



CMMS
COMPUTERIZED MAINTENANCE
MANAGEMENT SYSTEM

CMMS Differences Between Old Version (10.1.2) and New Version (11) for: RED 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

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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

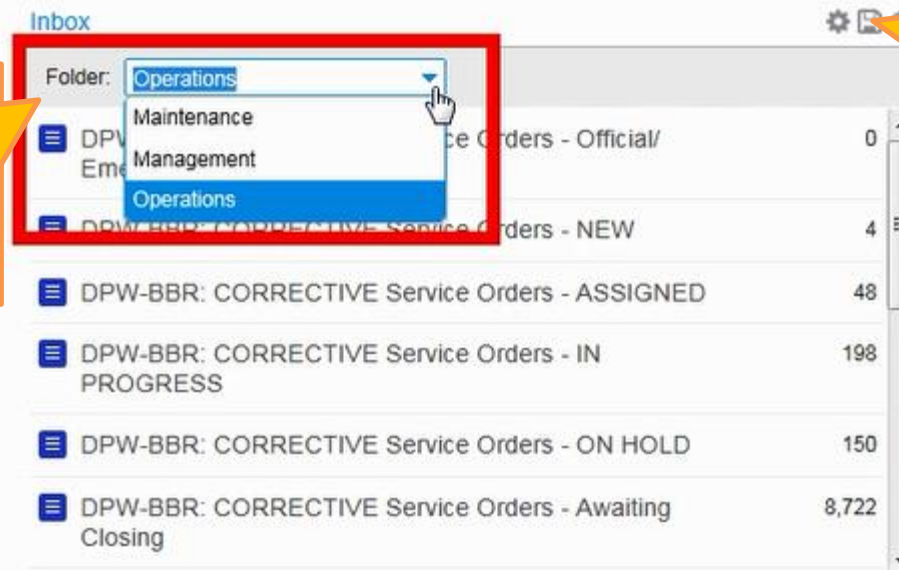
COMPUTERIZED MAINTENANCE
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Start Center

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**.

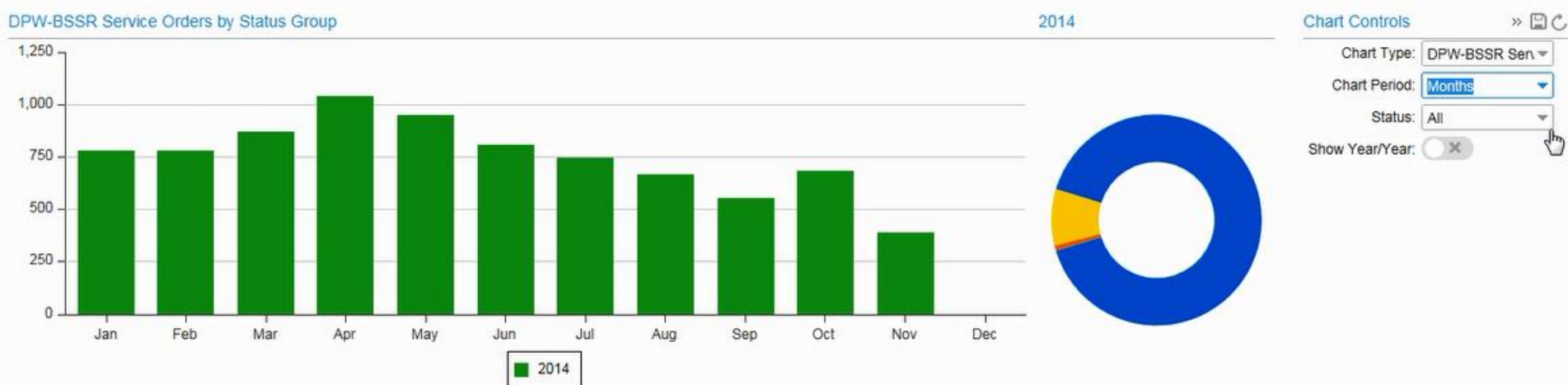
Inbox Drop
Down



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

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The screenshot shows the 'Chart Controls' section of a software interface. It includes four main controls: 'Chart Type' set to 'DPW-BBR Service', 'Chart Period' set to 'Months', 'Status' set to 'All', and a 'Show Year/Year' toggle switch. Four yellow callout boxes provide additional information: 'View by Month or Quarters' points to the 'Chart Period' dropdown; 'View different charts' points to the 'Chart Type' dropdown; 'View Open, Closed, On Hold, or ALL SOs' points to the 'Status' dropdown; and 'View single or multiple years.' points to the 'Show Year/Year' toggle switch.

Chart Controls

Chart Type: DPW-BBR Service

Chart Period: Months

Status: All

Show Year/Year: ☐

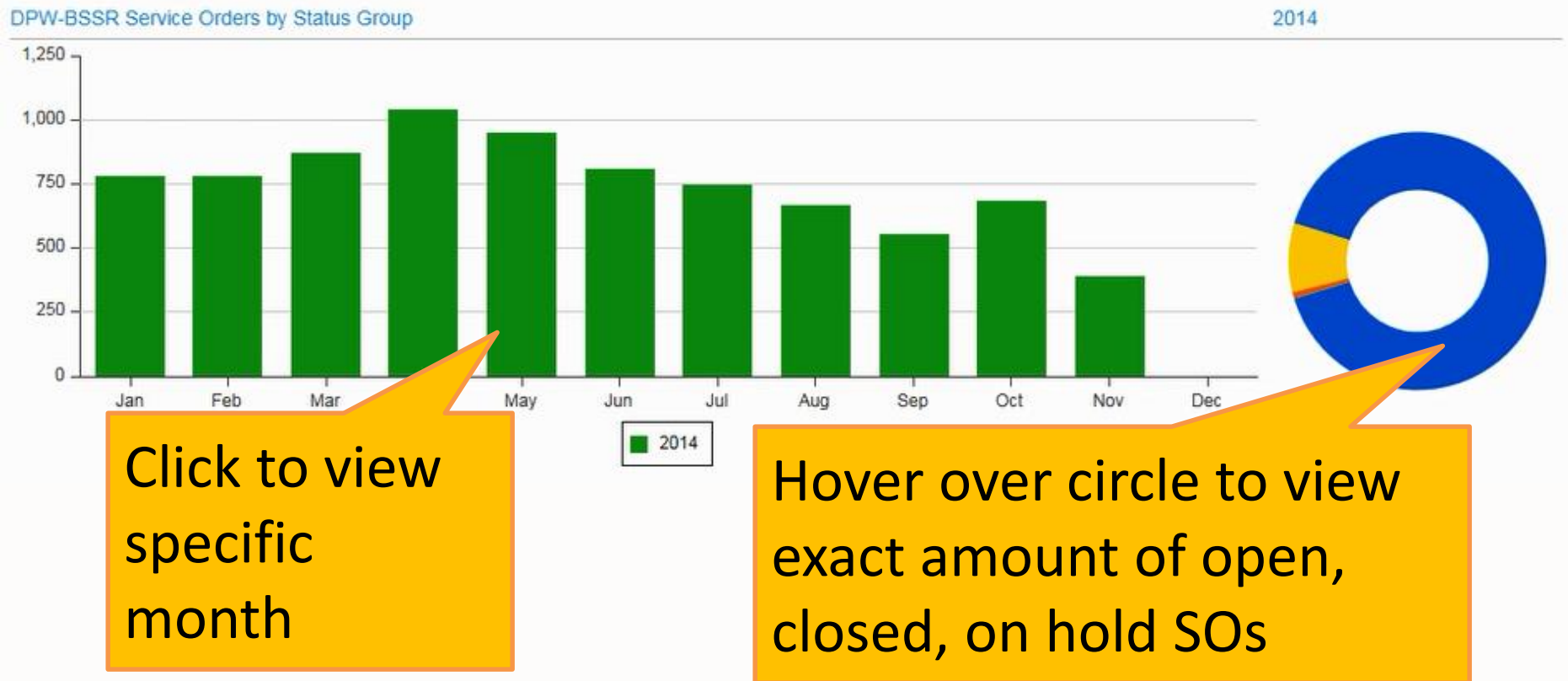
View by Month or Quarters

View different charts

View Open, Closed, On Hold, or ALL SOs

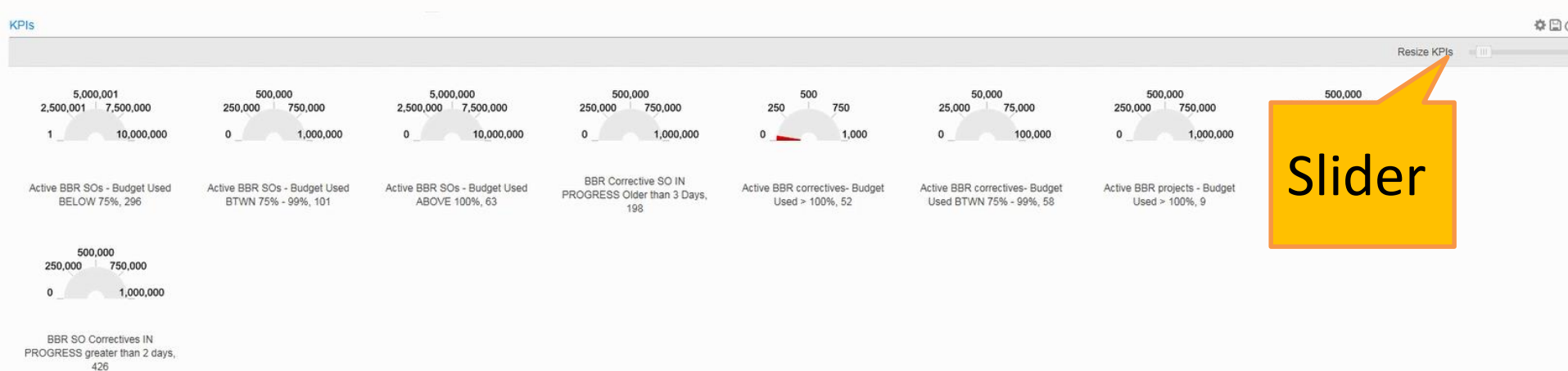
View single or multiple years.

New Chart Section



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 (Computerized Maintenance Management System) interface. The top navigation bar includes 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. Below this, the 'EAM' (Enterprise Asset Management) section is visible. The main menu area on the left side of the screen features three dropdown menus: 'WORK', 'ASSETS', and 'Documentation'. A large blue arrow points from the right side of the screen towards these menus, indicating their new location. The right side of the screen shows a sidebar with a 'WORK' dropdown menu and a 'Departments' list. A green box highlights the 'Previous Version of CMMS' text, which is overlaid on the right side of the interface.

Previous Version of CMMS



CMMS

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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 'Split View' mode. The left pane, titled 'Service Orders on Left', shows a list of service orders. The right pane, titled 'Record View on the Right', shows the detailed record view for a selected service order.

Service Orders on Left:

- 451153 - d
Status: Submitted
Asset: FACNOTUSTED4
- 451152 - Request for 2 DPW workers to move it...
Status: Accepted
Asset: 12012-03
- 451151 - door handle is loose and won't lock
Status: Submitted
Asset: 12064
- 451147 - Project Estimate
Status: Sent for CLIENT Ap...
Asset: 12060
- 451139 - door handle is loose and won't lock
Status: Submitted
Asset: 12064
- 451133 - CN TEST: Estimate Request for BBR
Status: Work Assigned
Asset: 12002
- 451127 - CN TEST: Client Request for BBR
Status: Work Completed
Asset: 12002-01
- 451060 - CN TEST: Create Client SR to DPW
Status: CLIENT Approved
Asset: 12061-EXTRBLDG

Record View on the Right:

Service Order Template: DPW-SSR-CEM-SDWL

Service Order: 451152
Request for 2 DPW workers to move items

Asset: 12012-03
Asset Owner: 1 Dr Carlton B Goodlett Pl - Floor 3

Asset Common Name: City Hall
On Street: DR CARLTON B GOODLETT
District: 06
SO Maintenance: DPW-BBR
Department: DPW-BBR
Type: Corrective
FISO: ☐
Roadway ID: 10549000

Service Order Class: FACFLOOR
From Street: GROVE ST \ POLK ST
Source System:
Source Department SO:
HUB SO:

Status: Accepted
Reported By: SHNIN4023
Requested By Phone:
Requested By Email: shwe.hnin@sfdpw.org
Requester's Department: DPW-OFFMA
Date Reported: 01/15/2015 09:29
Created By: SHNIN4023
Date Created: 01/15/2015
Source: CMMS

SERVICE ORDER DETAILS

Safety: ☐
Priority: 3 - Urgent
Problem Code: TREE
Block:
Lot:

Call Back Request?: ☐
Duplicate SO:
Parent SO:
Related SO:

COMPLETION

Failure Code:
Completion Reason:
Action Code:
Transfer To Department:

FUNDING

Funding Source: 9016-1506F
Funding Source (If NOT Available in List Above):
JO Description: Tree Maintenance FY14/1
Allocate: Y

Scheduling

Assigned By:
Service Order Lead:
SO Lead's Phone:
Veh:
Site Contact:
Site Contact Phone:
Site Contact Email:
Req. Start Date:
Sched. Start Date: 01/15/2015
Start Date:
Work Accepted Date: 01/15/2015 09:30
Work Assigned Date:



Split View

Search for Service Orders
here

The screenshot displays the CMMS Split View interface. A red box highlights the search bar in the top left corner, which contains the text "acce". A yellow callout bubble points to this search bar with the text "Search for Service Orders here". Below the search bar is a list of service orders. The first order is "455721 - Test - Anza - BBR" with a status of "Accepted" and asset "12217-RRM". The second order is "455568 - CN TEST: Submitted by another reques..." with a status of "Accepted" and asset "12217-EXTRBLDG". The third order is "455560 - Test - TN - Bayview" with a status of "Accepted" and asset "12212-PRG". The fourth order is "455555 - CNTEST - Estimate test". To the right of the list is a "Record View" tab and a search bar. Below the search bar is a form for service order details. The form includes fields for "Service Order Template", "Service Order" (455721), "Asset" (12217-RRM), "Asset Owner", "Asset Common Name" (Anza Branch Library), "On Street" (37TH AVE), "District" (01), "SO Maintenance" (DPW-BBR), and "Department". To the right of the form are fields for "Service Order Class" (FACAREA), "From Street" (GEARY BL), "Source System", and "Source Department SO".

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

Record View Comments Documents Activities Non-Labor Schedule Tools Permits Book Labor Adc

Service Order Template:

Service Order: 455721 Test - Anza - BBR

Asset: 12217-RRM 550 37th Ave - Anza Restroom - Public Men's

Asset Owner:

Asset Common Name: Anza Branch Library

On Street: 37TH AVE

District: 01

SO Maintenance: DPW-BBR

Department:

Service Order Class: FACAREA

From Street: GEARY BL

Source System:

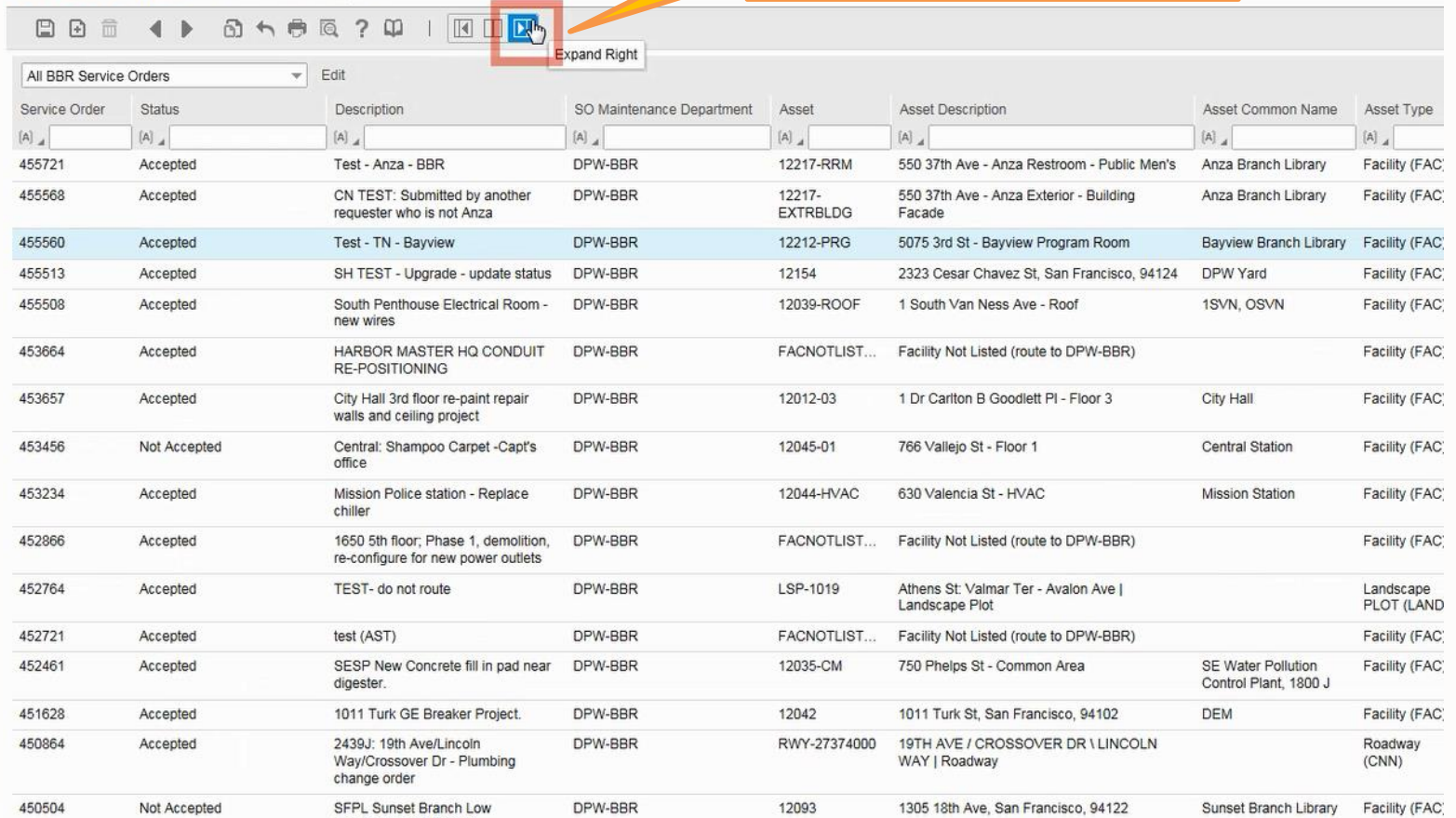
Source Department SO:

Expand Right

Expand Right to see List View

Click to expand

DPW Service Orders 455560 Test - TN - Bayview



Service Order	Status	Description	SO Maintenance Department	Asset	Asset Description	Asset Common Name	Asset Type
[A] []	[A] []	[A] []	[A] []	[A] []	[A] []	[A] []	[A] []
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 Combustion 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

operators

Find and filter using these

Record View

Service Order	Status	Description	SO Maintenance Department	Asset	Asset Description	Asset Common Name	Asset Type	Type	Priority	Funding Source	JO Description	Service Order
455721	Accepted	Test - Anza - BBR	DPW-BBR	12217-RRM	550 37th Ave - Anza Restroom - Public Men's	Anza Branch Library	Facility (FAC)	Corrective	4 - Non Urgent	9001-0093G	DDO ON	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 Francisco 94124	DPW Yard	Facility (FAC)	Estimate	4 - Non Urgent	9001-0093G	DDO ON	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			CNATH
453664	Accepted	HARBOR MASTER HQ CONDUIT RE-POSITIONING	DPW-BBR	FACNOTLIST...	Facility Not Listed (route to DPW)		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 - City Hall	City Hall	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)					BRE
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:

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:

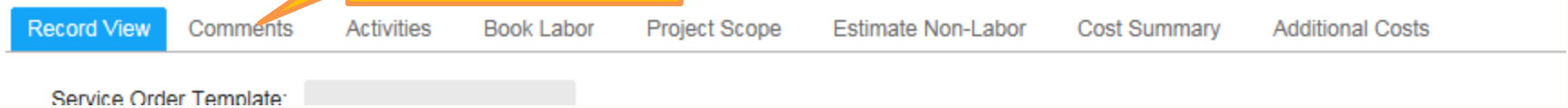
Related SO:



CIVILIS
COMPUTERIZED MAINTENANCE
MANAGEMENT SYSTEM

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 Cancel

Save

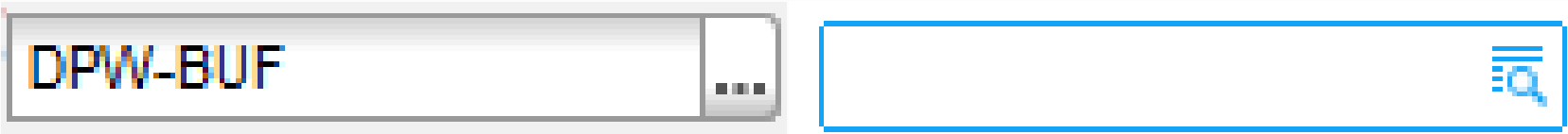
Uploaded Documents

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 details like status and asset. The main area on the right shows the 'Record View' for a specific service order. This view includes tabs for 'Record View', 'Comments', 'Documents', 'Activities', 'Non-Labor', 'Schedule Tools', 'Permits', 'Book Labor', 'Additional Costs', 'Multi-Assets', and 'Children'. Below these tabs, there are sections for 'FUNDING', 'SERVICE ORDER COST', and 'ESTIMATES'. A yellow callout box with the text 'Click to view attachment' points to a document icon in the lower right corner of the record view, which is labeled 'D17834-blue-jelly-icon-symb...'.

Icon Changes

Lookup Tool



The screenshot shows two input fields side-by-side. The left field is a standard Windows-style text box with a grey border and a small dropdown arrow on the right, containing the text "DPW-BUF". The right field is a simple white box with a blue border and a blue magnifying glass icon on the right side, indicating a search function.

Drop Down



The screenshot shows a dropdown menu. On the left is a text box with a grey border and a small downward arrow, containing the text "Corrective". To the right, the dropdown menu is open, showing a list of options: "Corrective", "Corrective", "Estimate", "Estimate Inspection", "Event", "Internal", "Project", and "Standing". The first "Corrective" option is highlighted with a blue background.

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/login.asp`. The application header includes the CMMS logo and the text "COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM". The main content area shows a form for "ADD - 10 KIRKHAM ST | Address". The form is divided into several sections: "Record View" (with tabs for Comments, Events, Costs, PM Schedules, and Structure), "LOCATION DETAILS" (including Roadway ID, On Street, Roadway Description, and From Street), "ADDITIONAL INFORMATION" (including Asset Owner, Block Number, Muni Route Type, Odd Side Street, Sweeping, Zip Code, Supervisory District, Lot Number, Bicycle Path, Even Side Street, and X/Y Coordinates), and "EXTERNAL SYSTEM ID" (including Owner ID and CALTRANS ID). A red box highlights the "Address" and "DPW Service Orders" buttons at the bottom of the form.



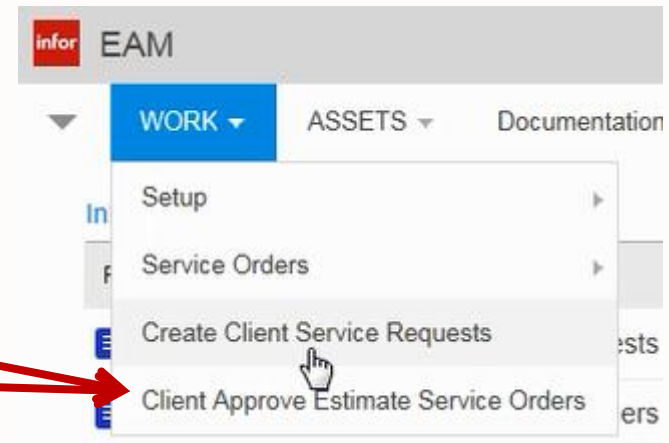
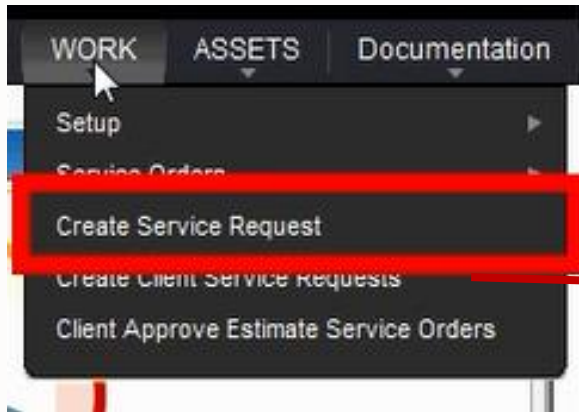
CMMS

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Enhancements

Create SR Removed

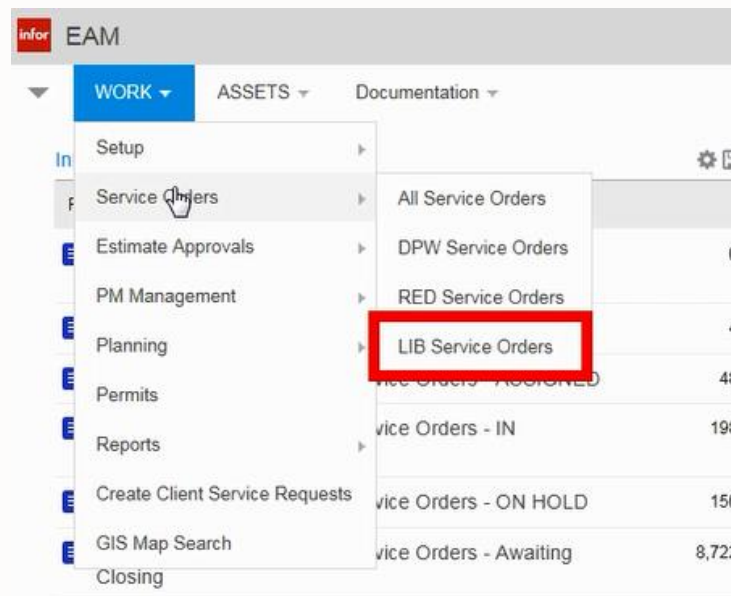
Create Service request will no longer be an option. To simplify the process, you will now use Create client SR for all SOs



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.

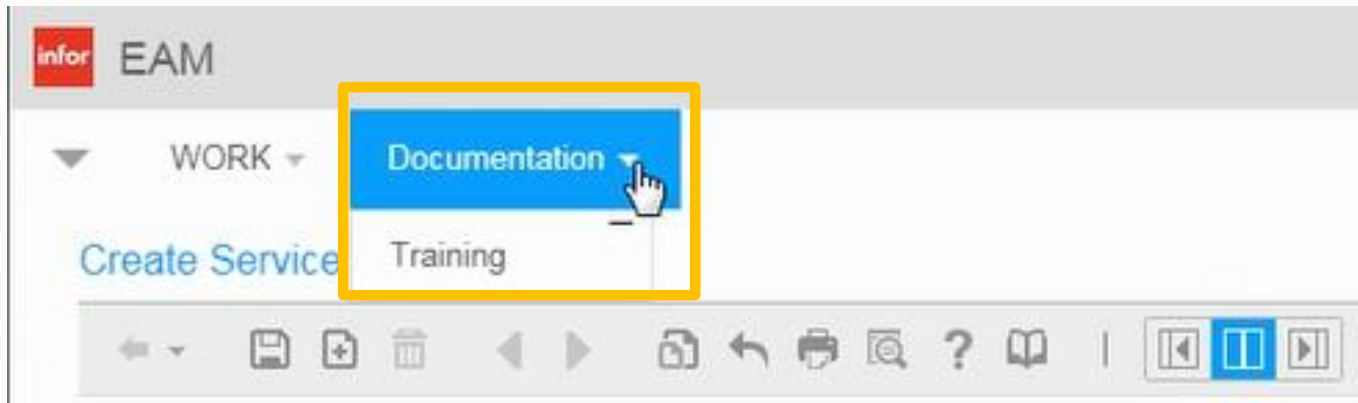


DataspY/ Filters

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

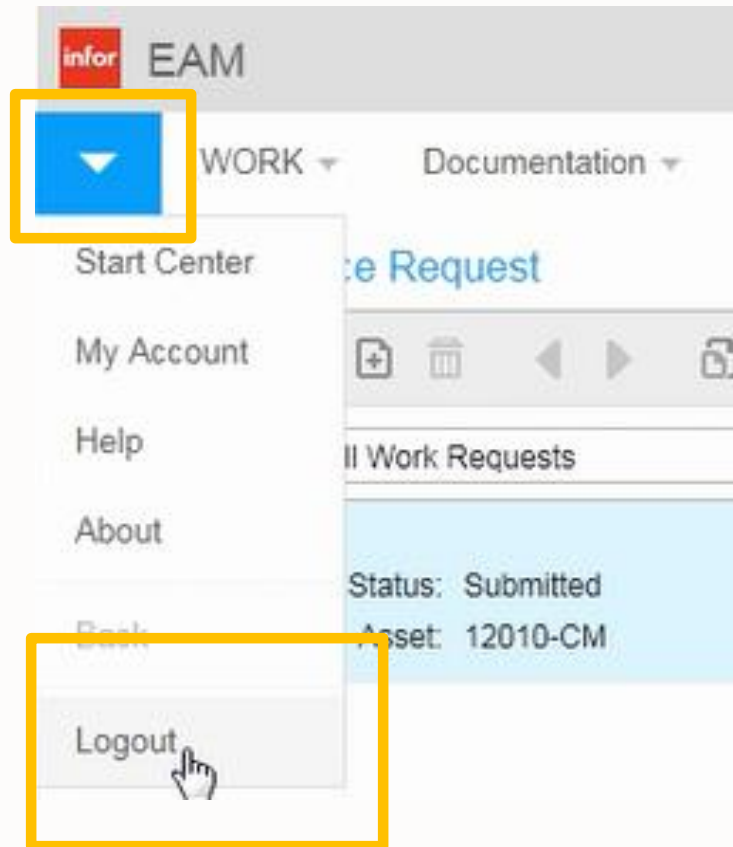
Additional Help

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