Work Order - Maintenance

AiM

2019

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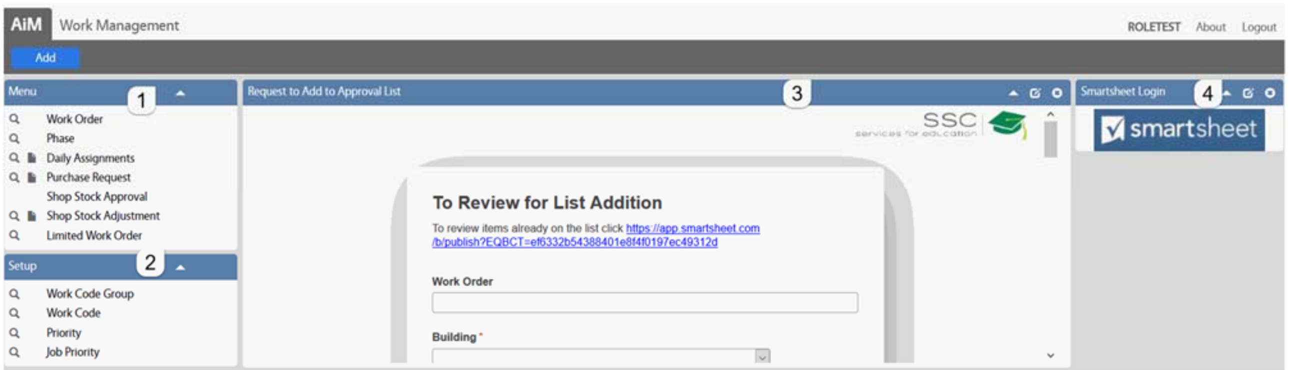
Work Management Module

The Work Management Module contains the primary screen for tracking work. All charges are tied back to a Work Order at the Phase level. This module allows access to Purchase Requests (formerly Material Request) and Daily Assignments.

This screen shot is of the Work Management Module WorkDesk



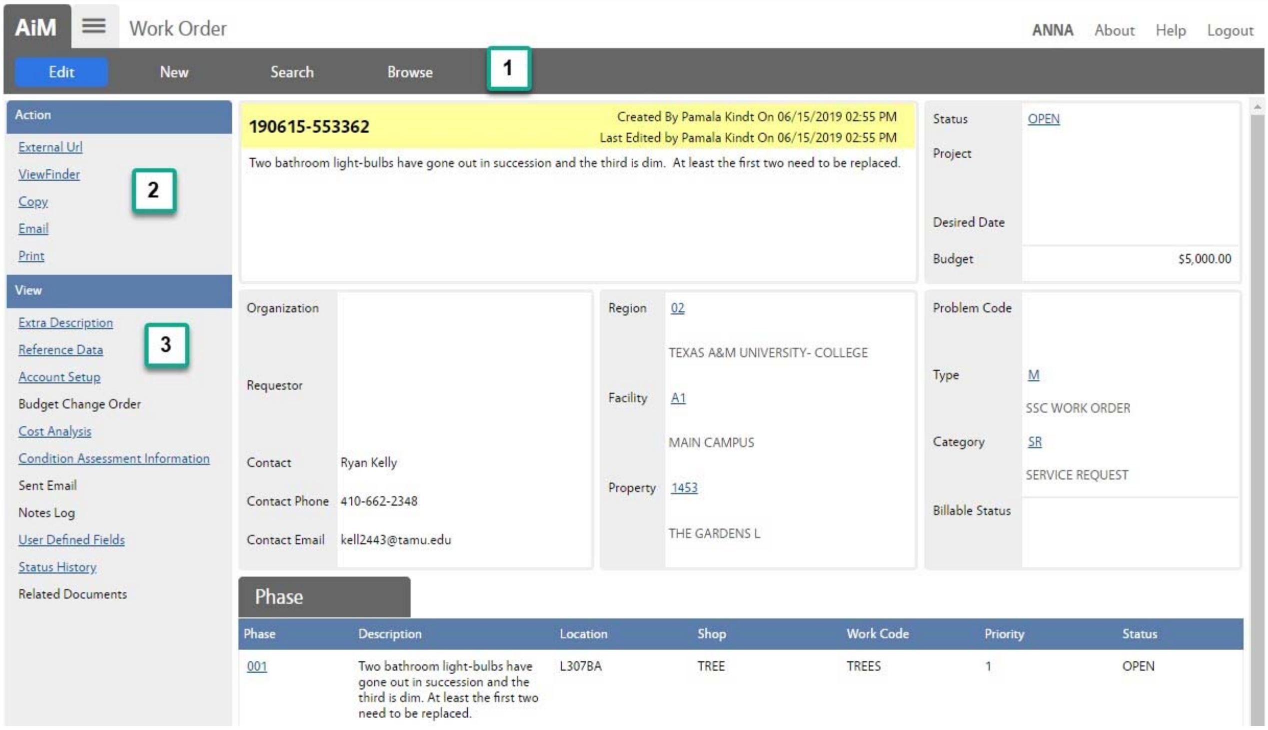
Screen Functions

- Work Order – Access to the Work Order screen
- Phase – Access to the Work Order records, but opens at the Phase level. If a Work Order has multiple Phases, the Work Order will appear multiple times in the browse list.
- Daily Assignment – List of Work Orders a technician should complete in a day. Populates the Assignment section in Fire – O&M (formerly iDesk).
- Purchase (Material) Request – request material and contract support from the warehouse

Work Order Concepts

- Work Order (WO) is the primary screen for tracking work in AiM.
- Every WO must have at least one Phase.
- Each Phase may only be assigned to one Shop.
- All charges are posted to a Phase.
- Multiple WOs can be grouped in a Project.
- WO numbers follow this format – yymmdd-######.
- Each WO can only have one Type and Category. Type and Category dictate the work flow in AiM. Each WO can only have one building assigned.

Work Order Screen Section Explanations



1. Navigation Buttons

- Edit – Allow changes on the screen
- New – Creates a new record
- Search – Go to the search screen to find a different record
- Browse – Return to the list of records already retrieved through a search

2. Action Menu

Actions available while NOT in Edit

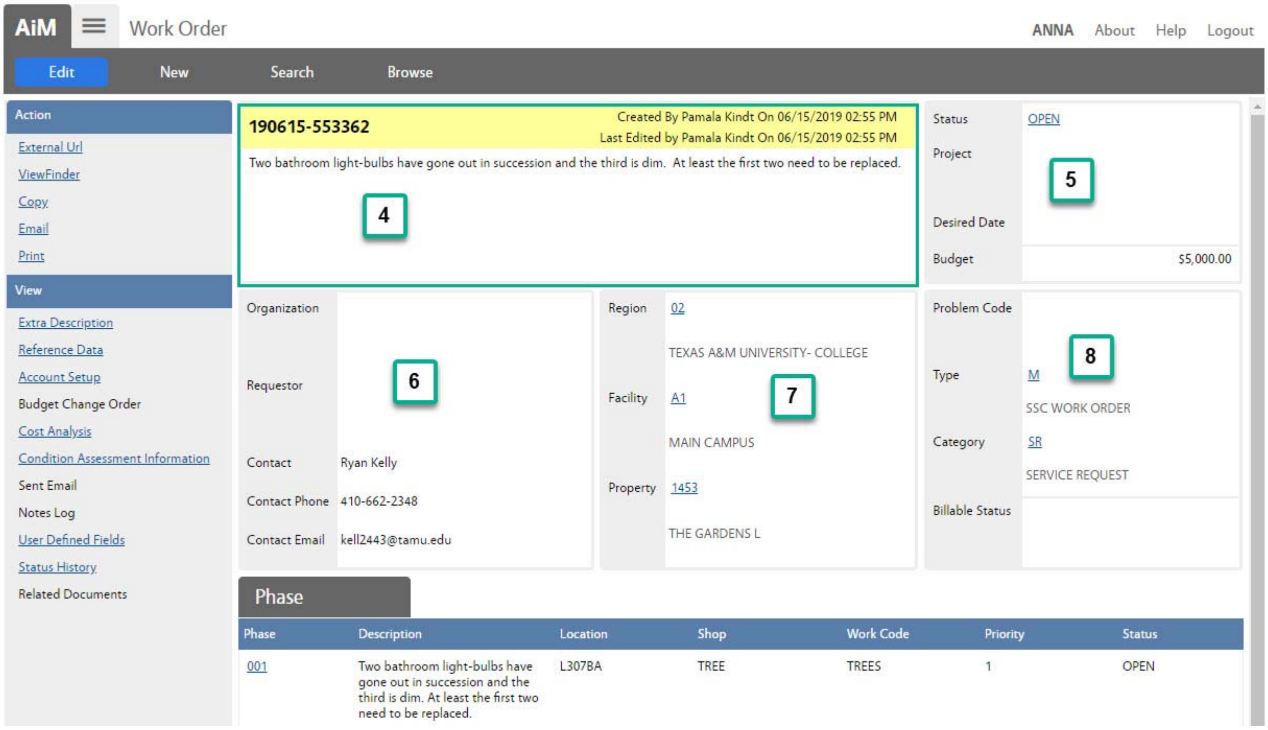
- External Url – Link to the Budget Tool
- ViewFinder – List of all related screens and documents (example – Purchase Request, Time Cards, & Related Documents)
- Email – Send an email to someone with the link to the record. Link only accessible if they have an AiM login.
- Print – Print built in reports for this record.

3. View Menu

Access to additional screens for this record. Items in blue and underlined already have data entered.

- Extra Description – All data received from the AggieWorks website. If Description field goes over 255 characters the excess will appear here.
- Reference Data –
  - Responsible Shop – Responsible for entire Work Order
  - Customer Request number
  - Reference number – A number provided by the customer to help them identify the work.

- Account Setup – Account paying for the work.
- Cost Analysis – Charge summary for the entire WO
    - Estimate – Role up of Phase estimates
    - Actual – Accumulation of charges posted.
    - Encumbered – Cost for items that have been ordered, but not posted yet.
    - Billed – Amount run through the bill generator to invoice customer.
- Sent Email – link to emails tied to the Work Order
- Notes Log – Notes about the work completed. Notes at Work Order level are not accessible by the customer.
- User Defined Fields
    - Customer Request #
    - Invoice #
    - Fields to document the TAMU approval status.
    - Fields to indicate that a billable WO has been reviewed and approved by a Maintenance Manager.
- Status History – List of saved WO statuses with who made the change and when.
- Related Documents – Documents attached at the WO level. Documents uploaded with the Customer Request will appear here.



***Each boxed section, as highlighted by the green rectangle, is called a block.*

4. Title Block

- Work Order number – Format yymmdd-######
- Who Created the WO and when
- Last editor of the WO and when
- Description of the WO – What the customer submitted on the AggieWorks site

5. Status Block

- Status – Current WO status
  - ♦ Open – *Email sent to customer & proctor*
  - ♦ Work Started – *Email sent to customer*
  - ♦ Req TAMU Approval – Work Order has been added to the TAMU approval list. Once approved work will resume. *Email sent to customer*
  - ♦ WO Complete – All phases complete; No additional work needed; *Email sent to customer & proctor*
  - ♦ WO Reviewed – All charges are posted; Billing Coordinator can bill
  - ♦ Redirected – WO needs to go to a different to be directed to another SSC Department, Utilities, or Building Access
  - ♦ Transferred to UES – AggieWorks has completed the transfer to Utilities
  - ♦ Transferred to BA - AggieWorks has completed the transfer to Building Access.
  - ♦ Transferred to GRNDS – AggieWorks has completed the transfer to Grounds; New WO created
  - ♦ Possible Project – Supervisor is submitting WO to Maintenance Operation Manager for approval to forward to a project manager.

- EDCS Decline – WO being sent back to Mainteanance
  - Project Created – EDCS created a project in EBuilder
  - Reopen – Work Order had been Canceled or Closed. Reopened by Billing Coordinator
  - Closed - Used on non-billable WOs
  - Canceled – No work to be done
  - Duplicate – Work is being completed on a different WO
  - Billed – Work has been invoiced to the customer
- Project – ties WO to other WOs. Used when there is more than one WO for the same event/job.
- Desired Date – Date customer indicated for an event
- Budget – Budget will default to $5,000. The budget is enforced. Budget can be updated by the Billing Coordinator.

6. Customer Block

- Organization – Customer's associated department
- Contact – Name of person who submitted the WO.
- Contact Phone – Phone number to use to contact the customer.
- Contact Email – Address that automated emails go to.

7. Property Block

- Region – 2 digit member number for the agency with majority building usage according to TAMU Facility Coordination
- Facility – TAMU Facility Coordination 2 digit code for the area of campus building is located
- Property – Official building number assigned by TAMU Facility Coordination.

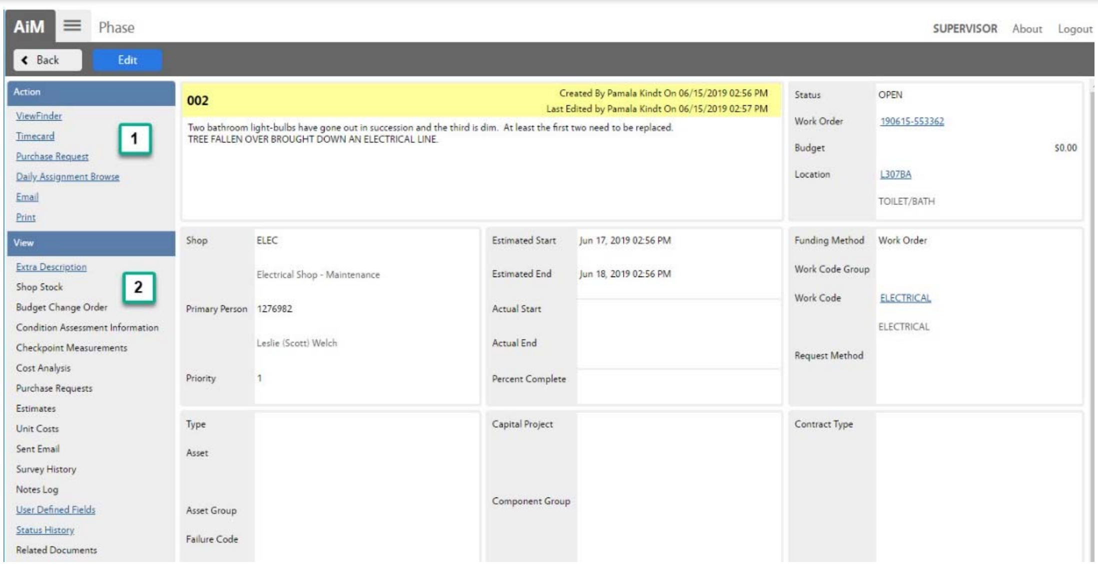
8. Classification Block

Once Type and Category are saved, they cannot be changed.

- Problem Code – used in the Customer Request Promotion process to default fields on the WO.
- Type – M for SSC Work Order
- Category – Drives the work flow on the WO. Filters statuses and work codes.
  - SR – Service Request – Work requested by customer
  - CM – Corrective Maintenance – Work initiated by SSC
  - PPM – Planned Preventive Maintenance
  - EV – Events – Support requested for scheduled events (ex: basketball game)
- Billable Status – Indicates if the WO is billable or not.
  - NON BILLABLE –
    - covered under contract
    - cost remains under $5,506.17 (amount changes Aug 3 each year)
  - PM5K –
    - Maintenance work that goes over $5,506.17 (amount changes Aug 3 each year)
    - Must be approved by TAMU
    - No markup on contractors or materials

♦ BILLABLE –
  ▪ Events
  ▪ Special Requests
  ▪ Building Not on Contract
  ▪ 100% funded by customer
♦ DEFERRED –
  ▪ Deferred Maintenance
  ▪ Must be approved by TAMU no matter the $ amount
  ▪ Items that have been designated as deferred
  ▪ Items that should have been replaced many years ago
♦ SSC PAY –
  ▪ SSC is paying amount over $5,506.17 (amount changes Aug 3 each year)
  ▪ SSC paying for a job that is typically billable

Phase Screen Section Explanations



1. Action Menu

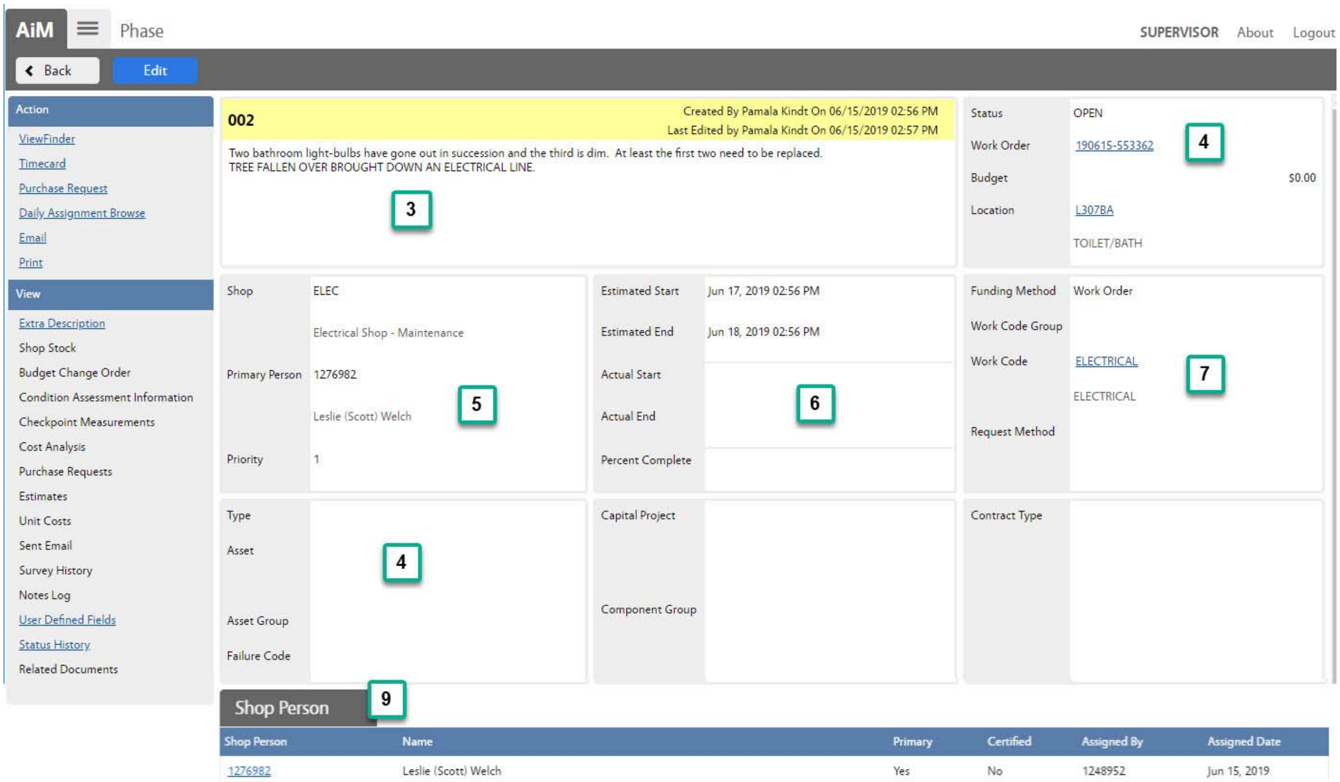
Actions available while NOT in Edit

- ViewFinder – List of all related screens and documents (example – Purchase Request, Time Cards, & Related Documents)
- Timecard – Create a new timecard for this Phase
- Purchase Request – Create a new Purchase Request tied to the Phase (formerly Material Request)
- Daily Assignment Browse – Lists any Daily Assignments that contain the Phase
- Email – Send an email to someone with the link to the record. Link only accessible if they have an AiM login.
- Print – Print built in reports for this record.

2. View Menu

Access to additional screens for this record. Items in blue and underlined already have data entered.

- Extra Description – All data received from the AggieWorks website. If Description field goes over 255 characters the excess will appear here.
- Account Setup – List the account(s) paying for the work.; only used when the phase account should be different from other phases
- Shop Stock – Material used on the WO that was not released by the Warehouse.
- Condition Assessment Information – Not used at this time.
- Checkpoint Measurements – PM Standard items on preventive maintenance WOs
- Cost Analysis – Charge summary for this Phase
  - ♦ Estimate – Can enter amounts estimated to be spent.
  - ♦ Actual – Accumulation of charges posted.
  - ♦ Encumbered – Cost for items that have been ordered, but not posted yet.
  - ♦ Billed – Amount run through the bill generator to invoice customer.
- Purchase Requests – Link to Purchase Requests that have been submitted for this Phase
- Estimates – Not used at this time.
- Unit Costs – Not used at this time.
- Sent Email – link to emails tied to the Phase
- Survey History – Customer survey results.
- Notes Log – Notes about the work completed. Notes at Phase level are accessible by the customer. Technician notes from Fire O&M will appear here.
- User Defined Fields
- Status History – List of saved Phase statuses with who made the change and when.
- Related Documents – Documents attached at the Phase level.



3. Title Block

- Phase number – Auto generated (ex: 001, 002 …)
- Who Created the Phase and when
- Last editor of the Phase and when
- Description of the Phase – Work to be completed on the phase

4. Status Block

- Status – Current Phase status
  - Open – Phase has not been assigned to a technician
  - Assigned – Phase assigned to technician(s); phase will appear in Fire app. *Email sent to customer.*
  - External Resources – Work has been subcontracted
  - In Progress – Technician is working on the phase
  - Await Materials – Materials have been ordered. Work is on hold until material arrives
  - REQ Assistance – Work needs additional resources (another shop, contractor, etc)
  - Bldg Access Recomnd - Notifies AggieWorks Center to send a Customer Request to Building Access because the job cannot be completed by Facilities.
  - UES Recomnd – Notifies AggieWorks Center to send a Customer Request to Utilities because the job cannot be completed by Facilities.
  - Possible Project – Supervisor is submitting WO to Maintenance Operation Manager for approval to forward to a project manager.
  - PHS Complete – All work is done. Just waiting on charges to post.

  - Contractor Complete – Contractor has completed work. Just waiting on charges to post
  - Reviewed – WO has been reviewed to insure all charges have been posted. It is now ready for billing.
  - Ready to Bill – Charges have been processed and sent to corporate accounting to invoice the customer.
  - Billed – WO invoice has been sent to customer.
  - Duplicate – There is another WO for the same job. (Add a note with the other WO#.)
  - PHS Cancel – No work to be done. No charges on the WO
  - Closed - Used on non-billable WOs
  - Reopen – Phase had been Canceled or Closed. Reopened by Billing Coordinator
- Work Order – Link to the WO screen
- Budget – Phase budget is not enforced and remains at $0
- Location – The location/space/room in the building where the issue is happening.

5. Shop Block

- The responsible Shop for the Phase
- Primary Person – Technician listed as "Primary"
- Priority – Timeframe to complete the work.
  - 1 – Complete in 0 to 1 day
  - 2 – Complete in 2 to 5 days
  - 3 – Complete in 6 to 10 days
  - 4 – Scheduled work or event
  - PM1 – Preventive Maintenance 1
  - PM2 - Preventive Maintenance 2
  - PM3 - Preventive Maintenance 3

6. Estimated Dates Block

- At this time this section is not used. The dates default based on the priority of the phase.

7. Classification Block

- Funding Method – Maintenance uses –
  - Work Order - account at the Work Order level
  - Shop –Preventive Maintenance
- Work Code Group – Grouping of Work Codes
- Work Code – Type of work needed for this request
- Request Method – Not used at this time.

8. Asset/Equipment Block

- Type – Asset
- Asset – The assigned Asset number. Found on a SSC barcode sticker on the equipment.
- Asset Group – Type of equipment

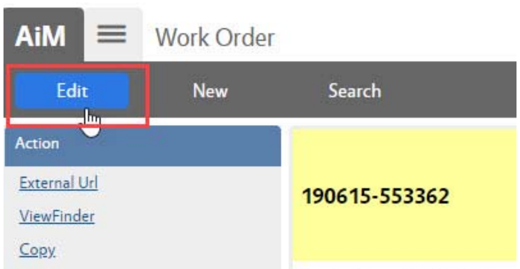
- Failure Code – Not used at this time.
- Template – will appear if this is a system generated Preventive Maintenance WO
- PM Standards – The standard used for a Preventive Maintenance WO to create the Checkpoints

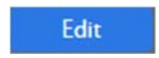
9. Shop Person Block

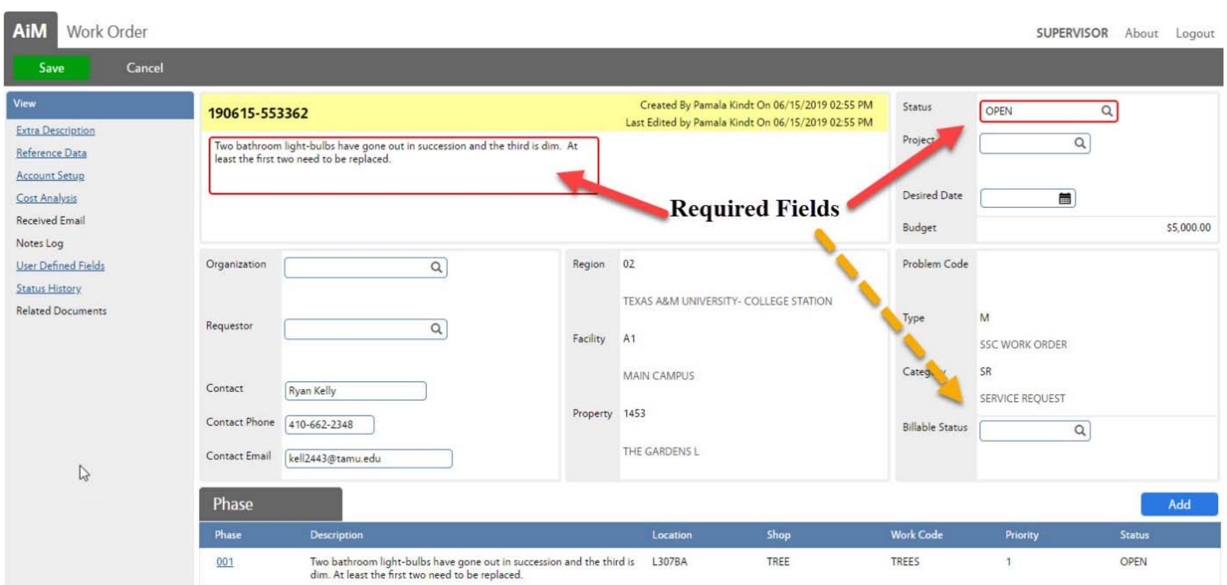
- List of employees assigned to this Phase

Editing the Work Order

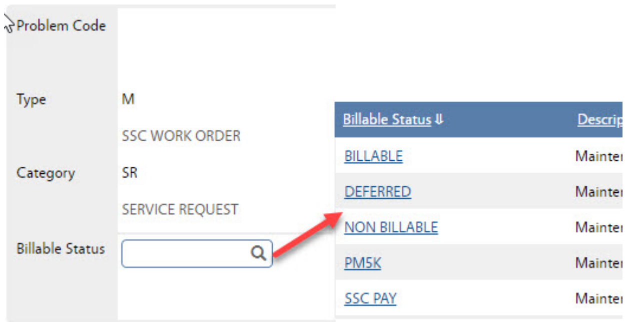
Fields to check at Work Order Level



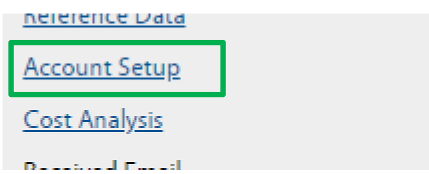
1. On the Work Order, Click 



- Items in RED are required fields.
- Billable Status is not RED, but is required before saving the WO with a status of WO Complete
- Items without a box cannot be edited.

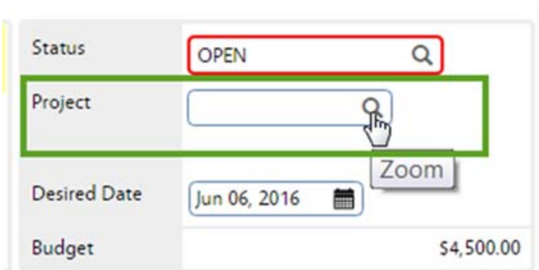


2. Billable Status indicates who is paying for the work. Choose the correct billable status. To return to the previous screen without making a selection, click Done or Cancel on the Navigation bar. If there is already a choice in the field, Cancel will leave the original entry while Done will clear the entry.



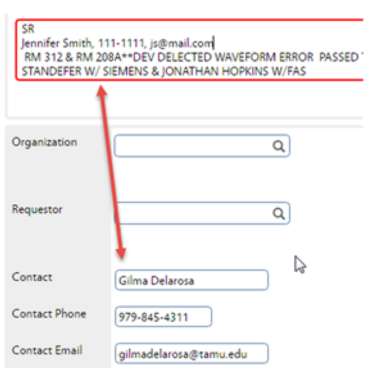
3. Account Setup
   a. If the Work Order is Billable, then the Account Setup should have the customer's account. Set this before doing the work.
   b. If PM5K, then the Account Setup will have 26543 and the customer's account.

Instructions to setup Account below

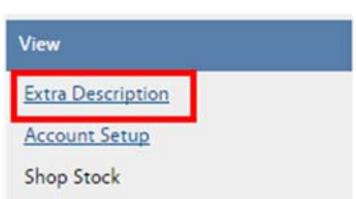


4. Check the Project field. Is this part of an event? If yes, type in the provided Project number or click the Magnify Glass to search for the Project.

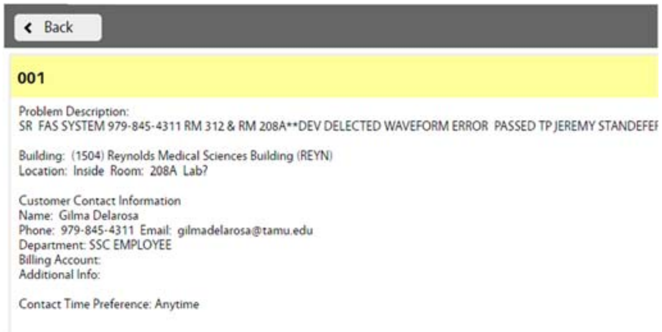
***Project number format for events is mmddyy-descriptive word. Ex: 052515-MDFLOOD Preventive Maintenance WOs may also be tagged to an autogenerated Project number.*



5. Check the Contact information.
   a. Sometimes the contact information will be a SSC employee
   b. If customer information is in the Description field, update the Contact fields. This will ensure the customer gets the emails instead of the SSC employee.



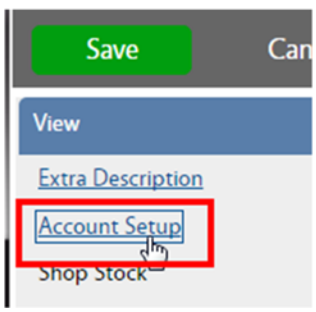
6. From the View menu, choose Extra Description



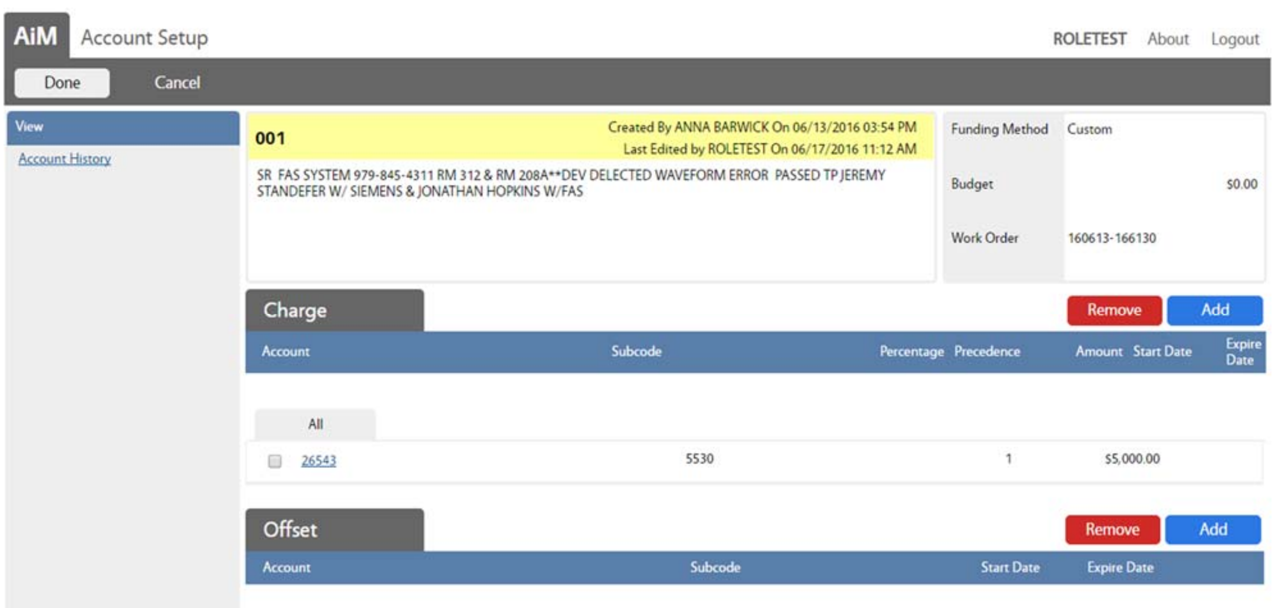
- The Extra Description contains all of the informaton that the customer submitted through the AggieWorks website.

**Property is not editable. If the building is incorrect, see instructions further in packet.

Funding Method and Account Setup

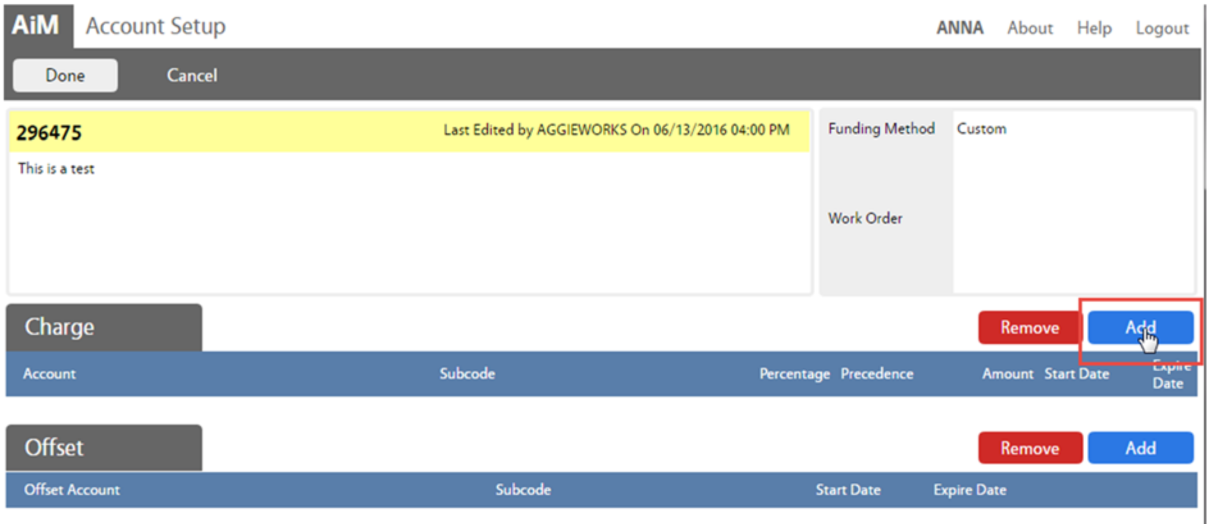


- (On The Phase) Funding method on Maintenance work orders should be as follows
  - SR, CM, and EV – Work Order
  - PPM and ST – SHOP
- Work Order requires an account to be setup at the Work Order level. By default, maintenance work on contract will be setup as the SSC Maintenance account with a limit of $5,506.17.
- To view the Account on the Phase, click Account Setup on the View menu



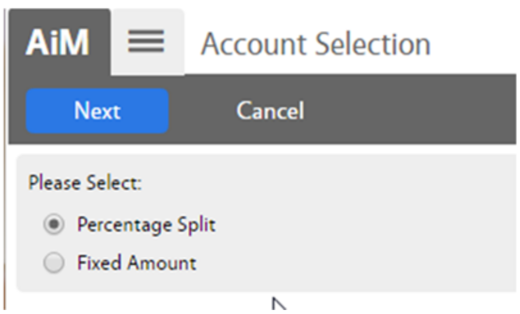
- The account screen has 2 sections.
- Charge is the account paying for the work. Offset will remain blank.
- 26543 is the SSC Maintenance account. This should not be here if the customer is funding the work.
- If work is billable, make sure the account is set correctly before beginning work and posting charges.

Add Account to Work Order



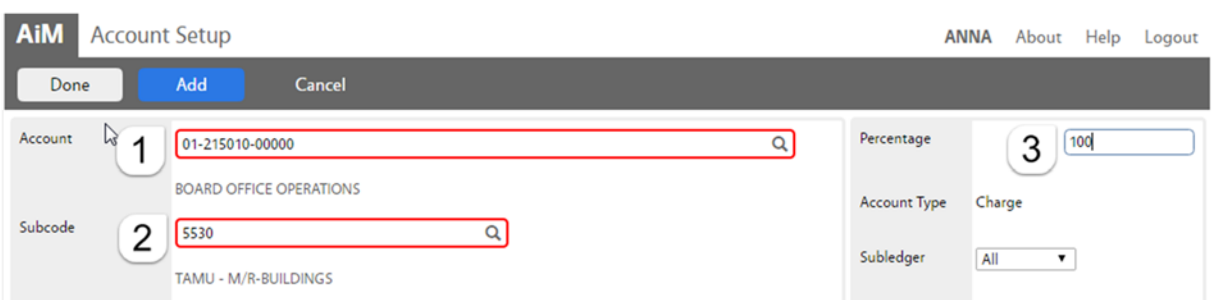
Click Add next to Charge

The Charge account is the one paying for the work. The Offset account is the one receiving the payment. Only the Charge account needs to be setup.



- Choose the type of account being entered
- Percentage Split – 1 or more accounts will equally split the charges. Percentages must equal 100%
- Fixed Amount – Account only to be used for a specific dollar amount
- Click Next

Percentage Split



1. *Account* - Enter the account number provided. Click the Magnify Glass at the end to validate.
   If the name of the account does not appear, then the account is not in AiM. Contact AggieWorks or Billing Coordinator.
2. *Subcode* - Enter the Subcode of 5530. Click the Magnify Glass
3. *Percentage* - Enter the percentage for this account.
4. If an additional account is needed, Click Add
5. Click Done to return to the previous screen.

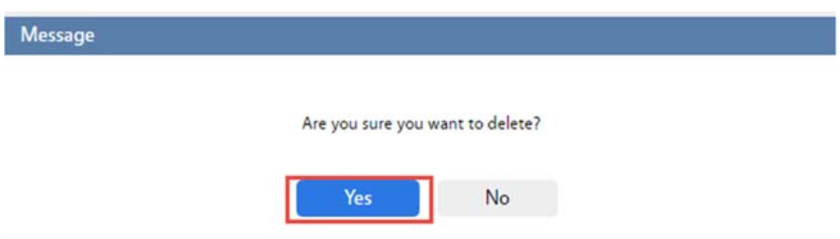
Fixed Amount

1. *Account* - Enter the account number provided. Click the Magnify Glass at the end to validate.

   If the name of the account does not appear, then the account is not in AiM.
2. *Subcode* - Enter the Subcode of 5530. Click the Magnify Glass
3. *Amount* – How much can be charged to this account.
4. *Precedence* – The order the accounts should be charged.
5. If an additional account is needed, click Add
6. Click Done to return to the previous screen.

To Remove account

1. Click the box in front of the account
2. Click Remove

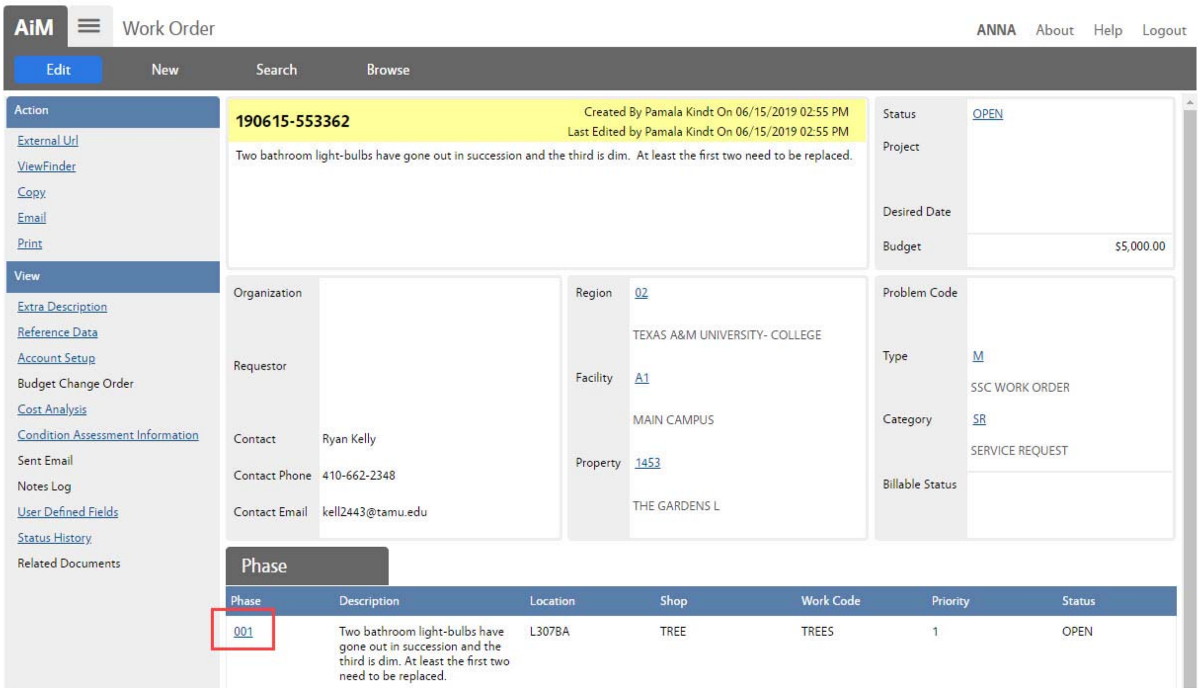


Confirm Yes

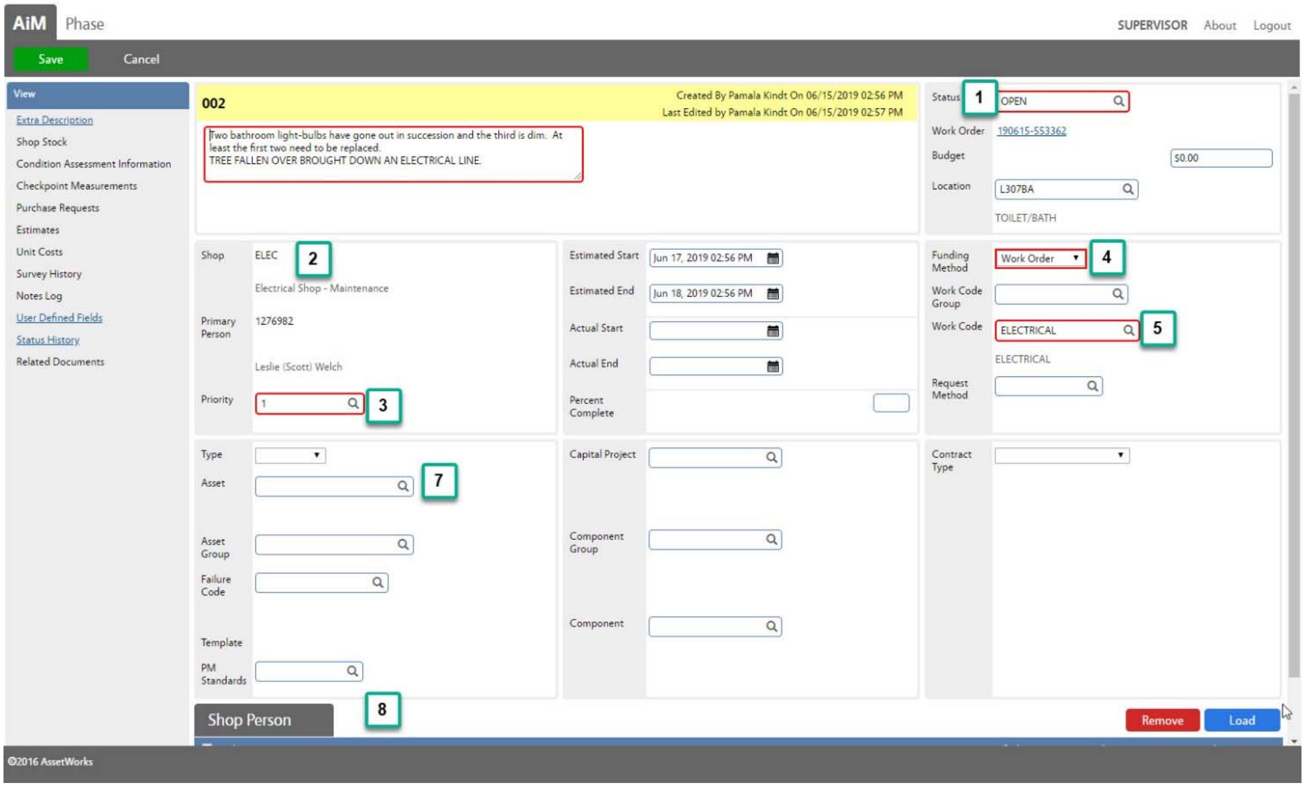
Click Done to return to the previous screen.

Accessing the Phase

Access the Phase information by clicking on the Phase number



Fields to check at the Phase Level

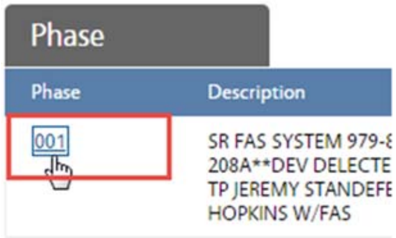


At the Phase level, the shop needs to check the following fields –

1. Status
2. Shop
3. Priority
4. Funding Method – *Account Setup at Work Order Level*
5. Work Code
6. Asset
7. Shop Person Assignment

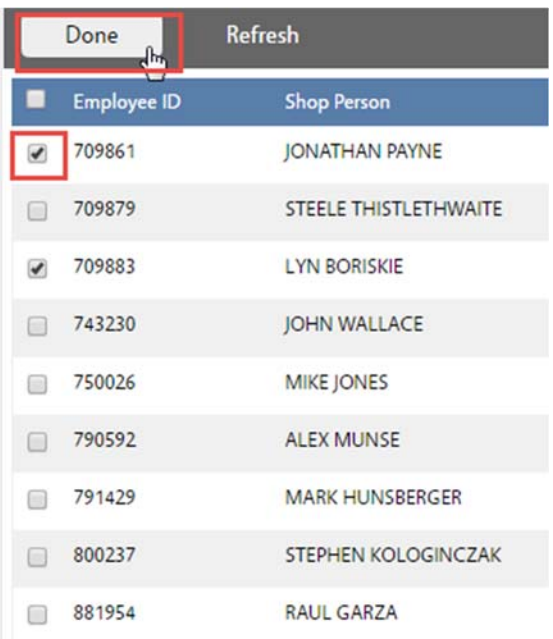
See Phase Screen Section Explanation on page 10 for detailed options. Changes to each of these fields can be made by clicking on the magnify glass and making a selection. Instructions for processes that take more than one step are below.

Assign a Technician



- Click on the Phase number

- Click the Load button



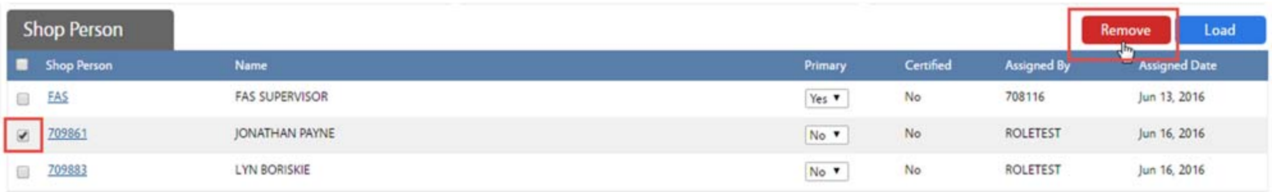
- Check the employees to add
  - o You can search for employees by typing CTRL-F on the keyboard
- Click Done on Navigation bar

- Mark one employee as Primary.

This is the person, besides the supervisor or maintenance coordinator, who can save the Phase in Complete.

- Click Done on the Navigation bar until you see the Save button.
- Click Save to update the record.

Remove a Technician



1. Check the name(s) to remove
2. Click the Remove button
3. Choose Yes on the confirmation message to remove the technician.
4. Click Done on the Navigation bar until you see the Save button.
5. Click Save to update the record.

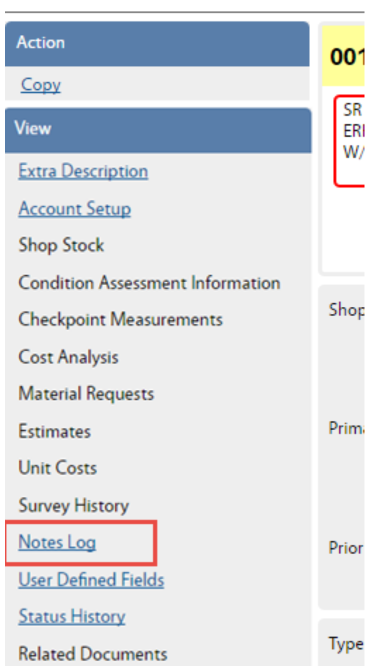
Additional View Menu Tasks

The following tasks will be completed during the work process. Some items will be entered through the Fire app by the technician.

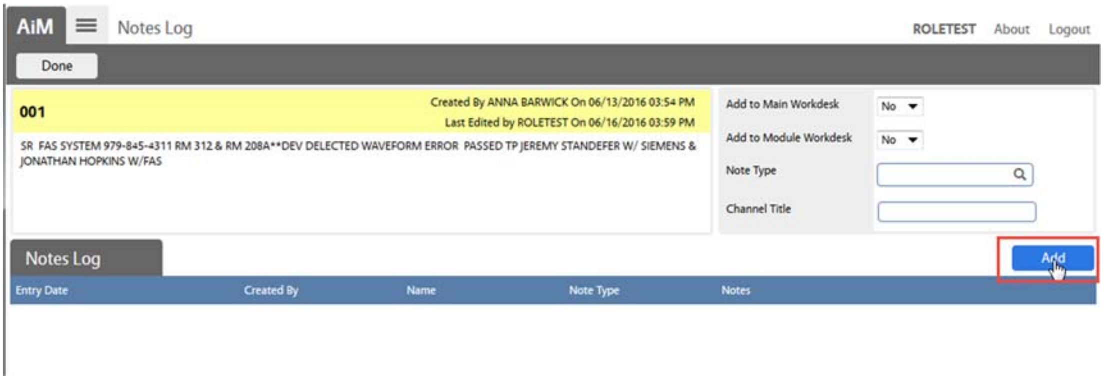
Tasks include –

- Adding and Reviewing Notes
- Adding Related Documents
- Entering the Estimate in the Cost Analysis

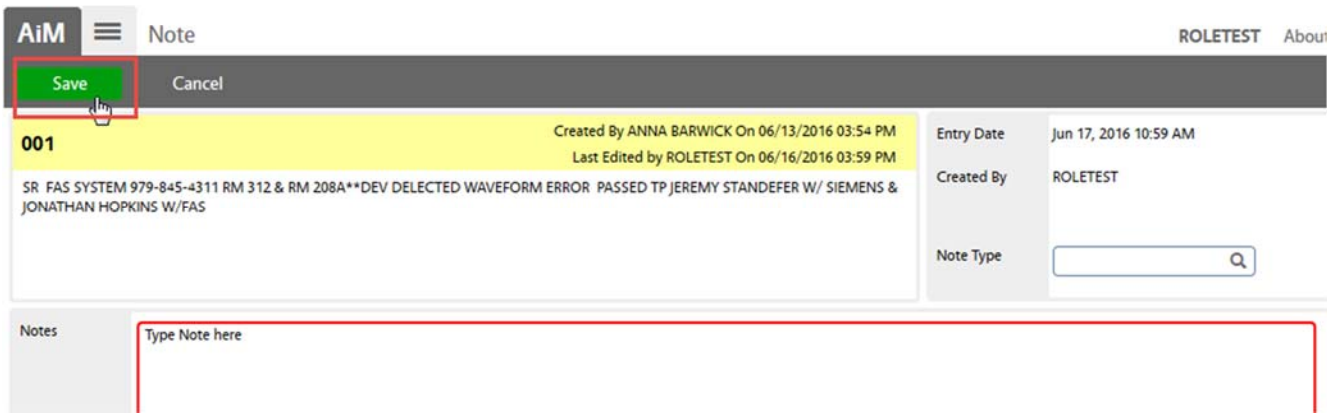
Add Notes



1. On the View Menu choose Notes Log



2. Click Add

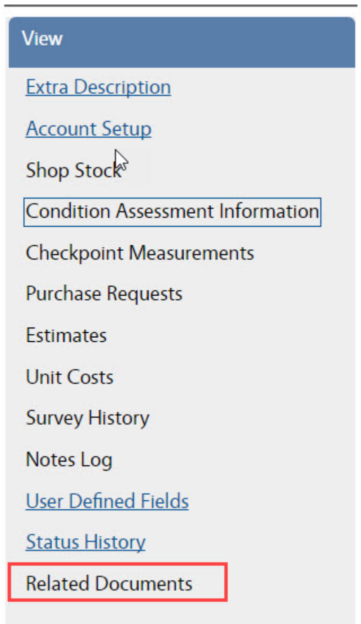


3. Type the Note. Text will not auto-capitalize.
4. Click Save

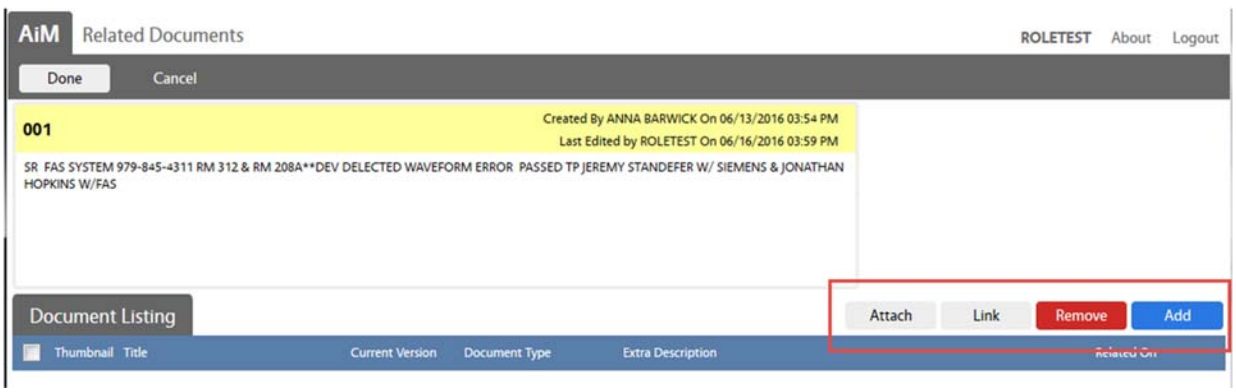
5. Click Done on the Navigation bar to return to the Phase
6. Click Save to finish edits

** Notes can be edited only by the person who created.

Add Related Documents

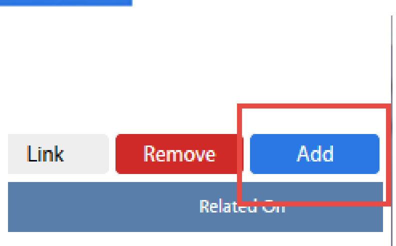


1. On the View Menu choose Related Documents

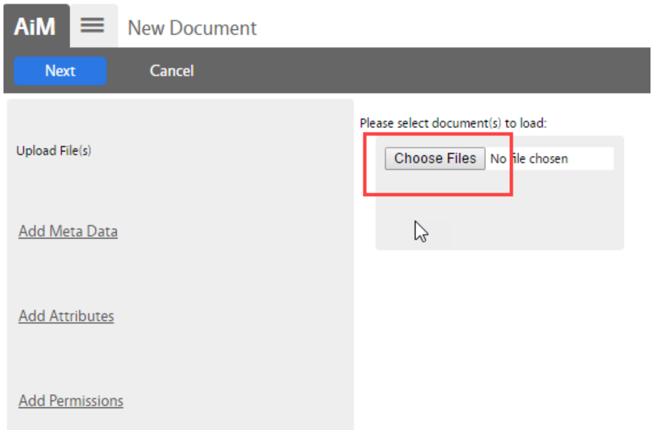


There are 4 options for attaching –

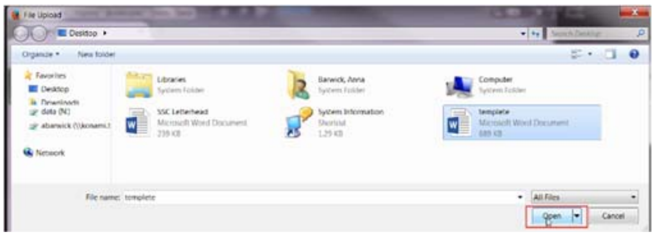
1. Attach – Add a document that has already been loaded into AiM. Ex: - Quote was attached to the Purchase Request already.
2. Link – Add a web address
3. Remove – Delete a document that is already attached to the Phase
4. Add – Upload a new document to attach to Phase



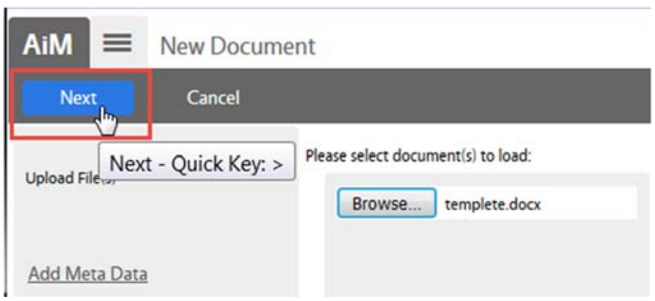
1. Click Add

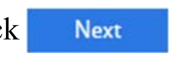


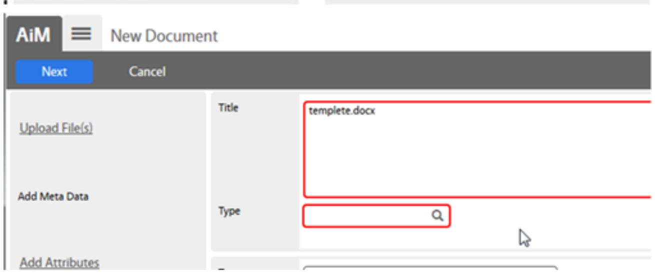
2. Click Choose Files



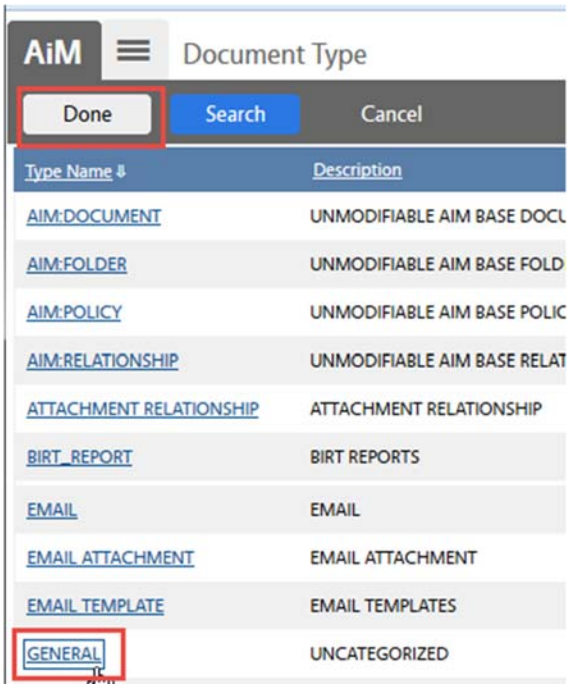
3. Select a file from the computer
4. Click Open



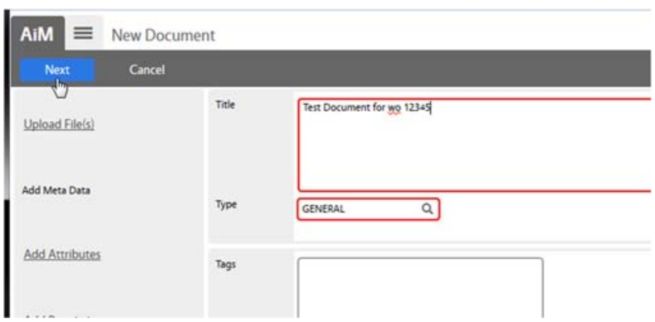
5. Click 



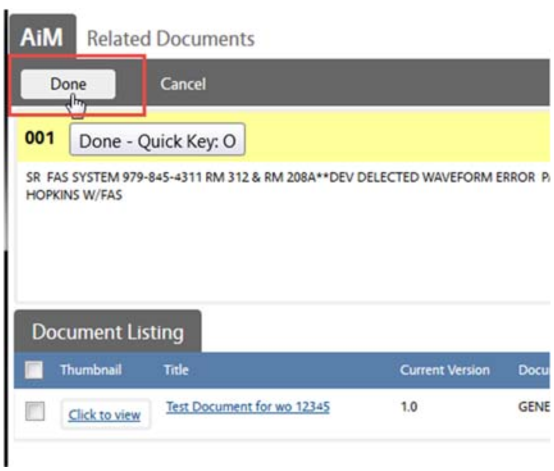
6. Review the title of the document. Adjust if needed. Make it descriptive of the document.
7. Click the magnify glass next to Type



8. Always choose General
9. Click Done on Navigation bar

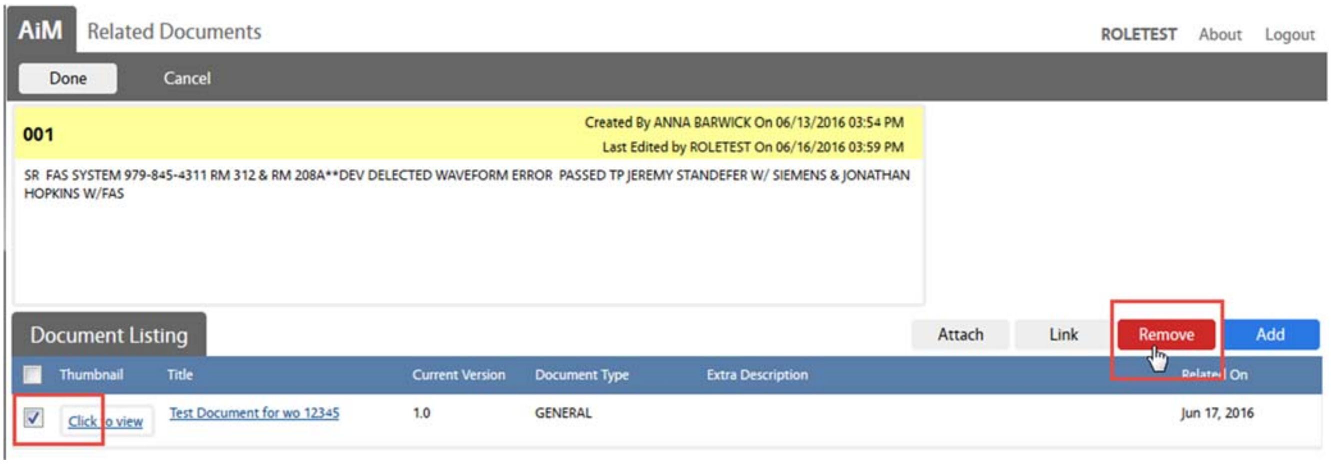


10. Click Next 3 times to return to the Related Documents screen

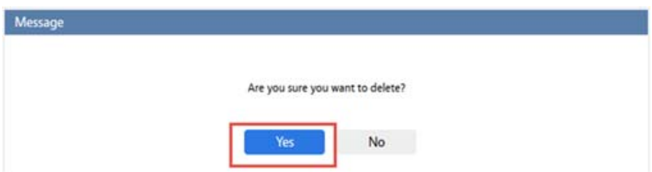


11. Click Done on Navigation bar

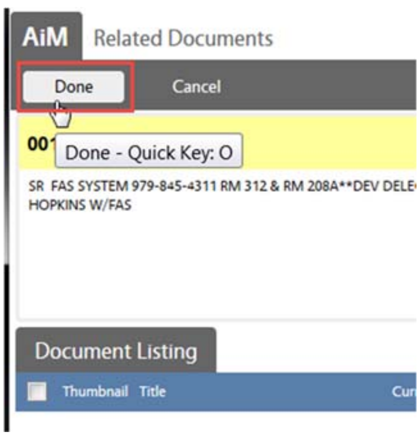
Remove Related Document



1. Check the box in front of the doument to remove
2. Click the Remove button

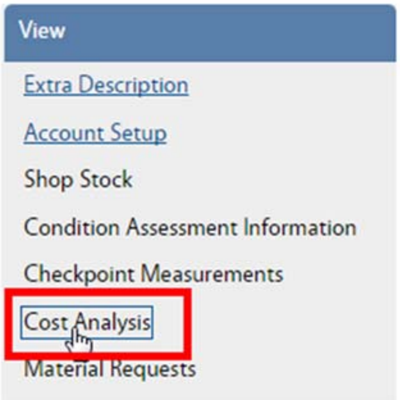


3. Click Yes to confirm removal



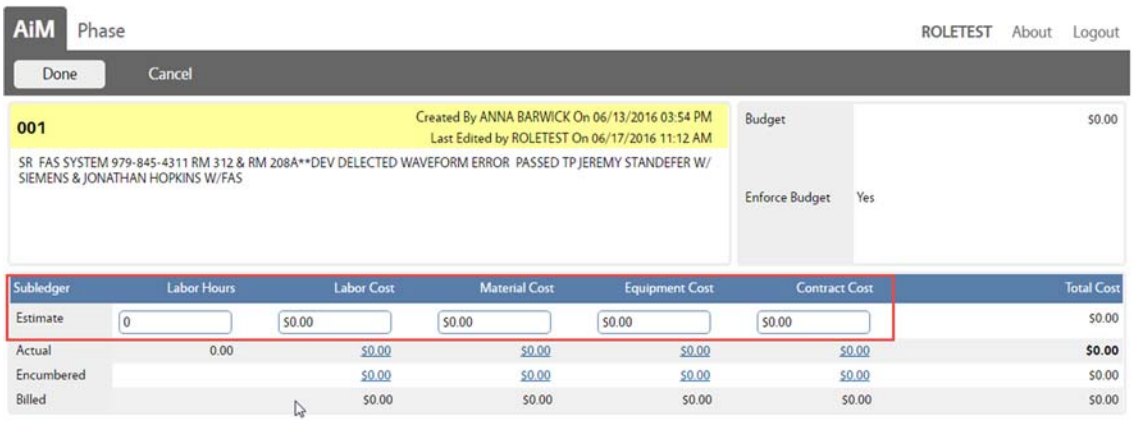
4. Click Done on Navigation bar to return to the Phase
5. Save Phase

Cost Analysis Estimate Entry



Once a cost estimate has been approved by a customer, the estimate can be entered onto the Phase. This allows the accuring cost to be compared to the Estimate amounts.

While in EDIT on the Phase, click Cost Analysis



There are 5 fields open on the Estimate line.

- Labor Hours - # of hours of work
- Labor Cost - $ amount for Labor
- Material Cost – Parts from inventory or purchased
- Equipment Cost – Equipment checked out through the Warehouse
- Contract Cost – Contractor labor

When first entered, the Total Cost will not update.

- Click Done to return to the Phase screen.
- Save the Phase.

- Once the Phase is saved, the Total Cost will update.