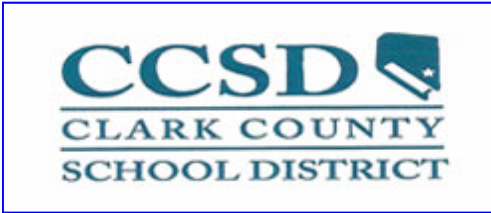


# Maximo Work Order Application Training



## MAINTENANCE TECHNICIAN WORK ORDER INSTRUCTIONS ACTUALS, PREMIUM PAY, MATERIALS, FAILURE REPORTING AND WORK ORDER COMPLETION

LOG ON TO MAXIMO WEBSITE. WITHIN THE FACILITIES SERVICES DEPARTMENT MOST COMPUTERS WILL HAVE THE "WELCOME TO MAXIMO" ICON ON THE DESKTOP.

**CLICK ON MAXIMO ICON (ON DESKTOP)**

**MAXIMO LOG ON SCREEN WILL APPEAR**

**TYPE YOUR USER NAME IN THE USER NAME BOX**  
User Name and Password must be typed in (LOWER CASE) Letters.

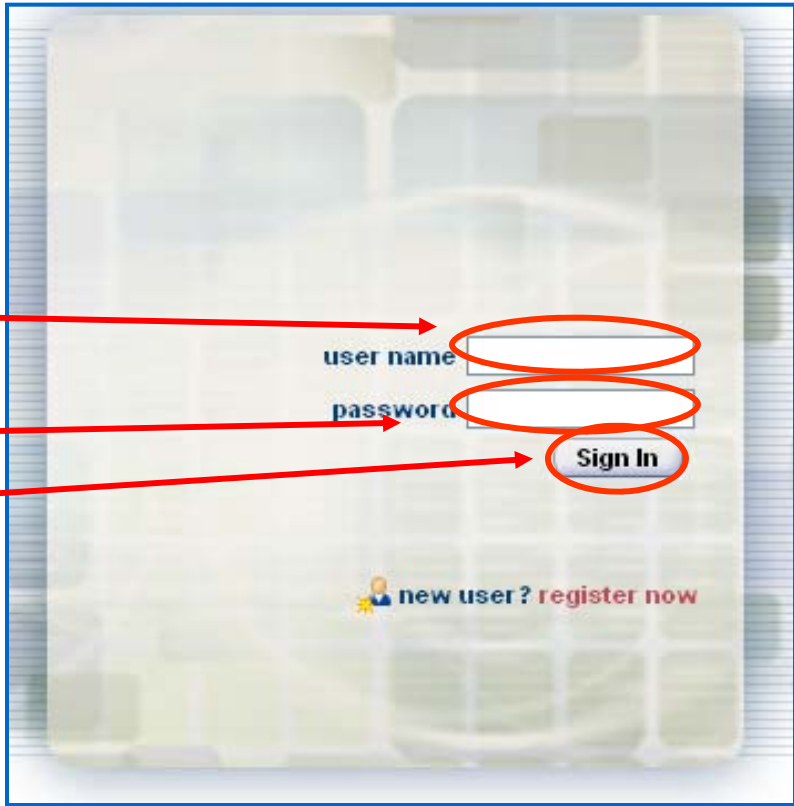
**TYPE YOUR PASSWORD IN THE PASSWORD BOX.**

**CLICK ON SIGN IN TO ENTER THE PROGRAM**

PASSWORD MUST BE 6 CHARACTERS OR MORE WITH NUMBERS, LETTERS OR A COMBINATION OF BOTH.

*IF YOU ARE LOGGING ON FOR THE 1ST TIME, REPEAT YOUR USER NAME AS YOUR PASSWORD AND THEN CLICK THE SIGN ON ICON. ONCE YOU ARE IN THE APPLICATION YOU WILL BE PROMPTED TO CREATE YOUR OWN UNIQUE USER PASSWORD USING THE CRITERIA GIVEN ABOVE.)*

FROM THEN ON, YOU WILL USE YOUR UNIQUE PASSWORD.  
NOTE: DO NOT HAVE WINDOWS SAVE THE PASSWORD.  
COMMIT IT TO MEMORY OR LOG IT SOMEWHERE FOR REFERENCE.



**If you try to log on 3 times with either the wrong user name or password, you will be blocked from the system and then you will need to call the help desk at 387-0708 to get back into the program.**

Your personal homepage will open.

**Choose Work Order Tracking from your favorite applications by clicking your mouse on the word or icon for Work Order Tracking.**

Welcome, DICKERSON LISA

Admin Admin New Template

Quick Insert  
This portlet has not been set up. To set up, select the edit icon in the portlet header.

Bulletin Board (1)  
CAPS ONLY PLEASE 7/12/07 7:39 AM

Favorite Applications

- Create Service Request
- Service Requests
- Work Order Tracking**

Workflow Inbox / Assignments (12)

Result Set  
This portlet has not been set up. To set up, select the edit icon in the portlet header.

Result Set  
This portlet has not been set up. To set up, select the edit icon in the portlet header.

**Type the WO number in the “Find” Box located to the left of the “Select Action” Box just under the blue Maximo Tool and press the enter key. The WO you chose will appear on the screen.**

Work Order Tracking

Find: [ ] Select Action [ ]

List Work Order Plans Related Records Actuals Safety Plan Log Failure Reporting

Advanced Search Save Query Bookmarks

Work Orders Filter 0 - 0 of 0

Work Order	Description	Region	Asset	Status	Scheduled Start	Priority	Location

To find records, use the Filter fields above and then press Enter.  
For more search options, use the Advanced Search button above.  
To enter a new record, select the Insert icon in the toolbar.

Select Records

Example of WO Screen, at this point double check your WO # and the description to make sure you are putting your time on the correct WO.

**Work Order Tracking** | Bulletins: (1) | Go To | Reports | Start Center | Profile | Sign Out

Find: [ ] | Select Action [ ] | Workflow | Reports [ ]

List | **Work Order** | Plans | Related Records | Actuals | Safety Plan | Log | Failure Reporting

Work Order: 52741 | "KITCHEN" THE DRAIN PIPE UNDER THE SINK IS | WORK TYPE: CM

Caused by Vandalism?  | Requester / Location GL: 9150000234 | Status: APPR

MAXIMO LOCATION#: 3140 | ROBERTS AGGIE ES | CCSD Cost Center: [ ] | Status Date: 8/14/07 2:21 PM

CCSD Site #: 0234 | 227 CHARTER OAK HENDERSON 89074 | WBS: [ ] | Inherit Status Changes?:

Asset: [ ] | Failure Class: [ ] | Is Task?:

Region: SE | Problem Code: [ ]

Facility Type: ES

Zone: [ ]

School Schedule: 12

Parent WO: [ ]

Job Details | Asset Details | Priority

Job Plan: [ ] | Asset Up?  | PRIORITY: 3

PM: [ ] | Warranties Exist?  | Priority Justification: [ ]

Safety Plan: [ ]

Scheduling Information | Follow-up Work

Using your mouse, place the cursor over the Actuals tab and click in order to begin the process of putting in your labor for this WO.

**Work Order Tracking** | Bulletins: (1) | Go To | Reports | Start Center | Profile | Sign Out

Find: [ ] | Select Action [ ] | Workflow | Reports [ ]

List | Work Order | Plans | Related Records | **Actuals** | Safety Plan | Log | Failure Reporting

Work Order: 52741 | "KITCHEN" THE DRAIN PIPE UNDER THE SINK IS | WORK TYPE: CM

Caused by Vandalism?  | Requester / Location GL: 9150000234 | Status: APPR

MAXIMO LOCATION#: 3140 | ROBERTS AGGIE ES | CCSD Cost Center: [ ] | Status Date: 8/14/07 2:21 PM

CCSD Site #: 0234 | 227 CHARTER OAK HENDERSON 89074 | WBS: [ ] | Inherit Status Changes?:

Asset: [ ] | Failure Class: [ ] | Is Task?:

Region: SE | Problem Code: [ ]

Under the Labor Tab at the lower right hand corner of the screen, you will find a “New Row” button. Click on this button to open a blank Actuals Log to be filled in with your information.

The screenshot shows the 'Work Order Tracking' application interface. At the top, there is a navigation bar with 'Buletins: (1)', 'Go To', 'Reports', 'Start Center', 'Profile', 'Sign Out', and 'Help'. Below this is a search bar and a 'Select Action' dropdown. The main menu includes 'List', 'Work Order', 'Plans', 'Related Records', 'Actuals', 'Safety Plan', 'Log', and 'Failure Reporting'. The 'Actuals' tab is active, showing details for Work Order 52741, titled '"KITCHEN" THE DRAIN PIPE UNDER THE SINK IS', at Site MAINT, with Status APPR. Below this are sections for 'Children of Work Order 52741' and 'Tasks for Work Order 52741', both showing '...No rows to display...'. The 'Labor' tab is selected and highlighted with a red circle. The Labor section shows a table with columns: Task, Labor, Name, Approved?, Start Date, Start Time, End Time, Regular Hours, and Rate. The table is currently empty, showing '...No rows to display...'. At the bottom right of the Labor section, there is a 'New Row' button, also circled in red. A red arrow points from this button to the 'New Row' button in the top right corner of the Labor section.

Example of Actuals Log screen that appears in order to input Labor

The screenshot shows the 'Actuals Log' screen for Labor input. The 'Labor' tab is selected. The main form has the following fields: Task, Labor, Name, Approved?, Start Date (8/17/07), Start Time, End Time, Regular Hours (0:00), and Rate. Below this is a 'Labor' section with fields for Task, Labor, and Approved?. The 'Details' section includes: Truck # for Trip Charge, Craft, Start Date (8/17/07), End Date, Start Time, End Time, Regular Hours (0:00), Line Cost (0.00), and Type (WORK). The 'Outside Labor' section includes: Outside?, Vendor, Contract, and Revision. The 'Premium Pay' section includes: Premium Pay Code, Premium Pay Hours, Premium Pay Rate, Premium Rate Type, and OT Justification. The 'Charge Information' section includes: GL Debit Account (915000234), GL Credit Account, Location (3140), Asset, Memo, and Recorded as Received. At the bottom right, there are buttons for 'Select Labor', 'Select Planned Labor', and 'New Row'.

## ENTERING LABOR (ACTUAL TIME WORKED)

Fill in the "Labor" box with the correct Labor Code for the worker that did the work.

Fill in the "Craft" box with the correct craft code, if it does not automatically populate once your labor code is entered.

Fill in the "Start Date" box with the correct date or choose from the calendar by clicking on the gray calendar button to the right of the box. From the calendar, select the correct date and enter.

Fill in the "End Date" using the same instructions as the "Start Date".

**NOTE: Start Date and End Date will always be the same, and must be entered or selected for calendar.**

Fill in "Start Time" box. Example 11:00 am or 2:15 pm. The program will automatically default to AM if you are making an AM entry. If you are entering a PM time, you will need to designate PM. If you are accustomed to and like to use military time, the computer will automatically fill in the PM based on a military entry. Example: 13:00 will automatically change to 1:00 PM when you tab or enter after your entry. Actual time worked on the job. DO NOT COUNT TRAVEL TIME OR LUNCH OR BREAKS.

Example: Arrived @ 8:30am, finished the job at 1:30pm. Sometime during the job took 15 minute break and a 30 minute lunch. Actual time should reflect only actual time worked. Start time 8:30am, End time 12:45pm. Total 4:15 hours actual time for this WO.

Fill in the "End Time" box using the same directions as used for the "Start Time" above. Tab or Enter to see hours.

Your regular hours will automatically calculate based on your other entries.

The screenshot shows a software interface for entering labor. At the top, there are tabs for "Labor", "Materials", "Services", and "Tools". Below this is a header area with a "Filter" button and a "Download" button. The main data entry area includes fields for "Task", "Labor" (with value 314627), "Name" (POWELL RICHARD), "Approved?" (checked), "Start Date" (8/16/07), "Start Time" (9:00 AM), "End Time" (1:00 PM), "Regular Hours" (4:00), and "Rate" (23.59). Below this is a "Details" section with fields for "Truck # for Trip Charge", "Cran" (14), "Start Date" (8/16/07), "End Date" (8/16/07), "Start Time" (9:00 AM), "End Time" (1:00 PM), "Regular Hours" (4:00), "Rate" (23.59), "Type" (WORK), and "Timer Status". A "Charge Information" section at the bottom right includes "GL Debit Account" (9310000951), "GL Credit Account", "Location" (1005), "Asset", "Memo", and "Recorded as Received". A red box highlights the "Cran" field with the text "CONFIRM THIS FIELD IS FILLED". Another red box highlights the "End Time" field with the text "NOTE: COMPUTER WILL AUTOMATICALLY CALCULATE AND FILL THIS FIELD IF ENTRY WAS MADE CORRECTLY." Red arrows point from the text instructions to the corresponding fields in the interface.

Task	Labor	Name	Approved?	Start Date	Start Time	End Time	Regular Hours	Rate
	314627	POWELL RICHARD	✓	8/16/07	9:00 AM	1:00 PM	4:00	23.59

Truck # for Trip Charge	Cran	Start Date	End Date	Start Time	End Time	Regular Hours	Rate	Type	Timer Status
	14	8/16/07	8/16/07	9:00 AM	1:00 PM	4:00	23.59	WORK	

GL Debit Account	GL Credit Account	Location	Asset	Memo	Recorded as Received
9310000951		1005			

Example of correctly filled in Actual Row. If you put all information in correctly, the regular hours box should reflect the number of hours worked and there will be a calculated amount in the "Line Cost". (Rate should now reflect your correct hourly rate of pay.)

The screenshot shows a Maximo Labor entry form for task 314627, worker POWELL RICHARD, on 8/14/07. The start time is 9:00 AM and the end time is 1:00 PM. The regular hours are 4:00, and the rate is 23.59. The line cost is calculated as 94.36. A note indicates that the computer will automatically calculate and fill the regular hours field if the entry is correct.

Be sure to click on the save icon on the Maximo Toolbar to save the entry you just made.

If you are entering Actuals for more than one worker, repeat all the steps on pages 3-6 for each.

**IMPORTANT:** If you put time on a WO, but still need to return to finish, change the WO to "IN PROGRESS" once you enter your actuals the first time. That will advise others who view the WO that it is "In

The screenshot shows the Maximo Work Order Tracking interface for work order 52741. The work order description is "KITCHEN" THE DRAIN PIPE UNDER THE SINK IS, and the site is MAINT. The status is APPR. The toolbar shows the 'Save' icon circled in red. The interface includes tabs for List, Work Order, Plans, Related Records, Actuals, Safety Plan, Log, and Failure Reporting.

## ENTERING A TRIP CHARGE

In order to put in a TRIP CHARGE, you will need to be on the "Labor" tab and select the "New Row" button to open another blank labor row.

Fill in the "Labor" box with the word "TRIP" and enter key.

Fill in the "Truck # for Trip Charge" box with truck used for this WO.

Fill in the "Start Date" box and the "End Date" box with correct date, (should match the date of the other labor entered). Pick from calendar for more accuracy.

Fill in the "Regular Hours" box with a "1" and then hit the tab key or select the enter key.

This should produce a line cost of \$35.00 for this entry.

**NOTE: IF MULTIPLE VEHICLES RESPONDED, THERE SHOULD BE ONE TRIP CHARGE PER TRUCK. THERE WILL NEED TO BE A NEW ROW FOR EACH VEHICLE, BECAUSE THERE IS ONLY ROOM FOR ONE TRUCK # IN THE FIELD. TWO TRUCKS WOULD REQUIRE TWO LABOR ROWS TO RECORD THE TRIP CHARGES.**

**Labor** Materials Services Tools

Labor Filter 1 - 2 of 2 Download ?

Task	Labor	Name	Approved?	Start Date	Start Time	End Time	Regular Hours	Rate
	314627	POWELL RICHARD	<input checked="" type="checkbox"/>	8/16/07	9:00 AM	1:00 PM	4:00	23.59
	TRIP	TRIP CHARGE	<input type="checkbox"/>	8/16/07			1:00	35.00

**Labor**

Task Labor \* TRIP TRIP CHARGE Approved?

**Details**

Truck # for Trip Charge 3228 Start Date \* 8/16/07 End Date \* 8/16/07 Type \* WORK

Craft \* TRIP Start Time End Time \*

Regular Hours \* 1:00 Line Cost 35.00

Rate \* 35.00

Timer Status

**NOTE: COMPUTER WILL AUTOMATICALLY CALCULATE AND FILL THIS FIELD IF ENTRY WAS MADE CORRECTLY.**

Outside Labor Premium Pay Charge Information

## ENTERING OVERTIME LABOR

Go to the "Labor" Tab and click on "New Row" in the lower right hand corner of the screen.

Fill in the "Labor" field and then tab or enter, application will populate other boxes with the necessary labor information.

\*\*\* (Confirm "Craft" field, computer will normally auto fill this field. If it does not, you will need to put in your correct craft code.)

Choose a "Start Date" from the calendar or type the correct date.

Choose an "End Date" from the calendar or type in the correct date. (Start and end date are always the same.)

Below the Premium Pay column at the middle of the page near the bottom, fill in the "Premium Pay Code" Field. If unsure of code, choose by clicking on the magnifying glass to the right of the field and pick from the drop down menu.

Go down to the very last field under Premium Pay and fill in "OT Justification" field. If unsure of code, choose justification by clicking on the magnifying glass to the right of the field.

Go back up to the "Premium Pay Hours" field and enter the number of hours worked. If you need to use half and quarter hour increments, the following are examples: .25 for 15 minutes, .5 for 30 minutes, .75 for 45 minutes. Confirm that the program populated the "Line Cost" field before saving the entry.

Save Entry by clicking on the Save Icon on the Maximo Toolbar.

The screenshot shows the Maximo Labor entry form with several fields highlighted in red circles and callouts. The "Labor" tab is selected at the top. The form displays a table with one row of labor data: Task (314627), Name (POWELL RICHARD), Approved? (checked), Start Date (8/16/07), Start Time, End Time, Regular Hours (0:00), and Rate (23.59). Below the table, the "Labor" section shows Task (314627), Name (POWELL RICHARD), and Approved? (checked). The "Details" section includes Truck # for Trip Charge, Craft (14), Start Date (8/16/07), Start Time, Regular Hours (0:00), Rate (23.59), End Date (8/16/07), End Time, Type (WORK), and Timer Status. A callout box on the left says "Confirm" with three asterisks. The "Premium Pay" section includes Premium Pay Code (OT1), Premium Pay Hours (3:00), Premium Pay Rate (1.50), Premium Rate Type (MULTIPLIER), and OT Justification (2). A callout box on the right says "Confirm there is a line cost after your entry is complete, before your save" with an arrow pointing to the Line Cost field (106.16). The "Charge Information" section includes GL Debit Account (9310000951), GL Credit Account, Location (1005), Asset, Memo, and Recorded as Received. At the bottom right, the "New Row" button is highlighted in a red circle. A callout box on the left says "Must be entered in proper order: 1. Pay Code, 2. OT Justification, 3. Pay Hours".



## ENTERING MATERIALS

To enter Materials, select the Materials Tab (next to the Labor Tab) and select the new row button in the lower right hand corner of the screen.

You will get a new Materials screen that appears to enter your material information.

Materials | Filter > [Icons] | 0 - 0 of 0 | Download ? [Icons]

Task	Item	Description	Transaction Type	Storeroom	Quantity	Bin
...No rows to display...						

Select Materials | Select Reserved Items | Select Asset Spare Parts | **New Row**

Fill in "Line Type" by using drop down menu (blue arrow at the right of the box) and select "Material".

Fill in "Description" box with description of part used. Refer to the "Entering Materials in Maximo Quick Steps" form for procedures for the different types of entries, i.e. Credit Card, Shop Stock, and Purchase Requisitions.

If you have extra information that is important, you can enter it into the long description box to the right of the "Description" Box.

Fill in "Quantity" - Numeric only.....1. 3. 10. or fractions of a whole such as .5 .25 .75

Fill in "Unit Cost". Total cost per unit or if you know the per foot price, etc, you can just put the exact amount used. Press enter key.

Maximo will calculate partial usage of a whole quantity.

(Example: 5 GAL. WHITE SEMI GLOSS PAINT in description, .5 in quantity, \$60.00 in unit cost will calculate material price @ \$30.00.)

Refer to Sample Packet for "Materials Entry" (see trainers) for correct way to enter shop stock, CC purchases and PO purchases.

Materials | Filter > [Icons] | 1 - 1 of 1 | Download ? [Icons]

Task	Item	Description	Transaction Type	Storeroom	Quantity	Bin
		NEW DRAIN KIT WITH GASKETS	ISSUE		1.00	

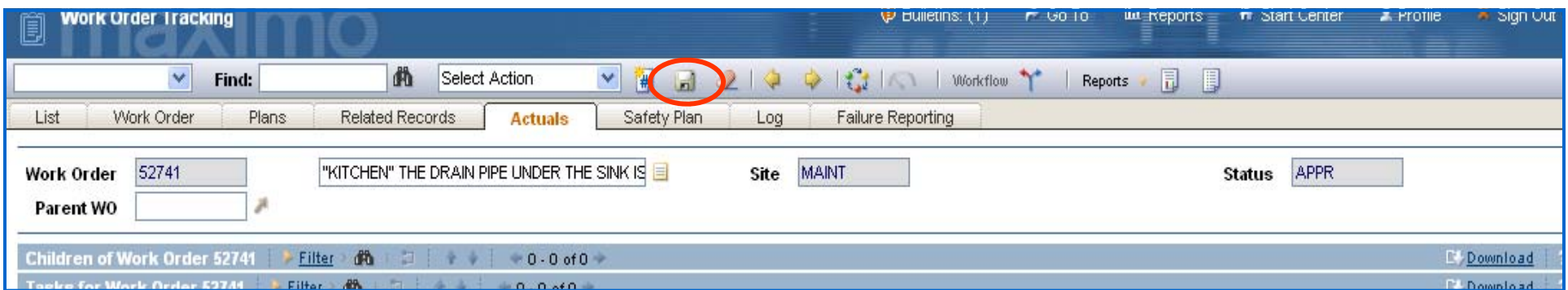
**Details**

Task [Field]  
Line Type \* MATERIAL [Dropdown] ←  
Item [Field] ← NEW DRAIN KIT WITH GASKETS [Field] ←  
Storeroom [Field]  
Site \* MAINT [Field]  
Quantity [Field] 1.00 ←  
Unit Cost \* [Field] 20.00 ←  
Credit Card Used? [Checkbox]  
Credit Card Number [Field]  
Line Cost [Field] 20.00 ←  
Bin [Field]

Lot [Field]  
Expiration Date [Field]  
Lot Type [Field]  
Condition Code [Field]  
Rate Percentage [Field] 100  
Condition Enabled? [Checkbox]  
Stock Category [Field]  
Entered By \* MLDICKERSON  
Actual Date \* 8/17/07 9:55 AM

**NOTE: COMPUTER WILL AUTOMATICALLY CALCULATE AND FILL THIS FIELD IF ENTRY WAS MADE CORRECTLY.**

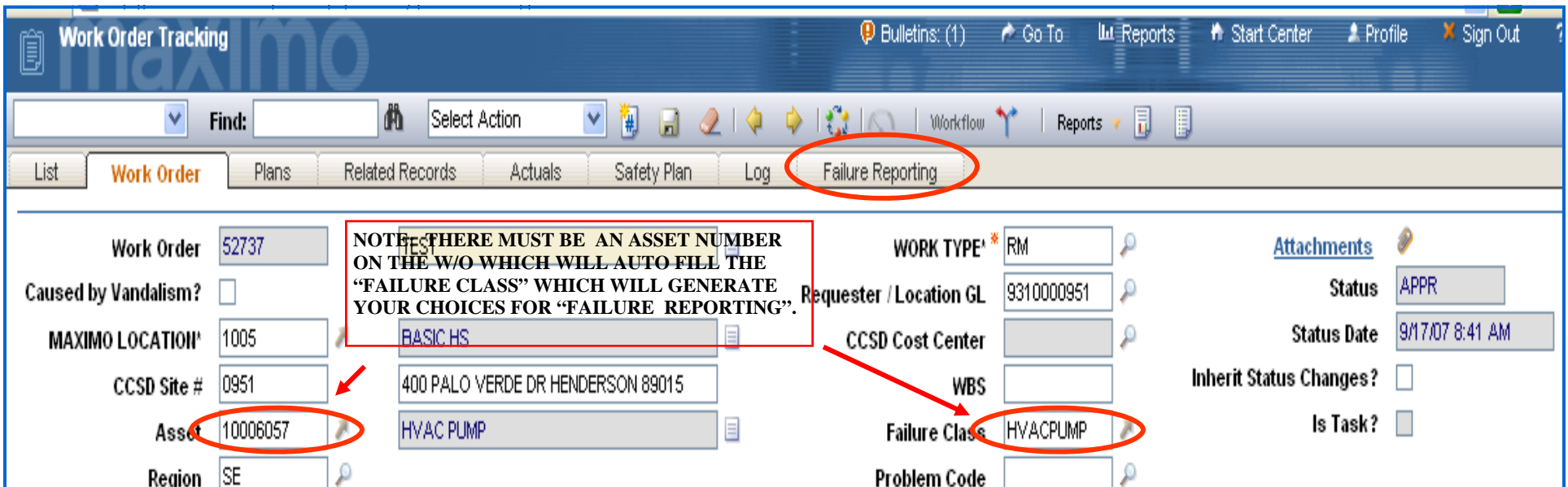
Be sure to click on the save icon on the Maximo Toolbar to save the entry you just made.



## FAILURE CODES

**NOTE: Not all crafts utilize "Failure Reporting" feature on Maximo. The "Asset" number will determine the "Failure Class" which will prompt the "Failure Code" choices for that particular asset. There must be an asset number if "Failure Reporting" is required.**

To report failure codes click on the "Failure Reporting" tab to record the failure, cause and remedy codes.



Click on “Select Failure Code” at the lower right corner of your screen to open first selection window.

The screenshot shows the 'Work Order Tracking' application interface. At the top, there are navigation tabs: List, Work Order, Plans, Related Records, Actuals, Safety Plan, Log, and Failure Reporting (which is active). Below the tabs, there are input fields for 'Work Order' (52737), 'TEST', 'Site' (MAINT), and 'Status' (APPR). The 'Failure Details' section includes 'Failure Class' (HVACPUMP) and 'COOF'. Below this is a table for 'Failure Codes' with columns for Type, Failure Code, and Description. The table is currently empty, displaying the message "...No rows to display...". In the bottom right corner of the interface, a button labeled "Select Failure Codes" is circled in red, with a red arrow pointing to it from the left.

A window will open with “Failure Code Problem” choices. Click on the underlined choice from the list and click on select button (Lower Right) for next selection box to open.

This screenshot shows the same software interface as the previous one, but with a 'Select Failure Codes' dialog box open in the foreground. The dialog box has a title bar and a close button. It contains a table with columns for 'Failure Code', 'Type', and 'Description'. The first row, 'LEAKAGE', is circled in red. Below the table, there are three buttons: 'Select', 'Select and Return', and 'Close'. The 'Select' button is also circled in red, with a red arrow pointing to it from the left. The background interface is partially visible, showing the 'Failure Reporting' section with the 'Failure Codes' table.

Failure Code	Type	Description
<u>LEAKAGE</u>	PROBLEM	LEAKAGE
<u>NOISY</u>	PROBLEM	NOISY
<u>NOSTART</u>	PROBLEM	UNIT NOT RUNNING
<u>NOPRESSR</u>	PROBLEM	NO PRESSURE
<u>NO POWER</u>	PROBLEM	NO POWER
<u>EVAPCOOL</u>	PROBLEM	EVAPORATIVE COOLER

“Failure Code Cause” Window will open. Click on underlined choice in first column and click on Select button for next screen to appear

Work Order Tracking

Find: [ ] Select Action [ ]

List Work Order Plans Related Records Actuals Safety Plan Log Failure Reporting

Work Order 52737 TEST Site MAINT Status APPR

Select Failure Codes

Failure Code	Type	Description
<u>WORH PAR</u>	CAUSE	WORN PART
<u>MISPART</u>	CAUSE	MISALIGNED PART
<u>NO FLOW</u>	CAUSE	NO FLOW
<u>VANDALSM</u>	CAUSE	BLOCKAGE

Select Select and Return Close

“Failure Code Remedy” Window will open. Click on underlined choice in first column and click on Select button.

Work Order Tracking

Find: [ ] Select Action [ ]

List Work Order Plans Related Records Actuals Safety Plan Log Failure Reporting

Work Order 52737 TEST Site MAINT Status APPR

Select Failure Codes

Failure Code	Type	Description
<u>REPLACE</u>	REMEDY	REPLACE PART
<u>REFURBIS</u>	REMEDY	TURNED ON.

Select Select and Return Close

Window will close and your choices will appear. See example screen below.

Work Order Tracking

Bulletins: (1) Go To Reports Start Center Profile Sign Out Help

Find: [ ] Select Action [ ]

List Work Order Plans Related Records Actuals Safety Plan Log Failure Reporting

Work Order: 52737 TEST Site: MAINT Status: APPR

Failure Details

Failure Class: HVACPUMP COOF Remarks: [ ] Remark Date: [ ]

Failure Codes

Type	Failure Code	Description
PROBLEM	NOISY	NOISY
CAUSE	WORN PAR	WORN PART
REMEDY	REPLACE	REPLACE PART

Select Failure Codes

If you responded on a W/O and determined upon arrival that the work was already done and the WO is a duplicate. In order to complete, you must remove the "Asset" number and "Failure Class" on the main W/O page in order to complete without having to do "Failure Reporting". Place cursor in "Asset" field and highlight contents and hit delete key. Repeat in the "Failure Class" field. Make sure you put a notation in the short description field: See below

Work Order Tracking

Bulletins: (1) Go To Reports Start Center Profile Sign Out Help

Find: [ ] Select Action [ ]

List Work Order Plans Related Records Actuals Safety Plan Log Failure Reporting

Work Order: 52737 DUP W/O-REFER TO W/O 52535 TEST TEST

Caused by Vandalism?

MAXIMO LOCATION: 1005 BASIC HS

CCSD Site #: 0951 400 PALO VERDE DR HENDERSON 89015

Asset: [ ]

Region: SE

Facility Type: HS

WORK TYPE: \* RM

Requester / Location GL: 9310000951

CCSD Cost Center: [ ]

WBS: [ ]

Failure Class: [ ]

Problem Code: NOISY

Attachments

Status: APPR

Status Date: 9/17/07 8:41 AM

Inherit Status Changes?

Is Task?

## STATUS CHANGES

Once you have completed all the entries outlined in this training. The status will need to be changed if the work order is ready to be completed.

When determining which status you want, consider the following:

If you have completed the WO and nothing further needs to be added, change the status to 'COMPLETE'.

If your supervisor is going to need to craft it and send to another craft for some reason, change to 'IN PROGRESS'.

If you are going to put more time against the WO (maybe a week long job) change the status to 'IN PROGRESS' after you have put your first day's actuals on it. **NOTE:** If you are waiting on materials or have other status info, please put notes in the long description to be viewed by others, such as dispatch, FSR's, etc.

If you have a need to create a follow up to a different craft, please see trainers for "How to Create A Follow-Up WO".

When in doubt on a status, check with dispatch or trainers for assistance.

Click on the "Status Change" icon on the Maximo Tool Bar.

The screenshot shows the Maximo Work Order Tracking interface. The top navigation bar includes 'Work Order Tracking', 'Bullets: (1)', 'Go To', 'Reports', 'Start Center', 'Profile', and 'Sign Out'. Below this is a tool bar with a search field, a 'Select Action' dropdown, and several icons. The 'Status Change' icon, represented by a circular arrow, is circled in red with a red arrow pointing to it. Below the tool bar are tabs for 'List', 'Work Order', 'Plans', 'Related Records', 'Actuals', 'Safety Plan', 'Log', and 'Failure Reporting'. The main content area displays the details for Work Order 52741. The title is '"KITCHEN" THE DRAIN PIPE UNDER THE SINK IS'. The status is 'APPR' and the status date is '8/14/07 2:21 PM'. Other fields include 'MAXIMO LOCATION' (3140), 'CCSD Site #' (0234), 'Region' (SE), 'Facility Type' (ES), 'Requester / Location GL' (9150000234), and 'WORK TYPE' (CM).

Work Order	52741	"KITCHEN" THE DRAIN PIPE UNDER THE SINK IS	WORK TYPE*	CM	Attachments	
Caused by Vandalism?	<input type="checkbox"/>		Requester / Location GL	9150000234	Status	APPR
MAXIMO LOCATION*	3140	ROBERTS AGGIE ES	CCSD Cost Center		Status Date	8/14/07 2:21 PM
CCSD Site #	0234	227 CHARTER OAK HENDERSON 89074	WBS		Inherit Status Changes?	<input type="checkbox"/>
Asset			Failure Class		Is Task?	<input type="checkbox"/>
Region	SE		Problem Code			
Facility Type	ES					

When “Change Status” window opens, click on the blue arrow next to the “New Status” box and a drop down window will appear. Select your status choice and then choose “OK” button at the bottom of the “Status Change” window.

The screenshot shows the Maximo Work Order Tracking interface. A 'Change Status' dialog box is open, allowing the user to change the status of work order 52741. The current status is 'APPR' (Approved). The 'New Status' dropdown menu is open, showing several options. The 'Completed' option is highlighted with a red circle. Red arrows point to the dropdown arrow, the 'Completed' option, and the 'OK' button at the bottom of the dialog box.

**RESOLVED SCREEN APPEARS  
IMPORTANT NOTE....PLEASE READ!!!!**

When completing a WO, you will see this box appear on the screen. The ticket number is just the Service Request that the site put in originally, so when you Complete a WO, Maximo automatically “Resolves” the original Service Request so that the school can receive notification.

The ticket # is different from the WO #. Do not let this message alarm you. It is normal and might be seen each time you Complete a WO.

The screenshot shows a notification message box in the Maximo interface. The message reads: "Ticket 43083 status changed to RESOLVED. Status change(s) completed successfully." The message box has a "Close" button at the bottom right.

**This training explains the basic procedure for a shop technician to complete his part of a WO. If there are still questions, contact the Help Desk at 387-0708 or make contact with the Work Management Trainers or dispatch.**

**Be sure to properly log your Materials, refer to the training documentation for entering materials, if further information is necessary. See trainers for other documents to cover these topics.**

**\*\*\*\*\*IMPORTANT\*\*\*\*\*PLEASE NOTE\*\*\*\*\***

***Again, all employees should change the status of the WO to “In Progress” once any time has been added to the WO. This will enable everyone else, including maintenance dispatch to see if someone has already responded when they get inquiry phone calls.***

**SHOP TECHNICIANS SHOULD ADD NOTATIONS TO THE LONG DESCRIPTION AS NEEDED.**

**EXAMPLES OF SUCH ARE: NO TRIP CHARGE, NO MATERIALS NEEDED (NMU), PARTIALLY REPAIRED ON 8/7/07-WAITING ON PART TO COMPLETE. THESE NOTATIONS WILL ASSIST OTHERS SUCH AS DISPATCH, COORDINATORS, PRICING CLERKS WHEN THEY**