Procedures on Work Order Assignments in MicroMain

The following procedures are to be followed by all staff creating work assignments using MicroMain. All full-time staff have been issued a smartphone to access and complete work assignments using the software.

<u>**MicroMain Work Assignments**</u>

<u>Work Orders</u>

Work orders are written records of performed maintenance. They are used to assign maintenance to the areas, equipment and vehicles (assets) in the Park District system. Work orders contain information about maintenance, such as where and how it is to be done, who is supposed to do it, and any supplies needed to complete it. Work orders can be created either by using a desktop computer or smartphone.

<u>Creating Work Orders in MicroMain</u>

1. Open the Work Order form.
2. Click the "New Work Order" button to create a new record.
3. The current system date/time is assigned as the requested date/time for the work order.
4. Use the controls on the Work Order form to enter basic information about the work to be done. The following three fields are required for all work order records. After completely these, you can issue and even close the work order.
    - *Service:* Enter a brief description of the maintenance to be performed.
    - *Property:* Enter the primary maintenance location.
    - *Asset:* Enter the name of the asset that needs to be maintained. After entering an asset name, other information from the asset record is automatically added to the work order (primary contact information and asset comments).
5. Use the controls on the pages of the form to add other details to the work order. These details can be added any time before the work order is closed. Once the information below has been entered, click the "Issue" button to issue the new work order. Once issued, a work order's status changes from "Requested" to "Open."
    - *Basic Information:* Add basic details (e.g., location, time, priority) on the Work Order page.
    - *Instructions and Notes:* Add special instructions and other observations on the Description and Comments pages.
    - *Labor:* Add staff, contractors, work order activities, and estimated labor times on the Labor page.
    - *Parts:* Add parts and estimated part quantities on the Parts page.
    - *Other Costs:* Add any anticipated other costs on the Other Costs page.
    - *Tools:* Add tools required for the job on the Tools page.
    - *Inspection Points:* Add inspection points, asset specifications, and/or asset conditions on the Inspection page.
    - *Documents:* Add any required documents (e.g., maps, diagrams, safety sheets) on the Documents page.
    - *User Defined Data:* Add any additional information on the UDFs page.

<u>Completing a Work Order in MicroMain</u>

1. Open the desired "Open" work order record on the work order or Quick Ticket form.
2. Click the Complete WO button to open the work order close out form.
3. Use the controls on the form to verify completed date/time and work order detail updates listed below:
    - *Completed Date:* Verify the completed date/time of the individual work order.
    - *Account:* Assign the time/costs associated with the work order details to a specific account.
    - *Category:* Assign the time/costs associated with the work order details to a specific maintenance category.
    - *Time Spent:* Update actual labor time and any asset downtime.
    - *Parts Used:* Update actual part quantities.
    - *Reasons for Failure:* Enter primary and secondary failure codes.
    - *Meter Updates:* Update the asset's meters with the most current reading.
4. Click "OK" to close the work order.
5. The status of the work order changes to "Completed."
6. The label on the "Change Status" button changes from "Close" to "Re-Open."
7. Re-open a "Completed" work order if you need to update information. "Completed" work orders cannot be edited.
8. The "Completed Date" entered on the work order form is assigned as the Completed date/time for the work order. This information is stored on the Summary page of the work order form.
9. The label on the Service field changes to "Completed" in red letters.