

Maximo Quick Reporting

WORK ORDER TASKS

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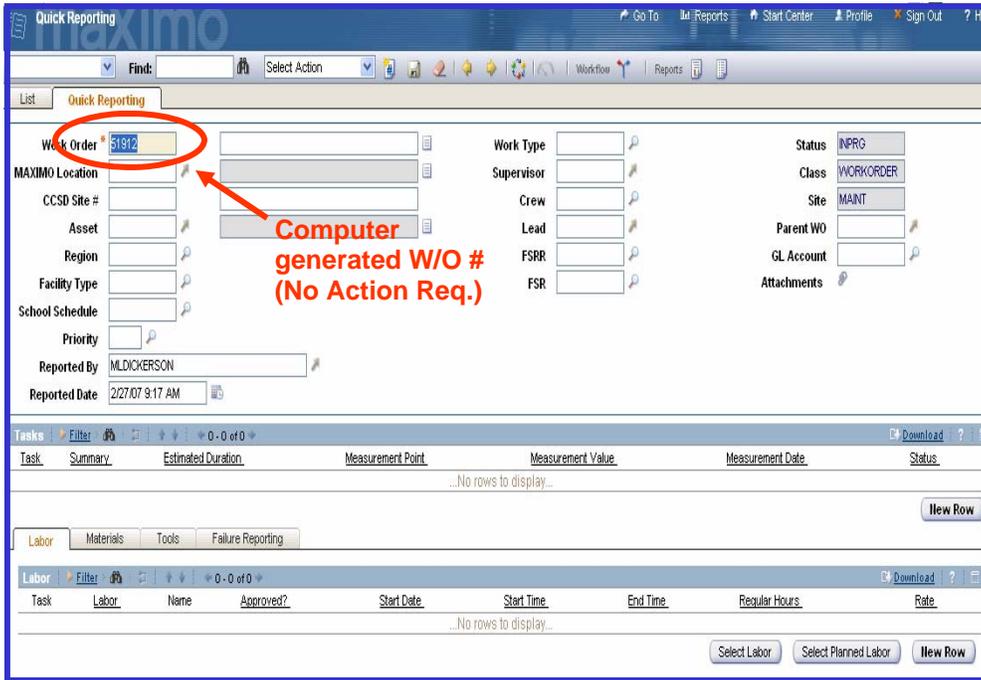
WORK ORDER CREATION THROUGH QUICK REPORTING

To create a Work Order for work you have already done or are about to do, use the **Quick Reporting Application**.

- 1) Go To
- 2) Work Orders
- 3) Quick Reporting

The screenshot shows the Maximo Assets page. The 'Go To' menu is open, showing a list of applications. The 'Work Orders' application is circled in red, with a red arrow labeled '2.' pointing to it. The 'Quick Reporting' option under 'Work Orders' is also circled in red, with a red arrow labeled '3.' pointing to it. The 'Go To' menu itself is circled in red, with a red arrow labeled '1.' pointing to it. The main content area shows asset details for 'WATER HEATER' with a classification of 'WTRHTR'. A table of specifications is visible below, with the 'MODEL' row highlighted.

Attribute	Description	Data Type	Alphanumeric
MODEL	MODEL NUMBER	ALN	GCV40 100
SERIAL	SERIAL NUMBER	ALN	9211681003
SIZE	UNIT SIZE/CAPACITY	ALN	38 GAL
UNITYTYPE	UNIT TYPE	ALN	GAS
LOC_DESC	LOCATION DESCRIPTION (ROOM, BLDG)...	ALN	600'S ACR FF
MANUF	MANUFACTURER	ALN	A O SMITH



This screen will generate a Quick Work Order that enables you to report your labor and other information on work performed in a 1 step process.

The WO # generated can be accessed anytime through WO Tracking to add additional information such as materials, if needed.

An example of a new Work Order created from a QUICK REPORT is shown below.

4) In the description box, type the description of the work to be done. Begin with **CALL OUT** (if applicable) and then add department, *i.e. zone, plumbing, etc.* Then add summary and details in long description as needed.

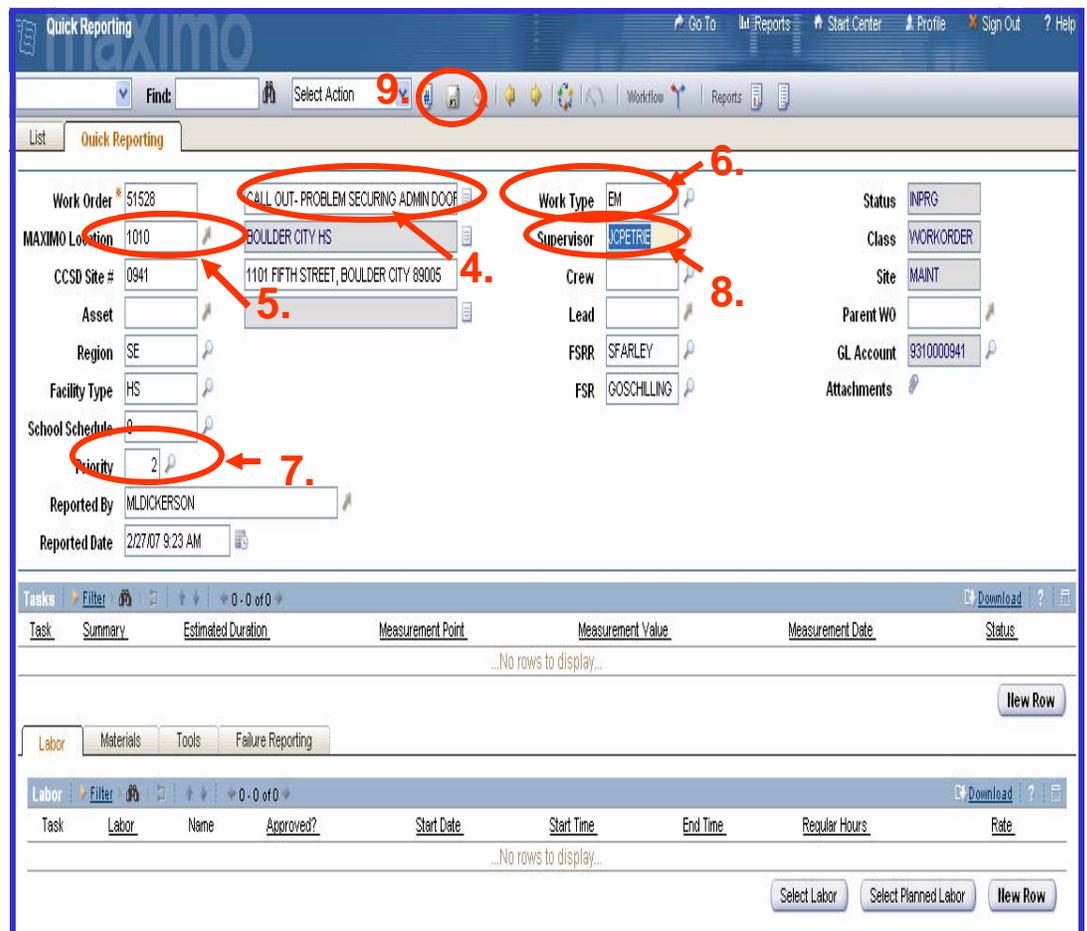
5) Type the Maximo location number or use *the Detail Menu and Look Up Value* to select the 4 digit Maximo Location code number. ****See Pages 5-7 for Instructions on how to select Maximo Location Codes.****

6) Enter Work Type (EM, CM)

7) Enter Priority (1, 2, 3, or 4)

8) Enter Supervisor *Instructions Pages 8-9*

9) Click the Save



ENTERING ACTUALS ON A QUICK REPORT

On the same page you just created in Quick Report:

Go down to Labor Row, lower right hand corner of page

10) Click on NEW ROW

11) Type in Labor #

12) Using calendars fill in start date and end date.

13) Type start/finish time. (This procedure is only followed when reporting regular hours.) Choose the tab or enter key and the program will calculate the hours based on the start and finish time you input. Save the record once you have confirmed all information is correct.

******For entering OVERTIME/PREMIUM hours. See Detailed Instructions on Page 4**

ENTERING OVERTIME HOURS TO A QUICK REPORT

Follow initial instructions on entering time on Quick Reporting, previous page.

Once you click on new row:

Go to Premium pay, lower middle column.

14) Enter Premium pay code, use magnifying glass, if you need to look up codes.

15) Enter OT justification, (skip to bottom) look up codes if necessary

16) Enter Premium Pay Hours. Go back up to premium pay hours. Example: (2.5, 1.0, etc.)

Save Record using disk on Maximo tool bar menu.
See Page 2 for SAVE Icon location.

TRIP CHARGES (OPTIONAL - IF APPLICABLE)

NOTE: Repeat process

TO ENTER A TRIP CHARGE

Select a new row (refer to page 10, direction #3)

1) Once your new labor window opens, enter the word 'TRIP' in the Labor Box.

2) Input truck # used for the trip

3) Fill in Start Date, use calendar, if needed.

4) Fill in Regular Hours with a 1. If multiple trucks responded a new row will be needed for each trip charge. (Save the record, using the save icon on the tool bar.

ENTERING MATERIALS TO A QUICK REPORT (OPTIONAL - IF APPLICABLE)

Click in the Materials Tab, next to the labor tab in the lower portion of the screen

1) Click on New Row to open a new row for entry.

The screenshot shows the 'Materials' tab selected in a software interface. At the top, there are tabs for 'Labor', 'Materials', 'Services', and 'Tools'. Below the tabs is a header bar with 'Materials', a filter icon, and a 'Download' button. A table with columns 'Task', 'Item', 'Description', 'Transaction Type', 'Storeroom', 'Quantity', and 'Bin' is visible. The table currently contains the text '...No rows to display...'. At the bottom of the interface, there are four buttons: 'Select Materials', 'Select Reserved Items', 'Select Asset Spare Parts', and 'New Row'. The 'New Row' button is circled in red, and a red arrow labeled '1.' points to it.

2) In Line Type, use the drop down menu to choose Material

3) In the Short Description box, type part # (if applicable) and the name of part. If you need to add further information, open the long description box and add info, then click okay to close the box.

4) Fill in the Quantity box

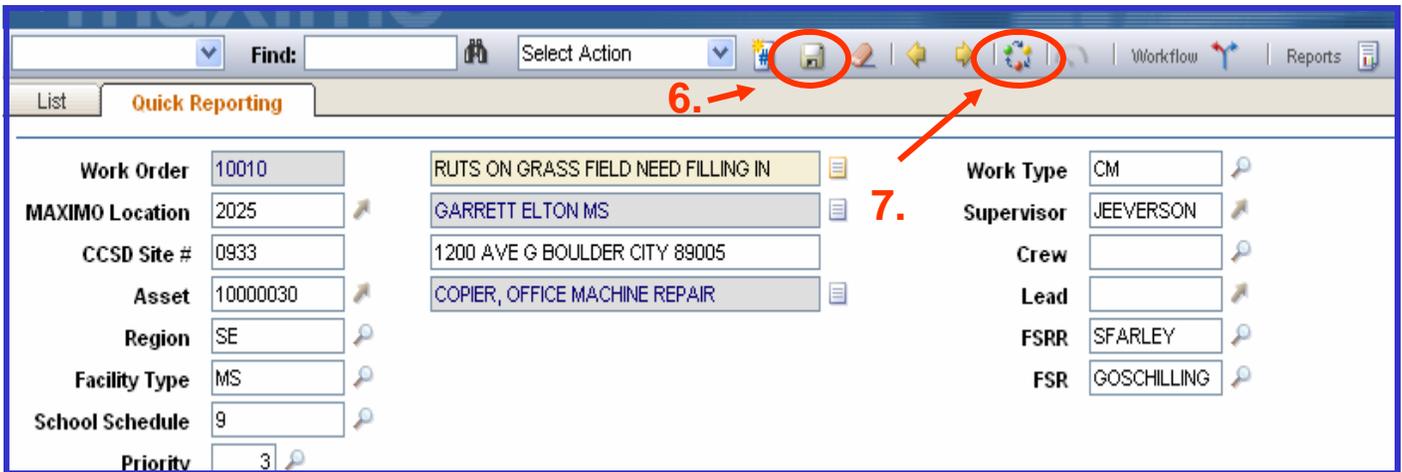
5) Fill in the Unit Cost and then tab or hit the enter key and the program will automatically calculate a total for the part. Review your entry to make sure it is correct.

The screenshot shows the 'Materials' tab with a single row of data. The table has columns 'Task', 'Item', 'Description', 'Transaction Type', 'Storeroom', and 'Quantity'. The row contains: Task (empty), Item (empty), Description (HR52 LIGHT BALLAST), Transaction Type (ISSUE), Storeroom (empty), and Quantity (1.00). Below the table is a 'Details' section with various input fields. Red arrows and numbers 2 through 5 point to specific fields: 2. Line Type (dropdown menu set to MATERIAL), 3. Short Description (HR52 LIGHT BALLAST), 4. Quantity (1.00), and 5. Unit Cost (14.20). Other fields include Lot, Expiration Date, Lot Type, Condition Code, Rate Percentage (100), Condition Enabled?, Stock Category, Entered By (MLDICKERSON), and Actual Date (4/30/07 9:29 AM). The Line Cost is calculated as 14.20.

After all entries have been made and you have double checked each part of the entry for accuracy:

6) Save the record clicking on the Save Icon on the Maximo Toolbar

7) To complete your Quick Reporting WO, you need to change the status. If you are done with the work for this particular WO, Choose "Complete" from the drop down menu that appears when you click on the Change Status Icon on the tool bar. If you are going to continue working on this par-



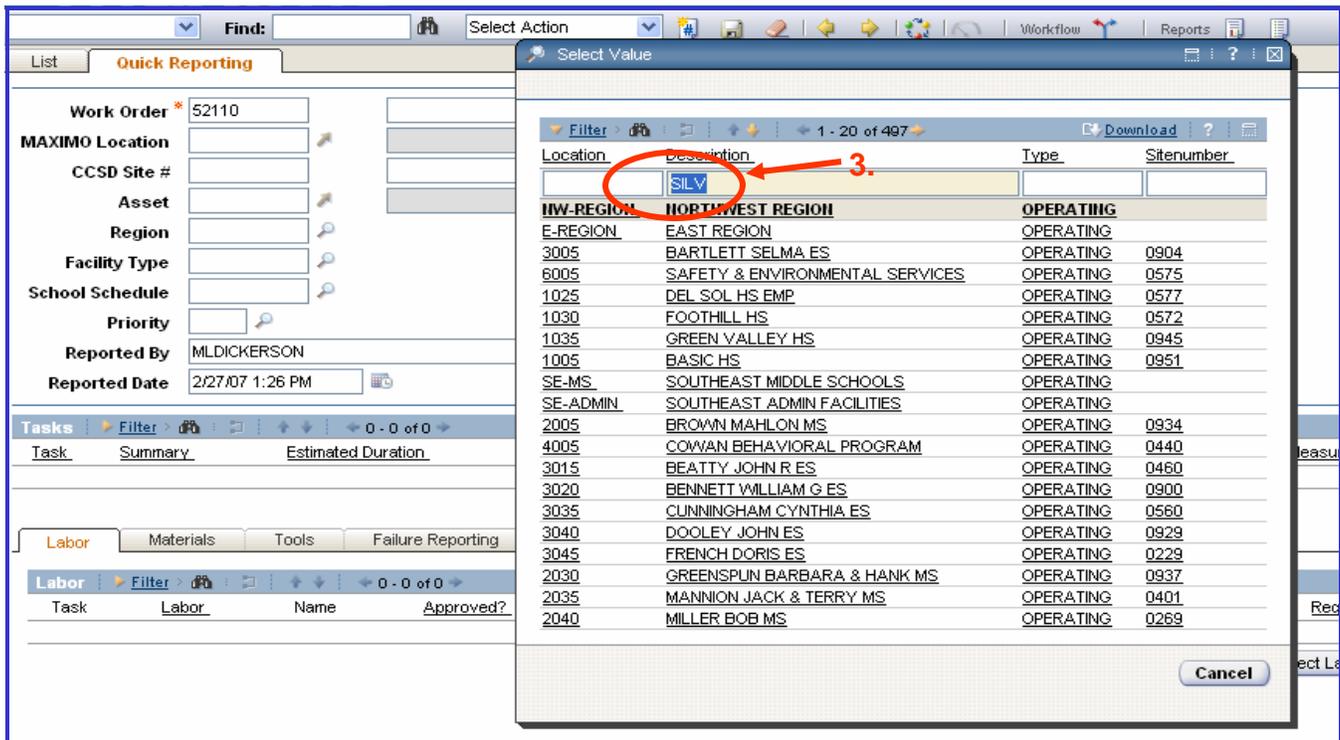
HOW TO SELECT A MAXIMO LOCATION CODE (General Navigation Information)

- 1) Click on the Gray arrow next to Maximo Location Box
- 2) Choose Select Value from Side Menu

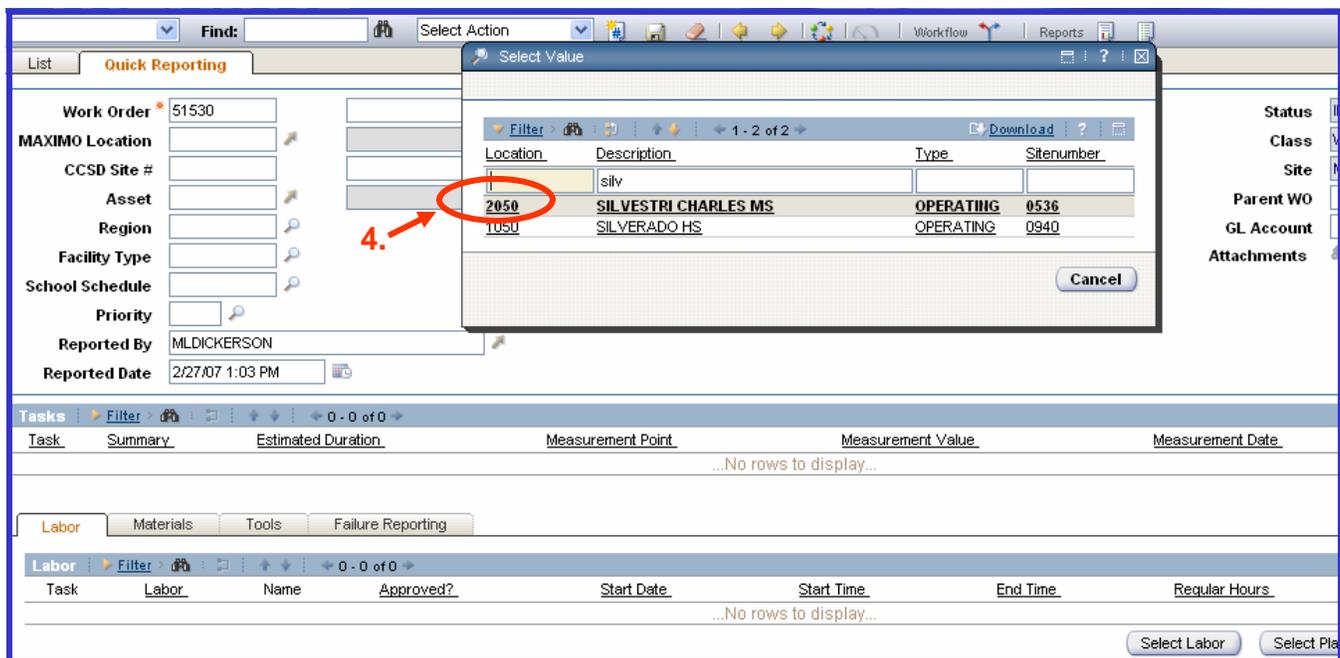
The screenshot shows the Maximo Quick Reporting interface. The 'MAXIMO Location' field is highlighted with a red circle, and a red arrow labeled '1.' points to a gray arrow icon next to it. The 'Work Order' field contains the value '52110'. Other fields include 'CCSD Site #', 'Asset', 'Region', 'Facility Type', 'School Schedule', 'Priority', 'Reported By' (MLDICKERSON), and 'Reported Date' (2/27/07 1:26 PM). The right side of the form contains fields for 'Work Type', 'Supervisor', 'Crew', 'Lead', 'FSRR', and 'FSR'.

The screenshot shows the Maximo Quick Reporting interface with the 'MAXIMO Location' field dropdown menu open. A red circle highlights the 'Select Value' option, and a red arrow labeled '2.' points to it. The 'Work Order' field contains the value '51529'. Other fields include 'CCSD Site #', 'Asset', 'Region', 'Facility Type', 'School Schedule', 'Priority', 'Reported By' (MLDICKERSON), and 'Reported Date' (2/27/07 12:56 PM). The right side of the form contains fields for 'Work Type', 'Supervisor', 'Crew', 'Lead', 'FSRR', 'FSR', 'Status' (INPRG), 'Class' (WORKORDER), 'Site' (MAINT), 'Parent WO', 'GL Account', and 'Attachments'.

3) Type several letters of the school name in the description filter box and hit enter



4) When list of choices appear, choose the location number next to chosen school description. The Select Value box will disappear and the Quick Reporting box will automatically populate all chosen site information. (See next page for example of populated screen.)



Example of Populated Screen

Find: Select Action

List Quick Reporting

Work Order *	<input type="text" value="51530"/>	<input type="text"/>	Work Type	<input type="text"/>
MAXIMO Location	<input type="text" value="2050"/>	<input type="text" value="SILVESTRI CHARLES MS"/>	Supervisor	<input type="text"/>
CCSD Site #	<input type="text" value="0536"/>	<input type="text" value="1055 SILVERADO RANCH BLVD LY 89123"/>	Crew	<input type="text"/>
Asset	<input type="text"/>	<input type="text"/>	Lead	<input type="text"/>
Region	<input type="text" value="SE"/>		FSRR	<input type="text" value="SFARLEY"/>
Facility Type	<input type="text" value="MS"/>		FSR	<input type="text" value="JSHIFFERT"/>
School Schedule	<input type="text" value="9"/>			
Priority	<input type="text"/>			
Reported By	<input type="text" value="MLDICKERSON"/>			
Reported Date	<input type="text" value="2/27/07 1:03 PM"/>			

HOW TO SELECT A MAXIMO SUPERVISOR CODE

- 1) Click on the Gray arrow next to Supervisor Box
- 2) Choose Select Value from Side Menu

The screenshot shows the Maximo Quick Reporting interface. The 'Supervisor' field is highlighted, and a red circle with an arrow points to the gray arrow icon next to it, labeled '1.'.

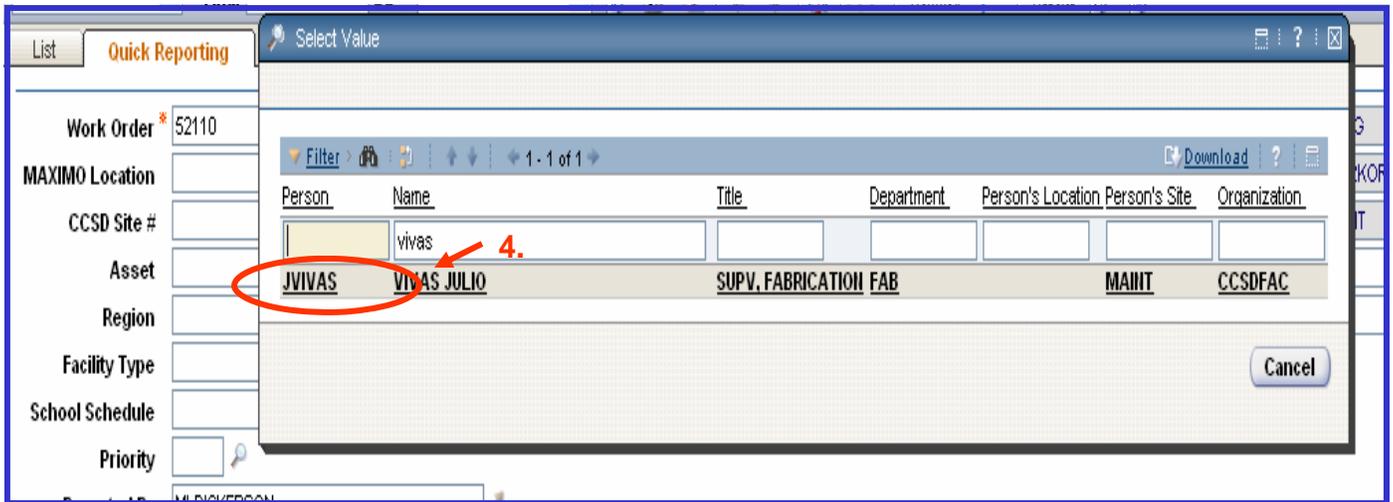
The screenshot shows the Maximo Quick Reporting interface. The 'Supervisor' field dropdown menu is open, showing 'Select Value' and 'Go To People' options. A red circle and arrow point to the 'Select Value' option, labeled '2.'.

- 3) Type several letters of the Supervisor name in the Select Value Name filter box and hit enter.

The screenshot shows the 'Select Value' dialog box. The 'Filter' box contains 'Vivas', and the 'Person' column of the list below is highlighted. A red circle and arrow point to the 'Vivas' entry, labeled '3.'.

Person	Name	Title	Department	Person's Location	Person's Site	Organization
	Vivas					
FJGOHIZALEZ	GOWENSEY TRAIK	GLAZIER	GLZ	MAINT	CCSDFAC	
CCGRANA	GRANA CHRISTIE	SKILLED TRADES ASST. FER		MAINT	CCSDFAC	
SCGREATHOUSE	GREATHOUSE STEPHEN	PLUMBER	ZONE	MAINT	CCSDFAC	
WDGRIFFITH	GRIFFITH WILLIAM	FIRE EQUIPMENT TECH	FER	MAINT	CCSDFAC	
RAGROTH	GROTH RICHARD	CHILLER TECH 1	HVAC	MAINT	CCSDFAC	
PGUASTO	GUASTO PETER	SKILLED TRADES ASST. ZONE		MAINT	CCSDFAC	
DRGUERIN	GUERIN DAVID	CARPENTER	ZONE	MAINT	CCSDFAC	
JHADFIELD	HADFIELD JOHNNY	GLAZIER	GLZ	MAINT	CCSDFAC	
CHAMER	HAMER CLARK	BLDG ENG ZONE	ENG	MAINT	CCSDFAC	
TCOLLINS	Tim Collins	DEVELOP		MAINT	CCSDFAC	
LKABBOTT	ABBOTT LYMAN	SKILLED TRADES ASST. FER		MAINT	CCSDFAC	
LBABBOTT	ABBOTT LAREN	BUILDING ENGINEER	ENG	MAINT	CCSDFAC	
DAABELT	ABELT DARRYL	SKILLED TRADES ASST. ASP		MAINT	CCSDFAC	
BLACKERMAN	ACKERMAN BARRY	PLUMBER	PLM	MAINT	CCSDFAC	
NLADAMS	ADAMS NYLE	INDUSTRIAL ARTS TECH IAR		MAINT	CCSDFAC	
HEADEN	ADEN HOWARD	MAINTENANCE LEADER	ELE	MAINT	CCSDFAC	
KGADRIANSEN	ADRIANSEN KIM	SKILLED TRADES ASST. FAB		MAINT	CCSDFAC	
JMAGEE	AGEE JAMES	DUPL EQUIP TECH	OMR	MAINT	CCSDFAC	
FGALCARAZ	ALCARAZ FELIPE	ELECTRICIAN	ELE	MAINT	CCSDFAC	
PDALLEN	ALLEN PAUL	ROOFER	ROF	MAINT	CCSDFAC	

4) When list of choices appear, click on the correct underlined Supervisor User Name below the Person column.



The Select Value box window will disappear and the Quick Reporting box will automatically populate the Supervisor Box. (See below.)

