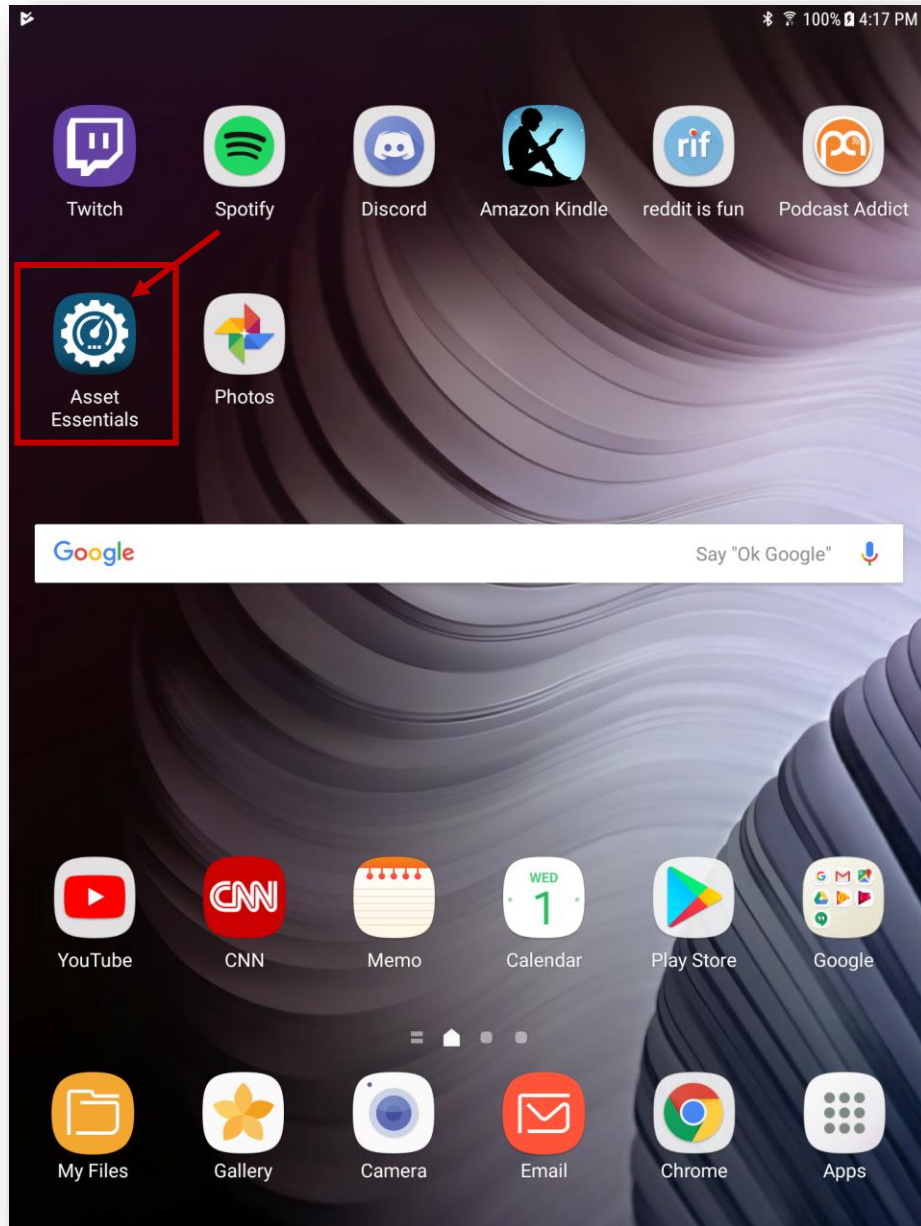


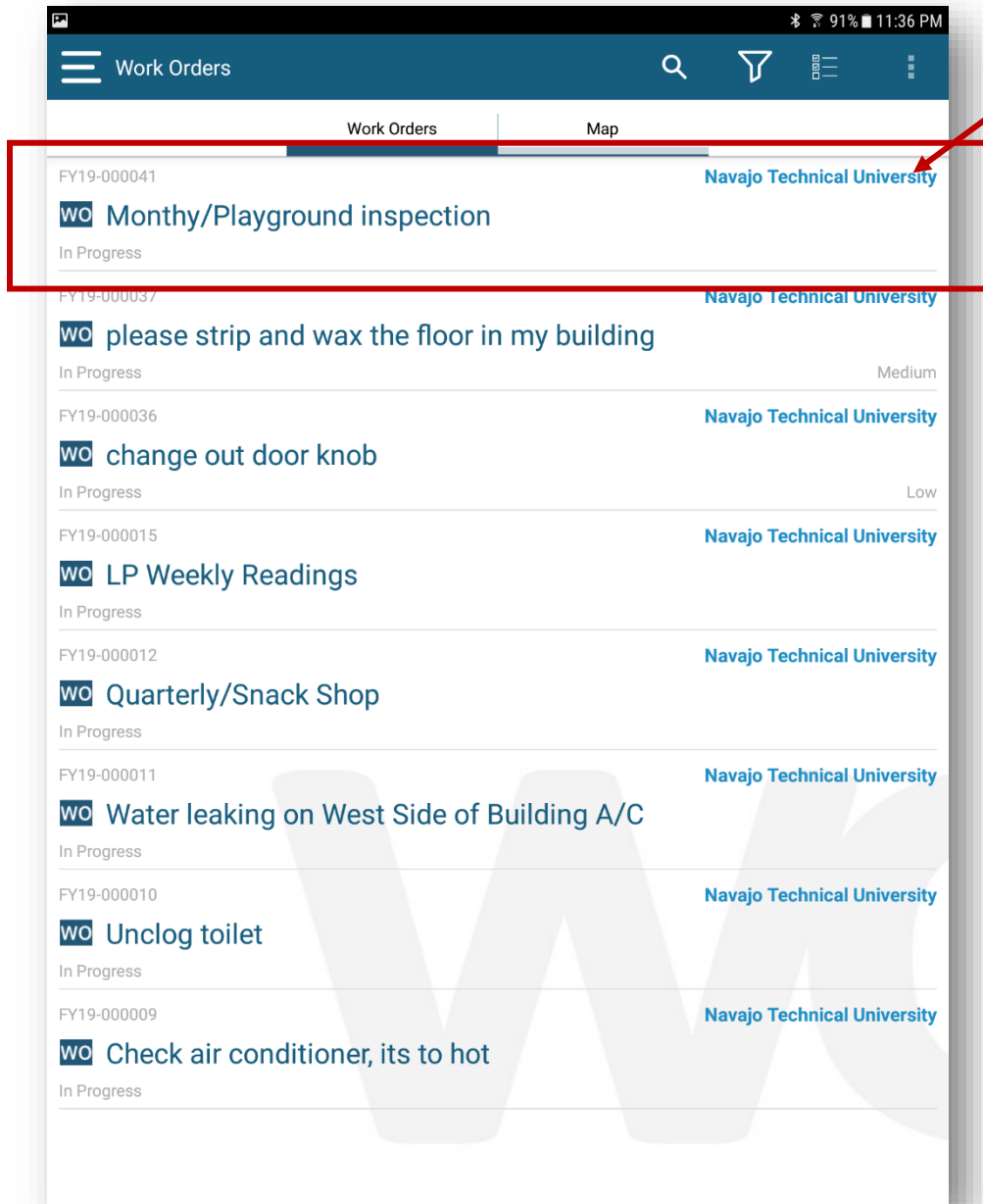
This tutorial will cover the basics of managing a preventative maintenance (PM) work order through the Asset Essentials mobile app. The main difference between reactive maintenance (RM), and PM work orders are that PM work orders are pre scheduled and automatically generate. Click the Asset Essentials icon to open up the app.

NOTE – We have a detailed help page that can be found [HERE](#). Also, support contact information is located on the bottom of each page.



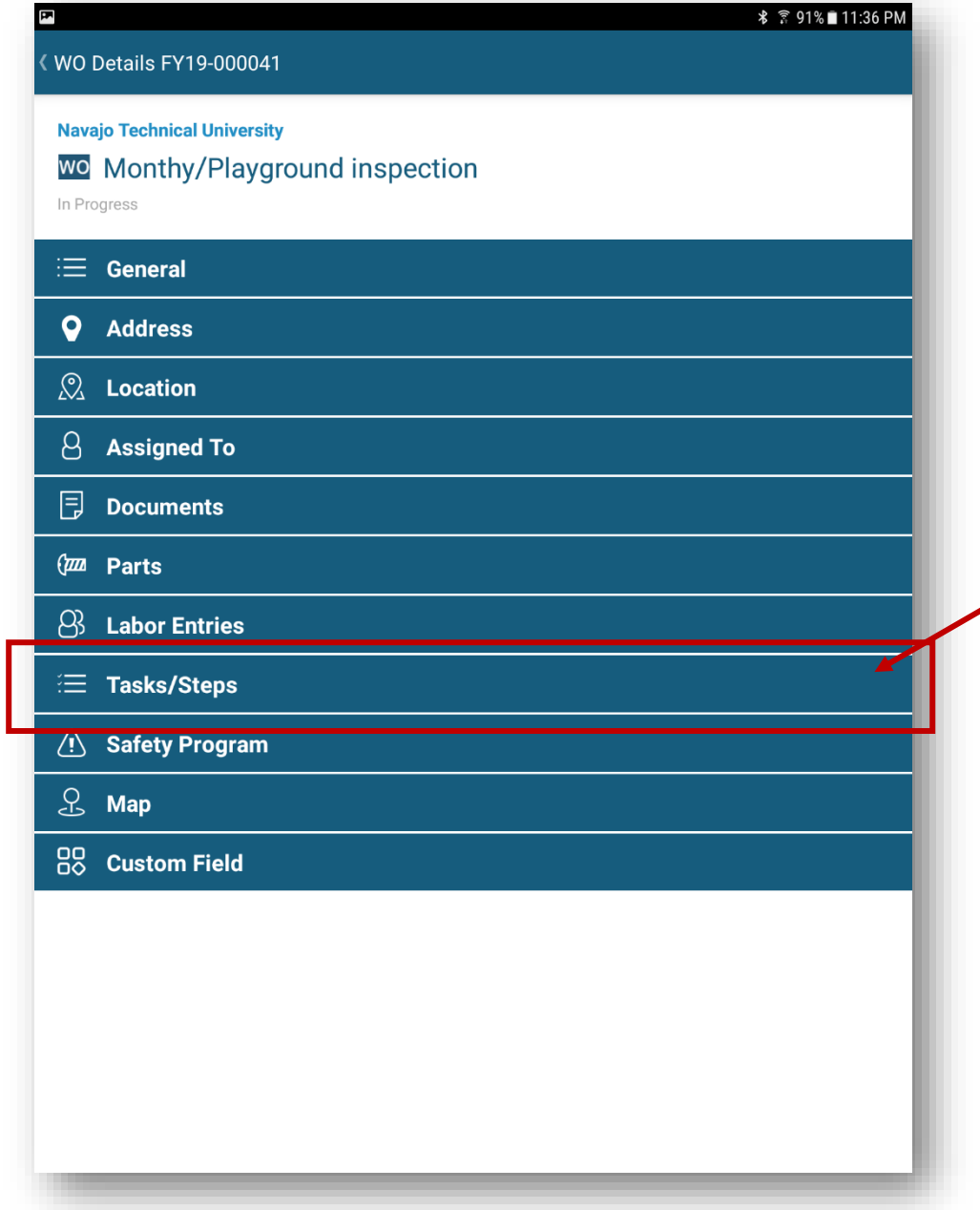
The below image is a screenshot of the work orders home screen. You will only see reactive and preventative maintenance (PM) work orders that are assigned to you.

In order to view a PM work order, click the PM work order on the tablet. In this case, we are going to click on the monthly playground inspection PM work order.

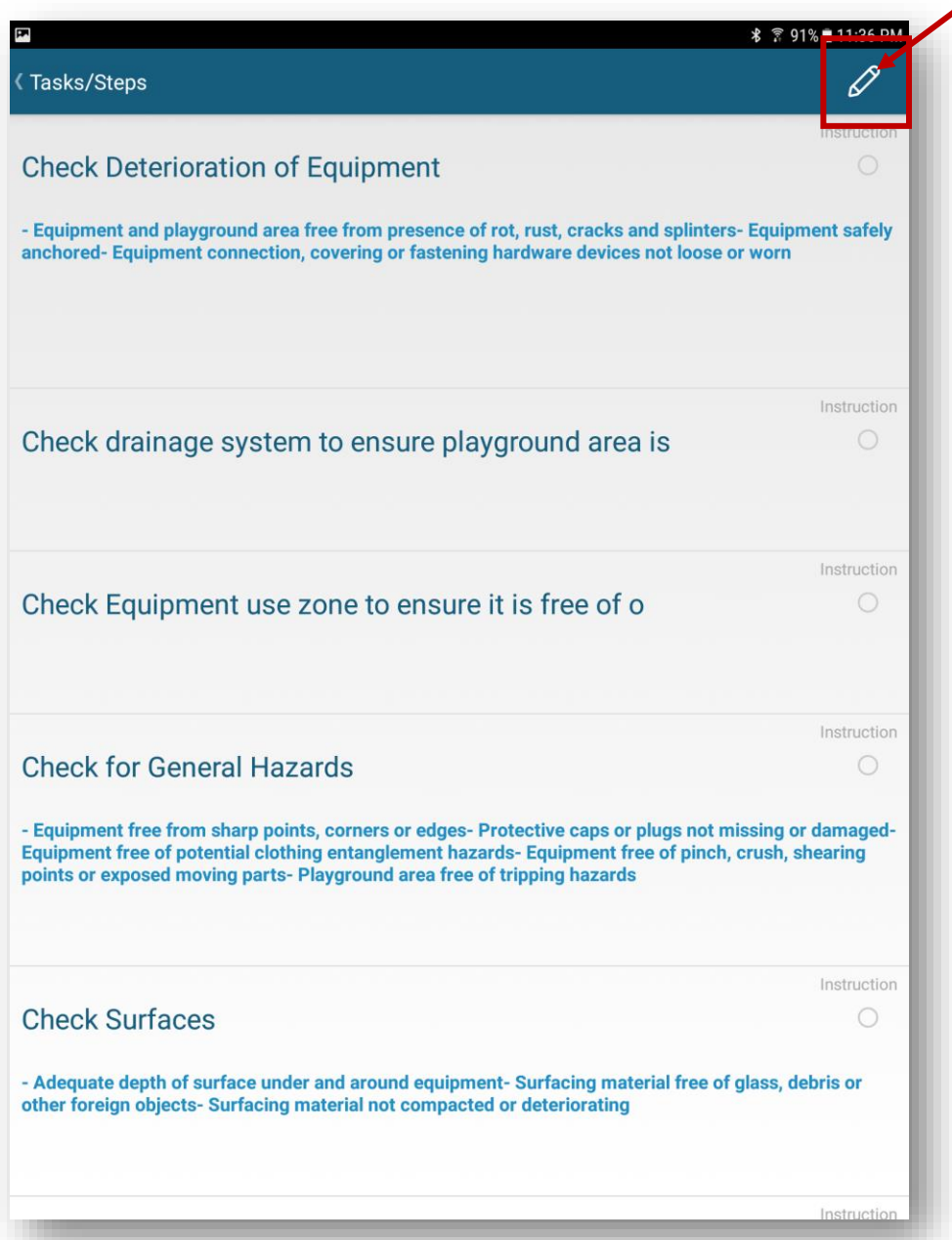


The first item we will cover in this section is the task list associated with the PM work order. This is where you will be able to see, and check off any tasks that are required to complete the PM work order.

To access the task list, click the section titled “Tasks/Steps” outlined in the image below.



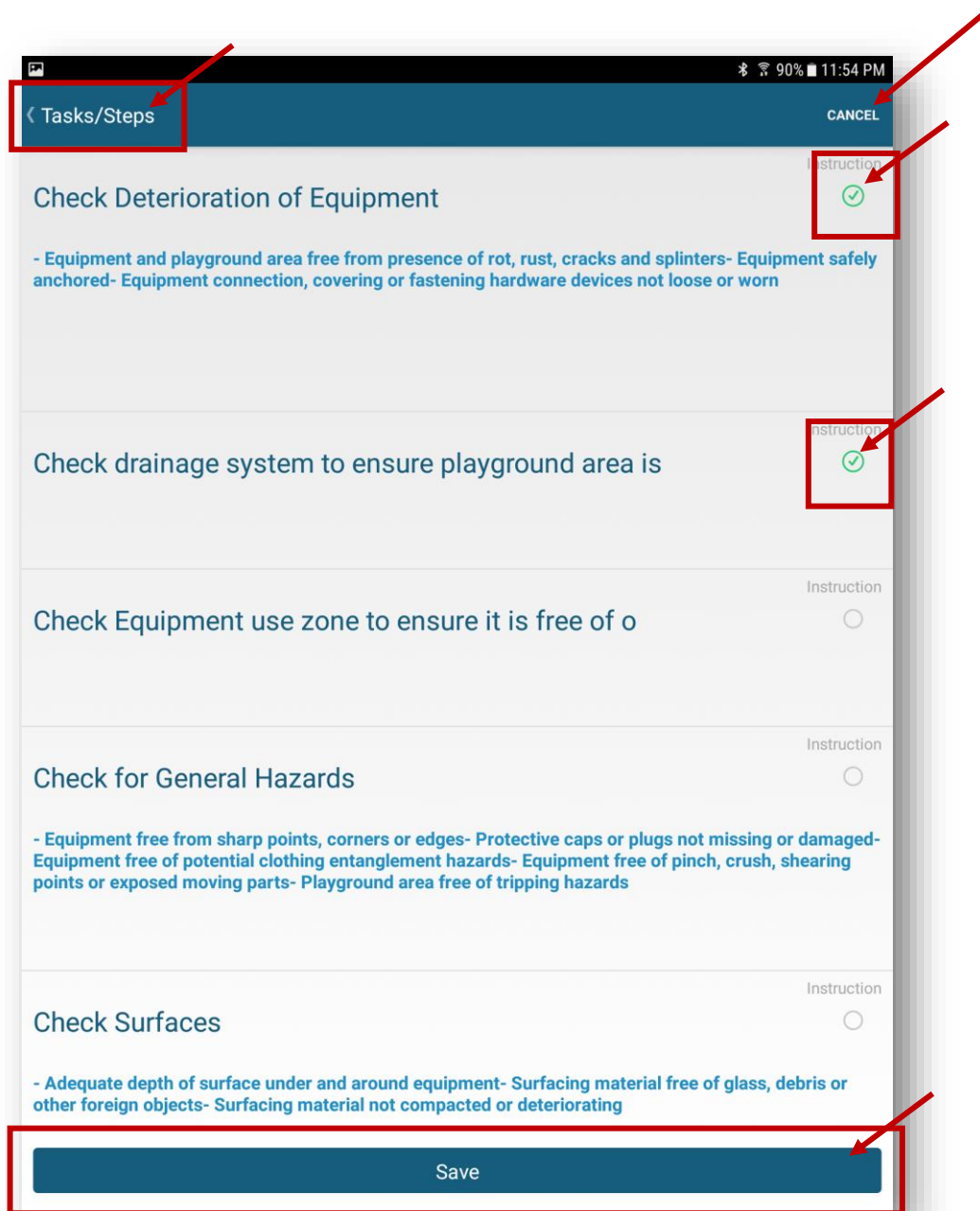
Next, you'll notice all of the tasks associated with this playground inspection PM. Checking off the tasks is the next step in the process. To do so, click the pencil icon in the upper right hand corner of the screen.



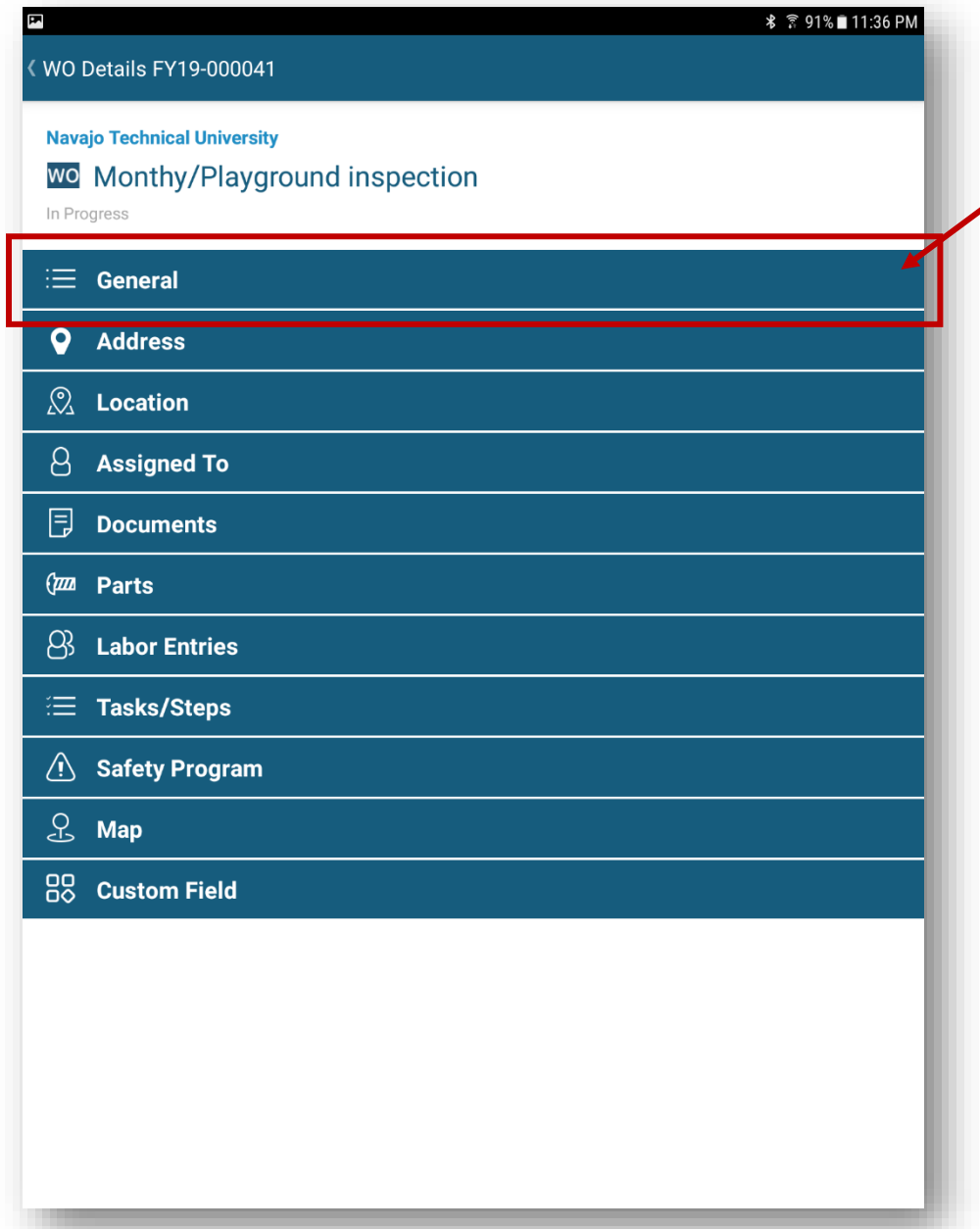
After you click the pencil icon, you will be able to check off each task for the PM work order by clicking the little green circle to the right of each task.

Once each task is checked off, click “Save” on the bottom of the page. After you click save, click icon in the upper left hand corner to return to the home screen of the work order.

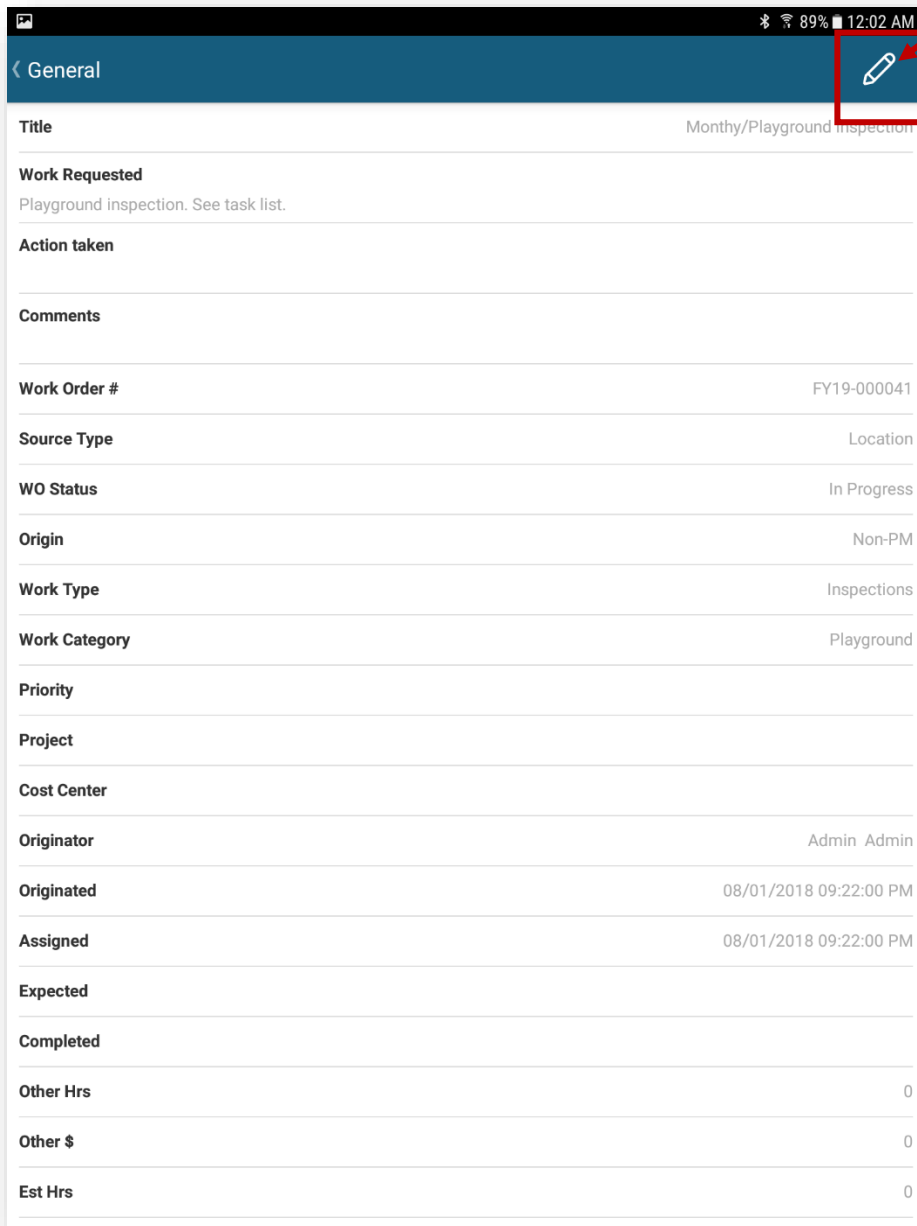
NOTE – if you ever want to go back to a previous page, click the left facing arrow on the upper left hand corner of the screen.



We have now returned to the home screen. Now that we have checked off the individual tasks for this PM work order, it is time to manage the rest of the work order. Click the “General” tab as seen in the image below.



Next, click the pencil icon in the upper right hand corner which will allow you to edit the details of the PM work order.



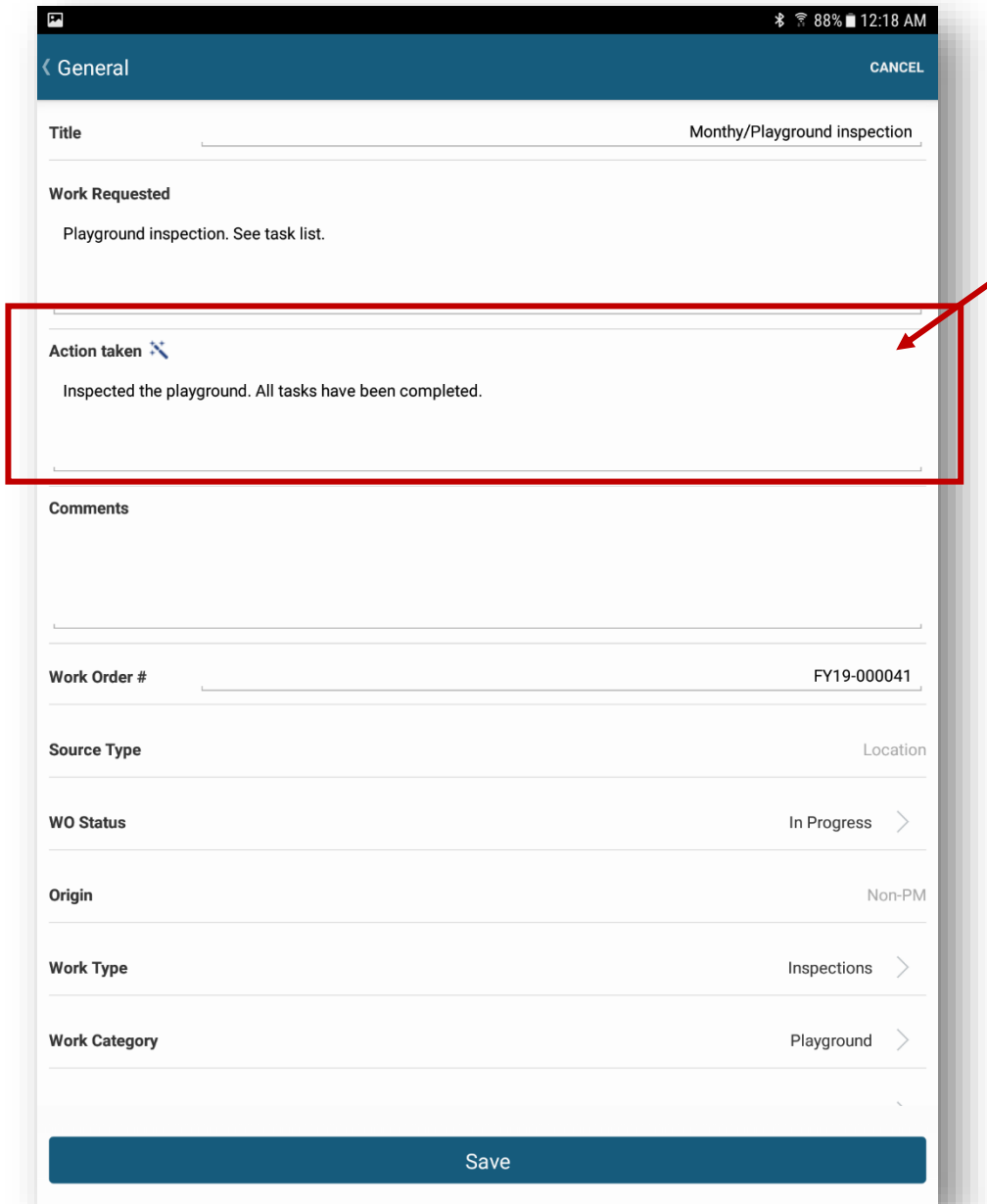
The screenshot shows a mobile application interface for a work order. At the top, there is a status bar with a battery icon, 89% battery, and the time 12:02 AM. Below the status bar is a dark blue header with a back arrow and the text "General". In the top right corner of this header, a pencil icon is highlighted with a red box and a red arrow pointing to it. The main content area is a list of fields for a work order:

Title	Monthy/Playground inspection
Work Requested	Playground inspection. See task list.
Action taken	
Comments	
Work Order #	FY19-000041
Source Type	Location
WO Status	In Progress
Origin	Non-PM
Work Type	Inspections
Work Category	Playground
Priority	
Project	
Cost Center	
Originator	Admin Admin
Originated	08/01/2018 09:22:00 PM
Assigned	08/01/2018 09:22:00 PM
Expected	
Completed	
Other Hrs	0
Other \$	0
Est Hrs	0

Now you will be able to edit the PM work order. The title is the subject of the PM work order. This section is automatically populated by the system.

Action taken is a very important section of the work order. This is where you need to be as descriptive, and as clear as possible with what actions were taken to complete the PM work order. Although we did check off the tasks, it is required that you are descriptive, and clear with the action taken.


TIP – You can click the microphone icon on your tablet to use the voice to text feature instead of typing out the action taken.



< General CANCEL

Title Monthly/Playground inspection

Work Requested
 Playground inspection. See task list.

Action taken  ↗
 Inspected the playground. All tasks have been completed.

Comments

Work Order # FY19-000041

Source Type Location

WO Status In Progress >

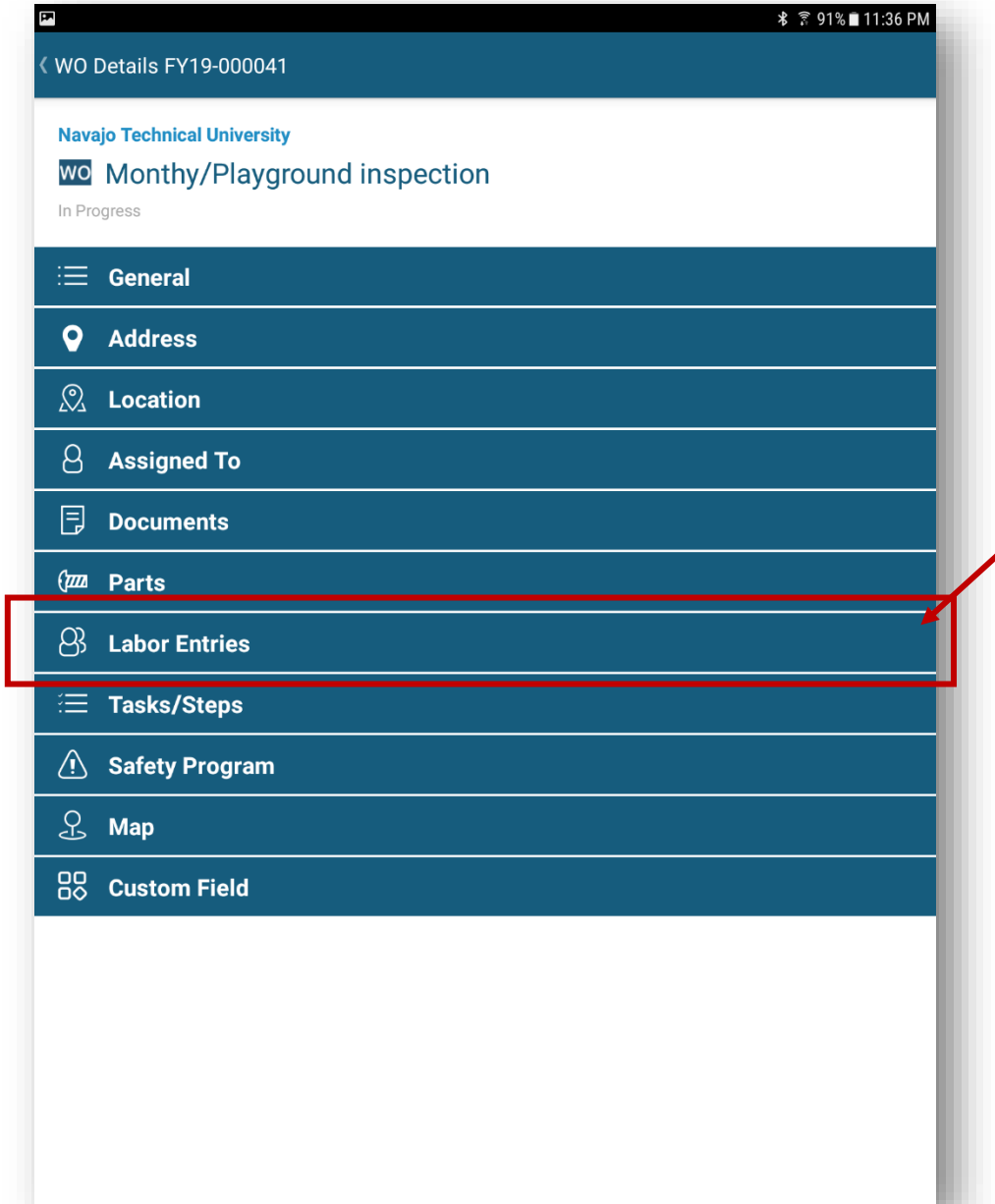
Origin Non-PM

Work Type Inspections >

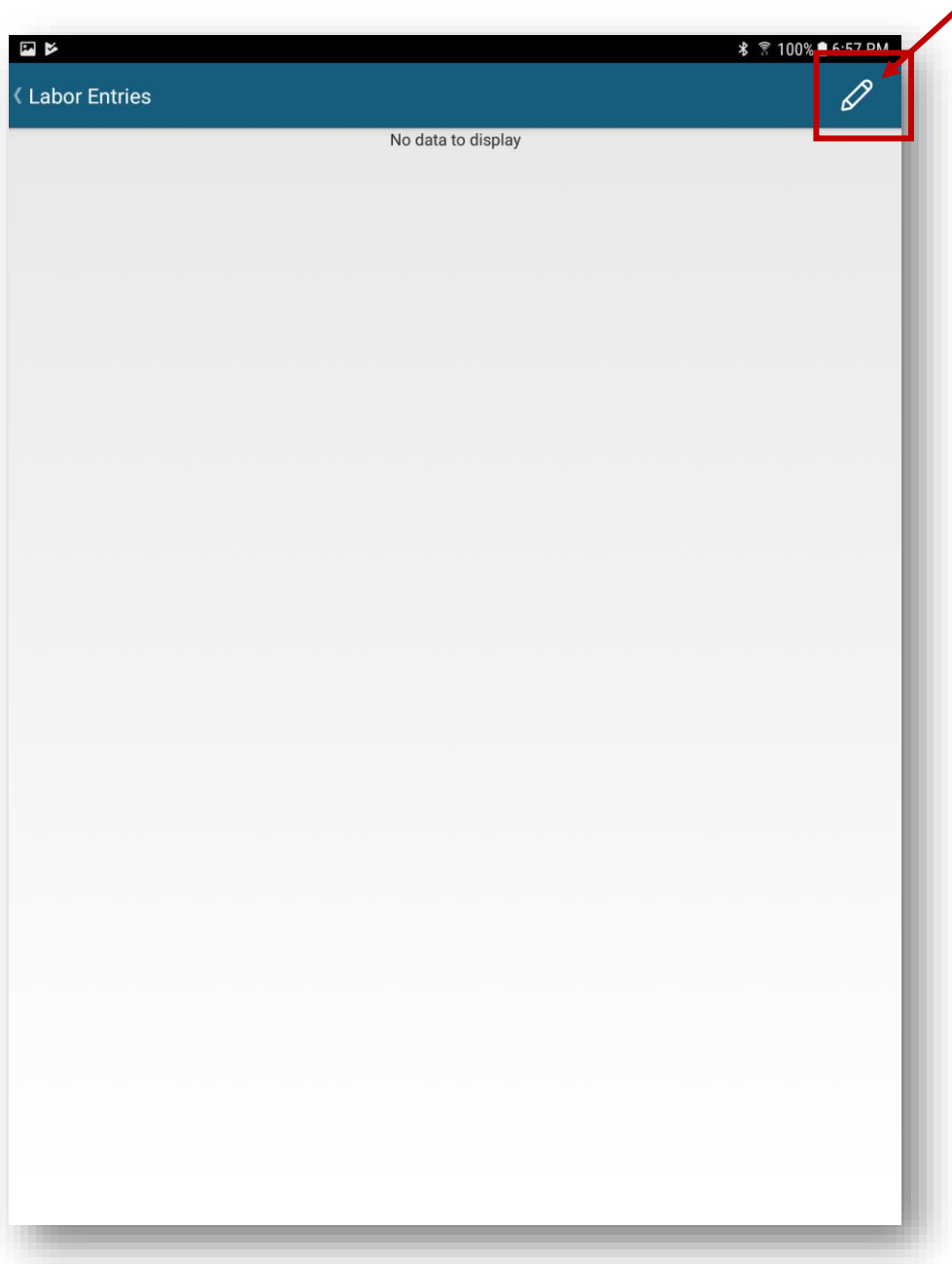
Work Category Playground >

Save

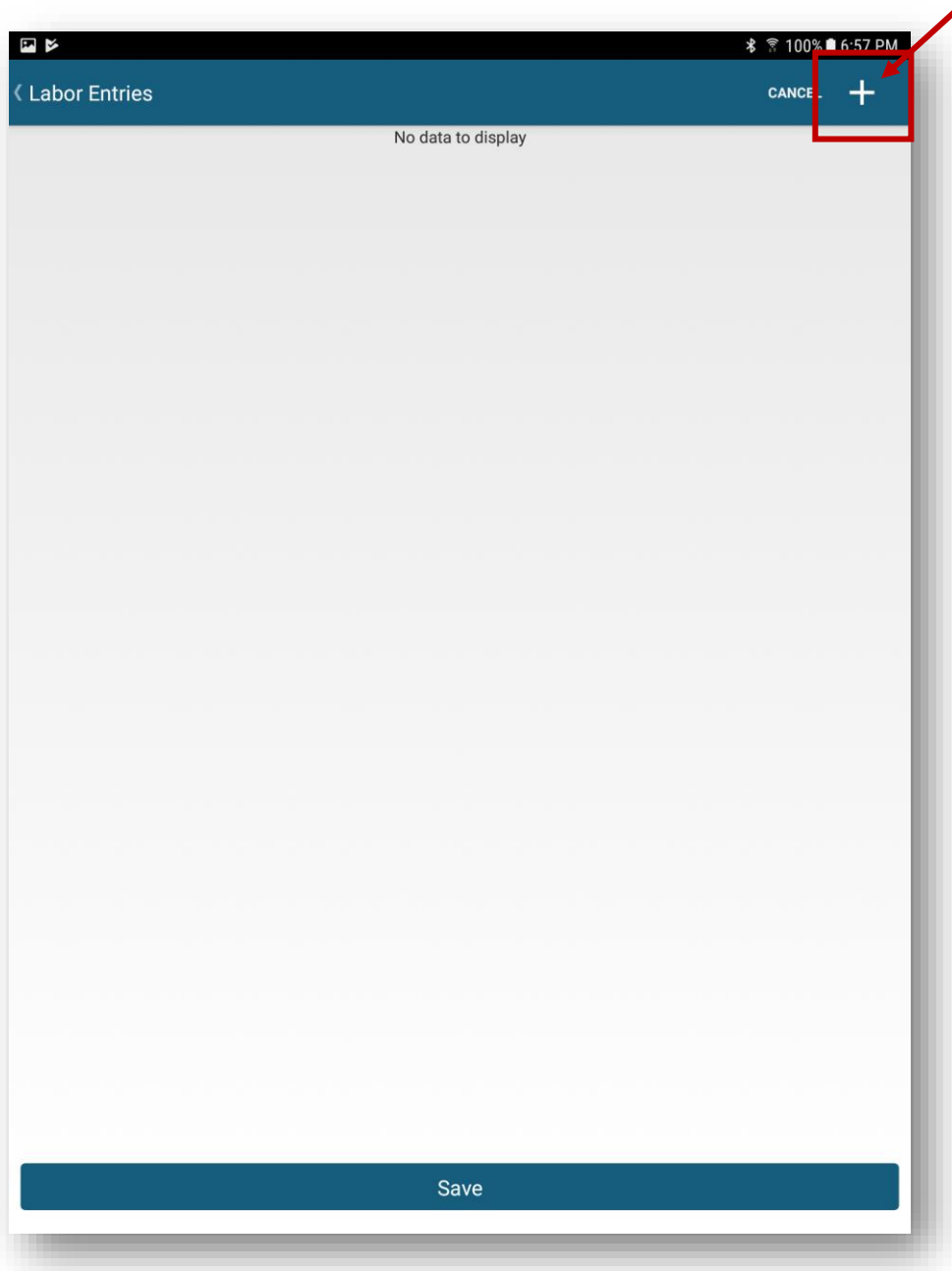
The next step is to add your labor. Click on “Labor Entries” as you see in the image below.



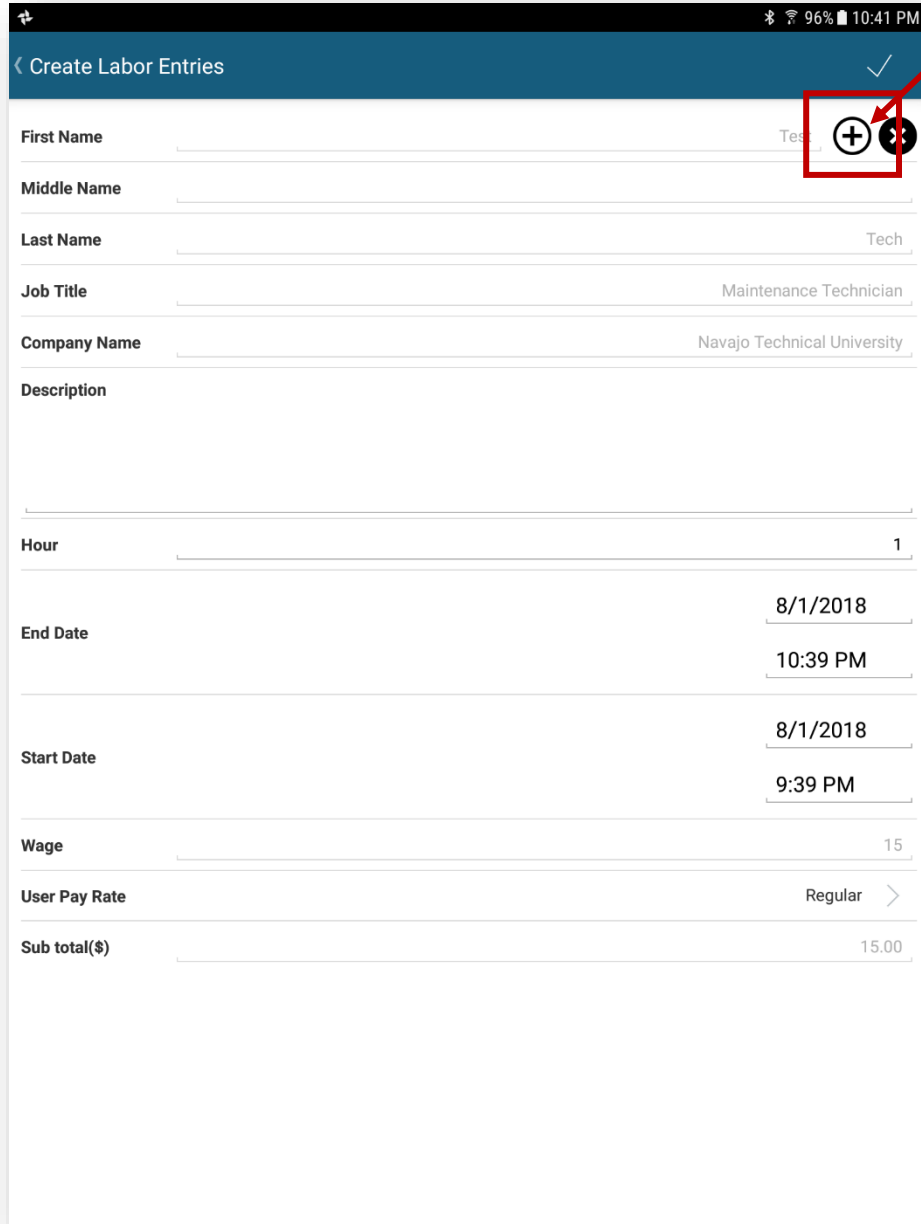
Once “Labor Entries” is clicked, the following screen will be presented. To start adding your labor, click the pencil icon in the upper right hand corner.



The next screen you'll see will now have a + symbol in the upper right hand corner. Click the symbol to add your labor hours.



Next, we'll be able to fill out the labor entry form. Click the + icon in the upper right hand corner of the page. From there, you'll have the option to "Select Me". Once all of the key fields are filled out, click the check mark on the upper hand corner of the screen.



< Create Labor Entries ✓

First Name Test + -

Middle Name

Last Name Tech

Job Title Maintenance Technician

Company Name Navajo Technical University

Description

Hour 1

End Date 8/1/2018
 10:39 PM

Start Date 8/1/2018
 9:39 PM

Wage 15

User Pay Rate Regular >

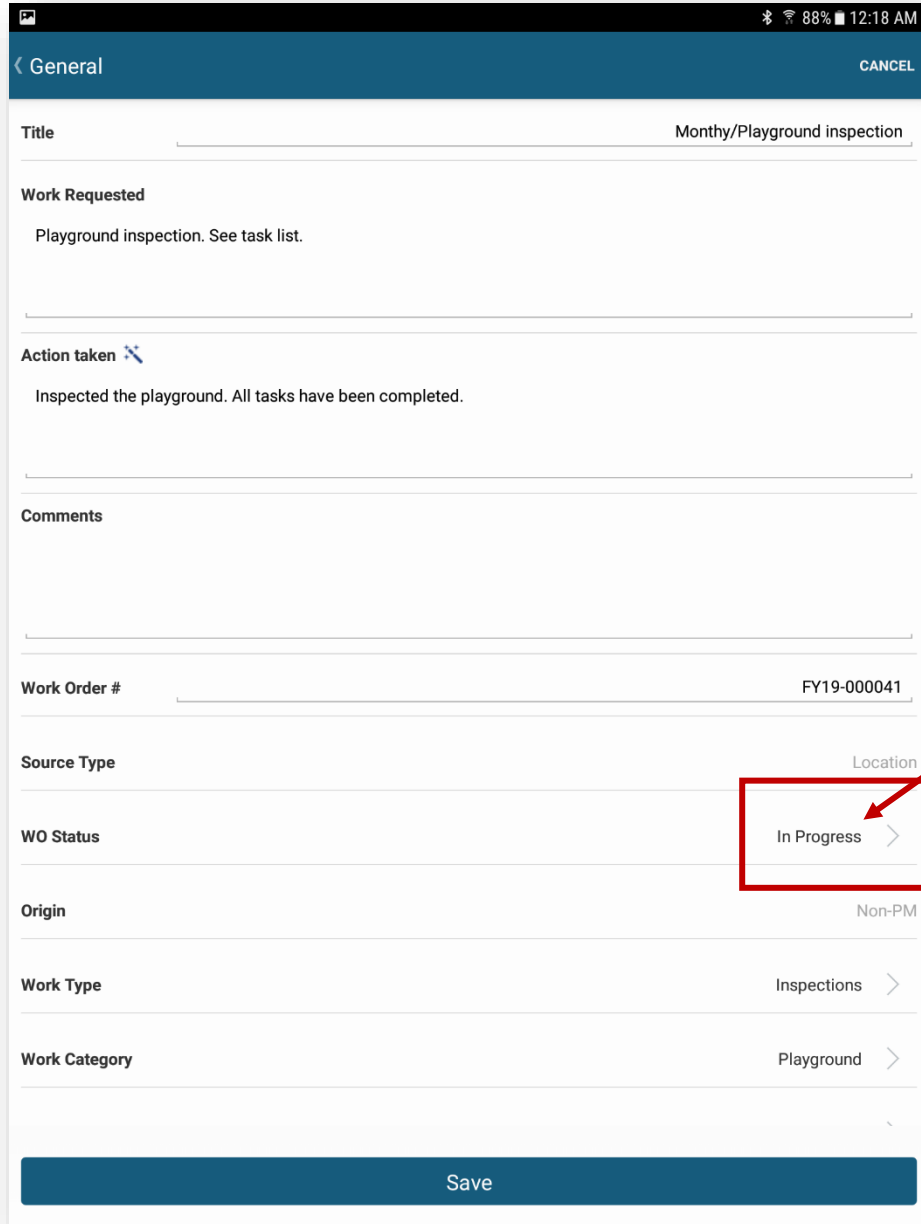
Sub total(\$) 15.00

As you can see from the screenshot below, the labor has been entered.

NOTE – do not forget to save the labor entry by clicking “Save” on the bottom otherwise the labor entry will be lost.




The “WO Status” is another important field. The status will default to “In Progress” when you first click on the work order. When you complete the task list, and add the action taken information, you’ll be able to change the status of the work order. Go ahead and click where it says “In Progress”.



< General CANCEL

Title Monthly/Playground inspection

Work Requested
 Playground inspection. See task list.

Action taken 
 Inspected the playground. All tasks have been completed.

Comments

Work Order # FY19-000041

Source Type Location

WO Status In Progress >

Origin Non-PM

Work Type Inspections >

Work Category Playground >

Save

After you click “WO Status”, the app will allow you to change the status of the work order. There might be situations where you don’t have the parts necessary to complete the work order, so you can change the status to “Parts on Order” or “On Hold”. Once you have completed the work order, changed the status to “Completed”.

NOTE – you must add your labor hours before you mark the PM work order as “Completed”.

