1. **PURPOSE:**

The purpose of this Work Execution Expectations document is for the Planners to understand, and apply consistent, best practices for process, planning, and creating a work plan on work orders.

1. **INSTRUCTIONS:**

* **Work order Selection**

Planner will select Work Orders to be planned from the WPLAN queue based on the following daily sort criteria;

* Sort by Planner Group
* Sort by Finish No Later Than date (Required Finish Date)
* Sort by Start No Earlier Than date (Required Start Date)
* Sort by Priority
* Sort by Charge Cost Object and Financial Sponsor
* Sort by Safety or Safe Access

Note: Other sorts are available if work is needed for specific Work Groups or Trades

* **Work order Review**

Once a Work Order is selected for Planning from the above criteria, the planner must take Ownership of the Work Order and review all pertinent information associated with the new work request; this includes but is not limited to:

* Short and Long Descriptions
* Attachments
* Log entries
* Work Order History
* Originating Record
* Note: The planner may require to either visit the job site or communicate with the Contact designated on the work order via Maximo Communication Log, to gather any added information.

Upon understanding the needs and expectations of the request, the planner must verify and update the following fields of the Work Order:

* Well defined work order description (provides project expectation)
* Work Type
* Failure Class
* Asset number
* Problem Code
* Major Maintenance Code
* Urgency
* Planner Group
* Verify Charge Cost Object number and Financial Sponsor.
* If an alternate Planner group is to perform the planning support, add learned information to the LOG, edit WO type and/or Planner group, and return to WPLAN

***Note: All edits should be documented in the work order Log***

* **Work order Job Plan**
  + Select the appropriate Job Plan, from the Job Plan Library, that is in alignment with the work needs
  + Modify template Job Plan to develop a detailed Work Plan to the Work Order; this should be structured to give guidance and task expectations, to the technicians performing the work.
  + If a template Job Plan is not available, script the work plan to ensure clarity and expectations.
* **Work order planned Materials**
  + Stocked Items: Identify Item number and Quantity, on the Material List on the Plan Tab
  + Direct Issue (non-stocked but has a OPP stores item numbers): Identify Direct Issue number and Quantity, on the Material List on the Plan Tab (*Note: Planners must ALSO type the non-stocked item requests in as a* ***Desktop Requisition****)*
  + Direct Issue Purchased Items goods that do not have OPP stores items numbers: Create a Maximo **Desktop Requisition** and add “*Misc items purchased on PO*” on Material Plan tab
* **Work order Labor needs**

Identify the proper Trade, Skill Level, Quantity, and Hours needed to accomplish this work and add it to the Labor Tab on the Plan Tab

The Work Order should be planned to the lowest trade possible that can do the task.

* **Work Order Date fields**

When Direct Issue Materials are Required, process work order as follows:

* Do not populate Schedule Start or Schedule Finish dates
* Do not select a Work Group or Supervisor
* At this point you are still the owner and the work order is in PLANNING status and in work flow
* With the work order open, go to the Common Actions in the left-hand column and select Change Status. Manually change status to WMATL
* Return to your Start Center to move away from the work order
* At this point you retain ownership and the work order moves to the “Work Orders Owned by Me Waiting on Materials” portlet on your home screen.
* Work flow has not been broken, and Maximo recognizes the work order is still in a Planning status
* Create Desktop Requisition for the Direct Issue Materials and attach any quotes you have
* Your requisition and purchasing’s processes can be completed for this Work Order
* You now have the Work Order positioned to visually monitor it in the “Work Orders Owned by Me Waiting on Materials” portlet on your home screen.
* Soon you will receive a Maximo email that says your materials have been received for this work Order
* Open the Work Order to confirm the materials have been received in the “View - PO Information” in the left-hand column under More Actions
* If you are satisfied your materials are here and work can commence, it’s time to proceed
* In the Work Order short description note “MATERIAL HERE PO #XXXXXX”
* Populate the Schedule Start and Schedule Finish dates with your best estimate for when this work should be done
* Populate the Work Group and Supervisor fields
* Using the routing button, route to WSCH
* You will lose ownership and the Work Order will disappear from you queue and it will become the full responsibility of scheduling and the supervisor

When Direct Issue Materials are not Required, process work order as follows:

* Populate the Scheduled Start Date field with an appropriate date that is at least Two (2) weeks in the future from today’s date
* Populate the Scheduled Finish Date field with an appropriate date that is at least One (1) week after the Scheduled Start Date
* If Planning needs to have the Work Order sent to a specific Work Group populate the Work Group and Supervisor fields with the appropriate Work Group and Supervisor
* If Planning determines this Work Order can go to any Work Group that has the necessary Trade and Skill Level, leave the Work Order and Supervisor fields blank and Scheduling can send the work where they need to for “Load Leveling”

Rev 1.1 3/18/2019 New release

Rev 1.2 9/16/2020 Removed CBN reference and added Charge Cost Object

Rev 1.3 6/3/2021 Added notations:

Planner take ownership at time of WO review

Planner to document LOG notes if removing ownership and returning to WPLAN

Non-stock ITEMS must be ordered via Desktop Req