

DOCUMENT TYPE	☐ Administrative Directive ☒ Operating Procedure ☐ Guideline ☐ Standard		
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APPLIES TO	Facilities Development & Operations		
SUBJECT	Technician WO Processing Procedure		
RESPONSIBLE ADMINISTRATOR	Senior Director, Maintenance and Operations		

Purpose

This procedure establishes a standardized approach for using TMA to effectively manage work orders. This procedure ensures consistency, efficiency, and accountability in managing work orders and service requests while improving customer communication and support. Work orders will fall into two basic categories after the technician attempts the task on the work order: the work is finished, or further work is required. This procedure describes the process necessary to route the work order correctly.

Procedures

Work Finished

1. Access the WO List by clicking the number in the *Scheduled WOs* or *My Open DINs* box on your Dashboard
2. Select the applicable WO by clicking on the WO number
3. Click the *Edit* Button in the upper left corner of the WO.
4. Click the *Costs* tab in the upper left portion of the WO
5. Click the *Post Labor* Button
6. Change the Status of the task to *Finished in Field*, enter the hours worked, and the finish date in their respective weeks.
7. Click the *clock* icon to enter your name and time stamp the comments, then enter *Technician Comments*.
8. Technician comments must contain the following elements:
 - Description of the problem found, including location
 - Description of repair or adjustment made
 - Description of any tests conducted and current status of equipment
 - Description of further repairs or troubleshooting necessary
 - Description of any communication with building occupants
9. Click the *Save* button at the bottom of the pop-up window
10. Click the *Identity* tab in the upper left portion of the WO
11. Change the Status of the WO to *Finished in the Field*
12. Fill in the *Finish* date of the WO using the *Calendar* icon

13. Click the *Save* button in the upper left corner of the WO.

Further Work Required

Parts Needed

1. Click the Results tab in the upper left portion of the WO
2. Enter parts information in the Parts Request / Response field in the Parts Request section of the WO as applicable.
 - a. Description of part(s)
 - b. Quantity of part(s)
 - c. Manufacturer
 - d. Model number
 - e. Item number
 - f. Vendor
3. Click the Identity tab in the upper left portion of the WO
4. Change the Status of the WO to Parts Requested

Further Work Required Using The Same Task

1. Access the WO List by clicking the number in the Scheduled WOs or My Open DINs box on your Dashboard
2. Select the applicable WO by clicking on the WO number
3. Click the Edit Button in the upper left corner of the WO.
4. Click the Costs tab in the upper left portion of the WO
5. Click the Post Labor Button
6. Enter the hours worked and the date worked.
7. Click the Work Not Done Box in the Completion section of the task.
8. Click the clock icon to enter your name and time stamp the comments, then enter Technician Comments.
9. Technician comments must contain the following elements:
 - Description of the problem found, including location
 - Description of repair or adjustment made
 - Description of any tests conducted and current status of equipment
 - Description of further repairs or troubleshooting necessary
 - Description of any communication with building occupants
10. Click the Save button at the bottom of the pop-up window

Further Work Required Using A Different Task

1. Access the WO List by clicking the number in the Scheduled WOs or My Open DINs box on your Dashboard
2. Select the applicable WO by clicking on the WO number
3. Click the Edit Button in the upper left corner of the WO.
4. Click the Costs tab in the upper left portion of the WO
5. Click the Post Labor Button
6. Enter the hours worked and the date worked.
7. Click the clock icon to enter your name and time stamp the comments, then enter Technician Comments.
8. Technician comments must contain the following elements:
 - Description of the problem found, including location
 - Description of repair or adjustment made
 - Description of any tests conducted and current status of equipment
 - Description of further repairs or troubleshooting necessary
 - Description of any communication with building occupants
9. Change the Status of the task to Finished in Field, enter the hours worked, and the finish date in their respective weeks
10. Click the Save button at the bottom of the pop-up window
11. Select the Identity tab in the upper left section of the WO
12. Click the Add Additional Task link in the Task Information section of the WO
13. Click the button with three dots next to the Task Description field.
14. A drop-down menu will appear in the Task Type Code field. Select the appropriate trade to narrow down the tasks. WO Tasks are categorized into two basic types – Troubleshooting tasks and repair tasks. Repair tasks are categorized by system or building component. Select the appropriate task for the system or building component in need of work.
15. If the additional work is for your shop, click the Work Not Done Box in the Completion section of the added task.
16. Click the Save button at the bottom of the pop-up window.
17. If the additional work is for a different shop, change the status of the WO to Hand Off (to the appropriate shop) and notify your supervisor via radio of the hand off and the reason. If your supervisor is unavailable, notify your Appropriate Administrator or the WO Desk.
18. Click the Save button in the upper left corner of the WO.

ASSOCIATED FORMS	
<i>Name of the Form</i>	

REFERENCE DOCUMENTS	
<i>Document Title</i>	

VERSION HISTORY		
<i>Version</i>	<i>Approved By</i>	<i>Revision Date</i>
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FD&O accepts feedback continuously and conducts reviews when a particular procedure receives substantial feedback and periodic reviews.

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