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Adopted from SchoolDude Solutions *MaintenanceDirect: Supervisor II Guide*
The Supervisor II role is limited to certain locations. In the Work Orders by Status section of the homepage, you will see all work orders for your assigned locations. Supervisor II's have limited access to reports and can only search for work orders within their locations via the search or advanced search.

**How to Log in**

- Open your web browser and type md.schooldued.com into the address bar and hit the Enter key. Bookmark this page or create a shortcut on your desktop to make it easy to come back to this page later.
- On the Account Login screen, enter your **Login Name** and your **Password**.
- Make sure that **MaintenanceDirect** is selected in the Go To box.
- Click **Sign In**.

**Home Page (Tab)**

Upon logging into the MaintenanceDirect you will be directed to the home tab. There are several main areas of the home tab:

- **Quick Launch**: This section provides commonly used links including New Request, Print Work Order Batch, and the User Forum (a place to submit questions and/or problems to your peers. You can also read questions others have posted.) There is also a link to the internal requester page, MySchoolBuilding.com
- **Work Orders by Status**: The graph that will appear in this section reflects the number of work orders by status. For a Supervisor II, any work order assigned to your location or craft will appear here. You can use the Period drop down menu to change the time period being displayed.

- **Assigned Work**: This section will show any work orders assigned or routed to you that have not been completed. Some work orders may need to be assigned to another employee.
- **Information Analysis**: These are links that provide access to various lists and reports.

Adopted from SchoolDude Solutions [MaintenanceDirect: Supervisor II Guide](#)
How to Assign a Work Order

There are a few ways to assign a work order in MaintenanceDirect. Both can be accessed on your home tab.

- If you would like to assign one work order at a time, in the Assigned Work section at the bottom of the home page find the work order that you would like to assign then click on the Assign button. **The EBS should only assign work orders to their local community techs or appropriate shop manager.**

- Select the user in the Assign/Route To field.

- Make any other additions to the work order information as needed and click Submit to save.

- The screen will refresh back to the home page. Scroll down to the Assigned Work section and find the next work order that you would like to assign.

OR

- Click on the number displayed next to **UNASSIGNED** to the left of the pie chart. This number allows you to review the new requests that you should assign to one of your community techs or a shop manager.

- You are now on the Unprocessed view of the work order. On this page you have the option to change any of the information that was selected on the initial request (priority, craft, etc). Select the person’s name from the Assign/Route To menu that you would like to assign the work order to. If this person will be performing the work make sure the box next to “Stop Routing” is checked.

- Once the user's name has been selected, scroll to the bottom of the form and click on the **Submit** button. You can also click on the **Submit & Print** button to print a hard copy of the work order.
If the assignee is the person performing the work, the popup box to the right will appear once you click submit. Click Cancel so that the work order reflects as a New Request for the assignee.

- Assigning a work order will remove it from your Assigned Work list on your Home page. It will be placed on the assignee’s home page.
- If you clicked on the number next to Unassigned on your home page to process requests, the screen will refresh with the next work order in the list that needs to be assigned. If needed, you can select a different work order to process from the drop down menu below Unprocessed New Requests.

How to Create a Work Order

- Click on the New Work Order tab.

  Fill out the work order form with the information applicable to the maintenance issue being reported. Any field marked with a ☒ is a required field. Even though some fields are not required by the system, they are important for proper assessment, assignment and reporting and are therefore required as part the work order process.

- Unless you change the Status, it will automatically default to “New Request” once you click the Save button at the bottom of the page (Note: Refer to Work Order Status document to know when to use each status type)

- From the Priority dropdown select “Medium” as the priority (non-emergency work orders should use this priority).

- You must enter everything under the Request Info section – Location, Building, Area, Area Number, Request Date and Description.

  - The Location dropdown is not necessarily the school/program name, but the physical building name according to the State Inventory (the school/program name should be selected from the School/Program Name under the Budget Info section).
o The **Building** dropdown has been populated with the address of the building according to the State Inventory. The Building is linked to the Location, so when you make the building selection only one address will appear. Presence

o The **Area** dropdown provides a general area while the **Area Number** allows you to specifically say where that area is (i.e. if the area is classroom then the area number is 105; if the area is boys restroom, then the area number is 3rd floor across from room 303, etc.)

o The **Request Description** must provide sufficient assessment of the request for proper assignment and prioritization

- You must provide the following under the **Assignment Info** section – Assigned To, Target Start (defaults to date created), and if being completed by LC tech the Target Completion and Estimated Hours

![Assignment Info](image)

- When creating a work order that will be completed by your local community tech, you must either assign it to yourself or assign it immediately to one of your technicians by selecting the name in the **Assigned To** field. If upon review of a work request you determine that it may need to be completed by a shop, you should assign it to the appropriate shop manager, never to the shop’s project manager or technician. **Unassigned work orders will automatically be routed to the EBS for review.** When assigning work orders to shops you should do the following:

  - For Engineering and Mechanical Services – only send requests to Engineering. Engineering will review the request and determine if it can be done in-house. If it cannot be done in-house, Engineering will assign the work order to Mechanical Services to contract it out.

  - For Repair Shop and Contract Maintenance – only send work orders to Contract Maintenance that are related to fire suppression, PA/Intercom systems, door entry systems, security, alarms, sprinklers, generators, emergency lighting, electrical, elevators and roofs. All other requests should be assigned to the community tech or sent to the Repair Shop. Repair will review the request and determine if it can be done in-house. If it cannot be done in-house, Repair Shop will send the work order to Contract Maintenance.

  - Grounds – Outside issues/requests should go to Grounds

Adopted from SchoolDude Solutions [MaintenanceDirect: Supervisor II Guide](#)
- Target Completion should be set no more than 30 days from Target Start Date
- Estimated Hours should be how long you anticipate it will take your tech to complete the job

- You must provide the following under the **Budget Info** section (Purpose, Budget, School/Program Name, Craft, Classification, Type)
  - From the **Budget** dropdown select the appropriate shop or region, this should be the shop/region responsible for completing the work. If multiple shops have to do work on the work order, when one shop completes the work order, they should create a duplicate work order and assign it to the appropriate shop manager (you must reference the original work order number in the Request Description).
  - From the **School/Program Name** dropdown select the school/program name, which may be different from the Location name.
  - The **Craft** and **Classification** must be identical (i.e. if you select flooring as the craft then you must also select flooring as the classification). The **Type** dropdown allows you to be more specific about the craft/classification (i.e. if you selected flooring for craft and classification, then the type of flooring could be carpet tile of ceramic tile, etc.).

- Once all of the required information has been entered, click on the Save button at the bottom of the page.

**IMPORTANT NOTE**: Work orders that do not have all the required information will be switched to the “Waiting More Information” status, which may delay work.
How to Search For an Existing Work Order

There are two ways to search for an existing work order in the system, you can either use the Search for box or the Advanced Search function.

- To search for a single work order, type the work order ID number into the Search for box then click Go. That will pull up the long form of the work order.

OR

- To search for multiple work orders, click on the Advanced Search link.

- The Advanced Search allows you to filter for work orders by selecting options in any of the available search fields (Location, Assigned To, Status, Craft, etc.).

- To make a selection, click on an option in the desired field. You will see that option highlighted in blue. To make multiple selections in a single field; make the first selection, hold the CTRL key on your keyboard, and then click on the next selection.

- Once all of the necessary selections have been made, click on the Search Now button at the bottom of the page.

- From these search results, you can access a work order by clicking on the work order ID number (WOID), you can print an individual work order by clicking on the printer icon next to it, or you can print the entire list as either a PDF or Excel document by using the icons at the bottom of the page.
How to Enter Transactions

- Pull up an existing work order by clicking on the work order number in the Assigned Work section of your home page or by typing the work order number into the Search for field.

- Scroll down the work order and look for the section titled Transactions. Click on either New Labor Transaction or New Purchase Transaction.

Labor Transactions

- Select the employee's name to which the labor is being applied.

- Enter the number of hours for each day that work needs to be recorded. Use the Calendar to the left of the screen to select dates not initially displayed. To differentiate between different types of labor time, click the OT (Other Time) link next to the day. Enter the appropriate hours into each field and click on Save.

Entering Multiple Purchase Transactions

Depending on how your account was set up, you may also have the ability to enter labor hours for multiple days on multiple work orders at one time.

- If available, click on the Transactions link in the Information Analysis section of the home page.

- Hover over the Shortcuts menu and click Add Labor.

- This page defaults to all work orders that are assigned to you. You can select a different user at the top of the screen to enter their hours. And you can filter the list for a particular status by using the Status drop down box at the top of the page.

- Enter the Action Taken information into the field below the Work Order ID number.

- Enter Regular Labor Hours under each date that you worked on this work order.

- Other time, such as Overtime, can be added by clicking on the OT link for that date.

- Enter the Actual Completion Date in the field.
• You can mark the work order complete by checking the box under **Work Complete**?

• Click the **Save** button to save the information entered for all work orders.

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**MySchoolBuilding Requests**

Requestors are only able to enter new work orders into the system. Once they have entered a request, they can view it but will not be able to change it. Requesters use the MySchoolBuilding.com page to enter requests. Principals are the only school based personnel who will be given requestor rights. Refer to the two page MaintenanceDirect Requester Guide for instructions on how they can submit requests.

- MySchoolBuilding requests are automatically routed to the appropriate EBS for review.

- Upon review of the request, you must select the appropriate School/Program name because the Requestor does not have access to the dropdown (limitation of the system).

- If the request has the required information to make an assignment, then you may choose to assign the work order to one of your local community techs or to the appropriate shop manager. If ALL of the required information is not provided, request the additional information from the school and turn status to “waiting additional information”. Shops may do the same if an EBS assigns a work order to them with insufficient information.