Standard Operating Procedure (SOP)
Creating Work Orders in TMA

SOP No. | AS-0005  | Revision: 0  
Department: Administrative Support  | Date: 5/30/07  
Dept. Head Approval: [Signature] 5/30/07  
Director Approval: [Signature] 5/31/07

Purpose
To establish guidelines for Administrative Support Services on creating work orders in TMA.

Responsibility
1. The following people are responsible for following this SOP.
   1.A. All Administrative Support Services employees.

Definitions
1. TMA: Facilities Management’s computer maintenance management system/work order system.

Procedure
1. Review description of request to make sure the request is clear and all required information is in the request.

2. Is work request accepted or rejected?
   2.A. Accepted; Go to step 3
   2.B. Rejected; Reason is entered on why request was rejected and TMA automatically e-mails requestor.

3. Is all information on request or is additional information needed?
   3.A. No; Contact requestor for any additional information and information is entered in the work order description.
   3.B. Yes; proceed to step 4.

4. Verify building name and room number. If possible try to avoid using “INTERIOR” for the building room number.

5. Enter work order priority based on the priority definitions (see Exhibit A).

6. Enter appropriate work order type.
   6.A. Routine Maintenance (M): Work done on a routine basis and repair work with material costs less than or equal to $250. Funded by operating budget.
   6.B. Repair (R): Repair work with material costs ranging from $250 - $10,000. Funded by the minor repair account.
6.C. **Service/Setup (S):** Chargeable work and work associated with setting up events. Funded by the customer.

6.D. **Vandalism (V):** Work associated with vandalism to WVU property. Funded by the person who did the vandalism if possible. If not funded by operating budget.

6.E. **Life Safety (L):** Work associated with Schirmer Engineering work orders. Funded by deferred maintenance or project funds.

6.F. **Preventative Maintenance (PM):** Scheduled maintenance. Funded by operating budget.

6.G. **Alteration (A):** Small renovation work that is less than $10,000. Funded by the customer.

6.H. **Project (P):** Work orders linked to a project. Funded by project.

7. Enter appropriate account number.

7.A. **Chargeable Work Orders:** Enter the department being charged in the account field.

7.B. **Project Work Orders:** Enter the project account number.

7.C. **Repair Work Orders:** Enter the appropriate minor repair account.

7.D. **Routine Maintenance Work Orders:** Enter shop account of the trade doing the work.

8. If work order is for a project enter project number.

9. Enter appropriate task code based on the type of work requested.

10. Assign the trade who will do the work.

11. Once all entries have been made click on the “OK” button.

12. Zoom to work order.

13. Enter work order status.

14. Make sure work order request date is equal to the current date.
PRIORITY CODES

Priority Codes are used to define the appropriate response time for a job.

• ROUTINE (Blue Priority Code 1)
  Normal maintenance or service item that does not pose an immediate risk to facilities, systems, equipment or components. Warrants scheduled or FIFO action (1 to 2 week response time).

  Examples: PMs, RMs, and project links.

• PLANNED (Green Priority Code 2)
  Work that has been intentionally or unintentionally delayed due to lack of funding, impending asset retirement, awaiting conflict resolution, long-term access issues, or has been subject to other administrative issues or constraints.

  Examples: Work billable to external departments, planned moves or set-ups, signs, name plates, keys and room painting.

• INTEREST (Yellow Priority Code 3)
  Work that does not fit the definition of urgent work but needs to be accomplished in an expedited time frame.

  Examples: Too hot/too cold, lights out, leaky faucet, clogs, unplanned moves or set-ups, and departmental machinery/equipment.

• URGENT (Orange Priority Code 4)
  Warrants expedited action within 24 hours to mitigate the situation before conditions escalate or worsen. Such work may be mission critical, high profile in nature, have a short deadline date, or requested from a high-ranking official such as the University President. Warrants expedited response, 24 to 48 hours.

  Examples: Student requests, political requests, call-outs, steam leaks, breaker failure, roof leaks, and water leaks.

• EMERGENCY (Red Priority Code 5)
  Potential threat to life, property, security or the environment or imminent threat to life, property, security or the environment. Warrants immediate response and mitigation.

  Examples: Power outages, chemical spills, natural gas leaks, fire, major water line breaks, and bomb threats.