Indian Affairs, Division of Facilities Management and Construction

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

O&M Work Orders

Lesson goals

This lesson will cover the following specifics within IA-FMS:

- Accessing the Work Order application.
- Creating O&M Work Orders.
- Parent / Standing Work Orders.
- Attaching a Job Plan to a Work Order.
- Adding Planned Labor and Materials to a Work Order.
- 'Approving' (APPR) a Work Order.
- The Work Log tab.
- Reporting Time, Labor, and Materials.
- Updating 'Closed' Work Orders.
- Creating 'Follow Up' Work Orders.

IA-FMS Overview

IA-FMS - O&M Work Orders

Lesson

O&M Work Orders

Work Orders

- Work orders are the foundation on which the Total Cost of Ownership (TCO) is calculated.

    - Work Orders are initiated into Maximo from two sources:

        - IA Work Order Tracking application.

        - IA Deferred Maintenance Tracking application.

    - Work Orders within Maximo are used for planning work and resource needs, as well as tracking work performed on current and past events.

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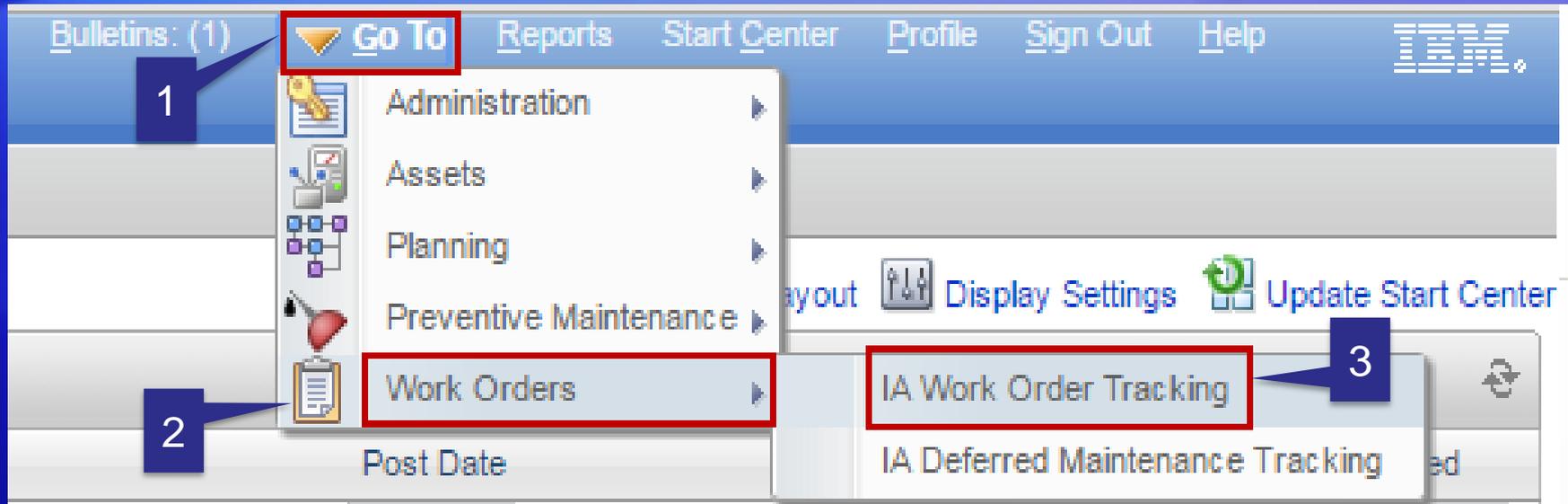
1. Select 'Go To'
2. Select 'Work Orders'
3. Select 'IA Work Order Tracking'

Searching the 'IA Work Order' Application

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

Work Order – Creating an O&M Work Order

1. Click on 'New Work Order' icon.
2. Work Order number will auto populate.
3. Enter Work Order 'Description'.
4. Enter 'Maximo ID' (i.e. Location).
5. Enter 'Parent WO' (if applicable).
6. Enter 'Work Type'.
7. 'Save' the record.

Parent / Standing Work Orders

- The link to the FBMS system and carry the correct FBMS line of accounting

- Work types:

  - RPFM – Real Property Facility Maintenance

  - RPFO – Real Property Facility Operations

- Pre-created and aligned with an equivalent Standing Order in FBMS

- Cannot be directly modified by users

- Associated with each location (6 per location)

- Child O&M Work Orders inherit the correct FBMS accounting string

Attaching a Job Plan a Work Order

Job Details

Job Plan: `_____` ≫ **1**

Job Plan Revision #: `_____`

PM: `_____` ≫

Safety Plan: `_____` ≫

Unit of Measure: `_____` **2** 🔍 Select Value

Quantity: `_____` ↩ Go To IA Job Plans

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

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

Select Value

3

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

Show Job Plans with No Classes Defined? ☑

WO Class: Work Order ▼

4 Refresh

▽ Filter > 🔍 | 🖊 ⬆ ⬇ | ⬅ 1 - 15 of 1054 ➡ · · · 📥 Download ▭

Job Plan	Description	Template Type	Organization	Site
`____` **5**	`_____`	`____`	`____`	`____`
1068	WEEKLY BOILER JOB PLAN	MAINTENANCE	OFMC	-
1069	MONTHLY BOILER JOB PLAN	MAINTENANCE	OFMC	-
1070	SEMI-ANNUAL BOILER JOB PLAN	MAINTENANCE	OFMC	-

Adding Planned Labor to a Work Order

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

Adding Planned Labor – Selecting a Craft

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

Adding Planned Materials

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

Changing the Status of a Work Order
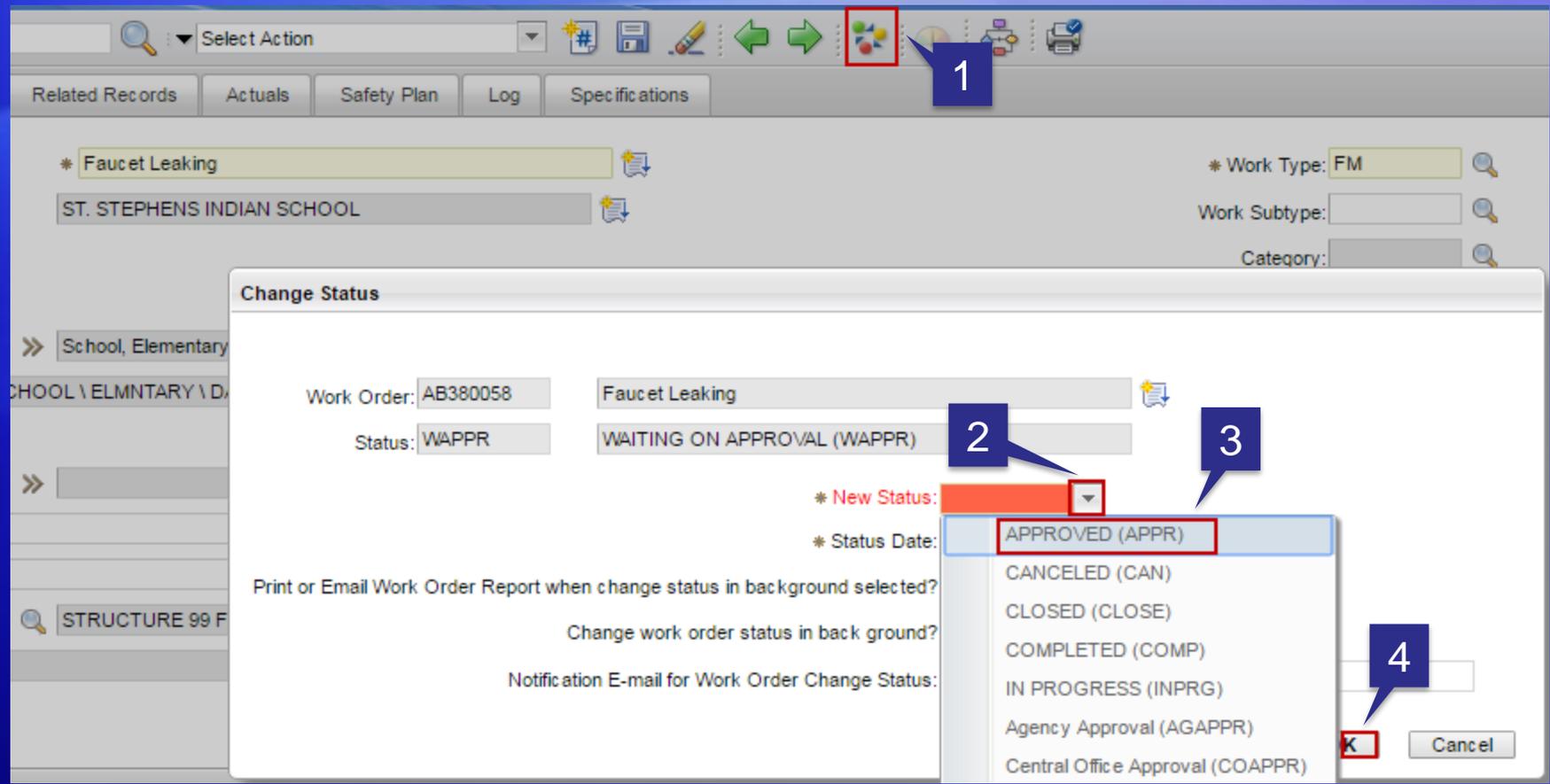
1. Click on the mulit-colored icon.
2. Select the down arrow for 'New Status'.
3. Select 'APPROVED (APPR)'.
4. Select 'OK' (Hidden behind the drop down menu).

The Work Log Tab

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

Reporting Time & Labor

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

IA-FMS - O&M Work Orders

Reporting Materials

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

Closing Work Orders
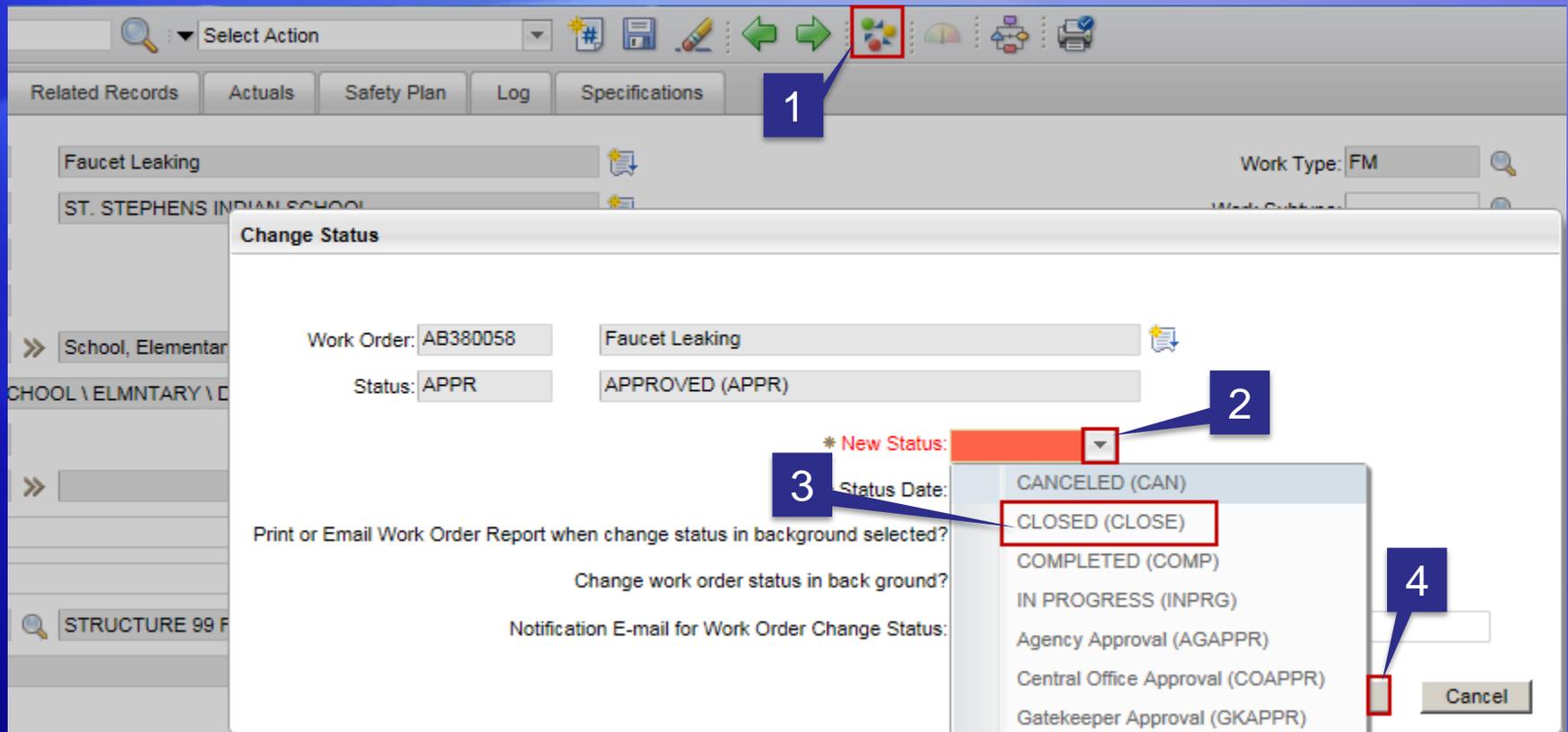
1. Click on the mulit-colored icon.
2. Select the down arrow for 'New Status'.
3. Select 'CLOSED (CLOSE)'.
4. Select 'OK'

Updating Closed Work Orders

1. Click on 'Advanced Search'.
2. Remove the 'N' value from this field.
3. Select the Status of 'CLOSE'.
4. Click on 'Find'.

Updating Closed Work Orders

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

Updating Closed Work Orders

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

Creating 'Follow Up' Work Orders

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

Demo

O&M Work Orders