



Maximo User Guide (MUG)

for management to end user



VERSION 2.0

Date	Version	Level of Review	Summary of Comments
3/31/2015	1.0	Version 1	Initial publication
10/21/2015	2.0		Complete replacement of chapter 6 (Maximo (Tr)), updates in other areas to reflect change in Maximo screens and many general formatting changes and attempts to improve graphic quality and readability

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1 INTRODUCTION

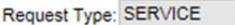
The purpose of the Maximo User Guide (MUG) is to provide the Maximo user community with a living document that serves as a consistent reference location for basic information, data definition and corporate procedural guides. The MUG will be used as a tool by all Facility Engineering Commands (FECs) to capture corporate policies for Maximo usage to ensure standardization of processes across the FECs, and to create local procedures and deviations as need be. The MUG and its reference materials will be a resource for a Business Management System (BMS) process, but will not itself be a BMS process.

The MUG is designed to help familiarize users with both basic navigation in Maximo and more detailed information for frequently used modules and their associated applications. Chapters 2 through 4 describe common Maximo functions while chapters 5 through 7 focuses on module specific features. Basic navigation instructions are given in a step by step format with accompanying screen shots highlighting critical steps. The MUG breaks down the main modules of Maximo into greater detail and provides the reader with the following information:

- Module Overview – explains how the module is utilized and describes the applications that fall under the module
- Business Objectives – specifically explains how the module is utilized by NAVFAC
- Critical Success Factors – outlines the key features in each module that the FECs need to strive for alignment on in order to ensure efficient work flow and metrics
- Key Roles and Responsibilities – highlights the major users and their associated responsibilities within each module
- Process – outlines the basic steps for process management within each module and defines fields within the modules and their intended definitions/descriptions. Additionally, required fields and fields that are automatically populated or provide information to other programs are identified
- References – lists of both corporate and local instructions relevant to the modules and their applications in greater detail

1.1 MUG Notation Key

Throughout the MUG, several notations are used to highlight features and processes. Below is a key to describe the notations.

Notation	Meaning
	Red Arrow – Highlights a specific feature by enlarging it for readability.
	Red Circle – References a feature described in the text of the section.
	Numbered Circles – Matches the steps described in the MUG to the features in the screenshots.
	Orange Box – Indicates that the field being highlighted is required to approve the form or request that the user is populating.
	Gray Box (Read Only Information) – Indicates that the field is either pre-populated based on the user's account, came from an associated record, or that it is no longer editable based on the status of the record.

Notation	Meaning
* Location: 	Red Box – Indicates that this is a required field to save/submit.
*	Asterisks – Indicates that this field is a Required Field.
+	Plus sign – In the Service Request Application, this is a required field to SUBMIT.
 or 	Hexagon or Square Lettering – Labels the fields described in the description tables.

Table 1-1: MUG Notation Key

1.2 Maximo Modules and Applications

Maximo is grouped into modules and applications. The applications that fall under a module have similar purposes. For example, applications related to purchasing are grouped together. Some applications, such as Work Order Tracking, function individually. Others, such as Precautions, create records designed to be used in conjunction with records created in other applications.

Later chapters describe each module and application in more detail. While NAVFAC uses each module in the below list, not all of the module features and applications may be used.

- **Assets** – Used to manage assets and locations from the beginning to the end of an asset’s life cycle. This module consists of the following applications:
 - Assets
 - Condition Monitoring
 - Failure Codes, Locations
 - Meters and Meter Groups
- **Preventive Maintenance** – Used to manage maintenance work performed on a regular schedule in order to keep assets running efficiently. This module consists of the following applications:
 - Master PM
 - Preventive Maintenance
- **Service Desk** – Used as a single point of contact for users who need help or support with facility or utility issues. This module consists of the following applications:
 - Activities
 - Changes
 - Incidents
 - Problems
 - Releases
 - Service Requests
 - Solutions
 - Ticket Templates
- **Work Order** – Used to document tasks to be accomplished and the labor, materials, services, and tools needed to complete the work. This module consists of the following applications:
 - Assignment Manager
 - Labor Reporting
 - Service Requests
 - Quick Reporting
 - Work Order Tracking
- **Motor Pool (Tr)** – Used in the Motor Pool module to manage vehicle requests and dispatches and associated billing

- **Data Import (Tr)** – Used in to import externally generated data into Maximo for Transportation
- **Inventory** – Used to maximize the availability of items for upcoming work tasks and reduce excess inventory balances and related carrying casts. This module consists of the following applications:
 - Item Master
 - Inventory
- **Planning** – Used to plan work and create templates that can be copied to other Maximo records. This module consists of the following applications:
 - Job Plans
 - Routes
 - Safety Plans
- **Purchasing** – Used for tracking financing, purchasing and contracts. This module contains the following applications:
 - Companies
 - Company Masters
 - Invoices
 - Purchase Orders
 - Purchase Requisitions
 - Receiving
 - Request for Quotation
 - Terms and Conditions
- **Warranties (Tr)** – Used to manage item warranties, asset warranties, and warranty claims for Transportation

The constant flow of information between the programs and the desire to drive consistent data and metrics clearly define the need to ensure that data within Maximo is consistently input and accurately maintained.

1.3 Maximo User Standardization Team (MUST) Working Groups

To support NAVFAC business objective and improve the effective and efficient use of Maximo, the PWBL will establish various working groups to review/evaluate and provide recommendations and process improvement. These MUST groups will review existing practices and provide recommendations to Senior Management. Upon review and approval of any recommendations, the MUST groups will develop plans, schedules and required system changes to support changes. Integral to the planning will be how the changes will be communicated and providing appropriate training materials.

The focus of these working groups will be to drive alignment across the corporation and to ensure that best practices are shared and understood at all echelons, and a general improvement of the quality and consistency of data established or stored in Maximo. The MUST Working Groups will provide updates to the MUST and all process changes requiring Maximo modifications will be vetted through the Maximo User Group and the Change and Control Board (CCB).

1.4 MUG Revision Process

The MUG is a living document that will continuously grow with the organization. As a tool to facilitate standardization of the community the MUG will require regular revision to incorporate additional information and to meet the needs of the organization. In order to facilitate a consistent change process a MUG revision will be planned twice per year in October and April. The FECs are encouraged to provide comments and feedback to the current version of the MUG at any time, but the preferred window for

major changes is as shown during the May to July and November to January time frames; allowing a sufficient window for comment incorporation and review by all the FECs during the months of August/September and February/March. Additional information on the MUG update schedule and information on how to submit comments will be maintained on the MUG Portal Page.

2 MAXIMO IN NAVFAC

This chapter will orient the user with a basic understanding of how Maximo is used within NAVFAC, how an account is requested, how problems are reported, and where training resources are located. The intent of this section is to:

- Provide a brief history of NAVFAC's use of Maximo®
- Introduce the NAVFAC Work Induction System (WIS) and NAVFAC Work Management Systems (WMS)
- Describe how to establish a Maximo Account (including Information Assurance (IA) considerations)
- Outline Maximo Operation, Performance Monitoring, Problem reporting and other support options
- Outline training resources

NAVFAC has used multiple software packages to support facility maintenance for over 30 years. As the Navy and NAVFAC reorganized, they standardized their systems by adopting a commercial Computerized Maintenance Management System (CMMS) software product called Maximo®. Maximo was initially developed by MRO Software and was purchased by IBM® in 2006. Initially, multiple versions of this software were used, and the data was housed in multiple locations across each Facilities Engineer Command (FEC). NAVFAC standardized commands to operate on the same enterprise version of the software. Maximo operated on version 5.2 and was referred to as Single Platform Maximo (SPM). Vehicle operations was supported a separate software program called NAVFAC Enterprise Transportation (NET). This application was not interfaced with SPM. NAVFAC also used a separate custom built software program as a work induction system (WIS). Work inducted for execution was routed to either Maximo or eProjects for work management. Transportation related work was managed outside of the WIS and completed only in NET.

This group of applications supported many NAVFACs requirements, but was expensive to operate and maintain and the software was no longer supported by the vendor. NAVFAC reviewed their requirements, underwent a multi-year design process to establish a common version of Maximo and migrated all individual Facilities Engineering Commands' data to this common data architecture across the enterprise. The previously separate WIS application function was included in Maximo. NAVFAC purchased Maximo for Transportation, which will be referred to as Maximo (Tr) and modified it to meet our transportation and fleet management requirements to replace NET. The planning and multi-month implementation of Maximo, and the shut down and disestablishment of SPM, NET and WIS were completed in 2011.

Not all NAVFAC documentation has been updated to reflect the system changes, but in summary:

- The systems called SPM, NET and WIS were disestablished in 2011, and should no longer be referenced by or used in relation to current NAVFAC operations. Those functions are now integrated into, or are replaced by, Maximo.
- WIS is now completed with the Maximo Service Request Application, but the larger management process of deciding which work to induct is managed through separate management and approval at the PWD and FEC.
- Once inducted, work may still be managed in either of NAVFAC's work management systems, Maximo or eProjects.

- References to Maximo should not refer to the version number, unless to highlight a relevant change or new feature.

NOTE: NAVFACINST 3354.1, NAVFAC COMMAND WORK INDUCTION SYSTEM is in the process of being revised and updated by Headquarters Operations to reflect the new system configuration and new WIS procedures. The updated instruction should be released in FY16

2.1 NAVFAC Support Tracking System (STS)

To obtain support, NAVFAC CIO maintains a unified information system call Support Tracking System (STS) to receive, route and manage support requests. This system is the recommended process for users to request access and support for Maximo. The tickets are grouped and routed based on the information provided for local facilities (FEC) and may be routed to NITC for review and action. It is critical for users to use the STS system and not email/phone issues in, especially when reporting a problem. The problem identification and resolution process is different if the issue is only at a single PWD than at multiple installations or system wide.

Maximo users will use the STS to:

- Request a Maximo Account
- Request a password reset or an account to be unlocked (including MARP)
- Grant authorizations for additional security roles or permissions
- Report system issues such as a loss of connection or a slowdown in operation
- Report Maximo operational problems or abnormal operations
- Modify records (Work Orders, Assets, Locations, etc.) in way that exceed your authority

The MUG is not intended to replace the extensive [STS Customers' Guide](#) on the NAVFAC portal.

2.1.1 Accessing the STS System

To use the STS system, you must be able to access the NAVFAC Portal. If you are not able to access the portal, please contact your FEC CIO or PW point of contact for assistance.

The STS website can be reached at the following URL or directly through the portal.

[https://hub.navfac.navy.mil/webcenter/portal/cio/CIO+Support/Support+Tracking+System+\(STS\)](https://hub.navfac.navy.mil/webcenter/portal/cio/CIO+Support/Support+Tracking+System+(STS))

After reaching this screen, scroll down and select 'NEW REQUEST'. You should receive a screen with contact information entered similar to Figure 2-1: Generic STS Ticket Screen. Depending on the desired action, you may need to modify the defaulted selection for the fields in red font (CATEGORY, SUBCATEGORY and PROBLEM) based on the desired result. If you have supplemental information/documents including screen shots, reports, or pictures, they can be attached to the ticket. Personally Identifiable Information (PII) should not be included in the STS ticket body or attached to the ticket. Contact your CIO for guidance on how to properly transfer PII.

Figure 2-1: Generic STS Ticket Screen

2.1.2 Requesting a Maximo Account

Create a new STS and use the following values:

Field	Selection
Category	Application Support
Sub Category	Maximo
Title	Request Maximo Account (New or Reactivate) [Note 1]
Problem:	<p>To assist and speed up account creation, and provide privileges and access:</p> <ul style="list-style-type: none"> • Explain the roles and responsibilities you will have in Maximo; • Indicate what installation or FECs you will need will be working on • Provide your Supervisor's name and work center as appropriate <p><i>NOTE: If you are replacing a current employee in the task, indicate that employee's name. [NOTE 2]</i></p>

Table 2-1: STS Values to Create a Maximo Account

NOTE 1: If you are a returning employee, or a current employee moving to a new location, your old account can be reactivated. Please indicate that you have an old account, and provide your username if possible.

NOTE 2: Maximo accounts have role based security. Many users have multiple roles (i.e. Approve Service Request, Submit Purchase Requests, Approve Purchase Orders, etc.). If you will be performing the same function as another person, by providing their name – it may be appropriate to duplicate that person's permission to your account.

In addition to the STS ticket, you will be required to submit a SAAR (System Authorization Access Request) if you don't currently have one on file. Generally, if you have NAVFAC portal access and can submit a STS ticket, you have completed that step.

2.1.3 Password Reset and Account Deactivation

IA (Information Assurance) rules require Maximo accounts be locked if they are not used once every thirty (30) days, or after three unsuccessful login attempts. Maximo never deletes user accounts due to financial auditability requirements, but it automatically deactivates accounts if they are not used once every forty five (45) days.

Later, the MUG will explain how users can establish a method for self-reset of their password. This process will not unlock an account.

An STS ticket must be submitted to unlock an account, reactivate an account, or reset a password. STS fields required to submit a request is covered in Table 2-2: STS Values for Password Reset.

Field	Election
Category	Application Support
Sub Category	Maximo
Title	Request Password Reset/Account Unlocked
Problem:	Any relevant additional information

Table 2-2: STS Values for Password Reset

2.1.4 Reporting a Problem

Maximo users may experience problems such as connecting, logging in or other abnormal operations in Maximo. There are three general categories of problem areas that users may experience:

- Loss of Connectivity – inability to reach Maximo to log-in or the inability to reach other NAVFAC applications or the public internet
- Slow Connectivity – able to log-in to Maximo, but with unusual performance
- Abnormal behavior - can reach Maximo and log-in, but with unexpected actions or unusual operation

All of these problems require the submission of an STS ticket. However, since access to Maximo must transit NMCI/ONE-NET to reach NITC, connectivity issues are challenging to diagnose. To assist in troubleshooting, it is requested that the user submit a STS as shown in Figure 2-2: Sample STS for Reporting Connectivity Issues. By using these categories, with information provided by Business Performance Monitors (BPM), NITC can help identify the problem as a base, building, system connectivity, or system process.

Abnormal behavior should be reported within Application Support and Maximo along with a detail report of the request.

Responding Command	NAVFACENGCOMHQ
Requester's Command	NAVFACENGCOMHQ
Requester	Manning, Stuart N (202-685-9253)
Category	IT Support
Subcategory	End-to-End Performance
Priority	Routine
Title	Loss of Connection (sample)
Problem	Provide specifics of the your location (installation, Building, Room, Computer) to help - CIO and NITC troubleshoot if the issue is local, installation or system wide. Clarify if you have NO connection or if slow
Requested	03/11/2015 13:41
Due Date	
Status	Requested
Attachment	*Do not attach documents containing PII data Browse...

Figure 2-2: Sample STS for Reporting Connectivity Issues

2.1.5 Business Performance Monitors (BPM)

To assist in monitoring NAVFAC business system performance and help identify abnormal system behavior, a collection of NMCI/ONE-NET workstations complete a set of representative tasks during working hours every fifteen (15) minutes. These computers and monitoring software are referred to as Business Performance Monitors (BPM).

Unless down for repair or relocated by the FEC CIO, there is at least one BPM at every installation. Currently, there are 11 tasks accomplished every 15 minutes on each BPM distributed around the world. The tasks are organized in a script to capture a series of representative tasks and simulate a ‘user experience’. The BPM scripts measure the time, in seconds, for each task to complete—capturing the delays/performance at the installation, across the NMCI/ONE-NET networks and NITC/Maximo floor a user sees.

While the BPMs are used primarily for long term performance trends (and alerts to CIO when a performance standard is not met), specialized scripts have been developed for a limited period to help in diagnosing specific problems.

While a BPM can only approximate a user experience because it completes the same tasks every 15 minutes, it can be used to show performance trends for a base, the region, or system. When you submit STS tickets reporting connectivity/speed issues, the BPMs may be reviewed by CIO and NITC.

2.2 Training Resources

NAVFAC maintains a robust Process Driven Training (PDT) program. Training is offered on many business system applications, with 20+ courses related to Maximo or involving the use of Maximo. The

program is managed out of the Business Development (BD) office at NAVFAC Atlantic. All course information and sign-up and schedules can be accessed on the NAVFAC portal at:

<https://hub.navy.mil/webcenter/portal/bd/Process+Driven+Training>

While most courses are routinely offered, some are on demand. Classes are routinely scheduled to provide convenient times to OCONUS locations. It is suggested that users have requested (or received) Maximo account access before scheduling their class to maximize the value of training.

2.2.1 Sampling of Maximo Courses Currently Offered as PDT

Below is a list of several Maximo training courses currently offered as PDT.

- BSVE - Vehicle Scheduling
- ICAP - Managing Condition Index
- Introduction to Performance Assessment
- Maximo: Overview
- Maximo: Managing Assets
- Maximo: PMs (four separate courses)
- Maximo: Service Requests & Work Orders
- Maximo: Job Plan & Routes
- Maximo: Purchase Requests & Purchase Orders
- Maximo: UEM (UM) Reporting Outages
- NAVFAC 101 - An Organizational Overview
- PWD Workload Mgmt. Leadership Overview

If you review the course information pages, there are several resources or job-aids available for immediate download without the requirement of taking the course.

2.3 FEC Maximo Resources

All FECs have user groups, web pages, procedural guides and other resources. Many FECs have specific distribution lists or other methods to notify you of system changes, outages and other related information. Many, but not all, FECs have a Maximo SME located within the core to coordinate the use and operation of Maximo in the FEC. Consult your supervisor and co-workers on how Maximo information is communicated. These tools will be standardized in future versions of the MUG.

3 BASIC MAXIMO LAYOUT AND NAVIGATION

This section will explain several of the features provided in Maximo as well as layouts and navigation features that are common to most Maximo screens. The following sections will walk the user through logging in to Maximo, navigating throughout the application, conducting searches, and accessing online help documentation.

3.1 Logging In

The Maximo system is a web-based application and is accessed by:

Step 1: Opening a web browser and navigating to:

<https://maximo.navfac.navy.mil/maximo/webclient/login/login.jsp>

Step 2: Verifying/Authenticating your identity with certificates by using your Common Access Card (CAC) or PKI.

Step 3: Acknowledging the information screen by clicking 'OK.'

Step 4: When prompted by a log in screen, entering your User Name and Password and then selecting 'Sign In.'



Figure 3-1: Maximo Log In Screen

3.2 General Screen Layout

3.2.1 Home Screen

After logging in, the user will be taken to the home screen, designated as the Start Center. From the Start Center, the user will be able to access Modules and Applications as designated by permissions.

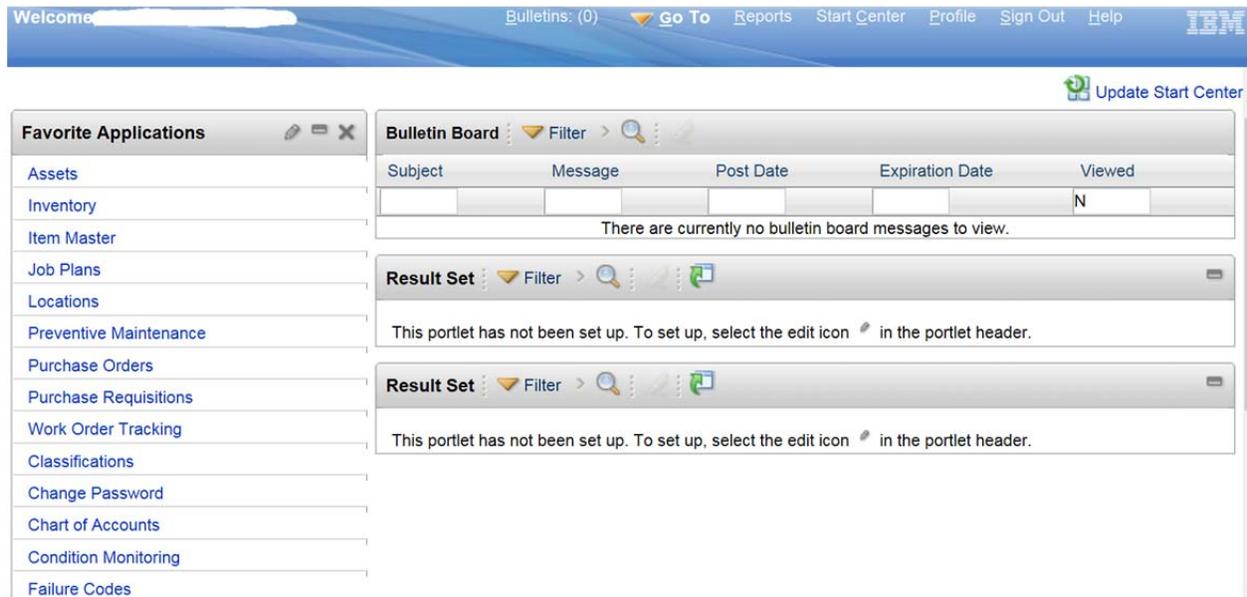


Figure 3-2: Start Center

At the Start Center, the user will have several navigation options to choose from. The Navigation Bar, shown in Figure 3-3: Navigation Toolbar is located at the top of the Start Center and is present on all Maximo Screens. The Navigation bar identifies the current application, shows messages, and has links so you can move among applications



Figure 3-3: Navigation Toolbar

From the Navigation Bar on the Start Center, shown in Figure 3-3: Navigation Toolbar, the user is able to select from the following options to navigate to a Module or Application:

- Option 1:** 'Go To' menu: After clicking on this option, a dropdown will appear with a list of Modules that the user has access to. Hovering over a Module will produce a sub-menu of applications for that module. Clicking on an application will take a user to that application.
- Option 2:** Select a 'Favorite Application' on the left-hand menu to go directly to a specific application.

Additional Options on the Navigation Bar:

- ‘Bulletins’ link: Click to display the Bulletin Board and view broadcast messages. This link only appears when there are active Bulletin Board messages.
- ‘Reports’ link: Click to display a menu of modules, letting the user maneuver among modules and applications to select an application to run reports against.
- ‘Start Center’ link: Click to return to the Start Center
- ‘Profile’ link: Click to manage the personal information (address, phone, e-mail, etc.), defaults, and Maximo password recorded for the user.
- ‘Help’ link: Click to display the help menu (when selected from application pages), or context-sensitive help (when selected from dialog boxes). This link is always available.
- ‘Sign Out’: Click to sign out of Maximo

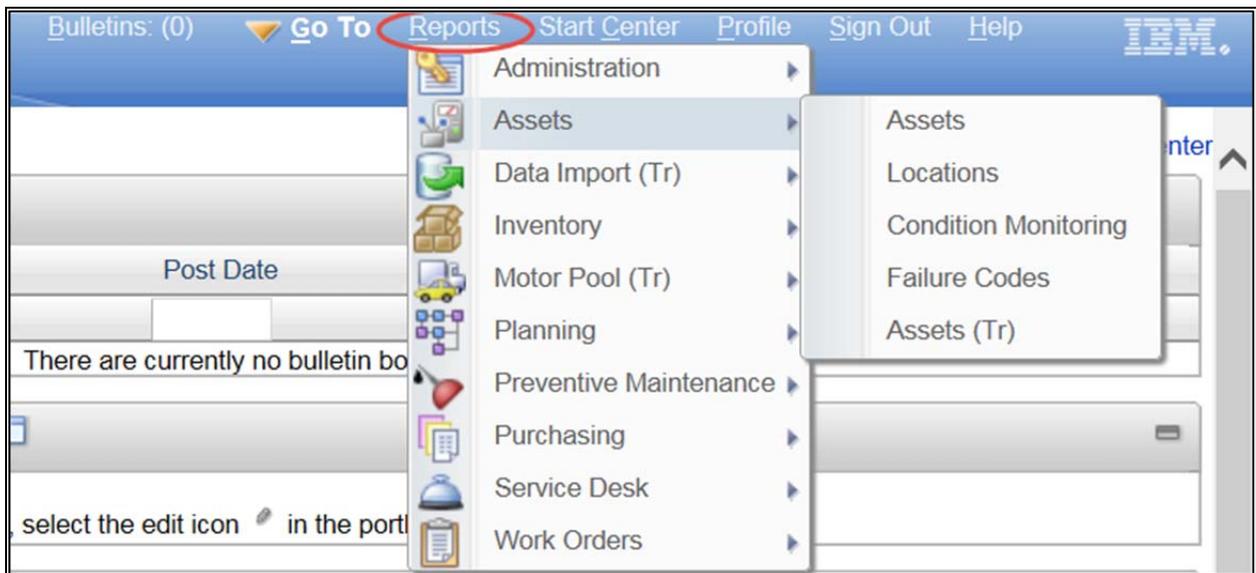


Figure 3-4: The 'Reports' Link Toolbar Option

3.3 Navigation and Features within an Application

The navigation and search features explained in this section are common throughout the Applications. The Assets Application will be used to demonstrate the Navigation options within each application.

Clicking on a tab header opens the tab. Once the Application opens, there are multiple tabs (i.e. Lists, Asset, Spare Parts, etc.) available, with each application displaying specific information relevant to the tab.

Within all applications, tabs are sub-divided into tables to display additional categories of information. For example, Figure 3-5: Assets Application and Tabs, shows the Asset tab content divided by tables such as the Details and Purchase Information tables.

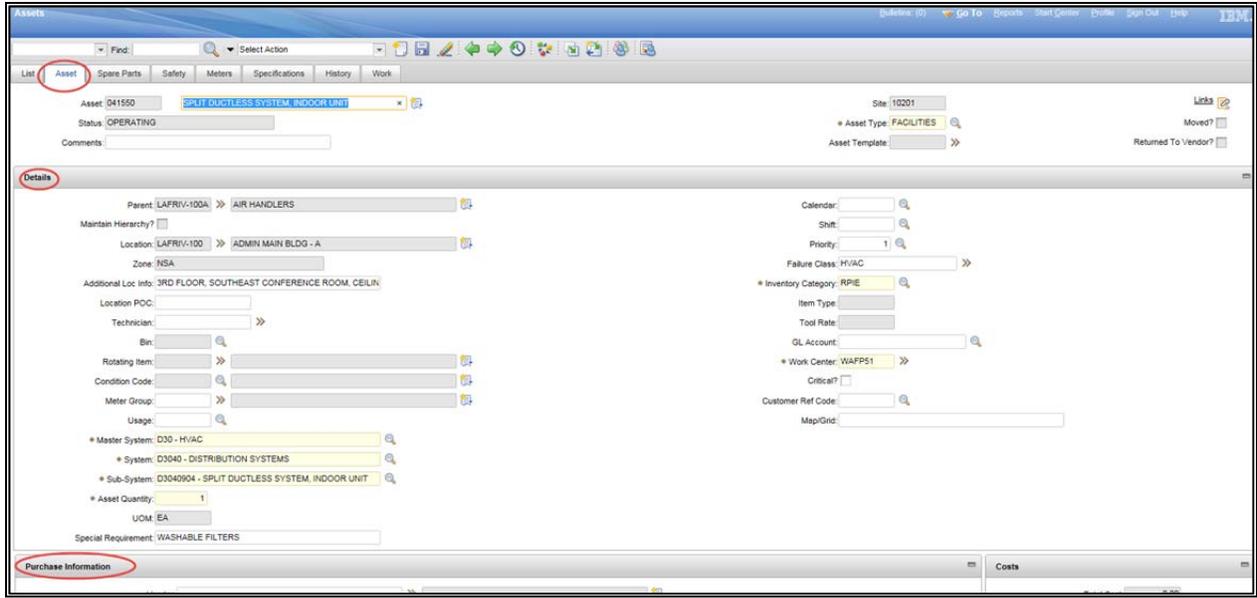


Figure 3-5: Assets Application and Tabs

Within each Application lies an Application toolbar that will allow the user to navigate within the space.

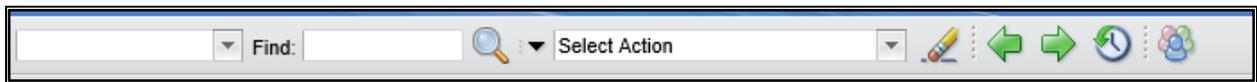


Figure 3-6: Application Toolbar

It is important to note that when using Maximo, the user should not use the internet browser's buttons for moving 'back' and 'forward' between windows. Instead use the tabs, menus, and links that are contained within the Maximo page. This allows Maximo to always know exactly what to do with the information the user has entered and ensures that unsaved data will not be lost.

The following lists the function of each feature in the Application toolbar.



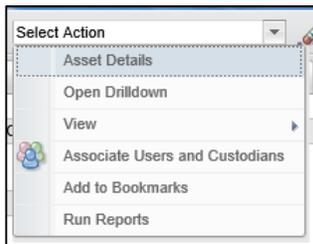
Displays the dropdown of all save queries for the application in use.



Allows the user to Search for a Record by its name.



Select Value Option – initiate the search for the value that was entered in the 'Find' field.



Select Action Dropdown - Allows the user direct access to application-specific functions. Which Select Actions and Toolbar Icons are displayed and accessible are based on membership in Security Groups.



Allows the user to undo or clear the most recent change



Allows the user to navigate between records



Allows the user to access recent navigation History



Displays a list of Associate Users and Custodians that contribute to this record

An additional feature at the bottom of several Maximo application screens is the ‘New Row’ button, as shown in Figure 3-7: Adding a New Row to an Application. When clicked, this adds an additional row of information to a particular section.

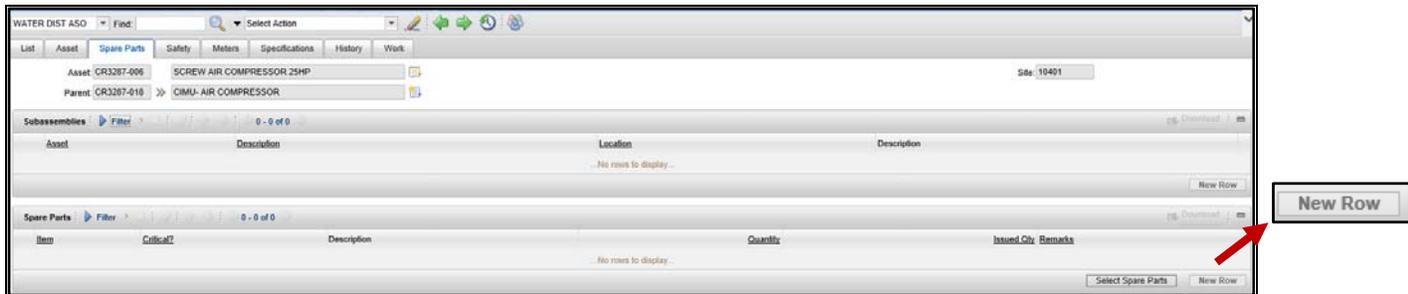


Figure 3-7: Adding a New Row to an Application

To populate the fields on a ‘new row,’ the user should click on the Detail Menu next to a field (represented by double arrows ) to reveal specific menu options that can be selected for a field. This includes the ability to select items from a list (Select Value) as well as the ability to hyperlink to relevant applications related to the field through the Go To option. In many cases, the Select Value option represented by the magnifying glass is placed next to a field. This option allows the user to select a specific record from a list.

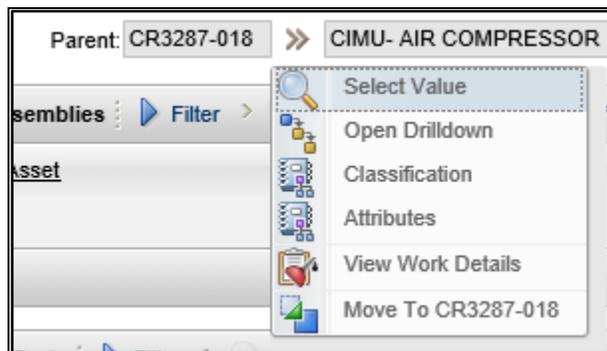


Figure 3-8: Detailed Menus within Applications

3.3.1 Keyboard Shortcuts

The user can use a combination of keys to perform a navigation action without using a mouse.

Standard Shortcuts for Global Navigation:

Link name	Keyboard shortcut
Bulletins	Alt+B
Go To	Alt+G
Reports	Alt+R
Start Center	Alt+C
Profile	Alt+P
Sign Out	Alt+S
Help	Alt+H
Return	Alt+R
Return with Value	Alt+W

Table 3-1: Global Navigation Shortcuts

3.4 Queries

In Maximo, queries are requests to find information in the database. To demonstrate performing a query, the Assets Application will again be used as an example. Almost identical querying capabilities are present in every Maximo application.

Step 1: Navigate to the Assets Application.

Within the application, the List tab allows the user to create simple or more complex searches and then save these searches for later use. Once the desired search results are obtained, these results can be downloaded to Microsoft Excel™ for further reporting and manipulation.

Step 2: On the List tab, click in the Asset field to search.

Click on the magnifying glass in the toolbar just above the column headings to search. In this case, Maximo is performing a search of records using only the application search defaults (set by the Administrator) for the query, with no added filters from the user.

The user can filter this list based on a series of fields displayed on the List tab such as Description, Location, and more. (Note: If the search field row is not displayed within an application, click on the Filter option to display these fields.)

For most fields, when performing a search within a field the user should type whole or partial numbers or words and then press the Enter key to refine search results. Maximo will look for records where the search string entered matches any portion of the value in the record. Additionally, the user can use wild cards like the % symbol to perform more targeted searches based on the string being at the beginning or end of the value on the record. (For example, search '99%' to find records where the value specifically begins with '99' but has any string of characters after that.) For a full list of available wild cards and their uses, select the 'View Search Tips' option that is available from the Advanced Search drop down menu on each List screen.

Step 3: Enter 'roof' into the Description field and 'JBAB%' in the Location field. Hit the Enter key.

The resulting query will show all records of assets that have the word 'roof' in them and are located in 'JBAB,' shown in Figure 3-9: Asset Query and Result.

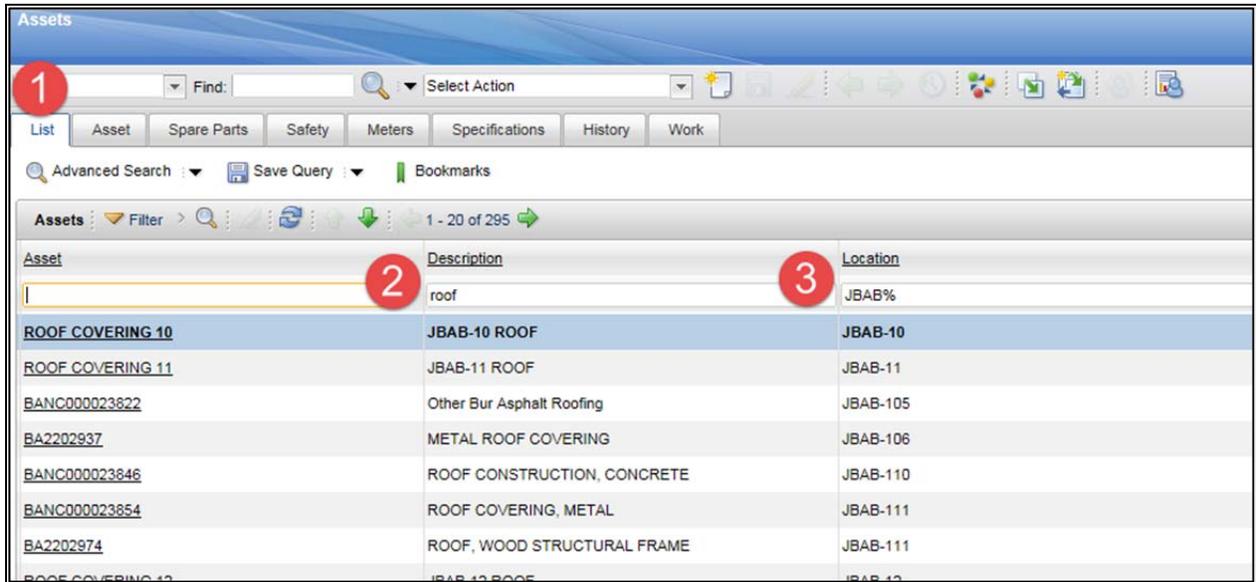


Figure 3-9: Asset Query and Result

3.4.1 Advanced Search

If the search fields displayed on the List tab do not provide enough options for the search, the Advanced Search option will allow the user to reveal additional fields.

Step 1: Click the 'Advanced Search' button  to bring up the screen displayed in Figure 3-10: Advanced Search Screen.

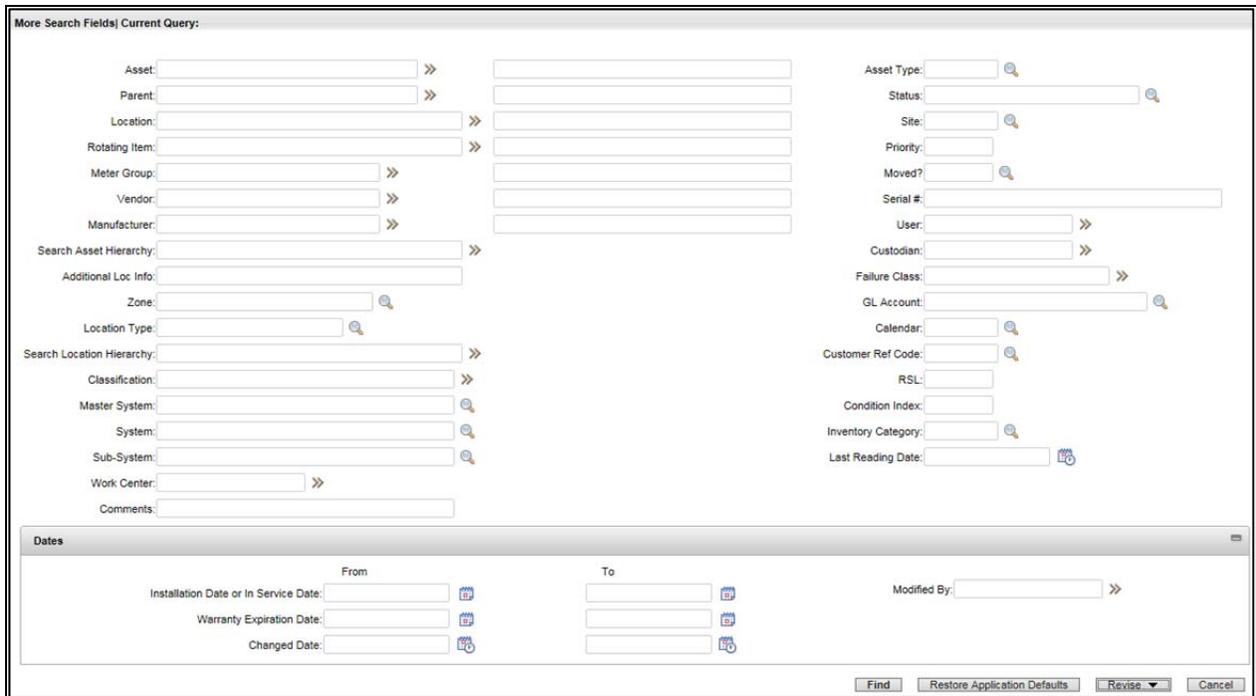


Figure 3-10: Advanced Search Screen

The 'More Search Fields' window allows the user to search across numerous attributes to further refine a search.

Step 2: After applying the desired filters, click on the 'Find' button to create a query result similar to the one displayed in Figure 3-10: Query Result.

3.4.2 Downloading a List to Excel™

The user can download the result of a query list as it is displayed on the screen to a local machine in Microsoft Excel™ format. To do this, follow the below steps:

Step 1: At the far right of the Search Toolbar, select the Download link  **Download**. An Open/Save file window will be displayed.

Step 2: With Open with Microsoft Excel selected, select 'OK.' Microsoft Excel will be launched and the user will be presented with the list in spreadsheet format.

It should be noted, however, that any changes the user makes to a query in Excel are not updated in Maximo.

3.5 Maximo Help

Maximo provides a general Help menu specific to each application that addresses the basic use of Maximo as designed by IBM, but is not specific to NAVFAC. The help provided by IBM is useful for general navigation and can be used to supplement the more detailed descriptions of the fields as utilized by NAVFAC, which are covered in the Modules and Applications sections of this guide.

3.5.1 Accessing Maximo Help Files

Step 1: Select Help from the Navigation Bar, and then select the Maximo Asset Management Help option. This brings up a new browser window or tab with general help for Maximo.



Figure 3-11: Navigating to Help Files

The user is brought to the Tasks tab, where information displays on common tasks performed in Maximo.

Step 2: From here, the user can drill in to additional information across a variety of Maximo topics.

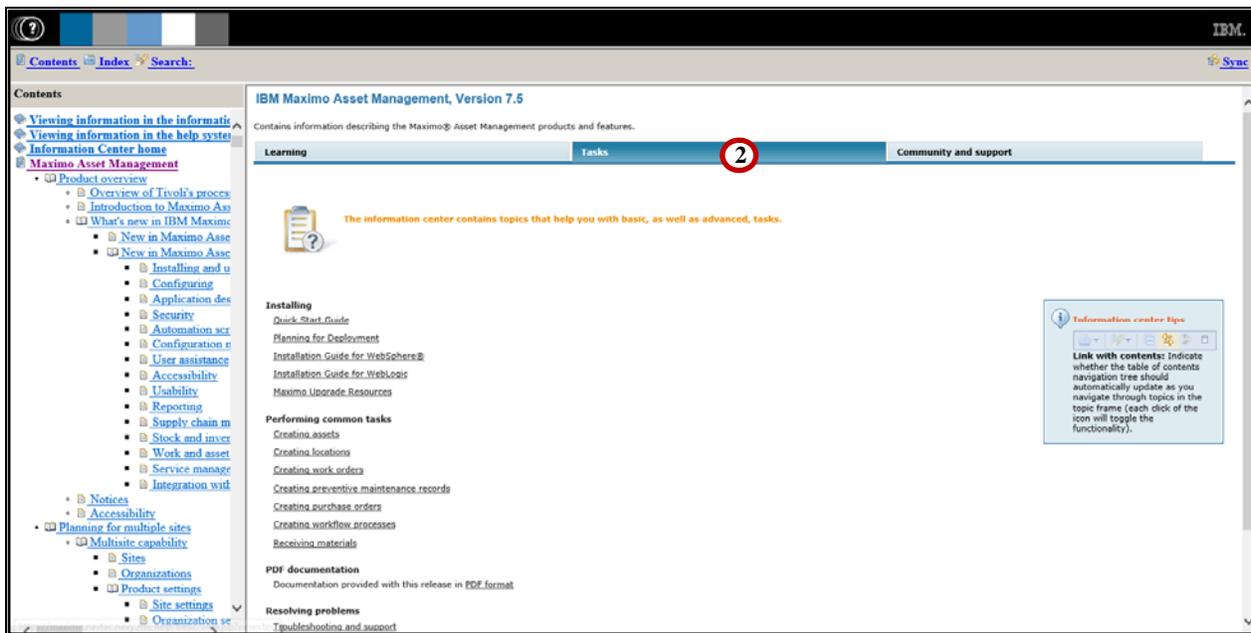


Figure 3-12: Help Page for Common Task

4 REPORTS AND DATA OUTPUT FROM MAXIMO

Within various applications in Maximo, pre-configured Reports can be run as Ad hoc Queries (Query by Example (QBE), Query Based Report (QBR) and Key Performance Indicators (KPIs)). Many reporting needs can be resolved through the Maximo program directly using its extensive reporting capabilities. Numerous Attributes are available within each application allowing a user to find data directly on an object or in related objects. In this section, we will cover QBR, KPI, and running standard reports. (Note: QBE, or searching via the List tab, was covered in an earlier section.)

Additional resources for organization and output of data, including metrics, from Maximo using external system and software tools are reviewed in chapter 4.4.

4.1 Creating a QBR (Query Based Report)

Ad hoc, or Query Based Reporting (QBR), enables the user to quickly create custom reports from any application. Within the applications, the user has access to Ad hoc Reporting via Toolbar icon. The type of report can then be selected in addition to the fields to display, and whether to group and sort the results. Additionally, unique report parameters can be defined along with how the report will execute against the application's record set.

There are options to save and share the reports with others, or determine that it is only needed for one-time usage. When this report is saved, it can be scheduled and automatically emailed to the user or a number of users just like standard enterprise reports. The report can also be downloaded to other file formats like Microsoft Excel for additional analysis, demonstrated in [chapter 3.4.2](#).

This exercise creates a Query Based Report (QBR) to generate a report of details from a Work Order. The Work Order Tracking application is used for this example.

Step 1: Using the 'Go To' Menu, select Work Orders and then Work Order Tracking.

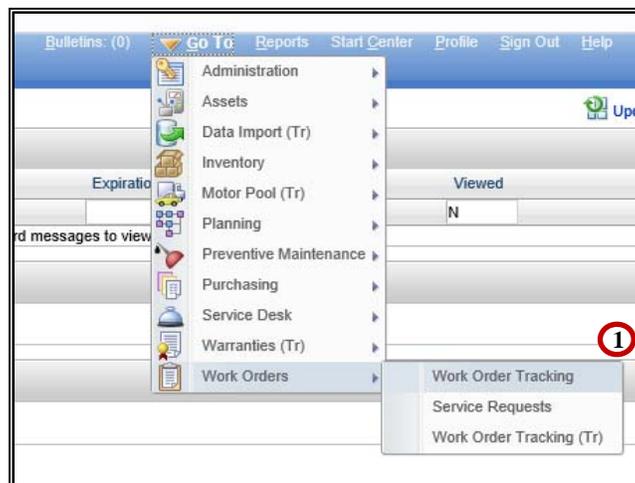


Figure 4-1: Work Order Tracking

Step 2: Using what was learned in [chapter 3.4](#) of this guide, run a search on the List tab for a set of Work Order records.

Results for the QBR can be limited to data identified by this search.

Step 3: Select Run Reports from the Select Action menu.

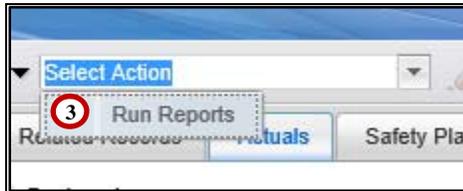


Figure 4-2: Running Reports

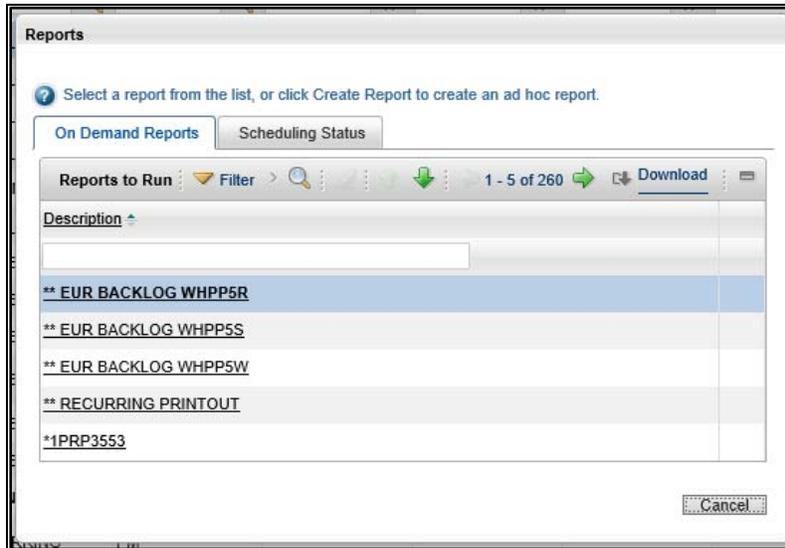


Figure 4-3: Reports Window

From the displayed Reports window, users are able to select out-of-the-box Maximo reports and previously created QBRs. These previously created QBRs may be reports created by the logged-in user or by others.

4.2 Running Standard Reports

This section reviews basic reporting functionality related to accessing reports. Reports can be assessed immediately or based on a schedule. NAVFAC reports are run on a replicated database. In addition, there may be parameters that the user can select to limit the report such as a parameter indicating that data should only be pulled from one site. This example will use Work Order Tracking to illustrate these points.

Step 1: Access the Work Order Tracking application by selection is from the 'Go To' or Favorites Menu.

Step 2: The Work Order Details report will be accessed here. Because this report tends to display a great deal of information, the number of Work Orders that can be displayed with this report has been limited. If requests are too large, the user will receive a System Message because a maximum of 50 Work Order records can be accessed at a time. If the user does not limit the request, Maximo attempts to bring up all Work Orders for the Work Order Details report. This setting is established through the Report Administration application.

Step 3: Search for the Work Order Record that you wish to run the report on.

Step 4: Select Run Reports from the Select Action menu.

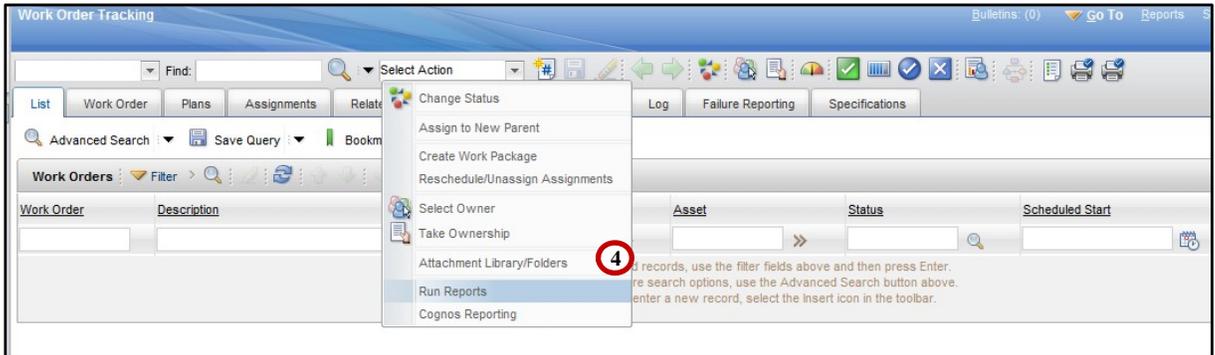


Figure 4-4: Running Standard Reports

Step 5: First, notice that there are numerous available reports if the user filters or uses the search bar. The user has access to both standard Maximo reports (either delivered ‘out-of-the-box’ or customized) and QBRs that they created or that were made public by another User.

Step 6: Also, note that Maximo defaults to the On Demand Reports tab. These reports when selected will be accessed immediately. The User could also click on the Scheduling Status tab and view reports scheduled to run at a specified time.

Step 7: Type ‘NAVFAC Work Order Details’ in the Search bar, initiate the search by clicking the magnifying glass, and a select a search result the to navigate to this report. Click the report to select it.

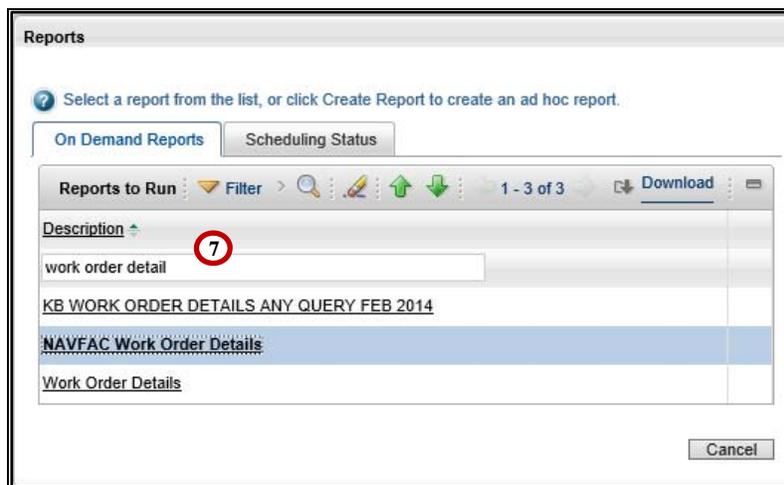


Figure 4-5: Work Order Details Report

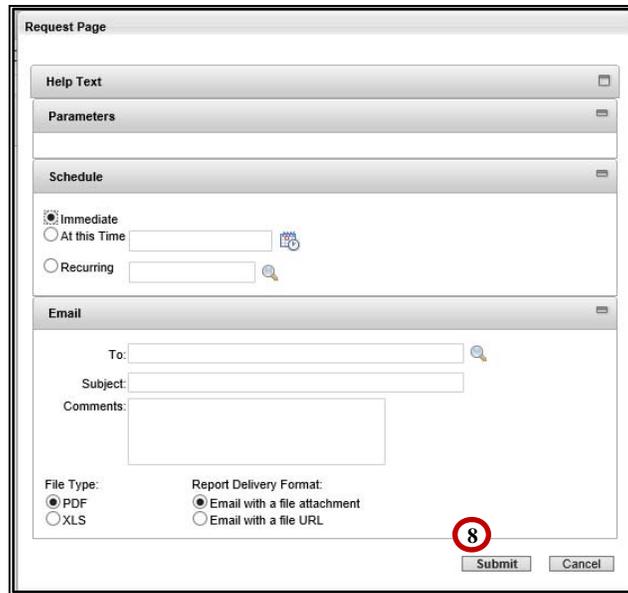


Figure 4-6: Standard Reports - Request Page

Step 8: Click on the Submit button on the Request Page window.

Step 9: Give the report a moment to generate; it will pull up in a separate window.

Step 10: Click on the Export Data tool button on the report.



Figure 4-7: Exporting Data from a Report

Step 11: From the Export Data window, the User is able to select specific fields from the report to export. The data from the report will be exported in a CSV format. Click OK.

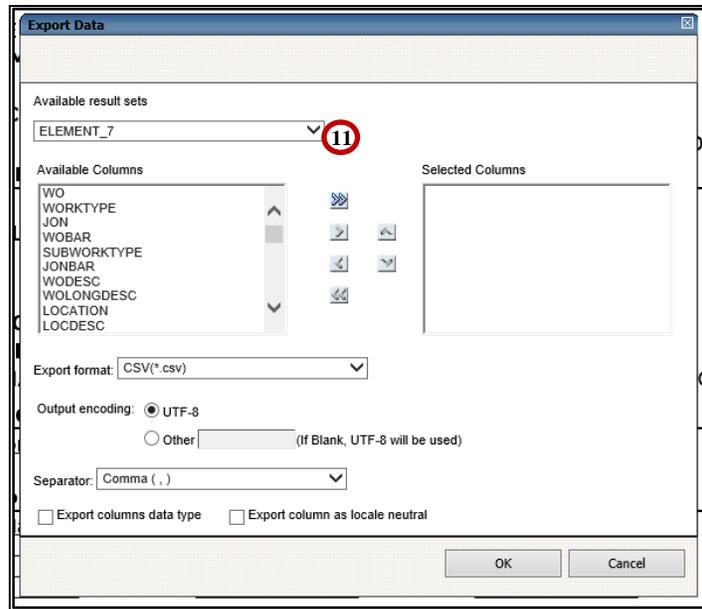


Figure 4-8: Exporting Data from Reports to Excel

Step 12: Click on the Export Report tool button on the report screen.



Figure 4-9: Reporting Toolbar

Step 13: From the Export Report window, the User is able to export the report into many formats including ‘.ppt’, ‘.pdf’, and ‘.doc’ formats. In addition, specific pages can be exported as opposed to the entire report.

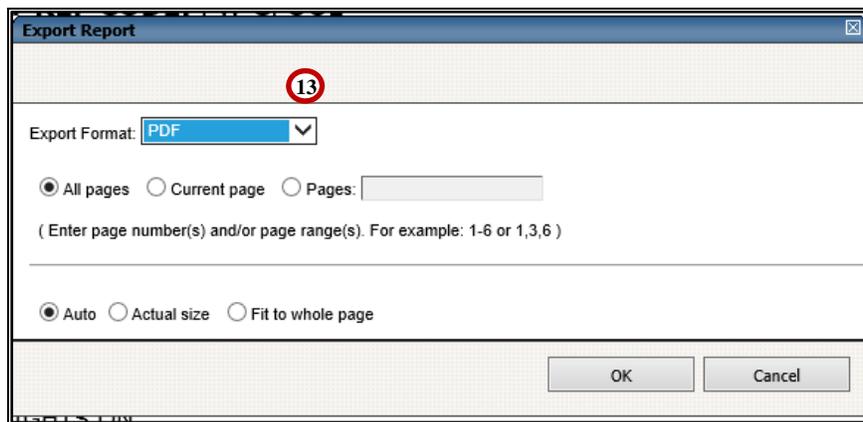


Figure 4-10: Exporting a Report

4.3 Scheduling a Report

Scheduling a report allows for records to be stored at standard time.

Step 1: Open the Report again through the Select Action menu. Based on security permissions, some users may not have this capability.

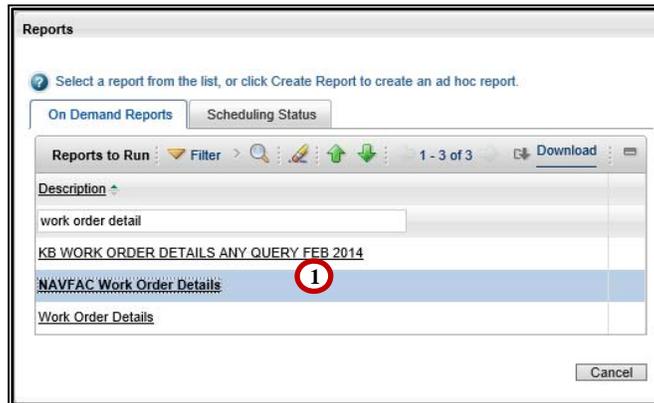


Figure 4-11: Scheduling a Report

Step 2: From the Request Page, a report can be run, at a particular time, or on a recurring basis. Select Recurring, type in an email address for the report to send to, the type of report (pdf or xls), and click on the magnifying glass icon next to the 'Recurring' field.

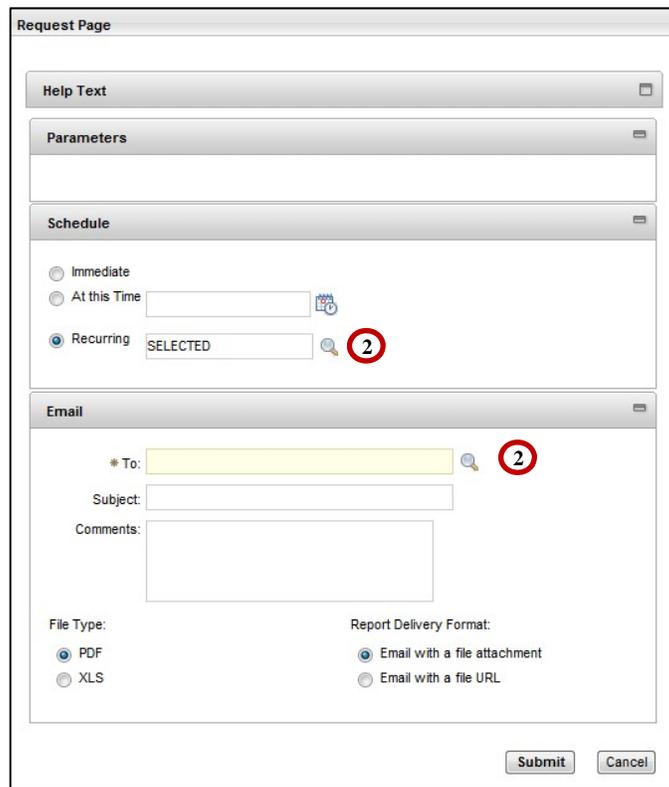


Figure 4-12: Scheduling a Recurring Report

Step 3: From the displayed Select Value window, set the time at which you would like the report to be emailed to the email address you placed on the request page.

Step 4: Click OK.

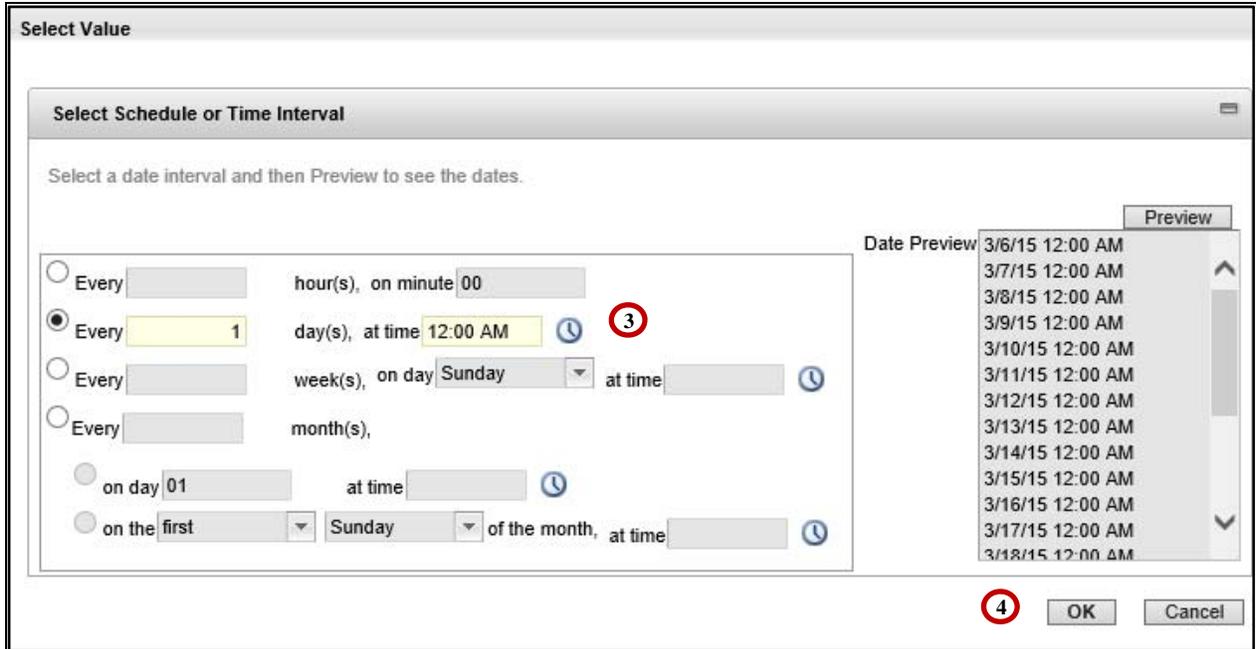


Figure 4-13: Scheduling a Time for a Recurring Report

Step 5: Click on Submit on the Request page.

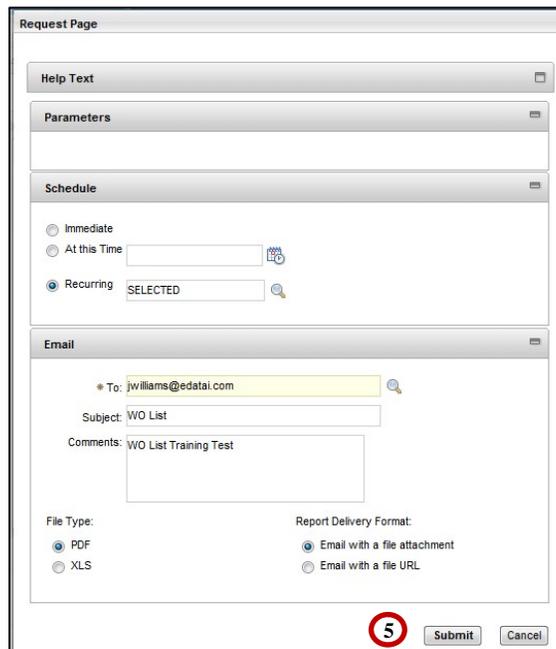


Figure 4-14: Report Request Page

To view Scheduled reports, the user should return to the main Reports window and access the Scheduling Status tab. From the Scheduling Status tab, the user is able to modify schedules for reports or delete scheduled reports.

4.4 Other Maximo Reporting Tools and Maximo Replicated Production (MARP)

Due to the large number of users and single hosting center, Maximo ad hoc reports are somewhat limited in the production environment. To provide users with the ability to develop insights from the data collected in Maximo, there are several system tools and additional software tools available. Maximo makes a copy of all data from production (where users are working) every thirty (30) minutes to a replicated environment – **MAximo Replicated Production (MARP)**. MARP offers two primary ways to support report and business analysis:

COGNOS® – Cognos is IBM's business intelligence (BI) and performance management software suite. The software is designed to enable business users without technical knowledge to extract corporate data, analyze it and assemble reports. COGNOS maintains data copied from multiple NAVFAC Business systems. Account access can be requested via STS. COGNOS has hundreds of reports prepared and available for use. COGNOS access can be requested using STS following the same process as Maximo covered in chapter 2.1.2.

NAVFAC has created a series of reports in COGNOS, using Maximo and other business system data to provide metrics and performance indicators in a standard format, with performance shown at the PWD, FEC or Echelon 3 level. A Metrics Guide for FEC Operation Metrics is available on the NAVFAC Portal which describes key reports; however additional reports are available within COGNOS.

MARP access via CITRIX®. Access to select FEC/NAVFAC personnel is provided to access MARP. Because of the level of access provided, the business data is restricted. Using CITRIX® several software tools such as Microsoft Access™, Tool for Oracle Application Developers (TOAD®) to execute SQL command to organize and report data. Because you will be operating at the database level, only users with a strong and advanced knowledge of Maximo are authorized for CITRIX® access.

RECOMMENDATION: As you learn Maximo, contact your supervisor, peers or FEC Maximo point of contact if you have specific reporting needs. The FEC POCs often have or are aware of an existing report that will meet your needs.

5 MODULES

Sections 5.1 to 5.5 provide an overview of the Service Request, Assets, Locations, Work Order and Preventive Maintenance applications. They include objectives, roles and responsibilities and basic processes of the applications. As the process of submitting a request is explained, there will be screenshots with explanations of fields to follow in addition to indicators of required fields.

The below key will be used throughout the modules in the process screenshots.

Notation	Meaning
	Orange Box – Indicates that the field being highlighted is required to approve the form or request that the user is populating
Request Type: <input type="text" value="SERVICE"/>	Gray Box (Read Only Information) – Indicates that the field is pre-populated for the user based on the user’s account, value from an associated record, or that it is no longer editable based on the status of the record.
* Location: <input type="text"/>	Red Box – Indicates that this is a required field to save/approve
*	Asterisks – Indicates that this field is a Required Field to save the record.
+	Plus sign – In the Service Request Application, this is a required field to APPROVE.
 or 	Hexagon or Square Lettering –Labels the fields described in the description tables

Table 5-1: Module Notation Key

5.1 Locations Module

5.1.1 Module Overview

Locations and location hierarchies represent functional areas of an organization. Locations are used to track movement of assets from place to place. Locations are static areas, while assets might move to various locations. Work orders and tickets are tracked by location and the costs can be tracked to either the location or asset. Some locations are virtual, rather than physical.

Use the Locations Application to specify and to track locations for assets. The user can also organize locations into logical hierarchical systems or network systems. Using hierarchies or systems of locations and specifying the locations for assets on an asset record provides the groundwork for gathering and tracking information about the history of an asset, including its performance at specific sites, as it is moved from location to location. With locations organized into systems, the user can quickly find a location on the Drilldown page, and identify the asset at that location.

Use the Locations application to perform the following functions:

- Search for locations, saved queries, and bookmarks
- View or specify detailed information specific to a location
- View the history of, move transactions into and out of a selected location
- View, modify, add, or delete safety records associated with a selected location
- Associate a meter group with a location, and add and remove meters from a location
- Type or view the specifications for a location as recorded in the Classifications application
- View assets at a selected location

5.1.2 Module Application Tabs

Within each Application, there are several tabs that are required to be populated in order to approve as shown in Figure 5-1: Location Application Tabs. Table 5-2: Location Tab Descriptions describes the uses for the tabs within the Locations Module.



Figure 5-1: Location Application Tabs

Tab	Description
Location	Auto-populated based on associated asset records.
NFA	Auto-populated based on associated asset records.
NFA Master	Auto-populated from pull from iNFADS if the FACILITY ID field is populated on the Location tab and matches a value in iNFADS.
Assets	Auto-populated based on associated asset records. Used to view a red-only list of assets that have the current record listed as a value in their Location field.
History	Auto-populated based on associated asset movements from one location to another or from one parent to another.
Safety	Unused at this time
Specifications	Unused at this time

Table 5-2: Location Tab Descriptions

5.1.3 Business Objective

The objective of the locations application is to identify a geographical point for groups of assets and related work requirements and to manage the accumulative costs and condition of assets and systems.

5.1.4 Critical Success Factors

The factors that contribute to the success of the Locations Application include:

- iNFADS data exchange, accurate asset correlation

An important concept within Maximo is the mapping of Locations to Assets. Maximo's use of these terms varies from other NAVFAC business systems, and may be a source of confusion to new Maximo users. Maximo establishes a hierarchical location structure that maps from NAVFAC's multiple organizational levels to a location on the installation (i.e. – a building). The hierarchy begins with NAVFAC as a whole, moves to the greater component commands and then into the FECs. Once the user is at the FEC level, a specific base location can be selected from a list which will then pull up a series of buildings. From here, the user should select the building that contains the asset needing to be addressed. Figure 5-2: Location Hierarchy, below, shows an example of the drilldown of the location hierarchy within the Location Application.

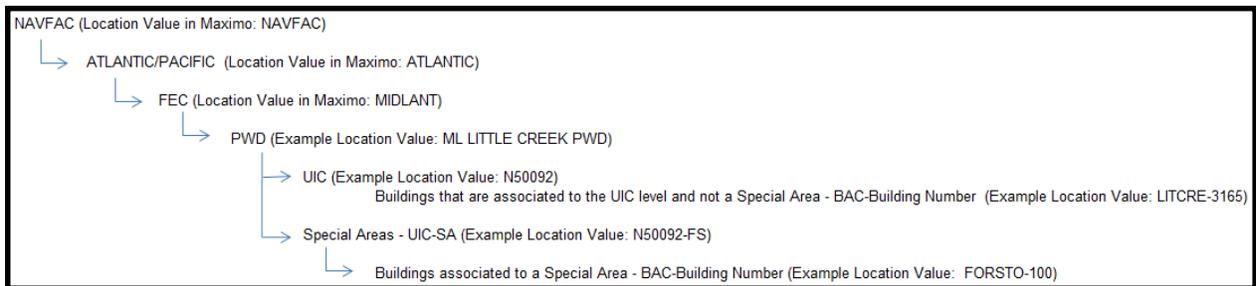


Figure 5-2: Location Hierarchy

5.1.5 Key Roles and Responsibilities

- **Identifier:** Creates the record, associates it to the iNFADS Facility Identity (NFAID) and system and in proper hierarchical order
- **Reviewer:** Monitors the condition index (CI) and the facility condition index (FCI) for accuracy

5.1.6 Process

The following section contains descriptions and screenshots of the Location tab, the main source of information collection within the Locations Module. [Note: the ability to add/modify a location record is restricted to a few people within the FEC] The screenshots and tables throughout include instructions and descriptions of required information to approve and save the tab. The required fields (*) to save a new location on the Location tab are highlighted below:

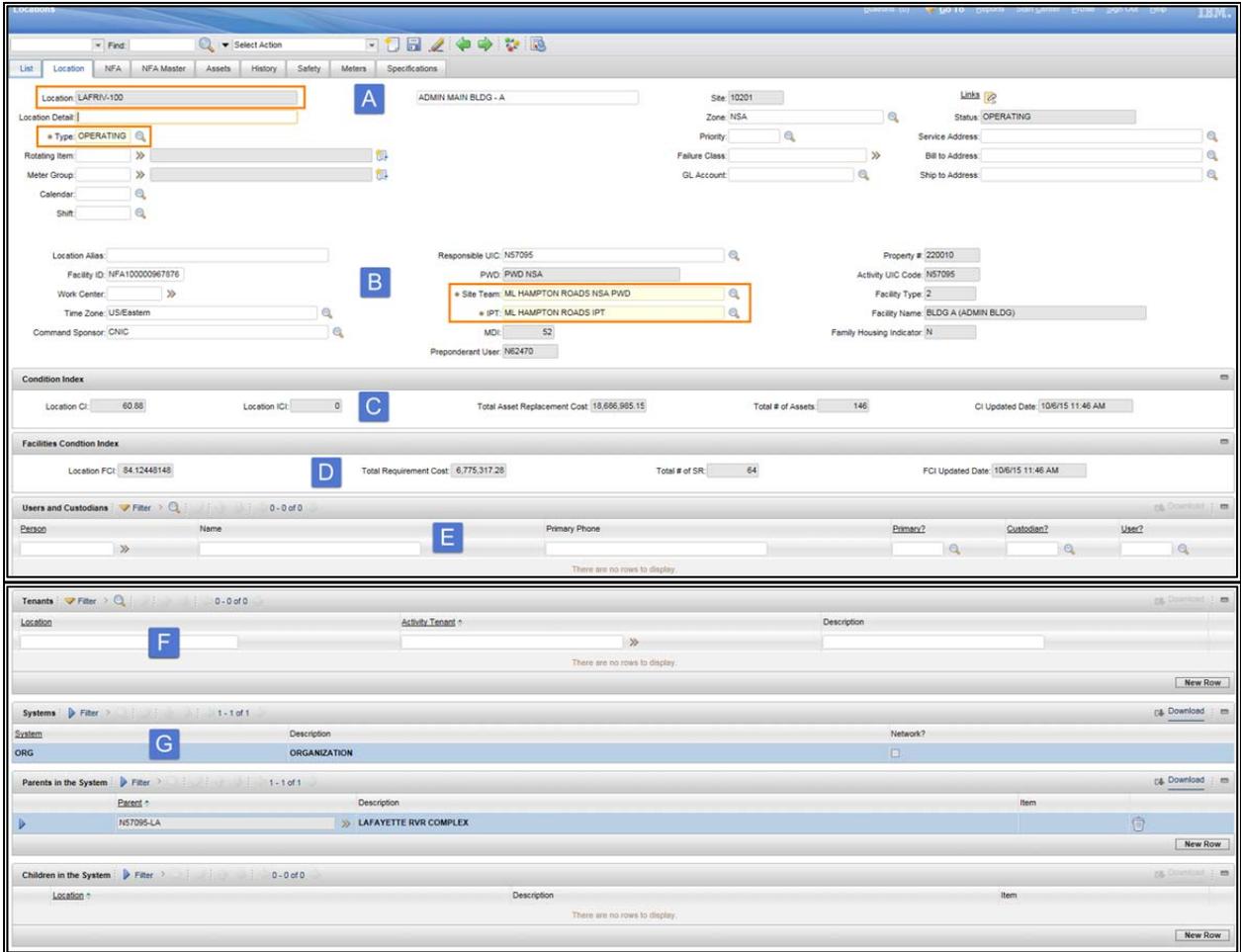


Figure 5-3: Location Tab, required fields to save highlighted

The minimum required fields needed to save/create a Location are as follows:

To **APPROVE** the Location tab, complete the following fields:

1. Location
2. Type
3. Site Team
4. IPT

To **associate a location with Service Requests and Assets**, the following fields need to be completed:

1. Responsible UIC
2. System (Org, UEM, BSVE)
3. Parent (to establish hierarchical order)

For more detailed instruction on completing the Locations tab, follow the screenshots and steps that follow.

Detailed Descriptions of Location Fields:

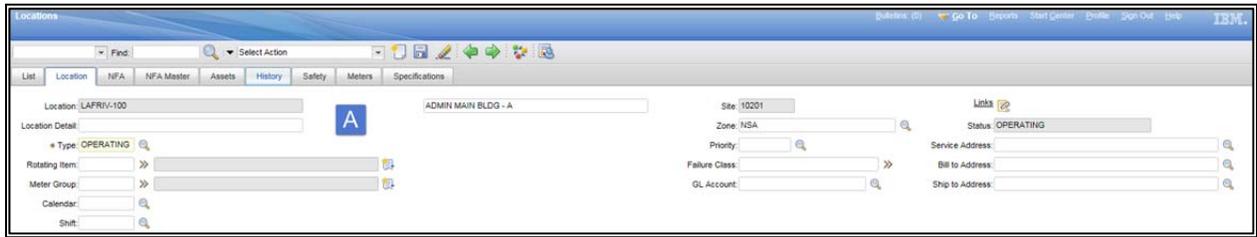


Figure 5-4: Location Tab – Section A

Section	Title	Description
A Location, Part 1	Location	On creation, the value must be created manually.
	Location Detail	Additional location detail
	*Type	Type of location. Select from value list – normally OPERATING
	Rotating Item	Not commonly used by NAVFAC, identifies an asset that may rotated to multiple locations.
	Meter Group	*Field is not currently used. All meters belonging to this location's metergroup are automatically associated with this Location in the LocationMeter object. Additions to the meter group can also be added to this Location in the LocationMeter object.
	Calendar	The operating hours of the facility. If used locally, select from the value list.
	Shift	The operating shift for the location. If used locally, select from the value list.
	Site	Auto-populated from a previous screen - FEC designator
	Zone	Geographic Identifier
	Priority	The location criticality, as determined by the owner on a scale from 1-10.
	Failure Class	Unused at this time.
	GL Account	Default tenant funding stream. Value will auto-populate on Service Request records, if the asset was associated to the service request creation.
	Status	Auto-populated from a previous screen - Operating status of Location record
	Service Address	Unused at this time.
	Bill to Address	Default Bill To Address Code (may only apply to store room locations).
Ship to Address	Default address to ship items to when reorders are processed for this storeroom. Click the Select Value button to choose a shipping code (may only apply to store room locations).	

Table 5-3: Field Descriptions on the Location Tab for Section A

Figure 5-5: Location Tab – Section B

Section	Title	Description
B Location, Part 2	Location Alias	Location Alias
	Facility ID	Unique number given to each item of real property in iNFADS, aka NFAID.
	Work Center	Default assigned group responsible for maintaining the location.
	Time Zone	Time Zone
	Command Sponsor	The HQ-level organization supporting or providing funding for work associated to location.
	Responsible UIC	UIC responsible for funding sustainment/restoration & modernization costs incurred for a location.
	PWD	Name of the PWD (used in COGNOS reports)
	*Site Team	PWD Team responsible for the execution of work if routed to PWD.
	*IPT	IPT Team responsible for the execution of work if routed to IPT.
	MDI	Auto-populated from the NFAMASTER screen - Describes relative importance of infrastructure in terms of mission criticality (scale of 1 to 100) which is pulled from iNFADS.
	Preponderant User	Auto-populated from the NFAMASTER screen - Activity that occupants the largest percentage of the location.
	Property #	Auto-populated from the NFAMASTER screen - A two-part identification number permanently assigned to a facility which is pulled from iNFADS.
	Activity UIC Code	Auto-populated from the NFAMASTER screen - The UIC of the Navy shore activity where the real property resides which is pulled from iNFADS.
Facility Type	Auto-populated from the NFAMASTER screen - Term indicating land, building, structure, utility, temporary facilities which is pulled from iNFADS.	
Facility Name	Auto-populated from the NFAMASTER screen - Name assigned to a facility, other than its cat code nomenclature which is pulled from iNFADS.	
Family Housing Indicator	Auto-populated from the NFAMASTER screen - Y/N designator specifying whether or not a facility is a family housing unit which is pulled from iNFADS.	

Table 5-4: Field Descriptions on the Location Tab for Section B



Figure 5-6: Location Tab – Section C and D

Section	Title	Description
C <i>Condition Index</i>	Location CI	Auto-populated from a previous screen - Measure of a location's physical condition at a specific point in time. Eventually will be updated by BUILDER, based on the curve of the associated assets.
	Location ICI	Auto-populated from a previous screen - Measure of a location's physical condition at a specific point in time.
	Total Asset Replacement Cost	Auto-populated from a previous screen - Sum of the associated assets replacement costs.
	Total # of Assets	Auto-populated from a previous screen - Count of associated assets.
	CI Updated Date	Auto-populated from a previous screen - Current date an associated asset's meter reading was modified.
D <i>Facilities Condition Index</i>	Location FCI	Auto-populated from a previous screen
	Total Requirement Cost	Auto-populated from a previous screen
	Total # of Service Requests	Auto-populated from a previous screen
	FCI Updated	Auto-populated from a previous screen

Table 5-5: Field Descriptions on the Location Tab for Sections C and D

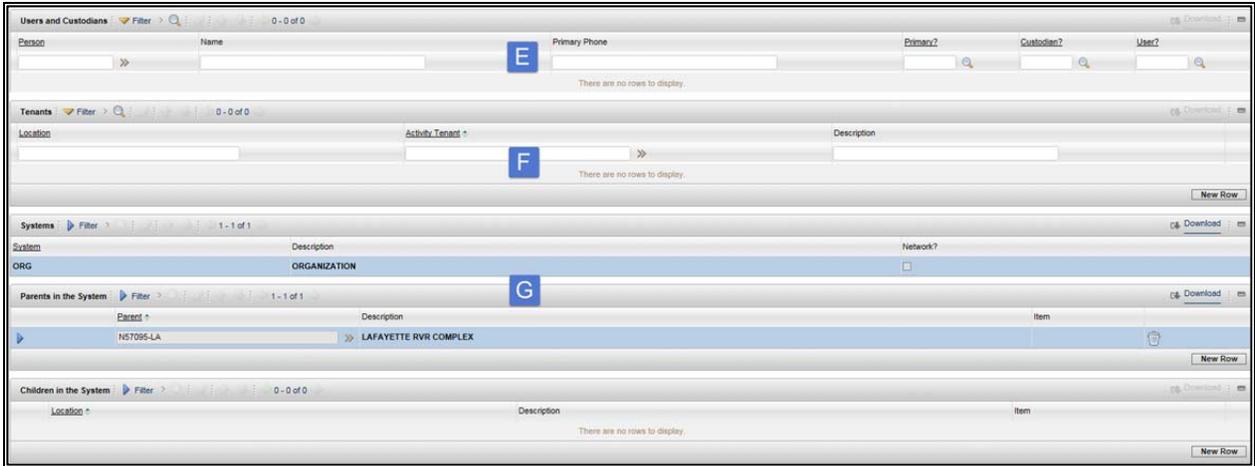


Figure 5-7: Location Tab – Section E, F and G

Section	Title	Description
E <i>Users and Custodians</i>	Person	Specifies the labor code of the inventory manager for this store room.
	Name	The user's name.
	Primary Phone	The primary phone number where the user can be reached.
	Primary?	Checks if user is the primary point of contact.
	Custodian?	Person ID in the Affected Person field is associated with the location as a location custodian.
F <i>Tenants and Systems</i>	Location	Identifies the Location.
	Activity Tenant	Used with location to identify area managed by tenant. Generally used when location has multiple tenants.
	Description	Description of the location.
G <i>Parents/Children in the System</i>	Parent	Parent Location found in the system.

Table 5-6: Field Descriptions on the Location Tab for Sections E, F and G

5.1.7 Relevant Corporate Guidance or Documentation in the Appendix

Documentation hosted on the NAVFAC Portal at: <https://hub.navyfac.navy.mil>

[B-15.1.6 NAVFAC EXWC Airfield Pavement Program](#)

[B-15.1.7 NAVFAC EXWC Roads & Parking Lots](#)

[B-15.1.8 Airfield Linear Segmentation](#)

[B-15.15 Trackage Certification](#)

[B-15.21 Trackage Audits](#)

[B-15.33 Electronic Operation and Maintenance Support Information \(e-OMSI\)](#)

5.2 Service Desk Module

5.2.1 Module Overview

The Service Desk module is used by NAVFAC to manage requests for services that involve an asset or location across the FECs and regions and is the only method to start the work induction process. The Service Desk plans, reviews, and manages activities and tasks received from Service Requestors. For example, there may be a request to replace a light fixture for a user, or set of users, at one or more locations.

The MUG may use the term Service Request (SR) or Service Desk interchangeably. Technically the Service Desk is the module, while the Service Request can be the application (the tab) or a discrete request, record, or 'ticket.'

The Applications used by NAVFAC within the Service Desk Module are as follows:

Application	Description
Service Requests	Used to create work orders related to service tickets or records.

Table 5-7: Service Desk Applications

5.2.2 Module Application Tabs

Within each Application, there are several tabs that are required to be populated in order to approve as shown in Figure 5-8: Service Request Application Tabs. Table 5-8: Service Request Tab Descriptions describes the uses for the tabs within the Service Request application.



Figure 5-8: Service Request Application Tabs

Tab	Description
List	Used to search Maximo for Service Request Records
Service Request	Used to create, view, or modify Service Request Records. It is used to start the work induction process.
Related Records	Used to add, view, or delete related ticket and work order records
Log	Used to create, view and modify Work Log entries and view Communication Log entries
Specifications	Specification templates contain attributes about an item, such as the size, the speed, the material, and the capacity. The list of attributes may define specific information about an item, making it easier to distinguish an item from a similar item.
eProjects	If the request is related to an eProjects ticket, select information from eProjects will be presented here. The information is read-only.
Funds	Funding information based on the General Ledger/Job Order Number used on the ticket is presented here. The information is read-only. If the request has not had a GL account assigned the tab will be blank.

Table 5-8: Service Request Tab Descriptions

5.2.3 Business Objective

NAVFAC uses the Service Desk Module as a means of tracking all service desk interactions with customers: walk up customers, phone calls, e-mail requests, etc. The Service Request Module is used to enter, view, and modify service request records. In addition, the service request can be used to start the work induction process.

5.2.4 Critical Success Factors

The factors that contribute to the success of the Service Request Application include:

- Ensuring there is a definitive owner or point of contact that can be reached for any questions concerning the Service Request
- Ensuring that the Service Request properly documents the issue to be resolved
- Ensuring that the location where the service is being requested is accurately documented

5.2.5 Key Roles and Responsibilities

- Identifier: The individual who identifies the need for the Service Request and provides the required information to ensure enough detail is provided for the request to be resolved.
- Reviewer/Approver: The individual tracking the Service Request will group the Service Requests by similarities or locations, create a plan for completion, and route the Service Request where appropriate. This individual will then track the Service Request throughout its lifecycle.

5.2.6 Process

The following section contains descriptions and screenshots of the Service Request tab, which is the main source of information collection within the Service Desk Module. The screenshots and tables throughout include instructions and descriptions of required information to approve and save the tab. The required fields for Service Request submission (+) and to save (*) are highlighted below:

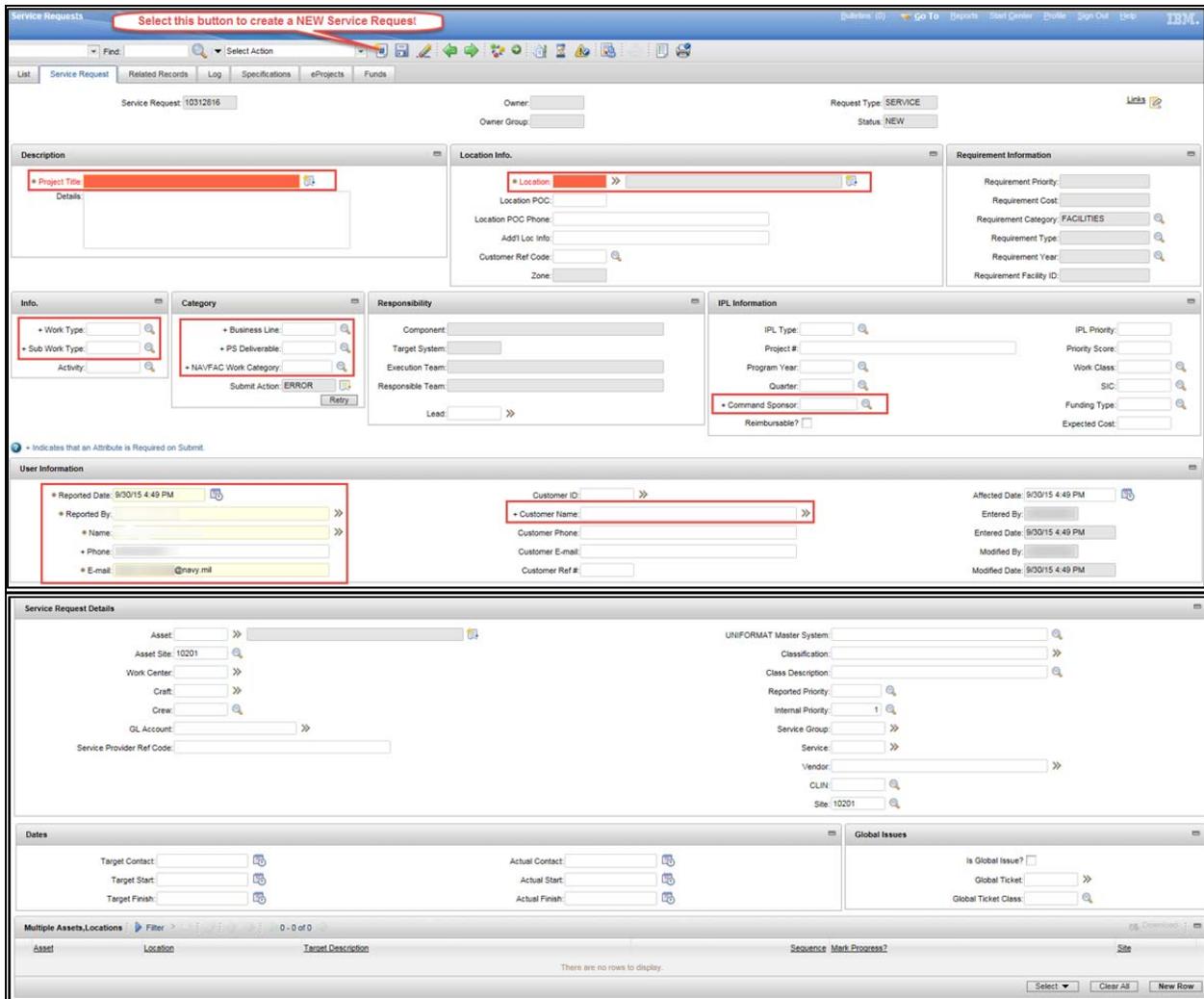


Figure 5-9: Service Request Tab

The minimum required fields to **SAVE** a Service Request, or **APPROVE/WIS** a Service Request are listed below. Many FECs have local instructions with procedures that require additional fields to be entered. NAVFAC is in the process of reviewing the numbers of fields required to **SAVE/APPROVE** Service Requests to support efficiency improvements.

To **SAVE** a Service Request Ticket, the following fields are required:

1. Project Title
2. Project Location

To **APPROVE** a Service Request Ticket for Execution, the additional fields are required:

1. Project Title
2. Project Location
3. Work Type
4. Sub Work Type
5. Business Line
6. PS Deliverable
7. NAVFAC Work Category
8. Reported Date
9. Reported By
10. Name
11. Phone
12. E-mail
13. Customer Name

For more detailed instruction on completing a Service Request, follow the screenshots and steps that follow.

Detailed Descriptions of Service Request Tab Fields:

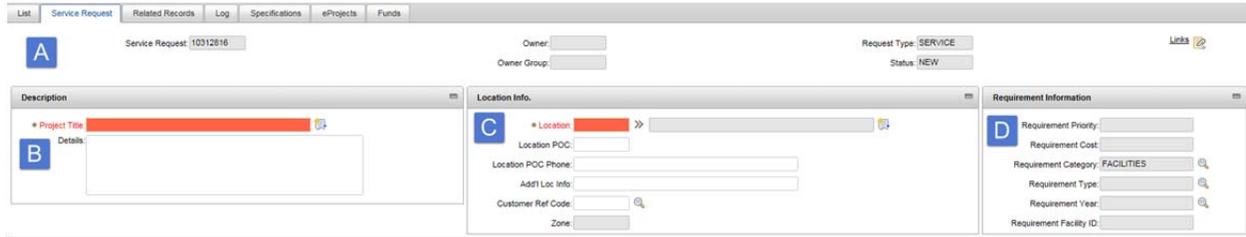


Figure 5-10: Service Request Tab – Sections A, B, C and D

Section	Title	Description
A <i>Service Request Identification Information</i>	Service Request	System Generated Field
	Owner	System Generated Field - This individual holds the overall responsibility for the service request. You can enter a value either in this field or the Owner Group field. Use the Select Action menu to assign an owner. Note: This action may not be available to all users.
	Owner Group	System Generated Field - This group holds the overall responsibility for the service request. You can enter a value either in this field or the Owner field. Use the Select Action menu to assign an owner group. Note: this action may not be available to all users.
	Request Type	System Generated Field - Provide the type of request (e.g. Service).
	Status	This is a system generated field but can be changed manually by clicking the 'Change Status' button in the toolbar. Note: this action may not be available to all users. Default statuses are NEW, QUEUED, PENDING, INPROG, RESOLVED, and CLOSED.
B <i>Description</i>	*Project Title	Provides a brief description of the service request.
	Details	Provides a long description of the service request.
C <i>Location Info.</i>	*Location	Identifies the primary location on the service request. If the service request is for a location, enter its identifier in the Location field or click the Detail Menu button to select an option and retrieve a value.
	Location POC	The location's point of contact.
	Location POC Phone	The point of contact's phone number.
	Add'l Loc Info	Any additional information about the location that you feel necessary to include.
	Customer Ref Code	The organization/department/tenant command that benefits from work.
	Zone	System Generated Field.
D <i>Requirement Information (All information is read only)</i>	Priority	The recommend priority (if any) provided by the SMS or other approved source.
	Cost	The requirement cost as estimated by the SMS – this is not a planned and estimated cost.
	Category	The asset type category – Facilities, Utilities, Structure, etc.
	Type	Requirement type (REPAIR or REPLACE)
	Year	The original year the requirement was recommended by the SM or other approved source. Only Current Year (CY) and previous years are included in the Facility Cost Index (FCI)
	Facility ID	Facility Identification (NFAID) the requirement is associated with

Table 5-9: Field Descriptions on the SR Tab for Sections A, B, C and D



Figure 5-11: SR Tab – Sections E, F, G and H

Section	Title	Description
E <i>Info.</i>	+Work Type	The Work Type applied to the Service Request (i.e. EMERGENCY, URGENT, etc.).
	+Sub Work Type	The Sub Work Type associated to the Service Request, derived from the Work Type.
	Activity	A Navy Command or Group of Individuals within a Facilities Engineering Command (FEC). This field auto-populates when a valid GL Account is applied to the Service Request.
F <i>Category</i>	+Business Line	The Business Line (BL) associated with Service Request.
	+PS Deliverable	Product Service (PS) Code Deliverable associated with the Service Request.
	+NAVFAC Work Category	The work category derived from the BL/PS Deliverable fields that are associated with the Service Request.
	Submit Action	System generated field that indicates whether the Service Request has been submitted.
G <i>Responsibility</i>	Component	System Generated Field - Component Command responsible for the Service Request.
	Target System	System Generated Field - The system that will manage the resulting executable work order record.
	Execution Team	System Generated Field
	Responsible Team	System Generated Field
H <i>IPL Information</i>	IPL Type	Integrated Priority List – Value list used to organize/group requirements.
	Project #	Special Project Number or Local Project Number associated to the Service Request.
	Program Year	The FY that the funding will come from.
	Quarter	The IPL Quarter associated with the Service Request, if applicable.
	Command Sponsor	The HQ/Command providing funding for the work.
	Reimbursable?	Check if not funded by local budget. (Consult local guidance)
	IPL Priority	Priority of service request as determined by the PWD.
	Priority Score	IPL Priority Score associated with the Service Request
	Work Class	Chosen from the drop-down list in Maximo and used in conjunction with IPL Type and Funding Type.
	SIC	Chosen from the drop-down list in Maximo and used in conjunction with the IPL Type, Funding Type, and Work Class codes.
Funding Type	Identifies the Funding Type of the Service Request.	
Expected Cost	The Expected Cost for the Service Request	

Table 5-10: Field Descriptions on the SERVICE REQUEST Tab for Sections E, F, G and H

Figure 5-12: SR Tab – Section I

Section	Title	Description
I <i>User Information</i>	*Reported Date	Identifies the date of the request. Initially auto-populated based on the current date.
	*Reported By	Identifies person making the service request. (Initially auto-populated by the person logged in, but should be updated to the name of the Requestor).
	*Name	Name of person making the service request. Auto-populated.
	+Phone	Telephone number of person making the service request. Auto-populated.
	*E-Mail	E-mail address of person making the service request. Auto-populated.
	Customer ID	Customer ID selected from Value List. Other Customer information will then be auto-populated.
	+Customer Name	Customer Name associated to the Service Request (Auto Populated)
	Customer Phone	Customer Phone associated to the Service Request (Auto Populated)
	Customer E-Mail	Customer E-Mail associated to the Service Request (Auto Populated)
	Customer Ref #	A value used by agreement between the customer and PW for coordination.
	Affected Date	Date when user was affected by issue. Enter a date or click the Select Date button and select a date.
	Entered By	Auto Populated
	Entered Date	Auto-populated
	Modified By	Auto-populated
Modified Date	Auto-populated	

Table 5-11: Field Descriptions on the SERVICE REQUEST Tab for Section I



Figure 5-13: SR Tab – Section J

Section	Title	Description
J <i>Service Request Details</i>	Asset	Enter the asset’s identifier in the Asset field or click the Detail Menu button to select an option and retrieve a value.
	Asset Site	The site location of the person recorded in the Affected User field. Enter a value or click the Select Value button.
	Work Center	The responsibility within the PWD or IPT for approval, oversight, and/or execution of the requirement. In most cases this field also denotes financial tracking, Navy Working Capital, or General Fund. This information may be update based upon the reasonability during the process of validation, approval, and execution.
	Craft	Craft responsible for the Service Request.
	Crew	Crew responsible for the Service Request.
	GL Account	IPL Priority Score associated the Service Request.
	Service Provider Ref Code	The Service Provider Reference Code of the Service Request, if applicable.
	UNIFORMAT Master System	Identifies the UNIFORMAT Master System to the Service Request, if applicable.
	Classification	Class Structure Identifier.
	Class Description	Provide a brief description of the classification structure.
	Reported Priority	Priority of service request as determined by person making the request.
	Internal Request	Priority of the service request as determined by the service desk agent.
	Service Group	Provide the name of the group providing the service.
	Service	Enter the service provided or purchased.
	Vendor	Identify the vendor for the service, service group, or asset.
	CLIN	Contract Line Item Number associated to the Service Request, if applicable.
Site	Unique identifier of the site. Typically this field is locked and pre-populated when an Asset is created.	

Table 5-12: Field Descriptions on the SERVICE REQUEST Tab for Section J



Figure 5-14: SR Tab – Sections K, L and M

Section	Title	Description
K <i>Dates</i>	Target Start	The Target Contact Date associated to the Service Request, if applicable.
	Target Finish	The Target Finish Date for the Service Request.
	Actual Contact	Name of the contract.
	Actual Start	Actual contract date. Enter a date or click the Select Date button and select a date.
	Actual Finish	Actual finish date. Enter a date or click the Select Date button and select a date.
L <i>Global Issues</i>	Is Global Issue?	Flag used to determine if a Ticket/Service Request is a Global Issue.
	Global Ticket	Global Ticket ID.
	Global Ticket Class	Identifies the Class of the global ticket.
M <i>Multiple Assets, Locations</i>		Click 'New Row' to enter multiple Assets, Locations.

Table 5-13: Field Descriptions on the SERVICE REQUEST Tab for Sections K, L and M

5.2.7 Relevant Corporate Guidance or Documentation in the Appendix

Documentation hosted on the NAVFAC Portal at: <https://hub.navyfac.navy.mil>

[B-15.2 Preventive Maintenance](#)

[B-15.6 Proper Work Classification](#)

[B-15.17 Work Tracking](#)

[B-15.27 Facility Emergency, Urgent, and Routine Service Request and Work Order Process](#)

[B-15.37 Ownership of Metrics](#)

[B-24.5 Energy Audit Data Collection](#)

5.3 Work Order (WO) Module

5.3.1 Module Overview

A Work Order specifies a particular task and the labor, materials, services, and tools required to complete the task.

The Applications used by NAVFAC within the Work Order Module are as follows:

Application	Description
Work Order Tracking	Used to perform every function related to Work Orders including scheduling and labor reporting.
Service Requests	Used to create records of customer calls or e-mail requesting service
Work Order Tracking (Tr)	Work Order Tracking as it is applied to Transportation

Table 5-14: Work Order Applications

5.3.2 Module Application Tabs

Within each Application, there are several tabs that are required to be populated in order to approve as shown in Figure 5-15: Work Order Application Tabs. Table 5-15: Work Order Tab Descriptions describes the uses for the tabs within the Work Order Application.



Figure 5-15: Work Order Application Tabs

Tabs	Description
List	Used to search Maximo for work order records.
Work Order	Used to create, view or modify work orders, view identifies for an applied job plan and safety plan, view PM and scheduling information. If the work order is a follow-up work order, you can view the identifier of its originating work order. You also can identify the failure hierarchy for the work asset.
Plans	Use to enter, view, or modify information on work orders in a hierarchy, and to enter, view, modify, or delete information about planned job tasks, labor materials, services, and tools.
Assignments	Used to enter, view, or modify work assignments on the work order.
Related Records	Used to enter, view or modify actual work order start and finish times, labor hours and costs, material quantities, service costs, and tool costs.
Actual	Used to add, view, modify or delete safety information associated with a work order.
Safety Plan	Used to associate safety plans to the work order.
Log	Used to create, view, edit and delete Work Log entries, and view Communication Log Entries.
Failure Reporting	Used to enter, view or modify asset and location failure information to help identify trends.
Specifications	Specification templates contain attributes about an item, such as the size, the speed, the material, and the capacity. The list of attributes may define specific information about an item, making it easier to distinguish an item from a similar item.

Tabs	Description
eContracts	If the work order required material or services purchased via eContracts, select information from eContracts will be presented here. The information is read-only.
Funds	Funding information based on the General Ledger/Job Order Number used on the ticket is presented here. The information is read-only. If the request has not had a GL account assigned the tab will be blank.

Table 5-15: Work Order Tab Descriptions

5.3.3 Business Objective

Work Order tracking is an application to plan, manage, monitor, and execute work. Elements of this include cost, status, and performance metrics. In addition, this application is used to generate contract requirements (ECR) and track UM (UEM) outages.

The Standardization Goals include:

- All IPL's to be captured within the service request application
- Standardize the way that the IPL fields are used across all FECs regardless of application
- Standardize how the FSC and BOSC data is captured
- Utilize the safety and precaution tabs within Maximo
- Standardize and document the definition of work order statuses and requirements for use
- Implement guidelines and standards for work order aging
- Address the issues where materials have been received, but by system rules it still displays as awaiting materials – Receiving Application issue
- Cradle-to-grave work order processing

5.3.4 Critical Success Factors

The factors that contribute to the success of the Work Order Application include:

- A well-defined Service Request
- A specified Location
- Having the Requirement clearly outlined
- A clear Point of Contact
- The Customer
- The responsiveness of the Owner
- Timely data updates
- Funding
- Asset identification

5.3.5 Key Roles and Responsibilities

- Identifier: Work Management (Status updates, work assignment, labor/material charges, meter readings (DCR))
- Reviewer: Historical Review (Corporate metrics)

5.3.6 Process

The following section contains descriptions and screenshots of the Work Order tab, which is the main source of information collection within the Work Order Module. The screenshots and tables throughout include instructions and descriptions of required information to approve and save the tab. The required fields for Work Order Tab Submission are highlighted below:

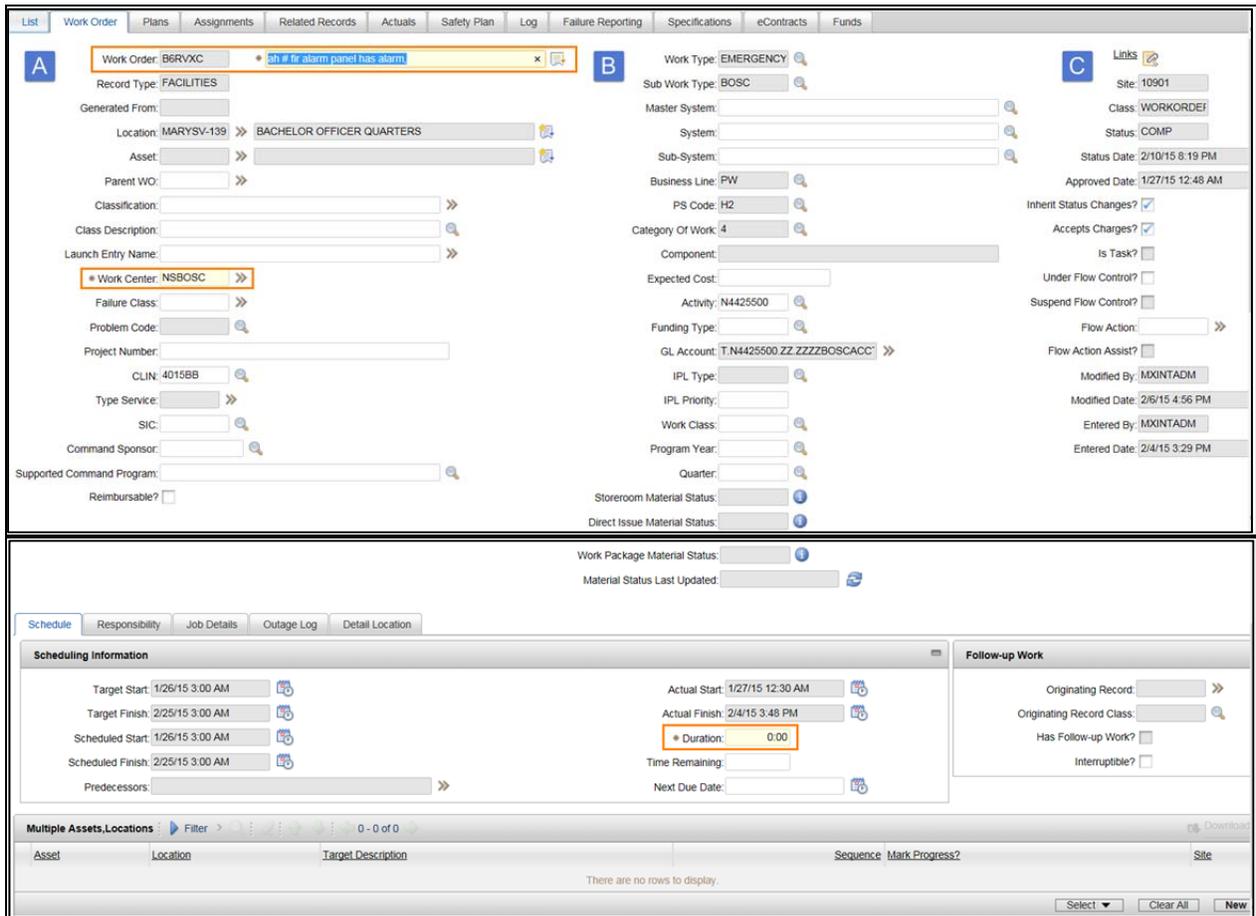


Figure 5-16: Work Order Tab

The minimum required fields to SAVE a Work Order, or APPROVE a Work Order are listed below. Many FECs have local instructions with procedures that require additional fields to be entered.

To **SAVE** the Work Order, complete the following fields:

1. Work Center

To **APPROVE** the Work Order, complete the following fields:

1. Work Order
2. Work Center
3. Duration

Additionally Recommended fields:

1. Work Type
2. Sub Work Type
3. Approved Date
4. Actual Start Date
5. Complete Date
6. Target Completion Date

- 7. Target Start Date
- 8. Estimated labor hours
- 9. Estimated labor cost
- 10. Estimated material
- 11. Outage

For more detailed instruction on completing the Work Order tab, follow the screenshots and steps that follow.

Detailed Descriptions of Work Order Fields

The screenshot displays the 'Work Order Tracking' interface with the following fields:

- Section A:**
 - Work Order: B83NL4
 - Record Type: FLEET
 - Location: NORFOLK-BE
 - Asset: N9475658
 - Parent WO:
 - Classification:
 - Class Description:
 - Launch Entry Name:
 - Work Center: WAMP74
 - Failure Class:
 - Problem Code:
 - Project Number:
 - CLIN: FFP
 - Type Service:
 - SIC:
 - Command Sponsor:
 - Supported Command Program:
 - Reimbursable?
- Section B:**
 - Work Type: BSVE_MAINT
 - Sub Work Type: PM
 - Master System:
 - System:
 - Sub-System:
 - Business Line: PW
 - PS Code: X48
 - Category Of Work: 3
 - Component:
 - Expected Cost:
 - Activity: N4008500
 - Funding Type:
 - GL Account: A,N4008500.70.4034510A2012
 - iPL Type:
 - iPL Priority:
 - Work Class:
 - Program Year:
 - Quarter:
 - Storeroom Material Status:
 - Direct Issue Material Status:
 - Work Package Material Status:
 - Material Status Last Updated:
- Section C:**
 - Site: 10201
 - Class: ACTIVITY
 - Status: COMP
 - Status Date: 6/12/12 6:30 AM
 - Approved Date: 5/30/12 12:12 PM
 - Inherit Status Changes?
 - Accepts Changes?
 - Is Task?
 - Under Flow Control?
 - Suspend Flow Control?
 - Flow Action:
 - Flow Action Assist?
 - Modified By: RID 1161
 - Modified Date: 10/17/13 6:01 PM
 - Entered By: MCRABITOS
 - Entered Date: 6/7/12 12:12 PM

Figure 5-17: Work Order Tab – Sections A, B and C

Section	Title	Description
A <i>Work Order</i>	*Work Order	Auto-populated from a previous screen - Ticket/Work Order Number that is auto-generated along with a user-written description in the field to the right.
	Record Type	Auto-populated from a previous screen - Organization Identifier of the originating Record/Service Request.
	Generated From	Auto-populated from a previous screen
	Location	Auto-populated from a previous screen - Identifies the primary location on the work order. Enter the identifier for the location or click the Detail Menu button to select an option and retrieve a value.
	Asset	Identifies the primary asset on the work order request. Enter the identifier for the asset or click the Detail Menu button to select an option and retrieve a value.
	Parent WO	Parent of the work order shown in the Work Order field. When this field is blank, the work order in the Work Order field is a top-level work order. To assign a work order to a parent, select Assign to New Parent from the Select Action menu.
	Classification	Class Type of the ticket/service request.
	Class Description	Description of the classification specified for this record.
	Launch Entry Name	Not currently used by NAVFAC, related to the ability for an external application to trigger an event.
	*Work Center	Person group of the service request. This group has overall responsibility for the service request. You can enter a value either in this field or the Person Group field. Use the Select Action menu to assign an owner group. Note: this action may not be available to all users.
	Failure Class	Failure class of the defined work asset. The failure class is the top level of the failure hierarchy.
	Problem Code	Auto-populated from a previous screen - Based on the Failure Class structure, identifies the Reason for Failure / Problem Code of the Failure Class.
	Project Number	Project Number associated to the Service Request (LOCAL USE).
	CLIN	Contract Line Item Number associated to the Service Request, if applicable.
	Type Service	Auto-populated from a previous screen
	SIC	The SIC code is defined as a sub-designator indicating the SIC for the identified special project requirement. A SIC shall be chosen from the drop-down list in Maximo and used in conjunction with the IPL Type, Funding Type, and Work Class codes.
	Command Sponsor	HQ/Command providing funding for the work.
Supported Command Program	Value list selection, of approved Programs. Managed by NAVFAC Operations. Normally established as part of Service Request.	
Reimbursable?	Is the work reimbursable to the PWD?	

Table 5-16: Field Descriptions on the Work Order Tab for Section A

Section	Title	Description
B <i>Work Order</i>	Work Type	Auto-generated from a previous screen - The Work Type applied to the Service Request (i.e. EMERGENCY, URGENT, etc.).
	Sub Work Type	Auto-generated from a previous screen - The Sub Work Type is derived from the Work Type.
	Master System	Identifies the UNIFORMAT Master System to the Service Request, if applicable.
	System	Identifies the UNIFORMAT System
	Sub-System	Identifies the UNIFORMAT Sub-System
	Business Line	Auto-generated from a previous screen - Business Line associated with Service Request.
	PS Code	Auto-generated from a previous screen - Product Service Code Deliverable associated to the Service Request that is derived from the Business Line.
	Category of Work	Auto-generated from a previous screen - NAVFAC Work Category associated to the Service Request derived from the Business Line / PS Deliverable fields.
	Component	Auto-generated from a previous screen - Component Command responsible for the Service Request.
	Expected Cost	The Expected Cost for the Service Request.
	Activity	An Activity is a Navy Installation within a Region in a Facilities Engineering Command's (FEC's) area of responsibility. This field auto-populates when a valid GL Account is applied to the Service Request.
	Funding Type	The Funds SIC of the Service Request.
	GL Account	IPL Priority Score associated the Service Request.
	IPL Type	Value list (but also editable). Integrated Priority List - used to organize/group requirements.
	IPL Priority	Used to refine & prioritize the request on the list.
	Work Class	The Work Class code is defined as a sub-designator indicating the work class for the identified requirement. A Work Class shall be chosen from the drop-down list in Maximo and used in conjunction with IPL Type and Funding Type.
	Program Year	Indicates the IPL Program Year of the Service Request, if applicable.
	Quarter	The IPL Quarter associated with the Service Request, if applicable.
	Storeroom Material Status	Auto-generated from a previous screen
	Direct Issue Material Status	Auto-generated from a previous screen
Work Package Material Status	Auto-generated from a previous screen	
Material Status Last Updated	Auto-generated from a previous screen	

Table 5-17: Field Descriptions on the Work Order Tab for Section B

Section	Title	Description
C Work Order	Site	Auto-generated from a previous screen - Unique identifier of the site. Enter a value or click the Select Value button.
	Class	Auto-generated from a previous screen - Condition Index Number.
	Status	Auto-generated from a previous screen - VALUEs, need to be defined and explained (system set but manually can be changed).
	Status Date	Auto-generated from a previous screen - The Status date/time field indicates when the status is created (defaults) when inserting a new Service Request or when the status changes on the Service Request.
	Approved Date	The Date on which the Work Order was last approved.
	Inherit Status Changes?	Inherit status from follow up record/service request.
	Accepts Charges?	Check box specifies whether or not the work order accepts charges. If the check box is selected (the default), the work order accepts charges. If the check box is cleared, the work order does not accept charges, and you cannot enter charges on the work order.
	Is Task?	Specifies whether the work order is a task. If the check box is selected, the work order is a task. If the check box is cleared, the work order is not a task.
	Under Flow Control?	Flag used to indicate a records participation in flow control. When applied to a parent, it rolls down the hierarchy to all its child records.
	Suspend Flow Control?	Flag used to suspend and resume flow control on a parent record. Rolls down the hierarchy to all its child records.
	Flow Action	The action to be performed (if any) when the work order is started via process flow control.
	Flow Action Assist?	Suppresses the automatic firing of the action in flow control.
	Modified By	Auto-generated from a previous screen - Person who modified or changed the Service Request.
	Modified Date	Auto-generated from a previous screen - Date on which Ticket/Service Request changed.
	Entered By	Auto-generated from a previous screen
Entered Date	Auto-generated from a previous screen - The actual date of when the Service Request was entered into the system.	

Table 5-18: Field Descriptions on the Work Order Tab for Section C

5.3.7 Relevant Corporate Guidance or Documentation in the Appendix

Documentation hosted on the NAVFAC Portal at: <https://hub.navyfac.navy.mil>

[B-5.2.14 Utility Outage Reporting and Data Collection](#)

[B-5.2.24 UEM Work Order Metrics](#)

[B-15.4 Efficiency and Effectiveness Metric E2M](#)

[B-15.17 Work Tracking](#)

[B-15.27 Facility Emergency, Urgent, and Routine Service Request and Work Order Process](#)

[B-15.37 Ownership of Metrics](#)

[B-15.39 Optimize PM Scheduling](#)

5.4 Assets Module

5.4.1 Module Overview

The Assets Module is used to track physical assets, define relationships between assets, and manage assets throughout their life cycles.

The Assets application is used to perform the following tasks:

- Search for asset records
- View, modify, add, or delete the main record for an asset
- Create the asset hierarchy and view the subassemblies and parts of an asset
- View, modify, add, or delete safety records for an asset
- View or add metering information for an asset
- Specify or view the specifications for an asset as recorded in the Classifications application

Additionally, the application is used to create and to store asset numbers and corresponding information, such as parent, location, vendor, status, and maintenance costs for each asset. The user can build the asset hierarchy as an arrangement of buildings, departments, assets, and subassemblies. The asset hierarchy provides a convenient way to roll up maintenance costs so that you can check accumulated costs at any level, at any time. This application can also find a particular asset quickly.

The Applications used by NAVFAC within the Asset Module are as follows:

Application	Description
Assets	Used to create and to store asset numbers and corresponding information, such as parent, location, vendor, status, and maintenance costs for each asset.
Asset Templates	Used to create multiple assets or to update multiple existing assets.
Locations	Used to track the movement of assets from place to place. A user can view all assets at a particular location with this application.
Assets (Tr)	This application contains information specific to each piece of equipment maintained in the equipment inventory. The application is designed to track vehicle equipment numbers and corresponding information such as location pools, vehicle details, life cycle, disposition, lease details, ownership, meter totals, maintenance costs and other applicable types of information required to effectively provide fleet management.
Asset Templates (Tr)	To create asset templates for users to apply identical information to multiple assets, use the Asset Templates (Tr) application.
Navy EC (Tr)	Used to track aircraft assets.

Table 5-19: Assets Applications

5.4.2 Module Application Tabs

Within each Application, there are several tabs that are required to be populated in order to submit as shown in Figure 5-18: Asset Application Tabs. Table 5-20: Asset Tab Descriptions describes the uses for the tabs within the Assets Application.

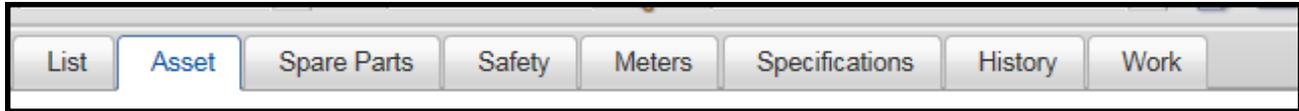


Figure 5-18: Asset Application Tabs

Tab	Description
Asset	Used to track physical assets, to define relationships between assets, and to manage assets throughout their life cycles.
Spare Parts	Used by some. Entering material/parts that frequently get replaced during PMs could be added so that the mechanic will know ahead of time what material/parts they will need. Will help SCM forecast material/parts needs in advance and have it staged and ready to be picked up.
Safety	Hazard and Precaution: Used by some. Pick lists are ready to go but FECs need to decide to start using the functionality. Would need guidance on purpose of tab. Hazardous Materials: Pick lists are ready to go but FECs need to decide to start using the functionality. Would need guidance on purpose of tab. Lock Out/Tag Out: Unused at this time. Pick list are not populated. Would need guidance on purpose of tab. Safety-Related Assets: Unused at this time. Would need guidance on purpose of tab.
Meters	Used by all for ICAP/UCAP for the DCR ratings
Specifications	Used by UEM, VTE, Backflow, and specialized inspections.
History	Auto-populated based on associated records throughout the system.
Work	Auto-populated based on associated Service Requests and Work Orders that are not in a historical status.

Table 5-20: Asset Tab Descriptions

5.4.3 Business Objective

The objective of the Assets Application is to identify dynamic and static equipment that NAVFAC is responsible for maintaining. In addition, the application seeks to identify and manage the condition rating of the asset.

5.4.4 Critical Success Factors

The factors that contribute to the success of the Assets Application include:

- Identifying all NAVFAC assets in the Maximo application
- Metering values to accurately represent current state of any asset
- Verifying that key data elements are correct (Replacement Cost, Installation Date, Inventory Category, Asset Type, UNIFORMAT)
- Ensuring key elements are properly entered and maintained. These key elements include: Inventory Category, Location, Asset Type, Master System, System, Subsystem, replacement cost, and meter group with appropriate direct condition rating (DCR).

5.4.5 Key Roles and Responsibility in the module

- Identifier: Creates the Asset in Maximo
- Reviewer: Updates the rating and validates key data elements

5.4.6 Process

The following section contains descriptions and screenshots of the Asset tab, which is the main source of information collection within the Assets Application. The screenshots and tables throughout include instructions and descriptions of required information to submit and save the tab. The required fields for Asset Submission are highlighted below:

The screenshot displays the 'Asset Tab' in Maximo. At the top, there's a navigation bar with 'Assets' and various utility icons. Below that, a search bar and a 'Select Action' dropdown are visible. The main form is divided into several sections:

- Asset Information:** Asset ID (025008), Description (ELEVATOR, ELECTRIC TRACTION, PASSENGER), Site (10201), Asset Type (FACILITIES), Status (OPERATING), and Comments.
- Details:**
 - Location (B):** Parent, Location (LAFRIV-100 >> ADMIN MAIN BLDG - A), Zone (NSA), Additional Loc Info (ELEVATOR C), Location POC, Technician, Bin, Rotating Item, Condition Code.
 - Calendar (C):** Calendar (GENERAL), Shift, Priority (5), Failure Class (CONVEYING), Inventory Category (BOTH), Item Type, Tool Rate, GL Account, Work Center (WAWP5C), Critical? checkbox.
- Meter Group:** D1010140 >> D1010140 - Traction Geared Elevators. Usage, Master System (D10 - CONVEYING), System (D1010 - ELEVATORS AND LIFTS), Sub-System (D1010140 - TRACTION GEARED ELEVATORS), Asset Quantity (1), UOM (EA), Special Requirement (3500 LB CAPACITY, 5 STOPS, 200 FPM).
- Purchase Information (D):** Vendor, Manufacturer (GENERAL ELEVATOR), Model, Serial (5617), Name Plate, Installation Date (2/1/88), Purchase Price (0.00), Warranty Expiration Date, PO.
- Costs (E):** Total Cost (0.00), YTD Cost (0.00), Budgeted Cost (0.00), Replacement Cost (115,003.00), Inventory (0.00).
- Downtime (F):** Asset Up? checkbox, Status Date, Total Downtime (0.00).
- Modified:** Reported By, Reported Date, Changed By (CARPERWE), Changed Date (3/8/15 10:10 AM).

Figure 5-19: Asset Tab

The minimum fields needed to create or save an Asset are located below. However, several additional fields should be completed:

To **SUBMIT** the Asset tab, complete the following fields:

- | | | |
|-------------------|-----------------------|-------------------|
| 1. Asset Type | 2. Inventory category | 3. Work Center |
| 4. Master System | 5. System | 6. Sub-system |
| 7. Asset Quantity | 8. Installation Date | 9. Purchase Price |
| 10. Budgeted Cost | 11. Replacement Cost | |

Additional Recommended fields include:

- | | | |
|---------------------|-------------------------|-----------------------------|
| 1. Manufacturer | 2. Serial number | 3. Model |
| 4. Vendor | 5. Special Requirements | 6. Warranty Expiration Date |
| 7. Long Description | 8. Critical? (checkbox) | |

For more detailed instruction on completing the Asset tab, follow the screenshots and steps that follow.

Detailed Descriptions of Asset Tab:

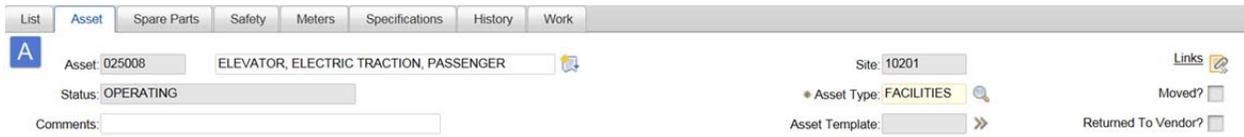


Figure 5-20: Asset Tab – Section A

Section	Title	Description
A Asset	Asset	System Generated Field
	Status	Value List - Status of the asset. Note: this action may not be available to all users. Default statuses are: Operating, Decommissioned, DEA (for Deactivated)
	Comments	More detail regarding the Asset, if needed.
	Site	Unique identifier of the site (FEC). Enter a value or click the Select Value button.
	*Asset Type	The predefined type of this asset. Currently only UTILITIES or FACILITIES are valid values.
	Asset Template	System Generated Field - Used to specify common asset information in an asset template that can be applied to multiple assets.

Table 5-21: Field Descriptions on the Asset Tab for Section A

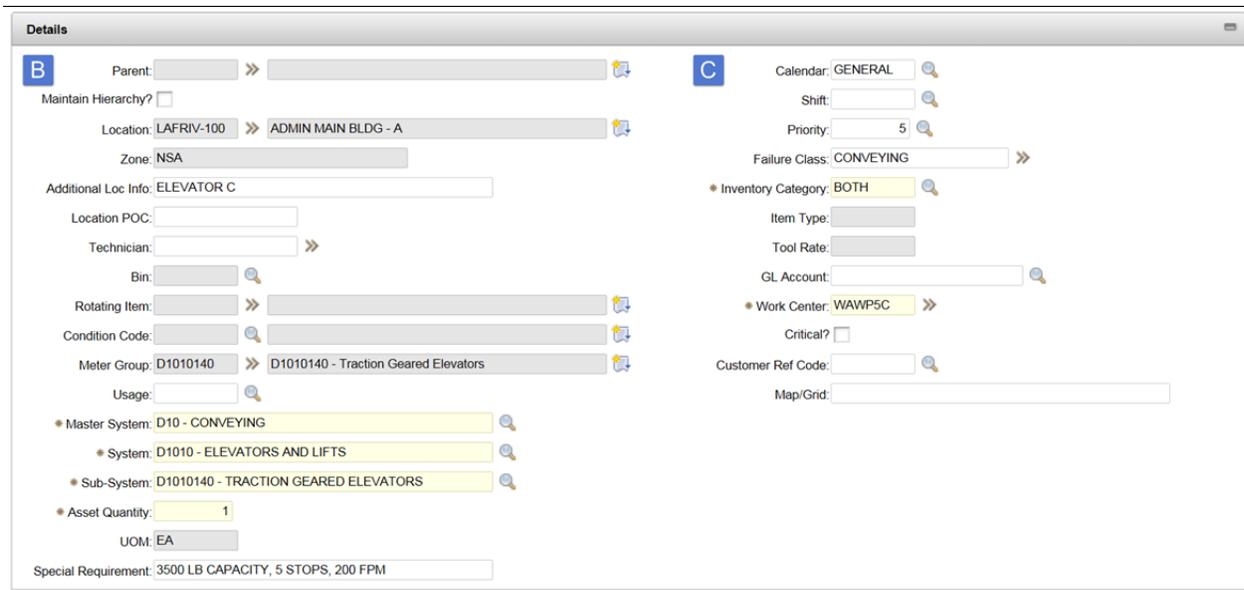


Figure 5-21: Asset Tab – Section B

Section	Title	Description
B <i>Details, Part 1</i>	Parent	Auto-populated from a previous screen
	Maintain Hierarchy?	Check Box
	Location	Auto-populated from a previous screen
	Zone	Auto-populated from a previous screen - Geographic Identifier populated based on the Location.
	Additional Loc Info	Additional Location Information associated to the Asset.
	Location POC	The Location POC derived from the Location field
	Technician	The responsible person assigned to manage/track the request.
	Bin	Auto-populated from a previous screen
	Rotating Item	Auto-populated from a previous screen
	Condition Code	Auto-populated from a previous screen
	Meter Group	Auto-populated from a previous screen - Used to define a logical grouping of meters that exists in a meter group. Meter groups represent a collection of meters that are used together multiple times.
	Usage	Value list, to allow assets to be groups by use or purpose. Unused at this time.
	*Master System	Identifies the UNIFORMAT Master System to the request, if applicable
	*System	Identifies the UNIFORMAT System, if applicable
	*Sub-System	Identifies the UNIFORMAT Sub-System, if applicable
	*Asset Quantity	Number of assets that are being addressed in this request
	UOM	Auto-populated from a previous screen
Special Requirement	Any special requirements for the equipment such as security clearance, special tools etc.	

Table 5-22: Field Descriptions on the Asset Tab for Section B

Figure 5-22: Asset Tab – Section C

Section	Title	Description
<p>C <i>Details, Part 2</i></p>	Calendar	Business days and times used to calculate the Target Contact, Target Response, and Target Resolution dates on a ticket or work order. Click the Detail Menu to select a calendar or go to the Calendars application to create one.
	Shift	Along with the calculation calendar, sets the business hours that calculate the Target Contact, Target Response, and Target Resolution dates on a ticket or work order. Click the Select Value button to choose a shift.
	Priority	Priority of the request as determined by the owner on a scale from 1-10.
	Failure Class	Used to build and display failure hierarchies, which help you construct accurate histories of the failures that affect your assets and operating locations.
	*Inventory Category	Asset Inventory Category used in Condition Based Management/Infrastructure Condition Assessment Program (ICAP). Valid Selection: BOTH - Both RPIE and CIMU CIMU - Component Inventory Management Unit RPIE - Real Property Installed Equipment
	Item Type	Auto-populated from a previous screen
	Tool Rate	Auto-populated from a previous screen
	GL Account	IPL Priority Score associated the Service Request.
	*Work Center	Person group of the service request. This group has overall responsibility for the service request. You can enter a value either in this field or the Person Group field. Use the Select Action menu to assign an owner group. Note: this action may not be available to all users.
	Critical?	Is equipment critical to mission of facility/installation? For information purposes only. It has no effect on CI or work order priority.
	Customer Ref Code	Organization/Department/Tenant command that benefits from work.
Map/Grid	Map Grid information to locate the asset record on local map	

Table 5-23: Field Descriptions on the Asset Tab for Section C

The screenshot displays the Asset Tab interface with four main sections:

- Purchase Information (Section D):** Includes fields for Vendor, Manufacturer (GENERAL ELEVATOR), Model, Serial (5617), Name Plate, Installation Date (2/1/88), Purchase Price (0.00), Warranty Expiration Date, and PO.
- Costs (Section E):** Displays Total Cost (0.00), YTD Cost (0.00), Budgeted Cost (0.00), Replacement Cost (115,003.00), and Inventory (0.00).
- Downtime (Section F):** Includes Asset Up? (checked), Status Date, and Total Downtime (0.00).
- Modified:** Shows Reported By, Reported Date, Changed By (CARPERWE), and Changed Date (3/6/15 10:10 AM).

Figure 5-23: Asset Tab – Section D, E and F

Section	Title	Description
D <i>Purchase Information</i>	Vendor	Identifies the vendor for the service, service group, or asset. Enter a value or click the Detail Menu button to select an option and retrieve a value.
	Manufacturer	Part Manufacturer
	Model	Model of the part
	Serial	Serial number of the part
	Name Plate	Any other nameplate data available for the asset.
	*Installation Date	Date the asset was installed.
	*Purchase Price	The amount the asset was purchase for.
	Warranty Expiration Date	End date of the asset's warranty, if applicable.
E <i>Costs</i>	PO	Auto-populated from a previous screen
	Total Cost	Auto-populated from a previous screen
	YTD Cost	Auto-populated from a previous screen
	*Budgeted Cost	Budgeted Cost Of Work For The Year
	*Replacement Cost	Replacement Cost of the asset. This should be the sum of all equipment replacement costs if the Inventory Category is CIMU. [This is the cost of replacement of similar equipment and not modernization]
	Inventory	Auto-populated from a previous screen
F <i>Downtime</i>	Asset Up?	Checkbox indicating if the asset is currently up or down
	Status Date	Auto-populated from a previous screen - Indicates when the status is created. This field defaults when inserting a new request or when the status changes on the request.
	Total Downtime	Auto-populated from a previous screen
	Reported By	Auto-populated from a previous screen
	Reported Date	Auto-populated from a previous screen
	Changed By	Auto-populated from a previous screen
	Changed By Date	Auto-populated from a previous screen

Table 5-24: Field Descriptions on the Asset Tab for Sections D, E and F

5.4.7 Relevant Corporate Guidance or Documentation in the Appendix

- EXWC guidance for Vertical Transportation Equipment (VTE) assets
- NITC's Maximo 7.1 Documents on Assets
- PDT supplemental course material (<https://hub.navfac.navy.mil/webcenter/portal/bd/page1881>)

Documentation hosted on the NAVFAC Portal at: <https://hub.navyfac.navy.mil>

B-15.1 Infrastructure Condition Assessment Program

[B-15.1.1 ICAP: Condition Data Maintenance](#)

[B-15.1.2 ICAP: Process for Analysis \(Generate Requirements\)](#)

[B-15.1.5 ICAP: Continuing Inspection and Assessment Process](#)

[B-15.1.8 Airfield Linear Segmentation](#)

[B-15.12 Vertical Transportation Equipment \(VTE\)](#)

[B-15.21 Trackage Audits](#)

[B-15.33 Electronic Operation and Maintenance Support Information \(e-OMSI\)](#)

5.5 Preventive Maintenance (PM) Module

5.5.1 Module Overview

Preventive Maintenance (PM) records are templates for scheduled preventive maintenance work. They are used to generate preventive maintenance work orders. PMs can contain job plan and corresponding safety plan information that is copied to work orders.

Information associated with a PM becomes part of the work order records the user generates from the PM. The user can create parent-child relationships between similar PMs to build a PM hierarchy, which generates hierarchies of related work orders. PM work can also be scheduled for assets on a route.

When PMs are created for assets or locations, the user determines how to schedule work. Schedules can be created based on the following conditions:

- Elapsed time since the target start date or completion date of previous work. PMs for this work are called time-based PMs.
- Metered asset usage since the target start date or completion date of previous work. PMs for this work are called meter-based PMs.
- A combination of elapsed time and metered usage. For example, you can schedule a PM to trigger work every six months or every 300 hours, whichever comes first.

The user can create flexible schedules by using lead times, seasonal, and extended dates. The user can also create flexible schedules by triggering work outside of a PM frequency cycle.

The user can group PMs into hierarchies that model your assets and create PMs for routes. PM data can be duplicated by generating PMs from a template PM called a Master PM.

The Applications used by NAVFAC within the Preventive Maintenance Module are as follows:

Application	Description
Preventive Maintenance	Used to plan periodic, preventive maintenance, and inspections for assets and locations.
Preventive Maintenance (Tr)	Preventive Maintenance as it is applied to Transportation
Master PM (Tr)	Used as a template to create preventive maintenance records. The user can create a schedule to generate work orders to ensure the required maintenance is done in a timely manner.

Table 5-25: Preventive Maintenance Applications

5.5.2 Module Application Tabs

Within each Application, there are several tabs that are required to be populated in order to approve as shown in Figure 5-24: Preventive Maintenance Application Tabs. Table 5-26: Preventive Maintenance Tab Descriptions describes the uses for the tabs within the Preventive Maintenance Application.



Figure 5-24: Preventive Maintenance Application Tabs

Tab	Description
List	Used to search Maximo for PM records.
PM	Used to enter, view, or modify Preventive Maintenance records and associate them with assets, locations, or GL Accounts.
Frequency	Used to enter, view, or modify scheduling criteria for the generation of work orders.
Seasonal Dates	Used to specify a PM's active months or seasons.
Job Plan Sequence	Used to add, view, modify, and sequence a progression of job plans for PM work.
PM Hierarchy	Used to enter, view, or modify PM hierarchies to generate scheduled work order hierarchies.
PM History	Used to view the status change history for PM work orders.
Forecast	Used to view an estimated future status for PM work orders

Table 5-26: Preventive Maintenance Tab Descriptions

5.5.3 Business Objective

Preventive Maintenance (PM) is a service provided by personnel who maintain the equipment and/or facility in an acceptable operating condition. PM is performed throughout the life of a piece of equipment or facility asset in order to prolong the life and performance of the asset. PM adheres to a routine schedule and is thus the opposite of unscheduled maintenance, which is provided after a failure or degradation in performance.

The goal of an effective and efficient PM program is to perform the optimum level of scheduled maintenance on equipment such that unscheduled maintenance is minimized and the life and performance of the asset is maximized. This will allow for the sustainment of equipment and facility assets and provide the lowest Total Ownership Cost, which supports the goal of long term operation.

5.5.4 Critical Success Factors

The factors that contribute to the success of the PM Application include:

- A clear definition of the work required
- Proper asset or location
- Optional routing,
- Scheduling
- Necessary funding information.

5.5.5 Key Roles and Responsibilities

- Identifier: Create the PM, Enter the Required Field, Attach Job Plans
- Customer Liaison: Package Estimates for Customer Review and Approval
- Scheduler: Schedule, Routing and Level Loading work to maximize production

5.5.6 Process

The following section contains descriptions and screenshots of the Preventive Maintenance tab, which is the main source of information collection within the Preventive Maintenance Application. The

screenshots and tables throughout include instructions and descriptions of required information to approve and save the tab. The required fields for PM Submission are highlighted below:

Figure 5-25: Planned Maintenance (PM) Tab

The minimum required fields to SAVE or APPROVE a PM are listed below. Many FECs have local instructions with procedures that require additional fields to be entered.

To **SAVE** and **APPROVE** the PM, complete the following fields:

- | | | |
|------------------|---------------------|---------------------|
| 1. Master System | 2. System | 3. Sub-System |
| 4. Business Line | 5. PS Code | 6. Category of Work |
| 7. Work type | 8. Sub work type | 9. Work Center |
| 10. Frequency | 11. Frequency Units | |

For more detailed instruction on completing the PM tab, follow the screenshots and steps that follow.

Detailed Descriptions of PM Tab Fields



Figure 5-26: PM Tab – Section C

Section	Title	Description
A PM	*PM	Auto-populated but can be overridden.
	Master PM	Identifies the master PM record associated with this PM.
	Site	Auto-populated from a previous screen.
	Override Updates from the Master PM?	Specifies whether changes to the Master PM will update this PM. If the checkbox is selected, changes to the Master PM will not affect this PM. If the checkbox is cleared, changes to the master PM will roll down to this PM whenever the Update Associated PMs action is performed.
	Forecast Dates Locked?	Auto-populated from a previous screen
	Status	Auto-populated from a previous screen
	Forecast Exists?	Auto-populated from a previous screen

Table 5-27: Field Descriptions on the PM Tab for Section A

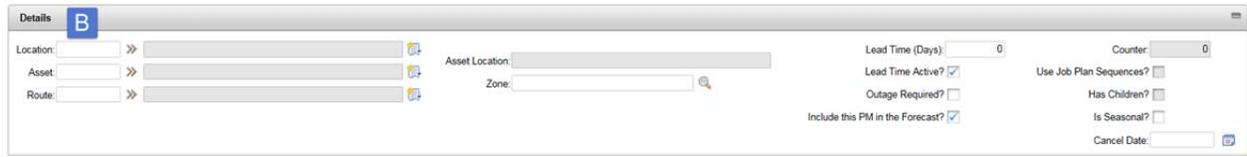


Figure 5-27: PM Tab – Section B

Section	Title	Description
B Details	Location	Location where work is done when work orders are generated from this PM.
	Asset	Asset on which the preventive maintenance is done. The Asset field is for the Maximo asset identifier, the value Maximo uses to track the asset.
	Route	Identifies the route associated with the PM. A route is a list of stops that represent asset or work locations. When you generate work orders from a PM with an associated route there are three options: Child Work Orders, Work Order Tasks or Multi-Asset Work Order. The method of the work orders and the amount of work orders generated depends on the above options.
	Asset Location	Auto-populated from a previous screen
	Zone	Local Geographic Area
	Lead Time (Days)	The number of days in advance of the Next Due Date that Maximo generates work orders from this PM. The target start date for the work order will still be the Next Due Date. You must Select the Lead Time Active checkbox before you can enter or edit data in this field.
	Lead Time Active?	Specifies whether you want to apply lead time when generating work orders from this PM. If the checkbox is selected (the default), Maximo generates work orders a number of days in advance of the Next Due Date. The number of days is defined in the Lead Time Days field. If the checkbox is cleared, no lead time is applied to the Next Due Date.
	Outage Required?	Checked if outage is required to perform work.
	Include this PM in the Forecast?	Indicates if this PM should be included in the forecast. Defaults to YES (Checked) but can be Unchecked to disable generation of a forecast for this PM.
	Counter	Auto-populated from a previous screen
	Use Job Plan Sequences?	Auto-populated from a previous screen
	Has Children?	If the check box is selected, the PM has child PMs associated with it. If the checkbox is cleared, the PM has no child PMs.
	Is Seasonal?	Determines if the PM is Seasonal.
	Cancel Date	PM Cancellation Date

Table 5-28: Field Descriptions on the PM Tab for Section B



Figure 5-28: PM Tab – Section C

Section	Title	Description
C Additional Information	*Master System	Identifies the UNIFORMAT Master System to the Service Request, if applicable.
	*System	Identifies the UNIFORMAT System, if applicable.
	*Sub-System	Identifies the UNIFORMAT Sub-System, if applicable.
	*Business Line	Business Line associated with Service Request.
	*Product & Services Code	PS / Product Service Code Deliverable associated to the Service Request that is derived from the Business Line.
	*Category of Work	NAVFAC Work Category associated to the Service Request derived from the Business Line / PS Deliverable fields.
	Asset Quantity	Identifies the number of asset items represented by the asset record. This will auto populate when using the asset related PM. Can be used to indicate the number of assets on the assigned Route but is not auto-populated.
	Overtime?	Check this box if overtime is required for the PM.
	Job Plan Duration	Auto-populated from a previous screen
	Additional Hours	The additional non- tool time to complete the work. Typical entries of additional time include the time required NOT included in the Job Plan such as travel, security, asset access etc. This time is then added to the estimated labor hours when a work order is generated from the PM. This field is used when assigning Multi-Asset Routes to compensate for different amount of Route Stops.
Completion Target	Represents the number of DAYS to complete the work order. This is Option 1 for calculating the Target Completion Date. This value is added to the Target Start date of the PM to calculate the Target Completion date of the work order generated from the PM.	
Customer Ref Code	The organization/department/tenant command that benefits from work.	

Table 5-29: Field Descriptions on the PM Tab for Section C

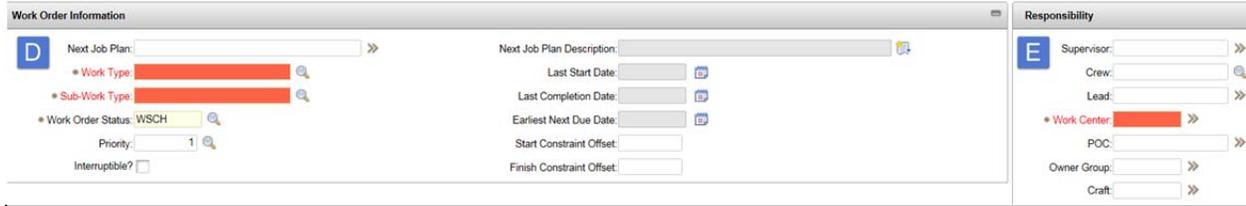


Figure 5-29: PM Tab – Section D and E

Section	Title	Description
D Work Order Information	Next Job Plan	Identifies the job plan associated with this PM.
	*Work Type	A value list. Classification or type of work order generated from this PM.
	*Sub Work Type	Sub category of Work Type. Value List. SHOP-OM is used if this PM is to be reported in COGNOS.
	*Work Order Status	Identifies the initial status of generated work orders.
	Priority	Priority of work orders generated from this PM.
	Interruptible?	Specifies if the work order created from this PM is allowed to be stopped and restarted during resource scheduling. If the checkbox is selected, the work order can be stopped and restarted. If the checkbox is cleared, the work order cannot be interrupted for resource scheduling.
	Next Job Plan Description	Auto-populated from a previous screen
	Last Start Date	Auto-populated from a previous screen
	Last Completion Date	Auto-populated from a previous screen
	Earliest Next Due Date	Auto-populated from a previous screen
	Start Constraint Offset	The amount of time (in hours) to be subtracted from the Target Start date in order to calculate the Start No Earlier Than date of the work record. Limits the number of days that can be changed to the start date when adjusting forecasted dates.
Finish Constraint Offset	The amount of time (in hours) to be added to the Target Finish date in order to calculate the Finish No Later Than date of the work record. Limits the number of days that can be changed to the completion date when adjusting forecasted dates.	
E Responsibility	Supervisor	Name of individual that is responsible for the work order.
	Crew	Work crew assigned to work orders generated from this PM. Maximo copies this field from either a single job plan on the PM or from the first job plan in a job plan sequence. If you change the job plan associated with the PM, you must update this field manually.
	Lead	The individual responsible for action on the service request.
	*Work Center	Identifies the Person Group for the supervisor.
	POC	The person who will be responsible for the work order generated from this PM.
	Owner Group	The person group who will be responsible for the work order generated from this PM.
	Craft	Maximo field - Craft Code.

Table 5-30: Field Descriptions on the PM Tab for Section D and E

Resource Information

F GL Account:

Storeroom:

Storeroom Site: 10601

CLIN:

Use this PM to Trigger PM Hierarchy?

Child Work Orders and Tasks Will Inherit Status Changes?

Modified By: MANNINGSN

Modified Date: 10/16/15 5:45 PM

Figure 5-30: PM Tab – Section F

Section	Title	Description
F <i>Resource Information</i>	GL Account	General ledger account to which costs on work orders generated from this PM are charged.
	Storeroom	The storeroom for materials on a PM with an associated job plan. If you leave this field blank, Maximo will populate this field with your default storeroom.
	Storeroom Site	Specifies the Storeroom's Site of an item.
	CLIN	If this PM is part of a base support contract, the Contract Line Item Number associated with this PM can be entered here as long as the value exists on the FEC list.
	Use this PM to Trigger PM Hierarchy?	Tells the Generate WO function that the frequency for a lower level PM should be checked when determining if all of the PMs in the hierarchy should be generated.
	Child Work Orders and Tasks Will Inherit Status Changes?	Specifies whether the child work order should change its status when the parents status changes. If the check box is selected, the status of the child work orders will change. If the check box is cleared, the status of the child work orders will not change.
	Modified By	Auto-populated from a previous screen
Modified Date	Auto-populated from a previous screen	

Table 5-31: Field Descriptions on the PM Tab for Section F

5.5.7 Relevant Corporate Guidance or Documentation in the Appendix

Documentation hosted on the NAVFAC Portal at: <https://hub.navyfac.navy.mil>

B-15.1 Infrastructure Condition Assessment Program

[B-15.1.5 ICAP: Continuing Inspection and Assessment Process](#)

[B-15.2 Preventive Maintenance](#)

[B-15.12 Vertical Transportation Equipment \(VTE\)](#)

[B-15.17 Work Tracking](#)

[B-15.33 Electronic Operation and Maintenance Support Information \(e-OMSI\)](#)

[B-15.39 Optimize PM Scheduling](#)

6 MAXIMO FOR TRANSPORTATION (Tr) MODULES & APPLICATIONS

The section will include the following modules with their associated applications:

Module	Module Description and Associated Applications
Administration Module	Service & Action Codes (Tr) application
Assets (Tr) Module	<p>The Assets module contains applications that are designed to manage the assets that are owned or leased by NAVFAC. Assets are managed from purchase to salvage, from the beginning to the end of the life cycle for an asset.</p> <p>Assets (Tr) application To add physical assets, define relationships between assets, and manage assets throughout their life cycles; you use the Assets (Tr) application. You can specify asset information such as parent, location, vendor, up or down status, and maintenance costs for each asset.</p> <p>Asset Templates (Tr) application To create asset templates so that you can apply identical information to multiple assets, use the Asset Templates (Tr) application.</p> <p>Inventory Objective (Tr) application</p> <p>Navy EC (Tr) application</p> <p>Fast Locations (Tr) application</p> <p>BSO UIC (Tr) application</p>
Data Import (Tr) Module	<p>Used to import externally generated data into Maximo for Transportation.</p> <p>Fuel Transactions Import (Tr) application To import transaction and meter-reading data from an external source, such as a fuel provider, you use the Fuel Transactions Import (Tr) application. You can then create records in the Maximo database from the imported records.</p> <p>Fuel Card (Tr) application To manage the fuel cards. Fuel card records must be created for each vehicle that will be issued fuel by means a commercial credit card, DESC chip key (Pro-key or Vil Key), inventory fuel system, or by manual transactions, e.g., coupons, stationary fuel tank (not equipped with an automated dispensing system), or mobile fuel truck.</p> <p>Fuel Product (Tr) application This application is used to establish unit costs for each relevant type of fuel (product code) as well as making the product codes available for selection as fuel types.</p>

Module	Module Description and Associated Applications
Motor Pool(Tr) Module	<p>Used to manage vehicle requests and dispatches and associated billing.</p> <p>Rate Schedules (Tr) application Used to apply rate schedules to motor-pool dispatches and long-term assignments. Rate schedules are used to generate charges for asset use.</p> <p>Vehicle Requests (Tr) application To enter a request for a vehicle to be dispatched to a user, use the Vehicle Requests (Tr) application. The details of existing dispatch requests can be viewed here.</p> <p>Vehicle Scheduling (Tr) application To request, assign and schedule vehicles and drivers to be dispatched to a user, use the Vehicle Scheduling (Tr) application. The user can also start and complete vehicle dispatches in the Vehicle Scheduling (Tr) application. The details of existing dispatch requests can be viewed here.</p>
Planning (Tr) Module	<p>Job Plans (Tr) application</p>
Preventative Maintenance (Tr) Module	<p>Preventative Maintenance (Tr) application</p> <p>Master PM (Tr) application</p>
Warranties (Tr) Module	<p>Used to manage item warranties, asset warranties, and warranty claims.</p> <p>Asset Warranty Contracts (Tr) application To create and view asset warranty contracts, use the Asset Warranty Contracts (Tr) application. An asset warranty contract defines the repairs to an asset that the warranty provider is responsible for performing or paying for. The warranty contract defines warranty durations for assets by time or meter.</p> <p>Item Warranty Contracts (Tr) application To create and view item warranty contracts, use the Item Warranty Contracts (Tr) application. An item warranty contract defines the warranty coverage for specific items or for a group of items.</p> <p>Warranty Claims (Tr) application To generate warranty claims based on warrantable transactions, such as labor use and material use, use the Warranty Claims (Tr) application. The user can also enter ad hoc warranty claims, which are not based on transactions in IBM Maximo Asset Management.</p>
Work Orders (Tr) Module	<p>You use the applications in the Work Orders module to track work that has been performed in the past and to plan future maintenance work.</p> <p>Work Order Tracking (Tr) application In the Work Order Tracking (Tr) application, you create and manage work orders for assets and locations. A work order specifies a particular task, and the labor, materials, services, and tools that are required to complete the task.</p>

Table 6-1: Maximo (Tr)

6.1 IO Module (Tr)

6.1.1 Maximo (Tr) Inventory Objective Module

Maximo is the single source facilities management application used by Naval Facilities Engineering Command (NAVFAC). Maximo (Tr) was developed as a transportation management application and consists of an Asset Module and an Inventory Objective (IO) Module. The IO Module provides the ability to capture, track, modify and report on customers' mission requirements for which vehicle support is needed, as well as the ability to link BSVE assets to the missions they support.

6.1.2 IO Module Overview

The IO Module is broken into five sections that are described in detail below. The module captures key information about the customer, the customer's mission, specific characteristics of the asset needed to support the mission, as well as the various NAVFAC organizational elements supporting the customer's mission. The IO Module also tracks key information needed to document and track changes made within the module. All fields within the IO Module are mandatory and must be accurately populated. While the IO Module allows users to leave fields blank, fields not completed or completed incorrectly will reflect on data integrity reports.

The following illustrations are screenshots from the Maximo (Tr) IO Module. Descriptions and definitions are provided to clarify information required to correctly complete the individual IO Module fields. NOTE: Shaded fields within the IO Module are auto-populated based on entries to required fields.

The IO Module is comprised of the following five sections: (A) Customer Information, (B) PWD/FEC Core Information, (C) PLMO Information, (D) TRIO Information, and (E) Modification Information. Immediately below is a full screen view of the IO Module reflecting all five sections.

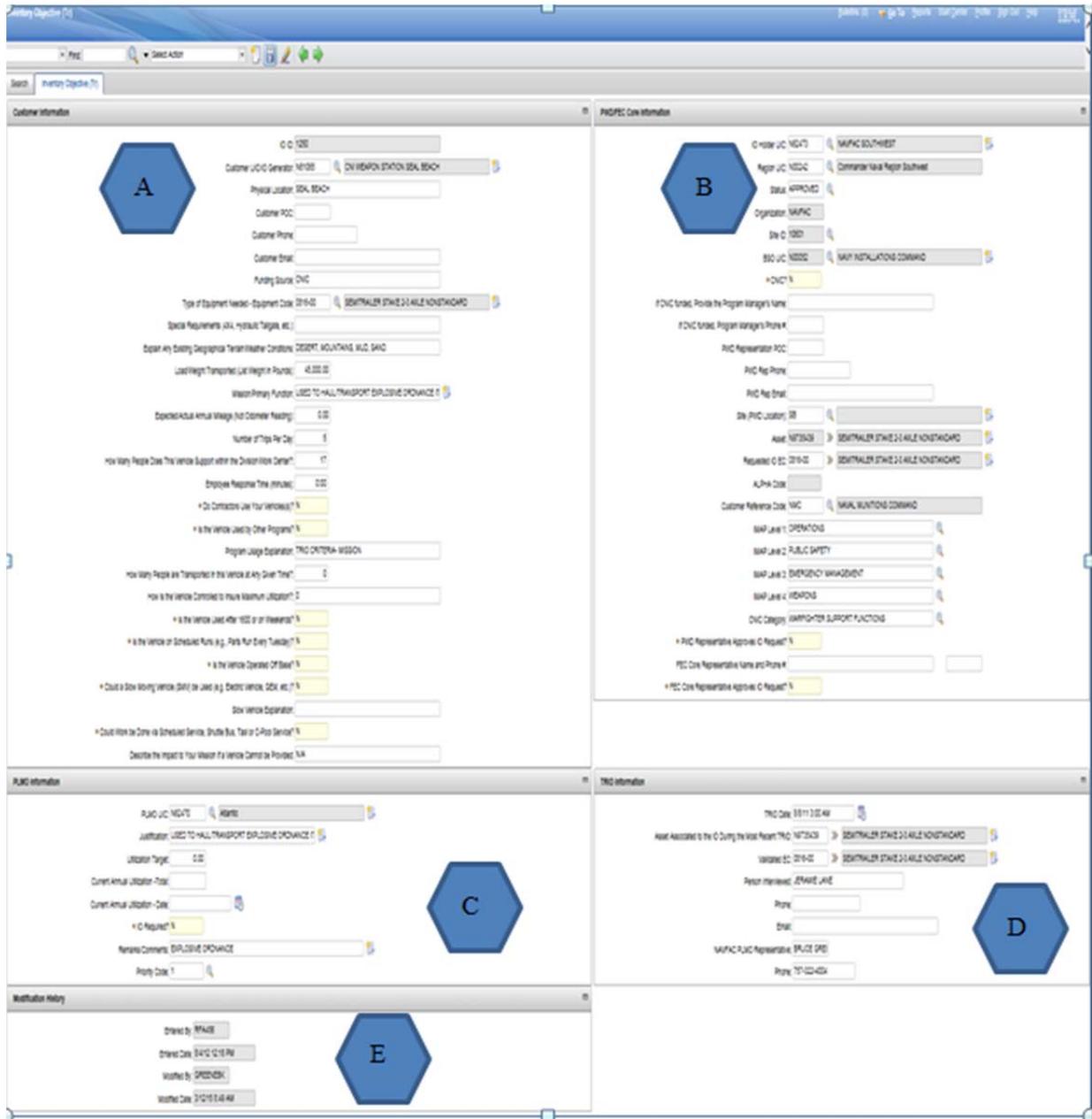


Figure 6-1: Maximo (Tr) IO Module – Full Screen View

The screenshot shows the 'Customer Information' form in Maximo. The form includes the following fields and values:

- IO ID: 1005
- Customer UIC/IO Generator: V32778 (FLEET ACTIVITIES CHINHAE)
- Physical Location: SEOUL
- Customer POC: [Empty]
- Customer Phone: [Empty]
- Customer Email: [Empty]
- Funding Source: [Empty]
- Type of Equipment Needed - Equipment Code: 0330-03 (TRUCK VAN FORWARD CONTROL 12 PASSENGER 4X2 8501)
- Special Requirements (4X4, Hydraulic Tailgate, etc.): 2 PAX
- Explain Any Existing Geographical Terrain/Weather Conditions: [Empty]
- Load/Weight Transported (List Weight in Pounds): [Empty]
- Mission/Primary Function: [Empty] (Annotated with 'Use Long Description')
- Expected/Actual Annual Mileage (Not Odometer Reading): [Empty]
- Number of Trips Per Day: 5
- How Many People Does This Vehicle Support within the Division/Work Center?: [Empty]
- Employee Response Time (minutes): 0:00
- * Do Contractors Use Your Vehicles(s)? N
- * Is the Vehicle Used by Other Programs? N
- Program Usage Explanation: [Empty]
- How Many People are Transported in this Vehicle at Any Given Time?: [Empty]
- How is the Vehicle Controlled to Insure Maximum Utilization?: 0
- * Is the Vehicle Used After 1600 or on Weekends? N
- * Is the Vehicle on Scheduled Runs (e.g., Parts Run Every Tuesday)? N
- * Is the Vehicle Operated Off Base? N
- * Could a Slow Moving Vehicle (SMV) be Used (e.g. Electric Vehicle, GEM, etc.)? N
- Slow Vehicle Explanation: [Empty]
- * Could Work be Done via Scheduled Service, Shuttle Bus, Taxi or C-Pool Service? N
- Describe the Impact to Your Mission if a Vehicle Cannot be Provided: [Empty]

Figure 6-2: Maximo (Tr) IO Module – Customer Information 1

Section	Title	Description
A Customer Information	IO ID	System Generated Field
	Customer UIC/IO Generator	Select the correct IO Generator or Customer UIC applicable to IO (this is to identify the customer who has the requirement)
	Customer UIC/IO Generator Description	Auto-populated based on Customer UIC/IO Generator
	Physical Location	Enter Physical Location of Vehicle (where asset is garaged)

Section	Title	Description
	Customer POC	Enter Customer Name of the POC representing the customer
	Customer Phone	Enter Customer Phone Number (include area code)
	Customer Email	Enter Customer POC Email
	Funding Source	Enter Source of Funding for IO/Requirement (what BSO is paying the bill)
	Type of Equipment Needed – Equipment Code	Select the EC recommended to fill IO(BSVE Manager to determine the EC)
	Description	Auto-populated based on Type of Equipment Needed – Equipment Code
	Special Requirements	Enter Special Requirements such as (4X4, Hydraulic Tailgate, etc.) needed for asset
	Explain any Existing Geographical Terrain/Weather Conditions	Enter Geographical Terrain or Weather Conditions based on Operating Environment
	Load/Weight Transported	Enter estimated load weight (lbs.) to be transported (if applicable).
	Mission/Primary Function	Describe Primary Mission to be supported by IO
	Expected/Actual Annual Mileage	Enter the Expected/Actual Annual Mileage for asset (Not Odometer Reading)
	Number of Trips Per Day	Enter Expected/Actual Number Trips per Day for asset
	How Many People Does This Vehicle Support within the Division/Work Center	Enter Number of People that are supported by this Asset
	Employee Response Time (minutes)	Enter Required Response Time (if applicable)
	Do Contractors Use Your Vehicle	Defaults to “N” for No. Change to “Y” for Yes if contractors operate asset that will fill this IO
	Is the Vehicle Used by Other Programs	Defaults to “N” for No. Change to “Y” for Yes if the vehicle/equipment is/will be used by Other Programs
	Program Usage Explanation	Enter explanation of why other programs use the vehicle/equipment
	How many People are Transported in this Vehicle at Any Given Time	Enter number of people normally transported in vehicle
	How is the Vehicle Controlled to Ensure Maximum Utilization	Describe Procedures for Maximizing Utilization
	Is the Vehicle Used After 1600 or on Weekends	Defaults to “N” for No. Change to “Y” for Yes if vehicle/equipment is used after 1600 or on weekends.
	Is the Vehicle on Scheduled Runs	Defaults to “N” for No. Change to “Y” for Yes if vehicle/equipment does have scheduled runs (e.g., Parts Run Every Tuesday)
	Is the Vehicle Operated Off Base	Defaults to “N” for No. Change to “Y” for Yes if vehicle/equipment is operated off base.
	Could a Slow Moving Vehicle (SMV) be Used (e.g. Electric Vehicle, GEM, etc.)	Defaults to “N” for No. Change to “Y” for Yes if a SMV could fill IO.
	Slow Vehicle Explanation	Enter explanation as appropriate

Section	Title	Description
	Could Work be Done via Scheduled Service, Shuttle Bus, Taxi, or C-Pool Service	Defaults to “N” for No. Change to “Y” for Yes if work could be done via scheduled service, shuttle, bus, taxi, or C-Pool.
	Describe the Impact to Your Mission if a Vehicle Cannot be Provided	Enter the impact to the mission if a vehicle/asset isn’t provided

Table 6-2: IO Module Field Descriptions - Customer Information

Figure 6-3: IO Module – PWD/FEC Core

Section	Title	Description
B PWD/FEC Core Information	IO Holder UIC	Enter the IO Holder’s UIC (this will identify the FEC or other authorized fleet owner who will be accountable for the IO)
	IO Holder UIC Description	Auto-populated based on IO Holder UIC

Section	Title	Description
	Region UIC	Enter the Region's UIC
	Region UIC Description	Auto-populated based on Region UIC
	Status	Select status using the look-up option. NOTE: Only NAVFAC LANT/PAC can <i>Approve</i> an IO – DO NOT select <i>Approve</i> .
	Organization	Defaults to "NAVFAC"
	Site ID	Defaults to Site ID based on user's Maximo Tr profile
	BSO UIC	Auto-populated based on Customer UIC/IO Generator input
	BSO UIC Description	Auto-populated based on BSO UIC
	CNIC	Defaults to "N" for <i>No</i> . Change to "Y" for <i>Yes</i> if requesting a CNIC-funded IO.
	If CNIC funded, Provide the Program Manager's Name	Enter CNIC Program Manager's Name (if applicable)
	If CNIC funded, Program Manager's Phone #	Enter CNIC Program Manager's Phone Number (incl. area code)
	PWD Representation POC	Enter PWD POC Name
	PWD Rep Phone	Enter PWD POC Phone Number
	PWD Rep Email	Enter PWD POC Email Address
	Site (PWD Location)	Enter Site (PWD Location)
	Site (PWD Location) Description	Auto-populated based on Site (PWD Location)
	Asset	Auto-populated when IO ID is linked in the Assets (Tr) Module
	Asset Description	Auto-populated based on Asset entry as described above
	Requested IO EC	Enter EC recommended to fill requested IO
	Requested IO EC Description	Auto-populated based on Requested IO EC
	ALPHA Code	Auto-populated based on Requested IO EC
	Customer Reference Code	Select accurate Customer Reference Code (CRC) associated to IO
	Customer Reference Code Description	Auto-populated based on Customer Reference Code
	IMAP Level 1	Only applicable to CNIC IOs. Select "NON CNIC" if appropriate. Using the most recent CNIC IMAP Model, select the appropriate IMAP Level 1 value based the requiring activity's organizational alignment. Do not base IMAP values on the functional support being provided by use of the asset.
	IMAP Level 2	Select IMAP Level 2 using most recent CNIC IMAP Model
	IMAP Level 3	Select IMAP Level 3 using most recent CNIC IMAP Model
	IMAP Level 4	Select IMAP Level 4 using most recent CNIC IMAP Model
	CNIC Category	Based on IMAP Level 4, select CNIC Category using most recent Category Reference (found in CNIC CONOPS)
	PWD Representative Approves IO Request	Defaults to "N" for <i>No</i> . Change to "Y" for <i>Yes</i> if PWD POC recommends approval IO request.

Section	Title	Description
	FEC Core Representative Name and Phone #	Enter FEC Core POC Name and Phone Number
	FEC Core Representative Approves IO Request	Defaults to “N” for <i>No</i> . Change to “Y” for <i>Yes</i> if FEC Core POC recommends approval of IO request.

Table 6-3: IO Module Field Descriptions - Customer Information

The screenshot shows a web form titled "PLMO Information". On the left is a blue hexagonal icon with the letter "C". The form contains the following fields:

- PLMO UIC: N62742 (with a search icon)
- Pacific (with a search icon)
- Justification: CNFK N-6 IT - SEOUL (with a search icon)
- Utilization Target: 2,000.00
- Current Annual Utilization - Total: (empty)
- Current Annual Utilization - Date: (empty, with a calendar icon)
- * IO Required? Y (highlighted in yellow)
- Remarks/Comments: PER CUSTOMER (with a search icon)
- Priority Code: (empty, with a search icon)

Figure 6-4: IO Module – PLMO Information

Section	Title	Description
C <i>PLMO Information</i>	PLMO UIC	Enter UIC for NAVFAC LANT/PAC (as applicable) to indicate ECH III organization that will manage IO
	PLMO UIC Description	Auto-populated from PLMO UIC entry
	Justification	Enter reason for justification (notes)
	Utilization Target	Enter the target/estimated utilization (miles, hours, trips, days) as applicable
	Current Annual Utilization Total	Enter the actual annual utilization (miles, hours, trips, days) for asset filling the requirement. Estimate if no asset is assigned or this is a new requirement.
	Current Annual Utilization Date	Enter date of submission of annual utilization total
	IO Required	Defaults to “N” for <i>No</i> . Change to “Y” for <i>Yes</i> .
	Remarks/Comments	Enter additional information as deemed necessary
	Priority Code	Enter CNIC Priority Code. Enter “0” for non-CNIC IOs. (Priority Code is no longer required no value added.)

Table 6-4: IO Module Field Description – PLMO Information

TRIO Information

TRIO Date: 11/2/14 5:00 PM

Asset Associated to the IO During the Most Recent TRIO: N9337568 >> TRUCK VAN FORWARD CONTROL 12 PASSENGER 4X2 8501

Validated EC: 0329-01 >> TRUCK PANEL FORWARD CONTROL 4X2 6001-8500 GVWR

Person Interviewed: YONG.HO KIM

Phone: 315-724-4422

Email: YONG.HO.KIM.KS@FE.NAVY.ML

NAVFAC PLMO Representative: TODD WALER

Phone: 808-473-3796

Figure 6-5: IO Module – TRIO Information

Section	Title	Description
D TRIO Information	TRIO Date	Enter date of most recent TRIO
	Asset Associated to the IO During the Most Recent TRIO	Enter Asset number associated to IO during the most recent TRIO
	Asset Associated to the IO During the Most Recent TRIO's	Auto-populated EC description based on the Assets EC from Asset number associated to IO during the most recent TRIO
	Validated EC	Enter most updated validated EC
	Validated EC	Auto-populated EC description based on validated EC
	Person Interviewed	Enter name of person interviewed at time of TRIO
	Phone	Enter phone number of person interviewed at TRIO
	Email	Enter email address of person interviewed at TRIO
	NAVFAC PLMO Representative	Enter name of PLMO Activity Representative
	Phone	Enter phone number of PLMO Activity Representative (include area code)

Table 6-5: IO Module Field Descriptions – TRIO Information

Modification History

Entered By: RFA456

Entered Date: 8/4/12 11:18 AM

Modified By: SD12763

Modified Date: 4/7/15 9:24 PM

Figure 6-6: IO Module – Modification History

Section	Title	Description
E <i>Modification History</i>	Entered By	Displays Login Name of Maximo User who created the IO Record
	Entered Date	Displays Date the IO Record was Created
	Modified By	Displays Login Name for Maximo User who made most recent changes to the IO Record
	Modified Date	Displays Date of most recent update to the IO Record

Table 6-6: IO Module Field Descriptions –Modification History

Corporate CRC

- To add a new Corporate CRC, contact the FEC Fleet Manager for approval. Once approved by the FEC Fleet Manager, submit an STS ticket.
- To activate current Corporate CRC for your FEC, submit an STS ticket.
- Annex F002 of Maximo User Guide (on the MUG Portal Page) has a recent version of the CRC in Word, Excel and PDF format

IOID Linking Procedures

Procedures to link BSVE assets to the IOs they fill/support are defined below. The PWD Transportation Site Manager or their designee is responsible to maintain current and accurate linking of assets/inventory to their supported IOs in accordance with this process.

Processing New IO Requests

- Customer Responsibilities:
 - Complete a hard copy IO Request Form and submit to the PWD.
 - Provide sufficient justification/documentation to support requirement. If/when applicable, include pertinent governing instructions, notices, publications and regulations that reference/support the requirement.
- PWD Responsibilities:
 - Validate that an Unfilled IO doesn't already exist for the specific customer and mission being represented in the IO Request. Use Long Description Field
 - Review IO Request Form for accuracy and completeness. Contact customer to gather additional information if needed. Ensure customer has explored all options for using existing assets to meet mission requirements prior to requesting additional IOs.
 - Create new IO Record in the Maximo IO Module.
 - Complete all fields in the Customer Information section of the IO Module.
 - Complete PWD-applicable fields in the PWD/FEC Core Information section of the IO Module.
 - Ensure the **Status** field reflects *Not Ready*.
 - Forward the IOID number to the FEC Fleet Manager or their designee.
- FEC Responsibilities:
 - Conduct detailed review of information entered into IO Module by PWD. Contact PWD to gather additional information (if required) to ensure solid justification for all IOs.
 - FEC Core to ensure data integrity of IO is maintained and valid
 - Verify recommended EC represents most efficient size/type asset to meet the mission requirement.

- Change the Status field to reflect the FEC's recommendation for the IO Request. If Disapproved, contact the PWD to inform of the decision. If the FEC recommends approval, change the Status field to Accepted.
- Transportation manager or their designee for review and approval of request, upon validating all information complete their approval section and change the status to accepted and forward to the appropriate PLMO office for approval.
- PLMO Responsibilities:
 - Validate all information in the IO Module has been completed and supports the documented mission requirement. Approve/Disapprove IO Request and inform FEC of decision. Validate IOs at the EC level.

Actively Maintaining IOs

The process for making changes to a customer's existing IOs is largely the same as the process described above for documenting/establishing new IOs. However, when the PWD only needs to change an EC assigned to an existing IO to meet a customer's requirement, the PWD will simply update the existing IO Record providing justification for the changes in the **Mission/Primary Function** field in the Customer Information section of the IO Module. All other steps described above remain applicable.

Assigning or Reassigning Asset with or without IOID Numbers

If an asset has an IOID number populated in the asset record and it is reassigned or excessed, the IOID number will be removed from the asset record. The bullets below briefly describe the process associated with the FEC or PWD managing IOID numbers.

Managing current and new trip tickets associated with that vehicle assignment.

- FEC Core/PWD will take action to:
 - Contact the customer to return the vehicle.
 - Customer returns the vehicle.
- Complete the trip ticket (status COMP) when the vehicle was returned.
- Remove the IOID number in the asset record.
 - Develop a process or report to track all open IO ID numbers and CRCs.
- Identify the asset number that will support that IO requirement.
 - To reassign an IOID to an asset record it is imperative that the IO supports the asset being reassigned.
- Enter the IOID number in the IOID field of that asset record.
- Enter the applicable customer reference code in the asset record.
- Create a trip ticket for the vehicle/asset.
 - Enter the appropriate GL Account
 - Enter the appropriate Rental Type
 - Enter status code WAPPR
- Notify the customer to pick up the vehicle.
- Issue the vehicle to the customer.
- Change the status of the trip ticket to INPRG.
- End of process.

The process below relates to assigning a newly received vehicle to a customer:

- Enter the IOID number in the IOID field of that asset record.
 - The IOID number **must** be applicable to the IO that the vehicle supports.
 - If the IO supports a new requirement, this will be the first time that the IOID number is linked to an asset record.
 - If a vehicle has been removed from the active inventory (customer returned the vehicle to the FEC Core/PWD for disposition action), the FEC Core/PWD **must** ensure that the IOID number from that vehicle is correctly associated with the new vehicle.
- Enter the new customer reference code in the asset record.
- Create a trip ticket for the vehicle/asset.
 - Enter the appropriate GL Account
 - Enter the appropriate Rental Type
 - Enter status code WAPPR
- Notify the customer to pick up the vehicle.
- Issue the vehicle to the customer.
- Change the status of the trip ticket to INPRG.
- End of process.

6.2 Budget Submitting Office (BSO) (Tr)

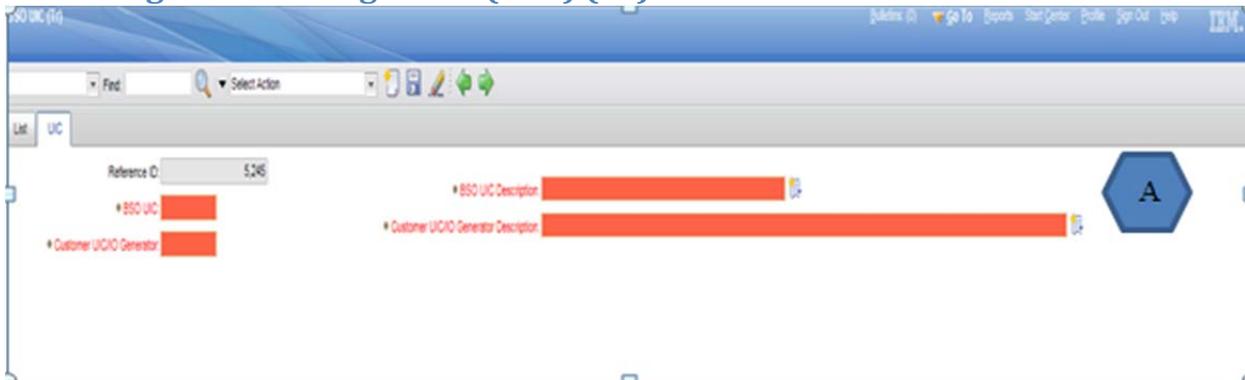


Figure 6-7: Budget Submitting Office (BSO)UIC (Tr)

Section	Title	Description
A <i>BSO UIC</i>	Reference ID	Auto Generated by Maximo
	BSO UIC	Enter Customer's Budget Submitting Office
	BSO UIC Description	Enter Customer's Budget Submitting Office Description Name
	Customer UIC IO Generator	Enter Customer's Unit Identification Code
	Customer UIC IO Generator Description	Enter Customer's Unit Identification Code Description Name

Table 6-7: Budget Submitting Office (BSO) UIC) (Tr) Field Descriptions

Procedures to activate a BSO for your site

- Contact your FEC BSVE Manager with the UIC, BSO and customer information
- <https://fmbweb1.nmci.navy.mil/uic/>

6.3 Navy EC (Tr)

The Navy EC (Tr) Application identifies EC specific data. This application varies significantly to that of the MAXIMO EC application that has both EC and EC Rate data. This application only contains EC and Default GL Account data. The Rate Schedules (Tr) Application contains data relative to EC rates.

This Navy EC (Tr) Application is managed by NAVFAC HQ and PLMO offices all others users will only have read access.

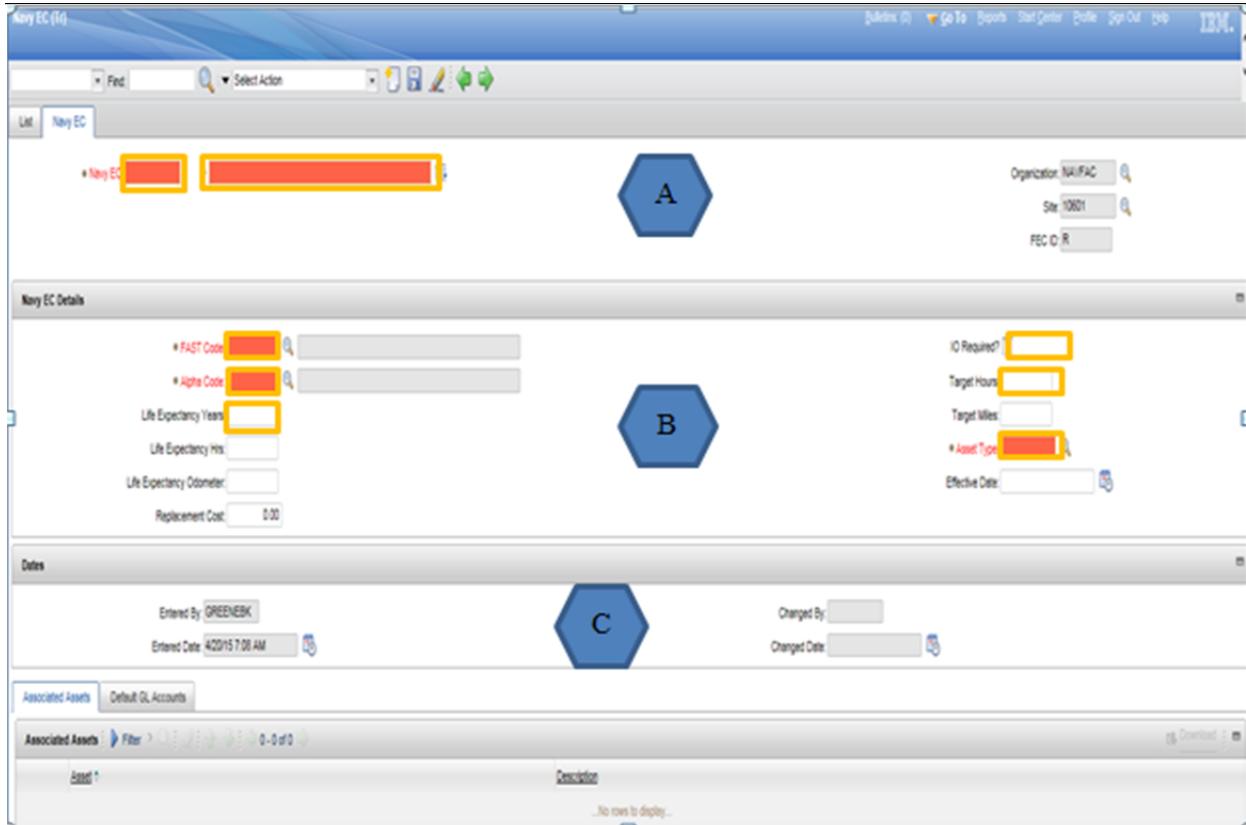


Figure 6-8: Navy EC (Tr)

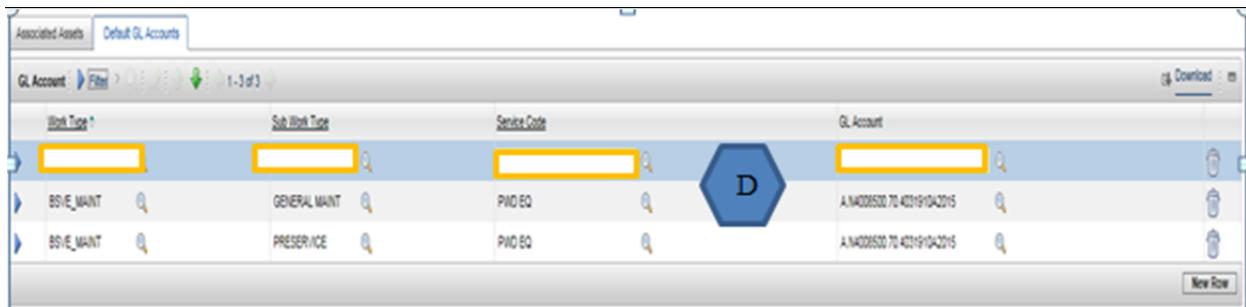


Figure 6-9: Navy EC (TR): Default GL Accounts Tab

6.3.1 Critical Success Factors

Critical success factors are defined as (1) required to save a record and (2) important in terms of associating data to equipment records that is essential to report fleet management data and produce metrics. Make every effort to completely populate all applicable fields.

Section	Title	Description
A <i>Navy EC</i>	Navy EC	Enter Corporate Navy Equipment Code
	Navy EC Description	Auto Populated with Description Of The Equipment Based On EC Table
	Organization	Auto Populated By Maximo
	Site	Auto Populated By Maximo
	FEC ID	Auto Populated By Maximo
B <i>Navy EC Details</i>	Fast Code	Select Fast Code From Drop Down Box (knowledgeable personnel should identify the correct code to be populated in this field)
	Alpha Code	Select Alpha Code From Drop Down Box applies to all Corporate ECs (Refer To Corporate EC Document To Validate Alpha Code)
	Life Expectancy Year	Enter Life Expectancy Year Based on Corporate Navy EC Table (estimated life expectancy for non-centralized ECs)
	Life Expectancy Hours	Enter Life Expectancy Hours Based on Corporate Navy EC Table (estimated life expectancy hours for non-centralized ECs)
	Life Expectancy Odometer	Enter Life Expectancy Odometer Based on Corporate Navy EC Table (estimated life expectancy mile for non-centralized ECs)
	Replacement Cost	Enter Replacement cost of the asset
	IO Required	Check the box for all ECs that are centrally managed and are defined as “IO Supported” based on NAVFAC HQ guidance. (for non-centralized EC Leave Blank)
	Target Hours	Enter Estimated Target Hours (should reflect estimated utilization based on FEC input)
	Target Miles	Enter Estimated Target Miles (should reflect estimated utilization based on FEC input)
	Asset Type	Select Asset Type From Drop Down Box
	Effective Date	Enter Date That The Record Was Entered
C <i>Dates</i>	Entered By	Auto Populated Based On Last User To Update Record
	Entered Date	Auto Populated Based On Last User To Update Record
	Changed By	Auto Populated Based On Last User To Update Record
	Changed Date	Auto Populated Based On Last User To Update Record
D <i>Default GL Accounts</i>	Work Type	Use Select Work Type from Use Drop Down To Choose Work Types
	Sub Work Type	Use Select Work Type from Use Drop Down To Choose Sub Work Types
	Service Code	Select Service Code from Drop Down To Choose Service Code
	GL Account	Assign a Default GL Account Number (The GL Account should be added for the 4-million types of maintenance. The GL Account will default to a maintenance work order based on the Work Type, Sub Type, and Service Code selected.)

Table 6-8: Navy EC (Tr) Field Descriptions

Policy: All assets inventoried in Maximo will be assigned a corporate EC or an approved FEC ECs for non-CESE assets.

Submit an STS ticket to activate an EC for your FEC

The EC application also serves as a means to group vehicles and equipment based on their designed configuration according to the most current corporate EC table.

Customer-owned equipment will be assigned a corporate EC based on the vehicle's configuration. For example, if the vehicle is customer-owned and a compact pickup, the EC is 0319. Regarding customer-owned equipment assigned an EC that is associated rental rates, the short-term and long-term fields will not be checked and the Owned? box **WILL NOT** be checked on the asset record. By not checking these fields, a trip cannot be created. This will preclude the possibility of creating trip tickets that would create billing lines, i.e., billing lines should not be created for customer-owned vehicles.

Identifying the need for non-CESE ECs is the responsibility of the FEC Core. When a PWD receives equipment and there is no existing EC based on the new equipment's configuration, the PWD will contact the FEC Core and provide vehicle configuration data, e.g., log splitter, cigarette boat, etc. The FEC Core will forward that information to the PLMO who will approve/disapprove the EC. If approved, PLMO personnel will create the EC record.

6.4 Assets (Tr) Module

6.4.1 Module Overview

This application contains information specific to each piece of equipment maintained in the equipment inventory. The application is designed to track vehicle equipment numbers and corresponding information such as location pools, vehicle details, life cycle, disposition, lease details, ownership, meter totals, maintenance costs and other applicable types of information required to effectively provide fleet management.

This Assets (Tr) section and the following sections are segregated by process groupings intended to document principal CESE fleet management data.

6.4.2 Critical Success Factors

Critical success factors are defined as (1) required to save a record and (2) important in terms of associating data to equipment records that is essential to report fleet management data and produce metrics. All fields lend value to data management. However, all available fields are not addressed in this section and the next section Non-Critical success factors. Every effort should be directed to populate all applicable fields.

6.4.3 Module Application Tabs

6.4.3.1 Asset Tab

The Asset tab in this module is required to be completed when creating an asset record. The detailed field descriptions are contained in the following figures:

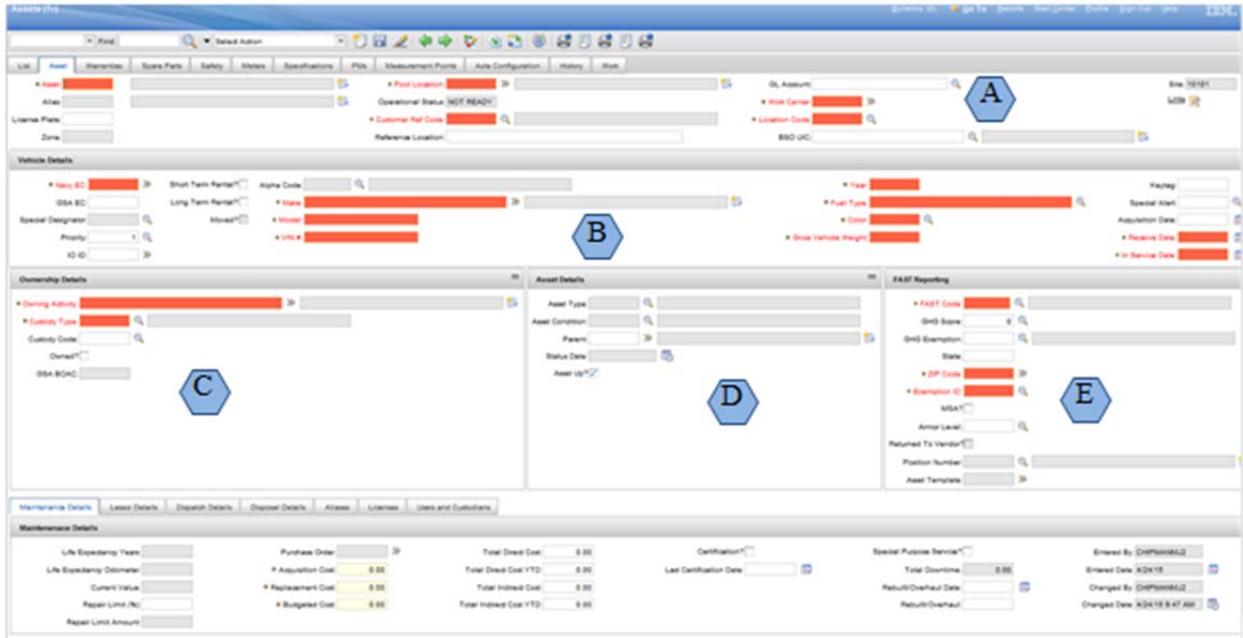


Figure 6-10: Assets (Tr) Module Main Tab

Section	Title	Description
A <i>Assets (Tr) Tab Information</i>	*Asset	Required to save a record. GSA vehicles numbers must begin with the letter "G" and Navy Owned CESE numbers must begin with the letter "N". Navy procured customer owned CESE must begin with the letter "N" or the equipment number if non-CESE equipment
	Alias	Displays previously assigned tag numbers if populated and the appropriate box is checked in the Aliases Sub Tab
	License Plate	Enter asset tag number attached to the asset. If state or foreign plate, enter the number in this field
	Zone	Auto populated based on Pool Location selected
	*Pool Location	Required to save the record. Select appropriate location and type assignment. B-Pool for permanent assignments, C-Pool for vehicle assigned to the Central Pool, and Customer for customer owned equipment

Section	Title	Description
	Operational Status	<p>There are several status options:</p> <ul style="list-style-type: none"> • Operating - vehicle is in operational/active status • Maintenance - can be used for vehicles in maintenance for prolonged periods • New Asset - Used when a GSA vehicle is initially received prior to being placed into an operational status. Applicable to new asset records entered as part of the GSA file upload • No Longer in GSA Download - Applicable to GSA asset records that are no longer in the GSA file upload • Out of Service - Used when a vehicle is out of service for a prolonged period. Typically used when WHE is tagged “out-of-service” • Not Ready - Used when a Navy-owned vehicle is initially received prior to being placed into an operational status • Pending - Used when an asset is pending disposition, e.g., pending auction/sale, DRMO, transfer, etc. • Decommissioned - Used to indicate that the vehicle is no longer in an operational status, e.g., processed to DRMO, returned to GSA, transferred from the FEC’s custody, etc. See below for additional guidance
	*Customer Ref Code	Required to save a record. Refer to the CRC section that provides detailed information relative to the use and management of this field/data. Asset and IOID CRC must match
	Reference Location	Free form field for remarks
	GL Account	If the vehicle is customer owned then this field should be populated. This field will default to the work order GL Account field
	*Work Center	Required to save a record. Populate the assigned financial work center value
	*Location Code	Required to save a record. This field is used in part to calculate vehicle rental billing lines
	BSO UIC	Enter Budget Supporting Office UIC funding the vehicle. Will auto populate from IO Module in future
	Site	Auto populated field based on FEC
B <i>Vehicle Details Information</i>	*Equipment Code	Required to save the record. Enter the actual Equipment Code that reflects the equipment's configuration
	GSA Equipment Code	Designed to be populated via GSA interface. Can be manually entered to assist during GSA replacement vehicle selection
	Special Designator	Special Designator – used in conjunction with rental rates to indicate that a special rate applies to that specific vehicle, e.g., special designator “H” indicates that the vehicle incurs high mileage and a high mileage rate is applied to that vehicle

Section	Title	Description
	Priority	<p>The following values should be associated with the maintenance priority of the asset based on the vehicle's end-use. The FEC determines which value should be associated with the asset record:</p> <ul style="list-style-type: none"> • 5 - Urgent (mission critical) • 4 - Very High (support essential services) • 3 - High (vehicle is required to accomplish work) • 2 - Medium (work is adversely impacted if the vehicle is not available, but can be accomplished via alternatives at a productivity cost) • 1 - Low (work is adversely impacted if the vehicle is not available, but can be accomplished via alternatives at a lesser loss with respect to productivity cost)
	IO ID	Use of this field is mandatory. The inventory objective identification (IO ID) field is used to associate the IO (defined as a requirement) with a vehicle defined as the means to support the requirement. It is the Fleet Manager's responsibility at the respective PWD to ensure this field is populated correctly.
	Short Term and Long Term Rental Check Boxes	Short Term and Long Term Rental – IMPORTANT if these fields are not checked trip tickets cannot be created to reflect either short term or long term rental. These field should not be checked for customer owned equipment
	Alpha Code	Auto populates based on Equipment Code selected
	*Make	Required to save a record. Enter equipment/vehicle manufacturer from list
	*Model	Required to save a record. Enter the equipment/vehicle model
	*VIN #	Required to save a record. Enter equipment/vehicle VIN number
	*Year	Required to save a record. Enter vehicle year of manufacture
	*Fuel Type	<p>Required to save a record. Values are:</p> <ul style="list-style-type: none"> • CNG BI – Compressed Natural Gas Bi-Fuel • CNG DE - Compressed Natural Gas Dedicated • DSL DE - Diesel Dedicated • DSL HY - Diesel Hybrid • E85 FF - Ethanol 85 Flex fuel • ELE DE - Electric Dedicated • GAS DE - Gasoline Dedicated • GAS HY - Gasoline Hybrid • LNG BI - Liquid Natural Gas Bi-Fuel • LNG DE - Liquid Natural Gas Dedicated • LPG BI - Liquid Propane Gas Bi-Fuel • LPG DE - Liquid Propane Gas Dedicated • M85 FF - Methanol 85 Flex Fuel • None - None • PIH - Plug In Hybrid
	*Color	Required to save a record. Select vehicle color from the list
	*Gross Vehicle Weight	Required to save a record. Enter vehicle Gross Vehicle Weight
	Key tag	Enter spare key reference location value

Section	Title	Description
	Special Alert	Can be used to identify issues with an asset for a list to include CFR, EXECUTIVE, FUNDING, MISSING, RECALL, VIP, etc.
	Acquisition Date	Required to save a record. If "Custody Type" (Agency-Owned) is selected. Enter date vehicle was received
	*Received Date	Required to save a record. Enter date vehicle was received
	*In Service Date	Required to save a record. Enter date vehicle was placed in-service and assigned to a customer
C <i>Ownership Details Information</i>	*Owning Activity	Required to save a record. If the asset is FEC Managed (Navy Owned, GSA Lease, or Commercial) enter the FEC UIC. If the asset is customer owned, enter that customer's UIC
	*Custody Type	Required to save a record. Select custody type from the list: G - GSA: GSA vehicles funded by the FEC via a BOAC L - Leased: long term for a period exceeding 120 days O - Agency Owned: Navy owned vehicles or equipment S - Short Term Rental: commercially rented vehicles for a period of less than 120 days
	Custody Code	Select appropriate code from the list. This field should be used to identify Government Furnish Equipment (GFE) at a minimum
	Owned?	Check this box if asset is owned/managed by the FEC and to include asset in inventory count. IMPORTANT to leave box unchecked for customer owned equipment. Enter spare key reference location value
	GSA BOAC	Unused
D <i>Details Information</i>	Asset Type	Auto populates to type based on Equipment Code selected
	Asset Condition	Used to indicate asset's overall condition. Enter value from the list
	Parent	Unused
	Status Date	Auto-populated based on last change in asset status
	Asset Up?	To be renamed to "Telematics Installed?" Check the box if a telematics devices is installed
E <i>FAST Reporting Information</i>	*FAST Code	Required to save a record. Auto-populated based on Equipment Code selected
	GHG Score	Defaults to "0". Enter vehicle Greenhouse Gas Score make, model, and fuel type. http://www.fueleconomy.gov/feg/findacar.shtml
	GHG Exemption	Enter value from list. Selection of Equipment Code limits available values to be selected from the list
	State	Auto-populates from Zip Code field
	*Zip Code	Required to save a record. Enter asset's garaged location
	*Exemption ID	Required to save a record. Select appropriate value from the list
	MSA	Check this box if asset's garaged location falls within a Metropolitan Statistical Area https://www.afdc.energy.gov/vehiclesandfuels/epact/state/progs/dyn_ms_a.cgi
	Armor Level	Select value for the appropriate value if applicable. If no armor, leave field blank
	Returned to Vendor?	This field can be checked is a commercially leased vehicle is returned

Section	Title	Description
	Position Number	Unused
	Asset Template	Unused

Table 6-9: Asset (Tr) Field Descriptions - Main Tab

6.4.3.2 Maintenance Details Tab



Figure 6-11: Maintenance Details Tab

Section	Title	Description
F Maintenance Details Tab Information	Life Expectancy Years	Auto populated based on the Equipment Code selected
	Life Expectancy Odometer	Auto populated based on the Equipment Code selected
	Current Value	Calculated once a “Depreciation Schedule” is created via the “Select Action” menu selection, “Depreciation Schedule” value, and “Set Depreciation Schedule” function for Navy owned vehicles only
	Repair Limit (%)	Enter a percentage that will calculate a onetime repair threshold based on the acquisition cost or the depreciation value (if populated). This is used to alert maintenance personnel that the estimated repair cost exceeds a predetermined level established by management. Maintenance personnel should advise management of the cost to determine if the repairs should be completed
	Repair Limit Amount	Auto calculated based on Repair Limit (%) criteria and Acquisition Cost value
	Purchase Order	The RPN (Requisition Purchase Request Number)
	Acquisition Cost	Cost to purchase vehicle (defaults to 0.00) and entered for Navy Owned vehicles only
	Replacement Cost	Estimated cost to replace the vehicle and should include annual inflation (defaults to 0.00)
	Budgeted Cost	Amount budgeted to fund replacement
	Total Direct Cost	Normally blank
	Total Indirect Cost	Normally blank
	Total Indirect Cost YTD	Normally blank
	Certification?	Check box if vehicle requires a certification
	Last Certification Date	Enter last certification date
	Special Purpose Service?	Check box if Special Purpose Service equipment that represents a crane designated/certified to handle nuclear components
	Total Downtime	Defaults to 0.00
	Rebuilt/Overhaul Date	Normally blank
Rebuilt/Overhaul	Normally blank	

Table 6-10: Asset (Tr) Field Descriptions - Maintenance Details Sub Tab

6.4.3.3 **Lessor Tab**



Figure 6-12: Lessor Tab

Section	Title	Description
G Lessor Details Tab Information	Lessor	Select Lessor from List
	Address	Auto populated from List
	City	Auto populated from List
	State/Province	Auto populated from List
	Zip/Postal Code	Auto populated from List
	POC	Enter Point of Contact
	POC Phone	Enter Point of Contact phone number
	Lease Type	Select lease type from list
	Lease Expiration Date	Enter lease expiration date
	Monthly Base Rate Cost	If GSA vehicle, it will be auto populated by GSA Interface. All others will be entered manually
	Monthly Mileage Cost	If GSA vehicle, it will be auto populated by GSA Interface. All others will be entered manually
	Monthly Bill-Back Cost	If GSA vehicle, it will be auto populated by GSA Interface. All others will be entered manually
	Total Monthly Cost	If GSA vehicle, it will be auto populated by GSA Interface. All others will be entered manually
	Cumulative Base Rate Cost	Enter cumulative base rate cost data manually
	Cumulative Mileage Cost	Enter cumulative mileage cost data manually
Cumulative Bill-Back Cost	Enter cumulative bill-back cost data manually	
Total Cumulative Cost	Enter total cumulative cost data manually	

Table 6-11: Asset (Tr) Field Descriptions - Lessor Sub Tab

- Populate all fields if the asset is a GSA, commercially leased, short-term, or long-term rental asset.

6.4.3.4 **Dispatch Details Tab**



Figure 6-13: Dispatch Details Tab

Section	Title	Description
H Dispatch Details Tab Information	Dispatch Request	Auto populated from Vehicle Request module
	Assignment Location	Auto populated from Vehicle Request module
	Dispatch Location	Auto populated from Vehicle Request module
	Reported By	Auto populated from Vehicle Request module
	Operator Qualifications	Auto populated from Vehicle Request module
	Driver	Auto populated from Vehicle Request module
	Total Vehicle Rental Revenue	Auto populated from Vehicle Request module
	Actual Start Date	Auto populated from Vehicle Request module
	Estimated End Date	Auto populated from Vehicle Request module
	Assigned Driver	Auto populated from Vehicle Request module
	Rate Schedule	Auto populated from Vehicle Request module
	Rental Type	Auto populated from Vehicle Request module

Table 6-12: Asset (Tr) Field Descriptions - Dispatch Details Sub Tab

6.4.3.5 Disposal Details Tab

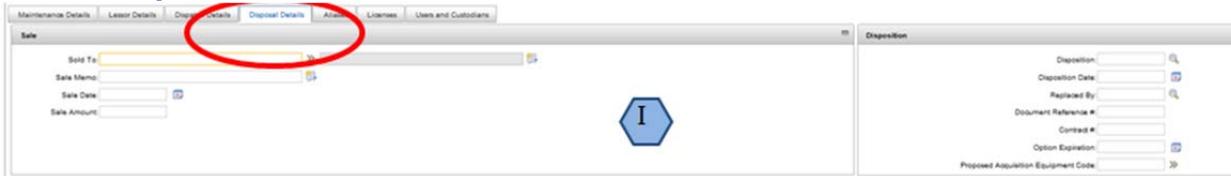


Figure 6-14: Disposal Details Sub Tab

Detailed Descriptions of Disposal Details Sub Tab

Section	Title	Description
I Disposal Details Tab Information	Sold To	Enter the name of the person/company to whom the vehicle was sold
	Sale Memo	Used to record any information applicable to the disposition of the vehicle, e.g., the location of the servicing DRMO, specific data relevant to the disposition of the vehicle, etc.
	Sale Date	Enter date vehicle was sold
	Sale Amount	Enter monetary amount for which vehicle was sold
	Disposition	Select from list of disposition causes - Auction, Disaster Relief, DRMO, Returned, Sold, and Transferred
	Disposition Date	Enter date vehicle was officially removed from FEC custody
	Replaced By	Enter the Asset number of each vehicle that was purchased or leased to replace this vehicle. This is import to establish a relationship between NWCF vehicles that were sold and vehicle procured base sale proceeds
	Document Reference #	Enter document number used to reference the sale
	Contract #	Enter contract number used to auction vehicles
	Option Expiration	Enter the expiration date for auction contract as applicable
	Proposed Acquisition Equipment Code	To be removed
Rental Type	Auto populated from Vehicle Scheduling module Trip Ticket	

Table 6-13: Asset (Tr) Field Descriptions - Disposal Details Sub Tab

6.4.3.6 Aliases Tab



Figure 6-15: Aliases Tab

Detailed Descriptions of Aliases Sub Tab

Section	Title	Description
J <i>Aliases Tab Information</i>	Alias	Used to capture previous asset numbers associated with the equipment record if tag are lost or stolen
	Description	Used to record any additional information to explain the details of why an alias is required, date incident occurred, date new tags ordered, etc.
	Active	If more than one alias is present, check box to display most recent alias value
	Default	Check this box to enable alias field to display on asset record's main tab

Table 6-14: Asset (Tr) Field Descriptions - Alias Sub Tab

6.4.3.7 Licenses Tab

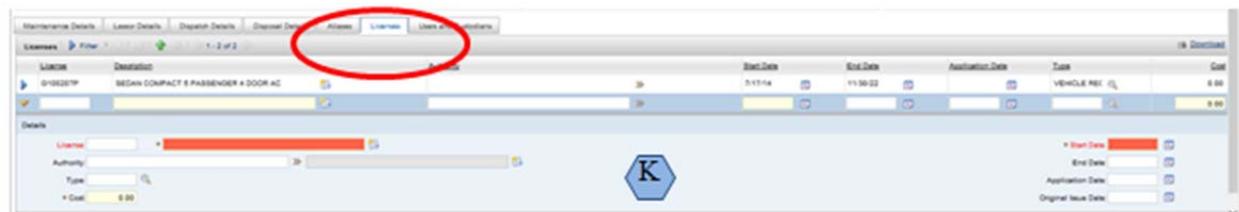


Figure 6-16: Licenses Tab

Detailed Descriptions of License Tab

Section	Title	Description
K <i>License Tab Information</i>	License	Enter asset tag number
	Description	Copy and paste asset description
	Authority	Blank
	Type	Vehicle Registration
	Cost	Cost to register vehicle. Defaults to \$0.00
	Start Date	Enter the date vehicle registration begins
	End Date	Enter the date vehicle registration expires (use last day of the month)
	Application Date	Enter the date registration was requested
	Original Issue Date	Original issue date normally blank unless additional tags were ordered.

Table 6-15: Asset (Tr) Field Descriptions - License Tab Information

6.4.3.8 Users and Custodians Tab

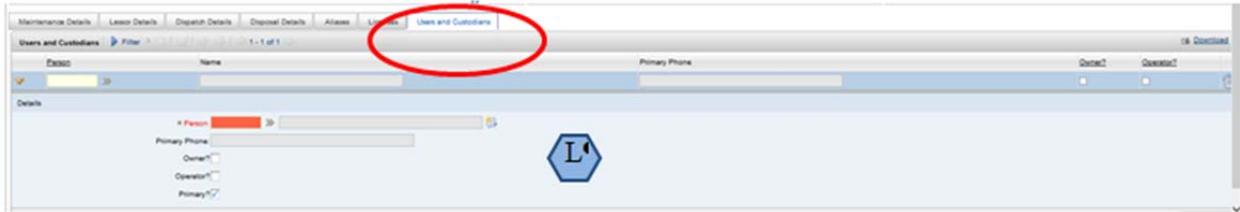


Figure 6-17: Asset (Tr) Field Descriptions - Users and Custodians Tab

Detailed Descriptions of Users and Custodians Tab (Vehicle Coordinator)

Section	Title	Description
L Users and Custodians Tab Information	Person	Select Point of Contact/Custodian's name from list
	Primary Phone	Enter Point of Contact phone number
	Owner?	This box is unchecked
	Operator?	This box is unchecked
	Primary?	Check this box if the person is the primary Point of contact

Table 6-16: Asset (Tr) Field Descriptions - Users and Custodians Tab (Vehicle Coordinator)

6.4.3.9 Meters Tab

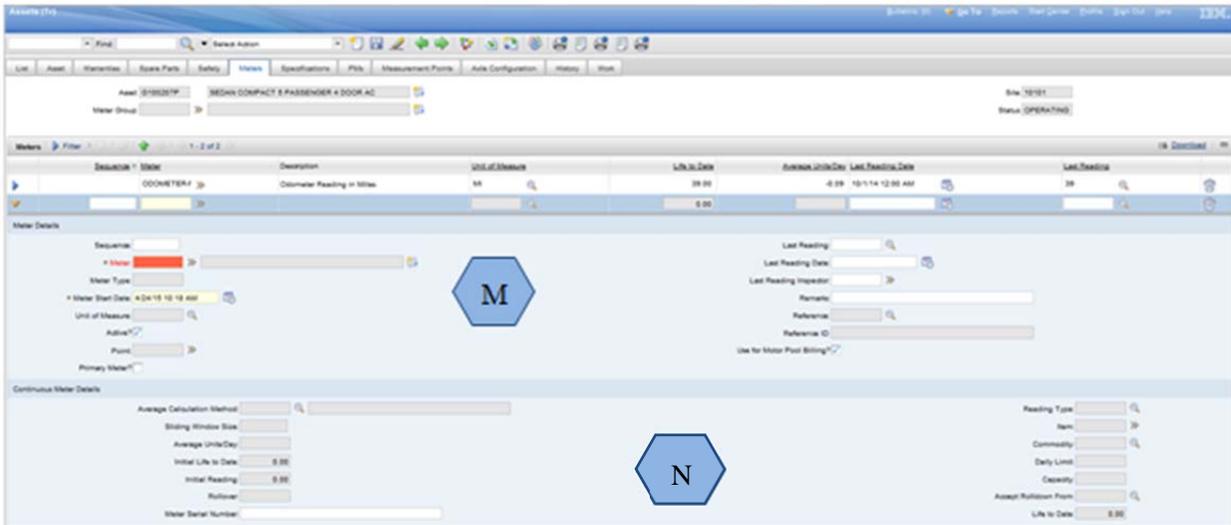


Figure 6-18: Asset (Tr) - Meters Main Tab

Detailed Descriptions of Meters Tab

Section	Title	Description
<p>M Meters Tab (Meter Details) Information</p>	Sequence	Used to establish sequential order when vehicle equipped with multiple meters
	Meter	Use ODOMETER-M for miles, ODOMETER-K for kilometers, and HOURS for hours only
	Meter Type	Defaults to CONTINUOUS
	Meter Start Date	Defaults to current date and time
	Unit of Measure	Select MI for ODOMETER-M, KI for ODOMETER-K, and HR for HOURS
	Active	Check box defaults to Active
	Point	Not used
	Primary Meter?	Check this box for primary meter. If more than one type of meter on the vehicle, check this box for PM criteria used. If this box is not checked, meter readings will not be displayed on work orders
	Last Reading	Auto populated from previous meter reading
	Last Reading Date	Auto populated from previous meter reading
	Last Reading Inspector	Auto populated from previous meter reading
	Remarks	Free form field for remarks
	Reference	Auto populated from previous meter reading
	Reference ID	Auto populated from previous meter reading
	Use for Motor Pool Billing?	Should never be checked. Used to bill based on mileage
<p>N Meters Tab (Continuous Meter Details) Information</p>	Average Calculation Method	Select All from the list
	Sliding Window Size	To be eliminated
	Average Units/Day	Not used
	Initial Life Reading	Enter initial meter reading
	Rollover	Enter the value of nine for the number of characters on the odometer
	Meter Serial Number	Enter meter serial number if original meter has been replaced
	Reading Type	Always select Actual from the list
	Item	Not used
	Commodity	Not used
	Daily Limit	Not used
	Capacity	Not used
	Accept Roll down From?	Select Asset from the list
	Life to Date	Shows meter life to date reading

Table 6-17: Asset (Tr) Field Descriptions - Meter Tab Information

6.4.4 Processes for Asset (Tr)

6.4.4.1 Creating an Asset Record Process

1. Select new record icon. Mandatory fields to save the record are highlighted in red.

Table 6-18: Asset (Tr) Create new record

2. Asset field - enter asset tag number.
3. License Plate field - enter license plate number attached to the vehicle. If the vehicle has a state or foreign plate, enter that number in this field.
4. Pool Location field - select the pool location from list. Ensure equipment not owned or managed by the FEC is placed in the appropriate Customer pool location.
5. Operational Status field – will default to Not Ready.
6. Customer Reference Code field - select the Customer Reference Code from the list. The Customer Reference Code entered MUST match the Customer Reference Code with the Inventory Objective linked to the asset.
7. Reference Location field - enter applicable identifying information in the Reference Location free form field.
8. GL Account field - enter the appropriate GL Account for customer owned equipment. If owned or managed by the FEC, leave this field blank.
9. Work Center field - select correct financial Work Center from the list.
10. Location Code field – this field will auto populate when the Equipment Code is entered.
11. BSO UIC - this field will be auto populated from the Inventory Objective module in the future.
12. Equipment Code field - select the correct Equipment Code from the list.
13. Priority field - enter the appropriate maintenance priority code value (5-1).
14. IO ID field - enter the correct Inventory Objective to link the asset. The Customer Reference Code entered MUST match the Customer Reference Code with the Inventory Objective linked to the asset.
15. Short-term and Long-Term Check boxes – check these boxes as appropriate.
16. Make field - enter the appropriate vehicle Make from the list.
17. Model field - enter the vehicle Model in the free form field.
18. VIN # field - enter the correct VIN number.
19. Year field - enter the vehicle year of manufacture.
20. Fuel Type field - enter the fuel type from the list.
21. Color field - enter the vehicle color from the list.
22. Gross Vehicle Weight - enter the Gross Vehicle Weight for the vehicle.
23. Key tag field - Enter the vehicle spare key reference location.
24. Special Alert field - enter the Special Alert as applicable.

25. Acquisition Date field - enter date of Acquisition Date if a Navy owned asset.
26. Received Date - enter the appropriate value in the Date Received field.
27. In Service Date - enter the date the date the vehicle is placed in service.
28. Owning Activity field - enter the FEC UIC in the Owning Activity field if FEC owned or managed. If customer owned, use the customer's UIC in this field.
29. Custody Type field - enter the appropriate value from the list.
30. Custody Code field - enter the appropriate code as applicable from the list.
31. Owned? Field - this check box must be checked if the asset is FEC owned or managed.
32. FAST Code field - will be auto populated based on the Equipment Code selected.
33. GHG Score field - enter the score based from the web site based on vehicle fuel type.
34. GHG Exemption field - enter applicable value from the list.
35. Zip Code field - enter vehicle garage location zip code.
36. Exemption ID field - enter the appropriate value from the list.
37. MSA field - check this box if zip code is located within a MSA/CMSA.
38. Armor Level field - enter value from the list as applicable.

6.4.4.2 Creating a Meter Process

A meter must be created for every vehicle that has an odometer and/or hour meter. Creating a meter facilitates the ability to input meter readings that are used in support of PM scheduling, tracking mileage utilization, and administering metrics.

Emphasis should be directed on updating and maintaining accurate meter readings/meter data. Updating meters principally supports two fleet management needs: Preventative Maintenance schedules that utilize a meter, and time-based PM frequencies.

1. Select Meter tab on the Assets (Tr) module.

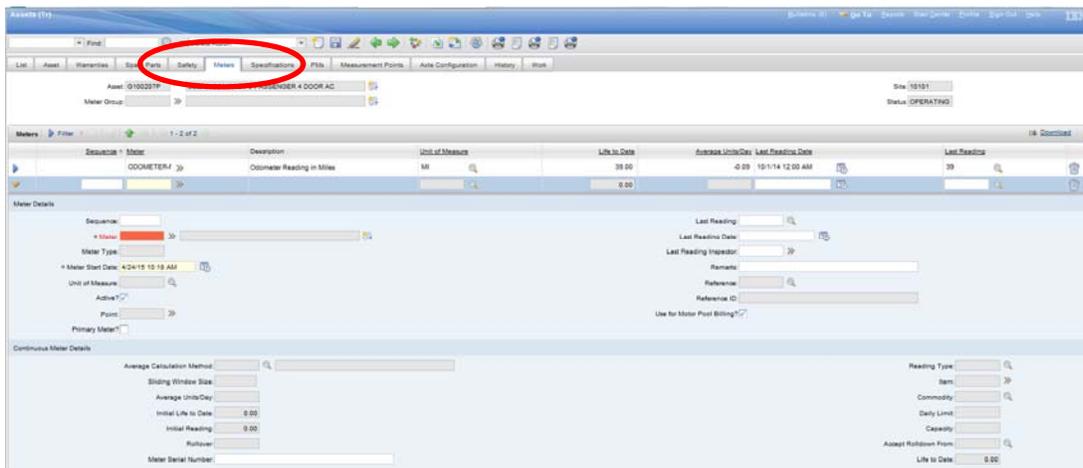


Figure 6-19: Asset (Tr) - Create new meter reading

2. Select New Row.
3. Meter field - select meter type from the list.
4. Average Calculation Method field - always select all from the list.
5. Rollover field - enter rollover normally "999,999".

*Initial set up for meter reading should be set to zero. This is to allow for future changes to be made if erroneous meter readings are entered.

6.4.4.3 Decommissioning Equipment Process

Once vehicle/equipment custody has transferred via a sale, returned to GSA, transferred to DRMO, or transferred out of FEC custody, the operational status will be changed to Decommissioned.

1. Change status to Decommissioned (See below)
2. Select Change Status icon.
3. Select New Status drop down list.

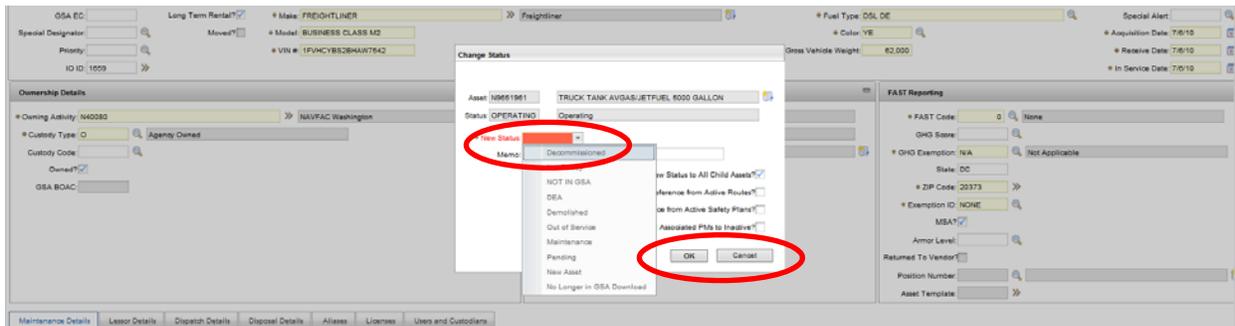


Figure 6-20: Asset (Tr) – Status change to Decommissioned – Process step 1,2 & 3

4. Check ALL boxes to Remove Asset Reference from Active Routes, Active Safety Plans, and Change the Status of all Associated PMs to inactive. (See below)

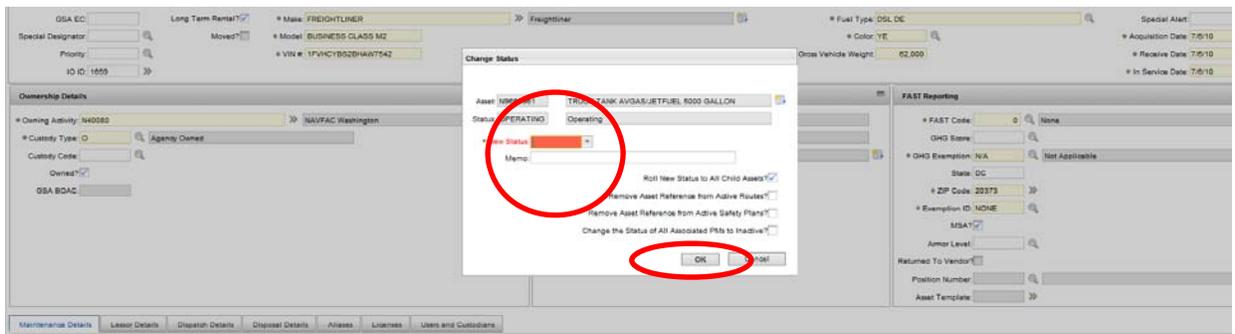


Figure 6-21: Asset (Tr) – Decommissioning Equipment – Process step 4

5. Close trip ticket
6. Remove IO ID
7. Collect fuel card

6.4.4.4 Entering Telematics Device Information Process

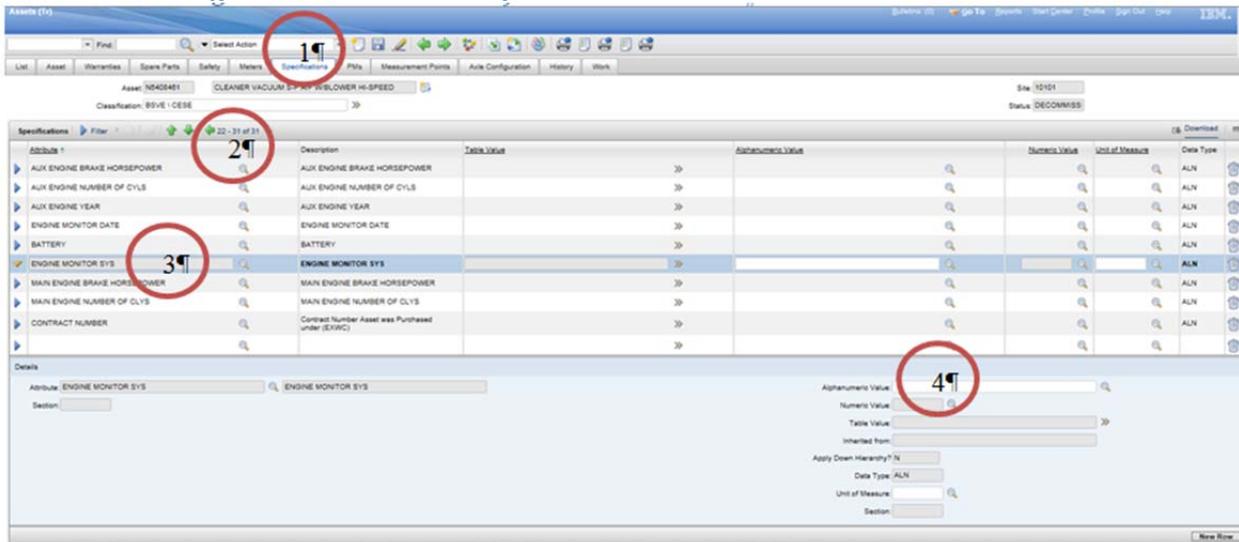


Figure 6-22: Asset (Tr) – Entering Telematics Device Information – Process step 1,2,3 & 4

1. Select the Specifications tab in Assets (Tr) module.
2. Forward to third page of values
3. Click on arrow on Engine Monitor SYS row
4. Enter telematics device serial number in the Alphanumeric Value field

6.4.4.5 Customer Reference Code Review

The CRCs should be periodically reviewed (no less than annually) to ensure that they are correctly associated to each equipment record. Additionally, each FEC/PWD should develop, communicate, and effectively employ a process to ensure that the equipment record CRC is updated (if required) to reflect the current CRC when vehicles are dispatched or serviced. The corporate CRC list is located on the NAVFAC Portal: see Appendix F002 of the MUG for the MOST CURRENT version - there are three files (PDF, XLSX, and DOCX) on the MUG page.

Dispatching: If a dispatcher creates a trip ticket (B-Pool or C-Pool) and recognizes that the defaulted CRC is incorrect, that person should contact the Fleet Manager (or person responsible to manage that equipment record) and communicate/determine the correct CRC. Once determined, the equipment record should be updated to reflect the correct CRC.

- Vehicle Maintenance: If personnel create a maintenance work order and recognize that the defaulted CRC is incorrect, that person should contact the Fleet Manager (or person responsible to manage that equipment record) and communicate/determine the correct CRC. Once determined, the equipment record should be updated to reflect the correct CRC.

6.5 Rate Schedules (Tr) Module

6.5.1 Module Overview

The Rate Schedules (Tr) Application supports the creation of EC rate records used to generate billing lines within the Vehicle Scheduling (Tr) application, i.e., trip tickets.

Regarding the policy of creating and using hourly, daily, and monthly rental rates, refer to the Vehicle Scheduling (Tr) section. It provides detailed information relative to applying short- and long-term rental types to trip tickets. It is critical that the policy is understood prior to creating new rates.

If an existing rate is modified or a new rate is created, an automated process will export the file to DWAS on a daily basis. Once DWAS is updated, an acknowledgement file is sent to Maximo. Maximo will automatically process the file and update the rate record with the DWAS status and DWAS date.

6.5.2 Critical Success Factors

Critical fields are defined as (1) required to save a record and (2) is important in terms of associating data to equipment records that is essential to report fleet management data and produce metrics. Every effort should be directed to populate all applicable fields.

6.5.3 Module Application Tabs

6.5.3.1 Main Tab

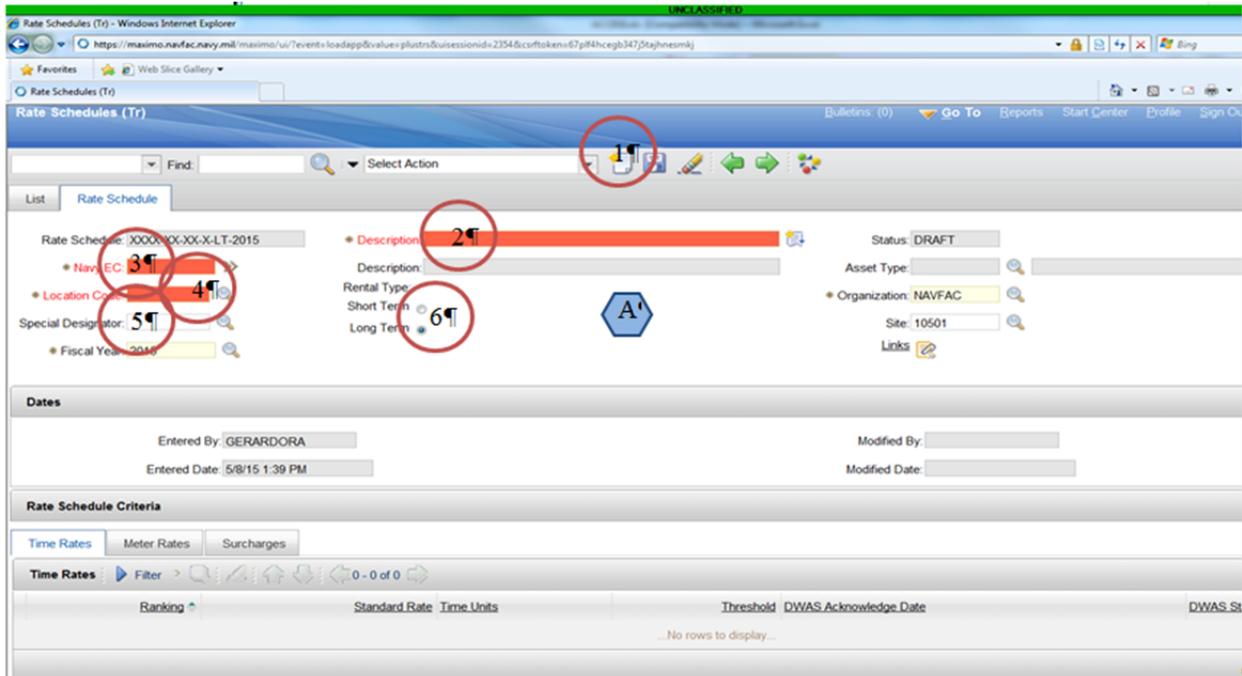


Figure 6-23: Rate Schedule (Tr) Module Tab

Detailed Description of Rate Schedules (Tr) Module

Section	Title	Description
A <i>Rates Schedule Tab Information</i>	*Rate Schedule	Required to save a record. Enter EC description as the Rate Schedule Description Sample rate schedule appears as “XXXX-XX-XX-X-LT-2015” when a new record is created. This field is auto-populated when the following fields are populated
	*Navy EC	Required field to save a record. Select the appropriate EC value. Sample: 0061-00, rate schedule = 0061-00-XX-X-LT-2015
	*Location Code	Required field to save a record. Select the appropriate Location Code value
	Special Designator	Select the appropriate Special Designator value Sample: H, rate schedule = 0061-00-40-H-LT-2015. If no value is selected, the value remains as an “X”
	*Fiscal Year	Required field to save a record. The current FY defaults to a new record
	Rental Type	Short Term or Long Term radio buttons – is a required field to save a record. The long term values defaults to a new record. Select the appropriate radio button
	Status	This field defaults to "DRAFT". o Must be changed to “Active” before it can be associated with an EC to generate a billing line on a trip ticket
	Asset Type	Defaults based on Equipment Code selected
	*Organization	Required to save a record. Select only value available "NAVFAC"
	Site	Auto populated field based on FEC

Table 6-19: Rates Schedule Field Descriptions –Rate Schedule Tab Information

6.5.4 Process for Rate Schedules (Tr)

6.5.4.1 Enter a new Rate Schedules (Tr)

1. Select new record icon.
2. Description field – enter corporate Equipment Code definition.
3. Navy EC field – enter corporate Equipment Code numerical value.
4. Location Code field – enter FEC location code.
5. Special Designator field – enter value representing special designator if applicable.
6. Rental Type button – select Short Term or Long Term as applicable.

Rate Schedule Criteria Sub Tab

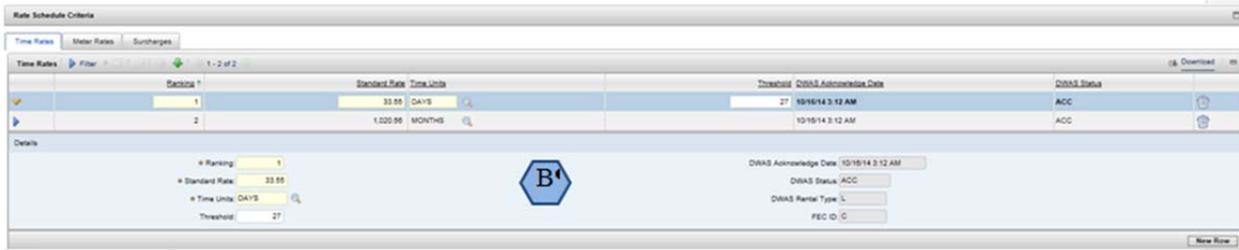


Figure 6-24: Rate Schedule Criteria Sub Tab

Detailed Description of Rate Schedules (Tr) Module Time Rates Sub Tab

Section	Title	Description
<p style="text-align: center;">B <i>Rates Schedule- Time Rates Tab Information</i></p>	Ranking	The ranking value should be in chronological orders, i.e., 1,2, etc.
	Standard Rate	Enter the rental rate value that is applicable to the "Time Units" value
	Time Units	<p>Short-Term rental type utilizes HOURS and DAYS (daily) units.</p> <ul style="list-style-type: none"> • Hourly rates – the “Threshold” should be set at 8 hours. • Daily Rates – create short-term daily rates if applicable to FEC. The “Threshold” field should not be populated Long-Term rental type utilizes DAYS (daily) and MONTHLY units. • Daily rates – the “Threshold” should be set at 27. • Monthly rates – the “Threshold” field should not be populated. <p>Policy/rationale is provided in the Vehicle Scheduling (Tr) section of this document regarding rate creation as it applies to dispatching/rental type use</p>
	DWAS Acknowledge Date	Populated via the Rate-file interface
	DWAS Status	Populated via the Rate-file interface
	DWAS Rental Type	Populated based on previous rate schedule data selected
	FEC ID	Populated based on previous rate schedule data selected

Table 6-20: Rates Schedule (Tr) Field Descriptions – Time Rates Tab Information

6.6 FAST Locations (Tr) Module

6.6.1 Module Overview

The FAST Locations (Tr) Application supports the creation of records used to populate the Assets (Tr) module FAST Reporting sub tab. If a needed zip code value representing a garaged location for a vehicle is not present, a new record can be created to show actual vehicle location.

6.6.2 Critical Success Factors

Critical fields are defined as (1) required to save a record and (2) is important in terms of associating data to equipment records that is essential to report fleet management data and produce metrics. Every effort should be directed to populate all applicable fields.

6.6.3 Module Tabs

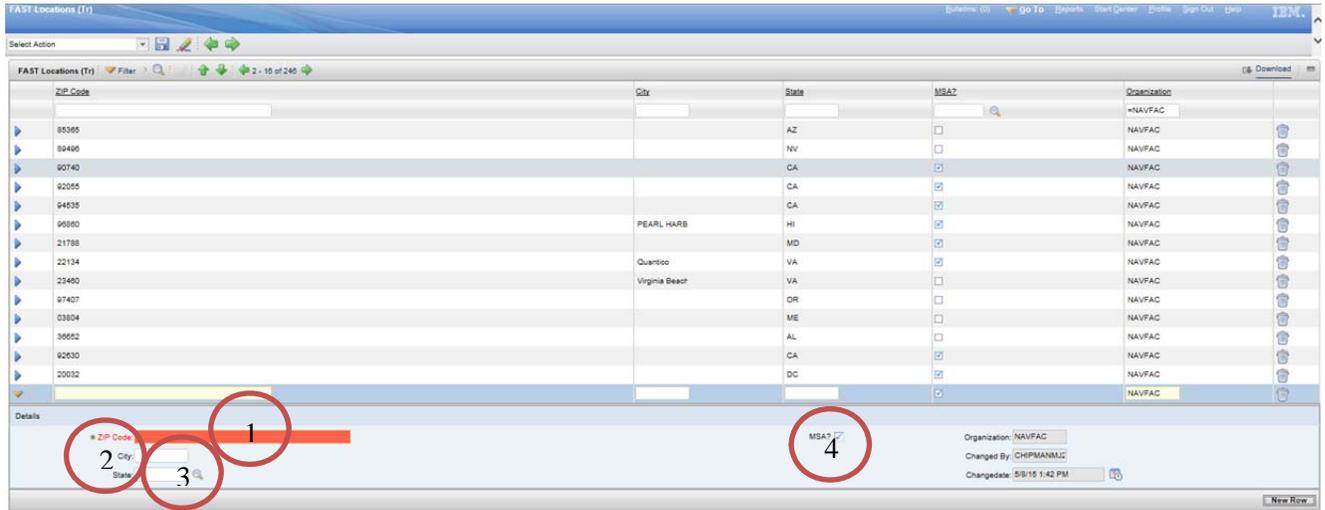


Figure 6-25: FAST Locations (Tr) Module Tab

Detailed Description of FAST Locations (Tr) Module

Section	Title	Description
FAST Locations (Tr) Tab Information	*Zip Code	Required field to save a record. Enter applicable zip code for vehicle garaged location
	City	Enter city name
	State	Select state from list
	MSA?	Check box if zip code is located within a MSA/CMSA. https://www.afdc.energy.gov/vehiclesandfuels/epact/state/progs/dyn_msa.cgi
	Organization	Auto populated by system
	FEC ID	Auto populated by system
	Change date	Auto populated by system

Table 6-21: FAST Locations (Tr) Field Descriptions – Tab Information

6.6.4 Process for FAST Locations (Tr)

6.6.4.1 Enter new FAST Locations

1. Zip Code field - enter appropriate zip code for vehicle garage location.
2. City field – enter appropriate city associated with zip code.
3. State field – enter appropriate state from the list.
4. MSA? Field – check this box is zip code falls within a MSA/CMSA.

6.7 Vehicle Request (Tr) Module

6.7.1 Module Overview

The Vehicle Request (Tr) Application is used to generate a trip ticket number to capture the estimated start and end dates needed for vehicle/equipment rental, and/or BSVE operations service.

6.7.2 Business Objective

The Vehicle Request (Tr) Application is used to enter request for vehicle/equipment rental, and /or Base Support Vehicle and Equipment (BSVE) service operation. The request may be entered directly in the Vehicle Request (Tr) Module, or by entering it into the vehicle request pop-up window located in the Vehicle Scheduling (Tr) Module.

6.7.3 Critical Success Factors

To establish an initial request in the Vehicle Request (Tr) Application the following is needed:

1. Description – the purpose of the vehicle request.
2. Rental Type – short or long term.
3. Estimated start and end dates.
4. Point of Contact information (i.e. name, phone number).

6.7.4 Module Application Tabs



Figure 6-26: Vehicle Request (Tr)

Detailed Description of Vehicle Request (Tr) FAST Descriptions Tabs

Tabs	Description
List	Used to search Maximo for work order records
Vehicle Request	Use to create, view, or modify Vehicle Request records

Table 6-22: Vehicle Request (Tr) Field Descriptions - Tab Descriptions

6.7.5 Process for Vehicle Request (Tr)

6.7.5.1 Creating a Vehicle Request

The following section contains descriptions and screenshots of the Vehicle Request tab. The screenshots include instructions and descriptions of required information.

Figure 6-27: Vehicle Request New Record Icon

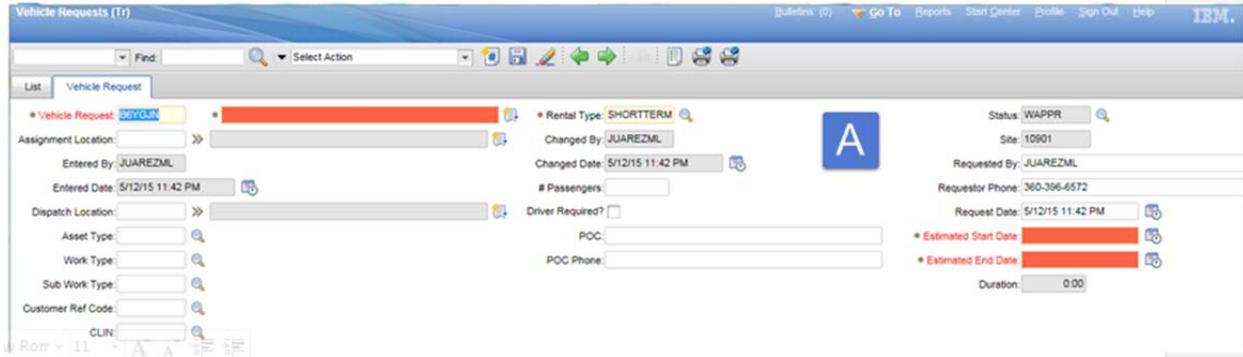


Figure 6-28: Vehicle Requests (Tr) Tab

Detailed Description of Vehicle Request (Tr) Tab

Section	Title	Description
<p style="text-align: center;">A Vehicle Request Tab</p>	Vehicle Request	Auto-populates a work order number
	Vehicle Request Description	Required to save record. Describe the purpose of the vehicle request
	Assignment location	Self-explanatory – Contains a select value list
	Entered By	Auto-populated field; unchangeable field
	Entered Date	Auto-populated field; unchangeable field
	Dispatch Location	Self-explanatory – Contains a select value list
	Asset Type	Self-Explanatory; Select Value Field
	Work Type	<p>Select Value Field; Enables Fleet Managers to group work execution based on hierarchy</p> <p>BSVE Work types:</p> <ul style="list-style-type: none"> • BSVE Maintenance – not used for vehicle requests or scheduling, work order use only • BSVE Refuse – not used for vehicle requests or scheduling, work order use only • BSVE Ops – should be used when a PWD driver (Motor Vehicle Operator (MVO) or Equipment Operator (EO) and vehicle/equipment are dispatched to support an operational requirement. • BSVE Rent/Lease – associated with C and B-Pool vehicle rental type dispatches. • BSVE WHE – associated with cranes dispatched.
Sub Work Type	<p>Select Value Field; Enables Fleet Managers to group work execution based on hierarchy; Options for value depend on Work Type Selection. The following sub-work type options are available for each specified work type(s):</p> <p>Work Type: BSVE Rent/Lease</p> <p>Sub Work Type:</p> <ul style="list-style-type: none"> • Long Term– Lease period exceeding more than 59 days in duration. • Short Term– Lease period less than 60 days in duration. 	

Section	Title	Description
		<p>Work Type: BSVE Operations Sub-Work Type: Asphalt – self-explanatory EEO– represents Equipment Operator (EO) MVO– represents Motor Vehicle Operator (MVO)</p>
		<p>Work Type: BSVE WHE Sub-Work Type:</p> <ul style="list-style-type: none"> • Facility Support - facility support provided using WHE or MHE in support of a facilities related job, e.g., move HVAC components, etc. • General Services - all other WHE requests that are not otherwise defined • Load Stores - loading ship stores by means of WHE or MHE. • Ordnance - ordnance operations being supported by WHE or MHE. • Perishable Load - providing WHE or MHE in support of the movement of perishable goods. • Ship Movements - Defined as providing WHE or MHE in support of incoming or departing of ships. • Shipmaint Suprt -WHE or MHE in support of ship maintenance services. • Tr Maint Support - Defined as providing WHE services in support of PW transportation services. There are no associated Service Codes. • Wtrfrnt Supprt - Defined as providing WHE services in support of water front services.
	Customer Ref Code	Select accurate Customer Reference Code (CRC)
	CLIN	Select accurate CLIN - Site specific
	Rental Type	Defaults to short-term, but may choose long term as applicable
	Changed By	Auto-populated field
	Changed Date	Auto-populated field
	# of Passengers	Self-Explanatory
	Driver Required	Check box enabled field; Self-Explanatory
	POC	Name of Point of Contact, critical field
	POC Phone	Self-Explanatory, critical field
	Status	Auto-populated field, status updates when vehicle is scheduled; unchangeable field
	Site	Auto-populated based on site id
	Requested By	Auto-populated field
	Requestor Phone	Auto-populated field
	Request Date	Auto-populated field
	Estimated Start Date	Self-Explanatory, mandatory field
	Estimated End Date	Self-Explanatory, mandatory field
	Duration	Auto-populated field based on dates and times chosen, unchangeable field

Table 6-23: Vehicle Request Tab - Field Descriptions

Create the Vehicle Request:

1. Select the “New Record Icon” to generate a Vehicle Request
2. IMPORTANT: Annotate ticket number.
3. Complete fields as applicable to your request.
4. Select save icon.
5. Go to Vehicle Scheduling (Tr) Application to dispatch request.

Canceling Vehicle Requests:

A vehicle request may be cancelled if a Trip Ticket has not been started.

1. Select the “Select Action” drop down menu.
2. Select “Cancel Vehicle Request” – Change Status pop-up window will appear.
3. Under the “New Status” drop down choose “canceled.”
4. Change to applicable date and input reason in the memo field.
5. Select “OK.”

6.8 Vehicle Scheduling (Tr) Module

6.8.1 Module Overview

The Vehicle Scheduling (Tr) Application is used to create vehicle/service trip tickets to bill customers for service provided.

6.8.2 Business Objective

The Vehicle Scheduling (Tr) Application is used to create vehicle request and administer trip tickets. It contains billing data which must be checked for accuracy. Regarding the dispatching of vehicles, it provides the dispatcher the capability to check vehicle availability to support dispatching requirements.

6.8.3 Critical Success Factors

The factors that contribute to the Vehicle Scheduling (Tr) Application include:

- Properly annotate the requirement in the description
- Estimated start and end dates
- Point of contact information: name, phone etc.
- Necessary funding information

Maximo does not have a function to reduce billing hours while B-Pool assets are out-of- service due to maintenance. NAVFAC policy is:

- B-Pool assets: Trip tickets will not be completed while a vehicle is out-of-service due to maintenance. The trip ticket will continue to accrue billing hours during that period.
- C-Pool assets: No change to the current process. Trip tickets will be completed prior to a vehicle going out-of-service due to maintenance.

6.8.4 Module Application Tabs

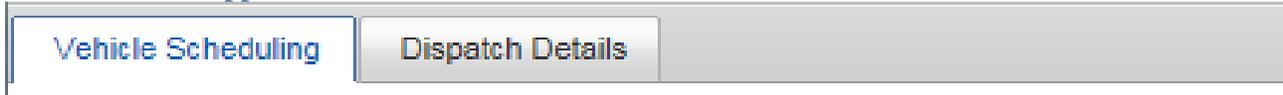


Figure 6-29: Vehicle Scheduling (Tr) Module Tabs

Detailed Description of Vehicle Scheduling (Tr) Tabs

Tab	Description
Vehicle Scheduling	Used to schedule the vehicle, or trucking operations request
Dispatch Details	Used to review the details of the trip ticket, which includes the billing line details

Table 6-24: Vehicle Scheduling (Tr) Tab - Field Descriptions

6.8.5 Vehicle Scheduling (Tr) Processes

6.8.5.1 Creating a Vehicle Request, Starting and Completing a Trip Ticket

The following section contains descriptions and screenshots of the Vehicle Scheduling tab. The screenshots and tables throughout include instructions and descriptions of required information.

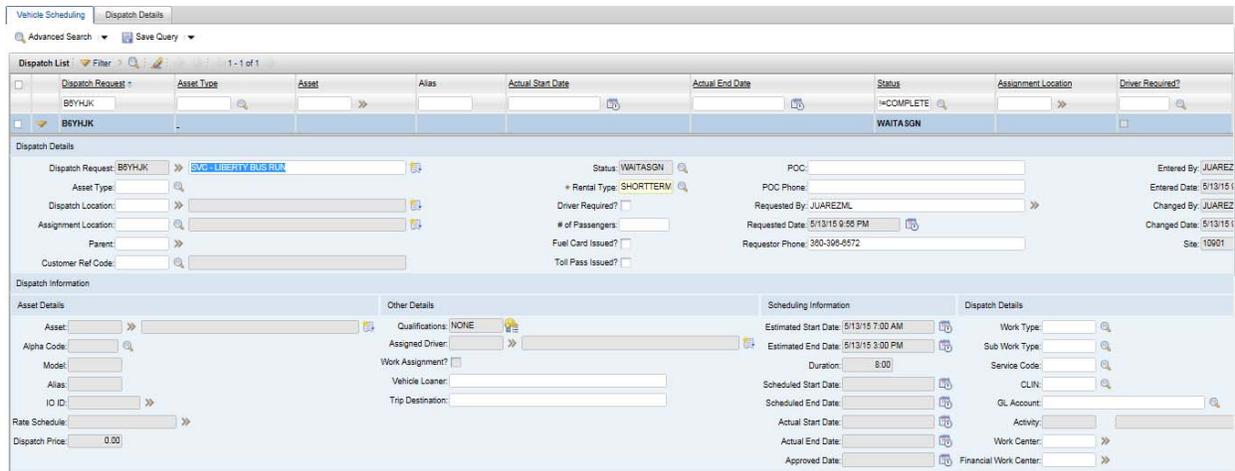


Figure 6-30: Vehicle Scheduling (Tr)

Detailed Description of FAST Locations (Tr) Module

Section	Title	Description
A <i>Dispatch Details</i>	Dispatch Request	System Generated Field
	Dispatch Description	Annotate the purpose/reason of the dispatch request
	Asset Type	Auto populates based on assigned asset
	Assignment Location	Select from Value list. This is the work location of the person who requested the vehicle. This is the location the vehicle should be dispatched to.
	Dispatch Location	Auto populates based on assigned asset. This is the location of the vehicle that will be dispatched.

Section	Title	Description
	Parent	Parent of the dispatch shown in the Dispatch Request field. When this field is blank, the dispatch in the Dispatch Request field is a top-level dispatch.
	Customer Ref Code	Select from Value list appropriate Customer Reference Code (CRC)
	Status	Status of the assignment, such as waiting for approval, approved, in progress, canceled, completed, or closed
	Rental Type	Select from Value List: LONGTERM or SHORTTERM
	Driver Required?	Check box that specifies whether you should provide a driver with the dispatched vehicle. If the check box is selected, you must assign a driver to the dispatch request
	# of Passengers	Number of passengers the vehicle should accommodate
	Fuel Card Issued	Check box that specifies whether the dispatch request has follow-up work. If the check box is selected, there is Fuel Card Issued. If the check box is cleared (the default), there is no follow-up work.
	Toll Pass Issued?	Check box that specifies whether the dispatch request has follow-up work. If the check box is selected, there is Toll Pass Issued. If the check box is cleared (the default), there is no follow-up work.
	POC	CORE Activity/Customer Point of Contact Mechanism
	POC Phone	Customer Point of Contact's Phone Number
	Reported By	User that requested the vehicle.
	Requested Date	The date that the vehicle request was submitted.
B <i>Asset Details</i>	Requestor Phone	Phone number (usually a work site telephone number) associated with the vehicle request/dispatch. If the Requested By person has a phone number associated with it, that number is the default for this field.
	Asset	Asset or vehicle that is assigned to the vehicle request.
	Asset Description	Auto populates based on assigned asset
	Alpha Code	Auto populates based on assigned asset
	Make	Auto populates based on assigned asset
	Model	Auto populates based on assigned asset
	Alias	Auto populates based on assigned asset
	IO ID	Auto populates based on assigned asset
	Rate Schedule	The rate schedule used to calculate the billing rates for this assignment.
	Total Dispatch Price	Total price for the dispatch assignment.
C <i>Other Details</i>	Qualifications	The qualifications that are needed to operate the asset. If no qualifications are required to operate the asset, the field reads NONE. If a single qualification is required, it is listed in this field. If more than one qualification is required, the field reads MULTIPLE. Click the Qualifications icon to view, edit, or add qualifications that are required to operate the asset.
	Assigned Driver	Labor code of the driver assigned to the dispatch request.
	Work Assignment	Check box that specifies whether this dispatch should be considered a work assignment for the driver.
	Vehicle Loaner	Vehicle loaner information
	Trip Destination	Trip destination
D	Estimated Start Date	Pick-up date or target start date for vehicle use.

Section	Title	Description
<i>Scheduling Info</i>	Estimated End Date	Date the vehicle dispatch is targeted to be completed.
	Duration	Auto Calculated field. Estimated number of hours needed to complete the dispatch request.
	Scheduled Start Date	Date and time the vehicle dispatch is scheduled to begin.
	Scheduled End Date	Date and time the vehicle dispatch is scheduled to be completed.
	Actual Start Date	Date and time the vehicle dispatch began.
	Actual End Date	Date and time the vehicle dispatch was completed.
	Approved Date	The Date on which the Work Order was last approved.
E <i>Dispatch Details</i>	Work Type	Auto populates from vehicle request. See Vehicle Request field for more detailed definition and correlation.
	Sub Work Type	Auto populates from vehicle request. See Vehicle Request field for more detailed definition and correlation.
	Service Code	Select from Value List appropriate Service Code.
	CLIN	Select from Value List appropriate CLIN.
	GL Account	Enter or Select from Value List appropriate GL Account.
	Activity	Select from Value List appropriate Activity UIC.
	Work Center	Person group responsible for the dispatch request. Person groups are set up in the Person Groups application.
Financial Work Center	Financial Work Center. Not to be confused with Performance work center.	

Table 6-25: Vehicle Scheduling (Tr) - Field Descriptions

Figure 6-31: New Record Icon

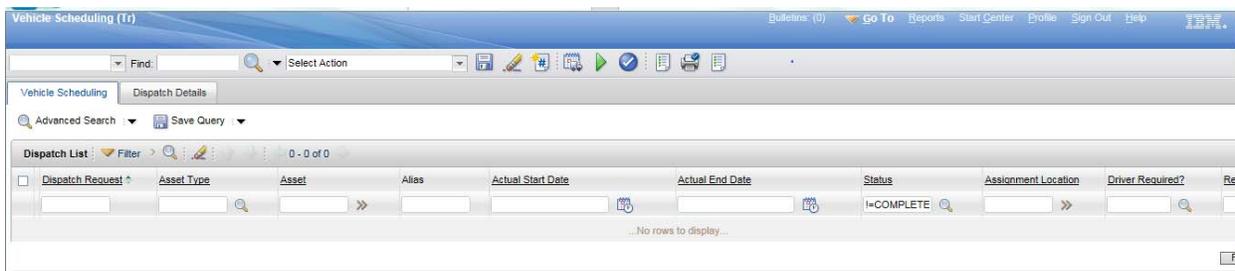


Figure 6-32: Vehicle Scheduling (Tr) Module

Figure 6-33: Create New Vehicle Request - Pop-Up Window

Create the Vehicle Request (These steps mimic creation of a vehicle request, see Vehicle Request for reference as needed):

1. In Vehicle Scheduling (Tr), select the new record icon; the Vehicle Request Pop-Up Window will appear.
2. **IMPORTANT:** Annotate the trip ticket number.
3. In the “Generate From” field enter in the trip ticket number (precede with an equal sign for quicker search results) and tab out.

OR

1. Enter all required data.
 - a. Select “OK” to submit vehicle request.



Figure 6-34: Schedule Dispatch Icon

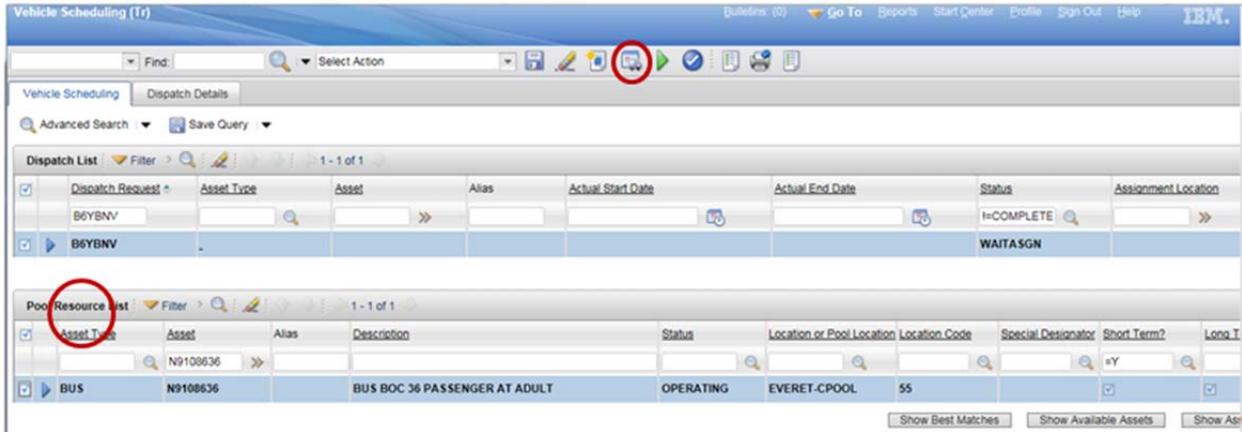


Figure 6-35: Vehicle Scheduling (Tr) Module—Associate a Vehicle with a Request

Associate a Vehicle with a Request:

1. In the “Dispatch List” type in trip ticket number generated from the vehicle request in the “Dispatch Request” field, and then select the magnifying glass to bring up record.
2. In the “Pool Resource List” type in the desired asset and select the magnifying glass to bring up vehicle.
3. Click each box to choose the trip ticket and asset.
4. Select the “Schedule Dispatch” icon – Schedule Dispatch pop-up window will appear.

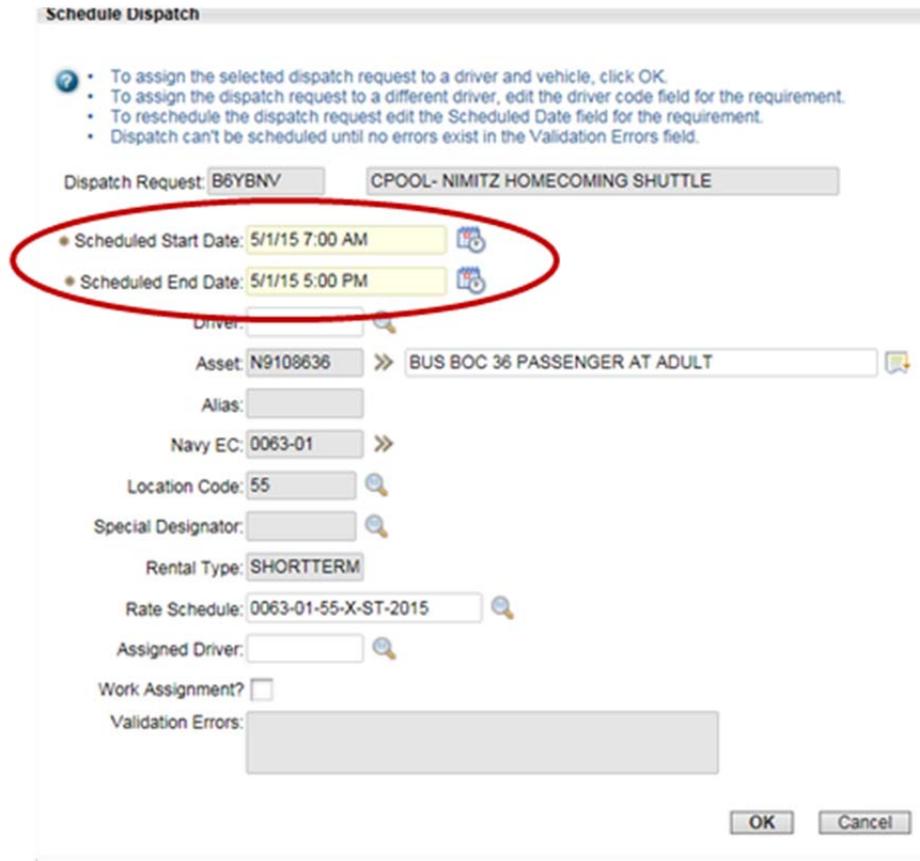


Figure 6-36: Schedule Dispatch Pop-Up Window

5. Enter scheduled start and end date and times.
6. Select “OK” to dispatch trip ticket.

Start the Trip Ticket:



Figure 6-37: Start Dispatch Icon

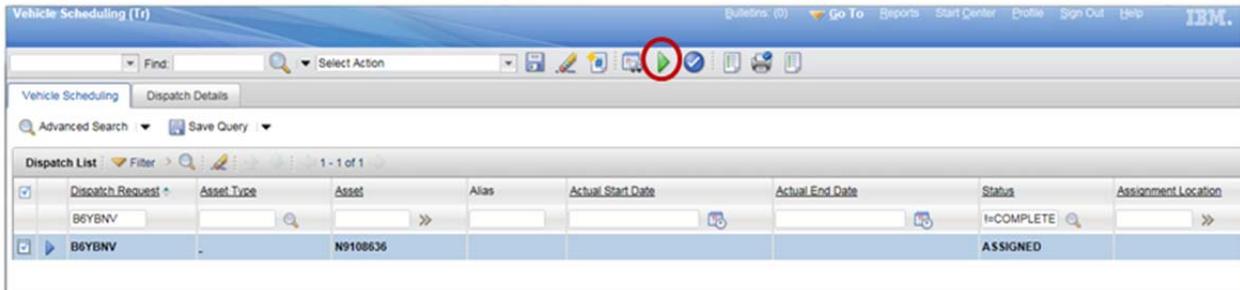


Figure 6-38: Vehicle Scheduling – Start the Trip Ticket

1. In the dispatch list you should see the trip ticket is now associated with the asset on the same line – Check the box.
2. Select the “Start Dispatch” icon – Start Dispatch pop-up window will appear.

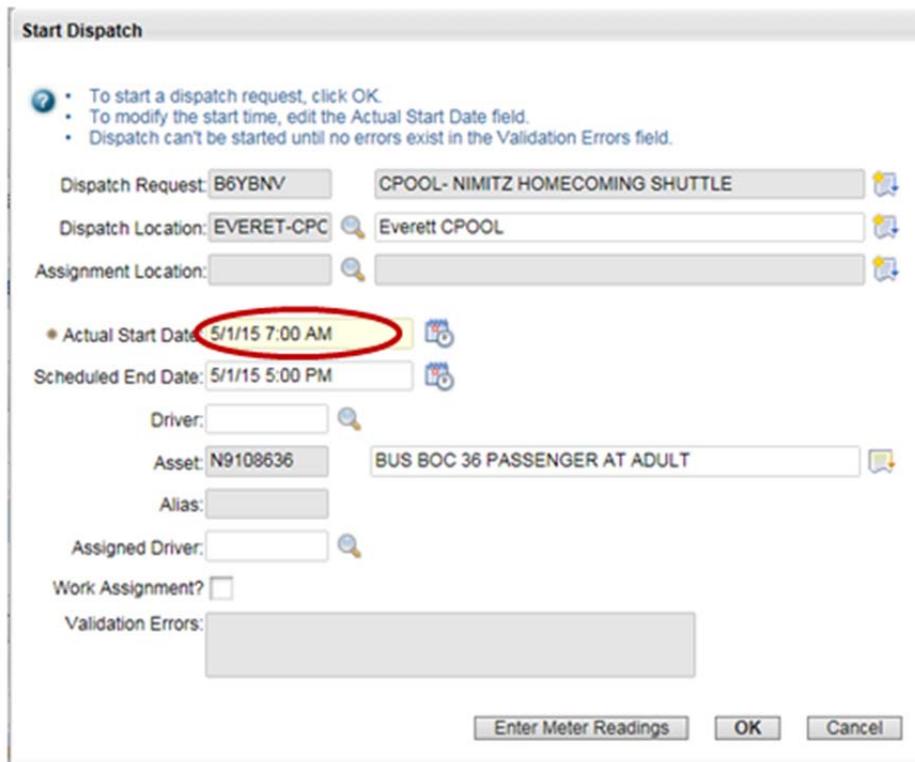


Figure 6-39: Start Dispatch Pop-Up Window

3. Enter “actual start date” ***

4. Select “OK” to start dispatch.

*** If the ticket is back dated, a diamond box with a question mark in the middle will appear in the start date field, click on the question mark and a box will appear with the following notification:(see figure 6-# below for reference), click “yes” to continue or click “no” to adjust the date to a current date.

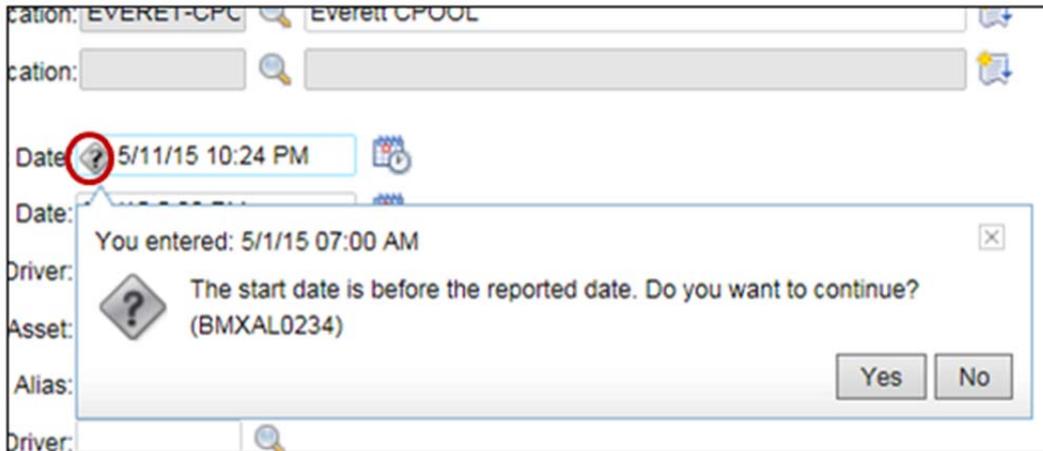


Figure 6-40: Start Dispatch – Back date notification

Complete the Trip Ticket:



Figure 6-41: Complete Dispatch Icon

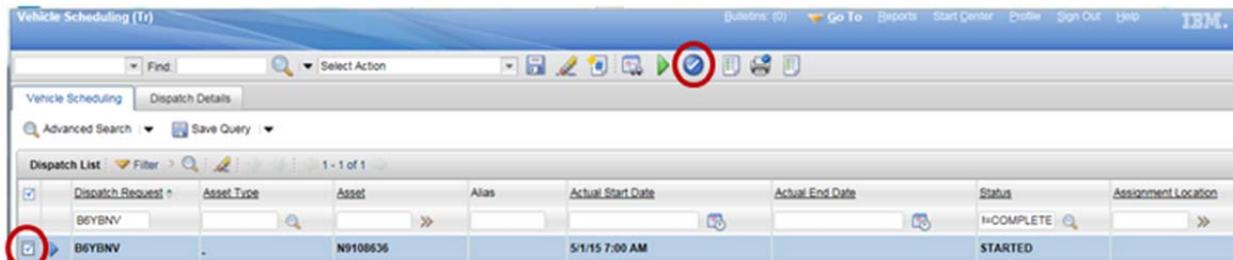


Figure 6-42: Vehicle Scheduling – Complete a Trip Ticket

1. Enter in the desired trip ticket number and click the magnifying to bring up the dispatch record.
2. Check the box to choose the record.
3. Select the “Complete Dispatch” icon – Complete Dispatch pop-up window will appear.

Figure 6-43: Complete a Trip Ticket Pop-Up Window

4. Enter actual end date.
5. Select “Enter Meter Reading” –Enter Meter Readings window will appear.

Meter	New Reading	New Reading Date	Rollover?	Inspector	Meter Type	Previous Reading	Previous Reading Date
ODOMETER	17,468	4/30/15 7:00 AM			CONTINUOUS	17,468	4/30/15 7:00 AM

Figure 6-44: Complete Dispatch – Enter Meter Reading

6. Enter in new reading and reading date (Maximo will not allow a lesser mileage to be entered unless it’s accompanied with an earlier reading date) – Select “OK.”
7. To complete record, select “OK” on the “Complete Dispatch” window.

Review Billing line of a Completed Ticket:

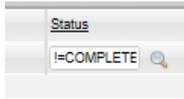


Figure 6-45: Set filter status to !=Complete

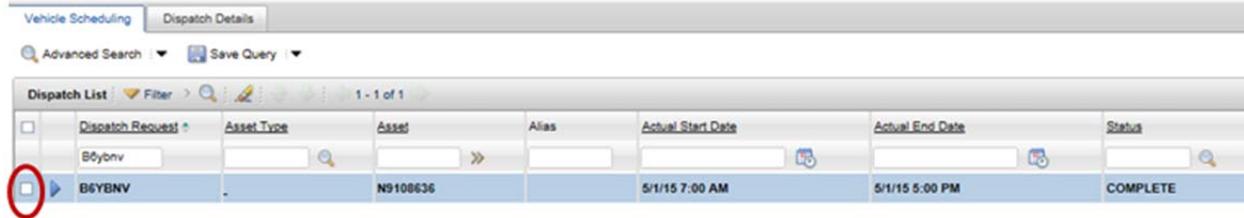


Figure 6-46: Vehicle Scheduling – Review Completed Ticket

1. To review billing line of a completed ticket the “not equals COMPLETE” or “!=COMPLETE” must be removed from the “Status” field.
2. Select record by checking the box in the “dispatch list” and go to the “Dispatch Details” tab.

6.8.5.2 Reviewing, Editing or Correcting a Billing Line in Dispatch Detail Process

To review billing data refer to the “Dispatch Transactions” section located in the Dispatch Details tab. If data is not displayed, then billing lines have not been generated for the trip ticket. If billing lines have been generated, transactions will be grouped in this section.

Dispatch Transactions (located in the Dispatch Details tab):

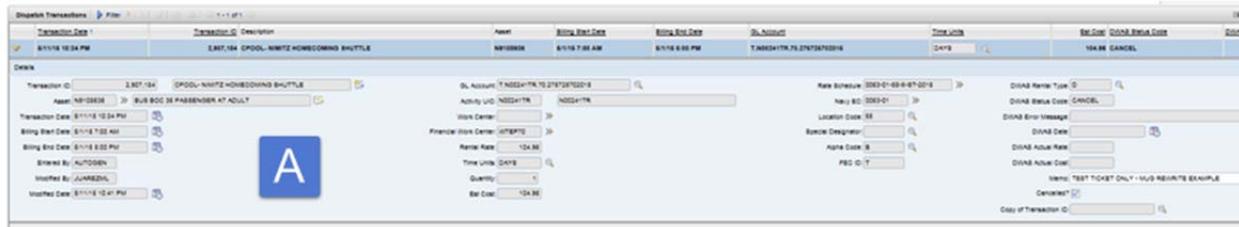


Figure 6-47: Vehicle Scheduling – Dispatch Transactions Section

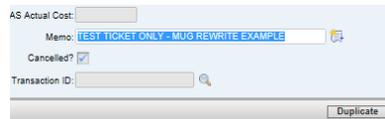


Figure 6-48: Dispatch Transactions Section – Duplicate Function

Section	Title	Description
A Dispatch Transactions Information	Transaction ID	System generated Unique Identifier for Dispatch Transactions
	Description	Auto populates description of the dispatch request.
	Asset	Auto populates asset/vehicle that is assigned to the vehicle request.
	Asset Description	Auto populates asset Short Description (One Line)
	Transaction Date	Auto populates date that the billing transaction was created.
	Billing Start Date	Auto populates date that the current billing period starts.
Billing End Date	Auto populates date that the current billing period ends.	

Section	Title	Description
	Entered By	Auto populates the user who created the transaction. If it is AUTOGEN then Maximo auto generated it via CRON job or during dispatch completion
	Modified By	Auto populates the Person who modified the transaction the last time.
	Modified Date	Auto populates the date time stamp when the record was last modified
	GL Account	Auto populates account used to charge for the line item. The value is copied from PLUSTMPTRANS.CHARGEACCOUNT
	Activity UIC	Auto populates Activity UIC (Component of GL)
	Activity UIC Description	Auto populates Activity UIC (Component of GL) name description
	Work Center	Auto populates person group responsible for the dispatch request. Person groups are set up in the Person Groups application.
	Financial Work Center	Auto populates Financial Work Center. Not to be confused with Performance work center
	Rental Rate	Auto populates Price per unit based on Rate Schedule
	Time Units	Auto populates unit of measure for the time rate, such as days or months based on Rate Schedule
	Quantity	Auto populates Quantity of the charge.
	Est Cost	Auto populates Total line price for the charge.
	Rate Schedule	Auto populates the rate schedule used to calculate the billing rates for this assignment
	Navy EC	Auto populates Navy Equipment Code (EC); It is matched to the Navy EC of the asset to determine the valid rate schedule(s) when dispatching vehicles in vehicle schedule
	Location Code	Auto populates location Code
	Special Designator	Auto populates Special Designator
	Alpha Code	Auto populates Alpha Code
	FEC ID	Auto populates Command ID for the Site
	DWAS Rental Type	Auto populates DWAS Rental Type
	DWAS Status Code	DWAS/Prebill Status. <ul style="list-style-type: none"> • New=Ready for Prebill; • RDY=Ready for DWAS Interface; • ERROR=Prebill Error; • ACC, REJ, SNT=Statuses from DWAS; • CANCEL=Transaction Cancelled by user.
	DWAS Error Message	DWAS Error Message
	DWAS Date	DWAS Interface Date stamp
	DWAS Actual Rate	DWAS Actual Rate
	DWAS Actual Cost	DWAS Actual Cost
	Memo	Free form to capture reason for billing edits/corrections etc...

Section	Title	Description
	Cancelled?	An option available to the user to cancel an existing dispatch transaction from being interfaced to DWAS system. When the option is availed the DWAS Status changes to CANCEL. The cancel option is available for editing only when the DWAS Status is REJ, NEW, RDY or ERROR.
	Duplicate	This function is for a billing line correction. Once the billing line is duplicated, the “Copy of Transaction ID” field should be populated.
	Copy of Transaction ID	Copy a like transaction ID and input into this field. Once populated, some fields will auto populate - fields may be modified to reflect correct data.

Table 6-26: Dispatch Transactions Section Field Descriptions – Dispatch Details Transaction Tab

6.8.5.3 Monthly Billing Schedule Process

- On the 15th of each month, billing lines with status of RDY are processed for mid-month billing*
- On the 25th of each month, billing lines are created for open trip tickets*
- On the 27th of each month, billing lines with a status of RDY are processed for monthly billing and DWAS acknowledgement follows within two to three days*

*Schedule may vary due to holiday or year-end considerations.

6.9 Job Plans (Tr) Module

6.9.1 Module Overview

A job plan is a detailed description of work to be performed on a job. In the BSVE Product Line, a Job Plan is routinely associated with PMs as being the specific line item procedures that comprise the PM procedure. Job Plans can also be created to support other recurring types of work such as corrosion control, brake replacement, auto-body preparation procedures, etc. A job plan typically includes procedural descriptions and lists of estimated materials, items, labor, and tools to be used on the job. A job plan can be thought of as a template available for assignment to work orders.

6.9.2 Business Objective

To standardize BSVE Job Plans and eliminate the need to repeatedly key in repetitive work performed to keep equipment running efficiently.

6.9.3 Critical Success Factors

Critical fields are defined as (1) required to save a record and (2) is important in terms of associating data to equipment records that is essential to report fleet management data and produce metrics. All fields lend value to data management. However, all available fields are not addressed in this section. Every effort should be directed to populate all applicable fields.

6.9.4 Module Application Tabs

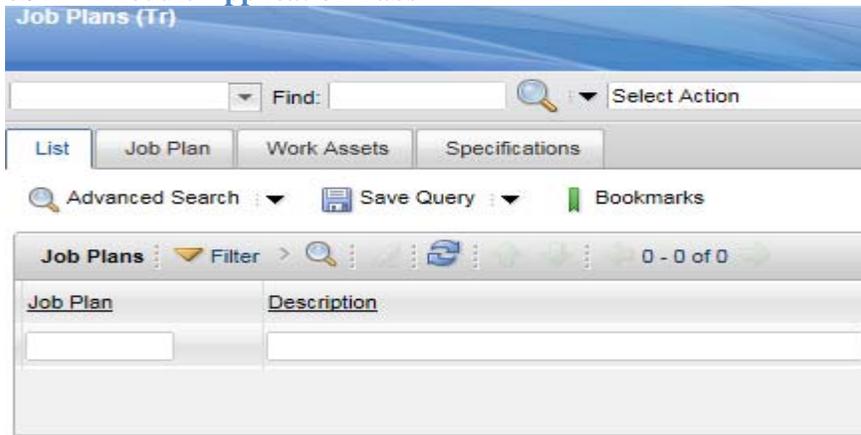


Figure 6-49: Job Plans (Tr)

Tabs	Description
List	Used to search Maximo for job plans
Job Plan	Use to create, view, or modify job plans
Work Assets	Use to add Work Assets to a Job Plan. Not currently being used by BSVE.
Specifications	Use to classify (or reclassify) a job plan and specify attributes to define it further. Not currently being used by BSVE.

Table 6-27: Job Plans (Tr) Tab Descriptions

6.9.5 Job Plans (Tr) Processes

6.9.5.1 Create New Job Plan (Tr)

The following section contains descriptions and screenshots of the Job Plan tab. The screenshots include instructions and descriptions of required information.

Navigate to Job Plan (Tr)

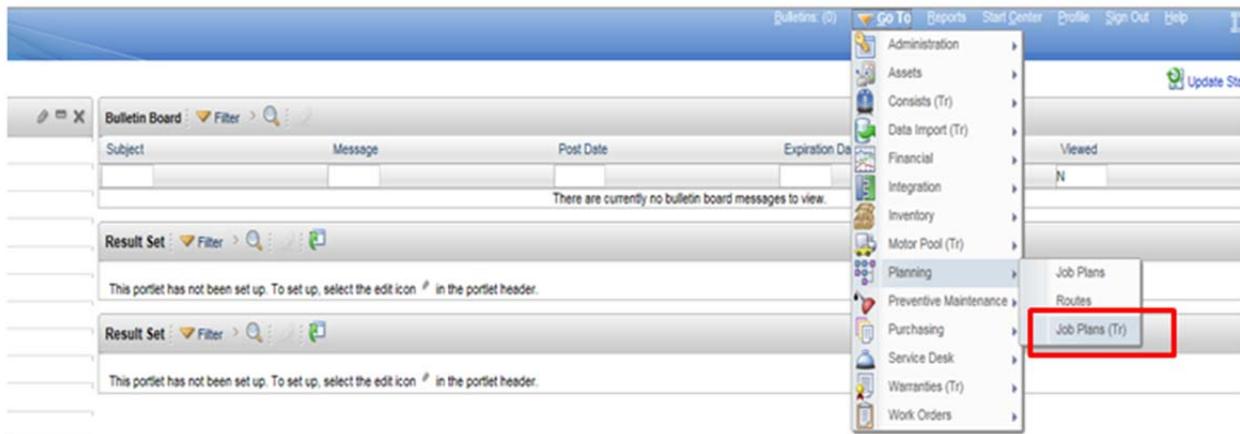


Figure 6-50: From Start Center



Figure 6-51: New Record Icon

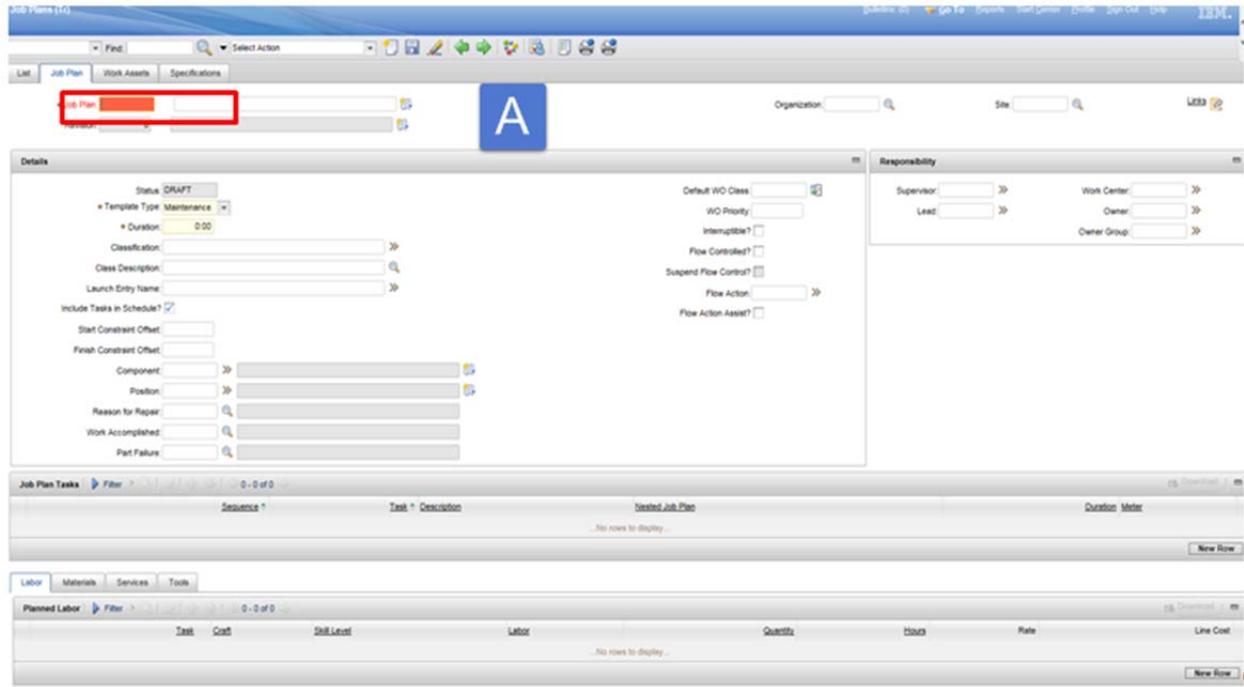


Figure 6-52: Create New Job Plan (Tr) Tab

Section	Title	Description
A <i>Job Plans Tab</i>	Job Plan	Prefix the job plan with the FECs unique naming convention. See below for examples
	Job Plan Description	Describe the purpose of the Job Plan
	Organization	Enter NAVFAC. Must be entered to save the record
	Site	FEC's Site ID. Must be entered to save the record
	Status	Defaults to DRAFT, user will change the status to ACTIVE once the required fields are entered
	Template Type	Auto-populated
	Duration	Is the estimated completion time in hours needed to complete the job
	Classification	Use arrow to select the correct classification code. The Class description will populate once a code is selected.
	Default WO Class	Click on the dialog box, select new row, click on the magnifying glass, select WORKORDER, click ok
	WO Priority	Select a value of 1 through 5. The values relate to the maintenance priority determined by the FEC.
Interruptible	These fields should not be populated. They are not applicable to BSVE business practices.	

	Flow Controlled	These fields should not be populated. They are not applicable to BSVE business practices.
	Suspend Flow Control	These fields should not be populated. They are not applicable to BSVE business practices.
	Flow Action	These fields should not be populated. They are not applicable to BSVE business practices.
	Glow Action Assist	These fields should not be populated. They are not applicable to BSVE business practices.
	Supervisor	Are used at the FEC's discretion
	Crew Lead	Are used at the FEC's discretion
	Work Center	Are used at the FEC's discretion
	Owner	Are used at the FEC's discretion
	Owner Group	Are used at the FEC's discretion

Table 6-28: Field Descriptions on Job Plans

Create a Job Plan:

1. Select the “New Record Icon” to create a Job Plan
2. Complete mandatory fields (As identified in the table above)

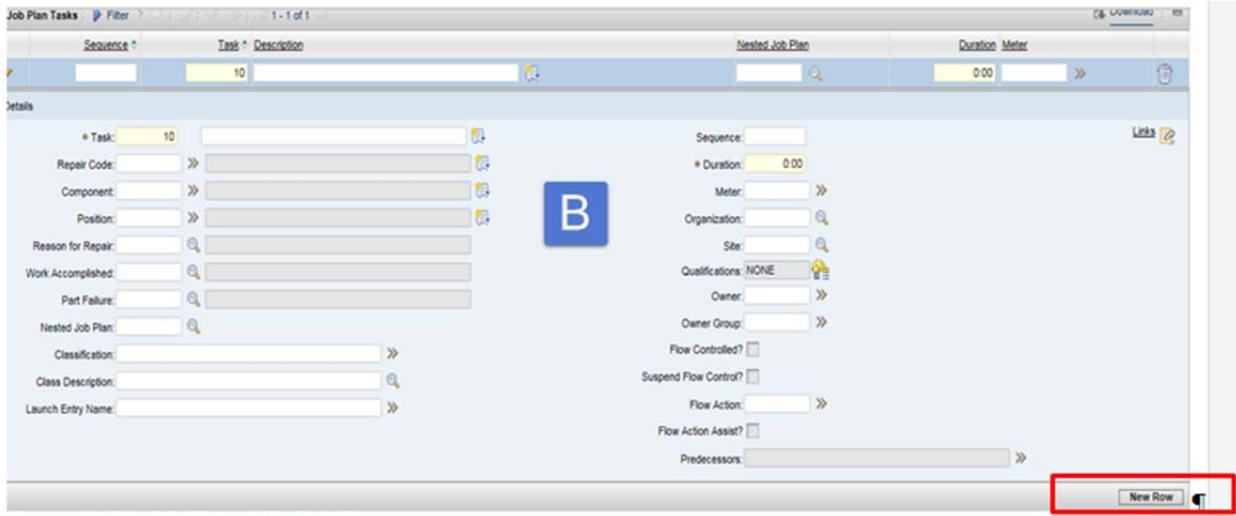


Figure 6-53: Job Plans (Tr) Tab

Section	Title	Description
B Job Plans Tab Job Plan Tasks	Task	Click new row. The task number will auto populate.
	Description	Enter a brief description of the task
	Nested Job Plan	Only used if small job plans are required to complete the task.
	Duration	Self-Explanatory
	Meter	Not used
	All other fields	Are used at the FEC's discretion

Table 6-29: Field Descriptions on Job Plan Tasks

To Enter Task Line

1. Click on New Row and complete the fields in the above table.



Figure 6-54: Job Plans (Tr) Tab

Section?	Section?	Section?
Job Plans Tab	Task	Are used at the FEC's discretion
Labor, Materials, Services, and Tools		

Table 6-30: Table Label?

Job Plan Main Tab

- Job Plan Number – use the naming convention addressed below.
 - Using the naming convention will enable users to query and group BSVE job plans using the Job Plan (Tr) application.
 - Other fields such as the “Classification” will serve to report BSVE specific job plans using the replicated database. However, those fields are not available to query in the advance search tab; thus, they are not beneficial to the person querying job plans via the Job Plans (Tr) application.
- Job Plan Description – use the naming convention addressed below.
- Organization – enter NAVFAC. This value must be entered before the record is saved. Otherwise, the field becomes read only and cannot be populated.
- Site – enter your FEC’s Site ID value. This value must be entered before the record is saved. Otherwise, the field becomes read only and cannot be populated.

Job Plan Main Tab / Details Section

- Status – the status must be changed to reflect the value “Active” once the record is completed. Otherwise, the job plan cannot be associated with a work order.
- Template Type – is required to save a record. It will default to “Maintenance.” DO NOT CHANGE.
- Duration – is required to save the record. Manually total the sum of the specific task lines and enter that value in the field. By doing so, the duration will populated the work order duration field.
- Classification – populate the field with the value “EQUIPMENT” by selecting the “Classify” icon and then selecting the EQUIPMENT value. The Class Description field will also be populated.
- Launch Entry Name and Position fields do not need to be populated.
- Default WO Class should be populated with the value “WORKORDER.”
- WO Priority – this field must be populated with a value of 1 through 5.
 - If the field is not populated with a value of 1 through 5, the job plan cannot be associated with a work order.
 - The values 1 through 5 relate to the maintenance priority.
 - The FEC determines maintenance priority values.

- Interruptible, Flow Controlled, Suspend Flow Control, Flow Action, and Flow Action Assist fields should not be populated.
 - They are not applicable to BSVE business practices.
- Department – populate the field with BSVE
- Supervisor, Crew, Lead, Work Center, Owner and Owner Group are optional fields.
 - These fields can be populated at the FEC’s discretion.

Job Plan Main Tab / Job Plan Tasks Section

- Task description – populate this field with a brief description of the task.
- Duration – enter the estimated time required to complete the task.

All other fields can be populated at the FEC’s discretion.

Job Plan Main Tab / Labor Sub Tab

- Data can be entered in this tab at the FEC’s discretion.
 - If data is entered, the Hours, Quantity, and Craft fields should be populated.

Job Plan Main Tab / Materials/Services/Tools

- Data can be entered in this tab at the FEC’s discretion.

Work Assets Main Tab

- This tab supports the association of assets to job plans.
 - This feature enables safety plans to be associated with specific assets.
 - BSVE has not used this type of functionality to date.

Specifications Main Tab

- This tab supports the association of specification and task specification templates to job plans.

6.9.6 Naming Convention

All Job Plans reside on a shared table. In order to group desired BSVE data via the query function, implementation of a “smart” naming convention was created. All BSVE Job Plans **“WILL”** start with TR and the FEC’s two digit location code. For example, a PWD Jacksonville would start with TR-SE- (smart description, e.g., PM-Light, PM-Heavy, PM-Generators, PM-MHE, etc.).

Non-PM Job Plans should also utilize the smart naming convention. Examples of non-PM Job Plans include brake inspection/replacement, engine overhaul, paint and body work, etc. Using these types of job plans will reduce time to manually enter individual task lines by associating a job plan to the maintenance work order. Also, this will standardize the maintenance procedures by ensuring that individual steps are applied to all applicable work orders. The procedure below is applicable to all non-PM Job Plans. ***Disclaimer "NON-PM Job Plans are not used at every FEC, see SME to validate requirement if applicability is in question"**

- Individual PWDs are encouraged to develop these types of job plans

- Create the job plan in Excel
 - Include individual task descriptions and planned time to complete the task
- Forward that Job Plan to the FEC Core
- The FEC Core will forward that plan to the other PWDs to solicit their input
 - Revise as agreed to by the PWDs
- The final job plan is then entered in Job Plans (Tr) by the FEC CORE.

6.10 Preventive Maintenance (Tr) Module

6.10.1 Module Overview

The PM application provides the ability to create PM schedules to include attaching work oriented job plans that are detailed to each vehicle. In order for a vehicle or piece of equipment to be included on a PM schedule, a PM record must be created for each specific piece of equipment. Creation of a PM record will place the applicable piece of equipment on a predetermined schedule based on frequency (e.g., days, months, or years) and miles or hours. This ensures that the vehicle will post on a PM due report based on time and/or miles/hours identified within the PM record. **There should not be more than one PM record per vehicle.** Multiple Job Plans can be attached to a single PM record associated to a vehicle or piece of equipment, which precludes the need to create multiple PM records for a single piece of equipment. For example, Annual - Job Plan, Semi-Annual - Job Plan, and Periodical or Bi-Annual -Job Plan can be attached to a PM.

6.10.2 Business Objective

The PM application is designed to support a variety of maintenance requirements.

6.10.3 Critical Data Fields

The bullets below represent policy or procedural requirements that should be understood when using the PM application.

1. Properly annotate the requirement in the description
2. Estimated start and end dates
3. Point of contact information: name, phone etc.
4. Necessary funding information

6.10.4 Module Application Tabs

List	PM	Frequency	Seasonal Dates	Job Plan Sequence	PM Hierarchy	Forecast	PM History
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Table 6-31: Preventative Maintenance (Tr) Module Tabs

Tab	Description
PM	Used to schedule and generate preventative maintenance work orders
Frequency	Used to determine how often a PM WO is generated
Seasonal Dates	Use to specify the active day, months, or seasons of a PM
Job Plans Sequence	Used to assign a sequential list of job plans to a PM record
PM Hierarchy	Only used to establish if multiply PMs with parent/child relationship
Forecast	New field currently not being used by BSVE
PM History	Self-Explanatory

Table 6-32: Preventative Maintenance (Tr) Tab Description

6.10.5 Preventative Maintenance (PM) (Tr) Processes

The following section contains descriptions and screenshots of the PM tab. The screenshots and tables throughout include instructions and descriptions of required information.

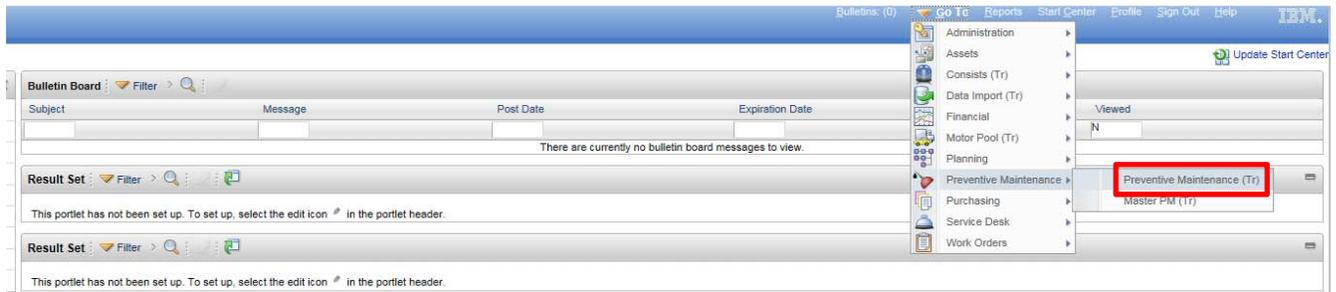


Figure 6-55: From Start Center Preventive Maintenance (Tr)



Figure 6-56: New Record Icon

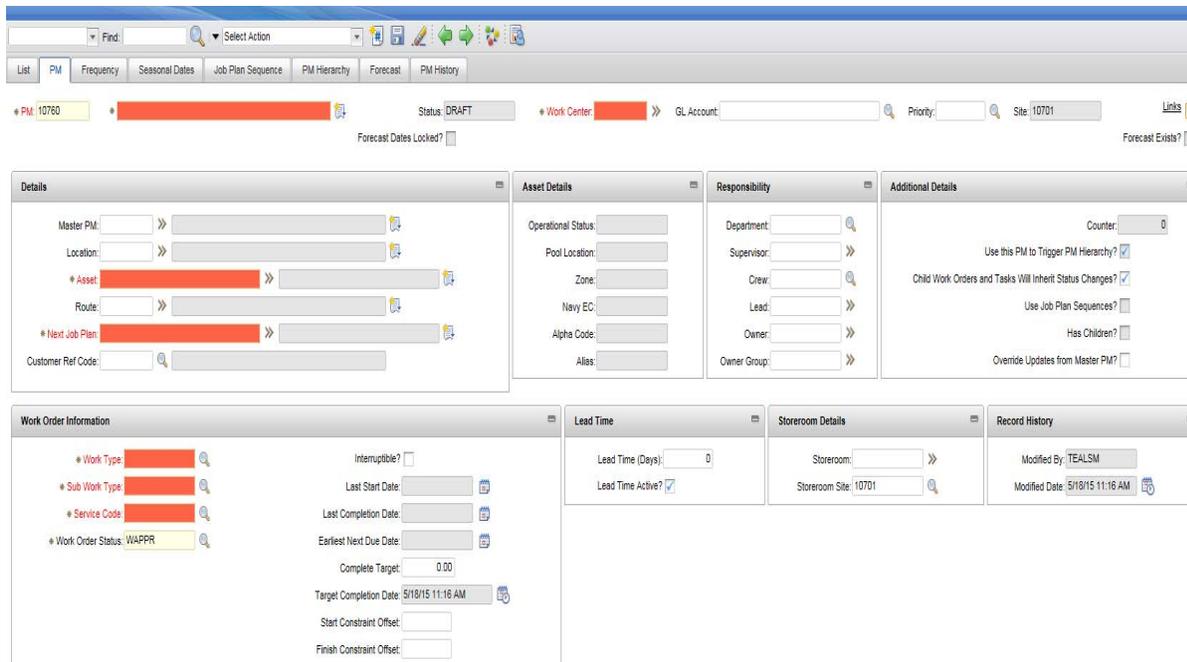


Figure 6-57: Preventive Maintenance (Tr) Create New Record

6.10.5.1 Create the Preventative Maintenance Record

1. In Preventative Maintenance (Tr), select the new record icon; a PM number is automatically generated.
2. **IMPORTANT: Make sure to change the PM number to the standard BSVE naming convention.** Pm Number – prefix the PM number with TR and **FEC** two digit indicator and complete the PM number by adding the equipment number, e.g., TR-SE-N9530071

(TR= transportation, SE= equals the **FEC** in this example is SouthEast, the last digits are identical to the USN number N9530071)

3. PM Plan Description- use the naming convention: PM For Equipment, e.g., PM For N9530071
4. Status- the status must be changed to “ACTIVE” to activate the PM functionality, e.g., PM generation. Once all mandatory fields have been entered.
5. Work Center – required to save a record. Enter the appropriate work center code.

6.10.5.2 *PM Process Success Factors*

The bullets below represent policy or procedural requirements that should be understood when using the PM application.

1. PM Main Tab / Header Section
 - a. PM Number – prefix the PM number with a TR and FEC’s two digit indicator and complete the PM number by adding the equipment number, e.g., TR-SE-N9530071 (TR= transportation, SE=equals the Southeast, the last digits are identical to the USN number N9530071)
 - b. PM Plan Description – use the naming convention: PM For Equipment Number, e.g.,
2. PM For N9530071
 - a. Status – the status must be changed to “Active” to activate the PM functionality, e.g., PM generation.
 - b. Work Center –is required to save a record. Enter the appropriate work center code.
 - c. GL Account – enter the applicable value
 - d. Priority – this field must be populated with a value of 1 through 5.
 - i. The FEC determines maintenance priority values.
 - e. Site – defaults based on the user’s profile.
3. PM Main Tab / Details Section
 - a. Master PM – not used by BSVE
 - b. Location – not used by BSVE
 - c. Asset – populate this field with the applicable asset record.
 - i. The Customer Reference Code will be auto-populated based on the asset selected.
 - d. Route – Update field as per BSVE business rules
 - e. Next Job Plan – use the icon to attach the appropriate job plan to the PM record when the PM record is initially created.
 - i. If multiple job plans are associated with the PM record, the next job plan record will be displayed.
4. PM Main Tab / Asset Details Section
 - a. These fields will auto-populate once the Asset has been selected
5. PM Main Tab / Responsibilities Section
 - a. Department – select BSVE
 - b. Supervisor, Crew, Lead Owner, and Owner group fields are optional
6. PM Main Tab / Additional Details Section
 - a. Counter – use the “Select Action,” “set PM Counter” function to synchronize “Job Plan Sequencing.”
 - i. This function is not needed if a single job plan is associated with the PM.
 - ii. If multiple job plans are associated with the PM, this function provides the ability to resynchronize the job plans if required.
 - b. Use this PM to Trigger PM Hierarchy? and Has Children? Fields – PM hierarchy is a parent child relationship. For example, you could have a PM parent for an annual vehicle

PM. The PM children are 1. Rotate tires, 2. Change oil, 3. Annual inspection, etc. It is a way to group PMs so they happen at the same time. It does allow you have different GL accounts.

- c. This functionality is not applicable to BSVE business practices.
 - d. Child Work Orders and tasks Will Inherit Status Changes – always check this field.
 - e. Use Job Plan Sequences? – this field is auto-populated if multiple job plans are associated with the PM record.
 - f. Override Updates from Master PM? – this box should not be checked.
 - i. BSVE does not create Master PM records.
7. PM Main Tab / Work Order Information Section
- a. Work Type – required to save a record. The value “BSVE_MAINT” should always be selected.
 - b. Sub Work Type – required to save a record. The value “PM” should always be selected.
 - c. Service Code – required to save a record. Select the appropriate value based on the equipment type.
 - d. Work Order Status – required to save a record. The value “WAPPR” should always be selected.
 - e. Interruptible? – should not be populated.
 - f. Last Start Date, Last Completion Date, and Earliest Due Date fields are auto-populated based on the previous PM.
 - g. Complete Target optional field.
 - h. Target Completion Date will auto-populate.
 - i. Start and Finish Constraint Offset, are not currently used in BSVE.
8. PM Main Tab / Work Order Information Section
- a. Lead Time (Days) – optional field. If a lead time is desired to generate the PM record, populate this field with the desired lead time in days.
 - b. Lead Time Active? – populate this field to toggle lead time functionality on and off.
 - c. Storeroom and Storeroom Site fields are not applicable to BSVE business practices. They should not be populated.
9. PM Main Tab / PM Relationships Section
- a. This section provides functionality to create PM relationships associated to various components on a single asset. For example, a refer truck is PM’ed and while the truck is in the shop, the refer unit is also PM’ed. The truck and refer unit would have two separate PM records. Both PMs could be completed while the truck is in the shop.

Frequency Main Tab / Life Span Section

- Start date – enter the date that the PM should be completed when the PM record is created.
 - That date will be used to forecast the first PM due date. Frequency criteria will be used to calculate subsequent due dates.
- Stop Date – Always leave blank. (Specifies the last date that this PM can have a PM work order generated)

Frequency Main Tab / Work Order Generation Information

- Use Last WO’s Start Information to Calculate Next Due Frequency? – the bullets below describe basic guidelines used to determine if this box should be checked. The FEC will make this determination based on the maintenance practices.
 - Check the box if:

- The vehicle should receive a PM during the same period every year. For example:
 - Smog testing – a state requirement that has an expiration date.
 - Level loading of maintenance requirements.
 - Do not check this box if:
 - The vehicle should receive the next PM based on the manufacturer’s time-based specifications.
 - Maximize work force efficiency and reduce costs by not over maintaining vehicles.
 - Generate WO based on Meter Reading (do not estimate)? - **Important:** If checked, the due date will be estimated (calculated) based on previous meter readings. Based on those readings (number of miles accrued within the meter reading timeframes) the projected due date is calculated. By not checking that box, the actual meter reading will trigger the PM due date based on actual miles accrued from the previous PM.
 - Generate WO When Meter Frequency is Reached? – Do **NOT** check this field. If checked, it will auto generate a PM work order once the frequency is met.

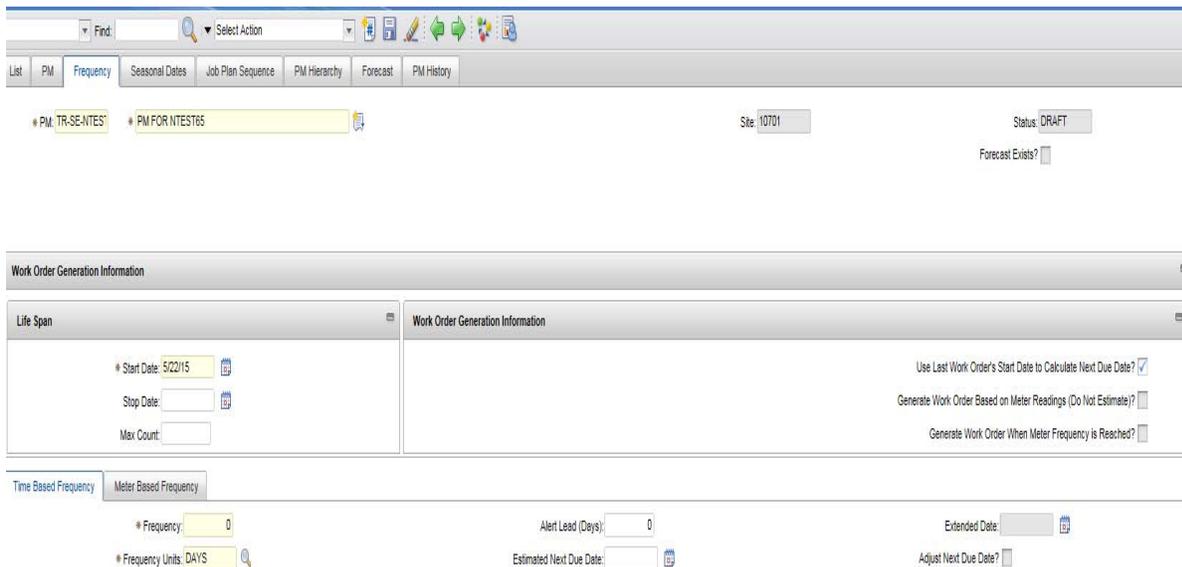


Figure 6-58: Preventive Maintenance (Tr) Frequency Tab

6.10.5.3 Frequency Main Tab / Time Based Frequency Sub Tab

Populate data in this section to create a time-base PM frequency. Most BSVE assets should have this data populated.

- Frequency – is required to save a record. Enter the value that will calculate the appropriate duration between PMs based on this value multiplied by the Frequency Units value.
- Frequency Units – required to save a record. Enter the value that will calculate the appropriate duration between PMs based on the Frequency value multiplied by this value.
- Alert Lead (Days) – enter a value to generate an alert based on days until the PM is due.
- Estimated Next Due Date – this field is auto-populated based on the frequency data.
- Extended Date – If Extended Date supplied it overrides Next Due Date.
- Adjust Next Due Date – Adjust the next due date after generation?

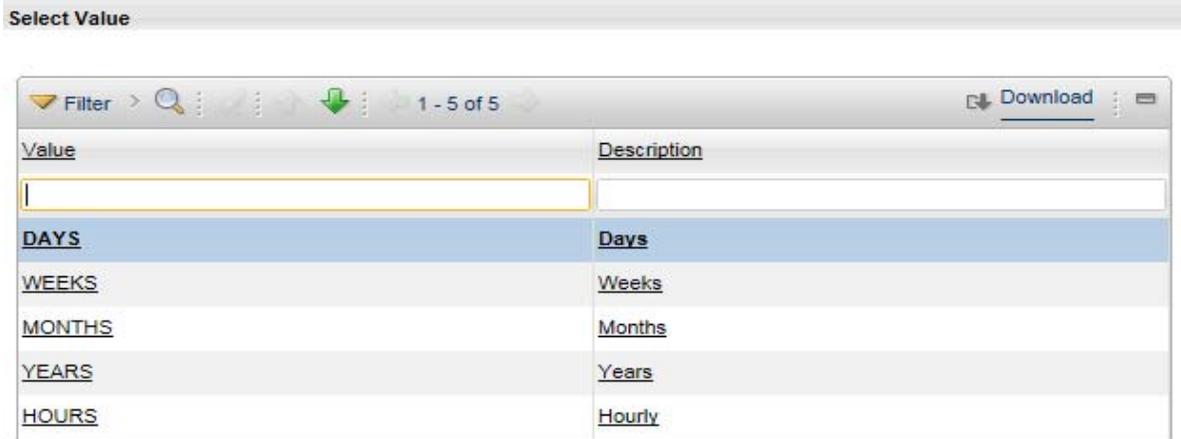


Figure 6-59: Preventive Maintenance (Tr) Time Based Frequency Sub Tab

6.10.5.4 Frequency Main Tab / Meter Based Sub Tab

Populate data in this section to create a meter-base PM frequency. Most BSVE assets should have this data and the time-based frequency data populated.

- Meter – required to save a record.
 - Select the appropriate meter type, i.e., odometer-miles, odometer-kilometers, odometer-hours.
 - The asset must have a meter created/associated with the asset to use this function.
- Frequency – is required to save a record. Enter the value that will serve as the limit between PMs.
- Other fields are auto-populated or optional.



Figure 6-60: Preventive Maintenance (Tr) Meter Based Frequency Tab

6.10.5.5 Seasonal Dates Main Tab

Enter data so as to generate PMs during specific seasonal dates. An example is snow removal equipment. That equipment should receive preventive maintenance prior to the winter season. It should not receive a PM during the summer months.

Figure 6-61: Preventive Maintenance (Tr) Seasonal Dates Tab

6.10.5.6 Job Sequence Main Tab

Enter data in this tab to sequence two or more job plans associated to a single PM record. Multiple Job Plans can be attached to a single PM record associated to a vehicle or piece of equipment, which precludes the need to create multiple PM records for a single piece of equipment.

Figure 6-62: Preventive Maintenance (Tr) Job Per Sequence Tab

6.10.5.7 History Tab-Explanatory

Date Due	Date Created	Date Completed	Due at Meter	Meter at Creation	Meter at Completion	Meter	Work Order
6/19/12	6/20/11	6/27/11					B22023
1/8/16	1/8/14	1/8/14					BCP4G4
1/8/16	1/8/14	1/8/14					BCP4G6
1/8/16	1/8/14	1/8/14					BCP4G7
1/8/16	1/8/14	1/8/14					BCP4G9
1/8/16	1/8/14	1/8/14					BCP4GB
1/8/16	1/8/14	1/8/14					BCP4GC
1/8/16	1/8/14	1/8/14					BCP4GD
1/8/16	1/8/14	1/14/14					BCP4FT
1/8/16	1/8/14	1/14/14					BCP4FV

Figure 6-63: Preventive Maintenance (Tr) History Tab

6.11 Work Order Tracking (Tr) Module

6.11.1 Module Overview

Maintenance Work Orders are used to administer work to be performed on vehicles and equipment. Work orders also serve as the record that captures the specific type of maintenance performed to include the maintenance procedures accomplished on vehicles/equipment during a specified period. It is also used to capture labor only.

6.11.2 Critical Success Factors

Critical Success Factors are defined as (1) required to save a record and (2) is important in terms of associating data to equipment records that is essential to report fleet management data and produce metrics. All fields lend value to data management. However, all available fields are not addressed in this section and the next section Non-Critical Success Factors. Every effort should be directed to populate all applicable fields.

6.11.3 Module Application Tabs

Figure 6-64: Work Order Tracking (Tr)

Tabs	Description
List	Used to search Maximo for job plans
Work Order	Use to create, view, or modify job plans
Plans	Use to add Work Assets to a Job Plan. Not currently being used by BSVE.
Actuals	Use to classify (or reclassify) a job plan and specify attributes to define it further. Not currently being used by BSVE.
Axle Configuration	Currently not used to support BSVE business practices.
Related Records	Currently not used to support BSVE business practices.

Tabs	Description
Safety Plan	Self-Explanatory
Log	Currently not used to support BSVE business practices.
Failure Reporting	Currently not used to support BSVE business practices.
Specifications	Currently not used to support BSVE business practices.

Table 6-33: Work Order (Tr) Field Description - Tabs

6.11.4 Work Order Processes

6.11.4.1 Creating a Work Order

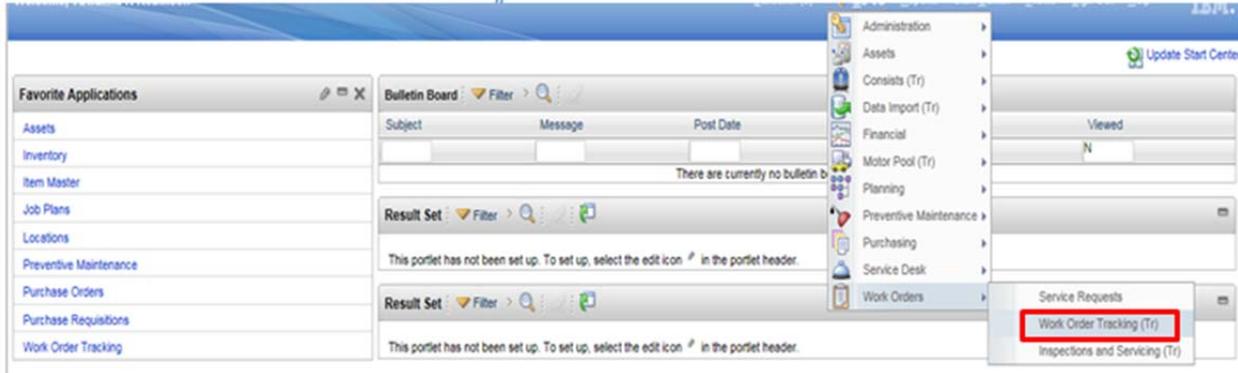


Figure 6-65: From Start Center Work Order (Tr)

6.11.5 Creating a New Work Order (Tr)

The following section contains descriptions and screenshots of the Job Plan tab. The screenshots include instructions and descriptions of required information.

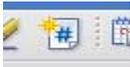


Figure 6-66: New Record Icon

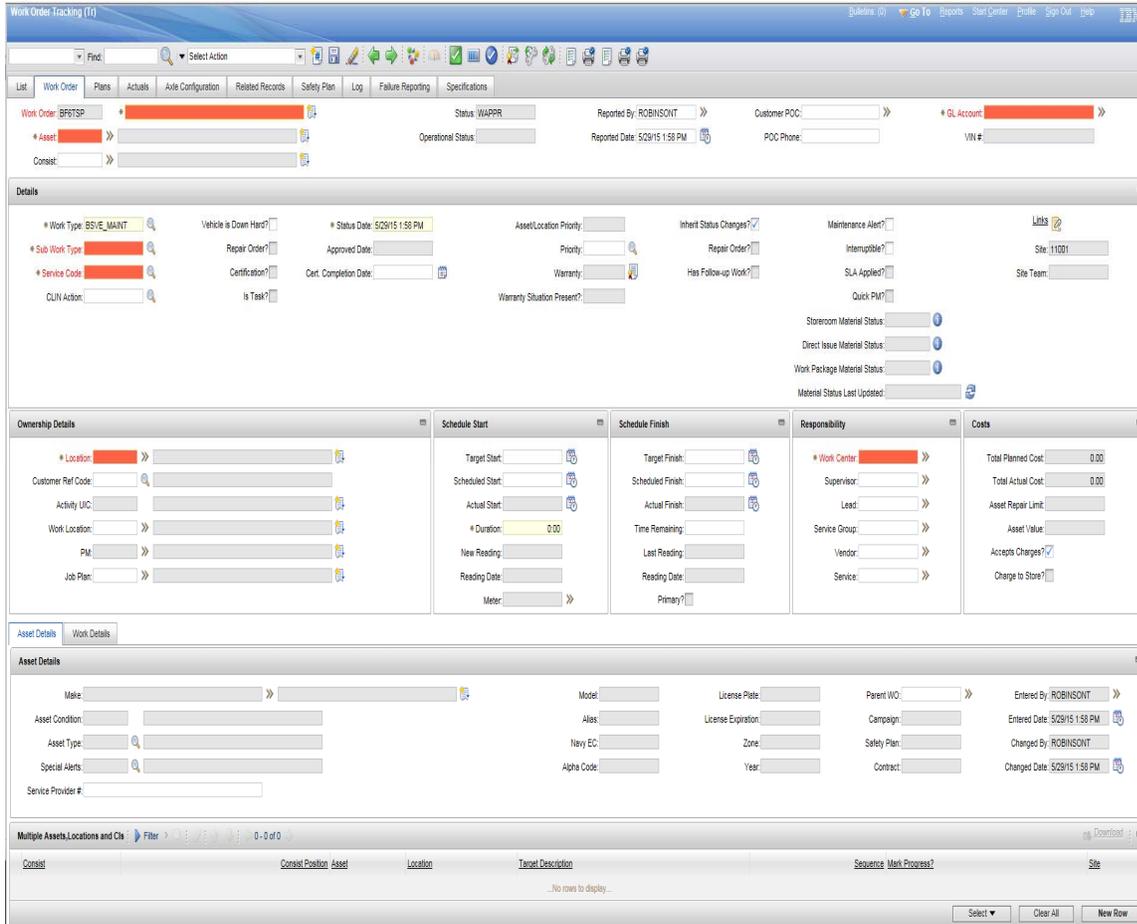


Figure 6-67: Work Order Tracking (Tr) Create New Record

Creating a New Work Order (Tr):

- Equipment – is required to save a record. The **“ONLY”** exception is for labor only Work Orders.
 - Enter the equipment (USN) number.
- Work Order Description – required to save a record. Enter a concise statement describing the maintenance associated with the work order.
- Status – work order status is addressed below.
 - Only those codes should be used on any BSVE maintenance work order.
- Customer POC – enter the POC relative to the vehicle assignment.
- POC Phone – enter the POC’s telephone number.
- GL Account – will default based on EC application (JON Tab)
 - GL Accounts will default from the Equipment application for customer-owned equipment
 - Certain GL Accounts for PWD owned equipment will not default. Refer to the Work Type, Sub Work Type and Service Code hierarchy described below.

Work Order Main Tab / Details Section

- Work Type – required to save a record.
 - Work Type, Sub Work Type and Service Code Serve the purpose to enable Fleet Managers to group work execution based on this hierarchy.

- This supports metric reporting.
- Top level of maintenance types (hierarchy).
 - Always select BSVE_MAINT
- Sub Work Type – required to save a record.
 - Second level of maintenance types (hierarchy).
 - Abuse – determined to be beyond normal wear and tear.
 - The customer’s GL Account (normally acquired from the trip ticket) is used on the maintenance work order to charge the customer for the cost of repairs.
 - Accident – is considered to be beyond normal wear and tear.
 - The customer’s GL Account (normally acquired from the trip ticket) is used on the maintenance work order to charge the customer for the cost of repairs.
 - Certification – the 4-million JON will default based on this selection.
 - Used to capture maintenance costs associated with certification of a vehicle/equipment.
 - PM – preventive maintenance.
 - **IMPORTANT:** never generate a PM work order from the Work Order (Tr) application for vehicles that have PM records in the PM application.
 - PM work orders must be generated from the PM application in order to update the PM schedule (updates the schedule to forecast the next PM due date)
 - PM work orders should only be generated from the Work Order (Tr) application for vehicles that are not included in the PM application, e.g., customer-owned equipment that needs a onetime PM, etc.
 - Pre-service – the 4-million JON will default based on this selection.
 - Used to capture maintenance costs associated with pre-service of a vehicle/equipment.
 - Special Moneys – used to capture work that is funded with money specifically designated for a specific type of work. Examples include:
 - Fabrication of a component that is not part of the vehicle’s original design.
 - Same as above, but incorporated on a customer-owned vehicle and the customer requests that the effort is funded through a separate JON for cost visibility purposes.
 - Third level of maintenance types (hierarchy).
 - There are different Service Codes available for selection based on the Sub Work Type selected. The bullets below define each service code as it relates to the sub work type.
 - Abuse (sub work type)
 - Com Lease – commercially leased vehicles (always use the customer’s JON).
 - Customer EQ – customer-owned equipment (always use the customer’s JON).
 - GSA EQ – GSA vehicles (always use the customer’s JON).
 - PWD EQ – PWD-owned vehicles (always use the customer’s JON).
 - Accident (sub work type)
 - Com Lease – commercially leased vehicles (always use the customer’s JON).

- Customer EQ – customer-owned equipment (always use the customer’s JON).
- GSA EQ – GSA vehicles (always use the customer’s JON).
- PWD EQ – PWD-owned vehicles (always use the customer’s JON).
- Certification (sub work type)
 - Full Test
 - 4-million JON will default based on this selection.
 - Used for annual certifications.
 - Rigging Gear
 - 4-million JON will default based on this selection.
 - Used for rigging gear inspections.
 - Selective Test
 - 4-million JON will default based on this selection.
 - Used for interim certifications.
- Field Breakdown (sub work type)
 - Abuse – always use the customer’s JON.
 - Accident – always use the customer’s JON.
 - Repair – 4-million JON will default based on this selection.
 - Tire – 4-million JON will default based on this selection.
 - Won’t Start – 4-million JON will default based on this selection.
- General Maintenance (sub work type)
 - Customer EQ – Customer-owned equipment.
 - The Customer JON field should be populated in the Equipment Application with the customer’s maintenance JON. That JON will default to the maintenance work order.
 - Facility Support – applicable to CAT II and III cranes.
 - GSA EQ
 - Select if a GSA (PWD owned) vehicle is applicable
 - Dry Rate
 - FEC Europe/SW Asia has a dry GSA rate.
 - The standard 4-million JON will default.
 - Wet Rate
 - A JON specific to GSA vehicle maintenance will default.
 - This provides the ability to capture all internal maintenance costs applicable to GSA vehicles.
 - Those internal costs can be compared to the actual revenue received from GSA for providing maintenance services on GSA vehicles.
 - It is desired to have lesser internal cost compared revenue received by GSA for maintenance services rendered.
 - PWD EQ – 4-million JON will default based on this selection.
- PM (sub work type)

PM work orders should only be generated from the Work Order (Tr) application for vehicles that are not included in the PM application, e.g., customer-owned equipment that needs a onetime PM, etc.

 - Customer EQ – Customer-owned equipment.
 - The Customer JON field should be populated with the customer’s maintenance JON. That JON will default to the maintenance work order.
 - FAC CAT III – Facility Category III Cranes

- Typically customer-owned.
 - The Customer JON field should be populated with the customer's maintenance JON. That JON will default to the maintenance work order.
- FAC Elevator – not used.
 - Applicable to FEC Midlant – they maintain/certify facility elevators.
- FAC Emg Gen – facility emergency generators
 - Customer-owned equipment (reimbursable)
 - The Customer JON field should be populated with the customer's maintenance JON. That JON will default to the maintenance work order.
- GSA EQ
 - Select if a GSA (PWD owned) vehicle is applicable
 - Dry Rate
 - FEC Europe/SW Asia has a dry GSA rate.
 - The standard 4-million JON will default.
 - Wet Rate
 - A JON specific to GSA vehicle maintenance will default.
 - This provides the ability to capture all internal maintenance costs applicable to GSA vehicles.
 - Those internal costs can be compared to the actual revenue received from GSA for providing maintenance services on GSA vehicles.
 - It is desired to have lesser internal cost compared revenue received by GSA for maintenance services rendered.
- PWD EQ – 4-million JON will default based on this selection.
- Pre-service (sub work type)
 - Customer Eq – Customer-owned equipment.
 - The Customer JON field should be populated with the customer's maintenance JON. That JON will default to the maintenance work order.
 - GSA EQ
 - Select if a GSA (PWD owned) vehicle is applicable
 - Dry Rate
 - FEC Europe/SW Asia has a dry GSA rate.
 - The standard 4-million JON will default.
 - Wet Rate – not applicable to FEC Europe/SW Asia – provided as information only.
 - A JON specific to GSA vehicle maintenance will default.
 - This provides the ability to capture all internal maintenance costs applicable to GSA vehicles.
 - Those internal costs can be compared to the actual revenue received from GSA for providing maintenance services on GSA vehicles.
 - It is desired to have lesser internal cost compared revenue received by GSA for maintenance services rendered.
 - PWD EQ – 4-million JON will default based on this selection.

- Special Moneys (sub work type)
 - Com Lease – Commercial lease
 - GL Account must be entered – will not default.
 - Customer EQ – Customer Equipment
 - GL Account must be entered – will not default.
 - Fabrication
 - GL Account must be entered – will not default.
 - PWD EQ– PWD owned equipment
 - GL Account must be entered – will not default.
- CLIN Action – values associated with this field are defined by the FEC and serve to capture data relevant to applicable contracts.
- Vehicle is Down Hard? – refer to the Down Hard Box in the following section that defines when this field should be checked.
- Repair Order? – Defaults as checked from an external outside repair order on an invoice associated with a Purchase Request/Order.
- Certification? – Defaults from the asset record.
- Cert. Completion Date – if the equipment requires certification, the last certification date should be entered.
- Priority – the following values should be associated with the maintenance priority based on the vehicle’s end-use. The FEC determines which value should be associated with the maintenance record.
 - 5 – Urgent (mission critical)
 - 4 – Very High (supports essential services)
 - 3 – High (vehicle is required to accomplish work)
 - 2 – Medium (work is adversely impacted if the vehicle is not available, but can be accomplished via alternatives at a productivity cost)
 - 1 – Low (work is adversely impacted if the vehicle is not available, but can be accomplished via alternatives at a lesser productivity cost)
- Inherit Status Change – Always check this field.
- Maintenance Alert? – Defaults upon creation and can be rechecked to view open work orders and associated PMs upon save.
- Interruptible? – do not populate this field.

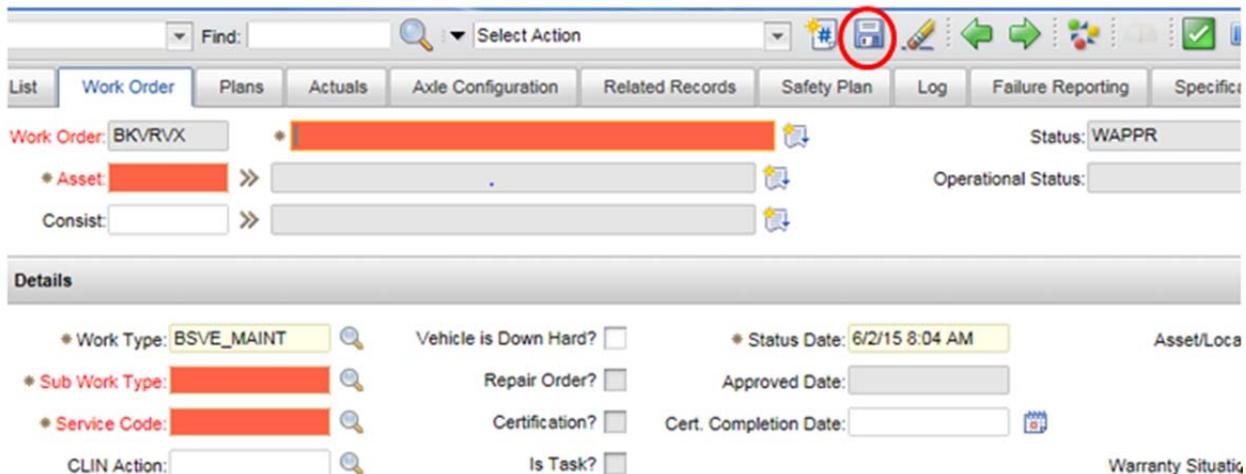


Figure 6-68: Work Order Tracking (Tr) Main Tab

Work Order Main Tab / Ownership Details Section

- Activity UIC – is auto-populated based on the GL Account selected.
- Work Location – populate the value applicable to the shop performing the maintenance.
- Job Plan – use the icon to attach an appropriate job plan, if applicable, to the maintenance being performed.
- Target Start / Target Finish fields – the FEC will determine if populating these fields will provide value.
- Scheduled Start / Scheduled Finish fields – the FEC will determine if populating these fields will provide value.
- Actual Start and Actual Finish – these fields **MUST** be updated by using the change status function.
- Duration – is required to save a record. The estimated duration can be entered.
- New Reading – The primary meter reading.
- Reading Date – The date of the new primary meter reading.
- Time Remaining – Number of remaining hours needed to complete the work. Maximo calculates the value from the Duration - number of hours worked so far. You can modify this value until the work order is closed.
- Last Reading – the most current mileage defaults.
 - **IMPORTANT** – use the “Enter Meter Reading” function via the select action dropdown menu update the meter reading prior to changing the work order status to “Complete.”
 - If a meter is not associated with an asset, the asset record should be updated to include a meter.
- Most pieces of equipment have some type of meter with exception to trailers.
- Reading Date – the date associated with the most current meter reading defaults.
- Primary? – **IMPORTANT** – if this field is not checked, meter data will not default to or populate the “Last Reading” field when the “Enter Meter Reading” function is utilized via the select action menu.
- Work Center – is required to save a record. Enter the assigned work center.
- Accepts Changes – Check box specifies whether or not the work order accepts charges. If the check box is selected (the default), the work order accepts charges. If the check box is cleared, the work order does not accept charges, and you cannot enter charges on the work order.

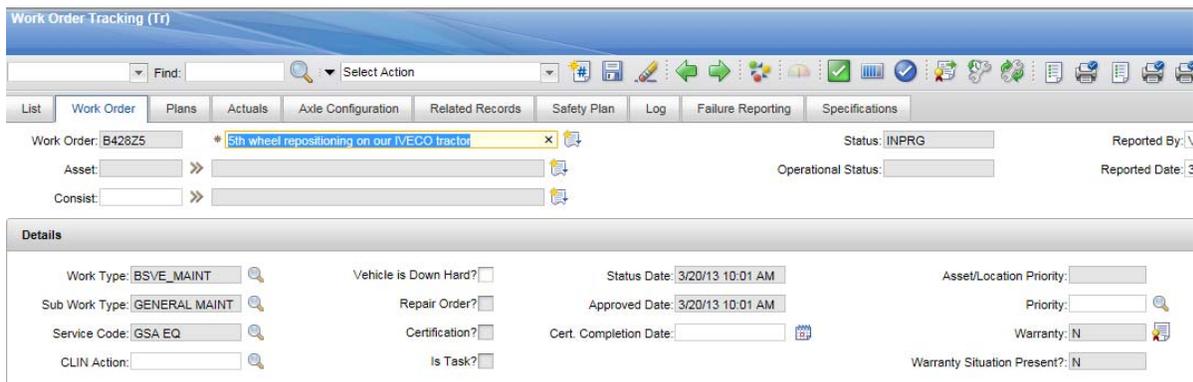


Figure 6-69: Work Order Tracking (Tr) Details Section

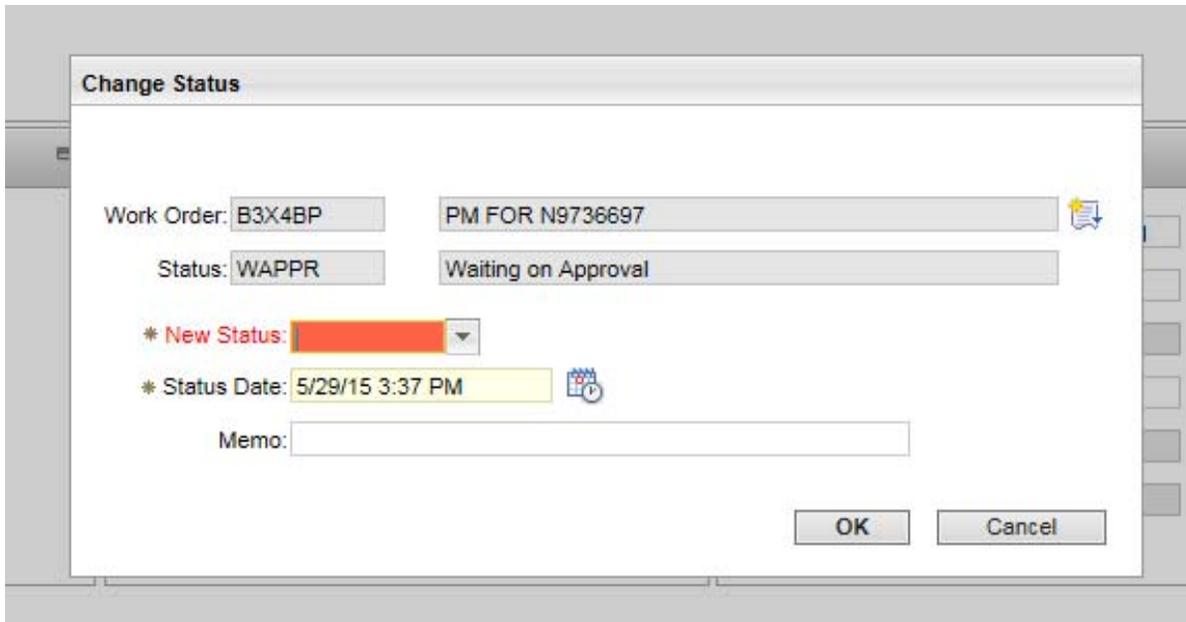


Figure 6-70: Work Order Tracking (Tr) Change Status

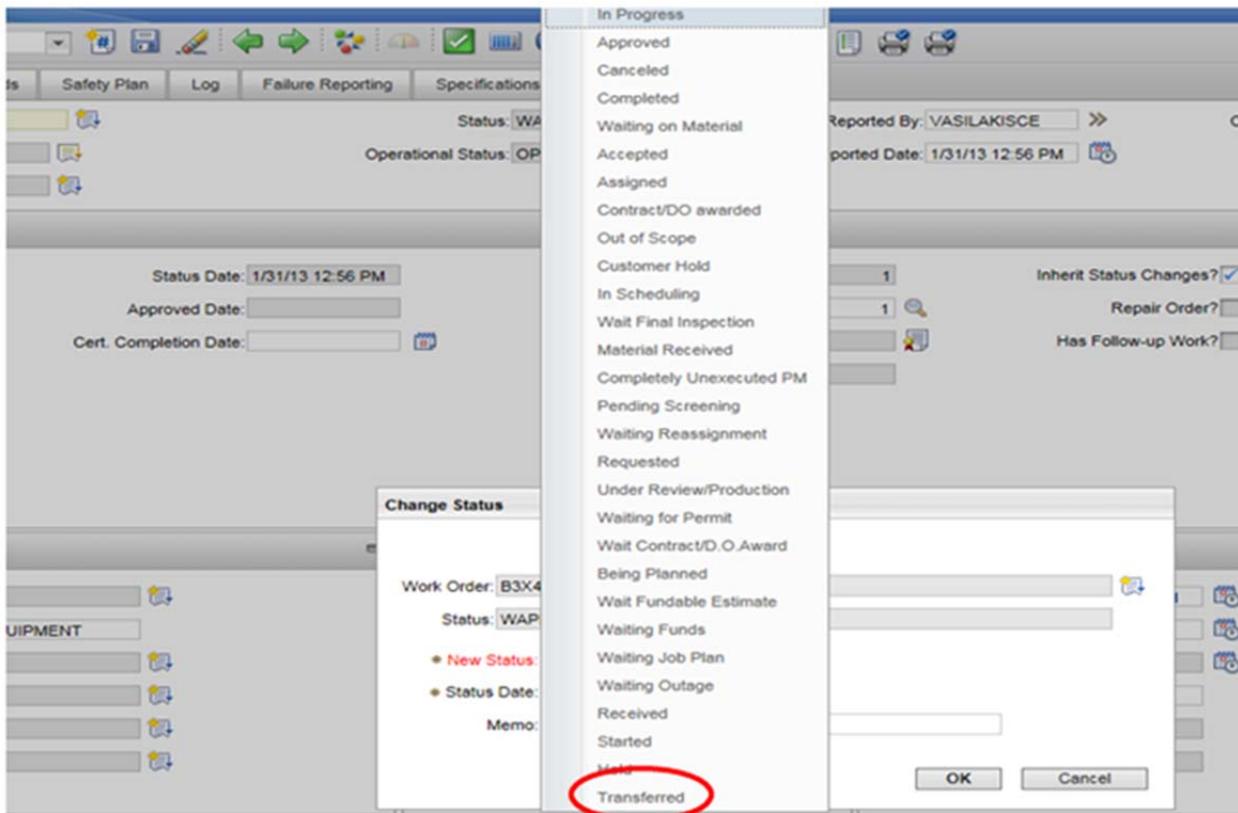


Figure 6-71: Work Order Tracking (Tr) Change Status (In progress)

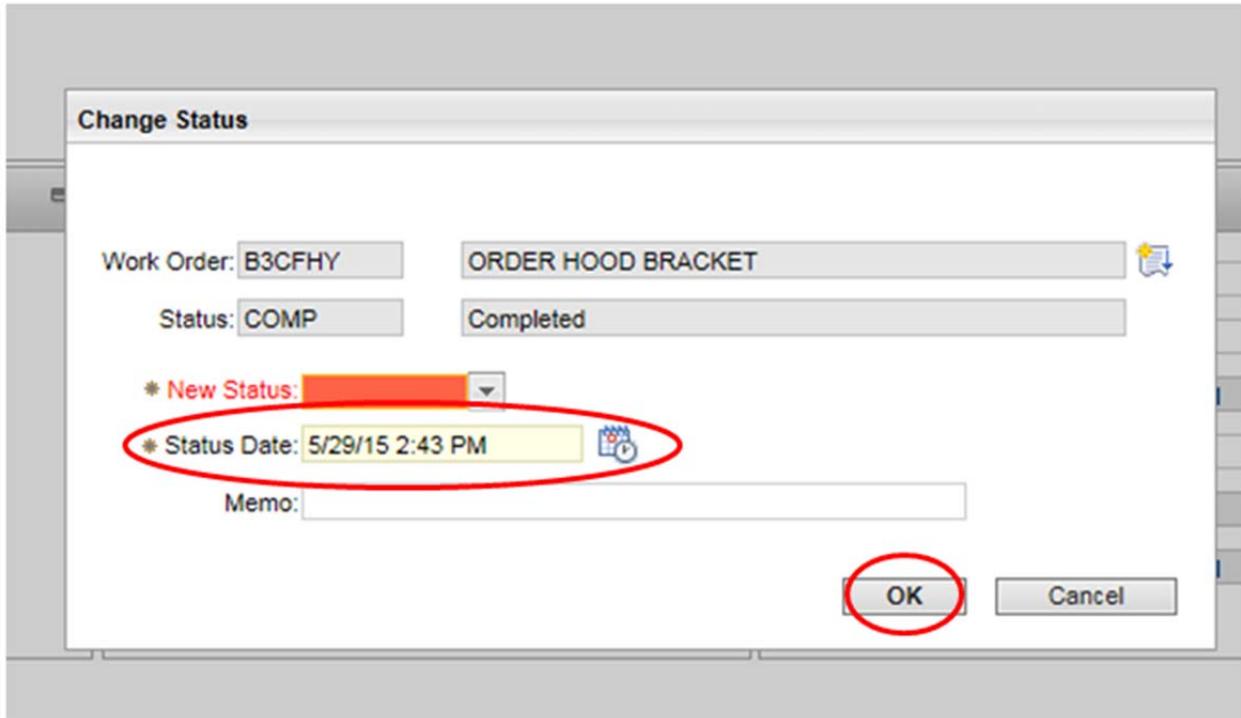


Figure 6-72: Work Order Tracking (Tr) Change Start Date

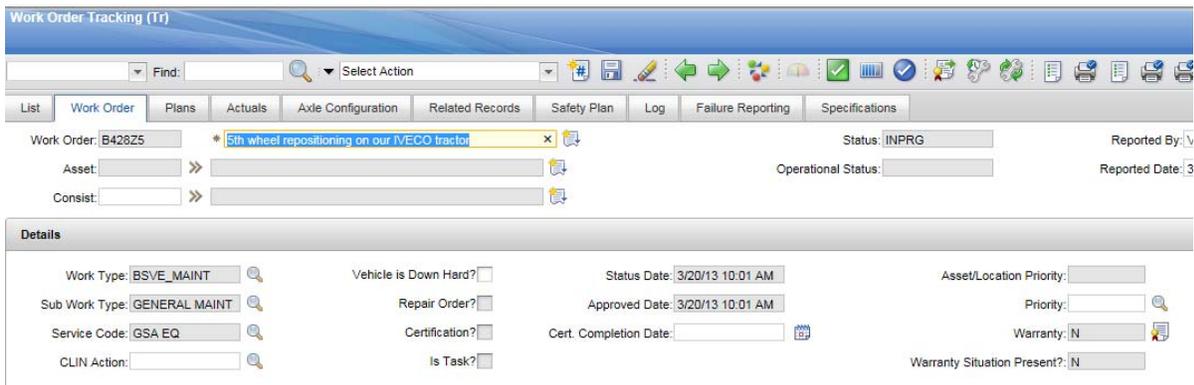


Figure 6-73: Work Order Tracking (Tr) – In Progress

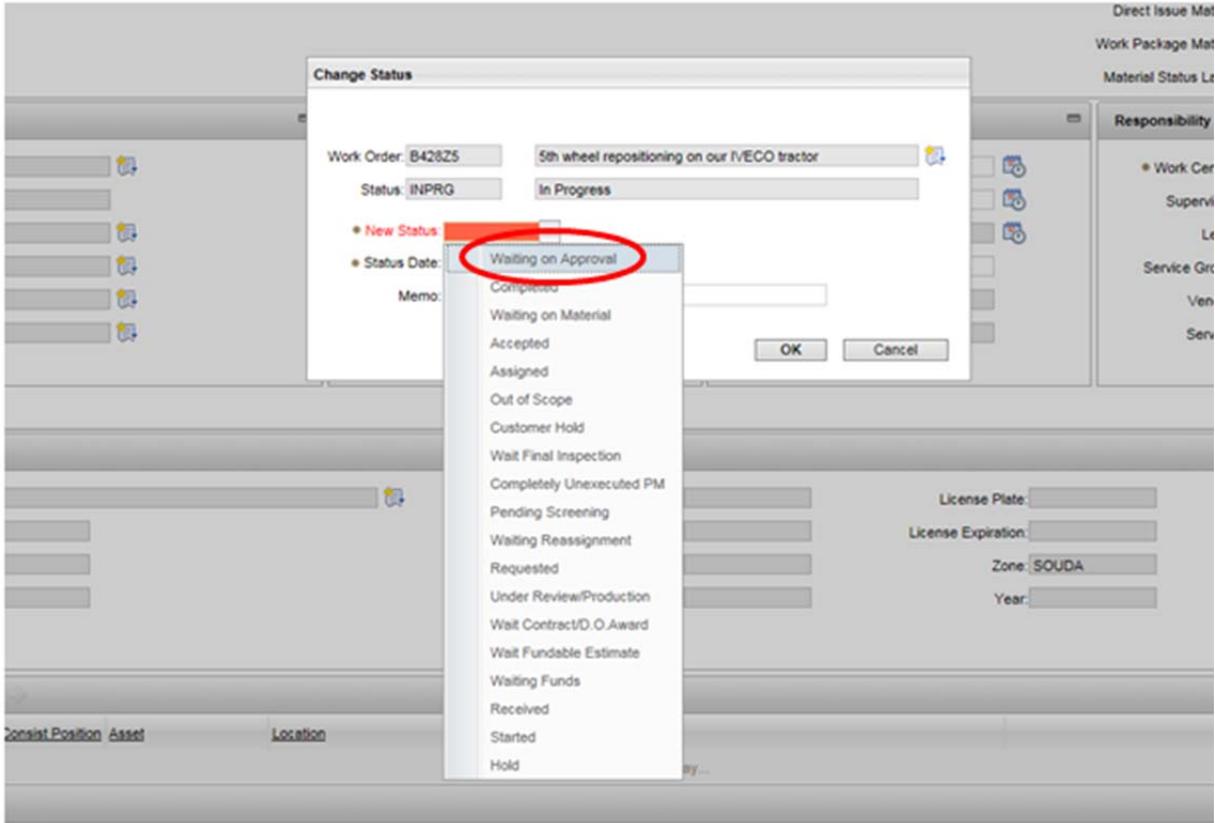


Figure 6-74: Work Order Tracking (Tr) Change Status (Waiting on Approval)

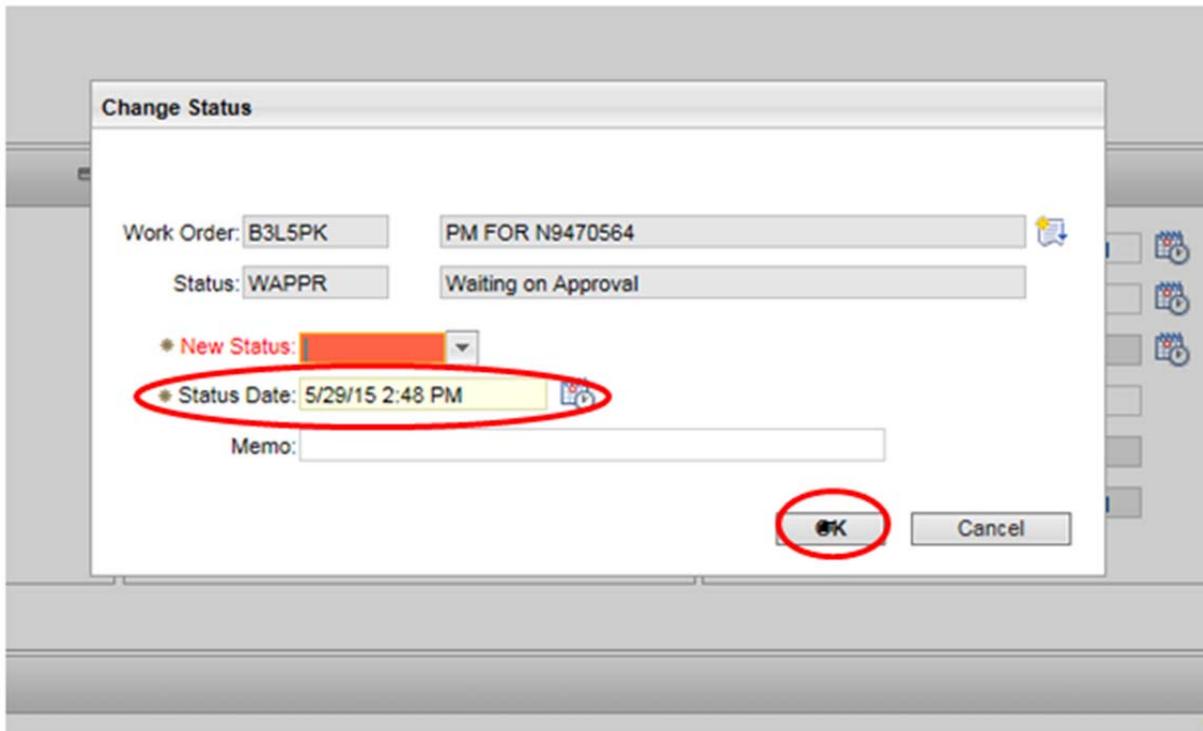


Figure 6-75: Work Order Tracking (Tr) Change Status Completed / Date Completed)

6.11.5.1 *Work Order Main Tab / Asset Details Sub Tab*

Data in this section defaults from the Asset (Tr) record.

6.11.5.2 *Work Order Main Tab / Work Details Sub Tab*

- Data in this section is optional or not applicable to BSVE at the current time.
- In the future, the “Reason for Repair” and “Work Accomplished” and “Part Failure” fields would provide considerable value by using these fields to capture analytical data that can be used to identify high failure components.

6.11.6 **Job Plans Main Tab**

- Use this sect to enter a work order task line for each specific task to be displayed on the work order report.
 - The task description and estimated duration fields should be populated.
 - All other fields are populated or the default values should remain unchanged.

6.11.6.1 *Actuals Main Tab and Sub Tabs*

- Data in these tabs are populated via interfaces.
- If a FEC’s BOSC contractor uses Maximo v7.1, this tab can be configured to allow manual entry data entry.

6.11.6.2 *Safety Plan Main Tab*

- This tab can be used to associate safety plans to include Hazards and Precautions, Hazardous Materials, and lock Out/Tag Out procedures to a work order.

6.11.7 **Non-Critical Success Factors**

Work Order Main Tab / Ownership Details Section

- Supervisor, Lead. Crew, Service Group, Vendor and Service are optional fields.

Plans Main Tab / Labor, Materials, services, Tools, and Repair Orders Sub Tabs

- Entering data in these tabs is optional.

Related Records Main Tab

- This tab is not currently used to support BSVE business practices.

Log Main Tab

- This tab is not currently used to support BSVE business practices.

Failure Reporting

- This tab is not currently used to support BSVE business practices.

Specifications Main Tab

- This tab is not currently used to support BSVE business practices.
 - It can be used to associate specification attribute data to work orders.

6.11.8 Down Hard Box – Completing Rental Type C and H Trip Tickets (Status – COMP)

The “Down Hard?” check box located on the Work Order Main Tab is an **IMPORTANT** field that must be updated correctly as it impacts vehicle metrics. This box should be checked if the vehicle is in a status removing it from the customer’s use, e.g., in the shop, etc. Examples when this box should not be checked include repairing a tire while the customer waits, changing a bulb while the customer waits, etc. These types of repairs usually require not more than ½ of an hour to complete.

This rationale applies to all vehicles, i.e., Navy Procured, GSA, commercially leased, and customer-owned.

NOTE: DO NOT CHECK “DOWN HARD BOX” IF ORDERING MATERIALS ONLY.

6.11.9 BSVE Specific Status Codes

Important: Once a work order is created and before the record is saved, follow the steps below.

- 1) The “Status Date” field will default to the date and time that the record was created.
 - a) Manually enter the date/time to reflect the date/time to which the work order should be backdated or received in the shop area.
 - i) If the record is saved and this field is not backdated, the field becomes read only and subsequent status change dates/times cannot be prior to that defaulted date/time.
 - (1) The approved date/time also defaults to that value if the date/time is not manually entered.
 - b) Once the “Status Date” field is manually populated to reflect the backdated value, the record can be saved.
 - i) The “Status Date” will reflect the backdated value.
 - (1) The approved date field remains null.
 - c) Change the work order status to IN PROGRESS.
 - i) This date must be later than the date/time that was backdated and displayed in the “Status Date” field.
 - ii) This value must also be entered via the change status function.
 - (1) The “Status Date” will now reflect the date/time that the status was changed to IN PROGRESS.
 - d) Change the work order status to COMPLETED.
 - i) This date must be later than the date/time displayed in the “Status Date” field.
 - ii) This value must also be entered via the change status function.
 - (1) The “Status Date” will now reflect the date/time that the status was changed to COMPLETED.

Only status codes in this section should be applied to any BSVE maintenance work order. Status codes are critical in terms of accurately capturing maintenance data principally used in support of metrics. The following status codes are the principal status codes used.

- Waiting on Approval (WAPPR) – status defaults when a work order is created.
- In Progress (INPRG) – places the work order in an in progress status.
- Completed (COMP) – status assigned to completed work orders.
- Canceled (CAN) – this status can be used after a work order is created but later determined that it is not required.

The aforementioned status codes will be used for the majority of work orders. The status codes below should be used when a work order is created to order material.

Waiting on Material (WMATL) – places the work order in an in progress status. Time required ordering parts while the vehicle/equipment is in an “in shop” status, e.g., the vehicle is down-hard and parts personnel are in the process of ordering parts or the vehicle/equipment is on deadline awaiting parts.

- Material Received (MATREC) – places the work order in an in progress status. Parts have been received and ready for issue.

The status codes below are used to order parts.

- Approved (APPR) – used to order material only.
- Waiting on Material (WMATL) – places the work order in an in progress status.
- Received (RECEIVED) – change to a complete status after material received.

6.11.10 Accident / Abuse Policy

Costs associated with vehicle accidents and abuse can be charged directly to the customer or captured as a 4-Million cost. This policy is a FEC based decision. If the customer is charged for this type of cost, follow the basic steps below.

- Notify the customer’s financial manager of the accident and the estimated repair cost.
- Use the GL Account from the trip ticket when creating the accident/abuse maintenance work order.
 - Labor will charged via SLDCADA
 - Parts/material will be charged via the Purchase Order application
 - All labor and parts/material will write back to the work order for record

6.12 Fuel Product (Tr) Module

6.12.1 Module Overview

This application contains information specific to each type of fuel whose costs were passed through the NAVFAC DoDAAC. The application is designed to inventory and define each fuel type, and is linked to individual fuel transactions in the Fuel Transactions Import (Tr) Module. Fuel Products will have standard National Stock Numbers (NSNs) or Local Item Control Numbers (LICNs) defined by NAVSUP or DLA, as well as Sub Ledger Accounts (SLAs) set up by the NAVFAC Financial Management Support Line. The Fuel Product (Tr) application serves as a lookup table to provide field defaults during the fuel

upload/entry process IF the cost data is not included in the imported file. An individual Fuel Product must be set up for each work center assigned to that particular fuel type. For example, if SFD (Diesel Fuel) will be used by 3 particular work centers, then 3 separate fuel products must be created in Fuel Product (Tr). Most Fuel Product Codes and Stock Numbers are available on DLA’s website.

http://www.energy.dla.mil/DLA_finance_energy/Pages/dlafp03.aspx

6.12.2 Critical Success Factors

Critical success factors are defined as (1) required to save a record in Maximo and (2) important in terms of associating assets and related fuel costs to fuel products passed through NAVFAC’s DoDAAC.

6.12.3 Module Application Tabs

6.12.3.1 Main Tab

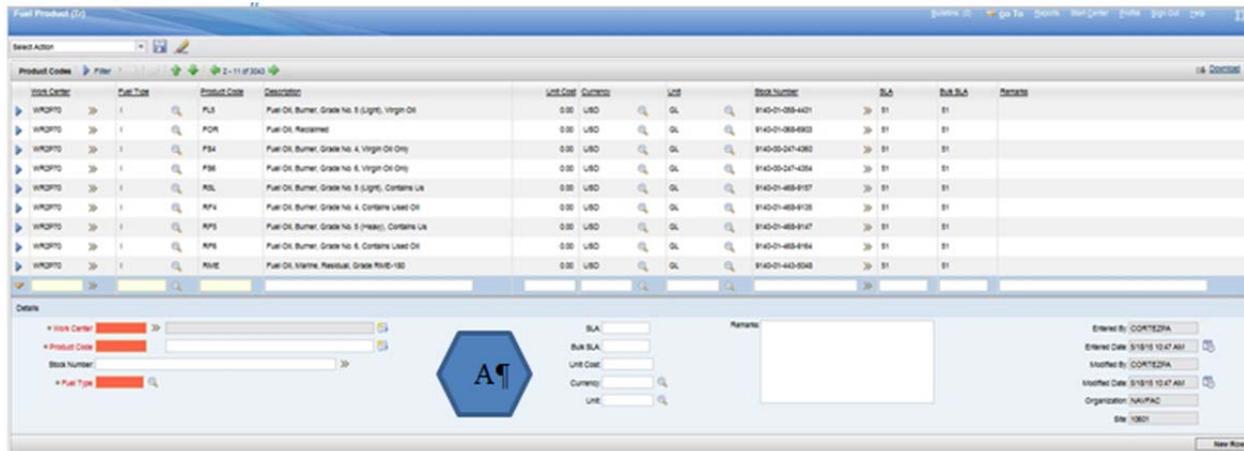


Figure 6-76: Fuel Product (Tr) Module Main Tab

Section	Title	Description
A Fuel Product Tr	Work Center	NWCF value assigned to each Fuel Product
	Product Code	DESC/DLA value used to identify each type of Fuel
	Stock Number	13 character National Stock Number (NSN) or Local Item Control Number used to identify each type of fuel. DESC/DLA NSNs will be used to facilitate consistency and standardization when possible.
	Fuel Type	One of three choices to identify each Fuel Product as either inventory, commercial or non-fuel (motor oil, car washing, etc.)
	SLA	The Standard Ledger Account associated to each Fuel Product. The SLA is a required DWAS input used for financial processing
	BULK SLA	Undefined Field
	Unit Cost	Cost of fuel per unit of issue
	Currency	Always US Dollars (USD)
	Unit	Unit of Measure for each fuel product, usually GL (Gallons)
	Remarks	A free-form field to add notes/comments
	Entered By	The user who initially created the Fuel Product in Maximo
	Entered Date	Date the Fuel Product was created in Maximo
	Modified By	The user who last modified the fuel product in Maximo
	Modified Date	Date the Fuel Product was last modified in Maximo
Organization	The organization assigned to the fuel card, always NAVFAC	
Site	The FEC Site ID assigned to the fuel card	

Table 6-34: Field Descriptions for Fuel Product (Tr) Module Main Tab

6.12.4 Fuel Product Processes

6.12.4.1 Creating a New Fuel Product

1. Select new row icon. Mandatory fields to save the record are highlighted in red.
2. Work Center – enter corresponding NWCF value.
3. Product Code – using the DLA link in section 6.12.1, enter the corresponding value.
 - a. Copy and paste DLA’s description into the adjacent field.
4. Stock Number – using the DLA link in section 6.12.1, enter the corresponding 13 character value.
5. Fuel Type – enter the corresponding value.
 - a. C – Commercial.
 - b. I – Inventory.
 - c. N – Non-Fuel.
6. SLA – Enter corresponding value obtained from FM department.
7. BULK SLA – undefined field.
8. Unit Cost – enter the cost of fuel per unit; user is required to convert to US Dollars if fuel is purchased at a different currency.
9. Currency – Enter USD.
10. Unit – Enter the two character unit value. User can use the value list for available choices and descriptions.
11. Remarks – Enter any other pertinent information into this field.
12. Save the Record.

6.13 Fuel Card (Tr) Module

6.13.1 Module Overview

This application contains information specific to the NWCF Work Center and funding associated with every Fuel transaction passed through the NAVFAC DoDAAC. All fuel coded to NAVFAC’s DoDAAC must have a corresponding Maximo Fuel Card; the only exception is DLA un-capitalized fuel orders as these are not passed through Maximo. The Fuel Card serves as a means to match asset and financial data in Maximo with fuel transactions either generated in Maximo manually or imported via external interfaces.

Fuel Cards must be created for each asset that will be issued fuel by means of commercial credit card, DESC/DLA chip key (Pro-key or Vil-key), fuel coupons, manual fuel issues from NAVFAC owned fuel inventory, or manual fuel issues from DLA using capitalized fuel. Fuel Cards must also be created for non-vehicle assets such as generators, boilers, gas cans, etc. across all of NAVFAC’s Public Works Product Lines. A Fuel Card must be established as detailed in section 6.13.4, and must be cancelled when the corresponding asset is decommissioned.

6.13.2 Critical Data Fields

The factors associated with the Fuel Card record date are:

1. Inbound fuel transactions from external systems providing NAVFAC fuel
2. Asset records in the Maximo Asset (Tr) module

6.13.3 Module Application Tabs

6.13.3.1 Main Tab



Figure 6-77: Fuel Card (Tr) Module Main Tab

Section	Title	Description
A Fuel Card (Tr)	Card Number	Unique value assigned to each fuel card
	GL Account	NWCF General Ledger account identifying the funds paying for fuel use
	Card Status	Operational status of the fuel card
	Work Center	NWCF value responsible for related fuel costs. Adjacent field identifies the Work Center description and auto-populates
	Asset Number	Value identifying the asset which received related fuel. Value should match an already existing value in the Maximo Asset (Tr) module when possible. Adjacent field identifies the asset description and auto-populates
	Pool Location	Value identifying the asset's pool location. Auto-populates when value is an existing record in the Assets (Tr) application
	POC	Person responsible for maintain the Fuel Card record
	POC Phone	Contact information for POC
	Account Number	Free-form field for FEC specific use
	Type Record	Value identifying fuel as either Commercial or Inventory
	Card Type	Value identifying the fuel origin
	Remarks	A free-form field to add notes/comments
	Entered By	The user who initially created the Fuel Product in Maximo
	Entered Date	Date the Fuel Product was created in Maximo
	Changed By	The user who last modified the fuel product in Maximo
	Changed Date	Date the Fuel Product was last modified in Maximo
Organization	The organization assigned to the fuel card, always NAVFAC	
Site	The FEC Site ID assigned to the fuel card	

Table 6-35: Fuel Card (Tr) Field Descriptions - Module Main Tab

6.13.4 Fuel Card (Tr) Processes

6.13.4.1 Creating a New Fuel Card

1. Select new row icon. Mandatory fields to save the record are highlighted in red.
2. Card Number –
 - a. WEX Fuel – WEX Account Number (FEC specific) + 5 digit Card Number located on front of physical WEX card. Contact local Fuel Administrator for specific value.

- b. PETROVEND Fuel – Petrovend Account Number (FEC specific) + 6 digit PIN established by Transportation. Contact local Fuel Administrator for specific value.
 - c. DESC/DLA Vil Key – must match the “BUNO” field of the corresponding physical fuel key. This normally matches the Maximo Asset Number or USN.
 - d. Fuel Coupons – must match the Maximo Asset Number or USN.
 - e. Bulk Fuel – must match the Maximo Asset Number or USN.
3. Note: Due to the Card Number requiring a unique value, assets receiving fuel from different sources may require more than one Maximo Fuel Card. Fuel by options C, D or E from above may use one Maximo Fuel Card with the USN, or Maximo Asset Number, as the Card Number.
4. GL Account – NWCF funds paying for fuel use.
5. Card Status – set to ACTIVE.
6. Work Center – enter corresponding NWCF value.
 - a. Adjacent description field will auto-populate with Work Center description.
7. Asset Number – enter corresponding value from Maximo Asset (Tr) module. If none exists, enter a value that clearly identifies the asset receiving fuel.
 - a. Adjacent description field will auto-populate if asset number exists in the Asset module.
8. Pool Location – value will auto-populate if asset number exists in the Asset module.
 - a. Adjacent description field will auto-populate if asset number exists in the Asset module.
9. POC – enter related information.
10. POC Phone – enter related information.
11. Account Number – use per FEC policy.
12. Type Record
 - a. C – Commercial
 - b. I – Inventory
13. Card Type
 - a. BULK – manually delivered fuel
 - b. COM – fuel from commercial credit card
 - c. COUPON – fuel from physical fuel coupon
 - d. FUELKEY – fuel from DESC/DLA Vil Key
14. Bulk Jon – undefined field.
15. Remarks – enter any other pertinent information into this field.
16. Save the Record.

6.13.4.2 *Programming a DESC/DLA Vil Key*

Vil keys are programmed by either NAVFAC or the local Fuel Farm using a non NAVFAC fuel system. Through coordination with NAVFAC customers and the Fuel Farm, all Vil Keys should be audited and reprogrammed annually by each PWD Transportation department. There are five crucial fields to populate. Additional fields are per FEC policy.

1. BUNO – must match Maximo Fuel Card “CARD NUMBER” value, usually equal to the Maximo Asset Number or USN.
2. DoDAAC – FEC specific six character value
 - a. EU: N33191
 - b. ML: N40085
 - c. SE: N69450
 - d. WA: **Need FEC input**
 - e. SW: N62473
 - f. NW: N44255
 - g. MA: N40192
 - h. HI: N62478
 - i. FE: **Need FEC input**
3. Signal Code

- a. A – Designates that the DoDAAC value will be charged for related fuel use.
 - i. BSVE fuel for NAVFAC owned assets should always use “A”.
 - b. B – Designates that the Supplemental Jon value will be charged for related fuel use.
4. Fund Code – FEC specific indicator
- a. EU: D6
 - b. ML: **Need FEC input**
 - c. SE: **Need FEC input**
 - d. WA: **Need FEC input**
 - e. SW: B4
 - f. NW: D7
 - g. MA: B3
 - h. HI: B1
 - i. FE: **Need FEC input**
5. Supplemental Jon
- a. If Signal Code = A – free form field for FEC use
 - b. If Signal Code = B – Six character paying DoDAAC value

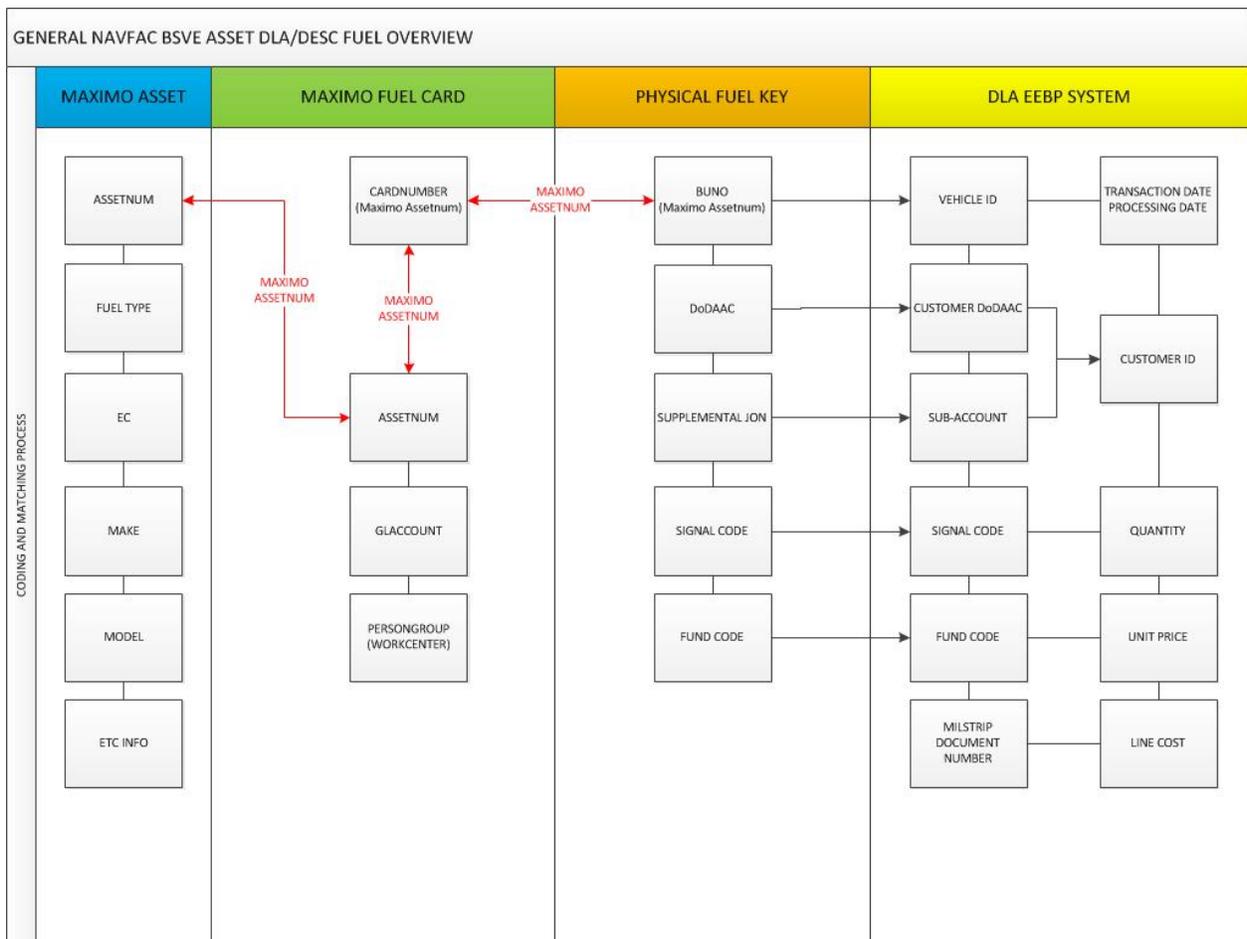


Figure 6-78: DLA Vil Key Flow Chart

6.14 Fuel Card (Tr) Application

6.14.1 Application Overview

This application is used to enter manual fuel transactions, correct fuel transactions, and query fuel transactions imported from external systems such as DESC/DLA, Petrovend, WEX, etc. All fuel transactions identified within NAVFAC's DoDAAC are available in this Maximo application.

Manual fuel transactions are entered when fuel is obtained via fuel coupons or dispensed from either mobile or stationary fuel tanks with NAVFAC owned fuel. Otherwise, this module is used to query, analyze or fix fuel records imported from external sources.

6.14.2 Critical Data Fields

The required factors associated with the Fuel Transaction records are:

1. A valid fuel product as identified in 6.12.1.
2. A valid fuel card as identified in 6.13.1

6.14.3 Module Application Tabs

6.14.3.1 Imported Transactions Tab

Figure 6-79: Fuel Transactions Import (Tr) Imported Transactions Tab

Section	Title	Description
A Fuel Transactions Import Tr	Transaction ID	Unique value assigned to each fuel card transaction.
	Type Record	Value indicating Commercial, Inventory or Non Fuel type.
	Card Number	Maximo Fuel Card associated with the transaction
	Work Center	NWCF value responsible for related fuel costs. Auto-populates from the related Maximo Fuel Card field when the Card Number field is populated.
	Stock Number	Value associated with the related Fuel Product. Auto-populates from the related Fuel Product when the Product Code field is populated.
	Account Number	Value associated with the related Fuel Card. Auto-populates from the related Fuel Card when the Fuel Card field is populated.
	GL Account	NWCF General Ledger account identifying the funds paying for the fuel use. Auto-populates from the related Fuel Card when the Fuel Card field is populated.

Section	Title	Description
	Document ID	DESC/DLA Fuel: <ul style="list-style-type: none"> MILSTRIP Document Number. FEC DoDAAC (6 characters) + Calendar Year (1 character) + Julian Date (3 characters) + Fuel Type Indicator (2 characters i.e. FF) + Serialization (2 characters)
	Requisition Number	Undefined field.
	SLA	Value associated with the related Fuel Product. Auto-populates from the related Fuel Product when the Product Code field is populated.
	Bin	Bin or tank for the item in the transaction
	Lot	Lot number of the item in the transaction
	Product Code	Type of fuel which can be used for the work center receiving the fuel use.
	Asset	Value associated with the related Fuel Card. Auto-populates from the related Fuel Card when the Fuel Card field is populated.
	Storeroom	Storeroom for the transaction. This field is required
	Item	Undefined field
	Vendor	Value identifying the fuel source (Wright Express, PETROVEND, DESC, GAS BOY, Manual, etc.)
	Failure Type	Type of failure that prevented the imported record from being reconciled, and would prevent a Maximo transaction record from being created.
	Prebill Status	Value indicating problems with fuel transaction preventing the record from being sent to DWAS
	Record Status	Status of the fuel transaction (NONEXPORT, FAILED, VALID or PENDING)
	Meter Reading	Asset/USN odometer reading imported from external files.
	Reference	Transaction reference number. This read-only field is populated with a system-generated value when a Maximo transaction record is created from the imported record.
	Alias	Alias for the asset. The Alias field is paired with the Asset field. An asset can have one or more aliases. You can enter either a Maximo asset identifier or an asset alias in the Asset field. If you enter an alias in the Asset field, Maximo recognizes it and replaces it with the Maximo asset identifier. Maximo moves the alias to Alias field. An alias can be associated with more than one asset. If you enter such an alias in the Asset field, Maximo displays a Select Value list of the assets that have that alias. The Alias field is read-only except on the Aliases sub tab of the Asset tab in Assets (Tr), where you can create asset aliases.
	Type	Type of transaction. There are three valid transaction types: INVENTORY, PO, and INVOICE.
	Invoice Number	Value indicating the credit card invoice number.
	Comments	A free-form field to add notes/comments
	Match?	Value indicating if the commercial credit card transaction matched a DESC/DLA transaction after export.

Section	Title	Description
	Record Created?	Read-only check box that specifies whether the imported record has had a Maximo transaction record created from it. The check box is selected if the status of the record is RECORD CREATED. The check box is cleared if the Create Record action has not been attempted, or if it failed.
	Reconciled?	Read-only check box that specifies whether the imported record has been reconciled with the Maximo database. The check box is selected if the status of the record is RECONCILED or RECORD CREATED. The check box is cleared if the Reconcile action has not been attempted, or if it failed.

Table 6-36: Fuel Transactions Import (Tr)Field Descriptions - Imported Transactions Tab

Section	Title	Description
B <i>Fuel Transactions Import Tr</i>	Quantity	Value indicating the number of units of fuel used.
	Unit	Measure by which fuel was dispensed, usually GL for gallon or LI for liter
	Unit Cost	Cost of fuel per unit.
	Line Cost	Unit cost multiplied by the quantity. Total value of fuel use.
	Transaction Date	Value indicating when transaction was entered into Maximo.
	Purchase Date	Value indicating when fuel was dispensed to NAVFAC.
	Currency	Value associated with the related Fuel Product. Auto-populates from the related Fuel Product when the Product Code field is populated. For now, currency will always be USD (U.S. Dollar)
	Commercial Cost	Undefined field.
	DWAS MCP Status	The Miscellaneous Cost Posting Status relative to DWAS. If the status is NULL, the record has not been sent to DWAS. (Note: Not all records are required to go out in an MCP file). Status of SNT lets the user know the record has gone to DWAS. Status of ACC signifies the record was Accepted by DWAS and DWAS successfully posted an Obligation/Receiving Report using the Document/Requisition number. Status of REJ signifies the record was REJECTED by DWAS. Status of HOLD signifies the record was put on Hold by DWAS.
	DWAS MCP Error	The Miscellaneous Cost Posting Error message relative to DWAS. If a record is REJECTED or put on HOLD by DWAS, the DWAS MCP Error field will be populated with the error(s) that caused it to be REJECTED or put on HOLD. NOTE: REJECTED records should be corrected in Maximo. Once corrected, the user should rerun the Prebill function to allow the record to be re-sent to DWAS. Records that were put on HOLD will require coordination with FM to correct.
DWAS MCP Date	The Miscellaneous Cost Posting Date relative to DWAS. This is the Date that DWAS processed the record.	

Section	Title	Description
	DWAS NFI Status	The Net Fuel Issue Status relative to DWAS. If the status is NULL, the record has not been sent to DWAS. (Note: Not all records are required to go out in an NFI file). Status of SNT lets the user know the record has gone to DWAS. Status of ACC signifies the record was Accepted by DWAS and DWAS successfully posted an ISSUE type expenditure transaction with document number "NETISS" followed YYMM and transaction ID (e.g. NETIS150200000875253). Status of REJ signifies the record was REJECTED by DWAS. Status of HOLD signifies the record was put on Hold by DWAS.
	DWAS NFI Error	The Net Fuel Issue Error message relative to DWAS. If a record is REJECTED or put on HOLD by DWAS, the DWAS NFI Error field will be populated with the error(s) that caused it to be REJECTED or put on HOLD. NOTE: REJECTED records should be corrected in Maximo. Once corrected, the user should rerun the Prebill function to allow the record to be re-sent to DWAS. Records that were put on HOLD will require coordination with FM to correct.
	DWAS NFI Date	The Net Fuel Issue Date relative to DWAS. This is the Date that DWAS processed the record.
	Entered By	The user who initially created the Fuel Transaction in Maximo.
	Entered Date	Date the Fuel Transaction was created in Maximo.
	Organization	The organization assigned to the fuel card, always NAVFAC.
	Changed By	The user who last modified the Fuel Transaction in Maximo.
	Changed Date	Date the Fuel Transaction was last modified in Maximo.
	Site	The FEC Site ID assigned to the fuel card.

Table 6-37: Fuel Transactions Import (Tr) Field Descriptions - Imported Transactions Tab

6.14.4 Fuel Card Processes

6.14.4.1 Creating a Manual Fuel Transaction

1. Navigate to Fuel Transactions Import (Tr) Application

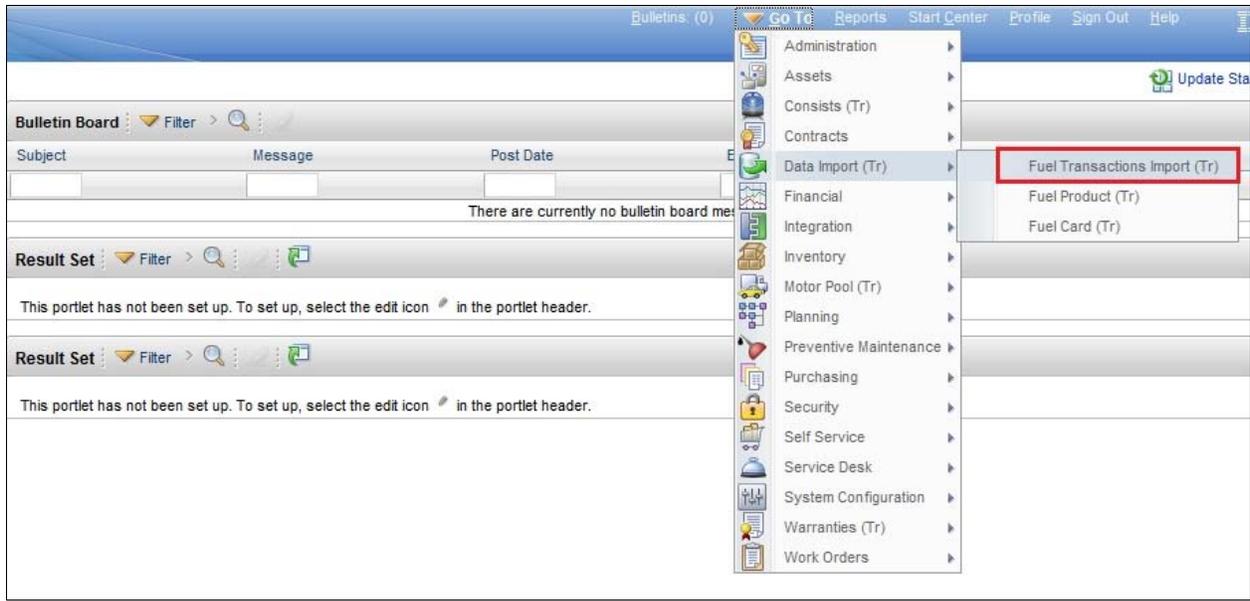


Figure 6-80: Fuel Transactions Import (Tr) Application Imported Transactions Tab

2. Select New Row.
3. Enter Type Record.
4. Enter Card Number. If none exists, contact local Fuel Administrator
 - a. Work Center auto-populates.
 - b. GL Account auto-populates.
 - c. Asset Number auto-populates.
 - d. Account Number auto-populates.
5. Enter Product Code. Use the Select Value option to choose from valid list of options. If the desired product code is not available, contact local Fuel Administrator.
 - a. SLA auto-populates.
 - b. Unit auto-populates.
 - c. Unit Cost auto-populates
6. Enter Quantity.
 - a. Line Cost will automatically populate according to quantity and unit cost
7. Purchase Date – Enter date fuel was dispensed.
8. Save Record.
 - a. Once the record is saved, it will appear above in the Imported Transactions area

6.14.4.2 Monthly Prebilling

Around the 5th of each month, NITC uploads external fuel transactions and uploads the data into Maximo. By the 16th of each month, all valid transactions are sent to DWAS giving the FECs and PWDs about 10 working days to run the fuel prebilling process as indicated below.

6.14.4.2.1 Message Reprocessing

As external fuel transactions are uploaded into Maximo, any perceived invalid data will be sent to Message Reprocessing. Once here, each transaction will note a specific error, and the installation will have up to 30 days to fix those transactions before they are cleared by NITC. Once fixed, all valid external fuel data is then made available in the Fuel Transactions Import (Tr) module. If a transaction is

cleared from message reprocessing before the transaction is fixed, user will have to submit a STS ticket with local CIO to have NITC upload the transactions again.

1. Navigate to Message Reprocessing application. Contact CIO via STS if module is not available.

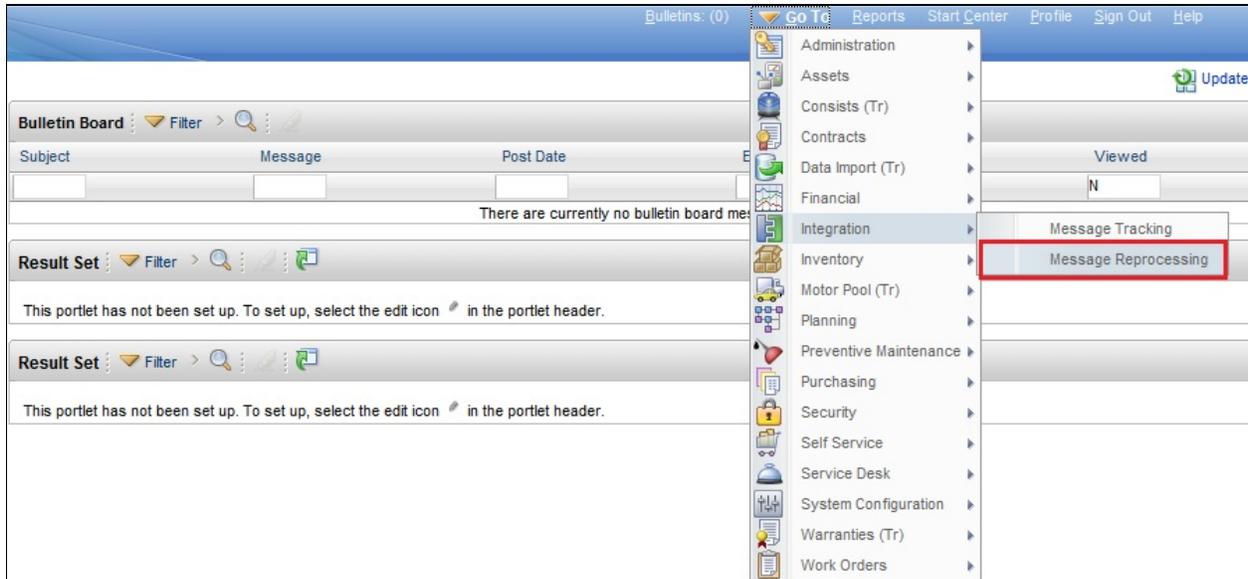


Figure 6-81: Message Reprocessing Application

2. Message Reprocessing application contains error messages for all FECs and external interfaces. User will need to query for specific site id and fuel only transactions using the filter option.
 - a) System:
 - i) DESC (DESC/DLA fuel transactions)
 - ii) WEX (Commercial Wright Express fuel transactions)
 - iii) GAS (Commercial Gas Boy fuel transactions)
 - b) Site: 5 character value for each FEC
 - i) WA: 10101
 - ii) ML: 10201
 - iii) HI: 10301
 - iv) MA: 10501
 - v) SW: 10601
 - vi) SE: 10701
 - vii) FE: 10801
 - viii) NW: 10901
 - ix) EU: 11001

Queue JNDI name	System	Message ID	Site	Service/Channel	Status	Error Message
	DESC		10901			
jms/maximo/int/queues/cqin	inNetFuelDesc	1430880099181426774	10901	IntNetFuelDescInface	HOLD	BMXAA5732E - System M
jms/maximo/int/queues/cqin	inNetFuelDesc	1430880099206754815	10901	IntNetFuelDescInface	HOLD	BMXAA5732E - System M
jms/maximo/int/queues/cqin	inNetFuelDesc	1430880099272145385	10901	IntNetFuelDescInface	HOLD	BMXAA5732E - System M
jms/maximo/int/queues/cqin	inNetFuelDesc	1430880099319648861	10901	IntNetFuelDescInface	HOLD	BMXAA5732E - System M
jms/maximo/int/queues/cqin	inNetFuelDesc	1430880099361165158	10901	IntNetFuelDescInface	HOLD	BMXAA5732E - System M
jms/maximo/int/queues/cqin	inNetFuelDesc	1430880099370349397	10901	IntNetFuelDescInface	HOLD	BMXAA5732E - System M
jms/maximo/int/queues/cqin	inNetFuelDesc	1430880099420450386	10901	IntNetFuelDescInface	HOLD	BMXAA5732E - System M

Figure 6-82: Message Reprocessing Application Filter Screen

1. Expand each record for detailed error message
 - a. BMXAA5732E - System Message: Card number: XXXXX was not found.
 - i. Action: Create a matching fuel card per 6.13.1
 - b. BMXAA9000E - GL: X.XXXXXXXXXX.XX.XXXXXXXXXXXXXX is not an Active GL.
 - i. Action: Work with local fuel administrator or FM department to find appropriate funding or activate funding in DWAS. Fix funding in the related fuel card only.
 - c. BMXAA5732E - System Message: Product Code: XXX was not found with Fuel Type 'X'.
 - i. Action: Work with local fuel administrator to create a fuel product per 6.12.1

All other error messages, contact local fuel administrator or create STS ticket with local CIO

2. Select all fixed transactions and reprocess by selecting “Process Selected Messages” under the Select Action drop down value.

6.14.4.2.2 Matching

Matching process in Maximo ensures that all WEX commercial fuel transactions have a corresponding DESC/DLA fuel transaction. WEX commercial fuel transactions that are not matched will not be passed to DWAS.

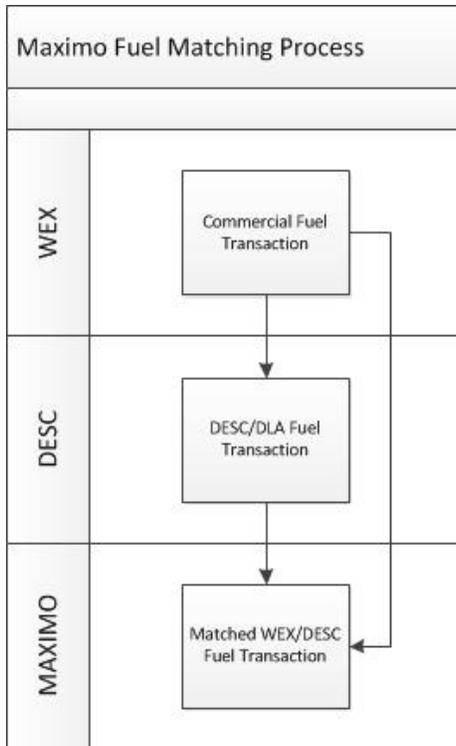


Figure 6-83: WEX/DESC/DLA Matching Process

1. Navigate to Fuel Transactions Import (Tr) application
2. Bottom right corner, click the “MATCH” button
 - a) System provides confirmation

28	REJ	5/27/15 7:48 PM	ACC	5/27/15 12:00 AM	10601	
59	ACC	5/27/15 7:50 PM	ACC	5/27/15 12:00 AM	10601	
33	REJ	5/27/15 7:48 PM	ACC	5/27/15 12:00 AM	10601	
6	ACC	5/27/15 7:52 PM	ACC	5/27/15 12:00 AM	10601	
16	REJ	5/27/15 7:48 PM	ACC	5/27/15 12:00 AM	10601	
4	REJ	5/27/15 7:48 PM	ACC	5/27/15 12:00 AM	10601	
9	REJ	5/27/15 7:48 PM	ACC	5/27/15 12:00 AM	10601	
10	REJ	5/27/15 7:48 PM	ACC	5/27/15 12:00 AM	10601	

New Row

Figure 6-84: Fuel Transactions Import (Tr) Application Matching Process

3. To query for unmatched transactions, navigate to the imported DESC tab
 - a) Only navigate to this tab after running the matching process
4. Select the appropriate site id by clicking on the value

- a) If they exist, unmatched records are listed in the section below
- 5. Resolving unmatched WEX commercial fuel transactions
 - a) Wait one more billing cycle as the missing DESC transactions may have not made the current month's import.
 - b) If problem still persists, open STS ticket with local CIO.

6.14.4.2.3 Prebill

Prebill feature processes, or reprocesses, fuel transactions and readies them for DWAS export. Failed, NONEXPORT and PENDING transactions require action to be taken before they can be sent to DWAS. All VALID transactions are sent to DWAS automatically.

- 1. Navigate to Fuel Transactions Import (Tr) application
- 2. Bottom right corner, click the "PREBILL" button
 - a) System provides confirmation

28	REJ	5/27/15 7:48 PM	ACC	5/27/15 12:00 AM	10601	
59	ACC	5/27/15 7:50 PM	ACC	5/27/15 12:00 AM	10601	
33	REJ	5/27/15 7:48 PM	ACC	5/27/15 12:00 AM	10601	
6	ACC	5/27/15 7:52 PM	ACC	5/27/15 12:00 AM	10601	
16	REJ	5/27/15 7:48 PM	ACC	5/27/15 12:00 AM	10601	
4	REJ	5/27/15 7:48 PM	ACC	5/27/15 12:00 AM	10601	
9	REJ	5/27/15 7:48 PM	ACC	5/27/15 12:00 AM	10601	
10	REJ	5/27/15 7:48 PM	ACC	5/27/15 12:00 AM	10601	

Figure 6-85: Fuel Transactions Import (Tr) Application Prebill Process

- 3. Query for invalid transactions
 - a) Filter Record Status column with value "!=VALID" or as needed
 - b) Ensure Site reads correct value

Transaction ID	Type Record	Record Status	Card Number	Product Code	Work Center	Document ID	Vendor
		!=INVALID					
929,814	I	FAILED	N9532033	DS2	WRRP70	N624735117FF24	DESC
929,813	I	NONEXPORT	53640930	DS2	WRRP70	N624735115FF26	DESC
929,812	I	NONEXPORT	53644311	DS2	WRRP70	N624735115FF25	DESC

Figure 6-86: Fuel Transactions Import (Tr) Application Invalid Transactions

- **NONEXPORT:** usually the funding with the associated fuel card is not set to export. These fuel transactions may be only for tracking purposes, but work with local fuel administrator if the fuel cards require active NWCF funding.
- **PENDING:** usually commercial fuel transaction missing DESC/DLA matching transaction.
Action: Wait one more billing cycle as the missing DESC transactions may have not made the current month’s import. If problem still persists, open STS ticket with local CIO.
- **FAILED:** fuel transactions have not passed the prebilling process. Expand the record and navigate to the “Prebill Status” field Card/Jon info not found:
Action: Fix Card Number or GL Account field in failed transaction and save. Create matching fuel card record or update funding in Fuel Card (Tr) application
- All other error messages, contact local fuel administrator or create STS ticket with local CIO

4. Select “PREBILL” again to reprocess fixed transactions

6.14.4.2.4 Post DWAS Failures

Post DWAS Failures: To be performed when the DWAS acknowledgements come back into Maximo after the 16th of each month.

1. Query for FAILED fuel transactions
 - a. Expand the record and navigate to the “DWAS” sections and note error messages.
 - b. Fixed as needed or create STS ticket with local CIO
2. Select “PREBILL” one more time to reprocess fixed transactions. Fixed transactions will be sent to DWAS again the 16th of the following month

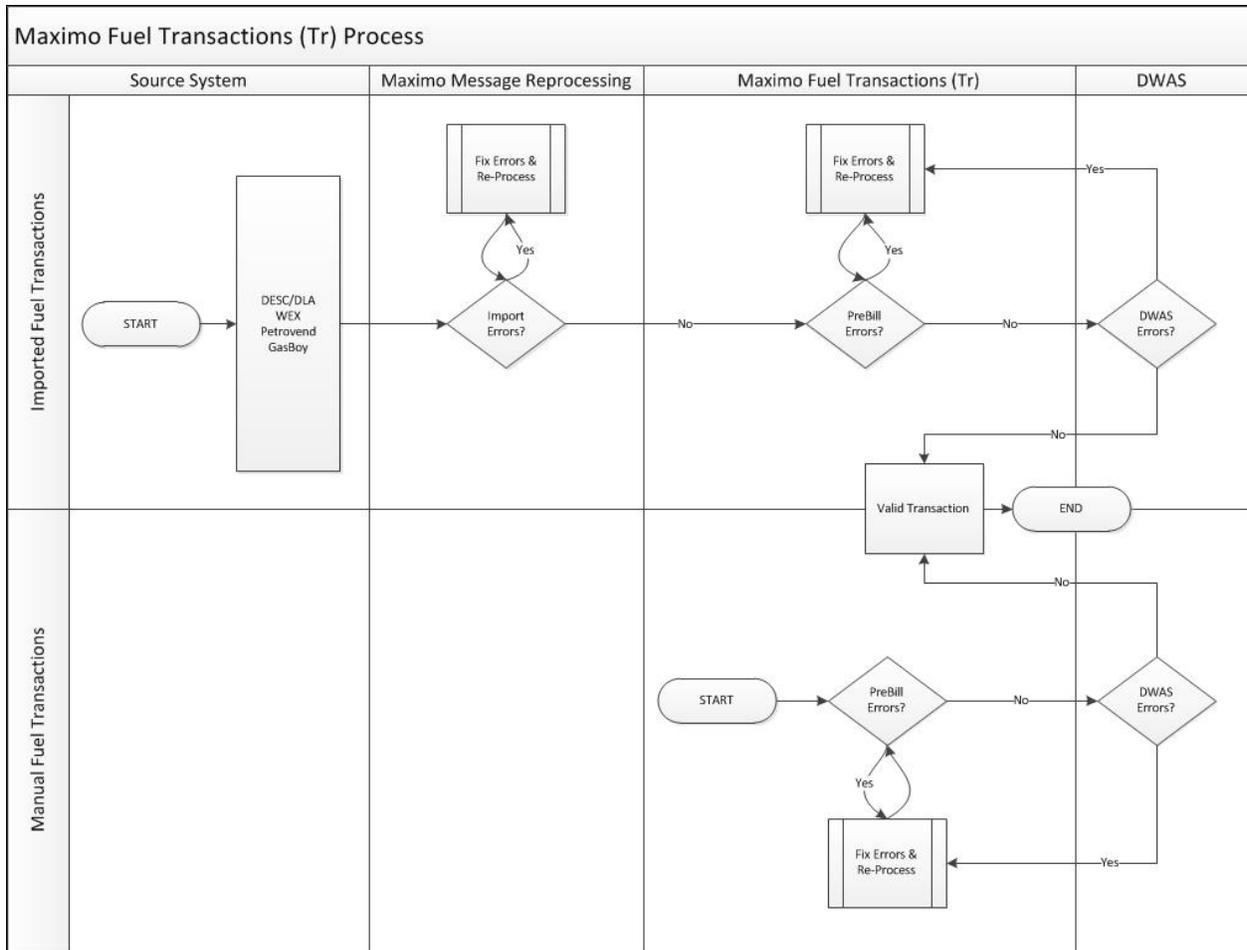


Figure 6-87: Monthly Maximo Fuel Process

6.14.4.3 **BULK Fuel Keys and Manual Fuel Transactions (TBD)**

6.14.4.4 **Correcting DWAS ACC Fuel Transactions (TBD)**

6.14.4.5 **Imported Meter Reading (TBD)**

6.14.5 **Relevant Corporate Guidance or Documentation in the Appendix**

Documentation hosted on the NAVFAC Portal at: <https://hub.navyfac.navy.mil>

7 ADMINISTRATIVE AND OTHER MODULES AND APPLICATIONS

This section will be created and expanded in future updates to the MUG. Sections will be prepared similar to those in chapter 5, for other Maximo modules to less commonly used applications used by NAVFAC. As the MUG develops, some of these modules may be moved to chapter 5.

Modules and Applications to be included in future MUG version will include:

- Purchasing
- Material Operations
- Administration
- Financial
- Inventory
- Planning
- Tool Room

APPENDICES

Guides are not intended to replicate/repeat other documented processes. They may be used as supplements/references for these other process (i.e. Resources to BMSs).

All appendices listed below are maintained on the [NAVFAC Maximo Portal Page](https://hub.navfac.navy.mil/webcenter/portal/pw/Facilities+Mgmt+&+Sustainment++/Maximo+User+Guide) located at <https://hub.navfac.navy.mil/webcenter/portal/pw/Facilities+Mgmt+&+Sustainment++/Maximo+User+Guide>

Maximo Procedure Guides (NAVFAC/PWBL Procedure Common to All)

A001—Customer Reference Code (CRC) Management Process [v1.2 - 11 August 2013]

- Explains the naming convention of CRC values, and how to request a new value via your FEC.

Appendix A. Public Works (BSVE) Procedure Guides

Appendix B. Public Works (FM&S) Procedure Guides

Appendix C. Public Works (FMFS) Procedure Guides

Appendix D. Public Works (UEM) Procedure Guides

Appendix E. Maximo Value Lists

F001—Site ID List

F002—Customer Reference Code (CRC) (as of 21 October 2015)

- All Maximo CRC values and descriptions available in Excel and PDF format.

F003—UNIFORMAT (Master System, System & Sub-System Values) (as of 11 March 2015)

- Current UNIFORMAT values in Excel format.

F004—Customer Reference Code (CRC) - FEC (as of 21 October 2015)

- FEC's can create a list of only valid CRC for that SITE-ID, by selecting the autofilter in cell B1

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Appendix I. Acronyms

Acronym	Definition
BL	Business Line
BMS	Business Management System
BOSC	Base Operations Support Contract
BSVE	Base Support Vehicles and Equipment Product Line
CESE	Civil Engineering Support Equipment
CI	Capital Improvements
CLIN	Contract Line Item Number
CRC	Customer Reference Code
DCR	Department of Conservation and Recreation
EC	Equipment Code
ECH	Echelon
FCI	Facility Condition Index
FEC	Facilities Engineering Command (Echelon IV)
FM&S	Facilities Management & Sustainment Product Line
FSC	Facility Support Contract
GL Account	General Ledger Account
HQ	Headquarters
IG	Inspector General
iNFADS	Internet Navy Facility Assets Data Store Management System
IO	Inventory Objective
IOID	Inventory Objective Identification Number
IPL	Integrated Project List
KPI	Key Performance Indicators
LANT BD	NAVFAC Atlantic Region Business Directorate
MDI	Mission Dependency Index
MUG	Maximo User Guide
MUST	Maximo Users Standardization Team
NAVFAC	Naval Facilities Engineering Command
NITC	NAVFAC Information Technology Center
PLMO	Product Line Management Office (Echelon III)
PM	Preventive Maintenance or Planned Maintenance
PO	Purchase Order
POC	Point of Contact
PS Code	Product Service Code
PS Deliverable	Product Service Deliverable
PWD	Public Works Department
QBE	Query by Example
QBR	Query Based Report
SIC	Standard Industrial Classification
SOA	Service Oriented Architecture
SR	Service Request
STS	Special Technology Solutions
Tr	Transportation
TRIO	Transportation Review of Inventory Objectives
UM	Utilities Management Product Line (Formerly Utilities and Energy Management)
VAM	Vehicle Allocation Methodology

Acronym	Definition
WO	Work Order
YTD	Year to Date