

Version 25



Trapeze

Enterprise Asset Management

Shop Activity - Production Manager

Administrator Guide

Trade Secret | February 2025

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Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Shop Activity Production Manager - Administrator Guide

Version 25.x

February 2025

Contents

1. Overview.....	1
Requirements.....	1
Assumptions	2
2. Installation and Upgrade	3
Install Module.....	3
Add Shop Activity Production Manager Portal Tab to Web Modules	3
Upgrade an Existing Web Modules Instance.....	3
Add a Shop Activity Production Manager Portal Tab to Web Modules.....	3
3. Configure Production Manager.....	4
Location Settings Profiles	5
Asset Type Profiles	5
Add new profiles or edit existing profiles.....	6
The Header Profile Detail Edit page	8
Header Preview Section.....	9
Header Preview section	10
Edit Header Section	11
Portal-Wide Settings.....	14
Parts Actions Settings.....	16
Settings	16
Permissions	19
PM Check List Reporting Settings	20
Settings for Work Order Main Page	20
Settings for Work Order Detail Page.....	20
Settings for Work Order Posting Page	21
Settings for New Work Order Page.....	21

1. Overview

The Shop Activity Production Manager Portal is designed to provide your organization's production managers with a single easy-to-use portal to all of the screens and functions required during their workday. Production Managers can use this portal to perform the following functions:

- View and manage production requests
- Create work orders for production runs
- Request parts for work orders on production runs
- View and assign work
- View current status of employees on shop floor
- Request or post parts for work orders and view status of past requests and postings
- Place work orders into and out of delay status
- Create and update test results related to work orders
- Add comments and notes to work orders
- Create new work orders
- Place work orders into WORK FINISHED status
- Assign employees to existing work orders
- Review and close work orders
- Post data to work orders after-the-fact (i.e., 3 Cs, labor, parts)

The look and feel of the Shop Activity Production Manager Portal was designed specifically to make data entry as easy as possible while maximizing the effect on the system. The buttons and workflow of the module support the use of touchscreen monitors, removing the need to use a mouse and minimizing the use of a keyboard.

Requirements

Application 25.x

Web Modules 25.x

Assumptions

This guide assumes familiarity with workflows and configuration of the application.

-  User defined required fields that do not appear in the Web Modules will return validation messages.
-  Special characters cannot be placed into the Web Modules fields or unanticipated results may occur. This would include any character that can not be typed with a standard keyboard.
-  Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.
-  Do not open or use the same instance of the web portals in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Installation and Upgrade

Installation: Initial module installation on the single machine that houses the Web Modules engine and Web broadcasting elements.

Upgrade: Upgrading a previously installed instance of Shop Activity Module version 1.6.x or greater.

No installation is required for Shop Activity Storekeeper Portal end user workstations.

Install Module

Please refer to the *Administrator Guide, Install and Configure Web Modules* section for instructions on installing Web Modules.

Add Shop Activity Production Manager Portal Tab to Web Modules

To make the functions of the Shop Activity Production Manager Portal available to Web Modules users, create the tab and assign rights for supervisors.

Please refer to the *Administrator Guide, Web Modules Configuration - Adding Modules and Tabs* section for detailed instructions on adding new tabs and configuring security access for those tabs.

Upgrade an Existing Web Modules Instance

Please refer to the *Administrator Guide, Install and Configure Web Modules* section for instructions on installing and upgrading Web Modules.

Add a Shop Activity Production Manager Portal Tab to Web Modules

If you have not previously added a tab to make the functions of the Shop Activity Production Manager Portal available to Web Modules users, you need to create a tab and assign rights for supervisors.

Please refer to the *Administrator Guide, Web Modules Configuration - Adding Modules and Tabs* section for detailed instructions on adding new tabs and configuring security access for those tabs.

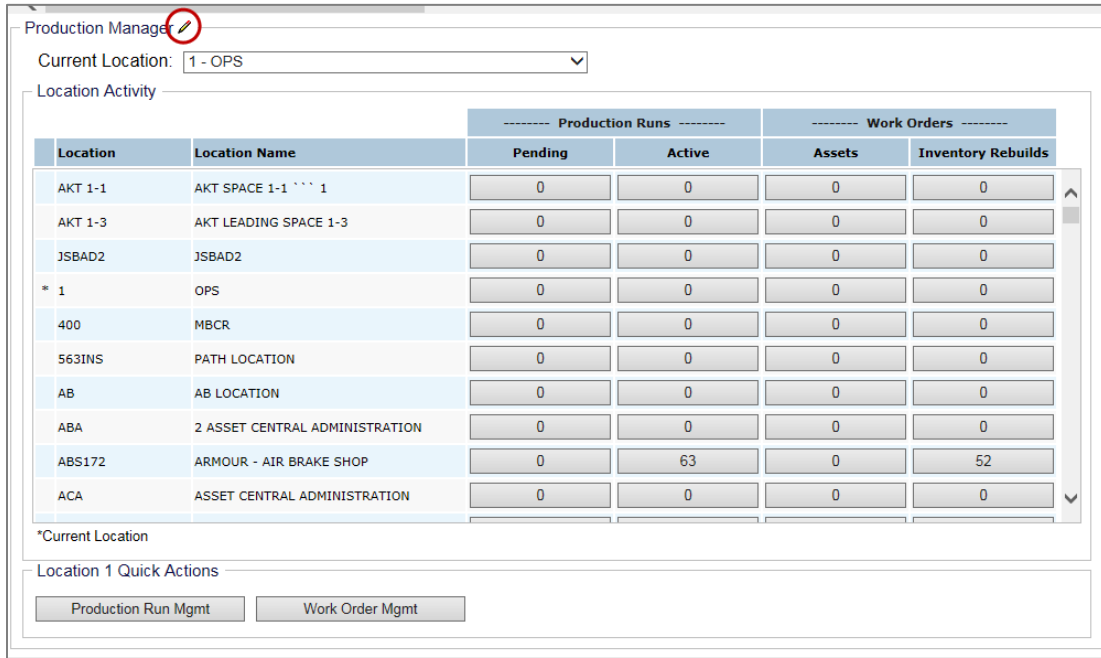


The Shop Activity Production Manager Portal does not support anonymous access to “All Users.” A user must be logged into Web Modules for this module to function.

3. Configure Production Manager

Once you have added the Production Manager Portal tab to Web Modules, log in to Web Modules as Administrator, and click on the Production Manager tab.

The Production Manager page displays. To configure the Production Manager settings, click on the pencil icon next to the Production Manager title bar.



The screenshot shows the 'Production Manager' interface. At the top, there is a 'Current Location' dropdown menu set to '1 - OPS'. Below this is a 'Location Activity' section containing a table. The table has columns for 'Location', 'Location Name', 'Pending', 'Active', 'Assets', and 'Inventory Rebuilds'. The table lists several locations, with 'AKA' (ASSET CENTRAL ADMINISTRATION) highlighted in blue. Below the table, there is a '*Current Location' label and a 'Location 1 Quick Actions' section with two buttons: 'Production Run Mgmt' and 'Work Order Mgmt'.

Location	Location Name	Production Runs		Work Orders	
		Pending	Active	Assets	Inventory Rebuilds
AKT 1-1	AKT SPACE 1-1 *** 1	0	0	0	0
AKT 1-3	AKT LEADING SPACE 1-3	0	0	0	0
JSBAD2	JSBAD2	0	0	0	0
* 1	OPS	0	0	0	0
400	MBCR	0	0	0	0
563INS	PATH LOCATION	0	0	0	0
AB	AB LOCATION	0	0	0	0
ABA	2 ASSET CENTRAL ADMINISTRATION	0	0	0	0
ABS172	ARMOUR - AIR BRAKE SHOP	0	63	0	52
ACA	ASSET CENTRAL ADMINISTRATION	0	0	0	0

*Current Location

Location 1 Quick Actions

Production Run Mgmt Work Order Mgmt

The Production Manager Portal Settings page displays.

This page is divided into the nine sections as outlined below: Location Settings Profiles, Asset Type Profiles, Portal-wide Settings, Parts Actions Settings, PM Check List Reporting Settings, Settings for Work Order Main page, Settings for Work Order Detail, Settings for Work Order Posting page, and Settings for New Work Order page.



Note: All settings listed as **Mobile only** are version, type, and application specific.

Location Settings Profiles



For information on setting up Location Settings Profiles, refer to *General Application Information: Section 2. Location Settings Profiles*.

Asset Type Profiles

The **Edit Header Layout** button provides customizable header control that supports different profiles based on the asset's asset type (i.e., Asset, Component, Linear, Inventory Rebuild, etc.). Users can choose which fields, depending on the context, to display in the page's header for each asset type.

Click **Edit Header Layout** in the Asset Type Profiles section of the Settings page to display the list of currently-defined header profiles and their associated Asset Types display. There is always at least one profile available, which is named **Default Settings**, and this is used when there is no other profile to apply. Because Production Runs do not have Asset Type, the **Default Settings** profile is also the profile that is used to customize the display of production run fields.

Asset Type Page Header Profiles

Search:

	Profile Name	Asset Type(s)
Edit	Default Settings	

[New Header Profile](#)

[Back](#)

Upon first accessing the page, Default Settings is the only currently-defined header profile

Asset Type Page Header Profiles

Search:

	Profile Name	Asset Type(s)
Edit	Default Settings	
Edit	ELECTRICAL,	ELECTRICAL, EQUIPMENT

[Delete](#)

[New Header Profile](#)

[Back](#)

Once additional profiles are created, they appear in the list and may be Edited or Deleted

Add new profiles or edit existing profiles

Use the Header Profile Detail page to add a new profile or edit an existing profile.

1. Click **New Header Profile** to add a new profile

The screenshot shows the 'Asset Type Page Header Profiles' interface. It includes a search bar at the top right. Below it is a table with two columns: 'Profile Name' and 'Asset Type(s)'. The first row is 'Default Settings'. To the left of this row is an 'Edit' button. At the bottom left of the page, there is a 'New Header Profile' button, which is highlighted with a red circle and a red arrow pointing to it.

	Profile Name	Asset Type(s)
Edit	Default Settings	

[New Header Profile](#)

2. Click **Edit** to edit an existing profile

The screenshot shows the 'Asset Type Page Header Profiles' interface. It includes a search bar at the top right. Below it is a table with two columns: 'Profile Name' and 'Asset Type(s)'. The first row is 'Default Settings' with an 'Edit' button to its left. The second row is 'ELECTRICAL, EQUIPMENT' with 'Edit' and 'Delete' buttons to its left. The 'Edit' button for the second row is highlighted with a red circle and a red arrow pointing to it. At the bottom left, there is a 'New Header Profile' button, and at the bottom center, there is a 'Back' button.

	Profile Name	Asset Type(s)
Edit	Default Settings	
Edit Delete	ELECTRICAL,	ELECTRICAL, EQUIPMENT

[New Header Profile](#)

[Back](#)

*The Header Profile Detail Edit page displays upon clicking the **New Header Profile** button or the **Edit** button.*

Header Profile Detail

Profile Name

Asset Type(s)
ASSET

Add
Remove
Remove All

Edit Header

Expand field group to view and edit fields.
Click and drag fields within a group to change order.
Expand fields to view and edit details.

Asset Fields
Work Order Fields
Service Request Fields
Test Fields
Task Fields

Header Preview

This is only an approximation. Visible fields are determined by the page and other data conditions.
Fields without data are hidden unless "Always Show" is enabled.
See field details for more information.

Show All Fields

Asset ID	Asset ID		
Asset Number	Asset Number	Station Location	Station Location
License Number	License Number	Repair Location	Repair Location
Operator Name	Operator Name	Operator Phone	Operator Phone
Part ID	Part ID		
Work Order ID	Work Order ID	Job Status	Job Status
Job Type	Job Type	Technician	Technician
PM Service	PM Service	PM Scheduled	PM Scheduled
Restock Location	Restock Location	Rebuild Quantity	Rebuild Quantity
Unit In	Unit In	Due	Due
Current Stage	Current Stage		
Work Order Offset	Work Order Offset		
Current Work Delay	Current Work Delay	Service Status	Service Status
Meter 1	Meter 1	Meter 2	Meter 2
Contact	Contact	Contact Phone	Contact Phone
Service Request ID	Service Request ID	Incident ID	Incident ID
SR Symptom	SR Symptom		
SR Task	SR Task		
Service Request Offset	Service Request Offset		
SR Contact Name	SR Contact Name	SR Contact Phone	SR Contact Phone
Test ID	Test ID	Test Type	Test Type
Task	Task		

Back
Save

The Header Profile Detail Edit page

From this page, it is possible to choose one or more asset types to assign to the profile.



Asset type assignment is not available for the **Default Settings** profile.

Header Profile Detail

Profile Name:

Asset Type(s): ▼

Add Asset Types by selecting type(s) from dropdown and clicking the Add button

←

Edit Header
Expand field group to view and edit fields.
Click and drag fields within a group to change order.
Expand fields to view and edit details.

- Asset Fields +
- Work Order Fields +
- Service Request Fields +
- Test Fields +
- Task Fields +

Header Preview
This is only an approximation. Visible fields are determined by the page and other data conditions.
Fields without data are hidden unless Always Show is enabled.
See field details for more information.

Show All Fields ▼

Asset ID	Asset ID	Station Location	Station Location
Asset Number	Asset Number	Repair Location	Repair Location
License Number	License Number	Operator Name	Operator Name
Operator Name	Operator Name	Operator Phone	Operator Phone
Part ID	Part ID	Job Status	Job Status
Work Order ID	Work Order ID	Technician	Technician
Job Type	Job Type	PM Scheduled	PM Scheduled
PM Service	PM Service	Rebuild Quantity	Rebuild Quantity
Restock Location	Restock Location	Due	Due
Unit In	Unit In		
Current Stage	Current Stage		
Work Order Offset	Work Order Offset		
Current Work Delay	Current Work Delay	Service Status	Service Status
Meter 1	Meter 1	Meter 2	Meter 2
Contact	Contact	Contact Phone	Contact Phone
Service Request ID	Service Request ID	Incident ID	Incident ID
SR Symptom	SR Symptom		
SR Task	SR Task		
Service Request Offset	Service Request Offset		
SR Contact Name	SR Contact Name	SR Contact Phone	SR Contact Phone
Test ID	Test ID	Test Type	Test Type
Task	Task		

Select asset types to add to the profile as desired

Header Preview Section

From the Header Profile Detail page, it is possible to customize header profiles, and it is also possible to preview the header in the Header Preview.

Header Preview

This is only an approximation. Visible fields are determined by the page and other data conditions.

Fields without data are hidden unless Always Show is enabled.

See field details for more information.

Show All Fields

Asset ID	Asset ID		
Asset Number	Asset Number	Station Location	Station Location
License Number	License Number	Repair Location	Repair Location
Operator Name	Operator Name	Operator Phone	Operator Phone
Part ID	Part ID		
Work Order ID	Work Order ID	Job Status	Job Status
Job Type	Job Type	Technician	Technician
PM Service	PM Service	PM Scheduled	PM Scheduled
Restock Location	Restock Location	Rebuild Quantity	Rebuild Quantity
Unit In	Unit In	Due	Due
Current Stage	Current Stage		
Work Order Offset	Work Order Offset		
Current Work Delay	Current Work Delay	Service Status	Service Status
Meter 1	Meter 1	Meter 2	Meter 2
Contact	Contact	Contact Phone	Contact Phone
Service Request ID	Service Request ID	Incident ID	Incident ID
SR Symptom	SR Symptom		
SR Task	SR Task		
Service Request Offset	Service Request Offset		
SR Contact Name	SR Contact Name	SR Contact Phone	SR Contact Phone
Test ID	Test ID	Test Type	Test Type
Task	Task		

Header Preview section

Because not all fields/context are available at the same time, the user can choose the contexts to preview. For example, the user can see what the header will look like for the Task Detail page, on a Service Request, on a Work Order, for an Asset. Possible header preview options can be seen by changing the value of the **Show all fields** selector in the Header Preview section.

➡ Select a value to preview from the Show All Fields selector drop-down.

Header Preview

This is only an approximation. Visible fields are determined by the page and other data conditions.
Fields without data are hidden unless Always Show is enabled.
See field details for more information.

➡ Select the header type to preview from the dropdown

Show All Fields

- Show All Fields
- Non-linear Asset
- Linear Asset
- Service Request (Non-linear Asset)
- Service Request (Linear Asset)
- Service Request on WO (Non-linear Asset)
- Service Request on WO (Linear Asset)
- Work Order (Non-linear Asset)
- Work Order (Linear Asset)
- Work Order (Part Rebuild)
- Task on SR on WO (Non-linear Asset)
- Task on SR on WO (Linear Asset)
- Task on WO (Non-linear Asset; no SR)
- Task on WO (Linear Asset; no SR)
- Production Run
- Production Run Work Order (Part)
- Production Run Work Order (Non-linear Asset)
- Test Result on Work Order (Non-linear Asset)
- Test Result on Work Order (Linear Asset)

Station Location	Station Location
Repair Location	Repair Location
Operator Phone	Operator Phone
Job Status	Job Status
Technician	Technician
PM Scheduled	PM Scheduled
Rebuild Quantity	Rebuild Quantity
Due	Due
Service Status	Service Status
Meter 1	Meter 1
Meter 2	Meter 2
Contact	Contact
Contact Phone	Contact Phone
Service Request ID	Service Request ID
Incident ID	Incident ID
SR Symptom	SR Symptom
SR Task	SR Task
Service Request Offset	Service Request Offset
SR Contact Name	SR Contact Name
SR Contact Phone	SR Contact Phone
Test ID	Test ID
Test Type	Test Type
Task	Task

The selected Header Preview displays.

Header Preview

This is only an approximation. Visible fields are determined by the page and other data conditions.
Fields without data are hidden unless Always Show is enabled.
See field details for more information.

Service Request on WO (Linear Asset)

Asset ID	Asset ID		
Asset Number	Asset Number	Station Location	Station Location
License Number	License Number	Repair Location	Repair Location
Operator Name	Operator Name	Operator Phone	Operator Phone
Work Order ID	Work Order ID	Job Status	Job Status
Job Type	Job Type	Technician	Technician
PM Service	PM Service	PM Scheduled	PM Scheduled
Unit In	Unit In	Due	Due
Work Order Offset	Work Order Offset		
Current Work Delay	Current Work Delay	Service Status	Service Status
Contact	Contact	Contact Phone	Contact Phone
Service Request ID	Service Request ID	Incident ID	Incident ID
SR Symptom	SR Symptom		
SR Task	SR Task		
Service Request Offset	Service Request Offset		
SR Contact Name	SR Contact Name	SR Contact Phone	SR Contact Phone



Note that this is just a rough approximation, as the data itself may drive what fields are displayed. For example, meter information is determined by the meters class defined for the asset. If the asset has no meters defined, then the meter fields will be hidden. Another example is that PM service will, by default, only show for work orders that define a PM Service value.

Edit Header Section

The Edit Header section shows an accordion menu with each Context that the header supports.

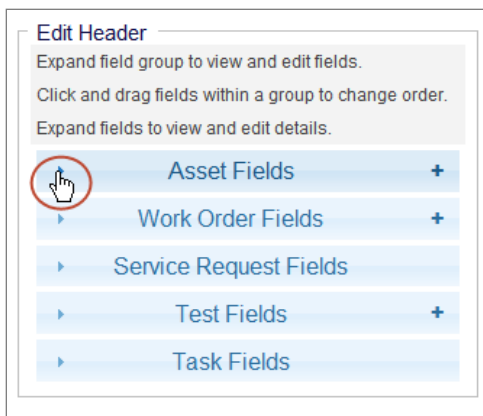
Edit Header

Expand field group to view and edit fields.
Click and drag fields within a group to change order.
Expand fields to view and edit details.

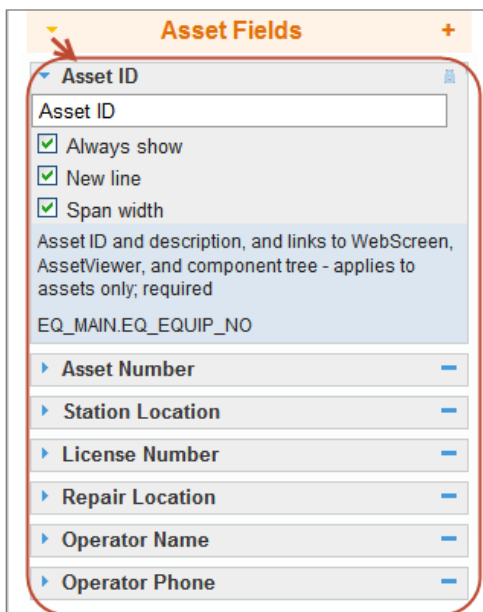
- ▶ Asset Fields +
- ▶ Work Order Fields +
- ▶ Service Request Fields
- ▶ Test Fields +
- ▶ Task Fields

1. Click on a context (Field group) to view and manage the fields within that group. For example, the "Asset" context shows all fields that are specific to assets (typically

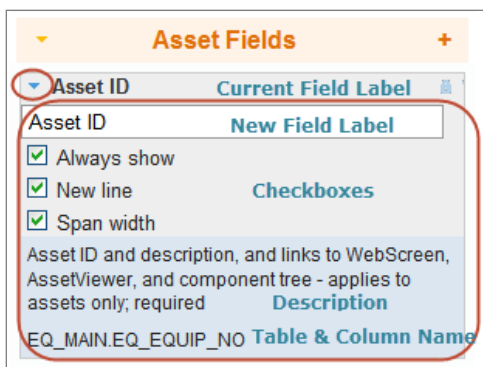
meaning fields available in EQ_MAIN and EQ_MAIN_ADDL tables, though not all columns are supported at this time).



The fields within the selected field group display.



- For each field, click the arrow icon to expand field details.

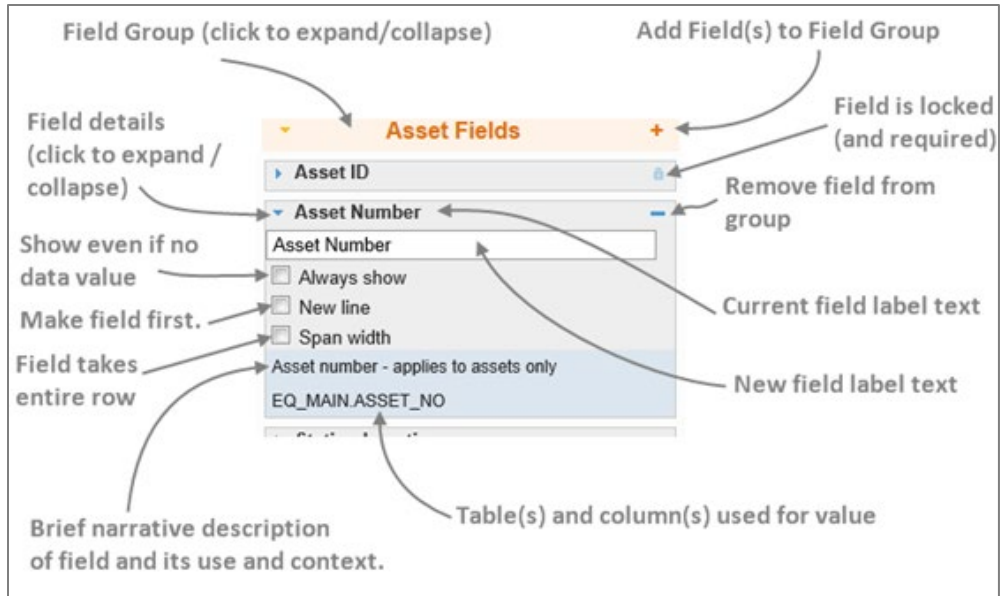


The following are displayed:

- Current field label text
- New field label text (textbox)
- **Always show** checkbox option
 - Checking this means the field will show even if value is empty or blank. Otherwise, field will only show if data is present.
 - Note that, unlike other changes, this option will not be preview-able because the preview always shows all fields already (since there is no live data to drive the header during editing). To see the results of "Always show" you must save the header profile and view the header on a page with actual data.
- **New line** checkbox option
 - Checking this means the field will always be in the left-most column and will not wrap via flow layout like default behavior does.
- **Span width** checkbox option
 - Checking this means the field will span the width and occupy the entire row.
- Brief description of field, its context, and any special rules.
- List of database table names and column names that are queried to get the value of this field.

Regarding Fields and Field Order

- Fields can be re-ordered via click and drag.
- Field groups are fixed and cannot be reordered. Fields will be ordered relative to the field group (Context) in which they occur. For example, it is not possible to move work order-level information above asset-level information.
- Fields can be re-named, and other properties modified, via editing the details information. Renaming applies only to the current profile, and can be used, for example, to show "Manufacture year" instead of "Model year" based on asset type ID.
- Fields can be added or removed via the plus or minus buttons.
- Fields that show a lock icon instead of a minus button are required for that context, and cannot be removed. (However, they can still be reordered via click and drag).



Regarding Label Text

Field's label text can be overridden, but defaults from corresponding user interface (UI) controls. To get the UI, save the current layout, and view the header via one of the pages with actual data on it. Right-click on the logo in the top left corner of the page, and choose "Show UI Ctrl Info." Then, shift-click on the label text of the header to get the UI ID and default text. Once the UI label text is overridden and/or the header profile saved, the text can only be edited via the Header Profile Detail page.

Portal-Wide Settings

This section of the page is where you determine the default values that will appear for the production managers.

- ✓ Whether you keep the default values or change them, it is necessary to save your selection for the portal to function properly.

Complete the following fields:

- **Require equipment history display first time PRODUCTION MANAGER views equipment unit:** Setting this default value determines whether the Equipment Unit History is automatically displayed for all production managers when a work order is created or viewed for the first time.
- **Suppress system added "... viewed equipment history." notes:** Setting this default suppresses the record of automated entries that are created when users view equipment history.

- **Limit to one work order open per asset:** This default setting creates a restriction for the number of OPEN work orders per equipment unit. If set, only one OPEN work order will be allowed per equipment unit. Therefore, no additional work orders will be allowed to be created against such unit. If not set, multiple OPEN work orders are allowed per equipment.
- **Force display of WO Messages while creating a new WO:** Setting this default will display the Work Order Messages while new work orders are created.
- **Default number of months to report for equipment history:** This default sets the number of months to display when equipment history is viewed by production managers.
- **Default number of work orders to report for equipment history:** This default determines how many work orders display when equipment history is viewed by supervisors.

Equipment History

Asset ID: **A-1002-CHEV-MALIBU02 2010 CHVRL MALIBU WHITE CHEV. MALIBU 4 DOOR SEDAN**

Asset Number: CHEV-MALIBU02 License Number: 54241X25

Repair Location: 1000 - FULL SERVICE SHOP

Current Filter

☐ Months of History to Display (0 = ALL) 0
 ☒ Number of Work Orders to Display (0 = ALL) 8
 Task ID (Wildcard = %)

History for all months

Work Order ID	WO Date	WO closed Date	Task ID	Life Meter	Meter Since Last PM	WAC	Employee
1000-2011-5	09/28/2011 12:24 PM		0000 - BODY & INSTRUMENTATION- GENERAL	3000		01	1000-11
1000-2011-5	09/28/2011 12:24 PM		02-004 - HOOD	3000		01	1000-11
1000-2011-5	09/28/2011 12:24 PM		A - PM-A	3000		0 01	1000-11
1000-2011-3	09/20/2011 11:48 AM		A - PM-A	3000		0 01	1000-11
1000-2011-3	09/20/2011 11:48 AM		P - POLLUTION (EMISSION INSPECTION)	3000		0	
1000-2010-97	02/26/2010 03:52 PM		3500 - BATTERY SYSTEM- GENERAL	2356		03	1000-10
1000-2010-9	02/23/2010 01:19 PM		A - PM-A	2356	644		
1000-2010-9	02/23/2010 01:19 PM		B - PM-B	2356	644		

Back Show All Months Printer Friendly

- **Date/Time values in 24 hour or 12 hour format:** This default indicates how to display date/time hour entries, e.g., 12 hour (1:29) or 24 hour (13:29) format.
- **Show work order comments or notes or both?:** In this section, you may choose to show work order comments, notes, or both by making the desired selection from the drop-down selection box.
- **Show Costs for:** This area determines the costs to display on the Work Order Postings page in the Summary Cost and Detail sections.

Equipment ID	MT-005 MT-005 2008 CHEVY VAN BLUE COURTESY SHUTTLE		
Asset Number	Station Location		
Work Order ID	LOC002-2008-12	Job Status	OPEN
Job Type	REPAIR	Technician	
Unit In	11/06/2008 11:52	Due	11/08/2008 11:52
Meter 1	500	Meter 2	5

Summary Cost Info			
Labor Hours	Labor Cost	Parts Cost	Commercial Cost
0.0	\$0.00	\$25.00	\$0.00

Comments

Work Order Postings

Labor
Parts
Cml
New Task

01-001 - AIR CONDITIONING ASSEMBLY							
WAC:							
Parts:	Date	Part ID	Description	WAC	Qty	Unit Price	Total Cost
	11/06/2008	PART001-0	ENGINE PARTS: PARTS USED TO REBUILD ENGINES		1.00	12.5000	12.50
Total							12.50

01-002 - HEATING & VENTILATING							
WAC:							
Parts:	Date	Part ID	Description	WAC	Qty	Unit Price	Total Cost
	12/02/2008	PART001-0	ENGINE PARTS: PARTS USED TO REBUILD ENGINES		1.00	12.5000	12.50
Total							12.50

- **Highlight Test Results button if result status is:** In this section, you may check the boxes to choose the statuses that determine when the **Test Results** button is highlighted.
- **Highlight WO Messages button if WO has these messages:** In this section, you may check the boxes to choose the messages that determine when the **Work Order Messages** button is highlighted.

Parts Actions Settings

This area allows you to determine Parts Actions Settings and Permissions.

Settings

- **Allow employees to search ALL PARTS regardless of supported locations:** Checking this box allows employees to search all the parts at all locations. The default is unchecked and will result in WHERE USED only returning parts that are stocked at the location.
- **Default Part Lookup Part ID search option:** This drop-down sets the default for the Part ID search option on the Part ID Lookup page. The drop-down list has the following choices:
 - **Include Xref (with the ...even if xref part ID exists as stock part option checked (ON)):** Searches the part IDs and the cross references and includes cross referenced parts that also are stocked as parts themselves. **Include Xref (with the ...even if xref part ID exists as stock part option unchecked (OFF)):** Searches the part IDs and the cross references and does not include cross referenced parts that are themselves stocked part IDs.

- **Only Xref:** Searches only the cross references
- **No Xref:** Searches only the part IDs and not the cross references
- **Manuf Part Only:** Searches only Manufacturer part IDs and not cross references or part IDs

- **Always search cross references if Include XRef is selected even if xref part ID exists as stock part:** Checking this box ensures that cross references are always searched even if the cross referenced parts also exist as a stock part ID. This setting applies to the part lookup search functionality and the setting default is not active.
- **Display parts quantity on hand as:** This setting indicates the quantity on hand as either the number of parts in stock or whether the item is available (Y/N).
- **Require approval for part returns:** Checking this box requires production manager approval for all part returns. **NOTE:** This setting must be the same in both the Shop Activity Technician and Supervisor portals for it to work properly.
- **Display Manufacturer Name and Manufacturer Part Number:** This setting allows display of part manufacturer and name in most places that part IDs are displayed in the portals.

Part ID Lookup

Stock Location: **ACA - ASSET CENTRAL ADMINISTRATION**

Search by Text

Part ID: contains Include Xref ☐

Description: contains

Product Category: contains 1

Search by Defined Lists

Task ID: ...

Please choose a Part ID - Parts found: 1376

Search:

Part ID	Suf	Description	Category	On Hand	On Order	Manuf Part No	Manufacturer
05EL01098	0	RADIATOR; RAD / CAC ASSY 2014 GILLIG EMP (NEW)	B.011	N/A	0.00	24143CR Cross References: 24143CR-0 BLAH-0 BLAHG-0	ALSTOM Cross References: ALSTOM ALSTOM ALSTOM
1009	0	GASKET-ENGINE; GASKET, ENGINE, ALL, CYLINDER HEAD WATER INLET/OUTLET ELBOW	B.310	N/A	0.00	Cross References: 5117993-0 5117993-0 5117993-0 5117993-0	Cross References:
1017	0	HOSE- SILICON(R; HOSE, SILICON(RUBBER), ID 2-3/8, LENGTH 2-3/4, ENGINE , OIL	B.310	N/A	0.00	Cross References: 23503674-0	Cross References:

Showing 1 to 1,376 of 1,376 entries

Part ID Lookup

Parts History - 1000-2011-3

Parts Posted

Part	Manuf Part No	Manufacturer
05046 -2: BATTERY PROTECT; BATTERY PROTECTOR		A - PM-A

Parts Requested

Date	Part ID	Manuf Part No	Manufacturer	Description	Status	
01/18/2012 13:43	05046-2			BATTERY PROTECT; BATTERY PROTECTOR	COMPLETED	4
01/10/2012 13:32	5281090-0		MOPAR	FILTER; FILTER	ORDERED	1
01/10/2012 13:30	P-1000-0			OIL FILTER; OIL FILTER	PENDING	1
12/09/2011 13:09	P-1002-0			GASKET; GASKET	COMPLETED	1

Parts History

Post Work Order Parts

- **Part Actions to be handled through external system URL:** This setting allows the option to override the part actions links with a link to an outside URL sending with it the work order ID to facilitate ordering materials for work orders.
- **Configured Parts Catalog:** This setting allows you to select the tab that your Parts Catalog portal is linked. It determines where to go when the **Inventory Parts Catalog** button is pressed.

Permissions



For the Part Actions Permissions, it is recommended that you keep the All Users default if all users have permission regardless of group permission.

Set the following permissions to [All Users (default)] if all users have permission regardless of their group membership:

- **Allow users in this group to request parts:** This setting determines the group that may request parts.
- **Allow users in this group to issue parts:** This setting determines the group that may issue parts.
- **Allow users in this group to issue NFI (not from inventory) parts:** This setting determines the group that may issue NFI parts.



Note: This group must **also** be allowed to issue parts.

PM Check List Reporting Settings

PM Check List Report: This field specifies the report that is run when the **PM Checklist** button is pressed.

- ✓ If customizing this report, please be aware that the following case sensitive parameters are used to generate this report: WorkOrderLoc, WorkOrderYr, WorkOrderNo, and PMService.

➡ Click the **Restore Default** button to reset to the default report.

PM Check List Items Completion: This field specifies whether you ALWAYS REQUIRE, NEVER REQUIRE, or PROMPT users for completion of check list items.

Settings for Work Order Main Page

This section of the page is where you decide on additional settings for the Work Order Main page.

Current “Print Work Order” Report: This field specifies which report is run when the **Print Work Order** button is pressed.

- ✓ If customizing this report, please be aware that the following case sensitive parameters included in this report are WONum, WOYear, and Location.
- ✓ Click the **Restore Default** button to reset to the default report.

Equipment History Report: This field specifies which report is run when the **Equipment History Report** button is pressed.

- ✓ If customizing this report, please be aware that the following case sensitive parameters included in this report are EqID and Years.

➡ Click the **Restore Default** button to reset to the default report.

- ⚠ Access to the **Finish Work Order** button is controlled through the GUI. The button is hidden or disabled depending on whether the user has rights to view or edit the control, respectively.

Settings for Work Order Detail Page

This section of the page is where you decide on additional settings for the Work Order Detail page.

Current Report Print Work Order: This field specifies which report is run when the **Print Work Order** button is pressed.

- ✓ If customizing this report, please be aware that the following case sensitive parameters included in this report are WONum, WOYear, and Location.

➡ Click the **Restore Default** button to reset to the default report.

Settings for Work Order Posting Page

This section of the page is where you decide on additional settings for the Work Order Posting page.

Current Report Print Work Order: This field specifies which report is printed when the **Print Work Order** button is pressed on the Work Order Posting page.

- ✓ If you decide to change the default report, please be aware that it only takes three inputs: LOCATION, WOYEAR, and WONUM.

Settings for New Work Order Page

Do not use FA defaulted PM Service for new PM WO's: This setting determines whether or not the FA defaulted PM Service is used for new PM work orders. Check the box if you do not want to use the default PM Service on new PM work orders.

1. When you are finished setting the default values and settings, click **Save**.
2. After configuring the Production Manager Portal, exit your browser and open a new browser window prior to using the Production Manager Portal tab to view or update data.

For additional information about the Production Manager Portal, please refer to the Shop Activity Production Manager Portal User Guide.