PJTMGNT-01

Work Control: Planned Work Orders

Standing work orders are typically created at the start of a fiscal year and remain open throughout the year. Prior to the start of a new fiscal year, new standing work orders are prepared in the form of AiM "planned" work orders. This allows your department time to create, review and revise standing work orders and batch promote them into real work orders on June 30th. This document describes the process of establishing and promoting standing work orders.

CREATING A PROJECT

 Go to: Project Management > Project. Create an AiM project, with these settings. This project will facilitate a simple batch promote process of all your planned work orders into real work orders on July 1st.

AiM E Project					About Logout
Edit New	Search	Browse			
Action	15-STANDING	i	Last Edited by	Status	PLANNING
Copy Email Print	THIS PROJECT IS A	PLACEHOLDER FOR FY 15 PLANNED STANDING W	Project Group		
View				Budget	
Extra Description Account Setup	Shop	Estimated		Project Type	STANDING
Planned Work Orders Budget Change Order	Shop Person	Actual			PROJECT USED FOR PLANNED
Project Contract List		Service		Enforce Distribution	No

2. Create new planned orders or copy planned work orders from the prior fiscal Year.

CREATING NEW PLANNED WORK ORDERS

Go to: **Project Management > Planned Work Order**. Create new planned work orders if you have a need for a new standing work order that will be used every year. This is preferable to keeping external lists or files of standing work orders needed for the next fiscal. Just create a new planned work order, promote it, and it will be there along with other planned work orders for the next fiscal year.

a. In the Planned Work Order screen, create a new work order.

AiM E Planned Work Order, Add Project & Phase, then Save						
New Search	Frowse					
Action	15 0131244	Change to current	Fiscal Y	ear	Status	PROMOTED
Copy Email Print View	swo-gca-co For "SV	NTROL TOWER - DRIVERS TRAINING • easy reference, begin d VO" *(Standing Work Or	Customer Request Budget Version Planned Fiscal Year			
Extra Description Projects Sent Email	Organization	D0505 CUSTONAL SERVICES	Region	OSU-STILLWATER	Problem Code	
Notes Log User Defined Fields <u>Fiscal Year History</u>		GU = D0509 Ixiliary = ORG paying	Facility	SPECIAL PROJECT	Type Category	MAINTENANCE ACTIVITIES THAT SUSTAIN OR PREVENTIVE
<u>Status History</u> Related Documents	Contact Contact Phone	CHARLES SMADES Enter Manager 4057444385 or Supervisor Info	Property	<u>0077</u>	Job Priority	WORK ORDERS GENERATED
	Contact Email			CONTROL TOWER - DRIVERS	Job Friency	

b. Click: Projects (left side bar), select the Planned Work Order Project.

AiM = Projec	ts.	About Logout
< Back		
15-0131244		
SWO - GCA - CONTROL TO	VER - DRIVERS TRAINING	
Projects		Remove
Project	Description	Project Type Active
15-STANDING	THIS PROJECT IS A PLACEHOLDER FOR FY 15 PLANNED STANDING WORK ORDERS	STANDING

c. Create **Planned Phases** as needed by selecting **Copy** or **Add**. *NOTE: For Contract Services, enter the Shop overseeing the Project. The contractor field is left blank until a PO is awarded.*

AiM E Planned Pha	se						CKIS Abo	ut Logout
< Back								
Action	001		Last	Edited by On 02/07/2015	5 06:15 PM	Active	Yes	
Email	SWO - GCA CUSTO	DIAL SERVICE - CONTROL TOWER - DRIVERS TR	AINING			Planned Work Order	<u>15-0131244</u>	
Print	Begin wi	ith "SWO," include S	hop & P	roperty		Budget		
View	_	·	-			Location		
Extra Description								
Estimates	Shop	SERVICE CONTRACTS	Start	Feb 16, 2015		Funding Method	Organization	
Notes Log	For Con	tract Services, enter					-	
Related Documents	Shop	overseeing Project	Re	quired		work Code Group		
	Primary Person	· · · · · · · · · · · · · · · · · · ·		quircu		Work Code	CLEANING	
	·		End	Jul 01, 2015			CLEANING	
						Request Method		
	Priority	STANDING						
	Equipment		Asset			Туре	Service Contract	
						Contractor	<u>7123</u>	
	Equipment Group						GCA	
			Asset Type			Address Code	<u>01</u>	

3. COPYING PLANNED WORK ORDERS

When it is time to begin planning for the next year's standing work orders, assuming that all your standing work orders from the previous year were setup as planned work orders, simply create a new project (*see above - 1.Creating a Project*).

a. Copy the planned work orders into new ones and make the following changes:

AiM		Planned Wo	k Order		About	Logout
Nev	v	Search	Browse			
Action			15-0131244	Status	PROMOTED	
Copy	Сору			Customer Request		
Email		-	SWO - GCA - CONTROL TOWER - DRIVERS TRAINING	Budget		
<u>Print</u>				Version		

b. Change the copied Work Order to start with new Fiscal Year, in this case **16**-0169562.

AiM Planned Work Ord	er	Change to curr	ent Fiscal Ye	ar		About Logout
Save Cancel						
View Extra Description <u>Projects</u> Notes Log User Defined Fields Fiscal Year History	16-01699	562 - CONTROL TOWER - DRIVERS TRAINING			Status Customer Request Budget Version Planned Fiscal Year	PLANNING Q
<u>Status History</u> Related Documents	Organization	D0505 Q	Region	OSU-STILLWATER Q	Problem Code	Q
	Requestor		Facility	OSU-STILLWATER	Туре	MAINTENANCE Q
	Contact	CHARLES SMADES		SPECIAL PROJECT	Category	PREVENTIVE Q
	Contact Phone Contact Email	4057444385	Property	0077 Q	Job Priority	

- c. Click: **Projects** (see above 2a.)
 - i. Remove the old standing project and add current Fiscal Year.
- d. Add or edit phases as needed.
- e. Remove a Phase by setting Active to "No"

Phase	Click	to edit,	set Statu	is to inac	ctive or A	\dd —	
Phase	Pescription	Location	Shop	Work Code	Priority	Deficiency Priority	Ranking
001	SWO - GCA CUSTODIAL SERVICE - CONTROL TOWER - DRIVERS TRAINING	E	SERVICE CONTRACTS	CLEANING	STANDING		

4. PROMOTING PLANNED WORK ORDERS TO STANDING WORK ORDERS

On June 30th, you will batch promote planned work orders to create standing work orders. **First**, **update the Fiscal Year default**, go to: **System Administration** > Setup Menu: **System Setup** > **Edit**.

a. From **Project Management > Project >** Search for current Fiscal Year Project.

b. Promote planned work orders. Click: Edit > Planned Work Orders

AiM 🔳	Project						About	Logout
Edit	New	Search	Browse					
Action		15-STANDIN	G			Status	PLANNING	^
<u>Copy</u>		THIS PROJECT IS	A PLACEHOLDER FOR FY 15 P	ANNED STANDING W	/ORK ORDERS	Project Group		
Print								
View	/					Budget		
Extra Description		Shop		Estimated	I	Project Type	STANDING	
Planned Work Ord	lers							- 17

c. Select a **Work Order** under Planned Work Orders

AiM	Planned	Work Orders
Don	ie (Cancel
15-STA	ANDING	
THIS PRO	JECT IS A PLAC	EHOLDER FOR FY 15 PLANNED STANDING WORK ORDERS
Plann	ed Work C	Drders
Work O	rder	Description
<u>15-013</u>	1243	SWO - GCA - SOFTBALL COMPLEX
<u>15-013</u>	1244	SWO - GCA - CONTROL TOWER - DRIVERS TRAINING

d. Click: Edit, change status to PROMOTED

Planned Work Order			About	Help	Logout	
Save Cancel					AiM	
View	15-0131244	Status	PROMOTED	Q	1 i	
Extra Description		Customer Request			-	
Projects	SWO - GCA - CONTROL TOWER - DRIVERS TRAINING	Budget				
Notes Log		Version				
User Defined Fields						

e. Click: Save

Planned Work Order		
		AiM
	Message	
	You are about to promote the Planned Work Order <u>15-0131244</u> Would you like to continue?	
	Yes No	