

Maximo®

HTM Tech Training Participant Guide

INSPECT INCOMING ASSET

VA



U.S. Department of Veterans Affairs
Veterans Health Administration

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INSPECT INCOMING ASSET

Summary

This lesson provides an overview of activities needed to inspect a received Asset and place it into service.

Learning Objectives

- Identify activities required to inspect an Asset
- Assign Work Orders


Agenda

Topic	Estimated Time
Introduction	10 min
Assign Work Order	05 min
Activity 1: Assign Work Order to Responsible Tech	10 min
TOTAL:	25 min

ACRONYMS USED IN THIS LESSON

Acronym	Description
BSE	Building Services Equipment
HTM	Healthcare Technology Management
NX	Non-Expendable
PPM	Personal Property Management
VAMC	VA Medical Center

INTRODUCTION

Icon	Content
	<p>This lesson uses the Assets application, which is used to receive and track physical Assets (equipment). Maximo automatically generates an Incoming Inspection Work Order for any Asset that has “Inspect Incoming Asset?” set to “Yes.” Once the Asset passes inspection, it is ready to be put into service.</p> <p>In this lesson, you will learn how to:</p> <ul style="list-style-type: none">• Identify activities required to inspect an Asset• Assign Work Orders

Introduction – continued

Icon

Content






Step Number	Description
1.2.1	<p>The Admin, WO Clerk receives the Work Order for an Incoming Asset Inspection in Maximo. The Admin, WO Clerk reviews the Work Order for accuracy and completeness.</p> <p>If the Work Order is accurate and complete, continue to step 1.2.2, Assign Work Order.</p> <p>If the Work Order is not accurate and complete, continue to step 1.2.3, Handle Exception/Correct Work Order.</p> <p>NOTE: For Cleveland FM, the WO Clerk may handle this process in Maximo. In the HTM community, this is limited to an HTM Admin.</p>
1.2.2	<p>The Admin, WO Clerk assigns the Work Order to a tech or person group which leads into process WM-2.3 Execute Work. After the work has been executed:</p> <p>If the Asset passes inspection AND it is an NX Asset, continue to 1.2.5 Notify PPM of Asset Acceptance.</p> <p>If the Asset passes inspection AND it is NOT an NX Asset (i.e., it is a BSE), continue to 1.2.8 Notify Contracting of Asset Acceptance.</p> <p>If the Asset does not pass inspection, continue to step 1.2.4 Handle Exception.</p>
1.2.3	<p>The Admin, WO Clerk handles any exceptions and corrects the Work Order. When the Work Order is accurate and complete, go to step 1.2.2 Assign Work Order.</p>
1.2.4	<p>The Tech handles the exception.</p> <p>If the Tech does NOT want to reject Asset delivery and instead wants to re-inspect the Asset, continue to WM-2.3 Execute Work. After the work has been executed:</p> <p>If the Tech wants to reject the Asset delivery AND the Asset is an NX Asset, continue to 1.2.6 Notify PPM of Asset Rejection.</p> <p>If the Tech wants to reject the Asset delivery AND the Asset is NOT an NX Asset (i.e., it is a BSE), continue to 1.2.7 Notify Contracting of Asset Rejection.</p>
1.2.5	<p>The Admin, WO Clerk notifies PPM of Asset acceptance, which causes the AM-1.1 Receive Asset process to continue.</p>
1.2.6	<p>The Admin, WO Clerk notifies PPM of the Asset's rejection. The process ends.</p>
1.2.7	<p>The Tech notifies Contracting of the Asset's rejection. The process ends.</p>
1.2.8	<p>The Tech notifies Contracting of the Asset's acceptance. The process ends.</p>


Table 1. Inspect Incoming Asset Business Process

Refer to **Appendix A – Inspect Incoming Asset Business Process.**

ASSIGN WORK ORDER

Icon	Content
	<p>To assign Work Orders, follow these steps:</p> <p><i>Step 1.</i> Open the appropriate Work Order in Work Order Tracking to assign a responsible tech.</p> <p><i>Step 2.</i> To assign a responsible tech, select the Select Owner icon from the toolbar and select the appropriate responsible tech.</p>  <p><i>Figure 1. Select Owner Icon from Toolbar</i></p> <p><i>Step 3.</i> Click the Save Work Order  icon on the toolbar. You will learn how to print out Work Orders in Module 2.</p>

ACTIVITY: VIEW RELATED WORK ORDER AND ASSIGN TO RESPONSIBLE TECH

Icon	Content
	<p>Activity: Given a scenario, view Work Orders and assign to a responsible tech.</p> <p>Scenario: <i>As an HTM Tech, you will assign Work Orders to a responsible tech.</i></p> <p>Instructions: Using Maximo, select an Unassigned Work Order from the Unassigned Work Order Portlet on your Start Center. Assign that Work Order to HTMTECH_CLV.</p>

APPENDIX A – INSPECT INCOMING ASSET BUSINESS PROCESS

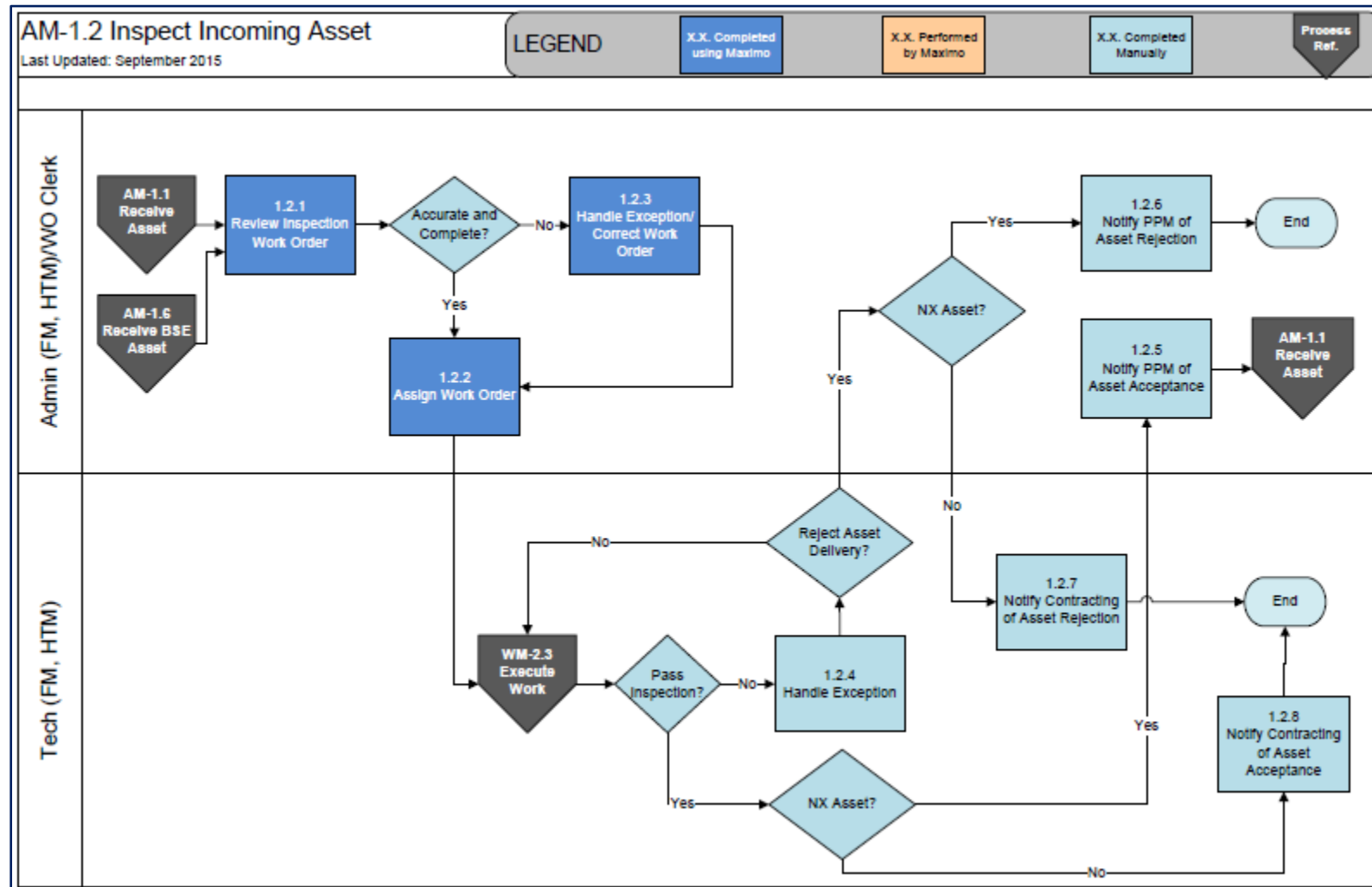


Figure 2. Inspect Incoming Asset Business Process