

Introduction

Beginning in the fall of 2007, Western Connecticut State University (WCSU) implemented a maintenance work order system that utilizes web based software called Maintenance Direct. The Facilities Management Team is excited to offer this new system to the WCSU community. The new work order system is user friendly, highly efficient and has the added benefit of the ability to track numerous items electronically. As work orders are generated you will be updated electronically as the work is assigned and completed.

I: Accessing the Work Order System

The work order system is a web based system that can be accessed via any web browser. Simply go to www.WCSU.EDU, access the Finance & Administration and select Dept. "Maintenance Trades" and click on the hot link for "Maintenance Direct". The organization number is 156396955. Your log in is your WCSU e-mail address.

If you are a first time user, you will be prompted to identify yourself to the system and to create a Login password. This password will be required anytime you log in to this system from a "new computer" the system will remember the ORG number and password if you use the same terminal regularly.

As a "requester" you will have access to be able to generate work orders for a variety of different trades including but not limited to; plumbing, carpentry, electrical, grounds, locksmithing and many others.

II. Requesting Work

The **Maint Request** page (reached by clicking the tab near the top of the page) displays the electronic request form. This form will need to be filled out every time you have a work request. In order to make things easier, the system utilizes a series of drop down menus, preloaded with our building names, locations, and trades.

Mandatory fields (marked with a red check-mark in a box) are required and can't be skipped.

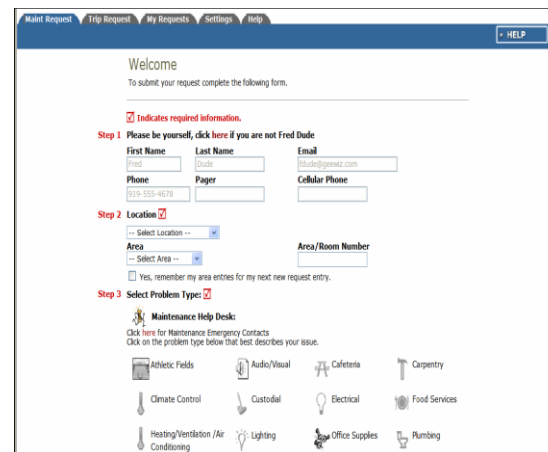
The balance of the information will be used by the university staff to facilitate completing the work. Please make an effort to be as complete in your request as possible, your efforts will expedite the work and will be helpful to those processing the request.

Follow these steps to fill out the form.

- Enter your **Location**, Building, Area, and **Area/Room Number**. Enter a specific room number if known or applicable.
- Select the **Problem Type** that best describes your issue. For example, if a faucet 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, and the field will be populated. *If this is an emergency, check the Maintenance Emergency box this work will get the highest priority!!*
- **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 **submission password**. This password will be the same for all Requesters. (set to "newuser2008")
- Click **Submit**.

Help is on the way!!!

The Maint. Request Page looks like this:



The screenshot shows the 'Maint Request' page of the Maintenance Direct system. The page has a blue header with navigation tabs: 'Maint Request', 'Trip Request', 'My Requests', 'Settings', and 'Help'. A 'HELP' button is in the top right corner. The main content area is titled 'Welcome' and includes a sub-header 'To submit your request complete the following form.' Below this, there are three steps:

- Step 1: Please be yourself, click here if you are not Fred Dude**. This step includes a red checkmark icon and a red box around the text. It contains form fields for 'First Name' (Fred), 'Last Name' (Dude), 'Email' (fdude@genetec.com), 'Phone' (919-555-4678), 'Pager', and 'Cellular Phone'.
- Step 2: Location**. This step includes a red checkmark icon. It contains dropdown menus for 'Select Location --', 'Area --', and 'Area/Room Number'. There is also a checkbox labeled 'Yes, remember my area entries for my next new request entry.'
- Step 3: Select Problem Type**. This step includes a red checkmark icon. It features a 'Maintenance Help Desk' section with a red checkmark icon and a link to 'Click here for Maintenance Emergency Contacts'. Below this is a grid of icons representing various trades: Athletic Fields, Audio/Visual, Cafeteria, Carpentry, Climate Control, Custodial, Electrical, Food Services, Heating/Ventilation /Air Conditioning, Lighting, and Office Supplies. The 'Plumbing' icon is highlighted.

III. Personal Settings

The **Settings** page allows you to customize your account. Allowing an individual to modify their personal contact information, the number of notifications you may get in response to your work order requests and gives you the ability to change your password

IV. Need Help??

Need help accessing the system??? The work order clearing desk is typically staffed Monday through Friday 8am to 4pm, help can be reached by calling 837-8425. Emergency help is available after hours by contacting the central heating plant for heating/cooling, ventilation, and refrigeration issues 7 days a week, 24hrs a day during the heating season and 6am to midnight during the rest of the year at 837-8329 or by calling the University Police Department at 837-9300 for all other issues.

Program administrators:

Bill McDevitt – Maintenance Trades

Luigi Marcone - Environmental and Facilities Services

V. Maintenance Request Status Reports

The program administrators will work with your requests and assign the work to the appropriate technicians, status updates are generated by the system whenever a work order is updated. Requestors will receive an e-mail using the following classifications:

Work Order Statuses:

1. **New Request:** All work orders initially are set to new request and mean 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.
3. **Complete:** A complete status signifies that all the actual work has been done. 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, Maintenance will close it. Once a work order is closed additional transactions can't be added.
5. **Declined:** The declined status defines any work orders that will not be done. They may be declined by a person in the facilities group for various reasons.
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 by another requestor.
8. **Void:** Voided work orders are work orders you would like to remove and will not show up in any reports unless specifically requested.
9. **On Hold:** Work placed on hold for any reason besides waiting on parts would have this status.
10. **Waiting for information:** Work in this classification is waiting on information or clarification regarding scope of work. No work will be completed until the clarification is made.

11. **Open Extended:** Any work order kept open for an entire Fiscal Year in order to keep track of labor and expenses for a routine/repeat task.
12. **Pending:** All Preventive Maintenance work orders which are automatically generated will initially have a status of "pending".
13. **Waiting Funding:** Any work order where the project has been approved but a funding source has not been determined.
14. **Deferred:** Any work order that has been put on hold for a long term basis until a funding source is identified or is included as part of a future project.
15. **Forwarded:** Any work that requires action by labor outside of the University.

VI. Keeping Track of Your Requests.

The **My Requests** page allows you a look at all the work requests you've made in Maintenance Direct.

- You can reach the **My Requests** page by clicking on the tab at the top of the **Home** page.
- 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 (NOTE- you must turn OFF popup blockers for this to print correctly):
- 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.

WESTERN CONNECTICUT STATE UNIVERSITY

Environmental & Facilities Services

Maintenance Direct Work Order System

User Guide Rev 2.3

