WELCOME TO MAXIMO SUITEREQ

Look for the FLASHING RED AND YELLOW ARROWS [NEW] by each document, program or tutorial on the Maintenance Website for Site Users to find them easily and view, download or create shortcuts for easy access.

SuiteReq is an interface program that works with Maximo to create site-based Work Orders to address maintenance issues at your site!

You will now be inputting work orders into Maximo via SuiteReq!

Priorities will be automatically assigned to the work order based on entry selections!

DIRECTIONS TO SITE USERS WHO ARE TAKING THE ONLINE MAXIMO SUITEREQ TRAINING :

1. Go to the *Maintenance Website-Technology– Computer Training Documents– Easy Step Guide for SuiteReq* (print and/or save the training document)

2. When you have a few minutes view the SuiteReq Online Tutorial found on the same page.

3. Go back to the *Maintenance Website Homepage*, scroll to the bottom of the page, print and/or save the *Maximo SuiteReq Categories* Document for your use each time you input a Work Order. This Category and subcategory list will be invaluable when determining which category best fits your repair request and should be at your disposal when putting in WOs. As we revise this list, it will be reflected on the revision date at the bottom of the document.

4. Select *Maximo SuiteReq* Link on the Maintenance Department Homepage to open and place a shortcut on your computer desktop for easy access each time you need to input a site work order.

5. Log into the program using your Maximo User Name and Password (in lower case). Utilize the detailed screen by screen instructions provided on the to enter the information regarding your maintenance repair request into SuiteReq which interfaces and creates the WO in Maximo.

Reminder: If you would like to attend a SUITEREQ CLASS, contact the Maintenance Trainers @ 799-5204 Ext 5199, 5155. The trainers and the Maximo Help Desk at 799-1600 are also available to assist. Please don't hesitate to call if you need assistance!

Revised 4/27/12

Welcome to Suite Req

Login to SuiteReq using your existing Maximo User Name and Password. (Lower case only)

Once in Suite Req, _all typed entries must be entered in CAPITAL LETTERS._

The "Language Field" automatically defaults to "ENGLISH". (DO NOT CHANGE)

Select the Login Icon to log into SuiteReq...It will open to the start center on the OWR Tab

The OWR Tab in SuiteReq will open to a blank template to create a Maximo Work Order. Work Order creation fields will consist of drop down lists, icons and fill-in fields. Some fields are only required for certain applicable requests. They will be left blank when not applicable. Required fields will be denoted by an asterisk (*) immediately after the field title.
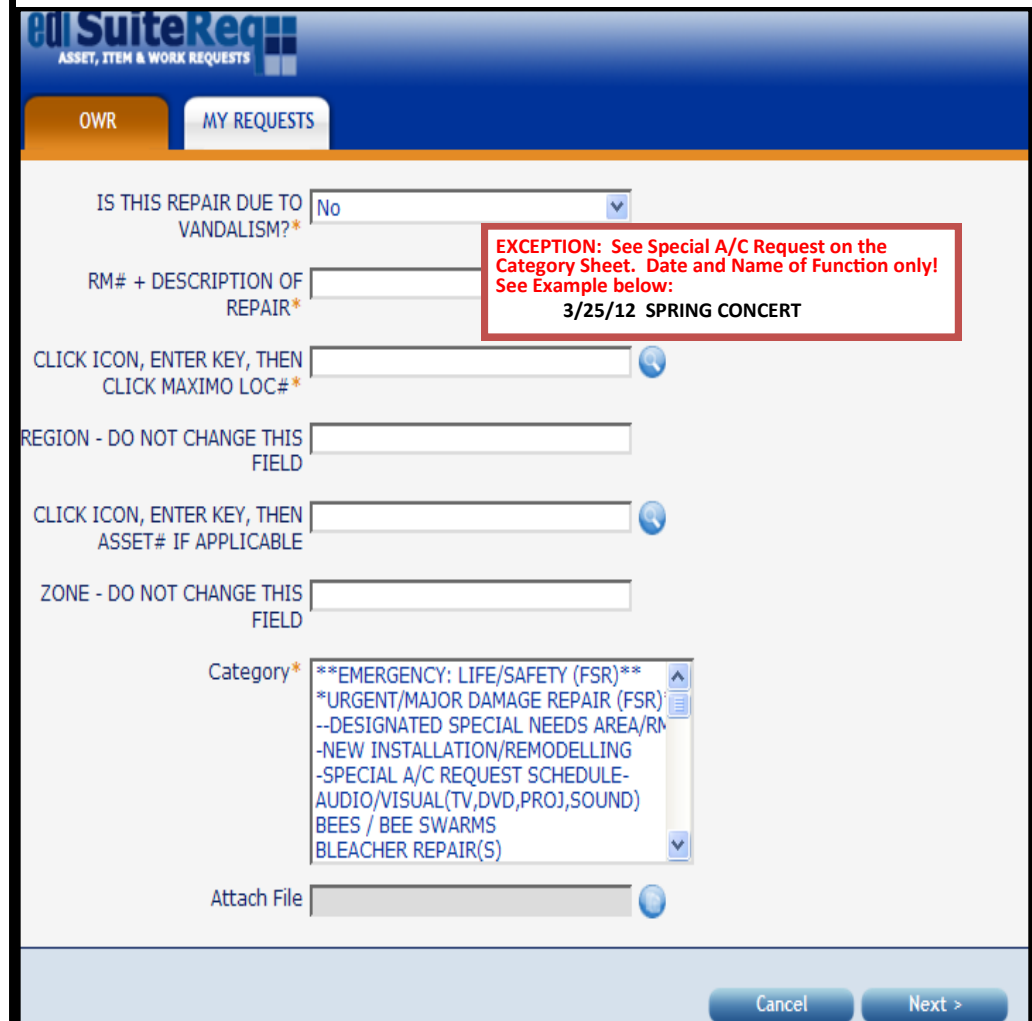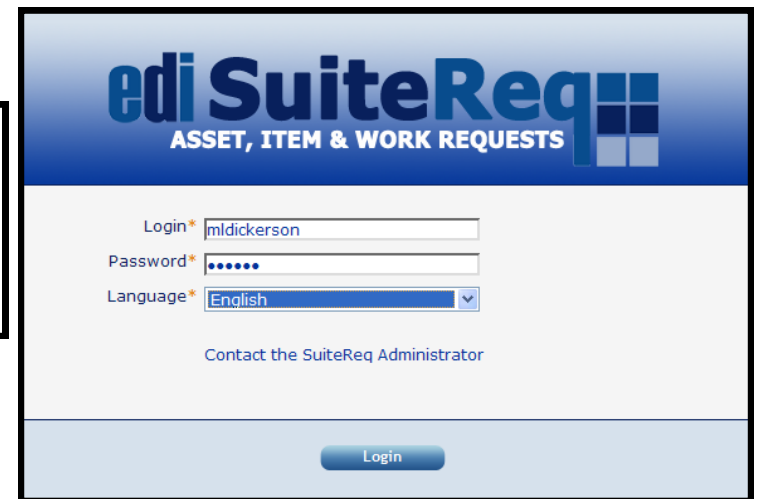
Any field with an icon such as a magnifying glass requires the user to click on the icon to access a window that will open for selections to fill in the field.   If the field title is followed by the words _DO NOT CHANGE THIS FIELD_, it will auto-fill based on selections from prior fields. **Sometimes this auto fill field will be blank (such as the Zone Field)**, leave it blank as it is for maintenance use only.

When there is a window field such as the "Category" window, use the "Slide bar _or_ up/down arrows" to scroll and make a choice from the list provided. Click on the correct choice to highlight and then continue to the next field.

If the user would like to attach supporting documentation, the Attach File Icon to the right of the field, functions just like other programs to browse and select the file and save it to the Work Order for others to view as part of the record.

REVIEW—AVOID COMMON ERRORS IN SUITEREQ

(Last Page of this Document)

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edi SuiteReq
ASSET, ITEM & WORK REQUESTS

Login* mldickerson
Password* •••••
Language* English

Contact the SuiteReq Administrator

Login

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edi SuiteReq
ASSET, ITEM & WORK REQUESTS

| OWR | MY REQUESTS |

IS THIS REPAIR DUE TO VANDALISM?* — No

EXCEPTION: See Special A/C Request on the Category Sheet. Date and Name of Function only!
See Example below:
3/25/12 SPRING CONCERT

RM# + DESCRIPTION OF REPAIR* —

CLICK ICON, ENTER KEY, THEN CLICK MAXIMO LOC#* —

REGION - DO NOT CHANGE THIS FIELD —

CLICK ICON, ENTER KEY, THEN ASSET# IF APPLICABLE —

ZONE - DO NOT CHANGE THIS FIELD —

Category* —
EMERGENCY: LIFE/SAFETY (FSR)
*URGENT/MAJOR DAMAGE REPAIR (FSR)
--DESIGNATED SPECIAL NEEDS AREA/RM
-NEW INSTALLATION/REMODELLING
-SPECIAL A/C REQUEST SCHEDULE-
AUDIO/VISUAL(TV,DVD,PROJ,SOUND)
BEES / BEE SWARMS
BLEACHER REPAIR(S)

Attach File —

Cancel   Next >

When filling in "RM# **AND** DESCRIPTION OF REPAIR* field, the exact location of the problem at your site **AND** a brief description of the problem **MUST** also be entered. This is what will populate the short description field in Maximo on the Work Order. See Example to the left!

Reminder: **(ALL ENTRIES ONCE IN THE PROGRAM MUST BE IN ALL CAPITAL LETTERS)**

Click on the icon next to the Location field, a pop up window will open. Immediately, select the enter key and a table will appear in the window populated by the site/s codes designated for the person creating the work order. Clicking on the location number from the table and the window will close. The location field and Maintenance Region will now be populated on the request.

ASSET FIELD-**(Not a mandatory field)**- Select the Icon next to the Asset Field and a window will open with all assets that have been tagged at your site. The only time we ask that you include the Asset Number on your WO is for copiers. If you know the asset number for the copier that needs repair, pick it from the list, or type it in the field.

ZONE-DO NOT CHANGE THIS FIELD–This field will *AUTO POPULATE* if there is supposed to be something it in. (**DO NOT** enter Information into this field and do not remove information, once it populates)

VANDALISM SELECT TIME FIELD-
Use the blue drop down arrow to select the correct entry.
Choices are:
- UNKNOWN TIME OF VANDALISM
- VANDALISM AFTER SCHOOL HOURS
- VANDALISM DURING SCHOOL HOURS

A correct selection in the Category field will generate the necessary fields throughout the rest of the process to provide a request that is complete with all required information.

Use the blue up/down arrows to scroll the list of choices and highlight your selection by left clicking on the category which will highlight your choice in dark blue and then tab or use your <u>MOUSE</u> to navigate to the next field. **(DO NOT USE THE UP OR DOWN ARROWS FROM THE KEYBOARD)**

To attach a file: select the icon next to the (Attach File Field), browse, name and then save. Once you add an attachment, another attachment field will appear to add other files as needed. (See Example Window)

Note: Attach inspection reports and any applicable photographs (jpg) that would be crucial to understanding the repair issues. If you attach a file, make a note in the details box for reference.

Select the "Next" icon to advance to the next screen.

The fields that appear on this next screen will vary depending on the Category choice from the previous page. The choices should be self-explanatory.

Note: <u>ONLY</u> add information (IN CAPITAL LETTERS) to the DETAILS field that will help further explain the nature of your request, such as "SEE ATTACHMENT, or POSSIBLE HAZARD, ETC. .

Examples: "What size Window"? Were you able to shut the water off?

Select the "Next" icon to advance to the next screen.

To assist during the process of building the WO, there is a feeder screen to the right of the window that updates with each entry. This screen enables the user to monitor all entries throughout the process.

Once all fields have been filled in for the particular category selected, the COLLECTING INFORMATION screen will appear so all information entered can be reviewed before saving the record and actually creating the Maximo Work Order.

If a "Possible Duplicates Found" message appears below the collected information window, (check the content of the Possible Duplicate displayed) This would afford the option to CANCEL the request before creating a duplicate record accidently.

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edi SuiteReq
ASSET, ITEM & WORK REQUESTS

Hello DICKERSON LISA. Welcome to SuiteReq.   Logout

| OWR | MY REQUESTS | | Version 6.0 |

Collected Information	
IS THIS REPAIR DUE TO VANDALISM?	Y
AREA/ROOM(S) WHAT NEEDS REPAIR?	50's BOYS RESTROOM PLUGGED-STALL MARKED OUT OF ORDER
CLICK ON YOUR LOCATION	1035
CLICK ON YOUR LOCATION Description	GREEN VALLEY HS
DO NOT CHANGE (YOUR WO WILL NOT PROCESS)	SE
Category	PLUMBING
PRIORITY SUPPLIED	3
WORKTYPE SUPPLIED	CM
SUPERVISOR SUPPLIED	AEWILLIAMS
DETAILS	TOILET PLUGGED IN BOYS RESTROOM IN 50'S WING. STUFFED WITH PAPER TOWELS.
SELECT PLUMBING REPAIR	CLOGGED TOILET(S)
Attach File	C:\untitled.JPG

Cancel   < Back   Save

Cancel   Will cancel the information just entered with no Maximo WO Created

< Back   Use this Icon if you haven't saved yet, to go back and edit fields before saving

Save   Will turn your request into a WO and generate the WO number.

What does Possible Duplicates Found Mean?

Example of Duplicate: If there is already a request in the system that could possibly be a duplicate for the one you just entered, SuiteReq will display the record at the bottom of the page. If the request you entered has already been entered, select the CANCEL button. If it is different from the request you are entering, go ahead and SAVE the record to create a WO.

OWR | MY REQUESTS | Version 6.

Collected Information

IS THIS REPAIR DUE TO VANDALISM?	N
AREA OR ROOM# AND WHAT NEEDS REPAIR?	RM 508 MUSIC RM CELLO NEEDS REPAIR
CLICK ON YOUR LOCATION	1035
CLICK ON YOUR LOCATION Description	GREEN VALLEY HS
REGION - DO NOT CHANGE THIS FIELD	SE
Category	MUSICAL INSTRUMENTS
PRIORITY SUPPLIED	4
COMMODITYGROUP SUPPLIED	EQREP
SUPERVISOR SUPPLIED	TLBURNS
PICK UP INSTRUMENT(S) FROM ROOM#	MUSIC RM 508
CONTACT PERSON	MR. MCKINLEY
LIST TTL/INSTRUMENT/REPAIR/SERIAL#	CELLO 3530058
WORKTYPE SUPPLIED	CM
PIANO TUNING REQUIRED?	NO

Possible Duplicates found.

Work Order	Description	Location	Asset	Status	Reported by	Reported at
227103	Category: MUSICAL INSTRUMENTS Description: RM 508, MUSIC RM CELLO NEEDS REPAIR PICK UP INSTRUMENT(S) FROM ROOM#: MUSIC RM 508 CONTACT PERSON: MR. MCKINLEY LIST TTL/INSTRUMENT/REPAIR/SERIAL#: 530058 PIANO TUNING REQUIRED? NO	1035		WAPPR	MLDICKERSON	11/10/2011 07:36

Cancel | < Back | Save

Once the record is "Saved" the next screen will reflect that a "New Request was created in Maximo", and will give you the WO Number for your reference.

At this point you could create another "Like" Request easily by selecting the "Duplicate" button which will create a new request with all the same information and then modify only the fields that are different such as a different make, model, OMR # and the location and problem of the machine, (if it was a copier or musical instrument, for example).

If you need to create another "brand new" Request, select the "Start Again" button and repeat the process from the beginning.

NOTE: IT MIGHT BE HELPFUL TO PRINT A COPY OF THE WO DISPLAYED (AT THIS POINT) , AND POST IT WHEREVER THE WORK IS TO BE DONE, IN CASE WORKERS SHOW UP AFTER HOURS AN NO ONE IS THERE!

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edi SuiteReq
ASSET, ITEM & WORK REQUESTS

Hello DICKERSON LISA. Welcome to SuiteReq.   Logout

OWR   MY REQUESTS   Version 6

New request created in Maximo. Key is WORKORDER Site=MAINT Work Order=227098

Collected Information	
Work Order	227098
IS THIS REPAIR DUE TO VANDALISM?	Y
AREA/ROOM(S) WHAT NEEDS REPAIR?	50's BOYS RESTROOM PLUGGED-STALL MARKED OUT OF ORDER
CLICK ON YOUR LOCATION	1035
CLICK ON YOUR LOCATION Description	GREEN VALLEY HS
DO NOT CHANGE (YOUR WO WILL NOT PROCESS)	SE
Category	PLUMBING
PRIORITY SUPPLIED	3
WORKTYPE SUPPLIED	CM
SUPERVISOR SUPPLIED	AEWILLIAMS
DETAILS	TOILET PLUGGED IN BOYS RESTROOM IN 50'S WING. STUFFED WITH PAPER TOWELS.
SELECT PLUMBING REPAIR	CLOGGED TOILET(S)
Attach File	C:\untitled.JPG

Start Again   Duplicate

Do not use the duplicate feature to begin the next WO if you attached a file to the previous one.

Put the cursor in the Work Order Field at the top of the screen and select the enter key on the keyboard to display all Work Orders you have entered into Maximo. At this time, SuiteReq will only display the WOs you entered, not the other users at your site. View the details with added notes and the status of the WO from this list or follow the directions in the next box to link to Maximo to view Actuals or other details of the WO (as needed).

OWR	MY REQUESTS			Version 6.
	Application	Work Order	Description	Show
	OWR (Online Work Request)			200

PLACE THE CURSOR IN THE WORK ORDER FIELD WHEN THE MY REQUESTS TAB OPENS. SELECT ENTER ON THE KEYBOARD TO VIEW LIST OF WOs THAT WERE PUT IN BY THE LOGGED IN USER.

Work Order	Description	Status	Status changed	Rep

If you need to see more details of a work order, left click on the WO number to select and Suite Req will redirect you to Maximo. If you are not logged in, it will take you to the log-in screen. If you are already logged in, it will route you directly to the Maximo WO number in question where you can view details, actuals, etc.

OWR	MY REQUESTS					Version 6.

Application: OWR (Online Work Request) Work Order: 227103 Description: Show: 200 Found: 250 [Search]

Work Order	Description	Status	Status changed	Reported by	Reported at
227123	Category: MUSICAL INSTRUMENTS Description: MUSIC ROOM 55, CELLO NEEDS REPAIR PICK UP INSTRUMENT(S) FROM ROOM#: RM 56, STORAGE IN MUSIC ROOM CONTACT PERSON: MR. MCKINLEY LIST TTL/INSTRUMENT/REPAIR/SERIAL#: ALSKJDLAJFAJFDJASLKJ PIANO TUNING REQUIRED?: NO	APPR	11/10/2011 13:56	MLDICKERSON	11/10/2011 12:26
227120	Category: MUSICAL INSTRUMENTS Description: MUSIC ROOM 55, CELLO NEEDS REPAIR PICK UP INSTRUMENT(S) FROM ROOM#: RM 56, STORAGE IN MUSIC ROOM CONTACT PERSON: MR. MCKINLEY LIST TTL/INSTRUMENT/REPAIR/SERIAL#: ALSKJDLAJFAJFDJASLKJ PIANO TUNING REQUIRED?: NO	APPR	11/10/2011 13:58	MLDICKERSON	11/10/2011 12:25
227103	Category: MUSICAL INSTRUMENTS Description: RM 508, MUSIC RM CELLO NEEDS REPAIR PICK UP INSTRUMENT(S) FROM ROOM#: MUSIC RM 508 CONTACT PERSON: MR. MCKINLEY LIST TTL/INSTRUMENT/REPAIR/SERIAL#: 530058 PIANO TUNING REQUIRED?: NO	WAPPR	11/10/2011 07:33	MLDICKERSON	11/10/2011 07:36
227098	Category: PLUMBING Description: 50's BOYS RESTROOM PLUGGED-STALL MARKED OUT OF ORDER DETAILS: TOILET PLUGGED IN BOYS RESTROOM IN 50'S WING. STUFFED WITH PAPER TOWELS. SELECT PLUMBING REPAIR: CLOGGED TOILET(S)	WAPPR	11/09/2011 13:25	MLDICKERSON	11/09/2011 13:50
226896		WAPPR	08/19/2011 09:57	MLDICKERSON	08/19/2011 09:57
226761		CLOSE	06/29/2010 10:22	MLDICKERSON	06/29/2010 10:17
226760		INPRG	06/23/2010 12:19	MLDICKERSON	06/23/2010 12:19
226509	EXIT SIGNS ON OFFICE ARE NOT LIGHTING UP...NEED REPAIR, EMS FOUND WHILE DOING INSPECTION	WAPPR	04/15/2010 07:16	MLDICKERSON	04/15/2010 07:16
226501	NTC	CLOSE	02/18/2010 12:20	MLDICKERSON	02/18/2010 12:17
226500		CLOSE	02/18/2010 12:16	MLDICKERSON	02/18/2010 12:11

AVOID COMMON ERRORS IN SUITEREQ

CAPITAL LETTERS! **Please make sure to use CAPITAL LETTERS for all entries in SuiteReq!** If you don't, the request will be cancelled and it will be necessary to resubmit a new request.

LOCATION SELECTION (MOST ACCURATE WAY TO ENTER) - Always use the Icon to the right of the Maximo Location Field to ensure the correct Maximo Location code is filled in on the WO being created.

ASSET SELECTION - Make a cheat sheet for the copiers at your site and enter the Asset number when inputting a WO for the copier. All others asset numbers can be entered by the technician after the repair...when in doubt, please **DO NOT** just select a random asset number! Also, if an asset automatically fills in each time you enter a WO Request, remove the number from the field. Asset field should only reflect the piece of equipment being worked on!

EXTERNAL INSPECTION VIOLATION ENTRIES - If the WO is being entered for an inspection item, there is an Inspection Category. This category **(INSP: HEALTH, FIRE, OSHA, STATE) MUST** be selected for all External Inspection items for outside agencies such as Health, Fire, OSHA, and State. Date of re-inspection must be included in the details field of the WO for reference.

INTERNAL INSPECTION VIOLATIONS - Inspections done by Internal CCSD Inspectors should be entered under the specific category of the repair, but the details field of the WO should reflect the date the repair is to be completed.

NEW INSTALLATION/REMODELLING - If the request is for something being installed for the first time or renovation to something that already exists, **SELECT** New Installation/Remodeling category.

DESIGNATED SPECIAL NEEDS AREA/RM - ONLY be select with there is a repair that is needed in a **special needs classroom area. Do not use this category selection unless the work being requested meets this guideline. When in doubt, contact the FSR for assistance.**

FOR REPAIR OF ELECTRIC CARTS AND SWEEPERS CONTACT FLEET MAINTENANCE MANAGER, MIKE GROOM AT mwgroom@interact.ccsd.net

For assistance with Category selection, call the maintenance trainers at 799-5204, Ext 5199 or 5155.

THE HELP DESK IS ALSO AVAILABLE @799-1600, 6 am to 3:30 pm, Monday—Friday!

FSRRs, FSRs can also assist!