
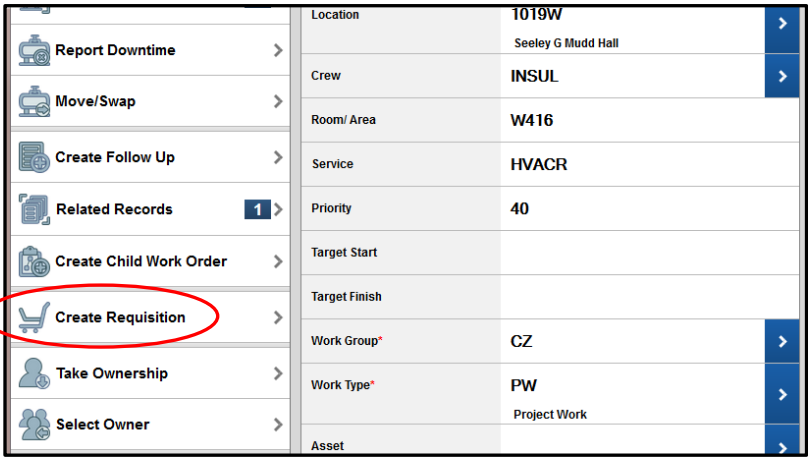
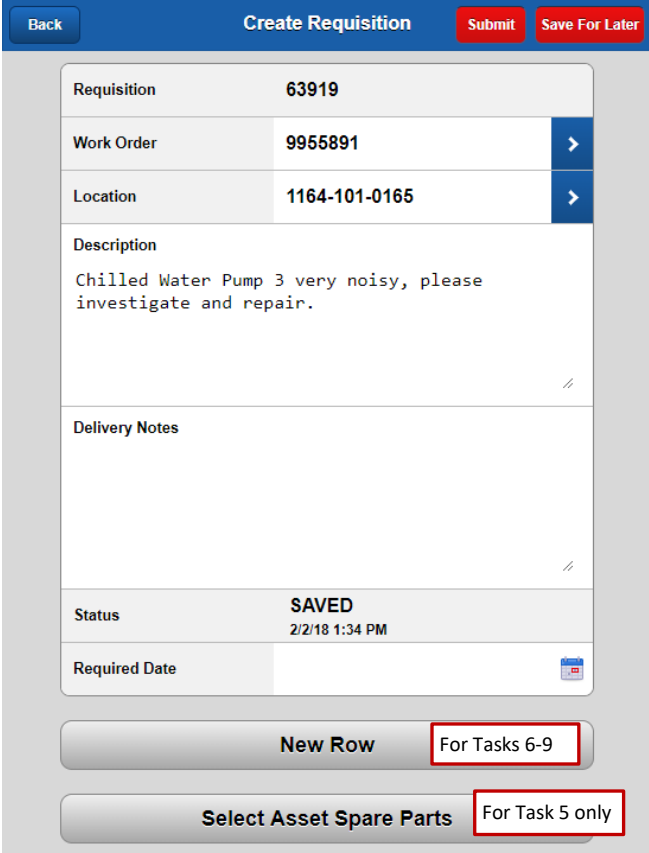
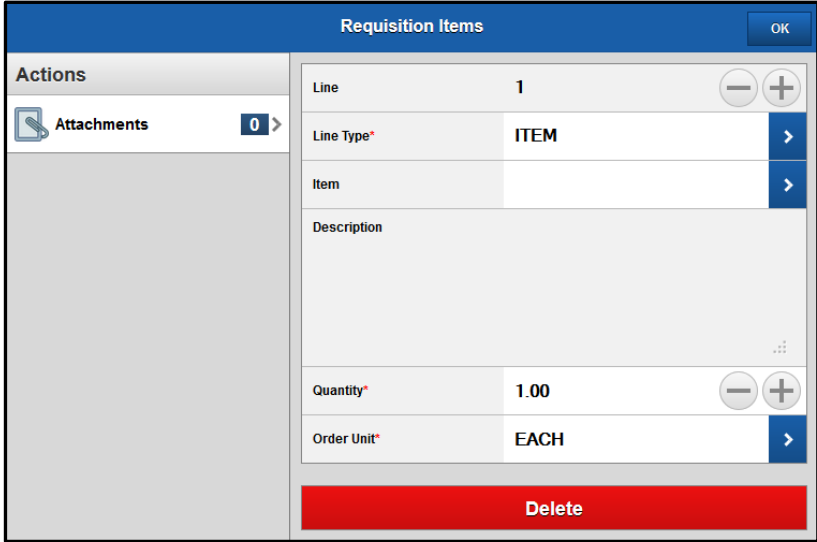
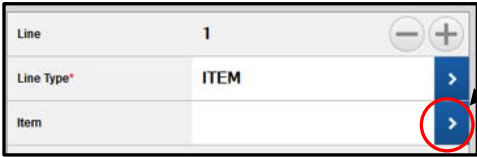
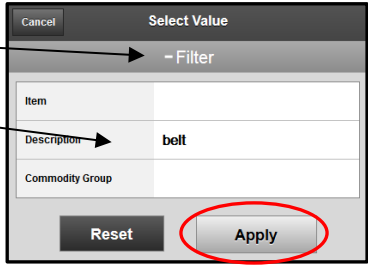
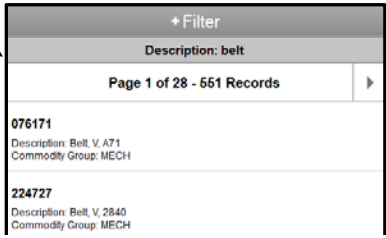


Submit a Material Requisition - Tradesperson (EZMaxMobile)

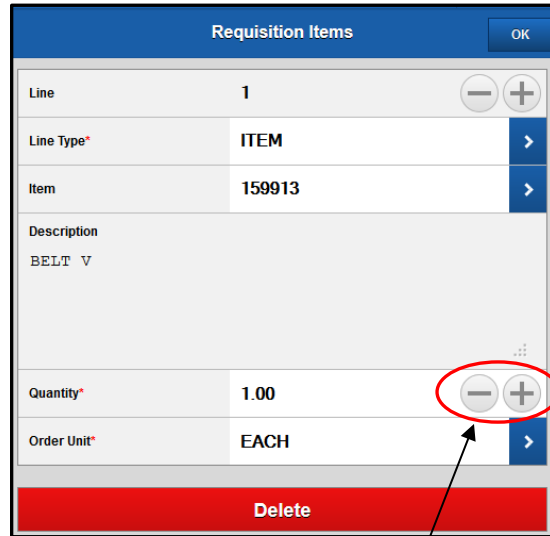
Purpose:	To request an order of materials for a particular work order	
When:	Materials are needed to complete the work on a work order	
Who:	Tradesperson	
Resources to Complete Tasks		
A mobile device with the EZMaxMobile app installed (SOP E3)	A Maximo account	
	An EZMaxMobile license	
Perform These Tasks:	Do These Steps / Notes:	
<p>1. Log into EZMaxMobile</p> 	<p>a. Tap the EZMaxMobile app on your mobile device to open it</p> <p>b. Log into EZMaxMobile</p> <ul style="list-style-type: none"> • Username: Your NetID • Password: Your Cornell (Kronos) password • Tip: Turn on the switch next to “Remember Me?” so that you don’t have to type in your username & password every time <p>c. The first screen displayed is your <u>Start Center</u></p>	
<p>2. Open the work order that you want to submit a material request for</p>	<p>a. If the work order is assigned to you, tap “Work Orders Assigned To Me”</p> <p>b. Identify the work order in the list that you would like to view</p> <ul style="list-style-type: none"> • To search for a particular work order #, use the “Quick Search” field (Quick Search <i>only</i> searches work order #s) • To find a work order that you are not assigned to, see SOP T6. <p>c. Tap on a work order to open it in <u>Work Order Tracking</u></p> <p>d. Details about the work order will be displayed</p>	
<p>3. Create a new Material Requisition</p>	<p>a. On the <u>Work Order Tracking</u> screen, tap the “Create Requisition” button</p> 	

<p>(Task 3 continued)</p>	<p>b. The <u>Create Requisition</u> screen will be displayed</p> <ul style="list-style-type: none"> • A Requisition number will be created in “SAVED” status • The Work Order #, Location #, and Work Order description will populate • You can edit the work order description if more information should be included for the FM Procurement Group • Use the “Delivery Notes” field to add any notes to be displayed on the package label when the package is received. <p>c. If the materials need to be expedited, enter the date in the “<u>Required Date</u>” field, or use the calendar icon to select the date (this does not necessarily mean you will get them by that date)</p> 
<p>4. Are you ordering materials or services?</p>	<p>a. To order materials, follow steps 5 – 8. b. To order services, skip to step 9.</p>
<p>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: (If not applicable, go to Task 6)</p>	<p>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</p> <ul style="list-style-type: none"> • If what you need is not in the list, click cancel, then follow instructions in Task 5) <p>b. Select the spare parts needed for ordering by tapping in the blue checkbox box to the right of the description</p> <ul style="list-style-type: none"> • Tap “OK” in the upper right corner to return the line(s) to the order

<p><i>To select asset spare parts continued...</i></p>	<p>c. Adjust quantities as needed by tapping on the line description and either using the +/- sign, or typing in the quantity and order unit and tapping "OK" in the top right</p> <p>d. If your requisition is complete, skip to Task 8. Otherwise, continue to Task 5.</p>
<p>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:</p>	<p>a. Tap the "New Row" button to open the <u>Requisition Items</u> screen (see Task 3 Step c. screen shot)</p> <p>b. The <u>Requisition Items</u> screen will be displayed (see below)</p> 
<p>7. If the order is for an "Item" listed in Maximo, do the following:</p> <p>(if not applicable, go to Task 8)</p>	<p>a. The "Line Type" is already selected for "Item"</p> <p>b. To the right of the "Item" line, tap the blue arrow</p>  <p>c. To filter items, tap the "Filter" button</p> <ul style="list-style-type: none"> Type words in the Description field related to what you are searching for Tap the "Apply" button  <ul style="list-style-type: none"> A list of items will appear Use the arrows at the top of the screen to scroll through the list  <p>d. Tap on the item you would like to place an order for</p>

To order an "Item" listed in Maximo continued...

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. Verify the information displayed is correct.

h. Tap the "OK" button on the top right of the screen

- You will then see the Line item information populated at the bottom of the Create Requisition screen

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

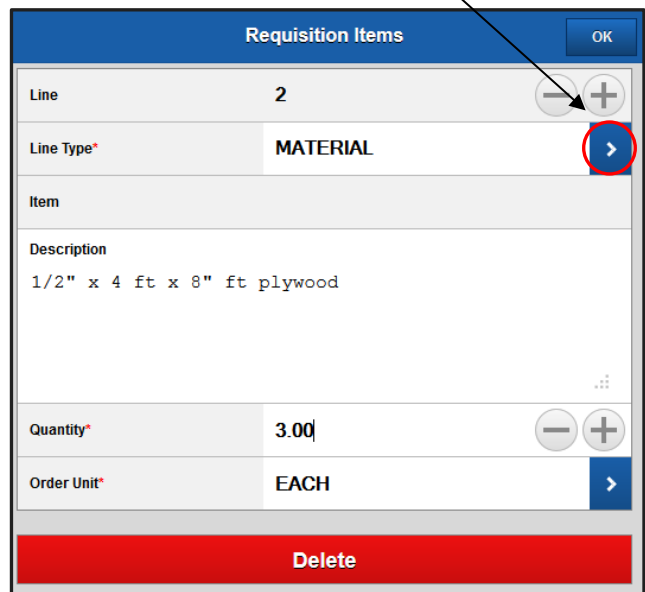
8. If the order is for a "Material" that is not listed in the Maximo item list, do the following

(If not applicable, go to Task 9)

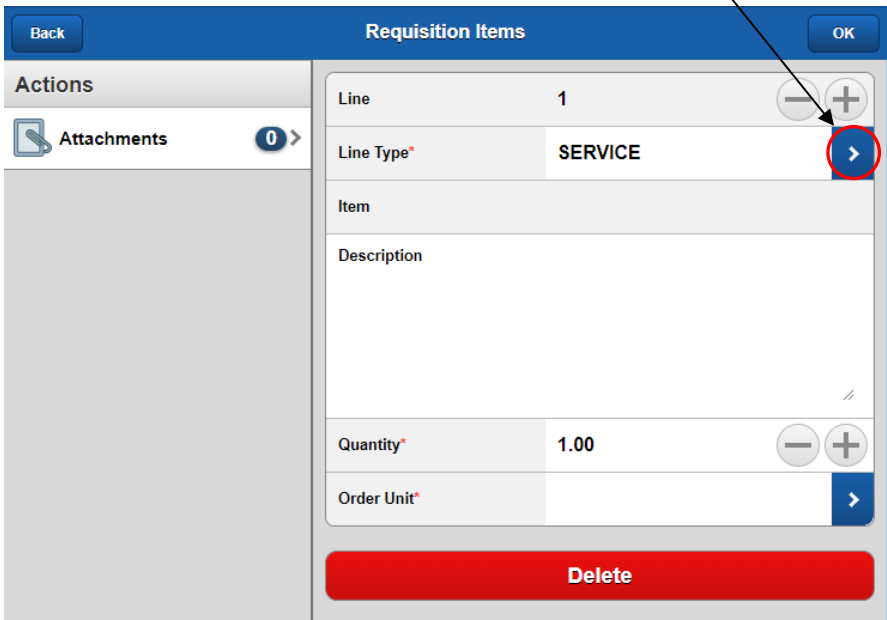
a. If continuing from previous line item, tap the "New Row" button

b. Tap the blue arrow to the right of the "Line Type" line

- Tap "Material"



(Refer to screen shot above for steps on the following page)

<p>To order a “Material” not listed in the item list continued...</p>	<p>c. In the “Description” field, type a description of the materials you are requesting</p> <p>d. Edit the Quantity by using the − + buttons</p> <p>e. Type or select the “Order Unit” (typically, “EACH”)</p> <p>f. Verify the information displayed is correct.</p> <p>g. To attach a photo, tap on the “Attachments” banner. Note: Quantity and Order Unit must be entered before you can attach a photo. Once you attach a photo you will not be able to edit the description, so make sure your description includes everything you need.</p> <ul style="list-style-type: none"> • Tap on the camera on the upper right • Tap either “Take Photo” or “Choose Existing” as appropriate and follow prompts • Tap “Upload” in the top right corner to attach photo to this specific material requisition line. Multiple photos can be attached by repeating the process. • Tap on the “Back” button to return to the material requisition line. • The number of attachments will be displayed <p>h. Tap the “OK” button on the top right of the screen</p> <ul style="list-style-type: none"> • You will then see the Line item information populated at the bottom of the Create Requisition screen
<p>9. If the order is for a “Service”, do the following</p>	<p>a. Tap the “New Row” button to open the Requisition Items screen (see Task 3 screen shot)</p> <p>b. The Requisition Items screen will be displayed (see below)</p> <p>c. Tap the blue arrow to the right of the “Line Type” line</p> <ul style="list-style-type: none"> • Tap “Service” 

<p>To order a “Service” continued...</p>	<p>d. In the “Description” field, type a description of the service you are requesting</p> <p>e. Edit the quantity by using the − + buttons</p> <p>f. Type or select the “Order Unit” (typically, “EACH”)</p> <p>g. Verify the information displayed is correct.</p> <p>h. To attach a photo, tap on the “Attachments” banner. Note: if Quantity and Order Unit are not entered first, you will not be able to attach a photo. Once you attach a photo you will not be able to edit the description, so make sure your description includes everything you need.</p> <div data-bbox="1089 491 1492 653" style="border: 1px solid black; padding: 5px;"> <p>Important: When requesting Services, if applicable, the scope of work document and vendor quote must be attached to the requisition. If using a mobile device, this must be a photo of</p> </div> <ul style="list-style-type: none"> • Tap on the camera on the upper right • Tap either “Take Photo” or “Choose Existing” as appropriate and follow prompts • Tap “Upload” in the top right corner to attach photo to this specific material requisition line. Multiple photos can be attached by repeating the process. • Tap on the “Back” button to return to the material requisition line. • The number of attachments will be displayed <p>i. Tap the “OK” button on the top right of the screen</p> <p>j. You will then see the Line item information populated at the bottom of the Create Requisition screen</p>
<p>10. Submit Requisition (or save for later)</p>	<p>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</p> <p>b. Tap on “Submit” to send the requisition to FM Procurement.</p> <p>Note: Modifications can no longer be made to the requisition after it has been submitted (other than adding a photo)</p> <div data-bbox="850 1146 1495 1881" style="border: 1px solid black; padding: 10px;"> </div>

<p><i>Submit a requisition continued ...</i></p>	<ul style="list-style-type: none"> • When the requisition is Submitted, a green bar will appear at the top of the screen: Requisition has been submitted. • The status of the MR will change to “DRAFT” • Click “Go To” – Start Center to return to your Start Center
<p>11. To view requisitions that you “Saved for Later”</p>	<ol style="list-style-type: none"> a. Tap on “Go To”, then tap on “View Requisitions” b. Tap “View Saved Requisitions” <ul style="list-style-type: none"> • Tap on the requisition description to open it • Tap the “Edit Requisition” button and you will be back where you left off c. To submit the Requisition, tap the “Submit” button
<p>12. To view requisitions that you Submitted</p>	<ol style="list-style-type: none"> a. Tap on “Go To”, then tap on “View Requisitions” b. Tap “View Submitted Requisitions” <ul style="list-style-type: none"> • Tap on the requisition description to open it
<p>The Result Will Be: 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.</p>	
<p>Reference Information: ¹SOP E1 ²SOP T2</p>	