SJSU SAN JOSÉ STATE UNIVERSITY | Facilities Development & Operations

DOCUMENT TYPE	☐ Administrative Directive	☒ Operating Procedure
	☐ Guideline	☐ Standard

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APPLIES TO	Facilities Development & Operations

SUBJECT	Supervisor Work Order Scheduling 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 communication and support to customers.

Procedure

1. Scheduling for the following week is to be completed prior to the last day of the current work week.

2. Schedule work orders by using the Unscheduled WOs by Priority Graph in the upper left corner of the Shop Dashboard.

3. Start from the left and schedule all Priority 01 Non-PMs.

4. Click on the bar to open up a list of WOs of that priority. The work orders are listed in order from oldest to newest.

5. Click on the first WO number listed to open the oldest WO on the list to schedule.

6. Click the Edit tab in the upper left corner of the work order.

7. Click the Schedule tab in the upper left corner of the work order.

8. Click the Add Schedule Link.

9. In the pop up window select which task you wish to schedule. If more than one task is on the WO, each task must be scheduled for the WO to be fully scheduled.

10. Select the Technician Name and trade code

11. You can select the trade code and click the magnifying glass icon to narrow down the list of names to your trade.

12. Select the date to schedule the WO using the calendar icon

13. If you wish to schedule the same WO task to the same person for multiple days (repeating PMs), click the Save & Clone button and change the date.

14. Click the Save button in the pop up window.

15. Click the Identity tab at the upper left corner of the WO

16. Change the status of the WO to Scheduled

17. Click the Save Button in the upper left corner of the WO

- Repeat the process until every work order in the Priority 01 Non-PM category is scheduled

- Repeat the process for work orders in the Priority 01 PM category

- Repeat the process for work orders in the Priority 02 Non-PM category

- Repeat the process for work orders in the Priority 02 PM category

- Repeat the process for work orders in the Priority 03 category

18. Before moving to the Priority 04 categories, click the bar labeled Received in the Materials Status Control. Schedule those WOs from top to bottom as described above

19. If the week is not fully scheduled for all technicians repeat the process for work orders in the Priority 03 categories

Note – Schedule WOs for each tech for each day. Do not schedule for the week by scheduling all work orders on the same day or put WOs in tech's backlogs.

ASSOCIATED FORMS	
Name of the Form	

REFERENCE DOCUMENTS	
Document Title	

VERSION HISTORY		
Version	*Approved By*	*Revision Date*
(1) Original	Jim Kari, Sr. Director Maint & Ops	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.