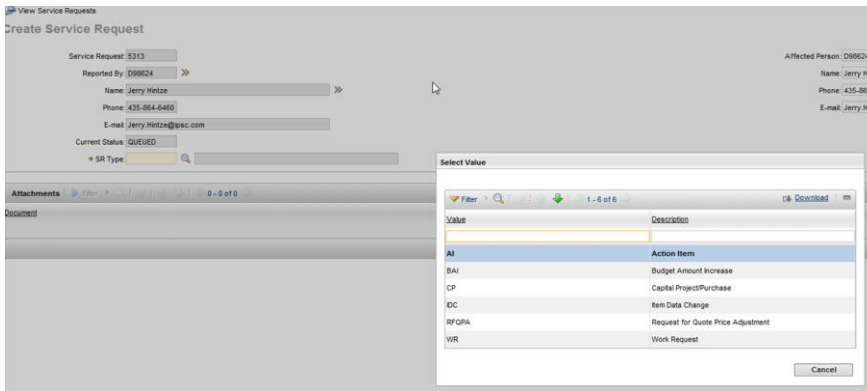# How to Handle Action Items in Maximo

Entering Action Items

1. From your Start Center, go to the Quick Insert dialog box and select "New Service Request"

2. Using the magnifying glass under SR Type, select "AI" or "Action Item".

3. Using the Magnifying Glass under Action Item Type, select the type of action item you would like to enter. "Central Safety" for action items being tracked by the Central Safety Committee. Walkdown for cleanliness walkdown action items. Other can be used for any other request for service or assistance.
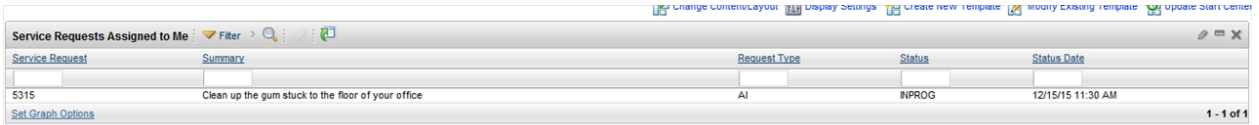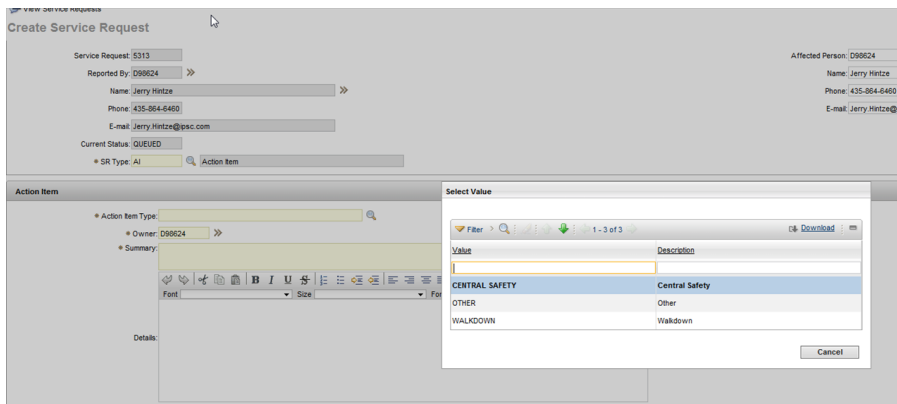

4. Use the chevrons in the "Owner" field to select the person you would like to assign to complete the action item. In the "Summary Box", enter a complete description of the work needing to be completed. You can use the long description dialog box if necessary. You can also attach files such as pictures using the "Attach Files" button at the bottom of the screen. Complete the

entry process by hitting the "Submit" button. Note: you will briefly see a dialog box at the top saying the process has started. No other changes are made to the screen.
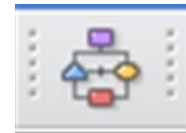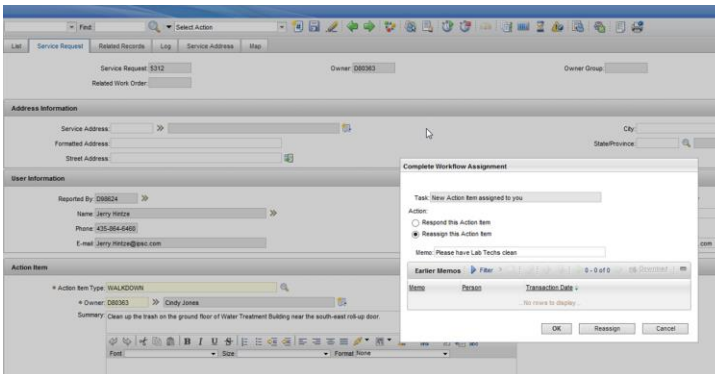
Reassigning an Action Item

1. Find the action item you would like to move.   Since you are the now the "Owner" of the Action Item, it should show up in your Start Center.
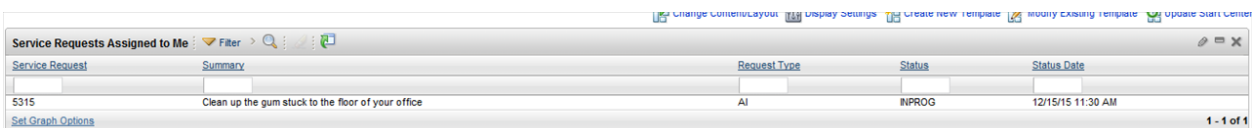

2. Open up the Action Item and change the "Owner" field using the chevrons to the new person responsible to complete the action item then depress the route work flow button at the top of the screen. The dialog box below will appear.   Select "Reassign the Action Item" and then complete the process with the "OK" button.

Note: if you hit the "Reassign" button in the dialog box it will accomplish the same thing. It will require you to reenter the "Owner" field a second time.

Completing an Action Item

1. Find the action item you would like to complete.   Since you are the now the "Owner" of the Action Item, it should show up in your Start Center.

2. Open the Action Item by hitting the desired Service Request number.   At the bottom of the portlet titled "Action Item" is a window called "Response". Maximo is looking for data in this text field to indicate that the work has been completed. The person assigned the Action Item

should enter in this field a brief description of the work completed to close the Action Item.   To complete the process and change the status of the Action Item to "Resolved", use the "Route Work Flow button at the top of the page.   The following dialog box will appear. Click on the "Respond to this Action Item" button and then OK.   The status of the Action Item will automatically change to "Resolved"