FACILITIES MANAGEMENT
110 Work Initiation

U113: General Work Order Processing
EXAMPLES NEEDED FOR TRAINING

Slide 6: Access the Work Order form and review the fields.
Slide 12: Query up the following work orders from the Work Order form and click the Request button to view “how” the work order was created.

- Capital Project: W001251060
- Mini-Project: WAR2671744
- PM: W001261819
- Child WO: W001262073
- Service Request: W001262067

Slide 13: Make sure W001262066 has an active status.
Slide 14: From the Capital Project form, access Capital Project number 144041151.
Slide 15: From the Project Plan form, access Project PR003882
Slide 18: Exercise 1, convert a SR to a work order.
Slide 19: Exercise 2, copy a SR/WO to make a new SR/WO.
Slide 20: Exercise 3, create a child work order from the Service Request form.
Slide 21: Exercise 4, create a child work order from the Work Order form.
Slide 27: Access the Timecard form and bring up the timecard for DEANR for 11/02/2007 and right click one of the work orders on the timecard.
Slide 28: Access the Equipment Workbench form and with the cursor on equipment number 001-PKSY01, click the WO History… button and click the View… button to view a work order.
Slide 29: Access the HSTM1-LM backlog to view work orders and then click the View… button or right click a work order and choose View/Edit from the drop down menu.
U113 GENERAL WORK ORDER PROCESSING

SUBJECTS COVERED IN THIS UNIT:
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INTRODUCTION TO WORK ORDERS

What are work orders used for?

- To describe a specific job to be performed
- To provide a place to bill labor and material
- For tracking expenditures and labor hours
- For tracking standard, repetitive tasks (Standing WOs)
- For tracking outside contractor costs
- For storing comments and communications regarding a specific job
INTRODUCTION TO WORK ORDERS

How are work orders created?

- Via the Service Request form
- As part of a Capital Project
- As part of a “Mini-Project”
- Via the preventive maintenance work order run
- Child work order creation
WORK ORDER FORM
Reference Fields:

- **WO Number**: Automatically assigned; sequential number prefaced with a W and 9 digits.
- **WO Description**: Short description of the work order; 64 characters long.
- **Parent WO**: Will be filled in if this is a child work order.
- **Equipment**: The equipment being worked on.
- **Equipment Description**: Short description of the equipment displayed in the equipment number field.
- **Type**: Type of maintenance being performed. Some units use special coding in this field.
- **Priority**: Turnaround time to complete the job. Priority also establishes what the Due Date will be.
- **Method**: Whether the work is being done by in house personnel or contracted out.
- **Assigned To**: Employee assigned to the work; not the same as the individual Daily Scheduled for the work.
- **Outage Class**: Not currently used.
- **Status**: Defines the current status of the work order.
- **Material Status**: Status of Issue Request materials.
- **Start Date**: The system automatically enters the current date as the Start Date.
- **Due Date**: Date the work will be completed. Defined by the Work Order Priority. This date can be changed with communication to the customer.
- **Completed Date**: Auto-filled when the Work Order is put in an inactive status.
- **Crew**: The Crew currently assigned to this work order.
- **Craft**: The Craft currently assigned to this work order.
- **Crew Size**: The number of people required to complete the job.
- **Estimated Hours**: The estimated time required to complete this work order.
- **Travel Time**: This field has also been used for other miscellaneous FM uses.
- **Site**: The campus where the building is located; 01 = Minneapolis, 02 = St. Paul.
- **Building**: The Building where the work will be performed.
- **Floor**: The Floor on which the work will be performed.
- **Room**: The Room where the work will be performed.
- **Zone**: The District where the building is located.
- **Tracking 1/Tracking 2**: User defined fields.
- **Non-available Time**: Check with your business unit for how this field is used.
- **Print Ticket On Next Batch Run**: This field defaults to checked when the work order is created. Once the work order is printed, the check is automatically removed.
WORK ORDER FORM

[Image of a work order form with fields for WO Number, Parent WO, Equipment, General Information, Current Status/Dates, Primary Labor, Location, and Tracking 1 and 2.]
Reference Buttons:

- **Print**: For printing the work order.
- **Library**: For accessing procedure libraries.
- **Request**: Accesses information about the requestor as well as how the work order originated; via SR, Mini-Project, Child WO, Preventative Maintenance, or Capital Project.
- **Related WO**: If this work order has child work orders associated with it, they can viewed here.
- **Create WO**: Click to create a child work order.
- **Billing**: Displays the account numbers the work is being charged to.
- **Estimates**: For accessing detailed estimates that were created in COMPASS, also allows for new estimates to be added.
- **Dates**: Displays key dates for processing the work order and the individual that performed the transaction.
- **Audit...**: Displays an audit trail of all modifications made to the work order, by whom, and dates modified.
WORK ORDER FORM
Reference Tabs:

- **Tasks:** Displays the work order long description.
- **Crews:** Displays secondary labor requirements.
- **Parts:** Displays Issue Requests (MDOCs) for material.
- **Tools:** Displays tools needed to complete the job.
- **PO’s:** Displays Purchase Orders for material or services.
- **Routing:** Displays information on the progression of the work order.
- **Readings:** Displays readings for PM and Predictive Maintenance; currently not being used.
- **Closing:** Displays information related to the completion and closing of the work order; cannot close WO from this screen.
- **WO Attachment icon (paper with pushpin):** Various types of communication can be stored here.
  - **NOTES:** Can be added to work order and printed automatically each time the work order is printed.
  - **DOCUMENTS:** Not being used at this time.
  - **MAIL:** Email can be sent directly from the work; a record of the Email is saved to the work order.
CREATING WORK ORDERS

- Click the **Request** button on the **Work Order** form to view the manner in which the work order was created.
- The **Request Information** form appears.
CREATING WORK ORDERS

Via the Service Request Form

- Service Request Status must be SCHEDULED
- Click the Save/Commit icon or press F10 key
- Click the Other tab to view the WO Number field
CREATING WORK ORDERS

Via the Capital Project form

- Access the Capital Projects form
- Query up an active Capital Project
- Click the Work Orders tab
- Click the Add button
- The Capital Project Work Order form appears and is ready for data entry
CREATING WORK ORDERS

Via the Mini-Project *Project Plan* form

- Access *Project Plan* form from Navigator Screen
- Query up the Mini-Project and click the **Phases...** button
CREATING WORK ORDERS

- The **Phase Summary** form appears, listing all the work orders associated with the Mini-Project.
- Click the **Add...** button to create a new work order.
- The **Phase** form appears and is ready for data entry.

A Phase can be created without creating a WO. As with a Service Request, until the **Status** is changed to SCHEDULED, the Phase record will not generate a work order.
CREATING WORK ORDERS

Via the Preventative Maintenance Run

- Work orders are generated Tuesday evenings by the FM Call Center
- Work orders are generated based on frequency assigned to the PM
- PM work orders will automatically appear in the crew backlogs they are assigned
- Planner/Schedulers program the PMs into COMPASS so work orders will be generated automatically
EXERCISE 1

1. Access the Service Request form from the Navigator screen
2. Query up the Service Request you created in U111 Service Request training
3. Change the Status field to SCHEDULED
4. Click the Save/Commit icon or press the F10 key to convert the Service Request into a Work Order
5. Click the Other tab to view the WO Number. (NOTE: Write down the SR number and WO number on the QS Training Worksheet for use in subsequent training exercises.)
CRETING WORK ORDERS

**EXERCISE 2**

1. Using the SR number from the previous exercise let’s copy it and make a new Work Order by clicking the **insert** icon and then the **duplicate** icon.
2. A new Service Request form appears with **ASSIGN** in the SR Number field and with the data copied from the previous service request.
3. Change the data in a few of the fields.
4. Click the **Save/Commit** icon or press the **F10** key to convert the Service Request into a Work Order. (NOTE: Write down the SR number and WO number on the QS Training Worksheet for use in subsequent training exercises.)
CREATING CHILD WORK ORDERS

Child work orders are created....

1. When more work is needed in addition to the original work request
2. When a different crew is required for the additional work request
3. To group the project charges together
4. So related work can be easily queried
**CREATING CHILD WORK ORDERS**

**EXERCISE 3**

1. From the *Service Request* form and using the SR number from the previous exercise, click the *Create WO* button.
2. A new *Service Request* form will appear with a new SR Number inserted and the original WO Number and WO description will have moved down to the Parent WO fields.
3. The work order description field is blank and ready for data entry; enter a brief description for the new child work order and change the data in other fields as needed.
4. Change the *Status* field to SCHEDULED.
5. Click the *Save/Commit* icon or press the F10 key to convert the Service Request into a Work Order. *(NOTE: Write down the SR number and the WO number on the QS Training Worksheet for use in subsequent training exercises.)*
CREATING CHILD WORK ORDERS

EXERCISE 4
1. Access the Work Order form from the Navigator screen
2. Query up the WO number you created in EXERCISE 1 of this training unit
3. Click the Create WO button
4. In the Short Description field enter a new description
5. Select a new equipment number
6. Change the priority
7. In the **Status** field enter OPEN
8. Change the craft
9. Click **No** if the Unmatched Locations pop-up appears
10. Change the estimated hours
11. Click the **Save/Commit** icon or press the **F10** key to save the new child work order.

**(NOTE: Write down the WO number on the QS Training Worksheet for use in subsequent training exercises.)**
12. Query again for the parent Work Order (hint: click the enter query icon twice or press the F7 key twice)

13. Click the **Related WO** button and the child work order you created will be displayed
ACCESSING WORK ORDERS

Work orders can be accessed from...

- The Navigator Screen or the Quick Pick button
- Anywhere in COMPASS where the WO Number field appears (Purchase Requisition, Purchase Order, Current Schedule, Labor Timecard, Service Request)
- The Equipment Workbench
- The Daily Schedule Backlog
From Navigator screen or the Work Order Quick Pick button, access the *Work Order* form and query for a work order.
ACCESSING WORK ORDERS

From any Form via the WO Number Field
- Right click any WO Number field in COMPASS
- Choose View or View/Edit from the drill down menu
ACCESSING WORK ORDERS

From the Equipment Workbench

- Click the **WO History**... button
- Then click the **View** button
ACCESSING WORK ORDERS

From the Daily Schedule Backlog

- Click the Backlog tab to view work orders
- Put cursor on the **WO Number** or click the checkbox next to the work order number and click the **View...** button
The End!!!