



Maximo 7.6.1 Key User Training Guide, ANU Unit 4: Work Order Management



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NOTICE

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Change record

Date	Author	Version	Change Reference
10 October 2019	Velibor Djukic	V1.0	Training Documentation for ANU, Unit4: Work Order

Typographical conventions

In this course, the following typographical conventions are used.

Convention	Usage
Bold	Commands, keywords, file names, authorization roles, URLs, or other information that you must use literally appear in bold .
<i>Italics</i>	Variables and values that you must provide appear in <i>italics</i> . Words and phrases that are emphasized also appear in <i>italics</i> .
<i>Bold Italics</i>	New terms appear in <i>bold italics</i> when they are defined in the text.
Monospace	Code examples, output, and system messages appear in a <code>monospace</code> font.
→	In this manual, the arrow character is used as a path arrow. The arrow indicates the path to the named window.

Course introduction

This course is a scenario-based course designed for individuals who need to manage Maximo 7.6. Through lecture, instructor demonstration, and exercises, students will discuss work management activities.

Objective

Upon completion of all lessons in this unit, you will be able to:

- Perform day to day End User transactions in the Work Order
- Follow the WO Workflow process

Outline

The following outline is a high-level description of the contents of this course. Each unit has an overview presentation, and most have a series of student exercises designed to reinforce the concepts presented. The course contains the following units:

Unit 1: Maximo Navigation, Start Centres, and Reporting

In this unit, you will learn about creating and managing queries and KPI's and how these can be used in the Start Centre. You will also learn how to schedule reports.

Unit 2: Maximo Works Management Applications

In this unit, you will learn about the various Work Management applications which allow for efficient management of maintenance and repairs required for your assets.

Unit 3: Service Request

In this unit, you will learn about the Service Request application and process.

Unit 4: Work Order

In this unit, you will learn about the Work Order Tracking application and process.

Unit 5: DatasplICE

In this unit, you will learn about the DatasplICE mobile application and process.

Lesson 1: Work Orders, PM/CM/EM

Preventive Maintenance (PM) work is maintenance work performed on a regular basis in order to keep assets running efficiently. A PM work order is generally based on a predefined schedule or can be manually created in the Work Order application.

Corrective Maintenance (CM, Planned Work) work is maintenance work that needs to be performed but not necessarily immediately. On creation, a complete job package is produced which may include detailed work instructions, relevant drawings, schematics and safety plans and can be given to the maintenance crew to perform the work.

Emergency Maintenance (EM) is work that must be corrected immediately due to its urgent nature such as; it is life threatening or safety critical, can damage assets, it is production critical.

KEY ASSUMPTIONS

- User has logged on and has security privilege for managing work orders

USER ACTIVITIES

The Maximo application functions in the same manner for work order irrespective of type (PM, CM or EM).

To Perform the following activities on CM Work Orders please refer to the equivalent guide in Work Order Management for PM Work Orders substituting all referencing to the work type PM with CM.

Activity Name

Create Work Order

Manual Creation

1. From the Start Centre, go to the Work Order Tracking application:
Go To (menu) → Work Orders → Work Order Tracking
2. Click the **'New Work Order'** button (+),
- Or
3. An alternative is to use the Quick Insert Actions on the Start Centre to create a **'New Work Order'**

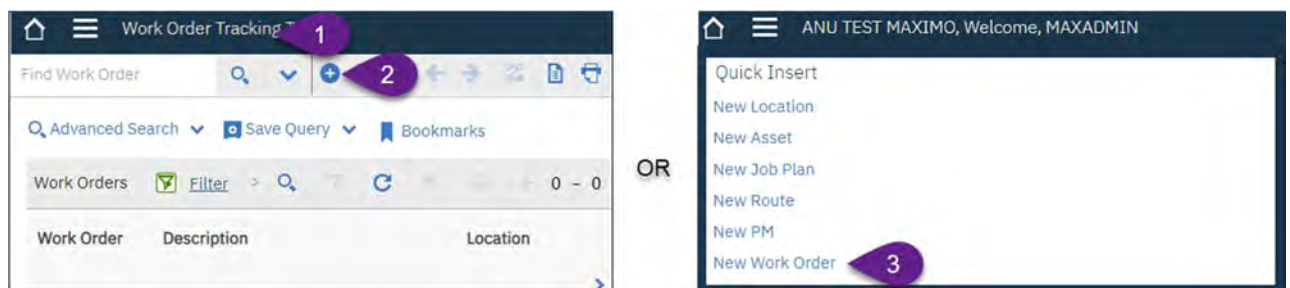


Figure 1 – New Work Order

4. The new Work Order screen will be displayed. Enter the following details.
 - a) The WO number will be automatically generated. Accept this default number.
 - b) Enter a short description for the work order
 - c) When there is a longer description required then press the long description button (≡). Once entered, press the OK button to return to this screen.
 - d) When the work order is for a location then enter/select the location
 - e) When the work order is for an asset then enter/select the asset
 - f) Enter/select a Work Type for the work. E.g. 'PM' for Preventive Maintenance
 - g) Add the appropriate attachments required for the work. This may include a JSA, schematics, pictures, web address for any related web links etc.
 - h) Enter a priority for the work order
 - i) Enter/select a Target Start Date for the work order
 - j) Enter/select a Target Finish Date for the work order
 - k) Enter an estimated duration for the work
 - l) Enter/select the Supervisor for the work
 - m) Press the save button (💾).

Work Order Tracking TEST MAXADMIN IBM

Find Work Order:

4 **Work Order** Plans Assignments Related Records Actuals Safety Plan Log Failure Reporting Service Address Map 3D View

Work Order: 10617 **a** VAC - Service Washable fly screen air filter **b** **c** Site: ACTON

Location: 117 **d** Ennor Building **e** Class: WORKORDER

Asset: **e** **f** + Work Type: PH

Parent WO: **f** + GL Account: 6188P.C.MT000.3117

Repair Facility Required? ☐ Failure Class: **f**

Repair Facility: **f** Problem Code: **f**

Repair Facility Site: **f**

External Parts purchased? ☐ **g**

Status: WSC **g**

Status Date: 12/09/19 11:04 AM

Inherit Status Changes? ☒ **g**

Is Task? ☐ **g**

Job Details **Asset Details** **Priority**

Job Plan: FIL/VLM **h**

Job Plan Revision #: 0

PRI: PH2017 **h**

Safety Plan: **h**

Contract: **h**

Total Work Units: 1.00 **h**

Asset Up? ☐ **h**

Warranties Exist? ☐ **h**

SLA Applied? ☐ **h**

Charge to Store? ☐ **h**

Current Value: **h**

Asset Location Priority: **h**

Priority: **h**

Priority Justification: **h**

Risk Assessment: **h**

Address Information

Service Address: 117 **h**

Formatted Address: 117 Gann Road, Acton, CANBERRA, ACT, AU, 2601 **h**

Street Address: 117 Gann Road **h**

City: CANBERRA **h**

State/Province: ACT **h** Australian Capital Territory **h**

Multiple Assets, Locations and CIs **Filter** **0 - 0 of 0**

Asset	Location	Configuration Item	Target Description	Sequence	Mark Progress?	Inspection Form	Inspection Result	Site	Total Work Units
There are no rows to display.									

Scheduling Information **Follow-up Work**

Target Start: 1/10/19 12:00 AM **i** Actual Start: **i**

Target Finish: 1/10/19 1:30 AM **j** Actual Finish: **j**

Scheduled Start: **k** Duration: 1.30 **k**

Scheduled Finish: **k** Time Remaining: **k**

Start No Earlier Than: 1/10/19 12:00 AM **k**

Finish No Later Than: 1/10/19 1:30 AM **k**

Requires Asset Downtime? ☐ **k**

Requires Location Downtime? ☐ **k**

Include Tasks in Schedule? ☒ **k**

Requires Asset Maintenance Window? ☐ **k**

Requires Location Maintenance Window? ☐ **k**

Originating Record: **k**

Originating Record Class: **k**

Request Type: **k**

Issue Type WHS or Business Continuity?: **k**

Figure Reference Number: **k**

Has Follow-up Work? ☐ **k**

Interruptible? ☐ **k**

Interruptible Shift: **k**

Is Milestone? ☐ **k**

Responsibility

Reported By: MAXADMIN **i**

Reported Date: 12/09/19 11:04 AM **i**

On Behalf Of: u4444980 **i**

Phone: **i**

Supervisor: U4459057 **i**

Vendor: **i**

Lead: **i**

Drew: **i**

Work Group: MECH **i**

Owner: **i**

Owner Group: MECH **i**

Service Group: **i**

Service: **i**

Crew: **i**

Crew Work Group: **i**

Figure 2 – Populating fields on new Work Order

5. Select the Plans tab, to enter planning information.

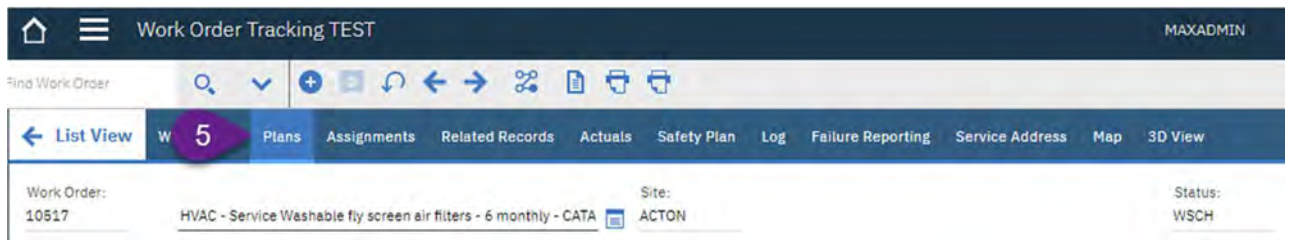


Figure 3 - Plans Tab of Work Order

6. On the Labor tab, planned labor can be added using:

- The **'Select Craft'** button or
- The **'New Row'** button

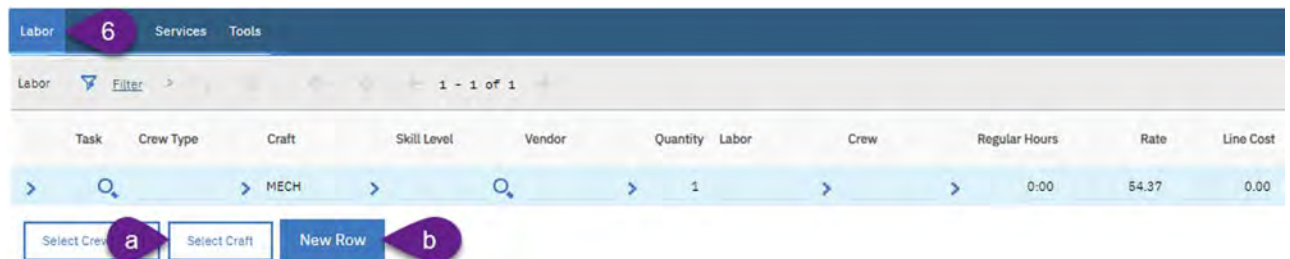


Figure 4 - Adding Planned Labor

7. When using the **'Select Craft'** button a list of crafts is displayed:

- Filter the list to appropriate crafts for the work
- Select the appropriate Craft and Skill level for the work, multiple selections can be made
- Press the **'OK'** button to add them to the planned labor list

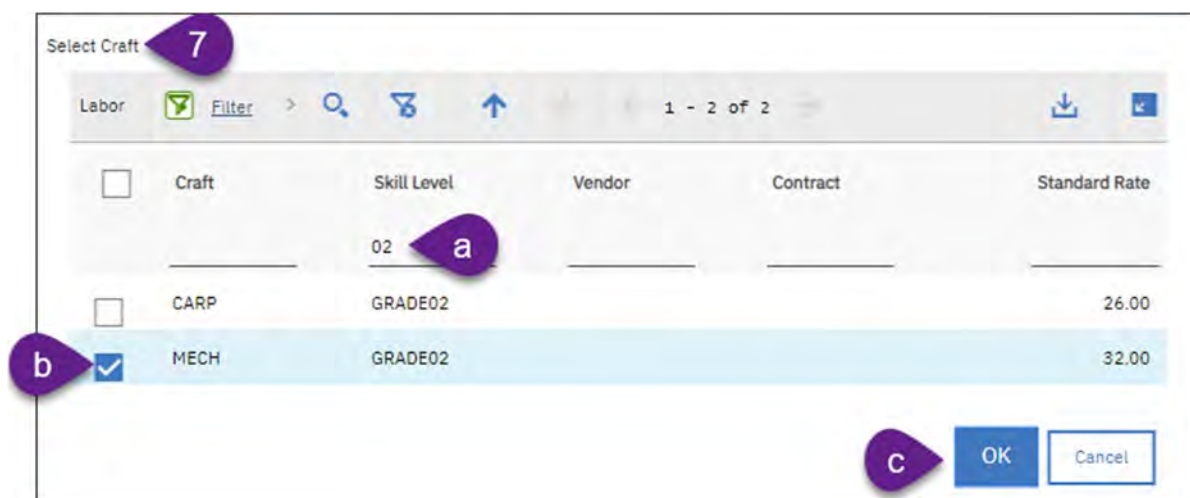


Figure 5 - Select Craft on Planned labor

- d) The work order estimated duration is automatically applied to the plan and can be adjusted
- e) The Craft hourly rate is automatically multiplied by estimated to generate a planned labor cost for the work.

Labor										
Materials Services Tools										
Labor Filter 1 - 2 of 2										
Task	Crew Type	Craft	Skill Level	Vendor	Quantity	Labor	Crew	Regular Hours	Rate	Line Cost
> Q	>	MECH	> GRADE02 Q	>	1	>		1:00	32.00	32.00
> Q	>	MAINT	> Q	>	1	>		0:00	48.69	0.00
<div> <div>Select Crew Type</div> <div>Select Craft</div> <div>New Row</div> </div>										

Figure 6 - Planned Labor Costs

8. When using the 'New Row' button the new row is generated with:
 - a) A default quantity of 1 (this can be edited)
 - b) Estimated duration of work as the 'Regular Hours' (this can be edited)
 - c) Use the Craft 'Select value'
 - d) Filter the list of crafts suitable for the work
 - e) Select one suitable Craft

Task	Crew Type	Craft	Skill Level	Vendor	Quantity	Labor	Crew	Regular Hours	Rate	Line Cost
> Q	>	MECH	> GRADE02 Q	>	1	>		1:00	32.00	32.00
> Q	>	MAINT	> Q	>	1	>		0:00	48.69	0.00
> Q	>		> Q	>	1	>		1:00		0.00

Task: Q

Crew Work Group: >

Crew Type: >

Craft: > c

Skill Level: Q

Vendor: >

Labor Contract: >

Quantity: 1 a

Crew: >

Labor: >

Outside? ☐

Regular Hours: 1:00 b

Rate: >

Select Crew Type

Select Craft

New Row h

Select Value c

Craft	Skill Level	Description	Vendor	Contract	Standard Rate	Organization
MECH						ANU
MECH		Mechanical Services			54.37	ANU
MECH	APPRENTICE	Apprentice			22.00	ANU
MECH	GRADE01	Grade 01			28.00	ANU
MECH	GRADE02	Grade 02			32.00	ANU e
MECH	GRADE03	Grade 03			40.00	ANU
MECH	GRADE04	Grade 04			48.00	ANU
MECH	GRADE04	Grade 04	0000000318		70.00	ANU

Cancel

Figure 7 - New Row on Planned Labor

9. On the Materials tab (**Note: Materials tab is not used by ANU**), planned materials can be added using:
 - a) The **'Select Materials'** button or
 - b) The **'New Row'** button

Note: The **'Select Asset Spare Parts'** button is similar to **'Select Materials'** however the list is restricted to items previously identified as spares for the asset on the work order.

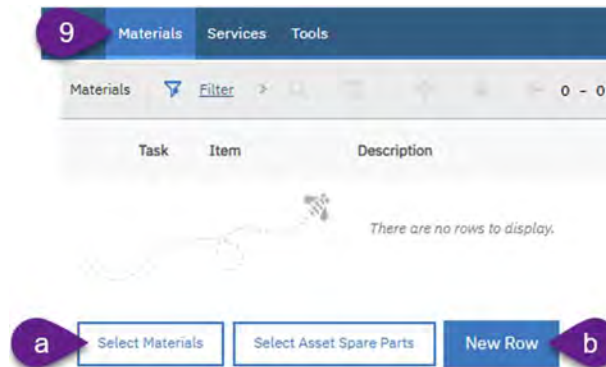


Figure 8 - Materials Tab on Work Order

10. Using the **'Select Materials'** button a list of Materials (items) is displayed:

- a) Filter the list to appropriate materials
- b) Select one or more materials/items that are to be used for that work order
- c) Press the **'OK'** button to add them to the Planned Materials list
- d) Select the storeroom.

Materials that have been added to the storeroom or purchased into storeroom will have costs associated and will automatically be displayed when the storeroom is selected. The values for quantity and unit cost can be edited to determine the line cost. Direct Issue should be selected when Maximo is used to purchase the materials specifically for the work order. That is the materials will not be reserved in the storeroom, they will be purchased and delivered directly the work order. By applying quantity and unit costs the Work Order will have an estimated Material Cost.

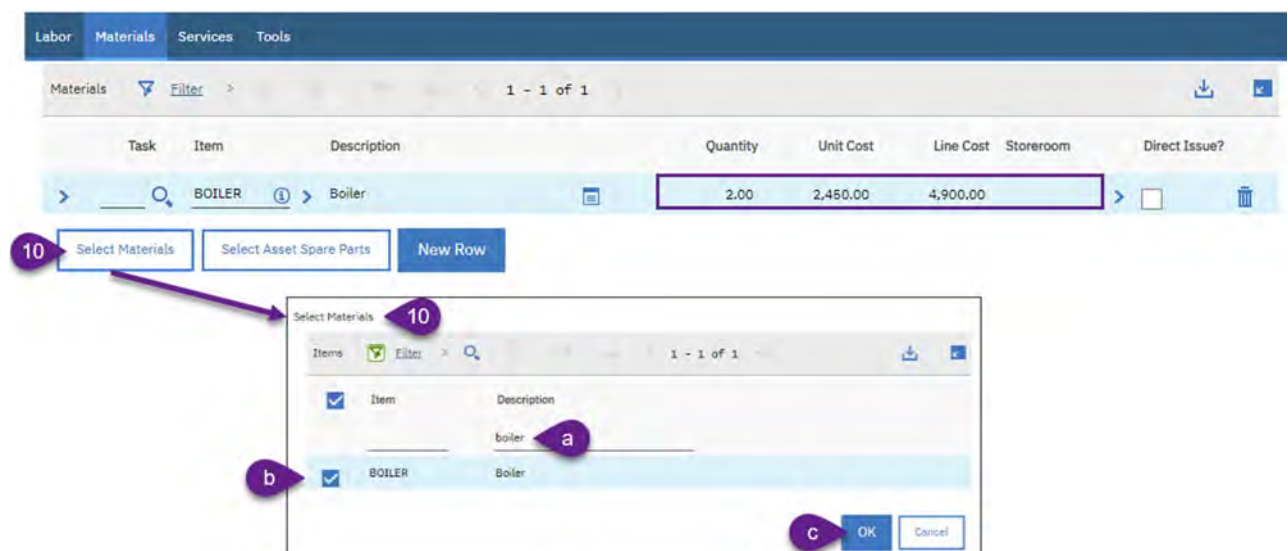


Figure 9 - Select Material Option

11. Using the **'New Row'** button.

The new row will default to **'Line Type'** of Item.

- Select **'Material'** from the Line Type drop down list:
- Enter a description for the material that is required for the work
- When a longer description is required, press the long description button (📄). Once entered, press the OK button to return to this screen.
- Enter the quantity of the material required
- Enter the order unit e.g. each or box. To create order units, use the Units of Measure application.
- Enter the estimated unit cost
- Enter/select the Vendor from which to purchase the material
- Direct Issue is set by default as the Material is not stocked and is being ordered specifically for this work order.

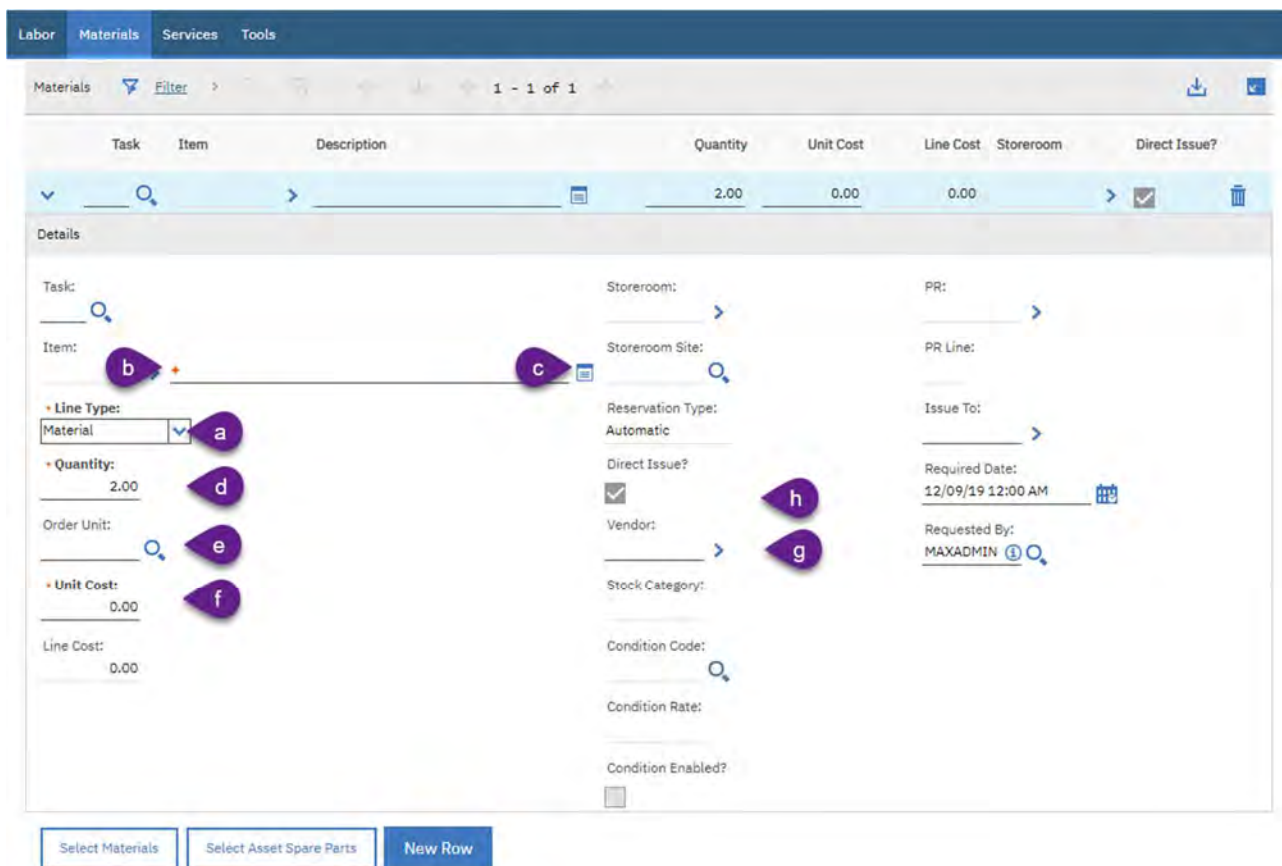


Figure 10 - New Row on Materials Tab

Repeat for additional materials as required.

12. On the Services tab (**Note: Services tab is not used by ANU**), planned services can be added using:
- The **'Select Standard Services'** button (predefined services) or
 - The **'New Row'** button (ad hoc service for this work order)

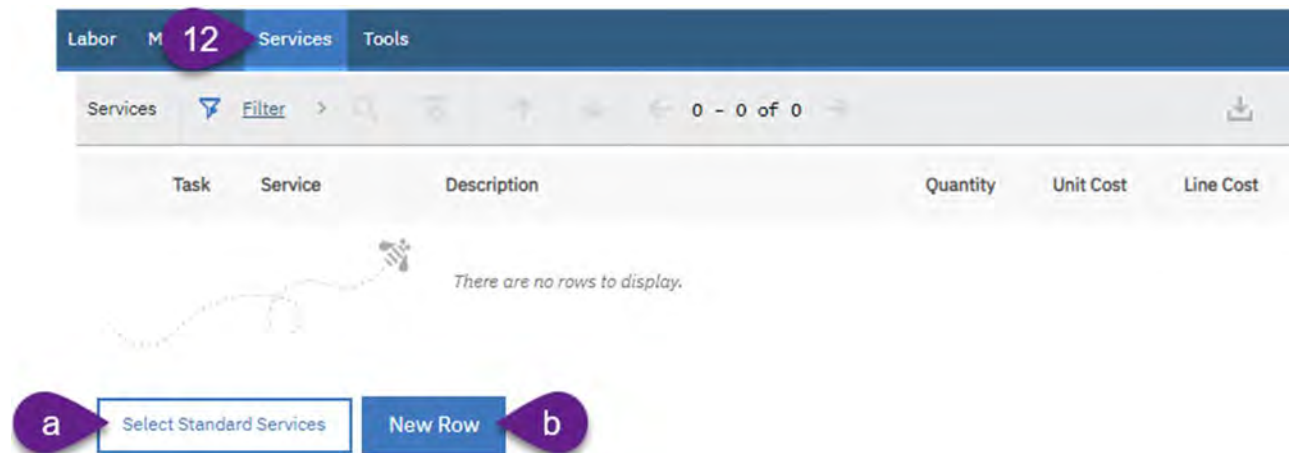
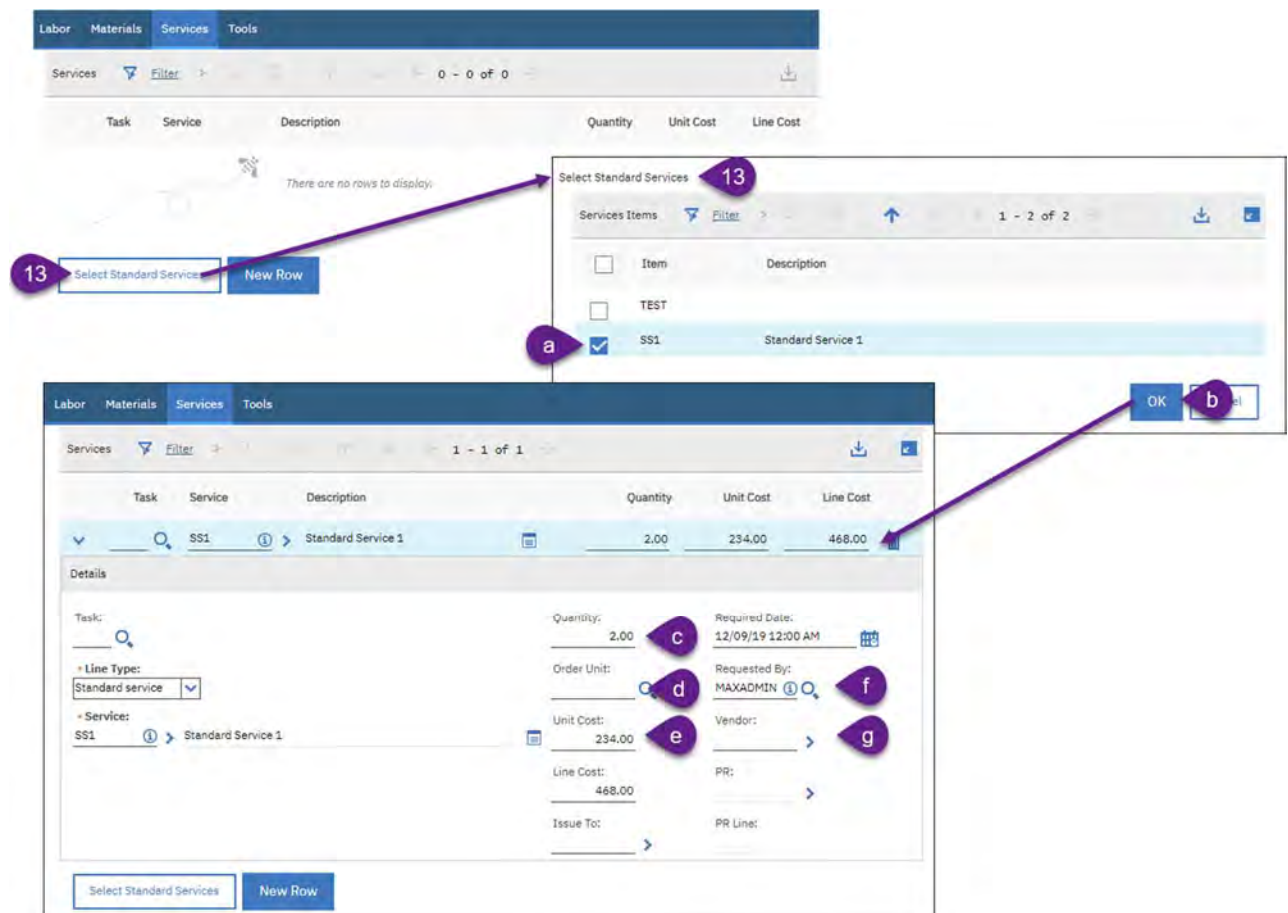


Figure 11 - Planned Services on Work Order

13. Using the **'Select Standard Services'** button a list of Service Items is displayed:

- a) Select the required services (one or more) by clicking in the check boxes.
- b) press the **'OK'** button to accept the services selected
If the Standard Service was correctly setup when initially created the unit cost, order unit and vendor will be automatically populated from the Standard Service record. Requested By will default to the current user while the Quantity will default to 1 and the Required Date will default to the target start date and time for the work order. These values can be edited.
- c) Quantity of services required
- d) Order Units for the service (maintained in the Units of Measure Application)
- e) Order unit cost (line cost is calculated using quantity and unit cost)
- f) Requested by can be selected and would typically be the work order supervisor or team leader.
- g) The Vendor can also be adjusted if the preferred vendor was not setup in Standard Services



The screenshot illustrates the 'Select Standard Services' process. The main window shows a table with columns: Task, Service, Description, Quantity, Unit Cost, and Line Cost. The 'SS1' service is selected, showing a quantity of 2.00, unit cost of 234.00, and line cost of 468.00. The 'Details' section shows the selected service and its associated fields: Quantity (2.00), Order Unit (C), Unit Cost (234.00), Line Cost (468.00), Required Date (12/09/19 12:00 AM), Requested By (MAXADMIN), and Vendor. The 'OK' button is highlighted, and the 'Select Standard Services' button is also visible.

Figure 12 - Using 'Select Standard Services'

14. Using the **'New Row'** button enter the details for a Non-Standard Service that is required

- The Line Type defaults to **'Service'**
- Enter a description for the service required
- When there is a longer description required then press the long description button (📄). Once entered, press the **'OK'** button to return to this screen.
- Enter the quantity of the service required
- Enter the unit of measure for the service
- Enter the order unit cost
- If the person requesting the service for the work is different from the user logon then this can also be changed here.
- Enter/select the Vendor from which the service is to be obtained

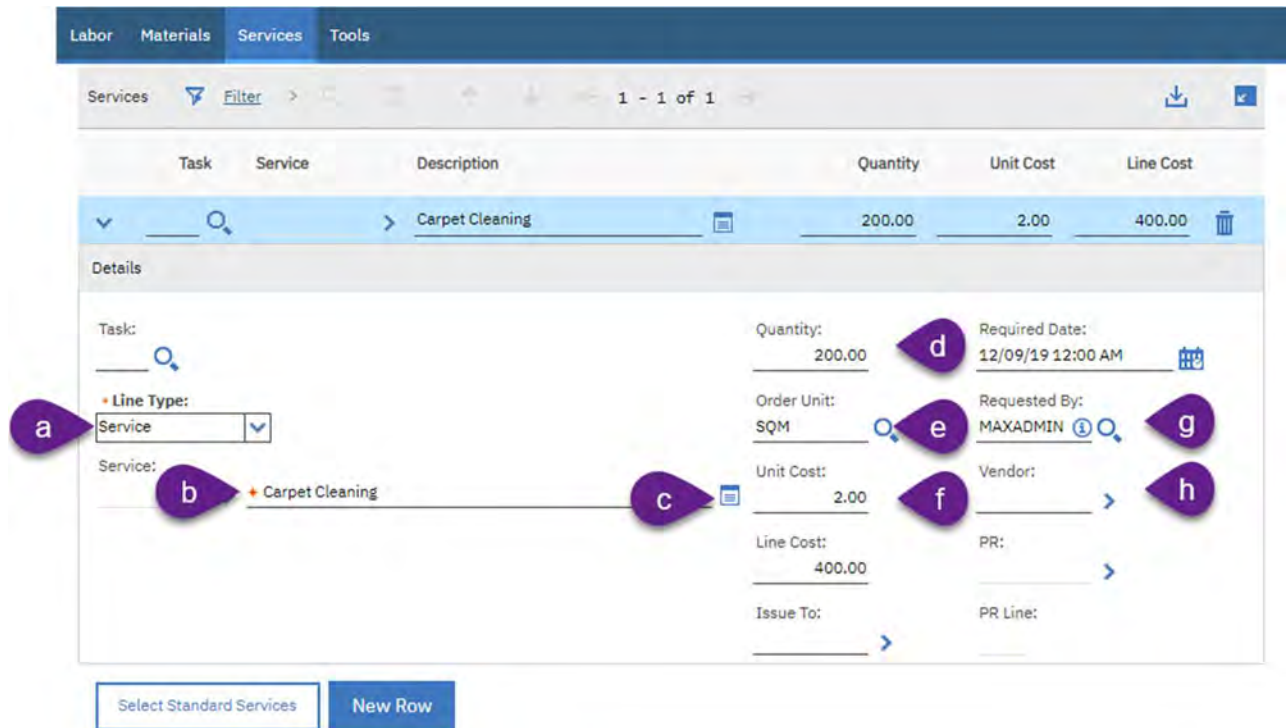


Figure 13 - New Row on Planned Services

Repeat until required services have been entered.

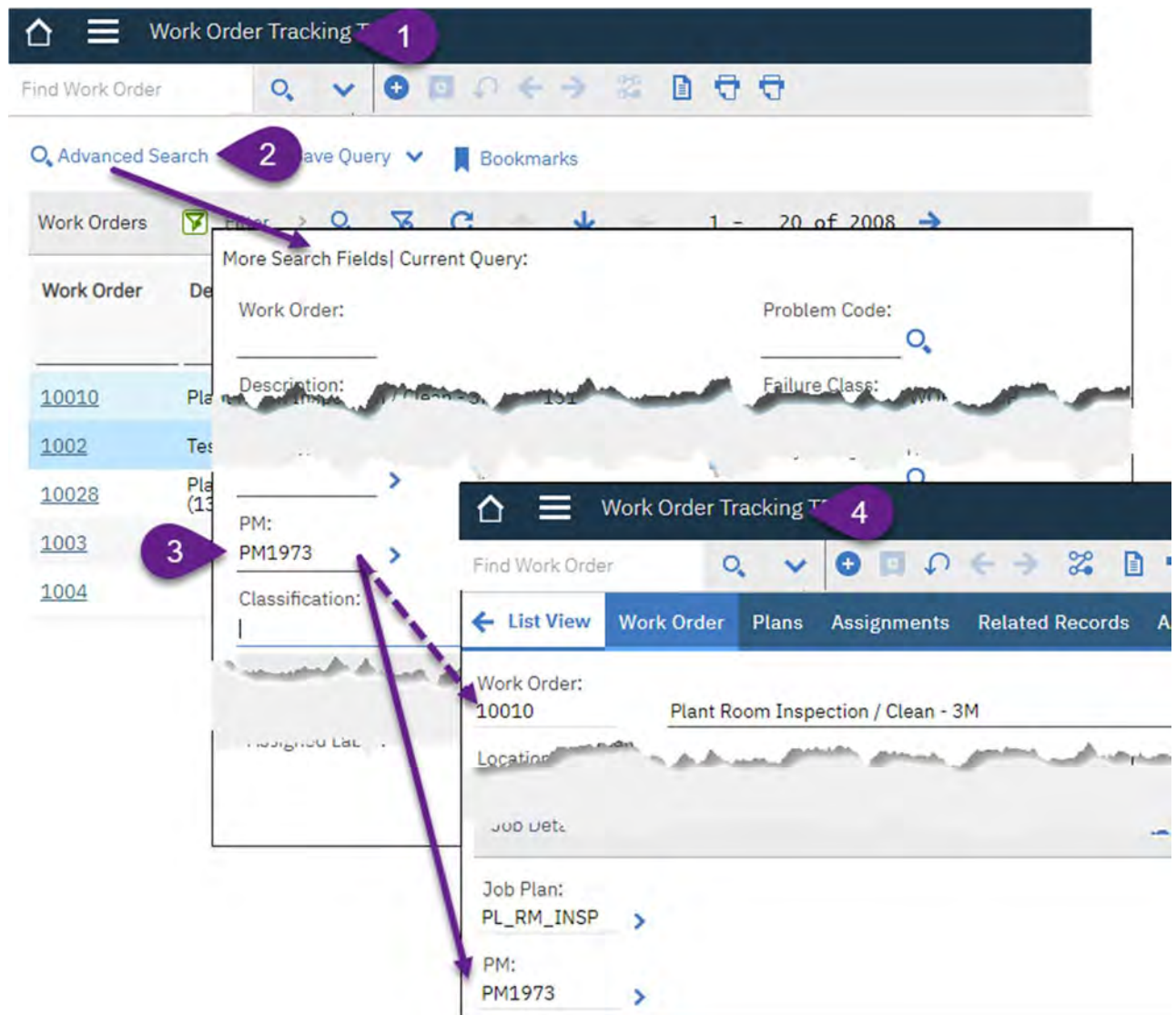
When complete press the **'Save'** button (💾) to save the work order.

Note: When the **'Reorder Direct Issue Itms/Svcs'** process is run purchase requests for the direct issue materials and services will automatically generated.

WO autogenerate by PM

Most of the work order records will be autogenerated by PM in WAPPR state. Record will have PM and JP fields populated.

1. From the Start Centre, go to the Work Order Tracking application:
Go To → Work Orders → Work Order Tracking
2. Select '**Advanced Search**' option
3. Enter PM in search field
4. Select Work order record that is created using exact PM.



The screenshot illustrates the steps to find a work order generated by a specific PM. The application is 'Work Order Tracking'. The search process is as follows:

- Step 1:** The user is in the 'Work Order Tracking' application.
- Step 2:** The 'Advanced Search' option is selected from the search bar.
- Step 3:** The search criteria are set to 'PM: PM1973'.
- Step 4:** The search results are displayed, and the work order '10010' is selected.

The details of the selected work order '10010' are shown below:

Field	Value
Work Order:	10010
Location:	Plant Room Inspection / Clean - 3M
Job Plan:	PL_RM_INSP
PM:	PM1973

Figure 14 - PM generated WO

Follow up WO

1. From the Start Centre, go to the Work Order Tracking application:
Go To → Work Orders → Work Order Tracking
2. Enter search criteria and press 'Enter' to filter the Work Order list
3. Select the Work Order to be reviewed – this will open the record in the Work Order tab

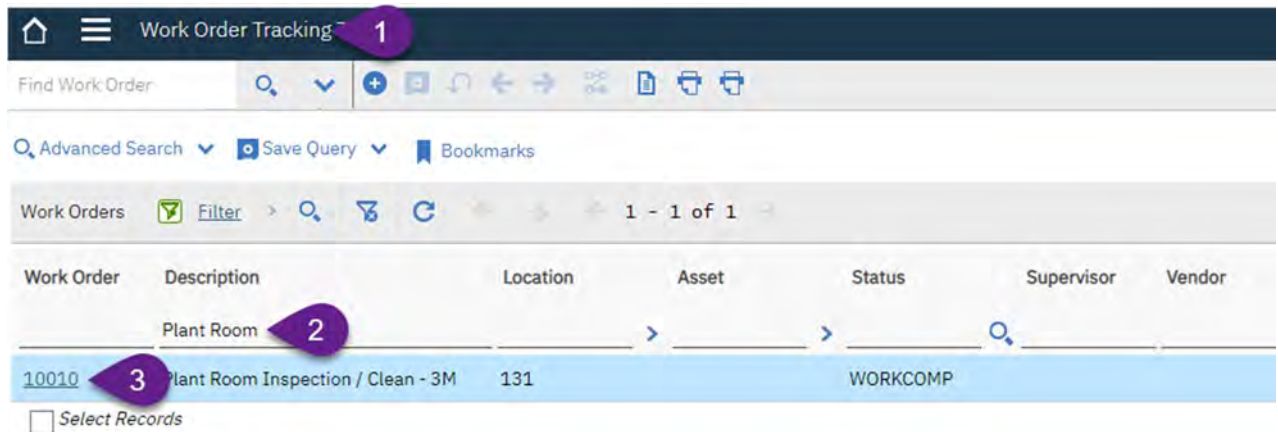


Figure 15 - Select Work Order for Follow up

4. From the More Actions menu select 'Create → Work Order'
5. Work Order will be duplicated. Review new work order.

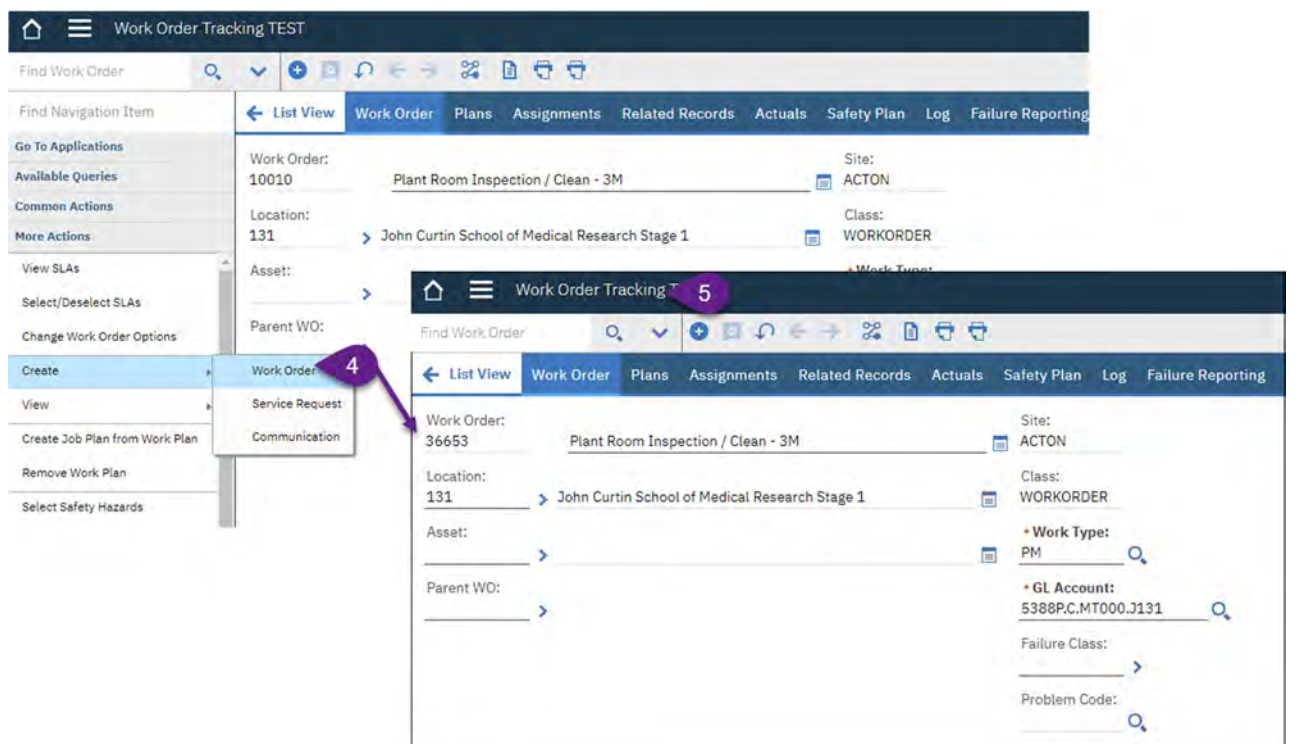
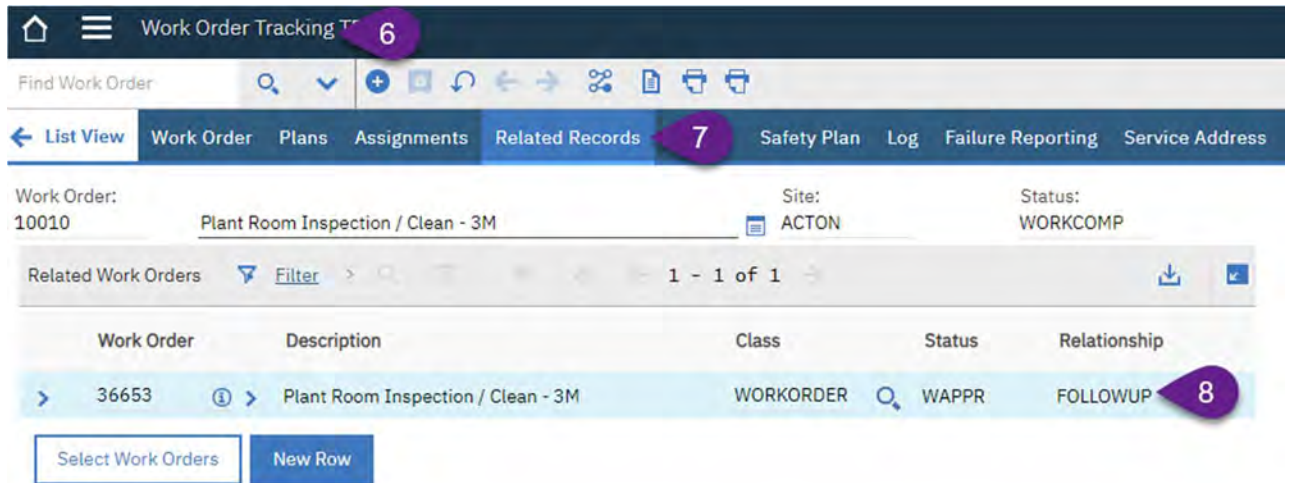


Figure 16 - Options while duplication Work Order

6. Go back to Originator WO,
7. Select Related Record tab
8. New Work Order will be listed as 'Follow-up' work order.



Work Order Tracking

Find Work Order

List View Work Order Plans Assignments **Related Records** Safety Plan Log Failure Reporting Service Address

Work Order: 10010 Plant Room Inspection / Clean - 3M Site: ACTON Status: WORKCOMP

Related Work Orders Filter 1 - 1 of 1

Work Order	Description	Class	Status	Relationship
36653	Plant Room Inspection / Clean - 3M	WORKORDER	WAPPR	FOLLOWUP

Select Work Orders New Row

Figure 17 - Follow up Work Order

Activity Name

Duplicate Work Order

9. From the Start Centre, go to the Work Order Tracking application:
Go To → Work Orders → Work Order Tracking
10. Enter search criteria and press 'Enter' to filter the Work Order list
11. Select the Work Order to be duplicated – this will open the record in the Work Order tab

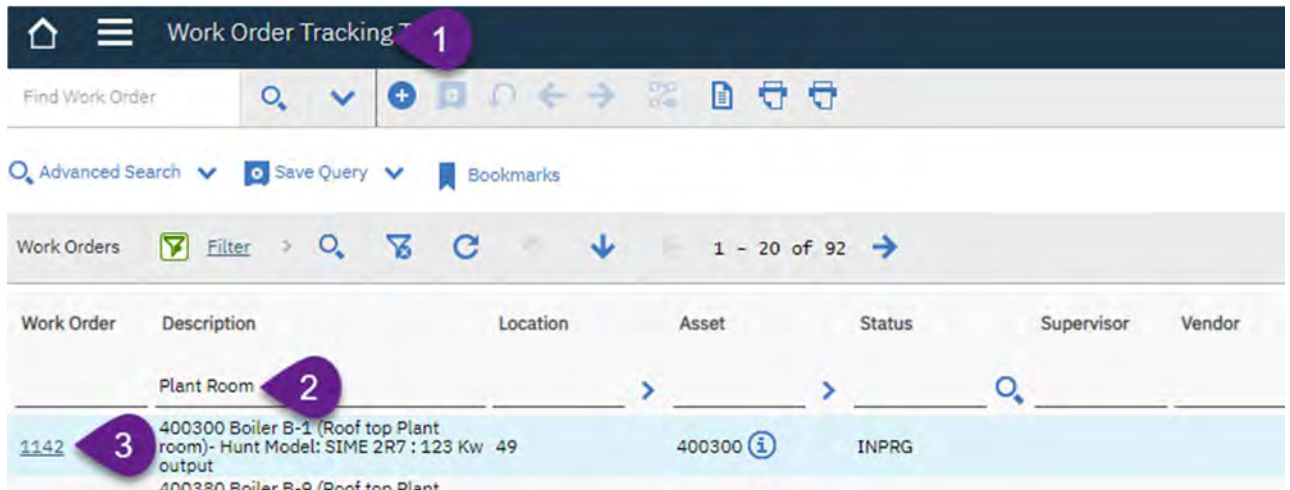


Figure 18 - Select Work Order for Duplication

12. From the More Actions menu select 'Duplicate Work Order'
13. Additional choice dialog will show up
14. Select option 'Duplicate Work Order with its Tasks'
15. Press the 'OK' button to accept the Option selected

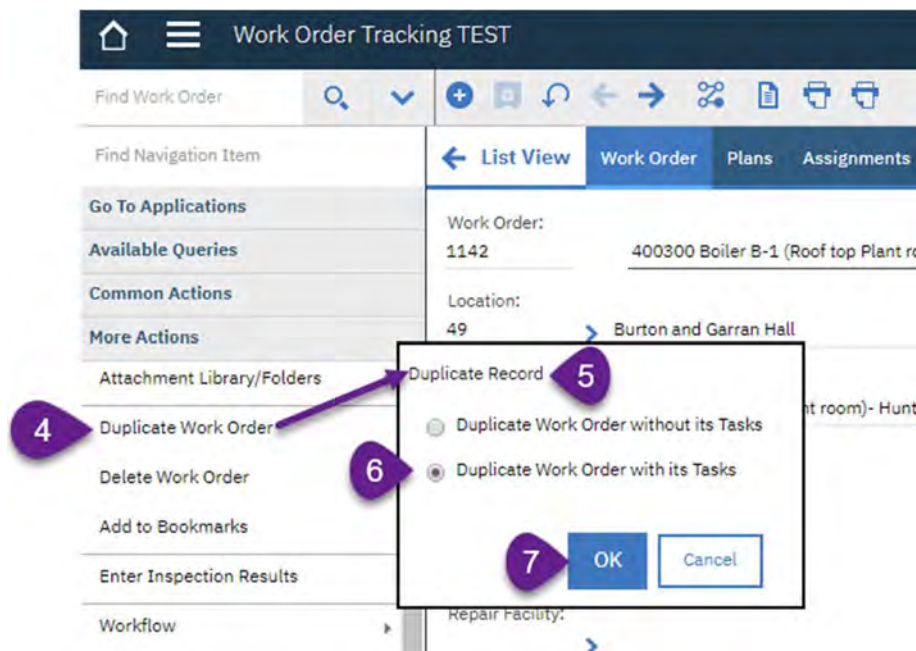
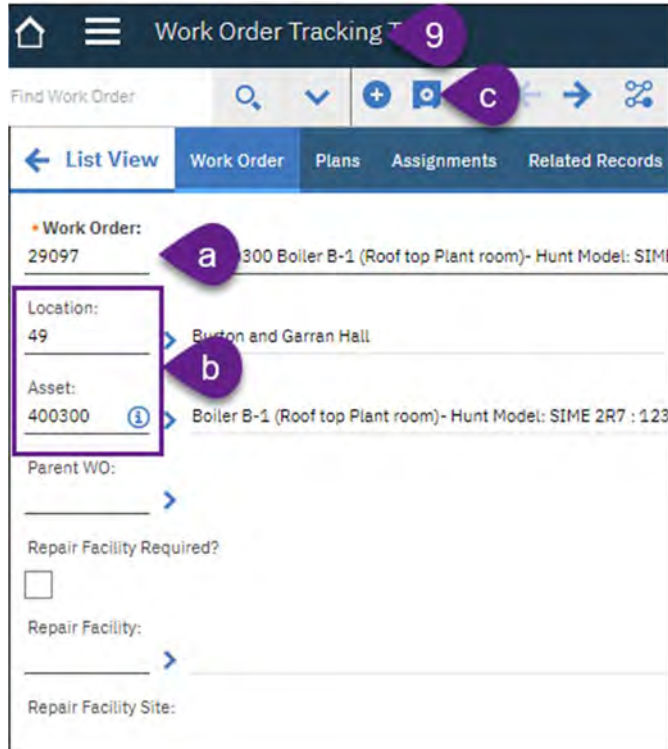


Figure 19 - Options while duplication Work Order

16. New Work Order record will be created

- This will create a new auto numbered work order in the work order tab
- Field like Asset, Location etc. remain editable and can be changed as required
- When changes are complete click the **'Save'** button



The screenshot displays the 'Work Order Tracking' interface. At the top, there is a search bar labeled 'Find Work Order' and a navigation bar with tabs: 'List View', 'Work Order', 'Plans', 'Assignments', and 'Related Records'. The 'Work Order' tab is active. Below the tabs, the form shows a duplicated work order entry. Callout 'a' points to the 'Work Order: 29097' field. Callout 'b' points to the 'Location: 49' field, which is highlighted with a red box. Callout 'c' points to the 'Save' button in the top right corner. The form also includes fields for 'Asset: 400300', 'Parent WO:', 'Repair Facility Required?' (with a checkbox), 'Repair Facility:', and 'Repair Facility Site:'.

Figure 20 - Duplicated Work Order to be modified

Activity Name

Change Work Order Status

Using Work Order Tracking the status of work orders can be changed. The common actions menu contains the following buttons for changing status:

- Change Status button or
- Approve Work Order button
- Initiate Work Order button
- Complete Work Order button
- Close Work Order button

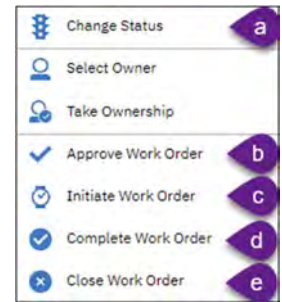


Figure 21 - WO Status Options

The **'Change Status'** button can be used to set valid work order status, based on business rules relating to previous status. A typical work order status flow is shown below. Other statuses are possible and will be determined during implementation.

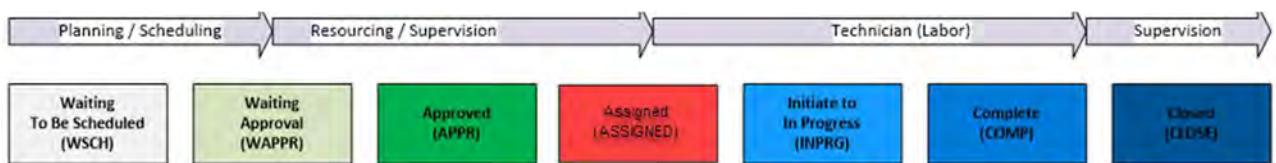


Figure 22 - Work Order Status Flow

The method of selecting work orders is the same for all situations where any individual work order that will be edited and its status changed.

- From the Start Centre, go to the Work Order Tracking application:
Go To → Work Orders → Work Order Tracking
- Enter search criteria and press **'Enter'** to filter the Work Order list
- Select the Work Order to change status – this will open the record in the Work Order tab

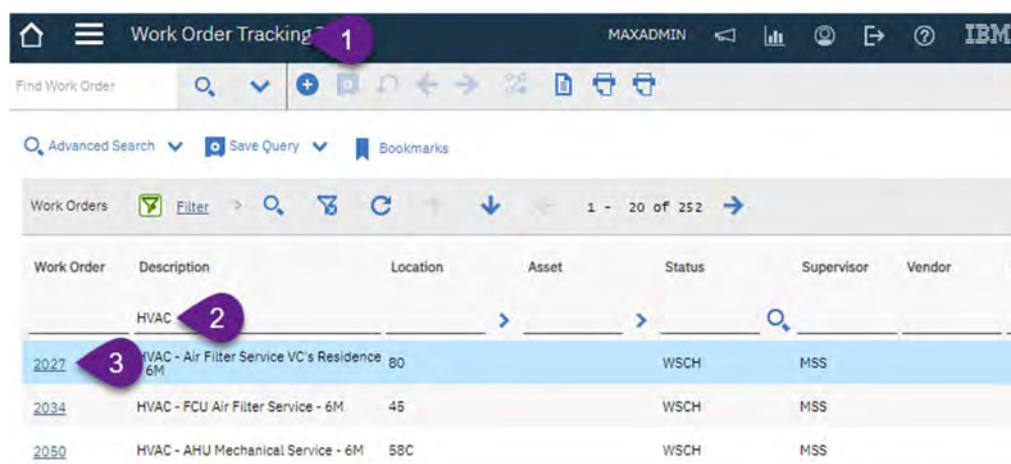


Figure 23 - Select Work Order for Status Change

4. Using the Change Status button, a **'Change Status'** dialog box will be displayed.
 - a) Select the required status from the list
 - b) Press the **'OK'** button.
 - c) Work Order status is changed, and Status Date is updated

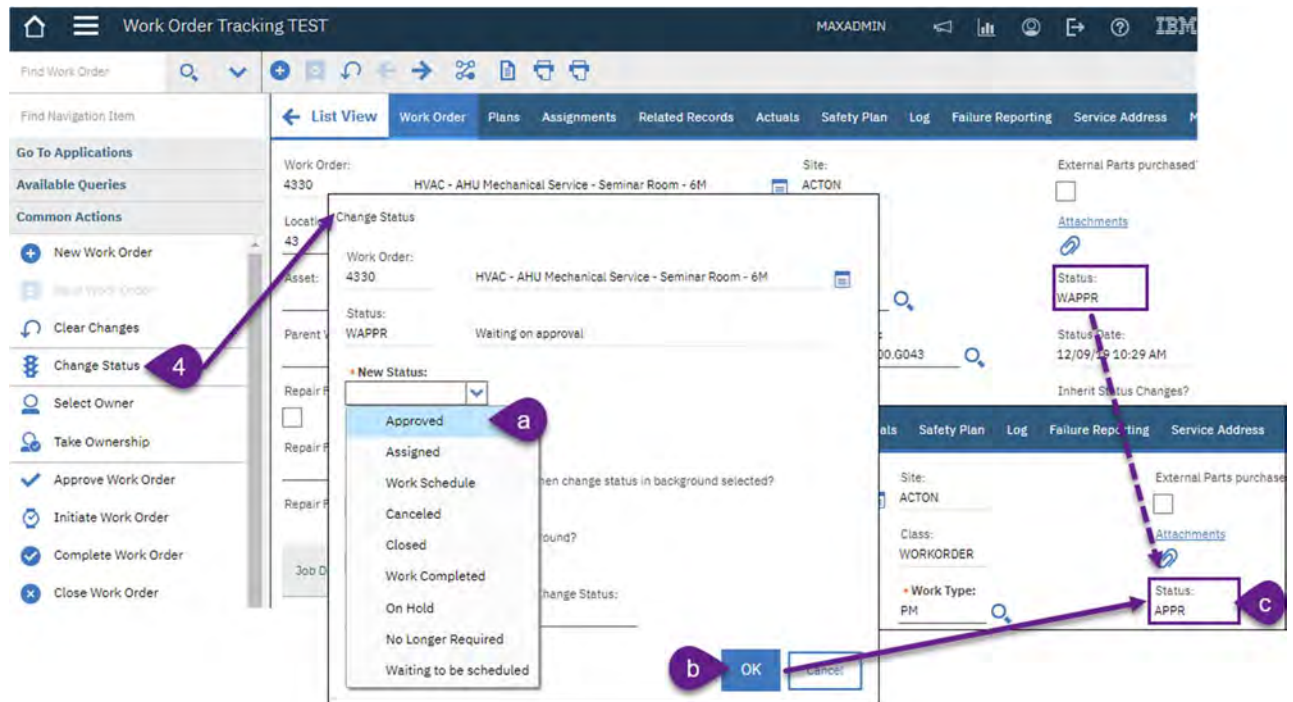


Figure 24 - Work Order Status Change Process

Change Work Order Status using Action buttons

5. Using other Change Status buttons (Approve/Initiate/Complete/Close) will change status in similar fashion.
 - a) Status in the list will be pre-selected
 - b) Synonyms of selected status will be available for selection
 - c) Press the **'OK'** button to confirm action.

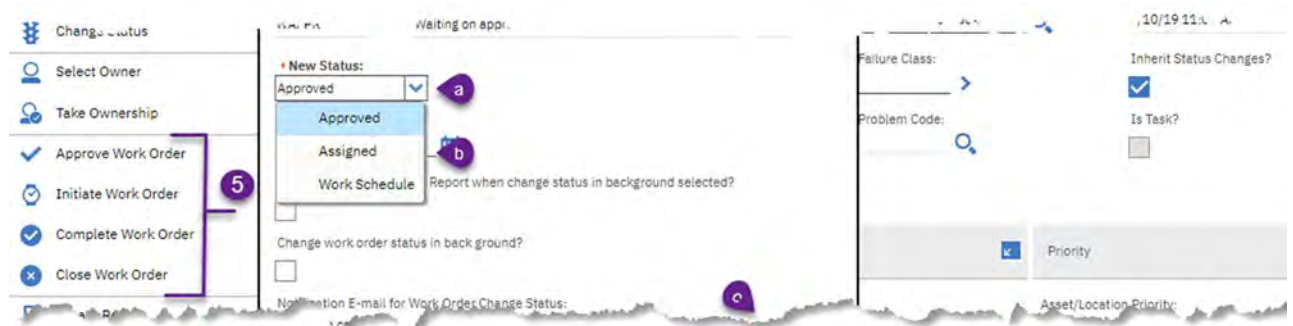


Figure 25 - Work Order Approval

Cancel Work Order

6. Work order can be cancelled using the Change Status button. **'Change Status'** dialog box will be displayed.
 - a) Select the **'Cancelled'** status from the list
 - b) Press the **'OK'** button.

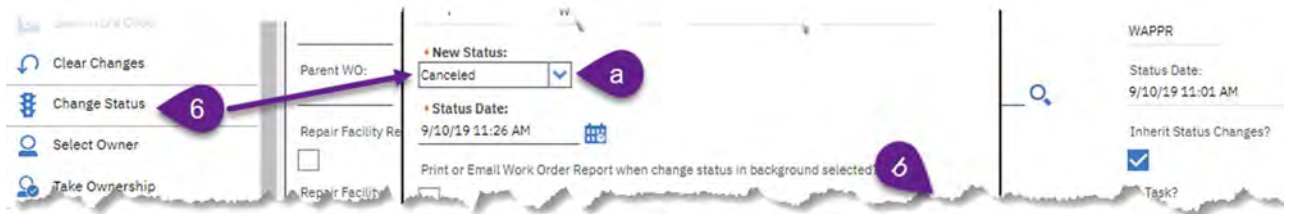


Figure 26 - Work Order Cancellation

Activity Name

Reporting Asset Downtime using Work Order Tracking

Asset downtime can be reported using the Work Order Tracking application. A work order for the asset must be opened and edited in work order tracking. There are two methods of reporting downtime via Work Order Tracking.

The first method is to toggle the status of the asset from UP to Down at commencement of the work and then toggle the status from Down to UP at the end of the work. The date and time of each entry is used to calculate the duration of the downtime.

The second method is to enter Downtime as a duration. This does not change the Up/Down status of the asset.

1. From the Start Centre, go to the Work Order Tracking application:
Go To → Work Orders → Work Order Tracking
2. Enter search criteria and press 'Enter' to filter the Work Order list
3. From the List View results select the work order to be edited – this will open the work order

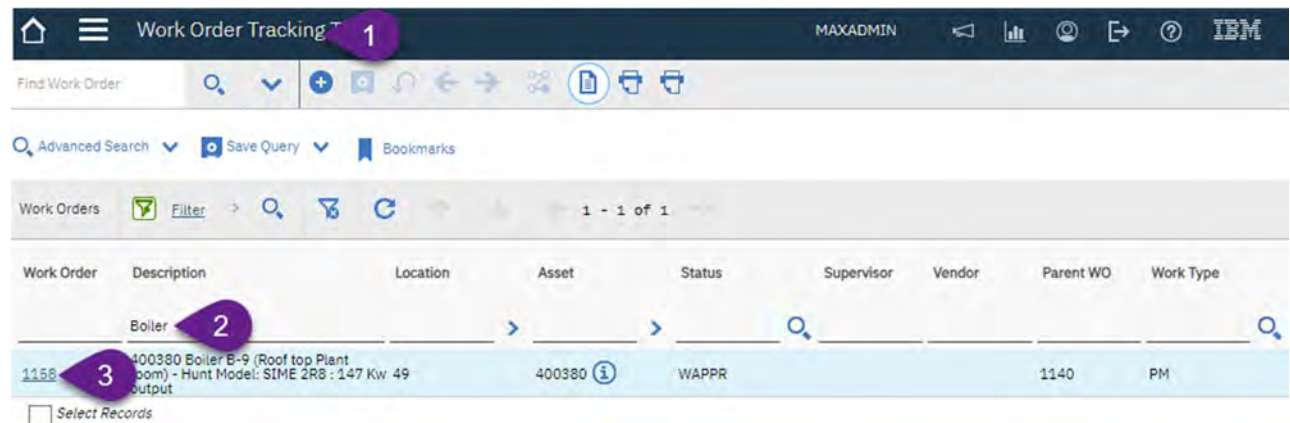


Figure 27 - Work Order Selection

Method One – Toggle Status

4. From the More Actions Menu select **'Report Downtime'** (toggle Up to Down):
 - a) Note the asset current status (Up or Down)
 - b) In the **'Change Status'** option, enter date and time for the which downtime commenced
 - c) Select a downtime code which applies to the asset
 - d) Select a Downtime Type for the asset of either **'Operational'** or **'Non-Operational'**.
 - e) Press the **'OK'** button
5. From the More Actions Menu select **'Report Downtime'** (toggle Down to Up):
 - a) Note the asset current status (Up or Down)
 - b) In the **'Change Status'** option, enter date and time for the which downtime finished
 - c) Select a downtime code which applies to the asset
 - d) Select a Downtime Type for the asset of either **'Operational'** or **'Non-Operational'**.
 - e) Press the **'OK'** button

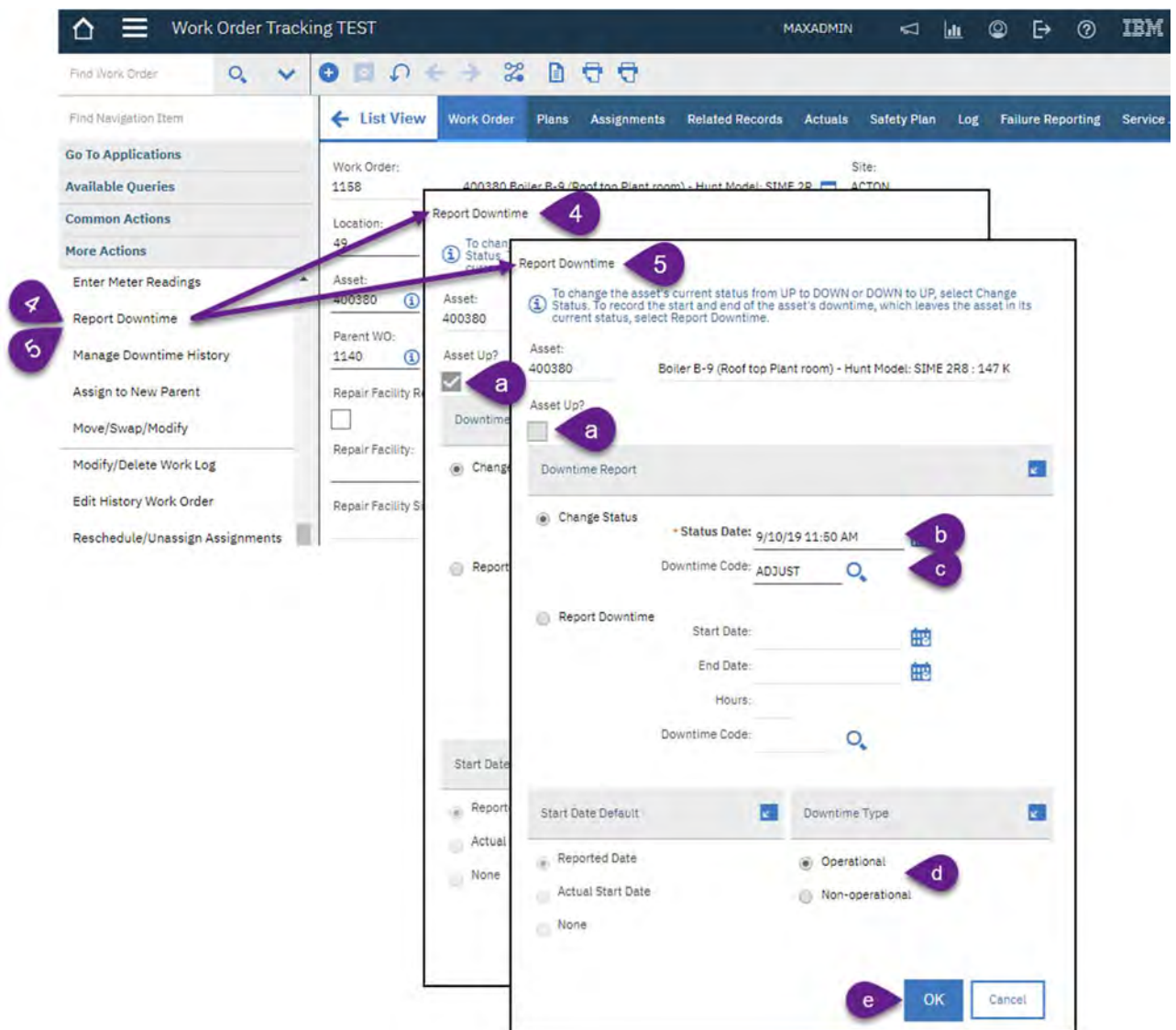
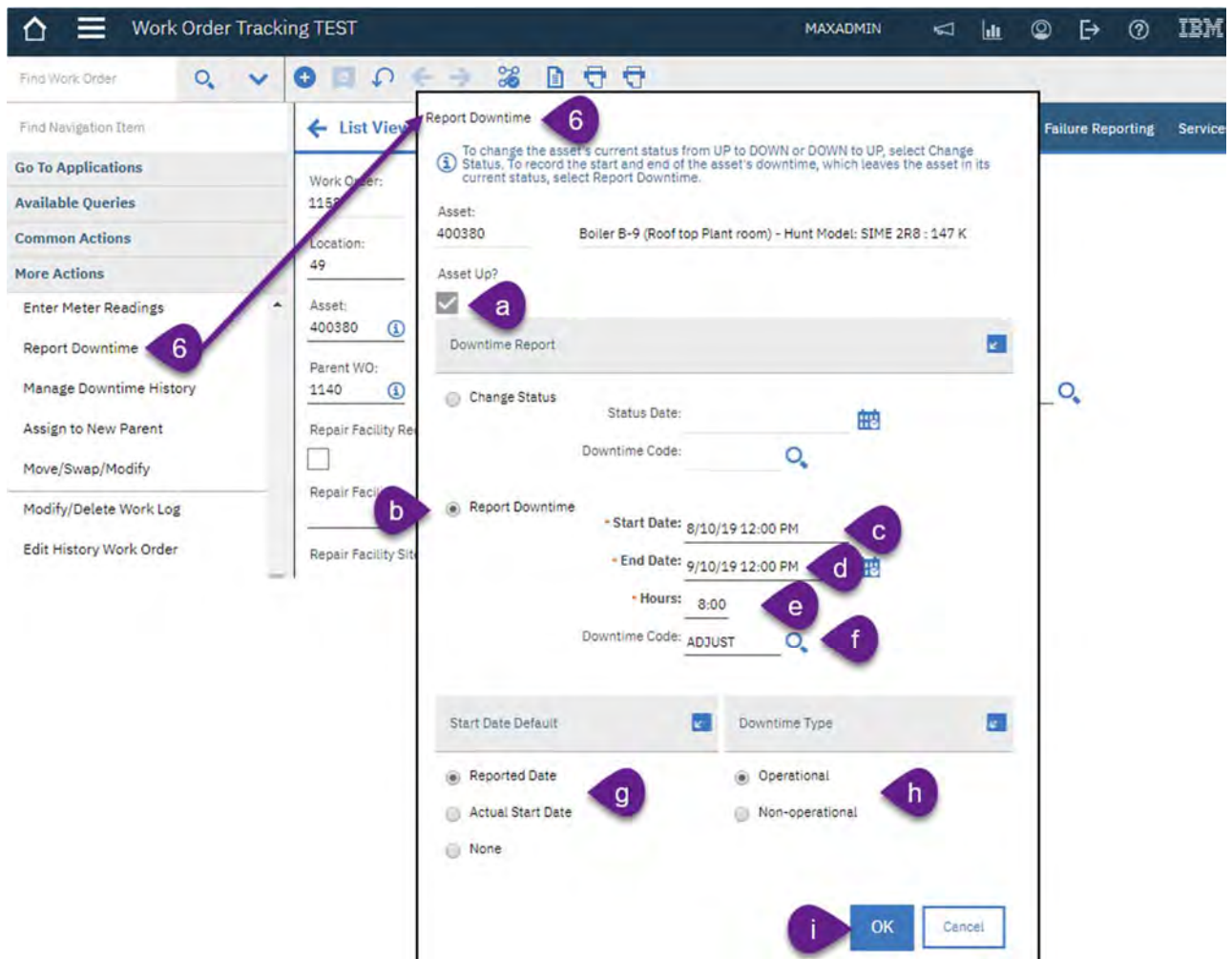


Figure 28 - Reporting Asset Downtime with WO Status Change

Method Two – No Change to status – report downtime start/end

6. From the More Actions Menu select **'Report Downtime'**:
 - a) Note Asset Status
 - b) Select the **'Report Downtime'** option
 - c) Enter Start Date and Time
 - d) Enter End Date and Time
 - e) The hours are automatically calculated as the difference between Start and End times
 - f) Select a downtime code which applies to the asset
 - g) Select a Start Date default for the asset of either **'Reported Date'**, **'Actual Start Date'** or **'None'**.
 - h) Select a Downtime Type for the asset of either **'Operational'** or **'Non-Operational'**.
 - i) Press the **'OK'** button



The screenshot shows the 'Report Downtime' dialog box in the Maximo Work Order Tracking application. The dialog is titled 'Report Downtime' and contains the following fields and options:

- Asset:** 400380
- Location:** 49
- Parent WO:** 1140
- Asset Up?** ☒ (a)
- Change Status:** Status Date: [calendar icon], Downtime Code: [search icon]
- Report Downtime:**
 - Start Date:** 8/10/19 12:00 PM (c)
 - End Date:** 9/10/19 12:00 PM (d)
 - Hours:** 8:00 (e)
 - Downtime Code:** ADJUST (f)
- Start Date Default:** ☒ Reported Date (g), ☐ Actual Start Date, ☐ None
- Downtime Type:** ☒ Operational (h), ☐ Non-operational
- Buttons:** OK (i), Cancel

Figure 29 - Reporting Asset Downtime without WO Status Change

7. The reported downtime can be viewed in the Asset application and
8. Select **'Manage Downtime History'** from the **'More Actions'** menu

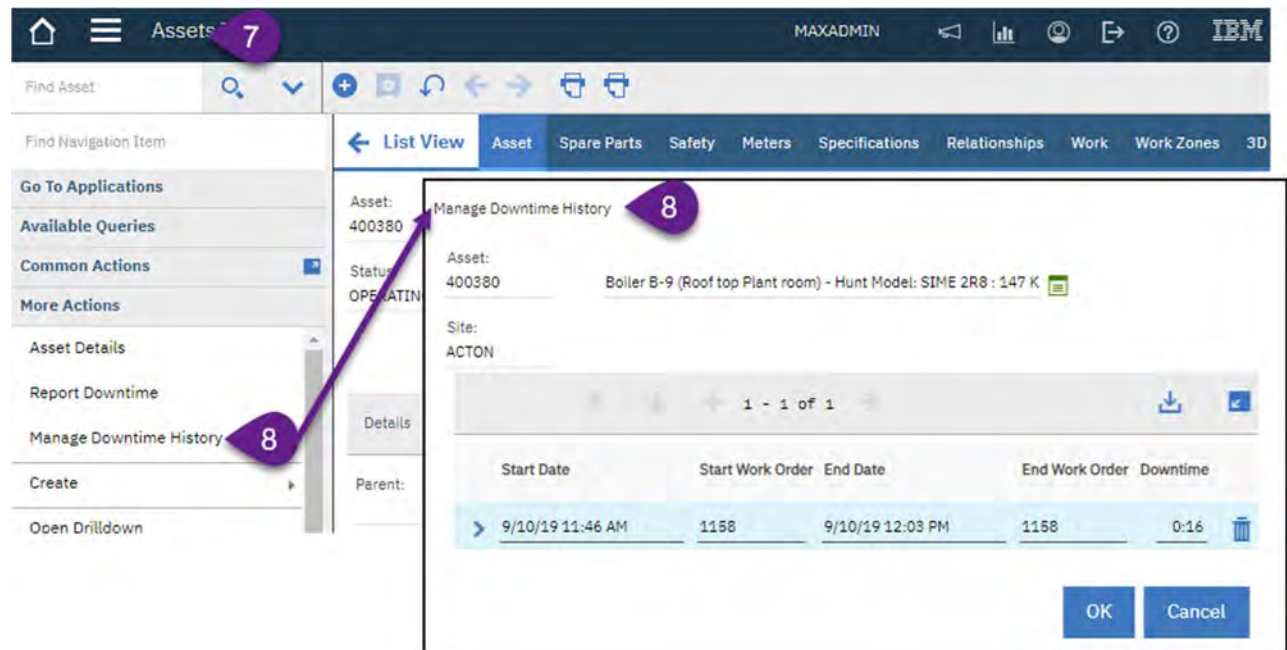


Figure 30 - Manage Downtime History on Asset

Activity Name

Work Order Reporting

The process for running an existing Maximo report is the same in all Maximo Applications that have predefined reports. Reports in Maximo are explained in detail in **Unit 1, Lesson 3, BIRT Reporting Functions**.

Work Order Report using List View Results

Many Maximo reports are designed to use the search results displayed in the application list view. When the report is run while the List View tab is selected the report will return results for all found records

1. From the Start Centre, go to the Work Order Tracking application:
Go To → Work Orders → Work Order Tracking
2. Enter search criteria and press **'Enter'** to filter the Work Order list
3. From the More Actions menu select **'Run Reports'** – this will open the Reports and Schedules Dialog box
4. Select the desired report – this will open the reports **'Request Page'** dialog box
5. By default, the report will run immediately in a new browser window or tab when you Click the **'Submit'** button

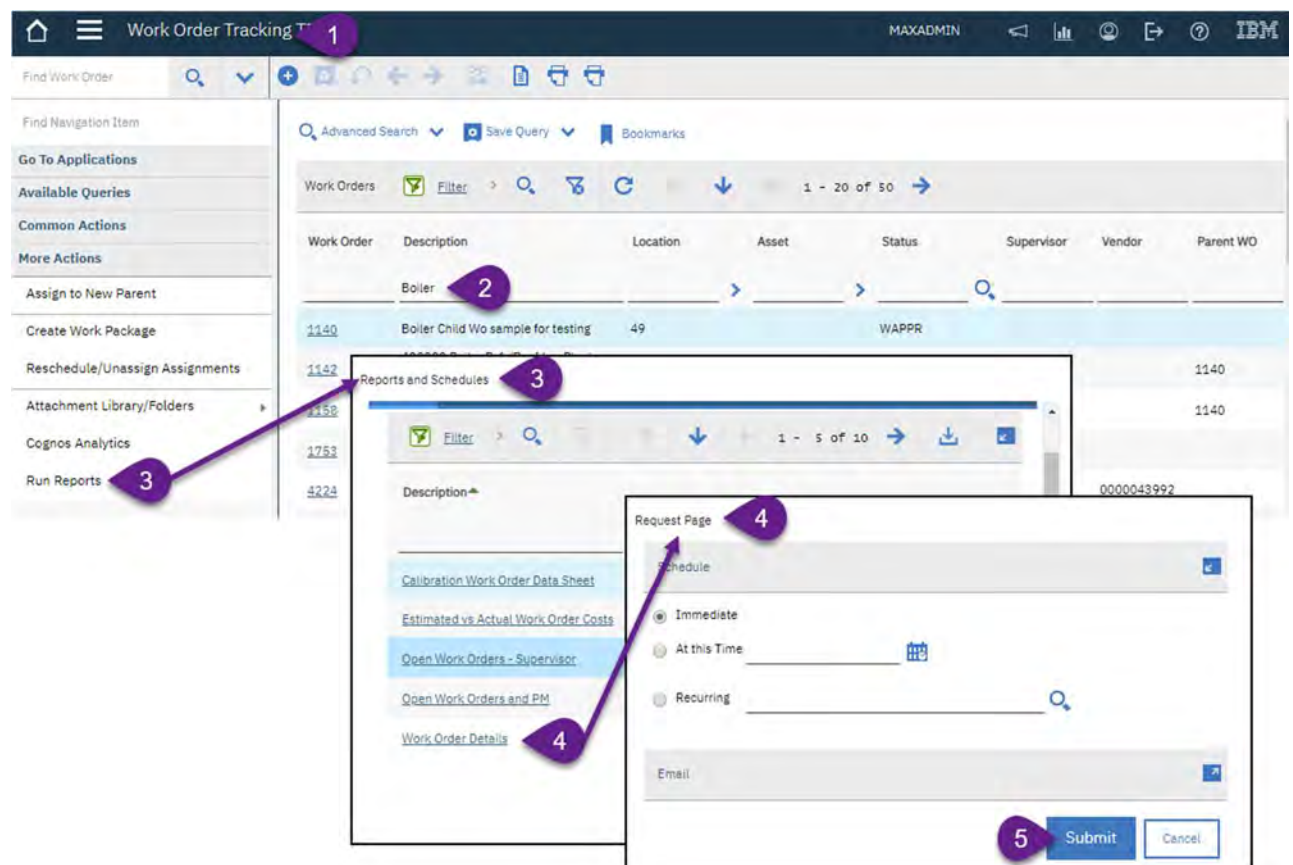


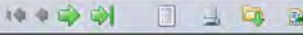
Figure 31 - Work Order Reporting


- The report is displayed for the records shown in the list view. Note there is at least one page per record displayed by the report.

Reporting

IBM.

Page 1 of 2





Work Order Details

2019-10-09 12:17:57.745

6

The Australian National University

Work Order Report

PLEASE CHECK WITH CONTACT OFFICER BEFORE YOU START AND REPORT TO CONTACT OFFICER WHEN YOU COMPLETE

Work Order 1140

Location: 49

Asbestos Present

Classification:

Assets:

Report Date: 2/07/19

Reported By: ANUTEST01

Parent:

GL Account: 5388C.C.MT000.F049

Supervisor:

Boiler Child Wo sample for testing

Burton and Garran Hall

Priority: 6

Risk Assessment:

Warranty Exp Date

Sched Start:

Sched Finish:

PM Number 1004

Contact Number

Service Contractor

Orig Record

Work Type PM

Craft Group

Description

Job Plan:

Job Plan Number

Job Plan Description

TEST

test

Sequence

Task

Description

Duration

10

test1

0

Sequence

Task

Description

Duration

10

test1

0

Planned Labor

Task ID

Craft

Skill Level

Labor

Vendor

Contract

Qty

Hours

Rate

Line Cost

ELEC

GRADE01

1

00:00

28.00

0.00

Total Planned Labor:

0.00

Related Records

WO

Description

Class

Status

Relationship

1753

Boiler Child Wo sample for testing

WORKORDER

WAPPR

FOLLOWUP

9/10/19 12:17 PM

1 / 2

Figure 32 - Work Order Details Report

Activity Name

Record Actuals and Complete CM/EM Work Order

1. From the Start Centre, go to the Work Order Tracking application:
Go To → Work Orders → Work Order Tracking
2. Enter search criteria and press 'Enter' to filter the Work Order list
3. From the List View results select the work order for update – this will open the work order

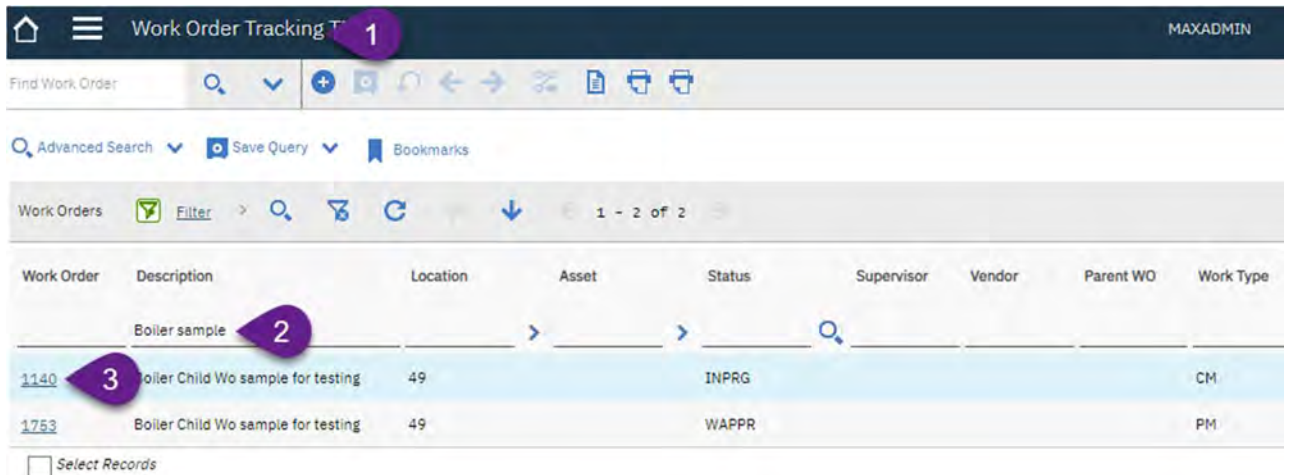


Figure 33 - Work Order Selection for recording actuals

4. The WO details will be displayed. Select the Actuals Tab

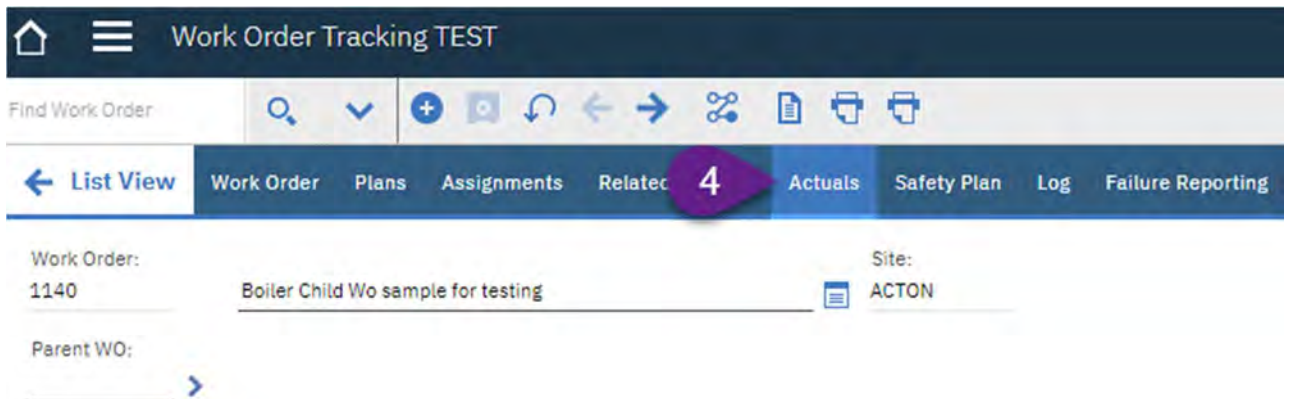


Figure 34 - Work Order Actuals Tab

Enter Actual Labor

On the Labor tab, the labor actuals can be entered by clicking the **'New Row'** button or **'Select Planned Labor'** button.

Note: Once the work order is saved the labour transaction(s) will be approved and cannot be deleted. Users should take care to ensure these entries are correct.

5. Using the **'Select Planned Labor'** button, create the labor records:

- Select the Labor Records being entered
- Click **'OK'** button

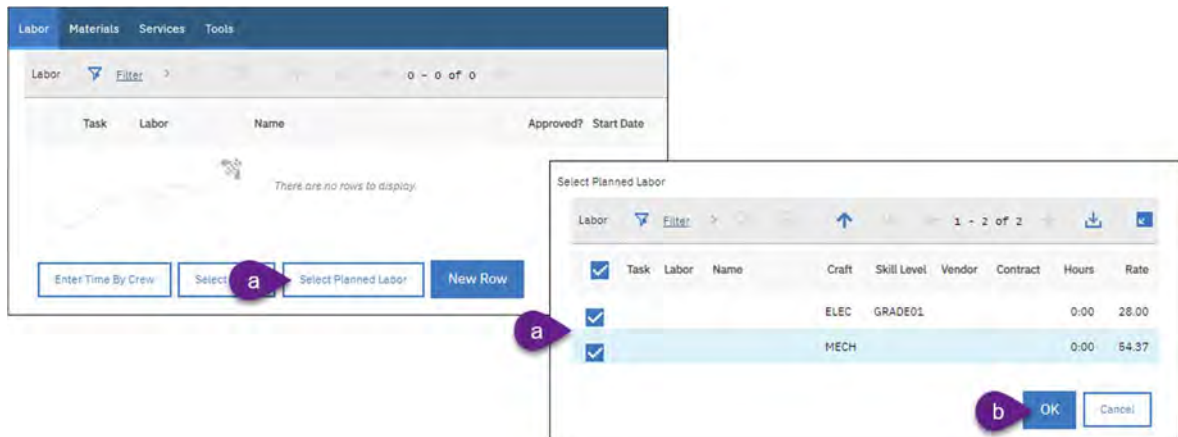


Figure 35 - Populating actual labor, based on planned crafts

- For each of the selected planned labor records a new row will be created populated with the planned craft, skill and regular hours
- To select the labor code – click on the chevron beside the labor field and then click **'Select Value'**
A list of labor codes is displayed for the planned craft and skill
- Select the correct labor code
- Repeat for each planned labor record

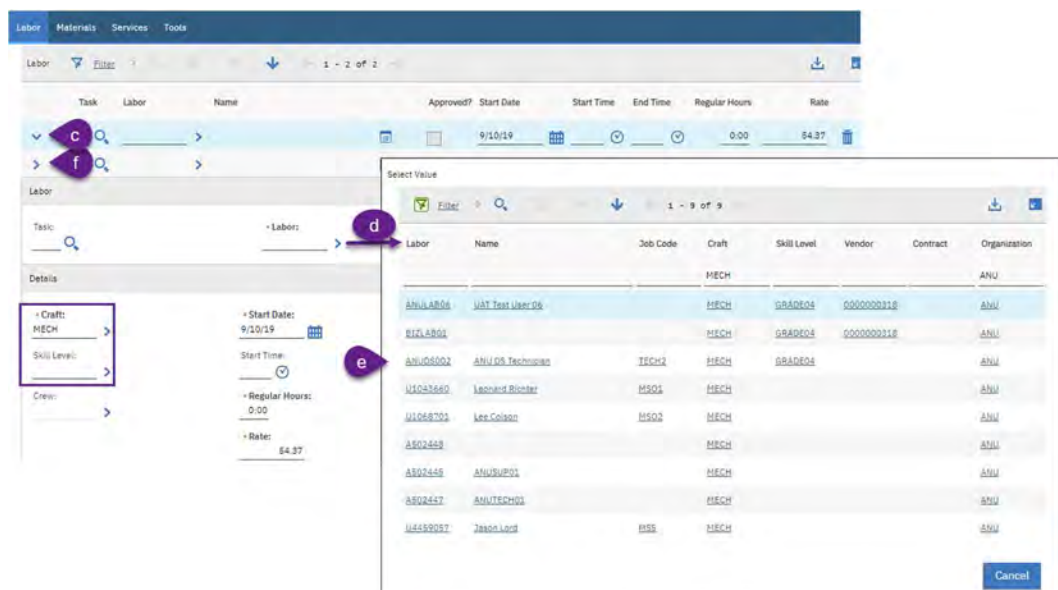
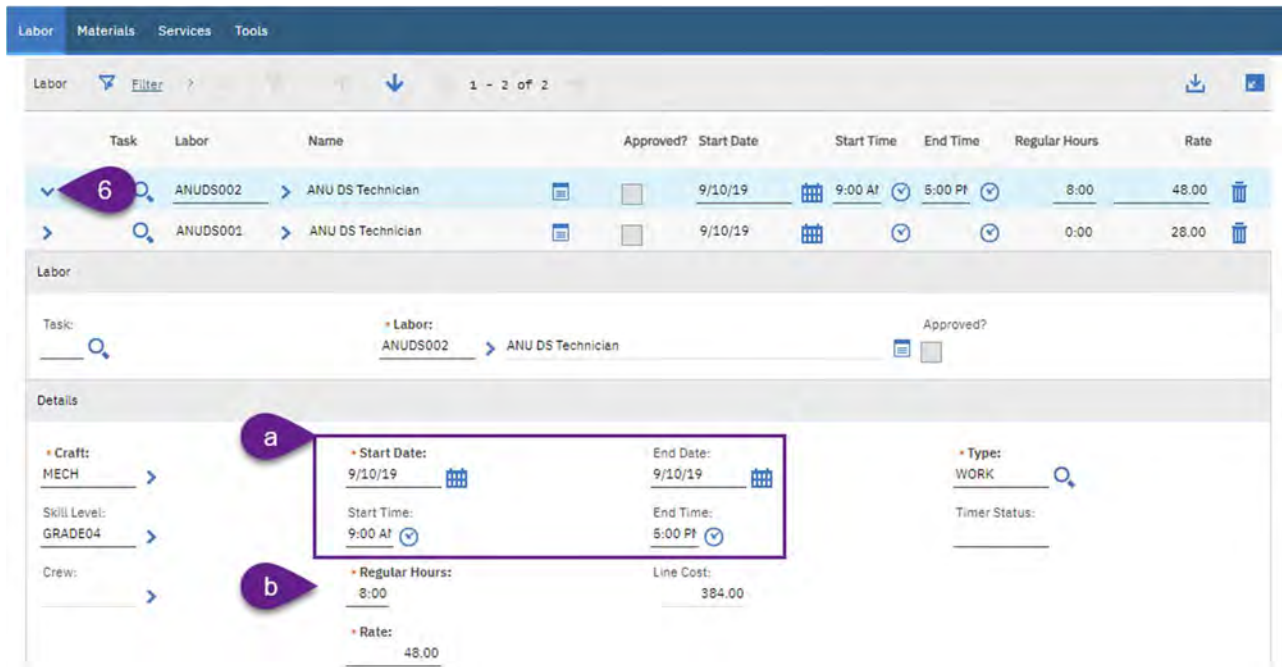


Figure 36 - Adding actual labor to planned crafts

6. By default, the planned regular hours are copied to each labor records. These can be modified before the work order is saved.
 - a) Enter Actual Start and End dates and Actual Start and End times for each labor record. These may be different to the Work Order Start and End dates.
 - b) When a start and end times are entered the regular hours duration will automatically be calculated.



The screenshot displays the 'Labor' tab in the BPD Zenith system. At the top, there's a navigation bar with 'Labor', 'Materials', 'Services', and 'Tools'. Below it, a table lists labor records. The first record is highlighted with a purple circle and the number '6'. This record has the following details:

Task	Labor	Name	Approved?	Start Date	Start Time	End Time	Regular Hours	Rate
ANUDS002	ANU DS Technician	<input type="checkbox"/>	9/10/19	9:00 AM	5:00 PM	8:00	48.00	
ANUDS001	ANU DS Technician	<input type="checkbox"/>	9/10/19			0:00	28.00	

Below the table, the 'Details' section for the selected labor record is shown. It includes fields for 'Craft' (MECH), 'Skill Level' (GRADE04), 'Crew', 'Start Date' (9/10/19), 'End Date' (9/10/19), 'Start Time' (9:00 AM), 'End Time' (5:00 PM), 'Regular Hours' (8:00), 'Line Cost' (384.00), and 'Rate' (48.00). Annotations 'a' and 'b' point to the date and time fields respectively.

Figure 37 - Modifying Actual labor dates

Enter Actual Materials

Materials will not be used in ANU.

Complete Work Order

When all the actual labour (and materials) have been entered and the job is finished, the work order status can be changed to **'Complete'**.

7. Using the **'Complete Work Order'** button:
 - a) **'Change Status'** dialog box will be displayed.
 - b) The Completed (COMP) status is already selected
 - c) Press the **'OK'** button.
 - d) Work Order status is changed, and Status Date is updated

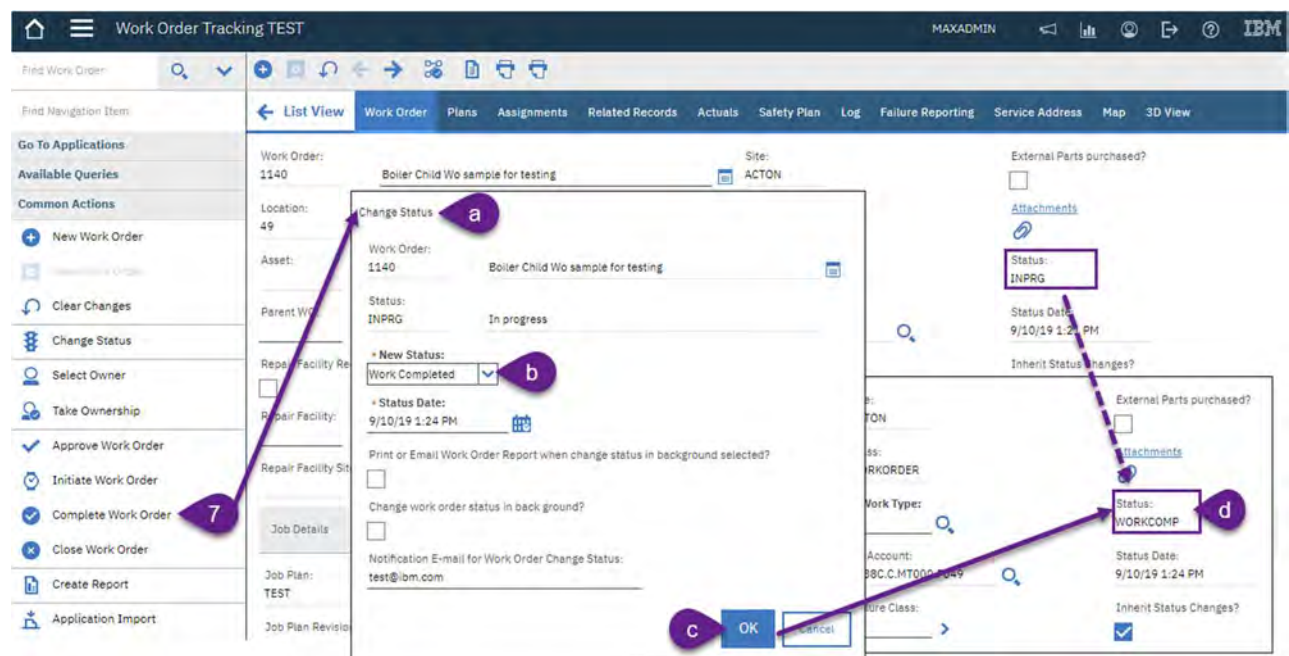


Figure 38 - Completing Work Order through Status Change

Lesson 2: Work Orders, ANU Business Process

Work Order represent set of data related to portion of work that needs to be executed on asset or location.

PM/EM/RM Workorders are created from SR, with assigned Supervisor. Supervisor review work orders, assigned Technicians, approve work and follow up work order execution.

Actual Work can be done by Internal Field Staff (Technicians), or by contractor. Based on this, WF process can be split into two types:

1. Actual field work is done by Technicians. Work is records by Technicians, using Datasplice as mobile application, on mobile device. See [Figure 35](#) below.
2. Actual field work is done by Contractors. All work is recorded by Supervisors. See [Figure 36](#) below.

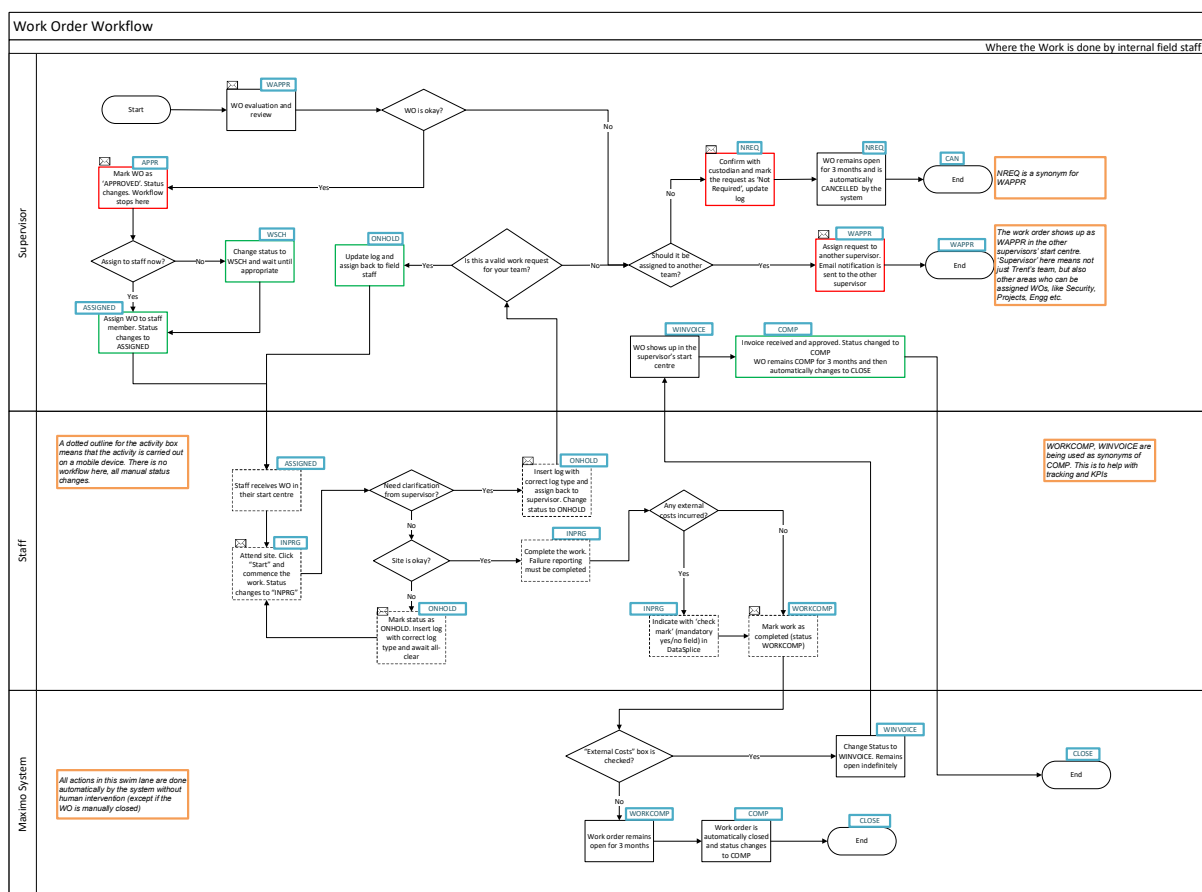


Figure 39 - Work Order Workflow Process, work done by Technicians

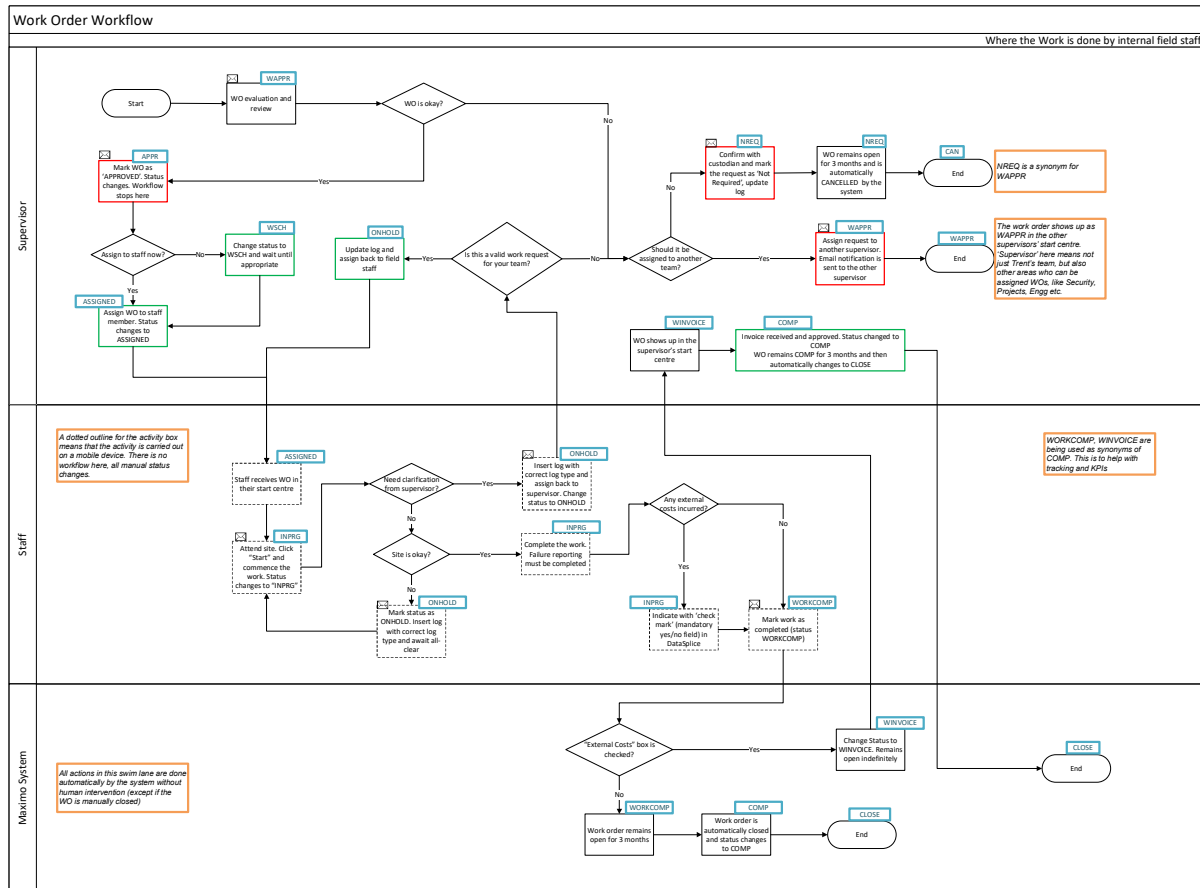


Figure 40 - Work Order Workflow Process, work done by Contractors

KEY ASSUMPTIONS

- User can log into Maximo and has security privilege to view and modify Work Orders
- User can log into DataSplice and has security privilege to view and modify Work Orders

USER ACTIVITIES

Activity Name

(Supervisors) Approving and Assigning Work Order

1. From the Start Centre, go to the **Work Order Tracking** application:

Go To → Work Orders → Work Order Tracking

... Or

Start Center → Favorite Applications Work Order Tracking



Figure 41 - Path to the Work Order

2. Select list of WOs from '**Available Queries**' by choosing '**Supervisors WAPPR Workorders**'
3. Enter additional search criteria and press '**Enter**' to filter the Work Order list
4. Select WO to be reviewed

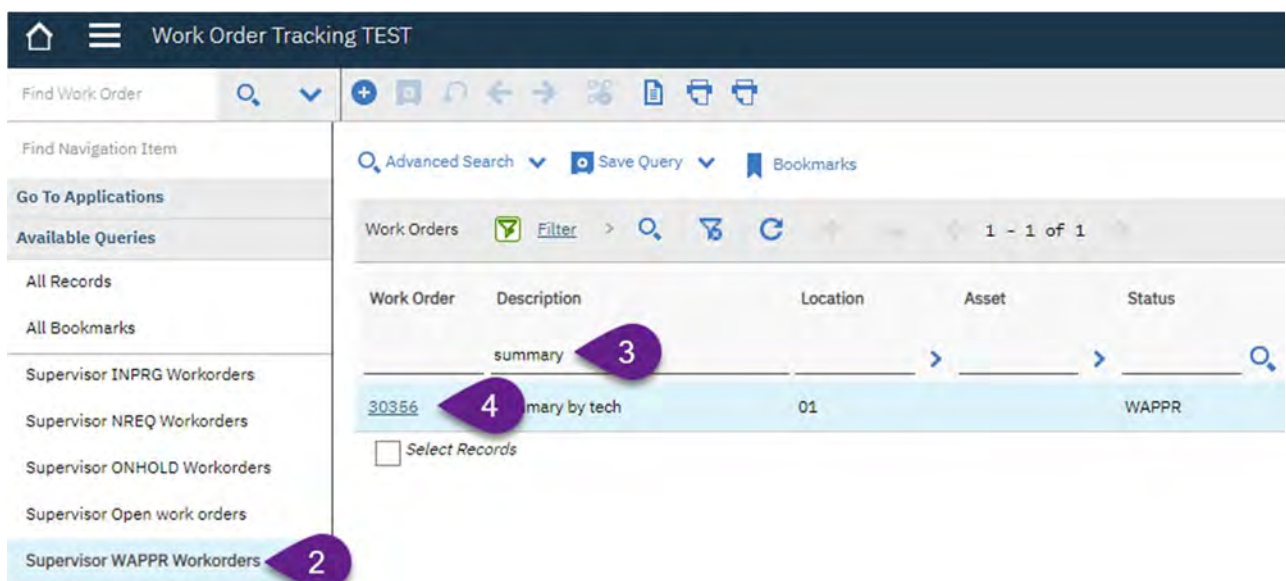


Figure 42 - Selecting WO for review

.. Or ...

5. From the Start Centre

- Find all WOs assigned to Supervisor in Inbox/Assignment Portlet
- Find all WOs waiting for approval in separate Portlet
- Filter WO list to find WO
- Click on WO

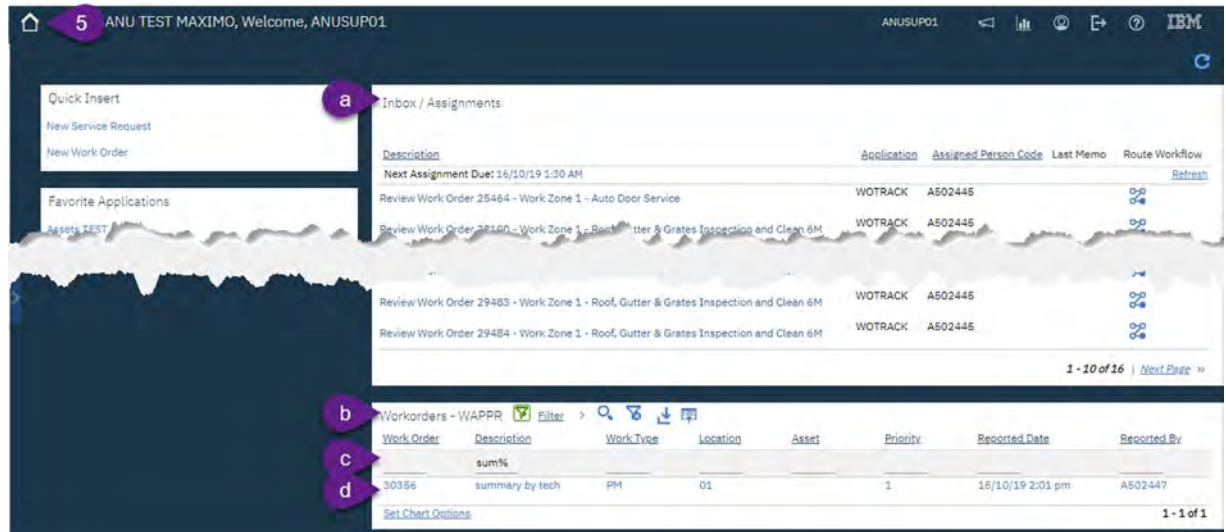


Figure 43 - Accessing WO through Start Center

- WOs assigned to Supervisor will be in WAPPR status.
- Review record and add/modify all relevant data for the record

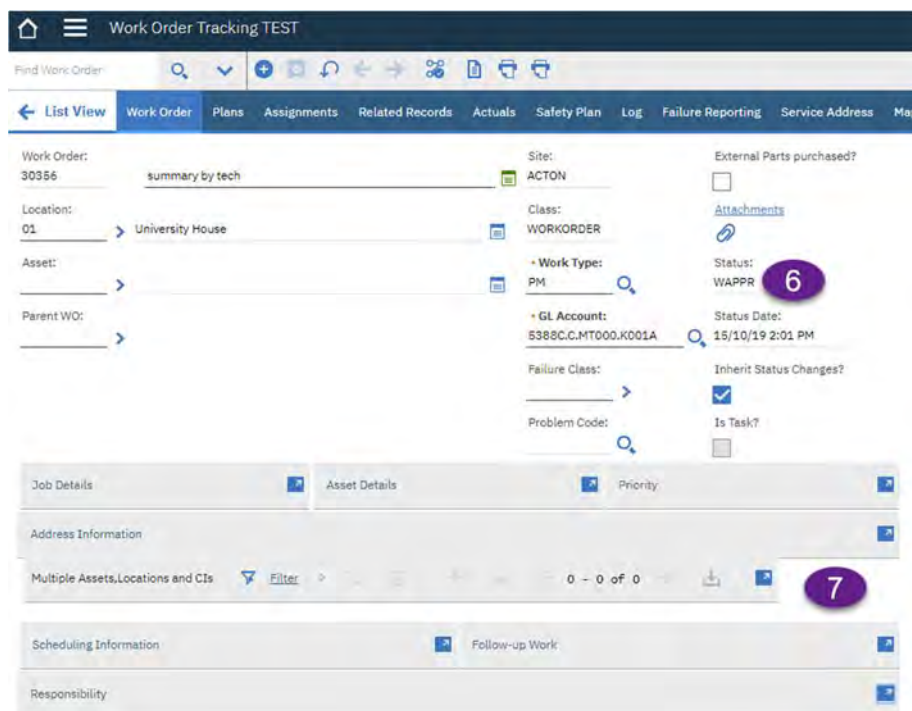


Figure 44 - Work Order Review

8. Click on **'Route Workflow'** button. Dialog will pop up. Available options are:
 - a) **'Approve Work Order'** – work order will be approved.
 - b) **'Assign to Another Supervisor'** – we are back at the beginning of the lesson as another Supervisor
 - c) **'Work no Longer Required'** – work order will be cancelled

Choose option a).

- d) Click **'OK'** button.

9. Notice change of the work order status to APPR.

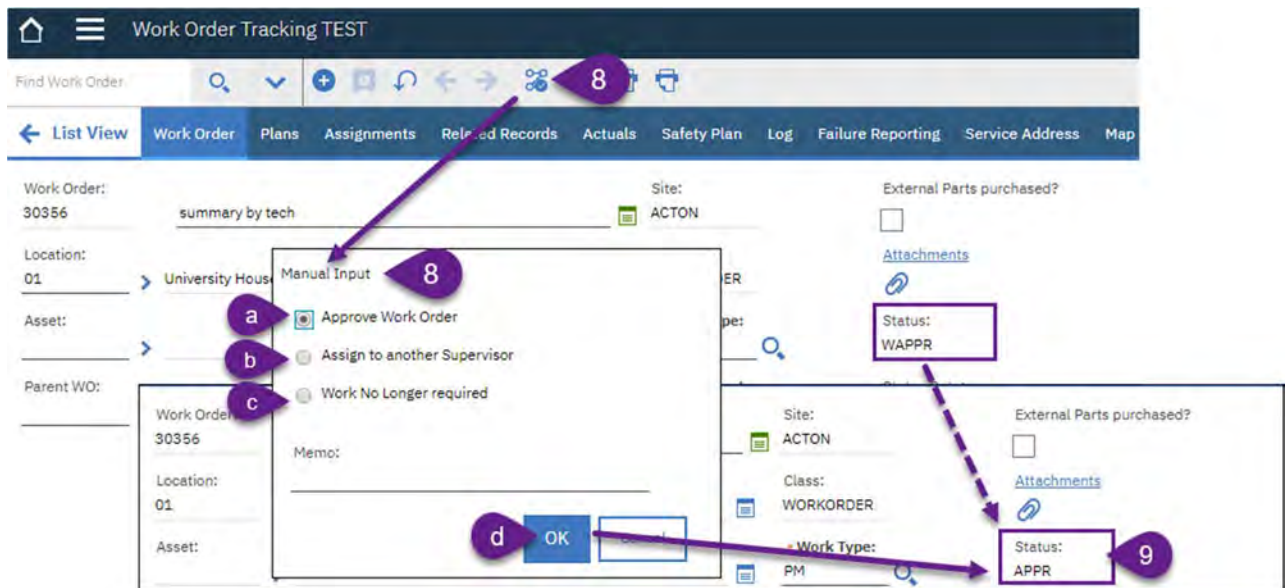


Figure 45 - Work Order Approval Process

Depending on case, Work Order can be assigned to **(Option 1)** Technician or **(Option 2)** Contractor

Option 1: Assigning Work Order to Technician

10. Go to Assignments Tab

- Select 'New Row' in 'Assignments' table
- Select labor Menu. Labor Dialog will pop up.
- Filter out labor records
- Select appropriate labor

11. Save Work Order Record

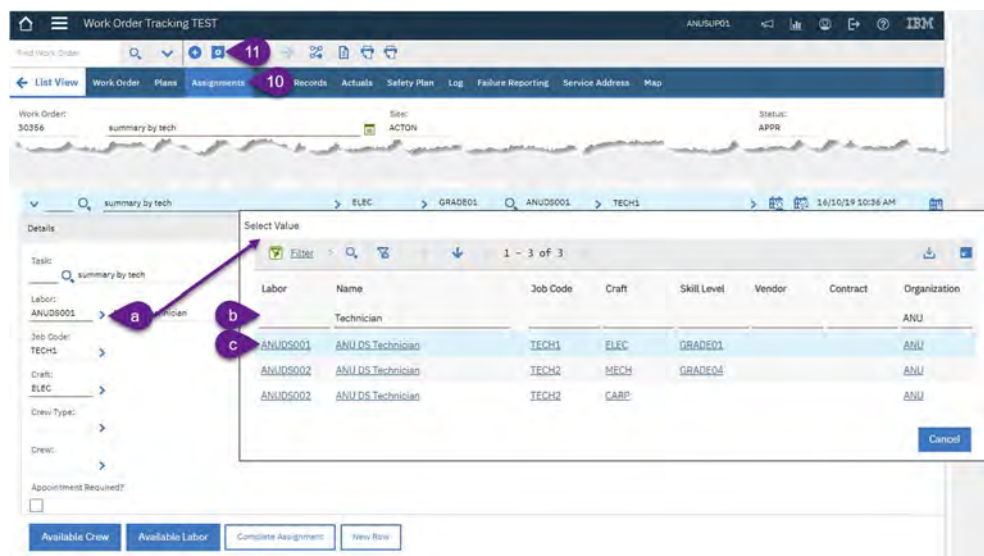


Figure 46 - Work Order, Assignment to Technician

12. Notice that Work Order changed status to Assigned through background escalation

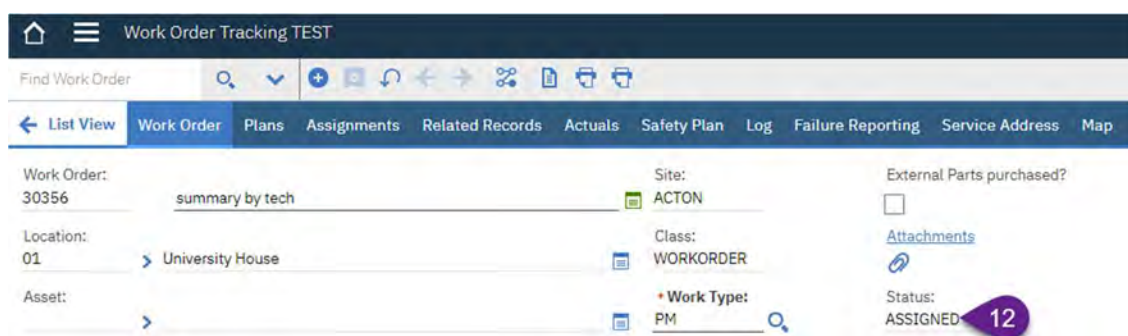


Figure 47 - Work Order Status Change to 'Assigned'

Option 2: Assigning Work Order to Contractor

10. Go to Main Work Order Tab
11. Scroll down to Responsibility Section. Find Vendor Field.
 - a) Select Menu next to the Vendor Field. Dialog with list of vendors will pop up
 - b) Apply filter to selection
 - c) Select vendor
12. Click 'Save' Button

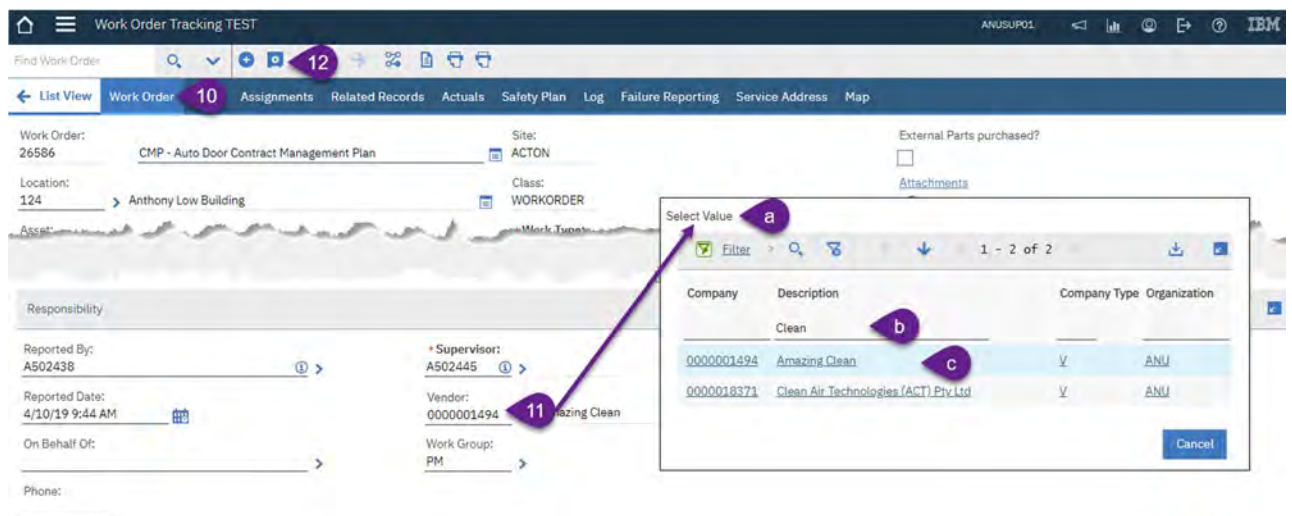


Figure 48 - Assigning Work Order to Contractor

13. Using the Change Status button, a **'Change Status'** dialog box will be displayed.

- d) Select the required status from the list
- e) Press the **'OK'** button.
- f) Work Order status is changed, and Status Date is updated

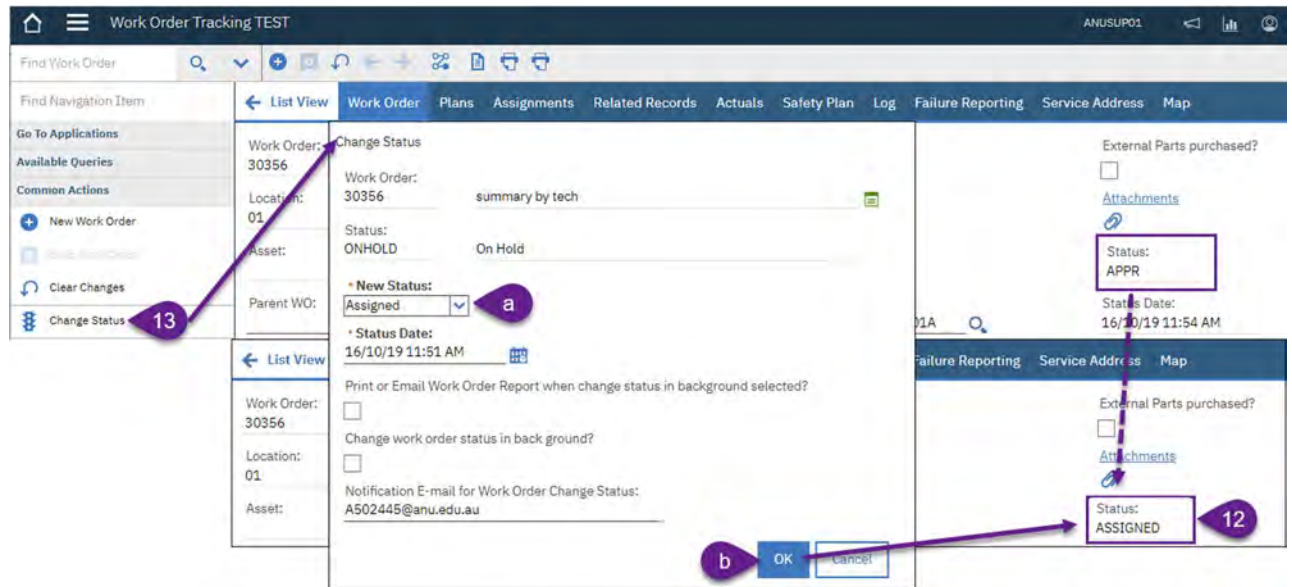


Figure 49 - Work Order Contractor Process, Manual Status Change

14. Maximo will Auto send dispatch email to vendor with Workorder report and copy supervisor in CC and change Workorder status to INPRG

Activity Name

(Supervisors) Managing on Hold Work Orders

1. From the Start Centre, go to the **Work Order Tracking** application:

Go To → Work Orders → Work Order Tracking

... Or

Start Center → Favorite Applications Work Order Tracking

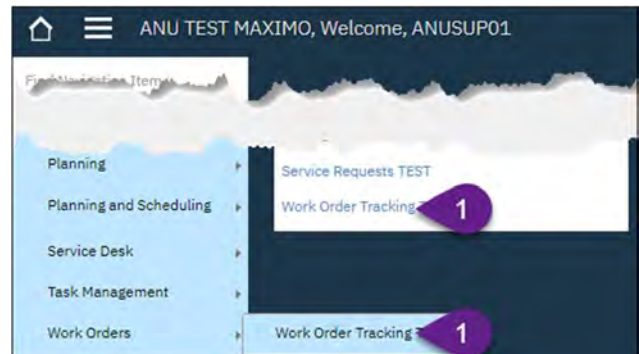


Figure 50 - Path to the WO

2. Select list of WOs from 'Available Queries' by choosing 'Supervisors ONHOLD Workorders'
3. Enter additional search criteria and press 'Enter' to filter the Work Order list
4. Select WO to be reviewed

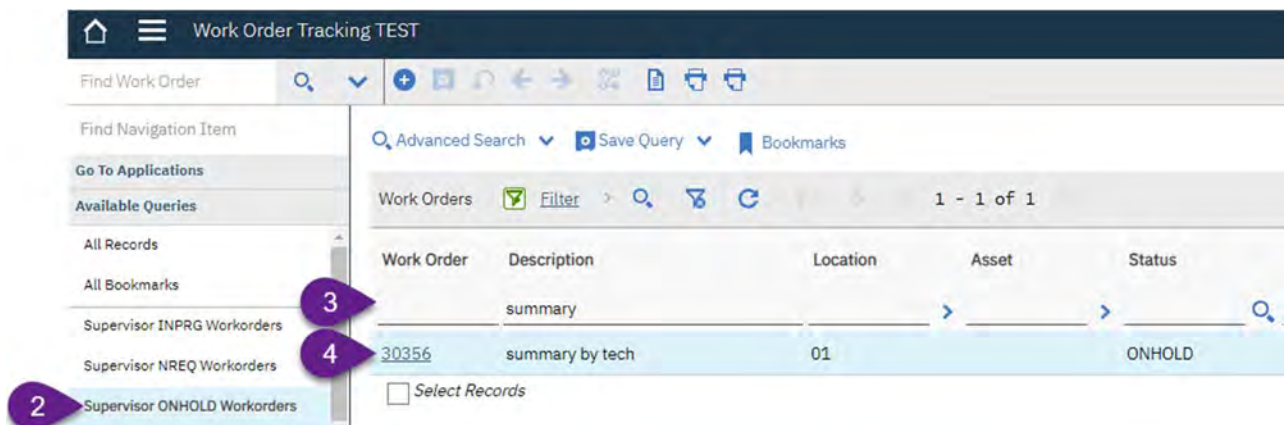


Figure 51 - Selecting WO for review

.. Or ...

5. From the Start Centre

- Find all Work Orders in ONHOLD status in separate Portlet
- Filter WO list to find WO
- Click on WO

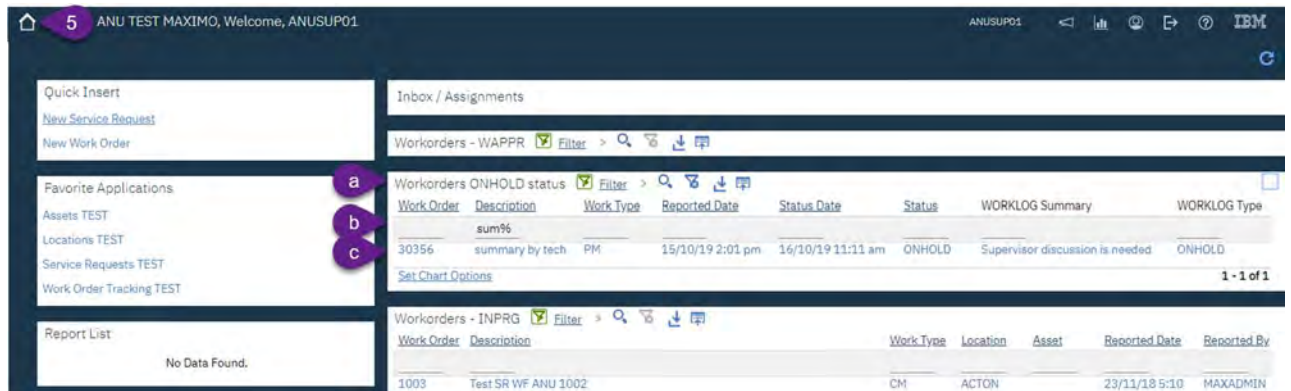


Figure 52 - Accessing SR through Start Center

6. WOs assigned to Supervisor will be in ONHOLD status.

7. Open Log Tab

- Expand latest recorded note
- Type of message is ONHOLD
- Review the summary and details of the note.

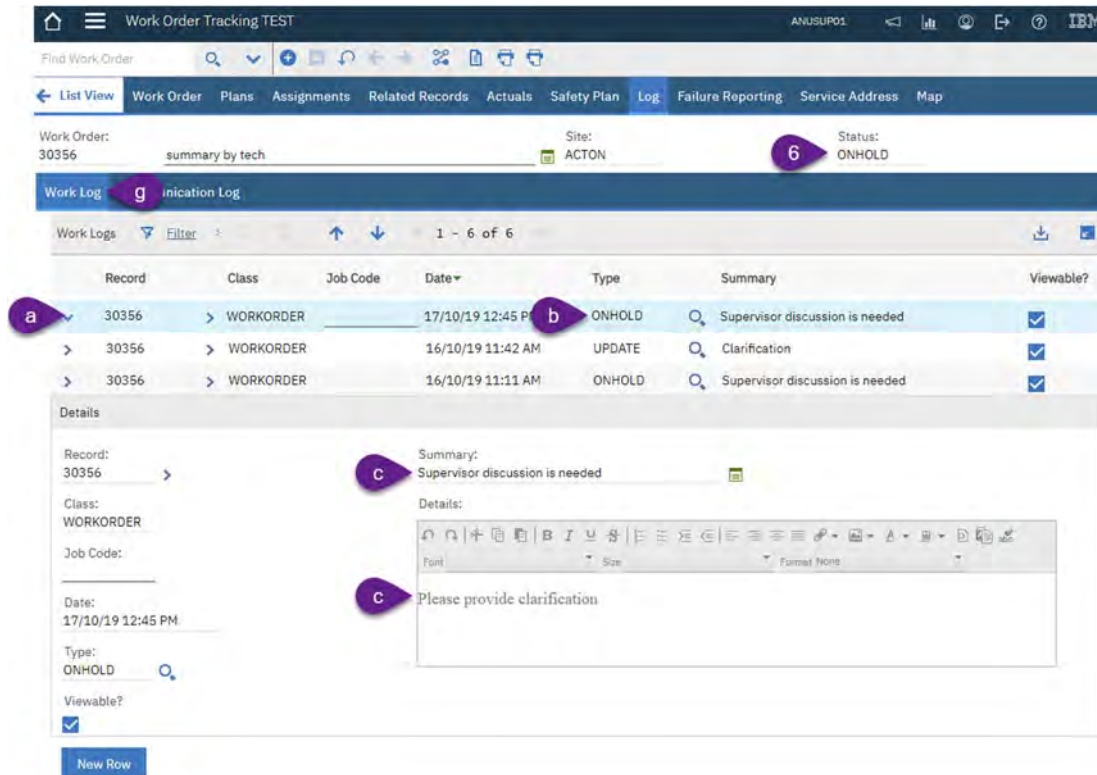
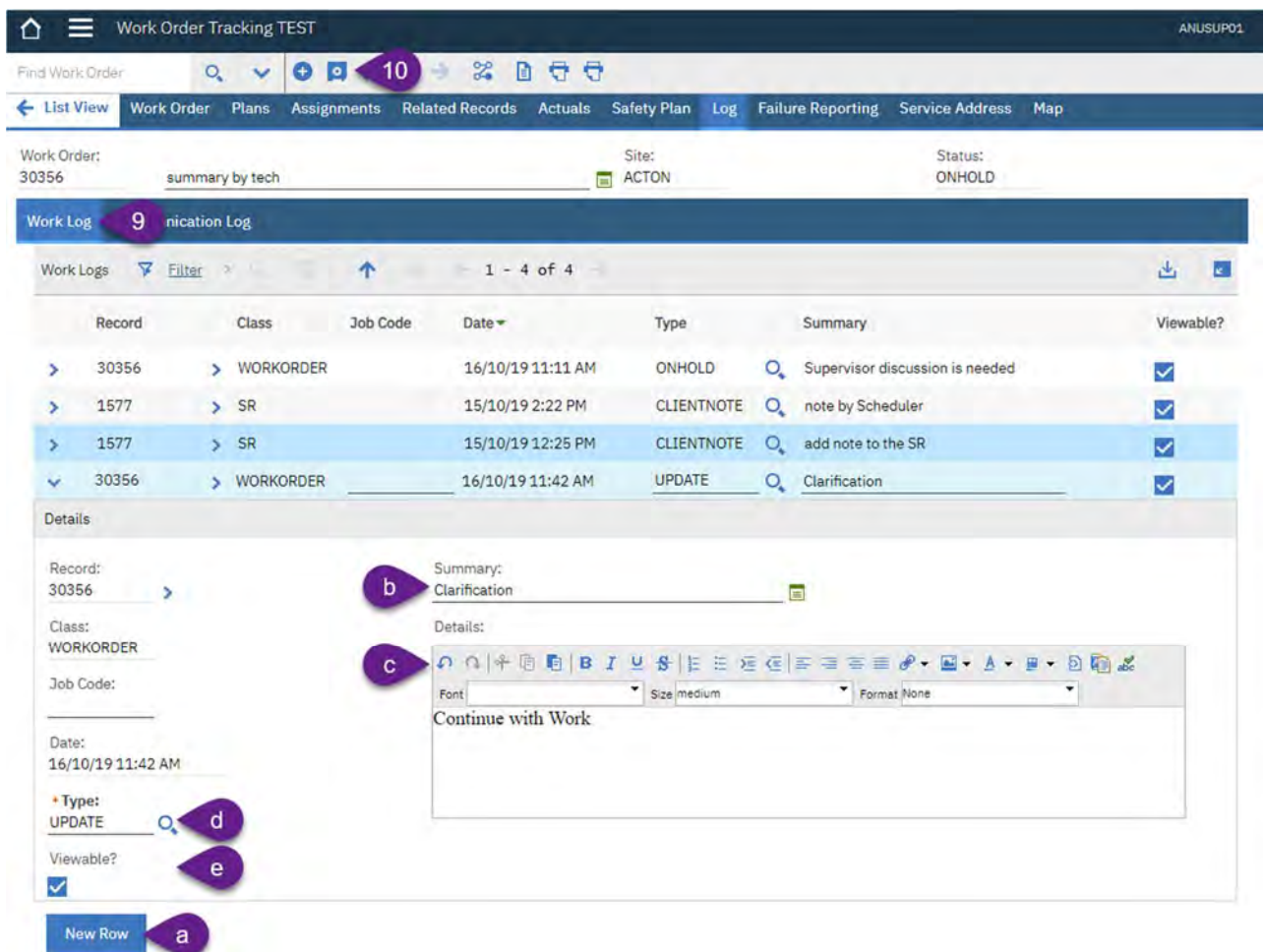


Figure 53 - Review log of 'On Hold' Work Order

8. Based on note, actions will be taken which might involve other resource in and out of the system.
Action taken can be:
 - a) **Option 1:** Technician needs Clarification
 - b) **Option 2:** Work Order should be assigned to Different team
 - c) **Option 3:** Work Order not required anymore

Option 1: Technician needs Clarification

9. Provide clarification through log. Click on the **'Log'** tab.
 - a) Click the **'New Row'** button
 - b) Enter a Summary of the clarification
 - c) Enter a detailed clarification
 - d) Select the **'Type'** of note
 - e) Tick **'Viewable'** option
10. Press **'Save'** button



The screenshot displays the 'Work Order Tracking TEST' application interface. At the top, there's a navigation bar with tabs: List View, Work Order, Plans, Assignments, Related Records, Actuals, Safety Plan, Log (selected), Failure Reporting, Service Address, and Map. Below the navigation bar, the 'Work Log' section is active, showing a table of logs. The table has columns: Record, Class, Job Code, Date, Type, Summary, and Viewable?. The first row shows Record 30356, Class WORKORDER, Date 16/10/19 11:11 AM, Type ONHOLD, Summary 'Supervisor discussion is needed', and Viewable? checked. The second row shows Record 1577, Class SR, Date 15/10/19 2:22 PM, Type CLIENTNOTE, Summary 'note by Scheduler', and Viewable? checked. The third row shows Record 1577, Class SR, Date 15/10/19 12:25 PM, Type CLIENTNOTE, Summary 'add note to the SR', and Viewable? checked. The fourth row shows Record 30356, Class WORKORDER, Date 16/10/19 11:42 AM, Type UPDATE, Summary 'Clarification', and Viewable? checked. Below the table, the 'Details' section is visible, showing the record details for Record 30356. The 'Summary' field contains 'Clarification'. The 'Details' field is empty. The 'Type' is set to 'UPDATE'. The 'Viewable?' checkbox is checked. The 'New Row' button is visible at the bottom left. Numbered callouts (a-e) highlight the 'New Row' button (a), the 'Summary' field (b), the 'Details' field (c), the 'Type' dropdown (d), and the 'Viewable?' checkbox (e).

Record	Class	Job Code	Date	Type	Summary	Viewable?
30356	WORKORDER		16/10/19 11:11 AM	ONHOLD	Supervisor discussion is needed	<input checked="" type="checkbox"/>
1577	SR		15/10/19 2:22 PM	CLIENTNOTE	note by Scheduler	<input checked="" type="checkbox"/>
1577	SR		15/10/19 12:25 PM	CLIENTNOTE	add note to the SR	<input checked="" type="checkbox"/>
30356	WORKORDER		16/10/19 11:42 AM	UPDATE	Clarification	<input checked="" type="checkbox"/>

Details

Record: 30356

Class: WORKORDER

Job Code:

Date: 16/10/19 11:42 AM

Type: UPDATE

Viewable? ☒

Summary: Clarification

Details:

Font: Size: medium Format: None

Continue with Work

New Row

Figure 54 - Adding Log Information

11. Select Change Status option from the Menu
 - a) Select the INPOG status from the list
 - b) Press the 'OK' button.
12. Work Order status is changed to 'In Progress'

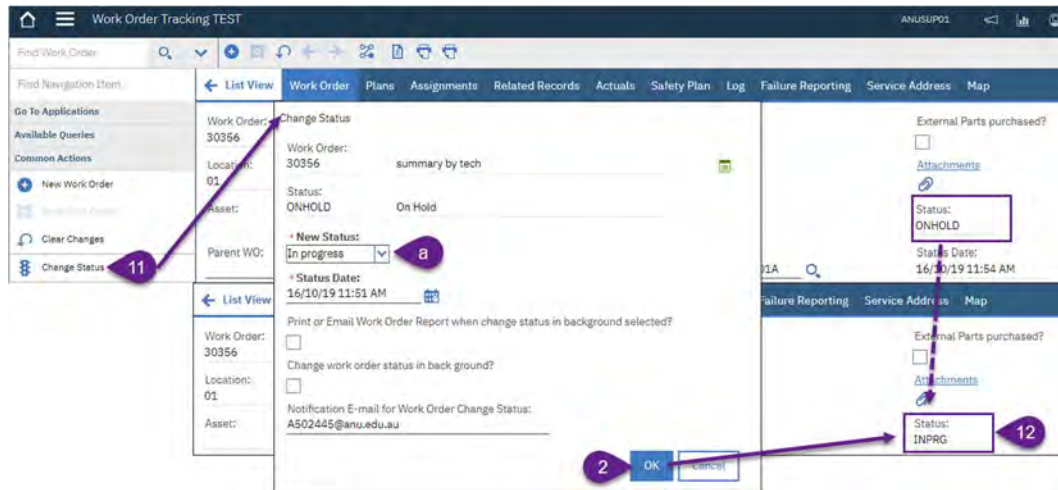


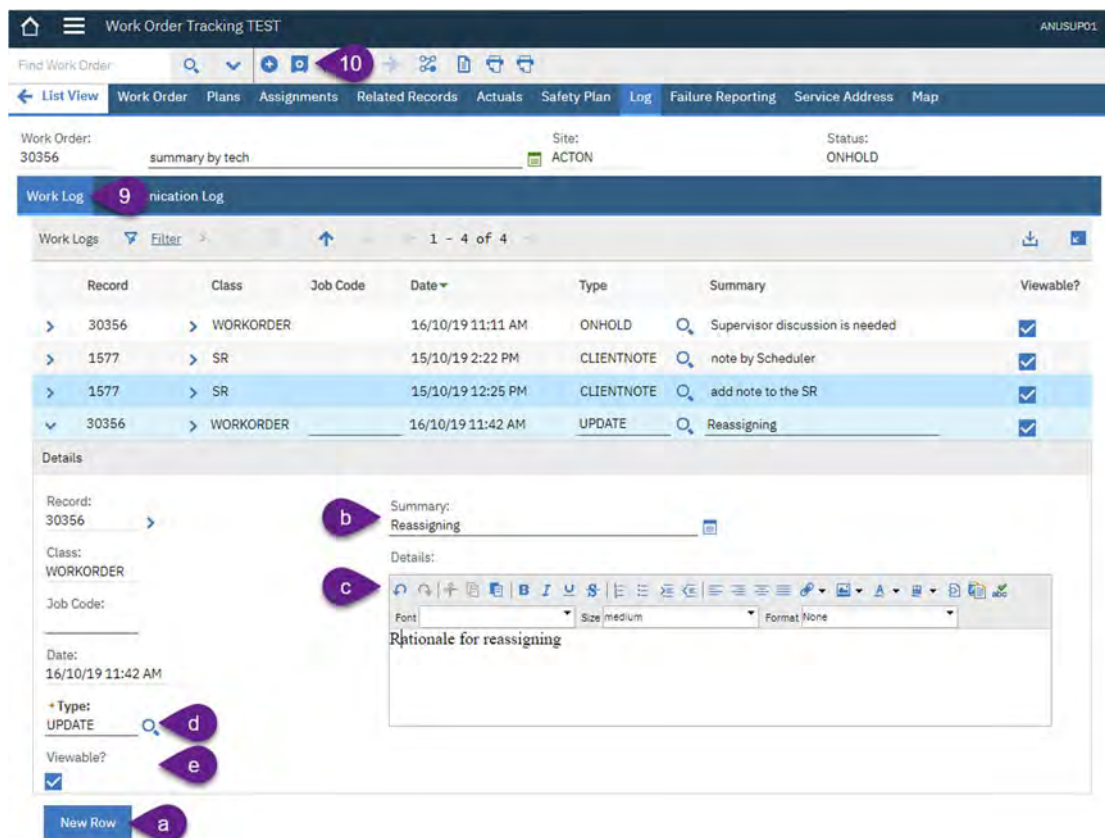
Figure 55 - Change WO status to 'In Progress'

Option 2: Work Order should be assigned to Different team

9. Provide explanation through log. Click on the **'Log'** tab.

- f) Click the **'New Row'** button
- g) Enter a Summary of the explanation
- h) Enter a detailed explanation
- i) Select the **'Type'** of note
- j) Tick **'Viewable'** option

10. Press **'Save'** button



The screenshot shows the 'Work Order Tracking TEST' application interface. The 'Log' tab is selected, displaying a table of work logs. The table has columns: Record, Class, Job Code, Date, Type, Summary, and Viewable?. The first row shows Record 30356, Class WORKORDER, Date 16/10/19 11:11 AM, Type ONHOLD, Summary 'Supervisor discussion is needed', and Viewable? checked. The second row shows Record 1577, Class SR, Date 15/10/19 2:22 PM, Type CLIENTNOTE, Summary 'note by Scheduler', and Viewable? checked. The third row shows Record 1577, Class SR, Date 15/10/19 12:25 PM, Type CLIENTNOTE, Summary 'add note to the SR', and Viewable? checked. The fourth row shows Record 30356, Class WORKORDER, Date 16/10/19 11:42 AM, Type UPDATE, Summary 'Reassigning', and Viewable? checked.

Below the table is a 'Details' form for adding a new log entry. The form includes fields for Record (30356), Class (WORKORDER), Job Code, Date (16/10/19 11:42 AM), Type (UPDATE), and Viewable? (checked). The Summary field contains 'Reassigning'. The Details field contains 'Rationale for reassigning'. The form also includes a 'New Row' button and a 'Save' button.

Figure 56 – Adding Log Information

11. Select Change Status option from the Menu
 - a) Select the WAPPR status from the list
 - b) Press the 'OK' button.
12. Work Order status is changed to 'waiting for Approval'

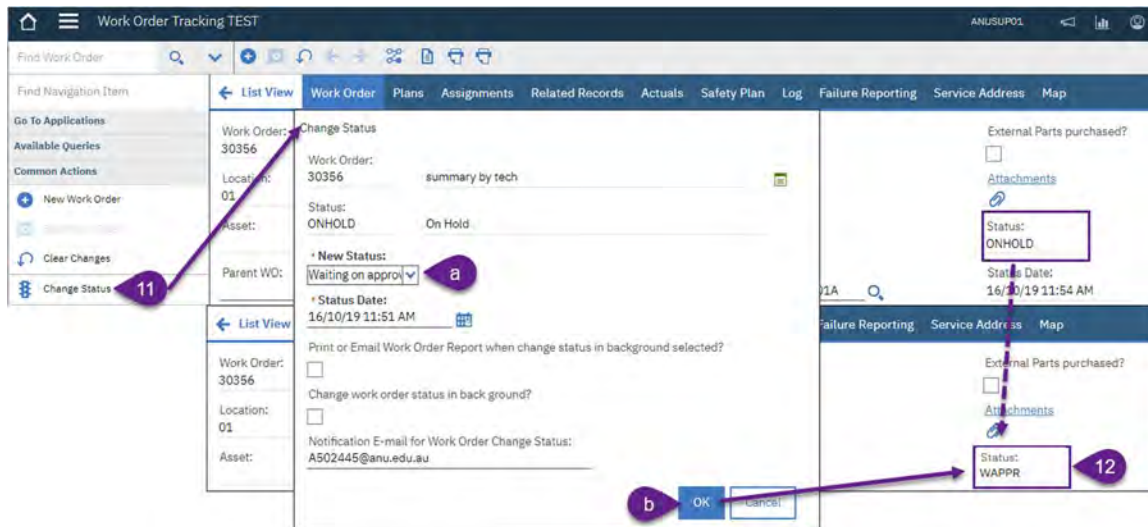


Figure 57 - Change WO status back to 'Waiting for Approval'

13. Change Supervisor field, by clicking on Menu Icon.
 - a) Person dialog will pop up
 - b) Filter out records
 - c) Select new Supervisor
14. Click 'Save' button

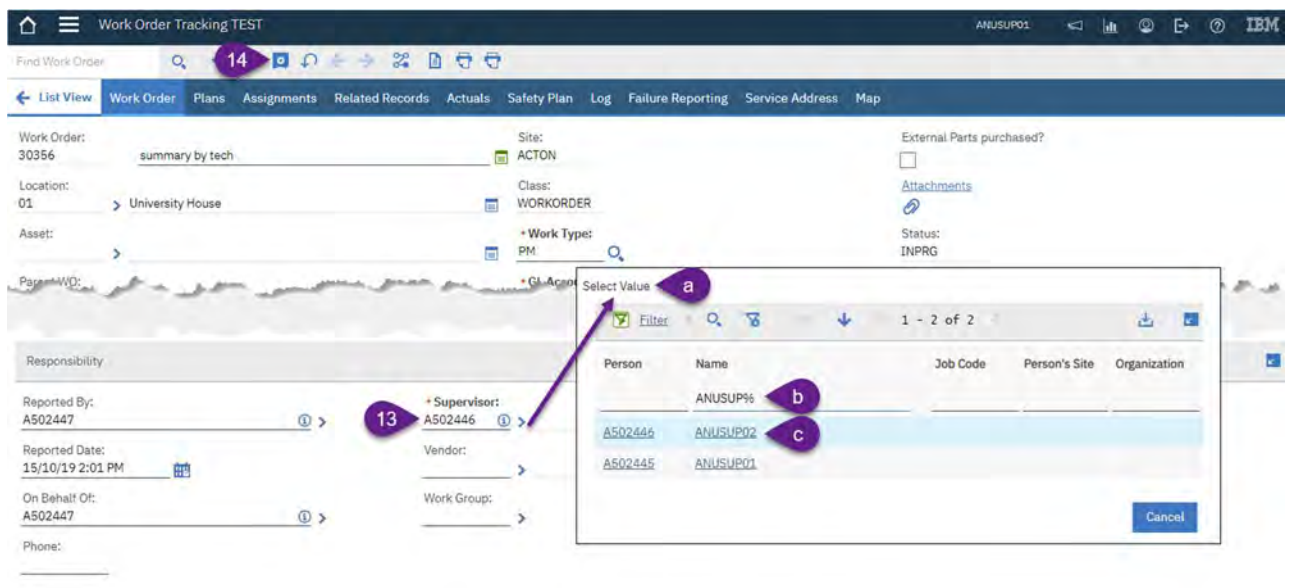
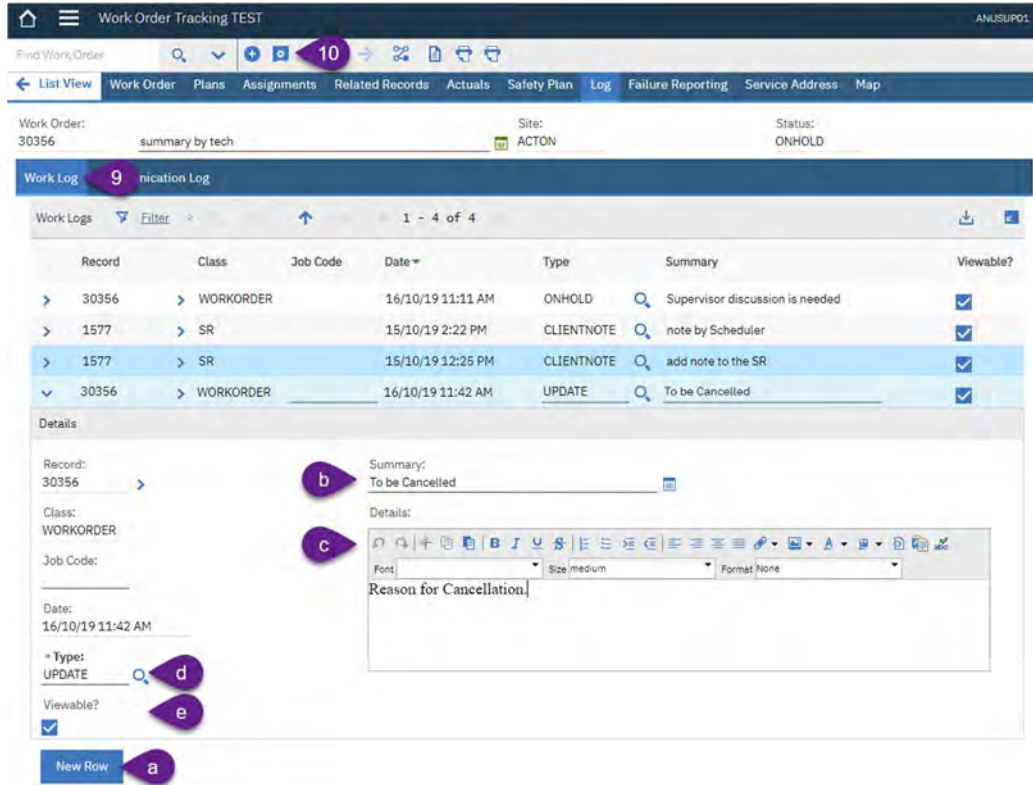


Figure 58 - Change Supervisor Field

15. **Route Workflow.** Work order will be reassigned to another Supervisor.

Option 3: Work Order not required anymore

9. Provide reason through log. Click on the **'Log'** tab.
 - k) Click the **'New Row'** button
 - l) Enter a Summary of the reasoning
 - m) Enter a detailed reasoning
 - n) Select the **'Type'** of note
 - o) Tick **'Viewable'** option
10. Press **'Save'** button



The screenshot shows the 'Work Order Tracking TEST' application. The 'Log' tab is selected in the top navigation bar. Below the navigation bar, there's a search bar and a 'Find Work Order' button. The main content area displays a table of work logs. The table has columns: Record, Class, Job Code, Date, Type, Summary, and Viewable?. The table contains four rows of data. The first row is highlighted in blue. Below the table, there's a 'Details' section for the selected record (30356). The details section includes fields for Record, Class, Job Code, Date, Type, and Viewable?. The 'Type' field is set to 'UPDATE'. The 'Viewable?' checkbox is checked. The 'Summary' field contains the text 'To be Cancelled'. The 'Reason for Cancellation' field is empty. The 'New Row' button is located at the bottom left of the details section.

Record	Class	Job Code	Date	Type	Summary	Viewable?
30356	WORKORDER		16/10/19 11:11 AM	ONHOLD	Supervisor discussion is needed	<input checked="" type="checkbox"/>
1577	SR		15/10/19 2:22 PM	CLIENTNOTE	note by Scheduler	<input checked="" type="checkbox"/>
1577	SR		15/10/19 12:25 PM	CLIENTNOTE	add note to the SR	<input checked="" type="checkbox"/>
30356	WORKORDER		16/10/19 11:42 AM	UPDATE	To be Cancelled	<input checked="" type="checkbox"/>

Details for Record: 30356

Class: WORKORDER

Job Code:

Date: 16/10/19 11:42 AM

Type: UPDATE

Viewable? ☒

Summary: To be Cancelled

Reason for Cancellation:

Figure 59 - Adding Log Information

11. Select **'Change Status'** option from the Menu
 - a) Select the NREQ status from the list
 - b) Press the **'OK'** button.
12. Work Order status is changed to **'No Longer Required'**

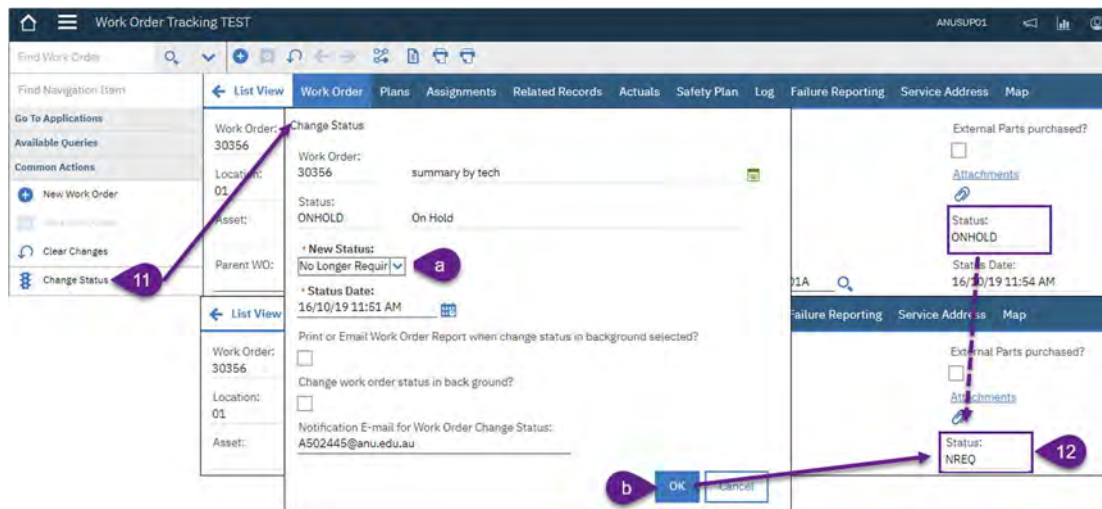


Figure 60 - Changing WO Status to 'o Longer Required'

Activity Name

(Supervisors) Managing Completed Work Orders

When Work Order is Completed (status WORKCOMP), depending on **'External Costs'** ticked, system will automatically change status of work order to WINVOICE (Waiting for Invoice).

1. From the Start Centre, go to the **Work Order Tracking** application:

Go To → Work Orders → Work Order Tracking

... Or

Start Center → Favorite Applications Work Order Tracking



Figure 61 - Path to the WO

2. Select list of WOs from **'Available Queries'** by choosing **'Supervisors WINVOICE Workorders'**
3. Enter additional search criteria and press **'Enter'** to filter the Work Order list
4. Select WO to be reviewed

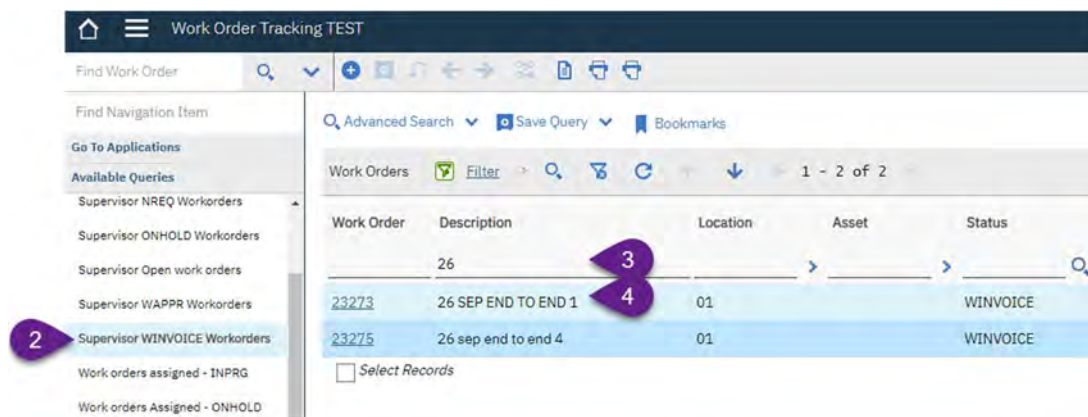
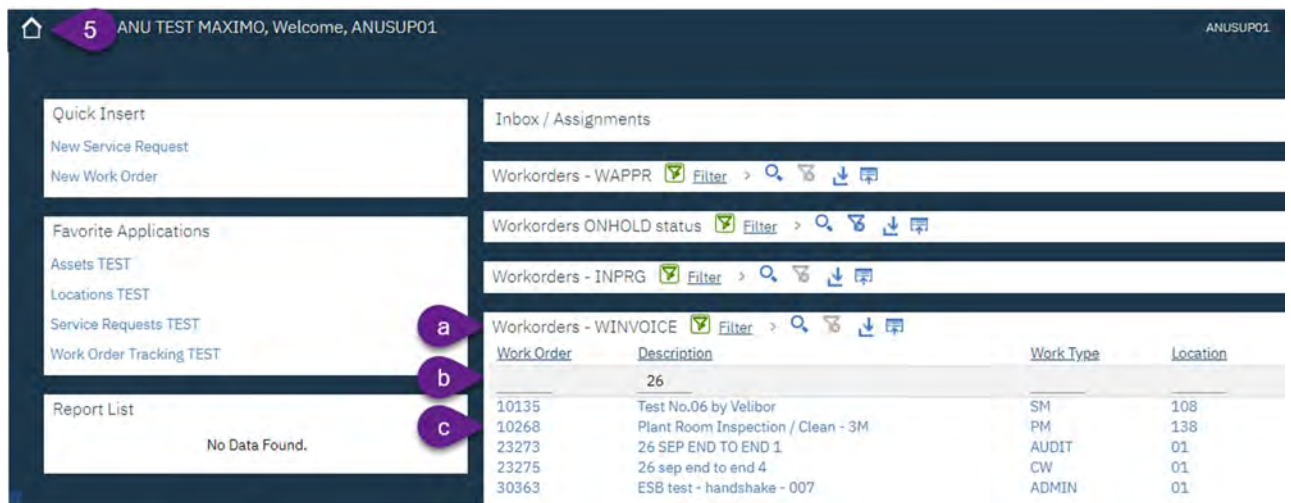


Figure 62 - Selecting WO for review

.. Or ...

5. From the Start Centre

- Find all Work Orders in WINVOICE status in separate Portlet
- Filter WO list to find required WO
- Click on WO



ANU TEST MAXIMO, Welcome, ANUSUP01

Quick Insert
New Service Request
New Work Order

Favorite Applications
Assets TEST
Locations TEST
Service Requests TEST
Work Order Tracking TEST

Report List
No Data Found.

Inbox / Assignments

Workorders - WAPPR [Filter](#) > [Search](#) [Download](#) [Print](#)

Workorders ONHOLD status [Filter](#) > [Search](#) [Download](#) [Print](#)

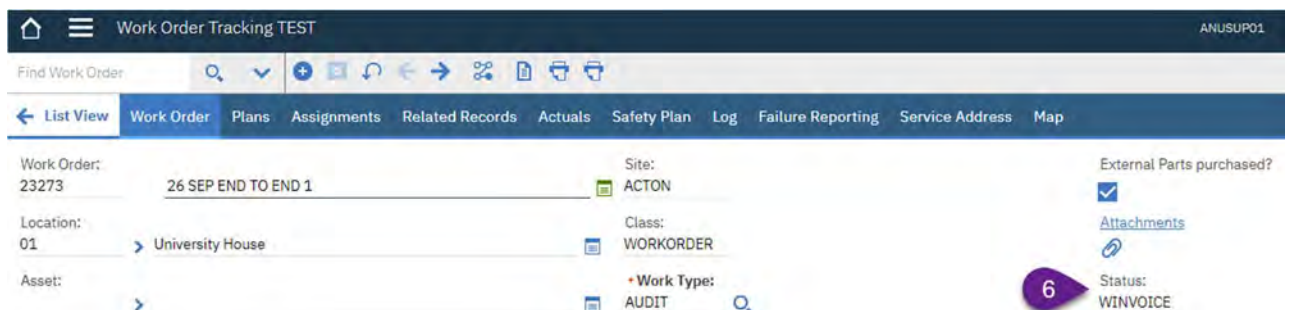
Workorders - INPRG [Filter](#) > [Search](#) [Download](#) [Print](#)

Workorders - WINVOICE [Filter](#) > [Search](#) [Download](#) [Print](#)

Work Order	Description	Work Type	Location
26			
10135	Test No.06 by Velibor	SM	108
10268	Plant Room Inspection / Clean - 3M	PM	138
23273	26 SEP END TO END 1	AUDIT	01
23275	26 sep end to end 4	CW	01
30363	ESB test - handshake - 007	ADMIN	01

Figure 63 - Accessing WO through Start Center

6. WOs assigned to Supervisor will be in WINVOICE status.



Work Order Tracking TEST

Find Work Order: [Search](#) [Filter](#) [Add](#) [Refresh](#) [Back](#) [Forward](#) [Print](#) [Download](#)

← List View | **Work Order** | Plans | Assignments | Related Records | Actuals | Safety Plan | Log | Failure Reporting | Service Address | Map

Work Order: 23273 26 SEP END TO END 1 Site: ACTON

Location: 01 > University House Class: WORKORDER

Asset: > Work Type: AUDIT

External Parts purchased? ☒
[Attachments](#)
Status: WINVOICE

Figure 64 - Work Order in 'Waiting for Invoice' Status