

Guidelines for Entering Facility Management Software System (FMSS) Data for an Approved Project Management Information System (PMIS) Project Component

The following guidance applies to all approved PMIS project components; it supplements any previous guidance related to an approved PMIS project component. The process will ensure that every PMIS project component will have **one** associated parent component work order from FMSS and every parent component work order in FMSS will have a single associated PMIS project component number. All work described in the PMIS project component will have parallel work identified in the associated parent component work order in FMSS. All approved facility PMIS project components that are going to be formulated or funded in FY 2005 and beyond must align with this guidance. For non-appropriated fund sources, such as Fee Demo, all approved facility PMIS project components being worked on or obligated in FY 2005 and beyond need to follow this guidance. *Parks must add or adjust any FMSS work orders that do not currently align with this guidance.*

Step One: Create a Parent Work Order in FMSS

- Using the Insert icon on the Work Order toolbar select a new work order number using the Auto Number function. Enter the Park Alpha Code in the Location/Asset field in FMSS. Do not change this.
- From PMIS, copy the exact PMIS Project Component Title and paste it into the *Description* field in the parent work order in FMSS. Insert “PMIS” as a prefix to the title.
- The status of the parent component work order should have the default status of “Waiting Approval” (WAPPR) until the project is funded.
- The parent component work order in FMSS should *not* have a work/subwork type or a Work Breakdown Structure (WBS) Component and Sub-Component. The work/subwork type and a Work Breakdown Structure (WBS) Component and Sub-Component will be identified on the child work orders. For this reason, all PMIS project components should have a single parent component work order and at a minimum one child work order in FMSS.
- Enter the PMIS Component Number in the *PMIS Component Number* field in FMSS.

The screenshot shows the 'Work Order Tracking' application window. The interface includes a menu bar (File, Edit, View, Actions, Insert, Navigate, Setup, Help), a toolbar with various icons, and a main data entry area. A left-hand navigation pane lists modules such as Work Orders, PMs, Inventory, Assets, Purchasing, Plans, Labor, Resources, Custom Apps, Utilities, and Setup. The main area contains several input fields and sections:

- Callout A:** Points to the 'Work Order' number field, which contains '504865'.
- Callout B:** Points to the 'Description' field, which contains 'PMIS: Rehabitate West End Trails'.
- Callout C:** Points to the 'Location/Asset' field, which contains 'REDW'.
- Callout D:** Points to the 'Park Alpha Code' field, which contains 'REDW'.
- Callout E:** Points to the 'WBS Component' and 'Sub Component' fields, both of which are empty.

Other visible fields include 'Equipment/Feature', 'Reported By', 'Reported By Date' (9/1/2004 8:57 A), 'Work Phone', 'WO Status' (WAPPR), 'WO Status Date' (9/21/2004 9:32), 'Charge to Store?' (N), 'Work Type', 'Sub Type', 'GL Account' (6420-2005-MAT), 'Warranty Date', 'Quantity', 'Measurement Unit', 'Job Details', 'Park Planning' (with 'PMIS # / Component' set to '79342 / A'), 'Work Prg/Budget', 'Park GPRA Goal #', 'GPRA Goal #', 'GPRA Goal IV', 'Work Category' (9000), 'Work Activity', 'Problem Code', 'Originating WO', and 'Has Follow-up Work?' (Y).

- F. From PMIS, copy the Project Description and paste it in the FMSS *Long Description* field in the parent work order. Add specific information that describes this PMIS project component's work.

The screenshot shows the 'Work Order Tracking' application. The main window displays a work order for 'PMIS: Rehabilitate West End Trails' with location 'Redwood National & State Parks'. A 'Long Description' dialog box is open, containing the text: 'The exact PMIS Project Description must be listed in the Long Description field in the parent work order in FMSS.' A red oval highlights the dialog box, and a red line points from it to a red box containing the letter 'F' at the bottom center of the page.

Reminders for Parent Component Work Orders:

- **Parent work order title = PMIS: project component title**
- **Parent work order has the PMIS component number**
- **Parent work order has the park alpha as the location/asset**
- **Parent work orders have no WBS or work types**

Step Two: Complete Child Work Orders and Associate them to a Parent Work Order

The following steps allow the work described in PMIS to be entered into FMSS as child work orders of the newly created FMSS parent component work order. On the Child Work Order Screen:

- G. Each child work order(s) must include the FMSS Asset Location Number where work is to be performed, the work/subwork type, and the appropriate WBS component/subcomponent (when available).
- H. Separate child work order(s) must be generated for each work/subwork type identified and for each additional WBS component/subcomponent of each asset.

PMIS Project Component = Parent WO: Howland Hill Outdoor School Lodge

The screenshot shows the PMIS Work Order interface. The main form contains the following fields:

- Work Order:** 101352
- Location/ Asset:** REDW, Howland Hill Outdoor School Lodge, 2901
- Equipment/ Feature:** (empty)
- Reported By:** JDDE, **Reported By Date:** 8/5/2002 4:43 P
- WD Status:** WAPPR, **WD Status Date:** 12/1/2004 1:41
- GL Account:** (empty), **Warranty Date:** (empty)
- WBS Component:** (empty), **Quantity:** (empty)
- Sub Component:** (empty), **Measurement Unit:** (empty)
- Work Type:** (empty), **Sub Type:** (empty)
- Park Alpha Code:** REDW

Below the main form are sections for **Job Details**, **Park Planning**, and **Problems/ Follow-up Work**.

Child Work Order

G

The screenshot shows the FMSS Child Work Order interface. The main form contains the following fields:

- Work Order:** 101354
- Location/ Asset:** 4093, Howland Hill Outdoor School Lodge, 2901
- Equipment/ Feature:** (empty)
- Reported By:** (empty), **Reported By Date:** 8/5/2002 4:43 P
- WD Status:** COSTED, **WD Status Date:** 8/30/2002 4:43
- GL Account:** (empty), **Warranty Date:** (empty)
- WBS Component:** A20, **Quantity:** 2
- Sub Component:** A2020, **Measurement Unit:** EA
- Work Type:** FM, **Sub Type:** DM
- Park Alpha Code:** REDW

H

The screenshot shows the FMSS Child Work Order interface. The main form contains the following fields:

- Work Order:** 101353
- Location/ Asset:** 4093, Howland Hill Outdoor School Lodge, 2901
- Equipment/ Feature:** (empty)
- Reported By:** (empty), **Reported By Date:** 8/5/2002 4:43 P
- WD Status:** COSTED, **WD Status Date:** 8/30/2002 4:42
- GL Account:** (empty), **Warranty Date:** (empty)
- WBS Component:** A10, **Quantity:** 2
- Sub Component:** A1010, **Measurement Unit:** EA
- Work Type:** FM, **Sub Type:** DM
- Park Alpha Code:** REDW

H

- I. To attach the child work order to the parent, click on the WWO hierarchy tab. Enter the parent component work order number in the “Belongs To” field of the child work order. If the deficiencies are attached to another parent work order move only the deficiency work order. Do not move the parent. For PMIS project components the parent work order in FMSS is the identifier and the deficiencies being worked on are the children associated to that parent by the “Belongs To” hierarchy. Before you save a parent child component work order, populate the PMIS number and component fields in the child work orders within it’s hierarchy.
- J. When the Parent/Child FMSS work order process is completed, the status of **each** child work order should be identified as “Costed.”

The sum of the costs of the associated child work order(s) in FMSS (from the *Cost Current Estimate at Approval* field) must equal the estimated total cost of the PMIS project component (in the *Funding Component Request Amount*). In some cases, the percentage of the estimated total cost in FMSS for Deferred Maintenance (DM) and Capital Improvement (CI) may not equal the existing percentages for DM and CI (based on the Department of the Interior categories) in the PMIS project component.

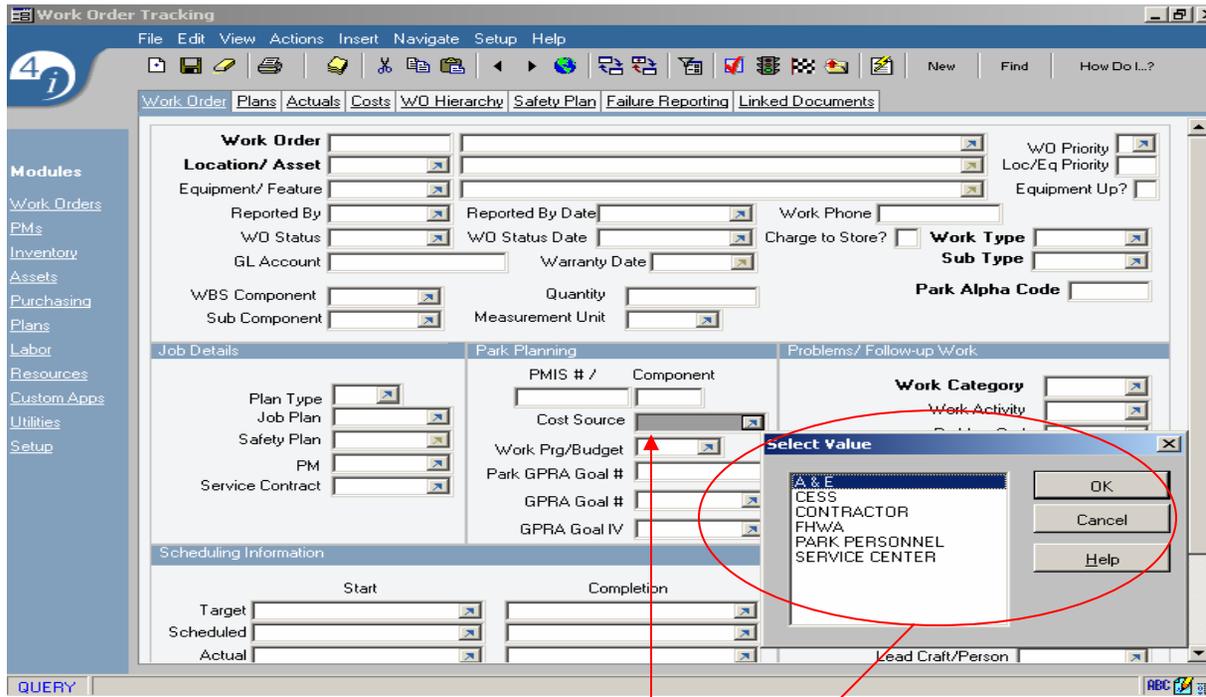
The top screenshot shows the 'Work Order' form with the following details:

- Work Order: 101353
- Belongs To: 101352
- Status: COSTED
- Children table:

Seq	Work Order	Description	Equipment/ Feature	Location/ Asset	Status	Belongs To

The bottom screenshot shows the detailed 'Work Order' form for '101353' with the following details:

- Work Order: 101353
- Location/ Asset: 4093
- W/O Status: COSTED
- W/O Status Date: 8/30/2002 4:42
- W/O Priority: 9
- Loc/Eq Priority: [blank]
- Equipment Up?: [checkbox]
- Work Type: FM
- Sub Type: DM
- Park Alpha Code: REDW
- Quantity: 2
- Measurement Unit: EA
- WBS Component: A10
- Sub Component: A1010
- Warranty Date: [blank]
- Charge to Store?: [checkbox]
- Job Details: Plan Type, Job Plan, Safety Plan, PM: 1170, Service Contract
- Park Planning: PMIS # / Component: 53731 / A, Cost Source: CESS, Work Prg/Budget, Park GPRA Goal #, GPRA Goal #, GPRA Goal IV
- Problems/ Follow-up Work: Work Category: 4000, Work Activity, Problem Code, Originating W/O: 38891, Has Follow-up Work?: [checkbox]



All child work order(s) must have a Cost Estimating Software System (CESS) estimate or an equivalent estimate from a documented source. This information should be documented in the *Cost Source* field located beneath the PMIS # field.

Step Three: Edit FMSS Work Order Field in PMIS

K. Edit the FMSS work order data field on the project component to a single parent component work order number. Click “Update FMSS Reference” icon on the Component Menu.



L. Edit the *FMSS Work Order Number* field in PMIS Project Component so it contains a single FMSS parent component work order number. Save your action

PMIS 5.3 - Update Component Reference Information

FMSS Work Order Numbers

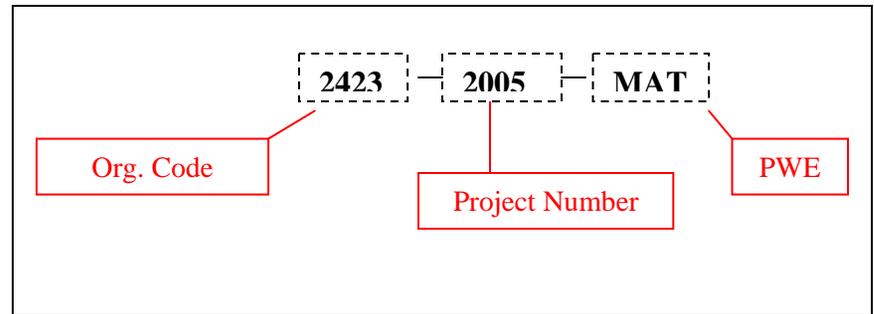
- If any FMSS Work Order Number in the comma-delimited list exceeds 10 characters in length, it will be automatically truncated to 10 characters.
- If duplicate FMSS Work Order Numbers are found in the comma-delimited list, only one instance of the duplicated entries will be saved.

Component ID	Alpha Code	Component Title	Component Reference Information
62143A	ACAD	Repair Hazardous Roadside Erosion	FMSS Work Order Numbers [Comma-delimited]: <input type="text"/> Reference Number [Multi-purpose]: <input type="text"/>

Save Changes | Cancel and Exit

Future Steps: Adjusting Work Orders When a Project is Funded and Executed

M. In FMSS, the parent component work order and all its' child work orders need to have General Ledger (GL) account filled out before the work orders are "approved". Work orders need to be approved in order to begin recording actuals against the work order. This GL account number will be taken from the associated PMIS project component funding information, which should be the same as in the Federal Financial System (FFS). Work orders funded by other fund sources, such as ONPS base, should have the GL account for that fund source. In FMSS, the GL account field must be filled **with hyphens and no spaces**.



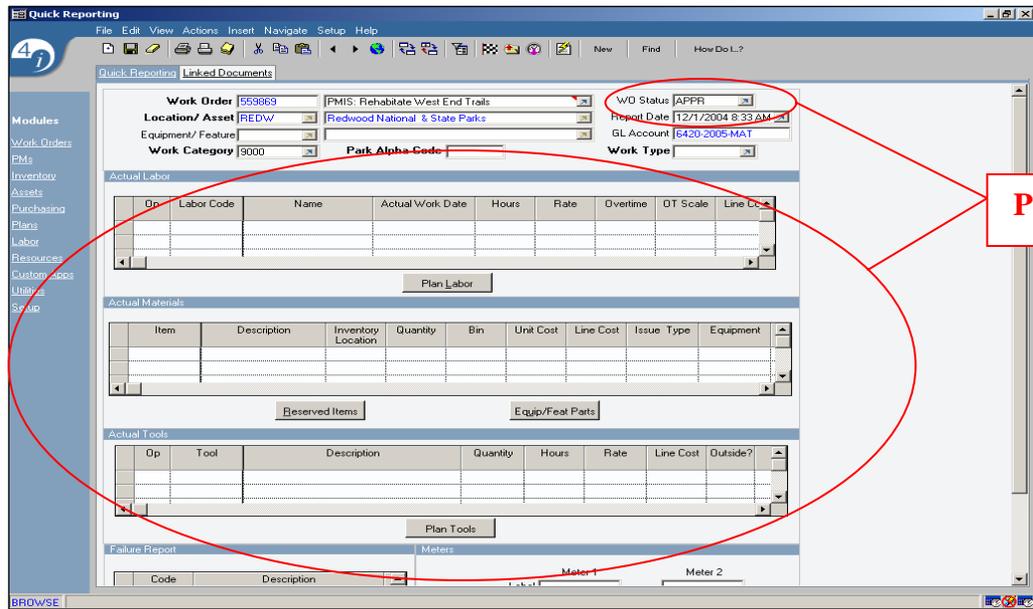
The first four characters should be the park organization code, the second four characters the project number, and the final three characters are the primary work element (PWE).

N. As work progresses on the project, enter the PMIS Status Report. When completed, enter the Status Report and Mark "Completed" with a date. This action allows access to the PMIS Completion Reports.



The FMSS work orders associated with funded project components will have to be managed through frequent reporting of data including actuals in order for the NPS to utilize the FMSS to correctly report accomplishments and performance.

- O. All parent component work orders and the child work orders must be approved in FMSS prior to work execution.
- P. As work progresses, actual costs must be reported against the FMSS child work order(s). The child work orders should be closed as the work is completed. All child work orders must be closed prior to closing the parent component work order.



- a. The Cost Estimate Approved amount for any child work orders classified as Deferred Maintenance (DM), Component Renewal Deferred Maintenance (CRDM), Recurring Maintenance Deferred Maintenance (RMDM) and Immediate Personal Hazard (IPH) subwork types will be automatically subtracted from the Facility Condition Index (FCI) numerator upon closure of the child work order. The majority of the parent work orders will be on a single asset. When a parent work order has multiple child work orders with multiple assets identified, the FCI will be reported by asset. Each asset identified in the child work orders will have the beginning FCI and a projected FCI that will be system generated and in a standard report. A PMIS project component that works on a single asset will have a single set of FCIs reported; multiple assets will have FCI data for each identified asset reported.

APPENDIX: Examples of Different Types of Children and Parent Work Orders in FMSS

Example One: Project with Single Asset and Single Work Order

Parent Work Order

Work Order: F04867			PMIS: Repair Employee Housing Roof			WD Priority: []		
Location/ Asset: REDW			Redwood National & State Parks			Loc/Eq Priority: []		
Equipment/ Feature: []			Equipment Up?: []					
Reported By: MAXIMO		Reported By Date: 9/2/2004 6:32 A		Work Phone: []				
WD Status: WAPPR		WD Status Date: 9/2/2004 6:32 A		Charge to Store?: [N]		Work Type: []		
GL Account: []		Warranty Date: []		Park Alpha Code: REDW		Sub Type: []		
WBS Component: []		Quantity: []						
Sub Component: []		Measurement Unit: []						
Job Details			Park Planning			Problems/ Follow-up Work		
Plan Type: []			PMIS # / Component: 89325 / A			Work Category: 9000		
Job Plan: []			Work Prg/Budget: []			Work Activity: []		
Safety Plan: []			Park GPRA Goal #: []			Problem Code: []		
PM: []			GPRA Goal #: []			Originating WD: []		
Service Contract: []			GPRA Goal IV: []			Has Follow-up Work?: [N]		
Scheduling Information			Responsibility / Modify					

Reminders for Parent Component Work Orders:

- Parent work order title = PMIS: project component title
- Parent work order has the PMIS component number
- Parent work order has the park alpha as the location/asset
- Parent work orders have no WBS or work types

Child Work Order

Work Order: F01353			FY02 HHDS Lodge Repair Foundation			WD Priority: 9		
Location/ Asset: 4093			Howland Hill Outdoor School Lodge, 2901			Loc/Eq Priority: []		
Equipment/ Feature: []			Equipment Up?: []					
Reported By: []		Reported By Date: 8/5/2002 4:43 P		Work Phone: []				
WD Status: COSTED		WD Status Date: 8/30/2002 4:42		Charge to Store?: [N]		Work Type: FM		
GL Account: 6420-2005-MAT		Warranty Date: []		Park Alpha Code: REDW		Sub Type: DM		
WBS Component: A10		Quantity: 2						
Sub Component: A1010		Measurement Unit: EA						
Job Details			Park Planning			Problems/ Follow-up Work		
Plan Type: []			PMIS # / Component: 53731 / A			Work Category: 4000		
Job Plan: []			Cost Source: CESS			Work Activity: []		
Safety Plan: []			Work Prg/Budget: []			Problem Code: []		
PM: 1170			Park GPRA Goal #: []			Originating WD: 38891		
Service Contract: []			GPRA Goal #: []			Has Follow-up Work?: [N]		
			GPRA Goal IV: []					

Reminders for Child Work Orders:

- Child WO has FMSS Asset Location Number
- Child WO has work/subwork types
- Child WO has WBS Component and Subcomponent (when available)
- Child WO belongs to Parent WO
- Child WO status is "Costed"

WO1: Repair Foundation

Example Two: Project with Single Asset and Multiple Work Orders

PMIS Project Component = Parent FMSS Work Order: Mountain Top Ranger Office

Parent Work Order

- Reminders for Parent Component Work Orders:**
- Parent work order title = PMIS: project component title
 - Parent work order has the PMIS component number
 - Parent work order has the park alpha as the location/asset
 - Parent work orders have no WBS or work types

Child Work Orders

WO1: Repair Foundation

WO2: Repair Site and Perimeter

- Reminders for Child Work Orders:**
- Child WO has FMSS Asset Location Number
 - Child WO has work/subwork types
 - Child WO has WBS Component and Subcomponent (when available)
 - Child WO belongs to Parent WO
 - Child WO status is "Costed"

Example Three: Project with Multiple Assets and Multiple Work Orders

Parent Work Order: Culvert and Trail Repair

The screenshot shows a software interface for a Parent Work Order. The main title is 'Work Order: 504989 PMIS: Culvert and Trail Repair'. The location/asset is 'REDW Redwood National & State Parks'. The work status is 'WAPPR' and the status date is '9/2/2004 6:33 A'. The work type is blank, and the sub-type is blank. The park alpha code is 'REDW'. The form includes sections for Job Details, Park Planning, and Problems/Follow-up Work.

Reminders for Parent Component Work Orders:

- Parent work order title = PMIS: project component title
- Parent work order has the PMIS component number
- Parent work order has the park alpha as the location/asset
- Parent work orders have no WBS or work types

Child Work Orders

The screenshot shows a software interface for a Child Work Order. The main title is 'Work Order: 119143 FY02 Mill Creek Horse Trail Road REPAIR CULVERT'. The location/asset is '13170 Mill Creek Horse Trail Road'. The work status is 'COSTED' and the status date is '9/5/2002 8:15 P'. The work type is 'FM' and the sub-type is 'DM'. The WBS component is 'G2010' and the sub-component is 'G303004'. The quantity is '5' and the measurement unit is 'EA'. The park alpha code is 'REDW'.

WO1: Repair Culvert on Asset

The screenshot shows a software interface for a Child Work Order. The main title is 'Work Order: 113780 Repair Trail Drainage Structures at Streeflow'. The location/asset is '11724 Streeflow Creek Trail'. The work status is 'COSTED' and the status date is '8/28/2002 4:03'. The work type is 'FM' and the sub-type is 'DM'. The WBS component is 'G2030' and the sub-component is 'G203002'. The quantity is '8' and the measurement unit is 'EA'. The park alpha code is 'REDW'.

WO2: Repair Trail Drainage

Reminders for Child Work Orders:

- Child WO has FMSS Asset Location Number
- Child WO has work/subwork types
- Child WO has WBS Component and Subcomponent (when available)
- Child WO belongs to Parent WO
- Child WO status is "Costed"

