MAXIMO WORK MANAGEMENT

Abstract

This training manual his manual covers overviews, processes and specific exercise associated with Work Management, Locations, Assets, Job Plans and◻ Preventive Maintenance.

Prepared by:

Nexus Data
Data Management Services

[Publish Date]

Maximo Work Management

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1 Maximo Overview of Work Orders and Workflow

1.1 UD MAXIMO WORK ORDERS

Work Orders are used to identify, plan, schedule, execute and track the work that is performed at Locations and/or on Assets and systems throughout the campus. Initially, a work order is a request for work to be performed. Once completed, a work order is a record of activities performed that make up the history of our Locations, Assets and systems. The information that is contained on a work order includes the following:

- The tasks that were performed
- The labor hours involved in performing the work
- The services used, if any
- The materials used, if any
- The tools required to do the work
- The assets worked on
- The locations where the work was performed

When you create a work order, you initiate the work management process and create a historical record of the work requested and performed. The work management process at UD is controlled by an electronic workflow process. This workflow, based on work types, ensures the right steps are performed, by the right people, in the right order and at the right time. At certain times in the workflow, direct assignments will determine who is to take action on a record. At other times, information on the work order including status, responsible group/individual, and assignment status will determine who is to take action. At all times, any status changes to be performed on a work order record will be done using workflow options.

As a work order record is processed through the work management workflow, more sections of the work order record will be populated with the information about what was both planned to be done and what was actually done. In this section of the training manual you will learn about the basic components of Work Order and Job records, the different Work Types, and the workflow processes for each Work Type.

1.2 UD Work Types

Work Types are assigned to Work Orders to categorize them by the nature of the work being performed. Ultimately, this serves two very important purposes:

- Categorization of Work
- Processing of Work

Categorization is the concept that it allows you to sort the work already performed or still in progress to determine how your facilities are performing. For example, is most of the work you are doing trouble or breakdown work or is most of it preventive maintenance. An organization that is trying to establish an Enterprise Asset Management (EAM) program and not just a repair service considers this type of information.

Processing of work is the concept that different types of work require different pre-, post-, and in progress processing tasks. For example, a corrective maintenance work order to repair a failure requires planning to analyze the failure and identify a fix. Whereas, a preventive maintenance work order already has a plan defined for it and does not need any planning prior to execution. In order to ensure that the right steps are done by the right people at the right time, we must have processes that dictate what those steps are based on work type.

Along with the UD implementation, the following work types will be used for UD work orders:

Work Type	Description
ADM	Administrative
CAPP	Capital Project >=$100,000
CM	Corrective Maintenance less than $1,000
ES	Event Support
NCAP	Non-Capital Project < $100,000
PM	Preventive Maintenance
RFS	Request for Service
SC	Service Call
STO	Stake-out
SWON	Standing WO Non-Routine
SWOR	Standing WO Routine

2 Work Order Workflow Process for On-Demand Work (SC, CM, ES and STO)

On-demand work (SC, CM, ES and STO) is typically initiated based on a customer request, tradesperson problem report, or as a follow up work order. For this reason, these work orders must be triaged and, in some cases, planned before they are assigned and executed.

1. Problem Reporting and Classification	2. Planning, Scheduling and Execution	3. Review and Closure
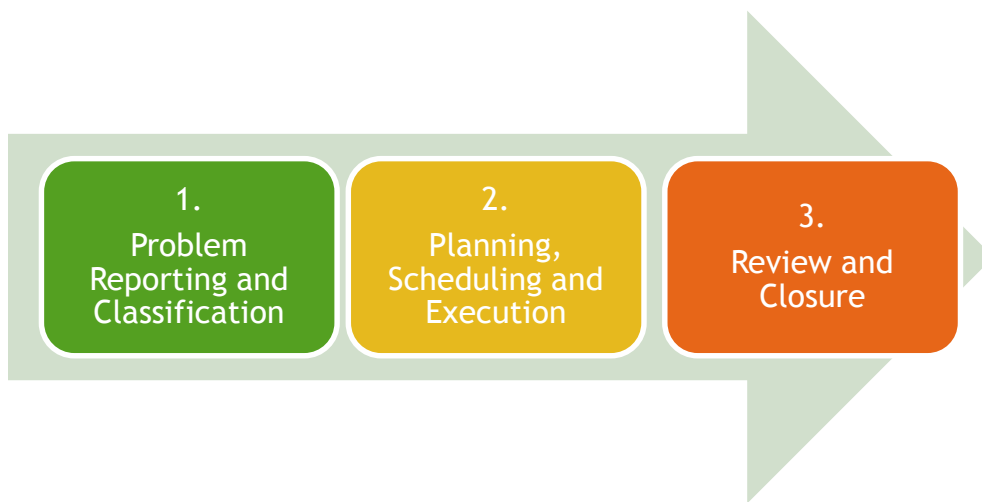
2.1 Phase 1 – Problem Reporting

During Phase 1 – Problem Reporting and Classification, begins at the dispatch center for all external customer request. At this point the dispatch center takes information from the initial requests and generates a Maximo service request. The work type determines the follow-on workflow. Service Calls are used for trouble shoot and repair work orders, simple work, or work that does not require time or materials to be charged against them. Work orders are used for more complex work that time and materials are charged against.

When the call center receives a Service Call they first enter the specific information related to the request.
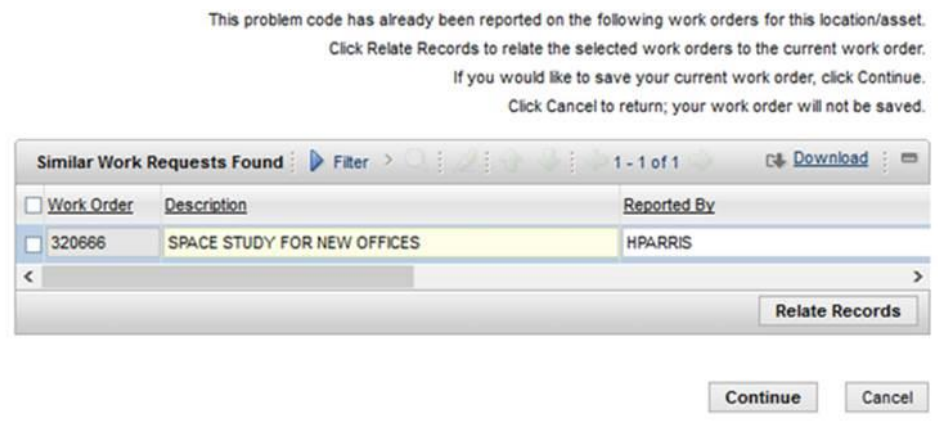
Dispatch records the following information:

- Location — Click Detail to access the Equipment / Location Drilldown and select the Location of the problem.
- Equipment/Asset — Click Detail to access the Equipment / Location drilldown and select an equipment.
- Description – Provide a short description of the problem
- Long Description – Details of the problem to include any pertinent information that may be required to locate and/or resolve the problem
- Work Type – Click select Value for options of work type as per the above table
- Failure class and Problem Code – Failure class may already be populated, if not Click Details for Failure Class Options. After the failure class has been assigned the Problem Code field will allow entry. Click on Details and choose the appropriate problem code.
- Customer Information – Enter the appropriate customer contact information
- Lead – Click Details to identify the lead
- Priority – Enter the Priority
  - **Priority 1**—priority 1 work takes priority over everything else. These are the work requests and service requests that must be completed within a quick time frame (3 days) to sustain services to UD personnel and students. Note: all emergency work orders/service requests are always priority 1.
  - **Priority 2**—work that must be completed in a short time frame and is needed to maintain adequate living conditions or to sustain university operations. Priority 2 work orders can be scheduled.
  - **Priority 3**—work that does not impact day to day operations of the university. Work that can be planned or scheduled and does not have the need to be completed within a predetermined time frame.
  - **Priority 4**—work that should be done, but budget or other obstacles exist that must be addressed prior to work starting. (Dispatch would not typically code Priority 4 as that would be the Work Group Manager's decision.)

- **Priority assignment—**if the work requires the call center to dispatch a technician to correct the problem, the call center assigns a priority code 1 form emergency or priority 2 for Urgent work.
- **Duplicate work orders** - When dispatch save the record, Maximo will verify there are no other duplicate records in system based on the Location and/or Asset, Failure Code and Problem Code. To determine a duplicate all of these fields must be filled out before the record is saved for the first time. If a duplicate exist the following pop-up window will prompt the user for additional action:

This problem code has already been reported on the following work orders for this location/asset.
Click Relate Records to relate the selected work orders to the current work order.
If you would like to save your current work order, click Continue.
Click Cancel to return; your work order will not be saved.

Similar Work Requests Found ▶ Filter >		1 - 1 of 1	⬇ Download
☐ Work Order	Description		Reported By
☐ 320666	SPACE STUDY FOR NEW OFFICES		HPARRIS

Relate Records

Continue   Cancel

- Once prompted, dispatch has the following options:
  - Relate the record to the duplicate work order
  - Cancel the work order
  - Continue with the work order

Once the record is saved it will go into workflow. Priority will determine the next steps of the workflow.

- Priority 1 and 2 service requests go to a status of 'DISP' (Dispatched). The work order will then show up in the Owner-groups in-box.
- Priority 3 and 4 service request creates a work order and the service request status is changed to 'APPR'. The work order will show up in the Owner-groups in-box for planning.

2.2 Phase 2 – Planning

2.2.1 Priority 1 and 2 "Dispatched" work

Dispatched work is already assigned and execution has begun before the Work Order is routed. Dispatched work does not require planning. All priority 1 and 2 work orders will be

routed to the Lead identified on the Service Call with a status of 'Dispatch'. The lead will then route the work order to the next steps:

Option	What Happens	Dependencies
Complete	Work order status goes to 'CCOMP' status routes to Work Group Manager's inbox for review.	Following entries should be completed before routing: • Labor Time • Materials • Work Log Updates
Follow-up	Work order status goes to 'CCOMP' status with 'Follow-up Work Order' in the description. A new Follow-up work order is generated and routed to the Work Group Manager's Inbox status 'APPR'	Following entries should be completed before routing: • Labor Time • Materials • Work Log Updates

All follow-up work orders will resume under the Priority 3 and 4 workflow process. Completed work will be routed as section 2.2.2

2.2.2 Priority 3 and 4

Priority 3 and 4 work will show up in the assigned Work Group Manager's in-box assignments in 'APPR' status. Priority 3 and 4 work will go though some type of 'Planning and Scheduling' process and then will be routed accordingly.

2.2.2.1   *Work Order Planning*

Work Orders that require planning will be located in your "Inbox/Assignments" portlet on your Start Center with a description of "Work Order [Work Order #] Needs to be Planned."

1. Log in to Maximo with your username and password.

2. In your "Inbox/Assignments" portlet, click on the Work Order that you will start planning.

Typically, at this point in the process, the Manager would review and update key fields on the Work Order prior to routing it on to the next step. In this exercise, you will be asked to populate some these fields. Please note that depending on the record you selected, these fields may already have the values specified in them.

Before proceeding with planning the Work Order, you would want to review and validate the following:

- The Asset or Location is precise and accurate for the work being requested or problem reported.
- The Work Type is accurate.

Next you would determine if "Extensive" or "Minimum" planning is required. This drives how much time you will invest in planning the record and, therefore, which steps you will perform as well as how much time you will invest in performing those steps. (This is really a sliding scale and should be defined by your organization. Sample definitions provided below.)

- Minimum –
    - o Work has no historical value.
    - o Work estimate is not more than 4 total work hours.
    - o While parts may be required, no ordering is necessary.
- Extensive –
    - o All other work.

How much time you spend on the additional planning steps would be a sliding scale related to the size and complexity of the job.

Important: Minimum planning still REQUIRES some definition of scope and REQUIRES identification of planned labor. ALL Work Orders that go through planning should have planned labor even if it is an educated guess. This is critical information for scheduling.

2.2.2.2   Creating a Work Plan

Exercise – Creating a Work Plan

For this exercise, we will assume that "Extensive" planning is required.

For extensive planning, you would review the work history of the Asset or Location in Maximo to determine trends and conditions. This can be done many ways in Maximo. The simplest being:

1. Select "View Work Details" from the lookup on the Location or Asset field on the Work Order.
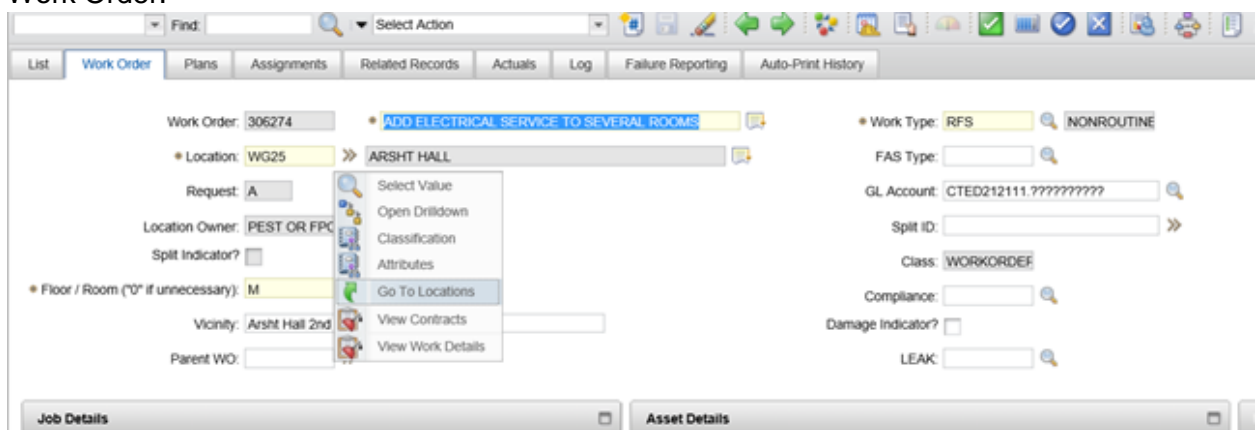
2. When done reviewing the work history, select "OK."

3. Typically, for extensive planning, you would also perform a field inspection to validate the request/problem, begin scoping the work, and identify potential constraints.

4. To define the scope of work, you can update the short description of the Work Order by entering text in the Description field. (You can click on the Long Description icon to add additional text, if necessary) or enter as the first task in the Tasks Table.

Note: Scope should be limited to a very high-level definition of actions or repairs to be executed (not step-by-step) including prep, coordination and wrap-up activities as well as actual work. It should also include identification of critical coordination elements for the work like access restrictions or required clearances.

5. Save the record 💾.

6. Navigate to the Plans tab of the Work Order by clicking on it to begin planning the work.

7. Select New Row in the Tasks section of the Plans tab.

8. Enter text into the Task Summary field to describe the first step of the Work Order.

Note: For complex jobs, you may want to populate the duration for each step. This would simply be done to make calculating the overall job duration easier.

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Also, if there is a condition monitoring point reading to be recorded, the ID of the Condition Monitoring Point can be entered in the Measure Point field.

9. Repeat steps 7 and 8 to add two additional steps to the Work Plan.

Alternate Method: If a suitable Job Plan for the work already exists, attach it by populating the Job Plan ID in the Job Plan field on the main Work Order tab.

Note: if "minimum" planning, do not spend time searching for a Job Plan. Only attach if already known.

10. Save the record 💾.

To identify the Materials required for the work:

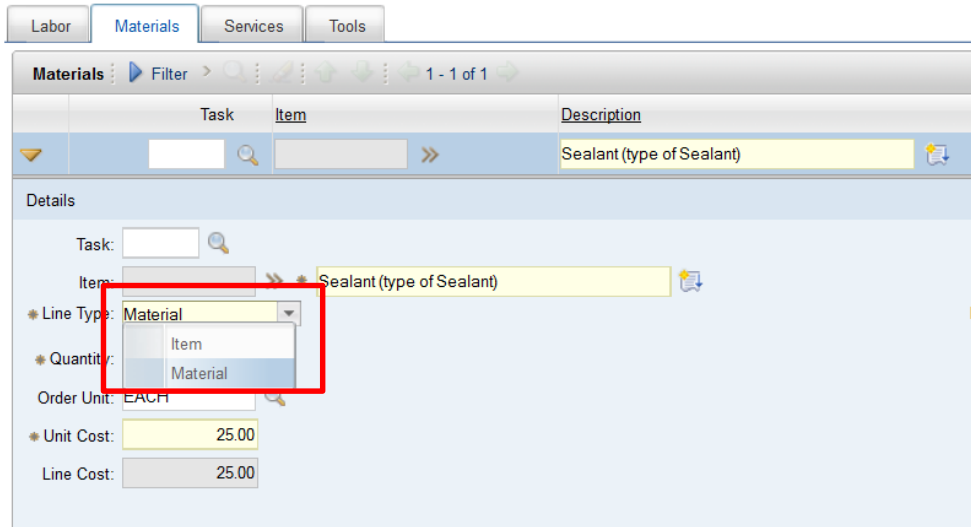11. Open the Materials tab on the Plan tab by clicking on it.
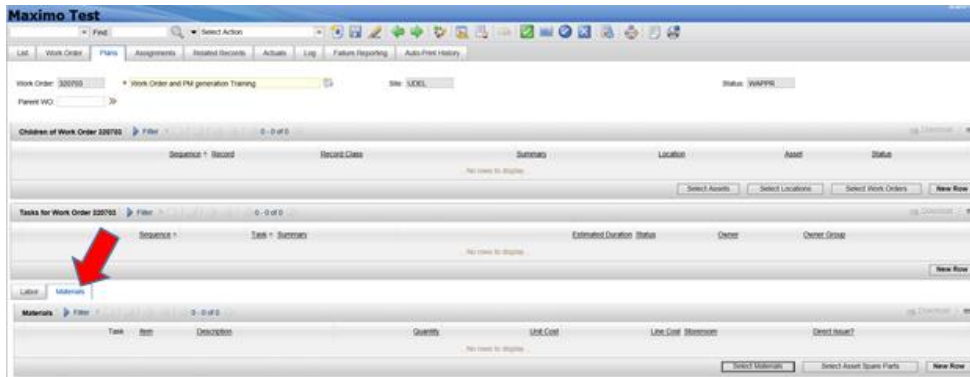
12. Select New Row on the Materials tab of the Plans tab.
13. In the Line Type field, open the drop-down list and select 'Material'.

14. Enter 'Sealant' in the Item Description field, enter '1' in the Quantity field, enter 'EA' in the Order Unit field, enter '25' in the Unit Cost field

Alternate Method: You can also select materials to plan for the Work Order by using the "Select Materials" or "Select Asset Spare Parts" buttons. To use select materials, the materials must exist in the Item Master in Maximo.

Note: Tools can be added on the Tools tab of the Plan tab in a similar fashion. Add a new row for each planned tool from the Tool room and enter the Tool ID and quantity. (If special tools are going to be required, but do not need to be issued from the Tool room, include in the Work Order Description.)
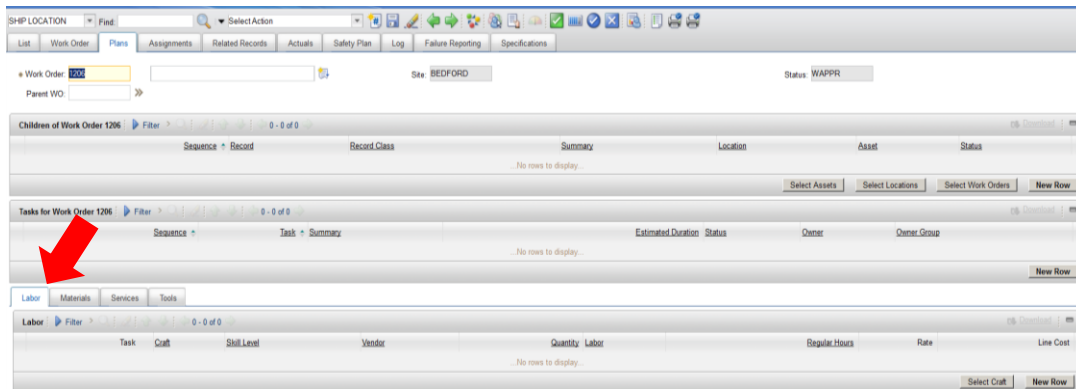
15. Save the record.

To identify the Labor required for the work:
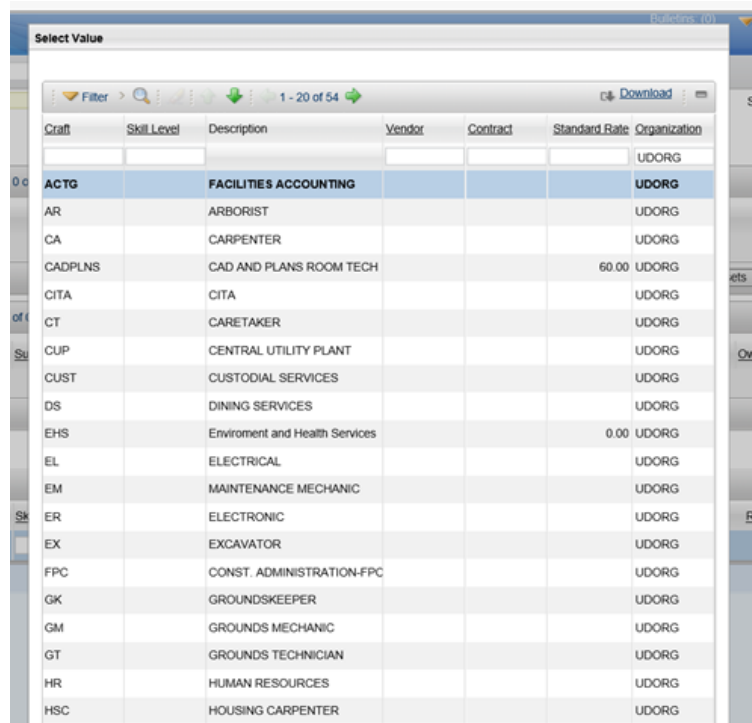
16. Open the Labor tab on the Plan tab by clicking on it.

17. Select New Row on the Labor tab of the Plans tab.

18. Select the Select Value ⟫ icon next to the Craft field to bring up a list of available Craft.

19. Select the Craft by clicking on it.

20. Enter '1' in the Quantity field (already populated) and enter '1' in the Regular Hours field to indicate that you will need one this Craft for one hour.
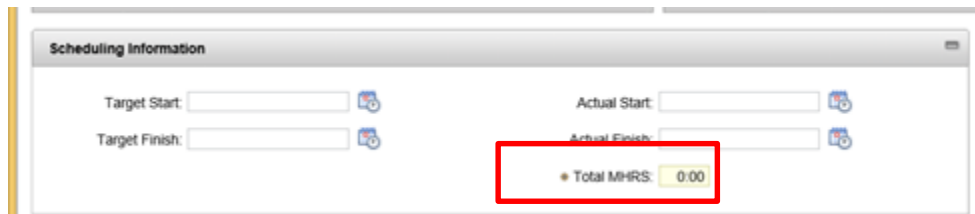
Note: In most cases, for labor durations, an educated guess by the planner is sufficient. This is particularly true for "minimum" planned Work Orders. For "extensive" Work Orders you might look at historical actuals from similar jobs.

Important: Craft, Quantity and Duration will be critical information for evaluating resource demand when scheduling and assigning using Scheduling and Dispatch applications. This information should be provided on ALL planned work orders!

21. Save the record 💾 .

22. To enter additional Planning/Scheduling/Routing information:

23. Navigate back to the main Work Order tab by clicking on it.

24. Enter '1' in the Duration field in the Scheduling Information section to signify that the Work Order should take 1 hour to complete, once started.

Note: Duration is the duration of the Work Order from start to finish. This is not the total effort. This is the amount of time that will elapse from when the work is initially started to when it can be called complete.

Also, you may optionally populate the Target Start and Finish Dates at this time. This is the allowable maintenance window for when this work can be scheduled.

25. Change the Work Group field as necessary to identify the Work Group that is to be responsible for the work.

26. Save the record 💾 .

Exercise – Creating a Job Plan from work plans

You can create a job plan from the work plan instead of recreating the work plan each time that you need it. When you create a job plan from a work plan, the Maximo uses the current work order and its tasks, planned labor, materials, tools, and services to create the job plan.

1. In the Work Order Tracking application, display the work order that contains the plan that you want to use to create a job plan.

2. Select the Create Job Plan from Work Plan action.

3. If the Job Plan field is empty, enter a value, or click Auto-number to have the asset management system assign a number to the job plan.

4. Click OK.

Note: It is recommended that you Name the Job Plan with a unique name that will make it easy to find and assign to future work. i.e. PUMP_REPL.

2.2.3   Work Order Assignments

Note: To Assign Labor through the Assignment Manager, the labor must have an assigned calendar. Assignment Manager Exercise will not be covered in on-site training but can be found in 5.3.6

All work that is in an approved status is ready to be assigned to craftspeople before routing to in progress (INPRG.)

Work that is ready to work can be assigned directly in the Work Order using the Assignments tab or in the **Assignment Manager** application.

2.2.3.1   *Assigning Work to Labor*

EXERCISE: Supervisor Assigns Work Orders Using Work Order Tracking

Work Orders can be assigned one-at-a-time using the **Work Order Tracking** application. This method might be used when there is a need to quickly assign one specific Work Order.

1. From the "Work Orders Requiring Assignment – My Work Group" result set on your Start Center, click on the Work Order Number of the Work Order to be assigned.

2. Navigate to the "Assignments" tab by clicking on it.

3. If there is planned labor on the Work Order, there will already be row in the Assignments section that just needs to the Labor field to be populated:

4. With the appropriate Assignment row highlighted, select the "Available Labor" button.
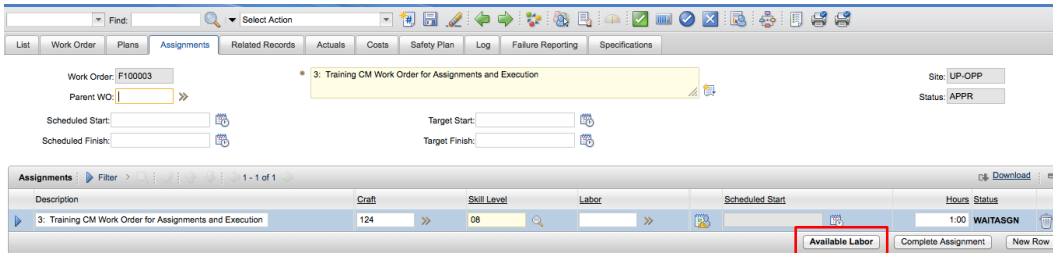
5. *Search for and select the appropriate Laborer by clicking on their Labor ID.*

6. Optional: You can update the "Scheduled Start" and/or "Hours" for the assignment by updating those fields in the Assignments section.
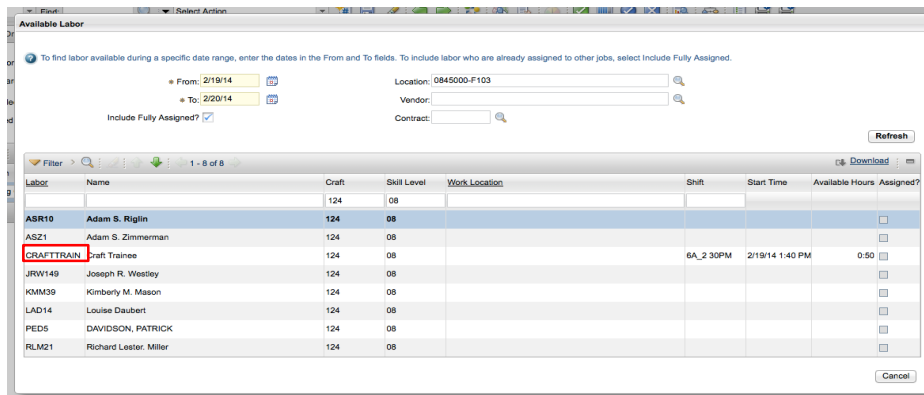
7. Save the record.

The Work Order is now assigned to the Laborer selected. Additional assignments can be made using the steps above or selecting "New Row".

Assignments can also be made in the Assignments Manager. To utilize Assignments Manager Labor must have an assigned calendar. This will not be covered in the on-site training, but exercises are included below in Appendix 1

2.2.4   Routing the Work Order

At this point the work order has been planned, scheduled and assigned and will now be routed to the next steps in the workflow.

Option	What Happens	Dependencies
Ready to Work	Work Status goes to 'INPRG', routes to Work Group or Assigned Labor	Must have assigned labor in Work Order to show up in in-box, otherwise will show up in all Work Group in-box.
Waiting Materials	Work Status goes to 'WMATLS', workflow in waiting status, Work Group Manager picks up in WMATLS results set when ready to work.	N/A
Waiting Plant Conditions	Work Status goes to 'WPCOND', workflow goes to waiting status. Work Group Manager picks up in WPCOND result set when ready to work.	N/A
Reassign	Work order status goes to 'REASSIGN', workflow routes to new Owner Group Manager	Must change Owner Group. Memo required with the reason for reassignment
Complete	Work order status goes to 'COMP' status and drops out of workflow	Following entries should be completed before routing: • Labor Time • Materials • Failure Codes • Work Log Updates

Note: Until the Work Order is in the complete (COMP) status, it might be reassigned multiple times and be taken through several of the statuses above. In some cases, it may even be taken the same status more than once.

Results should be setup on the Start Centers to help manage the work order process and status of Work. KPI's and reporting will also be provided to help Work Group Manager's oversee the process.

2.3   *Phase 3 – Review and Closure*

Once the work is completed and the technician has placed the work order in a 'CCOMP' or Craft Completed status, the next step is for the Work Group Manager to review and approve that the Work Order is ready to close.

2.3.1 Work Order Review

The Work Group Manager should take a graded approach to the review based on the complexity of the work. At a minimum the review should incorporate the following:

- Failure codes – The failure codes should be reviewed to ensure accuracy
- Work Log - Verify completeness and usefulness of the logs. Review to determine if the logs contain all the information needed including how the job was found, what was done and how the job was left. (As Found/As Left.)
- Follow-up Work – is there follow-up work required and has a follow-up work order been generated.

Work Orders that required more extensive planning should require a more thorough review. This review should look at the job plan and its components for possible improvements. Review should include:

- Plans Tab vs. Actuals Tab – Manager should look at the plans vs. the actuals to determine if a pre-existing job plan should be modified
- Plans tasks – Verify that the tasks were all completed and if any changes need to be made to a saved job plan.
- Materials – Review the materials planned vs. the materials used (if available). Ensure all unused materials are returned and modify saved job plans as needed.

After a review of all the applicable sections the next step if for the Work Group Manager to route the Work Order to the following options:

Option	What Happens	Dependencies
Follow-up	Work order status goes to 'COMP' status with 'Follow-up Work Order' in the description. A new Follow-up work order is generated and routed to the Work Group Manager's Inbox status 'APPR'	Following entries should be completed before routing: • Labor Time • Materials • Work Log Updates
Complete	Work order status goes to 'COMP' status and drops out of workflow	Following entries should be completed before routing: • Labor Time • Materials • Failure Codes • Work Log Updates

Work Orders will remain in a completed status until they are "Final Billed", meaning all material costs, and labor costs have been back loaded. An integration with the accounting system will update the billing information on Work Orders.

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2.3.2   Work Order Closure

An escalation will monitor the system for Work Orders that are in Completed (COMP) status and close automatically after 90 days.

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3 Preventative Maintenance

3.1 Work Order Workflow Process for Preventative Maintenance (PMs)

Preventive Maintenance work (the PM work type) is always initiated from the Work Order generation process off of a Preventive Maintenance record. A Preventive Maintenance record already contains the information that would be populated during Dispatch or Planning and is already approved. Therefore, these Work Orders can go directly to Work Group Manager for scheduling and/or assignment. Once generated, PM Work Orders follow the exact same process as "On Demand Work Management" beginning at Phase 2, all the way through closure.
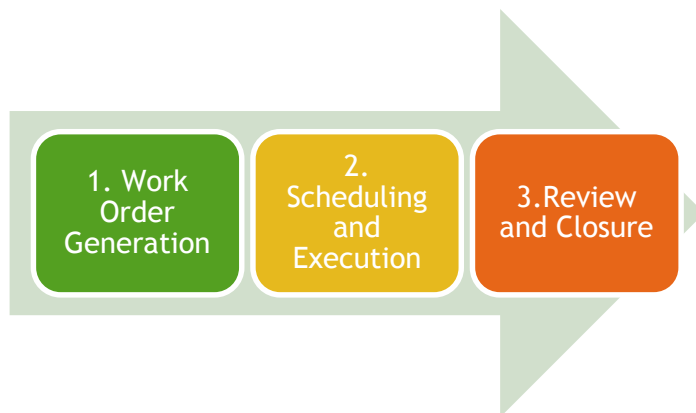
3.1.1 Phase 1 – Work Order Generation

Preventive Maintenance (PM) Work Orders are either generated automatically, via a cron-task, or manually from the **Preventive Maintenance** application. These Work Orders will either generate in an Approved (APPR) status and will enter Phase 2 of the "On Demand Work Management" process at the appropriate place based on that status.

3.1.2 Phase 2 – Planning, Scheduling and Execution

Phase 2 of the PM workflow process is identical to Phase 2 of the "On Demand Work Management" process for scheduling, assignment and execution. Please see the "On Demand Work Management Process – Phase 2" above to see how a PM Work Order is scheduled, assigned and executed.

3.1.3 Phase 3 – Post-Completion Review and Closure

Phase 3 of the PM workflow process is identical to Phase 3 of the "On Demand Work Management" process for post-completion review and closure. Please see the "On

Demand Work Management Process – Phase 3" above to see how a PM Work Order is processed through post-completion reviews and closure.
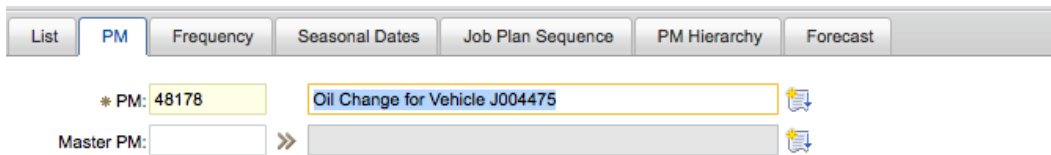
Exercise – Create a PM

When you create PMs, you can associate routes, specify work order status, define frequency, set seasonal dates, assign job plans, and create hierarchies. After PMs are created, you can change the status, generate work orders, override the due date, set meters, and set counters.

PMs are created when it has been determined that there is value in performing a routine, scheduled preventive maintenance activity on an asset or location (or route of assets/locations.)
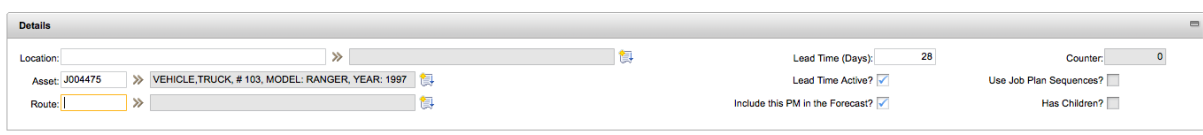
To Create a PM:

1. Log into Maximo using your username and password.
2. Navigate to the PM application using the Go To menu → Preventive Maintenance→Preventive Maintenance.
3. Select the New PM toolbar button .
4. Enter a description in the description field.

| List | PM | Frequency | Seasonal Dates | Job Plan Sequence | PM Hierarchy | Forecast |

* PM: 48178   Oil Change for Vehicle J004475

Master PM: »

5. Select an Asset or Location through the menu by hitting the » and the Select Value 🔍 button.

Note: A PM record can also be associated with a Route (list of Locations/Assets.)

Details

Location:	»			Lead Time (Days):	28		Counter:	0
Asset: J004475	» VEHICLE,TRUCK, # 103, MODEL: RANGER, YEAR: 1997			Lead Time Active? ✓		Use Job Plan Sequences? ☐
Route:	»			Include this PM in the Forecast? ✓		Has Children? ☐

6. Optional: Build a PM for the assets on a route. In the Route field, specify a value.(covered below in section????)
7. If a pre-defined job plan exists, enter the job plan # or select a job plan by selecting the menu » and the Select Value 🔍 button
8. Ensure work type is PM.
9. Enter APPR for work order status

10. Enter the Lead and the Owner Group

11. Save the record 🖫.
12. Click the Frequency tab. In the Work Order Generation Information section, select the following check boxes as appropriate:
    - Use Last Work Order's Start Date to Calculate Next Due Date

      Select this check box if you want generated work orders to be calculated from the target start date of the last work order. If you do not want to calculate the Next Due Date based on the target start of the last work order (for example, if you want the next work order to be generated when the last work order was completed instead), clear the check box.

    - Generate Work Order Based on Meter Readings (Do Not Estimate)

      Select this check box if you want work orders generated only when the defined meter reading has been reached. Clear this check box if you want the next work order due date to be based on the average metered usage.

    - Generate Work Order When Meter Frequency is Reached

      Select this check box if you want work orders for this PM to be automatically generated when the meter frequency has been reached and entered. This check box can only be selected if the Generate WO Based on Meter Reading (Do Not Estimate) check box has been selected.

13. Define the frequency with which you want the PM to generate work orders. The PM frequency can be time-based, meter-based, or both.
    - For time-based master PMs, define the frequency criteria as wanted.
    - For meter-based master PMs, define the frequency criteria as wanted.

14. If the PM is a seasonal PM, define the days/dates that you want the PM to be active on the Seasonal Dates tab.

    Note: You can define the lead time for preventive maintenance (PM) alert messages so that alerts display before work orders are generated.

To

15. In the Preventive Maintenance application, display the PM record that you want to define alert lead time for.
16. Click the Frequency tab.

- o For time-based PMs, on the Time Based Frequency subtab, specify the alert lead time (in days) in the Alert Lead (Days) field.
- o For meter-based PMs, click the Meter Based Frequency subtab, then click the Detail Menu to display the meter information. If no meter was previously defined, define one now by clicking New Row. Specify the alert lead (in meter frequency units) in the Alert Lead field.

17. Click Save PM.

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4 PROJECT WORK ORDERS (CAPP and NCAP)

4.1 Work Order Workflow Process for Jobs

Project (CAPP and NCAP) are typically initiated based on the activation of a Project Contract. For this reason, these work orders are created manually in Maximo by a user familiar with the project.

Project Work Orders must be planned before they are approved for use to record time and materials against. From start to finish, work orders with this work type may proceed through the following phases, each of which will be described in greater detail:
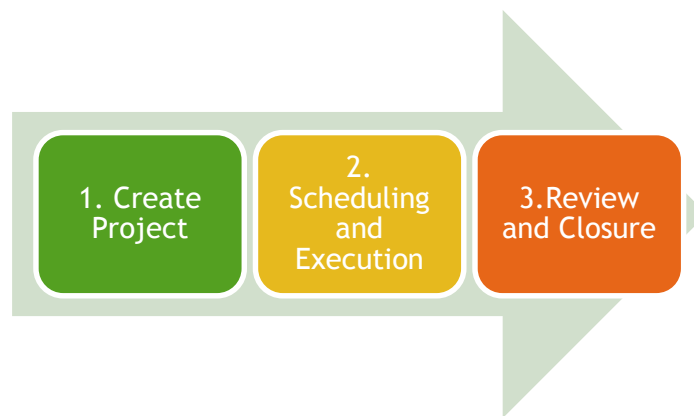
4.1.1 Phase 1

During Phase 1 – Create Project, the Project Work Order is not yet in workflow. At this phase the user has created and is populating key elements of the record. Once the Work Order has the critical project information, the user will initiate workflow, ending this phase.

4.1.2 Phase 2

During Phase 2 – Planning, Scheduling and Execution, Job Work Orders follow the exact same process as "On-Demand Work" described in Section 1. Once a Work Order leaves Phase 1 of this process, it starts at the "APPR" step of the "On-Demand Work" process and follows the same steps of that process until the Work Order is completed (COMP) at the end of Phase 2.

4.1.3 Phase 3

During Phase 3 – Post-Completion Review and Closure - Job Work Orders follow the exact same process as "On-Demand Work – Phase 3" described in an earlier section.

5 Enter a Work Order – Not generated through Dispatch

In this section, you will learn about the different components of a Work Order. Each tab of the Work Order application will be presented along with a description of its use.
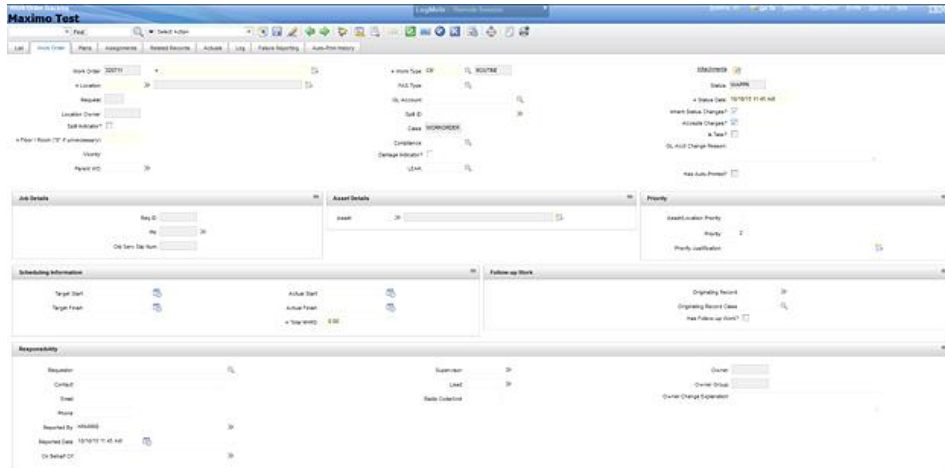
Specific sections or fields on the tab will be highlighted related to how the information is typically populated (i.e. Work Request, Triage, Planning, Scheduling, Execution, etc.)

5.1 Work Order Tab – Header Section

This section is where the basic detail and high-level scope of the Work Order is captured. The Key fields to be populated are identified below:

Field	Populated
Work Order Number	Auto-populated by system.
Description/Long Description	From Service Call if generated by Dispatch. Contains pertinent information to describe the work to be performed
Asset/Location	From Service Call if generated by Dispatch. Identifies the Asset and Location of the Work
Work Type	CAPP, NCAP
Problem Code	N/A
GLACCOUNT	Generated by Location and Owner group

Field	Populated
Status/Status Date	Changed through workflow.

5.2 Work Order Tab – Job Details Section

This section is where you associate the Work Order to a Pre-saved Job Plan, Safety Plan, PM or contract. The key fields to be populated are identified below:

Field	Populated
Job Plan Revision #	During Planning if applicable.
PM	N/A
Safety Plan	During Planning if applicable
Contract	N/A

5.3 Creating a Work Order

5.3.1 From your Start Center, select the "Create New Work Order" link in the "Quick Insert" portlet.

5.3.2 NOTE: If you are in the "Work Order Tracking" application, you can use the "Start New Work Order" icon [icon] on the Toolbar.

5.3.3 Enter a description of the work in the "Description" field. Note that this field has a limited number of characters that can be entered. You can select the "Long Description" icon to access more writing space, if you need it.

5.3.5 Populate either the Location and/or Asset field with a valid Location/Asset.

5.3.6 Populate the Priority.

5.3.7 Save the Work Order using the "Save" icon on the toolbar [icon].

5.3.8 The steps for creating a Work Order are now complete. The Work Order should be in a 'WAPPR' status and will be available for the Work Group Manager to Plan. For creating the job plan see 2.2.2.2
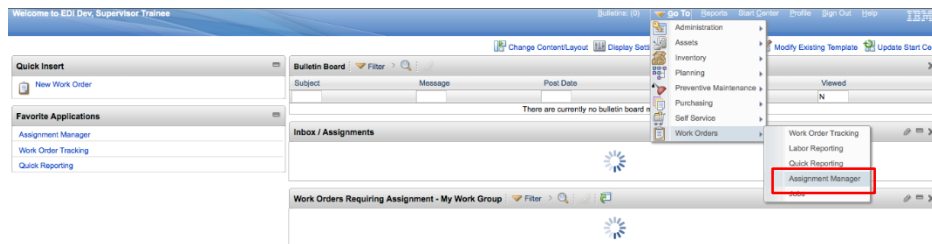
Appendix 1 - Assignment Manager

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EXERCISE: Supervisor Assigns Work Orders Using Assignment Manager

Work Orders that require Assignment will be accessible via a Saved Query in the **Assignment Manager** application.

Note: Every Manager/Supervisor/Lead that will be assigning work should have a default saved query in Assignment Manager. Your saved query should be looking for Work Orders that are for your "Work Group" that aren't currently assigned.

1. Use the "Go To" menu to navigate to → **Work Orders Assignment Manager**.

In **Assignment Manager**, your view will be split into two separate windows. The top window, "Work List", will present you with Work Orders that require assignment. The bottom window, "Labor List", will present you with Laborers that are available to be assigned to Work Orders. You should have default saved queries established to isolate work you, specifically, need to assign in the "Work List" and Laborers you, specifically, are responsible for in the "Labor List". Your job will be to match up Work Orders with Laborers based on skill set and availability.
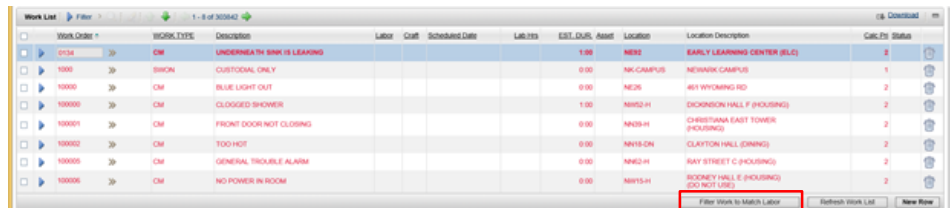
To assign a Work Order to a Laborer:

2. Place a check mark in the box to the left of the Work Order to be assigned, by clicking on it.
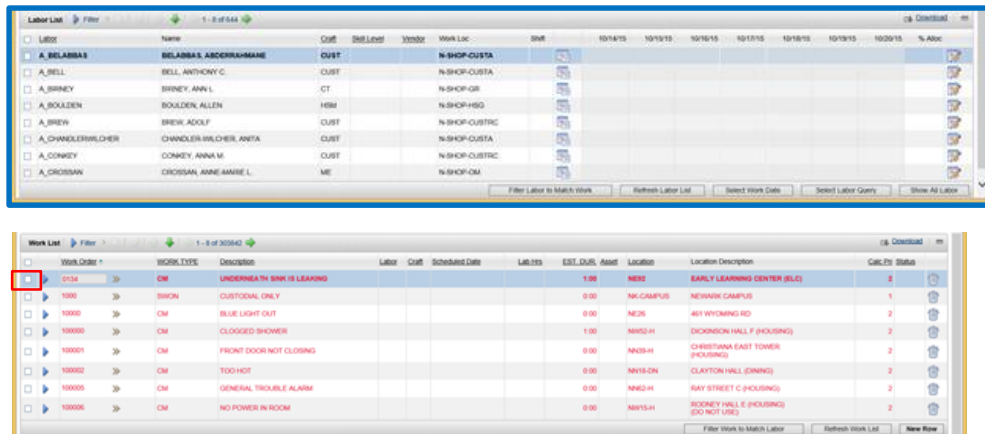

Note : If you want to assign more than one Work Order to a Laborer at one time, you can select multiple Work Orders from the Work List at once.

3. OPTIONAL: If you have more Laborers in your Work Group than will fit on a single page in the Labor window, you can select the "Filter Labor to Match Work" button and then select "OK" to isolate only the Laborers whose Craft/Skill match the Craft/Skill required by the work (assigned in the plans).

4. To assign the Work Order to the Laborer on a specific day, you can click on the available hours displayed for that Laborer for the specific day.
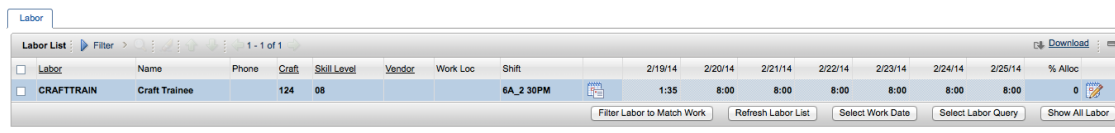
Note: You can view other available days by selecting "Select Work Date" and choosing another date. By default, the system shows you today plus the next 6 days.

If there was a planned labor entry on the Work Order and it is a match with the Craft/Skill of the Laborer selected, the assignment will be made automatically and the availability of the Laborer updated to reflect the assignment.

Note: If there was not a planned labor entry on the Work Order or the Craft/Skill planned does not match the Craft/Skill of the Laborer selected, and additional pop-up window will be displayed where you can update the assigned duration and confirm the assignment.

Alternate Method: You can also make an assignment by placing a checkmark in the box to the left of the Laborer(s) you want to assign the work to and selecting the Assign Labor icon from the toolbar. Please note that this method is the required method for assigning multiple Laborers to a Work Order at once (by checking the box for more than one Laborer.)

Typically, a Manager/Supervisor/Lead would come into **Assignment Manager** on regular basis to assign multiple Work Orders for the next shift or next several shifts. The steps above can be repeated until all Work Orders to be assigned have been assigned to Laborers.

EXERCISE: Supervisor Reassigns Work Order Using Assignment Manager

Occasionally, a Manager/Supervisor/Lead may need to reassign Work Orders that have already been assigned. This can be done using the **Assignment Manager** application.

Important: This method should only be used if the assignment has not yet been started. If the assignment has been started, then the current assignment should be completed in the system and a new Assignment created for the Work Order.

To reassign an assignment that hasn't been started:

1. Use the "Go To" menu to navigate to Work Orders → Assignment Manager.
2. In the Labor List section, find the Laborer that currently has the assignment and select the "Show Assignments" icon in that row.

3. In the "Show Assignments" dialogue window, click on the "Mark for Deletion" icon to the right of the assignment to be reassigned and select "OK."

4. In the "Show Assignments" dialogue window, click on the "Mark for Deletion" icon to the right of the assignment to be reassigned and select "OK."

To reassign the Work Order to a new Laborer:

5. Place a checkmark in the box to the left of the Work Order to be assigned, by clicking on it.

6. To assign the Work Order to the new Laborer on a specific day, you can click on the available hours displayed for the new Laborer for the specific day.

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