



Maximo Quick Reporting

WORK ORDER TASKS

WORK ORDER CREATION THROUGH QUICK REPORTING ENTERING ACTUALS - QUICK REPORT ENTERING OVERTIME HOURS - QUICK REPORT ENTERING MATERIALS - QUICK REPORT HOW TO SELECT A MAXIMO LOCATION CODE HOW TO SELECT A MAXIMO SUPERVISOR CODE

WORK ORDER CREATION THROUGH QUICK REPORTING

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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

Quick Reporting		¢ G	io To 🛯 Lu Reports 🕈 Start Center	🌲 Profile 🛛 🔻 Sign Out 📍 Helj
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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

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ENTERING ACTUALS ON A QUICK REPORT

List Work MAXIMO Li CCSI	Ouick Reportin k Order * 51528 ocation 1010 D Site # 0941 Asset Region SE		CALL OUT- PROBLEM SE BOULDER CITY HS 1101 FIFTH STREET, BOU	CLRING ADMIN DOOF	Work Type Supervisor Crew Lead FSRR	EM P COPETRE SFARLEY P SFARLEY P	Status Class Site Parent WO GL Account	INPRG WORKORDER MAINT 3310000941	On the same page you just created in Quick Report: Go down to Labor Row, lower right hand corner of page
Facili School Sc	ty lype HS :hedule 9				FSR	GOSCHILLING	Attachments	¢.	10) Click on NEW
Repo	Priority 2 rted By MLDIC	2 P KERSON	1						RÓW
Report	ed Date 2/27/0	17 9:23 AM	1 0						
Tasks 🜖	<mark>Filter</mark> ≥d å ÷‡] ↓ ↓ ↓ (I • O of O →					El/ <u>Download</u> ? E	
<u>Task</u>	<u>Summary</u>	Estimated D	uration_	Measurement Point	Meas	urement Value	Measurement Date	<u>Status</u>	
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Task	Labor	Name	Approved?	Start Date	Start Time	End Time	Regular Hours	Rate	
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							Select Labor Select	Planned Labor New Row)← 10.

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

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Outside Labor	Regular Hours * 0:00 Rate * Premium	Line Cost	0.00
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ENTERING OVERTIME HOURS TO A QUICK REPORT

			Follow initial instructions on entering time on Quick
Labor Materials Tools Failure Repo	rting		Reporting, previous page.
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Task <u>Labor</u> Name	Approved? Start D	ate <u>Start Time End Time</u> Regular Hours <u>Rate</u>	
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Task 📃 🔎	Labor *	Approvett?	14) Enter Premium pay code, use magnifying glass,
	Details		if you need to look up codes.
Craft *	Start Time End Time	Timer Status	15) Enter OT justification,
	Regular Hours * 0:00 Line Cost	0.00	codes if necessary
Outside Labor	Premium Pay	Charge Information	16) Enter Premium Pay
Outside?	14. Premium Pay Code	GL Debit Account 9310000941 P	Hours. Go back up to
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Revision	Premium Rate Type 📃 🔎	Asset 🥒	
	OT Justification 🖉 🖉	Memo	Save Record using disk on
	15.	Recorded as Received	See Page 2 for SAVE Icon
		Select Labor Select Planned Labor New Row	location.

TRIP CHARGES (OPTIONAL - IF APPLICABLE)

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		Out	tside Labor			Prer	nium Pay				Charge	Informatio

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.

Labor	Materials	Services Tools				
Materiale	Eilfor \ 🖧 :	n i A ≜ i Ao o.40.	<u></u>			Pi Download 121
Task	ten	Description	Transaction Type	Storeroom	Quantity	Bin
			No rows to displa	<u></u> У		
				Select Materials Select Reserved Items	Select Asset Sp	are Parts New Row

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

3) In the <u>Short Description box</u>, 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 <u>Quantity</u> box

5) Fill in the <u>Unit Cost</u> 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.

Labor	Materials	Services	Tools			
Materials	: 🗄 🕨 Filter > 🦚	1 2 2 4 4 F	◆ 1 - 1 of 1 ◆			
Task	tem		Description_	Transaction Type	e Storeroom	Quantity
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	Unit Cost 🤇	14.20	•		Stock Category	P
Credi	t Card Used?		5		Entered By	MLDICKERSON
Credit (Card Number		0.		Actual Date	* 4/30/07 9:29 AM
	Line Cost	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 <u>change the status</u>. 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 <u>Change Status Icon</u> on the tool bar. If you are going to continue working on this par-

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CCSD Site #	0933	12	200 AVE	E G BOULDER C	ITY 89005		Crew		P
Asset	10000030	N CC	OPIER, O	OFFICE MACHINE	EREPAIR		Lead		2
Region	SE	P					FSRR	SFARLEY	₽
Facility Type	MS	P					FSR	GOSCHILLING	P
School Schedule	9	P							
Prioritv	3 🔎								

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

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

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

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Reported By MLDICKERSON	1005	BASIC HS	OPERATING	0951	
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	3020	BENNETT WILLIAM G ES	OPERATING	0900	L
	<u>3035</u>	CUNNINGHAM CYNTHIA ES	OPERATING	<u>0560</u>	
Labor Materials Tools Failure Rep	orting <u>3040</u>	DOOLEY JOHN ES	OPERATING	0929	
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	2040	MILLER BOB MS	OPERATING	0269	
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4) When list of choices appear, choose the location number next to chosen school description. The Select Value box window will disappear and the Quick Reporting box will automatically populate all chosen site information. (See next page for example of populated screen.)

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Example of Populated Screen

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HOW TO SELECT A MAXIMO SUPERVISOR CODE

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

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Facility Type	P			FSR	P
School Schedule	P				
Priority	<i>P</i>				
Reported By	MLDICKERSON	*			
Reported Date	2/27/07 1:24 PM	6			

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

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Region		CCGRANA	GRANA CHRISTIE	SKILLED TRADES ASST	FER	MAINT	CCSDFAC
		SCGREATHOUSE	GREATHOUSE STEPHEN	PLUMBER	ZONE	MAINT	CCSDFAC
Гасшту Туре		WDGRIFFITH	GRIFFITH WILLIAM	FIRE EQUIPMENT TECH	FER	MAINT	CCSDFAC
School Schedule		RAGROTH	GROTH RICHARD	CHILLER TECH 1	HVAC	MAINT	CCSDFAC
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4) When list of choices appear, click on the correct underlined Supervisor User Name below the <u>Person</u> column.

List Quick Reporting	🔑 Select Val	ue				□!?!⊠	
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Work Order * 52110							9
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CCSD Site #	Person	Name_		Department	Person's Location Person's Site	Organization	Π
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Region							L
Facility Type						Cancel	L
School Schedule							L
Priority 📃 🔎							
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The Select Value box window will disappear and the Quick Reporting box will automatically populate the Supervisor Box. (See below.)

List Quick Re	eporting					
Work Order *	52110			Work Type		P
MAXIMO Location	2			Supervisor	JVIVAS	1
CCSD Site #				Crew		2
Asset	1			Lead		Þ
Region	P			FSRR		2
Facility Type	P			FSR		2
School Schedule	P					
Priority	P					
Reported By	MLDICKERSON		2			
Reported Date	2/27/07 1:26 PM	III III III III III III III III III II				