University of Michigan
Facilities Maintenance Work Management Process
6/9/2010
Level 1
1.0 Request for Work

1.1 On-line request for work

1.1 On-line Request for Work

If Emergency call POCC

1.2 Make Phone or Radio Call to POCC

2.1 Verify Information

1.3 Receive Call

1.0 Request for Work

Level 2

Originate Request for Work
1.1 On-Line Request for Work
Level 3

1.1.1 Log onto request for work form

1.1.2 Estimate Needed? No → 1.1.3 General fund item?
Yes → 1.1.4 General Fund Form
No → 1.1.5 Estimate Form

1.1.6 Non-General Fund request for work Form

Provide Transaction # to Originator

FMS Assigns Header Status Open → 2.1 Verify Information

Customer Approval Process

No
2.0 Work Order

Level 2

1.0 Valid Request for Work

2.1 Verify Information

2.2 Generate Work Order

2.3 Urgent Work?
   Yes
   2.4 Contact First Responder
   2.5 Change Phase Code to "Dispatched"
   2.6 Save Work Order
   2.7 Investigate Situation
   2.8 Fix Now?
      Yes
      2.9 Take Interim Action to Stabilize Situation
      2.10 Call for Help if Needed
      2.11 Add Notes to Work Order & Inform
      2.12 Mark Phase Complete
      2.13 Open New Phase
      6.2 Perform Work

   No
   6.2 Perform Work

2.1 Verify Info

3.1 Work Group Search for New Work Order

4
2.1 Verify Information

2.1.1 Is Information Adequate?
- Yes
- No

2.1.2 Plant Responsibility?
- Yes
- No

2.1.3 Current FMS Issue
- Yes
- No

2.1.4 Contact Originator

2.1.5 Correct Information Provided?
- Yes
- No

2.1.6 Add Note to Request for Work

2.1.7 Change Header Status Code to Rejected
- Email originator

2.2 Generate Work Order

Validation:
- Not a duplicate request
- No other action will take care of the problem (i.e. chiller is down and when fixed will take care of the hot/cold request being submitted)
- Validation in 1.2 performed concurrently with phone or radio call
2.2 Generate Work Order

Level 3

2.1 Verify Information

2.2.1 Change Request for Work Status to "Approved"

2.2.2 Close Request for Work Screen

2.2.3 Open Work Order Screen

FMS Marks Header Status "Assigned"

FMS Changes Phase 1 Status to "New Work"

2.2.4 Add Codes

2.2.5 More Phases Needed?

2.2.6 Add Phases

2.2.7 Notify Originator

2.2.8 Save Work Order

2.3 Urgent Request for Work?

1.3 Receive Call

No

Yes
4.0 Work Order Prioritization
Level 2

3.0 Work Order Accepted

4.1 Review Work Order Category

4.2 Review Work Order Criticality

4.3 Calculate PaRIS Number

5.0 Plan and Schedule Work

WO Categories

1. Admin
2. Improvement
3. Estimate
4. Standing
5. Training
6. Preventive/Predictive
7. Repair (Proactive)
8. Corrective (Reactive)

WO Criticality

1. Tracking
2. Project Work
3. Non-Dispatched Operational
4. Comfort
5. Dispatched Operational
6. Research
7. Environmental
8. Safety
9. Catastrophic

PaRIS = WO Category X WO Criticality
5.0 Plan and Schedule Work

Level 2

Self Planned:
- No other shop needed
- Only one craft
- No site visit needed
- No materials needed other than what is in stock
- No job plan library needed
- No permits needed
- No shutdown needed

5.1 Self Planned?
- Yes
- No

5.2 Plan Job

5.3 Non-Personnel Resources Needed?
- Yes
- No

5.4 Change Phase Status to "Ready to Kit"

5.5 Gather Non-Personnel Resources
- Yes
- No

5.6 Preparation Work Needed?
- Yes
- No

5.7 Add Preparation Work Phase

5.8 Gather Resources

5.9 Non-Personnel Resources Required?
- Yes
- No

5.10 Replenish Non-Personnel Resources

5.11 Change Phase Status to "Ready to Schedule"

5.12 Change Phase Status to "Scheduling"

5.13 Schedule Work

5.14 Change Phase Status to "Scheduling"

6.0 Perform Work

5.1 Plan and Schedule Work

Level 2
5.2 Planning Process

5.2.1 Review Work Order Backlog Assigned to Planner
5.2.2 Change Phase Status to “In Planning”
5.2.3 Sort Prioritize Work Orders
5.2.4 Site Visit?
5.2.5 Perform Site Visit
5.2.6 Are there any unique safety requirements?
5.2.7 Develop unique Safety Requirements
5.2.8 Is work order info correct?
5.2.9 Correct Info
5.2.10 Define Labor and Skill Requirements
5.2.11 Non-Personnel Resources Required?
5.2.12 Specify Non-Personnel Resources Required
5.2.13 Permits Required?
5.2.14 Describe / Obtain
5.2.15 Work Instruction Required?
5.2.16 Develop Instruction
5.2.17 Shut Down Required?
5.2.18 Develop Shutdown Plan
5.2.19 Package Job Plan
5.3 Non-Personnel Resources Needed?
5.5 Gather Non-Personnel Resources

Level 3

5.3 Non Personnel Resources Needed?

5.5.1 Get list of resources from job plan

5.5.2 In UM Inventory?

5.5.3 Put in Kit

5.5.4 Replenish non-personnel resources

5.5.5 Change Phase Status to Ready to Schedule

5.5.6 Change Phase Status to MATBEINGORDERED

5.5.7 Strategic Supplier?

5.5.8 Over $5,000?

5.5.9 Meet Regent Exception?

5.5.10 Fill Out Exception Form

5.5.11 Get PO Number

5.5.12 Initiate Bid Process

5.5.13 Bid Awarded

5.5.14 Enter PO in FMS

5.5.15 Order Material

5.5.16 Change Phase Status to MATORDERCOMPLETE

5.5 Ready to Schedule
6.0 Perform Work

5.0 Plan and Schedule

6.1 Non-Personnel Resources Required?

6.2 Perform Work

6.3 Worked as Planned/Scheduled?

6.4 Change Phase Status to Complete with Required Information

7.0 Follow Up

2.6 Fix Now

6.5 Get Kit/Parts (if self planned)

6.6 Contact Asset Supervisor

Level 3 of Complete Work

Left over material
Clean up (with coordination if necessary)
Notes
Inspection (formal or informal)
Communication
Close work order

5.13.8 Problem With Schedule?
7.0 Follow Up

Level 2

6.0 Perform Work

7.1 Review Customer Feedback with Originator (Job done, satisfaction)

7.2 Process Review

7.3 Update Job Plan?

7.5 Process Improvement?

7.6 Agenda Item in Process Meeting

7.4 Update Job Plan Library

7.7 Coaching Opportunity?

7.8 Coach

7.9 Training Needed?

7.11 Behavior Change?

7.10 Get Training

7.12 More training / coaching required?

7.13 Refer to Plant Ops policies or HR procedures

END
7.2 Process Review
Level 3

7.2.1 Review Metrics (weekly at first)

7.2.2 More Detailed Review Needed?

7.2.3 Other Problem Indicators?

7.2.3 Look at Work Orders

7.5 Coaching

7.3 Update Job Plan