



MAINTENANCE
DIRECT™

MaintenanceDirect User Manual

Requester Guidelines

Version 2.0

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Requester

I. So You're a Requester! Now What?

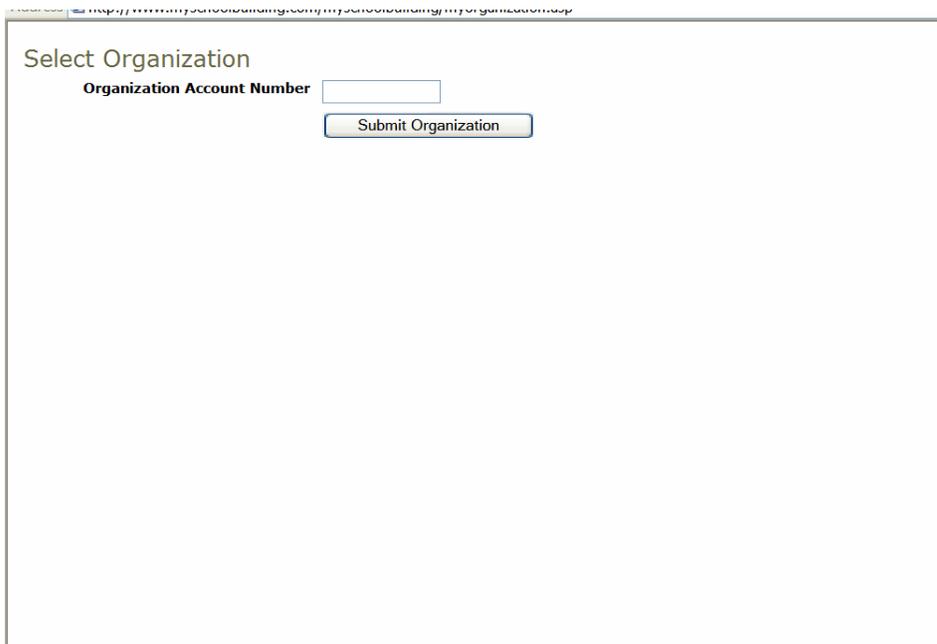
(Getting started with MySchoolBuilding.com.)

MySchoolbuilding.com is where you as a Requester will go to make all of your new work order requests. There are two ways that a Requester can be entered into the system:

- The MaintenanceDirect Administrator can add the Requester into the system.
- The Requester can add themselves into the system.

If you are a new Requester (you haven't been entered into the system before), follow these steps to set up your Requester name and enter yourself into the system:

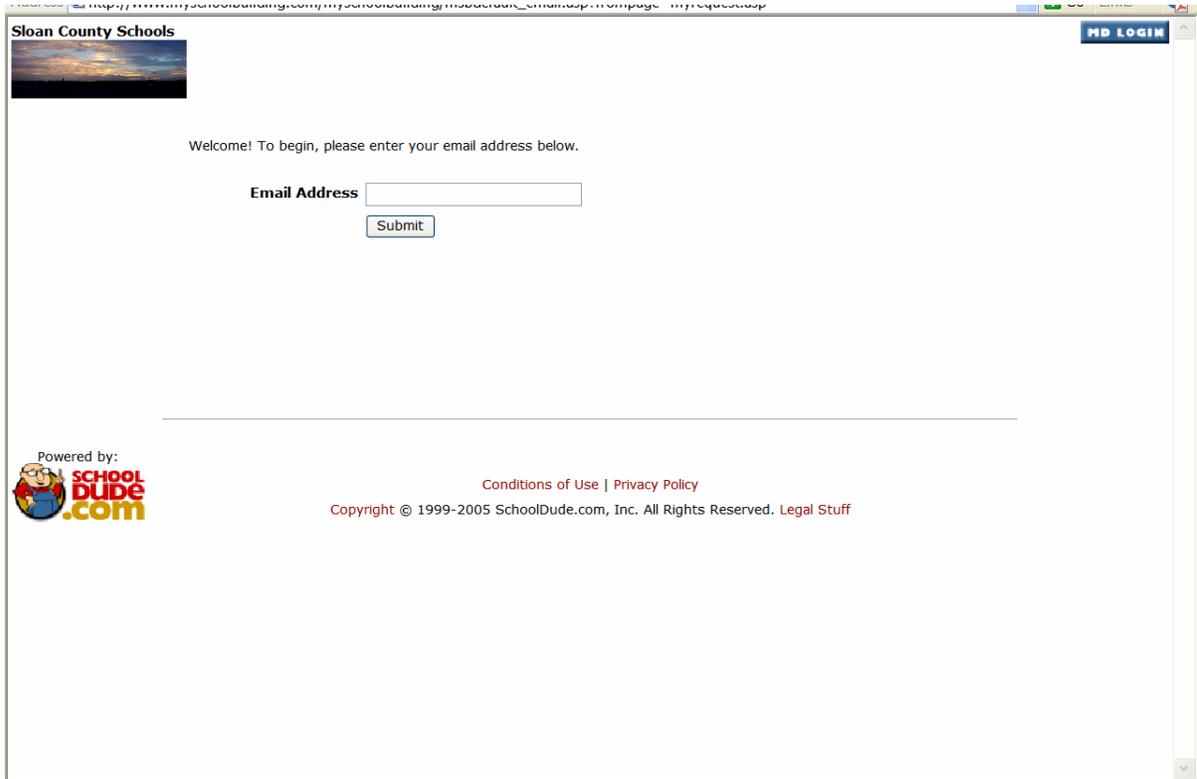
1. Go to www.myschoolbuilding.com.
2. You will see the following page:



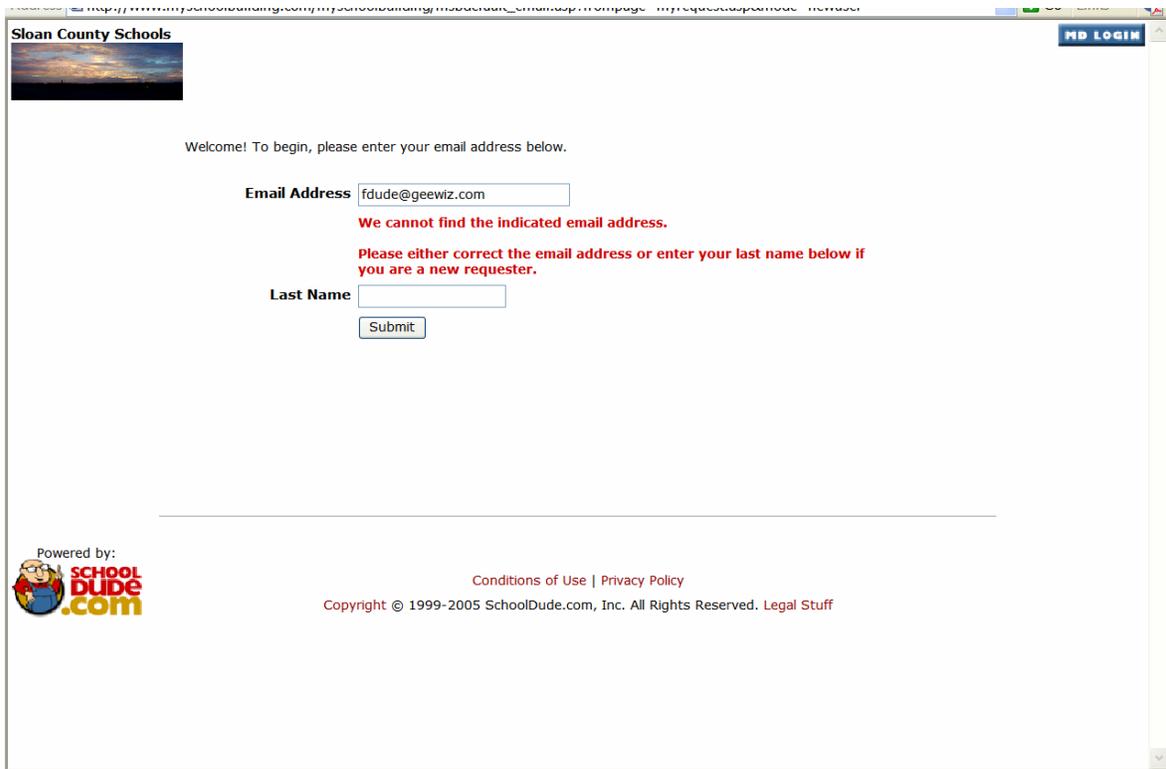
The screenshot shows a web browser window with the URL <http://www.myschoolbuilding.com/mySchoolBuilding/myOrganization.asp>. The page content includes the heading "Select Organization" and a form with the label "Organization Account Number" and an empty text input field. Below the input field is a button labeled "Submit Organization".

3. Enter your **organization account number** in the space provided (your Administrator can give it to you).
4. Click **Submit Organization**.

5. Next, you will be taken to the MySchoolBuilding.com login page for your educational facility. You will see your facility's name and/or logo in the top left-hand corner and the words "MD Login" in the top right. See below:



6. Enter your **email address** in the space provided.
7. Click **Submit**.
8. As you are a new Requester, you will then see the following page:



SCHOOLDUDE SAYS: If this page doesn't come up when you enter your email address and you see an entirely different page with the word "Welcome" at the top, followed by a form with some of your info already in it, skip ahead to step 17.

9. Enter your **last name** into the box provided.
10. Click **Submit**.
11. Next, you should see the page below:

Sloan County Schools

Welcome! To begin, please enter your email address below.

Email Address

Please select your name from the below list or select the "not listed" option.

<input type="radio"/>	Ed Dude	edude@geewiz.com
<input type="radio"/>	Jane Dude	jdude@geewiz.com
<input type="radio"/>	Sam Dude	sdude@geewiz.com
<input type="radio"/>	Will Dude	wdude@geewiz.com
<input checked="" type="radio"/>	My name is not listed	

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12. Your email address should already be entered into the box provided. If it's not correct, however, enter it correctly. Make sure that the circle next to "My name is not listed" has been clicked and contains a green dot.
13. Click **Submit**.

14. The page you see next should look something like this:

Sloan County Schools

Indicates required information.

First Name

Last Name
Dude

Email Address
fdude@geewiz.com

Phone Number

Pager

Cellular Phone

Note: This information will be saved after you submit your first request. New users are not saved until their first request has been submitted.

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15. Your last name and email address should already be filled in. Fill in the remaining fields (first name is the only one required) if you wish.

16. Click **Submit**.

II. You Are Here: The Work Order Request Page.

Once you've visited www.myschoolbuilding.com and logged in using your email address, you will be taken directly to the work order request page. This serves as your Home page for MySchoolBuilding.com and should look something like this:

Welcome
To submit your request complete the following form.

Indicates required information.

Step 1 Please be yourself, click here if you are not Fred Dude

First Name Fred **Last Name** Dude **Email** fdude@geewiz.com
Phone 919-555-4678 **Pager** **Cellular Phone**

Step 2 Location

-- Select Location --
Area -- Select Area -- **Area/Room Number**
 Yes, remember my area entries for my next new request entry.

Step 3 Select Problem Type:

Maintenance Help Desk:
Click [here](#) for Maintenance Emergency Contacts
Click on the problem type below that best describes your issue.

Athletic Fields Audio/Visual Cafeteria Carpentry
 Climate Control Custodial Electrical Food Services
 Heating/Ventilation /Air Conditioning Lighting Office Supplies Plumbing
 Windows

Maintenance Emergency
 Check here if this is an emergency or call any of the emergency contacts below.

Contact Name	Contact Phone
No contacts listed.	

Step 4 Please describe your problem or request.

Step 5 Requested Completion Date

(A valid date is required. Text is not accepted, but you may leave it blank. Click [here](#) for assistance in date entry.)

Step 6 Submittal Password
..... [Forgot Password?](#)

Step 7

Across the top of the page, you'll notice five tabs labeled "Maint Request", "Trip Request" (if you have TripDirect), "My Requests", "Settings", and "Help". These tabs are how you navigate to the information that you need. In the following sections, we'll show you around MySchoolBuilding.com and each tab will be explained. You'll see what they contain and how to use them. (We'll get into the actual work order request a little further along.)

III. The Settings Page: Your Information in a Nutshell.

Before we get started in a bit with making work order requests, let's take a moment to check out the **Settings** page, which contains your information as entered by the Administrator during the Account Setup process. If you set up your own account, this page will show the information you entered earlier. Use this page to edit your information.

The **Settings** page looks like this:

The screenshot shows the 'My Settings' page for a user named Fred Dude. The page includes a header for 'Sloan County Schools' with navigation links for 'Maint Request', 'Trip Request', 'My Requests', 'Settings', and 'Help'. The main content area is titled 'My Settings' and contains the following information:

- Indicates required information.** (checked)
- First Name:** Fred
- Last Name:** Dude
- Email Address:** fdude@geewiz.com
- Phone Number:** 919-555-4678
- Pager:** (empty)
- Cellular Phone:** (empty)
- Use these generic email notification settings.** (selected)
- Send Requester Work Request Receipt Notification? [Sample](#)
- Notify Requester of Work Request Assignment? [Sample](#)
- Notify Requester of Work Request Change in Status? e.g. On-hold, Void, Duplicate Request, Waiting Parts, etc. [Sample](#)
- Notify Requester of Work Request Completion? [Sample](#)
- Fred Dude prefers these email notification settings.** (selected)
- Send Requester Work Request Receipt Notification? [Sample](#)
- Notify Requester of Work Request Assignment? [Sample](#)
- Notify Requester of Work Request Change in Status? e.g. On-hold, Void, Duplicate Request, Waiting Parts, etc. [Sample](#)
- Notify Requester of Work Request Completion? [Sample](#)
- Password:** (empty)
- Submit** button

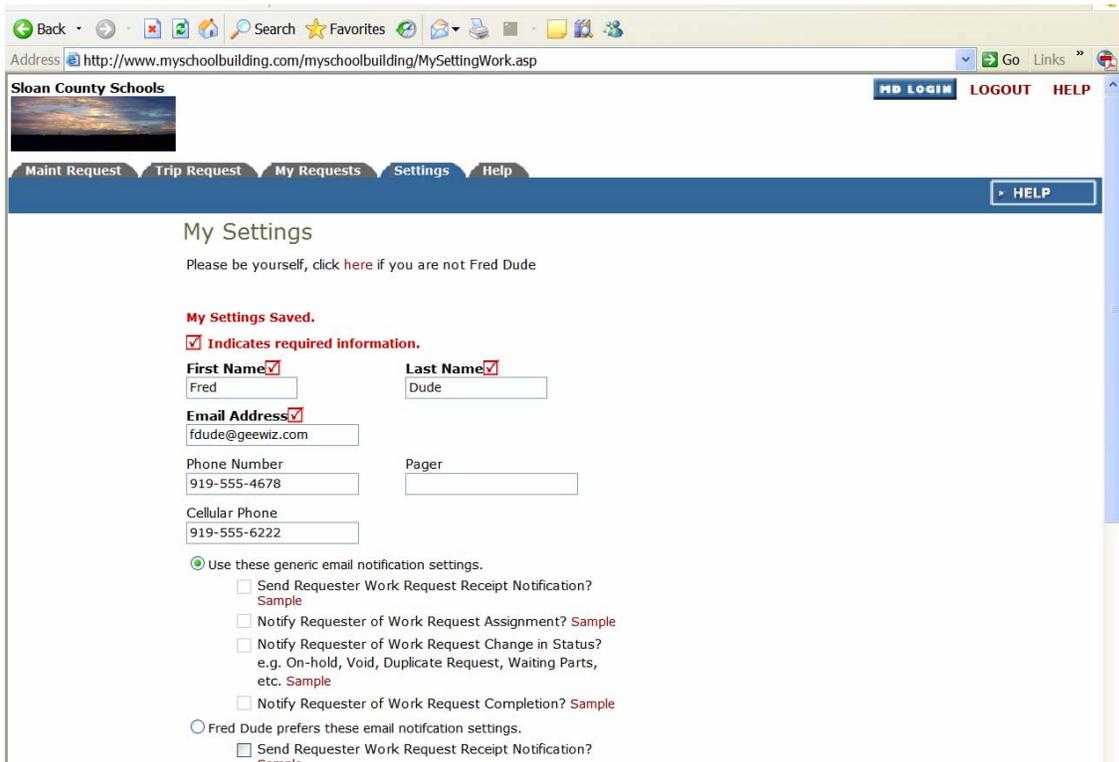
At the bottom of the page, there is a 'Powered by: SCHOOL DUDE' logo and a navigation bar with links for 'Maint Request', 'Trip Request', 'My Requests', 'My Settings', and 'Help'. There are also links for 'Conditions of Use', 'Privacy Policy', and 'Help'.

- Make any changes you wish to make, enter your password at the bottom, and click **Submit**.

OR

- To continue without making any changes, simply click the **Back** button at the top of your page or click the Tab of the page you wish to go to next.

If you have made changes, the page will refresh to bring up the same screen only now, the words “My Setting Saved” will appear in red at the top of the page (see below). Proceed by clicking the Tab of the page you’d like to go to next, up near the top of the screen.



IV. Maintenance Request: MD in Action

Now that you've logged in and checked out your settings page to make sure that all of your information is correct, we'll move on to what you're really here for: making work order requests.

First, let's look at **Work Order Statuses**:

1. **New Request**: All work orders initially are set to new request. Generally, "new request" means they have not been assigned to someone for the work to be completed.
2. **Work in Progress**: Any work order assigned or scheduled to be completed would be considered as work in progress.
3. **Complete**: A complete status signifies that all the actual work has been done. All purchases and labor transactions may not be entered into the system. This will alert requesters that the work has been done.
4. **Closed Work Order**: Once all transactions and notes are added to a work order, you would close it. Once a work order is closed, you cannot add any more transactions (you would have to change the status back to "complete" to add more transactions).
5. **Declined**: The declined status defines any work orders that will not be done. They may be declined by a principal (if site administrator approval routing is set up) or by a person in the maintenance department.
6. **Parts on Order**: This defines any work order waiting for parts before continuing.
7. **Duplicate Request**: Any work order entered twice or previously requested.
8. **Void**: Voided work orders are work orders you would like to remove and will not show up in any reports unless specifically requested. You CAN'T delete a work order. Instead, you would void them out of the system.
9. **On Hold**: Work placed on hold for any reason besides waiting on parts would have this status.
10. **Waiting for Information**: If you were waiting for more information from the requester or another person, you would want to set this as the status.
11. **Open Extended**: Any work order kept open for an extended amount of time. This can be used to keep track of labor hours for a general task done daily.
12. **Pending**: All PreventiveMaintenance work orders (if your educational facility owns PMDirect) will initially have a status of "pending".

➤ *Now that we've got Statuses out of the way, let's move on to the actual work order request, shall we?*

Requesting Work:

The **Maint Request** page (reached by clicking the tab near the top of the page from wherever you are in MySchoolBuilding.com) displays the form you'll fill out each time you want to request that work be done. Those fields marked with a red check-mark in a box () are required and can't be skipped. The rest, you should just fill in as you are able to make the work request as detailed and helpful to those processing it as possible (this can speed the process up a bit).

Here again is a view of the work order request page:

Sloan County Schools

MD LOGIN LOGOUT HELP

Maint Request Trip Request My Requests Settings Help

WELCOME

To submit your request complete the following form.

Indicates required information.

Step 1 Please be yourself, click here if you are not Fred Dude

First Name Fred Last Name Dude Email fdude@geewiz.com

Phone 919-555-4678 Pager Cellular Phone 919-555-6222

Step 2 Location

-- Select Location --

Area -- Select Area -- Area/Room Number

Yes, remember my area entries for my next new request entry.

Step 3 Select Problem Type:

Maintenance Help Desk:
Click here for Maintenance Emergency Contacts
Click on the problem type below that best describes your issue.

Athletic Fields Audio/Visual Cafeteria Carpentry
Climate Control Custodial Electrical Food Services
Heating/Ventilation /Air Conditioning Lighting Office Supplies Plumbing

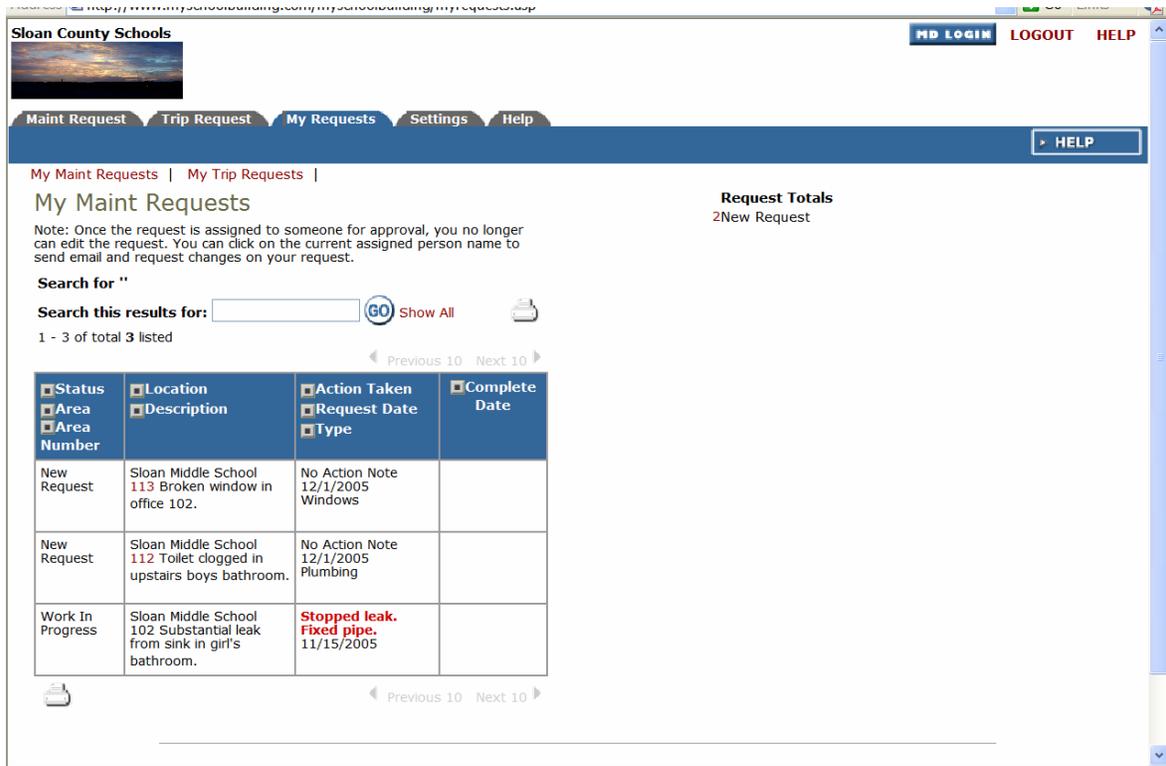
Follow these steps to fill out the form (It'll only take a minute or two!):

- Enter your **Location**, Building, Area, and Area Number.
- Select the **Problem Type** that best describes your issue. For example, if a toilet is leaking, that would be a plumbing issue. Once you click on a problem type, the page will refresh and your problem type will be highlighted with a red circle. If this is an emergency, check the Maintenance Emergency box below the problem types list.
- **Describe** your problem or request.

- Enter the **Requested Completion Date**. Click the calendar icon next to the date field to choose a date from the calendar.
 - Enter your **submittal password**. This password will be the same for all Requesters.
 - Click **Submit**.
- You will then be taken to the **My Maint Requests** page, which will show listed among other requests, the new work request you just made. We will cover this page in more detail in the next section.

V. My Requests: Keeping Track of Your Requests.

The My Requests page allows gives you a look at all the work requests you've made in MaintenanceDirect. You can reach the My Requests page by clicking on the tab at the top of the Home page. It should look something like this, depending on how many requests you've submitted:



The screenshot shows the 'My Requests' page for Sloan County Schools. The page has a navigation bar with tabs for 'Maint Request', 'Trip Request', 'My Requests', 'Settings', and 'Help'. Below the navigation bar, there are links for 'My Maint Requests' and 'My Trip Requests'. A 'Request Totals' section shows '2 New Request'. A search field is present with a 'GO' button and a 'Show All' link. Below the search field, there is a table of requests.

Status	Location	Action Taken	Complete Date
New Request	Sloan Middle School 113 Broken window in office 102.	No Action Note 12/1/2005 Windows	
New Request	Sloan Middle School 112 Toilet clogged in upstairs boys bathroom.	No Action Note 12/1/2005 Plumbing	
Work In Progress	Sloan Middle School 102 Substantial leak from sink in girl's bathroom.	Stopped leak. Fixed pipe. 11/15/2005	

- Each request you make will be added to this list, where you can check its current status, who it's been routed to, the date you submitted it, and any Action notes that have been made.
- You can print your requests using the Print icon near the bottom left-hand corner of the page:

- To search your requests, enter a key term in the Search field, located just above your request list, then click **Go**. To show all requests (after searching for work orders), click the **Show All** link.
- To view only requests of a certain status, click the number next to the status under the "Request Totals" section (near the top, right-hand corner).