

Title: Routine Maintenance Work Orders
Department: Engineering Services
Effective Date: February 5, 2025

PURPOSE

To define a standardized procedure for creating, documenting, and managing work orders in the Computerized Maintenance Management System (CMMS) to ensure tasks are tracked, prioritized, and completed effectively. To establish a standardized process for entering, validating, and maintaining work order data in CMMS to ensure accuracy, consistency, and reliability.

SCOPE

This SOP applies to all employees in Physical Plant Management (PPM) processing work orders in CMMS MetaBIM.

RESPONSIBILITY

The PPM Work Control Center (WCC) is the single point of contact for entering and dispatching all service requests. However, Shop Supervisors and PPM Staff may create Routine Maintenance Work Orders as needed for internal and external (campus community) requests.

PROCEDURES

Requests for Service/Repairs - The WCC receives requests for service or repairs in a variety of ways, including live phone calls, voice mail, in-person interactions, email to ppm.wcc@csun.edu, PPM's "Report-a-Problem" web page, and direct input into [MetaBIM Public Dashboard](#), PPM's CMMS. All WCC staff are responsible for monitoring all communication throughout the workday to ensure the prompt receipt and dispatching of service requests.

Requests received via telephone, voicemail, email, in-person or report-a-problem are created as Work Requests and assigned an autogenerated request number within MetaBIM by a member of the WCC staff. Once the Work Request is created and saved, a system-generated email is sent to the requestor and the indicated contact noting the receipt of the Work Request (WR), the WR unique identifier, and detailing the description of the request and the location of the issue.

Conversion of Work Requests into Work Orders - WCC staff review all Work Requests before conversion to ensure all relevant information has been captured. If needed, WCC staff contacts the initial requestor for clarification or to obtain additional information. WCC Staff determine, based on information provided by the client, whether the requested service would

require a chargeback or if the work is covered as Routine Maintenance, including linking duplicate requests to other open/in-progress requests.

Routine Maintenance Work Requests and Work Orders

- As part of the Dispatch process in MetaBIM, WCC staff review open Routine Maintenance (RM) Work Orders to determine if the current Work Request (WR) can be assigned to an existing Work Order.
- If no existing RM Work Order (WO) exists, a new WO is created, and the WR is assigned.
- WCC staff entering data adhere to standardized processing for entering work order information. Within the WO, WCC staff populate the:
 - work order title, which serves as a short description of the issue
 - location of work
 - customer name
 - workbook (shop)
 - client department, if known
 - billing code
 - priority
 - category
 - job type
 - received field

Once the WO is created in MetaBIM and assigned to the shop, the WO is available immediately to the shop for review and use for posting the appropriate labor time, materials, etc.

- Job notes: Entry into job notes should be made if additional scope of work is needed and the work order title is insufficient to describe the service request needed.
- If the matter requires immediate attention, the appropriate staff member is radio-dispatched and directly assigned to the work order. See the Priority List in the **Work Order Priority** section.

Work Order Priority – Priority is given to a work order based on the established Priority Document. The priority values are defined as follows:

- Priority 1 – Critical (Emergency): Immediate Response (call outs on radio, need immediate attention)
- Priority 2 – Urgent: Response Time - 0-4 hours response
- Priority 3 – Normal: Work is prioritized and scheduled for the next available time
- Priority 4 – Standing WO, continuous jobs

PPM staff/shop supervisor/manager may change work order priorities throughout the life cycle of the WO.

Work Order Status – Work Orders are to be placed in the correct status.

- WCC creates a WO and places it in the appropriate “Job Status” and Workbook.
- A new WO is placed in the *Requested – New Maintenance Work Order* status for RM.
- PPM Shop Supervisors are responsible for reviewing all work orders assigned to their shop no less than daily.

- PPM Staff or the Shop Supervisor are responsible for assigning work orders to their staff and changing the job status of the work order as it progresses to completion. For example, the shop supervisor updates new requests, selects the *In Progress/Assigned to Staff* status, and chooses a job staff to assign the work order.
- PPM Staff may use other job statuses when working on a work order (see Appendix).
- Shop supervisors are responsible for checking the “On Deck” status for chargeback work orders.

See Appendix A for a List of Phases and Status values available in MetaBIM. See Appendix B to see a typical status workflow.

Work Order – Shop Assignments - The Job Staff (work order assignees) review their assigned work orders and enter Labor and appropriate notes daily. Once the work is complete and the labor and materials are entered within the work orders, staff change the status to *Supervisor Review*. Entry in the Shop Notes, Pictures, and other sections is encouraged as documentation, which might help review the work order.

Work Order Review - Shop Supervisors are to review *Supervisor Review* work orders daily, ensuring the appropriate time and material charges are entered, and then once the work order is complete, update the status to *Shop Verified*.

Work Order Completion- Work Orders in *Shop Verified* status are reviewed by WCC staff and moved to the *Completed* phase. On Friday at midday, all work orders from the previous week are hard closed (archived). No changes can occur with the work order unless it is reopened.

Work Order – Past Due – Work Orders are generally considered past due if the Open Date exceeds 30 days. PPM Staff may use MetaBIM queries and canned aging reports to see past-due work orders. Shop Supervisor/Managers/Assistant Directors are responsible for reviewing past due work orders and taking appropriate action to review, reprioritize, reassign, move to completion, or close/cancel the work order. Past-due work orders should be reviewed daily (no less than weekly). Work Orders open past 60 days should have job notes from Shop Staff/Shop Supervisors/Managers/Assistant Directors indicating the reason for the delay.

Work Order – Notifications – System-generated emails are sent based on default role notifications specified in MetaBIM. The following are examples of the default notifications:

- Job Owner, Job Staff: notified when assigned or when phase changes
- Customer: When a new work order is created and moved to the Work Complete Phase

REFERENCES

Specific processes and procedures within MetaBIM can be found in:

- <https://www.csun.edu/facilities/ppm-standard-operating-procedures>
- HTTPS://MYCSUNEMAIL.SHAREPOINT.COM/SITES/PPM.IT/SHARED_DOCUMENTS/GENERAL/APPLICATION_IMPLEMENTATION/METABIM/STANDARD_OPERATING_PROCEDURES

MetaBIM Public Dashboard: <https://csun.metabim.com/public/Default.htm>

Report A Problem Page: <https://www.csun.edu/facilities/report-problem>

Signature: 

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APPROVED















Jason R. Wang, Senior Director

02/25/2025

Date

APPENDIX A

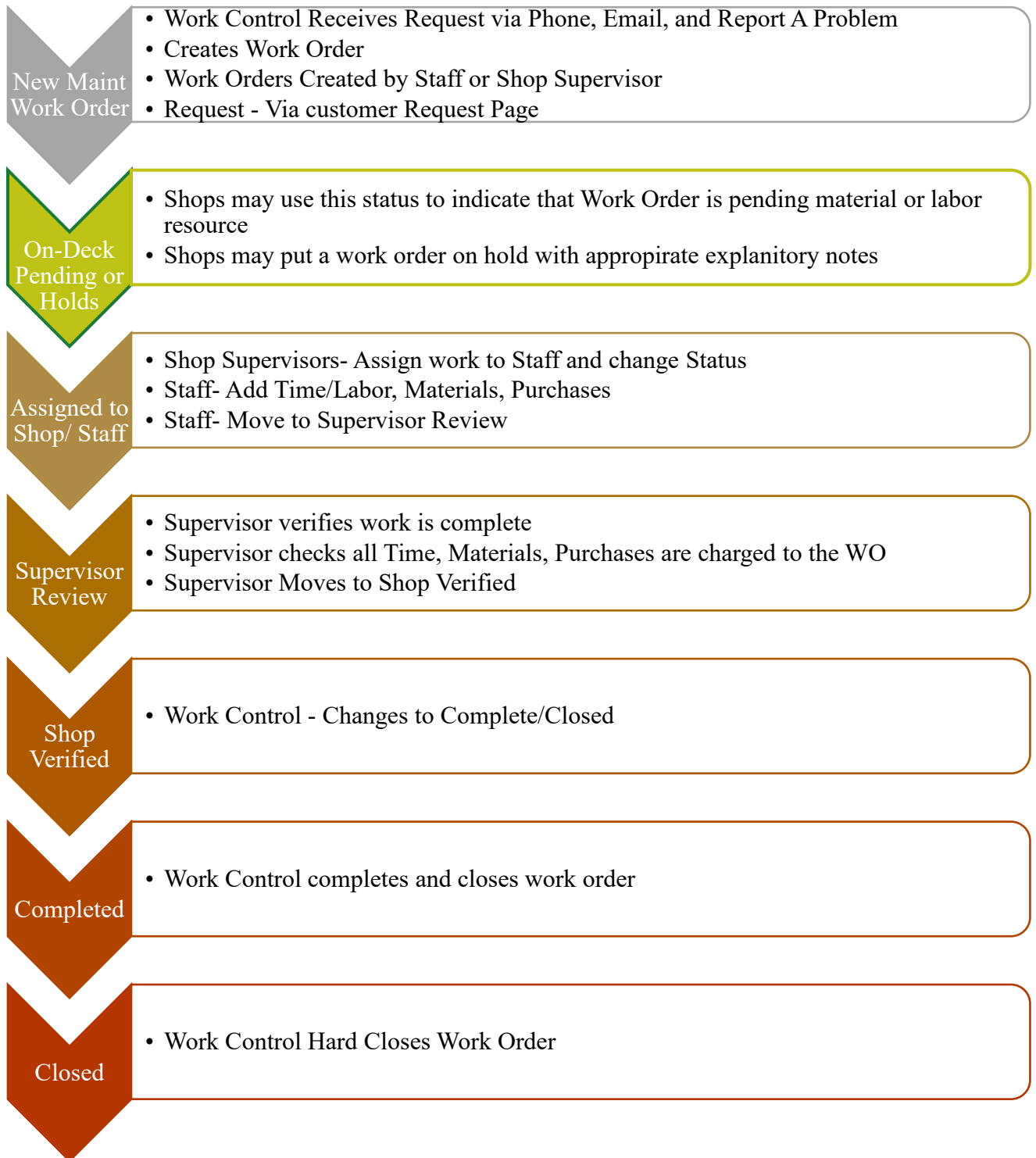
Work Order Phases and Statuses

Phase	Status	Description	Notes
 Requested	New Maintenance Work Order	RM new work order	WCC place new work orders to workbooks in this status when assigning to shops
 Requested	New Funded Work Order	CB new work order	WCC place new work orders to workbooks in this status when assigning to shops
 Requested	New Quote Requested	A quote has been requested	
 Planning	Quote In Progress	WO assigned to project estimation team	
 Planning	Quote Completed	The project estimation team quote was completed	
 Planning	Waiting on Customer	WCC sends a quote to the customer for review and places WO in this status	
 Planning	Work Planning	Status used to indicate that work order is in the planning phase	
 On Deck	Pending Assignment	Work order is pending labor resource	
 On Deck	Pending Materials	Work order is pending materials	
 On Deck	Approved by Customer	The customer approves the quote or work order, and is ready to proceed	
 On Deck	Hold/Miscellaneous	Work order is Hold or pending other issues	
 In-Progress	Assign to Shop	Shop or shop staff review work orders in their workbook in the Requested phase and change to Assign to Shop Status	Used by WCC for immediate dispatch (over radio).
 In-Progress	Assign to Staff	Shop or shop staff assign work orders to specific staff	
 In-Progress	Assigned to Vendor	Status to indicate vendor is performing	Shop or shop staff are responsible for

		work to complete work order	monitoring the progress of work by vendor updating work order as necessary
✓ Work Complete	Supervisor Review	WO complete, shop staff changes to this status when work is completed	
✓ Work Complete	Missing Time/Materials	Administrative staff places WO in status and when time/material entries are missing	
📖 Final Review	Shop Verified	Shop supervisor changes WO status to this status to complete work order	
📖 Final Review	Need Funds	WO is pending CB or other funding	
📖 Final Review	Project Manager Review	WO needs to be reviewed by the Project Manager	WCC uses this to notify the project manager that it needs to review the work order for completeness
📖 Final Review	Project Manager Approved	The Project Manager has approved WO to proceed to next step	
★ Completed	Ready to Bill	Status to notify PPM Finance that WO is ready to proceed to billing	
★ Completed	Closed	WO is closed	Work order can be "Hard Closed" to prevent further changes
★ Completed	Duplicate WO	WO is duplicate; no further action is needed	Duplicate work orders be linked as a child if needed
★ Completed	Cancelled	WO has been canceled; no further action is needed	

APPENDIX B

Typical status workflow of a work order.



REVISION HISTORY

DATE	NAME	EVENT	NOTES
12/04/2024	M Amador	Created	
12/18/2024	E Garcia	Modified	Added SOP # and name
01/23/2025	E Garcia	Modified	Add Appendix Phase/Status
01/30/2025	E Garcia	Modified	Modified for clarity
02/05/2025	E Garcia	Modified	Added Appendix B