# Worktech & Maximo Basic Reference
# for
# General Users and Supervisors

## Contents

# Overview

The purpose of this document is to describe and lay out general information and specific steps for doing many of the more common things in WorkTech and Maximo. It is not intended to be an application instruction manual but a quick reference for everyday tasks. To keep the document length as small as possible, no screen shots will be included in the document, except Appendix B, but the specific steps will be included where applicable.

Additional general and specific Maximo process documents are available to everyone under the network folder S:\Maximo Training\ with various subfolders by topic.

Please see Appendix A for supplemental info that may prove helpful in answering the common question in Maximo "How Do I Find…..?"

# WorkTech Topics

## Entering time worked

**General Info:** All employees are expected to enter their own time worked and leave time taken. After the employee has entered and saved his/her time their immediate supervisor can then approve it. Approved time goes directly to Accounting for payroll processing.

**Specific Steps:** In WorkTech choose "Time Suite" from the top menu and then choose "Time Entry". Ensure your name is displayed under the Employee window. Choose "Insert" and enter an Earn Type, regular or overtime hours, a work order, any memo notes, and verify the default date. Each different work order worked on requires a separate line. Choose "Save" when the daily record is complete.

A time saving feature is provided in WorkTech to automate part of your time entry. If you consistently enter a similar pattern such as RG 10 click on the box next to an existing entry and click on "Memorize". It will prompt you to provide an Auto Entry title such as "RG 10". The entry is saved in the Auto Entries box for future use. You can then select the Auto Entry of RG 10 and click on "Auto Entry" on the toolbar and it will populate that saved entry. You could then supply the work order, memo note, or any other edits required.

An alternate method is also available to enter time on any mobile device. If interested in this option contact Kiley Chase in the IT group for download instructions.

## Requesting time off

**General Info:** All employees are expected to request their own leave time in advance and not expect to just enter a time off code on a daily time sheet after a discussion with their supervisor. This provides the supervisor the ability to approve the request and plan work in advance to ensure adequate coverage is available. The exception may be partial same day events that come up requiring you to take unexpected leave time. In these cases a verbal exchange with your supervisor may prove adequate.

**Specific Steps:** In WorkTech choose "Leave Time" from the top menu and then choose "Request Leave". Ensure it is your name at the top of the Leave Request window. Choose "Leave Type" to select the type of leave you are requesting and then fill in the desired start and end dates. Choose "Submit Request" to forward the request to your supervisor for approval.

## Viewing leave balances and pending leave requests

**General Info:** Employees can view previously submitted leave requests at any time within a specified date range and also view remaining balances for any leave type.

**Specific Steps:** To view leave requests choose "Leave Time" from the top menu and then choose "My Leave Requests". Note the start and end date ranges and adjust as needed. You can also cancel a leave request by checking the box next to the line to delete and then choose "Cancel Request"

To view your leave balances choose "Leave Time" from the top menu and then choose "My Leave Balance". Note the start and end date ranges and adjust as needed. You can click on the plus sign next to any leave type to expand into a detail view of activity.

## Considerations for accurate overtime and red hour tracking

**General Info:** Leave time requested, using a leave time request, goes directly to the availability lists that are used so solicit overtime. If a leave request isn't entered for time taken, the leave taken code doesn't transfer to the availability list, even if it is entered in the time entry application. Red hours are assigned using the availability list. To assure red hours are assigned correctly, it is to your advantage to use a leave time request when taking time off.

# Maximo Topics

## Start Centers

**General Info:** Start Center is the term for your home page in Maximo. Depending on job roles a user can have just a main home page or multiple tabs (start centers) across the top which provide grouping of related tasks in different areas of responsibility. The windows on each start center page are called portlets and display information queried from the system. The portlets are refreshed each time you go to a page or whenever you click on "Start Center" in the blue bar near the top right.
Note: Users normally never need to choose "Update Start Center". That option is only needed when requested from IT to roll out a new look or added features.

**The Blue Bar:** The top band in Maximo is for general navigation and use system wide. The following specifics may help:
- The Help option provides several options. The top option is always Maximo general help while the second option is always help specific to the application you are currently in and is more helpful.

- The Sign Out option is for normal signing out of Maximo. If the browser is locked up you may have to hit the X in the upper right corner of the browser to close out but this method should not be used normally.
- The Profile option is for personal settings and setting approval delegation.
- The Start Center option as mentioned above simply refreshes all portlets on the current screen.
- The Reports option allows access to all reports a user would normally have access to within the various separate applications. This is governed by security settings so the list is what is available to you in your job role.
- The Go To option is the application navigation tool used to access every application within your security privileges.

**The Gray Bar:** The top band in Maximo when colored blue means you are in that exact application in real time. If the bar at the top is gray in color it indicates that you came to the displayed screen by zooming over to it from another application to look for information. Usually there are two options in the upper right hand corner of the screen. One option is "Return" which means go back to the point you were last at. The other option is "Return With Value" which means I have found what I am looking for and want to return where I last was and in addition insert the selected record into the field of the application you came from.

**Customizing:** Users cannot alter portlets on the right half of the screen but can customize the left half. A common use would be to edit your "Favorite Applications" portlet to include applications you use frequently. To add an application to your favorites do the following:
- Click on the pencil icon in the upper right corner of the portlet.
- Choose "Select Applications" in the lower right hand corner.
- Search for and check the box next to the application you want to add and choose Ok. If there is a choice between nuclear (Nuc) and non-nuclear versions always choose nuclear.
- Choose "Finished". The new application is now in your favorites.

## Service Requests

**General Info:** Service Requests (SRs) are an all-purpose tool in Maximo to communicate needs of one group or person to another. All employees have access to create the type of SRs that are relevant to their job role. All SRs require approval of their immediate supervisor except Action Items. The types of SRs you may require are:
- WR        Work Request (for general plant equipment repairs)
- SS        Submitting a Safety Suggestion
- IDC        Warehouse Item Description Change
- CP        Requesting Tech Services to consider a proposed modification
- AI        Action Item to route to a single person

**Specific Steps:** From the Maximo start center choose "New Service Request" in the Quick Insert portlet on the left half of the screen. On the follow up screen click on the spy glass next to the "SR Type" field. Select the type of SR you wish to create which then displays more specific fields to fill out. All yellow fields are required. When the SR is ready click "Submit" at the bottom right

hand corner.  Note:  Action Items will be routed directly to the person you enter in the "Assigned To" field.  All other SRs follow normal approval of your immediate supervisor.

**Viewing Tip:**  When you want to search for existing SRs avoid the stripped down application under Go To > Self Service > Service Requests > View Service Requests.  This application has limitations not allowing you to fully search.  Rather use the full blown version under Go To > Work Orders > Service Requests which has the power and flexibility of other Maximo apps.

## Work Orders

**General Info:**  The WO is the primary object in Maximo which interrelates to many other processes.  A WO is authorization to perform work and expend funds in the form of labor, materials, and services.   WOs come from several sources.  1) Emergency WOs written by Operations supervisions via Emergency SRs.  2) Auto generated PMs for routine work.  3) Capital WOs stemming from capital based SRs.  4) WOs created directly by Planners or Engineers.  5) Repair WOs created as a result of approved Work Request or Safety Suggestion type SRs.

Work Orders go through many statuses from creation, planning, scheduling, and completion and is passed along from person to person via workflow.  Time spent familiarizing yourself with the Advanced Search feature on the List tab view in WO Tracking (Nuc) will pay big dividends later when searching for WOs in the many ways Maximo offers.

**Parts Status:**  Determining the status of parts for a WO can be a challenge as several things are at play.  Primarily, the "blue eyes" on the upper middle section of the Work Order tab provide the necessary status.  See Appendix A for more on that.  Additionally referring to the Related Records tab, Plans tab, and Actuals tab can provide a more complete picture.

**Logs:**  The log is essential for history of the job outlining what the craft personnel found, what remedial action was taken, and what follow up work is needed to fully resolve the issue.  It is expected that each craft person upon completion of a WO logs into the WO in Work Order Tracking (Nuc) and goes to the Log tab and creates a record by clicking on New Row.  This takes the place of the written notes on WO hard copies in our former TIMS system.

**Plans tab:**  This is the place where labor is defined and services or materials can be ordered.  If the WO is in an APPR equivalent status, adding material or services to the WO and clicking on Save will trigger PR generation behind the scenes.  Work Orders in WAPPR or WPLAN will not trigger financial action.

**Attachments:**  The attachments icon on the main Work Order tab should be used liberally to attach data sheets, photos of a problem area, or any other document or image that helps to clarify the job or provide better historical information.  You can attach any document type except .TIFF.

**Job Safety Analysis (JSA):**  The feature is found on the Safety/JSA tab of any WO.  This represents a Staff and Safety Section approved checklist of things that should be considered on significant jobs or jobs with a great inherent risk for accident.  The supervisor determines when

the form will be used.  It will be a piece of paper taken to the field and marked up and then the supervisor will enter the result of the JSA paper copy in the WO record in much the same way as a Log.  More than one JSA can be performed on a single WO.  Each significant task may require a separate JSA.

**Assignments:**  Currently a supervisor has an option to retain the workflow assignment even after handing the hard copy of a WO to a craft person for work execution.  When the hard copy comes back to the supervisor after the work in the field is done, he then routes the WO to Planning for closeout and auditing.  Optionally the supervisor can "assign" the WO to the specific craft personnel using the Assignments tab which moves the WO workflow assignment to that person(s).  This is only available before the first workflow option is accepted by making the craft assignment and then route the workflow to "accept" the WO.

Upon completion of the work the craft employee adds a Log entry and then routes the WO back to the supervisor to continue closeout.  This allows the supervisor to remember who he gave the WO to.  This feature is recommended for all crews as it is a precursor to how Maximo will operate once we go totally mobile.  Assigning the WO to the craft is the only way the craft will know the work needs to be done.

## Desktop Requisitions

**General Info:**  The Desktop Requisition (DR) is the tool most users will use to check out tools and buy material through the Warehouse.  A DR stands on its own when the request is for either material Items we have in the Warehouse or Stocked Tools we have in a tool room.  If however, the request is to actually purchase something we do not have the DR automatically converts to a PR which is what the Buyers will use to process a PO.  This would include all Services, Direct Material, and Items which are ORO without inventory on hand.  DRs are not routed for approval but PRs do require approval.

**Specific Steps:**  All users have an option in the Quick Insert portlet on their start center called "New Requisition".  Click this option to create a DR.  When totally complete click Continue and then click Submit.  The following checklist are things to consider when creating a DR.

1. Entering a description of the DR on the first screen is helpful for searching later and is what the approvers will see if the DR turns into a PR.  It is <u>not</u> the description of the material you are wanting to acquire.
2. The only field required on the first screen is a WO.  Enter any approved status WO and tab out of the field and the required charge information will populate.  Click Continue.
3. Add as many line items to the DR as needed.  Select a Line Type for each line and then fill out all the fields desired with yellow highlighted fields being required.  Note that by definition a "Material" is anything direct in which something will be received at the Warehouse dock including rentals.  A "Service" is anything direct in which nothing will ever be received at the Warehouse, e.g. A-Core coming out to make a concrete cut or a vendor coming on site to perform an inspection.
4. If the Item is a Condition Enabled Item you will have to select either Capital or New even though the field is not yellow highlighted.

5. Refer to Appendix A "How do I Find…." for tips on the best way to find the Item number you are looking for in the Inventory (Nuc) application.
6. For things you buy regularly you can add them to your personal Favorites list by clicking on the gold star icon near the right hand edge of the screen. After the Item is on your Favorites list when you want to buy it again you simply click on New Row and then click on Add Line Item in the lower right hand corner and choose Favorite Items. Then locate the Item in the list and click Ok which will drop it into the DR line for completion of deliver to, quantities, justification, etc.

## Purchase Requisitions

**General Info:** Purchase Requisitions (PR) are the financial instrument that routes through approval and is used by the Purchasing Section to create a Purchase Order. You will not create a Purchase Requisition in the Purchase Requisitions (Nuc) application. Rather, users will generate a Desktop Requisition which becomes a PR when it is submitted (see section above for details). Planners and others who request material on the Plans tab of a WO will also trigger creation of a PR if the WO is at an approved status. The only other way a PR is generated is through normal Warehouse reorder processes for bin replenishment.
Note that all PRs contain only a single PR Line.

**Viewing Tip:** The Purchase Requisitions (Nuc) app will still be used read-only by many users to search for orders by Buyer, Vendor, Requestor, and a host of other fields that can be accessed through the Advanced Search. Beware of one default setting. Maximo assumes when you are searching for a PR that you are only interested in current open PRs. If the PR you are looking which you know exists but does not come up using the List tab fields do one of two things. 1) Enter the PR number in the Find box at the top of the screen which ignores all WO statuses or filters that may be in effect. 2) Click on the Advanced Search spy glass and blank out the "History?" field to allow display of both open and closed PRs. Note that all PRs contain only a single PR Line.

## Warehouse and Tool Room concerns

**Tools:** Use the annual WO 39371 to buy out all tools from any tool room. Do not use the WO you are currently working on for a specific job. Return all tools to the tool rooms clean and in working condition.

**Repairable Items:** It is important that as you draw out rotating (repairable) items from Warehouse stock that you return the failed component as soon as possible. Return the red tag with the component. Reorder replenishment does not automatically occur on rotating items since Maximo is expecting the repaired item to come back either from an onsite repair or by a vendor repair.

## Using the Warehouse "Parts Picker"to get your parts

In Maximo, there is a disconnection between Work Order Tracking and the Warehouse applications and that is the communication of the time inventory parts and materials are actually wanted. The reservations are buried in a table with limited visibility. The Warehouse

designed an application called the Work Order Parts Picker intended for daily use by the end users to handle this process.

For a detailed step-by-step procedure to discover all aspects of the versatile application please refer to Appendix B at the bottom of this document or you can find it on the network at *S:\MAXIMO TRAINING\Warehouse Topics\Work Order Parts Picker.docx*

# Helps for Supervisors

## Approving time worked by your employees  (WorkTech)

**General Info:**  Each employee is responsible for entering their own time worked and their own leave time off.  The time entered is reviewed and approved by the employee's immediate supervisor and is then sent to Accounting for payroll processing.  It is encouraged that time entry and approval be made each working day.  Group entry of time for all members of a crew by the supervisor is available but discouraged.

**Specific Steps:**  Login to WorkTech and choose "Time Suite" from the top left menu.  Choose "Time Review" from the secondary menu.  Choose "Date" under the Date Scope dropdown and then select a Display Date.  If the crew you are wanting to approve is not shown select another crew from the Crew popdown list.

You can approve any employee with a status of "Wait".  You can either click the Employee ID to load labor transactions or check the little box next to the employee and click "Load".  You can also click on "Select All" and then "Load" to load your whole crew at once.  After review, you can click on "Approve" and then "Save" to approve all the selected employees.  The status will then change to "Done" and the color to green.

## Approving time worked by other employees  (WorkTech)

**General Info:**  You have the ability to approve other supervisor's employee's time if they are within your same department.

**Specific Steps:**  The steps are essentially the same as approving your own employees.  To view the other crew click on the "On Behalf" popdown list at the top of the screen and select the appropriate supervisor that would contain the employees you want to approve.

## Correcting a time entry error after approval  (WorkTech)

**General Info:**  You have the ability to make changes to a time entry that has already been approved but not yet processed by payroll.

**Specific Steps:**  To change a time entry in Time Review, "Load" the entries that need changed.  Check the box at the beginning of line(s) to be changed and choose "Unapprove". This will give you thRee (3) lines, an Original, a Reversal, and a New. Update the New line with the correct data and reapprove. The employee the change was made for, will be notified with a message the next time he/she logs into Time Entry.

## Approving leave requests (WorkTech)

**General Info:**  As a supervisor you will receive an email notification when an employee submits a time off request in WorkTech.  You can also see them any time under "Leave Time" in WorkTech.

**Specific Steps:**  You can click on the link contained within the email notification to review and approve the time off request.  You also click on "Leave Time" then "Employee Requests".  Review and then check the box beside each request you want to approve and then click on "Approve".

## Viewing your Staff Availability  (WorkTech)

**General Info:**  As a supervisor you will want to know when your employees have approved leave time and when you can expect them to be at work.  The Staff Availability tool built into WorkTech fills both requirements.

**Specific Steps:**  Login to WorkTech and choose "Time Suite" from the top left menu.  Choose "Staff Availability" from the secondary menu.  You will be presented with a series of options to pick from in the left column that are all self-explanatory.  Click on the plus next to each option to expand and see a detail view.  As with other places in WorkTech be aware of the date range indicated at the top of the screen which limits the information you are viewing to just that period of time.

## Service Request approval

**General Info:**  All first line supervisors company wide have a start center titled "30 - First Line Supervisors".  The top portlet titled "Service Requests Awaiting My Action" on the right side displays all the SRs of any type which need your attention or approval for the SR to continue in the workflow.  Most are unique to just the logged in user but in the case of Operations Department employees one or more supervisors will have approval access to accommodate 24/7 operation as well as loaned employees reporting to a supervisor other than their own.

**Specific Steps:**  You can click on the SR number directly in the portlet to display the detailed record in the Service Request application.  After your review, you can approve it and route the workflow by clicking on the "Route Workflow" icon which is near the right hand end of the toolbar.  You also have an option to deny the request at that point.  If you do deny the request, enter a memo note in the dialog before choosing Ok.  The original requestor will receive an email notification of the cancelation along with the accompanying memo note you wrote.

If there are multiple records in the portlet it saves a lot of time if you click on the green arrow in the title band which opens up the entire record set in the Service Requests application.  The time savings come from being able to review and approve each record as previously stated but then be able to use the green left or right navigation arrows on the toolbar to go to the next record immediately.

## Handling Action Item type Service Requests

**General Info:**  Action Items are the only SRs that do not go to the person's supervisor for approval.  They are intended to be a means to convey a specific need for action to another individual who could be in any department.  The recipient of an Action Item can either complete the request or reassign it to another person with a comment.  It should be noted that an Action Item can be completed without the actual concern fully resolved.  If, for example, a WO is written to follow up on the problem the Action Item can be closed as the problem is now being tracked by the WO.

**Specific Steps:**  As a first line supervisor you will see any Action Items assigned to you in your start center in the top portlet titled "Service Requests Awaiting My Action" on the right side.  It displays all the SRs of any type which need your attention.  The value of "AI" in the Request Type column of the portlet will be your clue that this is an Action Item.  For Action Items you can take two possible actions as follows:

1. You take care of the concern and will complete the Action Item.  You do this by entering a note in the "Response" field and then clicking the "Route Workflow" icon which is near the right hand end of the toolbar.  Choose the top option to "Complete this Action Item" and click OK.  The SR will go to a status of RESOLVED.
2. You need to reassign this to a different person you feel should be responsible.  You start by changing the "Assigned To" name on the Action Item.  Click on the chevrons next to the Dnumber and search for and select the proper person as done elsewhere in Maximo.  Click Save and then click the "Route Workflow" icon in similar fashion to the above and enter a "Memo" note in the dialog as to why the reassignment is needed before you click Ok.  The Action Item will now appear in the new recipient's portlet and the status will remain INPROG.

## Completing and closing Work Orders

**General Info:**  All WOs take two workflow stops at the first line supervisor level.  The first workflow step is when the WO is first received electronically either directly or via an Operations review.  The supervisor routes the WO at that point to essentially accept the work or optionally assign it to a specific craft person on your crew.   Maximo changes the status at that point to WORKING indicating that the crew is preparing to work on the job or is already working on the job.  At completion of the work the supervisor needs to review the WO and then route the WO on to the Planning Section for final auditing and closeout moving the status to FCOMP meaning Field Complete.

**Specific Steps:**  When work is known to be complete in the field locate the WO in the portlet titled "Work Orders Assigned to Me" and open it in the Work Order Tracking (Nuc) application.  After your review, you can approve it and route the workflow by clicking on the "Route Workflow" icon which is near the right hand end of the toolbar.  Choose the top option titled "Field Complete, Send for Labor check and route to Planner" and click Ok.  The WO status changes to FCOMP and goes to the Planner on the WO.  You have other options available to you as well in that dialog all of which constitute acknowledgement that the work is incomplete.

The supervisor should carefully review the WO to ensure it is a properly documented work order for history and cost purposes and all follow up work needed is identified properly. Before you route the WO for closeout and auditing please review the following as a minimum:

**Actuals:** Review the information on the Actuals tab and subtabs which reflects all the charges made to the WO. Ensure proper time has been reported and materials picked up.

**Parts:** Review the information on the Related Records tab. Ensure there are no pending Inventory Usage records or Reservations outstanding which would indicate that something has not been picked up at the Warehouse. Also ensure all PRs have a status of CLOSED and POs have a status of APPR and the "Receipts Complete?" checkbox is checked indicating that nothing is outstanding.

**Log:** Ensure that an appropriate entry has been created by the person completing the work stating findings, corrections made, and any follow up work still needed for a complete job. If you have additional information to add to the WO record or wish to correct a statement made by another, create your own new Log entry stating such. You cannot edit a log entry created by someone else.

**Attachments:** Any datasheets attached to the WO hard copy need to be returned to Planning. The rest of the paper work order can be thrown away.

## Purchase Requisition approval

**General Info:** All first line supervisors company wide have a start center titled "30 - First Line Supervisors". The portlet titled "Purchase Requisitions Awaiting My Approval" on the right side displays all the PRs which need your review and approval for the PR to continue in the approval workflow. The supervisor should review each PR for adequate description, proper pricing and quantities, justification, proper WO and GL Account information, etc. Any approver can make some edits to the PR as deemed necessary before continuing the workflow. All PRs will only have a single line.

**Specific Steps:** You can click on the PR number directly in the portlet to display the detailed record in the Purchase Requisitions (Nuc) application. Click on the PR Lines tab to look over the request. After your review, you can approve it and move the PR to the next approver by clicking on the "Route Workflow" icon which is near the right hand end of the toolbar. You also have an option to deny the request at that point. If you do deny the request, enter a memo note in the dialog before choosing Ok. The original requestor will receive an email notification of the cancelation along with the accompanying memo note.

If there are multiple records in the portlet it saves a lot of time if you click on the green arrow in the title band which opens up the entire record set in the Purchase Requisitions (Nuc) application. The time savings come from being able to review and approve each record as previously stated but then be able to use the green left or right navigation arrows on the toolbar to go to the next record immediately. See Appendix A for tips in searching for POs and PRs.

## Tag Request approval  (Operations only)

**General Info:**  Work Orders requiring the review, approval, and potential lock out/tag out assistance of Operations are routed through the Scheduler.  The trigger which Maximo respects to make this determination is the checkbox on the WO titled "Protection Required".  This indicates the WO originator is suggesting that the person performing the work will need, as a minimum, an Ok-to approval and optionally a full blown clearance with boundary tags.

**Specific Steps:**  There are two levels which are required to allow the WO to flow from the scheduler to the first line supervisor as follows:

1. Once the WO is scheduled it will show up in a portlet titled "Protection Required Work Orders" in the "Operations Tagging" start center in a status of WTAGAPPR. These tag approval requests can be acted upon by any OP1 or OP2.  Review the request and if you approve, click on the "Route Workflow" icon on the toolbar and select the top option of "Request of Tagging for this Work Order Approved".  This will move the WO to the group of Control Operators (CO) for processing in a status of WTAG.  If the request is denied choose any of the other three options in to the route workflow dialog to handle the request as desired.
2. After approval by Operation's supervision the COs can act on any WO with a status of WTAG.  The COs will find the WOs waiting on their action in the portlet titled "Work Orders Waiting for Tags" in the "Operations Tagging" start center.  The CO will then prepare the necessary approval documents within the external Eclipse application and route the WO to the supervisor by clicking on the Route Workflow icon in Maximo and choosing the top option of "Send to the First Line Supervisor for Options".  This will change the status to RELBYOPS.  The CO will also have the option of returning the WO to either Planning or Scheduler for additional information.

## Delegating your approval authority when absent

**General Info:**  If your job role includes approval authority of Purchase Requisitions or Service Requests you will want to designate a person to handle this approval when you will be absent and not available to act.  You will delegate this authority for a specific date range at which time the new approvals will resume normally.  Please note that any approvals that went to your delegate while you were gone will never show up in any of your Start Center tabs.

**Specific Steps:**  In Maximo click on "Profile" in the upper right corner of the screen near the IBM logo and choose Personal Information.  Enter the Dnumber of the person you delegate in the "Workflow Delegate" field.  Use the lookup chevrons next to the field if necessary.  Enter the "Delegate From" and "Delegate To" fields immediately below that.

Note:
The delegation will automatically commence at 12:01am on the day specified in the "Delegate From" box and will automatically expire at 11:59pm on the day specified in the "Delegate To" box.

# Appendices

## Appendix A - In Maximo How Do I Find….?

Starts on the next page


## Appendix B - Warehouse Parts Picker detailed instructions

Last 20 pages of this handout.