



# IWU Asset Essentials Technician Use Guide

Vers. 2 Edited July 2020 - Schroeder

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## Logging into Asset Essentials

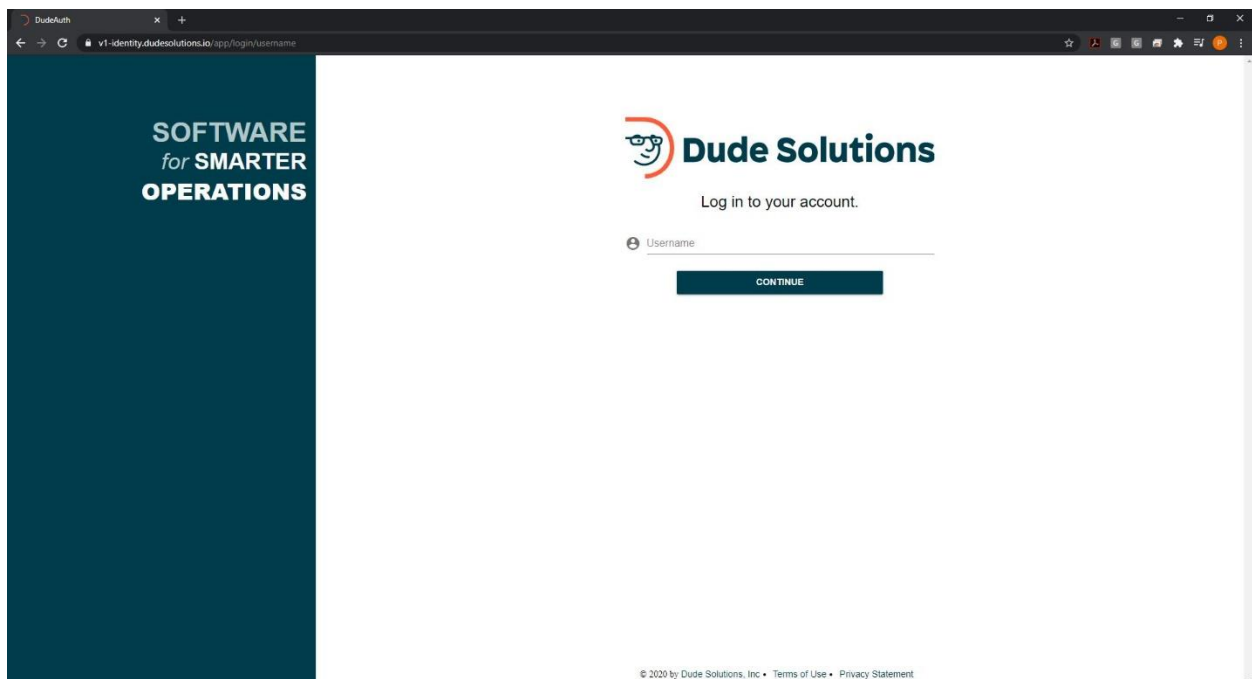
### A. Logging from Website Portal

Use link to launch Asset Essentials, <https://assetessentials.dudesolutions.com/IllinoisWesleyanUniv>

Our SchoolDude Account name is: IllinoisWesleyanUniv

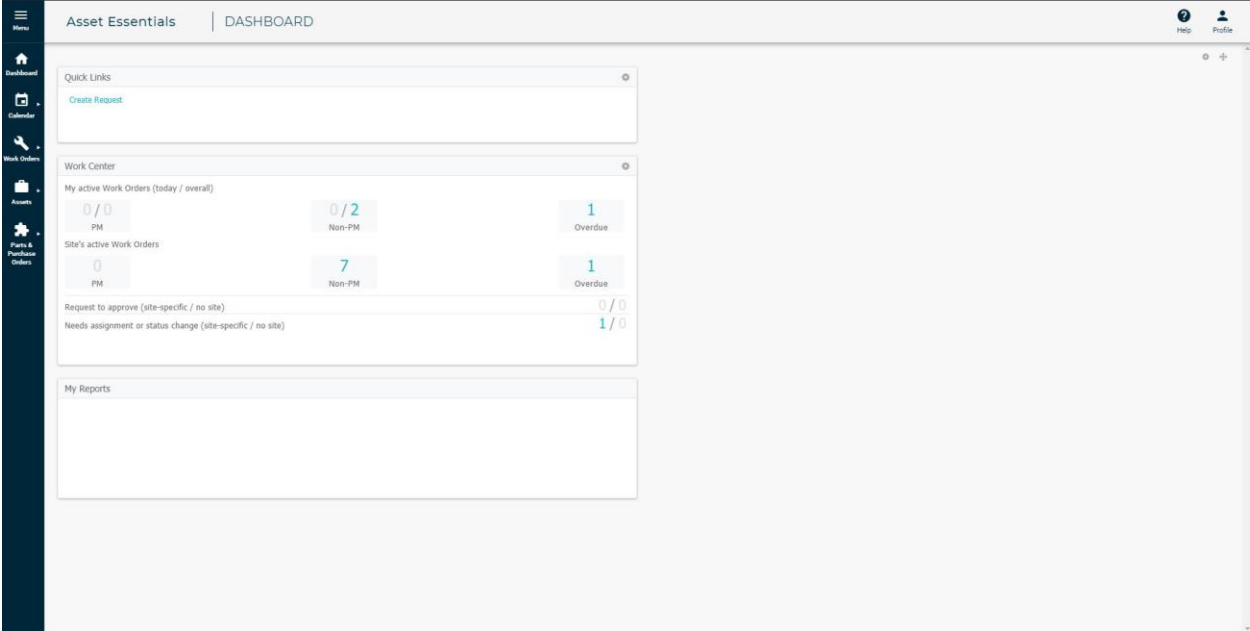
You will be taken to the Schooldude Authentication page

Please sign in using single sign-on (Google button) or logging in using your IWU email address



If you have issues logging into the system, please contact Physical Plant or use the Help Guides for more information <https://help.dudesolutions.com/Content/Login/Logging-In.htm>

Logging in will take you to your AE Dashboard. This holds information regarding your requests, work orders, PMs, and Parts



**B. Logging from Phone App**

Please download the Asset Essentials Mobile App from the app store of your phone (iOS or Android)

Launch the app and you will be presented with an account screen

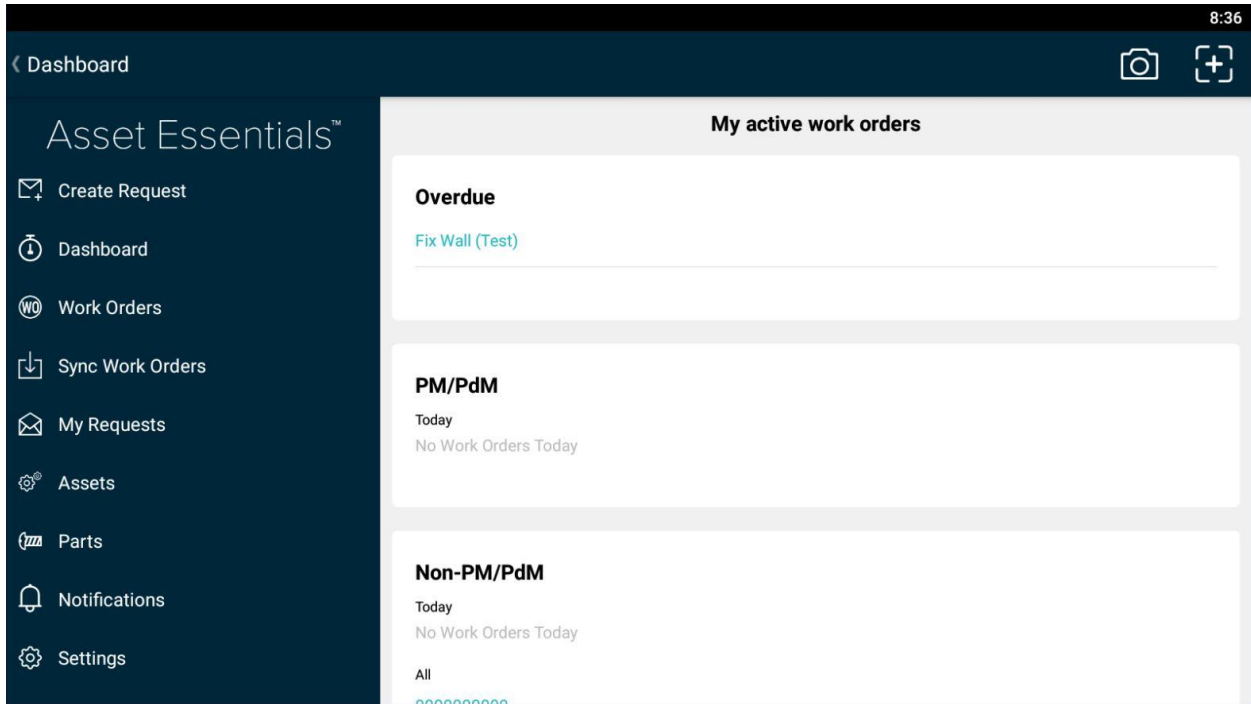


Our SchoolDude Account name is: IllinoisWesleyanUniv

Click next you will be presented with a log in screen, please enter your email address and password



If you have issues logging into the system, please contact Physical Plant or use the Help Guides for more information <https://help.dudesolutions.com/Content/Login/Logging-In.htm>



## Processing the Work Order

### A. Work Orders from Site

Within the Work Center of Dashboard are work orders assigned to you, separated between PM, Non-PM, and Overdue. Click on the desired work order type

The screenshot shows the 'Asset Essentials | DASHBOARD' interface. On the left is a vertical navigation menu with icons for Menu, Dashboard, Calendar, Work Orders, Assets, and Parts & Purchase Orders. The main content area is titled 'Work Center' and contains a 'Quick Links' section with a 'Create Request' button. Below this is a 'My active Work Orders (today / overall)' summary box, which is highlighted with a red border. This box displays three statistics: 0/0 PM, 0/2 Non-PM, and 1 Overdue. Below the summary are two rows of statistics: 0 PM, 7 Non-PM, and 1 Overdue. At the bottom of the summary section are two rows: 'Request to approve (site-specific / no site)' with 0/0 and 'Needs assignment or status change (site-specific / no site)' with 1/0. A 'My Reports' section is visible at the bottom of the dashboard.

This is the main portal of work orders assigned to you. You can filter for specific fields or set up views for specific results

The screenshot shows the 'Asset Essentials | WORK ORDERS' interface. The top navigation bar includes 'Menu', 'Dashboard', 'Calendar', 'Work Orders', 'Assets', and 'Parts & Purchase Orders'. The main content area is titled 'WORK ORDERS' and features a search and filter interface. The 'Location' filter is set to 'Illinois Wesleyan University'. The 'Source Type' is set to '[All]'. The 'Assigned To' is 'Alfred Test'. The 'Schedule' is '[All]'. The 'Date Type' is 'Originated' and the 'Date Ranges' is 'None'. Below the filters is a table of work orders. The table has columns for Work Order #, Title, WO Status, Priority, Origin, Source Asset, Source User, Assigned, and Expected. Two work orders are listed: one with ID 000000009 in 'In Progress' status with 'Medium' priority, and another with ID 000000008 titled 'Fix Wall (Test)' also in 'In Progress' status. The page shows 'Page 1 of 1 (2 items)' and a 'Page size' of 20.

Click on the WO you wish to work on

Please Note – You will need to activate the “New Form” slider option if it is available.

If you need to search for a work order, click the Work Order icon on the left side menu. This will show all Work Orders active depending on your permission. You can filter and search using the filter tools

The following is the detailed breakdown of the Work Order Form

## 1. Work Order Details



WORK ORDER DETAILS

WO Status * In Progress	Work Order # * 000000011	Expected MM/dd/yyyy HH:mm	AM
Title Please change light in this room	Priority Select Priority...	Estimated Hours 0	Estimated By User
Area/Room Number * 201			

- WO Status – This can be changed to “In Progress” for currently working, “Completed” for when a work order had been completed. “On Hold”, “Parts on Order”, and “Routed” are status’s only used by the planner.
- Work Order # - Work Order ID number
- Expected – Date and time the work is expected to be completed
- Title – A brief title of work needed for the WO. Please add a title to your work orders.
- Priority – The following are our types of Priorities and order of importance, highest importance first.

### Priority

- Critical
- High
- Medium

### Order of importance

- Emergency/Life Safety
  - Student Request
  - PM
  - Outside Requests (Non-Student)
  - Internal Requests
- Area/Room Number – Room number or area needed

## 2. Work Requested



WORK REQUESTED \*

Work Requested  
Please change light in this room

- This is the description of the work being requested

### 3. Work Source

Estimated Hours	Name	Location Path	Actions
0	Dodds AB Tower	Dodds Hall Dodds AB Tower	<a href="#">Remove</a>

- a. This could be Location or Asset based work order. Location is somewhere in the building, Asset as equipment supported.

### 4. Type of Work

Work Type: General Maintenance

Problem: Select Problem...

Work Category\*: Electrical

Cause: Select Cause...

- a. Work Type – (Previously called Purpose Code) Type of work needed, for example General Maintenance, Preventive Maintenance or Corrective Maintenance.
- b. Work Category – (Previously called Craft) – What category of work needed. Example electrical, plumbing, lighting.
- c. Problem, Cause – For the Planner. This replaces Classification and Type

### 5. Origin Info and Address

Origin: Non PM

Created: 06/17/2020 02:17 PM

Originator\*: Patrick Schroeder

Assigned: 06/17/2020 01:20 PM

Address 1: 1312 N Park St

City: Bloomington

Country: United States

Address 2: Enter Address...

State/Province: Illinois

Postal Code: 61702-2900

- a. This includes who originally created the work order, and listed address. You can use the Contact User button to copy the email address to your clipboard. Paste this in Gmail to email the user

## 6. Tasks – PM’s

^ TASKS										
Step	User	Task Type	Done?	Asset	Name	Description	Meter Title	Reading	Document	Actions
1		Instruction				Flush all toilets not being used 2 minutes per week				Edit Mark as done Delete
2		Instruction				Let all sinks & showers run until rust looking water is clear				Edit Mark as done Delete
3		Instruction				Run water into floor drains				Edit Mark as done Delete
4		Instruction				Run all drinking fountains for 2 minutes				Edit Mark as done Delete

- Usually appearing for PM work orders, this will list the tasks needed to complete the work order.
- These tasks may be instructional of what to do, or may be a meter reading on the equipment.
- Click “Mark as Done” When this is completed

## 7. Action Taken

^ ACTION TAKEN

Completed

MM/dd/yyyy HH:mm AM

Action Taken

Enter Value...

- List the action or notes taken on the work order. Please use this area for all notes or comments about your work. Please put your name and date for each note
- Completed field will be auto-completed once the work order status is changed to completed

## 8. Assignee

^ ASSIGNEE *							
Index	Estimated Hours	Start at: Days/Hours/Mins from the Assigned date/time	Employee #	First Name	Last Name	Department	
1	0	0 Days : 0 Hours : 0 Minutes		Patrick	Schroeder		

- Who the work order is assigned to. This can hold more than one employee



9. Labor

- a. Click Add Employee Labor
- b. Enter your hours worked and what type of labor it is. You may need to adjust the Date and Time for hours worked.

10. Parts and Purchases

Part Name	Part #	Quantity	Unit	Usage Type	Work Source	Inventory Location	Part Storage	Date Used	Cost Center	Price	Actions
Test_Part_20_0528	0000000001	1	case	Dispatched	Grounds Building (Test)	Holmes Hall		05/28/2020 02:55:02 PM		\$4	Remove

- a. This area will show parts used or purchase orders created for this work order
  - i. Select Add Part to open the add Part window

Part Name	Part #	Unit	Total Available	Total On-Hand
Uni-Ball Pens	69000	each	9	9
Test_Part_20_0528	0000000001	case	11	11

- ii. Select your part to add to the work order
- iii. Adjust the number of parts used  
If there is none on-hand contact Planner

## 11. Planning

^ PLANNING

Project  
Click to Select... ⊕

Cost Center  
Select Cost Center... ▼

- a. Only the Planner will be using this section for Cost Center (previously Budget Code) and Project for the work order

## 12. Attachments

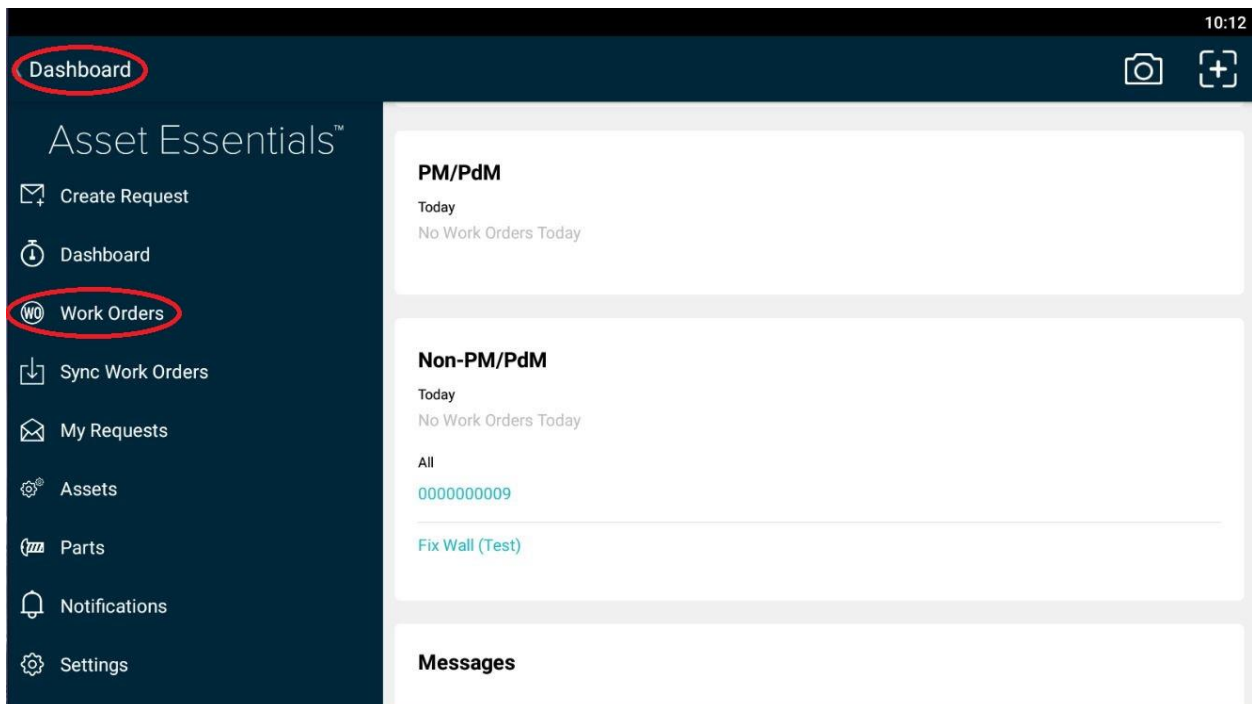
^ ATTACHMENTS ⊕ ADD

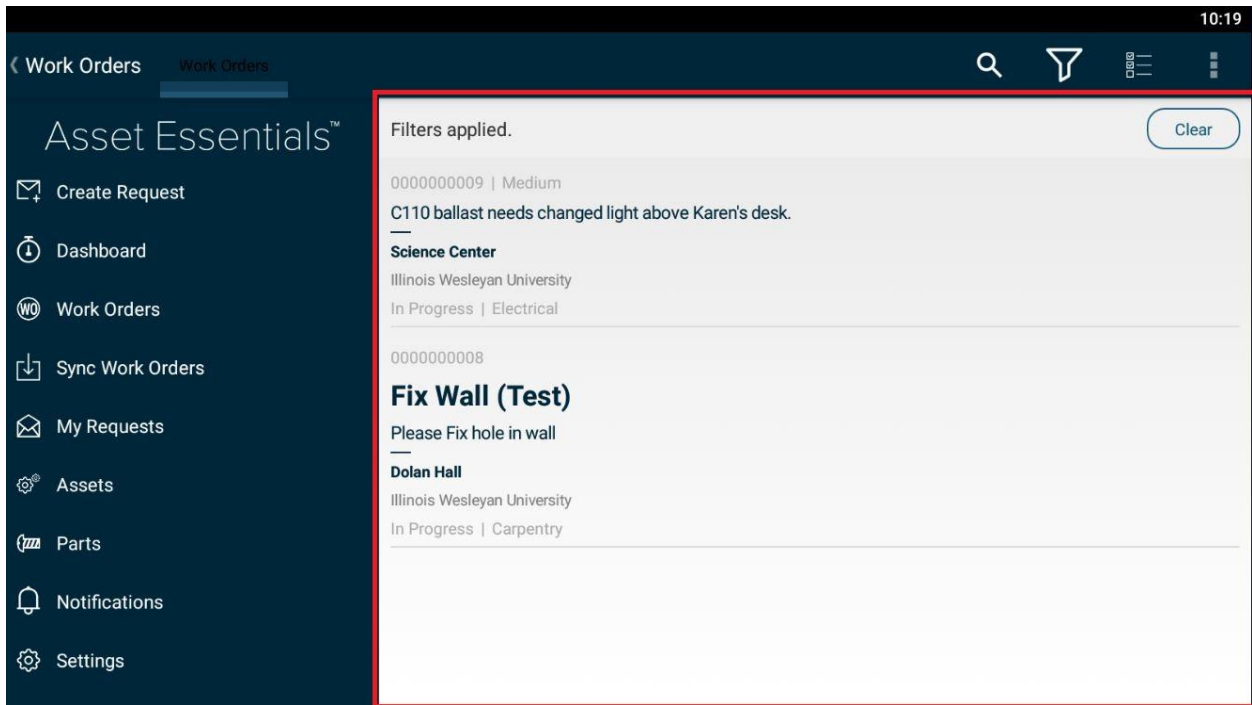
Add attachments to associate supporting documents to this Work Order

- a. Can attach any number of images or documents for this work order

## B. Work Orders from App

From the Dashboard screen, navigate to Work Orders. The dashboard will list all active work orders assigned to you, but will not show detailed information

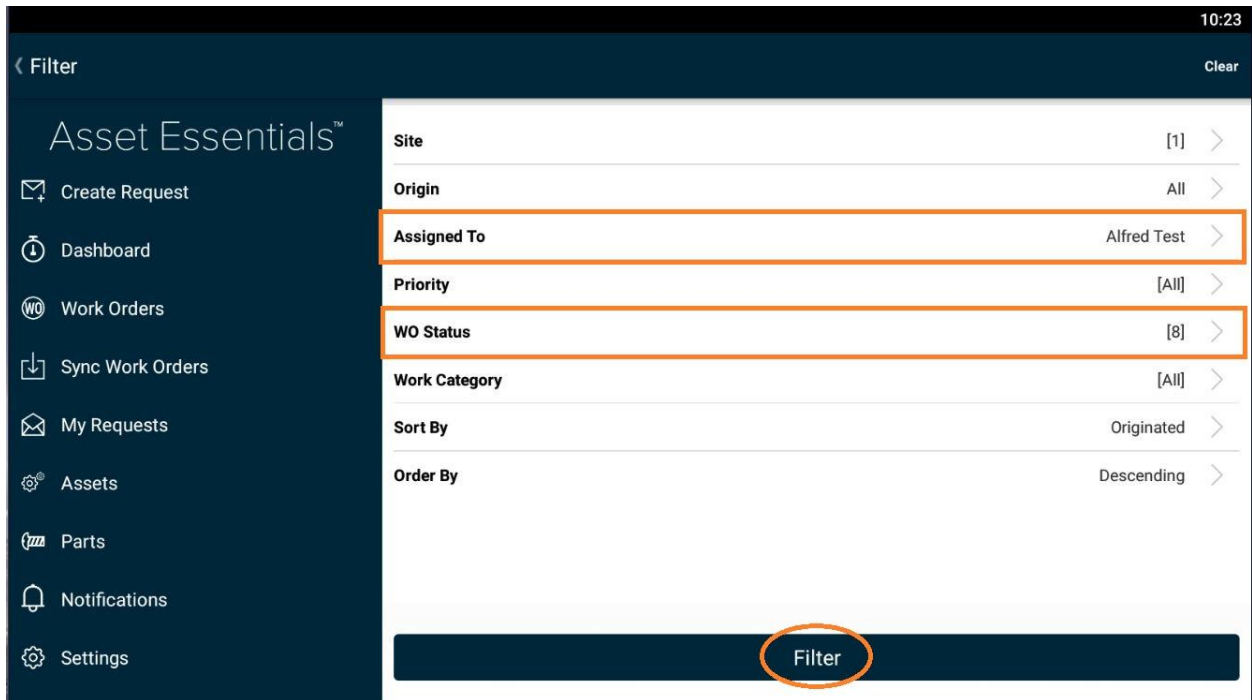


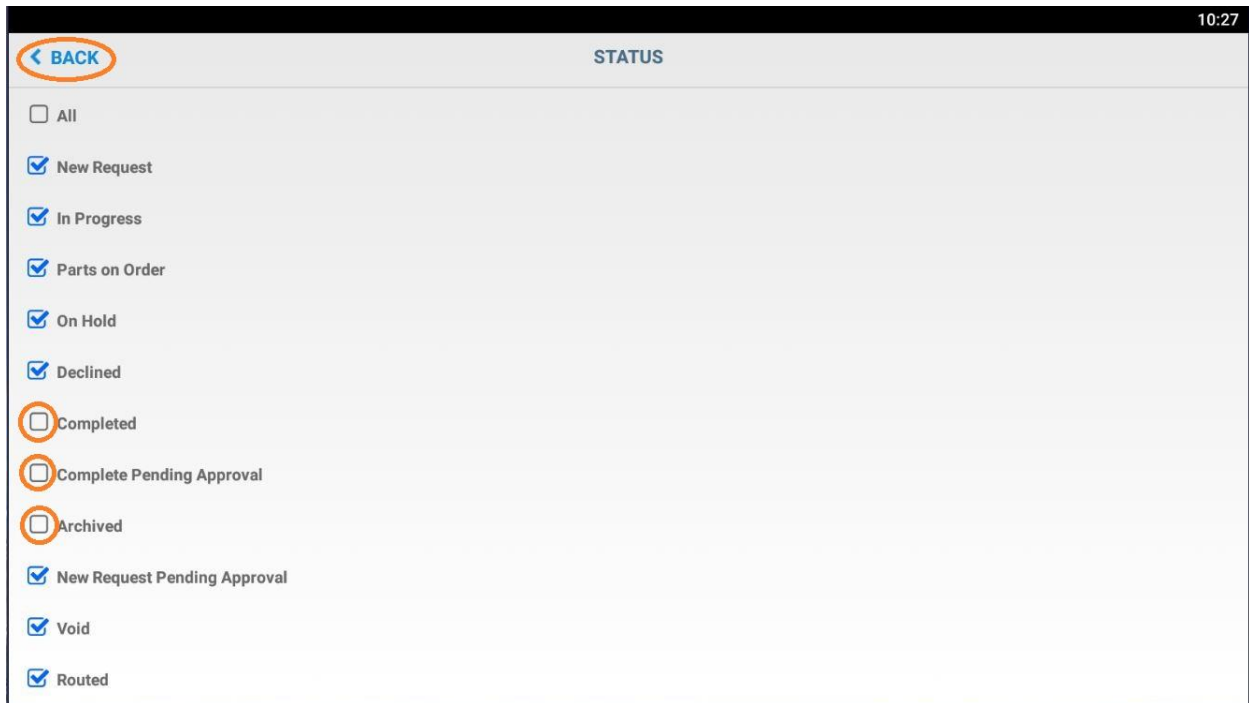


If this is the first time opening the app, you will need to set up filters to see your assigned work.

Click on the Filter icon on the top right of the screen

Within the table of filters, select you as assigned to, and under status deselect completed and archived work orders. Tap Back and Tap Filter to apply these changes. You will see only active workorders now





*If you need to search for a work order, you will need to clear your filter and use the search icon. When you are done, you will need to reapply your filters so you see your work*

The following is the detailed breakdown of the Work Order Form

### 1. General Information

- a. WO Status – This can be changed to “In Progress” for currently working, “Completed” for when a work order had been completed. “On Hold”, “Parts on Order”, and “Routed” are status’s only used by the planner.
- b. Work Order # - Work Order ID number

- c. Expected – Date and time the work is expected to be completed
  - d. Title – A brief title of work needed for the WO. Please add a title to your work orders.
  - e. Priority – The following are our types of Priorities and order of importance, highest importance first.
    - i. Priority
    - ii. Critical
    - iii. High
    - iv. Medium
- Order of importance
- v. Emergency/Life Safety
  - vi. Student Request
  - vii. PM
  - viii. Outside Requests (Non-Student)
  - ix. Internal Requests
- f. Area/Room Number – Room number or area needed
  - g. Work Requested - This is the description of the work being requested

## 2. Work Source

The screenshot shows a web form with a dropdown menu labeled 'Locations \*'. The selected item is 'Dolan Hall', which is displayed in blue text. Below the selected item, the text 'Illinois Wesleyan University' is visible. At the bottom right of the dropdown, there is a '+ Location' button and a barcode icon.

- a) This could be Location or Asset based work order. Location is somewhere in the building, Asset as equipment supported.

### 3. Work Type

The screenshot shows a form with a 'Work Types' dropdown menu. The selected option is 'Work Type'. Below it, 'General Maintenance' is listed. The next dropdown is 'Work Category \*', with 'Carpentry' selected. Below that, 'Problem' is selected, and 'Select Problem' is listed. Finally, 'Cause' is selected, and 'Select Cause' is listed. Each dropdown has a right-pointing chevron icon.

- a) Work Type – (Previously called Purpose Code) Type of work needed, for example General Maintenance, Preventive Maintenance or Corrective Maintenance.
- b) Work Category – (Previously called Craft) – What category of work needed. Example electrical, plumbing, lighting.
- c) Problem, Cause – For the Planner. This replaces Classification and Type

### 4. Originator and Address

The screenshot shows two sections. The first is 'Originator', which displays 'Patrick Schroeder' and a blue envelope icon labeled 'Contact User'. The second is 'Address', which displays '1312 N Park St' and a text input field labeled 'Enter Address'.

- a) This includes who originally created the work order, and listed address. You can use the Contact User button to copy the email address to your clipboard. Paste this in Gmail to email the user

5. Tasks – PMs

**Task**

- 1. Flush all toilets not being used 2 minutes per week  
*Instruction*
- 2. Let all sinks & showers run until rust looking water is clear  
*Instruction*
- 3. Run water into floor drain  
*Instruction*
- 4. Run all drinking fountains for 2 minutes

- a) Usually appearing for PM work orders, this will list the tasks needed to complete the work order.
- b) These tasks may be instructional of what to do, or may be a meter reading on the equipment.
- c) Click “Mark as Done” When this is completed

6. Action Taken

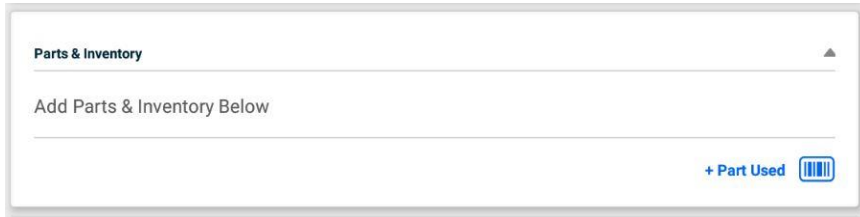
- a) List the action or notes taken on the work order. Please use this area for all notes or comments about your work. Please put your name and date for each note
- b) Completed field will be auto-completed once the work order status is changed to completed

7. Assigned To

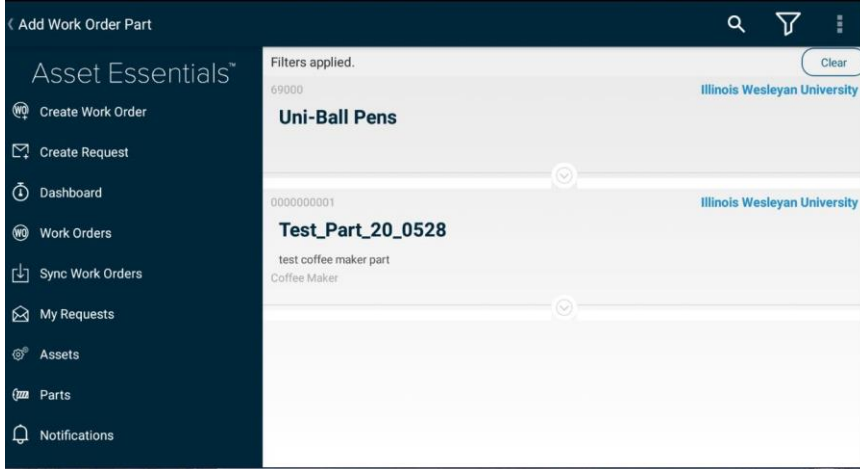
- a) Who the work order is assigned to. This can hold more than one employee

8. Parts & Inventory

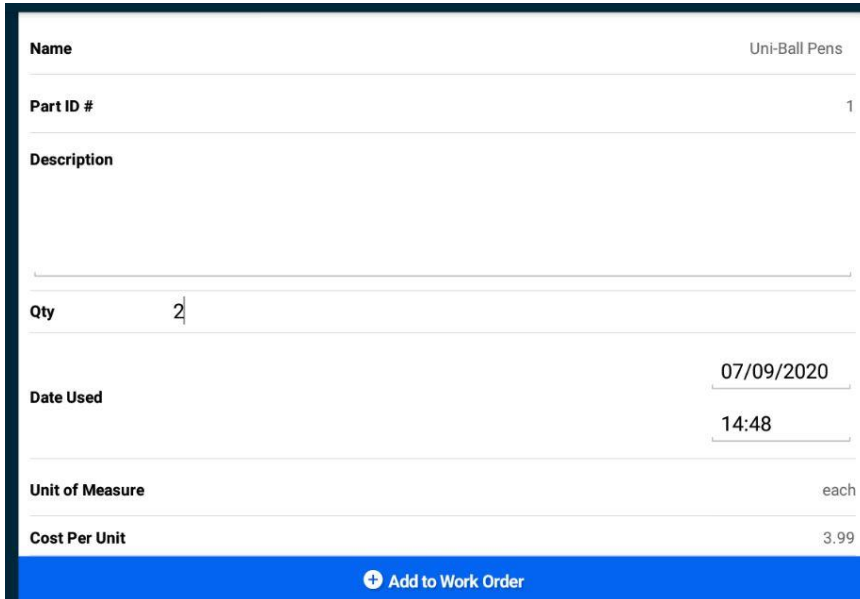
a) Select Part Used



b) Select your part, you can filter by Category, location, etc



c) Adjust quantity used and tap add to work order





## 9. Labor Entries

**Labor Entries** ▲

**ADD LABOR** | LABOR LOG

Add Users and Create Labor Entry For:

+ 👤 **Denny D** ×

0 | 59

---

1 hours | 0 mins

---

2 | 1

User Pay Rate

User's Default Wage >

**Add Labor Entry**

+ External Labor

- Scroll to enter your labor worked and tap Add Labor Entry. You can modify your own entry by selecting Labor Log. Do not enter External labor

## 10. Planning

**Planning** ▲

Cost Center

**Maintenance** >

Project

Select Project >

- Only the Planner will be using this section for Cost Center (previously Budget Code) and Project for the work order

## 11. Attachments



- a) Can attach any number of images or documents for this work order

## Extras

### Using Barcodes and QR Codes

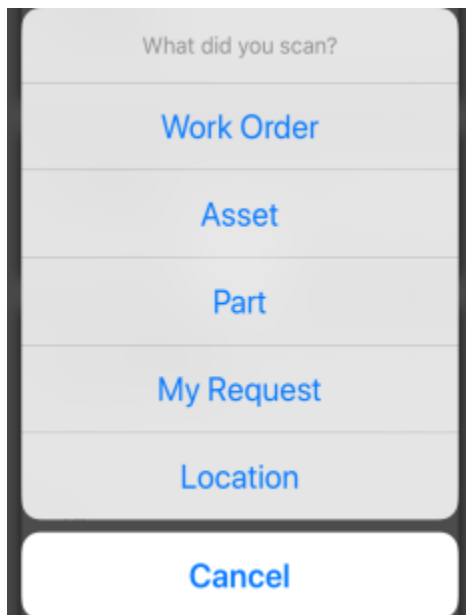
The Asset Essentials Mobile App allows you to scan barcodes or QR codes to quickly look up work orders, assets, and parts.

#### A. Scanning Barcodes

Tap the scanner icon (📷).

Scan the item's barcode.

Select the type of item that was scanned. This will bring up the summary information for that item.



Tap on the item to access more actions. For example, when you scan an Asset, the available actions include creating a new work order, viewing work order history, or editing information about that Asset.

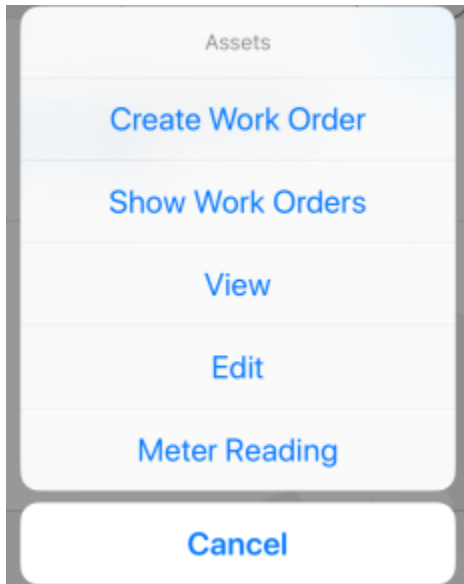
\*Note: The actions available will depend on the type of item that was scanned.

## B. Scanning QR Codes

Tap the scanner icon (📷).

Scan the item's QR code.

The app will recognize the type of item you have scanned and provide you with a list of actions to take appropriate for that item.



Tap on the necessary action. For example, if you scanned an asset's QR code, you will be able to create a new work order, show work order history, view the asset's details, edit the asset's details, or record a new meter reading. *\*Note: The actions available will depend on the type of item that was scanned.*

## Need More Help?

Use the following online help guide from School Dude for more information. Or Contact Physical Plant

<https://help.dudesolutions.com/Content/Documentation/Maintenance/Asset%20Essentials%20Edu/Asset%20Essentials.htm>