

## MMS-WQM-206

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Mireaux Management Solutions



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MMS-WQM-206 Revision: 06/01/2014

## **Table of Contents**

1.0	PUR	URPOSE AND SCOPE4						
2.0	TER	TERMS AND DEFINITIONS4						
3.0	SECU	URITY ROLES	4					
4.0	4.0 INSTRUCTIONS							
	4.1	ASSETS OR EQUIPMENT	6					
		4.1.1 Adding Asset Information	6					
		4.1.2 Locating Asset Information	9					
		4.1.3 Viewing Asset Information						
		4.1.4 Editing Asset Information	12					
		4.1.5 Deleting Asset Information	12					
	4.2	WORK ORDERS	13					
		4.2.1 Requesting A Work Order	13					
		4.2.2 Viewing A Work Order	15					
		4.2.3 Processing A Work Order	16					
		4.2.4 Processing A Work Order To Coordination Status	16					
		4.2.5 Processing A Work Order To Pending Status						
		4.2.6 Processing A Work Order To Repair Status						
		4.2.7 Processing A Work Order To Awaiting Verification	20					
		4.2.8 Verifying And Closing A Work Order	20					
		4.2.9 Editing A Work Order	21					
		4.2.10 Deleting A Work Order	21					
	4.3	PREVENTIVE MAINTENANCE	21					
		4.3.1 Scheduling Preventive Maintenance	22					
		4.3.2 Adding PM Activity	22					
		4.3.3 Viewing PM Information	24					
	4.4	REPAIR	25					
		4.4.1 Entering Repair Information	25					
		4.4.2 Viewing Repair Information	27					
	4.5	USAGE	27					
		4.5.1 Entering Usage Information	27					
		4.5.2 Export/Import Usage Information	29					
		4.5.3 Viewing Usage Information						
	4.6	ADVANCED SEARCH						
	4.7	MAINTENANCE KEY PERFORMANCE INDICATORS (KPIS)						
		4.7.1 Preventive Maintenance & Repair KPIs						
		4.7.2 Work Order KPIs						
	4.8	MAINTENANCE ADMINISTRATION	41					



5.0

MMS-WQM-206 Revision: 06/01/2014

	4.8.1 Adding/Editing/Deleting An Asset Status	-2
	4.8.2 Adding/Editing/Deleting An Asset Type	-3
	4.8.3 Adding/Editing/Deleting Assigned User Locations	
	4.8.4 Adding/Editing/Deleting Assigned User WO Locations	4
	4.8.5 Adding/Editing/Deleting Departments	-5
	4.8.6 Adding/Editing/Deleting Locations	-6
	4.8.7 Adding/Editing/Deleting PM Activity Tasks	-7
	4.8.8 Adding/Editing PM Types	-9
	4.8.9 Adding/Editing/Deleting PM Areas	50
	4.8.10 Setup PM E-Mail Reminder	51
	4.8.11 Setup WO E-Mail Reminder	52
	4.8.12 WO Priority	54
REV	ION LOG	54



## **1.0 PURPOSE AND SCOPE**

The Maintenance Application is designed to keep an inventory of usage, preventive maintenance, and repair of company assets or equipment and to serve as a place to issue Work Orders for maintenance repairs. It is highly flexible and customizable to suit your company's needs.

The Maintenance Application Manual instructs users in the use of the Maintenance Application of Web QMS. The purpose of this manual is to guide users through the following aspects of the Maintenance Application:

- Asset Information (adding Assets, searching for Assets)
- Maintenance of an Asset Status Log
- PM Status Log
- Repair Status Log
- Work Order Request
- View Work Orders
- Advanced Search
- KPIs
- **NOTE 1:** In order to perform the actions below you will need to be assigned the Maintenance Admin and/or Maintenance Tech security roles on Web QMS.
- **NOTE 2:** In order to perform the actions in section **4.8 Maintenance Administration** you will need to be assigned the Administrator role.
- **NOTE 3:** Depending on the customization of your Web QMS, the figures shown in this manual may not coincide perfectly with your Web QMS.

### 2.0 TERMS AND DEFINITIONS

- PM Preventive Maintenance
- WO Work Order
- KPI Key Performance Indicator

## **3.0 SECURITY ROLES**

Administrator

Full Web QMS Enterprise Administrator. This user can edit, create, or delete pages, as well as add, edit, or delete modules.Administrators can also authorize users, add roles, view File Manager, clear Logs, and view/clear the Recycle Bin.



MMS-WQM-206 Revision: 06/01/2014

Employee	This user has full access to view information on Web QMS, but limited ability to edit or create records. Employees may view the Asset Log, Asset Information, and Work Orders.
Maintenance Admin	This user has full Administrator permission within the Maintenance Application, including adding, editing, and removing assets from the system; issuing and processing the work orders through all of the stages; and setting up preventive maintenance.
Maintenance Supervisor	This user is able to view Asset Status, add PM Repair info, view Usage Info, and process Work Orders.
Maintenance Tech	This user can issue work orders, and process the work orders through pending and repair stage.

## 4.0 INSTRUCTIONS

The **Maintenance Application** can be located through the **Operations Tab** of the Top Menu or in the Left Menu of the Operations page.

	OPERATIONS HUMAN RE		dmin
Calibration	5 Calibration	NCR	Certification
	Basic Info		
	Calibration Status Report		
NCR	Calibration Advanced Search		Certification Advanced Search
	Calibration KPIs		Certification KP1s
			Maintenance & Repair
ertification			Asset Information
laintenance & Repair			
tabase Management	The second section of the sectio		Maintenance KPts
5	Database Management		
	Database Size Report		

When you CLICK the **Maintenance Tab** in the Left Menu of the Operations page or the Top Menu of the Operations Tab, you will be directed to the **Maintenance Application** page, which should look similar to this:



MMS-WQM-206 Revision: 06/01/2014

		K	MIREAU) Management Solution	Web QMS	ENTERPRISE MANAGEMENT SYSTEM	Tuesday, December 17, 2013 Mireaux Admin
QUALITY DOCI	JMENT CONTROL	OPERATIONS	IS HUMAN RESOURCES	SALES	6 Admin	Search
Asset Information Asset Status Log Work Order Request View Work Orders Advanced Search	WEL The Ma The sy well as	COME TO TH	andle pertinent information rega e maintenance required such as	rack of you rding the e	ur equipment assets, its us equipment, as well as ongo	sage, repair and preventive maintenance. ing usage, historical repair information as ik you for helping with the company 's
Vaintenance KPIs Find Asset			nain functions o cenance Applica lenu.			

#### 4.1 ASSETS OR EQUIPMENT

The Maintenance Application lets your company record, track, and edit detailed information about its assets and equipment.

#### 4.1.1 Adding Asset Information

You can record and describe company assets or equipment using the **Asset Information** page. To access the Asset Information page, CLICK **Asset Information** in the Left Menu of the **Maintenance Application** page or in the Top Menu of the Operations Tab.

Asset Information		OURCES HSE IS A	dmin
Asset Status Log	Calibration Basic Info Calibration Status Report Calibration Advanced Search	NCR Request	Certification Certification Types Certification History Certification Advanced Search
Work Order Request			Certification KPIs Certification KPIs Maintenance & Repair Asset Information
View Work Orders			Abservation Log PM Status Log Work Order Request
Advanced Search			View Work Orders Advanced Search Maintenance KPts
Maintenance KPIs	Database Management Database Size Report		

The screen that opens will show a form with different fields which will be used to define and describe the asset.



MMS-WQM-206 Revision: 06/01/2014

SSET INFO	RMATION		
AssetID:-	ID F5BAF64	Asset Type:•	Please Choose
Asset Description:•			
		0	
Location:	Please select location	Department or Area:•	Please select Department
Owner Asset D#:		Serial Number:	
Cycle Time(seconds):		🔟 Model:	
Product Line:		Product P/N:	
Comments:			
anufacturer	:	Manufacturer	
ame:•		Contact name:	
anufacturer hone:			
Date Built:		Date Acquired:	
Purchased rice (\$):			
wner/Assigned	Please Select		
Asset licture(s):	Examinar_ No se ha seleccionado ningún archivo.	Asset Certificate(s):	Examinar_ No se ha seleccionado ningún archiv
Asset laintenance hecklist(s):	Examinar. No se ha seleccionado ningún archivo.	Asset Maintenance Manual(s):	Examinar No se ha seleccionado ningún archiv
Asset	Please Choose		

**NOTE:** Fields marked with a red asterisk are required.

The **Asset Information** page contains the following fields:

- **Asset ID:** This is a system-generated number. However, you can override this number and ENTER your own **Asset ID**.
- **Asset Description:** DESCRIBE the **Asset**, including the physical appearance, capabilities, uses, etc., as appropriate.
- **Asset Type:** SELECT the **Type** of asset from a pre-specified drop down list. The choices on the list will vary according to the asset types your company has set in the Organization Variables area.
- **Location:** SELECT the **Facility** where the equipment is located. The Department or Area field will populate with options depending on this choice.
- **Department or Area:** SELECT the **Department** or area from the drop down menu. The **Department or Area's** drop down menu choices will vary based on the option you SELECT in the **Location** field.
- **Owners Asset ID#:** ENTER the **Owners Asset ID** if it is different from the Asset ID.
- Serial Number: ENTER the Serial Number of the asset.
- **Cycle Time (seconds):** ENTER the **Cycle Time** in seconds for the asset, if applicable.
- **Model:** ENTER the **Model Name** and/or number of the asset.
- **Product Line:** ENTER the **Product Line** that the asset belongs to or is used in.



- MMS-WQM-206 Revision: 06/01/2014
- **Products P/N:** If the asset is used to make specific products, ENTER the **P/N** associated with them.
- **Comments:** ENTER any relevant **Comments** about the asset.
- **Manufacturer Name:** ENTER the **Name** of the company that manufactured the asset, if available.
- Manufacturer Contact Name: ENTER the Manufacturer's contact person Name, if available.
- Manufacturer Phone: ENTER the asset Manufacturer's Phone Number, if available.
- **Date Built:** SPECIFY the **Date** the asset was built, if available.
- **Date Acquired:** SPECIFY the **Date** the asset was acquired, if available.
- **Purchased Price (\$):** ENTER the **Price** at which the asset was purchased, if available.
- **Owner/Assigned To:** SELECT the **Owner** or **Assignee** of the asset from the drop down menu:
  - **Company:** If the company owns the asset.
  - **Employee:** If the employee owns or has been assigned the asset.
  - **Customer:** If the customer owns or has been assigned the asset.
  - **Supplier:** If the supplier owns or has been assigned the asset.

Depending on selection of Employee, Customer, or Supplier, another field will appear with the appropriate secondary options to select which Employee, Customer, or Supplier owns the asset.

- **Asset Picture(s):** UPLOAD a **Picture** of the asset in a .jpeg or.gif file, if available.
- **Asset Certificate(s):** UPLOAD any **Certificates** associated with the asset in PDF, Word, or Excel formats, if available.
- **Asset Maintenance Checklist(s):** UPLOAD the asset's **Maintenance Checklist** in PDF, Word, or Excel format, if available.
- **Asset Maintenance Manual(s):** UPLOAD the asset's **Maintenance Manual** in PDF, Word, or Excel format, if available.
- **Asset Status:** SELECT from the drop down menu whether the asset is:
  - Active: Currently in use.
  - **Inactive:** Not currently in use.
  - **Retired:** No longer being used.

After you have entered all the necessary information for the asset, CLICK **Save**. The following message will appear on the screen:



You can CLICK **Continue** to return to the **Maintenance Application** page, or you can CLICK the **ID** # to view the **Asset View** page, like this:



MMS-WQM-206 Revision: 06/01/2014



Asset Asset Owne Serial Asset L Model Comn Asset Manu Manuf Manuf Owne Custo Asset Asset Manual

ou are here: OPERATION	IS > Maintenance & Repair > Asset View				
ASSET VIEW					
ASSET INFORMATION		USAGE INFORM	ATION	REPAIR INFO	RMATION
	🖨 ASSET # ID F680278				
Asset Type	Air Hoist				
Asset Description	Ingersoll-Rand Air Hoist. The HLK Series incorporates a larg chain and a lower gear ratio to handle increased load capa 6 metric tons and are severe-duty rated.				
Owner Asset ID	1330	Cycle Time			
Serial Number	A03360A36158B	Product Line	HLK250	KR-2C10-C6	
Asset Location	Best1 Derrick Barge	Product P/N	Drill 1		
Model	HLK250KR-2C10-C6				
Comments					
Asset Pic		Asset Cert			
Manufacturer Name	Ingersoll-Rand	Date Built	02/01/2	012	
Manufacturer Contact	Mary Smith	Date Acquired	03/01/2	012	
Manufacturer Phone		Purchased Price	\$4902		
Owner/Assigned To	Company	Employee			
Customer		Supplier			
Asset Checklist	,				

#### 4.1.2 Locating Asset Information

Once you have created an asset, it is easy to locate it within the Maintenance Application, whether you wish to review the information, delete the asset, or otherwise make modifications. There are three main ways to locate assets: the Asset Status Log page, the Find Asset/Go button, and the Advanced Search. Step-by-step guidelines on the first two methods are included below. For more information on the Advanced Search, refer to section 4.6 Advanced Search.

#### ASSET STATUS LOG a.

To access the Asset Status Log page, CLICK Asset Status Log in the Left Menu of the Maintenance Application page or in the Top Menu of the Operations Tab.



The screen that will open has two search fields to narrow down the assets displayed by status or location. The fields' default value is to display all assets.



MMS-WQM-206 Revision: 06/01/2014

, v	SE Asse Subi	T IN t Sta mit fo	IVENTOR	laintenance & Repair > A Y STATUS LOG Status>		Cocation	<all locations=""></all>							
			Asset ID	Asset Type	Asset Description	Serial No		Asset	Asset	PM	Usa	ge	Rep Info	air
								Location	Status	Info	Info		iiiio	
•	2	×	ID 1F0CD2F	Building	VOID			Houston	Active	into •		0	<ul><li>Into</li></ul>	•
e e	2		ID 1F0CD2F MX607-0166	-	VOID							0 0	0	e e
		×		Building				Houston	Active	۹	0	e e	0	
0	2	× ×	MX607-0166	Building Furniture	VOID	AK080312211A0		Houston Houston	Active Active	e e	0 0 0		0 0 0	0
0	2	× × ×	MX607-0166 MX697-0002	Building Furniture Printer	VOID Desk - wood veneer, P-top	AK080312211A0 CNN113AM1K9		Houston Houston Houston	Active Active Active	¢, ¢,	0 0 0	0	0 0 0	8 9

- Asset Status: SELECT Active to view a list of all assets currently in use. SELECT Inactive to view all assets not currently in use. SELECT Retired to view all assets which are no longer used.
- **Location:** SELECT from the drop down menu to display assets which are at a particular location.
- b. FIND ASSET/GO BUTTON

The Maintenance Left Menu has a **Go** button at the bottom of the menu:

Asset Information
Asset Status Log
Work Order Request
View Work Orders
Advanced Search
Maintenance KPIs
Find Asset
GO

When you CLICK **Go**, the Maintenance Application displays all assets currently in the system. Depending on your organization and your list of assets, this list may vary in length:

				Iaintenance & Repair > /									
			Asset ID	Asset Type	Asset Description	Serial No	Asset Location	Asset Status	PM Info	Usag Info	ge	Repa Info	air
0	2	×	ID 1F0CD2F	Building	VOID		Houston	Active	Θ	0	0	0	0
0	2	×	MX607-0166	Building	VOID		Houston	Active	0	Q	0	0	0
Θ	2	×	MX697-0002	Furniture	Desk - wood veneer, P-top		Houston	Active	Θ	0	0	0	0
0	2	×	MX697-0003	Printer	Printer - black and white, double-sided	AK080312211A0	Houston	Active	0	0	Θ,	0	0

This is by far the easiest way to bring up all assets currently in the system. You can SCROLL down until you find the asset you need.

The Maintenance Left Menu has a **Find Asset** area at the bottom of the menu:



Asset Information
Asset Status Log
Work Order Request
View Work Orders
Advanced Search
Maintenance KPIs
Find Asset
GO

If you know a few characters of the Asset ID, you can TYPE them in here, CLICK **Go**, and all assets whose Asset IDs contain those characters will be displayed.

For example, let us look for Asset ID MX697-0054. First, we can TYPE **"54"** in the Find Asset box:

Find Asset	54
GO	

CLICK **Go**. You will see that the results include only the assets whose IDs contain those characters, including our original target, Asset ID MX697-0054:

You a	You are here: OPERATIONS > Maintenance & Repair > Asset Number Search												
AS	SET	r NU	MBER SEAF		NG								
			Asset ID	Asset Type	Asset Description	Serial No	Asset Location	Asset Status	PM Info	Usage	Info	Repai	r Info
۲	Ø	×	MX697-0054	Television	Television - black, 42" HDTV	MF03300095	Houston	Active	0	0	0	0	•
0	2	×	MX697-0154	Computer	Desktop computer, black with silver accents	2MD313076PG	Houston	Active	θ.	0	9	0	0

#### 4.1.3 Viewing Asset Information

After you've located an asset within the system, you can view its information using the **Asset View** page. To access the full asset or equipment information, CLICK the **Magnifying Glass icon** in the first column of the **Asset Status Log** page, **Asset Number Search Listing** page, or **Advanced Search Results** page.

			Asset ID	Asset Type	Asset Description	Serial No	Asset Location	Asset Status	PM Info	Usage	Info	Repair	r Info
0	2	×	MX697-0054	Television	Television - black, 42" HDTV	MF03300095	Houston	Active	•	0	0	Ũ	0

The **Asset View** page has four tabs:

- Asset Information
- Preventive Maintenance Information
- Usage Information
- Repair Information

```
You are here: OPERATIONS > Maintenance & Repair > Asset View
ASSET VIEW
ASSET INFORMATION PREVENTIVE MAINTENANCE INFORMATION USAGE INFORMATION REPAIR INFORMATION
```



The **Asset Information Tab** contains the information that was entered when the asset was created in the **Asset Information** page.

ASSET INFORMATION	PREVENTIVE MAINTENANCE INFORMATION	USAGE INFORM	ATION REPAIR INFO	RMATION
	🖨 ASSET # MX697-0054			
Asset Type	Television			
Asset Description	Television - black, 42" HDTV			
Owner Asset ID		Cycle Time		
Serial Number	MF03300095	Product Line		
Asset Location	Houston	Product P/N		
Model	Viera TC-P42C2			
Comments				
Asset Pic		Asset Cert		
Manufacturer Name	Panasonic	Date Built		
Manufacturer Contact		Date Acquired		
Manufacturer Phone		Purchased Price	s	
Owner/Assigned To	Employee	Employee	Boudreaux, Miriam	
Customer		Supplier		
Asset Checklist				
Asset Manual				

#### 4.1.4 Editing Asset Information

To edit information about an asset or equipment in the **Asset Status Log** page, **Asset Number Search Listing** page, or **Advanced Search Results** page, CLICK the **Manage Yellow Pencil icon**.

		Asset ID	Asset Type	Asset Description	Serial No	Asset Location	Asset Status	PM Info	Usage	Info	Repair	Info
۹,	X	MX697-0054	Television	Television - black, 42" HDTV	MF03300095	Houston	Active	0	Q	0	0	θ.

The Manage Yellow Pencil icon will direct you to the Asset Information page.

#### 4.1.5 Deleting Asset Information

To delete an asset in the **Asset Status Log** page, **Asset Number Search Listing** page, or **Advanced Search Results** page, CLICK the **Red X Delete icon**.

Ass	set ID Asset Type	Asset Description	Serial No	Asset Location	Asset Status	PM Info	Usage	Info	Repair	Info
🥄 🗷 🗶 MX6	697-0054 Television	Television - black, 42" HDTV	MF03300095	Houston	Active	0	0	0	Q	Θ,

The following message will appear. If you are sure you wish to delete the asset, CLICK **OK**.

You are about to permanently delete this record. Do you wish to continue?
OK Cancel



MAINTENANCE APPLICATION MANUAL MMS-WQM-206

#### 4.2 WORK ORDERS

#### 4.2.1 Requesting A Work Order

The **Work Order Request** page is used for creating a work order request. To access the **Work Order Request** page, CLICK **Work Order Requests** in the Left Menu of the **Maintenance Application** page or in the Top Menu of the Operations Tab.

Asset Information	OP	erations	15 HUMA	N RESOURCES SALES	Admin
Asset mormation	8	Calibration		B NCR	Certification
Asset Status Log		Basic Info Calibration Status Calibration Advar Calibration KPts		NCR Request NCR Status Reports NCR Advanced Search NCR KPhs	Certification Type Certification History Certification Advanced Sean Certification KPa
Work Order Request		Auditing Ser		Web QMS Software Web QMS Calendar Technical Support	Asset Status Loo
View Work Orders		Audit Colendar		Time Sheet Web QMS Change Log Web QMS Downtime Log	Work Order Request View work Orders Advanced Search
Advanced Search		Consulting		Web GMS Manuala	Maintenance KPIa
Maintenance KPIs		Completed Act All Action from			,

The screen that opens will show a form in which different fields will be used to define the work order request.

You are here: OPERATIONS	> Maintenance & Repai	r > Work Order	Requests
WORK ORDER RI	EQUEST		
Work Order Number:	WODE40168		]
Date:	06/19/2012	Select Date	
Equipment Id or Individual Item:*	● Enter Asset ID ◎ Search For Asse ◎ Individual Item	et	
Asset ID:*			]
Problem Summary:*			4
Description of Problem:*			
<ul> <li>Have you provided all of the Work Order information for this request?:•</li> <li>Submit</li> </ul>			

**NOTE:** Fields marked with a red asterisk are required.

The **Work Order Request** form contains the following fields:

- Work Order Number: This number is generated by the system, or you can ENTER your own Work Order Number if you choose.
- **Date:** ENTER the **Date** you are requesting the work order.



• **Equipment ID or Individual Item:** SELECT from three options:

Equipment ld or Individual Item:*	● Enter Asset ID ○ Search For Asset ○ Individual Item
Asset ID:*	

- **Enter Asset ID**: SELECT this option if you know all or part of the Asset ID for the equipment in question. The information you ENTER will be matched against the entire Asset Inventory. Once the match has been made, all possible equipment that matches your criteria will be shown for your selection.
- **Search For Asset:** If you are not sure about the Asset ID, this option will help you locate an asset. SELECT **Location** and **Equipment Type** and the possible asset will be shown in the drop down menu of the Asset ID field.

Equipment Id or Individual Item:*	<ul> <li>Enter Asset ID</li> <li>Search For Asset</li> <li>Individual Item</li> </ul>	
Location:	Please select location	•
Equipment Type:	First Select a Location	•
Asset ID:	First Select a Type	-

- **Individual Item:** SELECT this option if the work order is for an item that is not part of the Asset Inventory. If you select Individual Item, you will need to FILL OUT two extra fields: **Equipment** and **Equipment Description**.

Equipment Id or Individual Item:*	© Enter Asset ID © Search For Asset ◉ Individual Item
<ul> <li>Equipment:</li> <li>Equipment</li> <li>Description:*</li> </ul>	

- **Equipment:** ENTER the item that needs repair. This could be a wall, driveway, etc.
- Equipment Description: ENTER the long description for the above item.
- **Problem Summary:** ENTER a **Summary** of the problem in this field.
- **Description of Problem:** ENTER a **Detailed Description** of the problem so that the person to whom the work order is assigned will understand the problem well.
- Have you provided all of the Work Order information for this request?: CHECK this box if you have completed the Work Order Request form to your satisfaction, then CLICK **Submit** to ENTER the Work Order Request into the system.



#### 4.2.2 Viewing A Work Order

The **View Work Orders** page is used to search and view work orders. To access the **View Work Orders** page, CLICK **View Work Orders** in the Left Menu of the **Maintenance Application** page or in the Top Menu of the Operations Tab.

Asset Information	OPERATIONS IS HUM	AN RESOURCES SALES	Admin
Asset Status Log	Calibration Basic Info Calibration Status Report Calibration Advance Search Calibration Advance Search	NCR Request NCR Status Reports NCR Advanced Search NCR Advanced Search	Certification Certification Type Certification History Certification Advanced Search Certification Kthe
Work Order Request	Auditing Services	Web QMS Software Web QMS Calendar Technical Support	Asset Status Log
View Work Orders	Audit Colendar	Time Sheet Web QMS Change Log Web QMS Downtime Log Web QMS Manuala	Work Orders View Work Orders Advanced Search Mainlenance KPha
Advanced Search	Consulting Project Action Items Completed Action Items		addition of NPA
Maintenance KPIs	Al Action tems		b,

The screen that opens will show search fields used to look for work order requests.

VIEW WORK ORDERS		
Location:Select all Locations	▼ WO Status: All Statuses	▼ Date Range: Select All ▼
Submit for Search		

The top area of the page contains fields to perform a search for assets:

- **Location:** SELECT the **Location** of the work order from the drop down menu, which should consist or your Locations.
- **WO Status:** SELECT the **Status** of the work order from the drop down menu.
  - **Open:** The work order request has just been made and has not been worked on.
  - **Pending:** The work order is unable to proceed due to a lack of information, parts, or other resources.
  - **Repair:** The asset is being repaired.
  - **Awaiting Verification:** The asset has been repaired, but no one has confirmed that the repairs addressed the initial issue.
  - **Closed:** The Work Order Request is completed.
- **Date Range:** SELECT a range of dates from the drop down menu. Work orders created during that time frame will appear in the search.
  - Last 7 Days: Will show the work orders that have been created in the last 7 days.
  - Last 14 Days: Will show the work orders that have been created in the last 14 days.
  - Last 30 Days: Will show the work orders that have been created in the last 30 days.
  - Last 60 Days: will show the work orders that have been created in the last 60 days.

CLICK **Submit for Search** to continue. The search results will be shown on the bottom part of the page.



View Work Order Results											
											Records Per Page 25 •
				Entered	WorkOrder	Asset or Equipment	Description	Summary	Priority	Status	DateClosed
٩.,	1	0	×	07/29/2013	W03E34FEE	URTB 131(Toolbox)	Upright Toolbox	Tool box won't close	Critical	Repair	

You can also locate work orders using Advanced Search. For more information about Advanced Search, refer to section **4.6 Advanced Search**.

If you wish to view detailed information about a certain work order, CLICK the **Magnifying Glass icon** in the first column to view the report.

	EAUX ment Solutions	S WHI Ga M	MAII	NTENANCE PF WORK	C ROGRAM C ORDER	
	We	ork Order #W	O3E34FEE - Re	pair	2	
Vork Order Date:	7/29/2013	Location:	Houma	Department:	OP&A	
set ID or uipment:	URTB 131	Equipment Type:	ToolboxUpright Toolbox	Requested By:	Mireaux Admin	
roblem ummary:	Tool box wor	i't close	-			
escription of roblem:	The hinges o	on the toolbox hav	e broke and you can no	o longer lock the box c	orrectly.	
Coordination Information						
Date:	07/29/2013	Coordinated By:	Admin, Mireaux			
Approve:	Approved	Priority:	Critical			

#### 4.2.3 Processing A Work Order

Once a work order has been requested, it must be processed and acted upon, passing through a series of stages. These stages are **Open, Coordination, Pending, Repair, Awaiting Verification,** and **Closed.** 

You can process a work order from the **View Work Orders** page by CLICKING the **Green Arrow icon** in the left column.

Date (asc)	WorkOrder	Asset or Equipment (asc)	Description	Summary	Priority	Status	DateClosed (asc)
🔍 🖻 🧿 🗙 03/15/2013	WO5A77387	ID A7443BC(Dive Compressor)	Drilling bit	Torn plates	Critical	Open	

This link will lead to different screens depending on the status of the work order.

#### 4.2.4 Processing A Work Order To Coordination Status

If your work order is open when you CLICK the **Green Arrow icon**, you will enter the **Work Order -Coordination Status** page.



MMS-WQM-206 Revision: 06/01/2014

WO INFORMATION			
Work Order Number:	W05A77387	Date:	3/15/2013
Asset ID:	ID A7443BC	Location:	Best1 Demick Barge
Equipment Type:	Dive Compressor	Equipment	
Equipment Description:		Entered By:	Soehal M
COORDINATION Approve:-	- Please Select -	Date:	12/17/2013
Approve.	Please Select 💌	- Date.	12/17/2013
JPDATE (If necessary)			
Problem Summary:	Tom plates	Description of Probl Torn plates	em: 
ASSIGNMENT			
Coordinated By:•	Please Select	Coordination Info ent	tered By : Mireaux Admin
WO Priority:•	Critical		
Assign to:+	O All Maintenance Techs		
	Select Maintenance Tech		
	No Maintenance Tech Assignment		
Comments or Instructions:			

**NOTE:** Fields marked with a red asterisk are required.

The upper section of the work order is pre-populated; the **Coordination** section of the work order contains the following fields:

- **Approve:** INDICATE whether you would or would not like to **Approve** the work order, **Reject and Close the WO** or **Reject and Back to previous page**.
- **Date:** ENTER the **Date** that this work order is being set to Pending status.

In the **Update (if necessary)** section you need to verify if the information introduced in **Problem Summary** and **Description of Problem** is correct. Update this section only if necessary.

The last section **Assignment** contains the following fields:

- **Coordinated by:** ENTER the **Name** of the person setting the work order to Coordinated status.
- **Coordination Info entered by:** This field is pre-populated.
- WO Priority: SELECT WO Priority.
- Assign to:
- Comments or Instructions

When the Work Order-Coordination Status is complete, CLICK **Submit** to proceed. The following confirmation page will appear:



				You are here: OPERATIONS > Maintenance & WORK ORDER - COORDIN		orkOrder-Coordination			
				Thank you. The status of Work Order # 1 Enter another Work Order	NO5A77387 has been modified View Work Orders	to Coordination.			
		Entered	WorkOrder	Asset or Equipment	Description	Summary	Priority		DateClosed
•	2 🕑 X	03/15/2013	WO5A77387	ID A7443BC(Dive Compressor)	Drilling bit	Torn plates	Critical	Coordination	

#### 4.2.5 Processing A Work Order To Pending Status

A Pending work order is not yet ready for repair and is pending information, parts, or other resources. If your work order is in Coordination stage when you CLICK the **Green Arrow icon**, you will enter the **Work Order - Pending Status** page. The upper section of the work order is pre-populated; the **Pending Information** section of the work order needs to be entered. You need to complete the following fields:

					Pending Information			
					WO Status> © Keep Pending (add more © Enter Pending Information © Skip Pending go to Repair	0	Pending Info Entered Dy:	Manual Almon
WORK ORDER - PEN					Cate:-	12/18/2013 Admin, Mireaux	1	
Work Order Namber:	805477187				Pending Description>			
Date:	Difference.							
Asset ID:	IO ADVICINE:	Location:	Beell Corros Rappo					
Equipment Type:	Dis Completion C							
Equipment:		Problem Summary:	Carry promise -					
Coupment Description:		Description of Problem:	2000 allene	;at	Rejection Comments:			
Entered by:	Carlos M.				Update Work Order			

**NOTE:** Fields marked with a red asterisk are required.

The Work Order - Pending Status page contains the following fields:

- WO status: SELECT the Status for this work order:
  - **Keep Pending (add more to pending summary later):** If you wish to SAVE some information, but not advance the work order, SELECT this option to keep the WO Status **Pending**.
  - **Enter Pending Information:** If the work order cannot currently proceed due to a lack of information, parts, or other resources, SELECT this option to change the WO Status to **Pending**.
  - **Skip Pending:** If the work order is ready to proceed, SELECT this option to change the WO Status to **Repair**.
- **Date:** ENTER the **Date** when the decision to place the work order on hold was made.
- **Pending By:** SELECT the **Person** who made the decision.
- **Pending Description**: DESCRIBE the **reason(s)** why the work order cannot currently proceed: lack of parts, lack of information, etc.

When the Work Order-Pending Status is complete, CLICK **Update Work Order** to proceed. The following confirmation page will appear:



	You are here: OPERATIONS > Maintenance & Repar > V WORK ORDER - PENDING STATU Thank you. The status of Work Order # W05A773	JS		
L		View Work Orders	Diatiby Status	DateClassed
Entered WorkOrder Asset	or Equipment         Description           43BC(Dive Compressor)         Drilling bit	Summary Torn plates	Priority Status Critica Pending	DateClosed

#### 4.2.6 Processing A Work Order To Repair Status

If your work order is Pending when you CLICK the **Green Arrow icon**, you will enter the **Work Order** -Pending Status page. The Work Order upper section is pre-populated; in the Pending Information section, Skip Pending go to Repair Information has to be marked if the work order is ready to proceed and the following section, Repair Information will open. In the Repair stage, you need to complete the following fields:

Repair Information				
WO Status:			Repair Info Entered By:	Mireaux Admin
Keep Open (add more to rep	air summary later)			
Submit Repair Information				
Date:		Select Date		
Repaired By:	Admin, Mireaux	-		
Repair Action Taken:				
Update Work Order				

**NOTE:** Fields marked with a red asterisk are required.

The **Repair Information** page contains the following fields:

- **WO status:** SELECT the **Status** for this work order:
  - **Keep Open**: If you wish to SAVE some information, but not advance the work order, SELECT this option to set the WO Status to **Repair**.
  - **Submit Repair Information:** If the repairs have been completed and all necessary information is available, SELECT this option to change the WO Status to **Awaiting Verification**.
- **Date:** ENTER the **Date** when the repairs were made.
- **Repaired By:** SELECT the **Person** who made the repairs.
- **Repair Action Taken**: DESCRIBE the **Repairs** which were made.

When the Work Order-Pending Status is complete, CLICK **Update Work Order** to proceed. The following confirmation page will appear:

You are here: OPERATIONS > Maintenance & WORK ORDER - REPAIR S	Repair > Work Order Request > WorkOrder-Repair TATUS					
Thank you. The status of Work Order # W	Thank you. The status of Work Order # WO9A64262 has been modified to Repaired.					
Enter A New Work Order	View Work Orders					



MMS-WQM-206 Revision: 06/01/2014

			Date (desd	WorkOrder	Asset or Equipment	Description	Summary	Priority	Status DateClosed	
0	Ø 🗿	×	03/15/2013	WO5A77387	ID A7443BC(Dive Compressor)	Drilling bit	Torn plates	Critical	Repair	

#### 4.2.7 Processing A Work Order To Awaiting Verification

A work order is **Awaiting Verification** when the asset has been repaired, but no one has confirmed that the repairs were done. Once you are ready to confirm or verify the repair, CLICK on **Submit Repair Information** to verify the repairs have been completed and all necessary information is available. The WO Status will change to **Awaiting Verification**.

Da	ate (desc) WorkOrder	Asset or Equipment	Description	Summary	Priority Status	DateClosed
् 🖉 🥥 🗙 06	0/18/2013 WO40651C1	ID A7443BC(Dive Compressor)	Drilling bit	broke	Critical Awaiting Verification	

#### 4.2.8 Verifying And Closing A Work Order

If your work order is Awaiting Verification, when you CLICK the **Green Arrow icon** you will enter the **Work Order –Verify & Close Status** page. The Work Order, Pending Information and Repair Information sections are pre-populated; the **Verify & Close Information** section needs to be entered. You need to complete the following fields:

		WORK ORDER - VERIF	Y & CLOSE STATUS				
		Vioris Order Number:	Torda Triet	Cate:	Evenent		
		Asset ID:	in a state of the	Location:	Band Davies Barge 1		
		Equipment Type:	The December 2				
		Equipment		Problem Summary:	lan paint		
		Equipment Description:	Transmission way	Description of Problem:			
		Entered By:	- 22 Promo 47				
		Pending Information					
		Date:	(2)(2)(2)	Peoding Info Entered By:	Anna Anna		
		<ul> <li>Pending By:</li> <li>Pending Description:</li> </ul>	Filman Schem				
		Pending Description:	Ang Language a				
		Repair Information					
		Dete:	12 vig 20 A	Repair Info Entered By:	Richard Admin		
		Repair Action Taker:	Distance Autom				
		- repair record anere.					
		E.				•	
Verify & Close Information							
Verify & Close Information							
						Verification late Federal	
Verify & Close Information	Approva and Close					Verification Info Entered	Mireaux Admin
	O Approve and Close					Verification Info Entered By:	Mireaux Admin
						Verification Info Entered By:	Mireaux Admin
	<ul> <li>Approve and Close</li> <li>Reject Repair</li> </ul>					Verification Info Entered By:	Mireaux Admin
						Verification Info Entered By:	Mireaux Admin
🛙 WO Status:						Verification Info Entered By:	Mireaux Admin
WO Status:						Verification Info Entered By:	Mireaux Admin
WO Status:	C Reject Repair					Verification Info Entered By:	Mireaux Admin
🛙 WO Status:						Verification Info Entered By:	Mireaux Admin
<ul> <li>WO Status:</li> <li>Date:-</li> <li>Verify By:</li> </ul>	C Reject Repair					Verification Info Entered By:	Mireaux Admin
WO Status:	C Reject Repair					Verification Info Entered By:	Mireaux Admin
<ul> <li>WO Status:</li> <li>Date:-</li> <li>Verify By:</li> </ul>	C Reject Repair					Verification Info Entered By:	Mireaux Admin
<ul> <li>WO Status:</li> <li>Date:-</li> <li>Verify By:</li> </ul>	C Reject Repair					Verification Info Entered By:	Mireaux Admin
<ul> <li>WO Status:</li> <li>Date:-</li> <li>Verify By:</li> </ul>	C Reject Repair					Verification Info Entered By:	Mireaux Admin
<ul> <li>WO Status:</li> <li>Date:-</li> <li>Verify By:</li> </ul>	C Reject Repair					Verification Info Entered By:	Mireaux Admin
<ul> <li>WO Status:</li> <li>Date:-</li> <li>Verify By:</li> </ul>	C Reject Repair					Verification Info Entered By:	Mireaux Admin
<ul> <li>WO Status:</li> <li>Date:-</li> <li>Verify By:</li> </ul>	C Reject Repair					Verification Info Entered By:	Mireaux Admin
<ul> <li>WO Status:</li> <li>Date:-</li> <li>Verify By:</li> </ul>	C Reject Repair		**			Verification Info Entered By:	Mireaux Admin

**NOTE:** Fields marked with a red asterisk are required.

The Verify & Close Information page contains the following fields:

• **WO status:** SELECT the **status** for this work order:



- MMS-WQM-206 Revision: 06/01/2014
- **Approve and Close**: If the repairs made address the initial issue adequately, SELECT this option to set the WO Status to **Closed**.
- **Reject Repair:** If the repairs did not resolve the initial issue, SELECT this option to return the WO Status to **Pending**. An additional field called **Rejection Comments** will open at the bottom of the screen.
- **Date:** ENTER the **Date** when the verification took place.
- Verify By: SELECT the Person who made the verification.
- **Review Action Taken**: DESCRIBE the **Actions** taken to confirm that the repairs made addressed the initial issue.
- **Rejection Comments**: This field appears only if the verifier chooses to reject the repair. Explain why the repair was rejected, in detail, so that the repairs can be improved upon.

#### 4.2.9 Editing A Work Order

If you wish to EDIT a work order for a certain asset, first LOCATE the work order, as explained in section **4.2.2 Viewing a Work Order**. Once you have located the desired work order, CLICK the **Manage Yellow Pencil icon** next to the work order in the left column of the page. A pop-up window will open, with all the fields described in section **4.2.3 Processing a Work Order** available to be edited. When you are finished, CLICK **Save** to proceed.

	Date (desc)	WorkOrder	Asset or Equipment		Description	Summary	Priority	Status	DateClosed
🥄 🖻 😜 🗙	06/18/2013	WO40651C1	ID A7443BC(Dive Comp	ressor)	Drilling bit	broke	Critical	Awaiting Verification	
WOnumber				WO56EB	638				
AssetID				CR 22					
EquipmentNo									
EquipmentDesc				5000 lbs					
EnteredDate				6/4/2013					
EnteredBy				Mireaux	Admin				
ProblemSum									
ProblemDesc				rely berin	ngs				
WOstatus				Pending	•				

#### 4.2.10 Deleting A Work Order

If you wish to DELETE a work order, first LOCATE the work order, as explained in section **4.2.2 Viewing a Work Order**. Once you have located the desired work order, CLICK the **Red X Delete icon** next to the work order in the left column of the page to delete the work order.

Γ		Date (desc)	WorkOrder	Asset or Equipment	Description	Summary	Priority Status	DateClosed
6	l 🖻 🔍 🛛	06/18/2013	WO40651C1	ID A7443BC(Dive Compressor)	Drilling bit	broke	Critical Awaiting Verification	

#### 4.3 PREVENTIVE MAINTENANCE

In addition to tracking company assets and equipment, you can also use the Maintenance Application to schedule preventive maintenance for assets and equipment.



#### 4.3.1 Scheduling Preventive Maintenance

You can schedule preventive maintenance for assets using the **PM Information Tab** of the **Asset View** page, accessible through the **Asset Status Log** page. CLICK the **Magnifying Glass icon** next to the asset in the PM Info column on the **Asset Status Log** page. This will take you directly to the Preventive Maintenance Information Tab of the **Asset View** page.

Γ				Asset ID	Asset Type	Asset Description (asc)	Serial No	Asset Location	Asset Department	Asset Status	PM	Info	Usage	e Info	Repai	r Info
1	0		×	ID 164F2A4	Vehicle	2011 BMW 328i Sedan	WBAPH7G	Houston	Finance	Active	۹,		0	0	0	0
1	θ,	2	×	ID E3E14CD	Control Valve	Basic control valve.		Houston	Facilities	Active	0		0	9	0	0

Then, from the Preventive Maintenance Information Tab of the **Asset View** page, CLICK **Add Asset PMI**.

You are here: OPERATIONS > ASSET VIEW	Maintenance & Repair > Asset View				
ASSET INFORMATION	PREVENTIVE MAINTENANCE INFORMATION	USAGE INFORMATION	REPAIR INFORMATION		
				CAdd Asset PMI	Current View : List of New PM's
-	ASSET #: ID E3E14CD	TYPE:		DESCRIPTION:	LOCATION:
		There are currently n	o details for this record.		

Once you CLICK **Add Asset PMI**, you will be asked to CHOOSE **PM Type** and **PM Area** from the drop down menu. These options are set using the Maintenance Administration drop down menu of the **Organization Variables** page. If you cannot find the PM type or PM area you need, you will have to add a new option. For more information about using the **Organization Variables** page, refer to section **4.9 Maintenance Administration**. CLICK **Save** to schedule the preventive maintenance for this asset.

	NTIVE MAINTENANCE INFORI		REPAIR INFORMATION
ASSET #: ID F394012	TYPE: Vehicle	DESCRIPTION: MINI Cooper	LOCATION: Lima
PM Type: Please choose PM Area: Please choose Start Date: 02/10/2014			
Save Cancel			

#### 4.3.2 Adding PM Activity

Once you have scheduled preventive maintenance, you can record its completion within the Preventive Maintenance Information Tab of the **Asset View** page. When you return to the **Asset View** page, you will see a **Green Plus Sign icon** next to the various scheduled PMs, like this:



MMS-WQM-206 Revision: 06/01/2014

						🕄 Add A	sset PMI Current V	iew : List All PM	l's
۵		ASSET #: ID F	394012	TYP	E: Vehicle	DESCRIPTIO	N: MINI Cooper	LOCATIO	ON: Lima
		PMID	РМ Туре	PM Area	Set Start Date	Date Started	Date Completed	Next PM Due	Remaining
9	×	PM 67BD6A0	Weekly	Tyres	02/10/2014			02/17/2014	1
0	×	PM 6E3A165	Daily	Interior	02/10/2014			02/11/2014	1
	×	PM 6B0D392	Yearly	Engine	02/10/2014			02/10/2015	1

When you CLICK the **Green Plus Sign icon**, you will see a new screen with a list of activities pertaining to that PM type.

ASSET #: ID	F394012	TYPE: Vehicle	DESCRIPTION	k MINI Cooper	LOCA	TION:	Lima
PM ID: PM 6E	3A165	PM TYPE: Daily	REMAINING ACTIVITI	ES: 1	NEXT PM DUE: In	ncom	plete
MActivity	Date	Tech	Comments	TotalHrs	DateCompleted		Instruction
Check the car is clean and smells nice on the inside	02/10/2014	•		0	02/10/2014	13	
Ensure the gas tank is filled	02/10/2014	•	1	0	02/10/2014	8	
Check oil	02/10/2014			0	02/10/2014	2	

FILL OUT each field with the appropriate information as each activity is closed out.

- **PM Activity:** The PM activity is pre-populated with instructions according to the type of the asset and the type of PM.
- **Date:** ENTER the **Date** when the PM was started. The default value **Date** is today.
- **Tech:** SELECT from the drop down menu the **Tech** who performed this maintenance. The default value is the user logged in, if he/she has Maintenance Tech role.
- **Comments**: ENTER relevant comments in this field such as whether the task was completed successfully, or the parts were broken, etc.
- **Total Hours:** ENTER the **Number** of hours that were spent on this PM Activity.
- **Date Completed:** ENTER the **Date** the PM Activity was completed.
- **Is Completed:** CHECK the box if the PM Activity was completed; otherwise leave it unchecked.
- **Instructions:** If specific work instructions were uploaded for this PM Activity, then they will appear here.



If there is any document that needs to be attached to this PM, CLICK **Browse** to locate the document from your local computer and then CLICK **Upload Attachment** to save it to Web QMS.

ASSET INFORMATION PREVENTIVE MAINTENANCE INFO	RMATION US/	AGE INFORMATION	REPAIR INFORMATION			
		🖨 Print ALL				
ASSET #: ID F394012 TYP	E: Vehicle	DE	SCRIPTION: MINI Cooper		LOCATION:	Lima
PM ID: PM 2D245A9 PM TYPE: W	/eekly	REMAINING	ACTIVITIES: 3	NEX	T PM DUE: Incompl	ete
PMActivity	Date	Tech	Comments	TotalHrs	DateCompleted	Instruction
fill the gas tank	02/10/2014	- •			02/10/2014	
Check the car is clean on the outside	02/10/2014	- •		0	02/10/2014	
Check the car is clean and smell nice on the inside	02/10/2014	- •		0	02/10/2014	
PMI Attachment Browse_ No file selected. Upload Attachment Important: Upload the file before saving the PMI, otherwise it won't get attached. Uploading of the file won't close the PMI. To close the PMI, mark each activity as completed. Save Cancel						

Once you finish entering all the information, CLICK **Save** to proceed. If you do not wish to make any changes, CLICK **Cancel**. After you CLICK **Save**, you will be returned to the Preventive Maintenance Information Tab and see the updated PMI information in it.

		ASSET #: ID F	-394012	TYP	E: Vehicle	DESCRIPTIO	N: MINI Cooper	LOCATIO	ON: Lima
		PMID	РМ Туре	PM Area	Set Start Date	Date Started	Date Completed	Next PM Due	Remaining
0	×	PM 67BD6A0	Weekly	Tyres	02/10/2014			02/17/2014	1
0	×	PM 6E3A165	Daily	Interior	02/10/2014	02/10/2014	02/10/2014	02/11/2014	0
O	×	PM 6B0D392	Yearly	Engine	02/10/2014			02/10/2015	1

#### 4.3.3 Viewing PM Information

The **Preventive Maintenance Information Tab** of the **Asset View** page contains a detailed record of preventive maintenance information on a certain asset.



MMS-WQM-206 Revision: 06/01/2014

٥		ASSET #: ID F	F394012	ТҮР	E: Vehicle		Asset PMI Current V N: MINI Cooper			ew PM's osed PM's
		PMID	РМ Туре	PM Area	Set Start Date	Date Started	Date Completed	Ne	List of Pe List All Pl	nding PM's M's
0	×	PM 67BD6A0	Weekly	Tyres	02/10/2014			02/1	17/2014	1
9	×	PM 6E3A165	Daily	Interior	02/10/2014	02/10/2014	02/10/2014	02/1	11/2014	0
9	x	PM 6B0D392	Yearly	Engine	02/10/2014			02/1	10/2015	1

View can be sorted by New PMs, Close PMs, Pending PMs, and All PMs.

#### 4.4 REPAIR

When repairs do not require the formal verification process of a **Work Order Request**, they can be recorded in the **Repair Information Tab** of the **Asset View** page.

#### 4.4.1 Entering Repair Information

**Repair Information** can be entered through the **Green Plus Sign icon** under the **Repair Info** column in the **Asset Inventory Status Log**.

			Asset ID	Asset Type	Asset Description	Serial No	Asset Location	Asset Status	PM Info	Usage Info	Repair Info
0	Ø	×	ID 967C251	Crane	Manitowoc 3900W Crawler	MB467LLAN1	Best1 Derrick Barge	Active	e,	Q 🔍	ې 😧



MMS-WQM-206 Revision: 06/01/2014

You are here: OPERATION	S > Maintenance & Repair > Asset Repair Information	
Asset ID*	ID 967C251	
Repair Date*		
🔟 Repair Time		example: 10:30am
Production Status*	Select a value 🔹	
Main Defect Category		
Repair Actions*	Cleaned	
	Rebuilt	
	Repaired	
	Replaced	
	Other	
Repair Status*	Open 🔻	
Repair Tech*	mireauxadmin	
Repair Summary*		
Repair		
Comments		
Repair Total Hours*		
Repair Cost		
Repair Picture(s)	Choose File No file chosen	
Repair Report(s)	Choose File No file chosen	
Save		

**NOTE:** Fields marked with a red asterisk are required.

The **Asset Repair Information** page contains the following fields:

- **Asset ID:** This field is pre-populated depending on which asset was selected from the Asset Status Log.
- **Repair Date:** ENTER the **Date** the asset was repaired.
- **Repair Time:** ENTER the **Time** the asset was repaired.
- **Production Status:** SELECT from the drop down menu: Regular, Line Down, or Low Yield.
- **Main Defect Category**: ENTER a **Category** in which you believe the defect or repair cause fits.
- **Repair Actions:** SELECT from the radio buttons which repair activity took place.
- **Repair Status:** SELECT from the drop down menu the current status of the asset: **Open**, **Completed**, **In-progress**, **Hold**, or **Cancelled**.
- **Repair Tech:** ENTER the name of the **Tech** that repaired the asset.
- **Repair Summary:** ENTER a **Summary** to describe the nature of the repair of the asset.
- **Repair Comments:** DESCRIBE any additional **Details** that are relevant to the repair of the asset.
- **Repair Total Hours:** ENTER the **Number** of **Hours** required to complete the repair of the asset.
- **Repair Cost:** ENTER the total **Cost** of the repair.
- **Repair Pictures(s):** UPLOAD any **Pictures** that are relevant to the repair of the asset.
- **Repair Report(s):** UPLOAD any **Reports** that are relevant to the repair of the asset.



#### 4.4.2 Viewing Repair Information

The **Repair Information Tab** of the **Asset View** page contains a detailed record of the repairs made to an asset.

SSET	INFO	ORMATION	PREVE	NTIVE MAINTEI	VANCE INFOR	MATION	USAGE INF	ORMATION	REPAIR INFOR	RMATION					
								🖨 ASSET # II	0 967C251						
		Repair Date	Repair Time	WO Number	Production Status	Defect Category	Repair Actions	Repair Status	Repair Tech	Repair Summary	Repair Comments	Total Hours	Cost	Repair Picture	Repai Repor
Ø	×	3/14/2012	02:00pm		Regular	A1	Cleaned	Completed	mireauxadmin	cleaned the crane on the daily basis and also provided future instruction to the staff.		1		View	View

You can also access this information directly by CLICKING the **Magnifying Glass icon** in the **Repair Info** column in the **Asset Inventory Status Log**.

			Asset ID	Asset Type	Asset Description	Serial No	Asset Location	Asset Status	PM Info	Usage I	nfo	Repair	Info
•	2	×	ID 967C251	Crane	Manitowoc 3900W Crawler	MB467LLAN1	Best1 Derrick Barge	Active	€	0	0	0	۹,

#### 4.5 USAGE

#### 4.5.1 Entering Usage Information

**Asset Usage** can help track when assets are used in production, on the field, etc. Examples of cases where asset usage are:

- Dive Helmet issued to a Diver
- Compressor issued to a Job
- Truck issued to a Driver
- Laptop issued to an Employee

**Usage Information** can be updated using the **Green Plus Sign icon** in the column under **Usage Info** in the **Asset Inventory Status Log**.





MMS-WQM-206 Revision: 06/01/2014

Asset ID:*	ID 967C251		
	СНЕСК ОИТ		CHECK IN
Start Tech:	Choose an Employee Name 💌	Stop Tech:	Choose an Employee Name
Start Date:*		Stop Date:	
Start Time:		Stop Time:	
	example: 10:30am	_	example: 10:30am
Starting Hours:		Hours Used:	type & press tab for Calculating Total
Total Hours:			
Starting Mileage:		Mileage Used:	
Starting mileage.		- Mileage Used.	type & press tab for Calculating Total
Total Mileage:			
		Stop Reason:	
		Stop Summary:	

**NOTE:** Fields marked with a red asterisk are required.

The **Asset Usage Information** page contains the following fields:

• **Asset ID:** This field is pre-populated depending on which asset was selected from the Asset Status Log.

#### **CHECK OUT FIELDS:**

- **Start Tech:** SELECT from the drop down menu the **Name** of the employee that commissioned the asset for use.
- **Start Date:** ENTER the **Date** the asset was first put into service.
- **Start Time:** ENTER the **Time** the asset was first put into service.
- **Starting Hours:** The **Starting Hours** of the asset are entered on the **Asset Usage Information** page. This value is pre-populated and represents the original hours plus the hours from the last service.
- **Total Hours:** The **Total Hours** of the asset will be calculated based on the **Starting Hours** plus the **Hours Used**.
- **Starting Mileage:** The **Starting Mileage** of the asset are entered on the **Asset Usage Information** page. This value is pre-populated and represents the original hours plus the hours from the last service.
- **Total Mileage:** The **Total Mileage** of the asset will be calculated based on the **Starting Mileage** plus the **Mileage Used**.



#### **CHECK IN FIELDS:**

- **Stop Tech:** SELECT from the drop down menu the **Name** of the employee who returned the asset from service.
- **Stop Date:** ENTER the **Date** the asset was returned from service.
- **Stop Time:** ENTER the **Time** the asset was returned from service.
- Hours Used: ENTER the Hours the asset was used while it was put into service.
- Mileage Used: ENTER the Mileage the asset used while it was put into service.
- **Stop Reason:** DESCRIBE the **Reason** or cause for the asset's return from service.
- **Stop Summary:** WRITE any **Details** relevant to the stoppage of the usage of the asset.

#### 4.5.2 Export/Import Usage Information

You can also export or import the usage information from an Excel spreadsheet.

CLICK the Magnifying Glass icon to access the Asset View page.

			Asset ID	Asset Type	Asset Description	Serial No	Asset Location	Asset Status	PM Info	Usage	Info	Repair	Info
0	2	×	ID 967C251	Crane	Manitowoc 3900W Crawler	MB467LLAN1	Best1 Derrick Barge	Active	€.	0	€	0	0

#### From this screen, you can export or import the usage information for this asset.

						AS	SET # ID 967	C251				
		StartDate	StartingMileage	StartingHours	StartTech	PressNo	StopDate	TotalMileage	TotalHours	StopTech	StopReason	StopSumma
0	x	3/14/2012	0	0	Mireaux User		3/14/2012	0	0	Mireaux User	finish today's work	well-done

#### a. Export

To export the usage information, CLICK "Export to Excel" below the usage information table. Web QMS will ask if you want to open the Excel document or save it to your computer. Please follow the screen instructions to proceed.

Opening Asset		×
	osoft Excel 97-2003 Worksheet (350 bytes)	6
from: http://w What should Firefor	ww.webbasedqms.com x do with this file? Microsoft Excel (default)	-
	matically for files like this from now on.	
	ОК	Cancel

You can also send the Usage information to your email account. Simply CLICK "Email Usage Information to Myself" to enable the email function. The email will be sent to your registered email address only.



MMS-WQM-206 Revision: 06/01/2014

#### b. Import

To import the usage information, CLICK "Import from Excel". A new screen will appear. Use the **Browse** button to locate the document from your computer and CLICK **Upload** to initiate the uploading process.

**NOTE:** To ensure the uploading process is running smoothly, please download and use the Template provided.

		close or Esc Key
	Browse_ No file selected. Upload	
	Please make sure the file meets the following requirements, or it won't be imported:	
	<ol> <li>Comma Separated Values format (.csv)</li> <li>For StartTech and StopTech fields, users' emails are used (the ones their accounts are associated with)</li> </ol>	
4	Download Template	

#### 4.5.3 Viewing Usage Information

The Usage Information Tab of the Asset View page contains a detailed usage history of an asset.

AS	SET	INFORMATIC		/E MAINTENAN	CE INFORMAT	ION US	AGE INFOR	RMATION	REPAIR INFO	RMATION		
					1	ASSET	# ID A7443	BC				
		StartDate	StartingMileage	StartingHours	StartTech	PressNo	StopDate	TotalMileage	TotalHours	StopTech	StopReason	StopSummary
	×	10/07/2013	0	0	Mireaux User			0	0	Mireaux User		

You can also access this information directly by CLICKING the **Magnifying Glass icon** in the **Usage Info** column in the **Asset Inventory Status Log**.

				Asset ID	Asset Type	Asset Description	Serial No	Asset Location	Asset Status	PM Info	Usage I	nfo	Repair	r Info
6	ι.	2	×	ID 967C251	Crane	Manitowoc 3900W Crawler	MB467LLAN1	Best1 Derrick Barge	Active	0	0	۹,	Ο	0

#### 4.6 ADVANCED SEARCH

The **Maintenance Advanced Search** allows you to perform a detailed search of asset maintenance and repair information. To access the **Advanced Search** page, CLICK **Advanced Search** in the Left Menu of the **Maintenance Application** page or in the Top Menu of the Operations Tab.



MMS-WQM-206 Revision: 06/01/2014

Asset Information	OPERATIONS IS HUM	AN RESOURCES SALES	Admin
Asset mormation	5 Calibration	& NCR	
Asset Status Log	Besic Info Calibration Status Report Calibration Advance Search Calibration KPis	NCR Request NCR Status Reports NCR Advanced Search NCR KPis	Certification Type Certification History Certification Advanced Search Certification KPb
Work Order Request	Auditing Services Audit Info Qualified Auditors	Web QMS Software Web QMS Calendar Technical Support	Asset Information
View Work Orders	Audit Colendar	Time Sheet Web GMS Change Log Web GMS Downtime Log	Work Order Request
Advanced Search	Consulting Project Action terms	Web GMS Manuala	Maintenance KPh
Maintenance KPIs	Completed Action Berm All Action Berm		Þ

The screen that opens has a drop down menu which allows selecting between **Asset & Work Order Search** and **Asset & PM Info Search**.

You are here: OPERATIONS > Mai	intenance & Repair > Advanced Search
ADVANCED SEARCI	H PAGES
Asset & Work Order Search 💌	Go
Asset & Work Order Search Asset & PM Info Search	

Once you SELECT an option, a page will appear that shows advanced search fields which will be used to search for maintenance of an asset or equipment.

fou are here: OPERATIONS > Maintenance & Repair > Maintenance Advanced Search 2 MAINTENANCE ADVANCED SEARCH					
Asset Information					
<any status=""> <ul> <li><any area="" department="" or=""></any></li> </ul> <li>On</li> </any>	Asset Type:				



ENTER parameters or SELECT information to filter your results.

The **Asset Information** section contains the following filters:

- **Asset ID:** ENTER the unique **Identifying Number** associated with the asset you would like to view.
- Asset Type: SELECT the Type of asset you would like to view.
- **Asset Status:** SELECT **Active** to view a list of all assets currently in use. SELECT **Inactive** to view all assets not currently in use. SELECT **Retired** to view all assets which are no longer used.
- **Location:** SELECT the **Facility** where the equipment you would like to view is located. The Department or Area field will populate with options depending on this choice.
- **Department or Area:** SELECT from the drop down menu the **Department** or **Area**. The options will vary according to the choice made in the **Location** field.
- **Owner Asset ID #:** ENTER the **Owner Asset ID** to narrow your search.
- Serial Number: ENTER the Serial Number of the asset to narrow your search.
- Model: ENTER the Model Name and/or number of the asset to narrow your search.
- **Product Line:** ENTER the **Product Line** that the asset belongs to, or is used in, to narrow your search.
- **Product P/N:** If the asset is used to make specific products, ENTER the **Part Numbers** associated with them to narrow your search.
- **Manufacturer Name:** ENTER the **Name** of the company that manufactured the asset to narrow your search.
- **Date Built:** SPECIFY the **Date** the asset was built to narrow your search.
- **Date Acquired:** SPECIFY the **Date** the asset was acquired to narrow your search.
- **Owner/Assigned to**: SELECT the **Owner** or assignee of the asset from the drop down menu to narrow your search.

The Work Order Information section contains:

- Work Order Number: ENTER the work order number to narrow your search.
- **Date:** ENTER the date of the issue to narrow your search.
- Work Order Status: ENTER the Current Status of the work order you are looking for.
- **Individual Item:** ENTER the name of the item repaired, if not an asset.
- **Issue Date From:** ENTER the **Beginning of a Range of Dates** in which the work order you are looking for may have been issued. (Must be used in conjunction with **Issue Date To**.)
- **Issue Date To:** ENTER the **End of a Range of Dates** in which the work order you are looking for may have been issued. (Must be used in conjunction with **Issue Date From**.)
- **Repaired Date From:** ENTER the **Beginning of a Range of Dates** in which the work order you are looking for may have been repaired. (Must be used in conjunction with **Repaired Date To**.)
- **Repaired Date To:** ENTER the **End of a Range of Dates** in which the work order you are looking for may have been repaired. (Must be used in conjunction with **Repaired Date From**.)
- **Pending By**: SELECT from the drop down menu the **User** who performed the Pending stage of the work order you are looking for.
- **Repaired By:** SELECT from the drop down menu the **User** who performed the Repair stage of the work order you are looking for.





- Verified By: SELECT from the drop down menu the User who performed the Verify & Close stage of the work order you are looking for.
- **Problem Summary:** ENTER **Keywords** which might appear in a brief description of the problem addressed by the work order you are looking for.
- **Description of Problem:** ENTER **Keywords** which might appear in a detailed description of the problem addressed by the work order you are looking for.

When you finish setting up all the desired search criteria, CLICK **Submit for Search** to proceed. The search results will be shown on the lower part of the page.

	You are here: OPERATIONS > ADVANCED SEAR Asset & Work Order Search Asset & Work Order Search Asset & PM Info Search			Search	
	NS > Maintenance & Repair > Maintenance E ADVANCED SEARCH	Advanced Search			
		2			
Asset ID:		÷	Asset Type:	<all type=""></all>	•
Asset Status:	<any status=""></any>		Location:	<all locations=""></all>	•
Department or Area:	<any area="" department="" or=""></any>		Owner Assest ID #:		
Serial Number:			🔟 Model:		
Product Line:			Product P/N:		
Manufacturer Name:			Date Built:		
Date Acquired:			Owner/Assigned To:	<all></all>	•
Maintenance Inform	ation				
PM ID:			PM Type:		
Next PM Due:			Date:		
Submit for Search					

The Maintenance Information section contains:

- **PM ID:** ENTER the unique **Identifying Number** associated with the PM, given when the PM was created, to narrow your search.
- **PM Type:** ENTER the **Type** of PM you would like to view.
- Next PM Due: ENTER the Date when the PMs you would like to view are next due.
- **Date:** ENTER the **Date** when the PM was entered.

When you finish setting up all the desired search criteria, CLICK **Submit for Search** to proceed. The search results will be shown on the lower part of the page.



#### 4.7 MAINTENANCE KEY PERFORMANCE INDICATORS (KPIS)

Key Performance Indicators (KPIs) represent information from the Maintenance Application in real time, displaying Work Order, Preventive Maintenance, and Repair information in a graphical format.

To access the **Maintenance KPIs** page, CLICK **Maintenance KPIs** in the Left Menu of the **Maintenance Application** page or in the Top Menu of the Operations Tab.

Asset Information	OPERATIONS IS HUM	OPERATIONS IS HUMAN RESOURCES SALES Admin		
Asset mornation	Stalibration	B NCR	Certification	
Asset Status Log	Basic Info Calibration Status Report Calibration Advance Search Calibration KPhs	NCR Request NCR Status Reports NCR Advanced Search NCR KPIs	Certification Type Certification History Certification Advanced Search Certification KPIs	
Work Order Request	Auditing Services Auditing Services Auditing	Web QMIS Software Web QMIS Calendar Technical Support	Asset Information	
View Work Orders	Audt Calendar	Time Sheet Web GMS Change Log Web GMS Downtime Log	Work Order Request View Work Orders Advanced Search	
Advanced Search	Consulting	Web GMS Manuala	Maintenance KPhs	
Maintenance KPIs	Project Action Berns Completed Action Berns All Action Berns		5	

The following page will appear:

You are here: OPERATIONS > Maintenance & Repair > Maintenance KPIs
MAINTENANCE & REPAIR KEY PERFORMANCE INDICATOR
Preventive Maintenance & Repair KPIs Go Preventive Maintenance & Repair KPIs Work Order KPIs

Maintenance KPIs are tracked in two subsets of data: **Preventive Maintenance & Repair KPIs** and **Work Order KPIs**.

#### 4.7.1 Preventive Maintenance & Repair KPIs

To view KPIs which display information about your company's preventive maintenance and repairs, CLICK **Preventive Maintenance & Repair KPIs** from the drop down menu. The following page will appear:

You are here: OPERATIONS > Maintenance & Repair > Maintenance KPIs > EQUIPMENT KPIS				
PREVENTIVE MAINTENANCE & REPAIR KEY PERFORMANCE INDICATORS				
Asset Status	Asset Type		Location	Department
All	All	•	All	All
Run Report and	Chart			

If you wish to view KPIs for the whole set of data, CLICK **Run Report and Chart.** If, however, you wish to view a subset of KPI data, you can narrow the range of information used in creating the KPI graphs by using the available filters, which are as follows:

- Asset Status: SELECT the asset Status (Active, Inactive, or Retired).
- Asset Type: SELECT the Type of asset or equipment.
- **Location**: SELECT the **Location** of the assets.
- **Department**: SELECT the **Department** within that location.



Once you have narrowed the range of information, CLICK **Run Report and Chart.** At the top of the page, you will see a report containing information about the assets matching your filter criteria.

1 2 3					
AssetID	Asset Type	Status	Location	Department	Description
CR 22	Chart Recorder	Active	Houma	OP&A	5000 lbs
ID 164F2A4	Vehicle	Active	Houston	Finance	2011 BMW 328i Sedan
ID 30E1085	Pump	Active	Best1 Derrick Barge	Deck	Fire Pump
ID 7807D6D	Computer	Active	Lima	Operations	Laptop
ID 7870AE6	Air Hoist	Active	Best1 Derrick Barge	Deck	drilling tool set 101

If you wish to further analyze the data, download this report as an Excel spreadsheet by CLICKING **Excel.** 

Kun Report and Chart       1     2     3     4				
AssetID	Asset Type			
CR 22	Chart Recorder			
ID 164F2A4	Vehicle			
ID 30E1085	Pump			
ID 39DC75E	Air Hoist			
ID 7807D6D	Computer			
Excel				

Below the report are several graphs which display real-time information about your company's KPIs, which may include:

• **Incomplete PM per Location:** Shows how many scheduled preventive maintenance instances have not been completed per location.





• **Completed PM per Location:** Shows how many scheduled preventive maintenance instances have been completed per location.



• **PM Hours per Location:** Shows how many hours have been spent on preventive maintenance per location.




• **PM Hours per Month:** Shows how many hours have been spent on preventive maintenance per month.



• **Repair Hours per Location:** Shows how many hours have been spent on repairs per location.







• **Repair Cost per Location:** Shows how much has been spent on repairs per location.

**NOTE:** If a chart does not display it may be because no data is available for the filters used.

### 4.7.2 Work Order KPIs

To view KPIs which display information about your company's work orders, CLICK **Work Order KPIs** from the **Maintenance & Repair Key Performance Indicators** page. The following page will appear:

You are here: OPERATIONS > Maintenance & Repair > Maintenance KPIs > WORK ORDER KPIS WORK ORDER KEY PERFORMANCE INDICATORS							
Asset Status All Entered Date From Run Report and Chart	Asset Type All  Entered Date To	Location All  Closed Date From		Work Order Status			

If you wish to view KPIs for the whole set of data, CLICK **Run Report and Chart.** If, however, you wish to view a subset of KPI data, you can narrow the range of information used in creating the KPI graphs by using the available filters, which are as follows:

- Asset Status: SELECT the asset Status (Active, Inactive, or Retired).
- **Asset Type**: SELECT the **Type** of asset or equipment.
- **Location**: SELECT the **Location** of the assets.
- **Department**: SELECT the **Department** within that location.
- Work Order Status: SELECT the Status of the work orders.
- **Entered Date From:** ENTER the **Start of a Time Range** during which work order whose KPI data you wish to view is entered from. (Must be used in conjunction with **Entered Date To**.)
- **Entered Date To:** ENTER the **End of a Time Range** during which work order whose KPI data you wish to view is entered to. (Must be used in conjunction with **Entered Date From**.)
- **Closed Date From:** ENTER the **Start of a Time Range** during which work order whose KPI data you wish to view is closed from. (Must be used in conjunction with **Closed Date To**.)



• **Closed Date To:** ENTER the **End of a Time Range** during which work order whose KPI data you wish to view is closed to. (Must be used in conjunction with **Closed Date From**.)

Once you have narrowed down your field, CLICK **Run Report and Chart.** At the top of the page, you will see a report containing information about the assets matching your filter criteria.

1									
	WO Status	Entered Date	Problem Summary	Problem Description	AssetID	Asset Type	Location	Department	Asset Description
WO25ABFBA	4	11/18/2012 12:00:00 AM	ding on side	ding on the passenger side	ID 164F2A4	Vehicle	Houston	Finance	2011 BMW 328i Sedan
WO382B613	4	12/3/2012 12:00:00 AM	Low tire pressure	System did not advice and tire low.	ID 164F2A4	Vehicle	Houston	Finance	2011 BMW 328i Sedan
WOE62115F	4	1/24/2013 12:00:00 AM	SLAs missed for current month	SLAs missed for current month	ID 164F2A4	Vehicle	Houston	Finance	2011 BMW 328i Sedan
WOEBE1AF2	4	1/24/2013 12:00:00 AM	Testing new asset	Testing new asset	ID 164F2A4	Vehicle	Houston	Finance	2011 BMW 328i Sedan

If you wish to further analyze the data, download this report as an Excel spreadsheet by CLICKING **Excel.** 

1 2 3 4						
AssetID	Asset Type					
CR 22	Chart Recorder					
ID 164F2A4	Vehicle					
ID 30E1085	Pump					
ID 39DC75E	Air Hoist					
ID 7807D6D	Computer					

Below the report are several graphs which display real-time information about your company's KPIs, which may include:



• **Total Work Orders by Location:** Shows how many work orders have been filed at each location.



• **Aging of Open Work Orders (Days):** Shows how many days open work orders have remained open.







• **Turn-around time of closed work orders:** Shows how many days it took to complete closed work orders.



### 4.8 MAINTENANCE ADMINISTRATION

Administration of Maintenance variables is done through the **Organization Variables** page. This page allows the Administrator to change options throughout the **Maintenance Application** and to set up email reminders. The Administrator role is required in order to update the **Organization Variables** page. The **Organization Variables** page can be located on the **Admin Tab** of the Top Menu of Web QMS.

Basic Features						Admin	5	Search
Site Settings	Page Management	Security Roles	User Accounts	TE Site Log	500 Dati Creat	Site Settings	Page Management	🍇 Security Roles
File Manager	Racycle (M	E-strf Varour	Chine .	Languages	Title Without	Ser Accounts	Organization Variables	🏨 Site Log
Extensions	Web QMIS	Search Tragere	taxonomy	Solutiona Capitoan	u. Lias	Bulk Email	- File Manager	Recycle Bin Anguages
Cryanization Vanables	Calibration E mail Advan	Calibration User Location Setting	Cust Admin (Litt Received ar and	Maintenance User Location Setting	FM Activity Tasks	X Site Wizard	Extensions	B Web QMS Registratio
Mantanance Ernal	Presentare Mandreaux a Trans	Weet Order Email	Escalation Email			Search Engine Sitemap	• Taxonomy	Solutions Explorer
	Basic Peatures En Sanga Fin Maage Entennes	Basic Peetures Dis Schuluy Page Mangement Peter Schuluy Dis Constraints Peter Schuluy Dis Constraints Distributions Distr	Basic Peetures       Basic Pe	Basic Peatures       Dire Statistys     Page Management     Social Palais     Social Palais       Piet Managet     Bary the bit     Dire Volume     Social Palais       Piet Managet     Bary the bit     Dire Volume     Social Palais       Piet Managet     Bary the bit     Dire Volume     Social Palais       Piet Managet     Piet Data     Bary the bit     Dire Volume       Piet Managet     Piet Data     Bary the bit Palais     Dire managet       Piet Managet     Piet Data     Galantine User     Dire All of the Barnether of Ba	Basic Features       Dis Actions     Page Management     Security Rains     Dis Actions     Sin Age       Dis Actions     Security Rains     Sin Actions     Sin Actions     Sin Age       Plat Rainsyn     Security Rains     Sin Actions     Sin Actions     Sin Actions       Plat Rainsyn     Sin Actions     Sin Actions     Sin Actions     Sin Actions       Plat Rainsyn     Sin Actions     Sin Actions     Sin Actions     Sin Actions       Plat Rainsyn     Sin Actions     Sin Actions     Sin Actions     Sin Actions       Plat Rainsyn     Sin Actions     Sin Actions     Sin Actions     Sin Actions       Plat Rainsyn     Sin Actions     Sin Actions     Sin Actions     Sin Actions       Plat Rainsyn     Sin Actions     Sin Actions     Sin Actions     Sin Actions       Plat Rainsyn     Sin Actions     Sin Actions     Sin Actions     Sin Actions       Plat Rainsyn     Sin Actions     Sin Actions     Sin Actions     Sin Actions       Plat Rainsyn     Sin Actions     Sin Actions     Sin Actions     Sin Actions       Plat Rainsyn     Sin Actions     Sin Actions     Sin Actions     Sin Actions       Plat Rainsyn     Sin Actions     Sin Actions     Sin Actions     Sin Actions       Plat Rain	Basic Peatures       Dis Entropy     Page Management     Since Fellow     Since Fellow     Since Fellow       Pine Management     Since Fellow     Since Fellow     Since Fellow     Since Fellow       Pine Management     Since Fellow     Since Fellow     Since Fellow     Since Fellow       Pine Management     Since Fellow     Since Fellow     Since Fellow     Since Fellow       Pine Management     Since Fellow     Since Fellow     Since Fellow     Since Fellow       Velocities     Velocities     Since Fellow     Since Fellow     Since Fellow       Velocities     Velocities     Since Fellow     Since Fellow     Since Fellow       Velocities     Velocities     Since Fellow     Since Fellow     Since Fellow       Velocities     Since Fellow     Since Fellow     Since Fellow     Fellow       Velocities     Since Fellow     Since Fellow     Since Fellow     Fellow       Velocities     Fellow     Since Fellow     Since Fellow     Fellow       Velocities     Fellow     Fellow     Since Fellow     Fellow	Basic Features       Admining         Dis Active       Provide Ministry       Provide Ministry	Basic Features       Admin       Admin       State Settings       Page Management         File Brage       File Brage

In the Left Menu of the **Organization Variables** page, locate the **Maintenance Administration** drop down menu. This menu will allow you to change options throughout the Maintenance Application.

This menu contains the following options:



MMS-WQM-206 Revision: 06/01/2014



- Asset Status
- Asset Types
- Assign User Asset Locations
- Assign User WO Locations
- Department
- Locations
- PM Activity Tasks
- PM Types
- PM Areas
- Setup PM Email Reminder
- Setup WO Email Reminder
- WO Priority

SELECT each option to add, edit, or delete values.

### 4.8.1 Adding/Editing/Deleting An Asset Status

SELECT **Asset Status** in the Maintenance Administration drop down menu, then CLICK **Go**. The following will appear:



CLICK the **Add** button to add another value, i.e. Active, to the Asset Status list. ENTER the value to be added into the **Value** field. CLICK **Save.** 



You are here: Admin > Organization Variables	You are here: Admin > Organization Variables ORGANIZATION VARIABLES Value	You are here: Admin > Organization Variables
Add Asset Status X Active X Inactive X Retired	Save     Cancel       Add     Asset Status	Add Asset Status Active X Inactive X etired

To edit or delete an existing value from the Asset Status list:

- **Edit:** CLICKING the **Manage Yellow Pencil icon** will allow you to edit an existing Asset Status value.
- **Delete:** CLICKING the **Red X Delete icon** will allow you to delete an existing Asset Status value.

### 4.8.2 Adding/Editing/Deleting An Asset Type

SELECT **Asset Types** in the drop down menu, then CLICK **Go**. The following page will appear:



CLICK the **Add** button to add another value, i.e. "Saw," to the Asset Types drop down menu. ENTER the value to be added into the **Value** field. CLICK **Save**.



To edit or delete an existing value from the Asset Types list:

- **Edit:** CLICKING the **Manage Yellow Pencil icon** will allow you to edit an existing Asset Types value.
- **Delete:** CLICKING the **Red X Delete icon** will allow you to delete an existing Asset Types value.

### 4.8.3 Adding/Editing/Deleting Assigned User Locations

SELECT Assign User Asset Locations in the list, then CLICK Go.



MMS-WQM-206 Revision: 06/01/2014



The following page will appear:

You are here: Admin > Organization Variables > MTN Tech Locations										
MAINTENANCE ASSET USER LOCATION SETTING										
User:	Select User									
Location:	Best1 Derrick Barge									
	Houma									
	Houston									
	🗖 Lima									
	Tank Farm									
Submit Action										

- **User:** SELECT the **Desired User** from the drop down menu. These are users with the Maintenance Tech role.
- **Location**: CHECK the **location(s)** you wish to assign to the user selected above.
- **NOTE:** The **Locations** you SELECT will replace the current assigned locations for the selected user. If you SELECT **No Location** for the user, all locations for that user will be removed.

#### 4.8.4 Adding/Editing/Deleting Assigned User WO Locations

SELECT Assign User WO Locations in the drop down menu, then CLICK Go.

Maintenance Administration
Asset Status
Asset Status
Asset Types
Assign User Asset Locations
Assign User WO Locations
Department k
Locations
PM Activity Tasks
PM Types
Setup PM E-mail Reminder
Setup WO Email Reminder
WO Priority



You are here: Admin > Organization Variables > WO Locations WO User Location Setting							
User:	Select User	-					
Location:	Best1 Derrick Barge Hourna Houston Lima Tank Farm						
Submit Action							

- **User:** SELECT the **Desired User** from the drop down menu. These are users with the Maintenance Tech role.
- **Location**: CHECK the **location(s)** you wish to assign to the user selected above.

#### 4.8.5 Adding/Editing/Deleting Departments

SELECT **Department** in the drop down menu, then CLICK **Go**. The following page will appear:



CLICK **Select** next to the location to which the department you wish to manage belongs. This will take you to a page containing a list of departments belonging to this location.

You :	You are here: Admin > Organization Variables										
A	Add										
		Location									
2	×	Best1 Derrick Barge	Select								
2	×	Houma	Select								
	×	Houston	Select								

CLICK the **Add** button to add another value, i.e. "Sales," to the Department list. ENTER the value to be added into the **Value** field. CLICK **Save.** 



MMS-WQM-206 Revision: 06/01/2014

You are here: Admin > Organization Variables ORGANIZATION VARIABLES	You are here: Admin > Organization Variables ORGANIZATION VARIABLES Value Save Cancel
Department	Add
🖉 🗙 Facilities	Department
🖉 🗙 Finance	🖹 🗙 Facilities
Production	🖉 🗙 Finance
	Production
🖉 🗙 Shipping	🖹 🗙 Shipping

To edit or delete an existing value from the Department list:

You are here: Admin > Organization Variables										
Add										
Departmen	t									
Facilities										
🖉 X Finance										
Production										
K hipping										

- Edit: CLICKING the Manage Yellow Pencil icon will allow the editing of the existing locations.
- **Delete**: CLICKING the **Red X Delete icon** will allow the deletion of the existing departments from the list.

#### 4.8.6 Adding/Editing/Deleting Locations

SELECT **Locations** in the drop down menu, then CLICK **Go**. The following page will appear:



CLICK the **Add** button to give the option to add another value to the Locations list. ENTER the value to be added into the **Value** field. CLICK **Save**.



To edit or delete an existing value from the Locations list:





- **Edit:** CLICKING the **Manage Yellow Pencil icon** will allow you to edit an existing value.
- **Delete**: CLICKING the **Red X Delete icon** will allow you to delete an existing value.
- **NOTE:** If you wish to DELETE a location, you must first delete all departments which are associated with that location.

#### 4.8.7 Adding/Editing/Deleting PM Activity Tasks

SELECT **PM Activity Tasks** in the drop down menu, then CLICK **Go**.



The following page will appear:

	ou are here: Admin > Organization Variables > PM Activity Tasks ADD/EDIT PM ACTIVITY TASKS											
Add F	dd PM Activity Add Instructions											
		AssetType	PMType	PMArea	PMActivity	Weight	Instruction					
Edit	Delete	Air Hoist	18 Month	AUXILIARY HYDRAULICS	Test	30	i					
Edit	Delete	Air Hoist	18 Month	ELECTRICAL	Change filter	10	i					
Edit	Delete	Air Hoist	18 Month	ELECTRICAL	Paint the warning signs	15						

To add a PM Activity Task, CLICK the **Add PM Activity** hyperlink.



MMS-WQM-206 Revision: 06/01/2014

	Organization Variables > PM ACTIVI I ACTIVITY TASK	'Y TASKS INFO
Asset Type:	Please Select	•
PM Type:	Please Select	•
PM Area:	Please Select 🔓	•
PM Activity:		
Weight:		
Instruction:	Please Select	•
Save		

- **Asset Type:** SELECT the Type of Asset from the drop down menu.
- **PM Type:** SELECT the **PM type** from the list of PM types.
- **PM Area:** SELECT the **PM area** from the list of PM areas, if applicable.
- **PM Activity:** ENTER a **Description** of the activity.
- **Weight:** You may prioritize the activity tasks of an asset by ENTERING a **Number** to each one. Start with 10 and ADD numbers in increments of 10, such as 10, 20, 30, etc. This will allow you to insert new activities later on without having to rearrange all the given weights.
- **Instruction:** SELECT from the drop down menu the **Instruction Document** associated to the PM activity task, if available.

#### CLICK **Save** to proceed.

To edit or delete an existing value from the PM Activity Tasks list:

• **Edit:** CLICK the **Edit** link in the row of the PM Activity Task you wish to manage.

You are here: Admin > Organization Variables > PM Activity Tasks ADD/EDIT PM ACTIVITY TASKS						
Add PM Activit	ty Add Instructions					
	AssetType	РМТуре	PMArea	PMActivity	Weight	Instruction
Edit Delete	Air Hoist	18 Month	AUXILIARY HYDRAULICS	Test	30	i
Edit Delete	Air Hoist	18 Month	ELECTRICAL	Change filter	10	1
Edit Delete	Air Hoist	18 Month	ELECTRICAL	Paint the warning signs	15	

The editing window will open within the list of PM Activity Tasks:



You are here: Admin >	You are here: Admin > Organization Variables > PM ACTIVITY TASKS INFO		
ADD EDIT PN	ADD EDIT PM ACTIVITY TASK		
Asset Type:	Air Hoist	T	
PM Type:	18 Month		
	18 Month	•	
PM Area:	AUXILIARY HYDRAULICS		
PM Activity:	Test		
Weight:	30		
Instruction:	Test Document 2.docx		
Save			

You can edit the information in the form directly. CLICK **Save** to proceed.

• **Delete**: CLICK **Delete** in the row of the PM Activity Task you wish to manage. The PM Activity Task will be removed from the system.

To attach a Work Instruction, CLICK the **Add Instructions** hyperlink.

		oad
Upload	Choose File No file chosen	Upload Go back to PM Activity Tasks
	Name	Mime/Type
Delete	Name DiskMaintRev_Win7_000.pdf	Mime/Type application/pdf
Delete Delete	101000	

CLICK **Browse** to locate the file and SELECT the document from your local computer, then CLICK **Upload**.

To DELETE an existing document, CLICK **Delete** in the row of the document you wish to remove.

#### 4.8.8 Adding/Editing PM Types

SELECT **PM Types** in the drop down menu, then CLICK **Go**.

Maintenance Administration
Asset Status 💌
Asset Status Asset Types Assign User Asset Locations Assign User WO Locations Department Locations
PM Astivity Tasks
PM Types
Secop r M E-mail Reminder Setup WO Email Reminder WO Priority



MMS-WQM-206 Revision: 06/01/2014

ADD PREVENTIVE	MAINTENANCE TYPE	S
PM Type:•		
PM Cycle Type:	© Days	
	e Hours	
	Mileages	
PM Cycle (in Hours):•		
Threshold for coming due:		
Existing PM Types (Review before creating new ones):	18 Month (547 days)     90,000 Miles (300 days)     Min Hours (8 Hours)     Monthly (30 days)     Quaterly (90 days)     test (10 days)     Yearly (365 days)	2 Year (730 days)         Daily (1 days)         Min Mileage (100 Mileages)         Pre-Use (0 days)         Semi annual (182 days)         Weekly (7 days)
Submit		

To add a PM type, FILL OUT the form, and then CLICK **Submit**.

- **PM Type:** ENTER the specific **PM Type** to define its cycle time.
- **PM Cycle Type:** SELECT one of the options available (**days**, **hours**, **mileage**)
- **PM Cycle (Days/Hours/Mileage):** ENTER the **number** of the days/hours/mileage in this cycle.
- **NOTE:** To avoid creating duplicate PM Types, review the list of existing PM Types before adding a new PM Type.

### 4.8.9 Adding/Editing/Deleting PM Areas

SELECT **PM Areas** in the drop down menu, then CLICK **Go**.

Maintenance Administration	n
PM Areas	-
Asset Status	٦
Asset Types	
Assign User Asset Locations	
Assign User WO Locations	
Department	
Locations	
PM Activity Tasks	
PM Types	
PM Areas	
Secup FIVI É-mail Reminder	
Setup WO Email Reminder	
WO Priority	

CLICK the **Add** button which will give the option to add another value to the Asset Type list. ENTER the value to be added into the **Value** field. CLICK **Save**.

	You		here: Admin > Organization Variab		
You are here: Admin > Organization Variable	Sector Concerns	Val	dd	Save Cancel	
Asset Types				Asset Types	
	Select	2	×	Air Hoist	Select
Barge Equipment-Fire Pump	Select	2	×	Barge Equipment-Fire Pump	Select
🖉 🗙 Boiler	Select	2	×	Boiler	Select



To edit or delete an existing value from the Areas list:

You are here: Admin > Organization Variat	
Asset Types	
🖉 🕻 Air Hoist	Select
🖉 🗙 Barge Equipment-Fire Pump	Select
🛛 🗙 Foiler	Select

- Edit: CLICKING the Manage Yellow Pencil icon allows you to edit an existing value.
- **Delete**: CLICKING the **Red X Delete icon** allows you to delete an existing value.

SELECT the Asset Type where you wish to add an Area/Department and CLICK the **Add** button:

	You are here: Admin > Organization Variables	You are here: Admin > Organization Variables	You are here: Admin > Organization Variables
Select )	Add Department X Engine X Transmission	Add Department X Engine X Transmission	Add Department Engine

To edit or delete an existing value from the Areas list:

- **Edit:** CLICKING the **Manage Yellow Pencil icon** allows you to edit an existing value.
- **Delete**: CLICKING the **Red X Delete icon** allows you to delete an existing value.

#### 4.8.10 Setup PM E-Mail Reminder

SELECT **Setup PM E-mail Reminder** in the drop down menu, then CLICK **Go**.





MMS-WQM-206 Revision: 06/01/2014

You are here: Admin > Organization Va	riables > Maintenance Email Admin
MAINTENANCE EMAIL	REMINDER
Email From:	admin@webbasedqms.com
Email Subject:*	Preventive Maintenance Reminder
Email Reminder Message:*	
	x <sup>*</sup> ×. ¶. 🖺 🚍 🗈 🕒 🔚
	Paragraph St   Font Name  Real
	B I ∐ abe 등 등 등 등 등 😹 🞼 🛱 💱 🗄 🖽 🔛 ₩30
	A 🔹 🗞 🔹 Apply CSS Cl 👻 💕
	Ω • ■ • 🖾 • 🖾 😹   ⅔ ⅔   ⅔ • 😌 🍺 🎯 • 🕩
	Dear \$(FirstName) \$(LastName):
	This is a message from the Preventive Maintenance (PM) program of Web QMS. The following is a status report of all PM that is either overdue or coming due in the next 30 days. Please ensure that overdue PM is taken care as soon as possible in order to avoid disruption to operations.
	Design
Send to Maintenance Admin (admin for all locations):	● Yes ◎ No
Select a User to Escalate Email To:	Mireaux Partner
Number of Days Before Maintenance Due Date:*	30
Save	

- **Email From:** ENTER the email **Address** that you would like to appear on the email reminders.
- **Email Subject:** ENTER the email **Subject**.
- **Email Reminder Message:** This field is pre-populated with an automated reminder message. You may adapt it as necessary; however, you should not edit any areas which look similar to**\$(this)**.
- Send to Maintenance Admin (admin for all locations): SELECT whether the Maintenance Admin should also receive reminder emails.
- Select a User to Escalate Email to: If you want a manager or other member of your organization who does not have the Maintenance Admin or Maintenance Tech role to also get the reminder emails, select it here.
- **Number of Days Before Maintenance Due Date:** ENTER the number of days you would like for the reminder to look ahead.

#### 4.8.11 Setup WO E-Mail Reminder

SELECT **Setup WO E-mail Reminder** in the drop down menu, then CLICK **Go**.



MMS-WQM-206 Revision: 06/01/2014

Maintenance Administration
Asset Status
Asset Status
Asset Types
Assign User Asset Locations
Assign User WO Locations
Department
Locations
PM Activity Tasks
PM Types
Setup PM E-mail Reminder
Setup WO Email Reminder 🔿
Wo monity by

You are here: Admin > Organization V	/ariables > Word Order Email Admin					
WORK ORDER ADMIN - EDIT REMINDER AND ESCALATION EMAIL						
Email From:	admin@webbasedqms.com					
Email Subject:*	Work Order Reminder1					
Email Reminder Message:*						
	Paragraph St   Font Name  Real					
	B Z U abe ≡ ≡ ≡ ≡ ≡ ≡ □ □ □ □ □					
	A • 🗞 • Apply CSS Cl • 💇 •					
	<u>Ω • □ • □ • □ • [3] № 28   № • 9</u>					
	Dear \$(LastName),\$(FirstName): This is a message from the Work Order program of WebQMS Demo Site. The following is a status report of all active Work Orders that may need your attention. Please ensure these Work Orders are close out in a timely manner. \$(NotClosed)					
	✓ Design ♦> HTML Words: 68 Characters: 389					
Send to Global Maintenance Admin (admin for all locations)						
Select a User to Escalate Email To:	Choose One					
Save						

- **Email From:** ENTER the email **Address** that you would like to appear on the email reminders.
- **Email Subject:** ENTER the email **Subject**.
- **Email Reminder Message:** This field is pre-populated with an automated reminder message. You may adapt it as necessary; however, you should not edit any areas which look similar to **\$(this)**.
- Send to Global Maintenance Admin (admin for all locations): SELECT whether the Maintenance Admin should also receive reminder emails.
- Select a User to Escalate Email to: If you want a manager or other member of your organization who does not have the Maintenance Admin or Maintenance Tech role to also get the reminder emails, you can select them here.



### 4.8.12 WO Priority

SELECT **WO Priority** in the drop down menu, then CLICK **Go**. The following page will appear:

Maintenance Administration
Asset Status
Asset Status
Asset Types
Assign User Asset Locations
Department
Locations
PM Activity Tasks
PM Types
Setup PM E-mail Reminder
Stop WO Email Reminder
WO Priority

CLICK the **Add** button to give the option to add another value to the WO Priority list. ENTER the value to be added into the **Value** field. CLICK **Save**.

	You are here: Admin > Organization Variables		
You are here: Admin > Organization Variables			
Add	Add WO Priority		
WO Priority Critical	🖉 🗙 Critical		
🖻 🗙 High	<ul> <li>K High</li> <li>K Low</li> </ul>		
<ul> <li>K Low</li> <li>K Medium</li> </ul>	K Medium		

To edit or delete an existing value from the WO Priority list:



- **Edit:** CLICKING the **Manage Yellow Pencil icon** allows you to edit an existing value.
- **Delete**: CLICKING the **Red X Delete icon** allows you to delete an existing value.

### 5.0 REVISION LOG

DATE	SECTION	DESCRIPTION OF CHANGE	APPROVED BY
02/06/2010	All	Original Release of MMS-WQM-212 Maintenance Admin Guide and MMS-WQM-213 Maintenance User Guide	M. Boudreaux
01/16/2012	All	MMS-WQM-212 and MMS-WQM-2013 formatting, inserted many screenshot, and corrected a lot of errors throughout the content, picture editing.	M. Boudreaux
3/14/2012	All	MMS-WQM-212 and MMS-WQM-2013 updated screenshots according to the newest changes in the system.	M. Boudreaux



MMS-WQM-206 Revision: 06/01/2014

DATE	SECTION	DESCRIPTION OF CHANGE	APPROVED BY
04/12/2012	4.4.1	Original Release of MMS-WQM-222 Work Order Admin Guide	M. Boudreaux
07/05/2012	All	MMS-WQM-212 and MMS-WQM-2013 updated to include application enhancements and skin changes.	M. Boudreaux
01/31/2014	All	Revision and integration of MMS-WQM-212, MMS-WQM-213 and MMS-WQM-222. Released as MXM-WQM-506 Maintenance Application Manual.	M. Boudreaux
06/01/2014	All	Revision, editing, and formatting performed throughout the Maintenance Application Manual.	M. Boudreaux



MMS-WQM-206 Revision: 06/01/2014



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