Introduction:

Maximo is now the data of record for jobs and any transactions (details) that are reported against those jobs over the course of the month. The functions and processes that will allow Facilities Services staff to track and manage jobs will be available in a new application within Maximo – the Jobs Application—which can be accessed within the “Financials” module.

What is a Job?

Jobs authorize the execution of projects requested by campus departments (Request for Services) or the execution of regular work performed for campus unit (standing work). Jobs perform a variety of functions but are used primarily to:

- Authorize the execution of work
- Track costs and expenditures for projects of standing work
- Accumulate costs such that they can be transmitted to central accounting to charge the departments requesting work
- Provide means of accruing costs for various reports and productivity analysis

Maximo will support two distinct categories of jobs – those authorized for Small Projects and those for Standing Work – each with their own specific business rules for how they will be administered within Maximo.
Projects in Maximo

Project jobs will be created to enable the execution of small project work that is typically requested in an RFS (Request for Service). These jobs often have a predefined scope of work, and may contain associated budgets or cost estimates. Jobs of this type will enforce specific business rules that will govern how the project is administered within Maximo.

Summary:

1. A job record is created within the Jobs application that describes the scope of work requested and by whom, the Administrative Unit (enterprise) that will administer the job, who is responsible for managing the work, the expense account that will be charged for the work performed, and billing flags that determine if and how the charges will be billed.

2. Jobs used to track project work will have one or more associated “small project” work orders. Work orders are created by an RFS Administrator or members of the Lead Shop to authorize certain work groups (shops / departments) to initiate work against the job. Each work group will report actuals and work performed against their work order, and is responsible for completing their own work order after their scope of work has been executed.

3. Work plans containing estimates for labor, material, or expected services for a given work group are applied to their work order. Cost roll-ups for actuals, estimates, and variance are available at the work order and job level.

Note: Service Requests and Preventive Maintenance (PM) schedules cannot be initiated against jobs of this type. Only the RFS Administrator and/or members of the Lead Shop can authorize groups to execute work against the job.
**Standing Jobs in Maximo**

Standing jobs will not be used to track small project work, but will be created to enable regular work to be performed for departments, such as corrective or preventive maintenance. Jobs used to track standing or ongoing maintenance may have several service requests or work orders associated to it. Jobs of this type are similar to what we previously referred to as a “SWO” in JCS, but have enhanced capabilities to allow an administrator to restrict the type of work that is tracked against it.

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2. Standing jobs authorized for Preventive Maintenance (PM) work will require the existence of a PM schedule and/or preventive maintenance work order before services can be performed against the job.

3. Standing jobs authorized for corrective maintenance (CM) work will require the existence of a Service Request before services can be performed against the job.
The Jobs Application

The Jobs application can be access through the “Financials” module within the system’s “Go To” menu. Within this application users will be able to create, administer, search for, and report on jobs information according to their security access and data privileges.

Application Tabs

The application will contain a number of application “tabs”, which will appear at the top of the page’s working section. These tabs will provide users with various functions and often organize and display data according to logical groupings of information.

List Tab: The list tab appears first in the application, and contains a number of data filters and navigation buttons to enable users to search for and display job records within the table window.

Job Tab: The jobs tab will display basic information for a job record, such as requester, scope of work, facility data, account and billing specifications, and open/close dates.

Related Records: The related records tab will display any service request or work orders that report against the job record.

Actuals Tab: The actuals tab displays all labor, material, service, or tool transactions that were reported against the job.

Estimates Tab: The estimates tab displays a summary of any labor, material, services, and/or tool estimates that were recorded against work orders that report against the job record. If the user does not have administrative unit access to view fixed price actuals data, the Estimates tab will be displayed in place of the “Cost” tab.

Costs Tab: The costs tab displays a summary of the cost estimates, actuals, and variance for labor, material, services, or tools that are recorded against work orders that report against the job record. This tab will not be viewable against fixed price jobs where the user does not have administrative unit access to the job.

Commitments tab: The commitments tab displays a summary of open requisitions and commitments (Maximo Purchase Orders) that have been recorded against work orders pertaining to the job record.

Billing Tab: The billing tab displays a summary of the total amount billed and unbilled against the job by work group (shop).
Navigating the Jobs Application

The Jobs application can be accessed from within the Financials module. To open the Jobs application in Maximo:

1. From the Go To menu, select “Financials” and then click “Jobs”.
2. Maximo will open the Jobs application and direct you to the “List” tab.

Searching for Jobs

There are a variety of different ways to search for a job record(s).

To search for a single job record using the Quick Key Search:

1. From the Maximo tool bar, enter the job record ID into the quick key search field.
2. Click Enter to query and open the job record.

To search for a job record from the List tab:

1. From the List tab, enter search parameters into the available filter fields. Note: Some fields may have a Select Value lookup to allow you to display a dialog box showing available/eligible values.
2. Click Enter or select the icon to filter the List table window.
3. If there are no rows to match your filter criteria, a message displays in the table window. (eg ...No rows to display...).
4. To filter using different criteria, click the Clear Filter Fields to return to the original result set.

To search for a job record using the Advanced Search menu:

1. From the List Tab, click the Advanced Search located on the navigation menu bar. The “More Search Fields” dialog box will appear.
2. Enter or select a value(s) in the available search fields.
3. Click Find to perform the search.
4. Maximo will display the search results in the List tab table window.
5. If there are no rows to match your filter criteria, a message displays in the table window (eg No work orders found)

Viewing Job Records

To view details of a job record that you have queried and displayed in the List tab table menu:

1. Open the job record by clicking on the underlined job record ID (eg 10001) form the table menu.
2. The record will open to the [Job] tab.
3. Click on the various other application tabs at the top of the page’s working area to view additional jobs data and information.
**Bookmarks**

You may bookmark a job record in order to quickly access it later.

To bookmark a record:

1. Open the job record that you would like to bookmark.
2. From the “Select Action” menu located on the Maximo toolbar, select **Add to Bookmarks**
3. Maximo will add the record to the “My Bookmarks” dialog.

To retrieve your bookmarked records:

1. From the List tab, click **Bookmarks**
2. Maximo displays the “My Bookmarks” dialog box containing the jobs that have been bookmarked.
3. Click on the underlined ID of the job you want to display (100001)
4. Maximo will open and display the selected job record.

**Query Menu**

The Query Drop Down menu located on the Maximo toolbar contains a list of public or private queries that have been saved within the application. It also contains 2 additional search options: “All Records” and “All Bookmarks”. If you select a query from this menu, Maximo executes it immediately and displays the results in the List tab table window.