



Facilities CMMS (Computerized Maintenance and Management System) Overview

Facilities Management & Logistics (FM&L)

Jefferson Lab (JLab) Facilities CMMS Overview

Facilities CMMS roles and responsibilities:

- Work Group Managers – submit service requests for projects; review open work orders with their work group(s); manage purchase requests and invoices; manage annual subcontract work orders.
- Work Group Coordinators & Alternates – submit service requests for work group; review and manage pending service requests; review upcoming scheduled work; assign work order leads; review open work orders with leads; resolve preventive maintenance (PM) work orders due.
- Technicians – review assigned work orders; submit service requests for corrective maintenance, PM finds, tools and equipment needs, regularly review and order supplies needed for work tasks in assigned work orders.
- Technical Representatives (TRs) – provide subcontractors selected to manage their active subcontracts with a subcontractor user id and password to the subcontractor dashboard at: https://misportal.jlab.org/facilities/subcontractor_login. Manage subcontractor work orders.
- Subcontractors – review assigned work orders on subcontractor dashboard and update when field work is complete.
- CMMS Administrators – classify work group and job type on all pending service requests; alert work group coordinators to high priority/emergency service requests; manage active assets, PM library, routes, & job plans; review pending service requests and open work orders with work groups; provide routine and ad-hoc reports and metrics as requested.

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Maximo Training Resources (<https://www.jlab.org/facilities/handylinks>):

- **Work Request System Quick Review Guide** – information to manage service requests and work orders
- **Asset Management Process** – details the CMMS basic modules used at JLab
- **PM Scheduling Process** – process for scheduling routine equipment maintenance
- **‘My Work’ Application Guide** – for managing work orders outside of Maximo. Information for users without access to Maximo or those who prefer a simple work order update screen to manage their open work orders

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How Maximo data is used:

- Provide asset deficiency-based reports and operating asset lists by location to the facility engineer to use when performing building/location and asset condition assessments. Descriptions of the issues and repair needs are entered by the engineer into the Department of Energy (DOE) Condition Assessment Information System (CAIS) database – a web-based cost estimating application to ensure real property assets (buildings, trailers, other structures, and land) are maintained in a manner that meets DOE program goals and are reported to the DOE annually.
- Provide facilities costs by location to report annual actual maintenance costs to the DOE. This requires all FM&L PRs to have an associated work order and all completed work orders to have labor hours accurately recorded and the status completed at the time of actual task completion.
- Track real (building/non-personal) property assets in the DOE Facility Information Management System (FIMS) database. CAIS interfaces with FIMS to provide critical data elements including Repair Needs, Deferred Maintenance, and Modernization Costs along with each location's Functionality Assessment Date and Replacement Plant Value (RPV).
- Provide assets to ePAS system Plant Items listing for use in work permits.

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Notes:

- Issues with the use of Maximo are reported to the CMMS Administrator (Tracy Draine draine@jlab.org – x6780). If further assistance is required, a ServiceNow ticket will be submitted to MIS.
- A Maximo developer area is available for users with Maximo access to train and explore the CMMS without affecting the live version here: <https://misportaldev.jlab.org/maximo>. There is no notice on the site that it is a developer area, so you will need to look at the URL at the top of the page for reference.
- Assets needed in ePAS will need to first be created in Maximo using the accepted naming convention. A teams/email/phone request can be sent to Tracy, Linda, and Anne. Uploads to ePAS occur overnight automatically. Users with temporary plant item permission can create an ePAS plant item for emergencies, which can then be set up as a permanent plant item later or a request can be sent to Diann Goodhand to add it directly in ePAS.