Basic Tutorials

Session 3 – Work Order Work Flow (time: 10 minutes)

Assumptions

1. You have completed session 2.

Notes

1. A “Work Order” organizes, documents and logs all aspects of a maintenance action done on a “Functional Location”.

2. The workflow of a work order starts with the creation of a “Work Request” and ends when the corresponding work order is **closed**.

3. Work orders may be generated manually or automatically. The automatically generated work orders are created on a **Schedule** (e.g. “the first day of every month”) or **On Counter Cycles** (e.g. the distance traveled on a car).

Proceed as Follows

1. **Create a Manual Work Request**

- Go to “Maintenance” → “Create Wrequest”.

- Click the link “You need to configure your WO module before you proceed”. You need to do this only once for the lifetime of your account.

- Click the option “they are forwarded to the following Department” (you can change that later) and select your maintenance department.

- Go again to “Maintenance” → “Create Wrequest”.

- On the “**Target FL**” fields, select the functional location the request refers to

    - Select your plant on the top dropdown and wait for the field under it to load.

    - Select Level 0 “MACH” and wait for the field under it to load

    - Select Level 1 “PROD1” and wait for the field under it to load

    - Select Level 2 “MACH1”

    - The current work request is now assigned to Machine 1

- Set “**Type**” to “CORRECTIVE” (know more about WO types: http://goo.gl/FY14nN).
- Set “**Priority**” to “P2-High”.
- Enter “**Summary**” - “Button slightly loose”
- Enter “**Description**” - “This button has been getting progressively worse. Needs to be fixed ASAP”.
- Click “Create”

You have now created a work request but who's going to attend to it? And are there any extra recommendations that can help solve the problem?

2. **Process the Work Request**

- Go to “Maintenance” → “Work Orders”. The work request you created is visible at the top of the list. Select its “WO#” and another browser tab will open.
- **Assign a User:** On the “Add User” list (top right), click on your name to select it. Click the “>>” button.
- **Insert extra comment:** Scroll down to the bottom of the page to the “Add/ Edit Information section and enter “Button has been checked and it will have to be replaced”.
- Click “Save” and close the browser tab.

  The work request has now become an actual work order assigned to a user (yourself). You now have to go on the field and do the job and report back.

3. **Complete the Work Order**

- Go to your “Dashboard”. The work order we are working with is at the top of your list. Select its “WO#”.
- **Enter work report:** go down to the “Add/ Edit Information” area and, in the report tab enter “Button replaced and system tested. Fully operational.”
- **Set order to COMPLETE:** On the parameters area on the left menu, select “COMPLETE” from the “Status” dropdown menu.

- Click the “Save” button. Do not close the “save” confirmation page that is now displayed.

  You have now completed the job with a final work report. But the order work flow is not yet finished. The technician's job needs to be approved.

4. **Close the Work Order**

- Click the “View order” link. Click the “Reports” tab, to confirm the reports show up in chronological order and that the contents are meaningful in case you ever need to get this information back.
- On the “Parameters” menu on the left select “CLOSED” as the work order status. Note that this option has only become available after the work order was set to complete.
- A **closed** work order **cannot be manipulated anymore and is forever stored in the system** as a job log for an action performed on the assigned Functional Location.

5. **Some comments**

- Remember: comma CMMS is a ***multi-user system***, so all the steps described above can be done by either the same person (as in our example) or different by different persons.
- Why do I need to “COMPLETE” a work order and then “CLOSE” it? What is the difference?

  Because on a multi-user environment or on a multi-expertise work order, you may need to assign a job to a mechanic followed by an assignment to a electrician. The mechanic “completes” his job, but the work order is then reassigned to the electrician, who also completes his part.

  Additionally the supervisor may not agree the job is indeed complete and may comment and reopen the work order to the same user (or another user) for additional work.

Status after Session 3

You have learner how to create a Work Order and how its workflow is processed in comma CMMS.

Coming Next

You will learn how to automate the creation of work orders so that you do not need to create them one by one for any recurring work that you may need to perform.

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