T1: SUBMIT A MATERIAL REQUISITION - TRADESPERSON (EZMaxMobile)

PURPOSE:

Commonly used by a tradesperson to request and order materials for a particular work order.

STEPS NEEDED:

1. **Log into EZMaxMobile**

Note: If you are not using the campus internet service (EduRoam), please make sure you are logged into and running the VPN using the CISCO AnyConnect Application. For more information, please review SOP E3: EZMaxMobile Install and Setup on an iOS Device.

   a. Tap the EZMaxMobile app on your mobile device to open it
   b. Log into EZMaxMobile using your NetID and Cornell password
   c. The first screen displayed is your *Start Center*

2. **Open the work order that you want to submit a material requisition for**
   a. If the work order is assigned to you, tap "Work Orders Assigned to Me"
   b. Identify the work order in the list that you would like to view
      i. To search for a particular work order #, use the **Quick Search** field (Quick Search *only* searches work order #'s)
      ii. To find a work order that you are not assigned to, see SOP T6
   c. Tap on a work order to open it in *Work Order Tracking*
   d. Details about the work order will be displayed

3. **Create a new material requisition**
   a. On the *Work Order Tracking* screen, tap the "Create Requisition" button
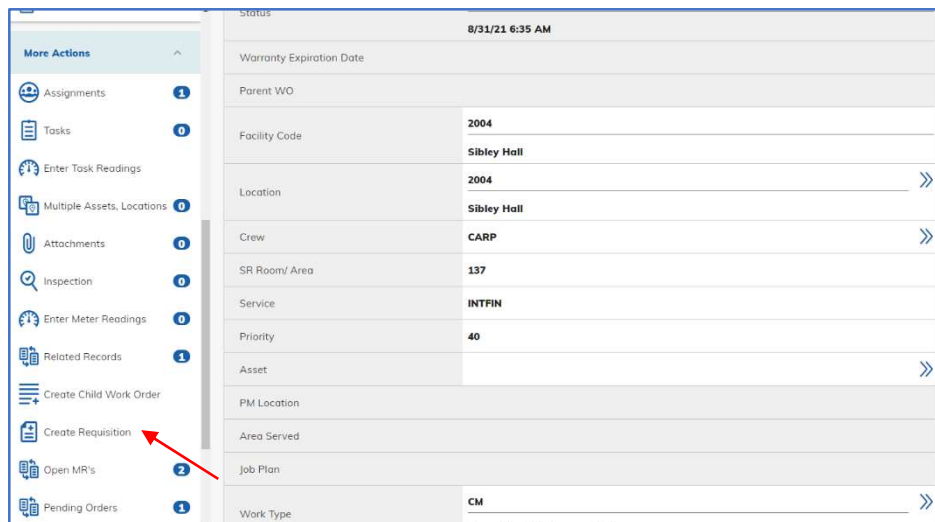
  b. The *Create Requisition* screen will be displayed
    i. A requisition number will be created in "SAVED" status
    ii. The **Work Order #**, **Location #**, and **Work Order Description** will populate
    iii. You can edit the **Work Order Description** if more information should be included for the FM Procurement Group
  c. If the materials need to be expedited, enter the date in the **Required Date** field, or use the calendar icon to select the date (this does not necessarily mean you will get them by that date)
  d. Click the "Next" button at the bottom of the screen

4. **Are you ordering "Materials" or "Services"?**
  a. To order materials, follow steps 5 – 8
  b. To order services, skip to step 9

5. **If the work order is written to an asset, there is a possibility that spare parts are associated to it. To select asset spare parts, do the following:**
  Tip: If not applicable, go to Task 6.
  a. Tap on the "Select Asset Spare Parts" button. A resulting list will be displayed in the lower section if there are spare parts associated to the asset
    i. If what you need is not on the list, click cancel, then follow instructions in Task 6
  b. Select the spare parts needed for ordering by tapping in the blue checkbox box to the right of the description
    i. Tap the checkmark ☑ icon in the upper right corner to add the line(s) to the order
  c. Adjust quantities as needed by tapping on the line description and either use the +/- sign, or typing in the quantity and order unit and then tapping the checkmark in the top right
 d. If your requisition is complete, skip to Task 8. Otherwise, continue to Task 6

6. **To add either an "Item" or "Material" that is not listed as an asset spare part, do the following, then do step 7 or 8:**
  a. Tap the "New Requisition Item" button to open the *Requisition Items* screen
 b. The *Requisition Items* screen will be displayed

7. If the order is for an "Item" listed in Maximo, do the following:

Tip: If not applicable, go to Task 8.

    a. The **Line Type** is already selected for item

    b. To the right of the **Item** line, tap the [»] icon

    c. To filter items, tap the **Filter** button

       i. Type words in the **Description** field related to what you are searching for

       ii. Tap the "Apply" button

       iii. A list of items will appear

       iv. Use the arrows at the top of the screen to scroll through the list
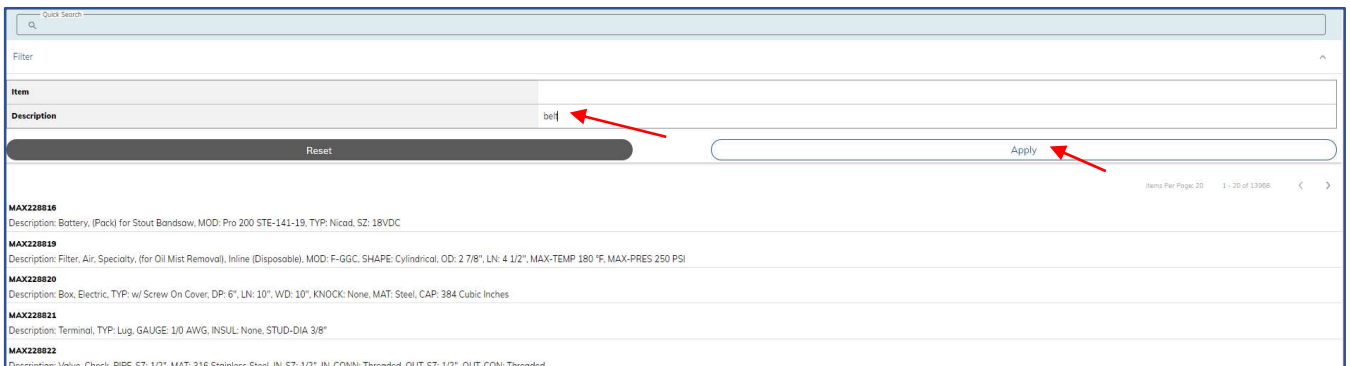
    d. Tap on the item you would like to place an order for

    e. The information for the item will then populate on the *Requisition Items* screen:
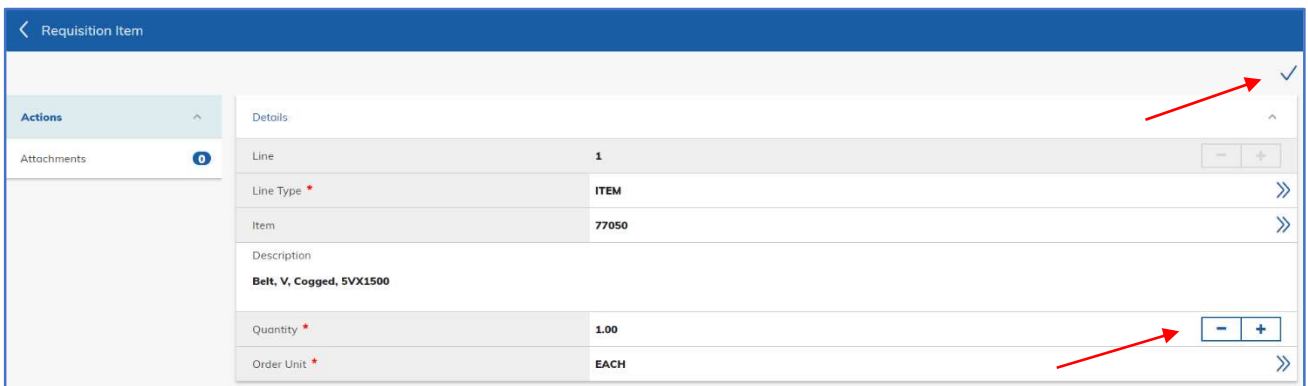
    f. If you need to change the quantity, use the -/+ buttons

    g. Type or select the **Order Unit** (typically, "EACH")

    h. Verify the information displayed is correct

    i. Tap the checkmark on the top right of the screen and it will bring you back to the *Create Requisition* screen where you can add more lines or move on in the process by clicking "Next"

    j. If your requisition is complete, skip to Task 10. Otherwise, repeat step 7 or continue to Task 8

8. If the order is for a "Material" that is not listed in the Maximo item list, do the following:

    a. If continuing from previous line item, tap the "New Requisition Item" button

    b. Tap the [»] icon to the right of the **Line Type** line

       i. Tap "Material"

    c.   In the **Description** field, type a description of the materials you are requesting

    d.   Edit the **Quantity** by using the -/+ buttons

    e.   Type or select the **Order Unit** (typically, "EACH")

    f.   Verify the information displayed is correct

    g.   Tap the checkmark in upper right corner

    h.   If your requisition is complete, skip to Task 10. Otherwise, repeat step 7 or continue to Task 8

9. **If the order is for a "Service", do the following:**

    a.   If continuing from previous line item, tap the "New Requisition Item" button

    b.   The *Requisition Items* screen will be displayed

    c.   Tap the ⟫ icon to the right of the **Line Type** line

          i.   Tap "Service"

    d.   In the **Description** field, type a description of the service you are requesting

    e.   Edit the quantity by using the -/+ buttons

    f.   Type or select the **Order Unit** (typically, "EACH")

    g.   Verify the information displayed is correct

    h.   You will then see the **Line item** information populated at the bottom of the *Create Requisition* screen

10. **To attach a photo to a line item or material, tap on the "Attachments" button of that line**
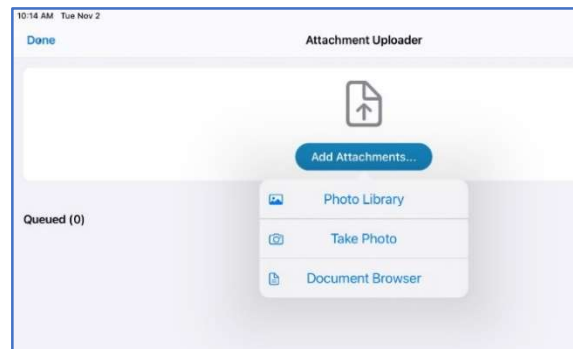

Once you attach a photo, you *will not* be able to edit the description, so make sure your description includes everything you need. Also, if Quantity and Order Unit are not entered first, you will not be able to attach a photo.

i. Tap on the camera icon on the upper right

ii. Then, you will be prompted to select a folder, click "OK"
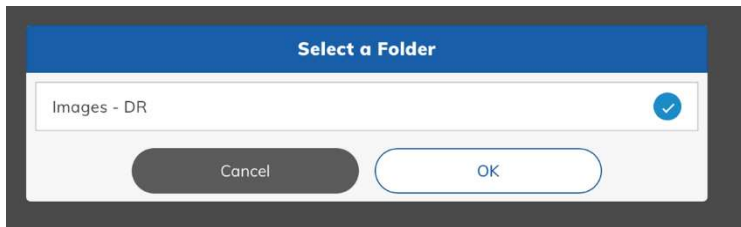
iii. Then click on "Add Attachments"

iv. Choose "Photo Library" to use a saved photo, "Take Photo", or "Document Browser", as appropriate, and follow prompts

v. Once you've completed adding your attachments, tap "Upload" in the top right corner to attach photo(s) or document(s) to this specific material requisition line. Multiple photos can be attached by repeating the process. You should see "Upload Successful" after uploading

vi. Click "OK". Click "Done" in the upper left-hand corner

vii. Tap on the "Back" arrow icon to return to the material requisition line

viii. The number of attachments will be displayed next to "Attachments"

ix. Click "Back" arrow icon once more to return to the material requisition

10. Submit requisition (or save for later)

a. Tap the "Save For Later" button if you are going to modify this record in any way later, and it isn't ready to be submitted to FM Procurement

b. Tap on "Submit" to send the requisition to FM Procurement. **Note**: Modifications can no longer be made to the requisition after it has been submitted (other than adding a photo)

c. When the requisition is submitted, a green confirmation bar will appear at the top of the screen

d. The status of the MR will change to "DRAFT"

e. Tap the "Go To" icon , then tap "Start Center" to return to your *Start Center*

11. To view requisitions that you "saved for later"

a. Tap the "Go To" icon , then tap "View Requisitions"

b. Tap "View Saved Requisitions"

        i. Tap on the requisition description to open it
       ii. Tap on the "Edit Requisition" button and you will be back where you left off

  c. To submit the requisition, tap the "Submit" button

RESULT:

A request for materials or services ("Material Requisition") for a Work Order will have been submitted to the FM Procurement Group. FM Procurement will have received the requisition in DRAFT status, where they can proceed with processing the request.