



Facilities Work Request System

User Guide

(for processes inside and outside of Maximo)

Overview

The **Facilities Management & Logistics (FM&L)** group uses **Work Requests** as the primary means to generate work orders for Corrective Maintenance (CM), improvements (MOD) and Capital Project (CP) work performed at Jefferson Lab facilities. Preventive Maintenance (PM) work is set up to automatically generate work orders at scheduled intervals. **Maximo** (an asset management life cycle and workflow process management system), along with **front-end web applications**, is used to create, manage, resolve, and report on these work requests. The goal of this document is to provide an overview of the processes available inside and outside of Maximo to accomplish this. The FM&L website <https://www.jlab.org/facilities/facilitieshome> has useful resources and fillable forms along with a "WORK REQUEST SYSTEM" button at the top that you can click on to access the Work Request selection website (see next page).



FACILITIES MANAGEMENT

- Engineering
- Operations & Maintenance
- Property
- Security
- Sustainability

WORK REQUEST SYSTEM

FM WEATHER PAGE

FACILITIES MANAGEMENT & LOGISTICS

Facilities Management & Logistics is responsible for performing or specifying performance of all Jefferson Lab facility maintenance, construction, security, property, and facility services.

The lab's 206-acre campus includes 169 acres owned by the U.S. Department of Energy and 37 acres owned by the Southeast Universities Research Association. In addition, the Commonwealth of Virginia owns an 5-acre parcel referred to as the Virginia Associated Research Campus (VARC) that the DOE leases for use in support of the lab.

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Additionally, the lab leases office and lab space (11,097 square feet) from the City of Newport News located in the Applied Research Center (ARC), which was constructed by the City of Newport News adjacent to the lab's campus.

Resources

- Subcontractor Forms
- Emergency Management
- Environment, Health & Safety
- Handy FM Links
- Key People to Contact
- Material Handling Equipment
- Master Site Plans
 - JLab Aerial Photo (2014)
 - JLab Land Use Plan (2016)
- US Postal Suites & Internal Mailstops
- Utility Outages
- Vehicle Motor & Equipment Procedures
- Vehicle Reservation Procedure
- Vehicle Inventory
- Weather Station
- Walking Trail Map
- Refuse and Recycling
 - Recycling (posted February 2017)
 - Paper Materials (print out)
 - Glass, Metal, Plastics (print out)
- Delivery and Receiving Route

Fillable Forms

- Blind Penetration Permit
- Digging/Excavation Permit
- Foreign National Information Sheet
- Generic Security Plan
- Hot Work Permit
- Key Request
- Lost Key Report
- Relocatable Structures Permit
- Subcontractor Registration
- After-Hours Guard Instructions

Create a Work Request Outside of Maximo

[Privacy and Security Notice](#)

Jefferson Lab **Facilities Management** Work Request System - Customer Connection

Welcome, sippel
 [Home](#)
 [My Work](#)
 [Subcontractor Work](#)
 [SRF Work](#)
 [Logout](#)

If this is an emergency, please call Security at x5822 or Facilities Management at x7400

For all non-emergency requests, please select one of the following choices, submit the appropriate information, and your request will be routed to the correct work group by Facilities Management.

Submit Work Request


Property Request
 Key Request

Your Open Created Work Orders

Wo Num	Date Reported	Status	Group	Description of Work
414670	4/8/19 3:13:33 PM	APPR	FMM	External AC at bldg 89 has blades exposed
414136	4/3/19 3:20:53 PM	APPR	FMM	Water leak coming from ceiling going into the vault
408445	3/28/19 9:11:27 AM	WSCHWO	FMO-S	Bay door won't close
399164	2/12/19 9:11:02 AM	FLDWRKCOMP	FMM	Data Center Room F112B A/C not cooling - same issue again
389845	12/18/18 11:22:44 AM	WMATL	FMM	Low LCW Supply Pressure alarm
366520	7/5/18 2:52:13 PM	APPR	FMO-S	Can hear water pouring inside the wall

Your Open Requests

Ticket ID	Date Reported	Status	Description of Work
70510	4/8/19 3:13:33 PM	WORKING	External AC at bldg 89 has blades exposed
70458	4/3/19 3:20:53 PM	WORKING	Water leak coming from ceiling going into the vault
70368	3/28/19 9:11:27 AM	WORKING	Bay door won't close
70145	3/15/19 1:10:43 PM	WORKING	Key Request Form: 83663
69646	2/12/19 9:11:02 AM	WORKING	Data Center Room F112B A/C not cooling - same issue again
69300	1/17/19 2:29:48 PM	WORKING	Portable heater needed for GTS control room
68993	12/18/18 11:22:44 AM	WORKING	Low LCW Supply Pressure alarm
66728	7/5/18 2:52:13 PM	WORKING	Can hear water pouring inside the wall

This website can also be accessed here: <https://misportal.jlab.org/work/index.jsf>. Select "Submit Work Request" for facilities maintenance related issues, "Property Request" to relocate/transfer/excess a property item, or "Key Request" for a new key. Your open requests and work orders are displayed at the bottom of the page.

Facilities Management & Logistics Website

FACILITIES MANAGEMENT

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Operations & Maintenance

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- Key Request
- Lost Key Report
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- Subcontractor Registration
- After-Hours Guard Instructions

Go back to the FM&L website - <https://www.jlab.org/facilities/facilitieshome>, then click on "Handy FM Links" (shown on next page). It provides more useful links separated into groups for specialized needs.

Access to Maximo from the Facilities Handy Links Website

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FACILITIES HANDY LINKS

The Lab

Staff Search	JLab Phonebook	All Staff Memos
SAD Calendar	Accelerator Schedule	Cafeteria Menu
Computer Center CCPR	Computer Center Services	Telecommunications
Insight / Timesheet	MIS Apps / Reqs	Business Services
Stockroom	ES&H Manual	EH&S Manual Forms
Training/JList	Admin Manual	Procurement
Atlis	Outage Management System	Safety Observations
JLab Drawings	Event Investigation Process	Snow Removal Plan

Facilities Management

<p>My Work Orders <small>(FM Staff Connection)</small></p> <p>Work Orders - Subcontractor Connection</p> <p>Basic Site Plan <small>(layers not supported in some browsers; use Adobe Reader or BlueBeam)</small></p>	<p>Facilities Information Center</p> <p>Facilities PMs, Projects' Milestones</p> <p>Upcoming PMs for Group <small>(select group, start/end dates to view upcoming PM release and due dates)</small></p>
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SOTRs

<p>Links for SOTRs <small>(subcontractor registration, training, and SOTR procedures)</small></p> <p>Expired Training <small>(choose contract(s))</small></p> <p>Subcontractor Report <small>(choose subcontractor(s) and active/inactive JList status)</small></p> <p>Course Report by Subcontractor <small>(choose subcontractor(s), contract(s), and/or skill(s))</small></p> <p>Individual Training Status Report <small>(choose name(s))</small></p>	<p>SOTR Report <small>(choose SOTR to list active subcontractors by contract)</small></p> <p>Project Report <small>(choose project(s))</small></p> <p>Subcontractor Badge Status Report <small>(choose contract(s))</small></p> <p>Subcontractor Training Taken or Required <small>(choose subcontractor(s) and/or contract(s))</small></p> <p>Foreign National Contractors Report <small>(click on a link)</small></p>
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From this website, you can click on the “**My Work Orders**” link. Unless you have already logged into Maximo, you will be prompted to enter your Maximo user name and password before Maximo will display the **Start Center** page.

Maximo Start Center



Welcome, Linda

Work Group

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

FM - Admin FACILITIES MANAGEMENT

Change Content/Layout Display Settings Create New Template Modify Existing Template Update Start Center

Favorite Applications

- Service Requests
- Work Order Tracking

Pending Service Requests

Affected User	Owner Group	Reported Date	Service Request	Status	Summary	Target Finish
Tina Menefee	FMENG	4/4/19 2:31 PM	70471	PENDING	3 swing gates needed for fixed ESR 1 ladders	4/18/19 12:00 AM
Tina Menefee	FM	3/18/19 3:43 PM	70170	PENDING	Relocate eyewash	3/22/19 12:00 AM
Tina Menefee	FMENG	3/22/19 12:13 PM	70257	PENDING	No room identification on the FM maps or the actual door for the ARC Elevator room	4/19/19 12:00 AM

[Set Chart Options](#) 1 - 3 of 3

KPI List

Last Run: 4/9/19 3:07 PM [Update](#)

Status	KPI	Actual	Target	Variance
↓	Pending FM Requests	20	100	-80
↓	Open FM Requests	662	200	462

My Service Requests - accepted by me

Owner Group	Service Request	Status	Summary	Supervisor	Target Finish
FMM	64197	WORKING	Supplemental Heater Needed	360801	12/31/18 12:00 AM

[Set Chart Options](#) 1 - 1 of 1

My Workorders - Either lead or owner

Description	Lead	Service Request	Status	Target Finish	Vendor	Work Group	Work Order
Training Hours for Facilities Management Staff FY'19	Bob Sperlazza		APPR	9/30/19 12:00 AM		FMO	379091
Non-Project specific Project Meetings and Events FY'19	Bob Sperlazza		APPR	9/30/19 12:00 AM		FMO	379092

[Set Chart Options](#) 1 - 2 of 2

The Maximo Start Center will automatically load the Work Requests – known as **Service Requests** in Maximo - for your **work group**.

View the **“Pending Service Requests”** section at the top of the page and click on a row to access the service request details as shown on the next page.

You can exit out of Maximo at any time by clicking on the **“Sign Out”** link in the top right corner of the dark blue bar, which is always visible in every Maximo application.

Accept Service Request and Create Work Order



Service Requests | Bulletin: (0) | Go To | Reports | Start Center | Profile | Sign Out | Help

Query | Find Service Request | Select Action

List View | Service Request | Log | Specifications | Reasons Tab | Service Address | Map

PRINTING: Please disable any pop-up blockers. You WILL NOT be able to print reports if pop-ups are being blocked.

To print, use paper icon for the type of printout you want in light blue toolbar. Once new window/tab opens with print version of report, press the print icon in the light blue toolbar again. You will see a box asking for the print format. Select pdf or report will not output correctly. Once pdf version opens, either follow dialog or press the print icon in the pdf toolbar.

Service Request: 70505 | Owner/Supervisor: | Owner Group: FMM | Status: **PENDING** | Attachments

Address Information

Service Address: | Formatted Address: | Street Address: | City: | State/Province: |

User Information

Reported By: 28425 | Name: Carroll Jones | Phone: 7672 | E-mail: jonesc@lab.org

Affected Person: 28425 | Name: Carroll Jones | Phone: 7672 | E-mail: jonesc@lab.org

Service Request Details

Summary: Replace Hall C Honeywell XL 100CU Controller

Configuration Item: | Target Description: |

Details: REPLACE HALL C HONEYWELL XL 100CU CONTROLLER - SEE QUOTE FOR CONTROLLER # 954-0329019dr (\$2882.05)

- EH&S Considerations -
- Minimum Access Training Requirements: Rad Worker 1, ODH 1
- Other Requirements or Special Conditions: Lock & Tag System(s) [Controls electrical power is 24 volts]
- Other EH&S requirements: Work must be completed during upcoming Accelerator Maintenance Period to access controller
- Project: FMOMG
- Org: FMM

Classification: FM \ FMI \ MECH \ HVAC \ HVACR | Description: Mechanical : HVAC : Repair/Maintenance | Reported Priority: 1 | Low | Internal Priority: 1 | Create WO Options: CHILD | Asset: | Location: 96 | Experimental Hall C

Related Work Orders: Filter | 0 - 0 of 0

Wo Num	Status	Total Cost
There are no rows to display.		

Before the service request is accepted, its status is set to **"Pending"**.

Click on the **"Route Workflow"** process at the top in the light blue bar to accept the service request and create a work order. The service request status will change from **"Pending"** to **"Working"**, its information will be copied to the work order upon creation, and you will become the owner of both. The next page shows how to access the created **work order** from the service request.

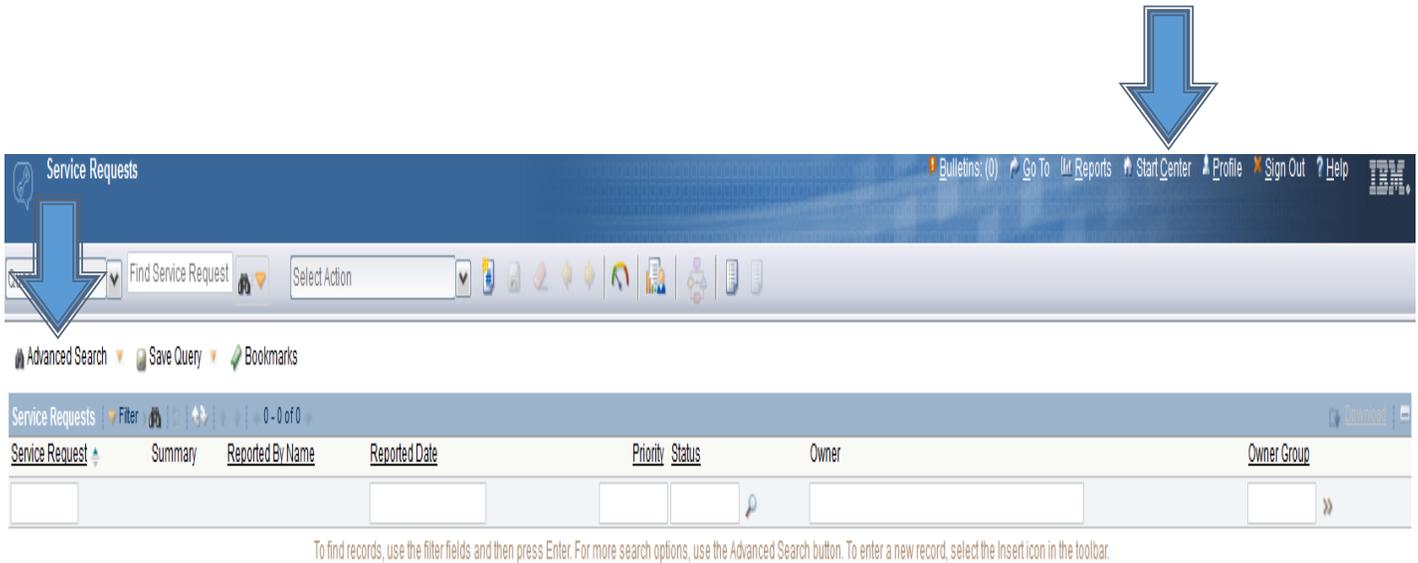
Access a Work Order from a Service Request

The screenshot displays the 'Service Requests' web application interface. At the top, the status is 'Service Request 68524' with 'Owner/Supervisor' and 'Owner Group FME'. The status is set to 'WORKING', highlighted by a blue arrow. Below this, there are sections for 'Address Information', 'User Information', and 'Service Request Details'. The 'Service Request Details' section includes a summary, configuration item, target description, and classification. A 'Related Work Orders' table is visible at the bottom right, showing a work order with number '398636', status 'WMATL', and total cost '1,081.40'. A blue arrow points to the 'Go To' button next to the work order number, which has a dropdown menu with options: 'Work Order Tracking', 'Work Order Tracking - SRF', and 'Work Order Tracking orig'.

Wo Num	Status	Total Cost
398636	WMATL	1,081.40

Now that the service request has been accepted and its status set to "Working", you can click on the **double right arrows** beside the **Work Order #** in the lower right to access the work order.

Search for a Service Request



The screenshot displays the 'Service Requests' search interface. At the top, a dark blue navigation bar contains links for 'Bullets: (0)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. A large blue arrow points to the 'Service Requests' link on the left side of this bar. Below the navigation bar is a search bar with the text 'Find Service Request' and a 'Select Action' dropdown menu. To the right of the search bar are several icons for search and navigation. Below the search bar are three buttons: 'Advanced Search', 'Save Query', and 'Bookmarks'. The main content area features a table with the following columns: 'Service Request', 'Summary', 'Reported By Name', 'Reported Date', 'Priority', 'Status', 'Owner', and 'Owner Group'. A 'Download' link is located on the right side of the table. Below the table, a note reads: '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.'

Click on "**Start Center**" at the top right in the dark blue bar. Then click on the "**Service Requests**" link on the left side. The Service Request search screen will be displayed as shown above. Type in key word(s) in any of the blank fields and press "**Enter**" or click on "**Advanced Search**" and type in key word(s) in the blank fields, click on the **double right arrows** to select values, and/or select key word(s) using the **magnifying glass symbols**. Then click on the "**Find**" button.

The resulting search list will display how many items were found and let you see 20 items per page by clicking on the **left and right arrows** in the medium blue bar. You can also download the list to an excel file for easier searching by clicking on the "**Download**" link on the right side of the medium bar.

Sort the list by clicking on any of the **underlined field headings**. Hover over a service request number to see an underline appear under it. Click on it to access the service request contents.

Add Information to a Work Order Outside of Maximo



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WORK REQUEST SYSTEM

FM WEATHER PAGE

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Fillable Forms

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Go back to <https://www.jlab.org/facilities/handylinks>, then click on the **“WORK REQUEST SYSTEM”** button at the top of the page. This will allow you to easily see your open work orders without having to log into Maximo and search for them. See the following pages for details.

Access Your Work Requests Outside of Maximo

[Privacy and Security Notice](#)



Welcome, sippel

[Home](#)

[My Work](#)

[Subcontractor Work](#)

[SRF Work](#)

[Logout](#)

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[Submit Work Request](#)

[Property Request](#)

[Key Request](#)

Your Open Created Work Orders

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414121	4/3/19 12:14:25 PM	APPR	FMO-P	Water pouring through light fixture onto electrical equipment
408445	3/28/19 9:11:27 AM	WSCHWO	FMO-S	Bay door won't close
399164	2/12/19 9:11:02 AM	FLDWRKCOMP	FMM	Data Center Room F112B A/C not cooling - same issue again
389845	12/18/18 11:22:44 AM	WMATL	FMM	Low LCW Supply Pressure alarm
366520	7/5/18 2:52:13 PM	APPR	FMO-S	Can hear water pouring inside the wall

Your Open Requests

Ticket ID	Date Reported	Status	Description of Work
70458	4/3/19 3:20:53 PM	WORKING	Water leak coming from ceiling going into the vault
70451	4/3/19 12:14:25 PM	WORKING	Water pouring through light fixture onto electrical equipment
70368	3/28/19 9:11:27 AM	WORKING	Bay door won't close
70145	3/15/19 1:10:43 PM	WORKING	Key Request Form: 83663
69646	2/12/19 9:11:02 AM	WORKING	Data Center Room F112B A/C not cooling - same issue again
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68993	12/18/18 11:22:44 AM	WORKING	Low LCW Supply Pressure alarm
66728	7/5/18 2:52:13 PM	WORKING	Can hear water pouring inside the wall

Click on the **"My Work"** link at the top of the page to list your open work orders (see next page).

List Your Open Work Orders Outside of Maximo

[Privacy and Security Notice](#)

Jefferson Lab

Work Request System - FM Staff Connection

Facilities & Logistics

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[SRF Work](#)

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Open JLab Work Orders

Filter

Lead Group Subcontractor [Filter](#)

Specific open work order(s): Enter work order #'s separated by either spaces or comma's (wildcards accepted)

[View all open workorders where I am the lead or owner](#)

[View all open workorders where I am the lead, owner, supervisor, laborer, or in the assigned group](#)

Problems with this application?

Please contact: mis-webapps@jlab.org

Click on one of the four options in the "Filter" box to list work order(s):

1. Specify Lead name, Work Group name, and/or Subcontractor name
2. Type in specific open work orders separated by spaces or commas
3. Click on the link to "View all open workorders where I am the lead or owner"
4. Click on the link to "View all open workorders where I am the lead, owner, supervisor, laborer, or in the assigned group"

Select a Work Order Outside of Maximo

[Privacy and Security Notice](#)

Welcome, sippel [Home](#) [My Work](#) [Subcontractor Work](#) [SRF Work](#) [Logout](#)

Open JLab Work Orders

Filter

Lead Group Subcontractor [Filter](#)

Specific open work order(s): Enter work order #'s separated by either spaces or comma's (wildcards accepted)

[View all open workorders where I am the lead or owner](#)

[View all open workorders where I am the lead, owner, supervisor, laborer, or in the assigned group](#)

- If a material/service cost is entered, a material/service description is required.
- If a labor cost is entered, # of hrs and description of labor description is required.
- Remember to "Save" your input before searching for other work orders.
- **You can enter data for multiple work orders before having to click Save.**

[Save](#)

Work Order No.	Task Order No.	Description	Group	Lead	Owner	Date Reported	Location	Asset	
▶ 167573		CEBAF Renovation and Expansion (CRE)	FMENG	Christine Snetter	Christine Snetter	2015-07-29	CEBAF Center (12)		 
▶ 178487		Penetration Leak Repair	FMENG	Ed Winslow	Ed Winslow	2015-11-19	Accelerator Tunnel (999)		 

[Save](#)

Problems with this application?
 Please contact: mis-webapps@jlab.org

Click on a **work order number** from the list to view its contents. At the end of each row you have the option to **print out** the work order details (click on the printer symbol) or **view/upload attachments** (click on the paper clip symbol).

View/Update Work Order Outside of Maximo

Save

Work Order No.	Task Order No.	Description	Group	Lead	Owner	Date Reported	Location	Asset
▶ 167573	0	CEBAF Renovation and Expansion (CRE)	FMENG	Christine Snetter	Christine Snetter	2015-07-29	CEBAF Center (12)	
▼ 178487	0	Penetration Leak Repair	FMENG	Ed Winslow	Ed Winslow	2015-11-19	Accelerator Tunnel (999)	

Work Order #178487

Internal No.		Actual Costs		Cost Entry	
Internal No.	178487	Material/Service		Material/Service	
Task Order No.	0	Material/Service Cost		Material/Service Cost	
Status	APPR	Material/Service Description		Material/Service Description	
Category	Structural	\$96.59	Water heater stand for test project	Material/Service Vendor	
Job Type	Repair/Maintenance	\$23.43	Caulk gun and pea pebbles (needed for tunnel penetration leak repair)	Purchase Card Type	
Description of Work	Penetration Leak Repair	\$579.20	seal boss R70 and associated materials (needed for tunnel penetration leak repair)	Labor	
Long Description	Parent work order to repair leaking penetrations at stations 26+91, 25+96 (both wave guide) and 7+56 that just needs to be re injected. - Schedule Considerations - - Explanation: Complex project. Design over the winter with execution in summer '16 SAD - EH&S Considerations - - Minimum Access Training Requirements: Rad Worker 1, ODH 1, ODH 2 - Other Requirements or Special Conditions: Work >6 Ft above ground	\$9.75	30QT tote (needed for tunnel penetration leak repair)	Craft STANDARD	
Date Reported	2015-11-19	\$180.64	epoxy (3 gal kit)	Regular Hours	
Target Finish Date	2019-08-30	\$58.20	bulkhead union and tube adapter	Labor Description	
Priority	1	\$169.99	Paint sprayer for Winslow experiment	Email Customer?	
Location	Accelerator Tunnel (999)	\$912.55	epoxy - 3 gal kit (qty of 15)	Labor Date	
Work Type	Capital Project	Material/Service Total: \$2,030.35		Needs To Be Reassigned?	
Group	FMENG	Labor		Field Work Complete?	
Lead	Ed Winslow	Labor Cost		Date Complete	
Owner	Ed Winslow	\$216.28	WINSLOW	2016-02-11	GENERAL
Type Refrigerant Used?		\$5,407.00	MEIER	2016-06-06	GENERAL
Lbs Refrigerant Added?		\$2,703.50	WINSLOW	2017-07-03	GENERAL
Lbs Refrigerant Recovered?		Labor Total: \$8,326.78		Work Order Total: \$10,357.13	
On Behalf Of	Ed Winslow				
On Behalf Of Phone	7316				

Save

Problems with this application?
Please contact: miis-webapps@lab.org

The left side of the page under the **"Work Order #"** contains the work order details. For relevant work orders, **refrigerant information** can be added at the bottom left side.

You can add materials and/or labor information in the **"Cost Entry"** area on the right side of the page in either the **"Materials/Service"** box or the **"Labor"** box.

Also in the Labor box, you can check the **"Needs To Be Reassigned?"** box or the **"Field Work Complete?"** box, or fill in the **"Date Complete"** calendar.

Press **"Save"** at the top or bottom left side buttons and the cost entry data just entered will show up in the **"Actual Costs"** area in the middle of the page in the Material/Service and/or the Labor section(s). Each section has a subtotal and at the bottom is the **Work Order Total**.

Add Information to a Work Order in Maximo

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FACILITIES HANDY LINKS

The Lab

Staff Search	JLab Phonebook	All Staff Memos
SAD Calendar	Accelerator Schedule	Cafeteria Menu
Computer Center CCPR	Computer Center Services	Telecommunications
Insight / Timesheet	MIS Apps / Reqs	Business Services
Stockroom	ES&H Manual	EH&S Manual Forms
Training/JList	Admin Manual	Procurement
Atlas	Outage Management System	Safety Observations
JLab Drawings	Event Investigation Process	Snow Removal Plan

Facilities Management

My Work Orders (FM Staff Connection)		Facilities Information Center
Work Orders - Subcontractor Connection		Facilities PMs, Projects' Milestones
Basic Site Plan (layers not supported in some browsers; use Adobe Reader or BlueBeam)		Upcoming PMs for Group (select group, start/end dates to view upcoming PM release and due dates)

SOTRs

Links for SOTRs (subcontractor registration, training, and SOTR procedures)	SOTR Report (choose SOTR to list active subcontractors by contract)
Expired Training (choose contract(s))	Project Report (choose project(s))
Subcontractor Report (choose subcontractor(s) and active/inactive JList status)	Subcontractor Badge Status Report (choose contract(s))
Course Report by Subcontractor (choose subcontractor(s), contract(s), and/or skill(s))	Subcontractor Training Taken or Required (choose subcontractor(s) and/or contract(s))
Individual Training Status Report (choose name(s))	Foreign National Contractors Report (click on a link)

Go back to <https://www.jlab.org/facilities/handylinks>, then click on the “**My Work Orders**” link. If not already logged in, you will then be prompted to enter your **Maximo username and password**.

Access Work Orders in Maximo

FM - Admin FACILITIES MANAGEMENT

Change Content/Layout Display Settings Create New Template Modify Existing Template Update Start Center

Favorite Applications

- Service Requests
- Work Order Tracking
- KPI List



Pending Service Requests

Affected User	Owner Group	Reported Date	Service Request	Status	Summary	Target Finish
<input type="text"/>	<input type="text"/>					
Tina Menefee	FMENG	4/4/19 2:31 PM	70471	PENDING	3 swing gates needed for fixed ESR 1 ladders	4/18/19 12:00 AM
Tina Menefee	FM	3/18/19 3:43 PM	70170	PENDING	Relocate eyewash	3/22/19 12:00 AM
Tina Menefee	FMENG	3/22/19 12:13 PM	70257	PENDING	No room identification on the FM maps or the actual door for the ARC Elevator room	4/19/19 12:00 AM

[Set Chart Options](#) 1 - 3 of 3

My Service Requests - accepted by me

Owner Group	Service Request	Status	Summary	Supervisor	Target Finish
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
FMM	64197	WORKING	Supplemental Heater Needed	360801	12/31/18 12:00 AM

[Set Chart Options](#) 1 - 1 of 1

My Workorders - Either lead or owner

Description	Lead	Service Request	Status	Target Finish	Vendor	Work Group	Work Order
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Training Hours for Facilities Management Staff FY19	Bob Sperlazza		APPR	9/30/19 12:00 AM		FMO	379091
Non-Project specific Project Meetings and Events FY19	Bob Sperlazza		APPR	9/30/19 12:00 AM		FMO	379092

[Set Chart Options](#) 1 - 2 of 2

The **Maximo Start Center** will automatically load the **Service Requests** for your work group. Select the “**Work Order Tracking**” link on the left. The Work Order search screen will be displayed as shown on the next page.

Entering the Work Order # in Maximo

The screenshot shows the Maximo Work Order Tracking interface. At the top, there is a navigation bar with 'Work Order Tracking' and various utility links like 'Bulletins: (0)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a search bar with 'Find Work Order' and a 'Select Action' dropdown. A secondary bar contains 'Advanced Search', 'Save Query', and 'Bookmarks'. The main area features a table with columns: 'Work Order', 'SR #', 'Description', 'Location', 'Priority', 'Work Group', 'Work Type', 'Owner', 'Lead', 'WO Status', 'Target Finish', and 'SR Status'. The 'Work Order' cell in the first row is highlighted with a blue border, and a large blue arrow points upwards towards it.

Work Order	SR #	Description	Location	Priority	Work Group	Work Type	Owner	Lead	WO Status	Target Finish	SR Status

In the box marked “**Work Order**” – type in the specific work order number you would like to add your work order information to. You can also type in any of the other blank fields or click on the “**Advanced Search**” link to specify search criteria.

Press “**Enter**” to see the **work order search results listings** displayed as shown on the following page.

Selecting the Work Order # in Maximo

Work Order Tracking

Bulletins: (0) Go To Reports Start Center Profile Sign Out Help

Query Find Work Order Select Action

Advanced Search Save Query Bookmarks

Work Orders Filter 1 - 1 of 1 Download

Work Order	SR#	Description	Location	Priority	Work Group	Work Type	Owner	Lead	WO Status	Target Finish	SR Status
178487											
178487	53266	Penetration Leak Repair	999	1	FMENG	CP	Ed Winslow	Ed Winslow	APPR	8/30/19 9:40 AM	WORKING

Click on the **work order number** to open the work order. A **“Work Order”** tab with work order details will be displayed along with other tabs at the top available for additional information to be entered as shown on the following pages.

Click on **“List View”** to exit the work order and display the work order search results listings again.

"Work Order" Tab in Maximo

Work Order Tracking

Query: Find Work Order | Select Action

Work Order | Plans | Actuals | Log | Reasons | Assignments | Service Address | Map

Please either check the lead or vendor to assign this workorder to. Be sure to hit the save button in the menu bar after making edits.

PRINT - pop-up blockers. You WILL NOT be able to print reports if pop-ups are being blocked.

To print, use the printer icon in the light blue toolbar. Once new window/tab opens with print version of report, press the print icon in the light blue toolbar again. You will see a dialog for the print format. Select pdf or report will not output correctly. Once pdf version opens, either follow dialog or press the print icon in the pdf toolbar.

Workorder Information

Work Order: 178487 | Penetration Leak Repair

Location: 999 | Accelerator Tunnel

Asset: |

Parent WO: |

Classification: FM \ FMI \ ARCHIT \ STRUC \ STRUCR

Class Description: Repair/Maintenance

Details: Parent work order to repair leaking penetrations at stations 26+91, 25+96 (both wave guide) and 7+56 that just needs to be reinstalled.

- Schedule Considerations -
- Explanation: Complex project. Design over the winter with execution in summer '16 SAD

- EH&S Considerations -
- Minimum Access Training Requirements: Rad Worker 1, ODH 1, ODH 2
- Other Requirements or Special Conditions: Work > 6 FT above ground

Reported By: Ed Winslow

Reported By Location: 28_179-2

Reported Date: 11/19/15 10:54 AM

On Behalf Of: Ed Winslow

Phone: 7316

On Behalf Of Location: 28_179-2

Priority

Asset/Location Priority: |

Priority: 1 | Low

Priority Justification: |

Risk Assessment: |

General Information

Attachments

WO Status: APPR

Status Date: 11/19/15 10:59 AM

Work Type: CP

Class: WORKORDEF

Originating Record: 53266

Orig Record Type: SR

SR Status: WORKING

Work Group: FMENG

Owner: 11753 | Ed Winslow

Lead: 11753 | Ed Winslow

Vendor: |

Need Reassign?:

Subcontractor Information

Task Order: |

Estimate Required: |

Payment Basis: |

Refrigerant Added Amt: |

Refrigerant Type: |

Refrigerant Recovered Amt: |

Estimated Cost: |

Contract: |

Craft: |

Safety Checklist

Complete safety checklist

Review completed safety checklist

The **"Work Order"** tab provides most of the information needed to identify the work being done and who is working on it, including the title, description, location, status, work type, work group, owner, and lead. At the bottom is a summary of PO and PR line items and totals from the **"Actuals"** tab.

The other tabs we use are: **Plans, Actuals, and Log**. Click on **"Plans"** to add child work orders if this work order is a parent project (CP) work order. Click on **"Actuals"** to add the PO and PR line items, labor hours, and/or materials costs. Click on **"Log"** to add log entries describing the work performed, issues, delays, etc. See the following pages for further details on these tabs.

"Plans" Tab in Maximo

The screenshot displays the 'Plans' tab in the Maximo Work Order Tracking interface. At the top, the 'Plans' tab is selected in the navigation bar. Below this, the parent work order details are shown: Work Order 374235, Site JLABSTE1, and Status APPR. The main section is titled 'Children of Work Order 374235' and contains a table with the following data:

Sequence	Record	Record Class	Summary	Lead	Display Name	Location	Asset	Status
	399625	WORKORDER	89 Renovation (A/E Design)	19423	Christine Snetter	89		APPR
	399626	WORKORDER	89 Renovation (CM A/E)	313271	Thomas Renzo	89		APPR
	399627	WORKORDER	89 Renovation (Construction)	313271	Thomas Renzo	89		WAPPR

Below the table, there are buttons for 'Select Assets', 'Select Locations', 'Select Work Orders', and 'New Row'. The 'New Row' button is highlighted with a blue arrow. Below this is the 'Tasks for Work Order 374235' section, which is currently empty with the message 'There are no rows to display.' Below that is the 'Labor' section, also empty with the message 'There are no rows to display.' At the bottom right, there are buttons for 'Select Crew Type', 'Select Craft', and 'New Row'. A blue arrow points to the 'New Row' button in this section. The top bar contains a 'Save' icon (a floppy disk) which is also highlighted with a blue arrow.

The **"Plans"** tab allows you to create **child work orders** linked to the current work order (parent) by clicking on the **"New Row"** button at the bottom right side of this section. As you create the child work order(s), click on the **"Save"** symbol  at the top in the light blue bar.

Click on the **double right arrows to the right of each child work order #** to open them. Child work orders can have the following work types: CMGT (Construction Management), CONST (Construction), DSGN (Design), SOW (Scope of Work), and STDY (Study). Be sure to set the work group and child work order owner and lead as well. Press the **"Return"** button at the top right corner to return to the parent work order.

"Actuals" Tab in Maximo

Work Order Tracking

Work Order: 178487 Penetration Leak Repair Site: JLABSTE1 Status: APPR

Purchase Orders (1 - 4 of 4)

Item	Description	Line Cost	Required Date	Order Date	PO	Company	Status
	PROVIDE LABOR AND EQUIPMENT TO	975.00		7/5/17	14A0505409-0	DGSPAI	APPR
	BASIC ORDERING AGREEMENT FOR	2,000.00		11/15/18	19-M0199-0	DGSPAI	APPR
	FABRICATE MOCK UP FOR	6,768.00		11/16/18	13A0753355-0	SHOREL	APPR
	PROVIDE LABOR, GROUT PUMP AND	300.00		4/19/16	14A0505322-0	DGSPAI	APPR
PO Total		10,043.00					

Purchase Requisitions (1 - 5 of 8)

Item	Description	Line Cost	Required Date	PO	PR	Company	Status
-		300.00		14A0505322-0	362862		D
-		975.00		14A0505409-0	370985		D
-		320.00		CC-376036	376036		E
-		140.00			376036		E
1		4,500.00		13A0753355-0	380826		D
PR Total		14,503.00					

Actual Labor Cost: 8,326.78 Actual Material Cost: 2,030.35 PO Cost: 10,043.00 Total Cost: 20,400.13

Children of Work Order 178487 (0 - 0 of 0)

Tasks for Work Order 178487 (0 - 0 of 0)

There are no rows to display.

Labor (1 - 3 of 3)

Labor	Name	Regular Hours	Memo	Approved?
MEIER	Todd Meier	100.00		
WINSLOW	Ed Winslow	50.00	research and experimentation	
WINSLOW	Ed Winslow	4.00	178487	

The "Actuals" tab is populated with PO and PR line items from Costpoint once they are associated with the work order # in the JLab Requisition System - <https://misportal.jlab.org/reqs/goHome.do>.

At the bottom of the page are **Labor, Materials, Services, and Tools** tabs. We use the Labor and Materials tabs to record labor hours and materials costs. Click on the "New Row" button to create new line items on the applicable tab. For Labor, the Labor field requires your username, fill in Memo with a labor description, and put in the labor hours. For Materials, first select the "Material" type, then put in a vendor, purchase card type, description, quantity, and unit cost.

The **Actual Labor Cost** and **Actual Material Cost** values are recorded along with the **PO Cost** to provide the **Total Cost** of the work order. These fields are located just below the "Purchase Requisition" section and above the "Children of Work Order ..." section.

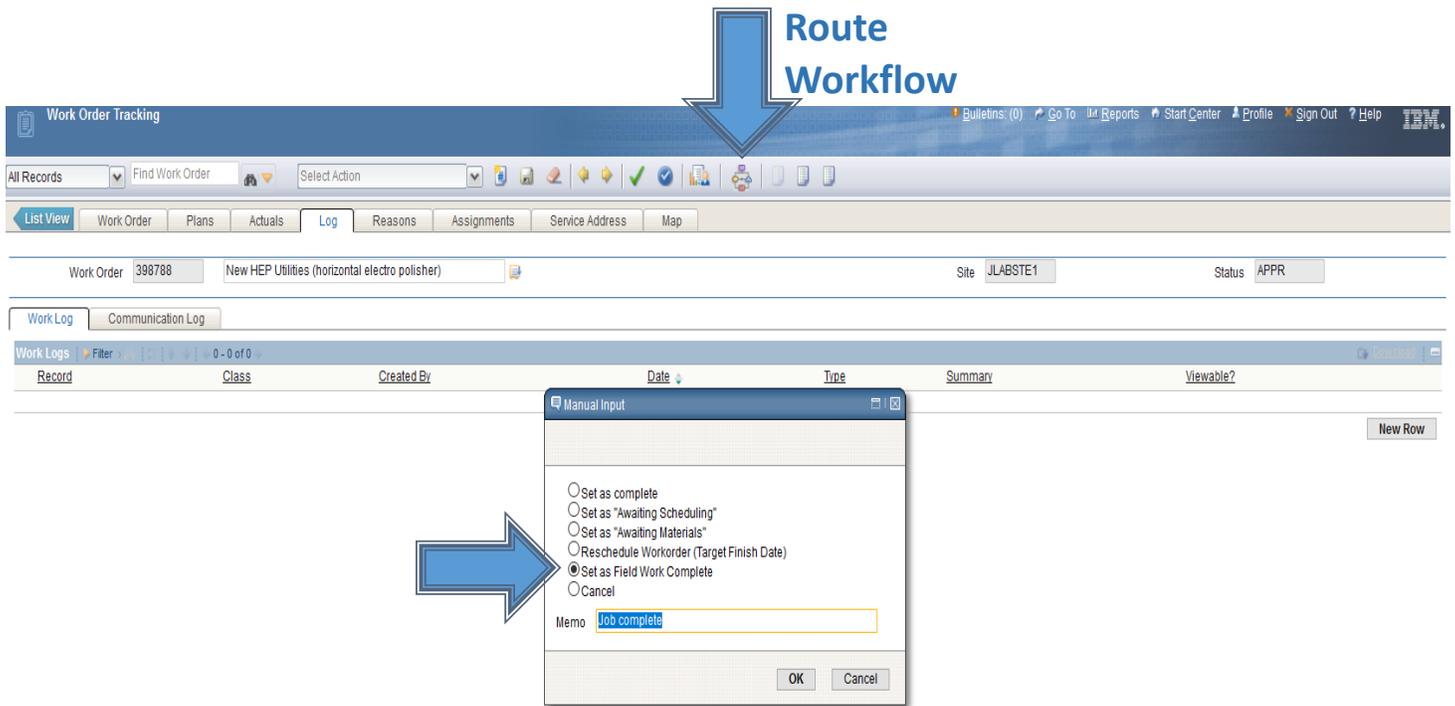
“Log” Tab in Maximo

The screenshot displays the Maximo Work Order Tracking interface. At the top, the 'Work Order Tracking' header is visible. Below it, a navigation bar contains several tabs: 'List View', 'Work Order', 'Plans', 'Actuals', 'Log', 'Reasons', 'Assignments', 'Service Address', and 'Map'. The 'Log' tab is highlighted. Below the navigation bar, the work order details are shown: Work Order 399511, Description 'Please relocate Electrical switchgear from the High Bay to t', Site JLABSTE1, and Status FLDWRKCOM. Below this, there are two tabs: 'Work Log' and 'Communication Log'. The 'Work Log' tab is active, showing a table with one record. The table has columns for Record, Class, Created By, Date, Type, Summary, and Viewable?. The record shows Record 399511, Class WORKORDEF, Created By DOLBECK, Date 2/19/19 4:52 PM, Type CLIENTNOTE, and Summary 'Validate Scope and Determine Budgetary Cost Estimate'. A 'New Row' button is located at the bottom right of the table.

Record	Class	Created By	Date	Type	Summary	Viewable?
399511	WORKORDEF	DOLBECK	2/19/19 4:52 PM	CLIENTNOTE	Validate Scope and Determine Budgetary Cost Estimate	<input type="checkbox"/>

The “**Log**” tab allows you to record communications with the service requester and provide status updates about the work progress, rescheduling, completion, deferral, or cancellation.

Completing a Work Order in Maximo



Once the work is complete, click on the **Route Workflow** button at the top on the light blue bar to set the work order to "**Complete**" for PMs or "**Field Work Complete**" for all other work types. Add a description of the status change in the Memo field. Then click on "**OK**" to change the work order status.

Actuals may still be added until the work order has been set to "**Complete**". If changes are needed after that, the work order will need to be reopened.

For completions, you will be asked if you want to close the service request as well. Select "**OK**" only if all of the work for this task has been complete.