SJSU SAN JOSÉ STATE UNIVERSITY | Facilities Development & Operations

DOCUMENT TYPE	☐ Administrative Directive ☐ Guideline	■ Operating Procedure ☐ Standard	
DOCUMENT ID/VERSION	MO-003 (1)	EFFECTIVE DATE:	04-16-2025
APPLIES TO	Facilities Development & Operations		
SUBJECT	Supervisor Work Order 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 ensuress consistency, efficiency, and accountability in managing work orders and service requests, while improving communication and support to customers.

Procedures

This procedure is to be completed the first day of the work week to follow up on and further process incomplete work orders. Additional time shall be utilized throughout the week to keep up with new and backlog work orders.

Unfinished Scheduled Past WOs

- Click the bar for a tech in the Unfinished Scheduled Past WOs Graph on your shop's dashboard.
- Look for any work orders with a status related to materials orders.
- Click on the hyperlinked WO Number to open the WO.
- Click the Edit tab in the upper left corner of the work order
- Click the Schedule tab in the upper left corner of the work order
- Click the trash can icon to remove the schedule from the tech.
- Click the Save Button in the upper left corner of the WO
- For other WOs, read the Tech Comments and speak with the Tech to understand why the WO was not completed as scheduled. Reschedule as appropriate.

Further Work Required

These WOs are WOs that have the Work Not Done box checked on one or more tasks. This is meant to communicate to the Supervisor that there is further work required on the WO.

- Click the number in the Further Work Required Box.

- Read comments entered into the WO and speak to the Technician as necessary to understand the work that needs to be done. Verify the Technician entered comments as described in the WO Processing Procedure – Techs.
- Check the Results tab to verify the technician entered parts needed information in the Parts Request / Response field in the Parts Request section of the WO as applicable.
- Check the Multi-Trade Work Order Box if applicable.

<u>Further Work Required Using A Different Task:</u>

- Verify the Technician added an additional task as described in the WO Processing Procedure – Techs.
- Click the Costs tab in the upper left corner of the work order
- Click the Edit tab in the upper left corner of the work order
- Under the Labor section of the Costs tab, click the edit icon of the tasks not used for further work.
- Unclick the Work Not Done Box and fill in the Finish Date and Completion Date fields
- Click the Save button at the bottom of the pop up window
- If the WO is a DIN, change the WO Type to Corrective.
- Schedule as appropriate.

<u>Further Work Required Using The Same Task:</u>

- Click the Costs tab in the upper left corner of the work order
- Click the Edit tab in the upper left corner of the work order
- Under the Labor section of the Costs tab, click the edit icon of the tasks not used for further work.
- Unclick the Work Not Done Box and fill in the Finish Date and Completion Date fields
- Click the Save button at the bottom of the pop up window
- If the WO is a DIN, change the WO Type to Corrective.
- Schedule as appropriate.

<u>Finished WOs</u>

- Click the Finished WOs Box to open a list of finished work orders.
- Verify an appropriate number of labor hours was entered in each WO.
- Open each WO by clicking the hyperlinked WO Number
- If the WO has additional tasks to complete, change the status to Hand Off to the appropriate Trade and save the WO.
- If the WO is complete, change the status to complete and enter a date in the Closed Date Field. Save the WO.

Handed Off WOs

- Click the number in the Handed Off Box.
- Verify there is an appropriate task for the work that needs to be done by your trade.
- Verify the Multi-Trade Work Order Box is checked if applicable.
- Read comments entered into the WO and speak to the handing off Supervisor to understand the work that needs to be done. Schedule the WO as appropriate.

Contracted WOs

- Click the number in the Contracted Box.
- Click the Edit tab in the upper left corner of the work order
- Use the drop down menu in The PO or MEA Field in the Contracted Out section of the WO as appropriate to describe the status of the purchasing mechanism.
- Write the name of the contractor in the Contractor field
- When the PO or WA has been approved, schedule the contractor as you would a Technician. Select Contractor as the Trade Description and the appropriate contractor type as the Technician Name
- Save the WO.

Planning

- Some Supervisors assign WOs to themselves to keep them on their radar. Going forward, change the status of WOs to Planning to investigate and plan these work orders.
- Click the number in the Planning Box.
- Open the WO to determine steps necessary to keep these WOs moving forward. Implement these steps.

Open DINs

- Click the number in the Open DINs Box.
- Check the Request Dates on the list of WOs and follow up with any WOs with the DIN tasks not finished within three days of the request date.

Estimates Requested

- Click on the Requested bar in the Estimates Requested section of the Dashboard.
- Open the WO for which the estimate is requested. Read the request, walk the job, and gather other information as necessary to develop an estimate.
- Click the Estimate link in the Action Menu
- Fill in the Estimator Name field.
- Click the Add Item link
- Fill in the Trade, Cost Type, Quantity, and Unit Cost fields. Repeat as necessary by using the Save and Add button to include labor, material, miscellaneous, and other costs. Click the Save button when complete.
- Click the Save button on the estimate.
- Return to the WO and click the Edit tab in the upper left corner of the work order.
- Change the Status to Estimate Pending Approval and save the WO.
- Estimates should be developed within 10 business days of the request.
- Click on the Pending Approval bar in the Estimates Requested section of the Dashboard.
- Estimates should be approved or denied within 10 business days of posting.
- When Estimates are approved, change the status to Estimate Approved and prepare to schedule.

ASSOCIATED FORMS	
Name of the Form	

REFERENCE DOCUMENTS	
Document Title	

VERSION HISTORY		
Version	***Approved By***	***Revision Date***
(1) Original		N/A

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FD&O is committed to continuous improvement and providing facilities, development & operations services to the campus. Every Administrative Directive, Standard Operating Procedure, Guideline, and Standard accepts feedback from customers, FD&O employees, and leadership to facilitate continuous improvement.

FD&O accepts feedback continuously and conducts reviews when a particular procedure receives substantial feedback and periodic reviews.

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