

Title: General MetaBIM SOP
Department: Engineering Services/Work Control Center
Effective Date: January 1, 2025

PURPOSE

This document outlines procedures and guidelines for processing maintenance and chargeback requests within the Computerized Maintenance Management System (CMMS), MetaBIM. This procedure allows for a coordinated response from PPM Work Control, Engineering Services, Financial Services, Custodial/Grounds/Events, Distribution, and Information Technology Services.

RESPONSIBILITY

Physical Plant Management is responsible for developing and implementing MetaBIM processes and procedures.

PPM Work Control is responsible for:

- Incoming maintenance requests via email and phone, radio call-outs, work order creation, customer requests for updates, and work order closures
- Processing of Peoplesoft chargebacks and estimates into work orders
- Assisting with the lifecycle of work orders

PPM Project Managers/Estimators are responsible for:

- Estimating new quote requests
- Working with shop supervisors and Assistant Directors to coordinate scheduling
- Monitoring work orders in the Funded Multi-Shop jobs
- Reviewing and tracking job completion
- Confirming job expense totals for billing purposes

PPM Administrators are responsible for:

- Ensuring requests are processed in a timely manner
- Working with shops and shop supervisors to review and address workload, shop schedule, and various other shop responsibilities
- Monitoring MetaBIM workbooks

PPM Engineering Services Trades Supervisors are responsible for:

- Assigning work orders to staff
- Scheduling and completing work
- Reviewing labor, material, and purchase entries for accuracy in MetaBIM

PPM Custodial/Grounds/Events is responsible for:

- Receiving chargeback requests and processing quotes
- Creating work orders and assigning them to appropriate staff
- Coordinating events with other PPM departments as needed
- Reviewing work order labor, material, and purchase entries for accuracy in MetaBIM
- Monitoring Shop Workbook

PPM Financial Services is responsible for:

- Billing work orders as appropriate
- Creating reports and progress for chargebacks, MOUs, PM, Budget Transfers, and Billing functions

PPM Distribution is responsible for:

- Maintaining warehouse module
- Entering materials requests in work orders
- Monitoring Purchase Order Module
- Adjusting Material Line Items (as needed)

PPM Information Technological Services is responsible for:

- Managing technology implementation and development of MetaBIM and associated processes
- System administration of CMMS MetaBIM, including setup and design of access templates and managing FacilitiesLink and Public Dashboard Accounts
- Making configuration changes to change features of MetaBIM
- Reviewing and managing reports of bugs and fixes
- Point of contact with MetaBIM support

PPM Logistical Services

- Receiving chargeback requests and processing quotes
- Receive material orders and process in MetaBIM
- Creating work orders and assigning them to appropriate staff
- Coordinating with other PPM departments as needed
- Reviewing work order labor, material, and purchase entries for accuracy in MetaBIM
Monitoring Shop Workbook

PROCEDURES

MetaBIM is accessible via Campus Portal Single Sign-On for staff and students. Campus users with active affiliation with the university may submit work requests and view the status of work requests, work orders, and online quotes via the Public Dashboard. Maintenance requests may also be submitted to PPM Work Control via email or phone in addition to the above Public Dashboard.

WCC processes requests and inquiries and disseminates them to the appropriate PPM Shop. Requests are assigned work order numbers and the appropriate billing codes. These work orders are processed, completed, and reviewed by Shop Supervisors and closed by Work Control once complete.

Billable requests are processed by Financial Services.

Specific processes and procedures within MetaBIM can be found in:


[HTTPS://MYCSUNEMAIL.SHAREPOINT.COM/SITES/PPM.IT/SHARED DOCUMENTS/GENERAL/APPLICATION IMPLEMENTATION/METABIM/STANDARD OPERATING PROCEDURES](https://mycsunemail.sharepoint.com/sites/ppm.it/shared/Documents/General/Application%20Implementation/MetaBIM/Standard%20Operating%20Procedures)

REFERENCES

- PPM SOP 25-2015 Work Control Center
- PPM SOP 25-2016 Routine Maintenance Work Orders
- PPM SOP 20-7000 Events Overtime Guidelines and Eligibility Procedures
- PPM SOP 19-3000 Cardholder Procurement Process

All PPM SOPs are available at the following web link:

<https://www.csun.edu/facilities/ppm-standard-operating-procedures>

APPROVED  01/08/2025

 Jason R. Wang, Senior Director Date

APPENDIX

Computerized Maintenance Management System (CMMS), MetaBIM: Physical Plant Management currently utilizes MetaBIM to create, process, and log maintenance and funded/estimated chargeback requests.

Billing Codes: Refers to the types of work orders currently utilized by PPM. These include Routine Maintenance (RM), Chargeback (CB) [funded or estimate request], Memorandum of Understanding (MOU), Preventative Maintenance (PM), Budget Transfer (BT), Deferred Maintenance (DM), Contractor Support (JOC).

REVISION HISTORY

DATE	NAME	EVENT	NOTES
12/04/2024	M Amador	Created	
12/18/2024	E Garcia	Modified	Added SOP # and name
01/08/2025	E Garcia	Final - Sent for Signature	Adobe Sign