



CMMS

COMPUTERIZED MAINTENANCE
MANAGEMENT SYSTEM

**CMMS Differences Between
Old Version (10.1.2) and
New Version (11) for:
DPW Staff**

Benefits

The new version of CMMS:

- Is faster and more convenient .
- Uses a modern platform allows for a new convenient interface that provides a friendlier experience for the user.
- Now has more built in tools to help users get the job done more efficiently and track performance.

Benefits

Although there are changes that came with the upgrade, rest assured that business processes have NOT changed and at its core CMMS has remained the same.



CMMS

COMPUTERIZED MAINTENANCE
MANAGEMENT SYSTEM

General Changes

Browser Agnostic

CMMS is browser agnostic, meaning users may use any internet browser such as:



Chrome (Version 30.X)



Internet Explorer (Version 9 & 10)



Safari (Version 6.0.5)



Firefox

Password

Please view the PowerPoint “How to Change Your Password” for more information.



CMMS

COMPUTERIZED MAINTENANCE
MANAGEMENT SYSTEM

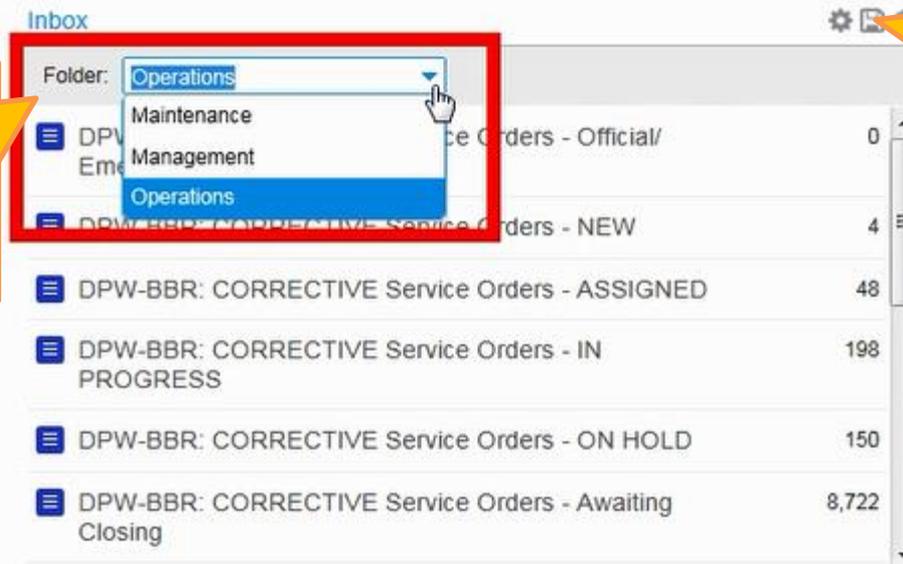
Start

Center

Inbox

Inbox folders are no longer split into tabs. Choose **maintenance, management or operations** using the drop down bar instead. You can also select what folder you want to see by default by clicking the **save icon**.

Inbox Drop
Down



Save as
Default

New Chart Section

In the start center, there is a new tool that will help you track the amount of Service Orders over periods of time.



New Chart Section

In the start center, there is a new tool that will help you track the amount of Service Orders over periods of time.

View by Month or Quarters

View single or multiple years.

Chart Controls

Chart Type: DPW-BSSR Sen

Chart Period: Months

Status: All

Show Year/Year:

View different charts

View Open, Closed, On Hold, or ALL SOs

New Chart Section

DPW-BSSR Service Orders by Status Group

2014

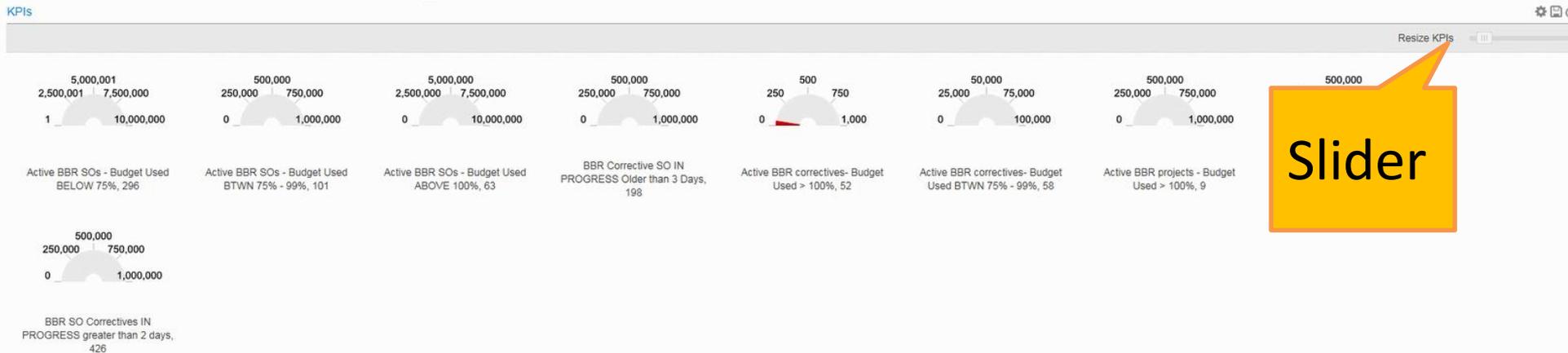


Click to view specific month

Hover over circle to view exact amount of open, closed, on hold SOs

KPIs

The KPI section now displays dynamic real time KPIs. It will be constantly changing based on real time approvals. You can also change the sizes of your KPIs using this slider on the left.



Note: not everyone will have KPIs displayed

Menu Drop Downs

Note that the **Menu drop downs (Work, Assets & Documentation)** have moved from the upper right hand side to the upper left hand side of the screen.

The screenshot displays the CMMS interface with the following elements:

- Top Left:** A red-bordered box highlights the new location of the menu drop-downs: **WORK**, **ASSETS**, and **Documentation**.
- Top Right:** A red-bordered box highlights the old location of the menu drop-downs.
- Center:** A large blue arrow points from the old location to the new location.
- Main Content:** A service order form for "DPW Service Orders" with details such as "Service Order: 453201" and "Asset: 12320-9".
- Bottom Right:** A green-bordered box contains the text "Previous Version of CMMS".



CMMS

COMPUTERIZED MAINTENANCE
MANAGEMENT SYSTEM

Screen

Changes

Split View

Split view is now the default view when using CMMS. No longer will you have to switch back and forth between List View and Record View.

The screenshot displays the CMMS interface in a split view. On the left, a list of service orders is shown, with the selected order highlighted. On the right, the detailed record view for that order is displayed, including fields for status, asset, location, and scheduling. A yellow callout box on the left points to the list view, and another on the right points to the record view.

Service Orders on Left

Record View on the Right

Split View

Search for Service Orders here

The screenshot displays the CMMS interface with a search bar at the top left containing the text "acce". A red box highlights this search bar. Below the search bar is a list of service orders. The main area of the interface is split into two panes. The left pane shows a list of service orders, and the right pane shows the details for the selected service order (455721).

Search Bar: acce

Service Order List:

- 455721 - Test - Anza - BBR
Status: Accepted
Asset: 12217-RRM
- 455568 - CN TEST: Submitted by another reques...
Status: Accepted
Asset: 12217-EXTRBLDG
- 455560 - Test - TN - Bayview
Status: Accepted
Asset: 12212-PRG
- 455555 - CNTEST - Estimate test

Service Order Details (455721):

- Service Order Template: [Empty]
- Service Order: 455721 (Selected)
- Asset: 12217-RRM (Selected)
- Asset Owner: [Empty]
- Asset Common Name: Anza Branch Library
- On Street: 37TH AVE
- District: 01
- SO Maintenance Department: DPW-BBR
- Service Order Class: FACAREA
- From Street: GEARY BL
- Source System: [Empty]
- Source Department SO: [Empty]

Expand Right

Expand Right to see List View

Click to expand

DPW Service Orders 455560 Test - TN - Bayview

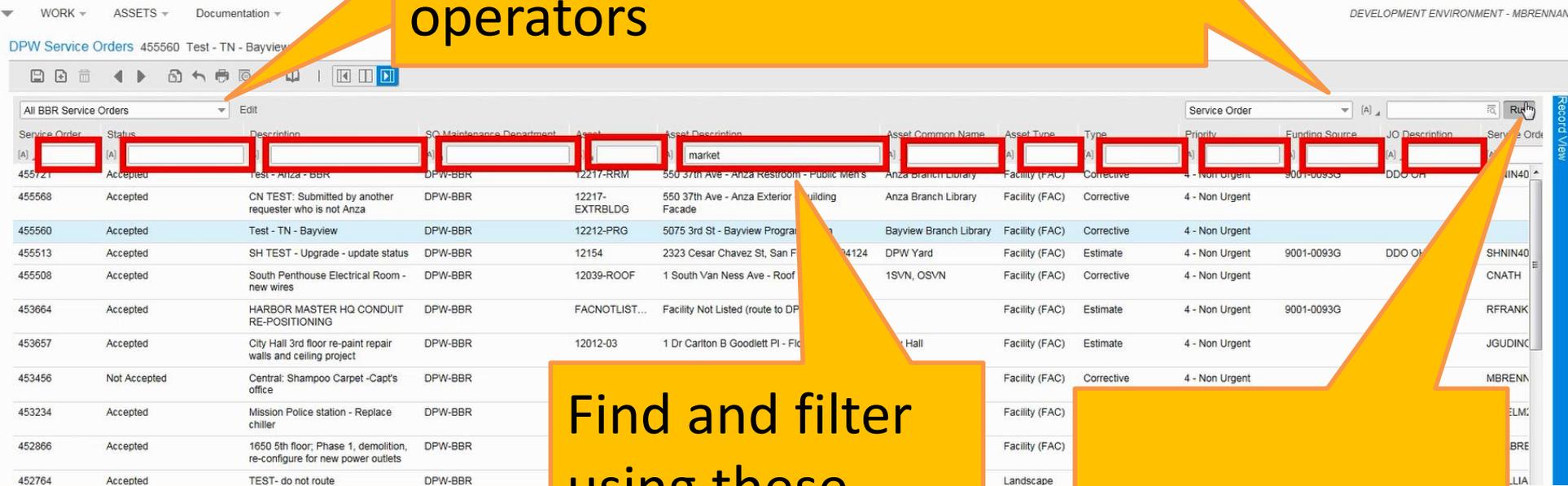
All BBR Service Orders Edit

Service Order	Status	Description	SO Maintenance Department	Asset	Asset Description	Asset Common Name	Asset Type
455721	Accepted	Test - Anza - BBR	DPW-BBR	12217-RRM	550 37th Ave - Anza Restroom - Public Men's	Anza Branch Library	Facility (FAC)
455568	Accepted	CN TEST: Submitted by another requester who is not Anza	DPW-BBR	12217-EXTRBLDG	550 37th Ave - Anza Exterior - Building Facade	Anza Branch Library	Facility (FAC)
455560	Accepted	Test - TN - Bayview	DPW-BBR	12212-PRG	5075 3rd St - Bayview Program Room	Bayview Branch Library	Facility (FAC)
455513	Accepted	SH TEST - Upgrade - update status	DPW-BBR	12154	2323 Cesar Chavez St, San Francisco, 94124	DPW Yard	Facility (FAC)
455508	Accepted	South Penthouse Electrical Room - new wires	DPW-BBR	12039-ROOF	1 South Van Ness Ave - Roof	1SVN, OSVN	Facility (FAC)
453664	Accepted	HARBOR MASTER HQ CONDUIT RE-POSITIONING	DPW-BBR	FACNOTLIST...	Facility Not Listed (route to DPW-BBR)		Facility (FAC)
453657	Accepted	City Hall 3rd floor re-paint repair walls and ceiling project	DPW-BBR	12012-03	1 Dr Carlton B Goodlett Pl - Floor 3	City Hall	Facility (FAC)
453456	Not Accepted	Central: Shampoo Carpet -Capt's office	DPW-BBR	12045-01	766 Vallejo St - Floor 1	Central Station	Facility (FAC)
453234	Accepted	Mission Police station - Replace chiller	DPW-BBR	12044-HVAC	630 Valencia St - HVAC	Mission Station	Facility (FAC)
452866	Accepted	1650 5th floor; Phase 1, demolition, re-configure for new power outlets	DPW-BBR	FACNOTLIST...	Facility Not Listed (route to DPW-BBR)		Facility (FAC)
452764	Accepted	TEST- do not route	DPW-BBR	LSP-1019	Athens St; Valmar Ter - Avalon Ave Landscape Plot		Landscape PLOT (LAND)
452721	Accepted	test (AST)	DPW-BBR	FACNOTLIST...	Facility Not Listed (route to DPW-BBR)		Facility (FAC)
452461	Accepted	SESP New Concrete fill in pad near digester.	DPW-BBR	12035-CM	750 Phelps St - Common Area	SE Water Pollution Control Plant, 1800 J	Facility (FAC)
451628	Accepted	1011 Turk GE Breaker Project.	DPW-BBR	12042	1011 Turk St, San Francisco, 94102	DEM	Facility (FAC)
450864	Accepted	2439J: 19th Ave/Lincoln Way/Crossover Dr - Plumbing change order	DPW-BBR	RWY-27374000	19TH AVE / CROSSOVER DR \ LINCOLN WAY Roadway		Roadway (CNN)
450504	Not Accepted	SFPL Sunset Branch Low Construction Air Project	DPW-BBR	12093	1305 18th Ave, San Francisco, 94122	Sunset Branch Library	Facility (FAC)

Expand Right

To search:

Use these Dropdowns which allows for different search operators



The screenshot displays a software interface for searching service orders. At the top, there are navigation tabs: WORK, ASSETS, and Documentation. Below these, a breadcrumb trail reads 'DPW Service Orders 455560 Test - TN - Bayview'. A toolbar contains various icons for file operations. The main area features a search filter table with columns: Service Order, Status, Description, SO Maintenance Department, Asset ID, Asset Description, Asset Common Name, Asset Type, Type, Priority, Funding Source, JO Description, and Service Order. The 'Asset Description' field contains the text 'market'. A 'Run' button is located at the top right of the filter table. A 'Report View' button is visible on the far right edge.

Service Order	Status	Description	SO Maintenance Department	Asset ID	Asset Description	Asset Common Name	Asset Type	Type	Priority	Funding Source	JO Description	Service Order
(A) 455721	Accepted	Test - Anza - BBR	DPW-BBR	12217-RRM	550 37th Ave - Anza Restroom - Public Mens	Anza Branch Library	Facility (FAC)	Corrective	4 - Non Urgent	9001-0093G	DDO CH	SHIN40
455568	Accepted	CN TEST: Submitted by another requester who is not Anza	DPW-BBR	12217-EXTRBLDG	550 37th Ave - Anza Exterior Building Facade	Anza Branch Library	Facility (FAC)	Corrective	4 - Non Urgent			
455560	Accepted	Test - TN - Bayview	DPW-BBR	12212-PRG	5075 3rd St - Bayview Program	Bayview Branch Library	Facility (FAC)	Corrective	4 - Non Urgent			
455513	Accepted	SH TEST - Upgrade - update status	DPW-BBR	12154	2323 Cesar Chavez St, San F	4124 DPW Yard	Facility (FAC)	Estimate	4 - Non Urgent	9001-0093G	DDO CH	SHIN40
455508	Accepted	South Penthouse Electrical Room - new wires	DPW-BBR	12039-ROOF	1 South Van Ness Ave - Roof	1SVN, OSVN	Facility (FAC)	Corrective	4 - Non Urgent			SHIN40
453664	Accepted	HARBOR MASTER HQ CONDUIT RE-POSITIONING	DPW-BBR	FACNOTLIST...	Facility Not Listed (route to DP		Facility (FAC)	Estimate	4 - Non Urgent	9001-0093G		RFRANK
453657	Accepted	City Hall 3rd floor re-paint repair walls and ceiling project	DPW-BBR	12012-03	1 Dr Carlton B Goodlett Pl - F		Facility (FAC)	Estimate	4 - Non Urgent			JGUDINC
453456	Not Accepted	Central: Shampoo Carpet -Capt's office	DPW-BBR				Facility (FAC)	Corrective	4 - Non Urgent			MBRENN
453234	Accepted	Mission Police station - Replace chiller	DPW-BBR				Facility (FAC)					ELMC
452866	Accepted	1650 5th floor; Phase 1, demolition, re-configure for new power outlets	DPW-BBR				Facility (FAC)					MBRENN
452764	Accepted	TEST- do not route	DPW-BBR				Landscape					LLIA

Find and filter using these boxes

Then, click Run

Expand Left

Expand Left to view Record Only

DPW Service Orders 453201 RED Remove existing carpet tile for storage/attic stock



Record View Comments Documents Activities Non-Labor Schedule Tools Permits Scope Multi-Assets

Service Order Template: DPW-BBR-SOFT-EST1

Service Order: 453201 RED Remove existing carpet tile for storage/attic stock

Asset: 12320-9 1155 Market Street - Floor 9

Asset Owner:

Asset Common Name:

On Street:

District:

SO Maintenance: DPW-BBR

Department: DPW-BBR

Type: Estimate

FISO:

Roadway ID:

Service Order Class: FACFLOOR

From Street:

Source System:

Source Department SO:

HUB SO:

SERVICE ORDER DETAILS

Safety:

Priority: 4 - Non Urgent

Problem Code: FLOOR

Block:

Call Back Request?:

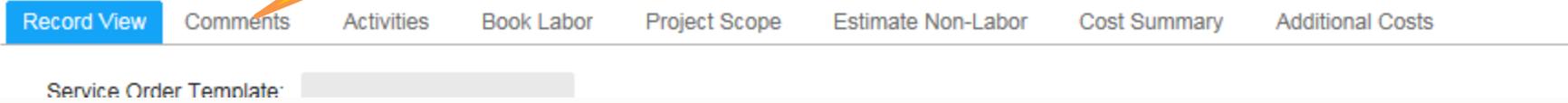
Duplicate SO:

Parent SO:

Related SO:

Comments

Click on
Comments Tab



Click on New
Comment Button to
open pop up window

Comments

Add/Edit Comments ✕

Language: * English ▾ Print with Document:

Tahoma ▾ A⁺ A⁻ | **B** *I* U | A ▾ A ▾ |   |  | 

Type comments here

Save

Save Cancel

Uploaded Documents

Whenever a document is uploaded in the Documents tab, an icon is created on the lower portion of the record view page. Simply click on the icon to view the uploaded attachments..

The screenshot displays the CMMS interface. On the left, a list of service orders is shown, including '451153 - d' (Submitted, Asset: FACNOTLISTED4) and '451060 - CN TEST: Create Client SR to DPW' (CLIENT Approved, Asset: 12061-EXTRBLDG). The right pane shows the 'Record View' for '451153 - d'. It includes tabs for 'Record View', 'Comments', 'Documents', 'Activities', 'Non-Labor', 'Schedule Tools', 'Permits', 'Book Labor', 'Additional Costs', 'Multi-Assets', and 'Children'. The 'Documents' tab is active, showing a document icon with a hand cursor. Below the icon is the text 'D17834-blue-jelly-icon-symb.'. The record view also contains sections for 'FUNDING' and 'SERVICE ORDER COST'.

Click to view attachment

Icon Changes

Lookup Tool



A screenshot of a software interface showing a text input field containing the text "DPW-BUF". To the right of the input field is a search icon (magnifying glass) inside a blue-bordered box.

Drop Down



A screenshot of a software interface showing a drop-down menu. The menu is currently open, displaying a list of options: Corrective, Estimate, Estimate Inspection, Event, Internal, Project, and Standing. The 'Corrective' option is highlighted in blue.

Last Form

Whenever you switch to another form, the last form you were viewing will be displayed on the bottom of the screen. Navigating between screens have become simpler as a result.

Switch between the previous and current screens.

The screenshot displays the CMMS web application interface. The browser address bar shows the URL `http://cmms/web/base/loginDisp`. The application header includes the EAM logo and navigation menus for WORK, ASSETS, and Documentation. The main content area shows a record view for an address with the following details:

- Record View:** ADD - 10 KIRKHAM ST | Address
- CMMS ID:** ADD
- Asset Common Name:** 10 KIRKHAM ST | Address
- Maintenance Department:** DPW-BSES
- Jurisdiction Dept:** DPW-BSES
- Type:** Address (ADDS)
- LOCATION DETAILS:**
 - Roadway ID: 07842000
 - Roadway Description: KORET WAY-05TH AVE (
 - On Street: KIRKHAM ST
 - From Street: KORET WAY
- ADDITIONAL INFORMATION:**
 - Asset Owner:
 - Block Number:
 - Muni Route Type:
 - Odd Side Street:
 - Sweeping:
 - Zip Code:
 - Supervisory District: 7
 - Lot Number:
 - Bicycle Path:
 - Even Side Street:
 - Sweeping:
 - X Coordinate: 5,994,781.523681
 - Y Coordinate: 2,105,712.197506
- EXTERNAL SYSTEM ID:**
 - Owner ID:
 - CALTRANS ID:
- STATUS:** Active
- Requester's Department:**

A yellow callout box points to a red-bordered button labeled "Address DPW Service Orders" at the bottom of the page.



CMMS

COMPUTERIZED MAINTENANCE
MANAGEMENT SYSTEM

Enhancements

Descriptive Error Messages

When you receive an error message from CMMS, no longer will it be a generic non descriptive message such as:



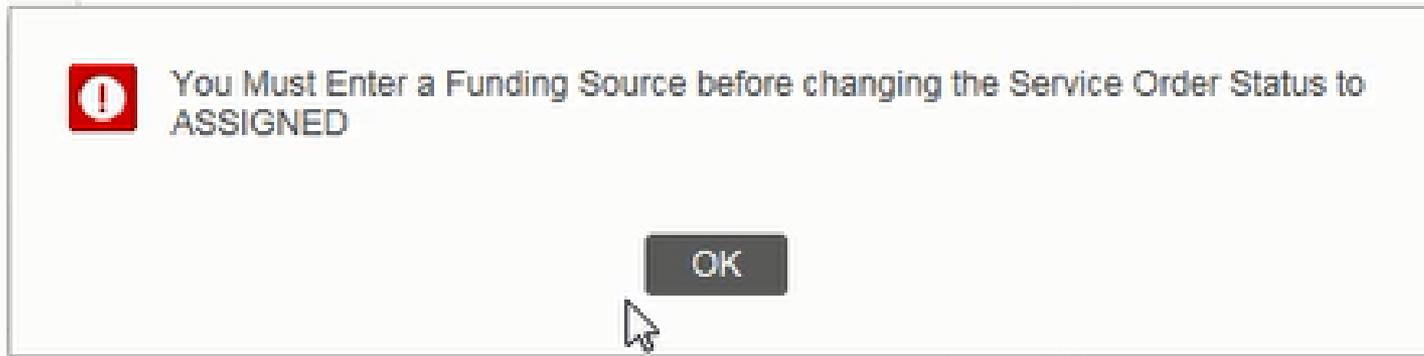
You will now receive a detailed message telling you exactly what is needed to move forward with the task.

Descriptive Error Messages

- Funding Source required at work assigned
- Valid Assigned By and SO Lead at work accepted
- *Trade Required at work Assigned
- Combination of SO Type and Status is invalid

Descriptive Error Messages

Funding Source required at work assigned



This error will appear when you try to change the status to **Work Assigned**, but you have failed to enter in a funding source.

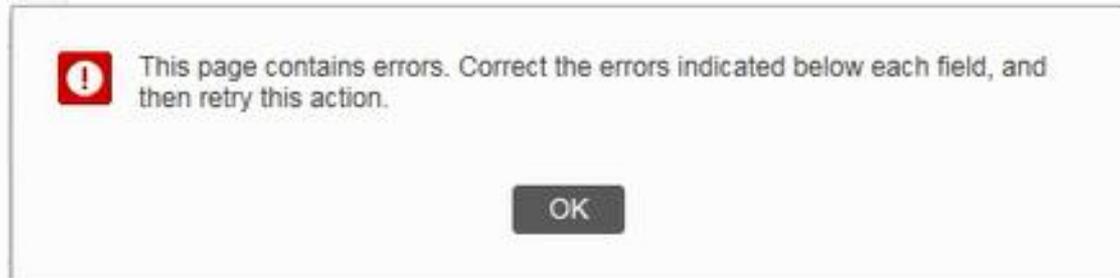
FUNDING

Funding Source:

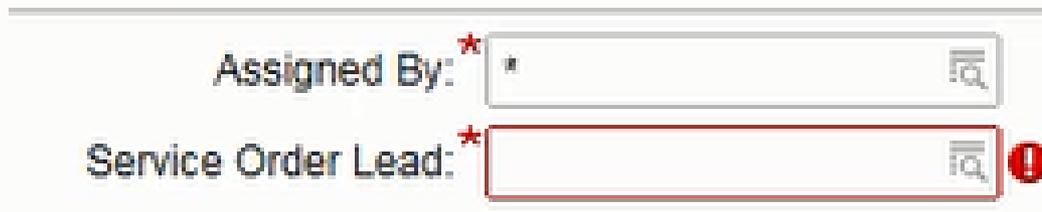
Funding Source (If NOT Available in List Above):

Descriptive Error Messages

Valid Assigned By and SO Lead at work accepted



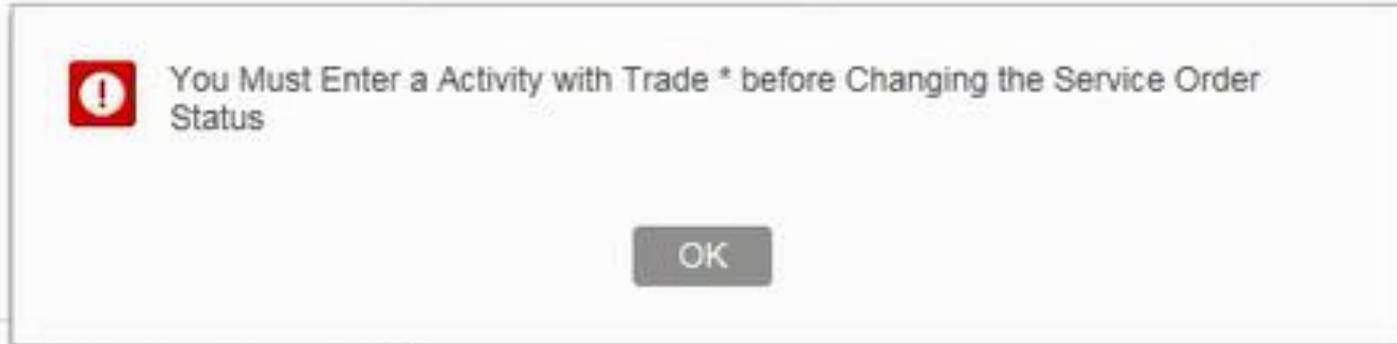
When you receive this message, it means you have left some necessary fields blank, most commonly the Assigned by and SO Lead fields.

A screenshot of a form with two input fields. The first field is labeled "Assigned By:" with a red asterisk to its right. The field contains a single asterisk. The second field is labeled "Service Order Lead:" with a red asterisk to its right. The field is empty. A red exclamation mark icon is positioned to the right of the second field.

Note the “!” directing you to the error

Descriptive Error Messages

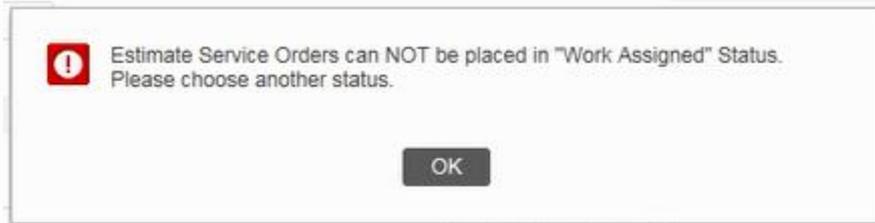
*Trade Required at work Assigned



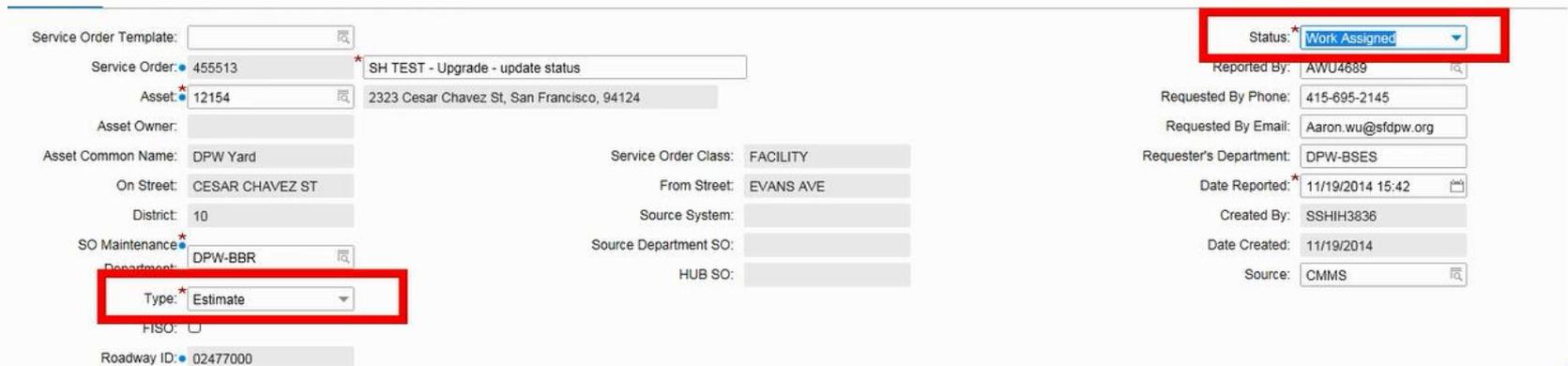
If you receive this message, it means that a **valid trade** is missing in the **activities tab**. Make the correction, and you can move on.

Descriptive Error Messages

Combination of SO Type and Status is invalid



For example, choosing Work Assigned for an estimate Service Order Will result in an error message. Please choose a proper status and save to move forward.



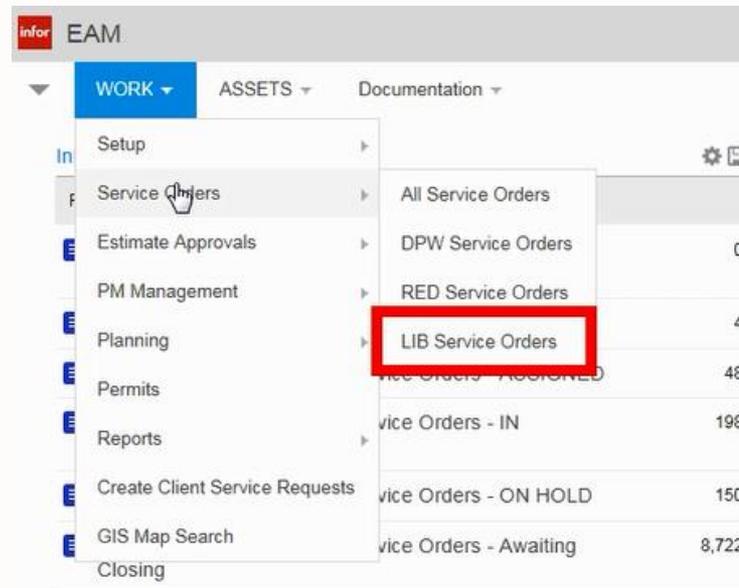
A screenshot of a Service Order form. The form contains various fields for service order details. Two fields are highlighted with red boxes: "Type" is set to "Estimate" and "Status" is set to "Work Assigned".

Service Order Template:		Status:	Work Assigned
Service Order:	455513	Reported By:	AWU4689
Asset:	12154	Requested By Phone:	415-695-2145
Asset Owner:		Requested By Email:	Aaron.wu@sfdpw.org
Asset Common Name:	DPW Yard	Requester's Department:	DPW-BSES
On Street:	CESAR CHAVEZ ST	Date Reported:	11/19/2014 15:42
District:	10	Created By:	SSH1H3836
SO Maintenance:	DPW-BBR	Date Created:	11/19/2014
Department:		Source:	CMMS
Type:	Estimate		
HISO:	<input type="checkbox"/>		
Roadway ID:	02477000		
Service Order Class:	FACILITY		
From Street:	EVANS AVE		
Source System:			
Source Department SO:			
HUB SO:			

LIB SOs

You will now be able to see Library SOs as well, since they have recently begun to merge their work n CMMS.

Take note that you will only have read-only access for these service orders.

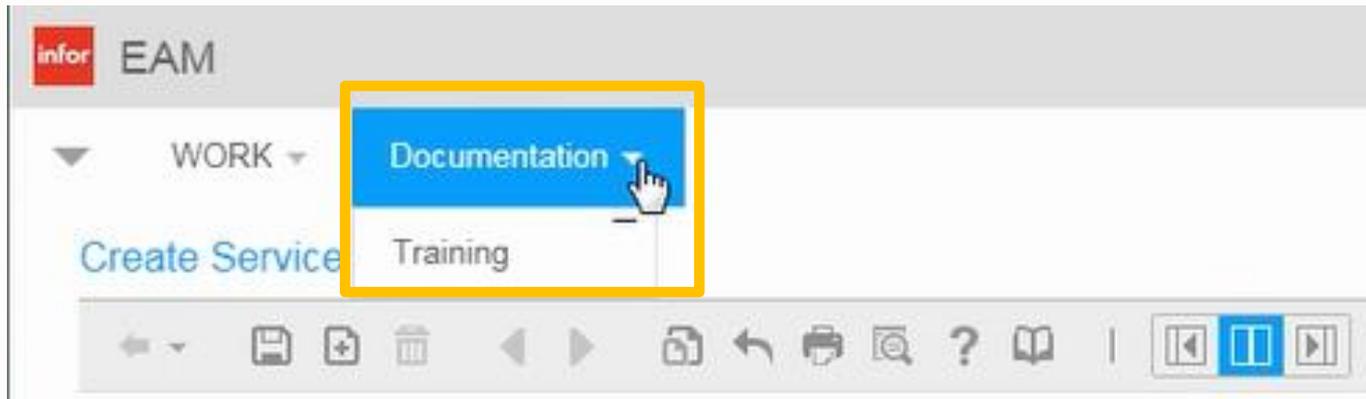


Datasp/ Filters

Due to the clean-up process that was necessary with the upgrade, please be aware of some of your datasp or filter settings may have changed. Please keep this in mind as you navigate the new version of CMMS.

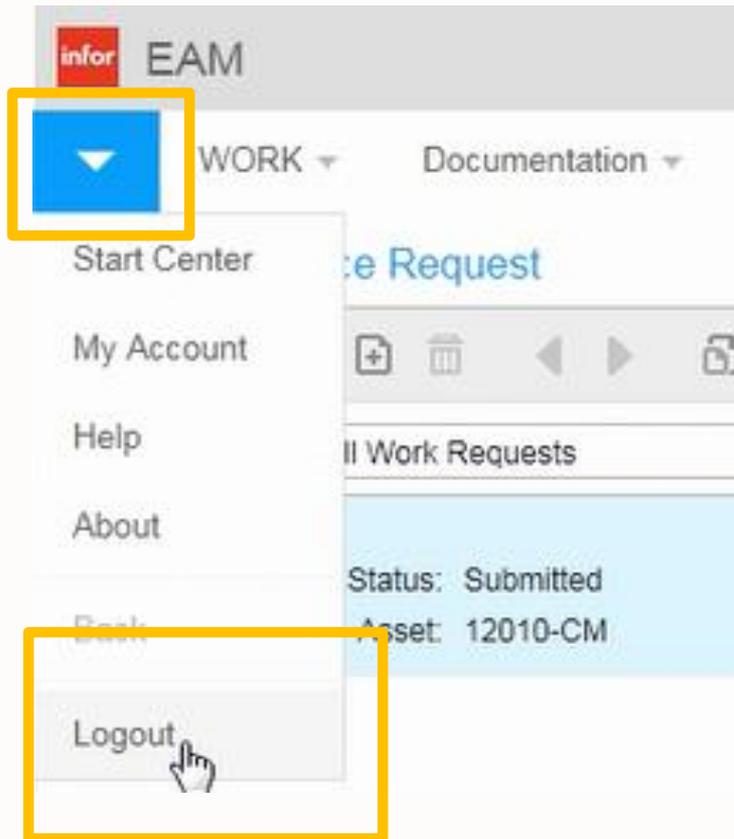
Additional Help

For additional help with CMMS, click on the Documentation tab and select Training.

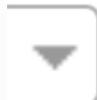


Logging out

To log out, click the Upside-down arrow in the corner and select Logout



Legend

	Save
	New
	Delete
	Required
	Lookup Tool
	Date Select
	Drop Down Menu

Contact

Help Desk:

helpdesk@sfdpw.org

(415) 558-4400