



MAINTENANCE
DIRECT™

MaintenanceDirect User Manual
Version 2.0
SchoolDude.com, Inc.

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Welcome and Thank You for Choosing MaintenanceDirect!

MaintenanceDirect is the answer to all of your educational facility's work management problems! As with all of SchoolDude's products, MaintenanceDirect handles all the hassles and details for you so that you can make every minute of your busy day count.

By putting MaintenanceDirect to work for your educational facility, you can more efficiently manage your time and money by putting everything you need to accomplish in one place, from receiving and checking the status of work orders, to notifying technicians of new work assignments via email, to recording labor and purchasing transactions—and that's not all. Everything you need to streamline your work order process is all right here.

In this manual, we've provided everything you'll need to know to get your projects up and running. You'll learn about your role in MaintenanceDirect, what that role entails, and where you need to go to get started. We'll walk you through the data-entry process, how to find the information you need, and how to access up-to-date work order data anytime, from anywhere, via the Internet.

To make instructions as easy to follow along as possible, you will see page names and important words written in **bold** font while actions you should take (links to click) at any given point, as well as chapter headings, will be shown in **red**. Keep an eye out for "SchoolDude Says" tips and notes, included along the way to make things as easy and understandable as possible.

For your convenience, this manual includes a brief overview of the roles in MaintenanceDirect, as well as a glossary of terms and symbols (SchoolDude Vocabulary) near the very end for easy reference. Please take a moment to look over the glossary before getting started to familiarize yourself with some of the terms and symbols that you'll see throughout your use of MaintenanceDirect. There is also a Help Reference page to guide you to any help you might need via telephone, email, or live online chat, should you still have any questions.

At SchoolDude, we're here to help whenever you need us as you work your way from project to project. Your educational facility is our priority and we are never more than a call or click away. Best of luck and call us if you need us!

MaintenanceDirect Roles: Who's Who in MaintenanceDirect.

MaintenanceDirect users are divided up into individual roles where each role has different capabilities and responsibilities. Each role has its own Home page that acts as a gateway into MaintenanceDirect. Some roles have fewer tabs on their Home page while others have limited access to various links. Below are listed all the roles in MaintenanceDirect, what they are and aren't able to do, and who is usually assigned to each role.

Administrator: This is the only person (or persons) to have access to the entire system, including Account Setup. They can see everything that is going on, including all work orders in the "Work Order by Status" section of the Home page. They have access to all reports and can search for work orders using the Search or Advanced Search options.

Supervisor I: The Supervisor I has access to all of the system, except for Account Setup. They have the ability to view all work orders assigned to them or to anyone who reports to them under the "Work Order by Status" section of their Home page. Some examples of who might be a Supervisor I are head custodians, maintenance foremen, or department heads.

Supervisor II: The Supervisor II is similar to the Supervisor I, except they will only see certain work orders. The work orders they can view may be **limited to certain crafts and/or certain locations**. On the home page, under the "Work Orders by Status" section, they will see all work orders assigned to themselves or to anyone who reports to them and all work orders contained in their location(s) and craft(s). They may have limited access to reports and can only search for any work orders within their locations and crafts via the search or advanced search. Some examples: head custodians, tradesmen, etc.

Technician: A technician only sees work orders assigned to them. However, they have the ability to search for work orders via the Search or Advanced Search options. A technician has limited capabilities for a work order. For example, they are not allowed to reassign a work order to another user. They also have the ability to add their own labor hours and change their work order status to "complete", once they have finished a project.

Site Administrator: The main function of the Site Administrator I is to approve work orders routed to them. They can view all work order requests for their assigned locations and they can also enter new requests. Principals are often assigned to this role.

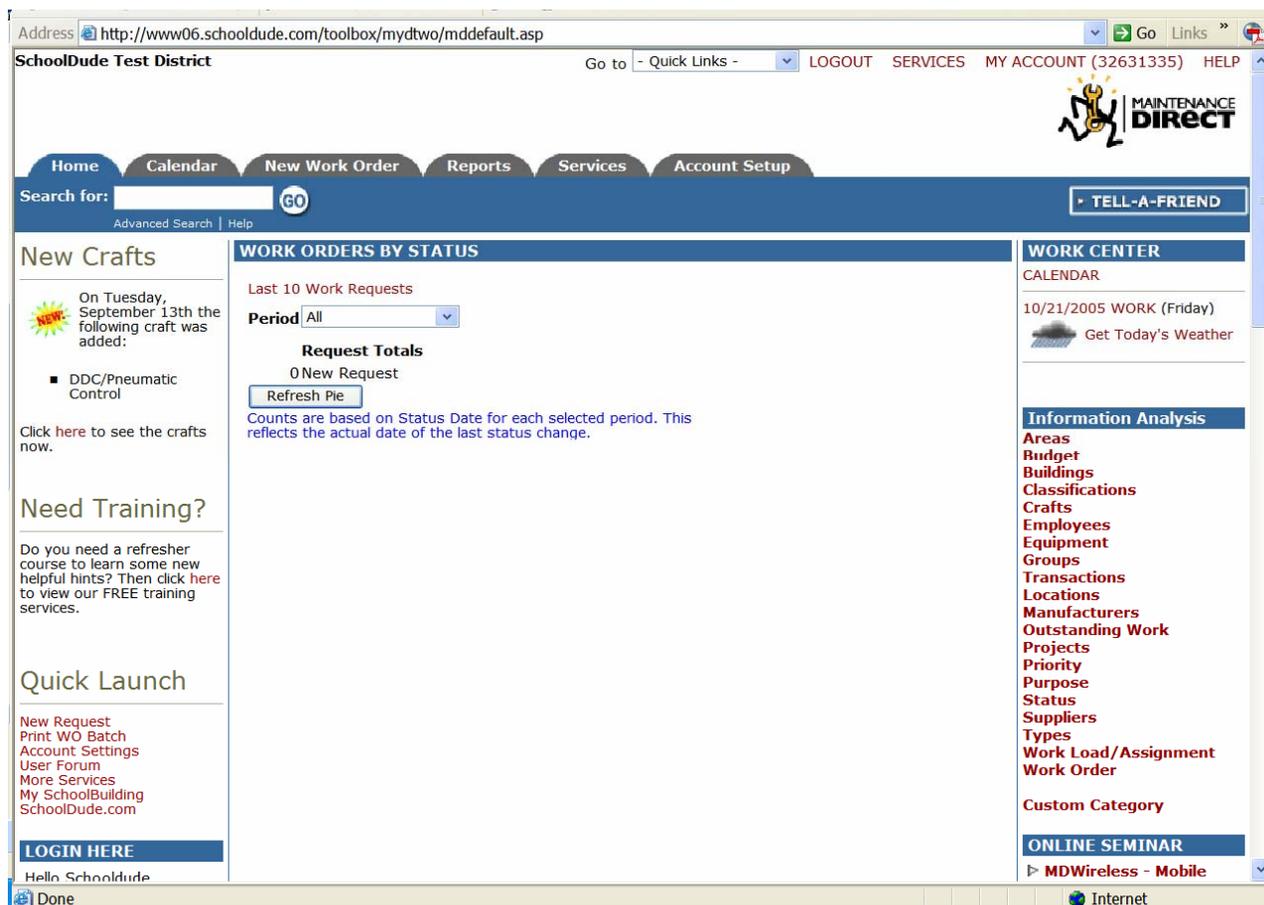
Data Clerk I: The main function of the Clerk I is data entry. The Clerk I has access to all work orders. They can assign new requests, edit and close work orders, as well as view some reports. Work order forms in the Clerk I role are shortened and have keyboard shortcuts to facilitate data entry.

Requester: Requesters are the people who request work orders. They can go to the requester website (<http://www.myschoolbuilding.com>) and submit requests for any location. They also have the ability to view any requests that they have made, as well as the status of those requests.

Administrator Guidelines

I. Welcome to the Home Page! Now What? (A quick overview of what's on the Home page.)

Once you've logged in with your user name and password, you're taken directly to your Home page. It should look something like this:



Across the top of the page, there are six tabs reading: “Home”, “Calendar”, “New Work Order”, “Reports”, “Services”, and “Account Setup”. Each of these tabs will be discussed in detail further on but for now, let's take a look at the Home page. It contains the following:

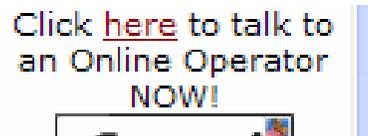
1. **New Crafts:** The craft list in MaintenanceDirect is a predefined list. When you add new crafts to the system, they will show up in this section.

2. **SPECIAL NOTICE**: This section will show near the top, left-hand side of the **Home** page if there is SchoolDude news or announcements that we need to make you aware of, like holiday closings
3. **Quick Launch**: This section provides commonly used links including **New Request**, **Print Work Order Batch**, **Account Settings**, **User Forum** (a place to submit questions and/or problems you encounter while using MaintenanceDirect. You can also read questions others have posted.), and **More Services** (tells you what services are included in your annual MaintenanceDirect fee as well as optional services available and services not included), as well as links to **MySchoolBuilding.com** and **SchoolDude.com**.
4. **LOGIN HERE**: If you are logged in, you should see your name here. If you do not see your name, click the word “**yourself**” to log in correctly.
5. **WORK ORDERS BY STATUS**: The graph that will appear in this section as soon as the first work order is submitted will show the number of work orders by status for the entire educational facility or district.
6. **ASSIGNED WORK**: Near the bottom of the **Home** page, you will find the **Assigned Work** section, where all work orders assigned to you will display. From this section, you can print the work orders, reassign the work, add action taken, or mark it as complete.
7. **WORK CENTER**: The **Work Center** provides links to the monthly calendar as well as today’s work. There is also a link to get today’s weather in this section as well. The total number of assigned work orders is displayed here, along with the total number of assigned PreventiveMaintenanceDirect work orders (if you are a PreventiveMaintenanceDirect client).
8. **NJAC 6:24**: If you are a New Jersey client, you will have this section on your **Home** page, which provides links to your M1 and M2 reports.
9. **Information Analysis**: This is your go-to section for “getting it done”. It provides important links for all the major components of work order management: **Areas**, **Budget**, **Buildings**, **Classifications**, **Crafts**, **Employees**, **Equipment**, **Groups**, **Transactions**, **Locations**, **Manufacturers**, **Outstanding Work**, **Projects**, **Priority**, **Purpose**, **Status**, **Suppliers**, **Types**, **Work Load/Assignment**, and **Work Order**.

10. **ONLINE SEMINAR** : This section displays all of the upcoming seminars that SchoolDude will be conducting, along with any online product demonstrations scheduled.

11. **Need Training?**: If you'd like to take a refresher course or would like to learn some new helpful hints, then click in this section on the word "here" to view our free training services.

12. **Help** : links are available in both the top and bottom right-hand corners of your Home page. Clicking on the **Help** link in the top right-hand corner will take you to the MaintenanceDirect manual at any time. If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your Home page. To connect directly with someone from SchoolDude Support via Instant Messenger, click on the word "here" (underlined and highlighted in red). See below:



To write and send an email directly to SchoolDude Support, simply click on the **Email** icon directly below the link we just mentioned. The Email link looks like this:



A blank email form will pop up, already addressed and ready to use.

13. The **Quick Links** provide you with a way to navigate quickly between SchoolDude products. In other words, if you would like to move from MaintenanceDirect to another product used by your school for whatever reason, all you have to do is click on the **Quick Links drop-down box**, choose the SchoolDude product you'd like to visit, and you'll be taken to that product's Home page automatically. Quick Links is located at the top of the Home page, near the right-hand corner, and looks like this:



“Extras”:

14. **Related Articles:** This section just includes an article or two that you may want to check out if you're interested.
15. **Did you know?** : Just a bit of interesting trivia we thought we'd share each day.



SCHOOLDUDE SAYS: Macromedia Flash Player (a free download) is required to view the pie graph on the **Home** page, as well as other graphs throughout MaintenanceDirect.

II. Account Setup: Tell Us All About Yourself!

The first thing you will need to do as Administrator upon logging in for the first time is to set up all of your account information so that all options and fields will be filled in and available for anyone trying to request a trip.

Below are the steps that you'll need to follow **in the order that will assure that the information you need is there when you need it**. Keep in mind that fields marked with a , both in the system and in this manual, are required fields and we will cover those first.



SCHOOLDUDE SAYS: Before you get started, just a note to you about the “Manage Codes” section of Account Setup. All of the codes used throughout MaintenanceDirect are nothing more than available information fields for work orders to make them as clear and useful to your facility as possible. Simply put, Manage Codes is just a way to customize whatever information you would like to include on your work orders.

If there is a code or category that you think should be on all of your work orders but it isn't listed under the Manage Codes section, you can create your own Code using the “Custom Category” option provided in the Manage Codes list.

1. **Getting Started:** Click on the **Account Setup** tab at the top of the Home page. The Account Setup page should look like this:

Address: http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_administrativefunctions.asp

SchoolDude Test District Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP

Home Calendar New Work Order Reports Services **Account Setup**

Search for: **GO** **TELL-A-FRIEND**

Administrative Shortcuts

Account Setup Steps	Account Information	Logo Setup	ID Manage Codes	MD Users
Reporting Assignments	Setup New Request Routing	Manage Email Notifications	Role Setup	
Copy Schema	MySchoolBuilding Setup Wizard	Start New Fiscal Year	ID About Combo	

Your MaintenanceDirect Account Settings

To begin your journey in Maintenance Direct, you should enter your organization's information in the forms below beginning with Account Information. This is a one-time setup but you may come back to make modifications as often as needed.

Please note to begin all that is necessary is Account Information, Locations and Maintenance Direct Users. You may add the other information such as budget codes at any time.

- ▶ **Account Information**
Contains your basic information such as organization name, address, contacts, and fiscal year date range.
- ▶ **Logo Setup**
Upload your organization logo. We'll display your logo on MaintenanceDirect interface and on the My SchoolBuilding website.
- ▶ **Manage Codes**
Add and update all of your system codes such as budget, project, location, and much more.
 - Budget
 - Buildings
 - Areas
 - Crafts
 - Equipment
 - Labor Types
 - Locations
 - Manufacturers
 - Purpose

Done Internet

2. **Account Information:** Click on the **Account Information** link and fill in information regarding Organization, Fiscal Year, Date Ranges, and Miscellaneous preferences.

- **Maintenance Department Name**
- **Address, City, State/Province, Zip Code, Country:** Enter your complete address here. This is the address that will appear on all of your invoices. Your **Time Zone** and **Current Server Date/Time** should appear automatically, based on your address information.
- **Last Assigned Work Order Number:** This number should already be showing as 99. This is so that your work orders will start with the number 100. You can change this number if you wish; however, you **CAN'T** change it to anything below **100**.
- **Maintenance Emergency Phone, Pager, and Contact (Name):** Enter your emergency contact information here. This information will be displayed to your requesters on MySchoolBuilding.com.
- **Current Period:** Define the beginning and ending dates of your fiscal year.
- **Your Work Order Custom Category Label:** Define the label for your custom category here. Custom category is available to track any custom information.
- **PM Purpose Code:** If you have PMDirect, define your PM purpose code. This will generally be "Preventive Maintenance". Any work orders with the purpose defined here will be displayed as a PM work order and will have a yellow background.
- **FS Purpose Code:** If you have FSDirect, define your FS purpose code. This will generally be "Facility Scheduling" or something similar. Any work orders with the purpose defined here will be displayed as a FS work order and will have a blue background.
- **Use NJAC 6:24:** If you are a New Jersey client, check this box. If you are not a New Jersey client, make sure this box is un-checked. Checking this box will give New Jersey clients access to the M1 and M2 reports.
- **Sales Tax Rate:** Enter the sales tax rate here. This field should be left blank if rate calculation is not preferred on the purchase transaction form.

- **Work Order Form:** Select which work order form you'd like to use by choosing from the options in the drop-down box. Options can be previewed by clicking the "Preview" link.
- **Print Work Order Form:** Choose HTML or Adobe. If you would like for a **bar code** to be printed on the work order form, click the check box. The bar code allows for a work order to simply be scanned into the system.
- **Default Estimated Start Date to Today's Date?:** This will input today's date in the Target Start Date field of the work order form. Uncheck this box if not.
- Click the **Update Information** button to save changes.



SCHOOLDUDE SAYS: The comptroller serves as the "safety net" of work order routing. Any work order the system doesn't know how to route gets sent to the comptroller. Also, if no service provider support is set up for a task, the task gets assigned to the comptroller.

3. Budgets: If you would like to keep track of budgeting and project-related costs (optional), enter your budget information here. A Budget option will show up in the next step of your Account Setup process (Locations), so in order to have it available then, it should be set up now. You can have a different budget for each location or for each project. Organize your budgets in the way that works best for you.

To get started, click the [Budget](#) link on the Account Setup page.

- On the My Budget Codes page, click the [Add New Budget Code](#) link.
- Under “Add/Update Budget Code”, enter a code for the budget.
- In the “Description” field, give the budget a self-explanatory name or give a brief description of what the budget is for.
- Enter any Fiscal Year Budget Monies and any notes you wish to include.
- Click [Submit](#).



SCHOOLDUDE SAYS: Keep in mind that the Budget window will display the budget’s code and description. You will have room for about 30 characters.

When the page refreshes, you will be taken back to the **My Budget Codes** page where you will see the new budget has been added at the bottom of the list.

Initially, it will show with a yellow thumbs-up (👍) next to it, which indicates that the budget is currently active. To deactivate the budget (and to reactivate it at any time), simply click on the thumbs-up. This will change it to a grey thumbs-down (👎), which indicates that the budget is inactive.

If you click on the **name** of your new fund, shown on the **My Budget Codes** page in red, you will be taken back to the **Add/Update Budget Code** page for that particular budget, where you will notice the following changes:

1. A **Budget vs. Expenses** bar graph will appear on the right-hand side of the screen, showing budgeted monies and expenses to date (fiscal).
2. **Budgeted Monies** will show at this time as well as **Expenses to Date (Fiscal)**.

- To delete or update a Budget at any time, click on the **Budget name** on the My Budget Codes page. Once on the Add/Update Budget page, you can either edit the budget information, clicking **Save** when you're finished, or you can scroll down to the bottom and click **Delete** to take the budget off of your list.



SCHOOLDUDE SAYS: Budgets with costs attached can NOT be deleted unless costs are reassigned.

Also, changes in \$ amount update each night at midnight.

4. Locations: Locations are typically campuses in a school district. If you manage a single campus, you may want to use locations for different places on that campus. (Examples: Dude High School, West Campus)



SCHOOLDUDE SAYS: Keep in mind that **Locations** and **Buildings** are better kept separate. In other words, try to make sure you don't put your main locations under "Buildings", even if you are working with a single campus. This is largely because (besides being a little less confusing) **Locations** are universal throughout all of SchoolDude's products. So entering your locations into one product would automatically transfer those locations to any other SchoolDude products that you work with now or that you will work with in the future. If all of your locations are stored under "Buildings", however, those locations won't transfer.

To enter each school in your district or location on your school's campus, click on the **Locations** link on the **Account Setup** page and follow the steps below:

- Click the **Add New Location** link.
- On the **Add/Update Location** page, assign a code to your location and enter it in the **Location Code** field. (An example of a Location Code would be "THS" for "Triton High School").
- In **Description**, enter the name of the location.
- Enter any further information you have, including number of students at each location, square footage, any notes you wish to make, and budget code. Then click **Add/Update Record**.

You will be taken to the following page:

Address http://www06.schoolde.com/toolbox/mydtWO/mydtWO_s/mydtWO_LocationUpdate.asp?sortBy=locdesasc&LocID=13830&spaceChar=# Go Links

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend: Indicates required information.

Add/Update Location

Location Code 1234

Location Description South Sloan High School

Number of Students 1300
Note: Enter the number of students served by this location.

Square Footage 0

Date Built

Notes

Budget Code -- Select Budget Account --

Total Location Cost YTD \$0.00

(Note: Calculations shown on this page represent costs through yesterday.
For up-to-date calculations use "Print Your Costs" options.)

IMPORTANT: Please save your location changes by clicking the above "Add/Update Record" button before setting up the new request routing processes below.

Setup New Request Routing

i Route to next is available only after selecting location, craft and when route to. If a route to cannot be determined for a new work request, then it is automatically routed to the comptroller setup under account settings.

i If the Route To Next is a Site Administrator I then they must have view rights for the

Location Costs

Note: Right click on the graph to print.

You can make changes to your Budget information on this page now or at any time by clicking on the name of the budget on the **My Budget Codes** page. The Location Costs section to the right is a graph that will show costs for this location for This Month in green and Last Month in purple.

Near the bottom of the page, you will notice a section that looks like this:

Address http://www06.schooldude.com/toolbox/mydtWO/mydtWO_s/mydtWO_LocationUpdate.asp?sortBy=locdesasc&LocID=13831&spaceChar=# Go Links »

Total Location Cost YTD \$0.00 Note: Right click on the graph to print.

(Note: Calculations shown on this page represent costs through yesterday.
For up-to-date calculations use "Print Your Costs" options.)

[Add/Update Record](#) [Delete Record](#)
[Clear Fields](#)
[Go Back to Location List](#)

IMPORTANT: Please save your location changes by clicking the above "Add/Update Record" button before setting up the new request routing processes below."

Setup New Request Routing

i Route to next is available only after selecting location, craft and when route to. If a route to cannot be determined for a new work request, then it is automatically routed to the comptroller setup under account settings.

i If the Route To Next is a Site Administrator I then they must have view rights for the indicated location. Otherwise, the new request is routed to the comptroller. See routing rules.

Location South Sloan High School **Craft** -- Include All Crafts -- [Add New](#)

1 - 0 of total 0 listed « First Prev Next Last »

Edit	Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing

Add New

Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
On Any	On Any	--No One--	<input type="checkbox"/>
On Any	On Any	--No One--	<input type="checkbox"/>

[Add New](#)



SCHOOLDUDE SAYS: The Setup New Request Routing section near the bottom of the page will be useful for quick setup of new locations later on but for now, we recommend waiting to set up New Request Routing during the step-by-step process of the Account Setup (further along in this manual) so that you can better see how information is entered and where it will consequently show up within the system later. In other words, as a new user of MaintenanceDirect, following the regular Account Setup format will help you get a better understanding of how the product works.

- Your Location information has been saved. To see the new Location listed, return to the **My Locations** page by clicking the **Go Back to Locations List** link in red, just beneath the "Add/Update Record" and "Delete Record" buttons or by clicking the **My Locations** shortcut at the top of the page.
- To continue adding locations, click the **Add New Location** shortcut and repeat above steps. You can see the information you've entered by clicking on the **List My Locations** shortcut.

- To delete a Location, click on the **Locations** link from the **Account Setup** page. Click on the **name** of the location on the **My Locations** page, scroll to the bottom of the **Add/Update Location** page, and click **Delete**. Confirm by clicking **OK** in the box that will pop up and you will immediately be taken back to the **My Locations** page which will show that the location has been deleted.



SCHOOLDUDE SAYS: You will not be able to delete a location once costs have been assigned to it.

5. Buildings: This section is optional, but if you have multiple free-standing structures on a campus, you might list these as buildings for a particular location. (Examples: Dude Hall, Smith Performing Arts Center, etc.) Try to avoid using smaller structures like field houses, pump houses, or modular units as Buildings.

The My Buildings page can be reached by clicking on the **Buildings** link on the Account Setup page. It should look something like this:

The screenshot displays the 'Sloan County Schools' Maintenance Direct interface. At the top, there's a navigation bar with 'Go to' and a dropdown menu for 'Quick Links', along with links for 'LOGOUT', 'SERVICES', 'MY ACCOUNT (32631335)', and 'HELP'. Below this is a secondary navigation bar with buttons for 'Home', 'Calendar', 'New Work Order', 'Reports', 'Services', and 'Account Setup'. A search bar is located below the navigation, with a 'GO' button and a 'TELL-A-FRIEND' link. The main content area features 'Building Shortcuts' with icons for 'Talk About It!', 'Suppliers', 'Account Setup Steps', 'New', 'My Buildings', 'Graph My Costs', and 'Print My Costs'. A disclaimer states: '* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.' Below this is a 'Legend' section and a 'Filtering' section with a dropdown menu for 'View buildings starting by:' and a list of letters from 0 to Z. The 'My Buildings' section shows '1 - 0 of total 0 listed' and a '+ Add New Building' link. A table header is visible with columns: 'Name', 'Location', 'Sq. Ft.', 'No. Student', '*Calendar YTD Cost', and '*Fiscal YTD Cost'. Below the table, it says 'No record found.' and another '+ Add New Building' link. A 'Print This!' button is also present. The footer includes a 'Powered by: SCHOOL DUDE .com' logo, a 'Conditions of Use | Privacy Policy | Security Statement' link, a 'Click here to talk to an Online Operator NOW!' link, and a 'LOGIN SERVICES MY ACCOUNT (32631335) HELP' bar. The copyright notice at the bottom reads: 'Copyright © 1999-2001 SchoolDude.com, Inc. All Rights Reserved. Legal Stuff'.

Get started adding Buildings by following these steps:

- Click the **+Add New Building** link.
- Select the **Location** of the building from the drop-down box provided.
- Enter the **Name** of the building.
- Include square footage and number of students served, if desired.
- Click **Save**.

You will then be taken back to the **My Buildings** page which will show the new building that you just entered. Continue adding Buildings by clicking the **+Add New Building** link and repeating the steps above.

- To edit/update information for a particular building, simply click on that building's name on the **My Buildings** page, make the changes that you wish to make on the **Add/Update Building** page, and click **Save**.
- To **Delete** a building, simply click on the name of that building on the **My Buildings** page. Once on the **Add/Update Building** page, click the **Delete** button near the bottom. The building will then be deleted.

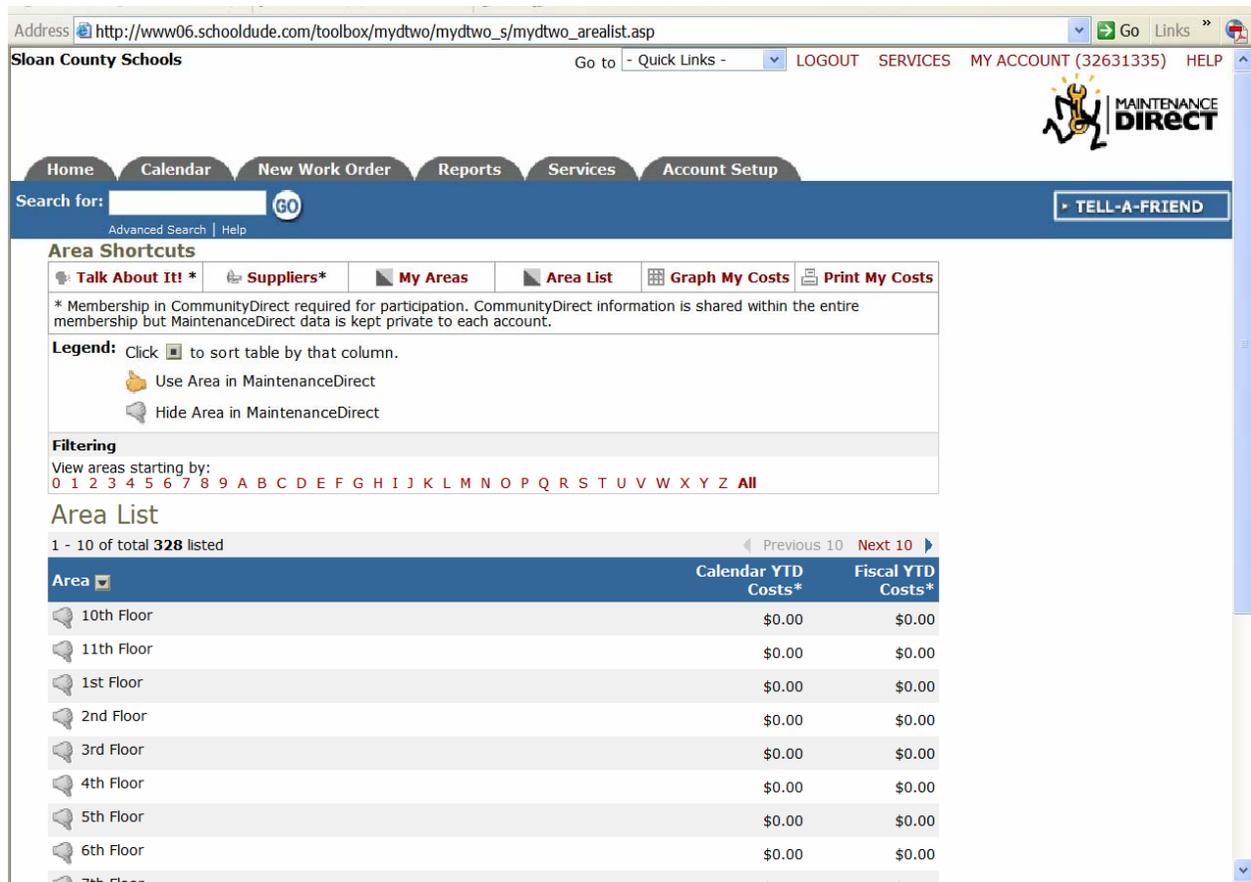


SCHOOLDUDE SAYS: You will not be able to delete a building once costs have been assigned to it.

6. Areas: Areas are predefined and listed in MaintenanceDirect for your use. Some examples of these Areas are: “1st Floor”, “Auditorium”, and “Classroom”. Areas, though optional, are another way to clarify reports by narrowing criteria.

To set up Areas, simply follow these steps:

- From the **Account Setup** page, click on the **Areas** link. The page you are taken should look like this:



- Begin activating Areas by scrolling through the list of Areas given and clicking on the grey thumbs-down (👎) to change it to a yellow thumbs-up (👍), which indicates that the Area is then active.



SCHOOLDUDE SAYS: To speed up this process, click on the **My Areas** shortcut at the top of the page:



This will take you to a long list of all the Areas that you can simply scroll down and activate, rather than switching from page to page with every ten Areas (there are currently more than 300!).

Also, try starting out with the smallest number of Areas activated as possible to limit the confusion of your new users when they fill out a form. You can always activate more areas later.

7. Crafts: Crafts are generic skills needed to fix a problem. MaintenanceDirect has over 200 crafts to choose from. Crafts help you organize your work and assign it to the appropriate people. Think of crafts as another way of saying “trade code” or “problem type”.

To set up Crafts, simply follow these steps:

- From the Account Setup page, click on the **Crafts** link.

The page you are taken to should look like this:

Craft Shortcuts

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend: Click to sort table by that column.

- Use Craft in MaintenanceDirect
- Hide Craft in MaintenanceDirect

Crafts are pre-defined in MaintenanceDirect. You cannot change the codes. Feel free to submit suggestions for other craft categories to help improve this list for all users to [Customer Service](#).

Filtering
View crafts starting by:
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

My Crafts
1 - 20 of total 225 listed

Craft <input type="checkbox"/>	Calendar YTD Count*	Calendar YTD Costs*	Fiscal YTD Count*	Fiscal YTD Costs*	Total Count*	Location Analysis
Advertisements	0	\$0.00	0	\$0.00	0	Expenditures
Air Conditioning	0	\$0.00	0	\$0.00	0	Expenditures
Alarm	0	\$0.00	0	\$0.00	0	Expenditures
Appliance Repair	0	\$0.00	0	\$0.00	0	Expenditures
Architect	0	\$0.00	0	\$0.00	0	Expenditures
Asbestos	0	\$0.00	0	\$0.00	0	Expenditures
Asphalt	0	\$0.00	0	\$0.00	0	Expenditures

- Begin activating Crafts by scrolling through the list of Crafts given and clicking on the grey thumbs-down () to change it to a yellow thumbs-up () , which indicates that the Craft is then active.



SCHOOLDUDE SAYS: To speed up this process, click on the **My Crafts shortcut** at the top of the page:



This will take you to a long list of all the Crafts that you can simply scroll down and activate, rather than switching from page to page with every twenty Crafts (there are currently more than 200!).

Again, try starting out with the smallest number of Crafts activated as possible to limit the confusion of your new users when they fill out a form. You can always activate more crafts later.

8. **Users:** This is where you will identify all MaintenanceDirect and MySchoolBuilding.com users, their roles, crafts, and location responsibilities. You will also create a username and password for each user. Click on the **Users** link on the **Account Setup** page to get started.



SCHOOLDUDE SAYS: We suggest that you wait to add new Requesters during the setup of MySchoolBuilding.com, which will come later in the Account Setup section of this manual. This is because when you come to the step of choosing the new user's personnel type in this section, the choices of "teacher", "principal" or "department head" aren't given. It will be a little less confusing to wait until later to enter users with these roles. For now, just use this step to enter your technicians, supervisors, administrators, etc. Requesters have the ability to add themselves to the user list. To see how, refer to the Requester section of this manual.

- Click the **New** link under Participant Shortcuts or the **+Add User** links on the far right-hand side of the screen just below the words "List of MaintenanceDirect Users" or on the left-hand side of the screen just below where the users will be listed.

The List of MaintenanceDirect Users page will look something like this:

Address http://www06.schooldude.com/toolbox/mydtWO/mydtWO_s/mydtwo-participantslist.asp Go Links

Sloan County Schools Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP

Home Calendar New Work Order Reports Services Account Setup

Search for: GO TELL-A-FRIEND

Participant Shortcuts

Back to Administrative Functions	+ New	+ New Requester	MD Login Log	User List	Change Work Order Requester	
User Reports	MD Role	Assigned Locations	Assigned Crafts	Labor Rate	Reassign Work	Contact Info
User History						

Legend: Click to sort table by that column.
This icon appears when a user login is disabled.

Filtering

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Role:

Personnel Type:

List of MaintenanceDirect Users [Back to Admin](#) [+ Add User](#)

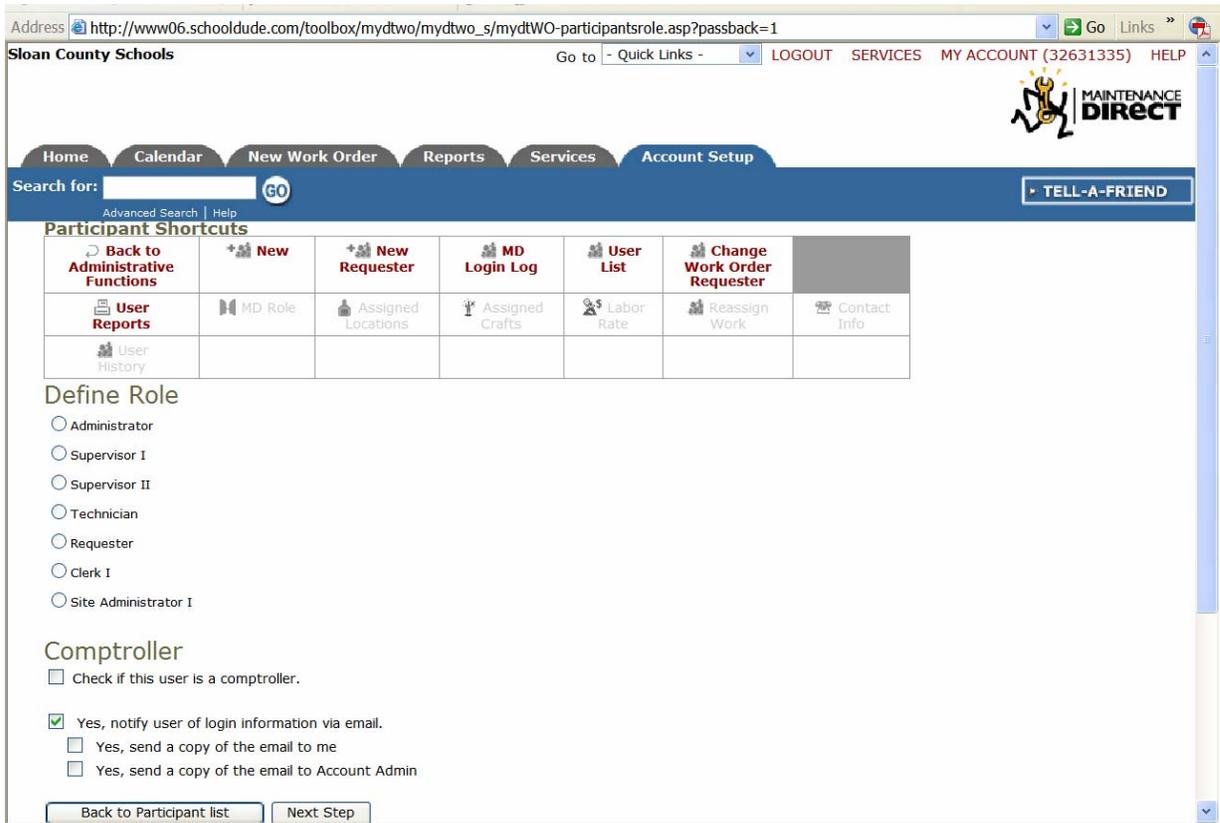
1 - 1 of total 1 listed [First](#) [Prev](#) [Next](#) [Last](#)

Name	Email	Phone	Pager	Role
	Date Added	Fax	Cellular Phone	Personnel Type
			Labor Rate	
Administrator, Schooldude	schooldudeadmin@schooldude.com 10/5/2005 10:26:26 AM	919-555-2962		Administrator Not Assigned \$0.00

[+ Add User](#) [First](#) [Prev](#) [Next](#) [Last](#)

Print This!

- You will be taken to a page that will allow you to either choose from a drop-down box of registered users already entered into the SchoolDude system or to add a completely new user.
- To add a new user to MaintenanceDirect, click the **New User** button. You will be taken to the following page:



Follow these steps:

- Choose which **role** the new user will have.
- If this person will be the comptroller of your account, indicate so here by clicking in the **check box** provided. *Note that there can only be one comptroller.*
- If you would like for the new user to be informed of their login information via email, leave the check box provided checked. If not, click on the box to remove the green check mark. If you would like to have a copy of the email sent to you and/or the Account Administrator (if someone in addition to you), indicate this by clicking in the **check boxes** provided.

- Click **Next Step**.

Continue on the next page with the following steps:

- Create a **Login Name** for the new user.
- Create a **password** for the new user. Choose a password that will be easy for them to remember and at least six characters long. If you use the password “newuser”, they will be asked to change their password when they log in for the first time.
- Enter the **First Name**, **Last Name**, and **Email** address of the new user.
- If you would like for this user to receive email notifications, leave the check box provided checked. If not, click on the check box to remove the green check mark.
- Select who this user will report to from the drop-down box provided. This is only necessary if you are setting up a technician to report to a supervisor.
- Choose the personnel type of the new user from the list in the drop-down box provided. This serves informational purposes only and has no effect on the functionality of that user.
- Enter the user’s phone, fax, and pager number, if available.
- If you would like for this user to receive notifications via pager, click in the check box provided.
- If you would like for this user to receive emails via pager only for emergency work orders, click in the check box provided.
- If you would like for this user to be notified electronically by cell phone, click in the check box provided.
- If you would like for this user to receive notifications via cell phone only for emergency work orders, click in the check box provided.
- If you would like to disable this user’s login at any time, click on the check box provided here. Enter the effective date next, if applicable.
- Enter the user’s employment and termination dates next, as well as any notes you wish to include.
- Click **Next Step**.



SCHOOLDUDE SAYS: If you receive a message stating that the Login Name already exists, you may have created a name that is already being used by another SchoolDude client. Try changing the login name and submitting it again.

The next page you are taken to will look something like this:

Location	Performs work at (Check all that apply):	Serves primarily at (Check all that apply):
Sloan Community College	<input type="checkbox"/>	<input type="checkbox"/>
Sloan Elementary School	<input type="checkbox"/>	<input type="checkbox"/>
Sloan High School	<input type="checkbox"/>	<input type="checkbox"/>
Sloan Middle School	<input type="checkbox"/>	<input type="checkbox"/>
South Sloan High School	<input type="checkbox"/>	<input type="checkbox"/>

- Choose which locations this user will be working from/with and to what extent by clicking the check box next to the appropriate location name in the right column of check boxes. Check all that apply. This is only necessary if you are adding a Site Administrator I or Supervisor II.
- Click **Next Step**.

On the next page, click which crafts this user will be working/concerned with.

- Check the box(es) in the right column of check boxes that the user has a “Working knowledge in” and/or “Skilled knowledge in”. Check all that apply. This is only necessary if you are adding a Supervisor II.

- Click **Next Step**.

The next page allows you to define the labor rate of the new user.

- If this applies to this particular user, choose a labor rate from the drop-down box or enter a specified rate into the box provided.
- Click **Next Step**.
- That's it!



SCHOOLDUDE SAYS: We suggest using an Average Labor Rate and listing that rate for all of your users with the same role or by their trade. To calculate your average labor rate, add the individual hourly rates for all your users, add the cost of benefits and then divide that by the number of workers.

You will then be taken back to the **List of MaintenanceDirect Users** page, which will show the addition of your newest user. Repeat the steps above to continue adding users.

- To view a particular user's information, **make changes**, or **delete** a user, simply click on that user's name on the **List of MaintenanceDirect Users** page, make the desired changes and click **Save** or scroll down to the bottom and click **Delete**.
- If you wish to add a user to MaintenanceDirect that is already registered in the system, simply click the **+Add User** link on the **List of MaintenanceDirect Users** page, choose their name from the Registered Users drop-down box on the next page, click **Add This User**. From that page, follow the previous instructions as you would for a new user.

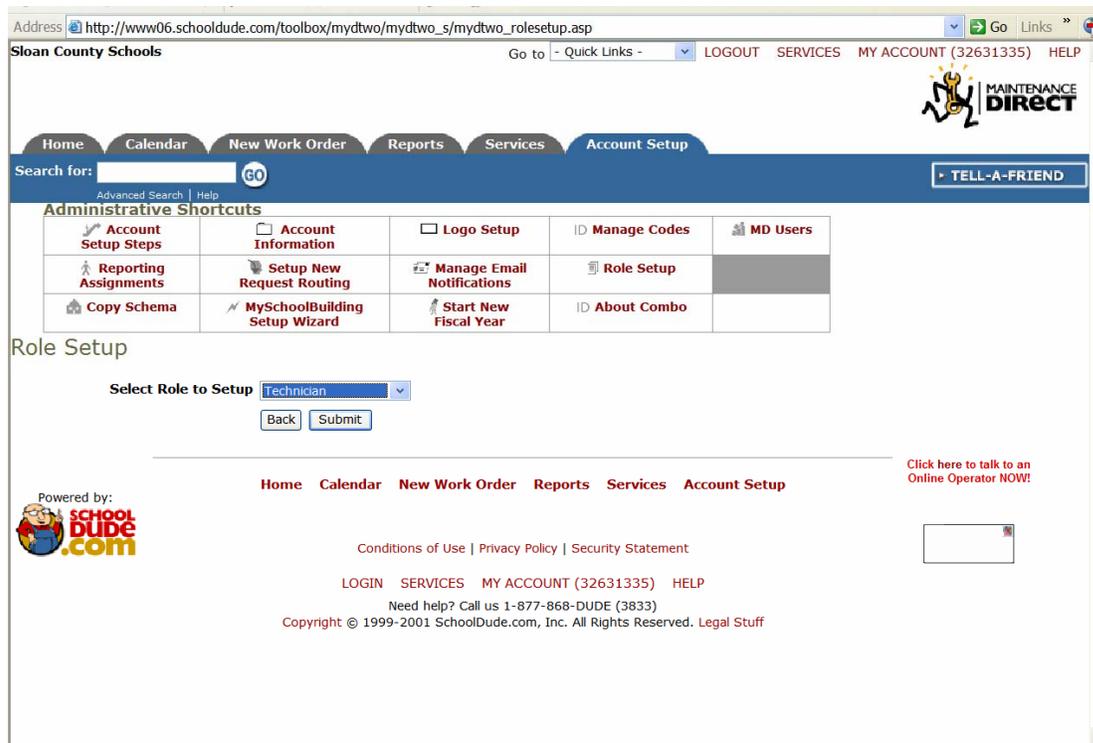


SCHOOLDUDE SAYS: You will **NOT** be able to delete a user once there are work orders assigned to them. However, if you need to, for example, remove a Technician from having access to MaintenanceDirect (or any other SchoolDude product), pull up their information in **Account Setup** and check the **Disable Login** button. This disables their access to the product but you will still be able to run reports on them. This is especially useful when attempting to delete a user that has many work orders or incidents assigned to them.

9. **Role Setup:** You have the ability to choose options for each role you have entered that will determine whether or not the comptroller should be notified when a new user logs in (for the roles of Administrator, Site Administrator 1). The Supervisor II and Technician roles have a few extra options you may select for all users designated to that role.

To set these options, click on the **Role Setup** link on the **Account Setup** page and follow the steps below:

- On the **Role Setup** page, select a **User Role** from the drop-down box. (In the example below, we've chosen "Technician".)



- Click **Submit**.
- On the next page that appears, a check box (or check boxes, depending on which role you select—each role has different options) will appear next to the available options. (See “[SchoolDude Says](#)” on the next page of this manual.) To activate the option, click on the **check box** and a green check will appear.

Address http://www06.schoolde.com/toolbox/mydtwo/mydtwo_s/mydtwo_rolesetup2.asp?roleid=21 Go Links

Sloan County Schools Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP

Home Calendar New Work Order Reports Services Account Setup

Search for: GO TELL-A-FRIEND

Advanced Search | Help

Administrative Shortcuts				
Account Setup Steps	Account Information	Logo Setup	ID Manage Codes	MD Users
Reporting Assignments	Setup New Request Routing	Manage Email Notifications	Role Setup	
Copy Schema	MySchoolBuilding Setup Wizard	Start New Fiscal Year	ID About Combo	

Role Setup for Technician Role

Yes, require technician to enter labor before making work request as closed or complete?
 Default "Will you perform this work?" to "yes"
 Notify Comptroller of new user (login) addition.

Back Save

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[LOGIN](#) [SERVICES](#) [MY ACCOUNT \(32631335\)](#) [HELP](#)

Need help? Call us 1-877-868-DUDE (3833)

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[Click here to talk to an Online Operator NOW!](#)

- Click **Save**.
- To continue setting up roles, click on the **Back** button after the page refreshes. You can also click on the **Role Setup shortcut** box at the top of the page after saving as well to continue.



SCHOOLDUDE SAYS: The Administrator, Supervisor I, Technician, Requester, and Site Administrator I all have one page of options for additional role setup. Only the Supervisor II role setup screen has two pages of optional settings.

10. Routing: At this point, if you wish to employ this option of MaintenanceDirect, you'll need to decide how your work orders will be routed. In other words, who will get a request once it is requested, who will they send it on to, etc.? As this part of the Account Setup process can sometimes seem a little confusing, this section will be a bit longer than the others as we've included more information and explanation to make it as easy to understand as possible.

A work order can have one of eleven statuses during the routing process:

- 1) **New Request:** All work orders are initially set to New Request. Generally, "New Request" means that they have not been assigned to someone for the work to be completed.
- 2) **Work in Progress:** Any work order assigned or scheduled to be completed would be considered a work in progress.
- 3) **Parts on Order:** This defines any work order waiting for the arrival of parts before continuing.
- 4) **On Hold:** Work placed on hold for any reason besides waiting for parts would be placed under the "On Hold" status.
- 5) **Waiting More Information:** If you are waiting for more information from the requester or another person, you would assign the status of "Waiting for Information".
- 6) **Open Extended:** This status applies to any work order that you want to keep open for an extended amount of time. This can be used to keep track of labor hours for a general task done daily.
- 7) **Pending:** All PM work orders will initially have a status of "Pending".
- 8) **Waiting Funding:** This work request is waiting for the money/funds to become available before the work can begin.
- 9) **Deferred:** This status is used to show that a work request has been approved but will be completed at a later date.
- 10) **Forwarded:** This status is used to show work orders that are forwarded to ITDirect. This can be done when a work request is mistakenly entered to the wrong department.
- 11) **Declined:** The declined status will define any work orders that will not be done. They may be declined by a principal or by a person in the maintenance department.

- 12) **Complete:** A complete status signifies that all the actual work has been done. All purchases and labor transactions may not be entered into the system. This will alert the requesters that the work has been done.
- 13) **Closed:** Once all transactions and notes are added into the work order, you would close it. Once a work order is closed, you cannot add any more transactions. (You would have to change the status back to “Complete” in order to add more transactions.
- 14) **Duplicate Request:** This defines any work order entered twice or previously requested.
- 15) **Void:** Voided work orders are work orders that you would like to remove and will not show up in any reports unless specifically requested. You cannot delete a work order so instead, you may want to void them out of the system.

It is also important to know that there are five types of work order routing that you can choose from for use at your educational facility. Those are:

- 1) **Comptroller Routing:** All work orders will go to one person. That one person will decide where they go from there, reassigning them to other supervisors and technicians.
- 2) **Approval-Based Routing:** This method works best if you want your work orders to be approved by a principal or other site administrator before they come to the maintenance department.
- 3) **Craft-Based Routing:** With this type of routing, work orders can be routed to go to certain users based on the craft (problem type) that was selected.
- 4) **Site-Based Routing:** Work orders can be routed to a certain user based on the location that was selected.
- 5) **Combination Craft and Site-Based Routing:** With this type of routing, work orders can go to users based on both the location and the craft that was selected in the work order.



SCHOOLDUDE SAYS: You are not limited to using only these methods of routing in MaintenanceDirect. The above methods are simply examples of our most commonly used routing types. SchoolDude routing is created to be very versatile so that you can change it up to find the way that best suits your educational facility. Feel free to be creative!

Also, keep in mind that any new requests that come in that do not fall within your routes will be routed automatically to your comptroller.



SCHOOLDUDE SAYS:

A Word (or Two) About “When Approved By Route/Assign to Next”:

When Approved By Route/Assign To Next

What this means is that when a work order has been routed, based on its status, to whoever you pick to go in the top drop-down box, it will then be routed next to whoever you pick to go in the bottom drop-down box.

When a requester submits a work request, its status is “New Request” and under this status, it will go to the first person designated to approve work orders (usually the Principal or another Site Administrator). Therefore, No One would go in the top box and the Principal’s name would go in the bottom box. In other words, the request would go first to “No One but the Principal”.

As a quick example (using Approval-based routing), let’s say Tom (a coach) is the requester, Ben (the principal) is the Site Administrator 1, and Howard (in the transportation department, resource allocation, etc.) is the Technician.

Requests are routed to go first to Ben for approval and then (once approved) on to Howard for execution.

Therefore, for the “New Request” status of the request routing process, “No One” would go in the top box and “Ben” would go in the bottom box (the request would first go to “No One” but “Ben”). See below:

Add New

Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
Sloan High School	On Any	--No One--	<input type="checkbox"/>
On Any	On Any	dude, Ben	<input type="checkbox"/>

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Second, Tom’s request, if approved by Ben, would go on to Howard. So, once the request reached “Approved” status, Ben would go in the top box and Howard would go in the bottom box (the request would go on from Ben on to Howard). See below:

Location Craft

[Add New](#)

1 - 1 of total 1 listed First Prev Next Last

Edit	Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
<input type="button" value="Edit"/>	Sloan High School On Any	On Any On Any	No One dude, Ben	No <input type="checkbox"/>

Add New

Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
Sloan High School <input type="text"/>	On Any <input type="text"/>	dude, Ben <input type="text"/>	<input type="checkbox"/>
On Any <input type="text"/>	On Any <input type="text"/>	Dude, Howard <input type="text"/>	<input type="checkbox"/>

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This was an example using the Approval-based routing method, which can be used to decide in what order the routing process will proceed when a work order must first be approved by a principal or other Site Administrator before it comes to the maintenance department. You can choose, based on the descriptions below, which form (or combination of forms) of routing will work best for your educational facility.

Now that you know how “When Approved By Route/Assign To Next” works, let’s move on to the various methods of routing.

MaintenanceDirect Routing 101: Which Method Will Work Best for You?

A. Comptroller-Based Routing: This is the simplest form of routing. If all of your work orders will go to one person, that person is called the “comptroller”. To send all of your work orders to the comptroller, you will just need one route in your system. In this example, Ben Dude is the comptroller:

- In the Location drop-down, you would choose “On Any”.
- For Craft and Purpose, you would also select “On Any”.
- In the “When Approved By Route/Assign to” section, you would select “No One” from the top drop-down box and “Ben Dude” from the bottom drop-down box.

See below:

Add New

Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
On Any	On Any	--No One--	<input type="checkbox"/>
On Any	On Any	dude, Ben	<input type="checkbox"/>

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B. Approval-based Routing: If you would like for a principal or a site administrator to approve each work order before it is routed to the maintenance department, you would choose this method of routing. Your principal/site administrators will need to be in the system as a Site Administrator. You must make sure they have their location defined in their user account. To send all of your work orders to the principal, then to the maintenance department, you will just need two routes in your system for each location.

In the following example, Alfred Dude is the principal of Sloan High School and Howard Dude (distant cousin) is the head of the maintenance Department:

- In the Location drop-down box, you would choose “Sloan High School”.
- For Craft and Purpose, you would select “On Any” from the drop-down boxes provided.
- In the “When Approved By Route/Assign to” section, you would select “No One” from the top drop-down box and “Alfred Dude” from the bottom drop-down box. See below:

Add New

Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
South Sloan High School ▾	On Any ▾	--No One-- ▾	<input type="checkbox"/>
-- No Building Available -- ▾	On Any ▾	Dude, Alfred ▾	<input type="checkbox"/>

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- Click [Add New](#) to save this part of the routing process.
- Next, in the Location drop-down, you would again choose “Sloan High School”.
- For Craft and Purpose, you would select “On Any” from both drop-down boxes.
- In the “When Approved By Route/Assign to” section, you would select “Alfred Dude” to go in the top box and then “Howard Dude” for the bottom box. See below:

Add New

Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
South Sloan High School <input type="button" value="v"/>	On Any <input type="button" value="v"/>	Dude, Alfred <input type="button" value="v"/>	<input type="checkbox"/>
-- No Building Available -- <input type="button" value="v"/>	On Any <input type="button" value="v"/>	Dude, Howard <input type="button" value="v"/>	<input type="checkbox"/>



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- Click **Add New** to save.

- If the last person that the work order is routed to will be the person assigned to complete the work, you would check the **Stop Routing** box. This signals to our system that it the routing process is complete.



SCHOOLDUDE SAYS: Remember that any time a work order request is entered and a route is not defined, it is automatically sent to the comptroller. In the above example, anything that is not from Sloan High School would go to Ben Dude, who is the comptroller of the system.

C. Craft-based Routing: The craft-based method of routing routes work orders to different users based on the craft of the work order. For example, if you wanted all plumbing work orders to be routed directly to the plumber and all the electrical work orders routed to the electrician, you could do that using this method of routing. The plumber and the electrician would, of course, need to be in the system as either a supervisor or a technician.

To send all of your work orders by craft to certain users, you would need as many routes as you would different crafts.

In the following example, Howard Dude is a technician in charge of plumbing and Alfred Dude is a supervisor in charge of all electrical work orders:

- In the Location drop-down box, you would choose “On Any”.
- For the Craft, you would select “Plumbing” from the drop-down box.
- For the Purpose, you would select “On Any”.
- In the “When Approved By Route/Assign to” section, you would select “No One” to go in the top box and then “Howard Dude” for the bottom box.
- Since ALL plumbing requests are sent to Howard, the technician who handles plumbing, you would then click the **Stop Routing** box to indicate that the request will go no further. See below:

Add New

Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
On Any	Plumbing	--No One--	
On Any	On Any	Dude, Howard	<input checked="" type="checkbox"/>

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- Click **Add New** to save this part of the routing process. (This would send all plumbing requests to Howard Dude).
- Next, in the Location section, you would choose “On Any” from the drop-down box.
- For the Craft, you would choose “Electrical”.

- For the Purpose, you would choose “On Any”.
- In the “When Approved By Route/Assign to” section, you would select “No One” to go in the top box and then “Alfred Dude” for the bottom box.
- Since ALL electrical requests are sent to Alfred, the technician who handles electrical issues, you would then click the **Stop Routing** box to indicate that the request will go no further. See below:

Add New

Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
On Any	Electrical	--No One--	
On Any	On Any	Dude, Alfred	<input checked="" type="checkbox"/>

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- Click **Add New** to save this part of the routing. (This would send all electrical requests to Alfred Dude.)
- You would continue with this process until you have covered all of the crafts used by your educational facility.

D. Site-based Routing: The site-based method of routing routes work orders to different users based on the location of the work order. This is useful for clients that have a head custodian or technician at each location.

An example would be if you wanted all work orders for Sloan High School to be routed directly to the head custodian. You can route to either supervisors or technicians. The head custodian/technician would need to be in the system as either a supervisor or a technician.

To send all of your work orders by location to certain users, you would need as many routes as you have different locations. In the following example, Howard Dude is now head custodian of Sloan Community College:

- In the Location section, you would choose “Sloan Community College”.
- For the Craft and Purpose sections, you would select “On Any” to go in both drop-down boxes.
- In the “When Approved By Route/Assign to” section, you would select “No One” to go in the top box and then “Howard Dude” for the bottom box.
- If Howard was the only one assigned to complete work at Sloan Community College, you would then click the **Stop Routing** box. See below:

Add New

Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
Sloan Community College ▾	On Any ▾	--No One-- ▾	
On Any ▾	On Any ▾	Dude, Howard ▾	<input checked="" type="checkbox"/>
<input type="button" value="Add New"/>			

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- Click **Add New** to save. (This would send all requests for Sloan Community College to Howard Dude.)
- You would then continue with this process until you have covered all Locations for your educational facility.

E. Combination of Craft-based and Site-based: You can also choose to have a combination of craft-based and site-based routes, if you want to route work orders to different users based on the location AND the craft of the work order. An example would be if you wanted all custodial work orders for Sloan High School to be routed directly to the head custodian, but you want all electrical work orders for Sloan High School to be routed directly to the electrician at that location. You can route to either supervisors or technicians. The head custodian/technician would need to be in the system as either a supervisor or a technician.

In the following example, let's go back to Sloan High School, where Charles Dude is the head custodian and Ben Dude is the electrician:

- In the Location section, you would select “Sloan High School”.
- For the Craft, you would select “Custodial”.
- For the Purpose, you would choose “On Any”.
- In the “When Approved By Route/Assign to” section, you would select “No One” to go in the top box and then “Charles Dude” for the bottom box. This would send all custodial requests for Sloan High School to Charles Dude.
- If Charles will be the last person at Sloan High School to receive custodial work orders, click the **Stop Routing** box.

See below:

Add New

Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
Sloan High School	Custodial	--No One--	
On Any	On Any	Dude, Charles	<input checked="" type="checkbox"/>

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- Click **Add New** to save this part of the routing process.
- Next, in the Location section, you would select “Sloan High School”.
- For the Craft, you would select “Electrical”.

- For the Purpose, you would choose “On Any”.
- In the “When Approved By Route/Assign to” section, you would select “No One” to go in the top box and then “Ben Dude” for the bottom box. This would send all electrical requests for Sloan High School to Ben Dude.
- If Ben will be the last person at Sloan High School to receive electrical work orders, click the **Stop Routing** box.

See Below:

Add New

Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
Sloan High School	Electrical	--No One--	
On Any	On Any	dude, Ben	<input checked="" type="checkbox"/>

[Add New](#)

[Home](#)
[Calendar](#)
[New Work Order](#)
[Reports](#)
[Services](#)
[Account Setup](#)

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- Click **Add New** to save this part of the routing process.
- If you wanted work orders for the rest of the crafts in the system for Sloan High School to go to a user other than the comptroller (good old Howard again, for instance), you could set up one additional route:
- In the Location section, select “Sloan High School”.
 - For the Craft, choose “On Any”.
 - For the Purpose, choose “On Any”.
 - In the “When Approved By Route/Assign to” section, you would select “No One” to go in the top box and then “Howard Dude” for the bottom box. This would send all requests that aren’t custodial or electrical for Sloan High School to Howard. The system will try to find a route for the exact craft or location before going to a route for “On Any”.
 - If Howard would be the last person a non-electrical or non-custodial request would be sent to, click the **Stop Routing** box.

See below:

Add New

Location Building	Craft Purpose	When Approved By Route/Assign To Next	Stop Routing
Sloan High School	On Any	--No One--	
On Any	On Any	Dude, Howard	<input checked="" type="checkbox"/>

[Home](#) [Calendar](#) [New Work Order](#) [Reports](#) [Services](#) [Account Setup](#)



[Conditions of Use](#) | [Privacy Policy](#) | [Security Statement](#)

- Click **Add New** to save.

II. Manage Email Notifications: In this section of Account Setup, you can determine which automatic email notifications will go out to each user. Each role has a list of email notifications that you can choose from, all on one page:

Address http://www06.schoolde.com/toolbox/mydtwo/mydtwo_s/mydtWO_emailnotifications.asp Go Links

Reporting Assignments	Setup New Request Routing	Manage Email Notifications	Role Setup	
Copy Schema	MySchoolBuilding Setup Wizard	Start New Fiscal Year	ID About Combo	

Site Administrator I

- Send Site Administrator I Work Request Receipt Notification? [Sample](#)
- Notify of **NEW** Work Request? [Sample](#)
(Note: Site Administrator I are notified of ALL new requests only for the locations they serve primarily. See location setup for each Site Administrator I.)
- Notify Site Administrator I of Work Request Routed for approval or review? [Sample](#)
- Notify Site Administrator I of Work Request Change in Status? e.g. On-hold, Void, Duplicate Request, Waiting Parts, etc. [Sample](#)
- Notify Site Administrator I of Work Request Completion? [Sample](#)
- Notify Site Administrator I of Work Request Closure? [Sample](#)
- Send email notifications when Work Order has PM Purpose Code = **Preventive Maintenance?**
You don't have FS Purpose Code define to set this option, please click [here](#) to set it up.

Clerk

- Notify of **NEW** Work Request? [Sample](#)
(Note: All users setup as an Clerk will receive notification of ALL new work requests.)
- Notify Clerk of Work Request Routed for approval or review? [Sample](#)
- Notify Work Request Assignment? [Sample](#)
- Notification of Direct Reports Work Request Assignments? [Sample](#)
- Notify of Work Complete? [Sample](#)
(Note: All users setup as an Clerk will receive notification of ALL work completed.)
- Notify of Work Closure? [Sample](#)
- Send email notifications when Work Order has PM Purpose Code = **Preventive Maintenance?**
You don't have FS Purpose Code define to set this option, please click [here](#) to set it up.

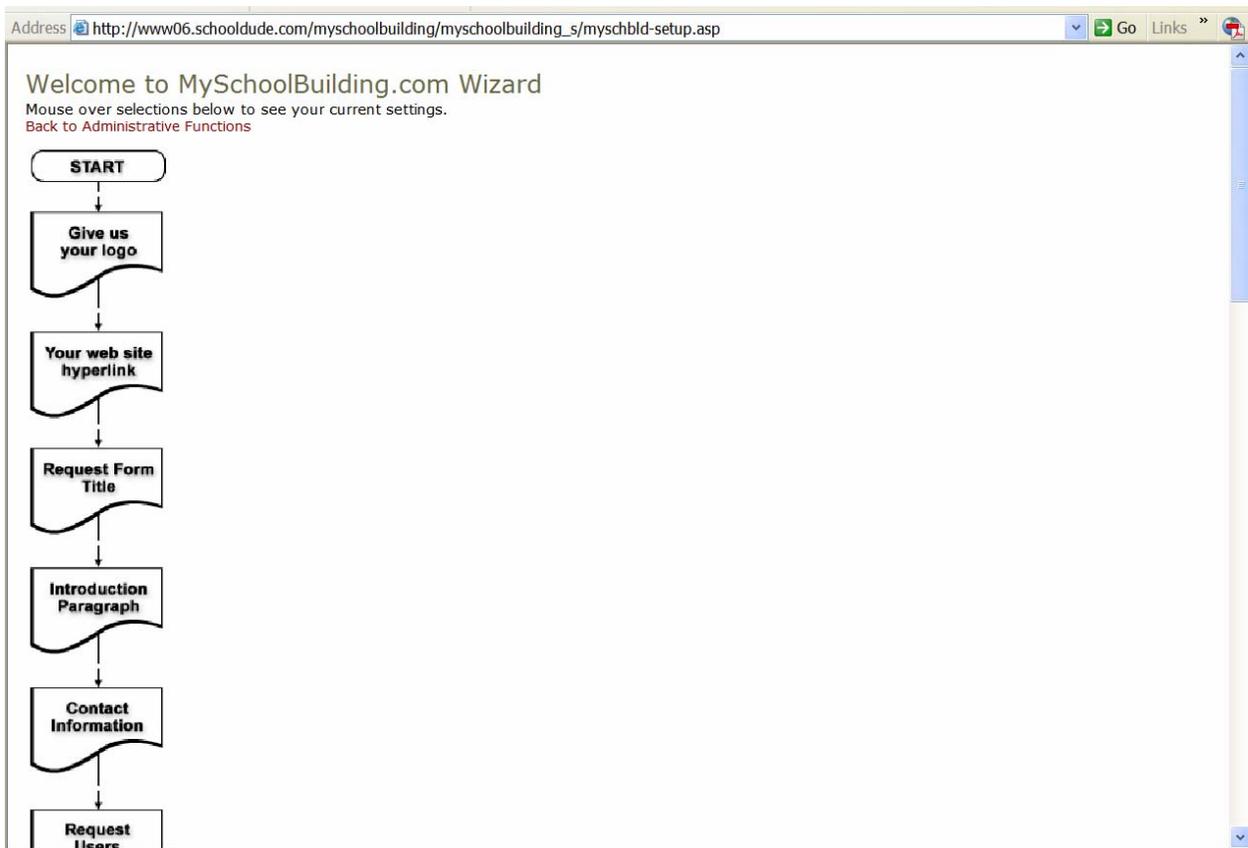
Requester

- Send Requester Work Request Receipt Notification? [Sample](#)

- To turn on an email notification, simply click the check-box next to its description, if that check-box is empty. If there is already a green check in the box and you wish to turn the notification off, click the box to remove the check.
- Go all the way through each Role's list and then click **Submit** at the bottom of the page to save.
- To reset email notification options, click **Reset**.
- When the page refreshes, you will be taken back to the top. Your options have been saved.

12. MySchoolBuilding.com Setup: This is where you set up the information and options for your educational facility on MySchoolBuilding.com, the site where Requesters go to make requests. This site is available to all MaintenanceDirect roles, but Requesters will go directly here to log in.

- To get started, click on the [MySchoolBuilding Setup Steps](#) link at the bottom of the **Account Setup** page, or choose the [Setup MySchoolBuilding Shortcut](#) at the top of the **Account Setup** page. Follow these steps:
- Once you click on the appropriate link, you will be taken to the MySchoolBuilding.com Setup Steps page, which looks something like this:



- To start the wizard, click the **Start** button on the flowchart. As you complete each step of the flowchart, you will automatically be taken to the next step in the flow chart when you click **Next Step**. To skip to any other step, click on that step in the flow chart.

- Follow through each step of the wizard until your **MySchoolBuilding.com** has been set up. You will be taken through the following:
 - ✓ **Set up your Organization Logo:** This will not only set the logo for your **MySchoolBuilding** page, but it will also set the same logo for your MaintenanceDirect account (it will display in the upper left-hand corner). Click the **Browse** button to find the logo you would like to display at the top of your **MySchoolBuilding** page. When you've chosen it, click **Add/Update Logo** and then **Next Step**. (Keep in mind that your logo will need to be a gif no larger than 150 x 50 pixels.)
 - ✓ **Your web site hyperlink:** This is used on **MySchoolBuilding** to provide a way for your requesters to get back to your web site. It is optional so if you don't have one, leave it blank.
 - ✓ **Request Form title:** Enter the title you would like for your Request form to have here.
 - ✓ **Introduction Paragraph:** Choose or write your introduction paragraph for **MySchoolBuilding** here. This will be the first thing that Requesters read upon entering **MySchoolBuilding.com**. You can write your own or choose from three available introduction options.
 - ✓ **Contact Information:** Your customers need to know who to contact in your department or organization in case of an emergency. Please indicate who they would call and their phone number (you can add as many as you need).
 - ✓ **Request Users:** List and add Requesters here.
 - ✓ **MySchoolBuilding Password:** Choose the password for **MySchoolBuilding.com** here.
 - ✓ **Budget Code/Selected Budget Codes for Requester:** Choose a default budget code from the budgets you entered earlier. Select the budget codes you wish for Requesters to see and use.
 - ✓ **Show/Hide Assigned To:** "Assigned To" is hidden on the My Requests listing for work orders. Decide whether or not you want to show "assigned to" information on the Requests page. Also, decide whether or not phone number and area/room number are required fields.
 - ✓ **Default Purpose Code/Selected Purpose Codes for Requester:** Select purpose codes you wish requesters to see and use.

- ✓ **Requested Completion Date:** Decide whether or not to hide requested completion date.
- ✓ **Select Craft Format:** Requesters will see craft selection as icons. You could keep this setting or choose “Combo List” instead.
- ✓ **Show/Hide Buildings:** Building information is hidden on the MySchoolBuilding work order request form. You can choose whether or not to show it.
- ✓ **Time Available for Maintenance:** Time available for maintenance is hidden on the MySchoolBuilding work order request form. You can choose whether or not to show it.
- ✓ **Email Us:** Enter the email address that you would like Requesters to use to contact you with questions/comments here.
- ✓ **Show/Hide Attachment:** Attach New File is hidden on the My Requests listing for work orders. You can choose whether or not to show it.
- ✓ **View Sample:** Gives you a link to click to view a sample of the page that requesters will see at MySchoolBuilding.com.

You’ve finished your MySchoolBuilding setup!

13. Purpose (Purpose Codes): Purpose codes provide a way that you can categorize work orders in order to simplify reports and keep up with what has been done and why. Simply put, a purpose code is the reason that is given for doing the work.

For example, “Vandalism” is a purpose code that is automatically provided to every account. By using this purpose code, you could then run a report to see how much you spent on vandalism in a given time period. Purpose codes are not required, but can go a long way to help with tracking work orders and organizing your records.

- To get started with entering purpose codes, simply click on the **Purpose** link from the Account Setup page. You will be taken to the My Purpose Codes page, which will look something like this:

The screenshot shows the 'My Purpose Codes' page. At the top, there are navigation tabs: Home, Calendar, New Work Order, Reports, Services, and Account Setup. Below the search bar, there are 'Purpose Shortcuts' with icons for 'Talk About It!', 'Suppliers', 'New', 'My Purpose Codes', 'Graph My Costs', and 'Print My Costs'. A legend explains that membership in CommunityDirect is required. A filtering section allows viewing purposes by letter (A-Z). The main table lists five purpose codes with their respective YTD costs. A footer contains navigation links and a note about calculations.

Purpose	Calendar YTD Costs*	Fiscal YTD Costs*
General Grounds	\$0.00	\$0.00
General Maintenance	\$0.00	\$0.00
Other	\$0.00	\$0.00
Preventive Maintenance	\$0.00	\$0.00
Vandalism	\$0.00	\$0.00

The My Purpose Codes page will already contain the purpose codes of “General Grounds”, “General Maintenance”, “Other”, “Preventive Maintenance”, and “Vandalism”. If there are other purpose codes you would like to add to this list, simply click the **+Add New Purpose** link (near the top, right-hand and bottom, left-hand corners of the Purpose Codes list) and follow these steps:

- In the Purpose Description box provided, enter the purpose code that you would like to create.
- Click **Submit**.

That's all there is to it! When you click "Submit", you will be taken back to the **My Purpose Codes** page, where you will see your new purpose code has been added.

14. Projects (Project Codes): Project Codes are another option intended to help simplify the reports process by further specifying the work being done. They provide a way to group several work orders together into a common project. Applying the same project code to each of the work orders allows you to run reports on how much all the various aspects (all the different work orders) related to a particular project cost. Like Purpose Codes, Projects are not required, but they can be very useful to the reporting process.

When you have a project to start, take the following steps to enter it into MaintenanceDirect:

- Click on the **Projects** link on the Account Setup page.
- You will be taken to the My Projects page, which will look something like this:

The screenshot displays the 'My Projects' page in the MaintenanceDirect system. At the top, there's a navigation menu with options like Home, Calendar, New Work Order, Reports, Services, and Account Setup. Below this is a search bar and a 'GO' button. The main content area is titled 'Project Shortcuts' and includes several links: 'Talk About It!', 'Suppliers', 'Account Setup Steps', 'New', 'My Projects', 'Graph My Costs', and 'Print My Costs'. A legend explains how to sort and filter projects. The 'My Projects' section shows '1 - 0 of total 0 listed' and a table with columns for Project ID, Description, Budgeted?, Date Opened, Date Closed, and Fiscal Year Costs. There are '+ Add New Project' links in the top right and bottom left of the table area. A footer contains 'Powered by: SCHOOL DUBE .com', navigation links, and an 'Email' button.

- Click the **+Add New Project** link (near the top, right-hand and bottom, left-hand corners of the My Projects list).
- Enter the Project Code you wish to use for this project.

- If you wish, enter the Project Description, the Open and Close dates, and whether or not this project is budgeted. You can also click in the check box provided if you would like to make the project inactive (one instance where you would do this would be if the project hasn't been started yet, but will be in the future).
- Click **Add/Update Record**.

That's it! You will automatically be taken back to the **My Projects** page, where you will see your new project listed.

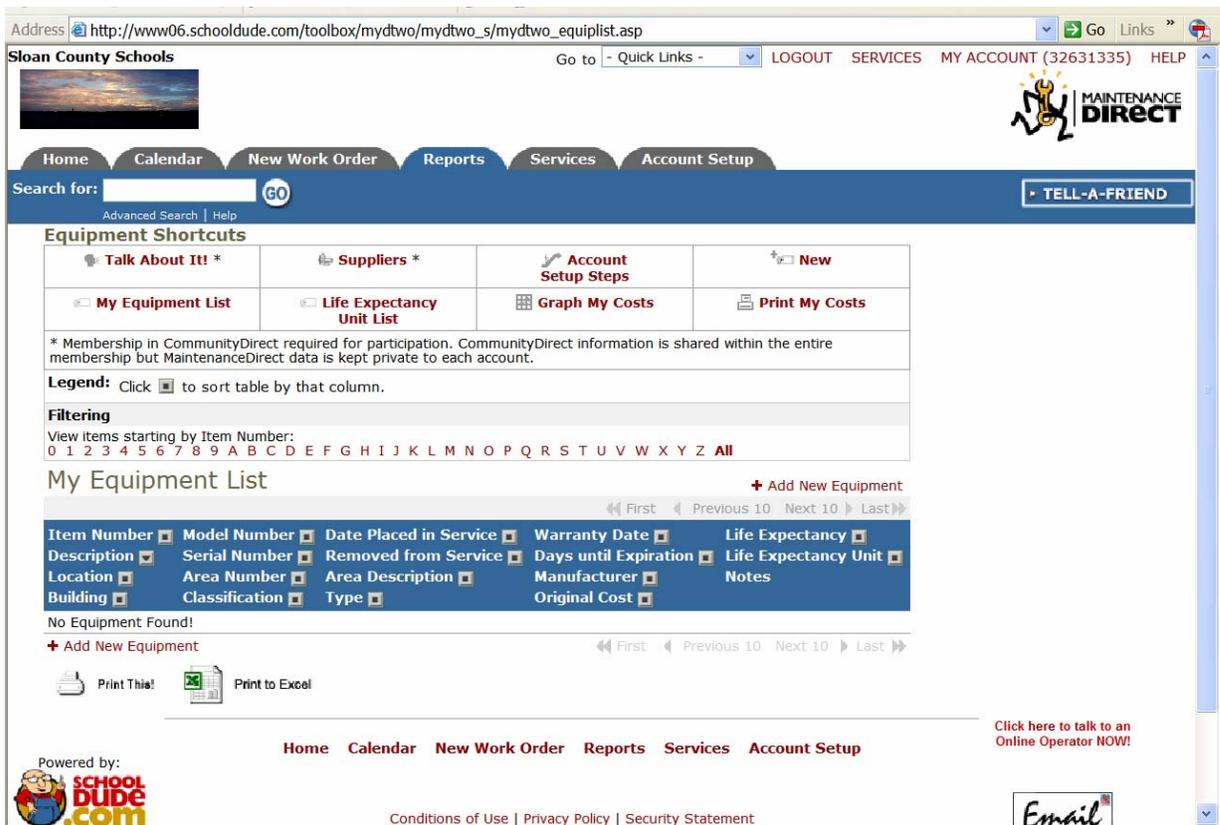
- On the My Projects list, a yellow thumbs-up (👍) next to the project name indicates that the project is used in MaintenanceDirect. To hide the project in MaintenanceDirect (if it is currently inactive until a future date, for instance), click on the yellow thumbs-up to change it to a gray thumbs-down (👎), which indicated that it's hidden.
- To edit/delete a project, simply click on that project's name on the **My Projects** page list. You will be taken to the **Add/Update Project** page, containing that project's information. Make any changes you wish to make and click the **Add/Update Record** button. If you would like to delete this project, simply scroll to the bottom of the page and click the **Delete Record** button.



SCHOOLDUDE SAYS: Once there are costs tied to a project, you will be unable to delete it.

15. Equipment: This is where you can list all of the equipment that your educational facility has for maintenance purposes. This way, you can keep up with what equipment you have, warranty information, when and where it's being used, and more. To start entering your equipment's information, take the following steps:

- On the Account Setup page, click on the **Equipment** link.
- You will be taken to the My Equipment List page, which will look something like this:



- On this page, click the **+Add New Equipment** link.
- You will be taken to the Add/Update Equipment page. Enter your equipment's information, including:
 - ✓ Item Number (required)
 - ✓ Classification
 - ✓ Type
 - ✓ Description
 - ✓ Manufacturer
 - ✓ Supplier
 - ✓ Date purchased
 - ✓ Original Cost

- ✓ Location
 - ✓ Building
 - ✓ Area
 - ✓ Area Number
 - ✓ Tag Number
 - ✓ Model Number
 - ✓ Serial Number
 - ✓ Out of Service Begin
 - ✓ Out of Service End
 - ✓ Date Placed
 - ✓ Date Removed
 - ✓ Warranty Expires
 - ✓ Life Expectancy Unit
 - ✓ Life Expectancy
 - ✓ Notes
 - ✓ Reading Measurement
 - ✓ Current Reading
 - ✓ Previous Reading
 - ✓ Usage Unit of Measure
- Be sure to decide whether or not to include any notes you've made on the work order form when it prints.
 - Click **Save**.

When the page refreshes, you will be taken back to the top of the **Add/Update Equipment** page, where you will see the words "New Equipment Saved Successfully!" in red near the top (see below).

* Membership in CommunityDirect required for participati
membership but MaintenanceDirect data is kept private to

Legend: **Indicates required information.**

Add/Update Equipment

New equipment saved successfully!

Item Number

*** Item Number is a primary so**

Repeat this process until all of the desired equipment has been entered.



SCHOOLDUDE SAYS: The next three sections (Classifications and Types) take managing your equipment a few steps further in that they are all ways that you can narrow down the fields for monitoring equipment used at your facility. They are optional but are there just to make things a little easier for you and those responding to work orders at your educational facility.

16. Classifications: Classifications are just a way of breaking down equipment by what it's used for. For instance, a classification could be "lawn equipment" or "HVAC".

To get started adding Classifications, do the following:

- Click on the [Classifications](#) link on the Account Setup page.
- On the My Classifications page, click on the [+Add New Classification](#) link.
- You'll be taken to the Add/Update Classification page, which looks something like this:

The screenshot shows a web browser window with the URL http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_classificationnew.asp?sortBy=descasc. The page header includes "Sloan County Schools" and "MAINTENANCE DIRECT". A navigation menu contains "Home", "Calendar", "New Work Order", "Reports", "Services", and "Account Setup". A search bar is present with a "GO" button and a "TELL-A-FRIEND" link. The main content area is titled "Add/Update Classification" and features a "Group" dropdown menu set to "-- Select Group --". Below this is a "Description" field with a checked checkbox and a "(max 255 characters)" label. An "Icon Image" section shows a current icon and options to "Browse..." or "Delete Icon". A "Submit" button is at the bottom of the form. The footer includes "Powered by: SCHOOL DUDE .com", "Conditions of Use | Privacy Policy | Security Statement", "Email" link, and copyright information: "Copyright © 1999-2001 SchoolDude.com, Inc. All Rights Reserved. Legal Stuff".

- Enter the Classification you would like to add into the Description field provided.
- If you have an icon you would like to use to mark this Classification, click the [Browse](#) button and add it. To delete an icon, just click the [Delete Icon](#) button provided.
- Click [Submit](#).
- You will automatically be taken back to the My Classifications page, which will show that your new classification has been added.

- To edit or delete a classification, simply click on the name of the classification on the **My Classifications** page. On the **Add/Update Classification** page, either make the desired change and click **Submit** or scroll down and click **Delete Record**.



SCHOOLDUDE SAYS: You will NOT be able to delete a classification once there are costs associated with it.

17. Types: Types are a way of further narrowing the classification of your equipment. For instance, if your classification is “Lawn Equipment”, then your type could be “Lawn Mower” or “Leaf Blower”.

To get started adding Types, do the following:

- Click the **Types** link on the **Account Setup** page.
- On the **My Types** page, click the **+Add New Type** link.
- You will be taken to the **Add/Update Type** page, which will look something like this:

The screenshot shows the 'Add/Update Type' page in the Sloan County Schools MaintenanceDirect system. The page is titled 'Add/Update Type' and features a form with the following fields:

- Classification:** A dropdown menu with the text '-- Select Classification --'.
- Description:** A text box with a character limit of 255 characters.
- Icon Image:** A field with a 'Browse...' button and a 'Delete Icon' button.

The page also includes a search bar, navigation tabs (Home, Calendar, New Work Order, Reports, Services, Account Setup), and a footer with contact information and a 'Tell-A-Friend' button.

- Select the Classification of the equipment.
- In the box provided, enter the new Type of equipment that you wish to add.
- If you have an icon you would like to use to mark this Type, click the **Browse** button and add it. To delete an icon, just click the **Delete Icon** button provided.

- Click **Submit**.
- You will automatically be taken back to the **My Types** page, which will show that your new type has been added.
 - To edit or delete a classification, simply click on the name of the classification on the **My Classifications** page. On the **Add/Update Classification** page, either make the desired change and click **Submit** or scroll down and click **Delete Record**.



SCHOOLDUDE SAYS: You will NOT be able to delete a type once there are costs associated with it.

18. Custom Category: If there is a category of information that you think should be noted or available for entry on all of your work orders that we don't have listed under the Manage Codes section, this is where you can create your own code. This way, you customize your work orders to require the information that you would like to have included.

To get started adding custom categories, do the following:

- Click on the **Custom Category** link on the Account Setup page.
- You will be taken to the Custom Category page, which will look like this:

The screenshot shows the Sloan County Schools MaintenanceDirect website. The address bar displays the URL: http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_customlist.asp. The page features a navigation menu with links for Home, Calendar, New Work Order, Reports, Services, and Account Setup. A search bar is located below the navigation menu. The main content area is titled "Custom Category Shortcuts" and includes a table with the following columns: Talk About It, Suppliers, Account Setup Steps, New, List Custom Category, Graph My Costs, and Print My Costs. Below the table, there is a message: "* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account." A legend indicates that clicking a square icon sorts the table by that column. A filtering section allows users to view custom categories starting by a letter or number (0-9, A-Z, All). The main table is titled "Custom Category" and has columns for Custom Category, Calendar YTD Costs, and Fiscal YTD Costs. A message below the table states "No Records Found!". There is a "+ Add New Custom Category" link and a "Print This!" button. The footer includes the SchoolDude.com logo, navigation links, and copyright information.

- Click the **+Add New Custom Category** link.
- On the Custom Category Add/Update page, enter your **Custom Category Description** in the space given.
- If you own PreventiveMaintenanceDirect and would like for this custom category to be displayed in it, click the check-box provided next to the words "Display in PMD".
- Click **Submit**.

You will automatically be taken back to the **Custom Category** page where you will see your new custom category has been added to the Custom Category list.

- To change or update a custom category's name or to change whether or not you would like for a custom category to be displayed in PMD, click that custom category's name on the Custom Category list, make the changes you wish to make on the **Custom Category Add/Update** page, and click **Submit**.
- To delete a Custom Category, click on that custom category's name on the Custom Category list and then click the **Delete** button at the bottom of the Custom Category Add/Update page.



SCHOOLDUDE SAYS: You will be unable to delete a custom category once there are costs attached to it.

19. Suppliers: This optional step in the Account Setup process allows you to keep track of all of the suppliers used by your educational facility when ordering equipment and supplies for various projects.

To start adding suppliers, follow these steps:

- On the Account Setup page, click on the **Suppliers** link.
- On the My Suppliers page, click the **+Add New Supplier** link.
- You will be taken to the New Supplier page, which will look like this:

The screenshot shows a web browser window with the URL http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_suppliernew.asp. The page header includes 'Sloan County Schools' and 'MAINTENANCE DIRECT'. The navigation menu contains 'Home', 'Calendar', 'New Work Order', 'Reports', 'Services', and 'Account Setup'. A search bar is located below the menu. The main content area is titled 'Supplier Shortcuts' and includes links for 'New Supplier', 'My Suppliers', and 'Print My Suppliers'. A legend indicates that a checked box indicates required information. The 'Quick Navigation' section shows 'Supplier Information' as the current page. The 'New Supplier' section is titled '1. Supplier Information' and contains the following form fields:

- Organization Name
- Address
- Notes

Buttons for 'Next Step' and 'Delete' are located below the form fields. The footer includes a 'Powered by: SCHOOL DUDE .com' logo, a navigation menu, and contact information: 'Conditions of Use | Privacy Policy | Security Statement', 'LOGIN SERVICES MY ACCOUNT (32631335) HELP', and 'Need help? Call us 1-877-868-DUDE (3833)'. A copyright notice for 2009-2011 SchoolDude.com is also present.

- Enter the **Organization Name** (the name of the supplier) here.
- If you have the Supplier's address, enter it here.
- Include any notes you wish to include in the field provided.
- Click **Next Step**.

- If you would like to create a department name (if specifying a particular department of your supplier is necessary), enter the name, address, phone, fax, and/or any notes here. If you want, you can choose to skip this step.
- Click **Next Step**.
- If you wish to enter your supplier's web site information, do so here. You may also choose to skip this step if you wish.
- Click **Next Step**.
- Define Contacts: Enter the first and last name of your contact at this supplier and provide any other contact information you wish to include (department, phone, fax, cell, email, notes, etc.) To add more than one contact, click Add after filling in the first contact's name and information.
- Click **Next Step**.
- Create New Note: Enter any further notes you wish to include on this supplier. You may skip this step, if you wish.
- Click **Next Step**.
- Payment/Billing Information: Enter your supplier's billing information here (Payment Terms (add Payment Terms by clicking the Add/Edit Terms link provided), Delivery Terms, Federal ID#, Credit Limit, Minimum Order Amount, Surcharge, and whether or not they are active).
- **Click Submit**.
- You will be taken back to the **My Suppliers** page, which will show your newest supplier has been added.
 - To update supplier information, click on that supplier's name in the **My Suppliers** list. Proceed through the steps above, making the desired changes to your supplier's information and click **Submit** when finished.
 - To delete a supplier once it's been added and before any costs are tied to it, simply click on that supplier's name in the My Supplier list. In the first "Update Supplier" step, click the **Delete** button at the bottom of the page, beneath the Notes field. A gray confirmation box will appear to make sure that you want to delete the supplier. Click **OK**. You will then be taken back to the **My Suppliers** page, which will show that the supplier has been deleted.



SCHOOLDUDE SAYS: Keep in mind that you will NOT be able to delete a supplier once you have costs associated with it.

20. Manufacturers: In this section, you can enter the information of any equipment manufacturers that your educational facility uses. This, like the Suppliers section, is optional, but comes in handy when running reports.

To get started adding Manufacturers, do the following:

- Click on the **Manufacturers** link on the Account Setup page.
- On the My Manufacturers page, click on the **+Add New Manufacturer** link.
- You will be taken to the New Manufacturer page, which will look like this:

The screenshot shows a web browser window with the address http://www06.schoolde.com/toolbox/mydtwo/mydtwo_s/mydtwo_manufacturernew.asp. The page is for 'Sloan County Schools' and is part of the 'MAINTENANCE DIRECT' system. The main content area is titled 'New Manufacturer' and contains the following form fields:

- Manufacturer Name** (required information)
- This is your current logo, change it below.
- Logo Image** If you don't have a logo to use, please select from our [logo library](#).
- Library Icon**
- This logo image is used if you do not define one.
- Notes**
-

At the bottom of the page, there is a navigation menu with links for Home, Calendar, New Work Order, Reports, Services, and Account Setup. A 'Powered by: SCHOOL DUDE' logo is in the bottom left, and a 'Click here to talk to an Online Operator NOW!' link is in the bottom right.

- On this page, enter the **Manufacturer Name** in the field provided (this is the only required information).
- If you like, browse and enter the Logo Image, Library Icon, and/or any notes you would like to include.
- Click **Next Step**.

- Enter the Manufacturer's Department Name.
 - Include the Department's address, phone number, fax, and any notes you wish to include, if available.
 - Click **Save**.
 - Then, click **Next Step**.
 - Enter the Web Site information of the Manufacturer, including the Department, Web Site Description, and Web Site URL.
 - Click **Next Step**.
 - Define Contacts: Enter your contact information for this Manufacturer, including First and Last Name, Department, Phone, Fax, Email, etc.
 - To add more contacts, click the **Add** button and repeat the last step.
 - To finish up, click the **Finish** button.
 - You will be taken back to the **My Manufacturers** page, which will show that your newest manufacturer has been added.
-
- To update manufacturer information, click on that manufacturer's name in the My Manufacturers list. Proceed through the steps above, making the desired changes to your manufacturer's information and click **Submit** when finished.
 - To delete a manufacturer once it's been added and before any costs are tied to it, simply click on that manufacturer's name in the My Manufacturers list. In the first "New Manufacturer" step, click the **Delete** button at the bottom of the page, beneath the Notes field. A gray confirmation box will appear to make sure that you want to delete the manufacturer. Click **OK**. You will then be taken back to the **My Manufacturers** page, which will show that the manufacturer has been deleted.



SCHOOLDUDE SAYS: Keep in mind that you will NOT be able to delete a Manufacturer once you have costs associated with it.

21. Copy Schema: Below is a shot of the Copy Schema page:

The screenshot shows a web browser window with the address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_copyschema.asp. The page is for Sloan County Schools and features a navigation menu with links for Home, Calendar, New Work Order, Reports, Services, and Account Setup. A search bar is present with a 'GO' button. The main content area is titled 'Administrative Shortcuts' and contains a grid of links for various system functions, including 'Copy Schema'. Below this is the 'Code Schema Definition' section, which asks the user to select a code schema from a list of radio buttons: UniFormat II, CSI, NJAC 6:24, DE/DOE, SISC, NMGCT, and 'Create my own'. A 'Submit' button is located below the list. The footer includes the SchoolDude.com logo, a navigation menu, and a link to contact an online operator.

This is the page that you fill out to copy your schema into your MaintenanceDirect account.



SCHOOLDUDE SAYS: Once you copy a schema into your account, it will be difficult to undo so please make sure that you want that particular schema.

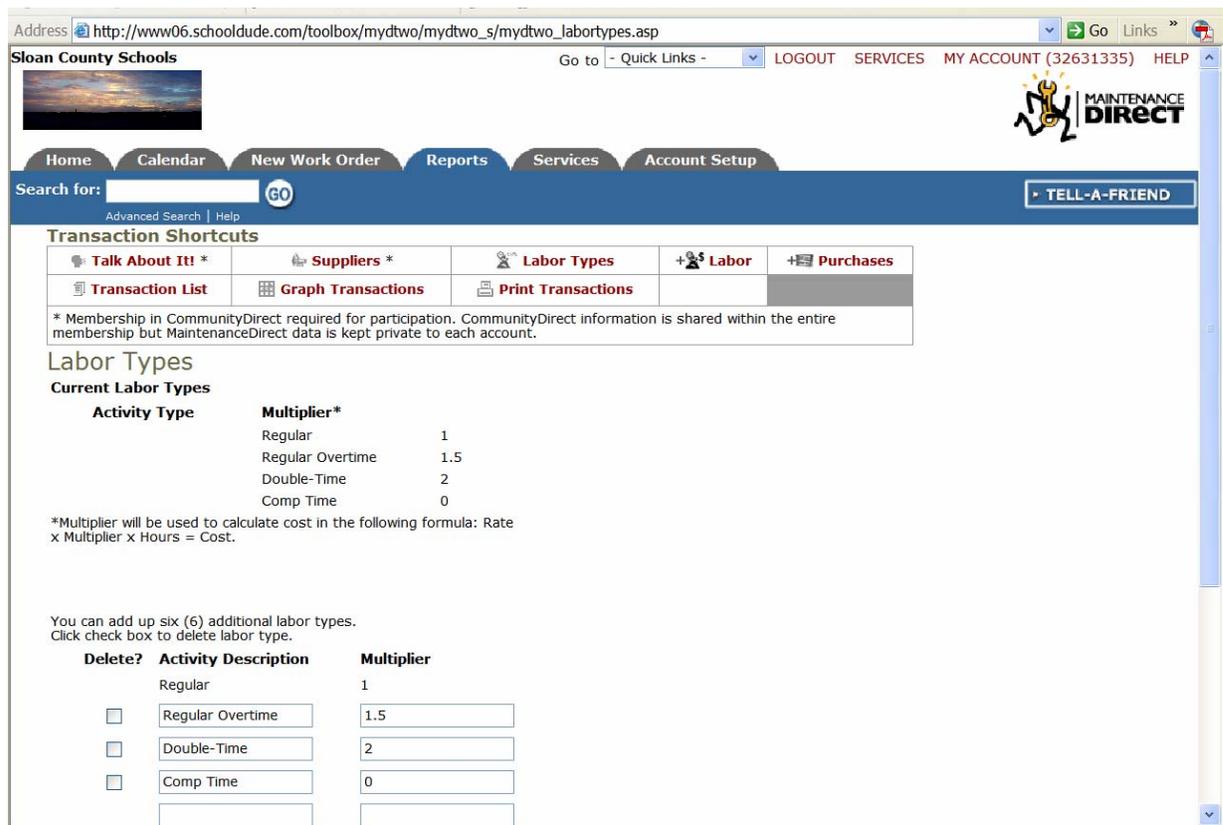
If you choose to use a pre-defined schema, you can still add, modify, and delete to customize groups, classifications, and types. You will not be limited to the schema that is copied.

- To view an example of each schema, click on the **View Code List** link provided in parenthesis next to each Code Schema. **DON'T** click the empty buttons to the left of each Code Schema—click those only when you wish to select that schema for use.
- To copy a schema, click the empty button to the left of it and then click **Submit**.

22. Labor Types: Labor types are the multipliers that you use to calculate labor costs. The most common Labor Types and cost multipliers are provided for you, but you can add your own as needed.

To get started, follow these steps:

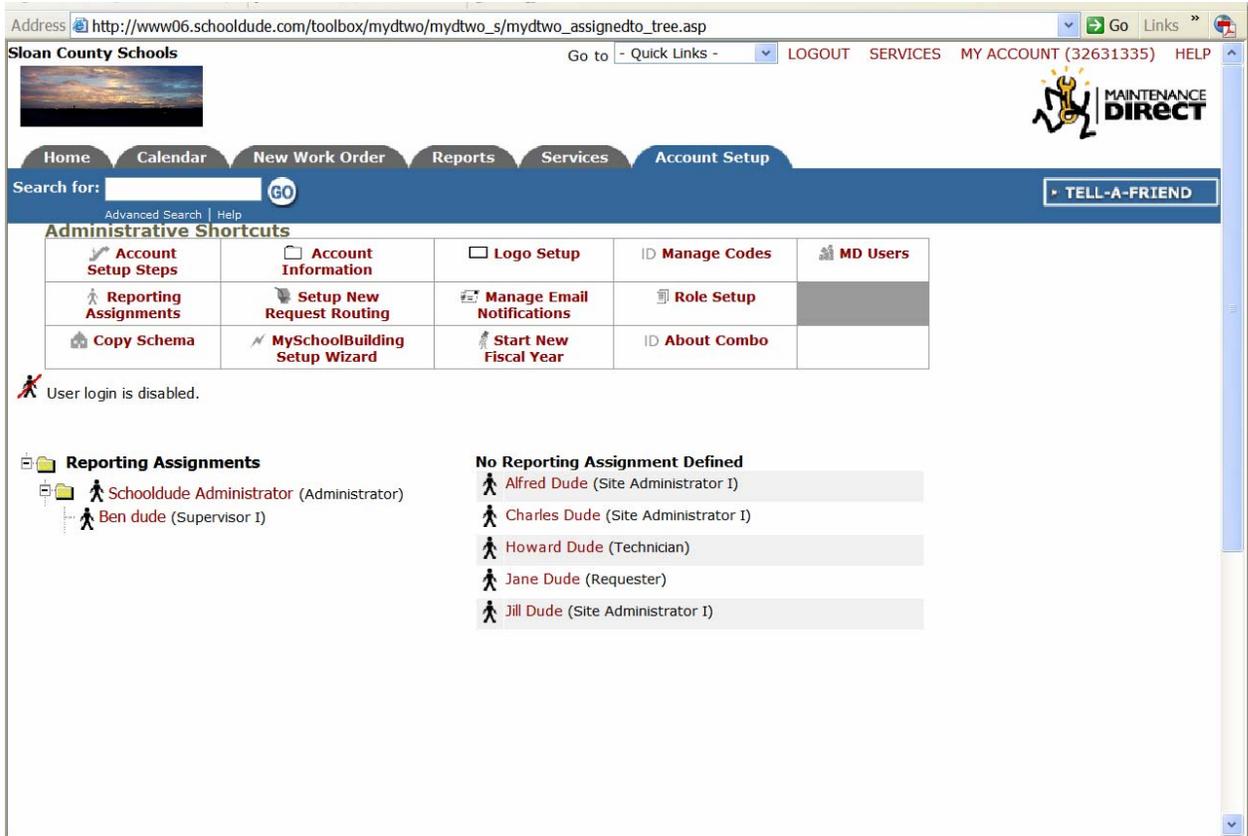
- Click the **Labor Types** link on the Account Setup page.
- You will be taken to the Labor Types page, which will look something like this:



- On the Labor Types page, you will see the current labor types listed: Regular, Regular Overtime, Double-Time, and Comp Time.
- Beneath those, you are given the option of deleting any of them. If you wish to do so, simply click the check-box next to the Labor Type you wish to delete, beneath the word “Delete?”
- If you wish to add a Labor Type, do so now by entering the description in the box provided, as well as the multiplier.

- When you have made the additions that you want and/or selected the Labor Types that you wish to delete, click the **Save Changes** button.

23. Reporting Assignments: Below is a shot of the Reporting Assignments page:



This page will display all users that have people who work below them that have direct reports. They will be listed in a “tree-type” format. Any user with a slash through their icon is a disabled user and they cannot log into the system.

Any users not reporting to anyone will be listed on the right-hand side. You can click on any user to take you to that person’s participant information.

24. **Priority:** This page simply displays the different levels of priority in MaintenanceDirect, their Calendar YTD costs, Fiscal YTD costs, and Location Analysis, based on work orders requested and information entered into MaintenanceDirect over time.

The screenshot shows the MaintenanceDirect web application interface. At the top, the address bar displays the URL: http://www06.schoolsde.com/toolbox/mydtwo/mydtwo_s/mydtwo_prioritylist.asp. The page header includes the Sloan County Schools logo and navigation links: Home, Calendar, New Work Order, Reports, Services, and Account Setup. A search bar is present with a 'GO' button and a 'TELL-A-FRIEND' link.

The main content area is titled 'Priority Shortcuts' and includes several options: Talk About It!, Suppliers, My Priority Codes, Graph My Costs, and Print My Costs. A note states: '* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.' A legend indicates that clicking a column header sorts the table by that column.

The 'Filtering' section allows users to view priorities starting by a letter, with options: A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z, and All.

The 'My Priorities' section shows 1 - 6 of total 6 listed. Below is a table with the following data:

Priority	Calendar YTD Costs*	Fiscal YTD Costs*	Location Analysis
Emergency	\$0.00	\$0.00	Expenditures
High	\$0.00	\$0.00	Expenditures
Low	\$0.00	\$0.00	Expenditures
Medium	\$0.00	\$0.00	Expenditures
Safety	\$0.00	\$0.00	Expenditures
Scheduled	\$0.00	\$0.00	Expenditures

A note at the bottom of the table states: '*Calculations shown on this page represent costs through yesterday. For up-to-date calculations use "Print My Costs" options.' A 'Print This!' button is located to the left of this note.

The footer includes the text 'Powered by: SCHOOL' and navigation links: Home, Calendar, New Work Order, Reports, Services, and Account Setup. A link to 'Click here to talk to an Online Operator NOW!' is also present.

**Congratulations! Your Account Setup is complete.
(Whew!)**

III. Entering New Work Orders: MD in Action.

Now that you've got your account set up, we'll take a look at how to enter your own work orders. You'll go through the work order request process, step by step, so that you can not only see how it works, but also see where all the information that you entered during the Account Setup process comes into play. Below, you will see a shot of what the New Work Order page looks like, once you've clicked on the **New Work Order** tab at the top of your MaintenanceDirect page:

The screenshot shows the MaintenanceDirect interface for entering a new work order. The page title is "Sloan County Schools" and the URL is "http://www06.schoolde.com/toolbox/mydtwo/mydtwo_s/mydtwo_wouupdate.asp?n=1". The navigation bar includes "Home", "Calendar", "New Work Order", "Reports", "Services", and "Account Setup". The "New Work Order" tab is selected. Below the navigation bar is a search bar and a "Work Order Shortcuts" table. The "Work Order Shortcuts" table includes links for "Talk About It!", "Suppliers", "New", "Short WO Form", "Request Info", "Contact Info", "Assignment Info", "Budget Info", "Deferral", "Action Taken", "Messages", "Journal Notes", "Transactions", "Approval Routing", "Attach File", "Print Form", "Print Details", and "PM Schedule". Below the shortcuts is a legend indicating that a checked box indicates required information and a pencil icon indicates automatic saving. The main form area is titled "Work Order: NEW" and contains fields for "Status", "Priority", "Status Date", "Created By", "Date Created", "Location", "Building", "Area", and "Area Number".

As the Administrator of your account, you not only have the ability to create new work orders, you will also see every work order for your educational facility in the MaintenanceDirect system. You can make changes to them, update their status, and make sure they get where they need to go.



SCHOOLDUDE SAYS: Keep in mind that in MaintenanceDirect, work order ID numbers (WOID's) ALWAYS start with 100.

To get started making a new work order of your own, follow the steps below, keeping in mind that indicates a required field:

- **Status:** Choose the status you would like from the drop-down box provided.
- **Priority:** Choose the priority of your work order (Low, Medium, High, Emergency, Safety, and Scheduled).
- **Status Date, Date Last Printed, Created By and Date Created** will all display in this section. **Status Date** is the date that the status was last changed. **Date Last Printed** is the date of the last time a printable version was created by our system. **Created By** lists the user who initially created the work order. **Date Created** is the date that the work order was initially created.
- **Request Info:** Enter your **Location, Building, Area, Area Number, Request Date,** and **Request Description**. If the priority selected for the work order was “emergency”, the Emergency check box will show as already checked here.
- **Deferral:** If you would like to defer this work order until a later time, you may enter the **New Due Date, Deferred By** and the **Deferral Reason** in the corresponding fields provided. For example, you may receive a request to paint a room and you want to complete the work order over Spring Break, when no students will occupy the room. You can change the work order’s status to “On Hold” and designate a reason under the **Deferral** section.
- **Contact Info. :** In this section, the person making the request should fill in their contact information in the fields provided (First Name, Last Name, Email, Phone, Pager, and Cell Phone). If this were a work order that you were receiving to approve, the requester’s contact information would already be filled in, in this section.
- **Assignment Info. :** Select the user assigned to the work order from the drop-down box provided. If this is a new request and you are routing to the person for approval, check the **Route for Approval or Review** option.
- Enter the **Target Start** and **Completion dates**, as well as the **Requested Completion Date** and/or the **Actual Completion Date**.
- Enter the **Estimated Costs** and **Estimated Hours**. As you enter transactions into the system, **Actual Costs, Actual Hours, and Total Costs** will display underneath for comparison.
- **Budget:** Choose the **Purpose** of the request from the drop-down box provided. The purpose is generally *why* you are performing the work order. For example, if it is a work order for removing graffiti from a wall, the purpose would be “vandalism”.

- Choose the Craft for the request from the drop-down box provided.
- Select the Budget Code, Custom Category, and Project from their corresponding drop-down boxes.
- If this work order is to be performed using an item in the Equipment list, you can choose the item from the Equipment drop-down box. If this is a not a new work order but is a PM work order that you are approving, you will also see a Classification and Type selected.
- Click **Save** at the bottom of the page.

You're halfway there!

Once you click Save, the next page you see will look something like this:

The screenshot shows the MaintenanceDirect interface for Sloan County Schools. At the top, there is a navigation bar with links for Home, Calendar, New Work Order, Reports, Services, and Account Setup. Below this is a search bar and a 'TELL-A-FRIEND' button. The main content area features a 'Work Order Shortcuts' table with various actions like 'Talk About It!', 'Suppliers', 'New Duplicate this WO', 'Short WO Form', 'Request Info', 'Contact Info', 'Assignment Info', 'Budget Info', 'Deferral', 'Action Taken', 'Messages', 'Journal Notes', 'Transactions', 'Approval Routing', 'Attach File', 'Print Form', and 'Print Details'. A legend indicates that a checked box means 'Indicates required information' and a pencil icon means 'Automatically saves on click.' Below the shortcuts, a message states: 'Work Order: 100' and 'Work Order saved successfully!' in red text. A red arrow points to this message. The 'Status' is set to 'New Request' and 'Priority' is 'Low'. Other details include 'Status Date: 11/7/2005 10:12:32 AM', 'Created By: Schooldude Administrator', and 'Date Created: 11/7/2005 10:12:32 AM'. The 'Request Info' section shows the 'Location' as 'Sloan Community College'.

The top half of the page will look just like the page you just filled out, only the words “**Work Order Saved Successfully!**” will appear in red, just under the new work order number (in this case, 100). See red arrow above.

To continue filling in further details for the work order, scroll about halfway down the page to the new section, which starts with **Action Taken**. It will look like this:

The screenshot shows a web application interface with several sections. At the top, there are two dropdown menus: "<-- Select Classification -->" and "Type <-- Select Type -->". Below these are links for "Back to Shortcuts".

The **Action Taken** section has a header and a text input field.

The **Message Center** section has a header, a "New Message" link, and a message box with the text "Click on a Message to Reply".

The **Journal Notes** section has a header, a "New Note" link, and a table with the following content:

Date	Journal Note
	No Journal Notes at this time

The **Transactions** section has a header, links for "New Purchase Transaction" and "New Labor Transaction", and a message box that says "No Transactions for this Work Order yet.".

The **Approval Routing** section has a header and a table with the following content:

Date	Approved?	By	Routed To
11/7/2005 10:12:32 AM	System Route	Schooldude Administrator	

- If you are approving a work order that has been entered by a requester, enter the **Action Taken** for this work order here. The requester will then be able to view this information when checking the work order's status.
- **Message Center:** This section will allow you to send an email message regarding the work order to anyone in the system. It will also show email notifications sent out from our servers. To enter a new message, click the **New Message** link.
- **Journal Notes:** This section allows you to post journal notes regarding the work order. You also have the option of sending out a reminder email for the journal note. To create a new journal note, click the **New Note** link.
- **Transactions:** From this section, you can add and edit Labor and Purchase Transactions. If you have InventoryDirect, you will also be able to add and edit Issue Transactions. Transactions will be discussed in more detail in the next section of this manual.
- **Approval Routing:** This section displays all the routes the work order has taken for approval.

- **File Attachments:** You can attach up to two files to each work order. Keep in mind that they must be 3MB or less each.
- Click **Save**. Or, to clear the work order of all changes you just made, click **Reset**.

➤ Once your work order has been saved, it will show up in the **WORK ORDERS BY STATUS** section of the **Home** page. If this is your first work order, you will now see a pie graph displayed in this section of the **Home** page as well. See below:

The screenshot displays the Sloan County Schools Maintenance Direct interface. The main content area is titled "WORK ORDERS BY STATUS" and features a "Last 10 Work Requests" dropdown menu set to "All". Below this is a "Request Totals" section with a list of status categories and their counts: 1 New Request (checked), 1 UNASSIGNED, 0 In Approval Process, 0 Work In Progress, 0 Complete, 0 Closed Work Orders, 0 Declined, 0 Parts on Order, 0 Duplicate Request, 0 Void, 0 On Hold, 0 Waiting More Information, 0 Open Extended, 0 Pending, 0 Waiting Funding, 0 Deferred, and 0 Forwarded. A 3D pie chart titled "Work In Process" shows a single green slice representing the "New Request" status. A "Refresh Pie" button is located below the list. The right sidebar contains a "WORK CENTER" section with a calendar, weather, and assigned work counts, and an "Information Analysis" section with a list of categories.

➤ As work orders are added, edited, and routed, they will show up in the **WORK ORDERS BY STATUS** section of the **Home** page, based on their current status. To view work orders that hold a particular status, simply click on the number next to the status label you wish to view.

IV. Entering Labor and Purchase Transactions: How Much Was That Again?

The cost of a work order comes from the labor and purchase transactions attached to it. To track those costs without having to chase down receipts, simply enter them into MaintenanceDirect as you get them and our system will organize them for you so that you'll always know exactly how much a work order costs and why. You've got all the answers.

In MaintenanceDirect, transactions can be entered in two ways. The first of those that you will mostly likely encounter will be the Transactions section of the work order itself. The second way is to use the link provided on the Home page itself. We'll cover each method separately in this section.

Method 1:

As you saw in the previous section, the second page of a work order contains a Transactions section where you can click one of two links:



Clicking on the **New Purchase Transaction** link on the work order form will take you to the following page where you can enter and save all of the purchase transaction information for the current work order. See below:

Address http://www06.schoolsde.com/toolbox/mydtWO/mydtWO_s/mydtWO_transaction_new.asp?WOID=101 Go Links

Search for: GO TELL-A-FRIEND

Advanced Search | Help

Transaction Shortcuts

Talk About It! *	Suppliers *	Labor Types	Labor	Purchases
Transaction List	Graph Transactions	Print Transactions		

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend: **Indicates required information.**

Purchases [Back to WOID 101](#)

Work Order: 101

Search WOID

Description	Air conditioning unit is out in the weight room.
Location	Sloan High School
Status	New Request
Assigned To	Ben dude

Trns Date

Type

Select Supplier or type new one below.

Supplier

Invoice/PO #

Budget Code

Purchased by

Description

Quantity

Clicking on the **New Labor Transaction** link on the work order form will take you to the following page, where you can enter and save labor transaction information for this particular work order. See below:

The screenshot shows the 'Work Order Labor Entry for dude, Ben' page in the Sloan County Schools Maintenance Direct system. The page includes a navigation menu with links for Home, Calendar, New Work Order, Reports, Services, and Account Setup. A search bar is present at the top. The main content area features a calendar for November 2005 with input fields for hours and overtime (OT) for each day. A 'Grand Total Hours' section is also visible. The page is powered by School Dude.com and includes a footer with links for Conditions of Use, Privacy Policy, and Security Statement.

- If you need to account for overtime, comp time, holiday time, or any other time, you can click on OT (“Other Time”) next to the corresponding date. A window will appear for you to enter in any other times.

Method 2:

The second way to enter purchase and labor transactions into MaintenanceDirect is through the link provided on the **Home** page. This method would probably be most useful to someone in the clerk role who may be entering purchase transactions by going through a stack or list of invoices. It provides a faster, more streamlined way to enter transactions into MaintenanceDirect.

To get started, take a look at the **Information Analysis** section of the **Home** page. As was mentioned earlier in the **Home** page discussion at the beginning of this manual, the **Information Analysis** section is a quick source for locating and managing all the information pertaining to work orders within MaintenanceDirect. To work within Transactions, click on the **Transactions** link here.

The Transactions page will look something like this the first time you visit:

Address: http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_transactionlist.asp

Sloan County Schools

Go to: Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP

Home Calendar New Work Order Reports Services Account Setup

Search for: GO

Advanced Search | Help

TELL-A-FRIEND

Transaction Shortcuts

Talk About It! *	Suppliers *	Labor Types	Labor	Purchases
Transaction List	Graph Transactions	Print Transactions		

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend: Click to sort table by that column.

Filtering
View transactions starting by WOID:
0 1 2 3 4 5 6 7 8 9 All

Transaction List

1 - 0 of total 0 listed

WOID <input type="checkbox"/>	Transaction Description <input type="checkbox"/>	Date <input type="checkbox"/>	Qty <input type="checkbox"/>	Rate <input type="checkbox"/>	Cost <input type="checkbox"/>
Status <input type="checkbox"/>	Supplier <input type="checkbox"/>	Type <input type="checkbox"/>			
Description <input type="checkbox"/>					
No transactions in record.					

Print This!

*Calculations shown on this page represent costs through yesterday. For up-to-date calculations use "Print Transactions" options.

Home Calendar New Work Order Reports Services Account Setup

Powered by:

Conditions of Use | Privacy Policy | Security Statement

LOGIN SERVICES MY ACCOUNT (32631335) HELP

Click here to talk to an Online Operator NOW!

Email

New Purchases: (Keep in mind that = required field.)

- Click on the **Add New Purchases** link on the Transaction List page, located on the right-hand side (see arrow above).

You will be taken to the Purchases page, which will look something like this:

Parts & Supplies Indicates required field.
 Note: Actual completion date will default to today's date when it is marked as complete.
 % Markup % Discount (ALT+7) on all parts and supplies
 (Note: If no discount or markup, please leave blank. When used, the original cost is automatically adjusted and saved.)

WOID **Supplier** (ALT+1) or **New Supplier** (ALT+9) Note: Type a new supplier in the "New Supplier" box.
Date (ALT+D) **Type** (ALT+Y) **Item Description** (ALT+I) **Budget** (ALT+B)
Invoice/PO # **Work Order Complete?** **Qty** **Unit Cost** **Tax** **Shipping** **Other** **Total Cost**
Purchased By (ALT+3) **Actual Completion Date** **Action Taken**

Invoice/PO #	Purchased By	Date	Supplier	Type	Item Description	Qty	Unit Cost	Tax	Shipping	Other	Total Cost
<input type="text"/>											
<input type="text"/>											

- As you can see by scrolling down this page, you can add multiple purchases at a time by filling in the information for each separate purchase in the fields provided.
- **WOID = Work Order ID:** Enter the work order number here to indicate which work order that this purchase pertains to.
- **Date:** Enter the date that the purchase was made.
- Enter the **Invoice/PO Number**.
- **Purchased By:** Select the name of the person who made the purchase from the drop-down box provided.
- Select the **Supplier** from the drop-down box provided OR enter a **New Supplier**.

- Select the Type.
- **Work Order Complete?** : Indicate whether or not the work order is complete using the check-box provided.
- Actual Completion Date
- Item Description
- Quantity
- Action Taken
- Budget
- Unit Cost
- Tax
- Shipping
- Other
- Total Cost
- Click **Save**.

➤ After you've entered your purchase information, purchases will show listed in the **Purchases** section at the bottom of this page.

Labor Hours:

- Click on the **Add Labor Hours** link on the Transactions page.
- You will be taken to the Labor Hours page, which will look like this:

The screenshot shows the Sloan County Schools Maintenance Direct web application. The browser address bar displays the URL: http://www06.schoolsde.com/toolbox/mydtWO/mydtWO_s/mydtWO_generalLabor.asp. The page header includes navigation links for Home, Calendar, New Work Order, Reports, Services, and Account Setup. A search bar is present with a 'GO' button and a 'TELL-A-FRIEND' link. The main content area features a 'Transaction Shortcuts' table with various options like 'WO List', 'New Work Order', 'Work Order Short Form', 'Work Order Long Form', 'Parts & Supplies', 'Labor Hours', 'Print Detailed WO Report', 'Print WO Form', and 'Print Transactions'. Below this is the 'Labor Hours' section, which includes a note about the actual completion date defaulting to today's date. The main table has columns for WOID, Employee, Type, Work Order Complete?, Date, Actual Completion Date, Hours, and Total Cost. The first row is pre-filled with 'Administrator, Schooldude' as the employee and 'Regular' as the type.

WOID <input checked="" type="checkbox"/>	Type (ALT+Y)	Date (ALT+D) <input checked="" type="checkbox"/>	Hours	Total Cost
<input type="text"/>	Regular	<input type="text"/>	<input type="text"/>	<input type="text"/>
Administrator, Schooldude	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	Regular	<input type="text"/>	<input type="text"/>	<input type="text"/>
-- Select Employee --	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	Regular	<input type="text"/>	<input type="text"/>	<input type="text"/>

- As you can see by scrolling down this page, you can add multiple labor transactions at a time by filling in the information for each in the fields provided.
- **WOID:** Enter the work order ID number here to indicate which work order that this labor pertains to.
- **Employee:** Indicate here, by selecting from the drop-down box provided, which employee performed this labor.
- **Type**
- **Work Order Complete?**
- **Date**
- **Actual Completion Date**

- Hours
- Total Cost
- Action Taken

V. Processing and Assigning New Requests: Any Volunteers?

As you've learned, when someone makes a work order request, the initial status of the request is "New Request". New Requests have two subcategories: "Unassigned" and "In Approval Process" (the numbers next to these on the Home page don't necessarily have to add up to the number next to "New Requests"). Unassigned work orders, which can be viewed in the **WORK ORDERS BY STATUS** section of your Home page (see screen shot below), are just what you think—those with no assignment at all. However, they can also be those that are assigned to you to be reassigned.

Any work order that is "In Approval Process" has been routed to another user for approval so you don't have to worry about it at this point.



SCHOOLDUDE SAYS: Clicking on the number next to "New Requests" will NOT take you to the Work Order Summary List (which shows all work orders in handy-dandy list format). Instead, it will take you to the work order form of the OLDEST of the New Requests that have been entered. In order to reach each of the New Requests at this point, you will have to click on the **Unprocessed New Requests drop-down box** provided and select the New Request you wish to view from the list that will drop down.



SCHOOLDUDE SAYS: A New Request's status determines whether or not you can or should deal with it at this point. In other words, if it's "In Approval Process", it has currently been routed to another user for approval and therefore, isn't yours to deal with yet. If it's "Unassigned", however, you can go ahead and process it, assigning it to whoever needs to handle it at the time. For this reason, we recommend avoiding clicking on the number next to "New Requests". Instead, go straight to "Unassigned" to handle those work orders that need direction.

To process your new (unprocessed) requests and assign those that are unassigned, do the following from the Home page:

The screenshot displays the Sloan County Schools Maintenance Direct interface. The 'Request Totals' section is as follows:

Status	Count
<input checked="" type="checkbox"/> New Request	2
<input type="checkbox"/> UNASSIGNED	1
<input type="checkbox"/> In Approval Process	1
<input type="checkbox"/> Work In Progress	0
<input type="checkbox"/> Complete	0
<input type="checkbox"/> Closed Work Orders	0
<input type="checkbox"/> Declined	0
<input type="checkbox"/> Parts on Order	0
<input type="checkbox"/> Duplicate Request	0
<input type="checkbox"/> Void	0
<input type="checkbox"/> On Hold	0
<input type="checkbox"/> Waiting More Information	0
<input type="checkbox"/> Open Extended	0
<input type="checkbox"/> Pending	0
<input type="checkbox"/> Waiting Funding	0
<input type="checkbox"/> Deferred	0
<input type="checkbox"/> Forwarded	0

- Click on the **number** next to “UNASSIGNED” on the Home page (see red arrow above).
- This will take you directly to the work order form of the oldest unprocessed work order in the system. At this point, you can either go ahead and handle this particular work order now, or you can choose another of the unprocessed work orders to process from the **Unprocessed New Requests dropdown box**, provided near the very top of the work order form (see green arrow on next page).

The screenshot shows the 'Sloan County Schools' Maintenance Direct interface. At the top, there are navigation links for Home, Calendar, New Work Order, Reports, Services, and Account Setup. A search bar is present with a 'GO' button. The main content area displays a work order form for 'WOID: 104' requested on 11/21/2005. The form includes several dropdown menus and checkboxes for fields such as Location, Building, Priority, Craft, Custom Category, Current Route To, Assign/Route To, Stop Routing?, Status ID, Area, Area Number, and Budget. A sidebar on the left contains 'Shortcuts' with buttons for 'Talk About It!', 'Suppliers', 'Print WO Batch', and 'Print New Requests'. A green arrow points to the 'Print WO Batch' button.

- On the work order form, you can view the details of the work order and make any changes you wish to make. You can also scroll down to the “Assign/Route To” field and choose a name from the drop-down box provided. Include any notes you wish to make.
- For your convenience, here is a list of all the fields you will find on the work order: WOID, Requested By and On, Location, Building, Priority, Emergency Notification, Craft, Custom Category, Current Route To, Assign/Route To, Stop Routing, Status ID, Area, Area Number, Budget, Purpose, Project, Don't Prompt For Status Change, Estimated State and Completion Dates, Estimated Hours and Costs, Action Taken, and Note(s).
- Depending on what you'd like to do, continue by choosing one of the steps below:
 - To save this work order and any changes you have made to it, click the **Submit** button. A prompt will display (unless you've turned it off) which will notify you that the status will change to “Work in Progress”. Click **OK**, unless you would like it to keep the status of “New Request”. If this is the case, click **Cancel**.

- Once you've processed all the work orders, you will see a notification that there are "No More New Requests to Process".
- To save and print out a copy of this work order, click the **Submit and Print** button. You will see a prompt (unless you've turned it off) to change the status to "Work in Progress". Click **OK** if you would like to make this change or **Cancel** if you would like to keep the status of "New Request". A page will come up with a printable version of the work order form. Print the form using the print function on your browser. Once the work order is printed, close the print window. The work order listing will be refreshed and the next work order in your list should appear ready to process.
- To clear the form of all of your changes, click the **Reset** button.

VI. Searching For Work Orders: The Information You Want When You Want It.

So you've learned how to create work orders, how to process work orders, and how to assign new work orders. The next step is to learn how to search for work orders that have been entered into the system. That way, you can find exactly what you need, when you need it.

To get started, let's take a look at the different types of searches that you can perform within MaintenanceDirect and then check them out, one by one:

1. Search
2. Advanced Search
3. Work Order by Status list
4. Last 10 Work Requests list

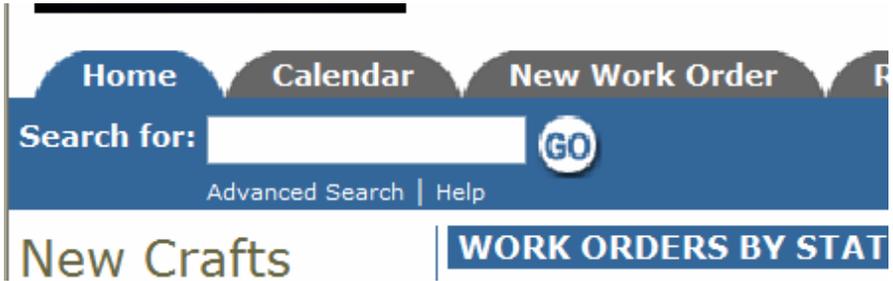
1. Search: This is the simplest search that you can perform. You can search for work orders using the search text box, located in the blue bar near the top, left-hand side of every page. See below:



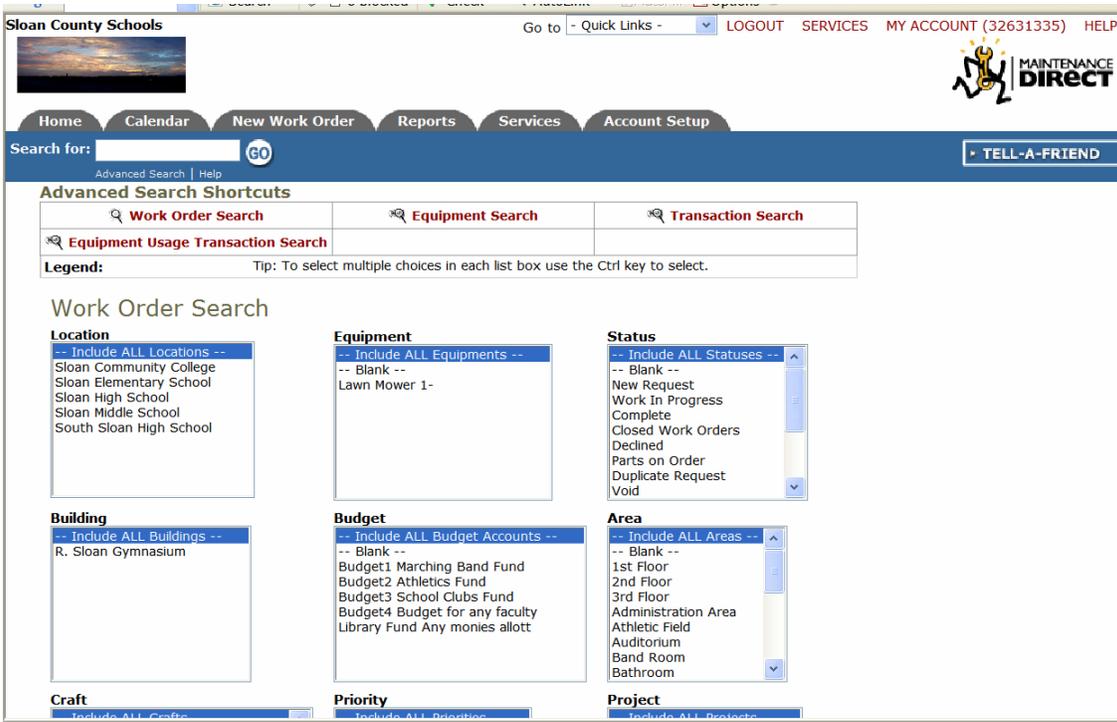
In this box, you can enter a work order number or a key word and click **Go** to search for the work order or information that you need.

For example, if you wanted to find work order #180, you would simply type "180" into the search box and click **Go**. That would then pull up the update page for that particular work order. If there is more than one work order which references work order #180, you would then see a listing of all matching work orders.

2. **Advanced Search:** Underneath the search field discussed above, you will see a link that says “Advanced Search”:



Clicking on this link will take you to the Work Order Search page, which will look something like this:



You should see all of the information that you entered during the Account Setup process, as far as the names of Locations, Buildings, Crafts, Purpose, Assigned To, Equipment, Budgets, Priority, Requested By, Status, Area, Project, and Custom Category.

On this page, you may choose any combination of search options from the listings and fields provided. Enter your options and click the **Search Now** button.

An example would be if you would like to search for all work orders with the status of “Work In Progress” for “Sloan High School” requested in September of 2003. In this case, you would choose “Sloan High School” from the Location list and “Work In Progress” from the Status list. In the request date fields, you would type “9/1/2003” to

“9/30/2003” and then click **Search Now**. A list of all work orders that meet those particular criteria would appear. If there was only one work order to meet those criteria, the work order update page for that work order would appear instead of the list.

- To print out the results list, click on the **Print This** icon at the bottom of the results page. To print out a single work order, click on the printer icon (🖨) next to the corresponding work order.
- To view a specific work order, click on the work order ID or the description.
- If you would like to send an email to the requester, click on the **requester name** to send an email via your email system (your browser and email must be configured to use “mail to” links).



SCHOOLDUDE SAYS: Narrow your Advanced Search criteria by choosing one of the shortcuts near the top of the screen, based on what information you’re looking for: Work Order Search, Equipment Search, Transaction Search, or Equipment Usage Transaction Search:

Home Calendar New Work Order Reports Services Account Setup

Search for: **GO**

Advanced Search | Help

Advanced Search Shortcuts

Work Order Search	Equipment Search	Transaction Search
Equipment Usage Transaction Search		

Legend: Tip: To select multiple choices in each list box use the Ctrl key to select.

3. **Work Order by Status List:** You can view all work orders in a particular status by clicking on the **number** next to the particular status you wish to view. You can edit the time period that is displayed in the section by selecting a new period from the drop-down box. The screen will then automatically refresh. See the **Work Orders By Status** list below:

The screenshot displays the 'WORK ORDERS BY STATUS' interface. At the top, there is a navigation bar with links for Home, Calendar, New Work Order, Reports, Services, and Account Setup. Below this is a search bar and a 'GO' button. The main content area is divided into three columns. The left column contains 'New Crafts' and 'Need Training?' sections. The middle column, titled 'WORK ORDERS BY STATUS', shows 'Last 10 Work Requests' with a 'Period' dropdown set to 'All'. Below this is a 'Request Totals' section with a pie chart and a list of request statuses: 2 New Request (1 UNASSIGNED, 1 In Approval Process), 0 Work In Progress, 0 Complete, 0 Closed Work Orders, 0 Declined, 0 Parts on Order, 0 Duplicate Request, 0 Void, 0 On Hold, 0 Waiting More Information, 0 Open Extended, 0 Pending, 0 Waiting Funding, 0 Deferred, and 0 Forwarded. A 'Refresh Pie' button is located below the list. The right column contains a 'WORK CENTER' section with a calendar for 11/15/2005 and a list of information analysis categories: Areas, Budget, Buildings, Classifications, Crafts, Employees, Equipment, Groups, Transactions, Locations, Manufacturers, Outstanding Work, Projects, Priority, Purpose, Status, Suppliers, Types, Work Load/Assignment, and Work Order.

Once you choose a period and click a number next to a particular status, a list of all work orders for that status in the specified time period will display in the Work Order Summary list. You can sort this list by any of the fields listed by clicking on the field name to sort by descending order or clicking again to sort by ascending order. The default sort is by “request date”.

Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_wohistory.asp?whereclause=StatusID%3C%3E3+AND+StatusID%3C%3E3 Go Links

Search for: GO TELL-A-FRIEND

Advanced Search | Help

Analysis Shortcuts

Talk About It!*	Suppliers *	New	Work Order List
Batch Close Work Orders	Graph Status Analysis	Graph Priority Analysis	Print Work Order Report

Quick Links
 - Print WO Batch
 - Print New Request
 - Print WO Range

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend: Click to sort table by that column. A second click on the same label will reverse the sort.

Filtering
 View work orders starting by location:
 0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

Work Order Summary List

1 - 2 of total 2 listed + Add New

WOID <input type="checkbox"/>	Deferred Until <input type="checkbox"/>	Status <input type="checkbox"/>	Location <input type="checkbox"/>	Requested <input type="checkbox"/>	Completed <input type="checkbox"/>	Total <input type="checkbox"/>
Priority <input type="checkbox"/>	Deferred By <input type="checkbox"/>	Requester <input type="checkbox"/>	Building <input type="checkbox"/>	Target <input type="checkbox"/>	Status Chg <input type="checkbox"/>	
Craft <input type="checkbox"/>	Reason <input type="checkbox"/>	Assigned To <input type="checkbox"/>	Area <input type="checkbox"/>	Area <input type="checkbox"/>	Action Taken <input type="checkbox"/>	Number <input type="checkbox"/>
Description <input type="checkbox"/>						
101 Low		New Request Ben dude	Sloan High School R. Sloan Gymnasium	11/14/2005	11/14/2005 1:18:07 PM	\$0.00
Air conditioning unit is out in the weight room.						
100 Low		New Request Schooldude Administrator	Sloan Community College	11/7/2005	11/7/2005 10:12:32 AM	\$0.00
Fallen ceiling tile needs to be replaced in the staff lounge.						

+ Add New First Previous 10 Next 10 Last

Print This! Print to Excel *Calculations shown on this page represent costs through yesterday. For up-to-date calculations use "Print Work Order Report" options.

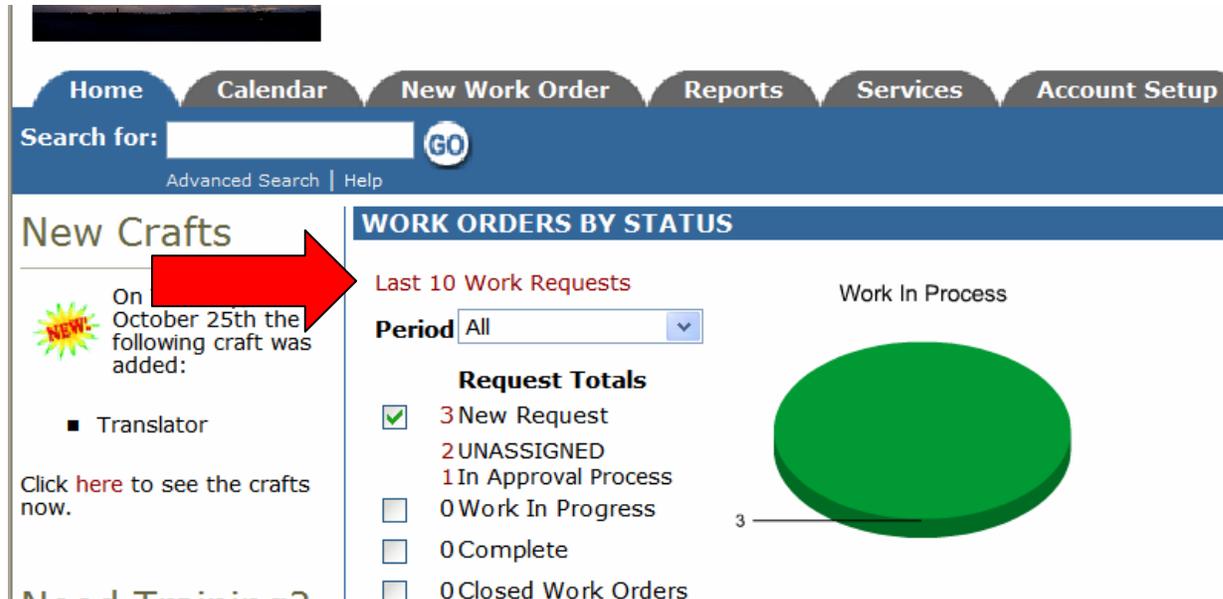
Home Calendar **New Work Order** Reports Services Account Setup Click here to talk to an Online Operator NOW!



SCHOOLDUDE SAYS: Keep in mind that clicking on any of the three numbers beside the three categories of “New Requests” (“New Request”, “Unassigned”, or “In Approval Process”) won’t take you to the Outstanding Work Orders list, but will take you instead to the work order form of the oldest work order in the system for that particular status. You can then scroll to each work order in that status by using the Unprocessed New Requests drop-down box provided.

- To view all the details of the work orders, click on the work order ID number (**WOID**).
- To send an email to the requester of the work order, click on that **requester’s name**.
- To view the details of the location of the work order, click on the **location**.

4. Last 10 Work Requests List: You can view the last ten work orders requested by clicking on the **Last 10 Work Requests** link, just below the words “Work Order By Status” on the Home page. See below:



This will take you to the Work Order Summary List page, where you will see the last ten requests listed.

- To view all the details of the work orders, click on the work order ID number (WOID).
- To send an email to the requester of the work order, click on that requester's name.
- To view the details of the location of the work order, click on the location.

VII. Completing/Closing Work Orders: When It's Time to Move On.

Work orders can be designated as “Complete” or “Closed Work Order”. Generally, if the actual work for the work order is done, you would mark it as “complete” because you may still have labor hours or purchase transactions to add to the work order. Once you add all transactions, however, you would then “close” the work order. Once a work order is closed, you cannot add any other transactions; in order to add transactions, you would need to re-open the work order.



SCHOOLDUDE SAYS: Note that you can NOT delete a work order. This is mainly for record-keeping purposes.

To mark a work order as complete, simply change its status to “Complete”. To close a work order, go in and change the status to “Closed Work Order”. Save your changes by clicking the **Save** button. See below:

Work Order: 101

 << First < Prev Next > Last >>

Status
 Complete ▾

Status Date
 11/14/2005 1:18:07 PM

Status Last Changed By

Work Order: 101

Status

Closed Work Orders

Status Date

11/14/2005 1:18:07 PM

Status Last Changed By

Closing Work Orders in Batches: You may find, at one time or another, that you want to mark work orders as complete and then close them later in a batch. In this case, do the following:

- Click on the **number** next to the “Complete” status on the Home page to get to the work order summary list.
- The “Batch Close Work Orders” option is on this page in the Shortcuts section. See below:

The screenshot shows the MaintenanceDirect interface for Sloan County Schools. A red arrow points to the 'Batch Close Work Orders' shortcut in the 'Analysis Shortcuts' section. Below this, the 'Work Order Summary List' is displayed, showing a single work order (WOID 101) with a status of 'Complete'. The interface includes navigation buttons, a search bar, and various utility links.

WOID	Deferred Until	Status	Location	Requested	Completed	Total
101	Low	Complete	Sloan High School	11/14/2005	11/16/2005	\$0.00

Air conditioning unit is out in the weight room.

- Click the **Batch Close Work Orders** shortcut to close multiple work orders at a time. You will be able to close ten (10) work orders at a time.
- Select a status from the drop-down box labeled “List Work Orders for Status”.
- Check all work orders that you would like to close. To close all the work orders in the list at once, click the **Check All** box provided.
- To close the work order(s), click the **Submit** button. **Please remember to only click the Submit button once.** It may take a few seconds to change each of the work orders, but the page will refresh when complete.

VIII. Using the Calendar: See the Big Picture.

As with all other SchoolDude products, MaintenanceDirect has a Calendar tab—a place you can go to see what’s going on, where, when, and who’s involved. You can see, in easy-to-read calendar format, work orders entered on a month-to-month or year-to-year basis. You can even check the weather! In this section of your manual, we’ll show you how to use the calendar and all of its options in the way that works best for you.

- To open up your calendar from wherever you are, click on the **Calendar tab** at the top of your screen.

The page that opens up will look something like this:

The screenshot shows a web browser window displaying the MaintenanceDirect calendar for November 2005. The page includes a navigation bar with tabs for Home, Calendar, New Work Order, Reports, Services, and Account Setup. Below the navigation bar is a search field and a "GO" button. The main content area features "Calendar Shortcuts" with options for Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather. The "Select Month/Year" dropdown is set to November 2005. The "Assigned To" dropdown is set to "Include ALL Assignees". The "Work Calendar for November 2005" section includes a tip and a calendar grid. The calendar grid shows work orders for various days, including "Matt's Birthday" on November 15. A legend at the bottom identifies work order types: MD Work Order (no icon), PM Work Order, and FSD Work Order.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
6	7 100	8	9	10	11	12
13	14	15 Matt's Birthday 102	16 Get Weather	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

At the top of your screen, just above the words “Work Calendar for...”, are the Calendar Shortcuts: Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather. In this section, we’ll cover each of these shortcuts in turn, starting with the Month View.

1. The **Month View** page shows you what’s going on, on a large, easy-to-read calendar, one month at a time. It’s the view that shows automatically when you open up the Calendar page—in other words, the page you’re looking at now.

The month you’re in currently will display with arrows in the bottom left and right-hand corners that you can click on to navigate to the **Previous Month** or **Next Month**. Just below the **Calendar Shortcuts**, you will see two drop-down boxes, one for the month and the other for the year, which serve as another kind of shortcut, allowing you to navigate the large calendar from one month to the next without clicking multiple times on the Previous Month and Next Month buttons.

On the **Month View**, each day shows in the traditional squares of a calendar, which contain any open work orders. Open work orders are those work orders not in the “Complete”, “Closed”, “Void”, or “Duplicate” status.

There are different icons used throughout the MaintenanceDirect **Calendar** page to indicate what kind of work orders the work orders on the calendar are. The legend for these icons is at the bottom of the **Month View** page and looks like this:

			Get weather			
20	21	22	23	24	25	26
27	28	29	30			

<- Previous Month

Next Month - >

Legend

-  MD Work Order (no icon)
-  PM Work Order
-  FSD Work Order
-  IT Work Order
-  PD Work Order

Tip: Click the day number to view work order details for the entire day or click a work order id to view/edit the work order..

[Home](#)
[Calendar](#)
[New Work Order](#)
[Reports](#)
[Services](#)
[Account Setup](#)

[Click here to go Online](#)

Work order numbers will be displayed on the calendar as red links and appear on the day of that work order’s Target Start Date. If you click on a work order number, it will take you to the work order update screen. If you see a number in parentheses next to the WOID, that is the “Estimated Hours” for that work order.

If your educational facility or district has PreventiveMaintenanceDirect, PM work orders will show as having a yellow background on the calendar, behind the WOID.

2. The Day View page can be reached in two ways:

- Clicking on the **Day View shortcut** at the top of the page, or
- Clicking on the **number of the date** on the monthly calendar.

The Day View automatically defaults to today's date. It shows you what's going on, one day at a time. You will see who the work order was assigned to (if applicable), the WOID number, the Work Order Request Description, the Location Name, and the Estimated Hours (if applicable). See area marked with the red arrow below:

The screenshot shows the Sloan County Schools Maintenance Direct interface. At the top, there are navigation tabs: Home, Calendar, New Work Order, Reports, Services, and Account Setup. Below these is a search bar and a 'GO' button. The main content area is titled 'Calendar Shortcuts' and includes buttons for 'Month View', 'Day View', 'Organization Event Calendar', 'Assignment Report', and 'Get Weather'. A 'Filtering' section allows users to view work orders starting by location, with a dropdown menu set to 'ALL'. The main display shows 'Work Orders for Tuesday 11/15/2005' with a small calendar on the right. The work order details include: 'Assigned To: WOID 102', 'WO Request Description: Substantial leak from sink in girl's bathroom.', 'Location Name: Sloan Middle School', and 'Estimated Hours: 0'. A 'Print This' button is located below the details. A red arrow points to the work order details, and a green arrow points to the small calendar on the right.

- You can navigate from one day to the next using the small calendar on the right-hand side of the screen (see green arrow above). Simply click the number of the day you wish to view. To move from one month to another, use the left and right arrows next to the name of the month at the top of the small calendar (see below).

The close-up shows a small calendar for November 2005. The days of the week are listed as S M T W T F S. The dates are arranged in a grid. The date 15 is highlighted in red, indicating the current day. The dates shown are: 30, 31, 1, 2, 3, 4, 5; 6, 7, 8, 9, 10, 11, 12; 13, 14, 15, 16, 17, 18, 19; 20, 21, 22, 23, 24, 25, 26; 27, 28, 29, 30, 1, 2, 3.

- To print a form for a work order, click on the **Print This** button for the corresponding work order.

3. The **Organization Event Calendar** page is where you can view and enter events, such as school breaks, for locations/organizations within your school or district. They will then be stored on a yearly calendar on the left-hand side of the screen and then listed in more detail on the right-hand side. You can reach the Organization Event Calendar by clicking on the short cut at the top of the Calendar page.

The Organization Event Calendar page should look something like this:

The screenshot shows the Sloan County Schools Organization Event Calendar page. At the top, there is a navigation menu with 'Calendar' selected. Below the menu is a search bar and a 'Calendar Shortcuts' section. A red arrow points to the 'Event Title' link in the 'Add New Event' form. Below the form is a calendar grid for 2005 and a list of events.

Begin Date	End Date	Event Title	Date Created
10/10/2005	10/14/2005	Fall Break	8/18/2005 9:05:27 AM
11/15/2005	11/15/2005	Matt's Birthday	9/8/2005 10:19:01 AM
12/19/2005	1/6/2006	Christmas Break	9/6/2005 2:33:56 PM
3/28/2006	3/28/2006	Test Event 2	9/6/2005 2:50:43 PM
4/17/2006	4/21/2006	Spring Break	9/6/2005 2:35:47 PM

To enter an event into the Organization Event Calendar, you'll need to start by creating an Event Title for that event and proceeding from there:

- To enter your Event Title, click on the **Event Title link** (shown in red above the Select Event Title drop-down box. See red arrow above).
- Clicking on the Event Title link will take you to a new page titled **Add/Update Event Code**. In the box provided next to the word Title, enter the **title** of the event. See next page:

Sloan County Schools Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (3263133)



Home Calendar New Work Order Reports Services Account Setup

Search for: TELL-A-FRIEND

Advanced Search | Help

Calendar Event Type Shortcuts

Talk About It! *	Suppliers *	New Calendar Event Type	My Calendar Event Types	Organization Event Calendar
-------------------------	--------------------	--------------------------------	--------------------------------	------------------------------------

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but PM Direct data is kept private to each account.

Legend: Indicates required information.

Add/Update Event

Title

Home Calendar New Work Order Reports Services Account Setup

Powered by:  Click here to talk to Online Operator N

Conditions of Use | Privacy Policy | Security Statement

LOGIN SERVICES MY ACCOUNT (32631335) HELP

Need help? Call us 1-877-868-DUDE (3833)

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- Click **Submit**.
- You will then be taken to the Calendar Event Types page, which will look something like this, depending on the events you have or haven't entered yet:

Address Links

Sloan County Schools Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP



Home Calendar New Work Order Reports Services Account Setup

Search for: TELL-A-FRIEND

Advanced Search | Help

Calendar Event Type Shortcuts

Talk About It! *	Suppliers *	New Calendar Event Type	My Calendar Event Types	Organization Event Calendar
-------------------------	--------------------	--------------------------------	--------------------------------	------------------------------------

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but PM Direct data is kept private to each account.

Legend: Click to sort table by that column.

Filtering

View budgets starting by Budget Code:
 0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Calendar Event Types

[+ Add New Event Type](#)

1 - 14 of total 14 listed Previous 20 Next 20

Event Description <input type="checkbox"/>	Date Created <input type="checkbox"/>
Christmas Break	8/30/2005
Fall Break	8/17/2005
Matt's Birthday	9/8/2005
Phil Day	9/21/2005
Spring Break	8/18/2005
Teacher Work Day (November)	11/16/2005
Test Event	8/30/2005
Test Event 2	9/6/2005
Test Event 3	9/7/2005
test event 3	9/7/2005
Test Event 4	9/7/2005

- Return to the **Organization Event Calendar** page by clicking on the **Organization Event Calendar** shortcut at the top of the page.

Your event's title has been entered, but the event itself still isn't on the calendar so to put it on the calendar, continue with the following:

- Select the **Location** for the event from the drop-down box provided just under the shortcuts section (see red arrow below). If this event will be for **ALL** locations, click the check box next to "Create for ALL Locations". See green arrow below:

www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_calendar_events.asp

Calendar Shortcuts: **Month View** | **Day View** | **Organization Event Calendar** | **Assignment Report** | **Get Weather**

Add New Event

Location: -- Select Location --

Begin Date: [] End Date: [] Event Title: [] Event Type: -- Select Event Type --

Create for ALL Locations

2005 Sloan County Schools Organization Event Calendar

All locations

January							February							March						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
						1														
2	3	4	5	6	7	8	6	7	8	9	10	11	12	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26	20	21	22	23	24	25	26
23	24	25	26	27	28	29	27	28						27	28	29	30	31		
30	31																			

1 - 5 of total 5 listed

Begin Date	End Date	Event Title	Date Created
10/10/2005	10/14/2005	Fall Break	8/18/2005 9:05:27 AM
11/15/2005	11/15/2005	Matt's Birthday	9/8/2005 10:19:01 AM
12/19/2005	1/6/2006	Christmas Break	9/6/2005 7:33:56

- Next, enter the **Begin** and **End Dates** of the event in the boxes provided.
- Choose the **Event Title** that you entered earlier from the "Select Event Type" drop-down box provided.
- Click **Submit**.

When the page refreshes, you will see that the new event has been added, both to the list on the right-hand side of the screen as well as blocked out in black on the calendar on the left-hand side of the screen.

Few More Things About the Calendar:

When you enter an event into the Organization Event Calendar, that event's date or dates will show as highlighted in black on the yearly event calendar on the left-hand side of the page.

Below is an example which shows that Fall Break will be from October 10-14. Its dates have been highlighted in black on the calendar.

S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S					
					1	2	1	2	3	4	5	6	7						1	2	3	4			
3	4	5	6	7	8	9	8	9	10	11	12	13	14	5	6	7	8	9	10	11					
10	11	12	13	14	15	16	15	16	17	18	19	20	21	12	13	14	15	16	17	18					
17	18	19	20	21	22	23	22	23	24	25	26	27	28	19	20	21	22	23	24	25					
24	25	26	27	28	29	30	29	30	31					26	27	28	29	30							
July							August							September											
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S					
					1	2	1	2	3	4	5	6						1	2	3					
3	4	5	6	7	8	9	7	8	9	10	11	12	13	4	5	6	7	8	9	10					
10	11	12	13	14	15	16	14	15	16	17	18	19	20	11	12	13	14	15	16	17					
17	18	19	20	21	22	23	21	22	23	24	25	26	27	18	19	20	21	22	23	24					
24	25	26	27	28	29	30	28	29	30	31				25	26	27	28	29	30						
31																									
October							November							December											
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S					
						1						1	2	3	4	5							1	2	3
2	3	4	5	6	7	8	6	7	8	9	10	11	12	4	5	6	7	8	9	10					
9	10	11	12	13	14	15	13	14	15	16	17	18	19	11	12	13	14	15	16	17					
16	17	18	19	20	21	22	20	21	22	23	24	25	26	18	19	20	21	22	23	24					
23	24	25	26	27	28	29	27	28	29	30				25	26	27	28	29	30	31					
30	31																								

Powered by: **SCHOOL** Home Calendar **Conditions of Use**

- To **delete** an Event entered onto the list and the calendar on the **Organization Events Calendar** page, simply find that item on the list and click the on the right-hand side, next to the event you wish to delete (see next page).
- To **edit** an Event's information once it's been entered into the Organization Event Calendar, enter the Event again into the calendar, using the corrected information, and then delete the previously entered incorrect Event from the list.
- To show only "Shared" events, that is, events shared by all Locations, click on the **Show Only Shared Events link** (shown in red) next to the clasped hands icon () on the Organization Events Calendar page. This link is located above the list of events (see next page).

Schools Organization Event Calendar

 **Show Only Shared Events**

1 - 6 of total **6** listed

◀ Previous 20 Next 20 ▶

March				
W	T	F	S	
2	3	4	5	
9	10	11	12	
16	17	18	19	

Begin Date	End Date	Event Title	Date Created	
10/10/2005	10/14/2005	Fall Break	8/18/2005 9:05:27 AM	 

4. The **Get Weather** shortcut, as with the weather icon on the main monthly calendar and the **Home** page, serves as a link to connect you with AccuWeather.com, where you can check current weather conditions in your area or the area where work orders are being done. You can also check the forecast with a range up to fifteen days.

- Simply click on the **Get Weather** shortcut near the top of the page and a separate browser page will pop up, displaying AccuWeather.com.



- Enter your Zip Code or City/State into the box shown above and click **Go**.

IX. Reports: Listing, Printing, and Graphing Your Work Orders.

SchoolDude provides you with the options of listing, graphing, and printing any and all of your work orders, along with their information, for your convenience and for your records. Follow the steps in this section and you'll have hard copies and visual aids for all of your work order information at your fingertips.

- The types of reports available in MaintenanceDirect are summarized in the following tables:

Budget Codes:

Report Types	Report Information
Summary	The budget summary report will give a summary of all labor hours, labor and material costs, total costs, budget amount, percentage spent, work order count and average hours/cost for each budget code. You can sort the report by budget code or by location.
Detail	The budget detail report will give you a detailed account of each transaction for work orders assigned to the budget codes. You can sort this report by budget code or by location. If you want to have a page break for each budget code or location, check the page break option.
Fiscal Year-end Comparison	The budget year-end comparison will display all the information from the summary report for the current fiscal year, as well as the previous fiscal year. You can sort the report by budget code or location

Classifications:

Report Types	Report Information:
Summary	The classification summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each classification.
Detail	The classification detail report will give you a detailed account of each transaction for work orders assigned the selected classifications.

Crafts:

Report Types	Report Information
Summary	The craft summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each craft. You can sort the report by location or craft.
Detail	The craft detail report will give you a detailed account of each transaction for work orders that are assigned the selected crafts.

Employees:

Report Types	Report Information
Summary Count	The employee summary count will give you a summary of each employee and how many work orders they are assigned in each work order status.
Estimate vs. Actual Analysis	This report will show all estimated and actual employee hours and costs on one report.
Detail Employee Counts	The detail employee count report will give you a listing of all the work orders that an employee has been assigned, as well as a total count. The report will show the work order number, requester, and the description for each work order.
Detail Employee Cost	The detail employee cost lists each employee and their total hours worked, average number of hours per work order, the total cost, the average cost per work order, and the number of work orders.
Employee Productivity	The employee productivity report will list each employee, the work orders assigned to them, and the number of days to complete those work orders. It will also give the total and an average number of days to complete.

Equipment:

Report Types	Report Information
Summary (All)	The equipment summary report will give you summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each piece of equipment.
Detail (All)	The equipment detail report will give you a detailed account of each transaction for work orders assigned the selected equipment.
Summary (Maintenance vs. Preventive Maintenance)	The equipment summary report (maintenance vs. preventive maintenance) will give you a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per piece of equipment. The maintenance and preventive maintenance will be separated for comparison.
Detail (Maintenance vs. Preventive Maintenance)	The equipment detail report (maintenance vs. preventive maintenance) will give you a detailed account of each transaction for work orders that are assigned the selected equipment. The maintenance and preventive maintenance will be separated for comparison.

Equipment Usage:

Report Types	Report Information
Summary (Equipment Costs)	The equipment summary report will give you summary of all usage purchases for each piece of equipment.
Detail (Equipment Costs)	The equipment detail report will give you a detailed account of each usage transaction for work orders assigned the selected equipment.
Summary (Work Order Costs)	The equipment summary report will give you a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per piece of equipment
Detail (Work Order Costs)	The equipment detail report will give you a detailed account of each transaction for work orders that are assigned the selected equipment.

Groups: *This is only used if you import a code schema.*

Report Types	Report Information
Summary	The group summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each group.
Detail	The group detail report will give you a detailed account of each transaction for work orders that are assigned the selected groups.

Transactions:

Report Types	Report Information
Summary	The transaction summary report will give a total quantity and cost for a group of transactions. For example, you can print a report for a technician for the total number of hours they worked that month. You can also print a report showing all the purchases from a specific supplier. You can sort this report by transaction type or location.
Detail	The transaction detail report will give you the total quantity and cost of a group of transactions, like the summary report. It will also list all the transactions that make up the total cost. You can sort this report by transaction type or location.

Locations:

Report Types	Report Information
Summary	The location summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per location.
Detail	The locations detail report will give you a detailed account of each transaction for work orders assigned the selected locations.

Manufacturers:

Report Types	Report Information
Summary	The manufacturer summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per manufacturer.
Detail	The manufacturers detail report will give you a detailed account of each transaction for work orders assigned to the manufacturers.

Outstanding Work:

Report Types	Report Information
List	This list will display all open work orders that are in the status of “New Request”, “Work in Progress”, or “Pending”.

Projects:

Report Types	Report Information
Summary	The project summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per project.
Detail	The projects detail report will give you a detailed account of each transaction for work orders that are assigned the selected projects.

Purpose:

Report Types	Report Information
Summary	The purpose summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per purpose.
Detail	The purpose detail report will give you a detailed account of each transaction for work orders that are assigned the selected purpose.

Status:

Report Types	Report Information
Summary	The status summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per status.
Detail	The status detail report will give you a detailed account of each transaction for work orders that are assigned the status projects.

Suppliers:

Report Types	Report Information
Master List	The master list will print out all supplier information in list format.
Summary	The supplier summary report will give you a summary of total costs from this supplier.
Detail	The supplier detail report will display all the transactions that make up the total costs from this supplier.

Types:

Report Types	Report Information
Summary	The type of summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per type.
Detail	The type detail report will give you a detailed account of each transaction for work orders assigned the selected types.

Work Load:

Report Types	Report Information
Calendar	This report will take you to the calendar, where you can print an assignment report.

Work Orders:

Report Types	Report Information
Summary	The work order summary report will give you a summary of each employee and the count of how many work orders they are assigned in each work order status.
Summary 2	The work order summary 2 report will give you a listing of all the work orders, based on your criteria. You can sort this list by status, date, work order ID, location, priority, assigned employee, budget, project, purpose, or craft.
Detail	The detail report will give you a full report for each work order in the criteria that you've selected. The detail report is several pages per work order.
Detail Analysis Pivot Graph	The detail analysis pivot graph is available for Microsoft Excel only. It provides a way to customize a work order count report and graph.

Custom Category:

Report Types	Report Information
Summary	The custom category summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each custom category.
Detail	The custom category detail report will give you a detailed account of each transaction for work orders that are assigned the selected custom categories.

Listing:

1. Go to the **Information Analysis** section of MaintenanceDirect, either on the **Home** page, or by clicking on the **Reports** tab from wherever you are in MD. The **Reports** page looks something like this:

Sloan County Schools

Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP

Home Calendar New Work Order Reports Services Account Setup

Search for: GO

Advanced Search | Help

TELL-A-FRIEND

Reports

You will find many useful reports in each of the options under "Information Analysis" show on the right.

Benchmarking

How is your department performing? Establish new goals from benchmarking data.

Now, innovative executives can learn from actual success stories and case studies that demonstrate the power of benchmarking-- sharing the best practices to set quality standards for topics, problems, and, most importantly, processes. Camp shows how global leaders in manufacturing, service, government, and other areas have used benchmarking to reduce waste, improve quality, and streamline current systems. **Purchase Now!**

Graphs

View your data graphically. Bar charts, pie charts, and much more. To make your graph clickable we use Flash. Click [here](#) to download Macromedia Flash Player.

INSTALL NOW

Information Analysis

- Areas
- Budget
- Buildings
- Classifications
- Crafts
- Employees
- Equipment
- Equipment Usage
- Groups
- Locations
- Manufacturers
- Outstanding Work
- Projects
- Priority
- Purpose
- Status
- Suppliers
- Types
- Transactions
- Work Load/Assignment
- Work Order
- Custom Category

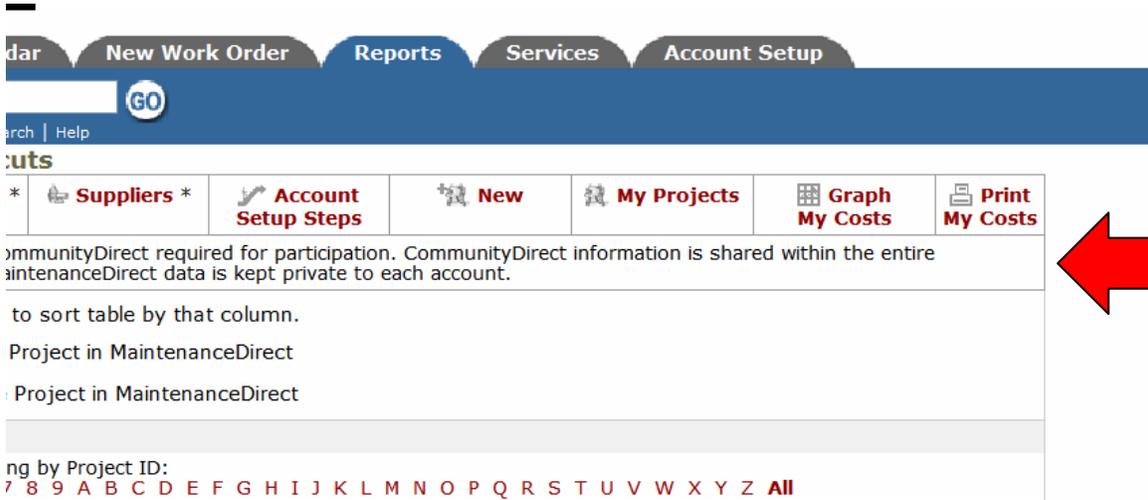
Printed Reports

2. Under the **Information Analysis** section, click on the category you wish to list.
3. No matter what category you click, you will find the list link in the **Shortcuts** section, though it may have different names:
 - ✓ Area List
 - ✓ My Budget Codes
 - ✓ My Buildings
 - ✓ My Classifications
 - ✓ Craft List
 - ✓ Employee Status Counts
 - ✓ My Equipment List
 - ✓ My Equipment Usage List
 - ✓ My Groups
 - ✓ Transaction List
 - ✓ My Locations
 - ✓ My Manufacturers
 - ✓ Work Order List
 - ✓ My Projects

- ✓ My Priority Codes
- ✓ My Purpose Codes
- ✓ Status List
- ✓ My Suppliers
- ✓ My Types
- ✓ List Custom Category

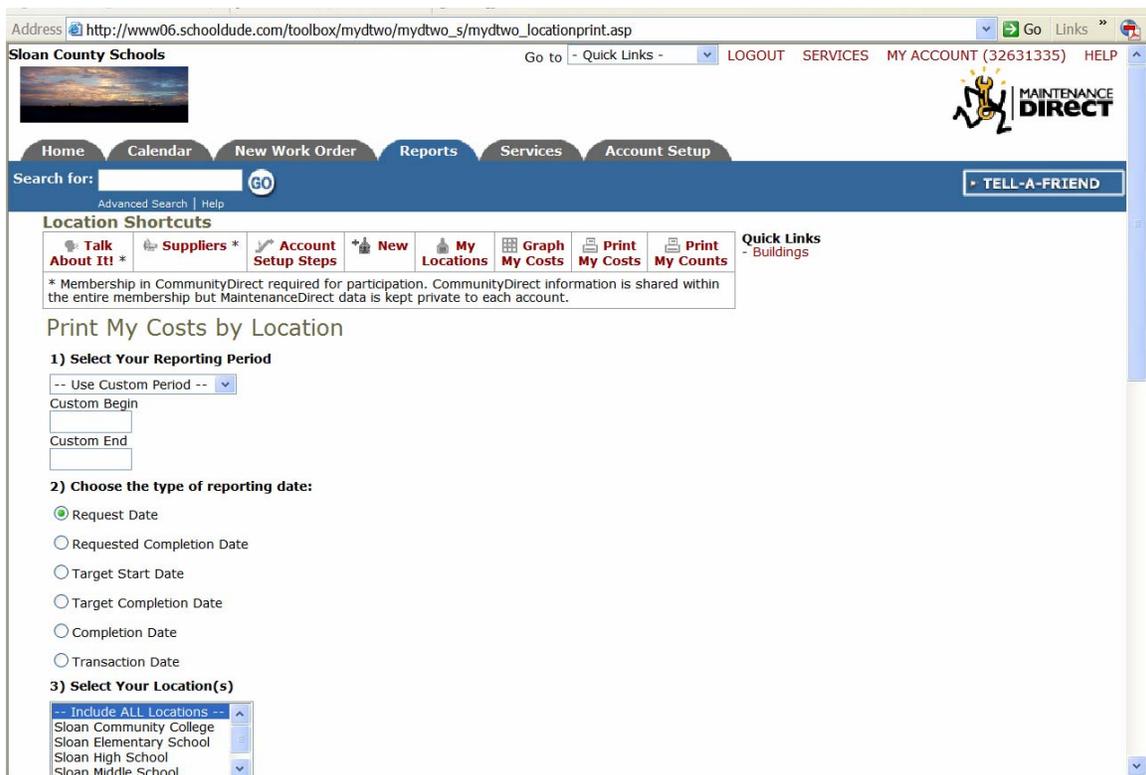
Printing:

4. After you find the information you want by using the **Information Analysis** menu and clicking the appropriate link, look for the “Print My ...” icon in the shortcuts menu. See example below:



The screenshot shows a web application interface with a navigation menu at the top containing 'Home', 'New Work Order', 'Reports', 'Services', and 'Account Setup'. Below the navigation menu is a search bar with a 'GO' button. The main content area features a 'Shortcuts' section with several icons: 'Suppliers *', 'Account Setup Steps', 'New', 'My Projects', 'Graph My Costs', and 'Print My Costs'. A red arrow points to the 'Print My Costs' icon. Below the shortcuts is a text box containing the following text: 'CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.' Below this text is a table with columns for sorting by Project ID, with a red arrow pointing to the 'Print My Costs' icon.

- Follow the instructions on the appropriate page (the page below is shown as an example), filling out the necessary information and choosing the period you wish to print, etc.



The screenshot shows a web application interface for 'Sloan County Schools'. The address bar displays 'http://www06.schoolsde.com/toolbox/mydtwo/mydtwo_s/mydtwo_locationprint.asp'. The page features a navigation menu with 'Home', 'Calendar', 'New Work Order', 'Reports', 'Services', and 'Account Setup'. Below the navigation menu is a search bar with a 'GO' button. The main content area features a 'Location Shortcuts' section with several icons: 'Talk About It!', 'Suppliers *', 'Account Setup Steps', 'New', 'My Locations', 'Graph My Costs', 'Print My Costs', and 'Print My Counts'. A 'Quick Links' section is also visible. Below the shortcuts is a text box containing the following text: '* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.' Below this text is a form titled 'Print My Costs by Location'. The form includes the following sections:

- 1) Select Your Reporting Period**
 - Use Custom Period -- (dropdown)
 - Custom Begin (text input)
 - Custom End (text input)
- 2) Choose the type of reporting date:**
 - Request Date
 - Requested Completion Date
 - Target Start Date
 - Target Completion Date
 - Completion Date
 - Transaction Date
- 3) Select Your Location(s)**
 - Include ALL Locations -- (dropdown)
 - Sloan Community College (checkbox)
 - Sloan Elementary School (checkbox)
 - Sloan High School (checkbox)
 - Sloan Middle School (checkbox)

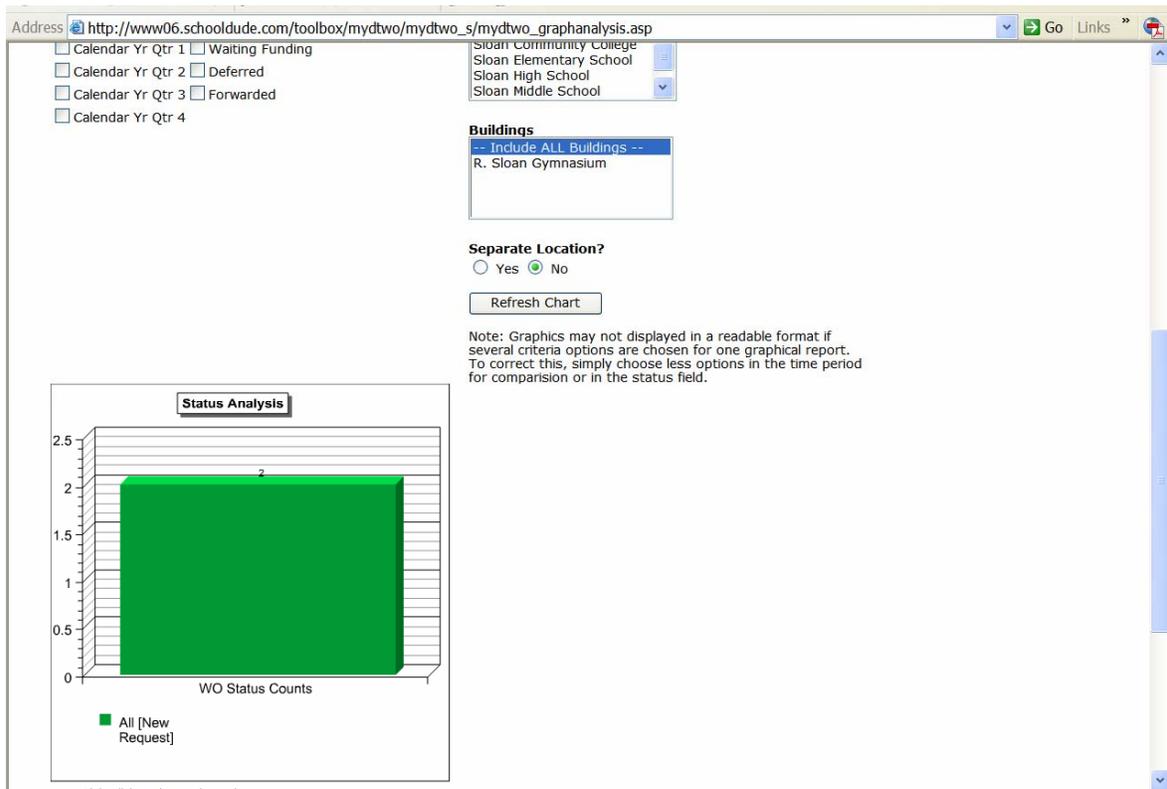
- When you're finished, click the **Print This!** icon at the bottom of the page.

➤ You can also print any page that has a **“Print This!”** icon on it:



Graphing:

5. If you wish to view a graph of certain information, follow steps 1 through 3 above, using the **Information Analysis** menu and choosing the category you wish to view. Then do the following:
 - Follow the instructions on the appropriate page, which will take you through the period, priority, location, “Assign to” person, chart title and type, etc.
 - Click the **Refresh Chart** button. A chart will appear at the bottom of the page, graphing out the information you indicated above.
 - Change the information shown on the graph by changing the options above the chart.

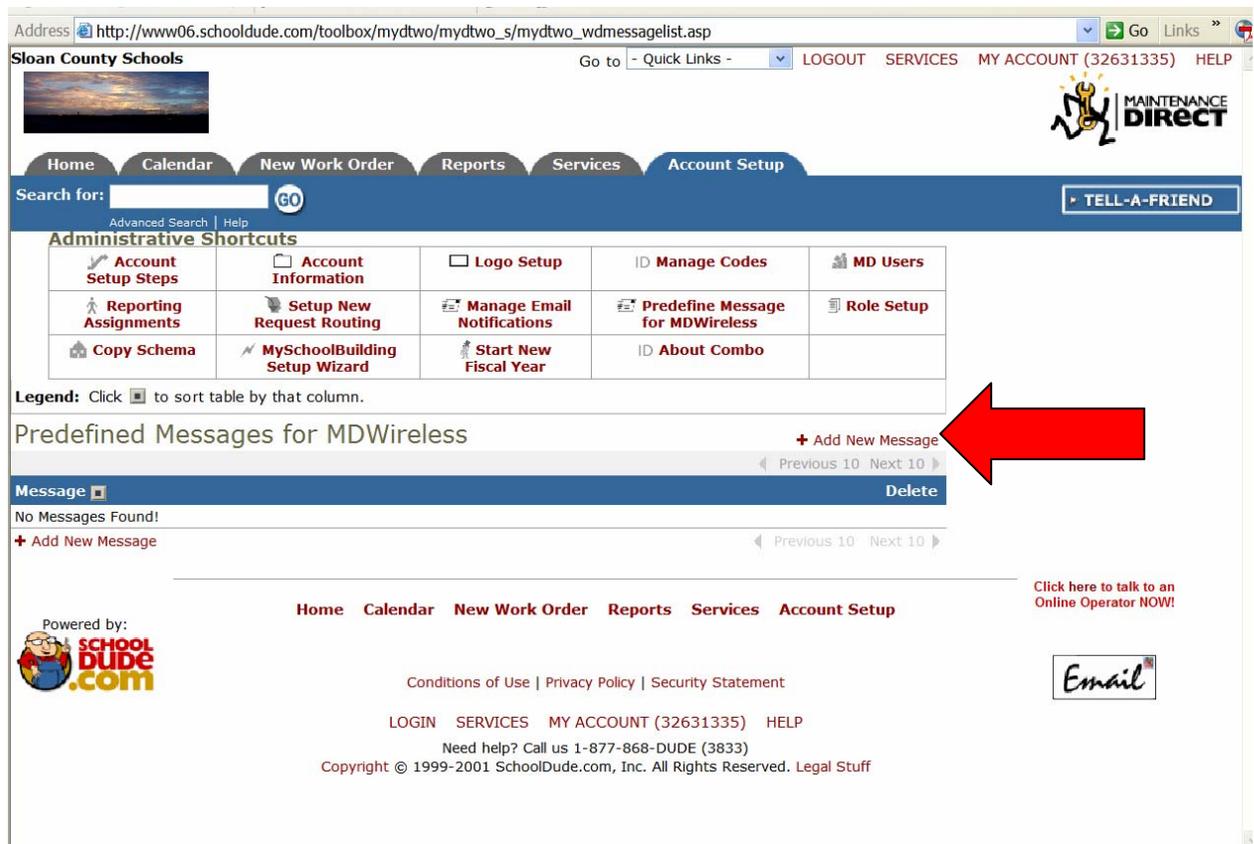


X. MaintenanceDirect Wireless: Take Us With You.

MaintenanceDirect Wireless is a wireless/mobile work order management tool that enables mobile maintenance and operations professionals to receive and complete work in the field via a wireless/mobile device. If you will be using MDWireless, welcome aboard and let's get started!

In this section, we'll walk you through the **Predefined Messages for MDWireless** section of the Account Setup process, where you can enter messages that you know can be used frequently, over and over, without having to write them repeatedly each time they are needed.

- On the Account Setup page, click on the **Predefine Messages for MDWireless** link.
- You will be taken to the **Predefined Messages for MDWireless** page, which will look something like this:



The screenshot shows the MaintenanceDirect Wireless web application interface. The browser address bar displays the URL: http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_wdmessagealist.asp. The page header includes the Sloan County Schools logo and navigation links: Home, Calendar, New Work Order, Reports, Services, and Account Setup. The Account Setup page is active, showing a search bar and a "TELL-A-FRIEND" button. Below the search bar is the "Administrative Shortcuts" section, which contains a grid of links for various functions, including "Predefine Message for MDWireless". A legend indicates that clicking a square icon allows sorting by column. The main content area is titled "Predefined Messages for MDWireless" and shows a message list with a "Delete" button and a "+ Add New Message" link. A red arrow points to the "+ Add New Message" link. The footer includes the SchoolDude.com logo, navigation links, and copyright information.

- You will see the words “No Messages Found!” underneath the Message list. To get started adding messages, click the **+Add New Message** link, shown above.

- On the Add/Update Predefined Message page, enter your message into the box provided. See below:

The screenshot shows the top navigation bar with buttons for Home, Calendar, New Work Order, Reports, Services, and Account Set. Below this is a search bar with a 'GO' button and links for 'Advanced Search' and 'Help'. A section titled 'Administrative Shortcuts' contains a grid of icons and text for various functions: Account Setup Steps, Account Information, Logo Setup, ID Manage Code, Reporting Assignments, Setup New Request Routing, Manage Email Notifications, Predefine Message for MDWireless, Copy Schema, MySchoolBuilding Setup Wizard, Start New Fiscal Year, and ID About Combo. A legend indicates that a checked box represents required information. The main content area is titled 'Add/Update Predefined Message' and features a checked 'Message' checkbox next to a large text input field. A 'Save' button is located below the input field. At the bottom, there is a 'Powered by: SCHOOL DUDE' logo and a secondary navigation bar with buttons for Home, Calendar, New Work Order, Reports, and Services.

- Click **Save**.
- Continue entering messages until you think you've covered all your bases with message scenarios.

Supervisor I/II

I. Welcome to the Home Page! Now What? *(A quick overview of what's on the Home page.)*

Once you've logged in with your user name and password, you're taken directly to your Home page. It should look something like this (the pie chart will only appear once work orders have been entered into the system):

The screenshot displays the SchoolDude.com interface. At the top, the address bar shows the URL: <http://www06.schooldude.com/toolbox/mydtwo/mddefault.asp>. The page header includes 'Sloan County Schools' and 'MAINTENANCE DIRECT'. Navigation tabs are labeled 'Home', 'Calendar', 'Work Order', 'Reports', and 'My Settings'. A search bar is present with a 'GO' button. The main content area is divided into several sections:

- SPECIAL NOTICE:** A notice regarding office closures for Thanksgiving and the following week.
- LOGIN HERE:** A personalized greeting for 'Ben dude'.
- Quick Launch:** A list of links for 'New Request', 'Print WO Batch', 'Account Settings', 'User Forum', 'More Services', 'My SchoolBuilding', and 'SchoolDude.com'.
- WORK ORDERS BY STATUS:** A section titled 'Last 10 Work Requests' with a 'Period' dropdown set to 'All'. It shows 'Request Totals' with a checked box for '1 Complete' and a 'Refresh Pie' button. A 3D pie chart is displayed with a single green slice representing 'Complete' work orders. A legend below the chart shows a green square next to the word 'Complete'. A note states: 'Counts are based on Status Date for each selected period. This reflects the actual date of the last status change.'
- WORK CENTER:** Includes a 'CALENDAR' section for '11/21/2005 WORK (Monday)' and a 'Get Today's Weather' link.
- Information Analysis:** A list of menu items including 'Areas', 'Budget', 'Classifications', 'Buildings', 'Crafts', 'Employees', 'Equipment', 'Groups', 'Transactions', 'Locations', 'Manufacturers', 'Outstanding Work', 'Projects', 'Purpose', 'Status', 'Suppliers', 'Types', 'Work Load/Assignment', 'Work Order', and 'Custom Category'.



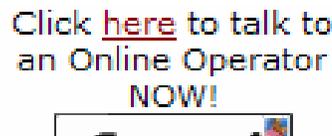
SCHOOLDUDE SAYS: Macromedia Flash Player (a free download) is required to view this and other graphs.

Across the top of the page, there are five tabs reading: “Home”, “Calendar”, “Work Order”, “Reports”, and “My Settings”. Each of these tabs will be discussed in detail further on but for now, let’s take a look at the Home page. It contains the following sections:

1. **New Crafts:** (Will show in the top, left-hand side once new crafts have been entered, where “Special Notice” shows above.) The craft list in MaintenanceDirect is a predefined list. When you add new crafts to the system, they will show up in this section.
2. **SPECIAL NOTICE:** This section will show if there is SchoolDude news or announcements that we need to make you aware of, like holiday closings (as seen above for Thanksgiving).
3. **Quick Launch:** This section provides commonly used links including **New Request**, **Print Work Order Batch**, **Account Settings**, **User Forum** (a place to submit questions and/or problems you encounter while using MaintenanceDirect. You can also read questions others have posted.), and **More Services** (tells you what services are included in your annual MaintenanceDirect fee as well as optional services available and services not included), as well as links to **MySchoolBuilding.com** and **SchoolDude.com**.
4. **LOGIN HERE** : If you are logged in, you should see your name here. If you do not see your name, click the word “**yourself**” to log in correctly.
5. **WORK ORDERS BY STATUS** : The graph that will appear in this section shows the number of work orders by status. For a **Supervisor I**, any work order assigned to themselves or to their direct reports will display in this section. For a **Supervisor II**, any work orders that are in their designated locations and crafts will appear in this section, as well as any work orders assigned to themselves or to those who report directly to them. To filter the graph by period, select the desired period from the dropdown box. Click the checkbox next to the corresponding location to add or remove it from the graph. The numbers next to each status are the number of work orders currently in that status. Click the number to view a list of all work orders in that particular status. If you change any graph options, click the **Refresh Pie** button to refresh the graph
6. **ASSIGNED WORK** : Near the bottom of the Home page, you will find the **Assigned Work** section, where all work orders assigned to

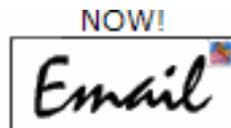
you or your location will display. From this section, you can print the work orders, reassign the work, add action taken, or mark it as complete.

7. **WORK CENTER**: The Work Center provides links to the monthly calendar as well as today's work. There is also a link to get today's weather. The total number of assigned work orders is displayed here, along with the total number of assigned PreventiveMaintenanceDirect work orders (if you are a PreventiveMaintenanceDirect client).
8. **Information Analysis** : This is your go-to section for "getting it done". It provides important links for all the major components of work order management: Areas, Budget, Buildings, Classifications, Crafts, Employees, Equipment, Groups, Transactions, Locations, Manufacturers, Outstanding Work, Projects, Priority, Purpose, Status, Suppliers, Types, Work Load/Assignment, Work Order, and Custom Category.
9. **Help** : links are available in the bottom right-hand corner of your Home page, as well as at the very bottom of the page, just above our contact information. Clicking on the Help link in the top right-hand corner will take you to the MaintenanceDirect manual at any time. If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your Home page. To connect directly with someone from SchoolDude Support via Instant Messenger, click on the word "here" (underlined and highlighted in red). See below:



Click here to talk to
an Online Operator
NOW!

To write and send an email directly to SchoolDude Support, simply click on the Email icon directly below the link we just mentioned. The Email link looks like this:

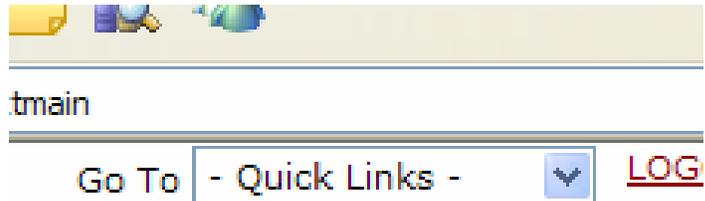


NOW!
Email

A blank email form will pop up, already addressed and ready to use.

12. The **Quick Links** provide you with a way to navigate quickly between SchoolDude products. In other words, if you would like to move from

MaintenanceDirect to another product used by your school for whatever reason, all you have to do is click on the **Quick Links drop-down box**, choose the SchoolDude product you'd like to visit, and you'll be taken to that product's **Home** page automatically. Quick Links is located at the top of the **Home** page, near the right-hand corner, and looks like this:



13. **Did you know?** 🌅: Just a bit of interesting trivia we thought we'd share each day.

II. My Settings: Your Information in a Nutshell.

Before we get started with the nuts and bolts of the work order process, let's take a minute to check out the **My Settings** page, which contains your information as entered by the Administrator during the account setup process. Use this page to edit your information or to change your password.

Your My Settings page should look something like this:

Address: http://www06.schooldude.com/Toolbox/mydtwo/mydtwo_s/mydtwo-participants.asp?username=BenDude

Home Calendar Work Order Reports My Settings

Search for: GO

Legend: Indicates required information.
 Account Administrator

Work Order Participant Information

Login Name

First Name

Last Name

Email
 Receive email notifications.

Reports To
(Note: Reports to fields helps supervisors and administrators process and manage work assignments.)

Personnel Type

Phone Number

Fax

Pager

Pager Email Notify electronically by Pager?
(Note: Pager notifications for work requester is not supported. Unit must support text-based electronic notifications. You can test [here](#).)

 Notify Pager Email only for Emergency Work Orders.

Cellular Phone

- Make any changes you wish to make and click **Done**. If you don't want to change your password at this time, you don't have to. Your changes will be made anyway.
- When you click Done, you will be taken back to your **Home** page. Your changes have been made.



SCHOOLDUDE SAYS: If you don't see the change immediately, for instance, if you changed the spelling of your name and the spelling hasn't changed under the **Login Here** section, don't worry. Next time you log in, you'll see that the change has been made.

III. Entering/Editing Work Orders: MD in Action.

Supervisor I's and Supervisor II's will only see different work orders in the **WORK ORDERS BY STATUS** section of the Home page, based on what is routed to them.

If you are a Supervisor I, you will see all new requests *assigned to you or to any employees who report directly to you*. If you are a Supervisor II, you will be able to see all new requests for the work orders *from your assigned locations and crafts* in addition to new requests *assigned to yourself or any employees who report directly to you*. Both roles also have the ability to create work orders of their own.

To understand what is involved with creating your own work orders as well as editing the work orders that are routed to you, we'll take a look at the work order form itself and the fields it contains. See below:

The screenshot shows a web browser window with the URL http://www06.schoolsde.com/toolbox/mydtwo/mydtwo_s/mydtwo_woupdate.asp?n=1. The page header includes "Sloan County Schools" and "MAINTENANCE DIRECT". The navigation menu contains "Home", "Calendar", "New Work Order", "Reports", "Services", and "Account Setup". A search bar is present with a "GO" button and a "TELL-A-FRIEND" link.

The main content area is titled "Work Order Shortcuts" and contains a grid of icons for various actions: Talk About It!, Suppliers, New, Short WO Form, Request Info, Contact Info, Assignment Info, Budget Info, Deferral, Action Taken, Messages, Journal Notes, Transactions, Approval Routing, Attach File, Print Form, Print Details, and PM Schedule. A "Submit My" button is also visible.

Below the shortcuts is a legend: **Legend:** Indicates required information. Automatically saves on click.

The "Work Order: NEW" form is displayed with the following fields:

- Status**
- Status Date**
- Priority**
- Created By** Schoolde Administrator
- Date Created**
- Request Info**
 - Location**
 - Building**
 - Area**
 - Area Number**

To get started making a new work order of your own, follow the steps below, keeping in mind that indicates a required field:

- **Status:** Choose the status you would like from the drop-down box provided.

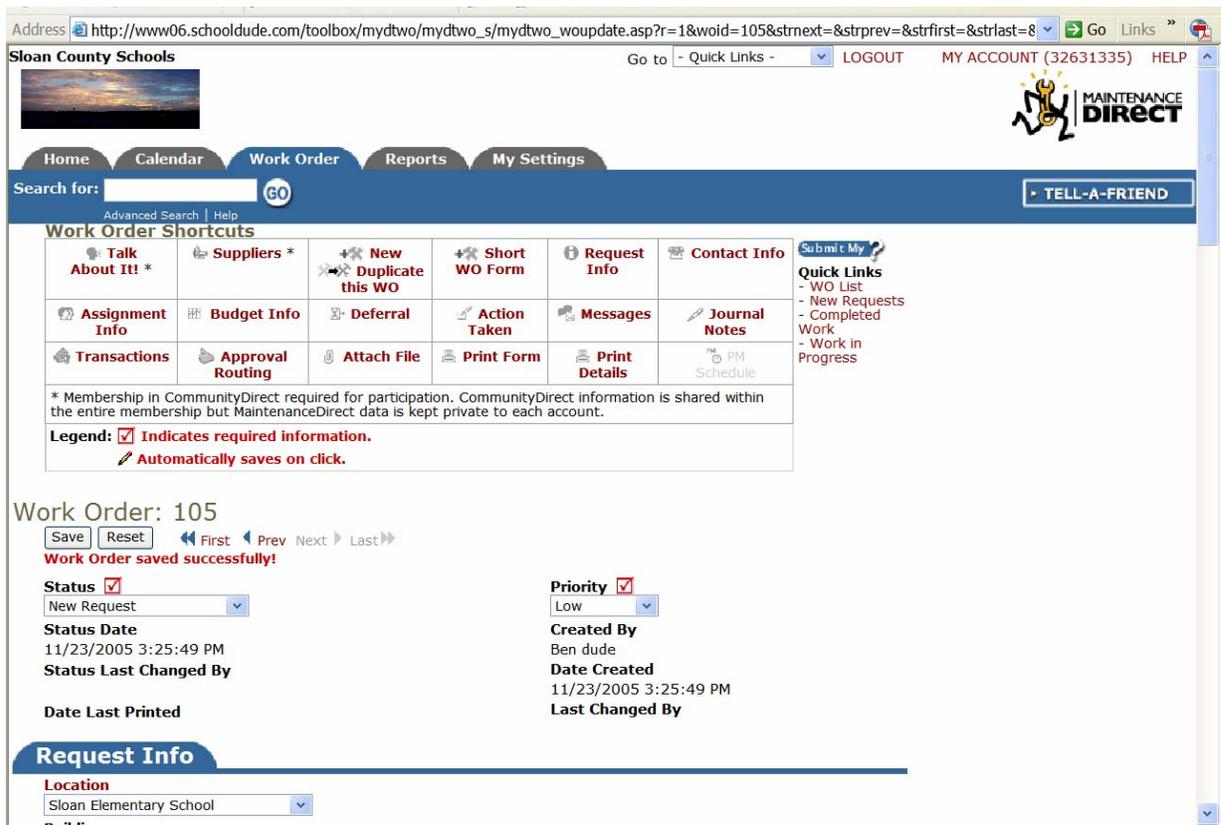
- **Priority:** Choose the priority of your work order (Low, Medium, High, Emergency, Safety, and Scheduled).
- **Status Date, Created By, and Date Created** will all display in this section. **Status Date** is the date that the status was last changed. **Created By** lists the user who initially created the work order. **Date Created** is the date that the work order was initially created.
- **Request Info:** Enter your **Location, Building, Area, Area Number, Request Date,** and **Request Description**. If the priority selected for the work order was “emergency”, the Emergency check box will show as already checked here.
- **Deferral:** If you would like to defer this work order until a later time, you may enter the **New Due Date, Deferred By** and the **Deferral Reason** in the corresponding fields provided. For example, you may receive a request to paint a room and you want to complete the work order over Spring Break, when no students will occupy the room. You can change the work order’s status to “On Hold” and designate a reason under the **Deferral** section.
- **Contact Info. :** In this section, the person making the request should fill in their contact information in the fields provided (First Name, Last Name, Email, Phone, Pager, and Cell Phone). If this were a work order that you were receiving to approve, the requester’s contact information would already be filled in in this section.
- **Assignment Info. :** Select the user assigned to the work order from the drop-down box provided. If this is a new request and you are routing to the person for approval, check the **Route for Approval or Review** option.
- Enter the **Target Start Date** and **Target Completion Date**, as well as the **Requested Completion Date** and/or the **Actual Completion Date**.
- Enter the **Estimated Costs** and **Estimated Hours**. As you enter transactions into the system, **Actual Costs, Actual Hours,** and **Total Costs** will display underneath for comparison.
- **Budget:** Choose the **Purpose** of the request from the drop-down box provided. The purpose is generally *why* you are performing the work order. For example, if it is a work order for removing graffiti from a wall, the purpose would be “vandalism”.
- Choose the **Craft** for the request from the drop-down box provided.
- Select the **Budget Code, Custom Category,** and **Project** from their corresponding drop-down boxes.

- If this work order is to be performed using an item in the **Equipment** list, you can choose the item from the **Equipment** drop-down box. If this is a not a new work order but is a PM work order that you are approving, you will also see a **Classification** and **Type** selected.

- Click **Save** at the bottom of the page.

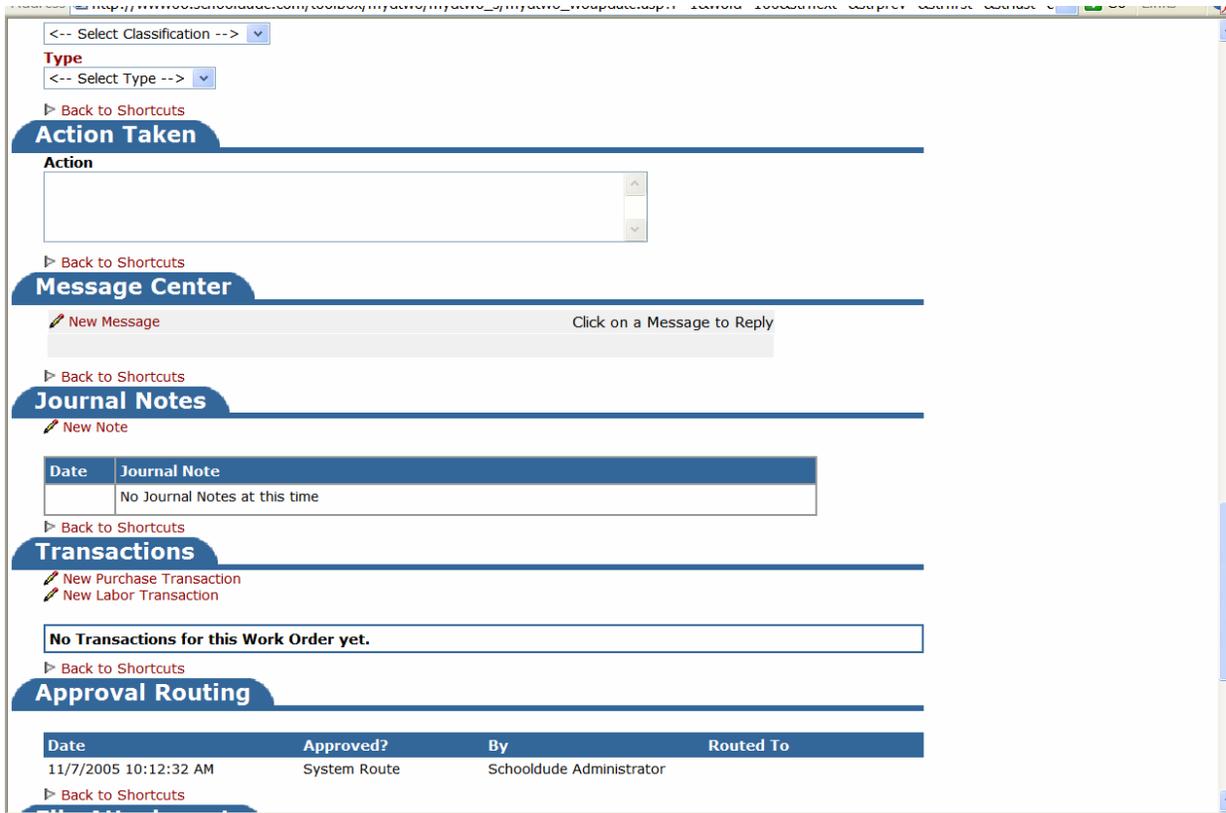
You're halfway there!

Once you click Save, the next page you see will look something like this:



The top half of the page will look just like the page you just filled out, only the words **“Work Order Saved Successfully!”** will appear in red, just under the new work order number (in this case, 100). See red arrow above.

To continue filling in further details for the work order, **if necessary**, scroll about halfway down the page to the new section, which starts with **Action Taken**. It will look like this:



- If you are approving a work order that has been entered by a requester, enter the **Action Taken** for this work order here. The requester will then be able to view this information when checking the work order's status.
- **Message Center:** This section will allow you to send an email message regarding the work order to anyone in the system. It will also show email notifications sent out from our servers. To enter a new message, click the **New Message** link.
- **Journal Notes:** This section allows you to post journal notes regarding the work order. You also have the option of sending out a reminder email for the journal note. To create a new journal note, click the **New Note** link.
- **Transactions:** From this section, you can add and edit Labor and Purchase Transactions. If you have InventoryDirect, you will also be able to add and edit Issue Transactions. Transactions will be discussed in more detail in the next section of this manual.
- **Approval Routing:** This section displays all the routes the work order has taken for approval.
- **File Attachments:** You can attach up to two files to each work order. Keep in mind that they must be 3MB or less each.

- Click **Save**. Or, to clear the work order of all changes you just made, click **Reset**.

- Once your work order has been saved, it will show up in the **WORK ORDERS BY STATUS** section of the **Home** page, listed by the status you chose for it. If this is your first work order, you will now see a pie graph displayed in this section of the **Home** page as well. See below:

The screenshot shows the Sloan County Schools Maintenance Direct interface. The 'WORK ORDERS BY STATUS' section is the primary focus, showing a pie chart for 'Work In Process' with 1 'New Request'. The 'Request Totals' list includes: 1 New Request (checked), 1 UNASSIGNED, 0 In Approval Process, 0 Work In Progress, 0 Complete, 0 Closed Work Orders, 0 Declined, 0 Parts on Order, 0 Duplicate Request, 0 Void, 0 On Hold, 0 Waiting More Information, 0 Open Extended, 0 Pending, 0 Waiting Funding, 0 Deferred, and 0 Forwarded. The 'WORK CENTER' section on the right includes a calendar for 11/8/2005 (Tuesday) and a list of information analysis categories such as Areas, Budget, Buildings, Classifications, Crafts, Employees, Equipment, Groups, Transactions, Locations, Manufacturers, Outstanding Work, Projects, Priority, Purpose, Status, Suppliers, Types, and Work Load/Assignment Work Order.

- As work orders are added, edited, and routed, they will show up in the **WORK ORDERS BY STATUS** section of the **Home** page, based on their current status. To view work orders that hold a particular status, simply click on the number next to the status label you wish to view.

IV. Assigning New Requests: Who's Doing What?

As you've learned, when a requester makes a request, the initial status of the request is "New Request". New Requests have two subcategories: "Unassigned" and "In Approval Process" (the numbers next to these on the Home page don't necessarily have to add up to the number next to "New Requests"). Unassigned work orders, which can be viewed in the **WORK ORDERS BY STATUS** section of your Home page (see screen shot below), are just what you think—those with no assignment at all. However, they can also be those that are assigned to you to be reassigned.

Any work order that is "In Approval Process" has been routed to another user for approval so you don't have to worry about it at this point.



SCHOOLDUDE SAYS: Clicking on the number next to "New Requests" will NOT take you to the Work Order Summary List (which shows all work orders in handy-dandy list format). Instead, it will take you to the work order form of the OLDEST of the New Requests that have been entered. In order to reach each of the New Requests at this point, you will have to click on the **Unprocessed New Requests drop-down box** provided and select the New Request you wish to view from the list it shows.



SCHOOLDUDE SAYS: A New Request's status determines whether or not you can or should deal with it at this point. In other words, if it's "In Approval Process", it has currently been routed to another user for approval and therefore, isn't yours to deal with yet. If it's "Unprocessed", however, you can go ahead and process it, assigning it to whomever needs to handle it at the time. For this reason, we recommend avoiding clicking on the number next to "New Requests". Instead, go straight to "Unprocessed" to handle those work orders that need direction.

To process your new requests, do the following from the Home page:

The screenshot displays the Sloan County Schools Maintenance Direct web application. The page layout includes a top navigation bar with links for Home, Calendar, Work Order, Reports, and My Settings. A search bar is located below the navigation bar. The main content area is divided into three columns. The left column, titled 'LOGIN HERE', shows a user greeting: 'Hello Ben Dude. Not Ben Dude! Please be yourself.' Below this is a 'Quick Links' section with various options like 'New Request', 'Print WO Batch', 'Account Settings', 'User Forum', 'More Services', 'My SchoolBuilding', and 'SchoolDude.com'. The middle column, titled 'WORK ORDERS BY STATUS', displays 'Last 10 Work Requests' and a 'Request Totals' section. The 'Request Totals' section shows: 3 New Request, 1 UNASSIGNED, 2 In Approval Process, and 2 Complete. A pie chart titled 'Work In Process' is shown with a legend indicating 'New Request' (green) and 'Complete' (purple). A red arrow points to the number '1' next to 'UNASSIGNED'. The right column, titled 'WORK CENTER', includes a 'CALENDAR' section showing '11/30/2005 WORK (Wednesday)' and a 'Get Today's Weather' link. Below this is a section for 'OTHER ASSIGNED WORK' and 'TOTAL ASSIGNED WORK', both showing a count of 3. At the bottom of the right column is an 'Information Analysis' menu with various categories like 'Areas', 'Budget', 'Classifications', 'Buildings', 'Crafts', 'Employees', 'Equipment', 'Groups', 'Transactions', 'Locations', 'Manufacturers', 'Outstanding Work', 'Projects', 'Purpose', 'Status', 'Suppliers', 'Types', 'Work Load/Assignment', 'Work Order', and 'Custom Category'. The browser address bar at the top shows 'http://www.schoolde.com'.

- Click on the **number** next to “UNASSIGNED” on the Home page. (See red arrow above).
- This will take you directly to the work order form of the oldest unprocessed work order in the system. You can either go ahead and handle this particular work order now, or you can choose another of the unprocessed work orders to process from the Unprocessed New Requests dropdown box, provided in near the very top of the work order form (see green arrow on next page).

The screenshot shows the 'Sloan County Schools' Maintenance Direct interface. At the top, there are navigation links for 'Home', 'Calendar', 'New Work Order', 'Reports', 'Services', and 'Account Setup'. A search bar is present with a 'GO' button and a 'TELL-A-FRIEND' link. The main content area is titled 'Shortcuts' and contains a sidebar with links like 'Talk About It!', 'Suppliers', 'New', 'Show all New Requests', 'Print WO Batch', and 'Print New Requests'. The main form area is for 'Unprocessed New Requests' and includes the following fields:

- Sort by:** Request Age (Ascending/Descending)
- Check here if you want to use Batch Print feature.
- Unprocessed New Requests:** Light board in auditorium is malfunctioning. (indicated by a green arrow)
- WOID: 104 Requested By: On: 11/21/2005**
- Location:** South Sloam High School
- Building:** -- No Building Available --
- Priority:** Low (Emergency notification? Emergency)
- Craft:** -- Select Craft --
- Custom Category:** -- Select Custom Category --
- Current Route To:** Assign/Route To: --Select Assigned/Route To-- (View Assignments)
- Stop Routing?** (Assignee will do this work.)
- Status ID:** New Request
- Area:** -- Select Area --
- Area Number:** [Text Input]
- Budget:** Show Budget?

- On the work order form, make any changes you wish to make, either routing it on to someone else for completion or indicating that you've completed the work order yourself. Include any notes you wish to make.
- For your convenience, here is a list of all the fields you will find on the work order: WOID, Requested By and On, Location, Building, Priority, Emergency Notification, Craft, Custom Category, Current Route To, Assign/Route To, Stop Routing, Status ID, Area, Area Number, Budget, Purpose, Project, Don't Prompt For Status Change, Estimated State and Completion Dates, Estimated Hours and Costs, Action Taken, and Note(s).
- Depending on what you'd like to do, continue by choosing one of the steps below:
 - To save this work order and any changes you have made to it, click the **Submit** button. A prompt will display (unless you've turned it off) which will notify you that the status will change to "Work in Progress". Click **OK**, unless you would like it to keep the status of "New Request". If this is the case, click **Cancel**.
 - Once you've processed all the work orders, you will see a notification that there are "No More New Requests to Process".

- To save and print out a copy of this work order, click the **Submit and Print** button. You will see a prompt (unless you've turned it off) to change the status to "Work in Progress". Click **OK** if you would like to make this change or **Cancel** if you would like to keep the status of "New Request". A page will come up with a printable version of the work order form. Print the form using the print function on your browser. Once the work order is printed, close the print window. The work order listing will be refreshed and the next work order in your list should appear ready to process.

- To clear the form of all of your changes, click the **Reset** button.

V. Entering Labor and Purchase Transactions: How Much Was That Again?

The cost of a work order comes from the labor and purchase transactions attached to it. To track those costs without having to chase down receipts, simply enter them into MaintenanceDirect and our system will organize them for you so that you'll always know exactly how much a work order costs and why. You've got all the answers.

In MaintenanceDirect, transactions can be entered in two ways. The first of those that you will mostly likely encounter will be the Transactions section of the work order itself. The second way is to use the link provided on the Home page itself. We'll cover each method separately in this section.

Method 1:

As you saw in the previous section, the second page of a work order contains a Transactions section where you can click one of two links:



Clicking on the **New Purchase Transaction** link on the work order form will take you to the following page where you can enter and save all of the purchase transaction information for the current work order. See below:

Address: http://www06.schoolsde.com/toolbox/mydtWO/mydtWO_s/mydtWO_transaction_new.asp?WOID=106

Search for: **GO** TELL-A-FRIEND

Advanced Search | Help

Transaction Shortcuts

Talk About It! *	Suppliers *	Labor Types	Labor	Purchases
Transaction List	Graph Transactions	Print Transactions		

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend: **Indicates required information.**

Purchases **Back to WOID 106**

Work Order: 106

Search WOID

Description	Two lights out in stairwell.
Location	Sloan Elementary School
Status	New Request
Assigned To	Howard Dude

Trns Date

Type

Select Supplier or type new one below.

Supplier

Invoice/PO #

Budget Code

Purchased by

Description

Quantity

Required information fields include Transaction Date, Type, Description, Quantity, and Cost Each.

Clicking on the **New Labor Transaction** link on the work order form will take you to the following page, where you can enter and save labor transaction information for this particular work order. See below:

Address http://www06.schooldude.com/toolbox/mydtWO/mydtWO_s/mydtWO_LaborEntry.asp?fromwoid=106&delttempcookie=1 Links

Sloan County Schools Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar Work Order Reports My Settings

Search for: TELL-A-FRIEND

Advanced Search | Help

Work Order Labor Entry for Dude, Howard

Employee:

Print This! Back to WO 106

Date: (Note: OT represents "Other Time". click OT to enter time for holidays, comp, and/or overtime.)

<< Prev 10 Next 10 >>

November 2005							Work Order ID/Location Action Taken	Work Close?	Fri Nov 25	Sat Nov 26	Sun Nov 27	Mon Nov 28	Tue Nov 29	Wed Nov 30	Thu Dec 1	Total Hours	
S	M	T	W	T	F	S	106 Sloan Elementary	<input type="checkbox"/>	0	OT	0	OT	0	OT	0	OT	0
30	31	1	2	3	4	5	School										
6	7	8	9	10	11	12	<input type="text"/>	Actual Comp. Date: <input type="text"/>									
13	14	15	16	17	18	19											
20	21	22	23	24	25	26											
27	28	29	30	1	2	3											
(Note: You can change the display dates by clicking a day on the above calendar.)								Total Hours	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	
Grand Total Hours								<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	
								<input type="button" value="Save"/>	<input type="button" value="Reset"/>								

Print This! Back to WO 106

[Home](#) [Calendar](#) [Work Order](#) [Reports](#) [My Settings](#)

Powered by: [Click here to talk to an Online Operator NOW!](#)

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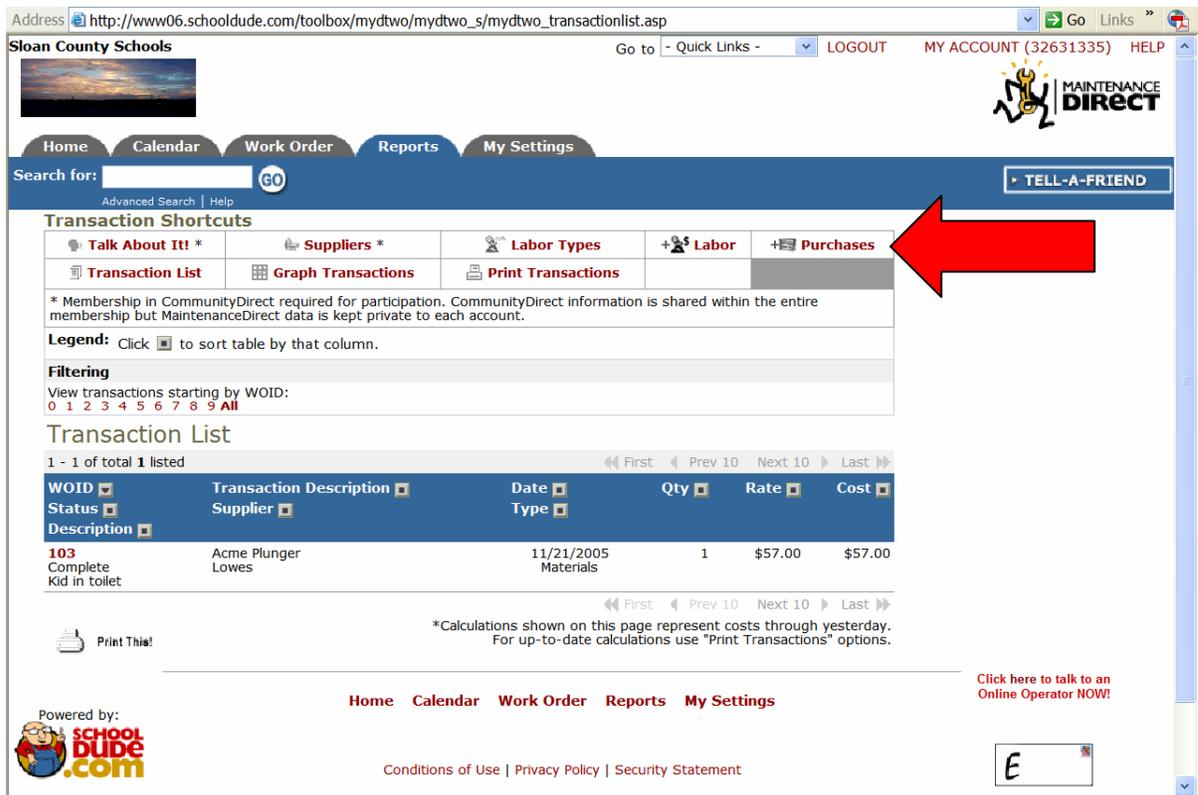
- If you need to account for overtime, comp time, holiday time, or any other time, you can click on OT (“Other Time”) next to the corresponding date. A window will appear for you to enter in any other times.
- Click **Save** when you’re done.

Method 2:

The second way to enter purchase and labor transactions into MaintenanceDirect is through the link provided on the **Home** page. This method would probably be most useful to someone role who may be entering purchase transactions by going through a stack or list of invoices. It provides a faster, more streamlined way to enter transactions into MaintenanceDirect.

To get started, take a look at the **Information Analysis** section of the **Home** page. As was mentioned earlier in the **Home** page discussion at the beginning of this manual, the **Information Analysis** section is a quick source for locating and managing all the information pertaining to work orders within MaintenanceDirect. To work within Transactions, click on the **Transactions** link here.

The Transactions page will look something like this:



The screenshot shows the MaintenanceDirect web interface. At the top, there's a navigation bar with 'Home', 'Calendar', 'Work Order', 'Reports', and 'My Settings'. Below that is a search bar and a 'GO' button. The main content area is titled 'Transaction Shortcuts' and contains several links: 'Talk About It!', 'Suppliers', 'Labor Types', 'Labor', and 'Purchases'. A red arrow points to the 'Purchases' link. Below the shortcuts, there's a 'Transaction List' section with a table of transactions. The table has columns for WOID, Status, Description, Supplier, Date, Type, Qty, Rate, and Cost. One transaction is listed with WOID 103, Description 'Complete Kid in toilet', Supplier 'Acme Plunger Lowes', Date '11/21/2005', Type 'Materials', Qty '1', Rate '\$57.00', and Cost '\$57.00'. At the bottom, there's a footer with 'Powered by: SCHOOL DUDE .com' and a 'Print This!' button.

WOID	Transaction Description	Date	Qty	Rate	Cost
103	Complete Kid in toilet	11/21/2005	1	\$57.00	\$57.00

New Purchases: (Keep in mind that = required field.)

- Click on the **Add New Purchases** link on the **Transaction List** page, located on the right-hand side of the **Shortcuts** section (see arrow above).
- You will be taken to the following page, where you will need to enter the **WOID** (Work Order ID number) for the work order you wish to view purchases for and click **Search**.



- Once you enter the correct WOID, you will be taken to the Purchases page for that particular work order, which should look something like this:

Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_transaction_new.asp?WOID=106

Home Calendar Work Order Reports My Settings

Search for: GO [TELL-A-FRIEND](#)

Transaction Shortcuts

Talk About It! *	Suppliers *	Labor Types	Labor	Purchases
Transaction List	Graph Transactions	Print Transactions		

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend: Indicates required information.

Purchases [Back to WOID 106](#)
Work Order: 106

Search WOID

Description	Two lights out in stairwell.
Location	Sloan Elementary School
Status	New Request
Assigned To	Howard Dude

Trns Date

Type

Select Supplier or type new one below.

Supplier

Invoice/PO #

Budget Code

Purchased by

Description

Quantity

Cost Each **% Markup** **% Discount**
 (Note: If no discount or markup, please leave blank. When used, the original cost is automatically adjusted and saved.)

Sales Tax

Shipping/Freight

Other Charges

Amount

Complete Work Order

[New Purchase Transaction](#)
[New Labor Transaction](#)

No Transactions for this Work Order yet.

Home Calendar Work Order Reports My Settings [Click here to talk to an Online Operator NOW!](#)

Powered by: [Conditions of Use](#) [Privacy Policy](#) [Security Statement](#)

- On this page, fill out the required information fields (marked with a), along with any other information you wish to include, and click **Submit** at the bottom.

- After you've entered your purchase information and clicked Submit, the page will refresh and purchases will show in a blue table at the bottom of this page. See below:

INVOICE/PO #

Budget Code -- Select Budget Account --

Purchased by -- Select Purchaser --

Description

Quantity

Cost Each % Markup % Discount

(Note: If no discount or markup, please leave blank. When used, the original cost is automatically adjusted and saved.)

Sales Tax

Shipping/Freight

Other Charges

Amount

Complete Work Order

Submit

1 - 1 of total 1 listed << First Previous 25 Next 25 Last >>

Date	Item Number Description	Type Invoice/PO #	Labor	Qty	Cost Each	Tax	Shipping/ Other	Amount
11/28/2005	Florescent tubes.	Materials		4	\$1.8700	\$0.00	\$0.00 \$0.00	\$7.48
Total Labor								\$0.00
Total Sales Tax								\$0.00
Total Purchases								\$7.48
Total Inventory								\$0.00
Total Shipping								\$0.00
Total Others								\$0.00
Grand Total								\$7.48

- Once entered, purchases will show on the Transaction List page as well.

VI. Searching for Work Orders: The Information You Want When You Want It.

So you've learned how to create work orders, how to process and assign work orders, as well as how to enter purchase and labor transactions. The next step is to learn how to search for work orders that have been entered into the system. That way, you can find exactly what you need when you need it.

To get started, let's take a look at the different types of searches that you can perform within MaintenanceDirect and then check them out, one by one:

1. Search
2. Advanced Search
3. Work Order by Status list
4. Last 10 Work Requests list

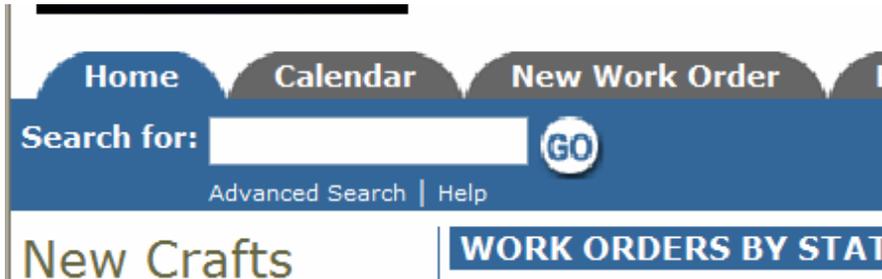
1. Search Using the “Search for” Field: This is the simplest search that you can perform. You can search for work orders using the search text box, located in the blue bar near the top, left-hand side of every page. See below:



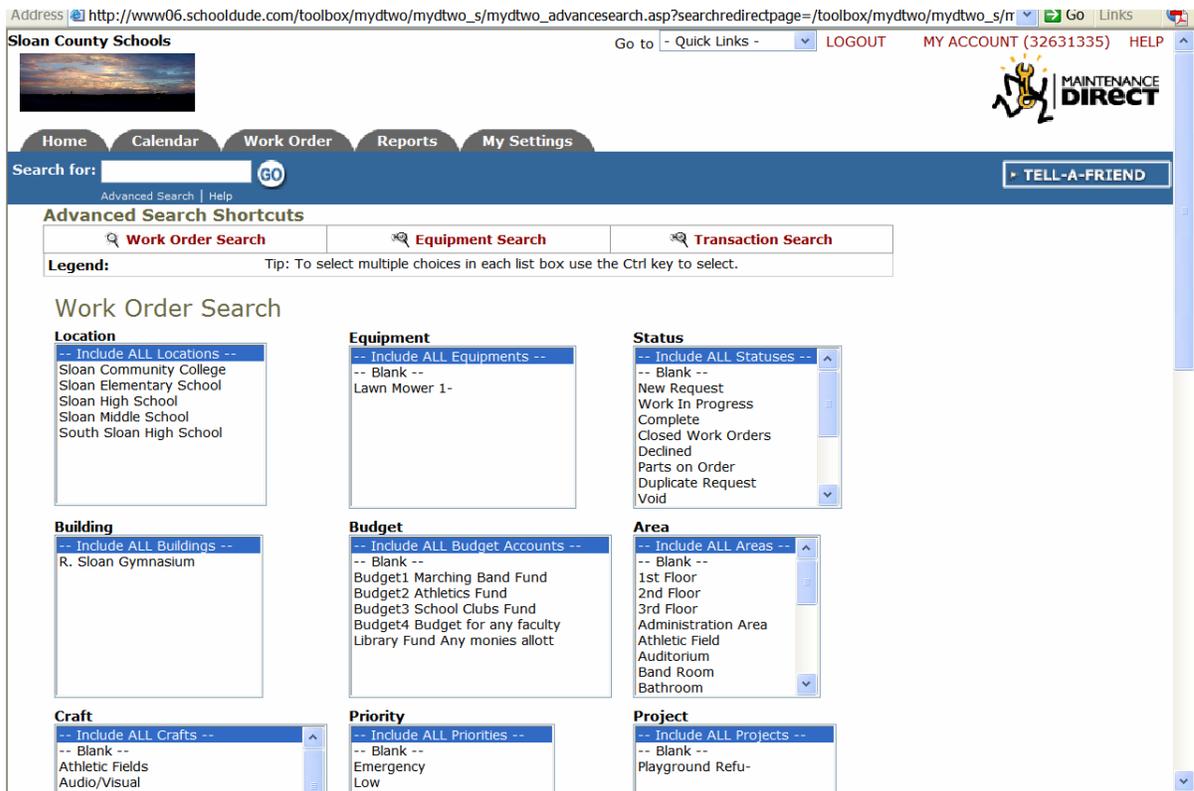
In this box, you can enter a work order number or a key word and click **Go** to search for the work order or information that you need.

For example, if you wanted to find work order #180, you would simply type “180” into the search box and click **Go**. That would then pull up the update page for that particular work order. If there is more than one work order which references work order #180, you would then see a listing of all matching work orders.

2. **Advanced Search:** Underneath the search field discussed above, you will see a link that says “Advanced Search”.



Clicking on this link will take you to the Work Order Search page, which will look something like this:



On this page, you may choose any combination of search options from the listings and fields provided. Enter your options and click the **Search Now** button.

An example would be if you would like to search for all work orders with the status of “Work In Progress” for “Sloan High School” requested in September of 2003. In this case, you would choose “Sloan High School” from the Location list and “Work In Progress” from the Status list. In the request date fields, you would type “9/1/2003” to

“9/30/2003” and then click **Search Now**. A list of all work orders that meet those particular criteria would appear. If there was only one work order to meet those criteria, the work order update page for that work order would appear instead of the list.

- To print out the results list, click on the **Print This** icon at the bottom of the results page. To print out a single work order, click on the printer icon () next to the corresponding work order.
- To view a specific work order, click on the work order ID or the description.
- If you would like to send an email to the requester, click on the **requester name** to send an email via your email system (your browser and email must be configured to use “mail to” links).

3. **Work Order by Status List:** You can view work orders (those routed to you) in a particular status by clicking on the **number** next to the status you wish to view. You can edit the time period that is displayed in the section by selecting a new period from the drop-down box. The screen will then automatically refresh. See the Work Orders By Status list below:

Address: <http://www06.schooldude.com/toolbox/mydtWO/mddfault.asp> Go Links

Sloan County Schools Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP



Home Calendar **Work Order** Reports My Settings

Search for: TELL-A-FRIEND

SPECIAL NOTICE

NOTICE
The offices at SchoolDude.com will be closed November 24th and 25th in observation of the Thanksgiving holiday. We will reopen at 8am Eastern Time on November 28th. However, our products do not get a holiday and will be up and operational as always. The team at SchoolDude.com wishes you and your family a safe and happy holiday.

LOGIN HERE
Hello Ben dude
Not Ben dude! Please be yourself.

Quick Launch

- New Request
- Print WO Batch
- Account Settings
- User Forum
- More Services
- My SchoolBuilding
- SchoolDude.com

WORK ORDERS BY STATUS

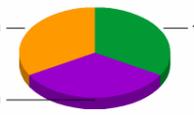
Last 10 Work Requests

Period:

Request Totals

- 1 New Request
- 0 UNASSIGNED
- 1 In Approval Process
- 1 Work In Progress
- 1 Complete

Work In Progress



Legend:
■ New Request
■ Work In Progress
■ Complete

Counts are based on Status Date for each selected period. This reflects the actual date of the last status change.

WORK CENTER

CALENDAR

11/28/2005 WORK (Monday)
 Get Today's Weather

OTHER ASSIGNED WORK 2

TOTAL ASSIGNED WORK 2

Information Analysis

- Areas
- Budget
- Classifications
- Buildings
- Crafts
- Employees
- Equipment
- Groups
- Transactions
- Locations
- Manufacturers
- Outstanding Work
- Projects
- Purpose
- Status
- Suppliers
- Types
- Work Load/Assignment
- Work Order
- Custom Category

Once you choose a period and click a number next to a particular status, a list of all work orders for that status in the specified time period will display in the Work Order Summary list. You can sort this list by any of the fields listed by clicking on the field name to sort by descending order or clicking again to sort by ascending order. The default sort is by “request date”.

The screenshot shows the MaintenanceDirect web application interface. At the top, there is a navigation bar with 'Home', 'Calendar', 'Work Order', 'Reports', and 'My Settings' tabs. A search bar is present with a 'GO' button. Below the navigation, there are 'Analysis Shortcuts' for 'Talk About It!', 'Suppliers', 'New', and 'Work Order List'. A 'Quick Links' section includes 'Print WO Batch', 'Print New Request', and 'Print WO Range'. A 'Filtering' section allows users to view work orders starting by location, with a list of letters from A to Z and 'ALL'. The main section is the 'Work Order Summary List', which shows 1 of 1 total work orders listed. The table has columns for WOID, Priority, Deferred Until, Status, Requester, Location, Building, Area, Requested Target, Completed Status Chg, and Total. The single work order listed has WOID 100, Priority Low, Status Work In Progress, Requester Ben dude, Location Sloan Community College, Requested Target 11/7/2005, Completed Status Chg 11/22/2005 10:46:34 AM, and Total \$0.00. The description for this work order is 'Fallen ceiling tile needs to be replaced in the staff lounge.' At the bottom, there are 'Print This!' and 'Print to Excel' buttons, and a note: '*Calculations shown on this page represent costs through yesterday. For up-to-date calculations use "Print Work Order Report" options.'

- To view all the details of the work orders, click on the work order ID number (WOID).
- To send an email to the requester of the work order, click on that requester’s name.
- To view the details of the location of the work order, click on the location.

4. Last 10 Work Requests List: You can view the last ten work orders requested by clicking on the [Last 10 Work Requests](#) link, just below the words “Work Order By Status” on the Home page. See below:

The screenshot shows the top navigation bar with links for Home, Calendar, Work Order, Reports, and My Settings. Below this is a search bar with a 'GO' button and links for 'Advanced Search' and 'Help'. The main content area is divided into two sections. On the left is a 'SPECIAL NOTICE' section with a red arrow pointing to the 'Last 10 Work Requests' link. On the right is the 'WORK ORDERS BY STATUS' section, which includes a 'Last 10 Work Requests' link, a 'Period' dropdown menu set to 'All', and a 'Request Totals' section with a checklist. The 'Request Totals' section shows: 1 New Request (checked), 0 UNASSIGNED, 1 In Approval Process, and 1 Work In Progress (checked). To the right of the checklist is a 3D pie chart titled 'Work In Process' with three segments: orange, green, and purple, each labeled with the number '1'.

This will take you to the Work Order Summary List page, where you will see the last ten requests listed.

- To view all the details of the work orders, click on the work order ID number (WOID).
- To send an email to the requester of the work order, click on that requester's name.
- To view the details of the location of the work order, click on the location.

VII. Closing Work Orders: When It's Time to Move On.

Work orders can be designated as “Complete” or “Closed Work Order”. Generally, if the actual work for the work order is done, you would mark it as “complete” because you may still have labor hours or purchase transactions to add to the work order. Once you add all transactions, however, you would then “close” the work order. Once a work order is closed, you cannot add any other transactions; in order to add transactions, you would need to re-open the work order.



SCHOOLDUDE SAYS: Note that you can NOT delete a work order. This is mainly for record-keeping purposes.

To mark a work order as complete, simply change its status to “Complete”. To close a work order, go in and change the status to “Closed Work Order”. Save your changes by clicking the **Save** button. See below:

Work Order: 101

 << First < Prev Next > Last >>

Status

Complete ▾

Status Date
11/14/2005 1:18:07 PM

Status Last Changed By

Work Order: 101

 << First < Prev Next > Last >>

Status

Closed Work Orders ▾

Status Date
11/14/2005 1:18:07 PM

Status Last Changed By

Closing Work Orders in Batches: You may find, at one time or another, that you want to mark work orders as complete and then close them later in a batch. In this case, do the following:

- Click on the **number** next to the “Complete” status on the Home page to get to the work order summary list.
- The “Batch Close Work Orders” option is on this page in the Shortcuts section. See below:

The screenshot shows the Sloan County Schools MaintenanceDirect interface. A red arrow points to the 'Batch Close Work Orders' shortcut in the 'Analysis Shortcuts' section. Below the shortcuts is a 'Work Order Summary List' table with columns for WOID, Priority, Status, Location, Requested, Completed, and Total. Two work orders are listed: one for Sloan High School and one for Sloan Community College.

WOID	Priority	Status	Location	Requested	Completed	Total
101	Low	Complete	Sloan High School R. Sloan Gymnasium	11/14/2005	11/16/2005 11/16/2005 10:28:27 AM	\$0.00
100	Low	Complete	Sloan Community College	11/7/2005	11/28/2005 11/28/2005 2:32:34 PM	\$0.00

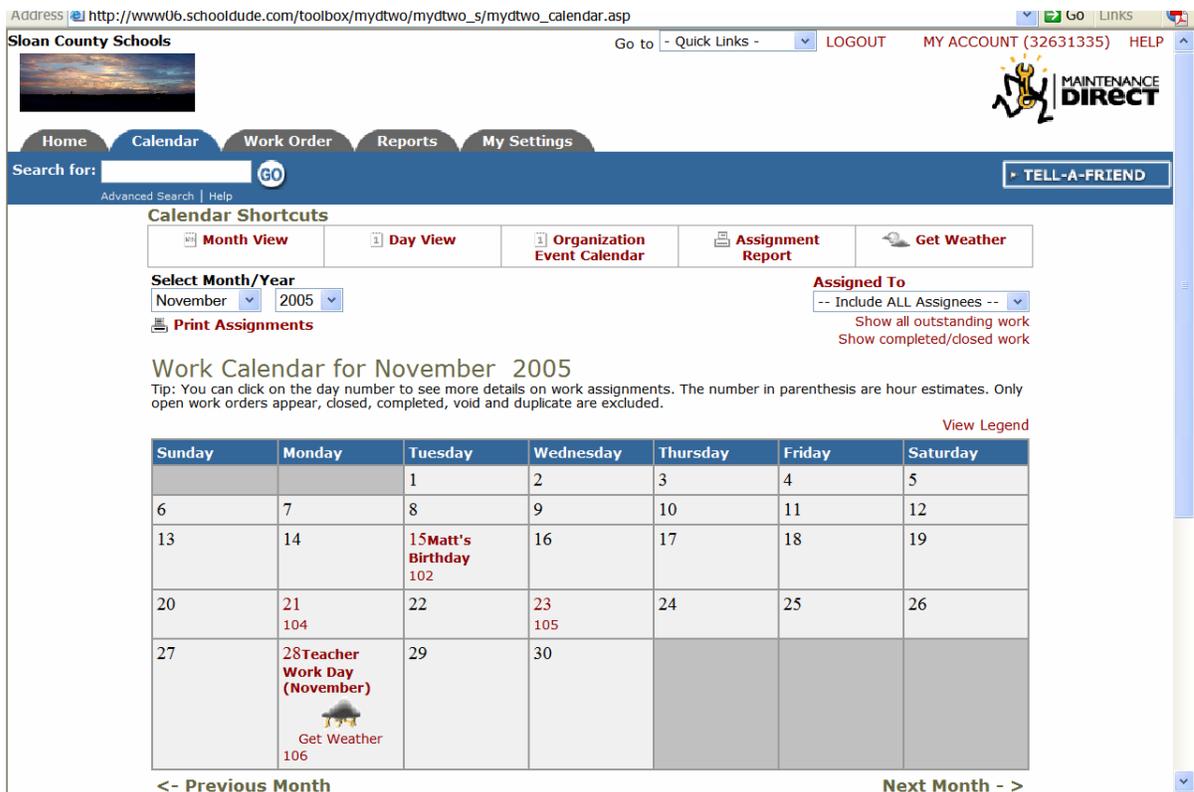
- Click the **Batch Close Work Orders** shortcut to close multiple work orders at a time. You will be able to close ten (10) work orders at a time.
- Select a status from the drop-down box labeled “List Work Orders for Status”.
- Check all work orders that you would like to close. To close all the work orders in the list at once, click the **Check All** box provided.
- To close the work order(s), click the **Submit** button. Please remember to only click the Submit button once. It may take a few seconds to change each of the work orders, but the page will refresh when complete.

VIII. Using the Calendar: See the Big Picture.

As with all other SchoolDude products, MaintenanceDirect has a Calendar tab—a place you can go to see what’s going on, where, when, and who’s involved. You can see, in easy-to-read calendar format, trips occurring on a month-to-month or year-to-year basis. You can even check the weather! In this section of your manual, we’ll show you how to use the calendar and all of its options in the way that works best for you.

- To open up your calendar from wherever you are, click on the **Calendar tab** at the top of your screen.

The page that opens up will look something like this:



The screenshot shows the MaintenanceDirect web interface for Sloan County Schools. At the top, there is a navigation bar with tabs for Home, Calendar, Work Order, Reports, and My Settings. Below this is a search bar and a "GO" button. The main content area is titled "Calendar Shortcuts" and includes buttons for Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather. Below these are dropdown menus for "Select Month/Year" (set to November 2005) and "Assigned To" (set to Include ALL Assignees). There are also links for "Print Assignments" and "Show all outstanding work" / "Show completed/closed work". The main calendar is titled "Work Calendar for November 2005" and includes a tip about clicking on day numbers for details. The calendar grid shows days from Sunday to Saturday, with specific events marked: "15 Matt's Birthday 102" on Tuesday, November 15, and "28 Teacher Work Day (November)" on Friday, November 28. A "Get Weather" link is also present for the 28th. Navigation arrows for "Previous Month" and "Next Month" are at the bottom.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15 Matt's Birthday 102	16	17	18	19
20	21 104	22	23 105	24	25	26
27	28 Teacher Work Day (November) Get Weather 106	29	30			

At the top of your screen, just above the words “Work Calendar for...”, are the **Calendar Shortcuts: Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather.** In this section, we’ll cover each of these shortcuts in turn, starting with the **Month View.**

1. The **Month View** page shows you what’s going on, on a large, easy-to-read calendar, one month at a time. It’s the view that shows automatically when you open up the Calendar page—in other words, the page you’re looking at now.

The month you’re in currently will display with arrows in the bottom left and right-hand corners that you can click on to navigate to the **Previous Month** or **Next Month**. Just below the **Calendar Shortcuts**, you will see two drop-down boxes, one for the month and the other for the year, which serve as another kind of shortcut, allowing you to navigate the large calendar from one month to the next without clicking multiple times on the Previous Month and Next Month buttons.

On the **Month View**, each day shows in the traditional squares of a calendar, which contain any open work orders. Open work orders are those work orders not in the “Complete”, “Closed”, “Void”, or “Duplicate” status.

There are different icons used throughout the MaintenanceDirect **Calendar** page to indicate what kind of work orders the work orders on the calendar are. The legend for these icons is at the bottom of the **Month View** page and looks like this:

			Get weather			
20	21	22	23	24	25	26
27	28	29	30			

<- Previous Month **Next Month - >**

Legend

-  MD Work Order (no icon)
-  PM Work Order
-  FSD Work Order
-  IT Work Order
-  PD Work Order

Tip: Click the day number to view work order details for the entire day or click a work order id to view/edit the work order..

Home Calendar New Work Order Reports Services Account Setup

Click here to go Online!

Work order numbers will be displayed on the calendar as red links. If you click on a work order number, it will take you to the work order update screen. If you see a number in parentheses next to the WOID, that is the “Estimated Hours” for that work order.

If your educational facility or district has PreventiveMaintenanceDirect, PM work orders will show as having a yellow background on the calendar, behind the WOID.

2. The Day View page can be reached in two ways:

- Clicking on the **Day View shortcut** at the top of the page, or
- Clicking on the **number of the date** on the monthly calendar.

The Day View automatically defaults to today's date. It shows you what's going on, one day at a time. On the left-hand side, you will see the work orders for the day you chose to view, who was assigned to each, the WOID number, the Work Order Request Description, the Location Name, and the Estimated Hours (if applicable).

Address: http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_calendar_day.asp?date=11/28/2005&nmonth=11&year=2005

Filtering
View work orders starting by location:
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

Work Orders for Monday 11/28/2005

1 - 2 of total 2 listed Previous 10 Next 10

Assigned To Howard Dude
WOID 106
WO Request Description Two lights out in stairwell.
Location Name Sloan Elementary School
Estimated Hours 0
[Print This!](#)

Assigned To Ben dude
WOID 107
WO Request Description Window broken in Classroom 104.
Location Name Sloan High School
Estimated Hours 0
[Print This!](#)

Previous 10 Next 10

November 2005
S M T W T F S
30 31 1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 1 2 3

Home Calendar Work Order Reports My Settings [Click here to talk to an Online Operator NOW!](#)

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- You can navigate from one day to the next using the small calendar on the right-hand side of the screen (see green arrow above). Simply click the **number** of the day you wish to view. To move from one month to another, use the left and right arrows next to the name of the month at the top of the small calendar (see below).

◀ November 2005 ▶						
S	M	T	W	T	F	S
30	31	1	2	3	4	5
	6	7	8	9	10	11
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

- To print a form for a work order, click on the **Print This** button for the corresponding work order.

3. The **Organization Event Calendar** page is where you can view events, such as school breaks, for locations/organizations within your school or district. They will then be stored on a yearly calendar on the left-hand side of the screen and then listed in more detail on the right-hand side.

You can reach the Organization Event Calendar by clicking on the short cut at the top of the Calendar page.

The Organization Event Calendar page should look something like this:

The screenshot shows the 'Sloan County Schools Organization Event Calendar' page. At the top, there is a navigation bar with 'Home', 'Calendar', 'Work Order', 'Reports', and 'My Settings'. Below this is a search bar and a 'GO' button. The main content area is titled 'Sloan County Schools Organization Event Calendar' and features a 'Calendar Shortcuts' section with buttons for 'Month View', 'Day View', 'Organization Event Calendar', 'Assignment Report', and 'Get Weather'. A 'Location' dropdown menu is set to 'Select Location'. The calendar grid shows the year 2005 with months from January to September. To the right of the calendar is a table of events:

Begin Date	End Date	Event Title	Date Created
10/10/2005	10/14/2005	Fall Break	8/18/2005 9:05:27 AM
11/15/2005	11/15/2005	Matt's Birthday	9/8/2005 10:19:01 AM
11/28/2005	11/28/2005	Teacher Work Day (November)	11/16/2005
12/19/2005	1/6/2006	Christmas Break	9/6/2005 2:33:56 PM
3/28/2006	3/28/2006	Test Event 2	9/6/2005 2:50:43 PM
4/17/2006	4/21/2006	Spring Break	9/6/2005 2:35:47 PM

4. The **Get Weather** shortcut, as with the weather icon on the main monthly calendar and the **Home** page, serves as a link to connect you with AccuWeather.com, where you can check current weather conditions in your area or the area where work orders are being done. You can also check the forecast with a range up to fifteen days.

- Simply click on the **Get Weather** shortcut near the top of the page and a separate browser page will pop up, displaying AccuWeather.com.



- Enter your Zip Code or City/State into the box shown above and click **Go**.

IX. Reports: Listing, Printing, and Graphing Your Work Orders.

SchoolDude provides you with the options of listing, graphing, and printing any and all of the work orders routed to you, along with their information, for your convenience and for your records. Follow the steps in this section and you'll have hard copies and visual aids for all of your work order information at your fingertips.

- The types of reports available in MaintenanceDirect are summarized in the following tables (Keep in mind that all reports may not be available to Supervisor II users):

Budget Codes:

Report Types	Report Information
Summary	The budget summary report will give a summary of all labor hours, labor and material costs, total costs, budget amount, percentage spent, work order count and average hours/cost for each budget code. You can sort the report by budget code or by location.
Detail	The budget detail report will give you a detailed account of each transaction for work orders assigned to the budget codes. You can sort this report by budget code or by location. If you want to have a page break for each budget code or location, check the page break option.
Fiscal Year-end Comparison	The budget year-end comparison will display all the information from the summary report for the current fiscal year, as well as the previous fiscal year. You can sort the report by budget code or location

Classifications:

Report Types	Report Information:
Summary	The classification summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each classification.
Detail	The classification detail report will give you a detailed account of each transaction for work orders assigned the selected classifications.

Crafts:

Report Types	Report Information
Summary	The craft summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each craft. You can sort the report by location or craft.
Detail	The craft detail report will give you a detailed account of each transaction for work orders that are assigned the selected crafts.

Employees:

Report Types	Report Information
Summary Count	The employee summary count will give you a summary of each employee and how many work orders they are assigned in each work order status.
Estimate vs. Actual Analysis	This report will show all estimated and actual employee hours and costs on one report.
Detail Employee Counts	The detail employee count report will give you a listing of all the work orders that an employee has been assigned, as well as a total count. The report will show the work order number, requester, and the description for each work order.
Detail Employee Cost	The detail employee cost lists each employee and their total hours worked, average number of hours per work order, the total cost, the average cost per work order, and the number of work orders.
Employee Productivity	The employee productivity report will list each employee, the work orders assigned to them, and the number of days to complete those work orders. It will also give the total and an average number of days to complete.

Equipment:

Report Types	Report Information
Summary (All)	The equipment summary report will give you summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each piece of equipment.
Detail (All)	The equipment detail report will give you a detailed account of each transaction for work orders assigned the selected equipment.
Summary (Maintenance vs. Preventive Maintenance)	The equipment summary report (maintenance vs. preventive maintenance) will give you a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per piece of equipment. The maintenance and preventive maintenance will be separated for comparison.
Detail (Maintenance vs. Preventive Maintenance)	The equipment detail report (maintenance vs. preventive maintenance) will give you a detailed account of each transaction for work orders that are assigned the selected equipment. The maintenance and preventive maintenance will be separated for comparison.

Equipment Usage:

Report Types	Report Information
Summary (Equipment Costs)	The equipment summary report will give you summary of all usage purchases for each piece of equipment.
Detail (Equipment Costs)	The equipment detail report will give you a detailed account of each usage transaction for work orders assigned the selected equipment.
Summary (Work Order Costs)	The equipment summary report will give you a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per piece of equipment
Detail (Work Order Costs)	The equipment detail report will give you a detailed account of each transaction for work orders that are assigned the selected equipment.

Groups:

Report Types	Report Information
Summary	The group summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each group.
Detail	The group detail report will give you a detailed account of each transaction for work orders that are assigned the selected groups.

Transactions:

Report Types	Report Information
Summary	The transaction summary report will give a total quantity and cost for a group of transactions. For example, you can print a report for a technician for the total number of hours they worked that month. You can also print a report showing all the purchases from a specific supplier. You can sort this report by transaction type or location.
Detail	The transaction detail report will give you the total quantity and cost of a group of transactions, like the summary report. It will also list all the transactions that make up the total cost. You can sort this report by transaction type or location.

Locations:

Report Types	Report Information
Summary	The location summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per location.
Detail	The locations detail report will give you a detailed account of each transaction for work orders assigned the selected locations.

Manufacturers:

Report Types	Report Information
Summary	The manufacturer summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per manufacturer.
Detail	The manufacturers detail report will give you a detailed account of each transaction for work orders assigned to the manufacturers.

Outstanding Work:

Report Types	Report Information
List	This list will display all open work orders that are in the status of “New Request”, “Work in Progress”, or “Pending”.

Projects:

Report Types	Report Information
Summary	The project summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per project.
Detail	The projects detail report will give you a detailed account of each transaction for work orders that are assigned the selected projects.

Purpose:

Report Types	Report Information
Summary	The purpose summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per purpose.
Detail	The purpose detail report will give you a detailed account of each transaction for work orders that are assigned the selected purpose.

Status:

Report Types	Report Information
Summary	The status summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per status.
Detail	The status detail report will give you a detailed account of each transaction for work orders that are assigned the status projects.

Suppliers:

Report Types	Report Information
Master List	The master list will print out all supplier information in list format.
Summary	The supplier summary report will give you a summary of total costs from this supplier.
Detail	The supplier detail report will display all the transactions that make up the total costs from this supplier.

Types:

Report Types	Report Information
Summary	The type of summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per type.
Detail	The type detail report will give you a detailed account of each transaction for work orders assigned the selected types.

Work Load:

Report Types	Report Information
Calendar	This report will take you to the calendar, where you can print an assignment report.

Work Orders:

Report Types	Report Information
Summary	The work order summary report will give you a summary of each employee and the count of how many work orders they are assigned in each work order status.

Summary 2	The work order summary 2 report will give you a listing of all the work orders, based on your criteria. You can sort this list by status, date, work order ID, location, priority, assigned employee, budget, project, purpose, or craft.
Detail	The detail report will give you a full report for each work order in the criteria that you've selected. The detail report is several pages per work order.
Detail Analysis Pivot Graph	The detail analysis pivot graph is available for Microsoft Excel only. It provides a way to customize a work order count report and graph.

Custom Category:

Report Types	Report Information
Summary	The custom category summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each custom category.
Detail	The custom category detail report will give you a detailed account of each transaction for work orders that are assigned the selected custom categories.

Listing:

1. Go to the **Information Analysis** section of MaintenanceDirect, either on the **Home** page, or by clicking on the **Reports** tab from wherever you are in MD. The **Reports** page looks something like this:

Sloan County Schools

Go to - Quick Links - LOGOUT SERVICES MY ACCOUNT (32631335) HELP

Home Calendar New Work Order Reports Services Account Setup

Search for: GO

Advanced Search | Help

TELL-A-FRIEND

Reports

You will find many useful reports in each of the options under "Information Analysis" show on the right.

Benchmarking

How is your department performing? Establish new goals from benchmarking data.

Now, innovative executives can learn from actual success stories and case studies that demonstrate the power of benchmarking--sharing the best practices to set quality standards for topics, problems, and, most importantly, processes. Camp shows how global leaders in manufacturing, service, government, and other areas have used benchmarking to reduce waste, improve quality, and streamline current systems.
Purchase Now!

Graphs

View your data graphically. Bar charts, pie charts, and much more. To make your graph clickable we use Flash. Click [here](#) to download Macromedia Flash Player.

INSTALL NOW

Information Analysis

- Areas
- Budget
- Buildings
- Classifications
- Crafts
- Employees
- Equipment
- Equipment Usage
- Groups
- Locations
- Manufacturers
- Outstanding Work
- Projects
- Priority
- Purpose
- Status
- Suppliers
- Types
- Transactions
- Work Load/Assignment
- Work Order
- Custom Category

Printed Reports

2. Under the **Information Analysis** section, click on the category you wish to list.
3. No matter what category you click, you will find the list link in the **Shortcuts** section, though it may have different names:
 - ✓ Area List
 - ✓ My Budget Codes
 - ✓ My Buildings
 - ✓ My Classifications
 - ✓ Craft List
 - ✓ Employee Status Counts
 - ✓ My Equipment List
 - ✓ My Equipment Usage
 - ✓ My Groups
 - ✓ Transaction List
 - ✓ My Locations
 - ✓ My Manufacturers
 - ✓ Work Order List
 - ✓ My Projects

- ✓ My Priority Codes
- ✓ My Purpose Codes
- ✓ Status List
- ✓ My Suppliers
- ✓ My Types
- ✓ List Custom Category

Printing:

4. After you find the information you want by using the **Information Analysis** menu and clicking the appropriate link, look for the **Print** icon (🖨️) in the **shortcuts** menu. See example below:



- Follow the instructions on the appropriate page (the page blow is shown as an example), filling out the necessary information and choosing the period you wish to print, etc.

Address http://www06.schooldude.com/toolbox/mydtwo/mydtwo_s/mydtwo_transprint.asp Go Links

Sloan County Schools Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar Work Order Reports My Settings

Search for: GO TELL-A-FRIEND

Advanced Search | Help

Transaction Shortcuts

Talk About It! *	Suppliers *	Labor Types	Labor	Purchases
Transaction List	Graph Transactions	Print Transactions		

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Print My Costs by Transaction

1) Select Your Reporting Period

Use Custom Period

Custom Begin

Custom End

2) Choose the type of reporting date:

Request Date

Requested Completion Date

Target Start Date

Target Completion Date

Completion Date

Transaction Date

3) Select Your Transaction Type(s)
(Note: To select multiple hold Ctrl key down.)

-- Include ALL Types --

Labor

Materials

Rental

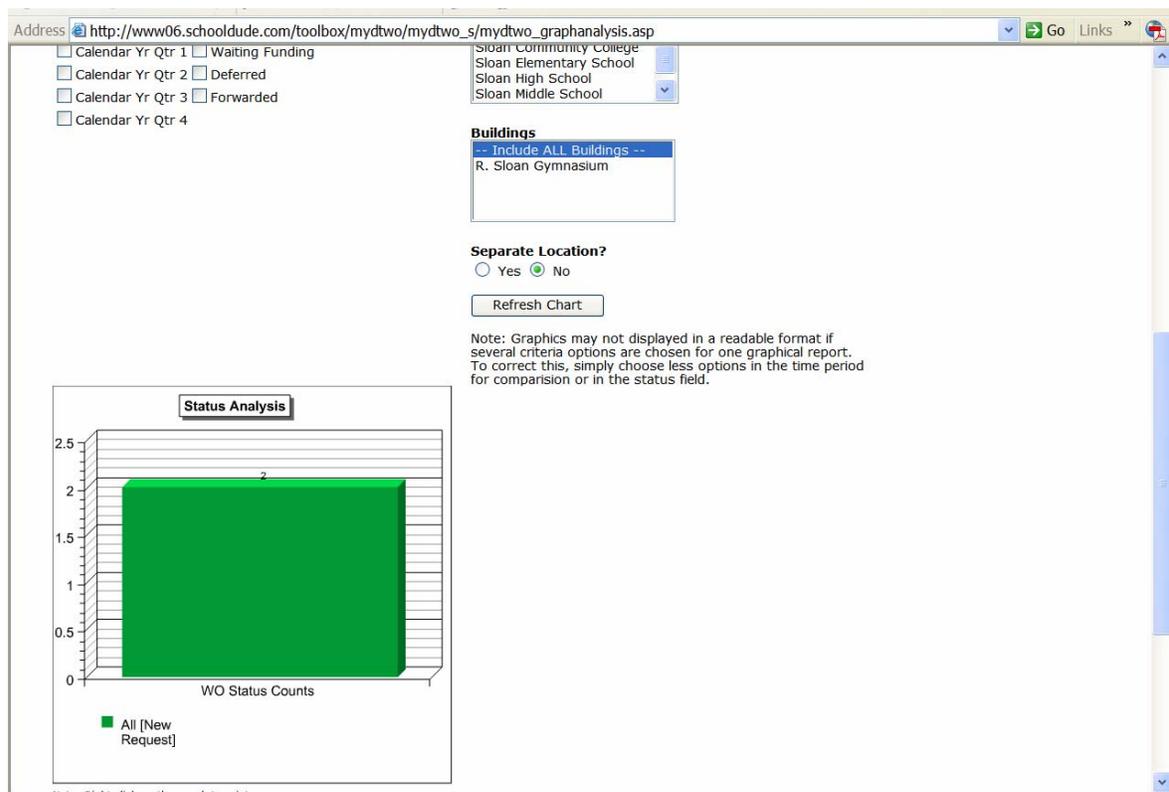
- When you're finished, click the **Print This!** icon at the bottom of the page.

➤ You can also print any page that has a **“Print This!”** icon on it:



Graphing:

- If you wish to view a graph of certain information, follow steps 1 through 3 above, using the **Information Analysis** menu and choosing the category you wish to view. Then do the following:
 - Follow the instructions on the appropriate page, which will take you through the period, priority, location, “Assign to” person, chart title and type, etc.
 - Click the **Refresh Chart** button. A chart will appear at the bottom of the page, graphing out the information you indicated above.
 - Change the information shown on the graph by changing the options above the chart.



Technician

I. Welcome to the Home Page! Now What?

(A quick overview of what's on the Home page.)

Once you've logged in with your user name and password, you're taken directly to your Home page. It should look something like this, once work orders have been entered into the system and assigned to you:

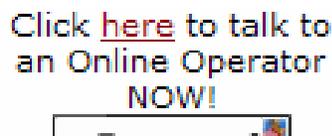
The screenshot shows the MaintenanceDirect web application interface. At the top, there is a navigation bar with tabs for "Home", "Calendar", "New Work Order", "My Requests", and "My Account". The "Home" tab is currently selected. Below the navigation bar is a search bar with a "GO" button and a "TELL-A-FRIEND" link. The main content area is divided into several sections:

- Quick Launch:** A list of links including "New Request", "Your Settings", "Labor Hours", "Purchase Transactions", "User Forum", and "SchoolDude.com site".
- LOGIN HERE:** A message that says "Hello Howard Dude. Not Howard Dude! Please be yourself."
- ASSIGNED WORK:** A section for managing assigned work orders. It includes a note: "Note: Action Taken is saved when Mark Complete button is clicked." Below this are controls for "Sort by" (Request Age) and "Filter" (-- Select Status --). A list shows one work order for "Sloan Elementary School" with the description "106 Two lights out in stairwell." and a "Low" priority. The "Action Taken" field is empty. There are buttons for "Print This!", "Email Supervisor", and "Make a Note". Below the work order details are buttons for "Mark in Progress", "Mark Complete", and "New Request".
- WORK ORDER COUNTS:** A section showing "Request Totals" for the selected period (All), with "1 New Request" and a green semi-circle chart.
- WORK CENTER:** A section with a "CALENDAR" for "11/29/2005 WORK (Tuesday)" and a "Get Today's Weather" link. It also shows "OTHER ASSIGNED WORK" and "TOTAL ASSIGNED WORK" counts, both at "1".

Across the top of the page, you will see that there are five tabs reading: "Home", "Calendar", "New Work Order", "My Requests", and "My Account". Each of these tabs will be discussed in detail further on but for now, let's take a look at the Home page. It contains the following sections:

1. **Quick Launch:** This section provides commonly used links including, New Request, Your Settings, Labor Hours, Purchase Transactions, User Forum (a place to submit questions and/or problems you encounter while using MaintenanceDirect. You can also read questions others have posted.), and SchoolDude.com site.

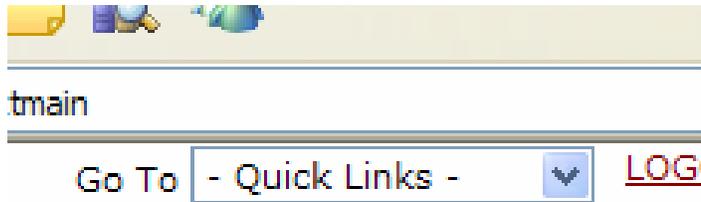
2. **LOGIN HERE**: If you are logged in, you should see your name here. If you do not see your name, click the word “**yourself**” to log in correctly.
3. **ASSIGNED WORK**: In the center of the Home page near the top, you’ll find the Assigned Work section, where all work orders assigned to you will display. From this section, you can view, print, and sort your work orders, as well as make notes, email your supervisor, and mark work orders as “In Progress” or “Complete”. You can also record action taken, see how old a particular work order request is, and record the number of “Today’s Labor Hours”.
4. **WORK ORDER COUNTS**: The graph in this section shows the number of work orders assigned to you by status. To filter the graph by period, select the desired period from the dropdown box provided. The numbers next to each status are the number of work orders currently in that status. Click the **number** to view a list of all work orders in the status.
5. **WORK CENTER**: The Work Center provides links to the monthly calendar as well as today’s work. There is also a link to get today’s weather. The total number of assigned work orders is displayed here, along with the total number of assigned PreventiveMaintenanceDirect work orders (if you are a PreventiveMaintenanceDirect client).
6. **Help** links are available in the bottom right-hand corner of your Home page, as well as at the very bottom of the page, just above your contact information. Clicking on the **Help** link in the top right-hand corner will take you to the MaintenanceDirect manual at any time. If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your Home page. To connect directly with someone from SchoolDude support via Instant Messenger, click on the word “**here**” (underlined and highlighted in red). See



To write and send an email directly to SchoolDude Support, simply click on the Email icon directly below the link we just mentioned. The email link looks like this:



7. **Quick Links** provides you with a way to navigate quickly between SchoolDude products. In other words, if you would like to move from MaintenanceDirect to another product used by your school for whatever reason, all you have to do is click on the Quick Links drop-down box, choose the SchoolDude product you'd like to visit, and you'll be taken to that product's Home page automatically. Quick links is located at the top of the Home page, near the right-hand corner, and looks like this:



8. **Did you know?** : Just a bit of interesting trivia we thought we'd share each day, located at the very bottom of your Home page.

II. My Account: Your Information in a Nutshell.

Before we get started with the nuts and bolts of the work order process, let's take a minute to check out the My Account page, which contains your information as entered by the Administrator during the account setup process. Use this page to edit your information or to change your password.

Your My Account page should look something like this:

Sloan County Schools Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP



Home Calendar New Work Order My Requests My Account

Search for:

Advanced Search | Help

Legend: Indicates required information.
 Account Administrator

Work Order Participant Information

Login Name

First Name

Last Name

Email
 Receive email notifications.

Reports To Ben Dude
(Note: Reports to fields helps supervisors and administrators process and manage work assignments.)

Personnel Type

Phone Number

Fax

Pager

Pager Email Notify electronically by Pager?
(Note: Pager notifications for work requester is not supported. Unit must support text-based electronic notifications. You can test [here](#).)

 Notify Pager Email only for Emergency Work Orders.

Cellular Phone

Cellular Email Notify electronically by Cellular Phone?
(Note: Cellular notifications for work requester is not supported. Unit must support text-based electronic notifications. You can test [here](#).)

 Notify Cellular Email only for Emergency Work Orders.

Change Password

Old Password

New Password

Verify New Password

[Home](#) [Calendar](#) [New Work Order](#) [My Requests](#) [My Account](#)

Conditions of Use | Privacy Policy | Security Statement

[LOGIN](#) [SERVICES](#) [MY ACCOUNT \(32631335\)](#) [HELP](#)

Need help? Call us 1-877-868-DUDE (3833)

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Powered by: 

[Click here to talk to an Online Operator NOW!](#)



- Make any changes you wish to make and click **Done**. If you don't want to change your password at this time, you don't have to. Your changes will be made anyway.
- When you click Done, you will be taken back to your **Home** page.



SCHOOLDUDE SAYS: If you don't see the change immediately, for instance, if you changed the spelling of your name and the spelling hasn't changed under the **Login Here** section, don't worry. Next time you log in, you'll see that the change has been made.

III. New Work Order: MD in Action.

Technicians have the ability to enter new work order requests in MaintenanceDirect. To do so, you will need to click on the **New Work Order** tab at the top of your Home page and fill out the following form on the New Work Request page. You can choose whether or not the new request will be assigned to you or if it will be routed according to your system routes. (Keep in mind that indicates a required field.)

Sloan County Schools Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP



Home Calendar **New Work Order** My Requests My Account

Search for: TELL-A-FRIEND

New Work Request

Welcome
To submit your request complete the following form.

Indicates required information.

Step 1 Location

-- Select Location --
Building
-- Select Building --
Area -- Select Area -- **Area Number**

Step 2 Select Problem Type:

[Click here for Maintenance Emergency Contacts](#)
Click on the problem type below that best describes your issue.

 Athletic Fields	 Audio/Visual	 Cafeteria	 Carpentry
 Climate Control	 Custodial	 Electrical	 Food Services
 Heating/Ventilation /Air Conditioning	 Lighting	 Office Supplies	 Plumbing
<input type="checkbox"/> Windows			

Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
Melissa Dude	919-555-9999

Step 3 Please describe your problem or request.

Step 4 Requested Completion Date

Step 5 Please provide contact information for follow-up questions and notifications.

First Name <input checked="" type="checkbox"/> <input type="text" value="Howard"/>	Last Name <input checked="" type="checkbox"/> <input type="text" value="Dude"/>	Email <input checked="" type="checkbox"/> <input type="text" value="HDude@geewiz.com"/>
Phone <input type="text" value="919-555-1647"/>	Pager <input type="text"/>	Cellular Phone <input type="text"/>

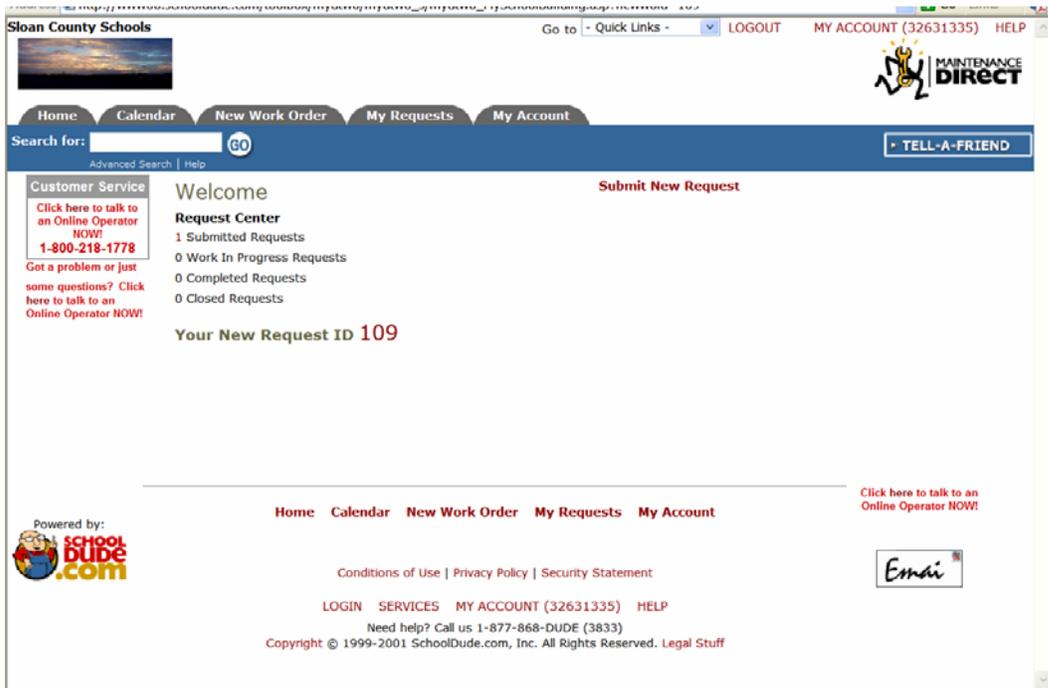
Step 6 Will you perform this work?
 Yes No

Step 7

Home Calendar **New Work Order** My Requests My Account Click here to talk to an Online Operator NOW!

- Enter your **Location**, Area, and Area/Room Number.
- Select the **Problem Type** that best describes your issue. For example, if a toilet is leaking, that would be a plumbing issue. Once you click on a problem type, the page will refresh and your problem type will be highlighted with a red circle. If this is an emergency, check the Maintenance Emergency box below the problem types list.
- **Describe** your problem or request.
- Enter the **Requested Completion Date**. Click the calendar icon next to the date field to choose a date from the calendar.
- Your **Contact Information** (first and last name, email, phone, etc.) will automatically be entered into the fields in step 5.
- If you will **Perform This Work**, click **Yes**. The work order will then be assigned to you. If you would like to submit this work as a new request to be routed to your maintenance department, click **No**.
- Click **Submit**.

➤ You will be taken to the following page, which will show the work order request you just entered and the WOID (Work Order ID number) that it has been assigned.



IV. Searching for Work Orders: Find the Information You Need.

As a Technician, even though you will receive only those work orders that are assigned to you, you have the ability to search for work orders within MaintenanceDirect, using several different methods. You will then be able to see the work order in a view-only format. We will look at each search method individually so you can choose the one that works best for you.

There are four ways to find a work order:

1. Assigned Work
2. Search Using the “Search for” Field
3. Advanced Search
4. Work Order Counts

I. Assigned Work: All open work orders assigned to you will appear in the Assigned Work section of the Home page, fifty at a time. You can sort the list using several fields provided in the “Sort by” drop-down box: WOID (Work Order ID number), Location, Request Age, Request Description, Priority Description, or Status Description. You can also search in ascending or descending order by clicking the green dot for the corresponding choice provided.

Here is a look at the Assigned Work section of the Home page:

The screenshot displays the MaintenanceDirect web interface. At the top, there is a navigation bar with tabs for "Calendar", "New Work Order", "My Requests", and "My Account". Below this is a search bar with a "GO" button and a "TELL-A-FRIEND" link. The main content area is divided into several sections:

- ASSIGNED WORK:** This section contains a note: "Note: Action Taken is saved when Mark Complete button is clicked." It features a "Sort by" dropdown menu set to "Request Age", with radio buttons for "Ascending" and "Descending" (the latter is selected). Below this is a "Filter" dropdown set to "-- Select Status --". A pagination bar shows "1 - 1 of total 1 listed" with navigation links for "First", "Prev 50", "Next 50", and "Last".
- WORK CENTER:** This section includes a "CALENDAR" link, a date "11/29/2005 WORK (Tuesd)", and a "Get Today's Weather" link. It also has links for "OTHER ASSIGNED WORK" and "TOTAL ASSIGNED WORK".
- Work Order Details:** A specific work order is displayed for "Sloan Elementary School" with ID "106". The description is "Two lights out in stairwell." and the priority is "Low". Action buttons include "Print This!", "Email Supervisor", and "Make a Note". A "Low Action Taken" dropdown is present, along with "Mark in Progress", "Mark Complete", and "New Request" buttons. The "Request Age" is "1 (in days)" and it is "Assigned to: Howard Dude Contact".
- WORK ORDER COUNTS:** This section shows a "Period" dropdown set to "All" and a "Request Totals" section with "1 New Request". A large green oval graphic is overlaid on the bottom right of this section.

More About “Assigned Work”...

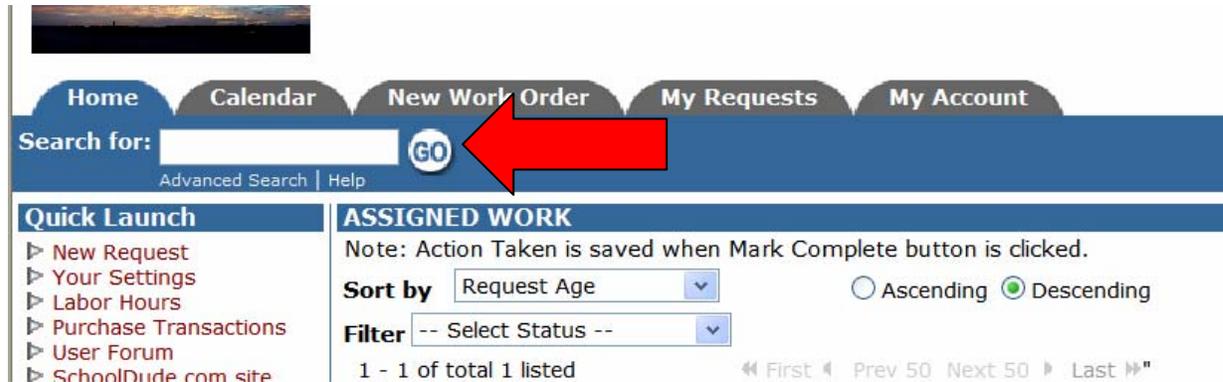
Take note that in this section, as well as searching for work orders, you also have the options of taking several different actions:

- ✓ View the details of a work order or edit it (editing work orders will be discussed in further detail in the next chapter of this manual).
- ✓ Print the work order form, using the “Print This” icon provided ( **Print This!**).
- ✓ Email your supervisor (or other users in the system) by clicking on the Email Supervisor icon provided ( **Email Supervisor**).
- ✓ Add a journal note to a work order by clicking on the “Make A Note” icon ( **Make a Note**).
- ✓ Enter the action taken on a work order using the Action Taken field.
- ✓ Enter “Today’s Labor Hours” in the field provided



SCHOOLDUDE SAYS: To save Action Taken and Today’s Labor Hours, you must click the **Mark Complete** button. Doing this will change the status of the work order to “Complete” and will remove it from the list of open assigned work orders.

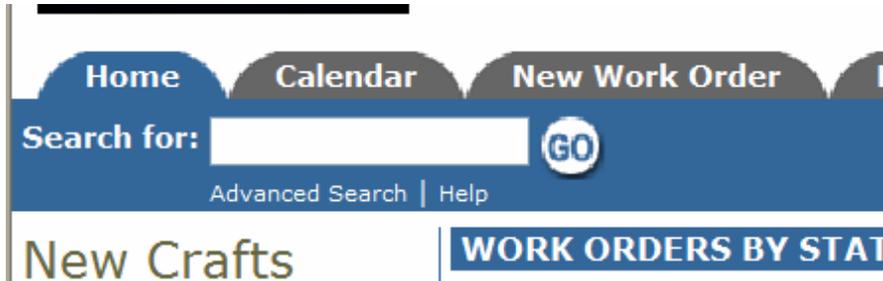
2. Search Using the “Search for” Field: This is the simplest search that you can perform. You can search for work orders using the search text box, located in the blue bar near the top, left-hand side of every page. See below:



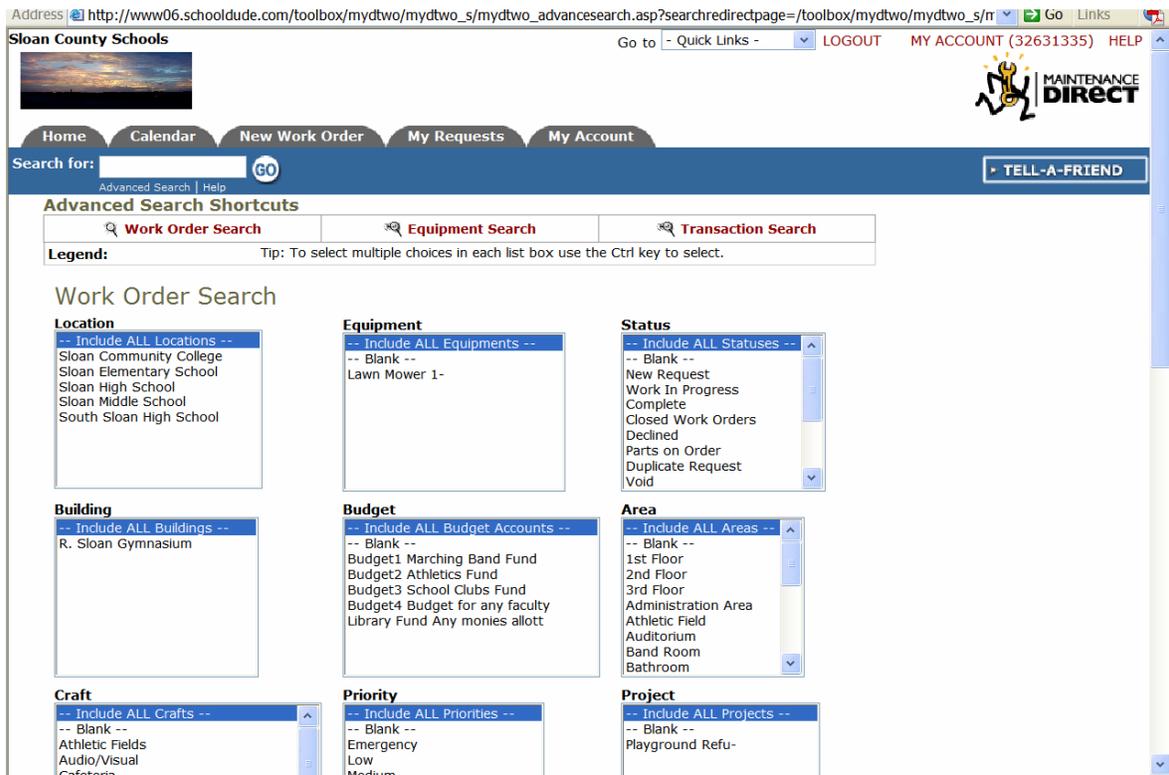
In this box, you can enter a work order number or a key word and click **Go** to search for the work order or information that you need.

For example, if you wanted to find work order #180, you would simply type “180” into the search box and click **Go**. That would then pull up the update page for that particular work order. If there is more than one work order which references work order #180, you would then see a listing of all matching work orders.

- 3. **Advanced Search:** Underneath the search field discussed above, you will see a link that says “Advanced Search”.



- Clicking on this link will take you to the Work Order Search page, which will look something like this:



- On this page, you may choose any combination of search options from the listings and fields provided. Enter your options and click the **Search Now** button.



SCHOOLDUDE SAYS: An example of using the **Advanced Search** would be if you would like to search for all work orders with the status of “Work In Progress” for “Sloan High School” requested in September of 2003. In this case, you would choose “Sloan High School” from the Location list and “Work In Progress” from the Status list. In the request date fields, you would type “9/1/2003” to “9/30/2003” and then click **Search Now**. A list of all work orders that meet those particular criteria would appear. If there was only one work order to meet those criteria, the work order update page for that work order would appear instead of the list.

- To print out the results list, click on the **Print This** icon at the bottom of the results page. To print out a single work order, click on the printer icon () next to the corresponding work order.
- To view a specific work order, click on the work order ID or the description.
- If you would like to send an email to the requester, click on the **requester name** to send an email via your email system (your browser and email must be configured to use “mail to” links).

4. Work Order Counts: You can view all of your work orders that hold a particular status by clicking on the number next to the corresponding status. You can edit the time period that is displayed in this section by selecting a new period from the dropdown box provided. Once you select a period, the page will automatically refresh, showing that period.

See the Work Order Counts section of the Home page below:

The screenshot shows a web browser window with the URL <http://www06.schooldude.com/toolbox/mydtWO/mddefault.asp>. The page is titled "Sloan Elementary School" and displays a "Low" priority work order: "Two lights out in stairwell." The "Request Age" is 1 day, and it is assigned to Howard Dude. The "Action Taken" section includes buttons for "Mark in Progress", "Mark Complete", and "New Request".

The "WORK ORDER COUNTS" section is highlighted with a red arrow. It features a "Period" dropdown menu set to "All" and a "Request Totals" section showing "1 New Request". A pie chart titled "Work In Process" displays a single green slice representing the "New Request" status.

- As work orders are assigned to you and their statuses change as you handle them, you will see more statuses listed in this section (marked by the red arrow above) and more colored sections will appear in the pie chart.

V. Editing Work Orders: Adding Your “Two-Cents”!

Technicians have the ability to edit work orders entered into the system. However, this ability is limited in certain aspects. As a technician, for example, you can add information and details to a work order that you have done work on yourself, but you can't reassign a work order to another user.

To understand the work order itself in order to understand how to edit one, let's take a detailed look at the work order form and just what you can do, as a Technician, to edit it. See below:

The screenshot shows the Sloan County Schools Maintenance Direct web application. The browser address bar displays <http://wwwUb.schoolDude.com/toolbox/mydtWO/mddefault.asp>. The page header includes navigation links for Home, Calendar, New Work Order, My Requests, and My Account. A search bar is present with a "GO" button. The main content area is divided into three columns: Quick Launch, ASSIGNED WORK, and WORK CENTER. The ASSIGNED WORK section displays a list of work orders, with the first one highlighted: Sloan Elementary School, ID 106, with the description "Two lights out in stairwell." A red arrow points to the ID number "106". Below the description are options to Print This!, Email Supervisor, and Make a Note. The status is "Low Action Taken". There are buttons for "Mark in Progress", "Mark Complete", and "New Request". The WORK ORDER COUNTS section shows a "Work In Process" status with a green oval. The WORK CENTER section includes a CALENDAR and a "Get Today's Weather" link.

- To view a work order in detail, click on the **WOID** (Work Order ID number), shown in red. The example above is marked with the red arrow.
- Once you click on the WOID, you will go directly to the work order itself. See example on the next page:

Address: http://www06.schoolde.com/toolbox/mydtwo/mydtwo_s/mydtwo_WOUupdate_tech.asp?woid=106&sql=&strnext=&strprev=&strfirst=8 Go Links

Sloan County Schools Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar **New Work Order** My Requests My Account

Search for: GO TELL-A-FRIEND

Advanced Search | Help

Work Order Shortcuts

Talk About It! *	Suppliers *	New	Request Info	Contact Info	Submit My
Assignment Info	Budget Info	Deferral	Action Taken	Messages	Journal Notes
Transactions	Approval Routing	Attach File	Print Form	Print Details	PM Schedule

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend: **Indicates required information.**
Automatically saves on click.

Quick Links
- Completed Work
- Work in Progress

Work Order: 106

Status
Priority

Status Date
11/28/2005 1:01:49 PM
Status Last Changed By
BenDude

Request Info

Request Date
11/28/2005
Request Description
Two lights out in stairwell.

The work order form contains the following fields as you scroll down the page (fields that you can edit are marked in red and include a description of what can be done):

- **Status:** you can change the status that a work order holds, based on what's been done.
- **Priority:** you can choose the priority of a work order (low, medium, high, emergency, safety, and scheduled).
- Status Date, Created By, and Date Created
- Request Information
- Contact Information
- **Assignment Information:** You can enter the **Actual Completion Date** in this section.
- Deferral Information
- **Budget information:** The **Purpose** of the request is displayed in a dropdown box. If it is incorrect, you can select a new purpose. The purpose is generally "why"

you are performing the work order. For example, if it is a work order for removing graffiti from a wall, the purpose could be “vandalism”. **Craft**, **Custom Category**, **Project**, and **Equipment** can also be selected in their corresponding fields.

- **Action Taken**: Enter the action taken for the work order. The requester will see this information.
- **Message Center**: This section allows you to send an email message regarding the work order to anyone in the system. It will also show email notifications sent out from our servers. To enter a new message, click the **New Message** link.
- **Journal Notes**: This section allows you to post journal notes regarding the work order. You also have the option here of sending out a reminder email for the journal note. To create a new journal note, click the **New Note** link.
- **Transactions**: In this section, you can add and edit Labor and Purchase Transactions. If you have SchoolDude’s InventoryDirect, you will also be able to add and edit Issue Transactions here. Transactions will be discussed in further detail in the next section of this manual.
- Approval Routing
- **File Attachments**: You can attach up to **TWO** files for each work order. They must be 3MB or less each.

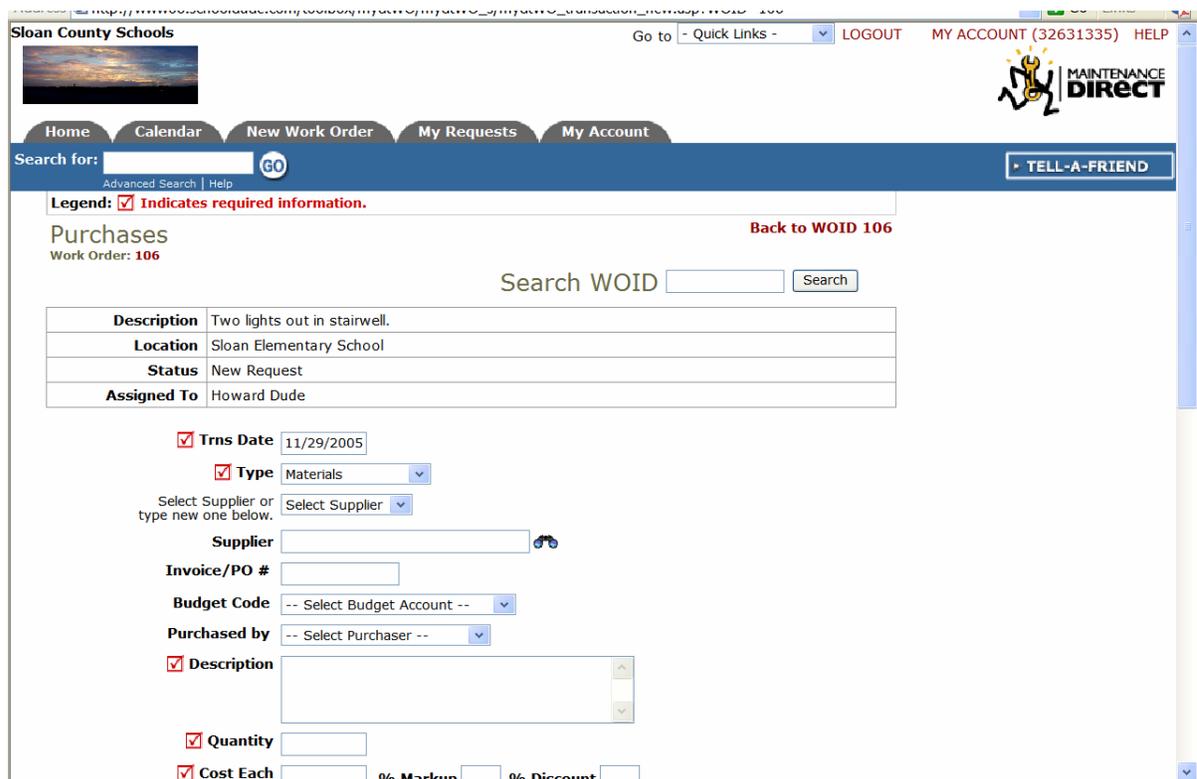
VI. Entering Labor and Purchase Transactions: How Much Was That Again?

The cost of a work order comes, of course, from the labor and purchase transactions attached to it. To track those costs, simply enter them into MaintenanceDirect and our system will organize them for you so that you'll always know exactly how much a work order costs and why.

- To get started with entering labor and purchase transactions, do the following:
- As you saw in the previous section, the second page of a work order contains a Transactions section where you can click one of two links:



- Clicking on the **New Purchase Transaction** link on the work order form will take you to the following page where you can enter and save all of the purchase transaction information for the current work order. See below:



Sloan County Schools Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar **New Work Order** My Requests My Account

Search for: GO TELL-A-FRIEND

Legend: Indicates required information.

Purchases Back to WOID 106
Work Order: 106

Search WOID Search

Description	Two lights out in stairwell.
Location	Sloan Elementary School
Status	New Request
Assigned To	Howard Dude

Trns Date

Type

Select Supplier or type new one below.

Supplier

Invoice/PO #

Budget Code

Purchased by

Description

Quantity

Cost Each % Markup % Discount

☑ Required information fields include Transaction Date, Type, Description, Quantity, and Cost Each.

- Clicking on the **New Labor Transaction** link on the work order form will take you to the following page, where you can enter and save labor transaction information for this particular work order. See below:

The screenshot shows the 'Maintenance Direct' web application interface. At the top, there are navigation links for 'Home', 'Calendar', 'New Work Order', 'My Requests', and 'My Account'. A search bar is present with a 'GO' button. The main content area is titled '106 Sloan Elementary School' and features a calendar for November 2005. Below the calendar is a table for entering labor hours by day, with columns for 'Sat', 'Sun', 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', and 'Total Hours'. Each day has input fields for '0' and 'OT'. A 'Grand Total Hours' section is at the bottom of the table, with 'Save' and 'Reset' buttons. The footer contains the 'SCHOOL DUDE .com' logo, navigation links, and copyright information.

Work Order ID/Location	Work Complete?	Sat Nov 26	Sun Nov 27	Mon Nov 28	Tue Nov 29	Wed Nov 30	Thu Dec 1	Fri Dec 2	Total Hours
106 Sloan Elementary School	<input type="checkbox"/>	0 OT	0 OT	0 OT	0				

- If you need to account for overtime, comp time, holiday time, or any other time, you can click on OT (“Other Time”) next to the corresponding date. A window will appear for you to enter in any other times.
- Click **Save** when you’re done.

You may also use the Quick Launch section of the Home page (shown on the next page) to pull up labor sheets for all your assigned work orders:

Sloan County Schools Go to: Quick Links - LOGOUT MY ACCOUNT (32631335) HELP



Home Calendar New Work Order My Requests My Account

Search for: TELL-A-FRIEND

Advanced Search | Help

Quick Launch

- ▶ New Request
- ▶ Your Settings
- ▶ Labor Hours
- ▶ Purchase Transactions
- ▶ Equipment Usage
- ▶ User Forum
- ▶ SchoolDude.com site

LOGIN HERE

Hello Howard Dude
Not Howard Dude? Please be yourself.

ASSIGNED WORK

Note: Action Taken is saved when Mark Complete button is clicked.

Sort by Request Age Ascending Descending

Filter -- Select Status --

1 - 2 of total 2 listed « First Prev 50 Next 50 Last »

Sloan Elementary School

106 Two lights out in stairwell.

Request Age: 78 (in days)
Assigned to: Howard Dude
Contact:


Low
Action Taken

Today's Labor Hours

Sloan Community College

Area: 2nd Floor

109 Thermostat needs repair.

Request Age: 76 (in days)
Assigned to: Howard Dude
Contact: Howard Dude
Phone: 919-555-1647. Pager:


Medium
Action Taken

WORK CENTER

CALENDAR

2/14/2006 WORK (Tuesday)

 [Get Today's Weather](#)

OTHER ASSIGNED WORK 2

TOTAL ASSIGNED WORK 2



VII. My Requests: Keeping Track of Your Requests.

The My Requests page allows gives you a look at all the work requests you've made in MaintenanceDirect. You can reach the My Requests page by clicking on the tab at the top of the Home page. It should look something like this, depending on how many requests you've submitted:

Sloan County Schools

Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar New Work Order My Requests My Account

Search for: GO

Advanced Search | Help

Legend: Click to sort table by that column.

My Requests + Add New Work Order

1 - 1 of total 1 listed Previous 10 Next 10

Status <input type="checkbox"/>	Location <input type="checkbox"/>	Action Taken <input type="checkbox"/>	Request Date <input type="checkbox"/>	Complete Date <input type="checkbox"/>
Area <input type="checkbox"/>	Description <input type="checkbox"/>	Type <input type="checkbox"/>		
Area Number <input type="checkbox"/>				
New Request 2nd Floor	Sloan Community College 109 Thermostat needs repair.	No Action Note	11/30/2005	Climate Control

+ Add New Work Order Previous 10 Next 10

Print This!

Powered by: SCHOOL DUDE .com

Home Calendar New Work Order My Requests My Account

Click here to talk to an Online Operator NOW!

Conditions of Use | Privacy Policy | Security Statement

LOGIN SERVICES MY ACCOUNT (32631335) HELP

Need help? Call us 1-877-868-DUDE (3833)

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- Each request you make will be added to this list, where you can check its current status, the date you submitted it, and any Action notes that have been made.
- You can print your requests using the **Print This!** icon near the bottom of the page (**Print This!**).
- Add a new work order by clicking the **+Add New Work Order** icon provided at the top right-hand corner of the My Requests list. You will then be taken to the New Work Request page.

VIII. Closing Work Orders: When It's Time to Move On.

Work orders can be designated as “Complete” or “Closed Work Order”. “Complete” work orders can be designated when you enter your labor hours from the Home page. To mark a work order as a “Closed Work Order”, you will have to open the “long form” of the work order so you can change the status box. Generally, if the actual work for the work order is done, you would mark it as “complete” because you may still have labor hours or purchase transactions to add to the work order. Once you add all transactions, however, you would then “close” the work order. Once a work order is closed, you cannot add any other transactions; in order to add transactions, you would need to re-open the work order.



SCHOOLDUDE SAYS: Note that you can NOT delete a work order. This is mainly for record-keeping purposes.

To mark a work order as complete, simply change its status to “Complete”. To close a work order, go in and change the status to “Closed Work Order”. Save your changes by clicking the **Save** button. See below:

Work Order: 101

 << First < Prev Next > Last >>

Status

▾

Status Date
11/14/2005 1:18:07 PM

Status Last Changed By

Work Order: 101

Save

Reset

◀◀ First ◀ Prev Next ▶ Last ▶▶

Status

Closed Work Orders ▼

Status Date

11/14/2005 1:18:07 PM

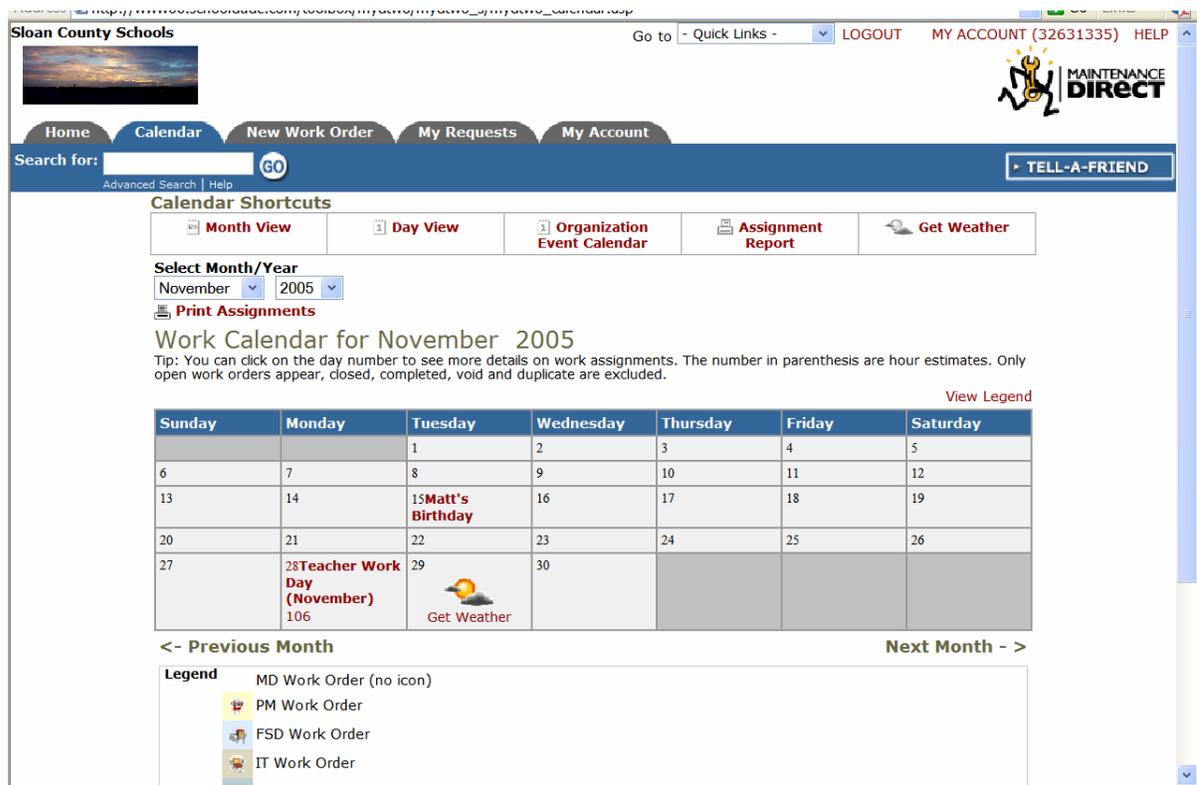
Status Last Changed By

IX. Using the Calendar: See the Big Picture.

As with all other SchoolDude products, MaintenanceDirect has a **Calendar** tab—a place you can go to see what’s going on, where, when, and who’s involved. You can see, in easy-to-read calendar format, trips occurring on a month-to-month or year-to-year basis. You can even check the weather! In this section of your manual, we’ll show you how to use the calendar and all of its options to keep you up to speed on your work load.

- To open up your calendar from wherever you are, click on the **Calendar** tab at the top of your screen.

The page that opens up will look something like this:



The screenshot shows the MaintenanceDirect interface for Sloan County Schools. At the top, there are navigation tabs: Home, Calendar, New Work Order, My Requests, and My Account. A search bar is located below the tabs. The main content area is titled "Calendar Shortcuts" and includes buttons for Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather. Below this, there is a "Select Month/Year" section with dropdown menus for "November" and "2005", and a "Print Assignments" button. The main calendar is titled "Work Calendar for November 2005" and includes a tip: "Tip: You can click on the day number to see more details on work assignments. The number in parenthesis are hour estimates. Only open work orders appear, closed, completed, void and duplicate are excluded." The calendar table shows the following data:

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15 Matt's Birthday	16	17	18	19
20	21	22	23	24	25	26
27	28 Teacher Work Day (November) 106	29  Get Weather	30			

Below the calendar, there are navigation links for "< - Previous Month" and "Next Month - >". A legend section is also present, listing work order types: MD Work Order (no icon), PM Work Order, FSD Work Order, and IT Work Order.

At the top of your screen, just above the words “Work Calendar for...”, are the Calendar Shortcuts: Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather. In this section, we’ll cover each of these shortcuts in turn, starting with the Month View.

1. The **Month View** page shows you what’s going on, on a large, easy-to-read calendar, one month at a time. It’s the view that shows automatically when you open up the Calendar page—in other words, the page you’re looking at now.

The month you’re in currently will display with arrows in the bottom left and right-hand corners that you can click on to navigate to the **Previous Month** or **Next Month**. Just below the **Calendar Shortcuts**, you will see two drop-down boxes, one for the month and the other for the year, which serve as another kind of shortcut, allowing you to navigate the large calendar from one month to the next without clicking multiple times on the Previous Month and Next Month buttons.

- On the **Month View**, each day shows in the traditional squares of a calendar, which contain any open work orders assigned to you. Open work orders are those work orders not in the “Complete”, “Closed”, “Void”, or “Duplicate” status.
- There are different icons used throughout the MaintenanceDirect **Calendar** page to indicate what kind of work orders the work orders on the calendar are. The legend for these icons is at the bottom of the **Month View** page and looks like this:

			Get weather			
20	21	22	23	24	25	26
27	28	29	30			

< - Previous Month
Next Month - >

Legend

- MD Work Order (no icon)
- PM Work Order
- FSD Work Order
- IT Work Order
- PD Work Order

Tip: Click the day number to view work order details for the entire day or click a work order id to view/edit the work order..

- Work order numbers will be displayed on the calendar as red links. If you click on a work order number, it will take you to the work order update screen. If you see a number in parentheses next to the WOID, that is the “Estimated Hours” for that work order.
- If your educational facility or district has PreventiveMaintenanceDirect, PM work orders will show as having a yellow background on the calendar, behind the WOID.

2. The Day View page can be reached in two ways:

- Clicking on the **Day View shortcut** at the top of the page, or
- Clicking on the **number** of the date on the monthly calendar, if that day's number is shown in **red** (you can only reach the Day View this way if you have work orders assigned to you on that particular day).

The Day View automatically defaults to today's date. It shows you what's going on, one day at a time. If you have no work orders assigned for a particular day, the words "There are no assigned Work Orders for this day" will be shown. If you do have work orders, however, you will see your work orders for the day displayed on the left-hand side, along with the WOID number, the Work Order Request Description, the Location Name, and the Estimated Hours (if applicable). See red arrow below:

The screenshot shows the Sloan County Schools Maintenance Direct website. The page title is "Sloan County Schools" and the main navigation includes "Home", "Calendar", "New Work Order", "My Requests", and "My Account". A search bar is present with a "GO" button. Below the navigation is a "Calendar Shortcuts" section with buttons for "Month View", "Day View", "Organization Event Calendar", "Assignment Report", and "Get Weather". A "Filtering" section allows users to view work orders starting by location, with a dropdown menu for "November 2005" and a small calendar grid. The main content area displays "Work Orders for Monday 11/28/2005" with a list of 1 work order. The details for the first work order are shown, including "Assigned To: Howard Dude", "WOID: 106", "WO Request Description: Two lights out in stairwell.", "Location Name: Sloan Elementary School", and "Estimated Hours: 0". A "Print This!" button is also visible. A red arrow points to the work order details, and a green arrow points to the small calendar on the right.

- You can navigate from one day to the next using the small calendar on the right-hand side of the screen (see green arrow above). Simply click the **number** of the day you wish to view. To move from one month to another, use the left and right arrows next to the name of the month at the top of the small calendar (see next page).

◀ November 2005 ▶						
S	M	T	W	T	F	S
30	31	1	2	3	4	5
	6	7	8	9	10	11
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3

- To print a form for a work order, click on the [Print This](#) button for the corresponding work order.

3. The **Organization Event Calendar** page is where you can view events, such as school breaks, for locations/organizations within your school or district. They will then be stored on a yearly calendar on the left-hand side of the screen and then listed in more detail on the right-hand side.

You can reach the Organization Event Calendar by clicking on the short cut at the top of the Calendar page.

The **Organization Event Calendar** page should look something like this, depending on how many events have been entered to this point:

Sloan County Schools Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar New Work Order My Requests My Account

Search for:

Calendar Shortcuts

Location: -- Select Location --

2005 Sloan County Schools Organization Event Calendar

Show Only Shared Events

1 - 6 of total 6 listed Previous 20 Next 20

Begin Date	End Date	Event Title	Date Created
10/10/2005	10/14/2005	Fall Break	8/18/2005 9:05:27 AM
11/15/2005	11/15/2005	Matt's Birthday	9/8/2005 10:19:01 AM
11/28/2005	11/28/2005	Teacher Work Day (November)	11/16/2005
12/19/2005	1/6/2006	Christmas Break	9/6/2005 2:33:56 PM
3/28/2006	3/28/2006	Test Event 2	9/6/2005 2:50:43 PM
4/17/2006	4/21/2006	Spring Break	9/6/2005 2:35:47 PM

4. The **Get Weather** shortcut, as with the weather icon on the main monthly calendar and the **Home** page, serves as a link to connect you with AccuWeather.com, where you can check current weather conditions in your area or the area where work orders are being done. You can also check the forecast with a range up to fifteen days.

- Simply click on the **Get Weather** shortcut near the top of the page and a separate browser page will pop up, displaying AccuWeather.com.



- Enter your Zip Code or City/State into the box shown above and click **Go**.

Site Administrator

I. Welcome to the Home Page! Now What?

(A quick overview of what's on the Home page.)

Once you've logged in with your user name and password, you're taken directly to your Home page. It should look something like this:

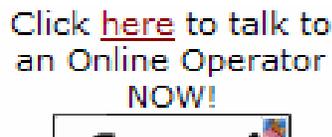
The screenshot shows the Maintenance Direct website interface. At the top, there is a navigation bar with tabs for Home, My Requests, New Request, Approval, and My Settings. A search bar is located below the navigation bar. The main content area is divided into three columns: LOGIN HERE, REQUESTS, and WORK CENTER. The LOGIN HERE section displays a greeting and a warning. The REQUESTS section shows a dropdown for Period (All) and a Request Totals table with 0 New Request, 0 Approved, and 0 Declined. Below this is a section for REQUESTED WORK with a sort by dropdown (Request Date) and radio buttons for Ascending and Descending. The WORK CENTER section includes links for UNAPPROVED EMERGENCIES, Information Analysis, My Requests, Approved Work Orders, and Work Orders. A footer contains navigation links and a 'Click here to talk to an Online Operator NOW!' link.

Across the top of the page, you will see that there are five tabs reading: “Home”, “My Requests”, “New Request”, “Approval”, and “My Settings”. Each of these tabs will be discussed in detail further on but for now, let’s take a look at the Home page. It contains the following sections:

1. **LOGIN HERE**: If you are logged in, you should see your name here. If you do not see your name, click the word “yourself” to log in correctly.
2. **REQUESTS**: The graph in this section (it will show once work orders have been entered for your assigned location) shows the number of work requests for your location(s) by status. To filter the graph by period, select the desired period from the

dropdown box. The numbers next to each status are the number of work orders currently in that status. Click the number to view a list of all work orders in the status.

3. **REQUESTED WORK**: All work orders from you location(s) waiting for approval will display in the requested work section. From this section, you can add action taken and approve or decline the work order. Enter your text in the Action Taken field and save it by clicking either the **Approve** or the **Decline** button.
4. **WORK CENTER**: The Work Center provides a link to the number of unapproved requests you've submitted with the status of "emergency".
5. **Information Analysis**: This section contains links to access lists of your request, all approved requests, and all work orders. These reports will be limited to your assigned location(s).
6. **Help** links are available in the bottom right-hand corner of your Home page, as well as at the very bottom of the page, just above your contact information. Clicking on the **Help** link in the top right-hand corner will take you to the MaintenanceDirect manual at any time. If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your Home page. To connect directly with someone from SchoolDude support via Instant Messenger, click on the word "here" (underlined and highlighted in red). See below:

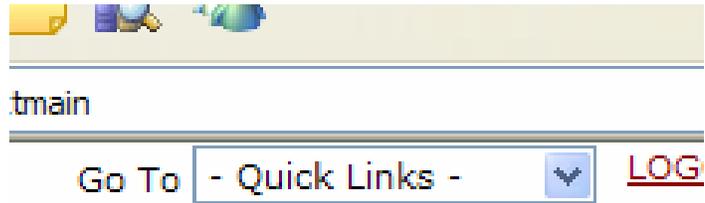


To write and send an email directly to SchoolDude Support, simply click on the Email icon directly below the link we just mentioned. The email link looks like this:



7. The **Quick Links** provide you with a way to navigate quickly between SchoolDude products. In other words, if you would like to move from MaintenanceDirect to another product used by your school for whatever reason, all you have to do is click on the Quick Links drop-down box, choose the SchoolDude product you'd like to visit, and you'll be taken to that product's

Home page automatically. Quick links is located at the top of the Home page, near the right-hand corner, and looks like this:



8. **Did you know?** : Just a bit of interesting trivia we thought we'd share each day, located at the very bottom of your Home page.

II. My Settings: Your Information in a Nutshell.

Before we get started with the nuts and bolts of the work order process, let's take a minute to check out the **My Settings** page, which contains your information as entered by the Administrator during the account setup. Use this page to edit your information or to change your password.

Your My Settings page should look something like this:

Sloan County Schools

Go to: Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home My Requests New Request Approval My Settings

Search for: GO TELL-A-FRIEND

Legend: Indicates required information.
 Account Administrator

Work Order Participant Information

Login Name

First Name

Last Name

Email
 Receive email notifications.

Reports To
(Note: Reports to fields helps supervisors and administrators process and manage work assignments.)

Personnel Type

Phone Number

Fax

Pager

Pager Email Notify electronically by Pager?
(Note: Pager notifications for work requester is not supported. Unit must support text-based electronic notifications. You can test [here](#).)

 Notify Pager Email only for Emergency Work Orders.

- Make any changes you wish to make and click **Done**. If you don't want to change your password at this time, you don't have to. Your changes will be made anyway.
- When you click Done, you will be taken back to your **Home** page. Your changes have been made.



SCHOOLDUDE SAYS: If you don't see the change immediately, for instance, if you changed the spelling of your name and the spelling hasn't changed under the **Login Here** section when the page refreshes, don't worry. Next time you log in, you'll see that the change has been made.

III. The Work Order Request: MD in Action.

To understand what is involved with creating your own work orders as well as editing and approving the work orders that are routed to you, we'll take a look first at the work order request form itself and the fields it contains. The work order request form can be reached by clicking the **New Request** tab at the top of the Home page.

Home My Requests **New Request** Approval My Settings

Search for: GO

Advanced Search | Help

TELL-A-FRIEND

Analysis Shortcuts

My Requests	Approved Work Orders	Work Order List	Print Work Order Report
-----------------------------	--------------------------------------	---------------------------------	---

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

New Work Request

Welcome
To submit your request complete the following form.

Indicates required information.

Step 1 Location

Sloan Elementary School

Building
-- No Building Available --

Area
-- Select Area --

Area Number

Step 2 Select Problem Type:

Click [here](#) for Maintenance Emergency Contacts
Click on the problem type below that best describes your issue.

Athletic Fields	Audio/Visual	Cafeteria	Carpentry
Climate Control	Custodial	Electrical	Food Services
Heating/Ventilation /Air Conditioning	Lighting	Office Supplies	Plumbing

Windows

Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
Melissa Dude	919-555-9999

Step 3 Please describe your problem or request.

Step 4 Requested Completion Date

Step 5 Please provide contact information for follow-up questions and notifications.

First Name <input checked="" type="checkbox"/>	Last Name <input checked="" type="checkbox"/>	Email <input checked="" type="checkbox"/>
Jill	Dude	jilldude@geewiz.com
Phone	Pager	Cellular Phone
919-555-1111	<input type="text"/>	<input type="text"/>

Step 6 File Attachments

Attach New File (Maximum allowed is two attachments with a size of 3MB or less per file.)

Step 7 Action Taken

Action taken communicates your action reason to those involved with this work request. It is optional.

Step 8

Your new requests are automatically shown as approved by you on submit when this request is routed to you by the system.

In order to create a new work request, follow these steps:

- Enter your **Location**, Building, Area, and Area Number.
- Select the **Problem Type** that best describes your issue. For example, if a toilet is leaking, that would be a plumbing issue. Once you click on a problem type, the page will refresh and your problem type will be highlighted with a red circle. If this is an emergency, check the Maintenance Emergency box below the problem types list.
- **Describe** your problem or request.
- Enter the **Requested Completion Date**. Click the calendar icon next to the date field to choose a date from the calendar.
- Your **Contact Information** (first and last name, email, phone, etc.) will automatically be entered into the fields in step 5.
- Attach any files you wish to include with this work request. You can attach up to **TWO** files (3MB or less per file) per work request.
- Enter any action taken on this work request (if applicable). Action taken communicates your action reason to those involved with this work request.
- Click **Submit**.
 - Once you click Submit, you will be taken to the **Work Order Summary List** page, where you will see that your request has been added to the list of all new work order requests in the system.
 - Clicking on the **WOID** (Work Order ID number, shown in red) will take you to the **Approval Process for WOID ...** page, which will show you where the work order is in the approval routing process so you can check its progress.

IV. My Requests: Keeping Track of Your Requests.

The My Requests page allows gives you a look at all the work requests you've made in MaintenanceDirect. You can reach the My Requests page by clicking on the tab at the top of the Home page. It should look something like this, depending on how many requests you've submitted:

Sloan County Schools

Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home My Requests New Request Approval My Settings

Search for: GO

Advanced Search | Help

TELL-A-FRIEND

Analysis Shortcuts

- My Requests
- Approved Work Orders
- Work Order List
- Print Work Order Report

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend: Click to sort table by that column. A second click on the same label will reverse the sort.

Filtering

View work orders starting by location:
0 1 2 3 4 5 6 7 8 9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z ALL

My Requests

Note: My Requests are work requests that you have submitted. To see all click Work Order List on the shortcut menu.

1 - 2 of total 2 listed

WOID	Status	Location	Requested	Completed
Priority	Requester	Building	Target	Status Chg
Craft	Assigned To	Area	Area Number	Action Taken
Description				
108 Medium Carpentry	Work In Progress Jill Dude Ben Dude	Sloan Elementary School 1st Floor	11/30/2005	11/30/2005 1:37:22 PM
Door of classroom 123 broken.				
105 Low	New Request Jill Dude	Sloan Elementary School	11/23/2005	11/23/2005 3:25:49 PM
Broken doorknob on library office door.				

- Each request you make will be added to this list, where you can check its current status, who it's been routed to, the date you submitted it, and any Action notes that have been made.
- You can print your requests using the **Print This!** icon near the bottom of the

page ( **Print This!**) or the **Print To Excel** icon ( **Print to Excel**) right next to it.

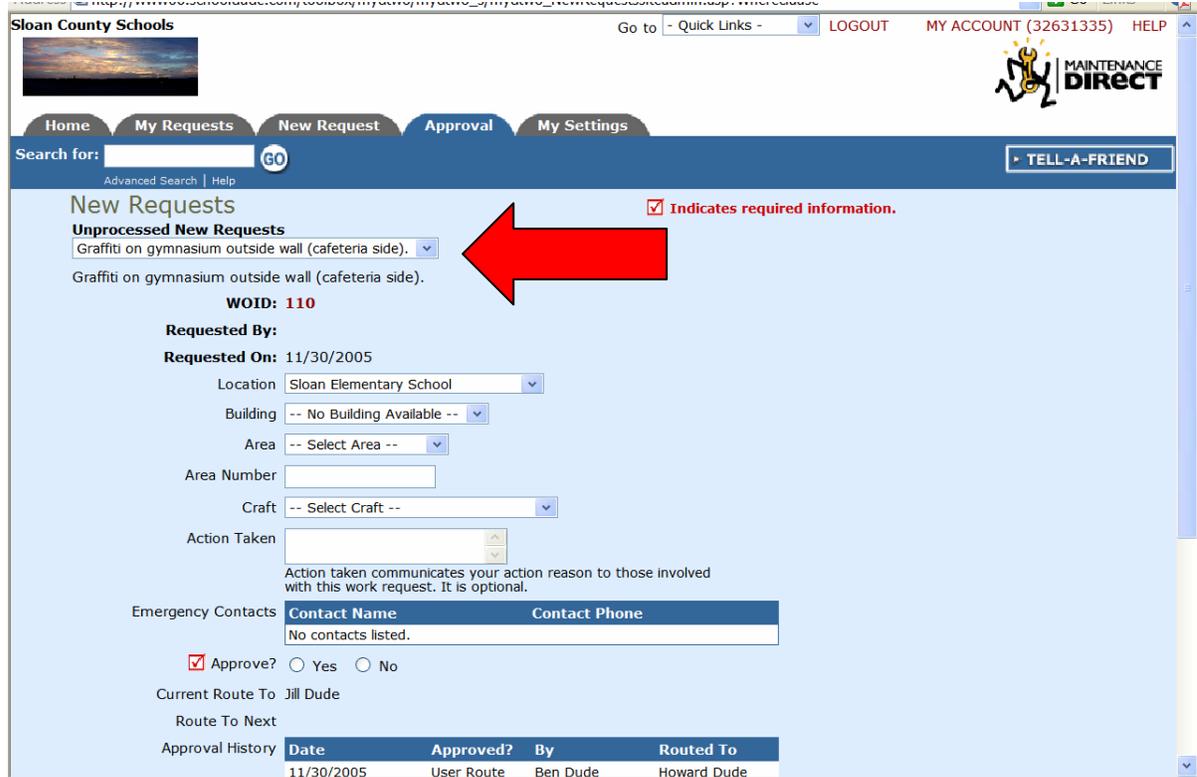
V. Approving Work Orders: Get the Wheels Turning.

As a Site Administrator in MaintenanceDirect, your main responsibility is the processing of work order requests for your location. You'll take a look at each request as it comes in, decide whether to approve or decline it, and then move it on down the line, routing it to go to whoever will carry it out. Don't worry—it's easy!

There are 2 places you can go to process work requests: The **New Requests** page and the **Requested Work** section of the **Home** page. We'll cover each in turn, starting with the **New Requests** page.

I. The **New Requests** page allows you to process a request by taking a look at the request form itself, making any changes to the details of the request that you'd like to make, and then approving or declining it.

- To access the **New Requests** page, click on one of two links on the Home page: The **number** next to "New Request" in the **Requests** section OR the **Approval** tab at the top of the page.
- The **New Requests** page should look something like this, depending on the number of requests that have been routed to you:



The screenshot shows the 'New Requests' page in the MaintenanceDirect system. The page title is 'New Requests' and it displays 'Unprocessed New Requests'. A red arrow points to a dropdown menu containing the text 'Graffiti on gymnasium outside wall (cafeteria side)'. Below this, the request details are shown: 'WOID: 110', 'Requested By:', 'Requested On: 11/30/2005', 'Location: Sloan Elementary School', 'Building: -- No Building Available --', 'Area: -- Select Area --', 'Area Number:', 'Craft: -- Select Craft --', and 'Action Taken:'. There is a note: 'Action taken communicates your action reason to those involved with this work request. It is optional.' Below this, there is a table for 'Emergency Contacts' with columns 'Contact Name' and 'Contact Phone', and the text 'No contacts listed.' There are radio buttons for 'Approve?' (checked), 'Yes', and 'No'. Below that, 'Current Route To: Jill Dude' and 'Route To Next:' are shown. At the bottom, there is an 'Approval History' table with columns 'Date', 'Approved?', 'By', and 'Routed To'.

Date	Approved?	By	Routed To
11/30/2005	User Route	Ben Dude	Howard Dude

- As you can see, the New Requests page displays one work order request at a time, starting with the oldest. At this point, you have the option of either processing the current new request OR choosing a different new request to process first by selecting it from the **Unprocessed New Requests drop-down box** provided at the top of the page (see red arrow on previous page).

The New Request form contains the following fields, which you can fill in or edit if needed (Keep in mind that fields marked with are required; the rest are optional):

- **WOID:** This is the work order ID number assigned to the new request. This number is automatically assigned by the system, starting with 100.
- **Requested By and On:** The person that made the request and the date the request was made.
- **Location:** The location of the request is displayed in a drop-down box. If it is incorrect, select a new location from the options provided. You will only be able to select your location(s).
- **Area:** The area of the request is displayed in a drop-down box. If it is incorrect, select a new area.
- **Area Number:** the area number of the request. If it is incorrect, type in a new area number.
- **Craft:** The craft (problem type) of the request is displayed in a drop-down box. You know the drill.
- **Action Taken:** This is a note field used to let the requester know what is being done with their work order request. For example, if you are declining the work order, you can enter a reason for doing so for your requesters.
- **Approve:** If you are approving this work order, click **Yes**. If not, click **No**.
- **Current Route To:** the user that the work order is currently routed to will be listed here.
- **Route to Next:** This is the user that the work order will be routed to next. This is determined by the routing system set up by your account Administrator.
- **Approval History**
- Click **Submit** to save your changes and approve/decline the work order.
- To remove all the changes you just made, click **Reset**.

2. Requested Work: This is generally a quicker way to process new requests for two reasons. First, you can simply approve or decline a request on the **Home** page with minimal input by clicking Approve or Decline or you can click on the WOID (shown in red), which will take you to the **Update Work Request** page.

- To approve or decline a work request without ever leaving the **Home** page, simply scroll down the list of requests in the Requested Work section and address one at a time. Describe any actions being taken in the **Action Taken** box provided and click the **Approve** or **Decline** button provided.
- To process a request listed in the Requested Work section in a bit more detail, click on that request's **WOID number**, shown in red near the top left-hand corner of each request. Continue with the following steps.
- After clicking on the work order ID number (WOID), you will be taken to the **Update Work Request** page, where you can scroll down and make any changes you wish to make or update any information you'd like to include. Required fields are marked with a .
- Make note of any **action taken** in the field provided.
- Click the **Approve** button to approve the request, the **Reject** button to reject it, or the **Submit** button to save the changes you've made to the request without approving or rejecting it.

Requester

I. So You're a Requester! Now What?

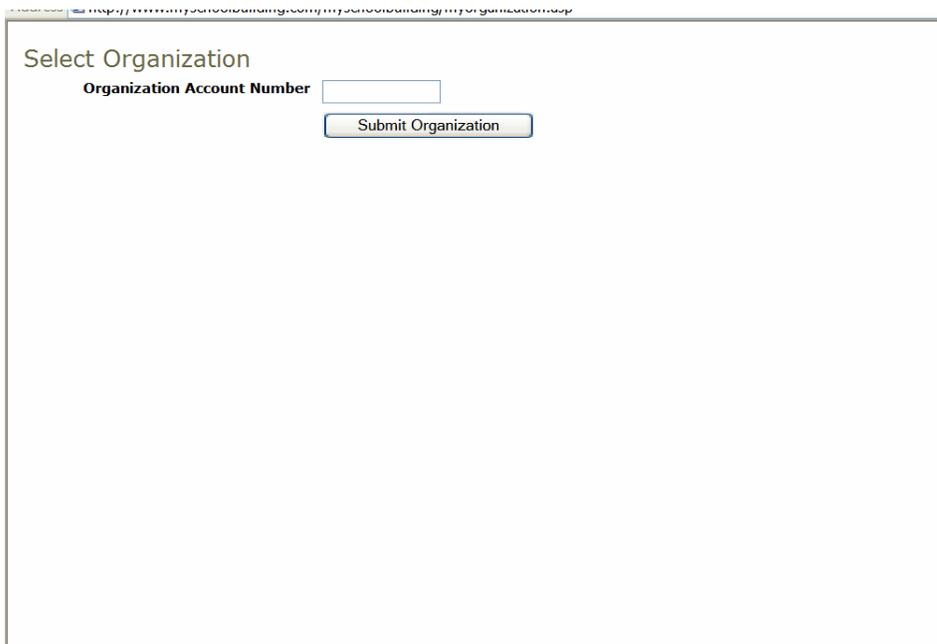
(Getting started with MySchoolBuilding.com.)

MySchoolbuilding.com is where you as a Requester will go to make all of your new work order requests. There are two ways that a Requester can be entered into the system:

- The MaintenanceDirect Administrator can add the Requester into the system.
- The Requester can add themselves into the system.

If you are a new Requester (you haven't been entered into the system before), follow these steps to set up your Requester name and enter yourself into the system:

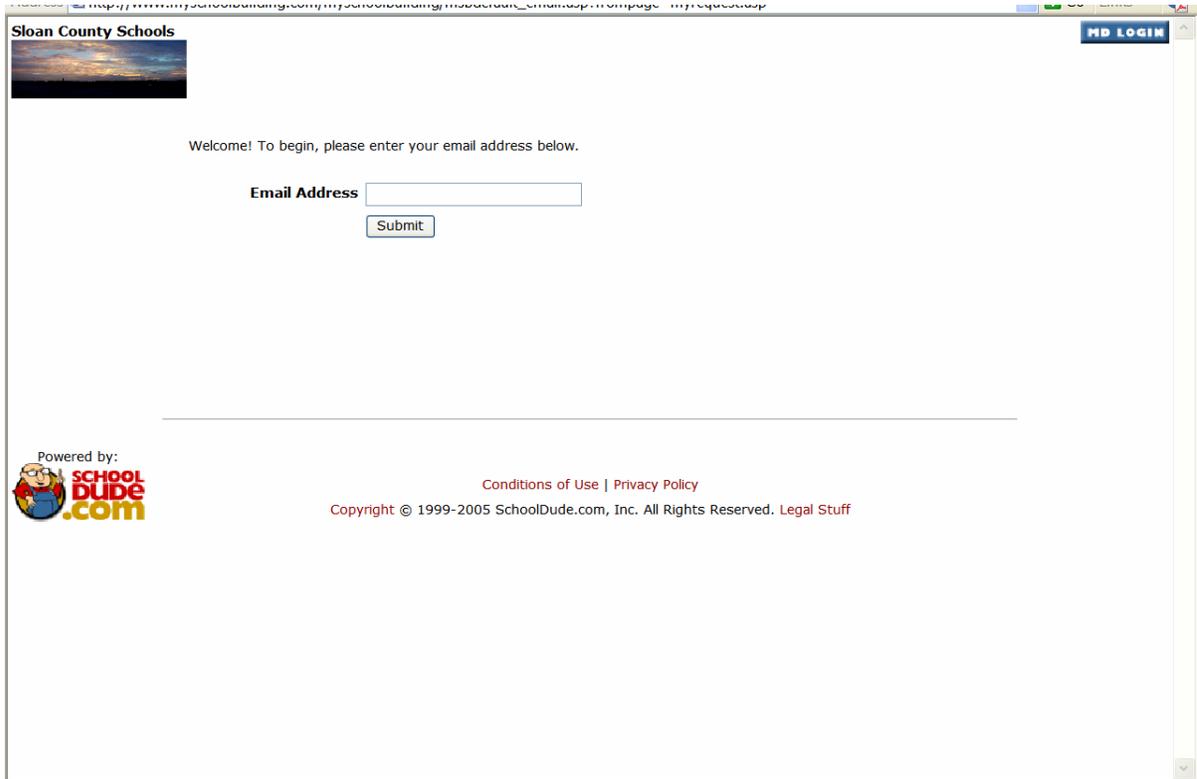
1. Go to www.myschoolbuilding.com.
2. You will see the following page:



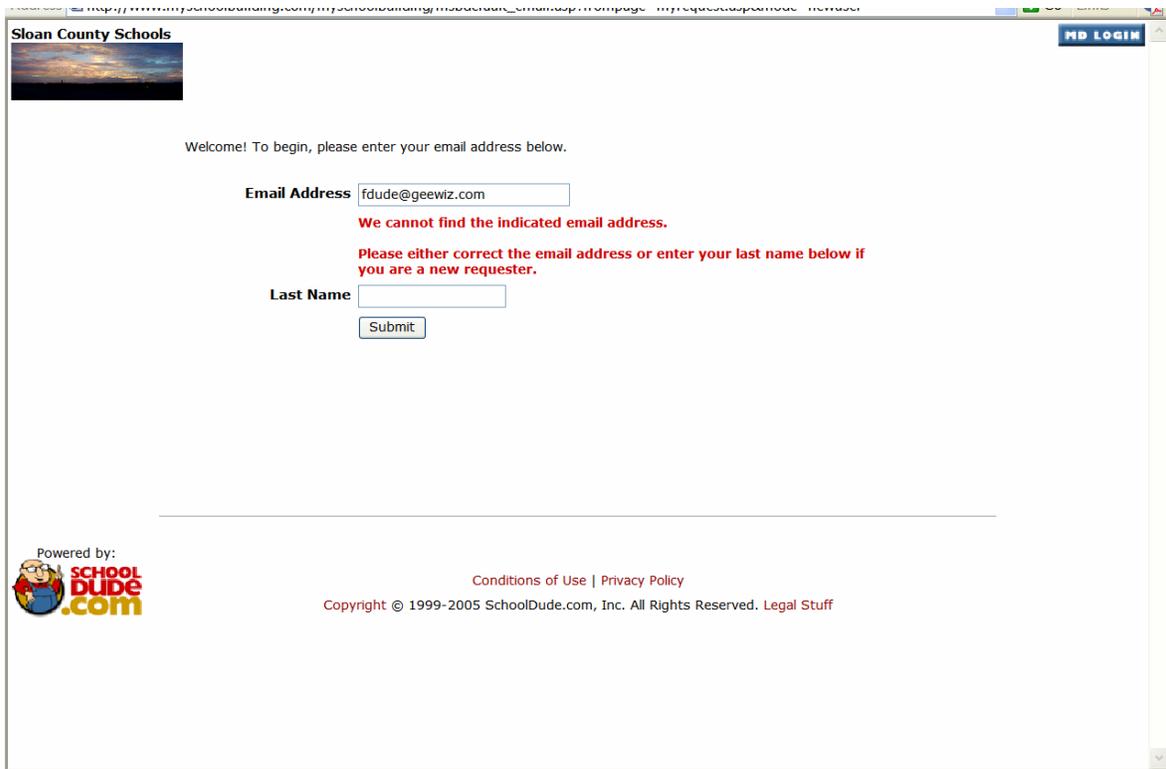
The screenshot shows a web browser window with the URL <http://www.myschoolbuilding.com/mySchoolBuilding/myOrganization.asp>. The page content includes the heading "Select Organization" and a form with the label "Organization Account Number" and an empty text input field. Below the input field is a button labeled "Submit Organization".

3. Enter your **organization account number** in the space provided (your Administrator can give it to you).
4. Click **Submit Organization**.

5. Next, you will be taken to the MySchoolBuilding.com login page for your educational facility. You will see your facility's name and/or logo in the top left-hand corner and the words "MD Login" in the top right. See below:



6. Enter your **email address** in the space provided.
7. Click **Submit**.
8. As you are a new Requester, you will then see the following page:



SCHOOLDUDE SAYS: If this page doesn't come up when you enter your email address and you see an entirely different page with the word "Welcome" at the top, followed by a form with some of your info already in it, skip ahead to step 17.

9. Enter your **last name** into the box provided.
10. Click **Submit**.
11. Next, you should see the page below:

Sloan County Schools

Welcome! To begin, please enter your email address below.

Email Address

Please select your name from the below list or select the "not listed" option.

<input type="radio"/> Ed Dude	edude@geewiz.com
<input type="radio"/> Jane Dude	jdude@geewiz.com
<input type="radio"/> Sam Dude	sdude@geewiz.com
<input type="radio"/> Will Dude	wdude@geewiz.com
<input checked="" type="radio"/> My name is not listed	

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12. Your email address should already be entered into the box provided. If it's not correct, however, enter it correctly. Make sure that the circle next to "My name is not listed" has been clicked and contains a green dot.
13. Click **Submit**.

14. The page you see next should look something like this:

Sloan County Schools

Indicates required information.

First Name

Last Name

Email Address

Phone Number

Pager

Cellular Phone

Note: This information will be saved after you submit your first request. New users are not saved until their first request has been submitted.

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15. Your last name and email address should already be filled in. Fill in the remaining fields (first name is the only one required) if you wish.

16. Click **Submit**.

II. You Are Here: The Work Order Request Page.

Once you've visited www.myschoolbuilding.com and logged in using your email address, you will be taken directly to the work order request page. This serves as your Home page for MySchoolBuilding.com and should look something like this:

Welcome
To submit your request complete the following form.

Indicates required information.

Step 1 Please be yourself, click here if you are not Fred Dude

First Name Fred **Last Name** Dude **Email** fdude@geewiz.com
Phone 919-555-4678 **Pager** **Cellular Phone**

Step 2 Location

-- Select Location --
Area -- Select Area -- **Area/Room Number**
 Yes, remember my area entries for my next new request entry.

Step 3 Select Problem Type:

Maintenance Help Desk:
Click [here](#) for Maintenance Emergency Contacts
Click on the problem type below that best describes your issue.

Athletic Fields Audio/Visual Cafeteria Carpentry
 Climate Control Custodial Electrical Food Services
 Heating/Ventilation /Air Conditioning Lighting Office Supplies Plumbing
 Windows

Maintenance Emergency
 Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
No contacts listed.	

Step 4 Please describe your problem or request.

Step 5 Requested Completion Date

(A valid date is required. Text is not accepted, but you may leave it blank. Click [here](#) for assistance in date entry.)

Step 6 Submittal Password

•••••• [Forgot Password?](#)

Step 7

Across the top of the page, you'll notice five tabs labeled "Maint Request", "Trip Request" (if you have TripDirect), "My Requests", "Settings", and "Help". These tabs are how you navigate to the information that you need. In the following sections, we'll show you around MySchoolBuilding.com and each tab will be explained. You'll see what they contain and how to use them. (We'll get into the actual work order request a little further along.)

III. The Settings Page: Your Information in a Nutshell.

Before we get started in a bit with making work order requests, let's take a moment to check out the **Settings** page, which contains your information as entered by the Administrator during the Account Setup process. If you set up your own account, this page will show the information you entered earlier. Use this page to edit your information.

The **Settings** page looks like this:

The screenshot shows the 'My Settings' page for a user named Fred Dude. The page includes a header for 'Sloan County Schools' with navigation links for 'Maint Request', 'Trip Request', 'My Requests', 'Settings', and 'Help'. The main content area is titled 'My Settings' and contains the following information:

- Indicates required information.** (checked)
- First Name:** Fred
- Last Name:** Dude
- Email Address:** fdude@geewiz.com
- Phone Number:** 919-555-4678
- Pager:** (empty)
- Cellular Phone:** (empty)
- Use these generic email notification settings.** (selected)
- Send Requester Work Request Receipt Notification? [Sample](#)
- Notify Requester of Work Request Assignment? [Sample](#)
- Notify Requester of Work Request Change in Status? e.g. On-hold, Void, Duplicate Request, Waiting Parts, etc. [Sample](#)
- Notify Requester of Work Request Completion? [Sample](#)
- Fred Dude prefers these email notification settings.** (selected)
- Send Requester Work Request Receipt Notification? [Sample](#)
- Notify Requester of Work Request Assignment? [Sample](#)
- Notify Requester of Work Request Change in Status? e.g. On-hold, Void, Duplicate Request, Waiting Parts, etc. [Sample](#)
- Notify Requester of Work Request Completion? [Sample](#)
- Password:** (empty)
- Submit** button

At the bottom of the page, there is a 'Powered by: SCHOOL DUDE' logo and a navigation bar with links for 'Maint Request', 'Trip Request', 'My Requests', 'My Settings', and 'Help'. There are also links for 'Conditions of Use', 'Privacy Policy', and 'Help'.

- Make any changes you wish to make, enter your password at the bottom, and click **Submit**.

OR

- To continue without making any changes, simply click the **Back** button at the top of your page or click the Tab of the page you wish to go to next.

If you have made changes, the page will refresh to bring up the same screen only now, the words “My Setting Saved” will appear in red at the top of the page (see below). Proceed by clicking the Tab of the page you’d like to go to next, up near the top of the screen.

Back - - - Search Favorites - - - Go Links

Address <http://www.myschoolbuilding.com/myschoolbuilding/MySettingWork.asp>

Sloan County Schools

MB LOGIN LOGOUT HELP

Maint Request Trip Request My Requests Settings Help

HELP

My Settings

Please be yourself, click [here](#) if you are not Fred Dude

My Settings Saved.

Indicates required information.

First Name Fred
Last Name Dude

Email Address fdude@geewiz.com

Phone Number 919-555-4678
Pager

Cellular Phone 919-555-6222

Use these generic email notification settings.

- Send Requester Work Request Receipt Notification? [Sample](#)
- Notify Requester of Work Request Assignment? [Sample](#)
- Notify Requester of Work Request Change in Status? e.g. On-hold, Void, Duplicate Request, Waiting Parts, etc. [Sample](#)
- Notify Requester of Work Request Completion? [Sample](#)

Fred Dude prefers these email notification settings.

- Send Requester Work Request Receipt Notification? [Sample](#)

IV. Maintenance Request: MD in Action

Now that you've logged in and checked out your settings page to make sure that all of your information is correct, we'll move on to what you're really here for: making work order requests.

First, let's look at **Work Order Statuses**:

1. **New Request:** All work orders initially are set to new request. Generally, "new request" means they have not been assigned to someone for the work to be completed.
2. **Work in Progress:** Any work order assigned or scheduled to be completed would be considered as work in progress.
3. **Complete:** A complete status signifies that all the actual work has been done. All purchases and labor transactions may not be entered into the system. This will alert requesters that the work has been done.
4. **Closed Work Order:** Once all transactions and notes are added to a work order, you would close it. Once a work order is closed, you cannot add any more transactions (you would have to change the status back to "complete" to add more transactions).
5. **Declined:** The declined status defines any work orders that will not be done. They may be declined by a principal (if site administrator approval routing is set up) or by a person in the maintenance department.
6. **Parts on Order:** This defines any work order waiting for parts before continuing.
7. **Duplicate Request:** Any work order entered twice or previously requested.
8. **Void:** Voided work orders are work orders you would like to remove and will not show up in any reports unless specifically requested. You **CAN'T** delete a work order. Instead, you would void them out of the system.
9. **On Hold:** Work placed on hold for any reason besides waiting on parts would have this status.
10. **Waiting for Information:** If you were waiting for more information from the requester or another person, you would want to set this as the status.
11. **Open Extended:** Any work order kept open for an extended amount of time. This can be used to keep track of labor hours for a general task done daily.
12. **Pending:** All PreventiveMaintenance work orders (if your educational facility owns PMDirect) will initially have a status of "pending".

➤ *Now that we've got Statuses out of the way, let's move on to the actual work order request, shall we?*

Requesting Work:

The **Maint Request** page (reached by clicking the tab near the top of the page from wherever you are in MySchoolBuilding.com) displays the form you'll fill out each time you want to request that work be done. Those fields marked with a red check-mark in a box () are required and can't be skipped. The rest, you should just fill in as you are able to make the work request as detailed and helpful to those processing it as possible (this can speed the process up a bit).

Here again is a view of the work order request page:

Sloan County Schools

MD LOGIN LOGOUT HELP

Maint Request Trip Request My Requests Settings Help

HELP

Welcome

To submit your request complete the following form.

Indicates required information.

Step 1 Please be yourself, click here if you are not Fred Dude

First Name Fred **Last Name** Dude **Email** fdude@geewiz.com

Phone 919-555-4678 **Pager** **Cellular Phone** 919-555-6222

Step 2 Location

-- Select Location --

Area -- Select Area -- **Area/Room Number**

Yes, remember my area entries for my next new request entry.

Step 3 Select Problem Type:

Maintenance Help Desk:
Click here for Maintenance Emergency Contacts
Click on the problem type below that best describes your issue.

Athletic Fields Audio/Visual Cafeteria Carpentry
Climate Control Custodial Electrical Food Services
Heating/Ventilation /Air Conditioning Lighting Office Supplies Plumbing

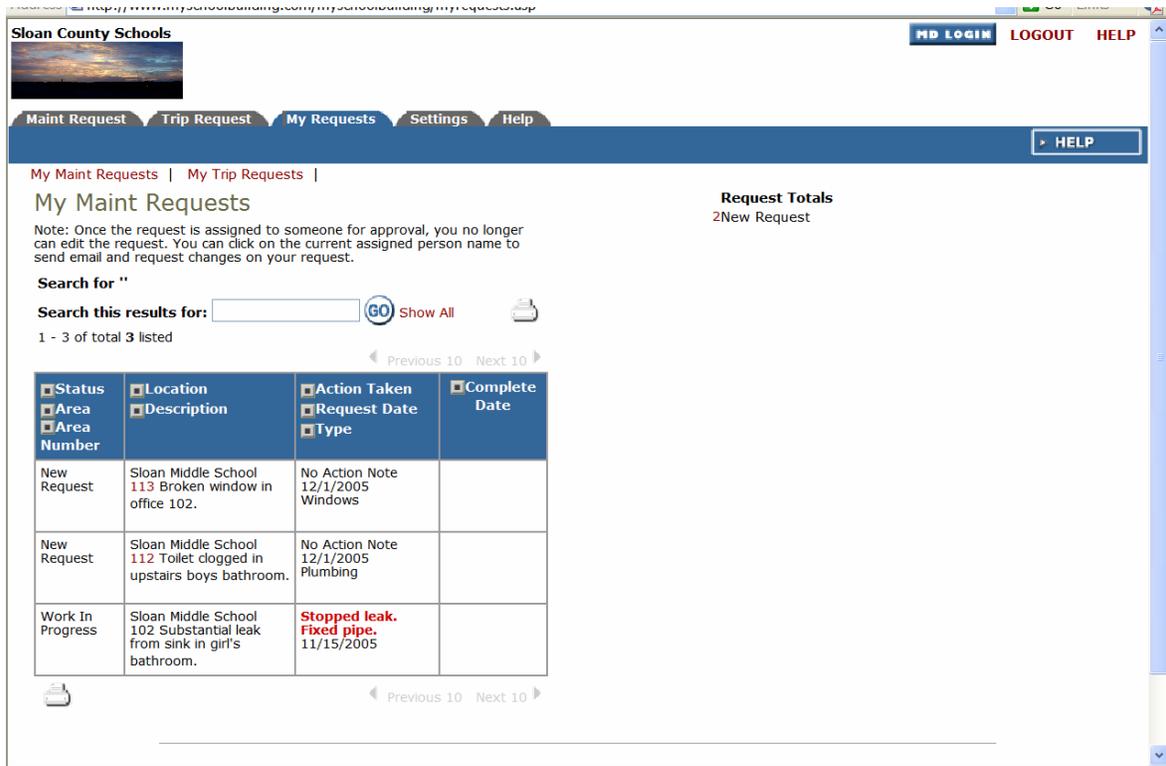
Follow these steps to fill out the form (It'll only take a minute or two!):

- Enter your **Location**, Building, Area, and Area Number.
- Select the **Problem Type** that best describes your issue. For example, if a toilet is leaking, that would be a plumbing issue. Once you click on a problem type, the page will refresh and your problem type will be highlighted with a red circle. If this is an emergency, check the Maintenance Emergency box below the problem types list.
- **Describe** your problem or request.

- Enter the **Requested Completion Date**. Click the calendar icon next to the date field to choose a date from the calendar.
 - Enter your **submittal password**. This password will be the same for all Requesters.
 - Click **Submit**.
- You will then be taken to the **My Maint Requests** page, which will show listed among other requests, the new work request you just made. We will cover this page in more detail in the next section.

V. My Requests: Keeping Track of Your Requests.

The My Requests page allows gives you a look at all the work requests you've made in MaintenanceDirect. You can reach the My Requests page by clicking on the tab at the top of the Home page. It should look something like this, depending on how many requests you've submitted:



The screenshot shows the 'My Requests' page for Sloan County Schools. The page has a navigation bar with tabs for 'Maint Request', 'Trip Request', 'My Requests', 'Settings', and 'Help'. Below the navigation bar, there are links for 'My Maint Requests' and 'My Trip Requests'. A 'Request Totals' section shows '2 New Request'. A search field is present with a 'GO' button and a 'Show All' link. Below the search field, there is a table of requests with the following data:

Status	Location	Action Taken	Complete Date
Area	Description	Request Date	
Area Number		Type	
New Request	Sloan Middle School 113	No Action Note 12/1/2005	
	Broken window in office 102.	Windows	
New Request	Sloan Middle School 112	No Action Note 12/1/2005	
	Toilet clogged in upstairs boys bathroom.	Plumbing	
Work In Progress	Sloan Middle School 102	Stopped leak. Fixed pipe. 11/15/2005	
	Substantial leak from sink in girl's bathroom.		

- Each request you make will be added to this list, where you can check its current status, who it's been routed to, the date you submitted it, and any Action notes that have been made.
- You can print your requests using the Print icon near the bottom left-hand corner of the page:

- To search your requests, enter a key term in the Search field, located just above your request list, then click **Go**. To show all requests (after searching for work orders), click the **Show All** link.
- To view only requests of a certain status, click the number next to the status under the "Request Totals" section (near the top, right-hand corner).

Data Clerk I

I. Welcome to the Home Page! Now What? (A quick overview of what's on the Home page.)

As the Data Clerk I of MaintenanceDirect for your educational facility, you not only have the ability to create new work orders and enter data into the system, you can also assign new requests, edit and close work orders, and view certain reports.

Once you've logged in with your user name and password, you're taken directly to your Home page. It should look something like this, depending on the number of work orders in the system:

The screenshot displays the MaintenanceDirect Home Page for Sloan County Schools. The interface includes a navigation bar with tabs for Home, Calendar, New Work Order, Assign New Request, Reports, and My Settings. A search bar is located at the top left, and a 'SHORTCUTS' button is on the right. The main content area is divided into several sections:

- LOGIN HERE:** Greeting for Tammy Dude, with a note to be oneself.
- Keyboard Tips:** A list of shortcuts for various actions like portal home, search, printing, and work order management.
- WORK ORDERS BY STATUS:** A section with a 'Last 10 Work Requests' dropdown and a 'Request Totals' list. A pie chart shows the distribution: 9 New Request (green), 2 Work In Progress (purple), and 3 Complete (orange). A 'Refresh Pie' button is present.
- LAST 10 NEW WORK REQUESTS:** A list of requests, currently showing one for Sloan Middle School (Toilet clogged in upstairs boys bathroom). It includes options to print, email a supervisor, or make a note, and an 'Action Taken' section with 'Assign' and 'Save' buttons.
- OVERDUE WORK:** A section indicating 9 days of overdue work (1 due on 11/22/2005).

Across the top of the page, you will see that there are six tabs reading: “Home”, “Calendar”, “New Work Order”, “Assign New Request”, “Reports”, and “My Settings”. Each of these tabs represents an aspect of MaintenanceDirect that you will work with and will be discussed in detail further on but for now, let’s take a look at the Home page. It contains the following sections:

1. **LOGIN HERE**: If you are logged in, you should see your name here. If you do not see your name, click the word “[yourself](#)” to log in correctly.
2. **Keyboard Tips**: This section provides you with lots of keyboard shortcut tips that will definitely come in handy when you have a lot of info to input.
3. **WORK ORDERS BY STATUS**: The graph that will appear in this section as soon as the first work order is submitted will show the number of work orders by status for the entire educational facility or district.
4. **LAST 10 NEW WORK REQUESTS**: This section shows the last ten work order requests that have been entered into the system. You can use this section to assign new work orders, note any action taken in the field provided, or mark as “In Progress” or “Complete”.
5. **WORK CENTER**: The work center provides links to the current monthly calendar and daily view of all new submittals. The number of unassigned emergencies will also be displayed in this section.
6. **Information Analysis**: Clicking on any of the links in this section will allow you to access lists and view reports and graphs on the selected information type.
7. **OVERDUE WORK**: This section, of course, displays all overdue work.
8. **Help** links are available in the bottom right-hand corner of your Home page, as well as at the very bottom of the page, just above your contact information. Clicking on the **Help** link in the top right-hand corner will take you to the MaintenanceDirect manual at any time. If you need to communicate directly with SchoolDude Support, however, go to the two links in the bottom right-hand corner of your Home page. To connect directly with someone from SchoolDude support via Instant Messenger, click on the word “[here](#)” (underlined and highlighted in red). See below:

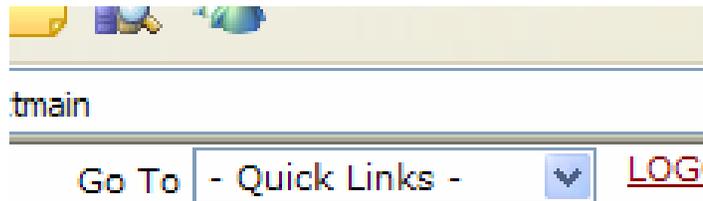
Click [here](#) to talk to
an Online Operator
NOW!



To write and send an email directly to SchoolDude Support, simply click on the **Email icon** directly below the link we just mentioned. The email link looks like this:



9. The **Quick Links** provide you with a way to navigate quickly between SchoolDude products. In other words, if you would like to move from MaintenanceDirect to another product used by your school for whatever reason, all you have to do is click on the Quick Links drop-down box, choose the SchoolDude product you'd like to visit, and you'll be taken to that product's Home page automatically. Quick links is located at the top of the Home page, near the right-hand corner, and looks like this:



II. My Settings: Your Information in a Nutshell.

Before we get started with the nuts and bolts of the work order process, let's take a minute to check out the **My Settings** page, which contains your information as entered by the Administrator during the account setup process. Use this page to edit your information or to change your password.

Your My Settings page should look something like this:

Sloan County Schools

Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar New Work Order Assign New Request Reports My Settings

Go to WOID: (ALT+S) GO Advanced Search | Help SHORTCUTS

Legend: Indicates required information.
 Account Administrator

Work Order Participant Information

Login Name TDude

First Name Tammy

Last Name Dude

Email tdude@geewiz.com
 Receive email notifications.

Reports To Schooldude Administrator
(Note: Reports to fields helps supervisors and administrators process and manage work assignments.)

Personnel Type Not Assigned

Phone Number 919-555-6497

Fax

Pager

Pager Email Notify electronically by Pager?
(Note: Pager notifications for work requester is not supported. Unit must support text-based electronic notifications. You can test [here](#).)

Notify Pager Email only for Emergency Work Orders.

- Make any changes you wish to make and click **Done**. If you don't want to change your password at this time, you don't have to. Your changes will be made anyway.
- When you click **Done**, you will be taken back to your **Home** page.



SCHOOLDUDE SAYS: If you don't see the change immediately, for instance, if you changed the spelling of your name and the spelling hasn't changed under the **Login Here** section when the page refreshes, don't worry. Next time you log in, you'll see that the change has been made.

III. Creating a New Work Order: MD in Action.

Now that you're signed in and you've checked and updated your settings, we'll take a look at entering work orders. One of the main differences in the Data Clerk role is the shorter work order form. It's presented this way to allow quick editing and comes equipped with keyboard shortcuts to make data entry easier. In this section of the manual, we'll take you through the work order process, step by step, so that you can not only see how it all works, but also learn how to enter work orders of your own. In the next section of this manual (**Assign New Request**), you'll see the full work order form as everyone else in the system sees it so that you will learn how to edit work orders when necessary.

Below, you will see a shot of what the New Work Order page looks like, once you've clicked on **the New Work Order tab** at the top of your MaintenanceDirect page:

Transaction Shortcuts

<input type="checkbox"/> WO List (ALT+T)	<input checked="" type="checkbox"/> New Work Order (ALT+O)	<input checked="" type="checkbox"/> Work Order Short Form (ALT+W)	<input checked="" type="checkbox"/> Work Order Long Form (ALT+F)	<input checked="" type="checkbox"/> Parts & Supplies (ALT+P)
<input checked="" type="checkbox"/> Labor Hours (ALT+L)	<input type="checkbox"/> Print Detailed WO Report (ALT+N)	<input type="checkbox"/> Print WO Form (ALT+R)	<input type="checkbox"/> Print Transactions (ALT+A)	
<input type="checkbox"/> Transaction List (ALT+J)				

Legend: Indicates required information.

Work Order: NEW (Short Form)

Indicates required information.

Date Received (ALT+V)	12/1/2005	Date Completed (ALT+D)	
<input checked="" type="checkbox"/> Priority (ALT+Y)	Medium	<input type="checkbox"/> Emergency (ALT+M)	
<input checked="" type="checkbox"/> Location Info (ALT+Z)	-- Select Location --	Contact Information	
	Building -- Select Building --		
	Area -- Select Area --	Area Number	
<input checked="" type="checkbox"/> Description (ALT+I)			
Assigned To (ALT+G)	-- Select Assignee --		
Action Taken (ALT+K)			
<input checked="" type="checkbox"/> Change Status (ALT+C)	-- Select Status --	Status Last Changed by	
Budget Info (ALT+B)	Purpose -- Select Purpose --	Project -- Select Project --	
	Budget -- Select Budget Account --	Custom Category -- Select Custom Category --	
	Craft -- Select Craft --	Equipment -- Select Equipment --	
	Classification <-- Select Classification -->		
	Type <-- Select Type -->		
(ALT+E)	<input type="button" value="Save"/>		



SCHOOLDUDE SAYS: Keep in mind that in MaintenanceDirect, work order ID numbers (WOID's) ALWAYS start with 100.

To fill out your work order, follow these steps below. Remember that fields marked with a red check mark in a box (☑) are required.

- **Date Received:** The request date of the work order will display.
- **Date Completed** (< alt > + < D >): Enter the date the work order was completed.
- **Priority** (< alt > + < Y >): Select the priority of the work order from the drop-down box provided. The available options are “Low”, “Medium”, “High”, “Emergency”, “Safety”, and “Scheduled”.
- **Emergency** (< alt > + < M >): If this work order is an emergency, indicate by checking this box.
- **Location Info.** (< alt > + < Z >): Location, Area, and Area Number are the fields included in this section. Select the location and area from the drop-down box. Add area number in the text box.
- **Description** (< alt > + < I >): Enter or edit the work order description.
- **Assigned To** (< alt > + < G >): Select the user assigned to the work order from the drop-down box.
- **Action Taken** (< alt > + < D >): Enter the action taken on the work order. The requester will see this information.
- **Change Status** (< alt > + < C >): Choose the status of the work order. See the next page for a list of all the different statuses a work order can hold and what they each mean.
- **Budget Info** (< alt > + < B >): Choose Purpose, Project, Budget, Custom Category, Craft, and Equipment from the drop-down boxes provided.
- Click **Save** (< alt > + < E >).
 - When the page refreshes, it will still show the work order form you just filled out, only now the words “Work Order saved successfully!” will appear in red near the top left-hand side of the screen, just above the form and, at the bottom of the page, there will be a “Transactions” list and a “Journal Notes section .

- To add a purchase transaction to the work order, click the Purchases shortcut (< alt > + < P >) on the shortcut menu at the top of the page. To add a labor transaction, click the Labor Hours shortcut (< alt > + < L >).
- To edit existing transactions, click on the Edit button next to the corresponding transaction in the transaction list.
- To **Delete** a transaction, click the check-box next to the transaction and click the **Delete** button.
- To add a journal note to the work order, click the “New Note” link in the Action Taken section

Work Order Statuses:

1. **New Request:** All work orders initially are set to new request. Generally, “new request” means they have not been assigned to someone for the work to be completed.
2. **Work in Progress:** Any work order assigned or scheduled to be completed would be considered as work in progress.
3. **Complete:** A complete status signifies that all the actual work has been done. All purchases and labor transactions may not be entered into the system. This will alert requesters that the work has been done.
4. **Closed Work Order:** Once all transactions and notes are added to a work order, you would close it. Once a work order is closed, you cannot add any more transactions (you would have to change the status back to “complete” to add more transactions).
5. **Declined:** The declined status defines any work orders that will not be done. They may be declined by a principal (if site administrator approval routing is set up) or by a person in the maintenance department.
6. **Parts on Order:** This defines any work order waiting for parts before continuing.
7. **Duplicate Request:** Any work order entered twice or previously requested.
8. **Void:** Voided work orders are work orders you would like to remove and will not show up in any reports unless specifically requested. You **CAN'T** delete a work order. Instead, you would void them out of the system.
9. **On Hold:** Work placed on hold for any reason besides waiting on parts would have this status.
10. **Waiting for Information:** If you were waiting for more information from the requester or another person, you would want to set this as the status.
11. **Open Extended:** Any work order kept open for an extended amount of time. This can be used to keep track of labor hours for a general task done daily.
12. **Pending:** All PreventiveMaintenance work orders (if your educational facility owns PMDirect) will initially have a status of “pending”.

IV. Assigning New Requests: Any Volunteers?

In this section, we'll go through the long work order form, as it's seen by other users in MaintenanceDirect, so you'll be familiar with them and learn how to edit them when necessary. To get started let's go back to the Home page.

As you've learned, when someone makes a work order request, the initial status of the request is "New Request". New Requests have two subcategories: "Unassigned" and "In Approval Process" (the numbers next to these on the Home page don't necessarily have to add up to the number next to "New Requests"). Unassigned work orders, which can be viewed in the **WORK ORDERS BY STATUS** section of your Home page (see screen shot below), are just what you think—those with no assignment at all. However, they can also be those that are assigned to you to be reassigned.

Any work order that is "In Approval Process" has been routed to another user for approval so you don't have to worry about it at this point.



SCHOOLDUDE SAYS: Clicking on the number next to "New Requests" will NOT take you to the **Work Order Summary List** (which shows all work orders in handy-dandy list format). Instead, it will take you to the work order form of the **OLDEST** of the New Requests that have been entered. In order to reach each of the New Requests at this point, you will have to click on the **Unprocessed New Requests drop-down box** provided and select the New Request you wish to view from the list that will drop down.



SCHOOLDUDE SAYS: A New Request's status determines whether or not you can or should deal with it at this point. In other words, if it's "In Approval Process", it has currently been routed to another user for approval and therefore, isn't yours to deal with yet. If it's "Unprocessed", however, you can go ahead and process it, assigning it to whoever needs to handle it at the time. For this reason, we recommend avoiding clicking on the number next to "New Requests". Instead, go straight to "Unprocessed" to handle those work orders that need direction.

To process your new (unprocessed) requests and assign those that are unassigned, do the following from the Home page:

- Click on the **number** next to “UNASSIGNED” on the Home page (see red arrow above).
- This will take you directly to the work order form of the oldest unprocessed work order in the system. At this point, you can either go ahead and handle this particular work order now, or you can choose another of the unprocessed work orders to process from the **Unprocessed New Requests dropdown box**, provided near the very top of the work order form (see green arrow below).

Sloan County Schools

Go to - Quick Links - LOGOUT MY ACCOUNT (32631335) HELP

Home Calendar New Work Order Assign New Request Reports My Settings

Go to WOID: (ALT+S) GO SHORTCUTS

Shortcuts

- Talk About It! *
- Suppliers
- Print WO Batch
- Print New Requests (*CommunityDirect)

Sort by Request Age Ascending Descending

Check here if you want to use Batch Print feature.

Unprocessed New Requests

Light board in auditorium is malfunctioning.

Light board in auditorium is malfunctioning.

WOID: 104 Requested By: On: 11/21/2005

Location: South Sloam High School

Building: -- No Building Available --

Priority: Low Emergency notification?

Craft: -- Select Craft --

Custom Category: -- Select Custom Category --

Current Route To

Assign/Route To: --Select Assigned/Route To-- View Assignments

Stop Routing? (Assignee will do this work.)

Status ID: New Request

Area: -- Select Area --

Area Number:

Budget: Show Budget?



SCHOOLDUDE SAYS: At this point, you can process the new request in one of two ways:

1. You can click on the **WOID** number, shown in red and indicated by the red arrow above, which will take you to the LONG word order form. This way, you can make changes to the full form and add any transactions or notes you wish to add.
2. You can process the work order as you see it on the screen above. Since you already know how to get to the long work order form (and we'll walk you through how to add purchase and labor transactions to a work order in the next section of this manual), it's this version of processing a new request that we'll cover now below.

(Continuing from the previous page...)

- On the work order form, you can view the details of the work order and make any changes you wish to make. You can also scroll down to the "Assign/Route To" field and choose a name from the drop-down box provided. Include any notes you wish to make. The fields on the full work order form are as follows:
- Location and Building: Where the work is needed, where it was requested.

- Priority: The level of urgency of the work needing to be done. You can leave it as the requester has it or you can change it.
- Emergency Notification: If this work order constitutes “Emergency” status, indicate so here by clicking in the check-box provided.
- Craft: This field indicates the nature of the work to be done. For example, if a toilet is leaking, the craft would be “Plumbing”.
- Current Route To: Shows who the work order is currently routed to. If routed to no one, this field will be blank.
- Assign/Route to: From the drop-down box provided, choose who this work order needs to go to next in its completion process. To view assignments already in the system for a particular user in order to see if they are available for this work order, click the [View Assignments](#) link provided here.
- Stop Routing? : If you check the box in this section, then the routing process will stop and the person you just assigned/routed to in the previous field will complete the work. If you’re routing it to another party first for approval, for example, then you would un-check this box.
- Status ID: Choose the status of this work order from the drop-down box provided.
- Area, Area Number, Budget, Purpose, and Project: Enter this information if available and applicable. It is not required, however.
- Estimated Start Date: The estimated date that work will begin on this work order.
- Estimated Completion Date: The estimated date that work will be completed.
- Action Taken: Enter any action taken for this work order in the field provided.
- Approval Routing
- Notes: Enter any notes you wish to include here.
- Click [Submit](#) or [Submit & Print](#) when finished. To reset the work order form, deleting any changes you just made, click [Reset](#).

➤ When you click Submit, you will be taken to the next work order request in the system. Continue with this process until you’re finished!

V. Entering Labor and Purchase Transactions: How Much Was That Again?

The cost of a work order comes, of course, from the labor and purchase transactions attached to it. To track those costs without having to chase down receipts, simply enter them into MaintenanceDirect as you get them and our system will organize them for you so that you'll always know exactly how much a work order costs and why. You've got all the answers.

In MaintenanceDirect, transactions can be entered in 2 ways:

Method 1. Enter multiple transactions for multiple work orders all at one time by using the links provided on the Transaction List page (see below):

Calendar New Work Order Assign New Request Reports My Settings

GO Advanced Search | Help

Transaction Shortcuts

[About It!](#) * [Suppliers](#) * [Labor Types](#) [Labor Hours \(ALT+L\)](#) [Purchases \(ALT+P\)](#)

[Transaction List](#) [Graph Transactions](#) [Print Transactions](#)

Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire ship but MaintenanceDirect data is kept private to each account.

Click to sort table by that column.

Transactions starting by WOID:
3 4 5 6 7 8 9 All

Transaction List

total 2 listed

Transaction	Transaction Description Supplier	Date Type	Qty	Rate	Cost
Acme Plunger	Lowe's	11/21/2005 Materials	1	\$57.00	\$57.00
Flourescent tubes.		11/28/2005 Materials	4	\$1.87	\$7.48

First Prev 10 Next 10 Last

Print This!

*Calculations shown on this page represent costs through yesterday. For up-to-date calculations use "Print Transactions" options.

- Starting on the Home page, click the **Transactions** link in the Information Analysis section:

New Request Reports My Settings

SHORTCUTS

Work In Process

New Request
 Work In Progress
 Complete

or each selected period. This status change.

WORK CENTER

CALENDAR

12/5/2005 NEW SUBMITTALS (Monday)

UNASSIGNED EMERGENCIES 0

Information Analysis

[Crafts](#)
[Employee Status Count](#)
[Equipment Transactions](#)
[Outstanding Work](#)
[Work Load/Assignment](#)
[Work Order](#)

OVERDUE WORK

- 13 days
(1 due on 11/22/2005)

- 3 days
(1 due on 12/2/2005)

- You will then be taken to the Transaction List page. The [Add New Purchases](#) and [Add New Labor Hours](#) links are red and are located on the right-hand side. See below:

Home Calendar New Work Order Assign New Request Reports My Settings

to WOID: GO

Advanced Search | Help

Transaction Shortcuts

Talk About It! *	Suppliers *	Labor Types	Labor Hours (ALT+L)	Purchases (ALT+P)
Transaction List	Graph Transactions	Print Transactions		

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend: Click to sort table by that column.

Filtering

View transactions starting by WOID:
 0 1 2 3 4 5 6 7 8 9 All

Transaction List

1 - 2 of total 2 listed

[Add New Purchases](#)
[Add New Inventory Issues](#)
[Add New Labor Hours](#)

WOID <input type="checkbox"/>	Transaction Description <input type="checkbox"/>	Date <input type="checkbox"/>	Qty <input type="checkbox"/>	Rate <input type="checkbox"/>	Cost <input type="checkbox"/>
Status <input type="checkbox"/>	Supplier <input type="checkbox"/>	Type <input type="checkbox"/>			
Description <input type="checkbox"/>					
103 Complete Kid in toilet	Acme Plunger Lowe's	11/21/2005 Materials	1	\$57.00	\$57.00
106 New Request Two lights out in stairwell.	Florescent tubes.	11/28/2005 Materials	4	\$1.87	\$7.48

First Prev 10 Next 10 Last

Print This!

*Calculations shown on this page represent costs through yesterday. For up-to-date calculations use "Print Transactions" options.

- To enter purchase transactions, click the **Add New Purchases** link. You will be taken to the following page:

Transaction Shortcuts

WO List (ALT+T)	New Work Order (ALT+O)	Work Order Short Form (ALT+W)	Work Order Long Form (ALT+F)	Parts & Supplies (ALT+P)
Labor Hours (ALT+L)	Print Detailed WO Report (ALT+N)	Print WO Form (ALT+R)	Print Transactions (ALT+A)	
Transaction List (ALT+J)				

Purchases

Parts & Supplies Indicates required field.

Note: Actual completion date will default to today's date when it is marked as complete.

% Markup % Discount (ALT+7) on all parts and supplies
 (Note: If no discount or markup, please leave blank. When used, the original cost is automatically adjusted and saved.)

WOID Supplier (ALT+1) or New Supplier (ALT+9) Note: Type a new supplier in the "New Supplier" box.
 Date Type Item Description Budget (ALT+B)

Invoice/PO #	Work Order Complete?	Qty	Unit Cost	Tax	Shipping	Other	Total Cost
Purchased By (ALT+3)	Actual Completion Date	Action Taken	(ALT+Q)	(ALT+U)	(ALT+Z)	(ALT+S)	(ALT+6)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- On this page, you can enter multiple purchase transactions for multiple work orders. Just make sure you enter the required fields for each purchase transaction (WOID, Date, Type, and Item Description). It's the fast, easy way to get all your purchase transactions in at once so you can get on to what's next.

- To enter multiple Labor transactions, click on the **Add New Labor Hours** link on the Transaction List page. The page you are taken to next will look like this:

The screenshot displays the Maintenance Direct web application interface. At the top, there is a navigation bar with links for Home, Calendar, New Work Order, Assign New Request, Reports, and My Settings. Below this is a search bar for WOID (Work Order ID) with a 'GO' button and a 'SHORTCUTS' button. A 'Transaction Shortcuts' table is visible, containing links for WO List, New Work Order, Work Order Short Form, Work Order Long Form, Parts & Supplies, Labor Hours, Print Detailed WO Report, Print WO Form, Print Transactions, and Transaction List.

The main section is titled 'Labor Hours' and contains a form for entering labor transactions. The form includes a 'Labor' section with a checkbox for 'Indicates required field.' and a note: 'Note: Actual completion date will default to today's date when it is marked as complete.' The form has several columns: 'WOID', 'Employee', 'Type', 'Work Order Complete?', 'Date', 'Actual Completion Date', 'Hours', and 'Total Cost Action Taken'. Each row represents a labor transaction, with fields for entering data. A 'save' button is located at the bottom of the form.

Below the form is a section titled 'Last 10 Transactions' with a table header containing columns: Delete, Edit, WOID Date, Description, Type, Labor, Hourly Rate, and Total Cost.

- This page allows you to enter multiple labor hours transactions with the required fields of WOID, Employee, Date, and Actual Completion Date. Fill in other information as it is available.

Method 2. Enter purchase and labor transactions for one work order at a time by using the **New Purchase Transaction** and **New Labor Transaction** links on the long work order form itself. See below:

Clicking on the **New Purchase Transaction** link on the work order form will take you to the following page where you can enter and save all of the purchase transaction information for the current work order. See below:

Legend: Indicates required information.

Purchases [Back to WOID 104](#)

Work Order: **104**

Search WOID

Description	Light board in auditorium is malfunctioning.
Location	South Sloan High School
Status	New Request
Assigned To	

Trns Date

Type

Select Supplier or type new one below.

Supplier

Invoice/PO #

Budget Code

Purchased by

Description

Quantity

Cost Each **% Markup** **% Discount**
(Note: If no discount or markup, please leave blank. When used, the original cost is automatically adjusted and saved.)

Sales Tax
Shipping/Freight
Other Charges
Amount

Complete Work Order

[New Purchase Transaction](#)
[New Labor Transaction](#)

No Transactions for this Work Order yet.

[Click here to talk to an Online Operator NOW!](#)

Home [Calendar](#) [New Work Order](#) [Assign New Request](#) [Reports](#) [My Settings](#)

Powered by: 

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Clicking on the **New Labor Transaction** link on the work order form will take you to the following page, where you can enter and save labor transaction information for this particular work order. See below:



Home [Calendar](#) [New Work Order](#) [Assign New Request](#) [Reports](#) [My Settings](#)

Go to WOID: [SHORTCUTS](#)

Advanced Search | Help

Work Order Labor Entry for Tammy Dude

Employee -- Select Employee -- [Back to WO 104](#)

Date: (Note: OT represents "Other Time". click OT to enter time for holidays, comp, and/or overtime.)

December 2005							Work Order ID/Location	Work Close?	Tue Nov 29	Wed Nov 30	Thu Dec 1	Fri Dec 2	Sat Dec 3	Sun Dec 4	Mon Dec 5	Total Hours	
S	M	T	W	T	F	S	104 South Sloan High School	<input type="checkbox"/>	0	OT	0	OT	0	OT	0	OT	0
28	29	30	31	1	2	3											
4	5	6	7	8	9	10	<input type="text"/>	Actual Comp. Date	12/2/2005	<input type="button" value="Enter Materials"/>	<input type="button" value="Enter Note"/>						
11	12	13	14	15	16	17											
18	19	20	21	22	23	24											
25	26	27	28	29	30	31											
							Total Hours	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
							Grand Total Hours	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Back to WO 104](#)

[Click here to talk to an Online Operator NOW!](#)

Home [Calendar](#) [New Work Order](#) [Assign New Request](#) [Reports](#) [My Settings](#)

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- If you need to account for overtime, comp time, holiday time, or any other time, you can click on OT (“Other Time”) next to the corresponding date. A window will appear for you to enter in any other times.

VI. Searching for Work Orders: The Information You Want When You Want It.

So you've learned how to create work orders, how to process and assign new work orders, and how to add purchase and labor transactions to existing work orders. The next step is to learn how to search for work orders that have been entered into the system. That way, you can find exactly what you need, when you need it.

To get started, let's take a look at the different types of searches that you can perform within MaintenanceDirect and then check them out, one by one:

1. Go to WOID...
2. Advanced Search
3. Work Order by Status list
4. Last 10 Work Requests list

1. **Go To WOID:** This is the simplest search that you can perform. You can search for work orders using the search text box, located in the blue bar near the top, left-hand side of every page. See below:

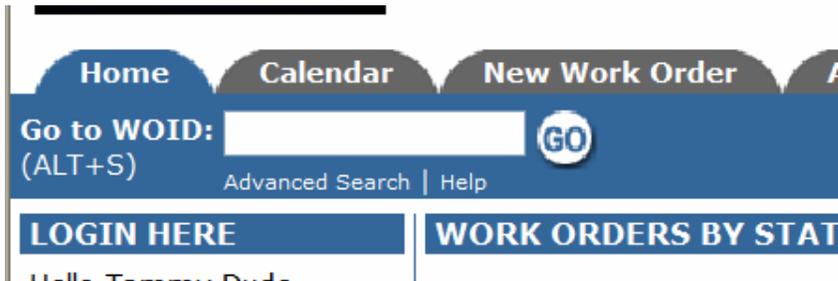


The screenshot shows the top navigation bar of the MaintenanceDirect system. A red arrow points to the search bar labeled "Go to WOID: (ALT+S)". The search bar includes a "GO" button and links for "Advanced Search" and "Help". Below the search bar, there are two main sections: "LOGIN HERE" with a message "Hello Tammy Dude Not Tammy Dude! Please be yourself." and "WORK ORDERS BY STATUS" with a "Last 10 Work Requests" section and a "Period" dropdown menu set to "All".

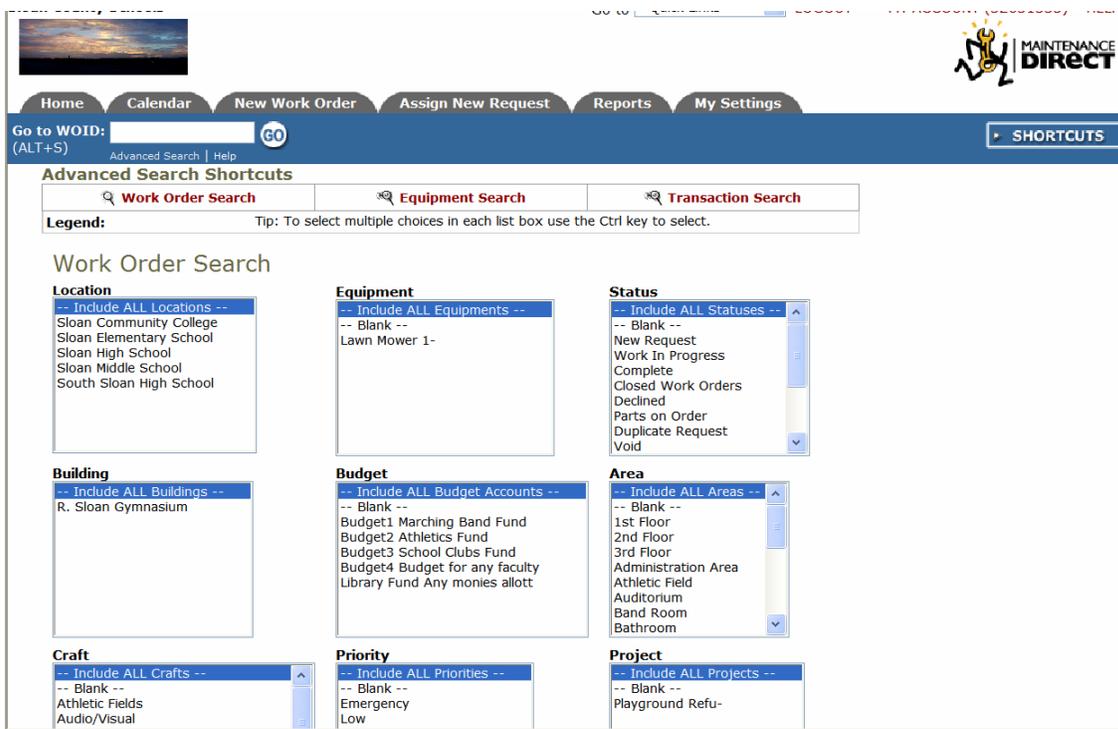
In this box, you can enter a work order number or a key word and click **Go** to search for the work order or information that you need.

For example, if you wanted to find work order #180, you would simply type "180" into the search box and click **Go**. That would then pull up the short work order form for that particular work order. If there is more than one work order which references work order #180, you would then see a listing of all matching work orders.

2. **Advanced Search:** Underneath the search field discussed above, you will see a link that says “Advanced Search”:



Clicking on this link will take you to the Work Order Search page, which will look something like this:



On this page, you may choose any combination of search options from the listings and fields provided. Enter your options and click the **Search Now** button.

An example would be if you would like to search for all work orders with the status of “Work In Progress” for “Sloan High School” requested in September of 2003. In this case, you would choose “Sloan High School” from the Location list and “Work In Progress” from the Status list. In the request date fields, you would type “9/1/2003” to “9/30/2003” and then click **Search Now**. A list of all work orders that meet those particular criteria would appear. If there was only one work order to meet those criteria, the work order update page for that work order would appear instead of the list.

- To print out the results list, click on the **Print This** icon at the bottom of the results page. To print out a single work order, click on the printer icon () next to the corresponding work order.
- To view a specific work order, click on the work order ID or the description.
- If you would like to send an email to the requester, click on the **requester name** to send an email via your email system (your browser and email must be configured to use “mail to” links).

3. **Work Order by Status List:** You can view all work orders in a particular status by clicking on the **number** next to the particular status you wish to view. You can edit the time period that is displayed in the section by selecting a new period from the drop-down box. The screen will then automatically refresh. See the **Work Orders By Status** list below:

The screenshot displays the Maintenance Direct web application interface. At the top, there is a navigation menu with buttons for Home, Calendar, New Work Order, Assign New Request, Reports, and My Settings. Below this is a search bar labeled 'Go to WOID: (ALT+S)' with a 'GO' button and a 'SHORTCUTS' button. The main content area is divided into three vertical sections:

- LOGIN HERE:** Greeting for Tammy Dude, a note to be yourself, and keyboard tips for Internet Explorer 4+.
- Keyboard Tips:** A list of keyboard shortcuts for various actions like printing, navigating, and viewing work orders.
- WORK ORDERS BY STATUS:** This section includes a 'Last 10 Work Requests' dropdown menu set to 'All'. Below it is a 'Request Totals' list with checkboxes:
 - 9 New Request
 - 6 UNASSIGNED
 - 2 In Approval Process
 - 3 Work In Progress
 - 3 Complete
 - 0 Closed Work Orders
 - 0 Declined
 - 0 Void
 - 0 On Hold
 - 0 Pending
 A pie chart titled 'Work In Progress' shows the distribution of these counts. A 'Refresh Pie' button is located below the list. A note states: 'Counts are based on Status Date for each selected period. This reflects the actual date of the last status change.'

On the right side, the **WORK CENTER** section includes a 'CALENDAR' for 12/5/2005 (Monday) showing 'NEW SUBMITTALS' and 'UNASSIGNED EMERGENCIES'. Below this is an 'Information Analysis' section with links for 'Crafts', 'Employee Status Count', 'Equipment Transactions', 'Outstanding Work', 'Work Load/Assignment', and 'Work Order'. At the bottom right, an 'OVERDUE WORK' section shows:

- 13 days (1 due on 11/22/2005)
- 3 days (1 due on 12/2/2005)
- (2 Total Overdue)

Once you choose a period and click a number next to a particular status, a list of all work orders for that status in the specified time period will display in the Work Order Summary list. You can sort this list by any of the fields listed by clicking on the field name to sort by descending order or clicking again to sort by ascending order. The default sort is by “request date”.

The screenshot shows the MAINTENANCE DIRECT web application interface. At the top, there are navigation tabs: Home, Calendar, New Work Order, Assign New Request, Reports, and My Settings. Below these is a search bar for WOID (Work Order ID) with a 'GO' button and a 'SHORTCUTS' button. A legend explains that clicking a column header sorts the table, and a second click reverses the sort. A filtering section allows users to view work orders starting by location, with a dropdown menu showing letters A through Z and 'ALL'. The main section is titled 'Outstanding Work Orders' and shows 1 - 3 of total 3 listed. A table with the following columns: WOID, Priority, Craft, Deferred Until, Deferred By, Reason, Status, Requester, Assigned To, Location, Building, Area, Requested, Target Area, Completed, Status Chg, Action Taken, Labor Hours, and Total. Three work orders are listed:

WOID	Priority	Craft	Deferred Until	Deferred By	Reason	Status	Requester	Assigned To	Location	Building	Area	Requested	Target Area	Completed	Status Chg	Action Taken	Labor Hours	Total	
112		Plumbing				Work In Progress	Fred Dude Ben Dude		Sloan Middle School			12/1/2005 12/2/2005		12/2/2005 10:24:15 AM				\$0.00	
108		Carpentry				Work In Progress	Jill Dude Ben Dude		Sloan Elementary School	1st Floor		11/30/2005		11/30/2005 1:37:22 PM				\$0.00	
102						Work In Progress			Sloan Middle School			11/15/2005 11/22/2005		11/22/2005 10:56:45 AM				\$0.00	

Below the table, there is an '+ Add New' button and navigation controls for the list.



SCHOOLDUDE SAYS: Keep in mind that clicking on any of the three numbers beside the three categories of “New Requests” (“New Request”, “Unassigned”, or “In Approval Process”) won’t take you to the Outstanding Work Orders list, but will take you instead to the work order form of the oldest work order in the system for that particular status. You can then scroll to each work order in that status by using the Unprocessed New Requests drop-down box provided.

- To view all the details of the work orders, click on the work order ID number (**WOID**).
- To send an email to the requester of the work order, click on that **requester’s name**.
- To view the details of the location of the work order, click on the **location**.

4. Last 10 Work Requests List: You can view the last ten work orders requested by clicking on the [Last 10 Work Requests](#) link, just below the words “Work Order By Status” on the Home page. See below:

This will take you to the **Outstanding Work Orders** page, where you will see the last ten requests listed.

- To view all the details of the work orders, click on the work order ID number (WOID).
- To send an email to the requester of the work order, click on that requester’s name.
- To view the details of the location of the work order, click on the location.

VII. Closing Work Orders: When It's Time to Move On.

Work orders can be designated as “Complete” or “Closed Work Order”. Generally, if the actual work for the work order is done, you would mark it as “complete” because you may still have labor hours or purchase transactions to add to the work order. Once you add all transactions, however, you would then “close” the work order. Once a work order is closed, you cannot add any other transactions; in order to add transactions, you would need to re-open the work order.



SCHOOLDUDE SAYS: Note that you can NOT delete a work order. This is mainly for record-keeping purposes.

To mark a work order as complete, simply change its status to “Complete”. To close a work order, go in and change the status to “Closed Work Order”. Save your changes by clicking the **Save** button. See below:

Work Order: 101

 << First < Prev Next > Last >>

Status

Complete ▾

Status Date
11/14/2005 1:18:07 PM

Status Last Changed By

Work Order: 101

 << First < Prev Next > Last >>

Status

Closed Work Orders ▾

Status Date
11/14/2005 1:18:07 PM

Status Last Changed By

VIII. Reports: Listing, Printing, and Graphing Your Work Orders.

SchoolDude provides you with the options of listing, graphing, and printing any and all of your work orders, along with their information, for your convenience and for your records. Follow the steps in this section and you'll have hard copies and visual aids for all of your work order information at your fingertips.

- The types of reports available in MaintenanceDirect are summarized in the following tables:

Crafts:

Report Types	Report Information
Summary	The craft summary report will give a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each craft. You can sort the report by location or craft.
Detail	The craft detail report will give you a detailed account of each transaction for work orders that are assigned the selected crafts.

Employee Status Count:

Report Types	Report Information
Summary Count	The employee summary count will give you a summary of each employee and how many work orders they are assigned in each work order status.
Estimate vs. Actual Analysis	This report will show all estimated and actual employee hours and costs on one report.
Detail Employee Counts	The detail employee count report will give you a listing of all the work orders that an employee has been assigned, as well as a total count. The report will show the work order number, requester, and the description for each work order.
Detail Employee Cost	The detail employee cost lists each employee and their total hours worked, average number of hours per work order, the total cost, the average cost per work order, and the number of work orders.
Employee Productivity	The employee productivity report will list each employee, the work orders assigned to them, and the number of days to complete those work orders. It will also give the total and an average number of days to complete.

Equipment:

Report Types	Report Information
Summary (All)	The equipment summary report will give you summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost for each piece of equipment.
Detail (All)	The equipment detail report will give you a detailed account of each transaction for work orders assigned the selected equipment.
Summary (Maintenance vs. Preventive Maintenance)	The equipment summary report (maintenance vs. preventive maintenance) will give you a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per piece of equipment. The maintenance and preventive maintenance will be separated for comparison.
Detail (Maintenance vs. Preventive Maintenance)	The equipment detail report (maintenance vs. preventive maintenance) will give you a detailed account of each transaction for work orders that are assigned the selected equipment. The maintenance and preventive maintenance will be separated for comparison.

Equipment Usage:

Report Types	Report Information
Summary (Equipment Costs)	The equipment summary report will give you summary of all usage purchases for each piece of equipment.
Detail (Equipment Costs)	The equipment detail report will give you a detailed account of each usage transaction for work orders assigned the selected equipment.
Summary (Work Order Costs)	The equipment summary report will give you a summary of all labor hours, labor and material costs, total costs, work order count, and average hours/cost per piece of equipment
Detail (Work Order Costs)	The equipment detail report will give you a detailed account of each transaction for work orders that are assigned the selected equipment.

Transactions:

Report Types	Report Information
Summary	The transaction summary report will give a total quantity and cost for a group of transactions. For example, you can print a report for a technician for the total number of hours they worked that month. You can also print a report showing all the purchases from a specific supplier. You can sort this report by transaction type or location.
Detail	The transaction detail report will give you the total quantity and cost of a group of transactions, like the summary report. It will also list all the transactions that make up the total cost. You can sort this report by transaction type or location.

Outstanding Work:

Report Types	Report Information
List	This list will display all open work orders that are in the status of “New Request”, “Work in Progress”, or “Pending”.

Work Orders:

Report Types	Report Information
List:	This list will display all work orders in your system.

Listing:

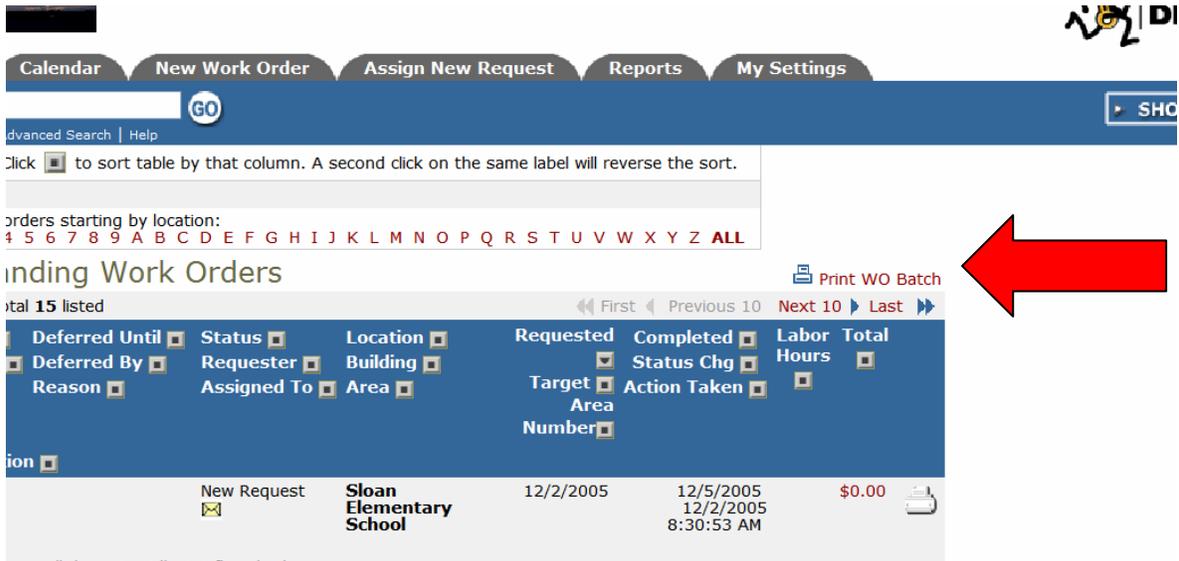
1. Go to the **Information Analysis** section of MaintenanceDirect, either on the **Home** page, or by clicking on the **Reports** tab from wherever you are in MD. The **Reports** page looks something like this:

The screenshot shows the MaintenanceDirect web application interface. At the top, there is a header for "Sloan County Schools" with a navigation menu containing "Home", "Calendar", "New Work Order", "Assign New Request", "Reports", and "My Settings". The "Reports" tab is currently selected. Below the navigation is a search bar with the text "Go to WOID: (ALT+S)" and a "GO" button. To the right of the search bar is a "SHORTCUTS" button. The main content area is divided into two columns. The left column is titled "Reports" and contains a sub-section "Benchmarking" with a book cover for "GLOBAL CASES IN BENCHMARKING" and a "Purchase Now!" link. The right column is titled "Information Analysis" and lists several report categories: Crafts, Employee Status Count, Equipment Usage, Transactions, Outstanding Work, Work Load/Assignment, and Work Order. At the bottom of the page, there is a section for "Printed Reports".

2. Click on the link for the information you wish to view. For example, **Crafts**.

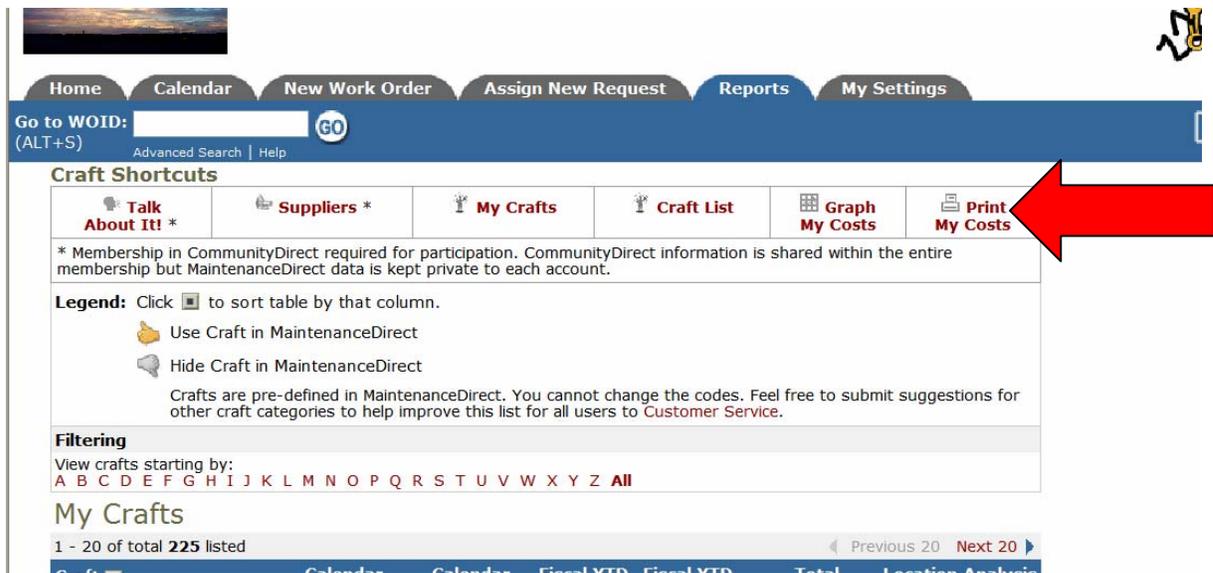
Printing:

3. After you find the information you want by clicking on its link under Information Analysis either on the Home page or using the Reports tab, look for the Print icon (🖨️) in the shortcuts menu or near the top left-hand corner of the list that comes up. See the examples below:



The screenshot shows a web application interface with a navigation bar containing "Calendar", "New Work Order", "Assign New Request", "Reports", and "My Settings". Below the navigation bar is a search bar with a "GO" button and a "SHC" dropdown. The main content area displays a list of pending work orders. The list has columns for "Deferred Until", "Status", "Location", "Requested", "Completed", "Labor", and "Total". A red arrow points to a print icon in the top right corner of the list area.

Deferred Until	Status	Location	Requested	Completed	Labor	Total
Deferred By	Requester	Building	Target	Status Chg	Hours	
Reason	Assigned To	Area	Area Number	Action Taken		
		Sloan Elementary School	12/2/2005	12/5/2005 12/2/2005 8:30:53 AM		\$0.00



The screenshot shows a web application interface with a navigation bar containing "Home", "Calendar", "New Work Order", "Assign New Request", "Reports", and "My Settings". Below the navigation bar is a search bar with a "GO" button and a "SHC" dropdown. The main content area displays a list of crafts. The list has columns for "Talk About It!", "Suppliers", "My Crafts", "Craft List", "Graph My Costs", and "Print My Costs". A red arrow points to a print icon in the top right corner of the list area.

Talk About It! *	Suppliers *	My Crafts	Craft List	Graph My Costs	Print My Costs
------------------	-------------	-----------	------------	----------------	----------------

- Follow the instructions on the appropriate page (the page below is shown as an example), filling out the necessary information and choosing the period you wish to print, etc.

- When you're finished, click the **Print This!** icon at the bottom of the page.

➤ You can also print any page that has a “**Print This!**” icon on it:



SCHOOLDUDE SAYS: The **Employee Status Counts** link under **Information Analysis** will take you directly to the **Print Status Counts by Employee** page without you having to click any other link. The **Outstanding Work** and **Work Order** links will take you directly to the **Outstanding Work Orders** page, which has no shortcuts. From here, you can either print one work order at a time by clicking on the **WOID** of the desired work order OR you can print them all in a batch by clicking the **Print WO Batch** link in the top, right-hand corner of the Outstanding Work Orders list. The **Work Load/Assignment** link takes you to the **Calendar**, where you can click on individual work orders or click the **Print Assignments** link just under the Shortcuts menu on the left-hand side.

Graphing:

4. If you wish to view a graph of certain information, follow steps 1 and 2 above, using the **Information Analysis** menu and choosing the category you wish to view. Then do the following:

- Once you've chosen the category you'd like to view from the Information Analysis menu (Crafts, Equipment, or Transactions all have the Graph option) click on the **Graph My Costs** or **Graph Transactions** link in the shortcuts menu at the top of the page. See below:

Home Calendar New Work Order Assign New Request Reports My Settings

Go to WOID: GO (ALT+S) Advanced Search | Help SHORTCUTS

Craft Shortcuts

[Talk About It!](#) [Suppliers](#) [My Crafts](#) [Craft List](#) [Graph My Costs](#)

* Membership in CommunityDirect required for participation. CommunityDirect information is shared within the entire membership but MaintenanceDirect data is kept private to each account.

Legend: Click to sort table by that column.

- Use Craft in MaintenanceDirect
- Hide Craft in MaintenanceDirect

Crafts are pre-defined in MaintenanceDirect. You cannot change the codes. Feel free to submit suggestions for other craft categories to help improve this list for all users to [Customer Service](#).

Filtering

View crafts starting by:
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

My Crafts

1 - 20 of total 225 listed Previous 20 Next 20

Craft	Calendar YTD Count*	Calendar YTD Costs*	Fiscal YTD Count*	Fiscal YTD Costs*	Total Count*	Location Analysis
Advertisements	0	\$0.00	0	\$0.00	0	Expenditures
Air Conditioning	0	\$0.00	0	\$0.00	0	Expenditures
Alarm	0	\$0.00	0	\$0.00	0	Expenditures
Appliance Repair	0	\$0.00	0	\$0.00	0	Expenditures
Architect	0	\$0.00	0	\$0.00	0	Expenditures
Asbestos	0	\$0.00	0	\$0.00	0	Expenditures
Asphalt	0	\$0.00	0	\$0.00	0	Expenditures

- You will be taken to the **Graph My Costs** or **Graph Transactions** page, depending on the link you selected. On this page, go through the fields provided, choosing the **Period**, **Transaction Type** or **Craft**, **Chart Title**, etc. to indicate what information you'd like the graph to depict.
- Click **Refresh Chart**.
- When the page refreshes, the chart or graph will be at the bottom of the page.

- Change the information shown on the graph by changing the options above the chart.

Fiscal Yr Qtr 1

Fiscal Yr Qtr 2

Fiscal Yr Qtr 3

Fiscal Yr Qtr 4

Calendar Year

Calendar Yr Qtr 1

Calendar Yr Qtr 2

Calendar Yr Qtr 3

Calendar Yr Qtr 4

Electrical

Food Services

Heating/Ventilation /Air Conditioning

Lighting

Office Supplies

Plumbing

Windows

Separate Craft Code?

Yes No

Select Your Location(s)
 (Note: To select multiple hold Ctrl key down. Maximum 10 locations can be selected.)

-- Include ALL Locations --

Sloan Community College

Sloan Elementary School

Sloan High School

Sloan Middle School

Select Your Building

-- Include ALL Buildings --

Select Your Status

-- Include ALL Statuses --

Refresh Chart

Craft Comparison

Maintenance Cost

57

■ All [Carpentry]

■ All [Custodial]

■ All [Electrical]

■ All [Plumbing]

IX. Using the Calendar: See the Big Picture.

As with all other SchoolDude products, MaintenanceDirect has a Calendar tab—a place you can go to see what’s going on, where, when, and who’s involved. You can see, in easy-to-read calendar format, work orders entered on a month-to-month or year-to-year basis. You can even check the weather! In this section of your manual, we’ll show you how to use the calendar and all of its options in the way that works best for you.

- To open up your calendar from wherever you are, click on the **Calendar tab** at the top of your screen.

The page that opens up will look something like this:

MAINTENANCE DIRECT

Home Calendar New Work Order Assign New Request Reports My Settings

Go to WOID: (ALT+S) GO

Advanced Search | Help

SHORTCUTS

Calendar Shortcuts

Month View Day View Organization Event Calendar Assignment Report Get Weather

Select Month/Year
December 2005

Print Assignments

Assigned To
-- Include ALL Assignees --
Show all outstanding work
Show completed/closed work

Work Calendar for December 2005
Tip: You can click on the day number to see more details on work assignments. The number in parenthesis are hour estimates. Only open work orders appear, closed, completed, void and duplicate are excluded.

View Legend

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 112 113	2 114	3
4	5	6	7	8 Get Weather	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

<- Previous Month Next Month ->

Legend

- MD Work Order (no icon)
- PM Work Order
- FSD Work Order
- IT Work Order
- PD Work Order

Tip: Click the day number to view work order details for the entire day or click a work order id to view/edit the work order..

Home Calendar New Work Order Assign New Request Reports My Settings

Click here to talk to an Online Operator NOW!

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LOGIN SERVICES MY ACCOUNT (32631335) HELP

Need help? Call us 1-877-868-DUDE (3833)

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Email

At the top of your screen, just above the words “Work Calendar for...”, are the **Calendar Shortcuts: Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather.** In this section, we’ll cover each of these shortcuts in turn, starting with the Month View.

1. **The Month View** page shows you what’s going on on a large, easy-to-read calendar, one month at a time. It’s the view that shows automatically when you open up the Calendar page—in other words, the page you’re looking at now.

The month you’re in currently will display with arrows in the bottom left and right-hand corners that you can click on to navigate to the **Previous Month** or **Next Month**. Just below the **Calendar Shortcuts**, you will see two drop-down boxes, one for the month and the other for the year, which serve as another kind of shortcut, allowing you to navigate the large calendar from one month to the next without clicking multiple times on the Previous Month and Next Month buttons.

- On the **Month View**, each day shows in the traditional squares of a calendar, which contain any open work orders. Open work orders are those work orders not in the “Complete”, “Closed”, “Void”, or “Duplicate” status.
- The work order numbers will be displayed on the calendar as red links. If you click on a work order number, it will take you to the work order update screen. If you see a number in parenthesis next to the WOID (Work Order ID number), it is the “Estimated Hours” for the work order. Any Preventive Maintenance work orders will have a yellow background behind the work order ID.
- There are different icons used throughout the MaintenanceDirect **Calendar** page to indicate what kind of work orders the work orders on the calendar are. The legend for these icons is at the bottom of the **Month View** page and looks like this:

29	30	31	
----	----	----	--

[<- Previous Month](#)
[Next Month - >](#)

Legend

- MD Work Order (no icon)
- PM Work Order
- FSD Work Order
- IT Work Order
- PD Work Order

Tip: Click the day number to view work order details for the entire day or click a work order id to view/edit the work order..

- If your educational facility or district has PreventiveMaintenanceDirect, PM work orders will show as having a yellow background on the calendar, behind the WOID.

2. The Day View page can be reached in two ways:

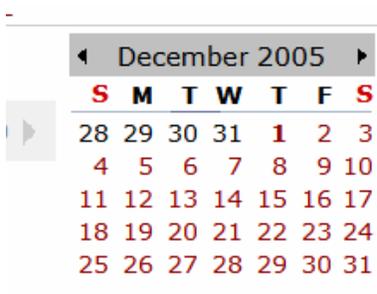
- Clicking on the **Day View shortcut** at the top of the page, or
- Clicking on the **number** of the date on the monthly calendar, if that day's number is shown in **red** (you can only reach the Day View this way if you have work orders assigned to you on that particular day).

The Day View automatically defaults to today's date. It shows you what's going on, one day at a time. If you have no work orders assigned for a particular day, the words "There are no assigned Work Orders for this day" will be shown. If you do have work orders, however, you will see your work orders for the day displayed on the left-hand side, along with the WOID number, the Work Order Request Description, the Location Name, and the Estimated Hours (if applicable). See below:

The screenshot shows the Sloan County Schools maintenance management system interface. At the top, there is a navigation bar with links for Home, Calendar, New Work Order, Assign New Request, Reports, and My Settings. Below this is a search bar for Work Order IDs (WOID) and a "GO" button. The main content area is titled "Calendar Shortcuts" and includes buttons for Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather. A filtering section allows users to view work orders by location (A-Z) and by date (December 2005). The "Work Orders for Thursday 12/1/2005" section displays two work orders:

WOID	Description	Location Name
112	Toilet clogged in upstairs boys bathroom.	Sloan Middle School
113	Broken window in office 102.	Sloan Middle School

- You can navigate from one day to the next using the small calendar on the right-hand side of the screen (see green arrow above). Simply click the **number** of the day you wish to view. To move from one month to another, use the left and right arrows next to the name of the month at the top of the small calendar (see next page).



- To print a form for a work order, click on the **Print This** button for the corresponding work order.

3. The **Organization Event Calendar** page is where you can view events, such as school breaks, for locations/organizations within your school or district. They will then be stored on a yearly calendar on the left-hand side of the screen and then listed in more detail on the right-hand side.

You can reach the Organization Event Calendar by clicking on the short cut at the top of the Calendar page.

The Organization Event Calendar page should look something like this, depending on how many events have been entered to this point:

The screenshot shows the Sloan County Schools Organization Event Calendar interface. At the top, there is a navigation bar with links for Home, Calendar, New Work Order, Assign New Request, Reports, and My Settings. Below this is a search bar for WOID (Work Order ID) and a 'GO' button. The main content area is titled 'Sloan County Schools Organization Event Calendar' and features a 'Calendar Shortcuts' section with buttons for Month View, Day View, Organization Event Calendar, Assignment Report, and Get Weather. A dropdown menu for 'Location' is set to '-- Select Location --'. The calendar displays a grid for the year 2006, with the month of January highlighted. To the right of the calendar grid is a list of events with columns for Begin Date, End Date, Event Title, and Date Created. The events listed are: Fall Break (10/10/2005 to 10/14/2005), Matt's Birthday (11/15/2005), Teacher Work Day (November) (11/28/2005 to 11/28/2005), Christmas Break (12/19/2005 to 1/6/2006), Test Event 2 (3/28/2006), and Spring Break (4/17/2006 to 4/21/2006).

4. The **Get Weather** shortcut, as with the weather icon on the main monthly calendar and the **Home** page, serves as a link to connect you with AccuWeather.com, where you can check current weather conditions in your area or the area where work orders are being done. You can also check the forecast with a range up to fifteen days.

- Simply click on the **Get Weather** shortcut near the top of the page and a separate browser page will pop up, displaying AccuWeather.com.



- Enter your Zip Code or City/State into the box shown above and click **Go**.

SchoolDude Vocabulary

(A Lesson in SchoolDude-ish for MaintenanceDirect Users)

So you've hit a certain word or phrase and you have no idea what you've just read? Welcome to SchoolDude Vocabulary, a glossary created especially for SchoolDude clients to make all that "SchoolDude lingo" a little less confusing. We've also included in this section a brief legend of the icons used throughout MaintenanceDirect.

Areas: Locations within your educational facility. MaintenanceDirect has a predefined list of over 300 area types. Some examples are "1st Floor", "Auditorium", and "Classroom".

Budget Codes: Designated funds coming from a specific budget that are applied to cover a particular work order's costs. If your organization doesn't use formalized budgets, you might still use arbitrary Budget Codes for tracking work expenses.

Buildings: If you have multiple free-standing structures on a campus, you might list these as Buildings for a particular location. Some examples are "Dude Hall", "Smith Performing Arts Center".

Classifications: A way of breaking down equipment by what it's used for. For instance, a classification could be "lawn equipment" or "HVAC".

Closed: The status a work order would hold once all transactions and notes were added into it. Once a work order is closed, no more transactions can be added.

Complete: The status a work order holds when all the actual work has been done. All purchases and labor transactions may not be entered into the system. This status primarily alerts requesters that the work has been done.

Comptroller: Serves as the "safety net" of work request routing. Any request the system doesn't know what to do with gets sent to the comptroller.

Crafts: A generic skill needed to fix a problem. MaintenanceDirect has over 180 crafts to choose from. They help you organize your work and assign it to the appropriate people. Some examples would be "Carpentry", "Electrical", and "Pest Control".

Declined: This is the status that is used to decline any work orders that will not be done. They may be declined by a principal or by a person in the maintenance department.

Deferred: This status is used to show that a work request has been approved but will be completed at a later date.

Duplicate Request: This defines any work order entered twice or previously requested.

Equipment: Any tools, machinery, etc. used to carry out work done, such as lawnmowers or generators.

Labor Types: Labor types are the multipliers you use to calculate labor costs. The most common Labor Types and cost multipliers are provided for you, but you can add your own as needed.

Locations: Locations are typically campuses in your district. If you are working with a single campus, locations may be used for different places on that campus

MySchoolBuilding.com: A web page that provides any role with easy access to the request page. The person making a work request may not have approval rights for the request they are making, so they enter it through MySchoolBuilding.com to put the request into routing. It also provides a user in one product with an easy way to request for a different product.

New Request: There are two subcategories of New Requests. Those are “Unassigned” and “In Approval Process”. “Unassigned” new requests are those that are ready to be processed. New Requests that are “In Approval Process” are those that have currently been routed to another user for approval and therefore, not ready to be dealt with yet.

On Hold: Work placed on hold for any reason besides waiting for parts would be placed under the “On Hold” status.

Open Extended: This status applies to any work order that is kept open for an extended amount of time. This can be used to keep track of labor hours for a general task done daily.

Parts on Order: Just what it says—any work order waiting for the arrival of parts before work continues.

Pending: All PM work orders will initially have a status of “Pending”.

Project Codes: Project Codes can group several work orders into a common project. You may have several work orders that deal with building a new playground set. Applying the same Project Code to each of the work orders allows you to run reports on how much that playground set cost to install.

Purpose Codes: Purpose Codes help classify work into why it’s being done. For example “vandalism” is a Purpose code provided for your account. Reports could be run to see how much was spent on vandalism in a given time period.

Quick Launch: a section of shortcuts on the Home page to reach various pages.

Shortcuts: Links that SchoolDude utilizes in all of its products so that users can navigate quickly from one page to another without clicking through a series of other links. These Shortcuts are usually located near the top of a page in a series of white boxes. Different shortcuts are available on differing pages and they also vary from role to role.

Users: Anyone employed by your district or educational facility, in various roles, that uses MaintenanceDirect. These could be administrators, custodians, teachers, etc.

User Roles: There are seven roles in MaintenanceDirect: Administrator, Supervisor I, Supervisor II, Technician, Site Administrator, Data Clerk I, and Requester.

Void: Voided work orders are work orders that you would like to remove and that will not show up in any reports unless specifically requested. You cannot delete a work order so instead, you may want to void them.

Symbol/Icon Legend:

: Indicates required information.

: Click on this calendar icon to be taken to an interactive calendar where you can select the date you wish to use.

: The thumbs-up and thumbs-down icons indicate that a service or service provider is active or inactive, respectively.

: Click on this email icon to open up a blank email form.

: Click on this icon to sort information by the category it indicates (the category that it appears beside).

: Clicking on this icon will invert listed options or information.

: This icon is used on the Organization Event Calendar page and indicates an event that is shared by more than one Location.



This is the SchoolDude. He's your friend.

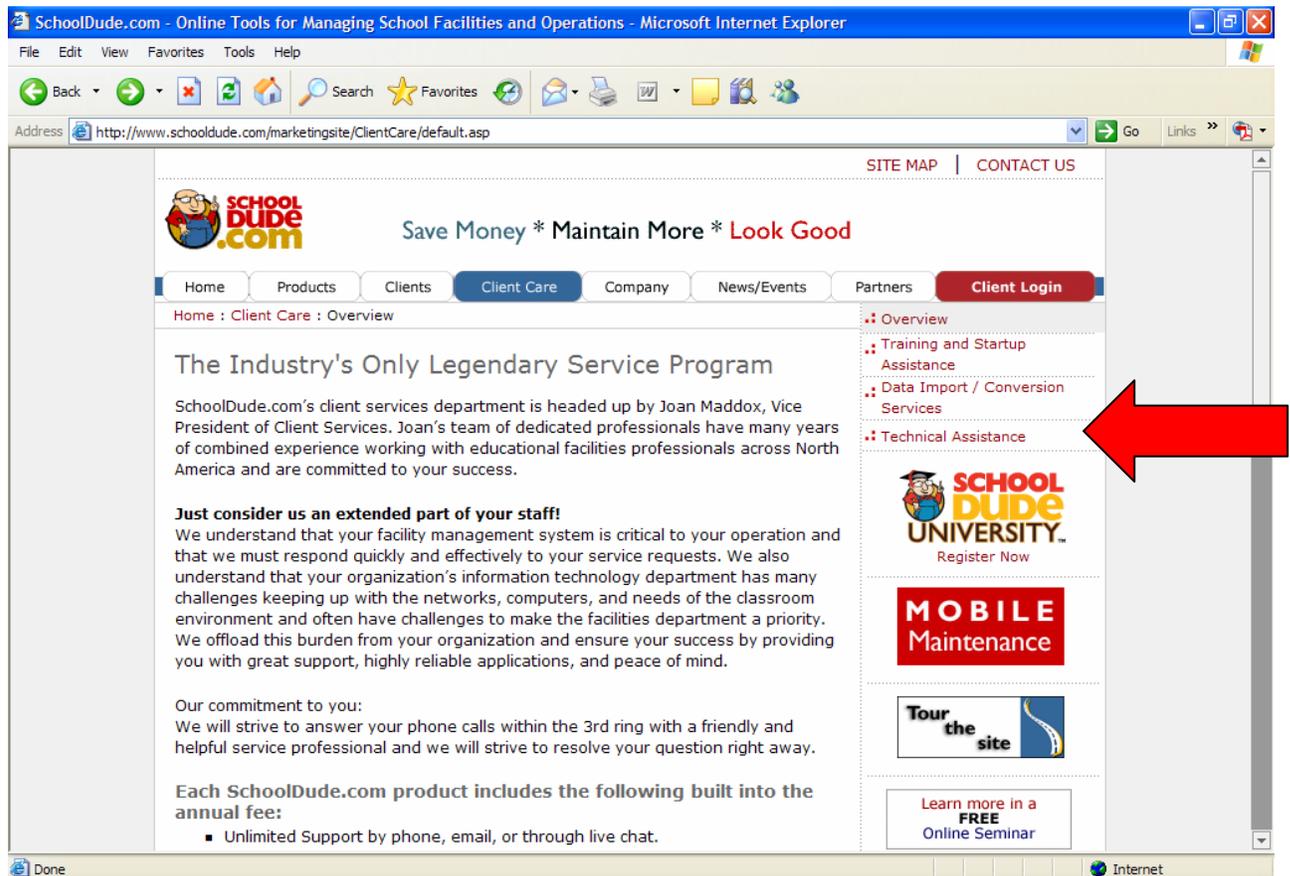
Help Reference

At SchoolDude, we understand that sometimes searching for answers to your questions can be frustrating. For that reason, we've included this page to give you a few quick sources to get you off the shoulder and back on the road.

1. Give us a call at 1-877-883-8337. We strive to answer your phone calls within the first three rings. Our friendly and helpful service professionals will be available to take your calls between the hours of 8 am and 6 pm (EST) Monday - Friday.
2. Drop us an email at the following address: support@schooldude.com. Someone will reply to your email or give you a call promptly, usually within an hour during regular business hours.
3. Chat live with a service professional by logging on to your account and clicking on the **Help** link in the lower right-hand corner of your Home page. It looks like this:

Click [here](#) to talk to
an Online Operator
NOW!

Or visit www.schooldude.com, click on **Client Care**, and choose **Technical Assistance** (shown in red) from the list on the right-hand side of the screen. See below:



The screenshot shows the SchoolDude.com website in Microsoft Internet Explorer. The browser address bar displays <http://www.schooldude.com/marketing/site/ClientCare/default.asp>. The website header includes the SchoolDude.com logo and the tagline "Save Money * Maintain More * Look Good". The navigation menu is set to "Client Care". The main content area features the heading "The Industry's Only Legendary Service Program" and a description of the client services department. A sidebar on the right contains a list of services: Overview, Training and Startup Assistance, Data Import / Conversion Services, and Technical Assistance. A red arrow points to the "Technical Assistance" link. Below the list are promotional banners for "SCHOOL DUDE UNIVERSITY", "MOBILE Maintenance", "Tour the site", and "Learn more in a FREE Online Seminar".