

Insular ABC's EAMS Training Guide

Data Entry Training Guide

July 2021



Decision Support Tool

User: MAXADMIN

Location count by Location Type

Location Type	Count
4125	~50
4127	~280
4142	~20
4165	~50
4183	~50

FCI by Location Types

DM
CRV
FCI

Show All Locations

Summary

Region	Locat...	FCI	DM	CRV
U.S. Vir...	185.0	0.2091	\$42.463m	\$203.116m
U.S. Vir...	19.0	0.2615	\$4.188m	\$16.018m
U.S. Vir...	378.0	0.1343	\$21.525m	\$160.325m
TOTAL	582.0	0.1952	\$68.18m	\$379.46m

Jane E. Tuitt Elementary School

Info

Total Locations: 9
Average FCI: 0.1580
Total DM: \$502.88k
Total CRV: \$3.18m

DM by Location Types

Show All Locations

Location Portfolio

DM
CRV
FCI

FCI Trend Graph



EAMS USER GUIDE

Data Entry Training Guide

July 2021

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1. Introduction

1.1 Login to EAMS

1. For the production site, open your browser and go to: <https://maximo.gdoe.net>
or
For the development site, open your browser and go to: <https://maximotest.gdoe.net/>
2. Enter your username and password, and click on **Sign In**.

2. Locations

2.1 Creating a Location

To create a location, begin at the **Start Center** screen. If you need to return to the start center at any time, click on the **home icon** at the top left of the screen.

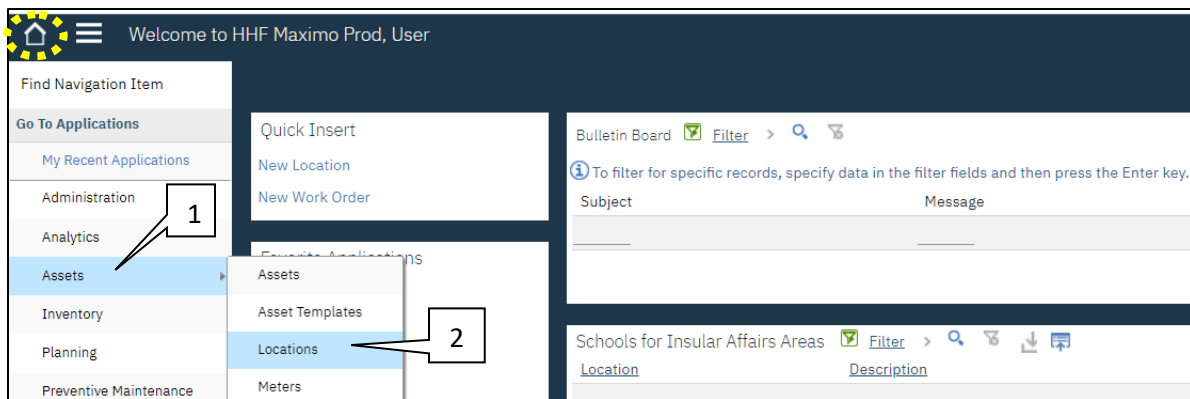


Figure 1: Start Screen

1. Hover over **Assets** from the navigation pane on the left side of the screen.
2. Select **Locations**.

You will be taken to the list view page of the **Locations** application.

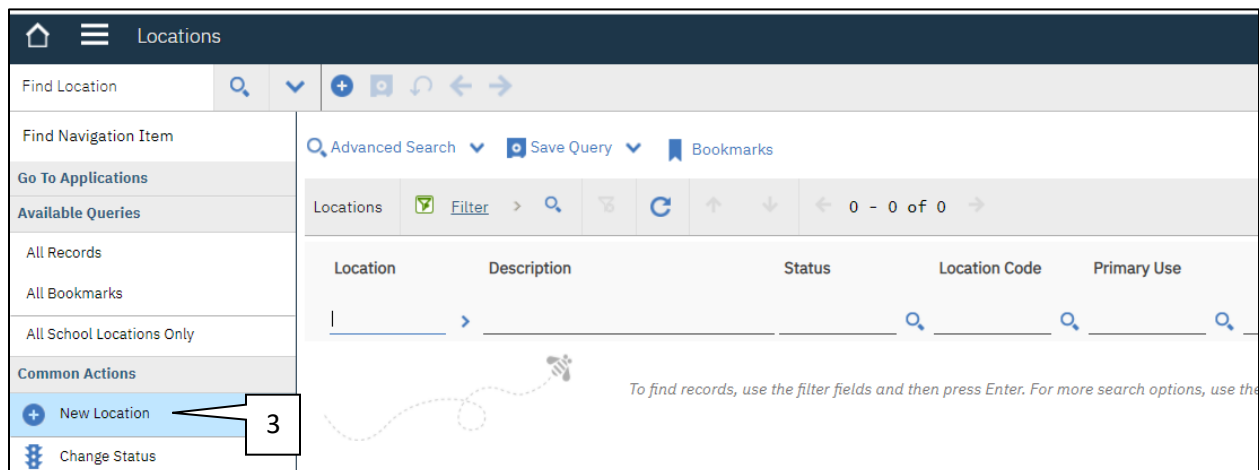


Figure 2: Locations List View Page

3. Click on the **New Location** icon.

You will be taken to the **Locations** page of the Locations application.

The screenshot shows the 'Locations' application interface. At the top, there is a search bar labeled 'Find Location' and a navigation menu with tabs: 'List View', 'Location', 'Assets', 'History', 'Safety', 'Meters', 'Specifications', 'Service Address', and 'Map'. The main form is divided into several sections:

- Location Details:** Includes fields for 'Location:' (callout 4), 'Type:' (callout 6), 'Location Code:' (callout 7), 'Primary Use:' (callout 8), 'Rotating Item:', 'Meter Group:', 'Calendar:', and 'Shift:'. To the right, there are fields for 'Site: AS01031', 'Insular area: American Samoa', 'Island: Tutuila', 'Priority:', 'Failure Class:', 'GL Account:', and 'Internal Labor Account:'. On the far right, there are 'Attachments' and 'Status: OPERATING'.
- Details:** Includes fields for 'Acquisition Cost:', 'Acquisition Date:', 'Year Built:', 'Occupant:', 'Occupied?' (checkbox), 'API:', 'Facility Condition Index:', 'Current Replacement Value:', 'Deferred Maintenance Costs: 0.00', 'Condition Ranking:', 'Unit of Measure:', 'Unit of Measure Quantity:', 'Ownership:', 'Maintenance Resp.:', and 'External Reference ID:'.
- Address Information:** Includes fields for 'Service Address:', 'Formatted Address:', 'Street Address:', 'City:', 'State/Province:', and 'Ancestor's Address:'.

Figure 3: Locations Page

4. Enter location code for the record. Use the predetermined nomenclature for consistency (e.g., VI0103101: VI = territory code; 01 = island code; 031 = school code; 01 = building code).

5. Enter location descriptive information.

Examples: "NE Section of Roof, Room 132-B, or Security Gate 10".

6. Select the Location **Type** (operating).

7. Select the **Location Code**.

8. Select the **Primary Use** of the location.

9. Enter any other information you may have about this location.

10. Click on the **Save** icon.



Figure 4: Save Icon

2.2 Classifying a Location

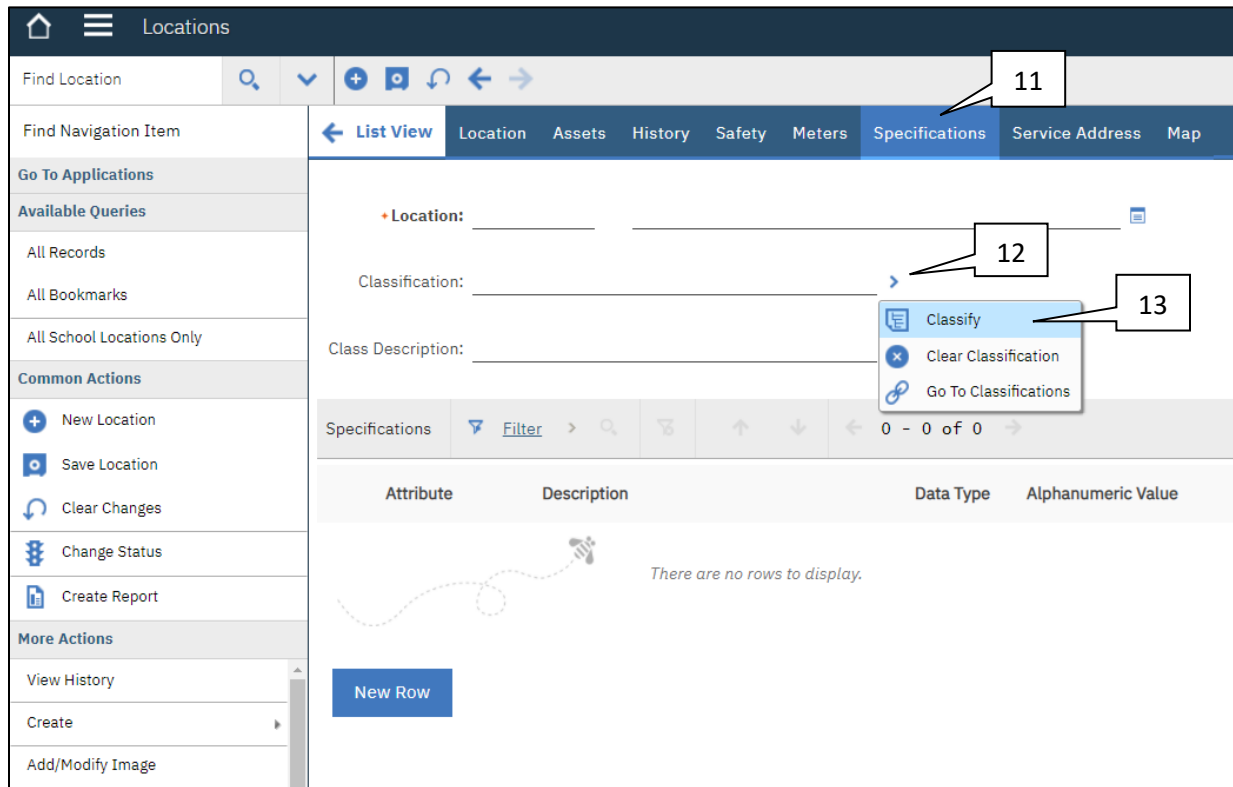


Figure 5: Specifications Tab

11. Select **Specifications** tab.

12. Click on the > icon.

13. Select **Classify**.



Figure 6: Classify Window

14. Select the classification by clicking on the **classification type**.

15. Click on **Save** icon.



Figure 7: Save Icon

The **location** has been created with a **classification**.

2.3 Adding Children to Parent Locations

16. Go to the **parent location**.

- If the newly created location is a building, its parent is the school it belongs to.
- If the new location is a room, its parent is the building its in.

17. Navigate to the bottom of the **Location** page to **Children** section.

18. Click on **New Row**.

19. Under **Details**, click on > icon next to **Location** field.

20. Click on **Select Value** to choose the primary name of the child location.

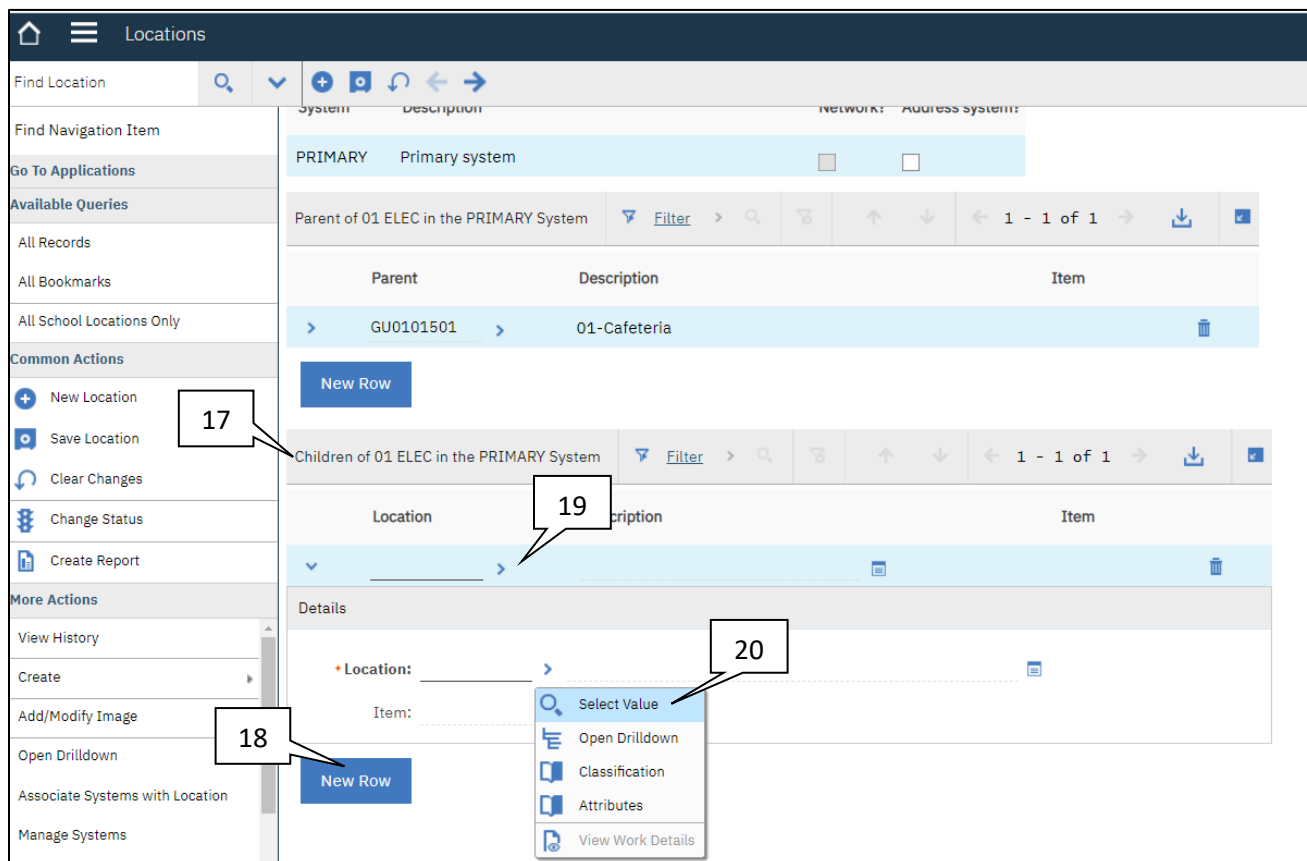


Figure 8: Children Section

21. Click on **Save** Icon.

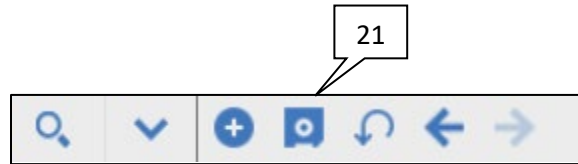


Figure 9: Save Icon

3. Assets

Assets are facility components that are monitored for repair or replacement, (e.g., roofs, mechanical and structural systems, etc.).

3.1 Creating an Asset

To create an asset, begin at the **Start Center** screen.

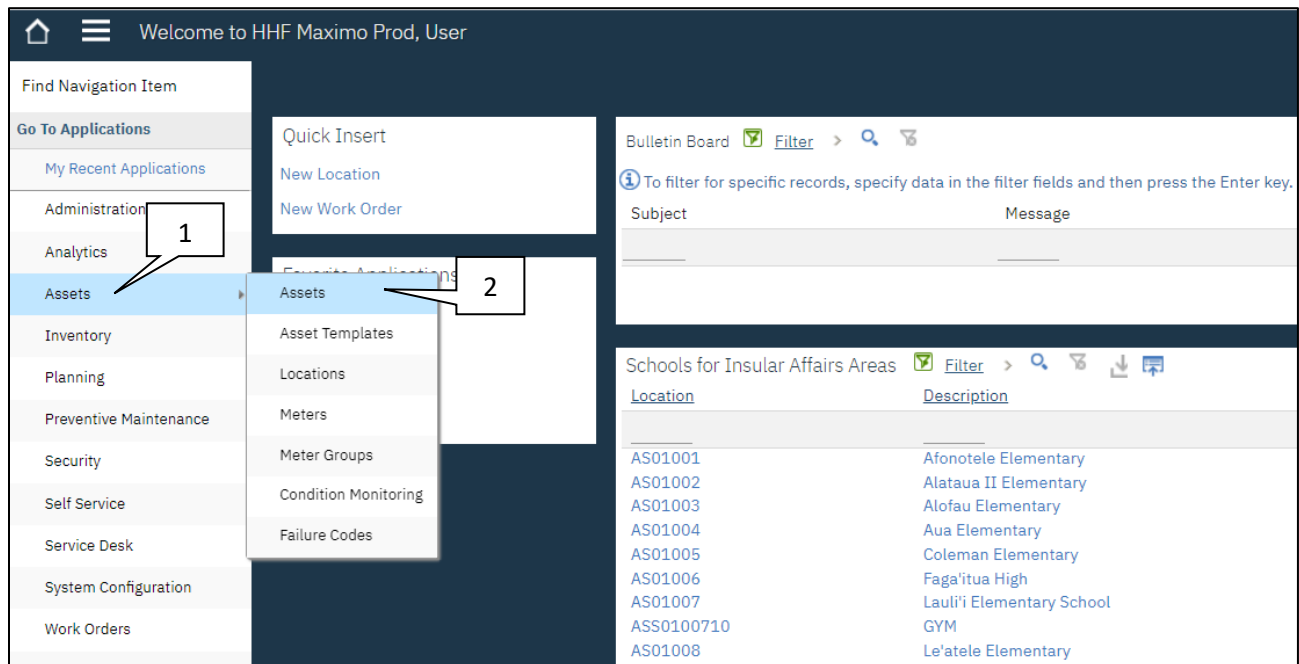


Figure 10: Start Center Screen

1. Hover over **Assets** on the navigation pane on the left side of the screen.
2. Select **Assets**.

You will be taken to the list view page of the **Assets** application.

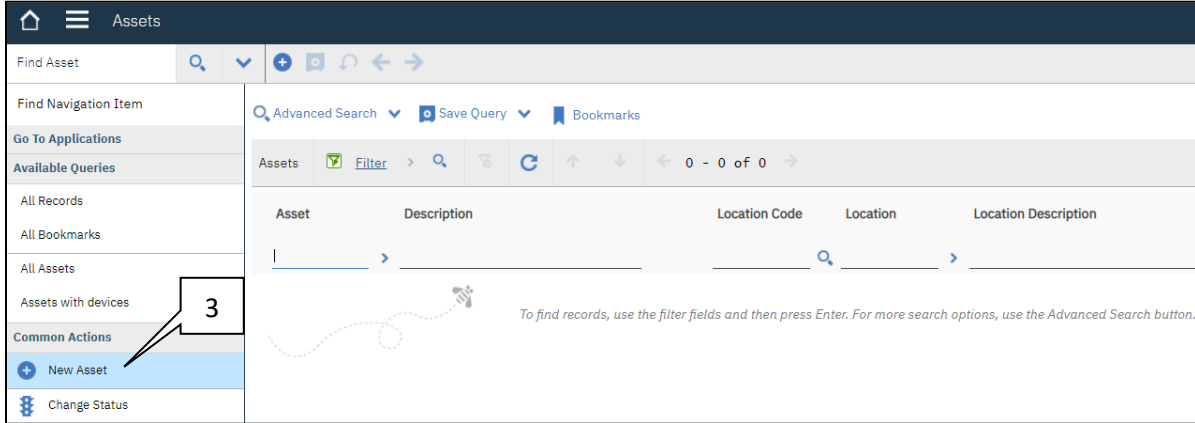


Figure 11: Assets List View Page

3. Click on the **New Asset**.

You will be taken to the **Assets** page of the Assets application.

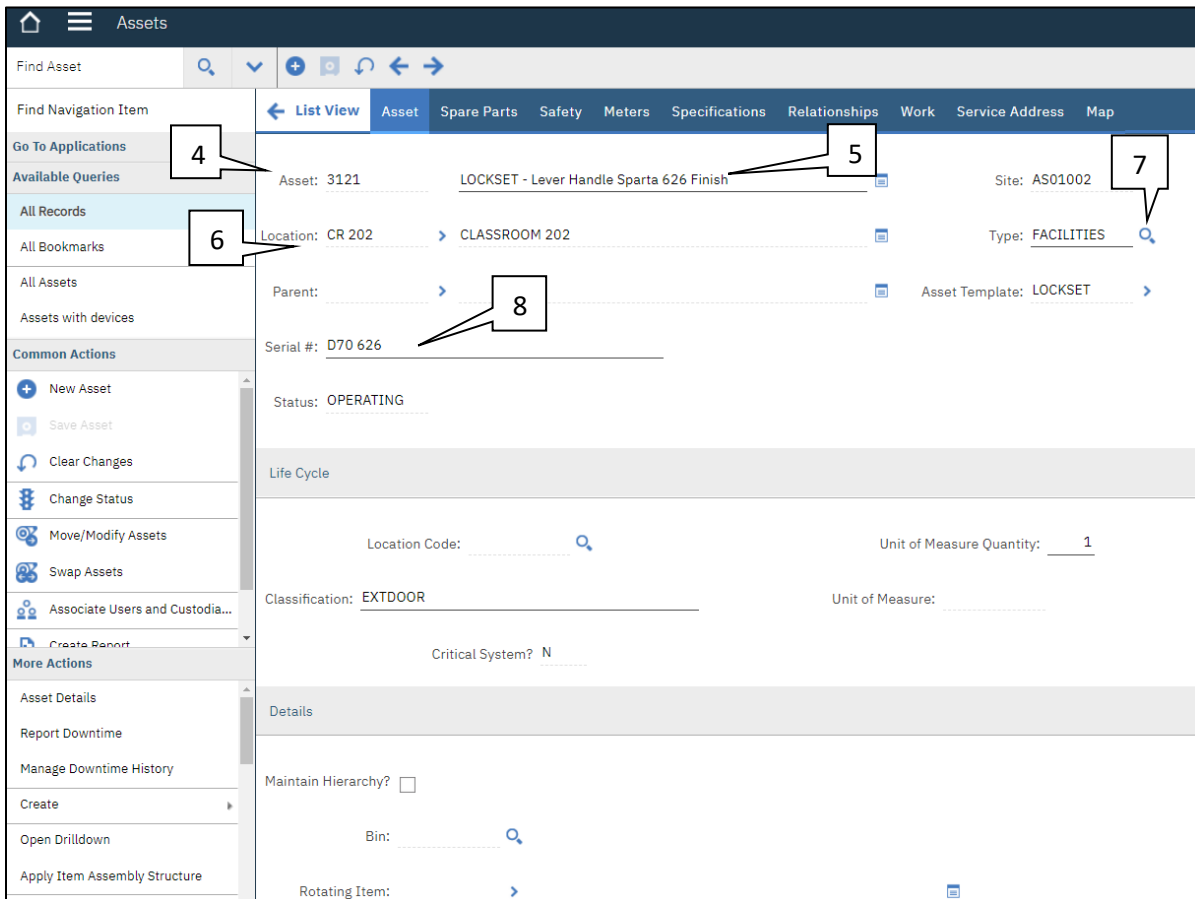


Figure 12: Assets Page

4. An **asset number** is automatically generated for the record.
5. Enter **descriptive information** for the asset.
6. Select the **Location** where the asset is physically located or installed.
7. Select **Facilities** for the asset **Type** by clicking on the **magnifying glass** next to the **Type** field.
8. Enter the asset's **Serial Number** (if known and available).
9. Scroll down to the **Purchase Information** section and enter the asset's **Manufacturer** and **Vendor**.
10. Enter any additional known information such as **Installation Date** and **Expected Life**.
11. Enter the asset's **Purchase Price** and **Replacement Cost** (if known).

The screenshot shows the 'Assets' application interface. The left sidebar contains navigation and action items. The main content area is divided into sections: 'Address Information', 'Purchase Information', and 'Costs'. The 'Purchase Information' section includes fields for Vendor, Manufacturer, Installation Date, Expected Life, Estimated EOL, Purchase Price, and Replacement Cost. The 'Costs' section includes fields for Total Cost, YTD Cost, Budgeted, Inventory, and Current Value. Callout boxes 9, 10, and 11 point to the Vendor, Installation Date, and Purchase Price fields respectively.

Figure 13: Purchase Information Section

12. Click on the **paper clip** next to **Attachments** (located on the right side of the screen), to attach documents regarding **warranty** or **maintenance** information.
13. Click on the **Save** icon.

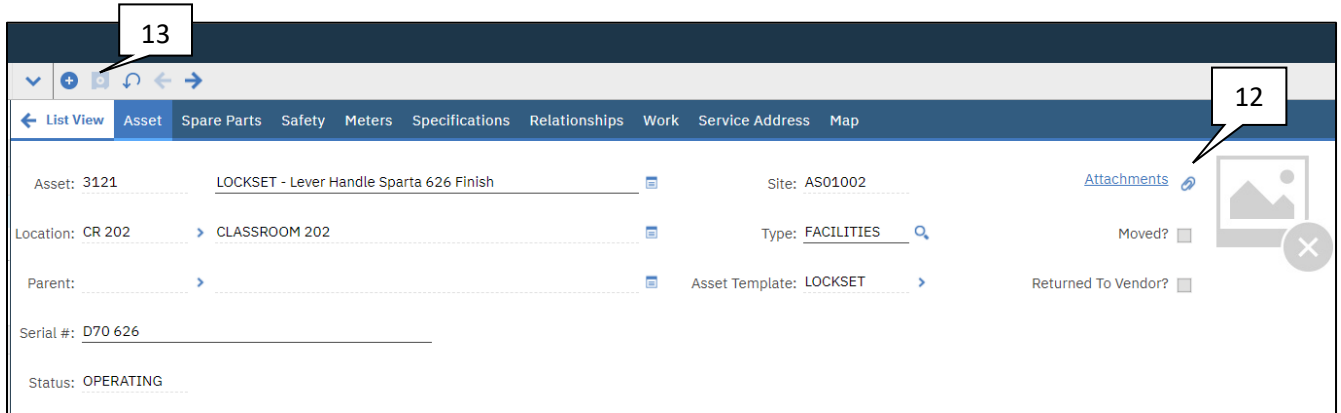


Figure 14: Attachments

3.2 Classifying an Asset

14. Select **Specifications** tab.
15. Click on the > icon, next to **Classification** field.
16. Select **Classify**.

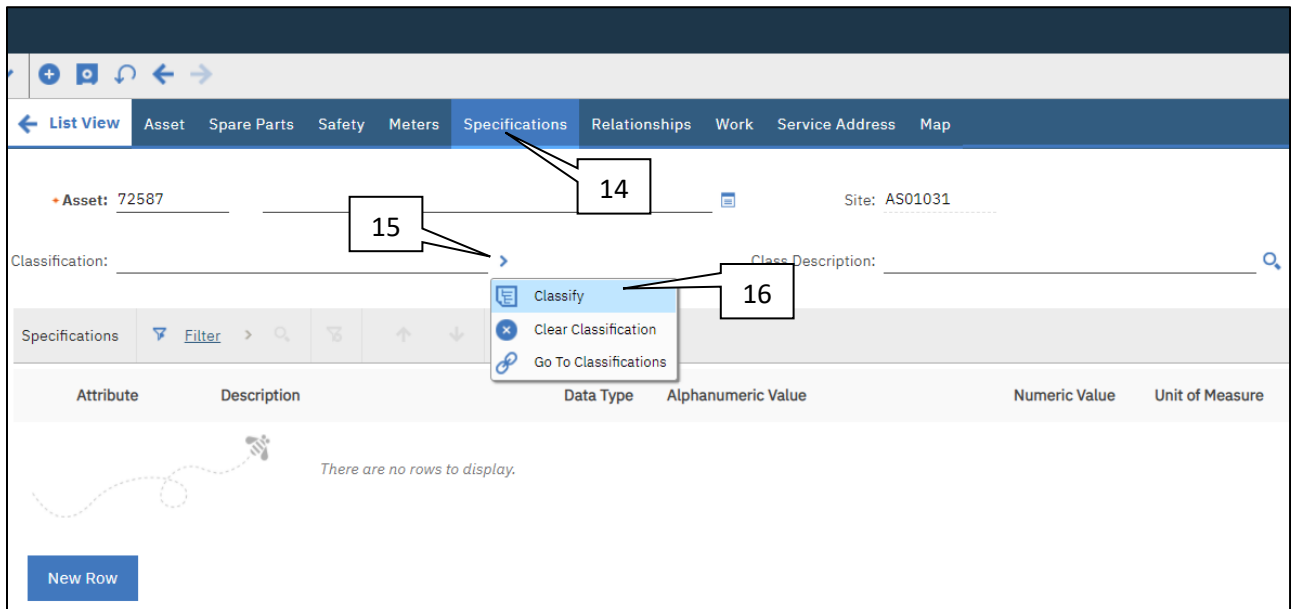


Figure 15: Specifications Screen

The **Classify** window opens.

17. Select the **classification** by clicking on the **icon** next to the classification.

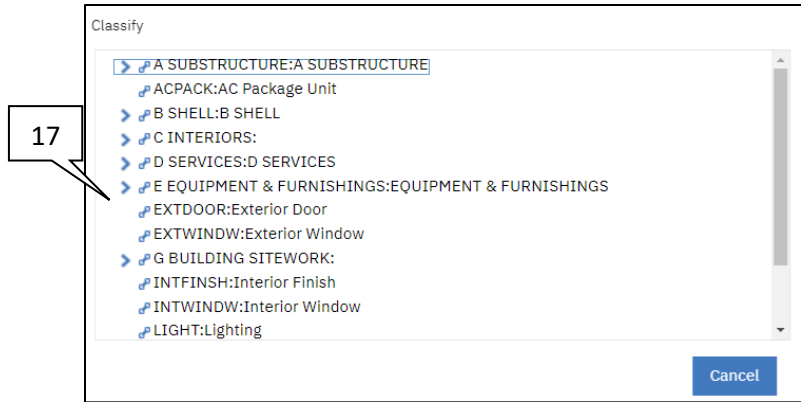


Figure 16: Classify Window

18. Click on **Save** Icon.

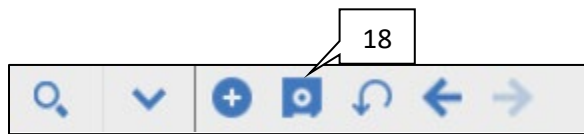


Figure 17: Save Icon

The **asset** has been created with a **classification**.

3.3 Adding Specifications to an Asset

- 19. To add **specifications** to an asset, click on the **Specifications** tab.
- 20. Click on **New Row** to add new specifications for the asset.
- 21. Click on the **magnifying glass** next to **Attributes** to select values.

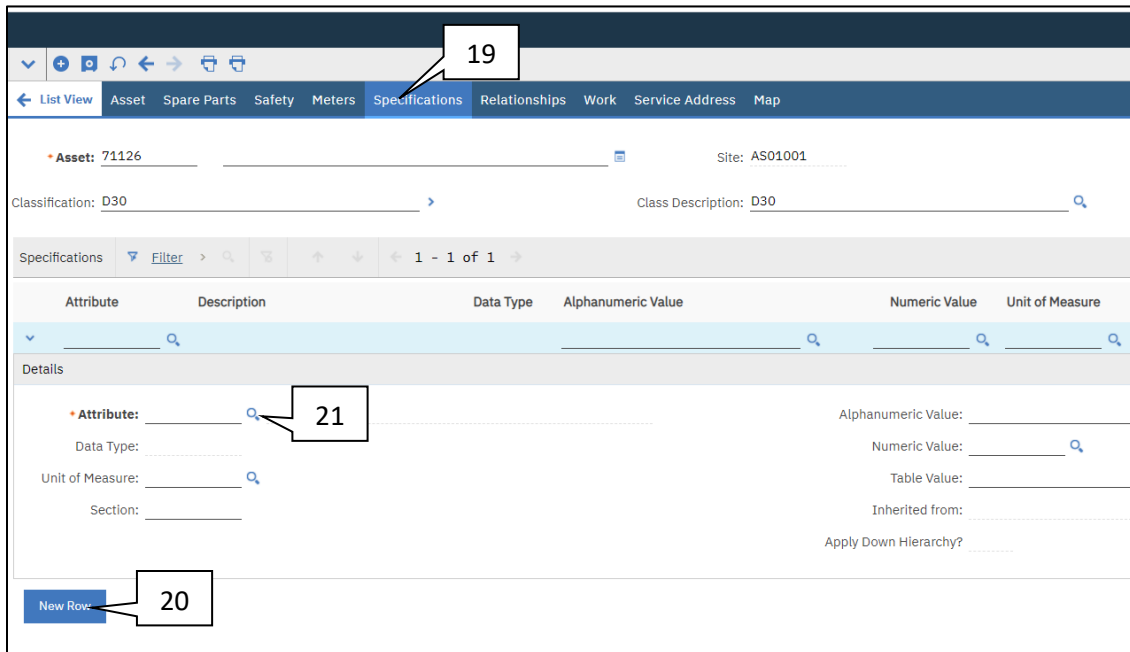


Figure 18: Specifications Tab

Figure 19 shows an asset with specifications set up.

22. To add asset information to the listed specifications, click on the *magnifying glass* next to the fields you would like to add the information to.

Asset: 2806 D SERVICES,HVAC,Terminal & Package Units,Package Units Site: AS01002

Classification: D SERVICES \ D30 \ D3050 \ D3052 Class Description: D3052 Package Units

Specifications Filter 1 - 9 of 9

Attribute	Description	Data Type	Alphanumeric Value	Numeric Value	Unit of Measure
> ACPCOOL	AC Package Unit Condenser Type	ALN			
> ACPHEAT	AC Package Unit Heating Type	ALN			
> BTU	BTU	NUMERIC			BTU
> ACPTON	ACPackage Unit Cooling Tonnage	NUMERIC			TON
> COMMENT	Comments	ALN			
> DESCOMT	Description Comment	ALN			
> MANUFACT	MANUFACTURER	ALN			
> MODEL	Model	ALN			
> TAG_REPL	Tag Replacement Number	ALN			

New Row

Figure 19: Specifications

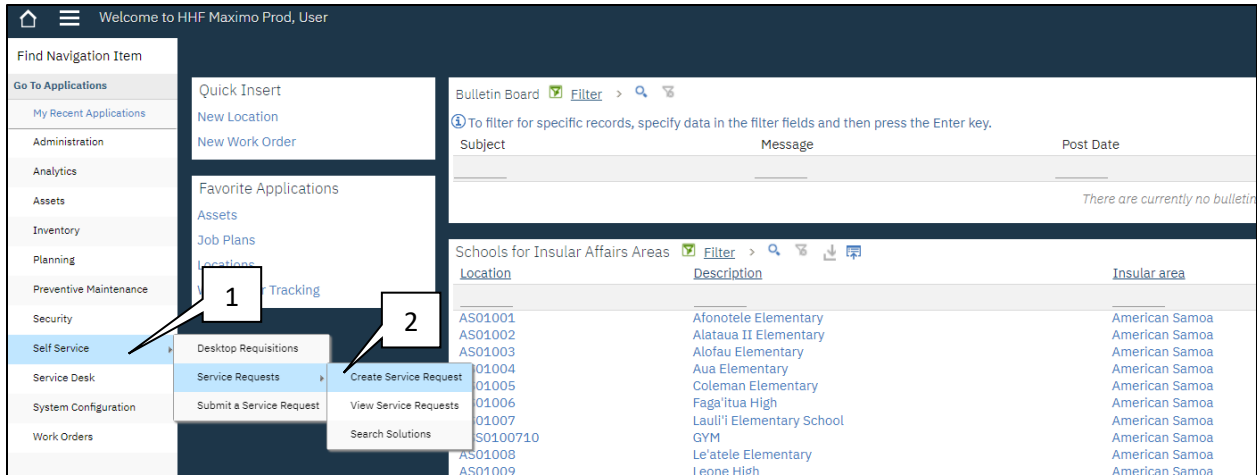
4. Service Requests

Service requests are trouble calls submitted by schools that involve an asset or location. Ideally, they are reduced over time as regular preventive maintenance tasks are conducted and known deferred maintenance (DM) is addressed. Service requests are managed in the Maximo Service Requests application.

4.1 Creating a Service Request

To create a service request, begin at the **Start Center** screen.

1. Hover over **Self Service** and then **Service Requests** on the navigation pane on the left side of the screen.
2. Select **Create Service Request**.



You will be taken to the **Service Requests** application.

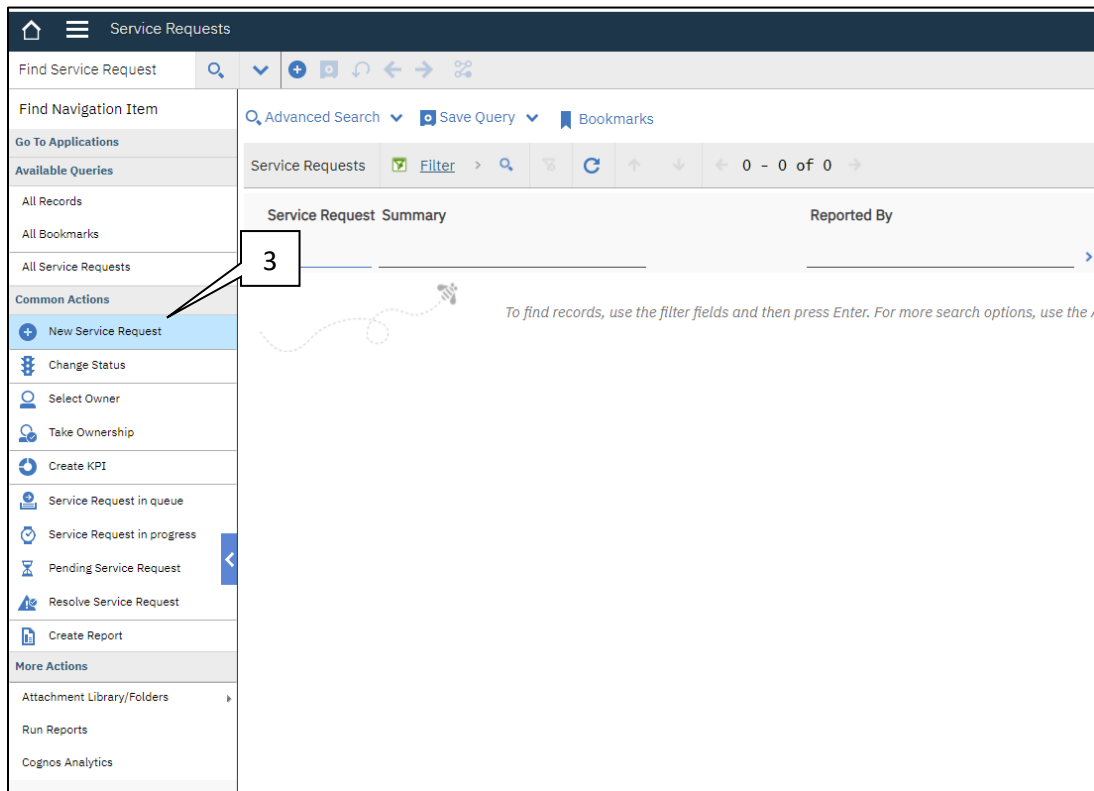


Figure 20: Service Requests Application

3. Click on **New Service Request**.

You will be taken to the **new service request form**.

4. Refer to **Figure 22**. Some of the fields are automatically populated. Fill in the remaining fields with as much relevant information as you have.

The screenshot displays a 'New Service Request Form' with the following sections and fields:

- Service Request:** Service Request: 1475, Owner: _____, Owner Group: _____, Status: NEW, Work Completed Confirmed By: _____, Date: _____, Confirm, Clear, Attachments
- Address Information:** Service Address: _____, City: _____, Formatted Address: _____, State/Province: _____, Street Address: _____
- User Information:** Reported By: DAYNAV, Affected Person: DAYNAV, Name: User, Phone: _____, E-mail: _____
- Service Request Details:** Summary: _____, Classification: _____, Class Description: _____, Reported Priority: _____, Internal Priority: _____, Service Group: _____, Service: _____, Vendor: _____, Service Group: _____, Service: _____, Vendor: _____, Site: _____, SLA Applied? , Create WO Options: MULTI
- Dates:** Reported Date: 6/17/21 12:51 AM, Actual Contact: _____, Target Contact: _____, Is Global Issue? , Affected Date: 6/17/21 12:51 AM, Actual Start: _____, Target Start: _____, Global Ticket: _____, Actual Finish: _____, Target Finish: _____, Global Ticket Class: _____
- Global Issues:** Global Issues
- Multiple Assets, Locations and CIs:** Filter, 0 - 0 of 0, Asset, Location, Configuration Item, Target Description, Sequence, Mark Progress?, Site, There are no rows to display.
- Time Tracking:** Filter, 0 - 0 of 0

Figure 21: New Service Request Form

5. Click on the **Save** icon.

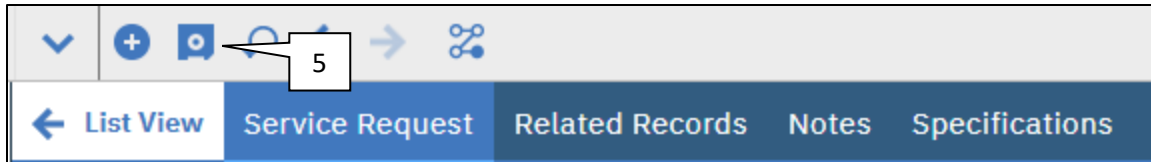


Figure 22: Save Icon

A new **service request** has been created.

5. Work Orders

The Work Orders module is used to track the work that has been performed in the past, and future work that is being planned. A work order specifies a task, the labor, materials, services, and tools needed to complete the task. When a work order is created, the maintenance management process is initiated, and a historical record of the work requested and performed is created.

Work orders can be created for a variety of project types, such as planned repair or reinvestment projects and can range from specific assets to school-wide renewal.

The information that is contained on a work order includes the following:

- The tasks that were performed
- The labor hours involved in performing the work
- The services used (if any)
- The materials used (if any)
- The tools required to do the work
- The assets worked on
- The locations where the work was performed

You can add work plans, job plans, or safety plans to a work order. You can also record planned tasks and costs, followed by actual costs as the work progresses.

5.1 Creating a Work Order

To create a work order, begin at the **Start Center** screen.

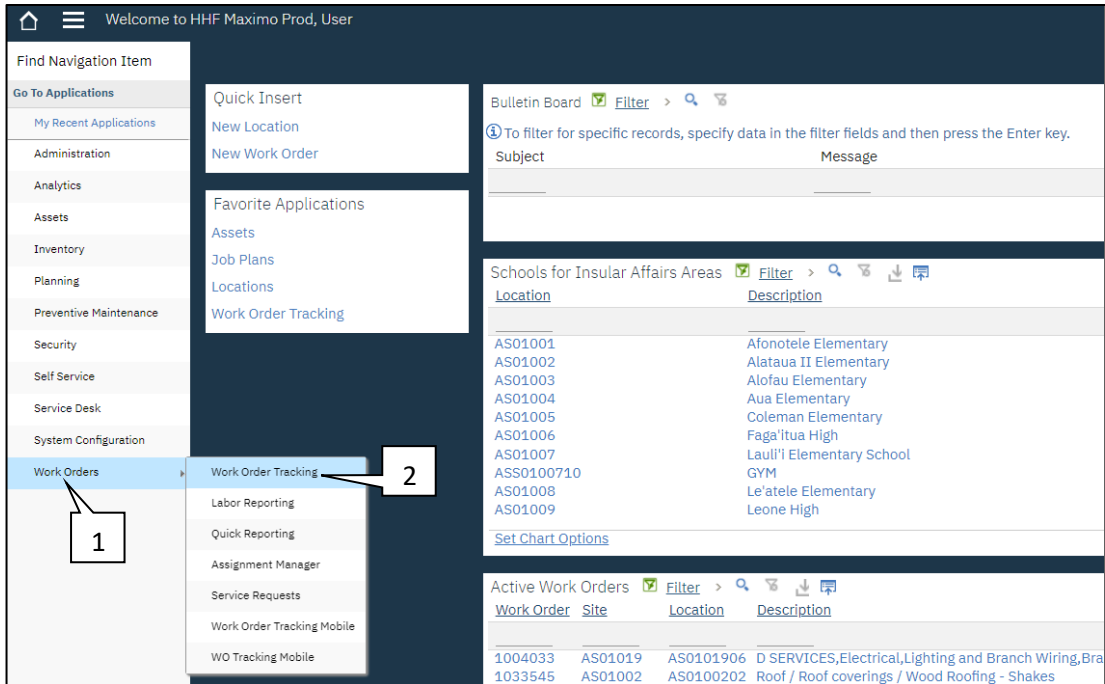


Figure 23: Start Center Screen

1. Hover over **Work Orders** on the navigation pane on the left side of the screen.
2. Select **Work Order Tracking**.

You will be taken to the list view page of the **Work Order Tracking** application.

1. Click on **All Records**.

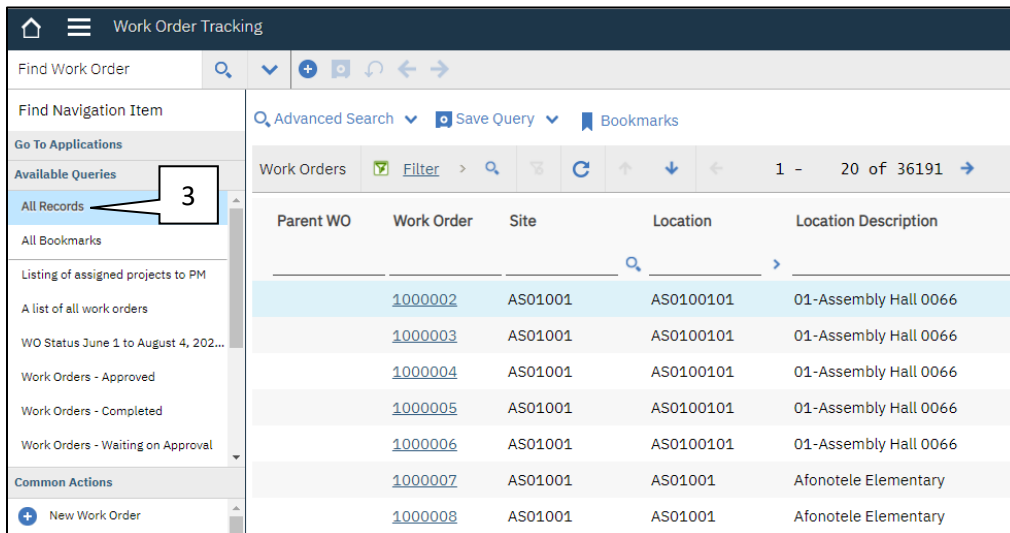


Figure 24: Work Order Tracking List View Page

2. Click on **New Work Order**.

You will be taken to the **new Work Order form**. Some of the fields are automatically populated. Fill in the remaining fields with as much relevant information as you have.

5. Click **Save**.

The screenshot shows the 'Work Order Tracking' application interface. At the top, there is a navigation bar with the title 'Work Order Tracking' and a search bar. Below this is a 'Find Work Order' search bar. The main area is titled 'Work Order' and contains various fields for creating a new work order. A callout box with the number '5' points to the top navigation bar, and another callout box with the number '4' points to the 'New Work Order' button in the sidebar.

Field	Value
Work Order	1034297
Site	AS01031
Class	WORKORDER
Location	
Asset	
Work Type	
Configuration Item	
Work Sub Type	
Parent WO	
GL Account	
Work Category	
Failure Class	
Work Activity	
Problem Code	
Is Health, Life, Safety?	<input type="checkbox"/>
Incident	
Rating	
Storeroom Material Status	
Project ID	
Direct Issue Material Status	
Critical System?	<input type="checkbox"/>
Work Package Material Status	
Estimated Cost	
Material Status Last Updated	
Phase 2 Cost Estimate	

Figure 25: New Work Order Form

A new **work order** has been created.

5.2 Creating a Work Package

When a work package is created, existing work orders are grouped under a new parent work order.

You can bundle current due, expected due, and deferred maintenance for a location or asset.

You also can include maintenance for related child and parent assets in the work package.

The eligible work orders to compound the package cannot be canceled, closed, or completed, and they cannot belong to another work package.

After you create a package, you can view its work orders on the Plans tab.

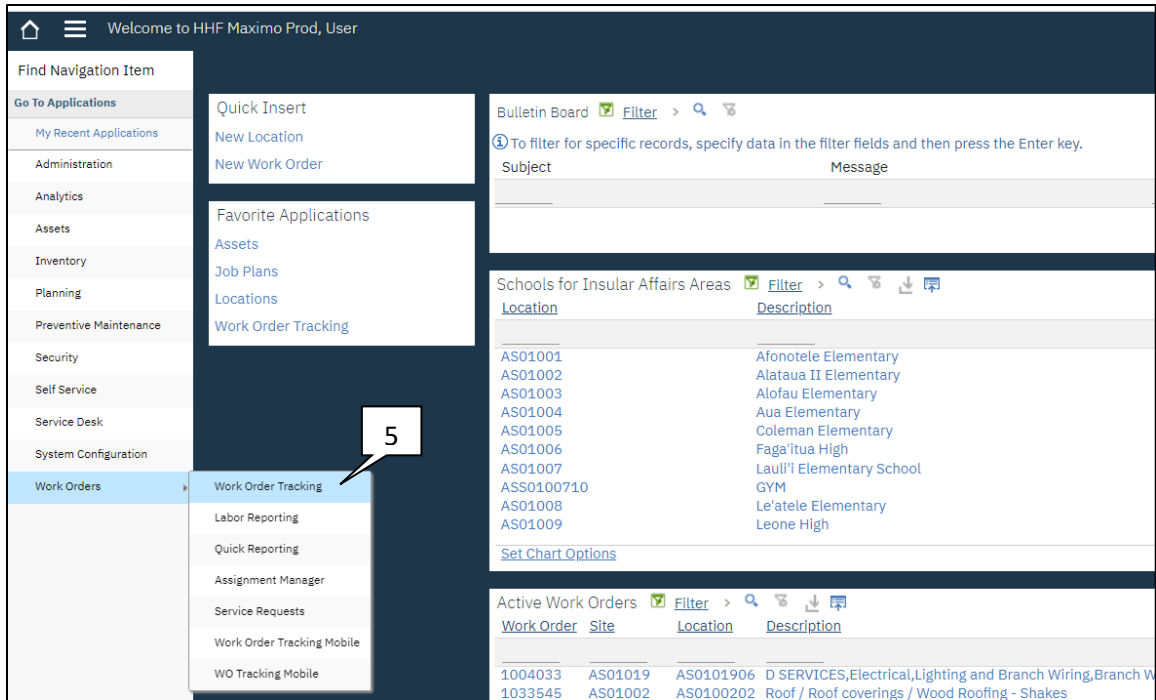


Figure 26: Start Center

- From the **Start Center**, hover over **Work Orders** and click on **Work Order Tracking**.
- Click on **All Records**.
- You will see the list view page of the **Work Order Tracking** application. **Filter** the work order list to include only the work orders that you want to combine into a work package. The work order list can be filtered by **site**, **location**, **work order description**, **owner**, **asset**, **status**, or any of the other fields located at the top of the list.

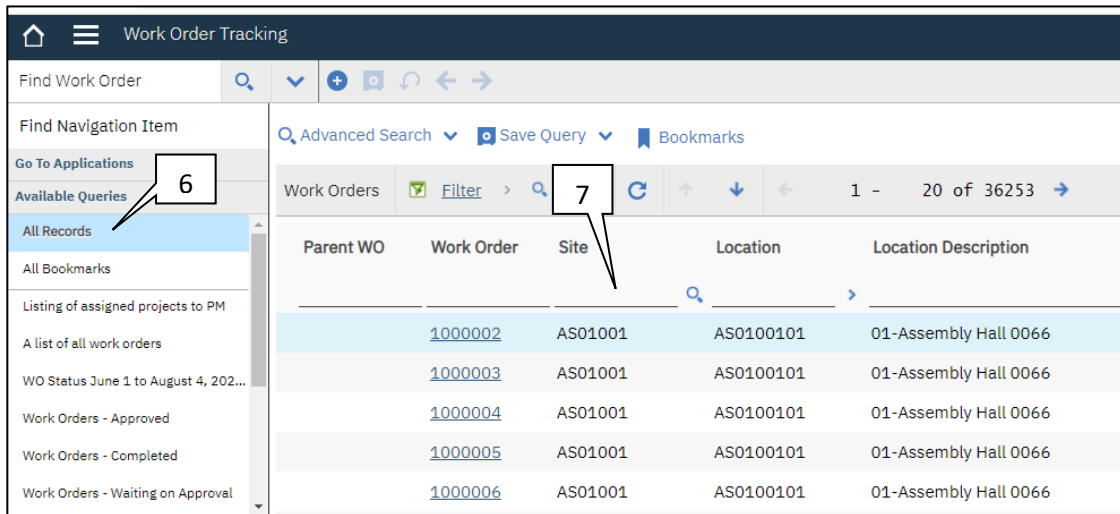


Figure 27: Work Order Tracking List View

A work package may only contain work orders at one school site. Multiple buildings may be included, but all must be at a single school.

If a project includes work at several schools, then you must create multiple work packages for each school site (costs should also be divided across respective schools for repair/CIP cost accounting and possible future geographic equity considerations).

- Use the checkbox **Select Records** to select all work orders that you want to include in a package.
- From the **More Actions** menu, select **Create Work Package**.

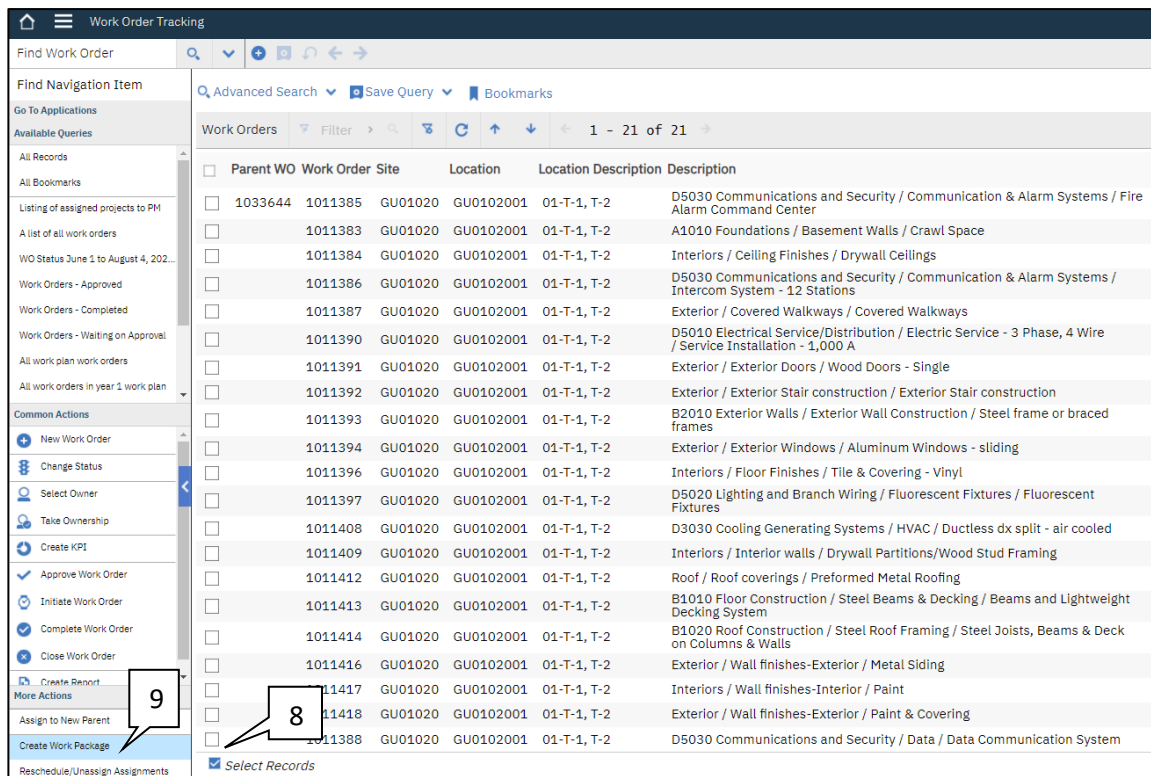


Figure 28: Work Order Tracking List View

- A system message window pops up and confirms which work orders were assigned to a parent work order. Click **Close**.

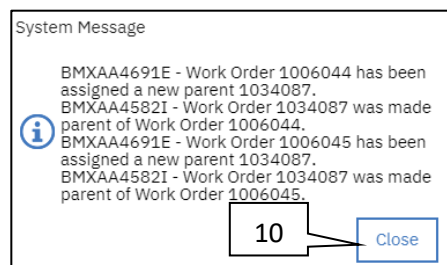


Figure 29: Example of System Message Window

9. The **new parent work order page** pops up. Fill in all relevant information you have.
10. Click **Save** icon.
11. Work orders in this work package can be viewed by clicking on the **Plans** tab.

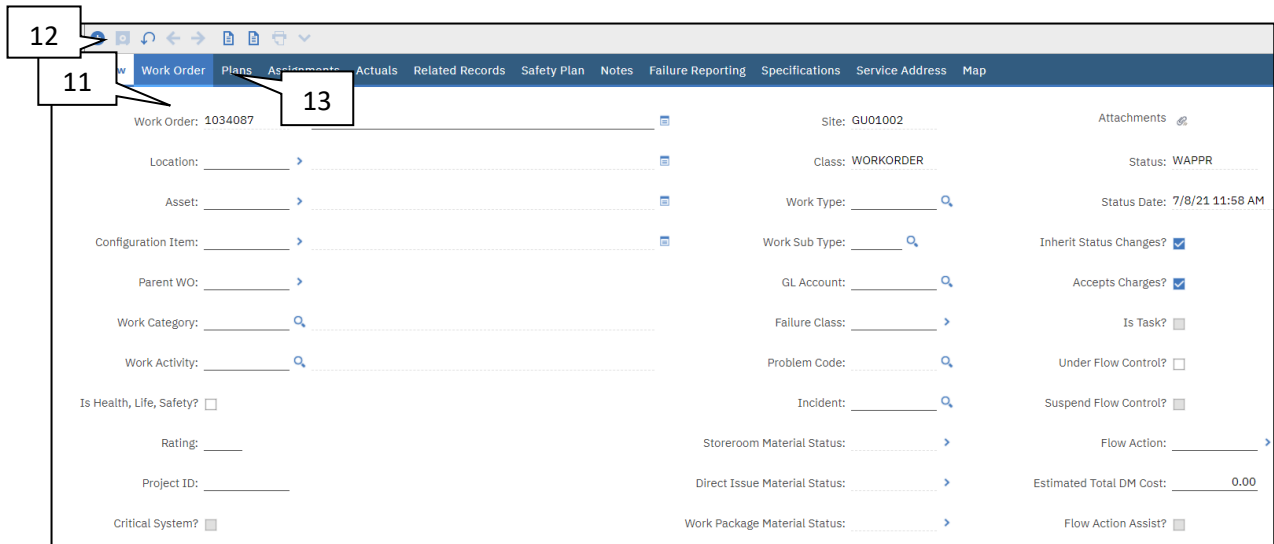


Figure 30: New Parent Work Order Page

A new **work package** has been created.

6. Preventive Maintenance Management

The Preventive Maintenance application can be used to assign regular tasks to in-house staff or contractors with a set frequency.

6.1 Setting up Preventive Maintenance

To set-up preventive maintenance (PM), begin at the **Start Center** screen.

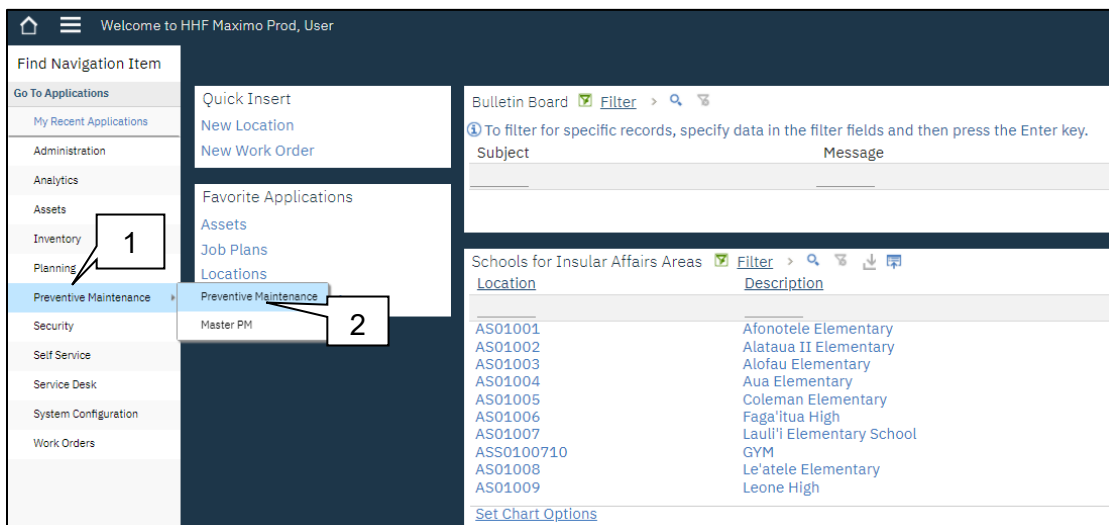


Figure 31: Start Center Screen

1. Hover over **Preventive Maintenance** on the navigation pane on the left side of the screen.
2. Select **Preventive Maintenance**.

You will be taken to the list view page of the **Preventive Maintenance** application.

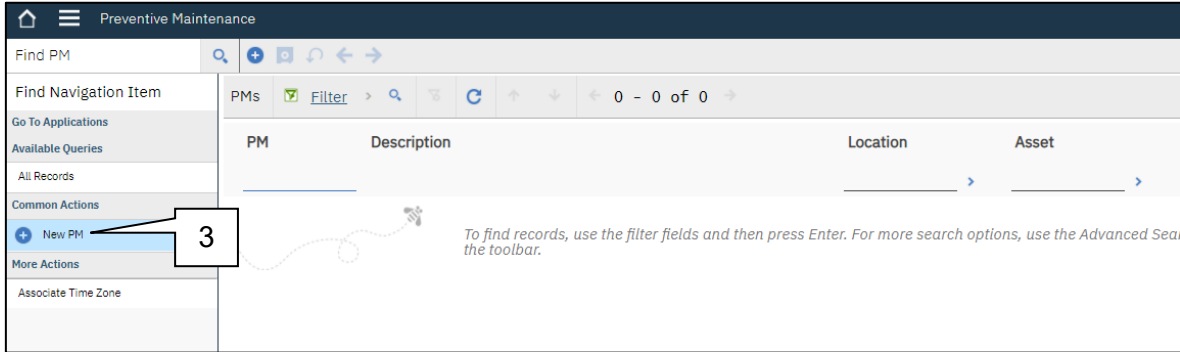


Figure 32: Preventive Maintenance List View Page

3. Click on **New PM**.

You will be taken to the **Preventive Maintenance** page of the Preventive Maintenance application.

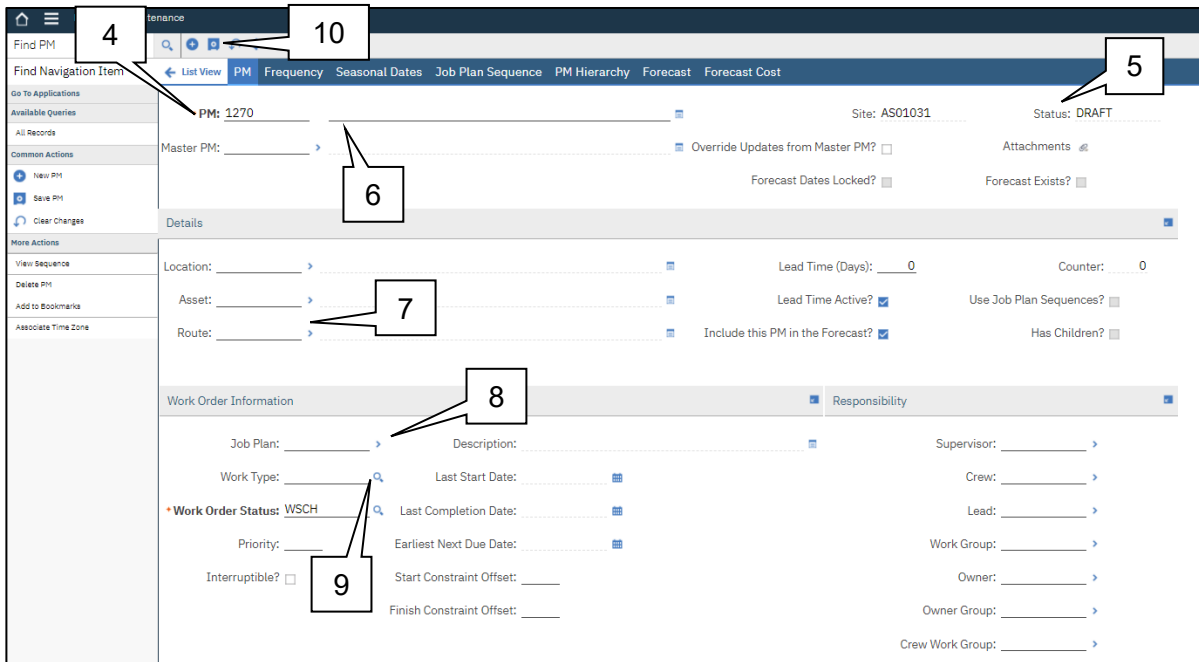


Figure 33: Preventive Maintenance Page

4. Maximo will automatically generate the **PM number**.
5. The **Status** of the PM will be **DRAFT** (in this status it cannot be used to generate any work orders).

6. Provide a ***description*** for the PM record.
7. Select the ***Location*** or ***Asset*** for the PM by clicking on the ***blue arrow*** next to it.
8. Select the appropriate ***Job Plan*** for the PM by clicking on the ***blue arrow*** next to it.
9. Set the ***Work Type*** to “PM” by clicking on the magnifying glass and selecting it.
10. Click ***Save***.
11. Click on the ***Frequency*** tab.

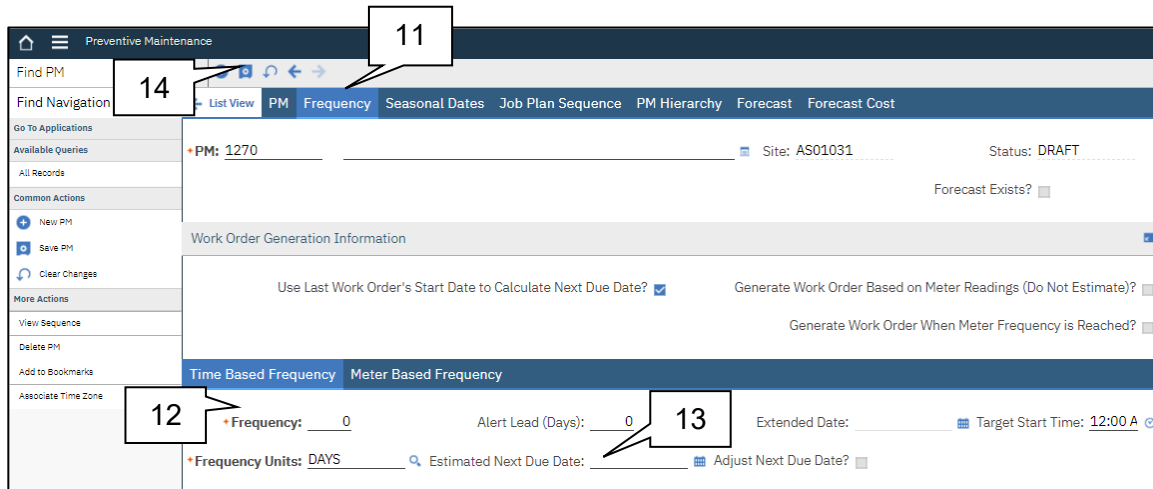


Figure 34: Frequency Tab

12. On the ***Time-Based Frequency*** sub-tab, enter the ***Frequency*** and ***Frequency Units***.
13. Enter the date the PM starts in the ***Estimated Next Due Date*** field.
14. Click ***Save***.

Note: The frequency specified should be the *most* frequent occurrence of the PM. For example, if the PM schedule for the asset requires “Monthly”, “Quarterly” and “Annual”, the entry in the ***Frequency*** field should be “1”, and the ***Frequency Units*** should be “MONTHS”. The additional frequencies will be added on the ***Job Plan Sequence*** tab.

6.2 Setting Seasonal Dates

If the PM activities occur during specific times of the year, you can use the ***Seasonal Dates*** functionality to automatically “turn on / turn off” the generation of PM Work Orders. The PM will only be active based on the ***Active Dates*** you provide. Additionally, you can specify days of the week on which the PM Work Orders will generate.

15. Click on ***Seasonal Dates*** tab.

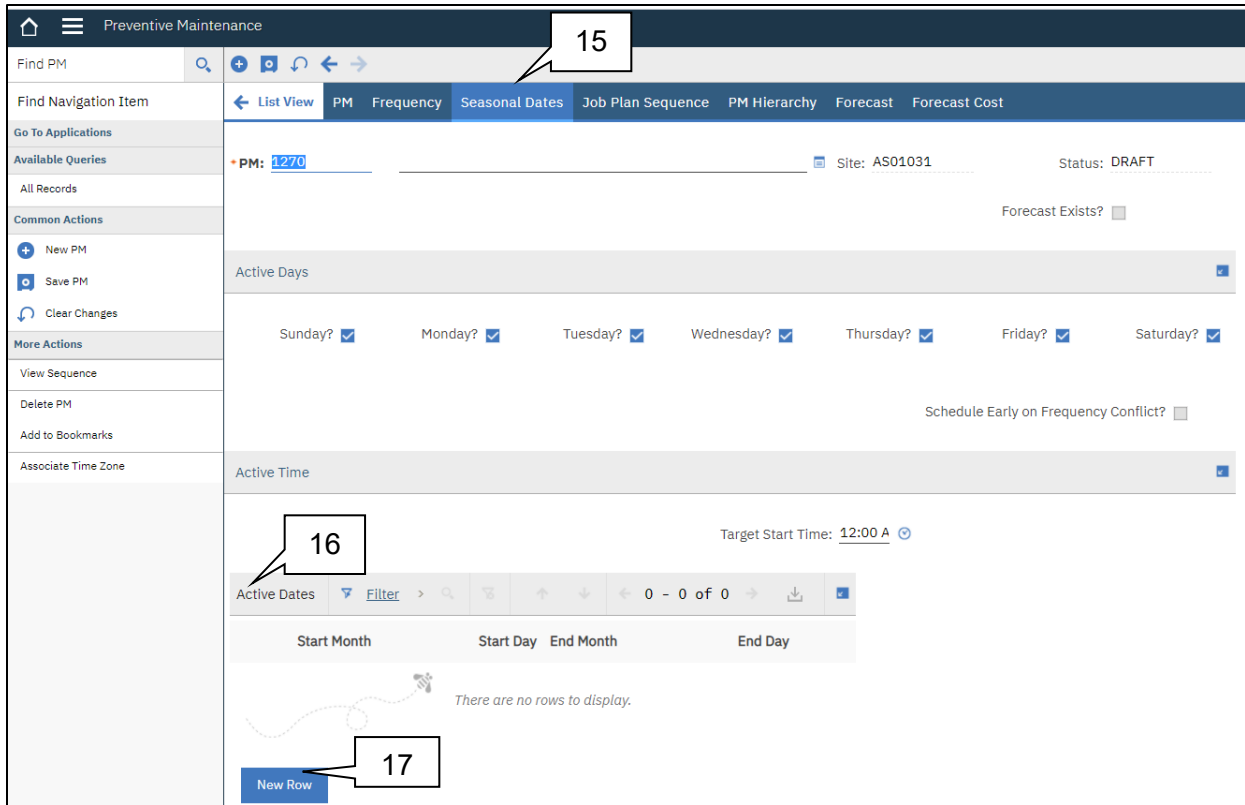


Figure 35: Seasonal Dates Tab

16. The **Active Days** lets you select what days of the week a PM can be generated. The default is for all days to be checked. Adjust as required.
17. Click **New Row** to add seasonal information.

Note: If seasonal dates are not specified, Maximo assumes the PM is always active. Only specify seasonal “*Active Dates*” if the PM activity is truly “seasonal” and you wish to have the PMs become “dormant” when out of season.

6.3 Sequencing the PM

The **Job Plan Sequence** tab is used to assign multiple job plans to a single PM record. With it, you can set up a standard sequence for maintenance procedures (e.g., monthly, quarterly, and annual job plans).

This allows a single PM record to generate the different PM work orders (monthly, quarterly, annual), and does not require three separate PMs for the same piece of equipment and each PM frequency.

By assigning a sequence number to each job plan (on the PM record), you specify which job plan is automatically selected when you generate a work order from the PM record (Maximo

keeps track of the PM work orders that are generated and calculates/schedules when to generate the appropriate PM work order (i.e. monthly vs. quarterly) – and will only generate a single PM work order.

Note: Always start with the most frequent job plan (the one identified on the **Time Base Frequency** tab); all others will occur in multiples of that original frequency.

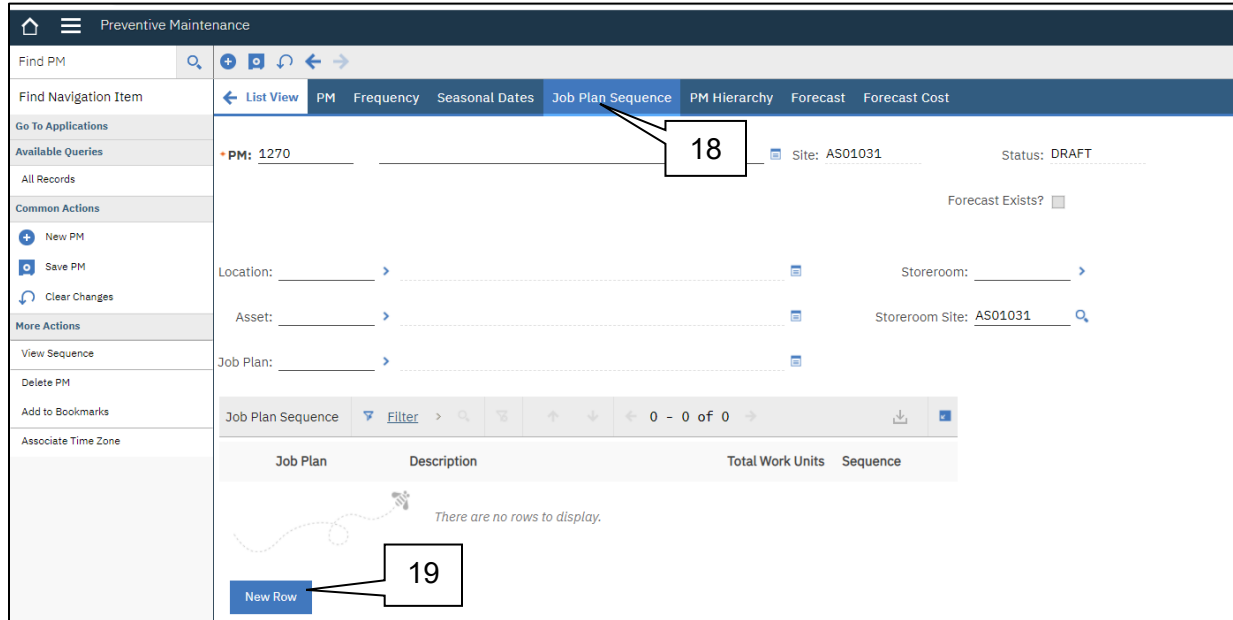


Figure 36: Job Plan Sequence Tab

Note: The job plan sequence is populated with the initial job plan you entered on the PM with a sequence value that reflects the most frequent occurrence entered in the Time Based Frequency tab.

18. Click on **Job Plan Sequence** tab.

19. Click **New Row** to add additional frequencies for the PM.

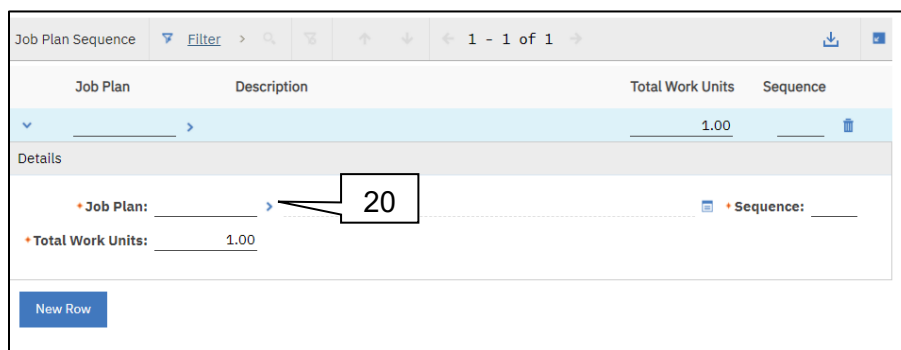


Figure 37: Job Plan Sequence Section

20. Click on the **blue arrow** next to the Job Plan field.

The **Select Value** window opens.

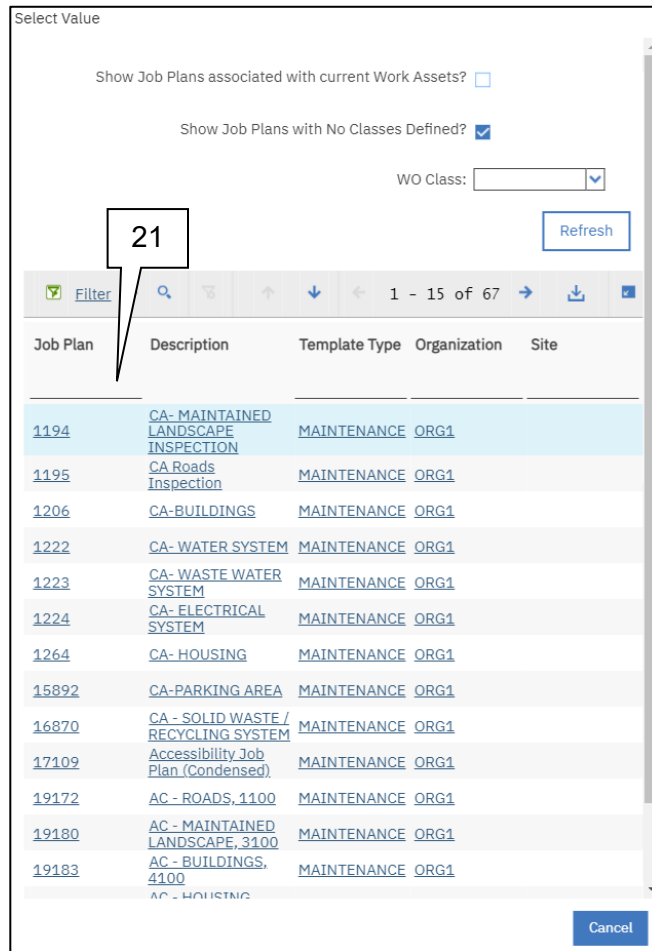


Figure 38: Select Value Window

21. Select the **Job Plan** that corresponds with the *next-most* frequent occurrence of the PM (in this example, Quarterly).

You will be taken back to the **new Preventive Maintenance form**.

The screenshot displays the 'Job Plan Sequence' form. At the top, the navigation bar includes 'List View', 'PM', 'Frequency', 'Seasonal Dates', 'Job Plan Sequence', 'PM Hierarchy', 'Forecast', and 'Forecast Cost'. The main form area shows 'PM: 1271' with a callout box '23' pointing to it. Other fields include 'Site: AS01001', 'Status: DRAFT', 'Forecast Exists?' (checkbox), 'Location', 'Storeroom', 'Asset', 'Storeroom Site: AS01001', and 'Job Plan'. Below these is a table with columns 'Job Plan', 'Description', 'Total Work Units', and 'Sequence'. The table contains one row with '1.00' in the 'Total Work Units' column. A 'Details' section below the table shows 'Job Plan', 'Sequence', and 'Total Work Units: 1.00'. A callout box '22' points to the 'Sequence' field in the details section. At the bottom left, there is a 'New Row' button.

Figure 39: Preventive Maintenance Form

22. Enter the Job Plan **Sequence** value that corresponds to the frequency (i.e., Quarterly = 3 “every three months”).
23. Click **Save**.

Note: Continue adding job plans using the **New Row** button until all frequencies for the PM have been added.

Note: Before PM work orders can be generated, the PM record must be set to **ACTIVE** status.

24. Click on **Change Status** located in the navigation bar on the left side of the screen.

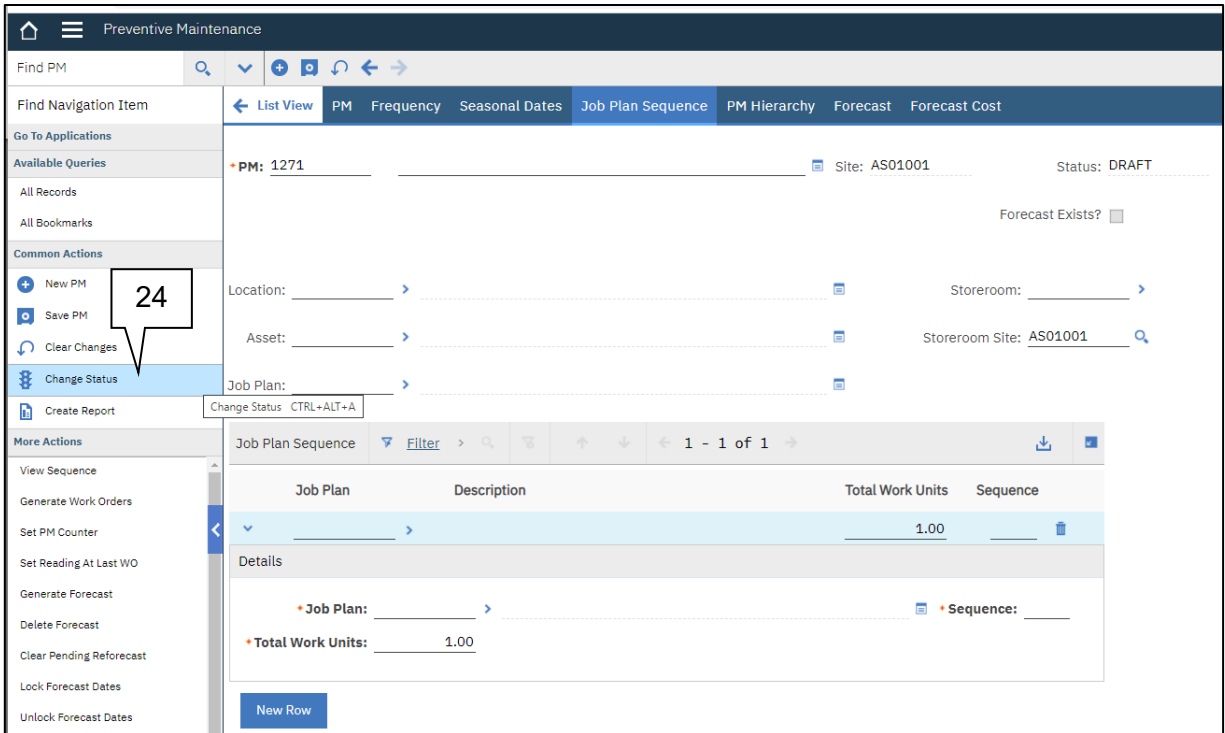


Figure 40: Change Status Location

25. Select **Active** as the **New Status**.

26. Click **OK**.

7. Credentials

If you forget your login information or cannot login, contact your EAMS administrator.