



The main function of the Clerk role is data entry. This role has shortcut forms to expedite the data entry process for entering work orders, labor hours, and material purchases. Clerks can access all work orders. They can assign new requests, edit, and complete/close existing work orders.

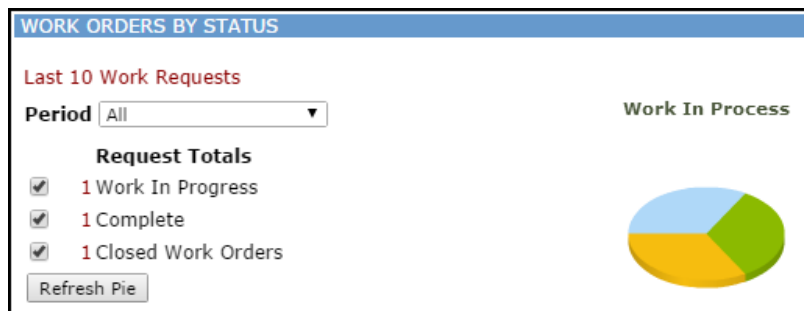
## How to Log In

- Open your web browser and type [md.schooldude.com](http://md.schooldude.com) into the address bar and hit the Enter key. Bookmark this page or create a shortcut on your desktop to make it easy to come back to this page later.
- On the Account Login screen, enter your **Login Name** and your **Password**.
- Make sure that **MaintenanceDirect** is selected in the Go To box.
- Click **Sign In**.

## Home Page

Upon logging into the MaintenanceDirect you will be directed to the home page. There are several main areas of the home page:

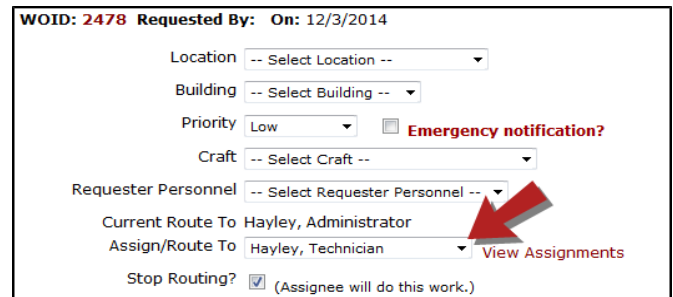
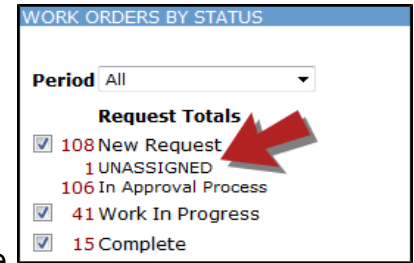
- **Keyboard Shortcut Tips:** This section on the left side of the home page gives you a list of keyboard shortcuts to use throughout the application to expedite data entry.
- **Work Orders by Status:** This center section shows you a breakdown of the statuses of all of the work orders in your account. The graph that will appear in this section reflects the number of work orders by status. You can use the Period drop down menu to change the time period being displayed.



- **Last 10 New Work Requests:** This section will show the last 10 new work requests entered into the system. You can assign the work order out, change the status, add an Action Taken note, or print the work order from this section.
- **Information Analysis:** These are links that provide access to various lists and reports.

## How to Assign a Work Order

- Click on the number displayed next to **Unassigned** to the left of the pie chart. You can also click on the **Assign New Request** tab at the top of the screen to access the same page.
- You are now on the Unprocessed view of the work order. On this page you have the option to change any of the information that was selected on the initial request (priority, craft, etc). Select the person's name from the **Assign/Route To** menu that you would like to assign the work order to.
- Once the user's name has been selected, scroll to the bottom of the form and click on the **Submit** button. You can also click on the **Submit & Print** button to print a hard copy of the work order.
- The screen will refresh with the next work order in the list that needs to be assigned. If needed, you can select a different work order to process from the drop down menu below **Unprocessed New Requests**.

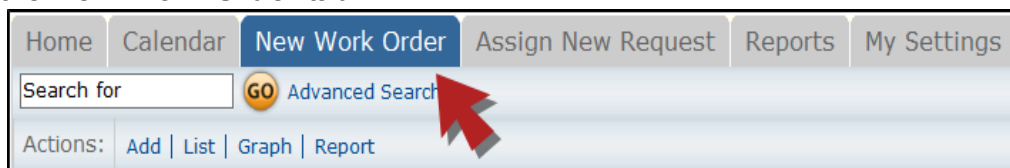


## How to Create a Work Order

The Clerk role has access to the short work order form designed to expedite the data entry process. Administrators are also able to access this Short Work Order form by clicking on the **Short Work Order Form** link in the Work Order Shortcuts menu at the top of the Work Order page.

*\*Fields that are marked with a red checkmark are required fields.*

- Click on the **New Work Order** tab.



- The **Date Received** will automatically populate with today's date. *\*Note: If entering a work order that has already been completed, this date can be changed to the date of the actual request.*

Work Order: NEW	
<b>Date Received</b> (ALT+V)	3/15/2012
<b>Date Completed</b> (CTRL+ALT+D)	
<input checked="" type="checkbox"/> <b>Priority</b> (ALT+Y)	Low
<input checked="" type="checkbox"/> <b>Location Info</b> (ALT+Z)	ABC High School
	<b>Building</b> <-- No Building Available -->
	<b>Area</b> Classroom
	<b>Contact Information</b>
	<b>Area Number</b> Rm 152
	<input type="checkbox"/> <b>Emergency</b> (ALT+M)

- If entering a work order that has already been completed, the **Date Completed** field allows you to identify the date the work was actually completed.

- From the **Priority** drop down box select the appropriate priority. Checking the **Emergency** check box, will make this work order appear in the Work Center section of the homepage as an emergency work order.
- Identify where the work needs to be done by choosing the **Location**.
- If your organization utilizes the **Building** field, select one from the drop down box.
- Choose the general **Area** type that best fits the location of the work request.
- Enter the specific area in the **Area Number** field. (The Area Number field is alphanumeric and is where you can enter specific room names or numbers.)
- Enter the complete request **Description** in the open text box.
- As a Clerk, you can either directly assign a work order to another user in the **Assigned To** drop down box or you can leave the drop down box empty for the work order to follow automatic routing rules.

<input checked="" type="checkbox"/> <b>Description</b> (ALT+I)	Replace damaged ceiling tile.	
<b>Assigned To</b> (ALT+G)	-- Select Assignee --	
<b>Action Taken</b> (ALT+K)		
<input checked="" type="checkbox"/> <b>Change Status</b> (ALT+C)	New Request	<b>Status Last Changed by</b>

- The **Action Taken** field is used to document what was done to resolve the problem or request. If entering a work order that has already been completed, you can enter an Action Taken note to communicate the resolution to the requester.
- In the **Change Status** drop down box, choose New Request. *\*Note: If entering a work order that is already in progress or has been completed, you can choose the appropriate status.*

<b>Budget Info</b> (ALT+B)	<b>Purpose</b>	General Maintenance	<b>Project</b>	-- Select Project --
	<b>Budget</b>	-- Select Budget Account --	<b>Extra Categories</b>	-- Select Extra Categories --
	<b>Craft</b>	Ceiling Tile	<b>Equipment</b>	<-- No Equipment Available -->
	<b>Classification</b>	<-- Select Classification -->		
	<b>Type</b>	<-- Select Type -->		
		<input type="button" value="Save"/>		
	(ALT+E)			

- Choose the **Purpose Code** that best describes *why* the work order is requested.
- Select the appropriate **Craft** to identify *what* type of work is being requested.
- If your organization is utilizing **Budget Codes**, the **Custom Category**, **Projects**, **Equipment**, or **Classifications** and **Types**, identify any of the codes by clicking on the drop down boxes.
- Click **Save**. The work order will now be assigned a work order ID number.

## How to Search For an Existing Work Order

There are two ways to search for an existing work order in the system, you can either use the **Search for** box or the **Advanced Search** function.

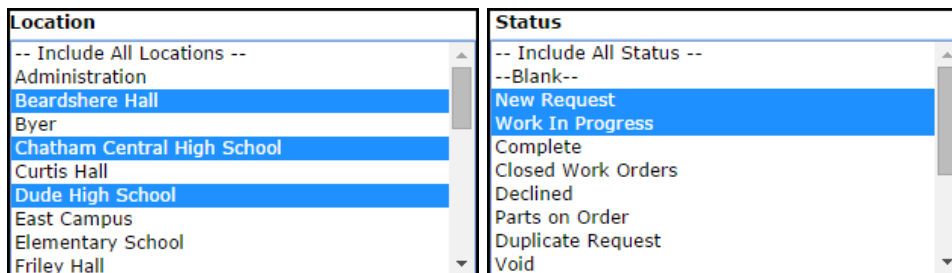
- To search for a single work order, type the work order ID number into the **Search for** box then click **Go**. That will pull up the short form of the work order.

**OR**

- To search for multiple work orders, click on the **Advanced Search** link.



- The Advanced Search allows you to filter for work orders by selecting options in any of the available search fields (Location, Assigned To, Status, Craft, etc.).
- To make a selection, click on an option in the desired field. You will see that option highlighted in blue. To make multiple selections in a single field; make the first selection, hold the CTRL key on your keyboard, and then click on the next selection.



- Once all of the necessary selections have been made, click on the **Search Now** button at the bottom of the page.
- From these search results, you can access a work order by clicking on the work order ID number (WOID), you can print an individual work order by clicking on the printer icon next to it, or you can print the entire list as either a PDF or Excel document by using the icons at the bottom of the page.

## CONTACT US

Got questions? Answers are what we're here for.

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