DM Work Orders
Training Manual

Prepared by:

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1.1 Objectives

- Understand the purpose and use of the IA Deferred Maintenance Tracking application within Maximo.
- Understand the relationship between Maximo and FMIS as it relates to Backlogs, Work Tickets, and Deferred Maintenance.
- Describe the difference between the IA Work Order Tracking and Deferred Maintenance Tracking applications and what data is displayed in each.
- Use the IA Deferred Maintenance Work Order Tracking Application.

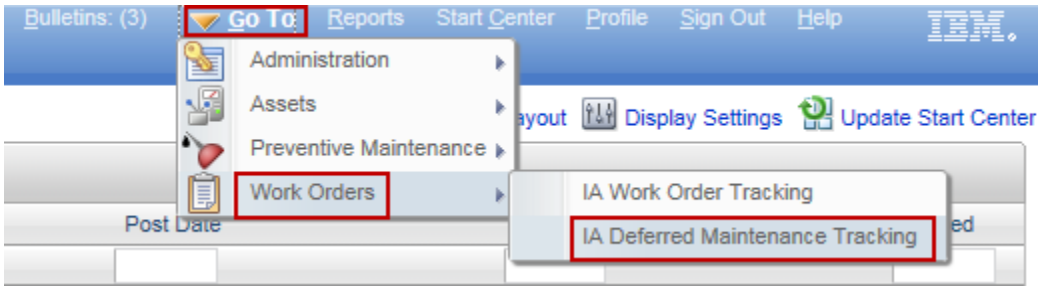
1.2 Introduction to the IA Deferred Maintenance Tracking Application

The IA Deferred Maintenance application within Maximo is used to track and manage the execution of all deferred maintenance work orders, formerly known as backlogs.

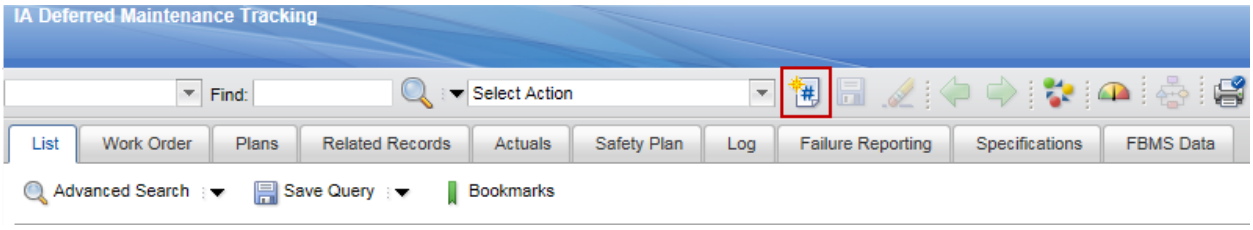
Deferred maintenance work orders can originate from the S&CAP application or can be entered directly into Maximo. Once in Maximo, these work orders are imported into the BPERM application where they will receive final approval and funding advice. Once funded, DM work orders within Maximo can be executed and the work can be captured and reported.

1.3 Creating a Deferred Maintenance (DM) Non-Emergency Work Order

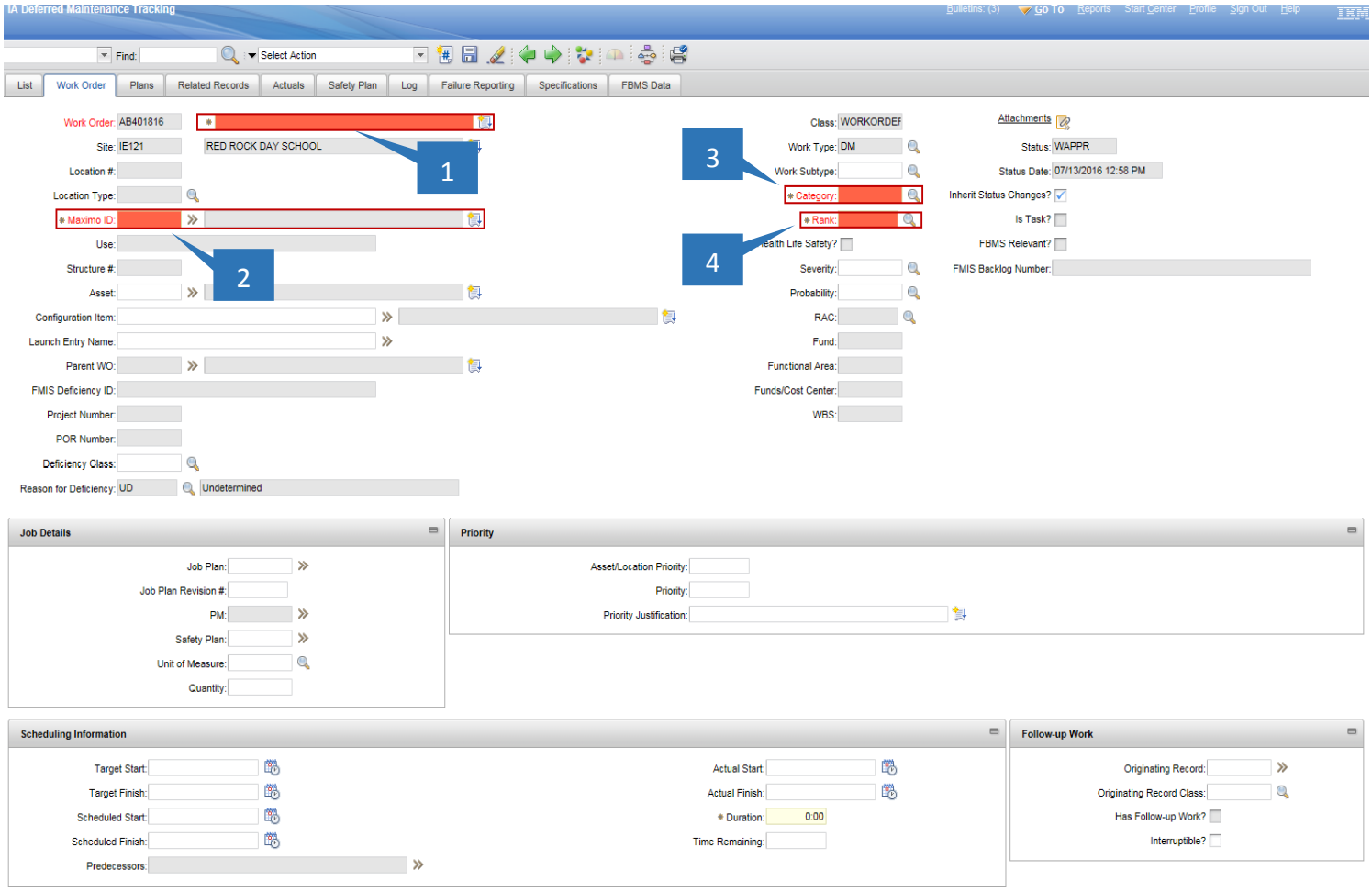
1) Navigate to the **IA Deferred Maintenance Tracking** application.



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



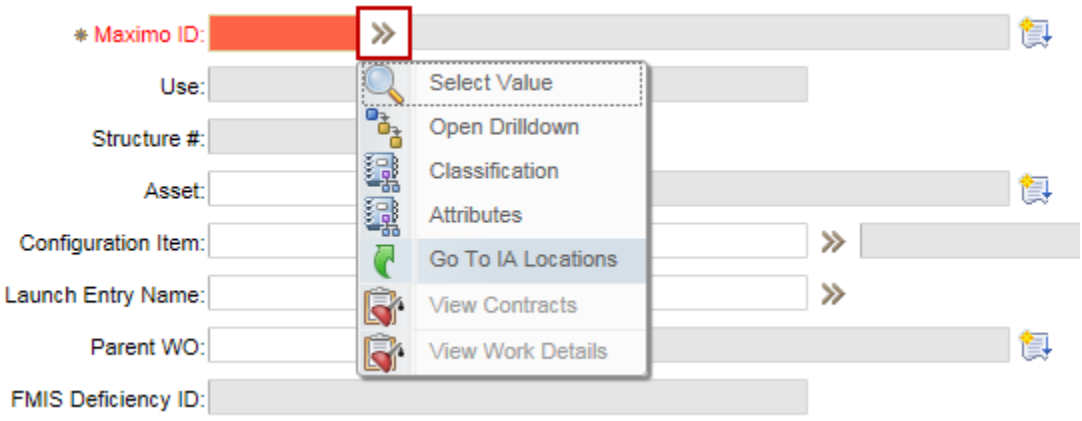
Required fields are indicated by a red (*) asterisk and red field shading. Examples of required fields in a work order are Work Order Description, Maximo ID (location where work needs to take place), Category and Rank.



1) 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.

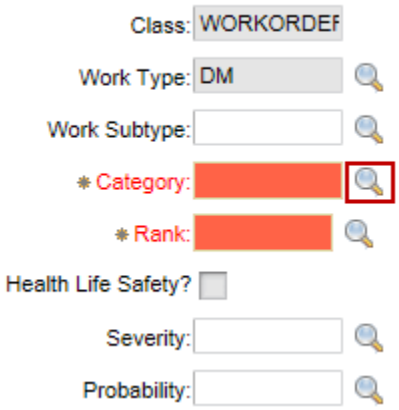
2) To enter or choose a Maximo ID (aka the location), select the Detail Menu icon » next to the field.

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

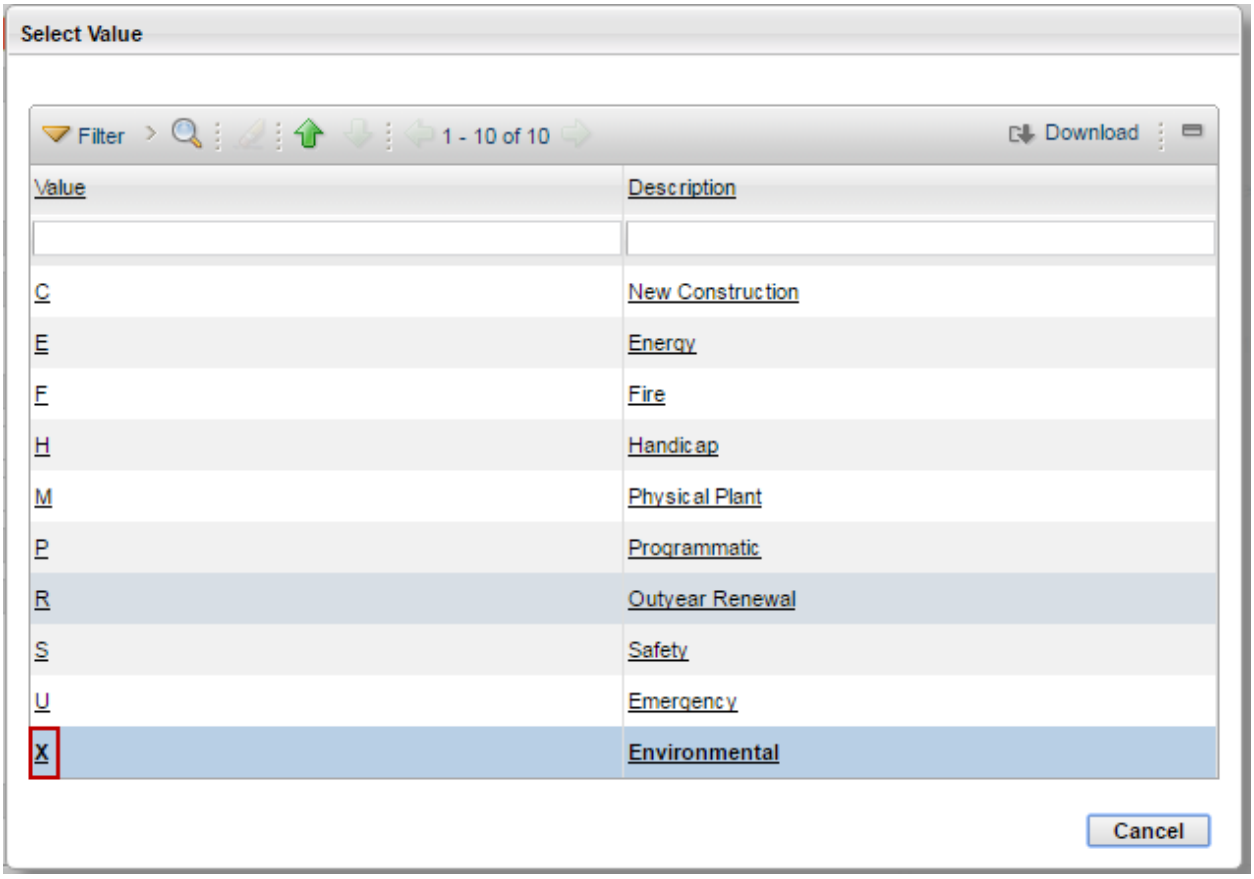


3) Select the Work Order **Category**.

   a) Within a work order, click on the Select Value icon to display the pop-up window with a list of available Categories.



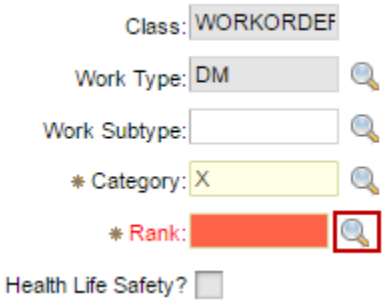
Note: The Emergency (U) Category is only applied to DM Emergency Work Orders as discussed in the DM Emergency WO section of this training manual.

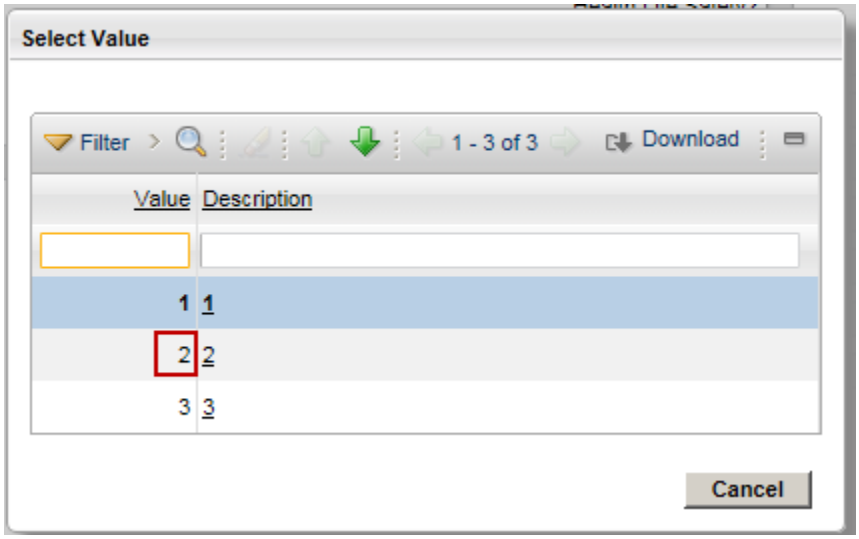


b) Select **Category.**

4) Select a **Rank**.

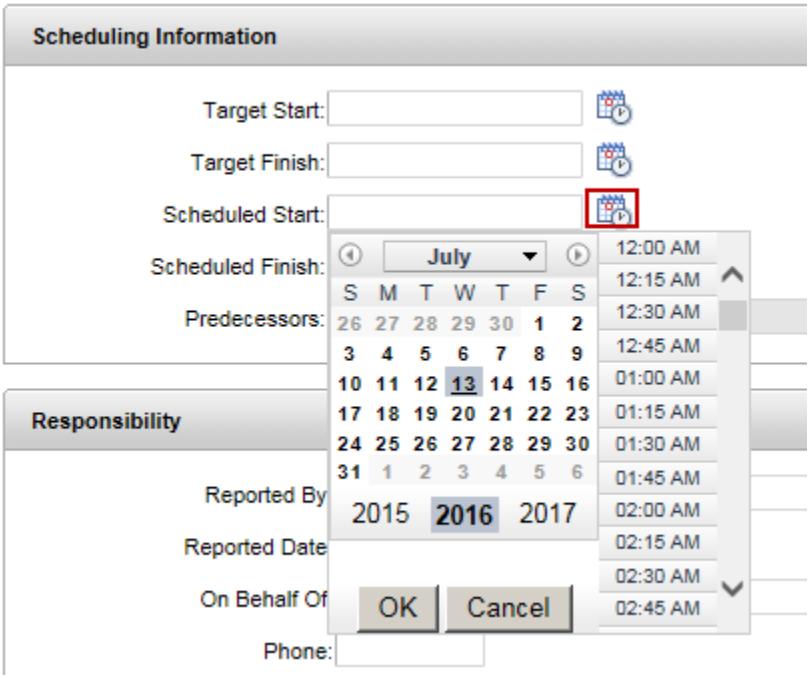
a. Within a work order, click on the Select Value icon  to display the pop-up window with a list of available Ranks.





5) The **Scheduled Start** and **Scheduled Finish** dates are important for planning and reporting. Complete additional fields for greater planning and reporting options (Not shown).

   a. Within a work order, click on the Calendar icon to display the pop-up window with a list of available dates and times.



6) Click the **Save** icon .

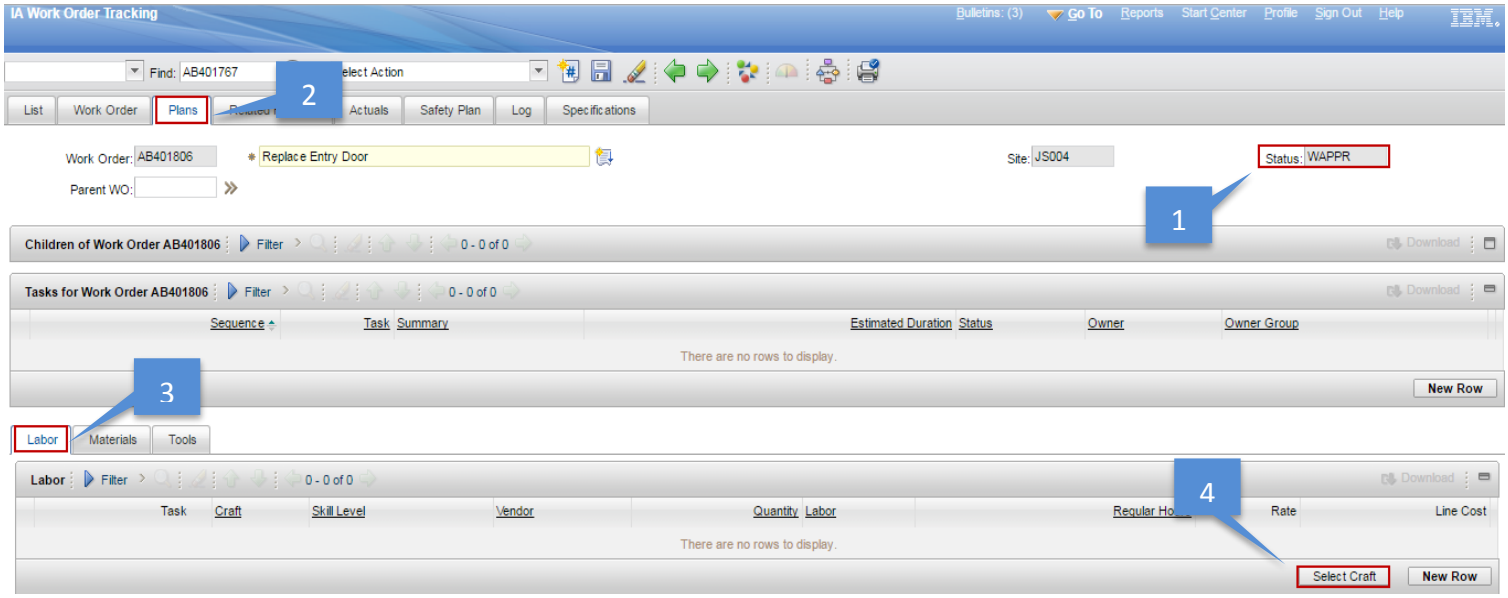
1.4 Planning Labor, and Materials (Plans Tab)

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, labor, and materials.

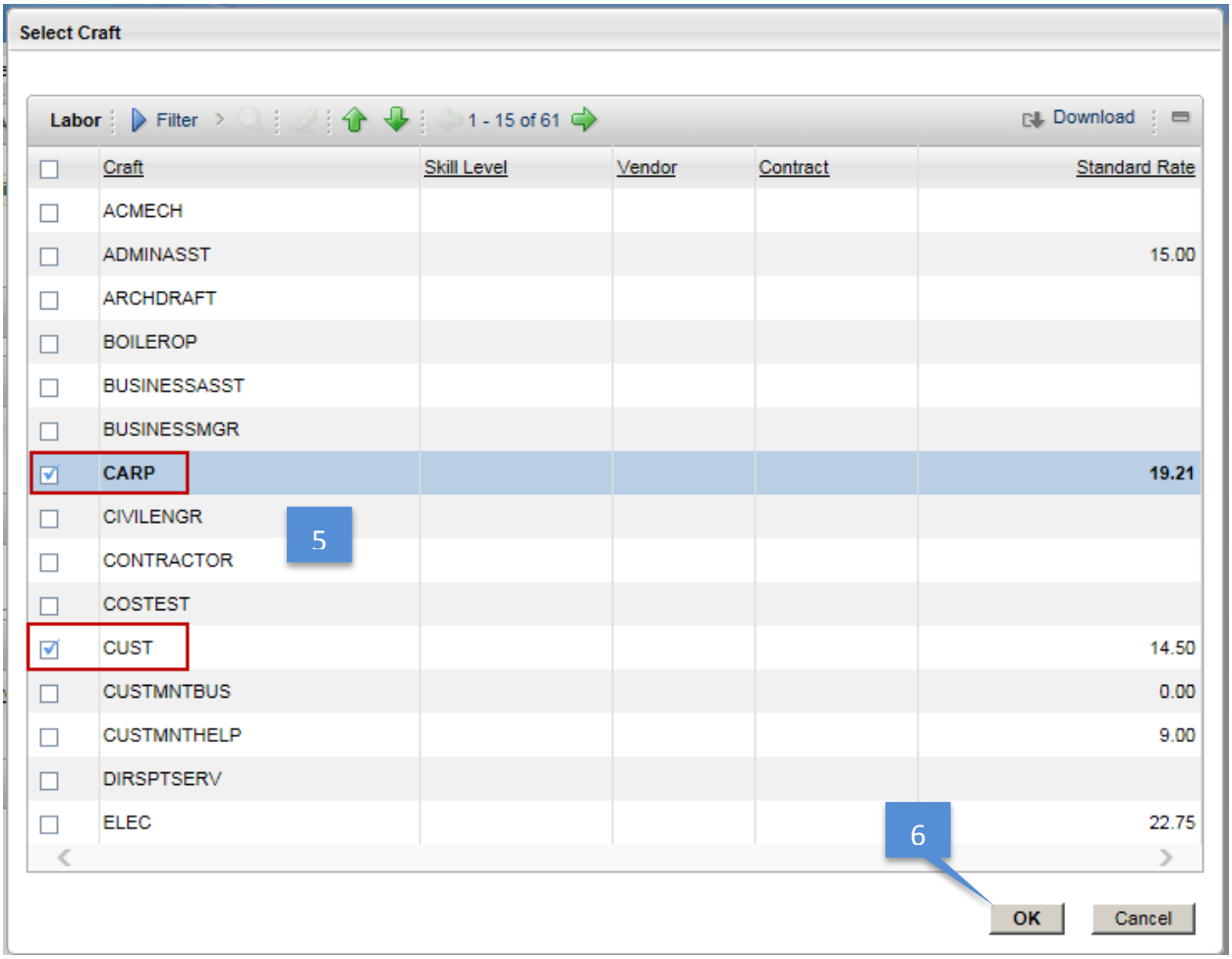
Note: Labor Planning in Maximo is done by Craft not by Person.

Adding Planned Labor

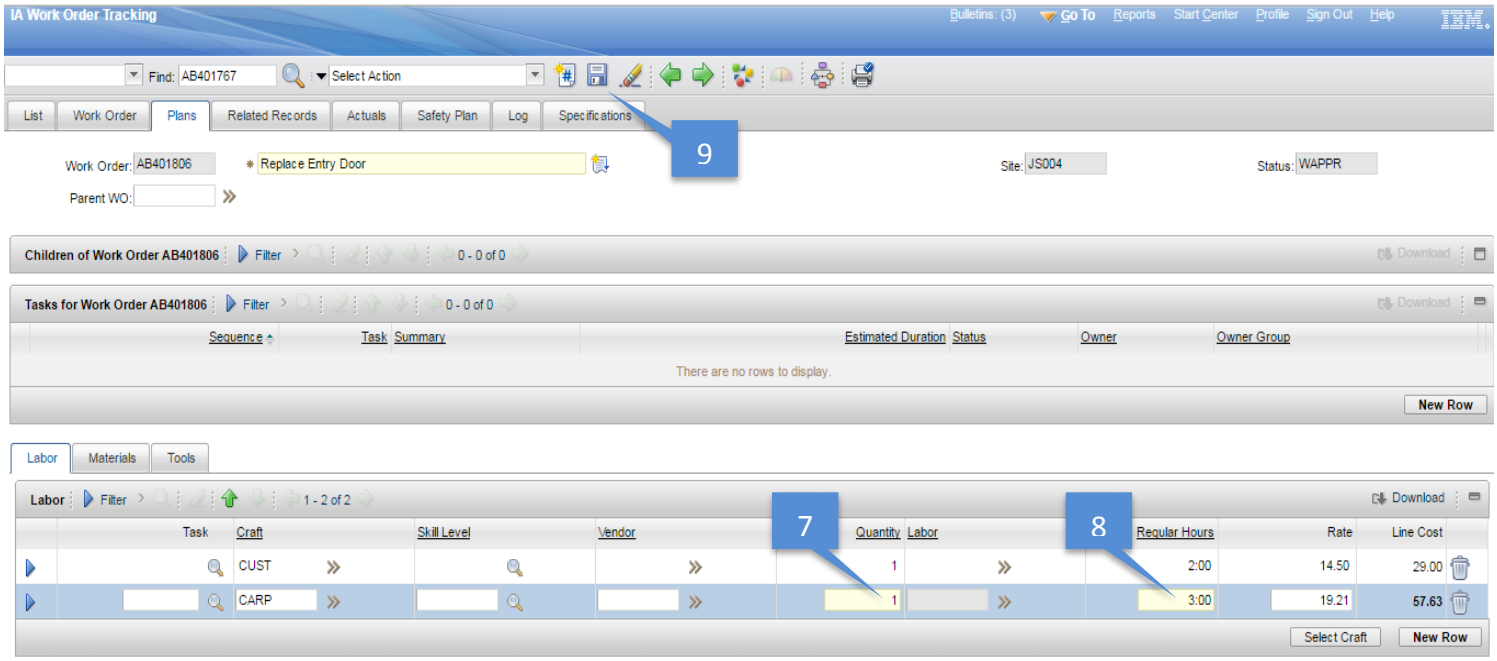
1) Find the work order to which you will be adding planned labor. Remember, the work order status **must be** WAPPR. Once a work order is approve (APPR), planned labor, material, or tools cannot be added.
2) Select the **Plans** tab.



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

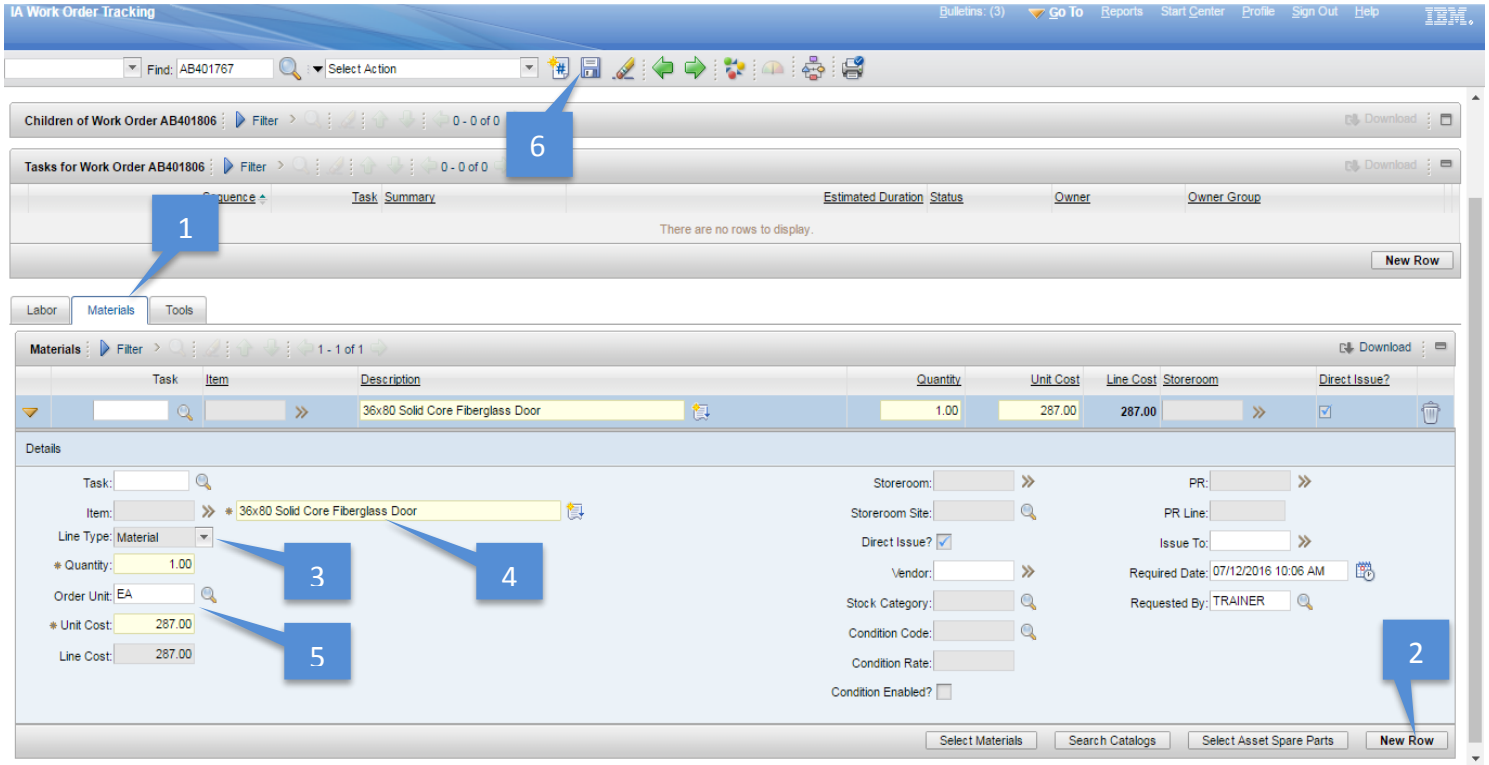


5) Check the box(s) to select the Craft(s) that are planned for this work order.
6) Click **OK**.



7) Enter the Craft Quantity.
8) Enter the Regular Hours.
9) Click on **Save.**

Adding Planned Material

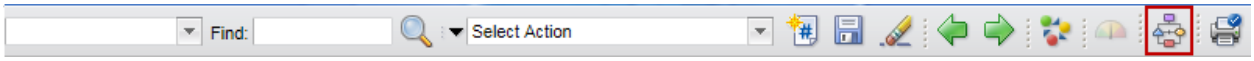


1) Select the **Materials** sub-tab.
2) Select **New Row.**
3) Change the **Line Type** to "Material".
4) Enter a **Description** for the planned material.

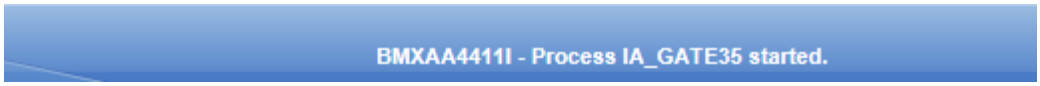
5) Enter a **Quantity & Unit Cost.**
6) Click **Save.**

1.5 Submitting a DM Work Order for Review (The 'Gatekeeper' Process).

The Status of a DM Work Order cannot be changed. The DM Work Order Approval process requires additional authorization. In order to direct this work order to the proper authority a tool called Workflow is incorporated to automate the process. To submit a DM work for approval all the user has to do is select the Workflow icon  at the top of the screen in the Tool Bar:



After selecting the Workflow icon  the user will see a message at the top of the screen (above the Tool Bar) that says:



2 Emergency Deferred Maintenance (DM) Work Orders Introduction

The IA Deferred Maintenance application within Maximo ensures the users that emergency funding will continue to be handled expeditiously. It provides the steps necessary to exhibit the emergency work order creation in IA-FMS (Maximo) through the creation of the FBMS Entry Document (FED) in IA-FMS (BPERM).

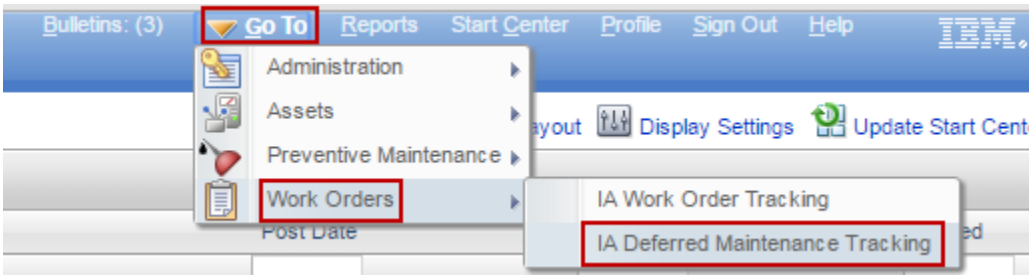
2.1 Outline

The steps to create an emergency DM Work Order are as follows:

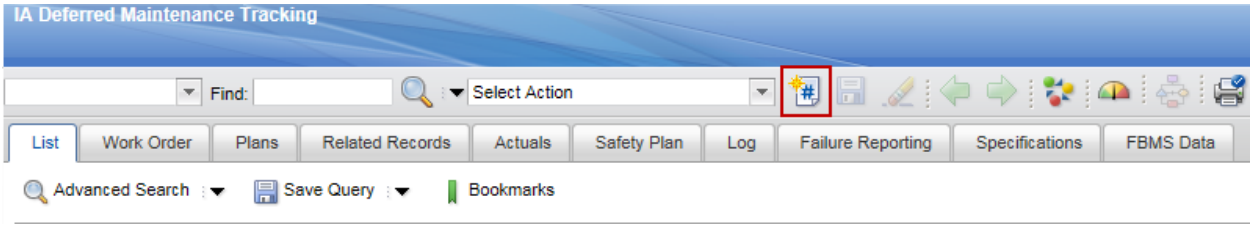
1. Create an emergency Deferred Maintenance (DM) work order (WO) in IA-FMS (Maximo)
2. Add information to the Plans tab for services labor, materials, and crafts.
3. Submit the DM work order for review in the 'Gatekeeper' process.

2.2 Creating a Deferred Maintenance (DM) Work Order

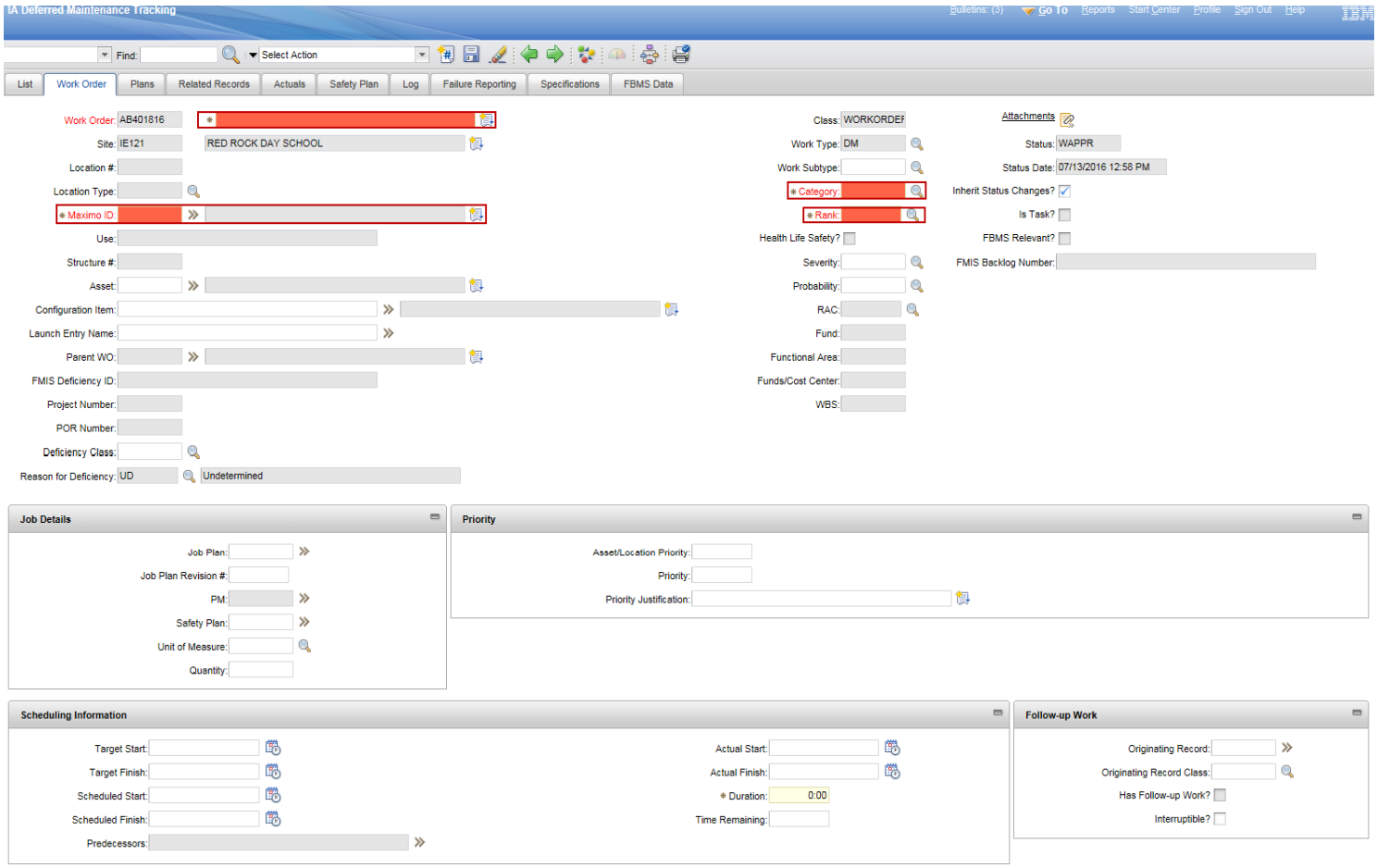
1) Navigate to the **IA Deferred Maintenance Tracking** application.



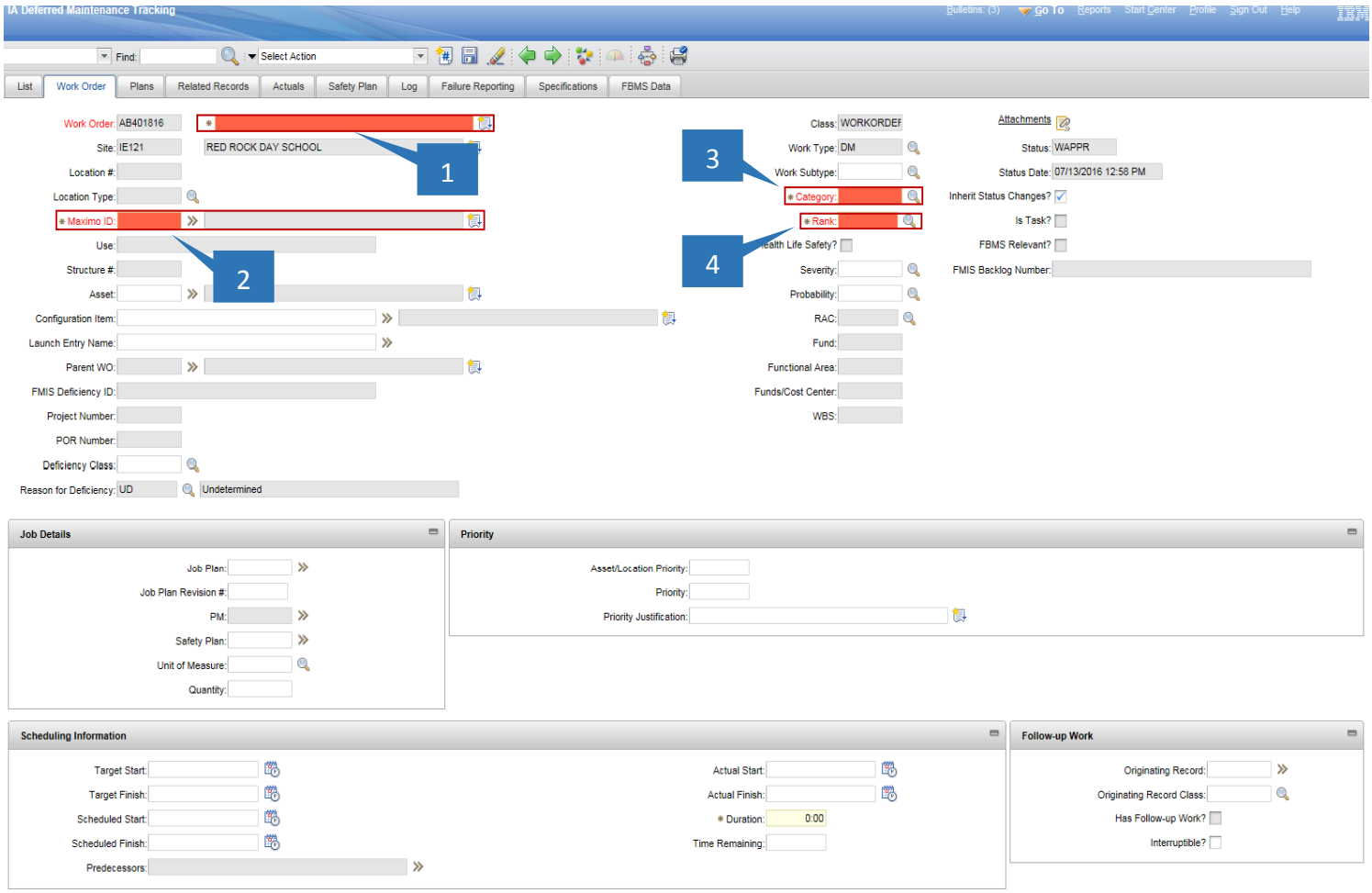
2) Click on the **New Work Order** icon located on the Toolbar.



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.



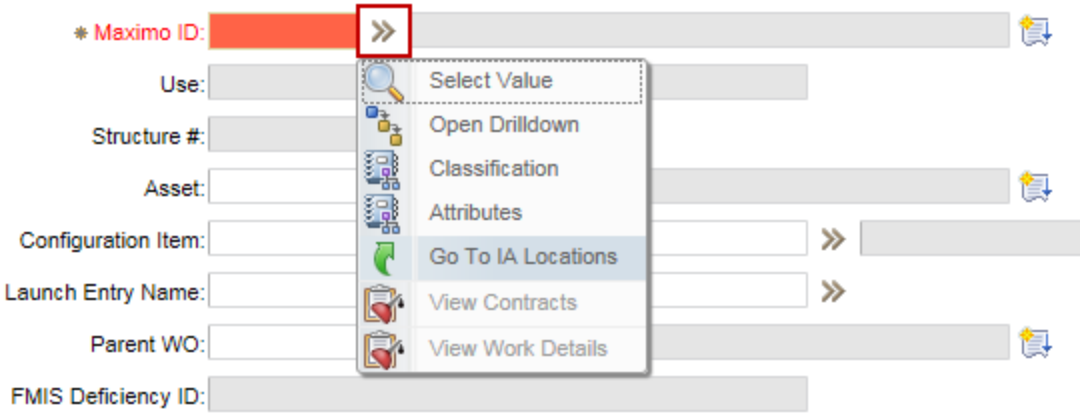
Required fields are indicated by a red (*) asterisk and red field shading. Examples of required fields in a work order are Work Order Description, Maximo ID (location where work needs to take place), Category and Rank.



1) 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.

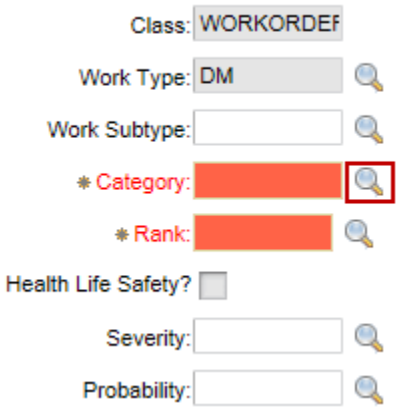
2) To enter or choose a Maximo ID (aka the location), select the Detail Menu icon (») next to the field.

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

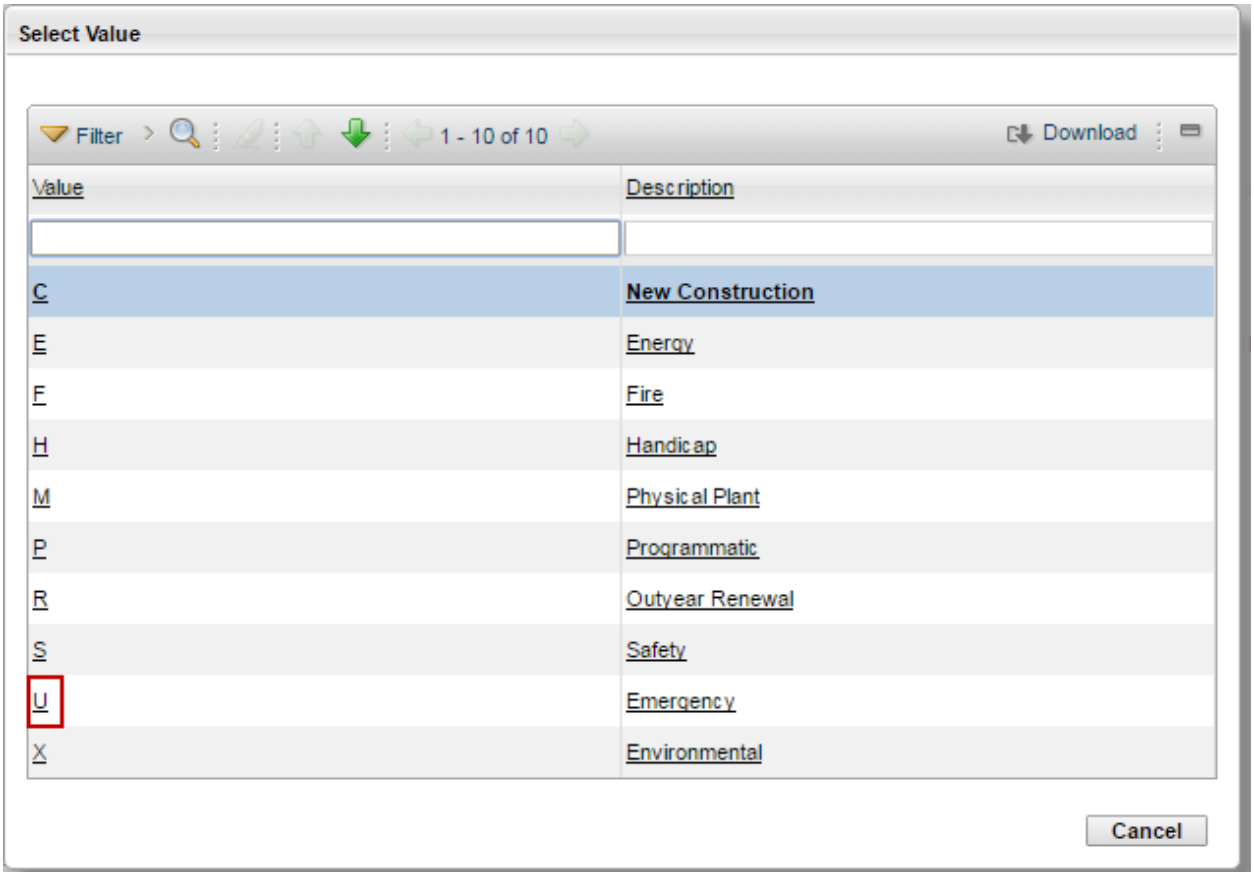


3) Select the Work Order **Category**.

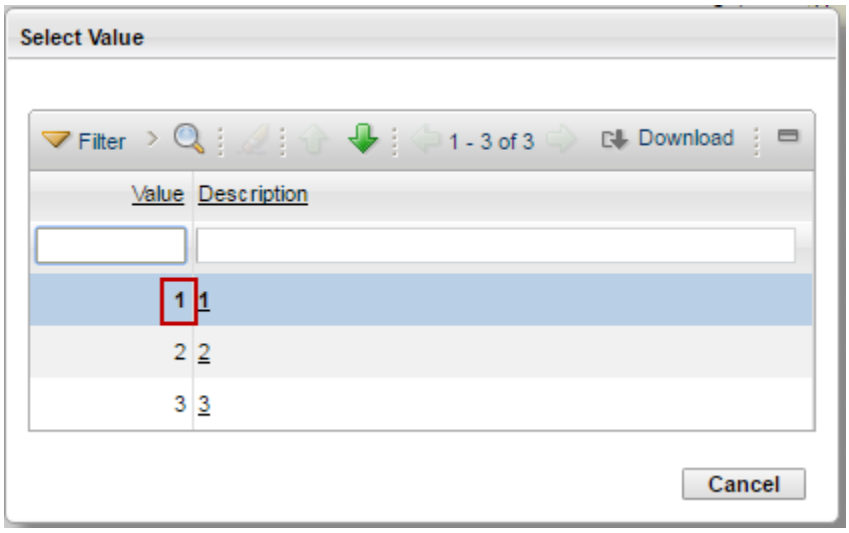
c) Within a work order, click on the Select Value icon to display the pop-up window with a list of available Categories.



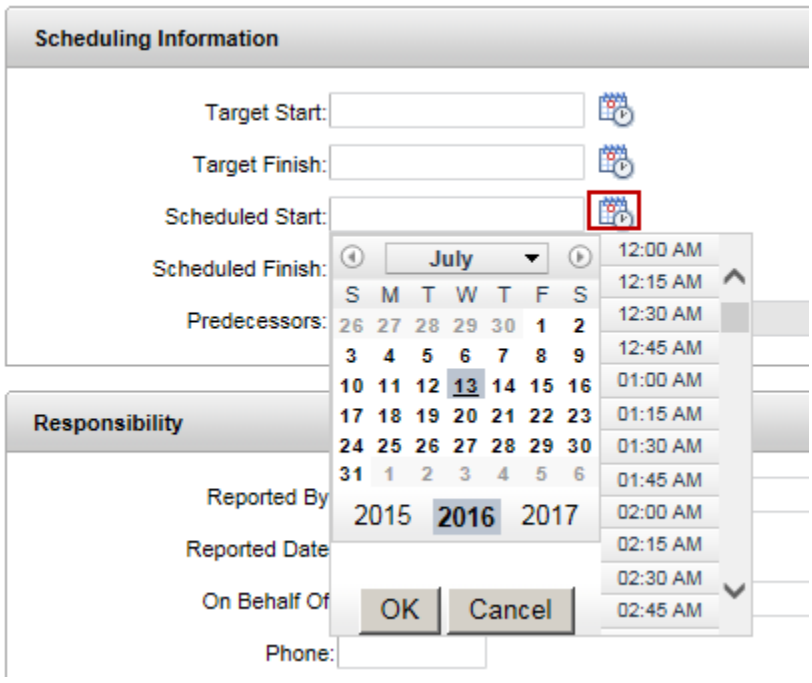
4) Select the **Work Order Category** – select **Emergency** which translates to **U**.



5) Select **Rank** – Rank for Emergency Work Orders should always be 1.



6) The **Scheduled Start** and **Scheduled Finish** dates are important for planning and reporting. Complete additional fields for greater planning and reporting options.



7) Click the **Save** icon .

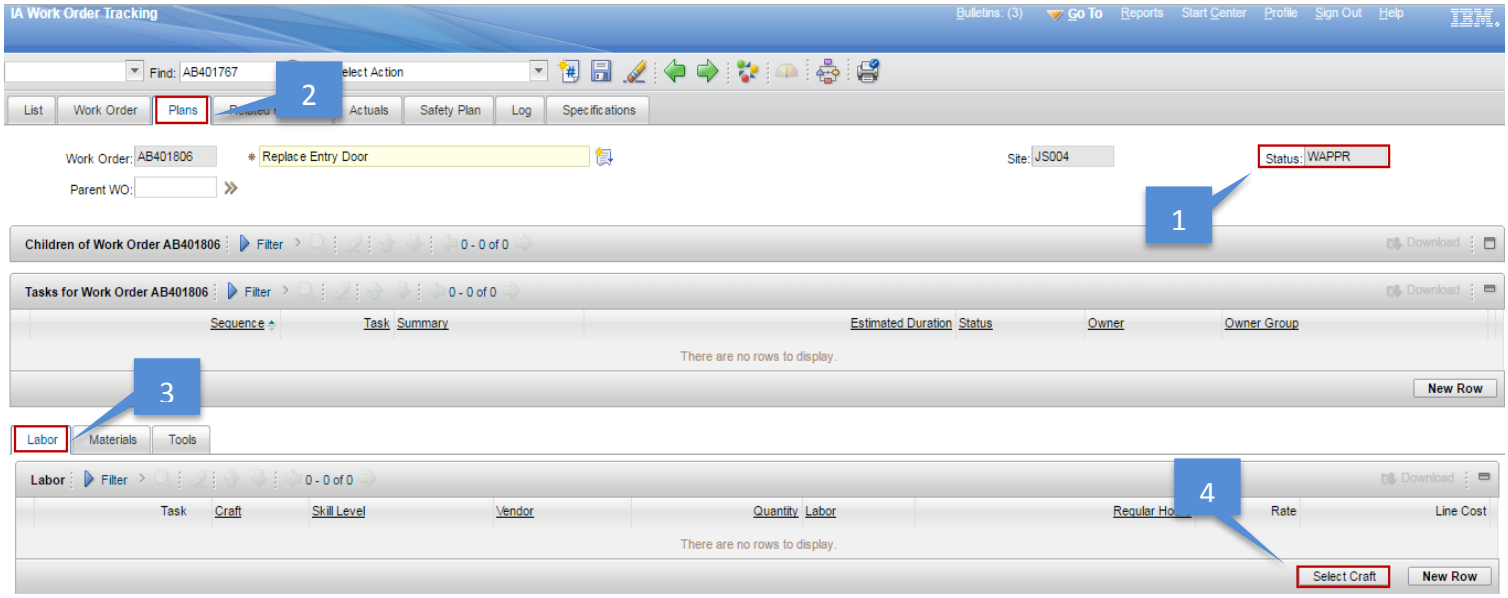
2.3 Planning Labor, and Material (Plans Tab)

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, labor, and materials.

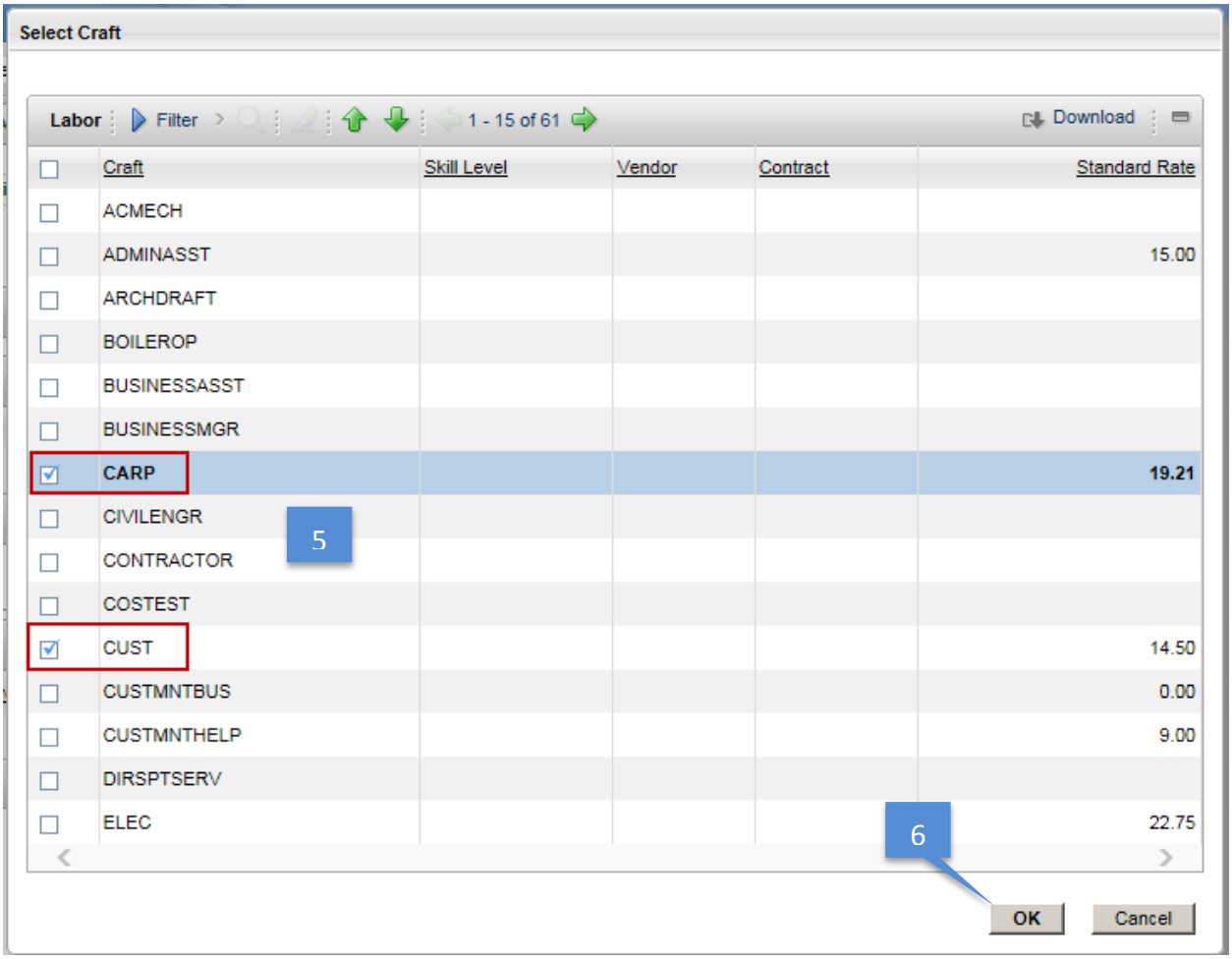
Note: Labor Planning in Maximo is done by Craft not by Person.

Adding Planned Labor

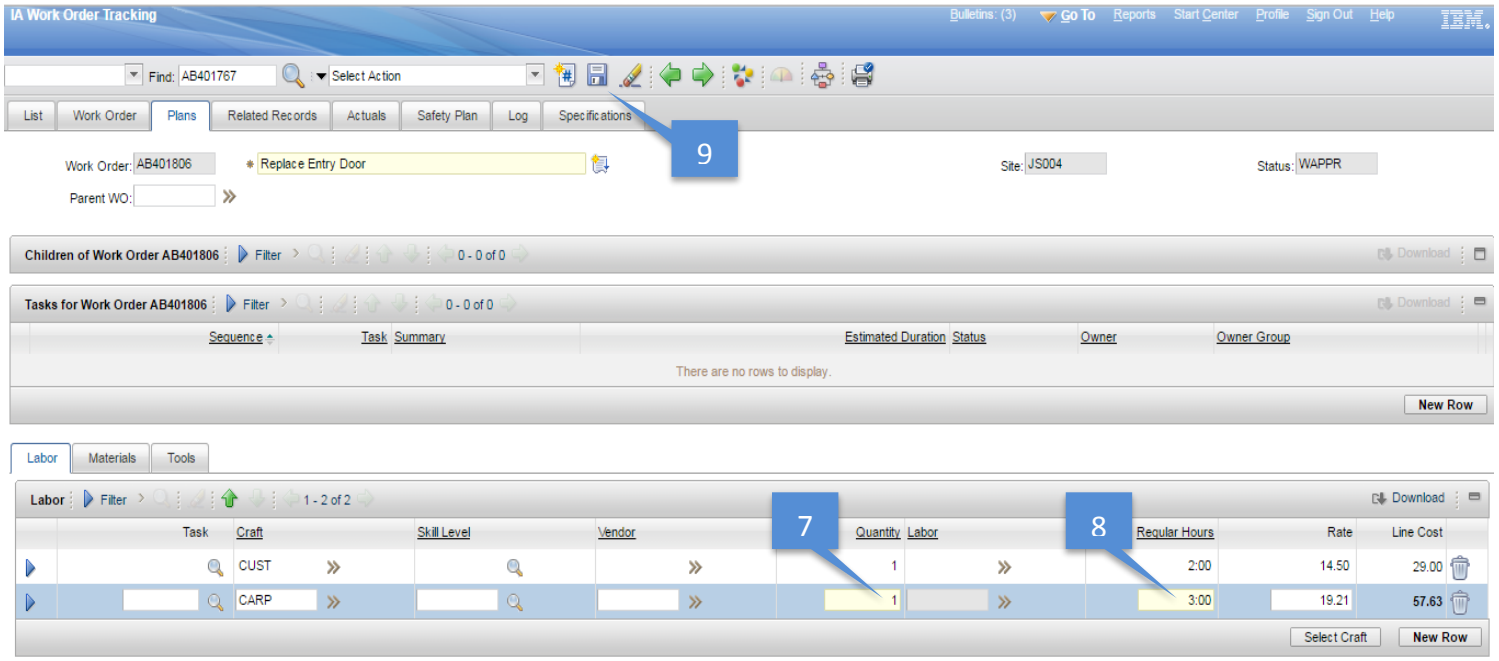
1) Find the work order to which you will be adding planned labor. Remember, the work order status **must be** WAPPR. Once a work order is approve (APPR), planned labor, material, or tools cannot be added.
2) Select the **Plans** tab.



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

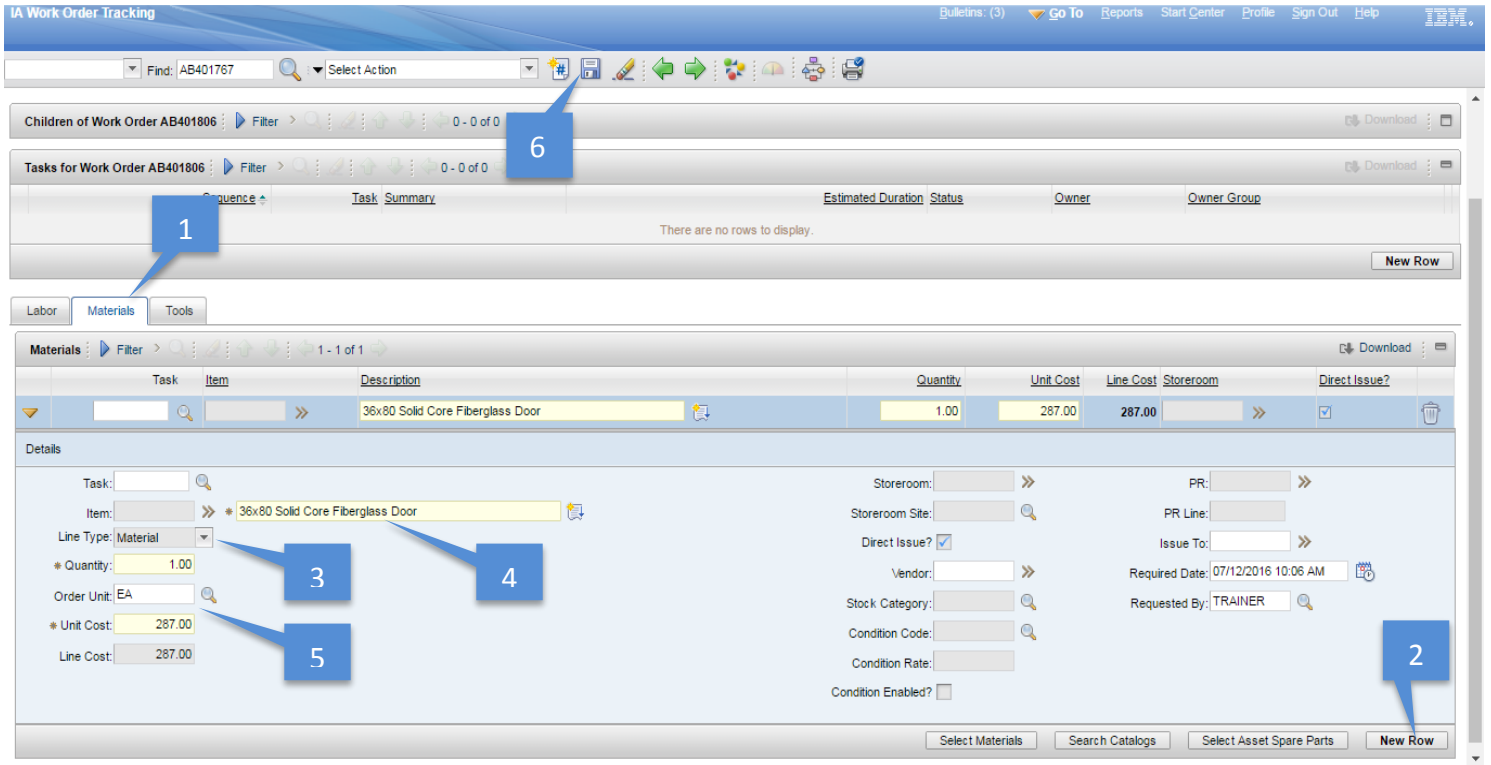


5) Check the box(s) to select the Craft(s) that are planned for this work order.
6) Click **OK**.



7) Enter the Craft Quantity.
8) Enter the Regular Hours.
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 on the **Save** icon  **.**

3 Exercise # 1 – Create a Non-Emergency DM Work Order

1. Navigate to the **IA Deferred Maintenance Tracking** application.
2. Click on the **New Work Order icon** located on the Toolbar.
3. Enter a brief **Description** (make the description whatever you want it to be) of the work to be accomplished in the field next to the work order number.
4. To enter or choose a Maximo ID (i.e. the Location), select the Detail Menu icon  next to the field.
5. Click on **Select Value.**
6. Select the location.
7. Select the **Work Order Category** (other than 'U', 'S', or 'H').
8. Select a **Rank** (see Appendix I: Category/Rank Combination Descriptions and Examples at the end of this tab for valid Category/Rank combinations).
9. Enter the **Scheduled Start** and **Scheduled Finish** dates and any additional fields for greater planning and reporting options
10. Click the **Save** icon.
11. Select the **Plans** tab.
12. Select the **Labor** sub-tab.
13. Click Select **Craft**.
14. Check the boxes to select the Crafts that are planned for this work order.
15. Click OK.
16. Enter the **Craft Quantity** (not required).
17. Enter the **Regular Hours** (not required).
18. Click **Save**.
19. Select the **Materials** sub-tab.
20. Select **New Row**.
21. Change the Line Type to "Material."
22. Enter a Description for the planned material.
23. Enter a **Quantity**.
24. Select the **Order Unit**.
25. Enter the **Unit Cost**.
26. Click **Save**.
27. Write down the work order number so that you can locate it in the BPERM application.

    Work Order Number _____
28. Submit the work order using the Workflow Process. Click on the Workflow icon  .

4 Exercise # 2 – Create an Emergency DM Work Order

1. Navigate to the **IA Deferred Maintenance Tracking** application.
2. Click on the **New Work Order icon** located on the Toolbar.
3. Enter a brief **Description** (make the description whatever you want it to be) of the work to be accomplished in the field next to the work order number.
4. To enter or choose a Maximo ID (i.e., the location), select the Detail Menu icon (») next to the field.
5. Click on **Select Value**.
6. Select the location.
7. Select the **Work Order Category**. For emergency DM Work Orders, the category is **U**.
8. Select **Rank** of 1.
9. Enter the **Scheduled Start** and **Scheduled Finish** dates and any additional fields for greater planning and reporting options
10. Click the **Save** icon.
11. Select the **Plans** tab.
12. Select the **Labor** sub-tab.
13. Click **Select Craft**.
14. Check the boxes to select the Crafts that are planned for this work order.
15. Click OK.
16. Enter the **Craft Quantity** (not required).
17. Enter the **Regular Hours** (not required).
18. Click **Save**.
19. Select the **Materials** sub-tab.
20. Select **New Row**.
21. Change the Line Type to "Material."
22. Enter a Description for the planned material.
23. Enter a **Quantity**.
24. Select the **Order Unit**.
25. Enter the **Unit Cost**.
26. Click **Save**.
27. Submit the work order using the Workflow Process. Click on the Workflow icon  .

5 Appendix I: Category/Rank Combination Descriptions and Examples

Cat/Rank	Severity	Description/Example
U-1	Emergency	An emergency is a condition where death, physical harm, or property damage can be foreseen and possibly eliminated. Examples: Roof caving in or destroyed by a storm. Heating system failed posing a threat to a building. **(Facility conditions must not be the cause of lack of maintenance.)**
S-1	Safety-Serious Deficiency	A Safety-Serious Deficiency poses a threat to safety and health, including violations of Occupational Safety and Health Standards, Life Safety Code, Uniform Building Code, among other codes and laws, as applicable. (Safety deficiencies can only be identified through safety inspectors in S&CAP) Examples: Required means of egress such as protected corridor and terminating after exit discharge. Fire enclosing hazardous areas. Fire rated doors, exit and emergency lighting. Means to alert occupants of danger-fire alarms, visual alarms, etc. Required sprinkler systems (i.e., janitor closets in schools).
S-2	Safety-Moderate Deficiency	Safety-Moderate Deficiencies affecting Safety and Health. (Safety deficiencies can only be identified through safety inspectors in S&CAP) Examples: Trip and fall hazards when not on stairways or ramps, exterior lighting when not involving exit discharges, steps, ramps. Lack of ventilation. Sprinkler systems desired to be added which are in excess of life safety code requirements and Bureau policy. Fume hoods in science laboratories.
H-1	Serious handicap code violations	Examples: Provide handicapped accessibility to building. Provide handicap accessible restrooms.
H-2	Violation of Federal Handicap Codes and Standards	Examples: Install code compliant handrails for handicapped restrooms or portions of restrooms that need to be modified for handicapped compliance.
M-1	Physical Plant, Non-Programmatic, Deficiency Condition	A Physical Plant, Non-Programmatic, Deficiency Condition (that renders a facility, facility system, or facility component inoperable). This is related to structural, mechanical, electrical, roofs, walls, floors, foundations, utilities, paving, etc. Examples: Roof deterioration causing interior building damage. Serious overload of electrical system due to modernization of equipment. Removal and replacement of refrigerant compressor on chiller. Replacement of defective sections on boiler, sewer, water or gas line deterioration.
M-2	Physical Plant, Non-Programmatic, Deficiency Condition	A Physical Plant, Non-Programmatic, Deficiency Condition (that if not attended to will render a facility, facility system, or facility component inoperable). This is related to structural, mechanical, electrical, roofs, walls, floors, foundations, utilities, paving, etc.

		Examples: Replace door locks that have worn to a point where they do not operate. Replace cracked sidewalks causing tripping hazard.
M-3	Functional facility equipment exceeds its normal life expectancy	Functional facility equipment exceeds its normal life expectancy. Example: Replace boiler. Replace steam kitchen equipment. Replace carpeting.
E-2	Violation of energy codes and standards	Examples: Installation of new energy efficient lighting fixtures. Replacement of single-glazed windows with double- or triple-glazed windows for energy efficiency. Upgrading or replacement of heating systems.
E-3	Deficiencies which when corrected will reduce energy consumption	Examples: Installation or replacement of automated night setback switches for heating systems. Replacement of weather seals on exterior doors throughout the building.
F-2	Deficiencies for Fire Support	Examples: Fire Stations, Fire training classes, etc.
X-1	A serious environment code deficiency	A serious environment code deficiency that poses a threat to life or property. Examples: Remove friable asbestos on piping in occupied areas. Remove leaking underground storage tanks.
X-2	Environment code deficiency	Examples: Remove asbestos floor tile from a building. Install code compliant leak detection system on tanks. Remove lead paint from quarters.
C-1	Construction to correct serious multiple code/safety deficiencies	Construction (new replacement or addition) to correct serious multiple code/safety deficiencies. Examples: Major renovations throughout a building or facility to abate numerous high cost code violations such as fire sprinklers, fire doors, etc.
C-2	Construction to correct code and/or standards violation	Construction (new replacement or addition) to correct code and/or standards violation. Examples: Major retrofit to a building or facility for handicap code compliance. Major replacement of HVAC systems for code compliance.
P-2	Programmatic Capital Improvements	Renovations and additions to existing buildings to change the functional space to accommodate programmatic space needs. Examples: Retrofit existing classroom use into computer lab. Remodel a classroom to comply with FACE program standards. Convert a dorm to classrooms. Convert science lab to general classroom. Building addition to dining room.