T4: VIEW & RECORD INFO ON A WORK ORDER - TRADESPERSON (EZMaxMobile)

PURPOSE:

Commonly used by a tradesperson to view work orders, record labor (or time) and work logs, and complete an assignment.

STEPS NEEDED:

1. **Log into EZMaxMobile**

Note: If you are not using the campus internet service (EduRoam), please make sure you are logged into and running the VPN using the CISCO AnyConnect Application. For more information, please review SOP E3: EZMaxMobile Install and Setup on an iOS Device.

   a. Tap the EZMaxMobile app on your mobile device to open it
   b. Log into EZMaxMobile using your NetID and Cornell password
   c. The first screen displayed is your *Start Center*

2. **Start Center overview**
   a. Tapping on the 1st line will show you a calendar view of your work and when it's scheduled to be completed
   b. Tapping on the 2nd line will show you all work orders assigned to you
   c. Tapping on the 3rd line will show you work orders assigned to you with materials received
   d. Tapping on the 4th line will show you work orders you have reported time against in the past 14 days
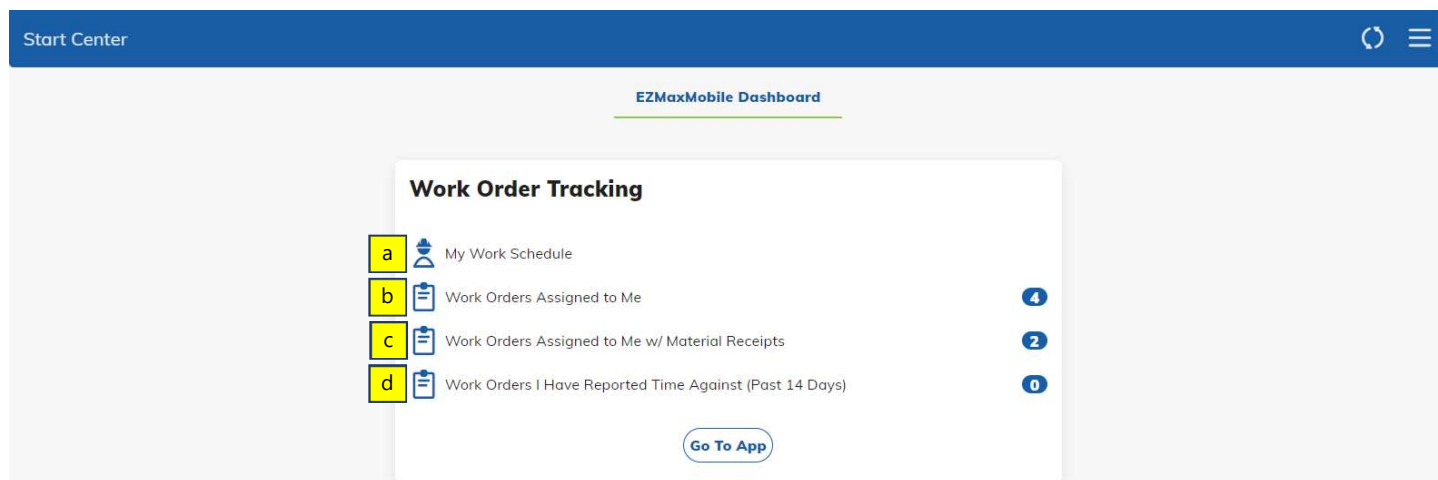
3. **Review the list of work orders that are assigned to you, and select a work order**
    a. On your *Start Center*, tap "Work Orders Assigned to Me"
    b. To sort your list:
        i. Use the **Select Value** drop down to sort by a particular field
        ii. Use the arrow on the right to sort the list ascending or descending
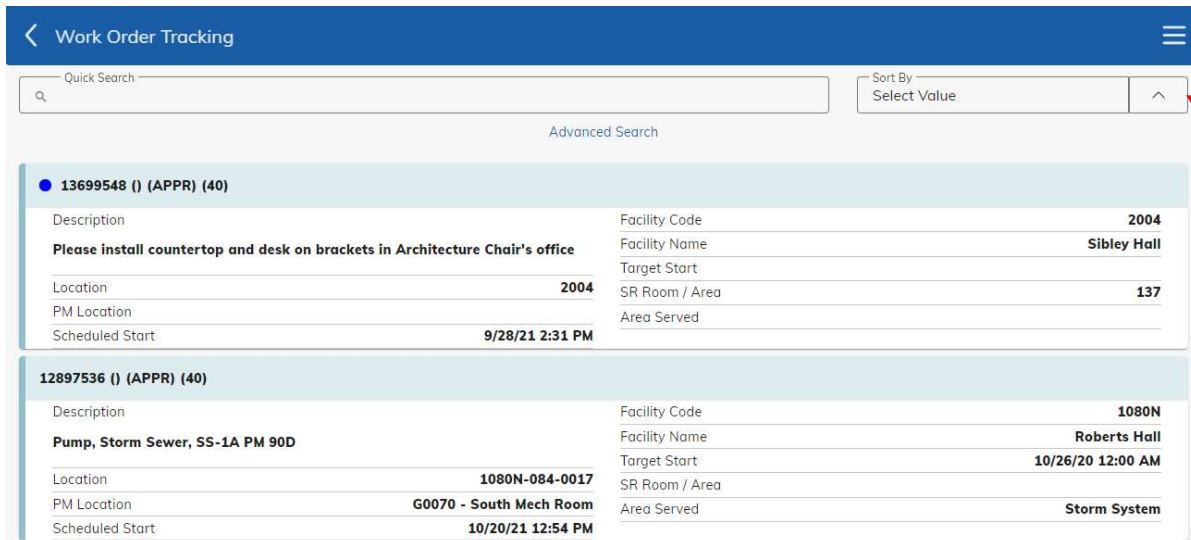
    iii. To narrow down your list:
        1. Tap the "Advanced Search" button and fill in or select information to populate various fields (for example: crew, facility code, asset, priority)
        2. Tap the "Search" button at the lower right of the screen
    iv. Identify the work order in the list that you would like to view
        1. To search for a particular work order #, use the **Quick Search** field (Quick Search *only* searches work order #s).
        2. To find a work order that you are not assigned to, see SOP T6.
   v. Tap on a work order to open it in *Work Order Tracking*

4. **View a work order in *Work Order Tracking***
    a. When viewing your list of work orders, tapping on one work order entry will open the *Work Order Tracking* tab where details about the work order will be displayed

5. Creating a labor entry with a work log (to create only a work log without a labor entry, go to task 6.)

    a. Tap the "Labor" button on the Work *Order Tracking* screen

        Note: All labor entries against a CM work order requires a work log indicating work performed. Work logs for PM work orders are only required when deviating from the job plan
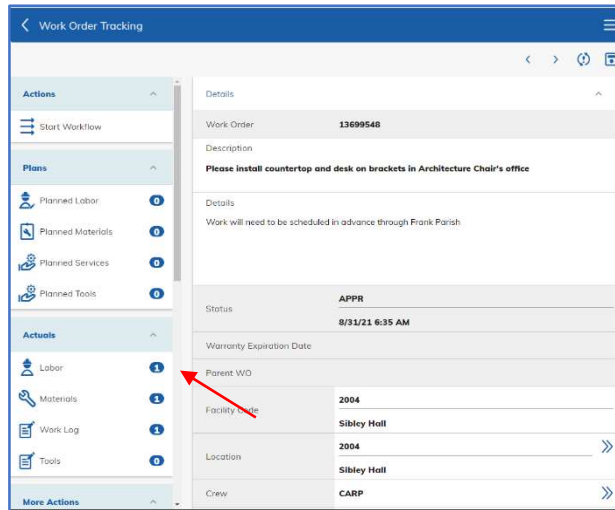
        i. The *Labor Transactions* screen will be displayed, which shows a list of labor transactions already entered on that work order, if any

       ii. If you want to view details about an existing labor entry, tap on that particular labor transaction

      iii. Tap the "Back" arrow to return to the previous screen

    b. Tap the ⊞ button on the top right of the *Labor Transactions* screen

       i. The following fields will automatically display: work order, your default craft and skills, and the start date (today's date)

c. If you are entering labor for a day that is NOT today, make sure you change the **Start Date** (tap the calendar icon to the right of the field)

d. To enter the # of **Regular Hours** you worked, use the use the +/ – buttons to the right of the field until the correct number of hours are showing

e. If actual work has not been started, and the labor being entered is for "planning" time (inspect the work location, order materials, etc.), change the **Type** to "PLAN" (tap the ⟫ icon to the right of the field and then tap on "PLAN" to select it.) This will keep the WO in "APPR" status and will not trigger the status change to "INPRG".

f. To enter the # of **Premium Hours** you worked:

       i. To the right of the **Premium Pay Code** field, tap the ⟫ icon and then tap a Premium Pay Code (CBK, DOT, OT, OTSD, SD).

      ii. In the field next to **Premium Pay Hours**, use the +/– buttons to the right of the field until the correct number of hours are showing *for the hours you actually worked*.

    iii. ***Note***: If both Regular and Premium Hours need to be entered, enter them as two separate transactions.

g. Tap in the "Work Log: Details**"** field at the bottom of the screen and type in work performed or any other pertinent information

Tip: If you are using an iOS device, another way to enter work log information is to use the microphone. If Siri is enabled, tap in the ***Work Log*** *field and then tap the microphone symbol, and speak into the iPad. Tap the microphone when you are finished speaking and it will type it for you. (You may need to edit some of the words by using the keyboard.)*

h. ***Note***: Review your entry and verify that it is correct

   i. It is important to verify the entry is correct because once it is saved, it cannot be edited. If it is found to be incorrect after it has been saved, negating and correcting entries must be created

  i. Tap the "Save" button on the top right of the screen

  j. Tap the "Back" arrow twice to return to the work order on the *Work Order Tracking* screen

6. **Create a work log without a labor entry**

> *Examples: asset and PM changes*

  a. From the *Work Order Tracking* screen, under actuals, tap the "Work Log" button

   i. The *Work Log* screen will be displayed, which shows a list of existing work logs, if any

   ii. If you want to view details about an existing work log entry, tap on that particular work log

   iii. Tap the "Back" arrow to return to the previous screen

  b. Tap the ⊞ button on the top right of the *Work Log* screen

   i. Your NetID and today's date will automatically display

  c. ***Note:*** If the work log is to provide an update related to asset information (removal of asset, consider PM frequency change, revise information), tap the blue arrows to the right of **CLIENTNOTE** and then tap "UPDATE". Otherwise, leave as is

  d. Tap in the **Details** field and use the keyboard to enter a work log

   i. If the work log is for a date other than today, type the date first before you type text

  e. ***Note:*** Review your work log entry and verify that it is correct

   i. It is important to verify the entry is correct because once it is saved, it cannot be edited. ***Note***: customers see **CLIENTNOTE** work logs on the FS website and on invoices and customers using Maximo will see all work logs

  f. Tap the "Save**"** button on the top right of the screen

  g. Tap the "Back" arrow twice to return to the work order on the *Work Order Tracking* screen

7. **If your work is completed for this work order**

  a. If you determine that your work order is complete, and no other work needs to be done on the work order:

   i. Complete your assignment by tapping the "Complete Assignment" button on the bottom of the *Work Order Tracking* Screen

  b. If your work is complete and there still needs to be other work performed on the work order, but there are no other assignments, please create a communication log and use the template "CU_OTHERTRADES". In this case, do not complete your assignment. Your supervisor will complete your assignment after creating a new one for the needed craft(s).

RESULT:

Work orders assigned to you will have been reviewed, labor entries and work logs will have been created, and if work has been completed, assignments on work orders will have been completed.