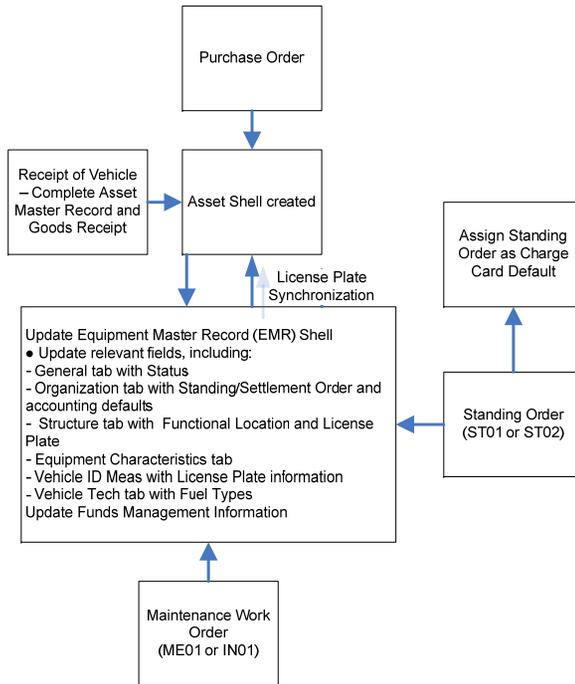


This Quick Reference Card addresses the setup for Equipment records and their associated orders used to facilitate financial postings.

Please refer to the Additional Support section on this QRG for a complete listing of work instructions, manuals, and SOPs to support the full process for changing an Equipment Record. 

High-level Overview of Equipment Setup



Additional Support

Refer to the following Work Instructions for more detail regarding the individual tasks:

- Change Vehicles
- Create Order
- Fleet Utilization

Refer to the following Standard Operating Procedure or Manual on the portal:

- Managing Work Orders
- FBMS Charge Card Manual V1.1

FBMS Help Desk:

FBMS_helpdesk@nbc.gov

866-457-3267

During Normal Business Hours:

Contact the FBMS Helpdesk for production issues and use the “Contact Us” link in the PMO portal for non-production issues

Emergency Support During Non-Business hours:

866-457-3267

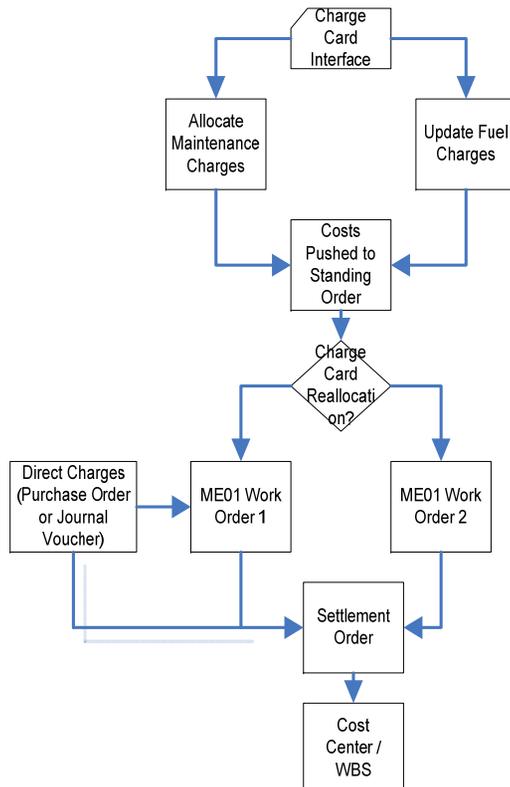
FBMS WORK ORDER QUICK REFERENCE GUIDE



Understanding Order Types

ME01	A maintenance work order used to manually create work orders for corrective maintenance and used by FBMS to automatically generate preventive maintenance work orders from a maintenance plan.
ST01	A standing work order used to collect on-going maintenance costs and periodically settle to a WBS Element .
ST02	A standing work order used to collect on-going maintenance costs and periodically settle to a cost center .
IN01	An inspection work order.

Work Order Settlement Process



Equipment Setup Process

Portal path **PROPERTY → FLEET → Fleet (Vehicles/Equipment) → Change Equipment**

1. On Change Equipment, type your equipment number and press the Enter key on your keyboard.
2. Select the Organization tab, complete the following:
 - Business Area
 - Cost Center
 - WBS Element
 - Standing Order – see below
 - Settlement Order – see below

Standing Order Setup (ST01/ST02)

Portal path **PROPERTY → FLEET → Maintenance → Work Order → Create Order**

1. On Create Order: Initial Screen, type the Order Type and Equipment number and press the Enter key on your keyboard.

Note: FBMS pulls in default values from the Equipment record if the record is already updated.

2. On the Header Data tab, verify the PMAcType is ST and the Equipment number is populated.
3. DO NOT add any values to the Additional Data tab.
4. Select the Menu button → Goto → Assignments → Funds Management and complete the following:
 - Fund (may be derived depending on your bureau)
 - Functional Area
5. Click Save



Once you Release your Maintenance Work Order, the Settlement Order uses the data on the work order's Location tab to populate the settlement rule. View your settlement rule by accessing Menu → GoTo → Settlement rule from the Maintenance Order screen.

Work Order Setup (ME01/IN01)

Portal path **PROPERTY → FLEET → Maintenance → Work Order → Create Order**

 Because the Work Order pulls information from the Equipment Master Record (EMR), make sure the Organization data tab on the EMR is updated before creating a work order.

1. On Create Order: Initial Screen, type the Order Type and Equipment number and press the Enter key on your keyboard.

Note: FBMS pulls in default values from the Equipment record if the record is already updated.

2. On the Header Data tab, verify the PMAcType is PM and the Equipment number is populated.
3. DO NOT add any values to the Additional Data tab.
4. The Account Assignment fields on the Location tab are pulled from the equipment record during the initial creation of the maintenance order.
5. Select the Menu button → Goto → Assignments → Funds Management and complete the following:
 - Fund (may be derived depending on your bureau)
 - Functional Area
6. Select the Release button to release the maintenance order.
7. Click Save.



If, for any reason, your Account Assignment values change on the EMR, you need to manually update the Account Assignment values on the Location tab on all open Work Order's for the Equipment record.