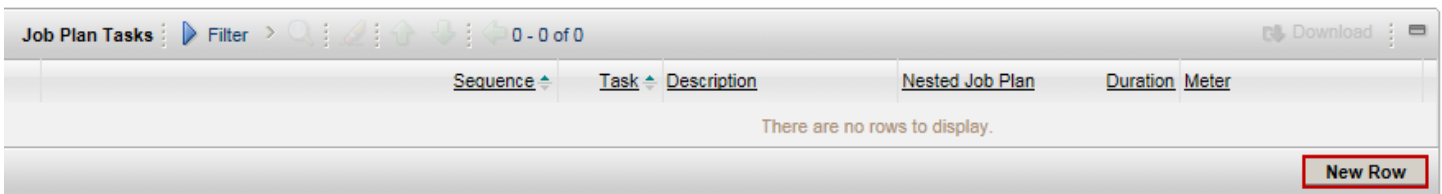
- 2) Click on the **New Job Plans** icon located on the Toolbar. Job Plan number _____



- 3) Enter a brief **Description:** *Monthly Maintenance for Emergency Gen. (your initials).*



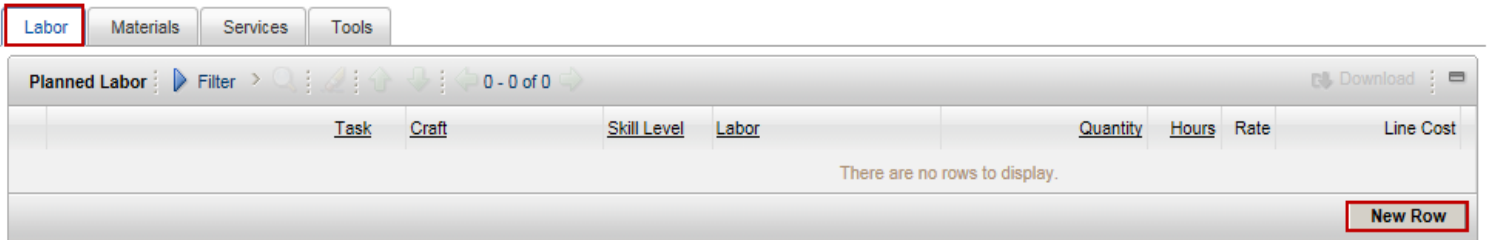
- 4) Enter Job Plan tasks by clicking on the **New Row** push button in the **Job Plans Task** Section.



- 5) Enter the following four (4) Tasks:

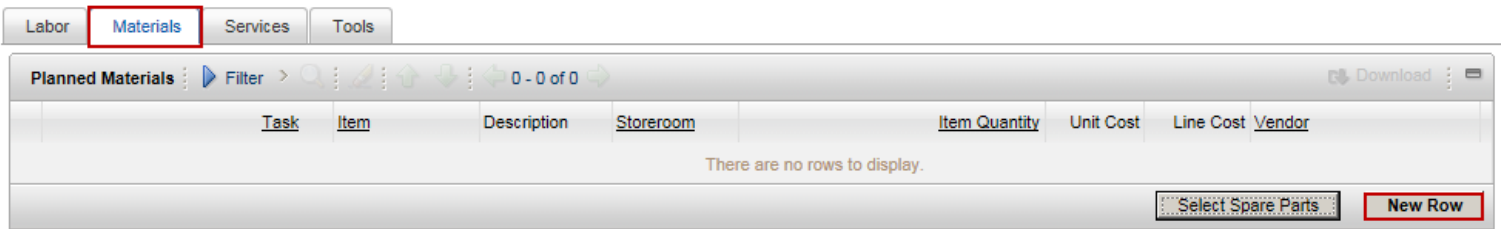
- 10 - Disconnect Power.
- 20 – Use pressurized air to blow out AC drain line.
- 30 – Replace Air Filter.
- 40 – Re-connect power.

- 6) Click on the **Labor sub-tab** to add a Craft.
- 7) Select **New Row**.





- a) Enter: Craft – ACMECH, 2 Hours.

- 8) Click on the **Materials sub-tab**.
- 9) Select **New Row**.



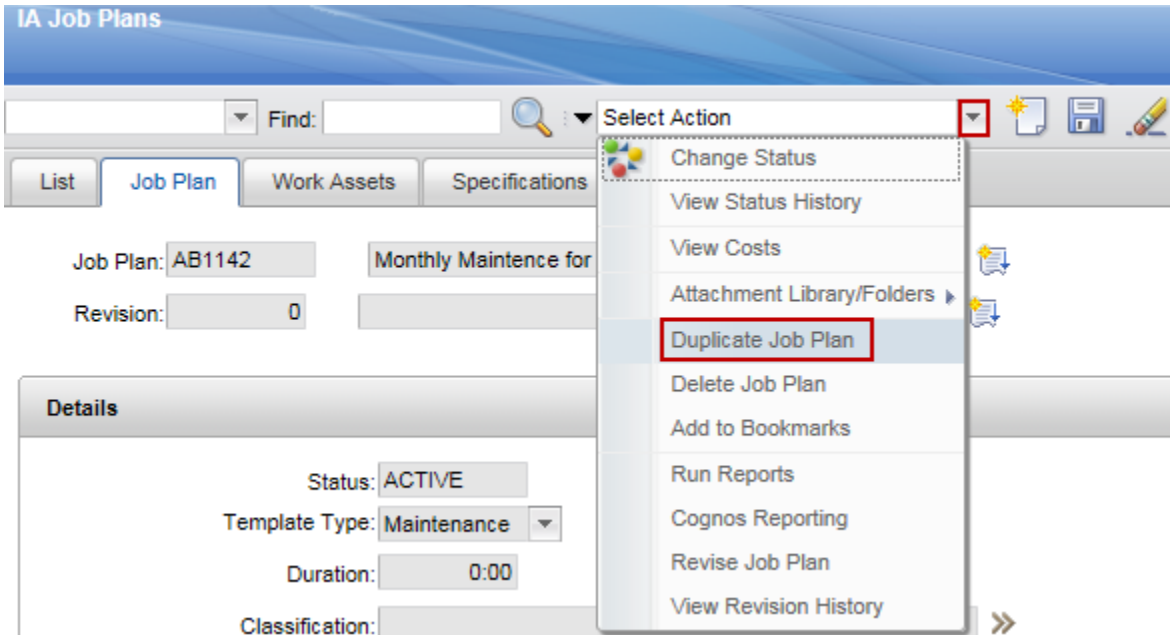
- a) Add an item: AB100002 – Air Filter For H&V System 14x25x2, Qty. - 2

- 8) Save  the record.
- 9) Change the status  to **Active**.



1.7 Student Exercise #2 - Duplicating a Job Plan

In this exercise you will **Duplicate** the **Job Plan** created in the previous exercise. Use the following steps:

- 1) Locate the (previous) Job Plan in the **IA Job Plans** application.
- 2) Click on the **Select Action** arrow and select **Duplicate Job Plan**. Job Plan number _____



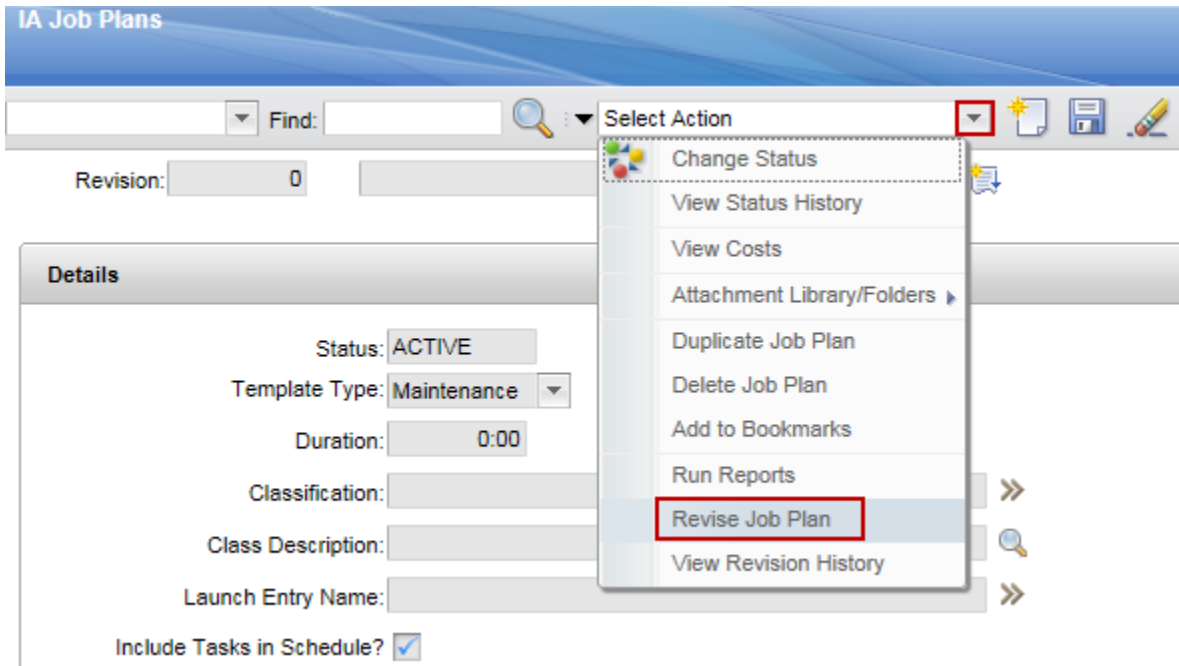
- 3) Update the Job Plan Description by replacing the word 'Monthly' with 'Semi-Annually'.
- 4) Add Task:

50 – Inspect Compressor wiring.
- 5) Save  the record.
- 6) Change the Status  to **ACTIVE**.

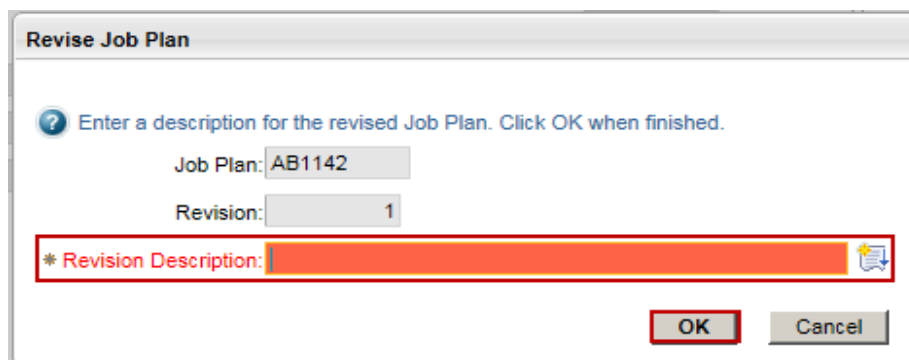
1.8 Student Exercise #3 - Revising a Job Plan



In this exercise you will Revise the **Job Plan** created in the previous exercise. Use the following steps:

- 1) Locate the (previous) Job Plan in the **IA Job Plans** application.
- 2) Click on the **Select Action** arrow and select **Revise Job Plan**.



- 3) Enter reason for Revision ('Adding ELEC Craft').
- 4) Click **OK**.



- 5) Click on the **Labor sub-tab**.
- 6) Add **New Row**.
- 7) Add **ELEC Craft** with **1** hour.
- 8) Save  the record.
- 9) Change the Status  to **ACTIVE**.