

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.

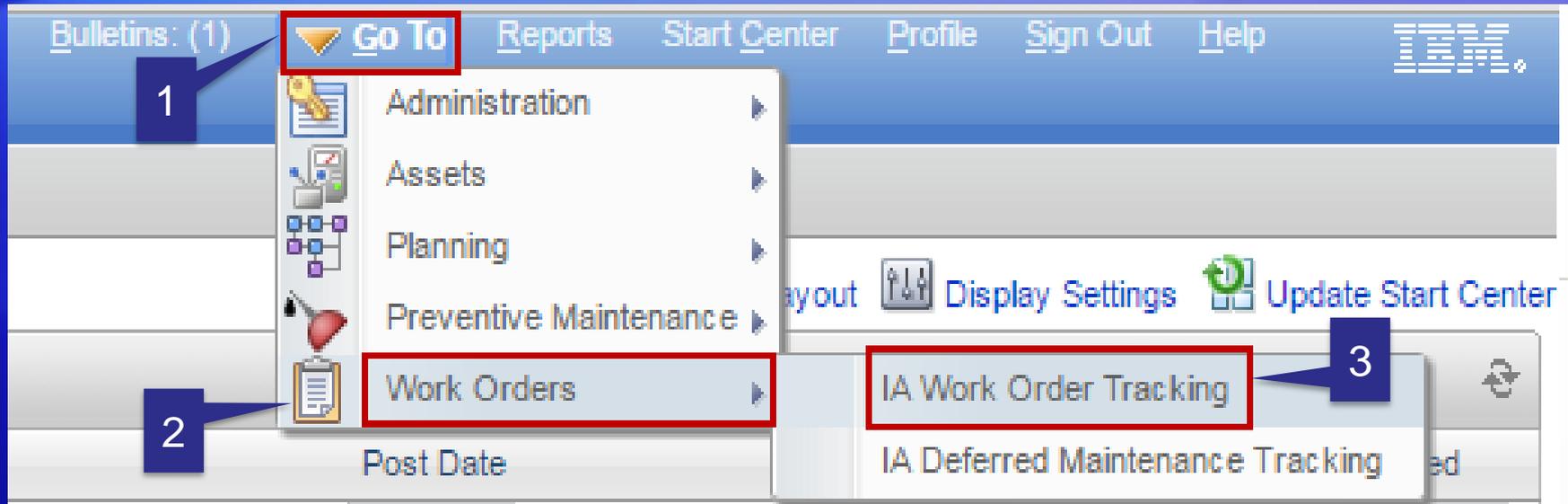
Lesson

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

The screenshot displays the 'IA Work Order Tracking' application interface. At the top, there is a navigation bar with links for 'Bulletins: (1)', 'Go To', 'Reports', 'Start Center', 'Profile', and 'Sign Out'. Below this is a toolbar with a 'Find:' search box, a 'Select Action' dropdown, and various icons for navigation and actions. A secondary toolbar contains buttons for 'List', 'Work Order', 'Plans', 'Related Records', 'Actuals', 'Safety Plan', 'Log', and 'Specifications'. Further down, there are buttons for 'Advanced Search', 'Save Query', and 'Bookmarks'. The main section is titled 'Work Orders' and features a 'Filter' button and a '0 - 0 of 0' status indicator. Below this, a row of search filter fields is shown, each with a red border: 'Work Order', 'Description', 'Structure #', 'Room #', 'Maximo ID', 'Location Type', 'Work Type', 'Status', and 'FMIS Work Ticket'. Each field has a search icon to its right. Below the filter fields, a small text box provides instructions: 'To find records, use the filter fields and then press Enter. For more search options, use the Advanced Search button. To enter a new record, select the Insert icon in the toolbar.'

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

The screenshot displays the 'IA Work Order Tracking' application interface. At the top, there is a navigation bar with 'Bulletins: (1)', 'Go To', and 'Reports'. Below this is a search bar with 'Find:' and a 'Select Action' dropdown. A toolbar contains various icons, including a 'New Work Order' icon (1). The main form is divided into several sections: 'Work Order' (2) with fields for 'Work Order' (AB380058) and 'Site' (IE150); 'Description' (3) with a large text area; 'Location' (4) with 'Maximo ID' and 'Location #' fields; 'Parent WO' (5) with a 'Parent WO' field; and 'Work Type' (6) with a 'Work Type' dropdown. The 'Work Order' field is auto-populated with 'AB380058'. The 'Site' field is 'IE150'. The 'Location #' field is empty. The 'Maximo ID' field is empty. The 'Parent WO' field is empty. The 'Work Type' dropdown is set to 'O&M'. The 'Work Order' field is highlighted in orange. The 'Work Type' dropdown is also highlighted in orange. The 'New Work Order' icon is highlighted in blue. The 'Parent WO' field is highlighted in blue. The 'Work Type' dropdown is highlighted in blue. The 'Work Order' field is highlighted in blue. The 'Site' field is highlighted in blue. The 'Location #' field is highlighted in blue. The 'Maximo ID' field is highlighted in blue. The 'Parent WO' field is highlighted in blue. The 'Work Type' dropdown is highlighted in blue. The 'Work Order' field is highlighted in blue. The 'Site' field is highlighted in blue. The 'Location #' field is highlighted in blue. The 'Maximo ID' field is highlighted in blue. The 'Parent WO' field is highlighted in blue. The 'Work Type' dropdown is highlighted in blue.

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

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

The screenshot displays the IA Work Order Tracking application interface. At the top, there is a navigation bar with 'IA Work Order Tracking' on the left and 'Bulletins: (1)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help' on the right. Below this is a toolbar with various icons. The main content area has a 'Plans' tab selected, with other tabs like 'List', 'Work Order', 'Related Records', 'Actuals', 'Safety Plan', 'Log', and 'Specifications'. A callout '1' points to the 'Plans' tab. The work order details show 'Work Order: AB187082' with a description '* empty garbage, vacume and emty recycle bins mop floor. was' and 'Status: WAPPR'. A callout '2' points to the 'Status: WAPPR' field. Below this are sections for 'Children of Work Order AB187082' and 'Tasks for Work Order AB187082'. The 'Labor' section is active, showing a table with columns for Task, Craft, Skill Level, Vendor, Quantity, Labor, Regular Hours, Rate, and Line Cost. A callout '4' points to the 'Craft' field in the table. Below the table is a 'Details' section with fields for Task, Craft, Skill Level, Vendor, Labor Contract, Quantity, Labor, Regular Hours, Rate, Line Cost, and Rate Changed?. A callout '3' points to the 'New Row' button at the bottom right. A callout '4' also points to a 'Select Value' button in the 'Craft' field details.

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

Work Order Tracking

Bulletins: (1) Go To Reports Start Center Profile Sign Out Help

BMXAA4205I - Record has been saved.

Find: [] Select Action []

List Work Order Plans Related Records Actuals Safety Plan Log Specifications

Work Order: AB187082 * empty garbage, vacume and emty recycle bins mop floor. was Site: IE087 Status: WAPPR

Parent WO: []

Children of Work Order AB187082 Filter [] 0 - 0 of 0 Download

Tasks for Work Order AB187082 Filter [] 0 - 0 of 0 Download

Labor Materials Tools

Labor Filter [] 1 - 2 of 2 Download

Task	Craft	Skill Level	Vendor	Quantity	Labor	Regular Hours	Rate	Line Cost
ACMECH				1		2:00	21.00	42.00
	CARP			1		3:00	19.21	57.63

Select Craft New Row

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

IA Work Order Tracking

Bulletins: (1) 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: AB187082 empty garbage, vacume and emty recycle bins mop floor. was Site: IE087 Status: WAPPR

Parent WO: >>

Children of Work Order AB187082 Filter 0 - 0 of 0

Tasks for Work Order AB187082 Filter 0 - 0 of 0

Labor Materials Tools

Materials Filter 1 - 1 of 1

Task	Item	Description
		Trash Bags

Task: Item: * Trash Bags

* Line Type: Material

* Quantity: 1.00

Order Unit:

* Unit Cost: 0.00

Line Cost: 0.00

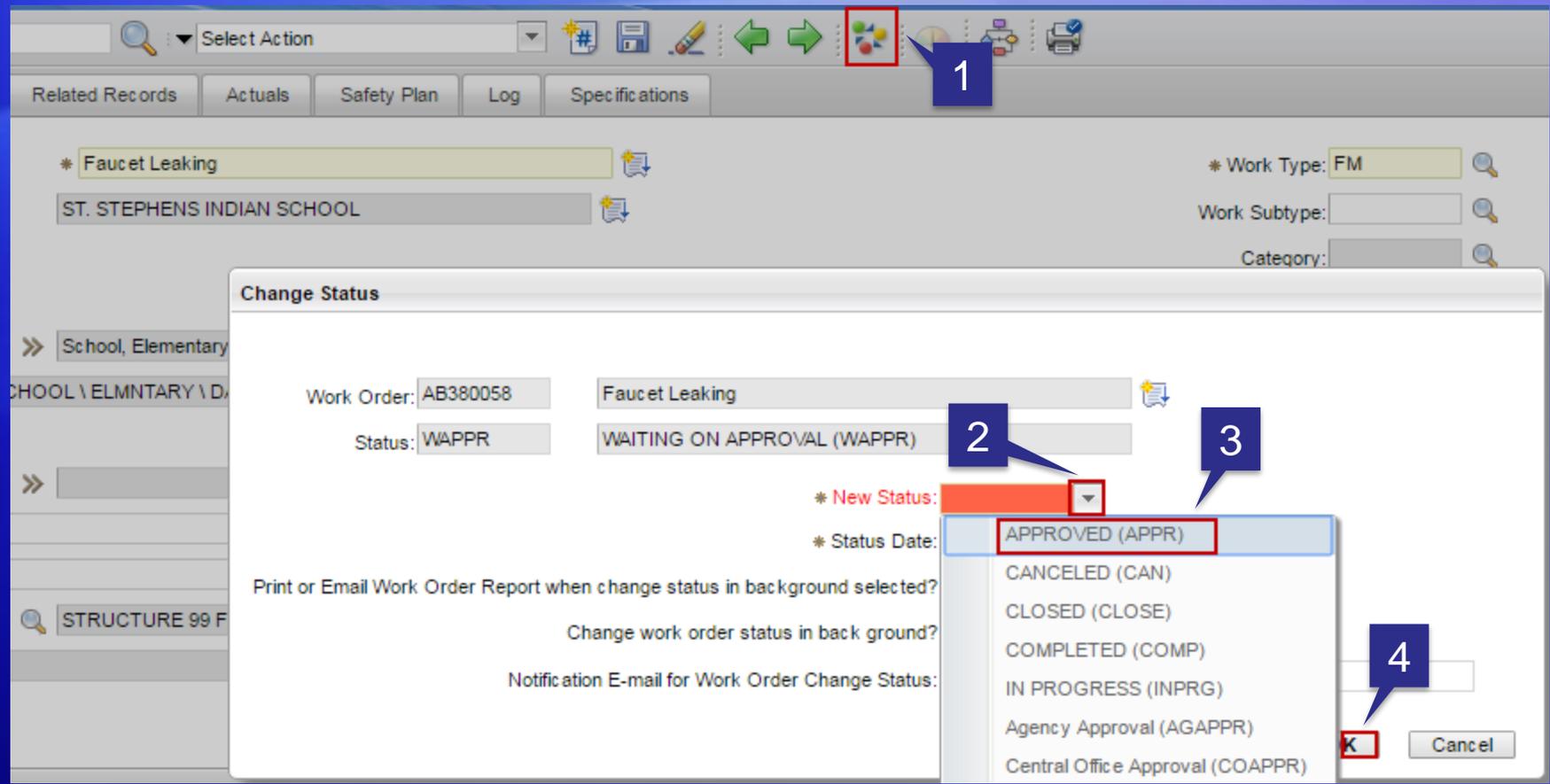
Vendor: Stock Category: Condition Code: Condition Rate: Condition Enabled?

Required Date: 06/01/2016 1:43 PM Requested By: KMERRILL

Select Materials Search Catalogs Select Asset Spare Parts **New Row**

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 multi-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

IA Work Order Tracking

Bulletins: (1) Go To Reports Start Center Profile Sign Out Help

Find: Select Action

List Work Order Plans Related Records Log Specifications

Work Order: AB187082 * empty garbage, vacume and emty recycle bins mop floor. was Site: IE087 Status: WAPPR

Work Log Communication Log

Work Logs Filter 1 - 1 of 1 Download

Record	Class	Created By	Date	Type	Summary	Viewable?
AB187082	WORKORDEF	KMERRILL	06/01/2016 2:05 PM	CLIENTNOTE		<input type="checkbox"/>

Details

Record: AB187082

Class: WORKORDEF

Created By: KMERRILL

Date: 06/01/2016 2:05 PM

* Type: CLIENTNOTE

Viewable?

Summary: [Text Box]

Details: [Text Box]

Font Size Format None

New Row

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

The screenshot displays the 'Actuals' tab of the 'IA Work Order Tracking' application. The interface includes a top navigation bar with tabs for 'List', 'Work Order', 'Plans', 'Related Records', 'Actuals', 'Safety Plan', 'Log', and 'Specifications'. Below this, there are input fields for 'Work Order: AB187082' and 'Parent WO:'. A callout '1' points to the 'Actuals' tab. To the right, a 'Status: APPR' field is highlighted with a red box and callout '2'. Below the status, there are sections for 'Children of Work Order AB187082' and 'Tasks for Work Order AB187082'. The 'Labor' section is active, showing a table with columns for 'Task', 'Labor', and 'Name'. A callout '4' points to the 'Labor' dropdown menu where 'BBYRE' is selected. Below the table, there are fields for 'Task', 'Start Date', 'Start Time', 'End Time', 'Timer Status', 'Regular Hours' (with a value of 2:00 and callout '5'), and 'Rate' (with a value of 0.00). The 'Details' section includes 'Craft: CONTRACTO' and 'Skill Level'. The 'Outside Labor' section has fields for 'Outside?', 'Vendor', 'Contract', and 'Revision'. The 'Premium Pay' section has fields for 'Premium Pay Code', 'Premium Pay Hours', 'Premium Pay Rate', and 'Premium Rate Type'. The 'Charge Information' section has fields for 'GL Debit Account', 'GL Credit Account', 'Location', 'Asset', and 'Memo'. A 'Recorded as Received' field is at the bottom. At the very bottom, there are buttons for 'Select Labor', 'Select Planned Labor', and 'New Row', with the 'New Row' button highlighted by callout '3'.

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.

Reporting Materials

Work Order: AB187082 empty garbage, vacume and emty recycle bins mop floor. was Site: IE087 Status: APPR

Children of Work Order AB187082 Filter 0 - 0 of 0 Download

Tasks for Work Order AB187082 Filter 0 - 0 of 0 Download

Labor **Materials** Tools

Task	Item	Description
		Cinder Blocks

Details

Task: Item: Cinder Blocks

* Line Type: Material

Storerroom: Site: IE087

Quantity: 200.00

* Unit Cost: 1.79

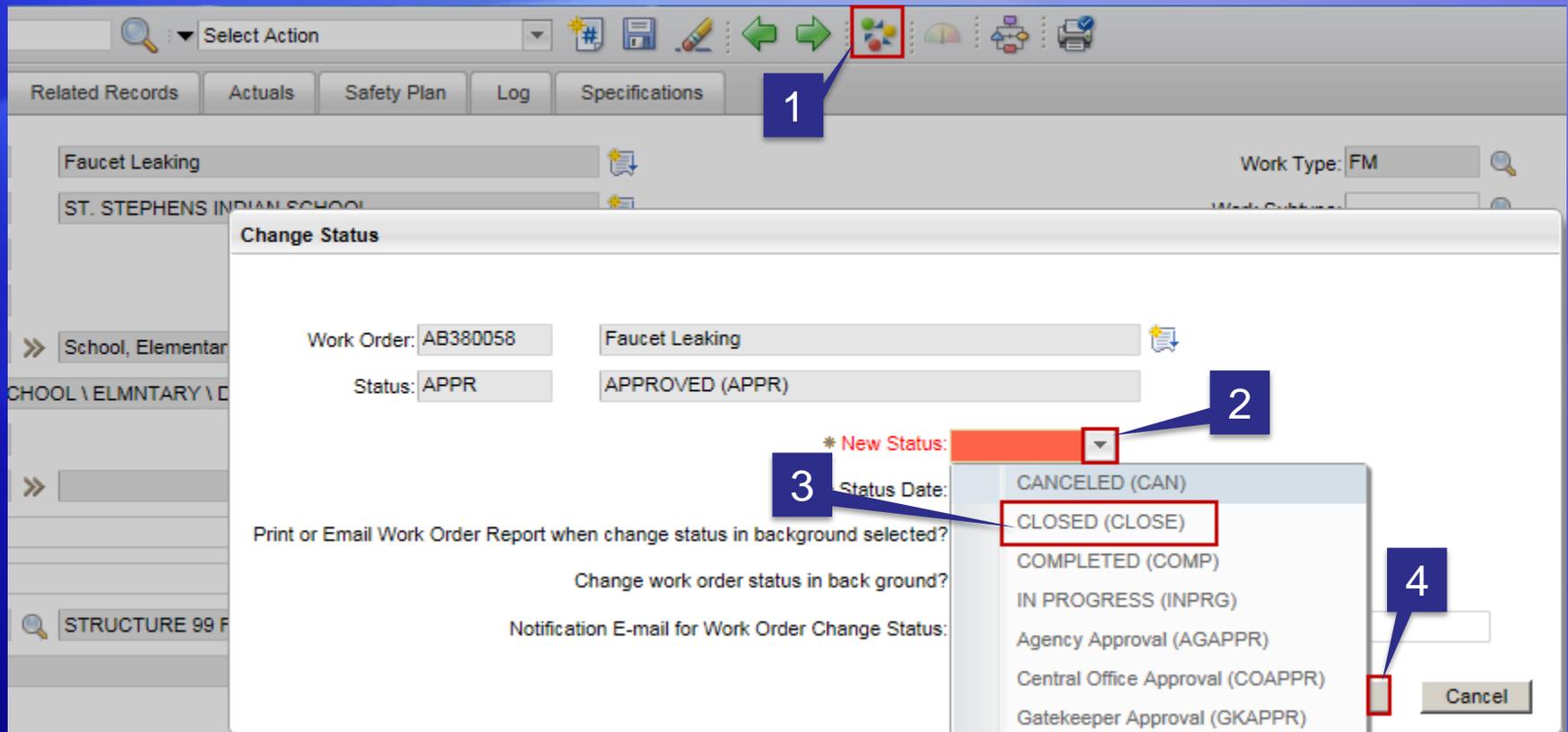
Line Cost: 358.00

Bin: Requisition: Requisition Line: Location: AB215972 Classroom, General Asset: Rotating Asset: GL Debit Account: GL Credit Account: * Transaction Type: ISSUE Outside? Issued To:

Select Materials Select Reserved Items Select Asset Spare Parts **New Row**

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 multi-colored icon.

2. Select the down arrow for 'New Status'.

3. Select 'CLOSED (CLOSE)'.

4. Select 'OK'

Updating Closed Work Orders

IA Work Order Tracking

More Search Fields | Current Query:

Work Order:

Description:

Parent WO: >>

Maximo ID: >>

Search Location Hierarchy: >>

Structure #:

Room #:

Location #:

Location Type: 🔍

Asset: >>

Configuration Item:

PM: >>

FMIS Deficiency ID:

Problem Code: 🔍

Failure Class: >>

Service Group: >>

Service: 🔍

Vendor: >>

Originating Record: >>

Originating Record Class: 🔍

Risk Assessment:

FMIS Work Ticket:

Work Type: 🔍

Status: =CLOSE 🔍

Class: =WORKORDE 🔍

Site: =JS004 🔍

History? 🔍

Priority:

Task? N 🔍

Category: 🔍

Rank: 🔍

RAC: 🔍

Fund:

onal Area:

st Center:

WBS:

Plan Details

Job Plan: >> Plan Craft: >>

Safety Plan: >> Plan Materials: >>

Assigned Labor: >> Plan Services: >>

Reported By: >> Lead: >>

On Behalf Of: >> Owner: >>

Supervisor: >> Owner Group: >>

Find Restore Application Defaults Revise Cancel

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

The screenshot displays the 'Job Details' section of the IA-FMS O&M Work Orders interface. The 'Select Action' dropdown menu is open, showing a list of actions. A red box highlights the 'down arrow' next to the 'Select Action' field, and a blue callout with the number '1' points to it. Another red box highlights the 'Edit History Work Order' option in the dropdown menu, and a blue callout with the number '2' points to it. The background shows the 'Work Order' tab with fields for Work Order ID (AB207484), Site (IE150), Location # (C58-10), Location Type (1100), Maximo ID (AB101287), Use (BUILDING \ SCHOOL \ ELMNTAR), Structure # (99), and FMIS Deficiency ID (6649685).

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

Updating Closed Work Orders

IA Work Order Tracking

Bulletins: (3) Go To Reports Start_Center Profile Sign Out Help IBM

Find: Select Action

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

3

Work Order: AB207484 * Deficiency Sequence - 1 REPLACE WATER COOLER, WAL

Site: IE150 ST. STEPHENS INDIAN SCHOOL

Location #: C58-10

Location Type: 1100

Maximo ID: AB101287 >> School, Elementary, Day

Use: BUILDING \ SCHOOL \ ELMNTARY \ DAY

Structure #: 99

Asset: >>

Configuration Item: >>

Launch Entry Name: >>

Parent WO: >>

FMIS Deficiency ID: 6649685

2

* Work Type: FM

Work Subtype:

Category:

Rank:

Health Life Safety?

Severity:

Probability:

RAC:

FMIS Work Ticket: 2

Fund:

Functional Area:

Funds/Cost Center:

WBS:

1

Attachments

Status: CLOSE

Status Date: 06/08/2016 8:44 AM

Inherit Status Changes?

Is Task?

FBMS Relevant?

FBMS Status: NONE

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

The screenshot displays the 'IA Work Order Tracking' application. The 'Select Action' dropdown menu is open, showing options such as 'Change Status', 'Apply SLAs', 'View SLAs', 'Select/Deselect SLAs', 'Create', 'View', 'Create Job Plan from Work Plan', 'Remove Work Plan', 'Select Safety Hazards', 'Remove Safety Plan', 'Apply Route', and 'Enter Meter Readings'. The 'Create' option is highlighted with a red box, and the 'Work Order' option in the subsequent submenu is also highlighted with a red box. Three numbered callouts (1, 2, and 3) indicate the steps: 1 points to the dropdown arrow, 2 points to the 'Create' option, and 3 points to the 'Work Order' option. The background shows a form with fields for Work Order ID (AB210623), Site (IE150), Location # (C58-10), Location Type (1100), Maximo ID (AB101287), Use (BUILDING \ SCHOOL \ ELMNTARY), Structure # (99), Asset, Configuration Item, Launch Entry Name, Parent WO, and FMIS Deficiency ID (6656704).

1. Click on 'down arrow' next to the 'Select Action' field.

2. Select 'Create'.

3. Select 'Work Order'.

Demo

O&M Work Orders