Training Guide

College of Charleston

Operations & Maintenance
Central Energy Technician

REV NOV15
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Standard Operating Procedures

Roles and Responsibilities

CENTRAL ENERGY TECHNICIAN
The Technician is responsible for the input of detailed information into the IWMS System. The Technician is also accountable for maintaining accurate data, which is updated routinely. The Technician is responsible for completing the required work in a timely and professional manner. Also, the Technician must determine if additional resources are required to complete the work (labor and/or materials). If additional resources are required, the Technician is responsible for following the appropriate process to obtain the resources. The Technician is accountable for accurately reporting time daily for all work performed on Work Orders. After regular business hours, the Central Energy Technician is responsible for creating and dispatching work orders.

Work Order Business Process
A Work Order is utilized to track all time, materials, and efforts required to complete tasks. The below steps detail the process and the life cycle of a typical Work Order.

Processing a Work Order Phase
1. Check Daily Assignments to receive Work Order Phase assignment. Select the Daily Assignment that you are going to work on.
2. Review the work site to determine the effort needed to complete the work.
3. Decide if any additional resources (materials and/or labor) are required.
   If yes, follows the Resources Needed Business Process Work Flow below.
4. Preform the require work.
5. Add notes to the Phase Note Log as appropriate (i.e. job progression, location availability, etc.)
6. Add photos and documents to the Assignment as appropriate
7. Decide if the work is complete.
   If no, continue the work on the next available work day.
   Update Work Order Phase Status: WORK IN PROGRESS
   If work is on hold because you are waiting for additional resources, change the Work Order Phase status to: RESOURCES
   If yes, update Work Order Phase status to: FINISHED

Resources Needed

LABOR
1. Are additional labor resources needed?
   If yes, request addition labor resources, via email, from the Supervisor.

MATERIAL

Shop Stock
1. The Technician determines if required materials are available in the shop.
2. If yes, then obtain the material from the shop.
   • Record Material to the Work Order Phase.
   • Complete the required work.
Vending
1. The Technician determines if required materials are available in the Vending machine.
2. If yes, obtain material from the Vending machine.
   - Provide the Work Order + Work Order Phase numbers.
   - Complete the require work.

Inventory
1. The Technician determines if the required materials are available in the Shop Warehouse.
   - If yes, create a Material Request to obtain material from the Shop Warehouse
   - Receive requested materials from the Warehouse.
   - Complete required work.

Purchase

Non-Emergency Purchases
1. The Technician determines that the required materials are not available in Shop Stock, Vending, or Inventory.
2. The Technician creates a Material Request for the materials to be purchased. Status: SUBMITTED
3. The Supervisor processes the Material Request. Update Status: PROCESSED
4. The Technician should change the Phase status to RESOURCES if awaiting materials or additional help.

Emergency Purchases
1. The Technician alerts the Supervisor that emergency materials are needed.
2. The Supervisor authorizes the Technician to pick up required materials.
3. Technician Returns with Materials and Receipt.
   - Technician initials receipt.
   - Write Work Order and Phase number on the receipt.
   - Technician turns submits receipt to Supervisor.
4. Supervisor sends the Receipt to the Finance group. Finance group will follow the Invoice Business Process Work Flow to apply charges to Work Order Phase.

Time Card
1. Report the work time on the Time Card daily. Status: NOT POSTED

Creating a Quick Work Order
1. The Technician receives a work request after regular business hours.
2. The Technician calls the appropriate on-call technician and verbally communicates the work.
3. The Technician creates a Quick Work Order. Status: OPEN
4. The Technician assigns the Work Order to the appropriate Shop and Shop Person. Status: ASSIGNED
Navigation
Logging into AiM

Logging into the Production system: [https://mcc.battery.cofc.edu/fmax](https://mcc.battery.cofc.edu/fmax)

When training, use [https://tmcc.battery.cofc.edu/fmax](https://tmcc.battery.cofc.edu/fmax)

User Name: Use your MyCharleston username.

Password: Use your MyCharleston password. When in the training system, use the word training as your password.

Login: Clicking the login button passes the user login and password information to the system.

Trouble logging in? Contact Aaryne Elias at eliasam@cofc.edu
Work Order Phase Processing
This section will detail how to reference, change, and/or add information to an existing Work Order Phase.

Check Daily Assignments to receive Work Order assignment. Select the Daily Assignment that you are going to work on.

Work Order Phase – Receiving Work Order Daily Assignments
This procedure is used to find Daily Assignments.

1) Login to AiM™ and click ‘Work Management’ from the menu channel.

2) From the ‘Work Management’ menu channel, click on the ‘Daily Assignment’ link.

3) Click the ‘Search’ button.
4) Search by Technician's name. Enter the first and last name then click ‘Execute’.

5) Select work date to view assignments.

6) Select the three-digit Phase Number of the work to be completed.

7) You are now on the Work Order Phase screen and may commence work.
Review the work site to determine the effort needed to complete the work.

Decide if any additional resources are required.

If yes, follow the Resources Needed Business Process Work Flow below.

**Work Order Phase – Resources Needed**

**LABOR**

Are additional labor resources needed?

If yes, request additional labor resources via email from the Supervisor.

**MATERIALS**

**Shop Stock**

The Technician determines if the required materials are available in the Shop.

- If yes, then obtain the material from the shop.
- Record Shop Stock to Work Order Phase using ‘Record Shop Stock’ Process below.
- Complete the required work.

**Record Shop Stock to Work Order Phase**

This method is used to add Shop Stock to a Work Order Phase. Only Shop Stock from the Shop associated to the phase can be added.

1) From the Work Order Phase Screen click the ‘Edit’ button.
2) Click the ‘Shop Stock’ link on the View menu.

3) Click the ‘Add’ button.

4) Add Shop Stock Item. Click the ‘Stock Number’ icon. Follow the prompts and select the appropriate Stock Number and Location.
5) Enter the desired Quantity. Click the ‘Save’ button.

6) Click ‘Done’ button on the Shop Stock screen.
7) Click ‘Done’ button on the Phase screen.

8) Click the ‘Save’ button.
Vending

The Technician determines if the required materials are available in the Vending Machine.

- If yes, obtain material from the Vending machine.
- Enter Work Order Number + Phase Number in Vending Machine.
  - For example for Work Order 11111111 Phase 001, you would enter: 11111111001
- Complete the required work.

Inventory Material Request

Are the needed materials available in the Shop Warehouse?

- If yes, create a Material Request to obtain material from the Shop Warehouse using the ‘Create an Inventory Material Request’ process below.
- Receive requested materials from the Warehouse.
- Complete required work

Create an Inventory Material Request

This method is used to create Material Request for existing inventory available from the Shop Warehouse.

1) Login to AiM™ and click ‘Work Management’ link from the menu channel.
2) From the ‘Work Management’ menu channel, click the ‘Material Request’ link.

3) Click the ‘New’ button.

4) Add a detailed description.
5) Click the ‘Work Order’ Zoom icon. Follow the prompts and select the appropriate Work Order and Phase.  

*Note: If the Work Order number is known, add the Work Order number first then click the Zoom icon.*

6) Click the ‘Requested By’ Zoom icon. Follow the prompts and select the appropriate Shop Person.

7) Click the ‘Calendar’ icon. Select the appropriate ‘Date Needed’.

---

**Material Request**

- **Work Order Number:** 1598
- **Requested By:** 106336
- **Date Needed:** November 2015
8) Click the ‘Add’ button to add items to the request.

9) Select the Item Type. For inventory the ‘Add Stock by Warehouse’ option should be utilized.

*Note: To request materials not in inventory, follow the ‘Material Request for Materials that need to be Purchased’ process.*

10) Add a description of the item being added.
11) Search for the appropriate Warehouse by clicking the Zoom icon within the Warehouse box.

12) Select the appropriate Warehouse from the list.

13) Search for the appropriate Part by clicking the Zoom icon within the Part box.
14) Click on ‘Execute’ to view list of all eligible parts. Add search perimeters to the search boxes before clicking ‘Execute’ to find specific parts.

15) Select the appropriate Part from the list.

16) Enter quantity needed.
17) Click ‘Done’. Repeat steps 7-15 to add additional items.

18) Click ‘Save’. 
Purchase

If materials needed are not available in Stock Shop, Vending, or Inventory, follow the Purchase Business Process below.

Emergency Purchases

- The Technician alerts the Supervisor that emergency materials are needed.
- The Supervisor authorizes the Technician to pick up required materials.
- Technician Returns with Materials and Receipt.
  - Technician initials receipt.
  - Write Work Order and Phase number on the receipt.
  - Technician submits receipt to Supervisor.

Non-Emergency Purchases

- The Technician creates a Material Request following the process below for ‘Create a Non-Stock Material Request’. Status: SUBMITTED
- The Supervisor will process Material Request. Update Status: PROCESSED
- The Technician should change the Phase status to RESOURCES if awaiting materials or additional help.

Create a Non-Stock Material Request

This method is used to create Material Request that the Supervisor will use to create a Purchase Order.

1) Login to AiM™ and click ‘Work Management’ link from the menu channel.
2) From the ‘Work Management’ menu channel, click the ‘Material Request’ link.

3) Click the ‘New’ button.

4) Add a detailed description.
5) Click the ‘Work Order’ Zoom icon. Follow the prompts and select the appropriate Work Order and Phase.

Note: If the Work Order number is known, add the Work Order number first then click the Zoom icon.

6) Click the ‘Requested By’ Zoom icon. Follow the prompts and select the appropriate Shop Person.

7) Click the ‘Calendar’ icon. Select the appropriate ‘Date Needed’.
8) Click the ‘Add’ button to add items to the request.

9) Select the Item Type. For materials that need to be purchased, use the ‘Add Non-stock Part’ option or ‘Add Catalog Part by Vendor’. ‘Add Non-stock Part’ will be used in this example.

   *Note: To request materials currently stored in Inventory, use the ‘Material Request for Existing Inventory’ process found in this manual.*

10) Click the ‘Next’ button.
11) Add detailed description.

12) Click ‘Contractor’ Zoom 🔍 icon. Follow the prompts and select the appropriate Contractor (Vendor).

   Note: If Contractor is unknown, select the ‘Unknown’ Contractor (Vendor).

13) Add the Part identification number.

   Note: Part identification number should match the Contractor’s (Vendor) part number.
14) Click the ‘UOM’ Zoom icon. Follow the prompts and select the appropriate Unit of Measure.

15) Add the desired quantity.

16) Add the Unit Cost.

Note: If unknown, add $1.00.
17) To add additional items. Click the ‘Add’ button. Follow the previous steps 11-16.

18) Click the ‘Done’ button.

19) Click the ‘Save’ button.
**Work Order Phase – Add Note**

This method is used to add notes to the Work Order Phase Notes Log. **Add notes to the Phase Note Log as appropriate (i.e. job progression, location availability, etc.)**

1) From the Work Order Phase, select the ‘Edit’ button.

2) Select the ‘Notes Log’ link.
3) Select the ‘Add’ button.

4) Add detailed note.

5) Click the ‘Save’ Button.
6) Click the ‘Done’ Button.

7) Click the ‘Save’ Button.
Work Order Phase- Add Related Document
This method is used to add documents and pictures to the Work Order Phase. Add documents and photos to the Work Order as appropriate.

1) From the Work Order Phase, select the 'Edit' button.

2) Select the 'Related Documents' link from the View menu.
3) Select the ‘Edit’ button.

4) From the Document Listing section, click the ‘Add’ Button.

5) Click the ‘Choose Files’ button. Follow the prompts.
6) Choose the desired File from the Explorer Window.

7) Click the ‘Next’ button. Follow the prompts.
8) Click the ‘Zoom’ Icon. Follow the prompts and choose the appropriate File Type for the document.

Note: Choose the GENERAL File Type for a PDF, Work Document, or Excel Document. Choose the IMAGE File Type for a photo.

9) Click the ‘Next’ button. Follow the prompts.

10) Optional: add any required Attributes. Click the ‘Next’ button.
11) Optional: set the Permissions for the document. Click the 'Load' button.

12) Choose the appropriate Roles. Click the selection box next to each desired role.

13) Click the 'Done' button.
14) Click the ‘Next’ button.

15) Click the ‘Save’ button.

16) Click ‘Save’ button.
Decide if the work is complete.

If no, continue the work on the next available work day. Change the Work Order Phase Status to WORK IN PROGRESS.

If work is on hold because you are waiting for additional resources, change the Work Order Phase status to RESOURCES.

If work is finished, change Work Order Phase status to FINISHED.

**Work Order Phase – Change Status**

This method is used to update the Phase Status.

1. To update the status of the Work Order Phase, click ‘Edit’ on the Phase screen.

2. Search for Status options by clicking the ‘Zoom’ icon in the status box.
3) Select the appropriate Status. Click on the status name.

Note: The Technician is responsible for changing the status to one of the following:

- Work in Progress: technician is currently working on the Phase.
- Resources: Awaiting materials or additional help.
- Finished: Work is completely finished.

4) Click ‘Save’ on the Phase screen.
Time Cards

Report the time worked on the Time Card daily. Status: *NOT POSTED*

*Add/Edit Non-Posted Timecards - Extended Method*

The extended time card method is used to add/edit non-posted Timecards.

1) Login to AiM™ and click the ‘Time and Attendance’ link from the menu channel.

2) From the ‘Time and Attendance’ menu channel, click the ‘Timecard’ link.
3) Click the ‘New’ button.

4) **Optional:** Add a detailed description.
5) Enter the Shop Person, then click the ‘Zoom’ icon.

6) Select the Work Date. Click the ‘Calendar’ icon.
7) Add a Timecard Line Item Detail. Click the ‘Add’ button.

Note: Only one Line Item per Work Order or Leave Code.

8) Enter the Work Order number, then click ‘Zoom’ icon. Then follow the prompts.
9) Enter the total number of hours worked for this line item.

Note: time can be fractional in ¼ of an hour (.25, .5, or .75).

10) The below warning will appear if the selected Shop Person is not associated to the Shop on the selected Work Order/Phase. This Work Order/Phase cannot be used for this Shop Person.

   Note: The Shop Person on the Timecard for the selected Phase must be associated to the Shop on the Phase.

1. Error Code: 5114 Employee [000002] is not associated to the shop attached to the work order phase
2. Error Code: 6111 System Flag 111 Shop Person not assigned to shop

11) If applicable, add another line item. Click the ‘Add’ button.
12) Select a leave code, Click the ‘Zoom’ icon.

13) Choose the appropriate leave code from the list in the selection box.
14) Enter the total number of leave hours for this line item.

*Note: Time can be fractional in ¼ of an hour (.25, .5, or .75).*

15) Click the ‘Done’ button.
16) Click the ‘Save’ button.

17) **Optional**: Print a copy, click the ‘Print’ link in the Action Menu.

Note: Once printed, close the Time Card Summary Report Window by clicking the \( \times \) at the top of your viewing browser.

19) The Printed Report:
**Rapid Time Card**

This method is used for quick entry of Timecards.

1) Login to AiM™ and click the ‘Time and Attendance’ link from the menu channel.

2) From the ‘Time and Attendance’ menu channel, click the ‘Rapid Time Card Entry’ link.

3) Add the Work Date. Select a Work Date for the Timecard by clicking the ‘Calendar’ icon.
4) **Add the Shop Person.** Enter the Shop Person identification number then click the ‘Zoom’ \( \text{search icon} \) icon.

*Note: Enter the first few numbers of the employee id number and click ‘Zoom’ icon \( \text{search icon} \) to filter the returned search list.*

5) **Add the Line items.** Click the ‘Add Line Item’ button, one time for each desired line item.

Complete each Line Item:

6) **Optional:** Change the defaulted Time Type. Click the Time Type ‘Zoom’ \( \text{search icon} \) icon. Select the appropriate Time Type.
7) **Optional:** Change the defaulted Labor Class. Click the Labor Class ‘Zoom’ icon. Select the appropriate Labor Class.

8) Add a Work Order/Phase. Click the Work Order ‘Zoom’ icon to select a Work Order. Follow the prompts and select the appropriate Work Order.

9) Add the Phase. Click the Phase ‘Zoom’ icon to select a Phase. Follow the prompts and select the appropriate Phase.

*Note: The Phase will automatically populate if there is only one phase associated to the selected Work Order from the above step.*
10) Add the hours worked. Enter the hours worked for this Line Item.

*Note: Time can be fractional in ¼ of an hour (.25, .5, or .75).*

11) Add another Timecard Line Item. Click the ‘Add’ button.

*Note: The values in the light blue shaded region of the screen will be defaulted to the new Line Item.*

12) Add a Leave Code. Click the leave code ‘Zoom’ icon. Select the appropriate leave code.
13) Add the leave hours. Enter the leave hours for this line item.

Note: Time can be fractional in ¼ of an hour (.25, .5, or .75).

14) Save the Timecard. Click the ‘Save’ button.

15) If the selected Shop Person was not assigned to the Work Order’s Phase the below error will display. Click the ‘Yes’ button to proceed.
**Time Card from Daily Assignment**

This method is used for quick entry of Timecards from a Daily Assignment.

1) Login to AiM™ and click the ‘Work Management’ link from the menu channel.

2) From the ‘Work Management’ menu channel, click the ‘Daily Assignments’ link.

3) Click the ‘Search’ link.
4) Click the ‘Advanced Search’ link.

5) Add the following Search Criteria: Last Name and Work Date. Click the ‘Execute’ button.

6) Click the ‘Work Date’ link.
7) Click the ‘Timecard’ link.

8) Add the time worked to each Timecard line item.

Note: Completed timecard must total 7.5 hours.

9) Click the ‘Save’ button.
Work Order Creation

Central Energy is responsible for creating and dispatching Work Orders after regular business hours. The Technician calls the appropriate on-call technician and verbally communicates the work. The Technician creates a Work Order using the Quick Work Order process below. Status: OPEN

The Technician assigns the Work Order Phase to the appropriate Shop and Shop Person. Status: ASSIGNED

Quick Work Order

This method is used to enter a one phase Work Order. You cannot edit or search for existing Work Orders.

1) Login to AiM™ and click ‘Work Management’ from the menu channel
2) From the 'Work Management' menu channel, click on 'Quick Work Order' link.

3) Click the 'New' button.
4) Complete the Information boxes as outlined in the next steps.

5) Add a detailed description.

6) Add Organizational Information. Click Zoom icon. Follow the prompts.
7) Add Property Information. Click Zoom icon.

8) Add Work Order Classification Information. Click Zoom icon. Select Type and Category.

*Note: Select a Problem Code to automatically populate the Type and Category.*
9) Add the Phase Classification Information. Click Zoom icon. Select Work Code and Request Method. 

10) Add Shop Information. Click Zoom icon. Select a Shop and set the Priority. See Appendix C for the list of Priorities. 

11) Add the Shop Person on call. Click Zoom icon.
12) Click ‘Search’.

13) Enter the name of the Shop Person and click ‘Execute’.

14) Click on the Shop Person’s CWID number to select them.

16) Click the ‘Save’ button.
### Appendix A – Problem Code List

<table>
<thead>
<tr>
<th>Problem Code</th>
<th>Description</th>
<th>Shop</th>
<th>Priority</th>
<th>Type</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>CARPENTRY</td>
<td>CARPENTRY REQUEST</td>
<td>CARPENTRY</td>
<td>4-MEDIUM</td>
<td>MAINTENANCE</td>
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<td>4-MEDIUM</td>
<td>SERVICES</td>
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<td>6-ROUTINE</td>
<td>ALTERATIONS</td>
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<td>6-ROUTINE</td>
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### Appendix B - Work Classifications List.

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<thead>
<tr>
<th>Type</th>
<th>Category</th>
<th>Description</th>
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<td>ADMINISTRATIVE</td>
<td>SPACE REQUEST</td>
<td>REQUEST FOR NEW SPACE</td>
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<td>TRAINING</td>
<td>STAFF TRAINING</td>
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<td>ALTERATIONS</td>
<td>SPACE</td>
<td>SPACE ALTERATION/RECONFIGURATION</td>
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<td>SUPPORT</td>
<td>ASSESSMENT/TYPING FOR POTENTIAL ALTERATION</td>
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<td>CORRECTIVE</td>
<td>CORRECTIVE MAINTENANCE</td>
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<tr>
<td></td>
<td>EVENTS</td>
<td>EVENT SERVICES/FACILITY USE</td>
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<tr>
<td></td>
<td>GROUNDS</td>
<td>LANDSCAPE SERVICES</td>
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<td>LOCKSMITH</td>
<td>LOCKSMITH SERVICES</td>
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<td></td>
<td>MOVES</td>
<td>RELOCATION SERVICES</td>
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<td>Description</td>
<td>Due Hours</td>
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<td>1-EMERGENCY</td>
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<td>2-URGENT</td>
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<td>3-HIGH</td>
<td>WITHIN 05 WORKING DAYS RESPONSE TIME</td>
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<td>4-MEDIUM</td>
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<td>5-LOW</td>
<td>WITHIN 30 WORKING DAYS RESPONSE TIME</td>
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<td>6-ROUTINE</td>
<td>WITHIN REGULAR SCHEDULED TIME PERIOD</td>
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<td>7-ANNUAL</td>
<td>WITHIN THE FISCAL YEAR</td>
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<td>8-SAFETY</td>
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<td>9-SCHEDULED</td>
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**Appendix D – Work Order Status List**

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<td>WORK ORDER READY TO BILL</td>
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<tr>
<td>CLOSED</td>
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<tr>
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**Appendix E – Phase Status List**

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