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 "Al" or "Action Item".

Service Request: 5313				Affected Perso
Reported By: D98624	»			Nameueurerson
Name Jerry H		»	D	Phon
			Leg.	
Phone: 435-86				E-m
	intze@ipsc.com			
Current Status QUEUE				
* SR Type:	Q		Select Value	
cument			Value	Description
			Al	Action Item
			BAI	Budget Amount Increase
			CP	Capital Project/Purchase
			IDC .	tem Data Change
				Request for Quote Price Adjustment
			RFOPA	

 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.

All					
Create Service Request					
Service Request: 5313			Aff	ected Person:	D98624
Reported By: D98624 >>>				Name	Jerry Hintze
Name: Jerry Hintze >>>					435-864-6460
Phone: 435-864-6460				E-mail:	Jerry.Hintze@ips
E-mait Jerry.Hintze@ipsc.com					
Current Status: QUEUED					
SR Type: Al Action Item					
Action Item	Select	t Value			
* Action tem Type:					
		Filter > 🔍 🕢 🔶 🧶 🗇 1-3 of 3 🗇	ot 1	Download :	-
• Owner: D98624 >>	· · · ·	Filter 🕐 🔍 () 🖉 () 🖓 () 🖓 () 🖓 () 1-3 of 3 🖓	C4+ 1	oownioad -	-
* Summary:	Valu	<u>ue</u>	Description		-
	For	NTRAL SAFETY	Central Safety		
Font V Size V	OTH	HER	Other		
	WAI	LKDOWN	Walkdown		
Details:					_
0.41000			1	Cancel	
					_

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.

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Service Requests Assigned to Me	✓ Filter > Q, j				0 = X
Service Request	Summary	Request Type	Status	Status Date	
5315	Clean up the gum stuck to the floor of your office	Al	INPROG	12/15/15 11:30 AM	
Set Graph Options					1 - 1 of

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.

Find Q Select Action Service Request Related Records Log Service Address Ma					
Service Request \$312 Related Work Order	Owner (080383		Owner Group:		
Address Information					
Service Address 🛛 🚿		D≱	City: State@revince		: 2
Street Address:	18	Complete Workflow Assignment			: "
Reporte by 200024 30 Name jerry Hetze Phone 4054046400 E.mei jerry Hetze@peac.com	*	Task: New Action ten assigned to you Action: O Respond this Action tem Reassign this Action tem Sierro: Please have Lab Techs clean		com	
Action here		Earlier Memos	0 0 0 0 0 0 0 0 0 0 Rommer		
* Action Item Type, WALKDOWN 4 Oxnear: DB0553 ※ Citidy Jones Summery: Clean up the treach on the ground Roar of Water Treadm			action Date + +s to display _ OK Reassign Cano	cel	
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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.

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Service Requests Assigned to Me	💙 Filter 🔸 🔍 🛛 🖉 🔁				0 = x
Service Request	Summary	Request Type	Status	Status Date	
5315	Clean up the gum stuck to the floor of your office	Al	INPROG	12/15/15 11:30 AM	
Set Graph Options					1 - 1 of 1

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"

