

1 OVERVIEW

This process only pertains to Maximo generated, non-compliance related, Preventive Maintenance (PM) work orders (WO), individual or routed, in the status of 'Approved' or 'In Progress'.

Applicable reasons for a PM WO status change are:

- Building/system is going offline;
- System is no longer used;
- System is tagged out;
- Building is under construction;
- Request to change the PM program;
- A batch of work orders that need to have the status changed;
- University maintenance work (i.e. bldg. renovations, etc) that makes WOs not applicable;

Options to be considered for backlog PM WOs:

- Do the work, and a new work order will generate based on the PM frequency.
- Change the target start date if you are committed to accomplishing the work at a specific time.
- Change the status to **Not Performed**.
- Change the status to **Cancelled**.
- Batch **Complete**.

2 PROCESS

2.1 REQUEST STATUS CHANGE

1. Email the PM Group (sfp5=Steve Phayre and mtt34=Michael Tubbs) the following information:
 - a. The work order number(s) (if multiple, have them electronically in a spreadsheet or a table format of some sort).
 - b. The status change being requested for each WO. (see section 4)
 - c. The reason the change is being requested.
 - d. When you would like a new work order to come out. We can tell you if it will be different from what the PM frequency will make it.
 - e. If this a onetime change or is this a permanent change.
 - i. Are we ever going to do the work? If not we will follow the process for inactivating PM's.
 - ii. Not sure when we will do the work again? We will change the status of the PM to manual and will wait until we are asked to create new work orders.
2. The PM Group will review the request, based on status change impact analyses, and respond with recommended options based on impact. There may be follow up questions.
3. Communication will continue until the requestor and the PM group agree. At which point, the PM group will implement the changes and document the reason for the status change on the WO(s).

3 ROLES & RESPONSIBILITIES

3.1 FACILITIES MANAGEMENT (FM) PM GROUP

The FM PM Group is responsible for maintaining the PM records in Maximo. Outside the standard workflow, they are the only group that can change the status of PM WO generated for FM.

3.2 FM ZONE/OPERATIONS STAFF

Those with the job function of PM planning in the FM Zones & Operations groups can request status changes to PM WOs.

4 STATUS CHANGE OPTIONS & IMPACTS

4.1 AVAILABLE STATUSES

The following statuses are available for changing a PM WO from the status of 'Approved' or 'In Progress':

- **Not performed** – the decision has been made not to perform the work;
- **Complete** – the work has been completed; (applicable to only work orders with labor)
- **Cancelled** – the WO should not have been created to begin with; not applicable for WOs that have associated Labor and/or materials charged to it.

4.2 STATUS CHANGE IMPACTS

When changing a work order status, here are the possible results:

4.2.1 Floating PMs

A Floating PM is when the PM is waiting for the last work order to be completed, before it generates another work order.

Changing a work order to the status of **Not Performed**:

- We can change the status and backdate the change to a specific date. If the backdate interval is greater than the frequency, a new work order will generate by the next morning.
 - E.g. If the PM's frequency is 60 days, and we backdate the WO by 90 days, then a new WO will be generated for that PM that evening.
- If we just change the status, it will update the PMs last completed date with the current date, and the next work order will generate from that date plus the PMs frequency.

Changing a work order to the status of **Complete**:

- We can change the status and backdate the change to a specific date. If the backdate interval is greater than the frequency, a new work order will generate for the next morning.
- Change the status, it will update the PMs last completed date with the current date, and the next work order will generate from that date plus the frequency.

Changing a work order to the status of **Cancelled**:

- We can change the status and backdate the change to a specific date. If the backdate interval is greater than the frequency, a new work order will generate for the next morning. We also have the option to have it update the PM counter (which is responsible for the next Job Plan if the PM has rotating Job Plans).
- Change the status, it will update the PMs last completed date with the current date, and the next work order will generate from that date plus the frequency. We also have the option to have it update the PM counter (which is responsible for the next Job Plan, if the PM has rotating Job Plans).

4.2.1.1 Fixed PMs

Fixed PMs is the type of PM that generates a new work order on the frequency, regardless of the status of the previous work order.

Changing a work order to the status of **Not Performed**:

- We can change the status and backdate the change to a specific date and it will not affect the existing work order(s).
- If we just change the status, it will update the PMs last completed date with the current date, but will not adjust when the next work order is to come out.

Changing a work order to the status of **Complete**:

- We can change the status and backdate the change to a specific date and it will not affect the existing work order(s).
- If we just change the status, it will update the PMs last completed date with the current date, but will not adjust when the next work order is to come out.

Changing a work order to the status of **Cancelled**:

- We can change the status and backdate the change to a specific date and it will not affect the existing work order(s). We have the option to only cancel the last work order and update the PM to adjust the PM counter. If there are multiple open work orders, we can cancel one, or all, of the work orders previous work orders and not update the PM.

4.2.1.2 Routed PM WOs

If the WO is part of a route, the person that changes the WO status needs to ensure that the children are disassociated from the parent WO to ensure the parent's status does not overwrite the child's status.