

CREATING A FOLLOW UP WORK ORDER

1. Go to the originating Work Order
2. Select Action
3. Scroll to Create
4. Click on Work Order

Work Order Tracking

Find: [] Select Action []

Workflow Change Status

Apply SLAs View SLAs

Select/Deselect SLAs

Create View

Remove Work Plan Select Safety Hazards Remove Safety Plan Apply Route Enter Meter Readings Report Downtime Assign to New Parent Move/Modify Assets Modify/Delete Work Log Edit History Work Order Select Owner Take Ownership Attachment Library/Folders Duplicate Work Order Delete Work Order Add to Bookmarks Run Reports

WORK TYPE: CM

Center: WBS

Priority: 3

Asset Up? ☐ Warranties Exist? ☐ Priority Justification: []

Follow-up Work

Originating Record: 3301

Originating Record Class: SR

Has Follow-up Work? ☒

5. NOTE: NEW WORK ORDER NUMBER
6. Change the description
7. Change Work Type if needed

 and 'Warranties Exist?' as ☐. The 'Priority' is set to 3. The 'Originating Record' is 3301. The 'Originating Record Class' is SR. The 'Has Follow-up Work?' checkbox is checked."/>

Work Order Tracking

Find: [] Select Action []

Workflow Change Status

Apply SLAs View SLAs

Select/Deselect SLAs

Create View

Remove Work Plan Select Safety Hazards Remove Safety Plan Apply Route Enter Meter Readings Report Downtime Assign to New Parent Move/Modify Assets Modify/Delete Work Log Edit History Work Order Select Owner Take Ownership Attachment Library/Folders Duplicate Work Order Delete Work Order Add to Bookmarks Run Reports

WORK TYPE: CM

Requester / Location GL: 9150000422

CCSD Cost Center: WBS

Failure Class: []

Problem Code: []

Job Details

Job Plan: [] PM: [] Safety Plan: []

Asset Details

Asset Up? ☐ Warranties Exist? ☐ Priority: 3

Originating Record: 3301

Originating Record Class: SR

Has Follow-up Work? ☒

This produces a follow up check in the old work order as follows:

 and 'Warranties Exist?' as ☐. The 'Priority' is set to 3. The 'Originating Record' is 33012. The 'Originating Record Class' is SR. The 'Has Follow-up Work?' checkbox is checked."/>

Work Order Tracking

Find: [] Select Action []

Workflow Change Status

Apply SLAs View SLAs

Select/Deselect SLAs

Create View

Remove Work Plan Select Safety Hazards Remove Safety Plan Apply Route Enter Meter Readings Report Downtime Assign to New Parent Move/Modify Assets Modify/Delete Work Log Edit History Work Order Select Owner Take Ownership Attachment Library/Folders Duplicate Work Order Delete Work Order Add to Bookmarks Run Reports

WORK TYPE: CM

Requester / Location GL: 9150000422

CCSD Cost Center: WBS

Failure Class: []

Problem Code: []

Job Details

Job Plan: [] PM: [] Safety Plan: []

Asset Details

Asset Up? ☐ Warranties Exist? ☐ Priority: 3

Originating Record: 33012

Originating Record Class: SR

Has Follow-up Work? ☒

Follow-up Work

Target Start: 1/18/07 9:58 AM Target Finish: 2/17/07 9:58 AM Scheduled Start: [] Scheduled Finish: []

Actual Start: [] Actual Finish: [] Duration: 0:00 Time Remaining: []

Note:

8. Change Supervisor

Follow-up Work

Start

Finish

Duration* 0:00

Timing

Supervisor* MCPHAM

Owner Group* EMS

Service Group HVAC

8. click on arrow

9. Change Owner Group by going to Select Action and Select Owner

Work Order 40143

Caused by Vandalism? ☐

MAXIMO LOCATION# 3060

CCSD Site # 0422

Asset

Region SE

Facility Type ES

Zone

School Schedule 9

Parent WO

Job Details

Job Plan

PM

Safety Plan

Scheduling Information

Target Start 2/1/07 10:49 AM

Target Finish

Scheduled Start

Scheduled Finish

Responsibility

Reported By WFCOLLETTE

Reported Date 2/1/07 10:49 AM

Workflow

- Change Status
- Apply SLAs
- View SLAs
- Select/Deselect SLAs
- Create
- View
- Create Job Plan from Work Plan
- Remove Work Plan
- Select Safety Hazards
- Remove Safety Plan
- Apply Route
- Enter Meter Readings
- Report Downtime
- Assign to New Parent
- Move/Modify Assets
- Modify/Delete Work Log
- 9. Select Owner
- Take Ownership
- Attachment Library/Folders
- Duplicate Work Order
- Delete Work Order
- Add to Bookmarks
- Run Reports

WORK TYPE*

Requester / Location GL

CCSD Cost Center

WBS

Failure Class

Problem Code

Asset Up? ☐

Warranties Exist? ☐

Follow-up Work

Supervisor* GWSMITH

Owner Group* EMS

10. Select a Person Group

Select Action

Select Owner

Person

Person Groups

Person Groups Filter > 1 - 3 of 3 Download ?

Person Group Description

10. ELEC-SUP Electrical Supervisor

HELDISK HELDISK

TELEDISP Telecom Dispatch

Cancel

Asset Up? ☐

Warranties Exist? ☐

PRIORITY*

Priority Justification

Follow-up Work

Now it looks like this:

SUPERVISOR* GWSMITH
OWNER GROUP* ELEC-SUP
Service Group HVAC

11. Enter new Priority number if needed

Priority

PRIORITY* 3

Priority Justification

12. Plan the Craft for the Work Order – 3 STEPS

1. Click on the plans tab
 - A. While on the labor tab, click on New Row on the lower right side of the page
 - B. Put the craft # in the craft box or choose from list of crafts by choosing from drop down menu
 - C. Put at least 1 hour in the regular hours box

Work Order Tracking

Go To List Reports Start Center Profile Sign Out ? Help

Select Action Workflow Reports

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

Work Order 40143 CHECK POWER OUTLET FOR HEAT UNIT Site MAINT Status WAPPR

Parent WO

Children of Work Order 40143 Filter 0 - 0 of 0 Download ?

Tasks for Work Order 40143 Filter 0 - 0 of 0 Download ?

Sequence	Task	Summary	Estimated Duration	Status
...No rows to display...				

New Row

Labor Materials Services Tools

Labor Filter 1 - 1 of 1 Download ?

Task	Craft	Skill Level	Vendor	Quantity	Regular Hours	Rate	Line Cost
	16				1:00	23.42	23.42

Details

12B. 16

Task

Skill Level

Vendor

Labor Contract

Regular Hours* 1:00

Rate 23.42

Line Cost 23.42

Rate Changed ?

Select Craft 12A. New Row

13. Change status to Approved – 3 STEPS

Go To Reports Start Center

Select Action

Plans Related Records Actuals Safety Plan Log Failure Reporting

Change Status

Work Order: 40143
Status: WAPPR
CHECK POWER OUTLET FOR HEAT UNIT
Waiting on Approval

New Status: Approved
Status Date:
Memo:
Print Work Order(s)?

OK Cancel

Vendor:
Labor Contract:
Regular Hours: 1:
Rate: 23.42

14. Save

Work Order Tracking

Find: Select Action

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

Work Order: 40120
FIX HEAT ROOM 45 AC/HEATING UNIT #5
WORK TYPE: CM
Requester / Location GL: 9150000422
Attachments:
Status:
Status Date: 1/
Inherit Status Changes?:
Is Task?:

MAXIMO LOCATION: 3060
CCSD Site #: 0422
Asset:
Region: SE
Facility Type: ES
Zone:
School Schedule: 9
Parent WO:
GIBSON JAMES ES
271 LEISURE CIR HENDERSON 89074
CCSD Cost Center:
WBS:
Failure Class:
Problem Code:
Asset Up?:
Warranties Exist?:
Priority: 3
Priority Justification:
Job Plan:
PM:
Safety Plan:
Scheduling Information:
Target Start: 1/18/07 9:58 AM
Target Finish: 2/17/07 9:58 AM
Scheduled Start:
Scheduled Finish:
Actual Start:
Actual Finish:
Duration: 0:00
Time Remaining:
Follow-up Work:
Originating Record: 33012
Originating Record Class: SR
Has Follow-up Work?: ☒

15. DO NOT WORK FLOW IF YOU WORK IN THE MAINTENANCE DEPARTMENT.