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](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).
Create a Work Request Outside of Maximo

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.
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

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.
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

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

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

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

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

Welcome, sippel

Home  My Work  Subcontractor Work  SRF Work  Logout

If this is an emergency, please call Security at x822 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

<table>
<thead>
<tr>
<th>Wo Num</th>
<th>Date Reported</th>
<th>Status</th>
<th>Group</th>
<th>Description of Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>414136</td>
<td>4/3/19 3:20:53 PM</td>
<td>APPR</td>
<td>FMM</td>
<td>Water leak coming from ceiling going into the vault</td>
</tr>
<tr>
<td>414121</td>
<td>4/3/19 12:14:25 PM</td>
<td>APPR</td>
<td>FMO-P</td>
<td>Water pouring through light fixture onto electrical equipment</td>
</tr>
<tr>
<td>408445</td>
<td>3/23/19 9:11:27 AM</td>
<td>WSCHWO</td>
<td>FMO-S</td>
<td>Bay door won't close</td>
</tr>
<tr>
<td>399164</td>
<td>2/12/19 9:11:02 AM</td>
<td>FLDWRKOMP</td>
<td>FMM</td>
<td>Data Center Room F112B A/C not cooling - same issue again</td>
</tr>
<tr>
<td>389845</td>
<td>12/18/18 11:22:44 AM</td>
<td>WMATL</td>
<td>FMM</td>
<td>Low LCW Supply Pressure alarm</td>
</tr>
<tr>
<td>366520</td>
<td>7/5/18 2:52:13 PM</td>
<td>APPR</td>
<td>FMO-S</td>
<td>Can hear water pouring inside the wall</td>
</tr>
</tbody>
</table>

Your Open Requests

<table>
<thead>
<tr>
<th>Ticket ID</th>
<th>Date Reported</th>
<th>Status</th>
<th>Description of Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>70458</td>
<td>4/3/19 3:20:53 PM</td>
<td>WORKING</td>
<td>Water leak coming from ceiling going into the vault</td>
</tr>
<tr>
<td>70451</td>
<td>4/3/19 12:14:25 PM</td>
<td>WORKING</td>
<td>Water pouring through light fixture onto electrical equipment</td>
</tr>
<tr>
<td>70368</td>
<td>3/28/19 9:11:27 AM</td>
<td>WORKING</td>
<td>Bay door won't close</td>
</tr>
<tr>
<td>70145</td>
<td>3/15/19 1:10:43 PM</td>
<td>WORKING</td>
<td>Key Request Form: 83663</td>
</tr>
<tr>
<td>59646</td>
<td>2/1/19 9:11:02 AM</td>
<td>WORKING</td>
<td>Data Center Room F112B A/C not cooling - same issue again</td>
</tr>
<tr>
<td>59300</td>
<td>1/17/19 2:29:48 PM</td>
<td>WORKING</td>
<td>Portable heater needed for GTS control room</td>
</tr>
<tr>
<td>68993</td>
<td>12/18/18 11:22:44 AM</td>
<td>WORKING</td>
<td>Low LCW Supply Pressure alarm</td>
</tr>
<tr>
<td>56728</td>
<td>7/5/18 2:52:13 PM</td>
<td>WORKING</td>
<td>Can hear water pouring inside the wall</td>
</tr>
</tbody>
</table>

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

Open JLab Work Orders

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

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.

<table>
<thead>
<tr>
<th>Material/Service</th>
<th>Material/Service Description</th>
<th>Quantity</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Material/Service 1</td>
<td>10 gallons of R-134a</td>
<td>10</td>
<td>$200.00</td>
</tr>
<tr>
<td>Material/Service 2</td>
<td>Replacement gasket</td>
<td>1</td>
<td>$50.00</td>
</tr>
<tr>
<td>Material/Service 3</td>
<td>New valve</td>
<td>1</td>
<td>$100.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Labor</th>
<th>Rate</th>
<th>Hours</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor 1</td>
<td>50.00/hr</td>
<td>10</td>
<td>$500.00</td>
</tr>
<tr>
<td>Labor 2</td>
<td>60.00/hr</td>
<td>8</td>
<td>$480.00</td>
</tr>
</tbody>
</table>

Work Order Total: $1,480.00

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.
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

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

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

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.
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.
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.
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](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.
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.