# Table of Contents

STANDARD OPERATING PROCEDURES.................................................................................................................. 3

Roles and Responsibilities ................................................................................................................................. 3

Work Order Business Process .......................................................................................................................... 3

NAVIGATION .......................................................................................................................................................... 5

Logging into AiM O&M FIRE............................................................................................................................ 5

Navigating the O&M FIRE App ......................................................................................................................... 6

WORK ORDER PHASE PROCESSING............................................................................................................... 11

Work Order Phase – Receive Work Order Daily Assignments......................................................................... 11

Work Order Phase – Add Time......................................................................................................................... 12

Work Order Phase – Resources Needed .......................................................................................................... 13

Shop Stock......................................................................................................................................................... 14

Inventory Material Request.............................................................................................................................. 17

Purchase............................................................................................................................................................ 26

Work Order Phase – Add Note.......................................................................................................................... 35

Work Order Phase – Add Picture..................................................................................................................... 37

Work Order Phase – Change Status.................................................................................................................. 40

Work Order Phase – Report Time...................................................................................................................... 42
Standard Operating Procedures

Roles and Responsibilities

THE 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. Finally, the Technician is accountable for accurately reporting time daily for all work performed on 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 assignment. Select the Daily Assignment that you are going to work on.
2. Start clocking time for the Assignment by clicking the Stopwatch icon.
3. Review the work site to determine the effort needed to complete the work.
4. Decide if any additional materials are required.
   If yes, follows the Resources Needed Business Process Work Flow below.
5. Preform the require work.
6. Add notes to the Phase Note Log as appropriate (i.e. job progression, location availability, etc.)
7. Add photos to the Assignment as appropriate
8. Decide if the work is complete.
   If no, continue the work on the next available work day.
   Update the 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 Work Order on FIRE App.
   • 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 Work Order Number and Phase. For example for Work Order 11111111 Phase 001, you would enter: 11111111001

Inventory
1. The Technician determines if the required materials are available in the Shop Warehouse.
2. 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 Work Order 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.
Navigation

Logging into AiM O&M FIRE

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.

**System:** This field is populated with the system URL. Make sure you are using the training URL when training.

**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
Navigating the O&M FIRE App

1) Login to O&M FIRE™ and click ‘Work Management’ link from the menu.

2) The Assignment tab in the icon tray contains the Work Assignments for today. This will change daily.
3) Click the Queue tab in the icon tray. The Queue tab contains all active Work Assignments.

4) Click the Work Order tab in the icon tray. The Work Order tab contains all active Work Assignments.
5) Click the Timecards tab in the icon tray. The Timecards tab contains today's time entries. At the end of the day, this should total 7.5 hours.

6) When working on an iPhone, click the More tab in the icon tray to see additional choices.
7) The More menu includes more options. On an iPad, these options can be seen by clicking the ‘Home’ icon.

- Customer Request – Create and View existing Customer Requests
- Work Order – Navigates to the current Work Order
- Phase in Progress – Navigates to the Phase where time is currently being traced
- Back To Main – Returns to the Main Menu

8) Click the ‘Back To Main’ link.
9) Click the ‘Exit’ icon to log out.

10) You are now back to the O&M Fire Login screen.
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 – Receive Work Order Daily Assignments
This procedure is used to find Daily Assignments.

1) Login to O&M FIRE™ and click ‘Work Management’ link from the menu.

2) The Assignment tab in the icon tray contains the Work Assignments for today. This will change daily.
3) Select one Work Order Phase.

**Work Order Phase – Add Time**

Start clocking time for the Assignment by clicking the Stopwatch icon.

4) Click ‘Stopwatch’ icon. This will start the clock.
5) An informational box appears. Click the OK button. Begin the required 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.

If no, continue to the next step in this process.

**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 record Shop Stock to the Phase.

1) From the Phase Screen click the Shop Stock 🛒 icon from the icon tray.
2) Select a shop stock location with corresponding stock item from the list.

Note: Scroll to the end of the list, select the ‘Load more…’ link to find more items.
If the Stock Number is known, type the stock number in the search ‘Criteria’ box.

3) Click the appropriate Stock Location and Item from the list.
4) Add Quantity used.

5) Click the ‘Save’ link.
6) Click ‘OK’ in the information box.

Note: Follow the previous steps 2-6 to add additional Shop Stock.

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

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) Click the ‘Material Request’ icon from the icon tray.

2) To add detailed description click the ‘Description’ link.
3) Add detailed description and click ‘Done’.

4) To add a line item to the request click the ‘Line Item’ link.
5) Click the ‘+’ icon to add a warehoused part.

6) Click the ‘Warehouse’ link.
7) Select a Warehouse from the list. Click the Warehouse identification link.

8) Click the ‘Class’ link.
9) Select an inventory class from the list. Click the class identification link.

Note: Scroll to the end of the list, select the ‘Load more…’ link to find more items. If the Class is known, type the Class in the search ‘Criteria’ box.

10) Click the ‘Commodity’ link.
11) Select an inventory Commodity from the list. Click the Commodity identification link.

Note: Scroll to the end of the list, select the ‘Load more…’ link to find more items. If the Commodity is known, type the Commodity in the search ‘Criteria’ box.

12) Click the ‘Part’ link.
13) Select an inventory part from the list. Click the part identification link.

*Note: Scroll to the end of the list, select the 'Load more...' link to find more items. If the Part is known, type the Part in the search 'Criteria' box.*

14) Add desired quantity then click 'Save'.
15) Click the ‘Material Request’ link.

*Note: To add additional Warehoused parts, click the + icon and follow the previous steps 5-14.*

16) Click the ‘Phase’ link to return to the Phase screen.
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.
   a. Technician initials receipt.
   b. Write Work Order and Phase number on the receipt.
   c. Technician turns submits receipt to Supervisor.

Non-Emergency Purchases

The Technician creates a Material Request following the process below for Non-Stock Material Request. Status: SUBMITTED

The Supervisor will finalize 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) From the Work Order Phase Screen, touch the ‘Material Request’ icon located at the bottom of the screen.

<table>
<thead>
<tr>
<th>Phase 001</th>
<th>Material Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Order</td>
<td>0000002</td>
</tr>
<tr>
<td>Phase</td>
<td>EE1</td>
</tr>
<tr>
<td>Description</td>
<td>CARPENTRY REQUEST</td>
</tr>
<tr>
<td>Location</td>
<td>CDFP</td>
</tr>
<tr>
<td>Property</td>
<td>B18</td>
</tr>
<tr>
<td>Status</td>
<td>ASSIGNED</td>
</tr>
<tr>
<td>Work Cost</td>
<td>$50000</td>
</tr>
<tr>
<td>Priority</td>
<td>4 MEDIAN</td>
</tr>
<tr>
<td>Shop</td>
<td>CARPENTRY</td>
</tr>
<tr>
<td>Asset</td>
<td></td>
</tr>
<tr>
<td>RM</td>
<td></td>
</tr>
<tr>
<td>Extra Description</td>
<td></td>
</tr>
<tr>
<td>Notes Log</td>
<td></td>
</tr>
<tr>
<td>Related Documents</td>
<td></td>
</tr>
<tr>
<td>Material Requests</td>
<td></td>
</tr>
</tbody>
</table>

2) Select ‘Line Items’ to add materials to the request.
3) Select the Plus symbol (+) in the top right corner.

4) Select ‘Warehouse’
5) Select your shop’s “Non Stock Warehouse”. The Carpentry Shop was used in this example.

6) Select ‘Part’.
7) Select the ‘Non-Stock Part’.

8) Enter the quantity.
9) Select ‘Save’.

10) Repeat steps 3-9 to add additional items. Select ‘Material Request’ to return to the Material Request screen.
11) Select ‘Description’.

12) Type a detailed description of what materials need to be purchased.
13) Select ‘Done’ to return to the Material Request screen.

14) Select ‘Save’.
15) Select the Phase Number in the top left corner to return to the Phase screen.
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 screen, scroll down to the Notes option. Click the 'Notes' link.

2) Click the ‘Plus’ link to add a new note.
3) Click into the note area. Using the keyboard, type a detailed note.

4) Click the ‘Save’ link.
5) Click the ‘Phase’ link to return to the Phase screen.

**Work Order Phase – Add Picture**

This method is used to add a picture to the Phase Related Documents. **Add photos to the Assignment as appropriate.**

1) Click the ‘Camera’ icon.
2) Click the ‘Take Photo’ option from the informational box.

3) Click the ‘Shutter’ button to take the photo.
4) Click the ‘Use Photo’ link to use the photo.

*Note: If the photo is not acceptable, click the “Retake” link and retake the photo.*

5) Click the ‘Phase’ link to return to the Phase screen.
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) Click the “Status” link.
2) 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 this Phase
- Resources: Awaiting materials or additional help.
- Finished: Work is completely finished.

3) The Status is updated.
At the end of each day, report the work time on the Time Card.

**Work Order Phase – Report Time**

1) At the end of work, stop the Stopwatch. Click the ‘Stopwatch’ icon.

2) If necessary, adjust the work hours.

*Note: Hours should be in 15 minute increments (.00, .25, .50, or .75).*
6) If necessary, adjust the Time Type. Click on Time Type. Follow the prompts and select the appropriate Time Type.

- RT: Regular Time
- OT: Over Time
- DT: Double Time

7) Click the ‘Save’ link.
8) An informational box appears. Click the ‘OK’ link.

9) Click the ‘Done’ link.
10) You are now back to the Daily Assignments list. Click the ‘More’ tab icon.

11) Click the ‘Back To Main’ link.
12) You are now back to the Main Menu. Log out of AiM FIRE by selecting the ‘Log Out’ icon in the bottom right corner of the screen. The process is complete.