Work Request System Quick Review Guide

Maximo Start Center Overview

Submit a facilities service request here: https://jlab.servicenowservices.com/fmsp?id=fm_index. For those with Maximo access, go here: https://misportal.jlab.org/maximo/ui/login and log in using your JLab userid and password.

Entering Maximo takes you to the "**Start Center**" module to view your work group's **pending** (unaccepted) service requests at the top. Scroll down to view your work group's **open** (accepted) work orders. You will need to log into Maximo on a regular basis to review your pending service requests to see which requests need your attention from other submitters as well as to accept your own requests to turn them into work orders where you can provide log updates to the work progress and finish as well as record your labor hours worked each day until the issue is resolved.

Each section on the **Start Center** allows you to view a small number of your service requests and work orders per page and provides a scroll bar to view all items as well as a "**Next Page**" link to click on to view more items in the section. You can increase how many rows display on each page per section by clicking on the "**Edit Portlet**" icon in the gray bar for each section, changing the "**Rows to Display**" number in the upper right corner and then saving the change, which will close the edit session and return you back to the **Start Center**.

Clicking on any of the bold lettered and underlined column headers allows you to sort the section rows by ascending or descending order. An up or down arrow to the right of a column indicates that column is sorted and in which direction. You can also type in the empty boxes below the column headers to filter the data. You must manually clear out all of the boxes to see all of the rows again in that section.

Click on any of the text in a section row to see more details about the service request or work order. You can see in the upper left corner that the name of the module will change – service requests will display "**Service Requests**" and work orders will display "**Work Order Tracking**". Click on "**Start Center**" link in the upper right blue bar to return to the **Start Center**. You can also view all of your pending service requests or open work orders together by clicking on the "**Open Result Set in the Application**" icon in the gray bar at the top of each section.

Accepting a pending service request (from the "**Route Workflow**" icon) allows you to create a work order for corrective maintenance (CM), preventive maintenance find (PMF), modernization (MOD), materials (MATL), service work (SW), or capital project (CP) work types. Preventive maintenance (PM) work orders for scheduled maintenance work are created automatically from the PM module according to the PM frequency assigned to that work and therefore do not require service request numbers.

When you accept a pending service request, it will be removed from the pending service requests queue and its status becomes "**WORKING**". The work order created (containing the service request contents) will be displayed in the list of open work orders, and you will become the owner of both. The target finish date will be assigned according to the priority and date specified by the submitter. The higher the priority, the sooner the work is due for completion.

Service Requests Module Overview

On the **Start Center** page, click on the "**Go To**" link to the left of the "**Start Center**" link in the upper right blue bar and select **Service Desk** -> **Service Requests** to go to the Service Requests module to access you service requests. It will display a blank page, so click on the upper left "**Query**" box below the blue bar and then select "**All Records**" to display all of the service request records or scroll down and choose another query in the list such as "**Mechanical SR's Pending**" or "**Mechanical SR's Working**".

All underlined column headers can be sorted ascending/descending by clicking on them and all empty boxes can be typed in to filter the results. A magnifying glass symbol beside the "**Status**" column header allows you to select which statuses to filter on by clicking on the empty box beside each selection and then hitting the "**OK**" button and then the "**Enter**" key.

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Only 20 rows will be displayed per page. The "**Service Requests**" gray bar displays the numbering of rows along with the total number of results. To the right on the right gray bar is a "**Download**" link that will take the display results and download them to an excel file which then pops up in another window for you to click on.

To access a service request, you can only click on the underlined number in the "**Service Request**" column. To exit the record, click on the blue "**List View**" arrow on the upper left tab, **NOT** on the back arrow <- at the top of the page.

Work Order Tracking Module Overview

On the **Start Center** page, click on the "**Go To**" link to the left of the "**Start Center**" link in the upper right blue bar and select **Work Orders** -> **Work Order Tracking** to go to the Work Order Tracking module to access your work orders. It will display a blank page, so click on the upper left "**Query**" box below the blue bar and then select "**All Records**" to display all of the work order tracking records or scroll down and choose another query in the list such as "**Electrical CM Work Orders**" or "**Mechanical PM Work Orders**" to see the open electrical or mechanical group CM or PM work orders needing review.

All underlined column headers can be sorted ascending/descending by clicking on them and all empty boxes can be typed in to filter the results. A magnifying glass symbol beside the "**Work Group**" and "**WO Status**" column headers allows you to select which work groups and statuses to filter on by clicking on the empty box beside each selection and then hitting the "**OK**" button and then the "**Enter**" key.

Only 20 rows will be displayed per page. The "**Work Order Tracking**" gray bar displays the numbering of the rows along with the total number of results. To the right on the gray bar is a "**Download**" link that will take the display results and download them to an excel file which pops up in another window for you to click on.

To access a work order, you can only click on the underlined number in the "**Work Order**" column. To exit the record, click on the blue "**List View**" arrow on the upper left tab, **NOT** on the back arrow <- at the top of the page.

Work Order Tabs

You are automatically placed in the "**Work Order**" tab at the top of the page when you click on a work order number. This is the main display for the work and includes the work order number, description, details, work classification, work priority, work type, work group, owner, lead, status, originating record (access is by "**>>**" to the service request), vendor, refrigerant info, estimated work cost, and listings for multiple work locations at the bottom.

In the "**Plans**" tab, there is a section to display any child work orders or tasks. Click on any underlined column headers to sort ascending/descending rows or click on "**>>**" to select child work orders, locations, or assets or task owner or owner group. You can also change the status of any item by clicking on the "**Change Status**" icon at the end of each row. Click on "**New Row**" to add a new child or task work order.

In the "**Actuals**" tab. there is a section to display the "**Purchase Orders**", the "**Purchase Requisitions**" assigned to the work order, and at the bottom, you can enter your labor hours in the "Labor" tab by clicking on "**New Row**" and invoice vendor costs <u>not</u> covered in the "**Purchase Orders**" section in the "**Materials**" tab by clicking on "**New Row**" and changing "**Type**" from "**Item**" to "**Material**".

You can review the labor hours charged for your work group (choose group, start date, and end date) here: https://mis.jlab.org/mis/apps/facilities/fmTimesheetDetailByGroup.cfm.

In the "**Log**" tab, click on "**New Row**" to provide a status of the work in the **Summary** and more information in the **Details**. Save changes using the icon at the top of the page.

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In the gray bar above the work order tabs are various icons. Use to approve the work order (status is APPR), to complete it (status is COMP), and use the work order print icons to display varying amounts of detail when printed.

Preventive Maintenance (PM) Frequencies

PM work orders can be generated immediately when needed, but are usually left to automatically generate on the first of the month according to their frequency. The target finish date is usually the end of the same month, regardless of the length of the frequency, except for weekly PMs. PMs usually include the frequency in their name to aid in reviewing their target finish date and can be changed at any time by the CMMS Administrator. These frequencies are as follows:

Name	Frequency	Description
W	Weekly	Generate work orders every week or # of weeks
M	Monthly	Generate work orders every month or # of months
B	Bi-Monthly	Generate work orders every 2 months
Q	Quarterly	Generate work orders every 3 months
SA	Semi Annually	Generate work orders every 6 months
A	Annually	Generate work orders each year
#Y	# of Years	Generate work orders every # of years

You can review the upcoming PMs for your work group (choose the work group, start date, and end date) here: https://mis.jlab.org/mis/apps/facilities/pmsForGroup.cfm.

If you just want to review the work order and add a log and labor hours all on one page, please refer to the document: **JLab 'My Work' application for managing work orders outside of Maximo**.

Completing or Canceling Work Orders (all users)

You will need to review your open work orders each month to determine which ones need action before the next PM work orders generate or a work order is due to be completed or canceled (see the work order's Target Finish Date).

PM work orders with "**Monthly**" in their description must be completed (routed to "**COMP**" status) or canceled (routed to "**CANCEL-NOACCESS**" [no access to location] or "**CANCEL-NR**" [no resources/personnel available] status) by the end of each month. "**Bi-Monthly**" PM work orders may remain open for 2 months including the target finish date until they need action. "**Quarterly**" PM work orders may remain open for 3 months including the target finish date until they need action. "**Semi-Annual**" PM work orders may remain open for 6 months including the target finish date until they need action. "**Annual**" PM work orders may remain open for 1 year including the target finish date until they need action.

Completing or Closing PM Work Orders (CMMS Administrator)

The CMMS Administrator will review the open PM work orders at the end of each month to determine which ones need action before the next PM work orders generate at the start of the following month. The same schedule noted above applies for the PM work order target finish dates based on the frequency in their description. Open PM work orders will be completed (routed to the "**COMP**" status) if any of the child work orders/job plan tasks are completed or, for no child work orders, if there are labor hours recorded. Any open child work orders/job plan tasks will be closed (routed to the "**CLOSE**" status) if there are no labor hours recorded or log stating work was performed. Upon request, open work orders will be routed to "**CANCEL-NOACCESS**" or "**CANCEL-NR**" status if there is no access or no resources/personnel available.