



CMMS

COMPUTERIZED MAINTENANCE
MANAGEMENT SYSTEM

How to Approve a Service Order Estimate

Accessing CMMS

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)



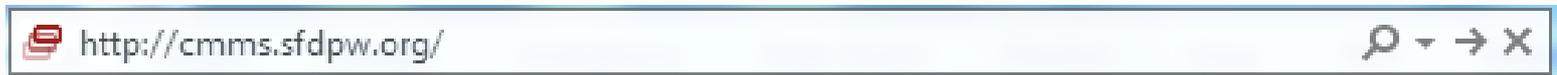
Firefox

Accessing CMMS

In your preferred Internet Browser's address bar, type in:

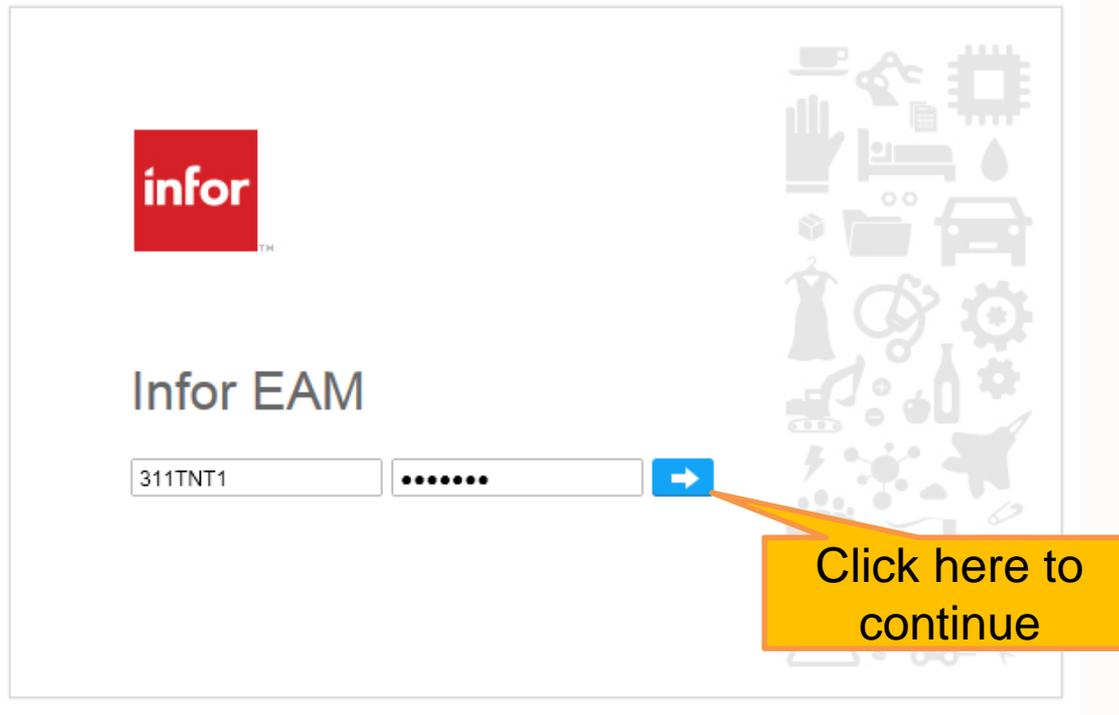
<http://cmms.sfdpw.org>

And press Enter



Logging In

Log in to CMMS by entering your USER ID as well as your PASSWORD.



The screenshot shows the Infor EAM login interface. At the top left is the Infor logo. Below it, the text 'Infor EAM' is displayed. There are two input fields: the first contains the user ID '311TNT1', and the second is a password field with masked characters. To the right of the password field is a blue arrow button. A yellow callout box with the text 'Click here to continue' points to this button. The background features a grid of various maintenance-related icons.

Basic Process



When you, **the client**, ask Public Works to create an estimate for a project, **the planner** will work with the **shop lead** to create an estimate based on current costs and rates.

Approvals

When the estimate is ready, it will be approved by...

The Shop Lead



The Planner



The Bureau Superintendent



The Deputy Director of Operations (DDO)



... and finally the Requestor (You)

Approval Choices

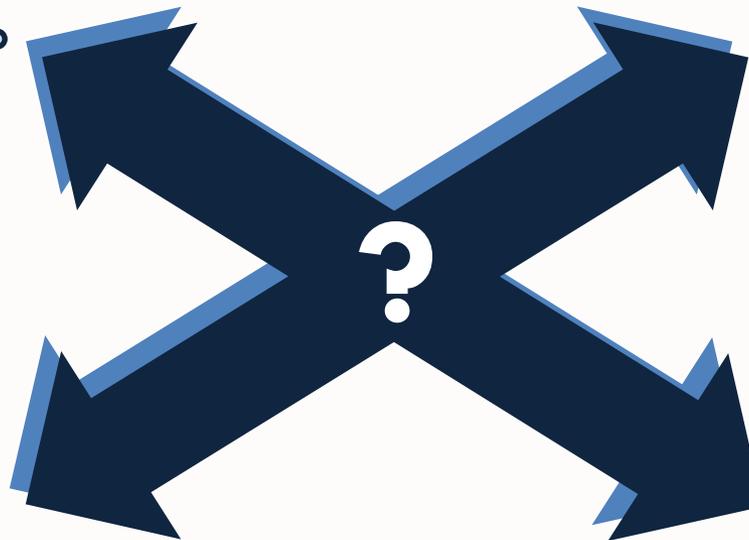
When it reaches your step for approval, you have the following four choices.

Approve

Don't Approve

Request Revision

Defer Until Another Time



Basic Steps

1

**Find the Service Order
in Question**

2

**View the Detailed
Estimate Report**

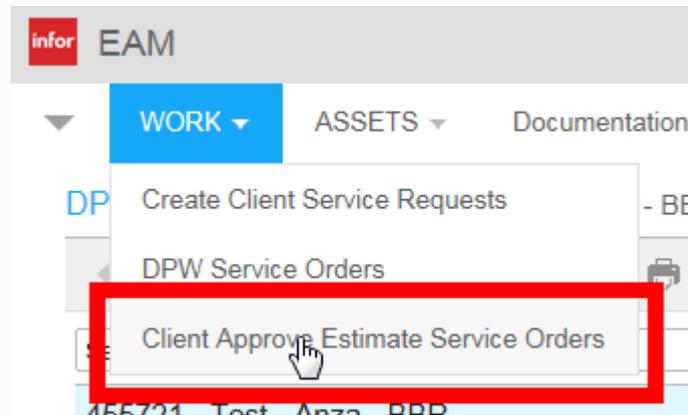
3

**Approve the Estimate,
or Don't Approve it**

Find the Service Order in Question

After you receive an email from CMMS indicating that an estimate needs to be approved, log into CMMS.

To get to the proper screen, click on WORK and select Client Approve Estimate Service Requests.



Find the Service Order in Question

In Split view, you will see the record on your right, and a list of Estimates waiting for approval on the left panel.

The screenshot shows the EAM (Enterprise Asset Management) interface. The top navigation bar includes 'WORK', 'ASSETS', and 'Documentation'. The main header displays 'Client Approve Estimate Service Orders 450140 SFUSD LED Wall Packs Install Sherman School'. Below this is a search bar and a set of tabs: 'Record View', 'Comments', 'Activities', 'Book Labor', 'Project Scope', 'Estimate Non-Labor', 'Cost Summary', and 'Additional Costs'. The 'Record View' tab is active, showing a detailed record for service order 450140. The left panel shows a list of estimates, with the top one selected. The right panel shows the record details, including fields for Service Order Template, Service Order, Asset, Asset Common Name, SO Maintenance, Department, Type, Status, Reported By, Requested By Phone, Requested By Email, Requester's Department, Date Reported, Created By, Date Created, Source, Assigned By, Service Order Lead, SO Lead's Phone No., Site Contact, Site Contact Phone, Req. Start Date, Vehicle, and Sort. The record details include: Service Order Template: DPW-BBR-EL-EST1; Service Order: 450140; Asset: FACNOTLISTED5; Asset Common Name: Facility Not Listed (route to DPW-BBR); SO Maintenance: DPW-BBR; Department: DPW-BBR; Type: Estimate; Status: Sent for CLIENT Approv; Reported By: RFRANKO327; Requested By Phone: 415-695-2056; Requested By Email: Robert.Franko@sfdpw.org; Requester's Department: DPW-BBR; Date Reported: 09/24/2014 14:43; Created By: MBRENNAN217; Date Created: 09/24/2014; Source: CMMS; Assigned By: MBRENNAN217; Service Order Lead: RFRANKO327; SO Lead's Phone No.: 415-695-2056; Site Contact: ; Site Contact Phone: ; Req. Start Date: ; Vehicle: ; Sort: .

List of Estimates

Record View

Find the Service Order in Question

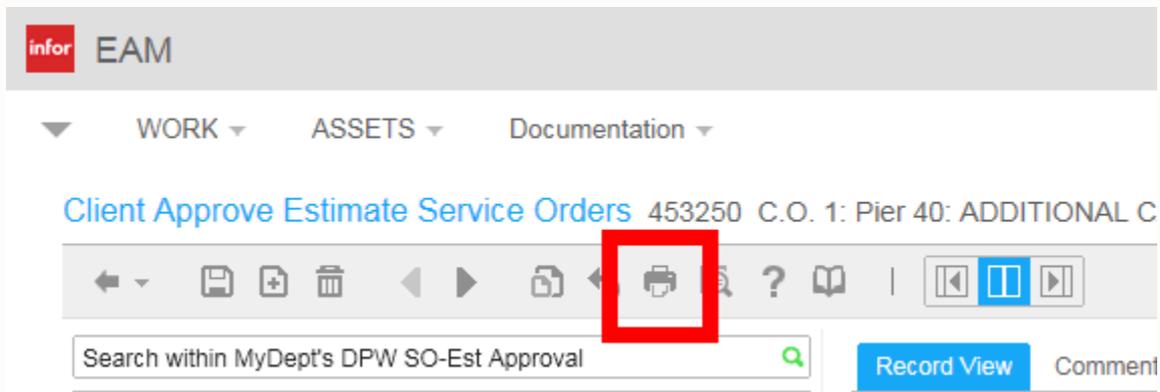
Find the one you want to work with and select it by clicking on it.

The screenshot displays the EAM (Enterprise Asset Management) interface. On the left, a list of service orders is shown, with the first one, '450140 - SFUSD LED Wall Packs Instal...', highlighted in blue. An orange callout box with the text 'Click and Select' points to this highlighted item. The main area shows the detailed view for service order 450140, including fields for Service Order Template, Service Order, Asset, Asset Common Name, SO Maintenance, Department, and Type. The status is 'Sent for CLIENT Approval'. The right side of the interface shows metadata such as Reported By, Requested By, and Date Reported. The bottom section shows 'SERVICE ORDER COSTS' with fields for NTE Amount, Change Order, % Budget Used, and Actual Labor Cost.

Click and
Select

View the Detailed Estimate Report

Click on the printer icon. This will open a new window with an embedded PDF.



This will open a new window with an embedded PDF.

View the Detailed Estimate Report

You may save a copy or print. You can zoom in and out.

Infor EAM Advanced Reports Viewer - SO_Overview_PrintScreen

Service Order Report (Overview)

Internal Report Name: SO_Overview_PrintScreen

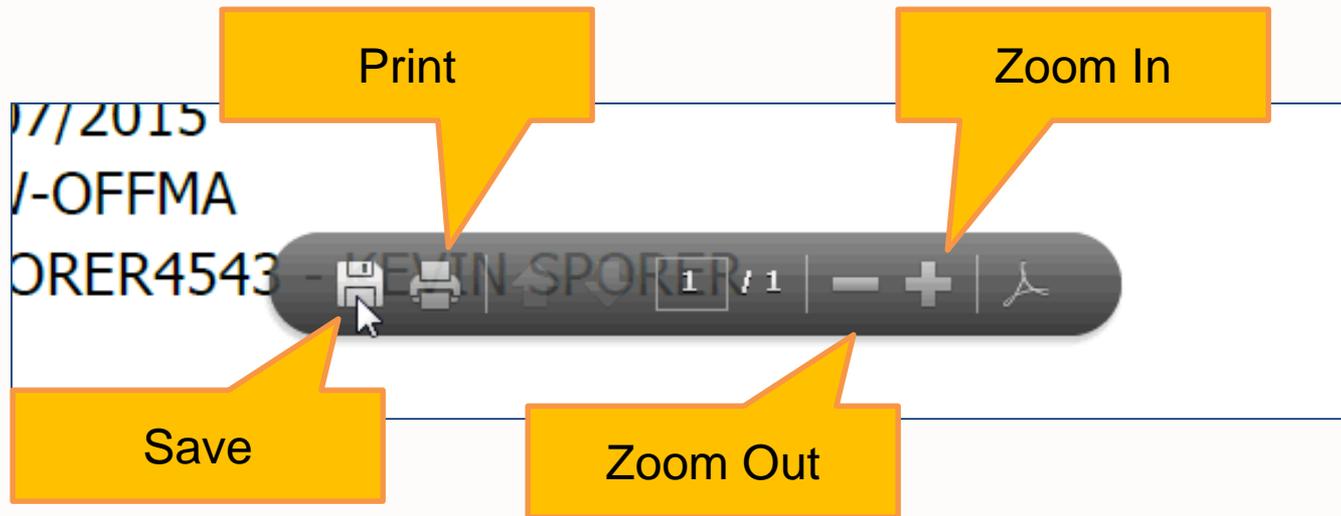
Run Date: Jan 15, 2015

DETAILS

Service Order	459525
Maintenance Department	DPW-BBR
Parent Service Order	
Description	LED Light Poles, LOWER YARD, 2323 Cesar Chavez
Status	Sent for CLIENT Approval
Asset ID	FACNOTLISTED5
Location	Facility Not Listed (route to DPW-BBR)
Asset Common Name	
On Street	

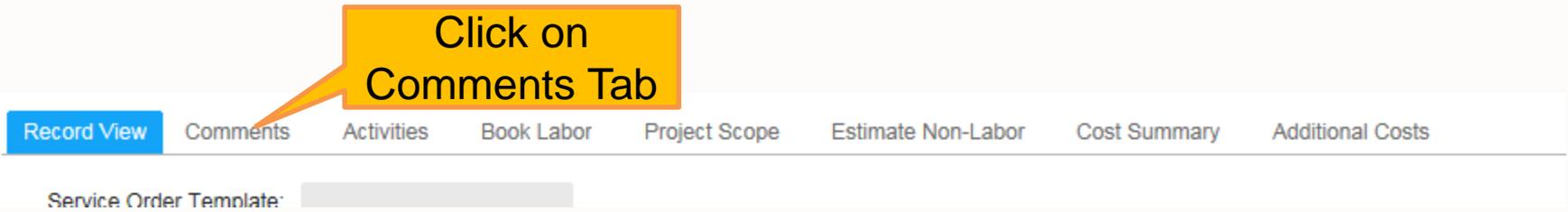
View the Detailed Estimate Report

Hover at the bottom of the PDF to view the menu



Approve the Estimate, or Don't Approve it

If you are requesting revision or not approving, please add a comment explaining why.



Approve the Estimate, or Don't Approve it

Add/Edit Comments ✕

Language: * English ▾ Print with Document:

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

Type comments here

Save

Save Cancel

Approve the Estimate, or Don't Approve it

When you approve an estimate, it is required that you update the funding source. Find the Funding Section.

Use the Look Up Tool to find the correct Funding Source

FUNDING

Funding Source: 

Funding Source (If NOT Available in List Above):

JO Description:

Allocate: 

If the funding source is not listed, type it in this field

Approve the Estimate, or Don't Approve it

The last field you have to update is the Status. Here are the options:

Status: *	Sent for CLIENT Approv
Reported By:	CLIENT Approved
Requested By Phone:	CLIENT Not Approved
Requested By Email:	CLIENT Request Revision
Date Reported:	Deferred

- Client approved means you are agree with the estimate and authorizing Public Works to move forward in doing the work
- Client not approved means you are rejecting the estimate and NOT allowing Public Works to move forward. If you select this option, please leave a comment

Approve the Estimate, or Don't Approve it

- Client request revision means you are asking for a revision in the estimate costs or scope or both. Please leave a comment detailing the explanation. This estimate will need to be developed again and will require all Public Works management approvals again since the estimate will be changing.
- The last option is Client deferred. Selecting this means you are not approving the estimate and not allowing DPW to move forward right now; however, you plan to approve this in the near future. A new estimate may need to be created at that time since new rates may impact the cost.

Approve the Estimate, or Don't Approve it

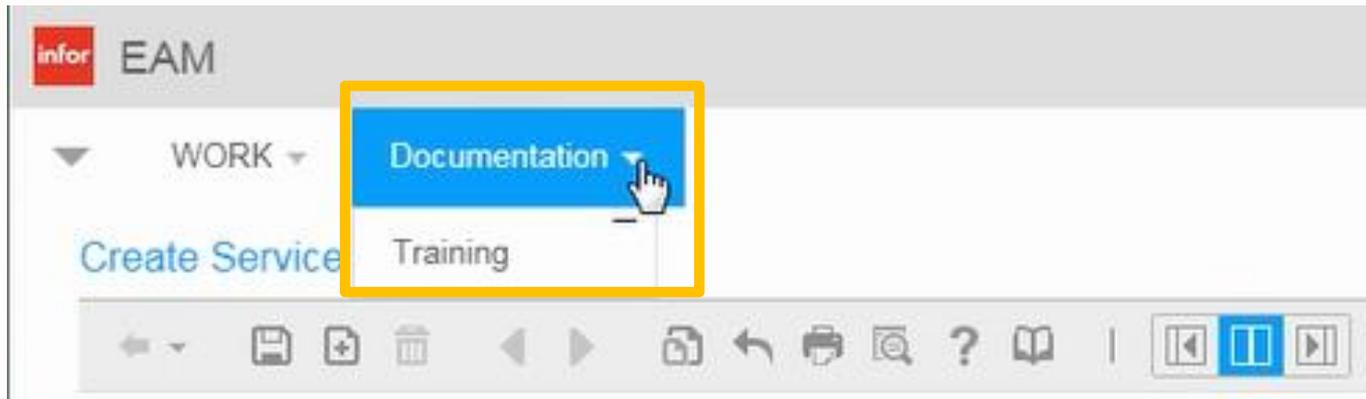
Select the option you want and click the save icon.



After approval, you the approver will receive a confirmation email and the approved service order will appear in the CMMS inbox for the planner that was involved with this estimate.

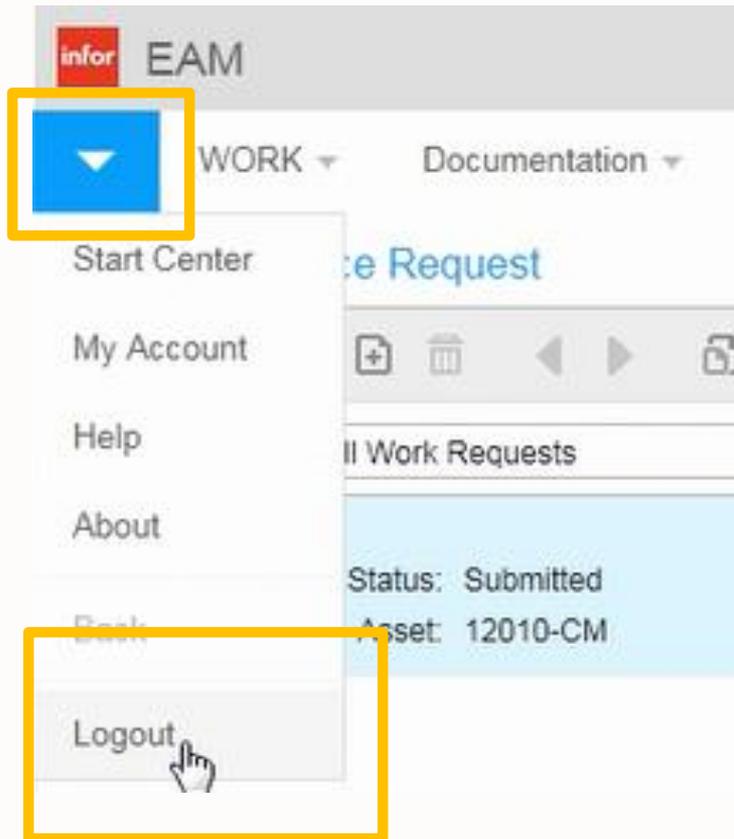
Additional Help

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

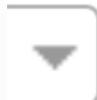


Logging out

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