

Version 25



Trapeze

Enterprise Asset Management

Shop Activity – Technician

Administrator Guide

Trade Secret | February 2025

© 2025 Trapeze Software ULC, its subsidiaries and affiliates (collectively “TSU”). All rights reserved.

Trapeze Software ULC (“TSU”) Proprietary and Confidential: Information contained in this document is proprietary to TSU and its subsidiaries and may be used or disclosed only with written permission from TSU. This guide, or any part thereof, may not be reproduced without the prior written permission of TSU. The recipient acknowledges and agrees that disclosure of this document to recipient, and its use, are subject to the terms and conditions specified in their relevant software license agreement, software maintenance agreement, and/or non-disclosure agreement (“Governing Agreement”) under which this document was disclosed. This document is for internal use only in conjunction with TSU products. This document may not be modified in any way.

All other trademarks, registered trademarks, product names and company names or logos mentioned are the property of their respective owners.

Except as may be provided in the Governing Agreement, TSU and its affiliates, subsidiaries, officers, directors, employees, and agents provide the information contained in this manual on an “as-is” basis and do not make any express or implied warranties or representations with respect to such information including, without limitation, warranties as to non-infringement, reliability, fitness for a particular purpose, usefulness, completeness, accuracy or currentness. TSU shall not in any circumstances be liable to any person for any special, incidental, indirect or consequential damages, including without limitation, damages resulting from use of or reliance on information presented herein, or loss of profits or revenues or costs of replacement goods, even if informed in advance of the possibility of such damages.

TSU reserves the right, to be exercised at its sole discretion and without notice, to change, modify or adapt the contents of this edition in order to accurately reflect any future upgrades to the TSU proprietary software and/or hardware. In the event of such changes, TSU expects, but does not represent or guarantee, that this current edition will continue to remain reasonably accurate insofar as it describes the basic functions of the TSU proprietary software and/or hardware. Furthermore, based on your system settings, certain functionality, such as application screens, may not function exactly as shown or described in this guide.

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 Technician - Administrator Guide

Version 25.x

February 2025

Contents

1. Overview.....	1
Requirements.....	2
Assumptions	2
2. Install/Upgrade Steps	3
Install Module.....	3
Add Shop Activity Supervisor Portal Tab to Web Modules	3
Upgrade an Existing Web Modules Instance.....	3
Add a Shop Activity Supervisor Portal Tab to Web Modules	3
3. Configure the Portal	4
Location Settings Profiles	5
Asset Type Profiles	6
Edit Header Layout button:.....	6
Add a New Profile or Edit an Existing Profile	7
The Header Profile Detail Edit page	8
Technician Portal Settings Section	18
Common Settings.....	21
Commercial Request Permissions	27
Work Deferral Settings	27
Service Request Deferral.....	28
Portal-wide Settings	28
Highlight Test Results button if result status is.....	30
Highlight WO Messages button if WO has these messages.....	31
Calendar and Scheduling	32
Parts Actions Settings	32
Settings	33
Parts Actions Permissions.....	35
PM Check List Reporting Settings	35
Settings for Work Order Main Page	35
Settings for Work Order Details Page	36
Settings for New Work Order Page.....	36
Saving Your New Settings.....	36

1. Overview

The Shop Activity Technician Portal is designed to provide your organization's technicians with a single, easy-to-use portal to all of the screens and functions required during their workday.

Technicians can use the Shop Activity Technician Portal to:

- View work assigned to them
- Log on and off of direct and indirect tasks
- View equipment repair history, service requests, and messages
- Request or post parts for work orders and view status of past requests and postings
- Place work orders into and out of delay status
- Add comments and notes to work orders
- Create and update test results related to work orders
- Complete PM checklists for PM and inspection services
- Enter complaint, cause, and correction detail (3 C's) for repairs performed
- Create new work orders as needed
- Place work orders into WORK FINISHED status
- Add/modify related tasks
- Add/manage service requests to work orders
- Print work orders
- Post data to work orders after-the-fact (i.e., 3 C's, labor, parts, etc.)

The look and feel of the Shop Activity Technician Portal was designed specifically to make data entry as easy as possible while maximizing its 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

 Internet Explorer 8 (and up) Users: When using IE8 to add work files via the Technician or Work Management portals, the file path is replaced with “FAKEPATH.” As a result, the file cannot be opened because the incorrect file was saved to the database. To resolve this issue, perform one of the following workarounds:

- Add the Web Modules website to the Trusted Sites list via **Tools > Internet Options > Security > Trusted Sites > Add** (recommended)
- Enable the local file path option for the security zone.

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 cannot 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. Install/Upgrade Steps

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 Supervisor 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 Supervisor Portal Tab to Web Modules

To make the functions of the Shop Activity Technician 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 Supervisor Portal Tab to Web Modules

If you haven't previously added a tab to make the functions of the Shop Activity Technician 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.

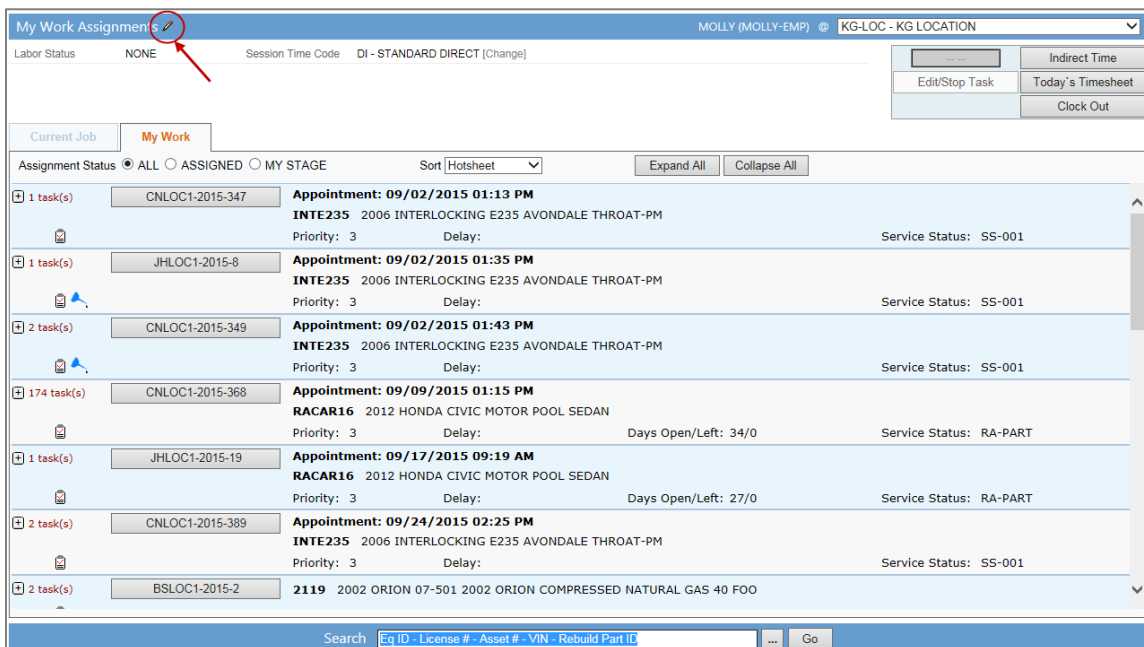
3. Configure the Portal

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

Depending on your settings, the Main Technician Portal page or the Clock In page displays.

To configure the Technician Portal settings:

1. Click on the **Edit**  icon next to the Technician Portal title bar.



The screenshot displays the 'My Work Assignments' interface. At the top, there's a header bar with the title 'My Work Assignments' and a red circle highlighting a pencil icon (the 'Edit' button). Below the header, there are tabs for 'Current Job' and 'My Work'. The 'My Work' tab is active, showing a list of assignments. Each assignment row includes a task ID (e.g., CNLOC1-2015-347), an appointment time (e.g., 09/02/2015 01:13 PM), a vehicle description (e.g., 2006 INTERLOCKING E235 AVONDALE THROAT-PM), priority, delay, and service status (e.g., SS-001). The bottom of the page features a search bar with a dropdown menu showing options like 'Eq ID', 'License #', 'Asset #', 'VIN', and 'Rebuild Part ID'.

The Technician Portal Settings page displays.

Location Settings Profiles

Work Order Location Settings

Asset Type Profiles

Edit Header Layout

Technician Portal Settings

My Work Orders filters

Default	Show Filter
☒	☒ ALL
☐	☒ ASSIGNED
☐	☒ MY STAGE

Select the Hot Sheet sort order

Available

Sort Order

Parts Ready

Assigned To Me

Appointment

Current Stage

Wac Final Status

Priority Rank

Location

WO Year

WO Number

Equipment

Allow Techs to Unassign Checked SRs
☒

Warn user if the current task is the last task and WO should be finished
☒

Default WAC for tasks modified via Modify Current Task

10 - INSPECTED

Allow techs to enter information when stopping an indirect task
☒

Hide delay button (disallow technicians from starting/stopping delay on WOs)
☐

This page is divided into several sections: Location Settings Profiles, Asset Type Profiles, Technician Portal Settings, Common Settings (supported by Technician and Supervisor portals), Work Deferral Settings, Service Request Deferral, Portal-wide Settings, Parts Actions Settings, PM Checklist Reporting Settings, Settings for Work Order Main page, Settings for Work Order Detail page, Settings for Work Order Posting page, and Settings for New Work Order page.

For more information on these items, continue on to the next section below.

2. Change the settings as needed and click **Save**.



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

Edit Header Layout button:

The Shop Activity **Edit Header Layout** button is a 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** to open the Asset Type Page Header Profiles page where you may add, edit, or delete different profiles.

The list of currently-defined header profiles and their associated Asset Types display.

📅 Use the Search field to narrow the list to only display profile names and locations that contain the search characters you enter.

Asset Type Page Header Profiles	
Search:	
	Profile Name
Edit	Default Settings

*There is always at least one profile available, which is named **Default Settings**. This is used when there is no other profile to apply. Because production runs do not have an 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](#)

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

Asset Type Page Header Profiles

Search:

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

[New Header Profile](#)

[Back](#)

Add a New Profile or Edit an Existing Profile

When adding a new profile or editing an existing profile, use the Asset Type Page Header Profiles page. Find this page by clicking the My Work Portal edit pencil, then click **Edit Header Layout**.

To add or edit a profile:

 Click **New Header Profile** to add a new profile, or click **Edit** to edit an existing profile.

Asset Type Page Header Profiles

Search:

	Profile Name	Asset Type(s)
Edit	Default Settings	
Edit Delete	RG LINEAR	LINEAR
Edit Delete	RG LINEAR	LINEAR
Edit Delete	RG LINEAR	LINEAR
Edit Delete	Test	FACILITY

[New Header Profile](#)

The Header Profile Detail Edit page displays.

The Header Profile Detail Edit page

From this page, you can choose one or more asset types to assign to the profile.



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

Header Profile Detail

Profile Name RG LINEAR

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	Station Location	Station Location
Asset Number	Asset Number	Repair Location	Repair Location
License Number	License Number	Operator Phone	Operator Phone
Operator Name	Operator Name	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
Work Project	Work Project	Projected Completion Date	Projected Completion Date
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
SR Work Project	SR Work Project		
Test ID	Test ID	Test Type	Test Type
Task	Task		

Back

Save

Select Asset Types to add to the profile as desired.

Header Preview Section

From the Header Profile Detail page, you can customize header profiles. You can also preview the header in the Header Preview section to the right as you go.

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
Work Project	Work Project	Capital Project	Capital Project
Projected Completion Date	Projected Completion Date		
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
SR Work Projects	SR Work Projects		
Test ID	Test ID	Test Type	Test Type
Task	Task		

Because not all fields and context are available at the same time, you can choose the contexts to preview. For example, you can see what the header will look like for the Task Detail page, a service request, a work order, an asset, etc.

You can see possible header preview options by changing the value of the **Show all fields** drop-down list 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 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 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			
Current Work Delay	Current Work Delay	Service Status	Service Status		
Meter 1	Meter 1	Meter 2	Meter 2		
Contact	Contact	Contact Phone	Contact Phone		
Work Project	Work Project	Capital Project	Capital Project		
Projected Completion Date	Projected Completion Date				
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		
SR Work Projects	SR Work Projects				
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 (Non-linear Asset)

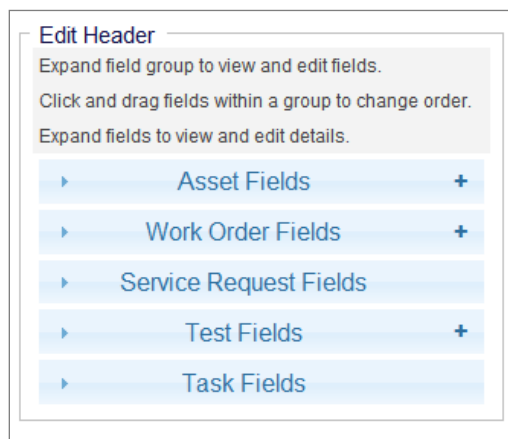
Asset ID	Asset ID		
Asset Number	Asset Number	Station Location	Station Location
License Number	License Number	Repair Location	Repair Location
Operator Name	Operator Name	Operator Phone	Operator Phone
Work Order ID	Work Order ID	Job Status	Job Status
Job Type	Job Type	Technician	Technician
PM Service	PM Service	PM Scheduled	PM Scheduled
Unit In	Unit In	Due	Due
Current Work Delay	Current Work Delay	Service Status	Service Status
Meter 1	Meter 1	Meter 2	Meter 2
Contact	Contact	Contact Phone	Contact Phone
Work Project	Work Project	Capital Project	Capital Project
Projected Completion Date	Projected Completion Date		
Service Request ID	Service Request ID	Incident ID	Incident ID
SR Symptom	SR Symptom		
SR Task	SR Task		
SR Contact Name	SR Contact Name	SR Contact Phone	SR Contact Phone
SR Work Projects	SR Work Projects		



Note: 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 PM Service will, by default, only show for work orders that define a PM Service value.

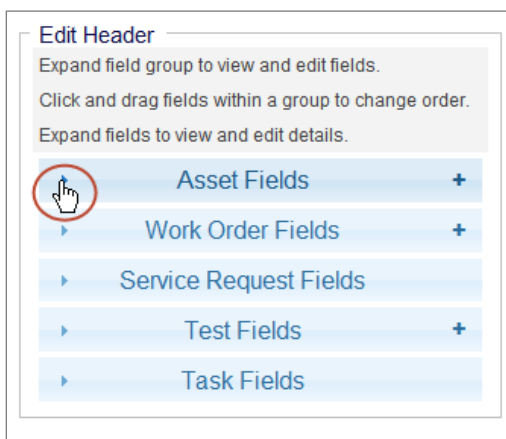
Edit Header Section

The Edit Header section shows a menu with each context that the header supports.



To view and edit the header fields:

1. Click on one of the options 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).



2. Click the Field Group to view and manage the fields within that group

The fields within the selected field group display.

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

4. For each field you click, 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, the field will only show if data is present.
 - Note that, unlike other changes, you will not be able to preview this option 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.
 - A brief description of the field, its context, and any special rules.
 - A list of database table names and column names that are queried to get the value of this field.
5. You can also edit other items in this menu. The following is more information regarding fields and field order:
- You can click and drag fields to reorder them.
 - 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.
 - You can rename fields and modify other properties when 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 the asset type ID.
 - You can add or remove fields with the plus or minus buttons.

To add fields to the header:

1. Click the **+** to open the **Select fields to add** dialog.
2. Check the boxes to select the fields to add.
3. Click **Add Selected Fields** to add the fields to the Header Profile.

The new fields display in the Header Preview area.

4. Click **Save** to save your additions.

Other Header Fields Information

Changes to the Work Order Main Page

On the Work Order Main page, Hours Completion and Work Completion are not defaulted to show, but once you have added them, they will display in the list.

After adding the fields to the Work Order Header, the Work Order Main page will display the fields in the header. The **Remaining Hours** column in the Tasks section shows the hours left on the task as indicated in the screenshot below.

The screenshot displays the 'Work Order Main' page. At the top, there are fields for Asset ID (HGCAR1: E1 1753 NEW FLYER C40LF 2001 NEW FLYER COMPRESSED NATURAL GAS 40), Station Location (RGLOCS - RG LOCATION S), Repair Location (RGLOCS - RG LOCATION S), and a search icon. Below these are fields for Operator Name, Work Order, Job Type, PM Schedule, Due, Meter 1, Contact (RG OPERATOR1), and Contact Phone (11). A status message indicates 'No employees currently working'. Two callout boxes explain the 'Hours Completed' and 'Tasks Completed' fields. The 'Hours Completed' field shows '1.00 / 4.00 (25.00%)' and the 'Tasks Completed' field shows '1 / 2 (50.00%)'. Below these is a 'Tasks: 2' section with a table showing task details. A third callout box explains the 'Hours Left' column. To the right is an 'Actions' panel with buttons for Main Page, Start Delay, View/Edit Detail, Finish Work Order, Part Actions, Comments, Equipment History, Test Results, Related Files, Messages, Print Work Order, Component Warranty, Commercial Work, Postings, and Relationships. A 'Notes' section is at the bottom.

Hours completed shows hours logged against all tasks on WO over the number of estimated hours to complete all tasks on WO. Hours completed percentage also displays.

Tasks completed shows the number of tasks completed over the number of tasks on the WO. Tasks completed percentage also displays.

Hours left shows hours remaining on task. Calculated by taking Estimated Hours for task - Labor posted to task. A completed task shows no Hours Left. A negative value indicates more labor has been posted than estimated.

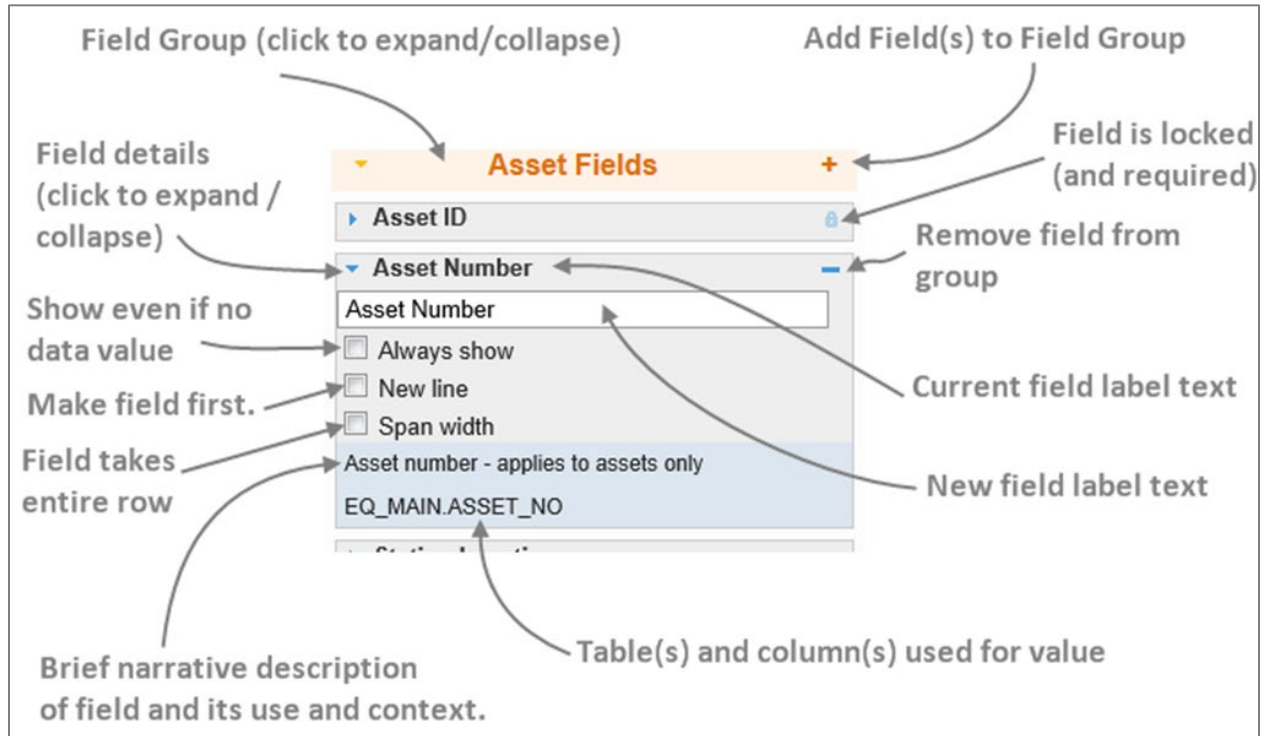
Task ID	WAC	Hours Left
006 - BRAKES		0.00
A - PM SERVICE A		3.00

- **Hours Completed** shows the total posted time of all tasks on work order over the total of all the estimated hours for the tasks on the work order.
- **Tasks Completed** shows the number of completed tasks on the work order over the number of tasks on the work order. Percentage Completed is also shown for hours completed and hours.

 Note: If there are no estimated hours for the tasks the label will be hidden.

To determine the total hours to complete the work order for each task, it takes the hours logged against the task and the estimated hours and it uses the *greater* value for the particular task. In the example above, if you estimated 1 hour for the brakes task and it ended up taking 2 hours, it will update the total to 5 hours (Hours Completed would read 2/5).

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:

A field's label text defaults from corresponding user interface (UI) controls, but can be overridden.

To get the UI

1. Save the current layout
2. View the header via one of the pages with actual data on it.
3. Right-click on the logo in the top left corner of the page.
4. Select **Show UI Ctrl Info**.
5. 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 you have saved the header profile, the text can only be edited via the Header Profile Detail page.

Technician Portal Settings

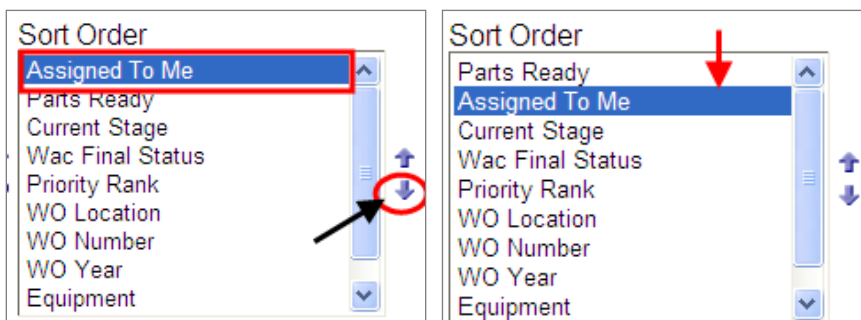
This section of the page is where you determine the default values that will appear for the technicians.

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

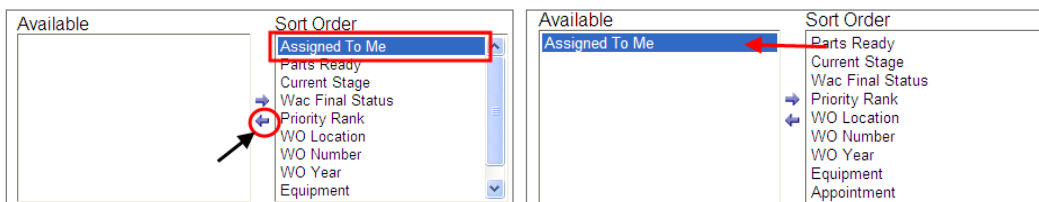
Complete the following fields:

- **My Work Orders filters:** This area allows you to set the default view for the My Work Orders list for technicians and determine the assignment status filters that show for users on the My Work Orders tab (All, Assigned, or My Stage). Check the boxes to determine the default view and the assignment status filters that display.
- **Select the Hot Sheet sort order:** This area allows you to determine the sort order for the Hot Sheet. Select an item in the Sort Order list and click the up and down arrows to move the item up/down in the order. Click the left arrow to remove the item from the sort and place it in the Available list. Select an item in the Available list and click the right arrow to move it to the Sort list.

Example: Moving items up/down in the Sort Order:



Example: Removing items from the Sort Order to the Available List:



- **Users can unassign service requests from work orders:** This default determines if technicians may unassign checked service requests.
- **Warn user if the current task is the last task and WO should be finished:** This setting determines whether the user is warned when the current task is the last task and the work order should be finished. The warning displays on the Work Order Task Detail

page when the user clicks on the **Edit/Stop Current Activity** button to stop the current task from being performed. The warning reads, "If you are completing this task, the WO is ready to be Finished."



Note: This setting only applies for locations that are set to require Final WAC at POST or FINISH. This setting does not apply to Internal Rebuild work orders as they do not currently support WAC's.

- **Default WAC for tasks modified via Modify Current Task:** This WAC applies to modified tasks only.
 - If you leave the field blank, the technician is required to choose a WAC for any modified tasks on the work order before finishing the work order.
 - Select a default to have the Shop Activity Technician Portal automatically populate the selected WAC on work orders for modified tasks. Select a default WAC from the drop-down selection list.
- **Allow techs to enter information when stopping an indirect task:** This default determines whether technicians may enter information when stopping indirect tasks.
- **Hide delay button (disallow technicians from starting/stopping delay on WOs):** Checking this box prevents technicians from being able to start/stop delay on work orders.
- **Require viewing timesheet on clocking out:** This default setting determines whether technicians are required to view their timesheet when clocking out.
- **Allow Labor on Work Orders in Delay:** This default determines whether labor may be performed on work orders in Delay.
- **Allow parts transactions:** This default enables the feature that lets technicians view the **Part Actions** button from the Work Order Main page in the Technician Portal.
- **Allow Technicians to View Work Finished Work Orders:** This setting is checked by default and allows technicians to view work finished work orders on the My Work tab, ALL assignment status in the Technician Portal.
- **Allow Technicians to Close work orders:** This default determines whether technicians are allowed to close work orders and shows/hides the Close WO button.
- **Allow Technicians to Exceed location labor hours limit:** This default determines whether technician may work more hours than their typical work day hours.
- **Hide PENDING work order in My Work:** This setting is unchecked by default. Check this box in order to prevent pending work orders from displaying in a technician's My Work queue.
- **Restrict edit of Service Request Symptom & Complaint to creator only:** When enabled, this setting restricts editing of a Service Request to the person who created it.

- **Prompt for delay code when last technician jobs off work order:** Check this option so that when the last technician jobs off an open work order that is not in delay, a warning message displays to let the technician know this is the case.

Common Settings

These settings are supported by Technician, Supervisor, and Work Management portals.

- **Require a new note when rejecting Service Requests:** This setting determines if a note is required for explanation when rejecting a service request.
- **Marker and Offset Information required when stopping labor:** This setting determines if the marker and offset information is required when stopping labor on a linear work order.
 - This common setting on a linear work order supports real-time labor capture. If checked, the technician must enter marker information via stop/edit task. Otherwise, marker information is defaulted to marker start/end automatically.

The screenshot shows the 'Work Order Task' form. The top section contains fields for Asset ID, Repair Location, Work Order ID, Job Status, Job Type, Unit In, Due, Work Order Offset, Projected Completion Date, Service Status, Tasks Completed, Service Request ID, SR Symptom, SR Task, and Task. Below this is a yellow banner with the message 'Value is required for: From/To Marker info'. The 'C/C/C Information' section includes 'Fail / Cause Code', 'Correction Performed', and 'COVERED IN FILTH'. The 'Update Task Fields' section includes 'WAC', 'Final Status', 'From Marker', 'To Marker', 'Offset', and 'Work Class'. The 'Update Work Order Fields' section includes 'Add a new note'. A red box highlights the 'From Marker' and 'To Marker' fields, which are both set to 37900, and their respective 'Offset' fields, which are set to 8.0000 and 18.0000.

- **Use technician clock in/out:** This default value determines whether the technician is required to clock in/out via the portal. When this field is checked, when technicians access the Technician Portal, the technician must first clock in to let the system know they have shown up for work.

The screenshot shows the Technician Portal login screen. The header is 'Tech - MollyT'. The main content area says 'Welcome, MOLLYT - MOLLY' and 'You are clocked out. Please press CLOCK IN to clock in.' Below this is a message: 'This process does NOT clock you in for payroll. Clock in on the payroll time clock if you have not yet done so.' There are two dropdown menus: 'Session Time Code' set to 'DAY SHIFT' and 'Session Location' set to 'LMLOC1 - LM LOCATION 1 - SHOP'. At the bottom, there is a 'Clock In' button, which is highlighted with a red circle and a red arrow pointing to it.

If using this setting, technicians should then clock out at the end of each day.

The screenshot shows the 'My Work Assignments' portal. At the top, there's a header with 'My Work Assignments' and a user profile 'MOLLY (MOLLY-EMP)'. Below this, there's a section for 'Current Job' and 'My Work'. The 'My Work' section displays a list of tasks with details like 'Appointment', 'Task', 'Equipment', 'Priority', 'Delay', and 'Service Status'. A red circle highlights the 'Clock Out' button in the top right corner of the interface.

- Number of hours to report back for timesheets:** This default sets the number of hours to display back from current time for timesheet entries when technicians click on the **"Today's Timesheet"** link on their main page. This allows for correct handling for shifts that span midnight. For example, if the setting is 18, the sheet will display all labor that falls within the last 18 hours.
- Allow Supervisors / Technicians to edit their own Timesheet:** This setting allows supervisors and technicians to edit their own timesheet entries on the Timesheet for review timesheet summary page.
- Integrated Capital Project Portal Tab Name:** This setting determines the tab name for the Integrated Capital Project Portal tab. If your organization uses this portal, select the name from the drop-down box.
- Integrated Timesheet Portal:** Set this option to Timesheet to show the Misc columns from the Timesheet portal when working with timesheets in this portal. The Timesheet Review button will also not display if there is no set portal for timesheets.
- Default Work Accomplished Code (WAC) for PM Tasks:** This is a required setting and the administrator has to configure this setting to the desired default work accomplished code (WAC) for all work performed to PM tasks. This WAC applies to work orders for PM tasks only. The WAC determines the work performed to accomplish the task.



Note: A WAC must be created with for this with the **Deferred maintenance** checkbox checked on the Basic Info tab of the Work Accomplished Codes screen. It

is advised that this WAC is not set to support all asset categories (**Supports all asset categories** checkbox on the Asset Categories tab of the Work Accomplished Codes screen).

- When you select a default, the Shop Activity Technician portal will automatically populate the selected WAC on work orders for PM tasks. Select a default WAC from the drop-down selection list.



Note: Service requests are created or not created when closing a work order with a PM task based on the following options:

- To create service requests: On the Tasks – Primary Information screen, Basic Info tab, enter a repair task in the **Repair task ID associated with PM task** field.
- To not create service requests: Ensure that the PM tasks have the **Repair task ID associated with PM task** field left blank. This setting is found on the Tasks – Primary Information screen, Basic Info tab.
- **Equipment/Part Lookup search string:** This setting determines the text string for the label of the equipment/part lookup search. The Restore Default button restores the search label to the original default text string.
- **Search to include the following fields:** Check the boxes to include the various fields in the search string (Equipment ID, License #, Asset #, VIN (Serial Number), Rebuild Part ID, and Inactive Assets).



Note: Inactive assets default as unchecked.

Search to include the following fields:

- ☒ Equipment ID
- ☒ License #
- ☒ Asset #
- ☒ Asset Address
- ☒ VIN (Serial Number)
- ☒ Rebuild Part ID
- ☒ Inactive Assets - Minimum characters to search inactive
- ☒ Work Order ID

- To include inactive assets in your searches, check the **Inactive Assets** box and enter the minimum number of characters to search for inactive assets (defaults to 5). The following screenshot shows an example of minimum characters to search inactive is 3.

Search to include the following fields:

- ☒ Equipment ID
- ☒ License #
- ☒ Asset #
- ☒ VIN (Serial Number)
- ☒ Rebuild Part ID
- ☒ Inactive Assets - Minimum characters to search inactive

- a. After setting the minimum number of characters for the **Search** field on the various Shop Activity pages, you can search for inactive assets. When you enter a search into the **Search** field with at least that many characters and click **Go**, the Choose Equipment page displays the list of **Active and Inactive** assets that begin with the specified characters. If you enter fewer than the minimum number of characters, the results display only the **Active** assets.

Found 111 Equipment Units Matching RA						
Equipment ID	Asset Number	License Number	Serial Number	Year	Make/Manufacturer	Model
0001850			RA-C-00002	2005	DETROIT DIESEL	S50CNG
0001884			RA-2-SN-RCPT-0002	2014	DETROIT DIESEL	S50CNG
0001885			RA-2-SN-RCPT-0003	2014	DETROIT DIESEL	S50CNG
0001886			RA-2-SN-RCPT-0004	2014	DETROIT DIESEL	S50CNG
0001888			RA-SN-11	2014	DETROIT DIESEL	S50CNG2
0001929			RA-SN-04062015-1	2014	DETROIT DIESEL	S50CNG2
0001934			RA-SN-063020151158-1	2014	DETROIT DIESEL	S50CNG2

Found 4 Parts Matching RA	
Part ID	Description
RA1001-1	PART
RAPART-1000	REBUILT
RAPART052-1	PART
RASERIALIZED-1	REBUILT

Back

- b. Selecting an **Active** Equipment Unit from the list displays the Equipment Management page as shown in the following screenshot. (Refer to the Equipment Management section in the *Shop Activity Technician User Guide* for more information about this page.)

Current and Pending Work

Asset ID: **RCPTRA-SN-RCPT-0001** RA-SN-RCPT-0001 2005 DETROIT DIESEL S50CNG SERIES 50 DETROIT DIESEL GAS ENGINE

Repair Location: BUS093 - PERRY MAINTENANCE MAIN

Work Orders: 2 Expand All Collapse All

Open Work Orders

RA L-1-B A-2014-57	Status: OPEN	Job Type: REPAIR	Priority: 44
	Service Status:	Repair Reason: Q1 - QA REPAIR REASON - BREAKDOWN	Delay:

Pending Work Orders

BUS093-2014-25	Status: PENDING	Job Type: REPAIR	Priority: Q2
	Service Status:	Repair Reason: C - WEAR AND TEAR	Delay:

Pending Service Requests: 1

Task	Symptom	Entered When	Entered By	Priority
No Comment	QA-SYMP-CRACK - A CRACK HAS DEVELOPED	09/05/2014 03:41 PM	RANNIS	3

Equipment: ... Search

Back Repair History New Service Request New PM WO New Repair WO

- c. Whereas, selecting an **Inactive** Asset from the list displays the Equipment History page as shown below. (Refer to the Equipment History page section in the *Shop Activity Technician User Guide* for more information about this page.)

Equipment History

Asset ID: **PB-FAN-38** CNG-EF-26 LOCATED IN BUSWASH

Asset Number: CNG-EF-26 Station Location: BS4171 - FMB40 WESTLINE-BLDG & SUPPOR

Repair Location: BS4171 - FMB40 WESTLINE-BLDG & SUPPOR

Current Filter

☒ Months of History to Display (0 = ALL) Task ID (Wildcard = %)

☐ Number of Work Orders to Display (0 = ALL) Apply Filter Reset Filter

No work order history for PB-FAN-38 within the last 12 months.

Work Order ID	WO Date	WO Closed Date	Task ID	Life Meter 1	Meter Since Last PM	WAC	Employee
---------------	---------	----------------	---------	--------------	---------------------	-----	----------

Back Show All Months

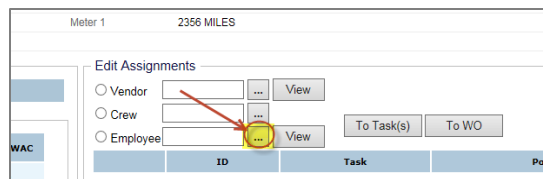
- **Use Asset Chooser instead of Choice-list:** This setting enables the portals use the Asset Chooser instead of the choice-list if checked. The Asset Chooser allows you to select assets from several different base search options. For more information on the Asset Chooser, refer to the *General Application Information Guide*. The default for this field is checked (to use the Asset Chooser).
- **Use Employee Chooser instead of Choice-list:** This setting determines if the portals use the Employee Chooser instead of the choice-list.



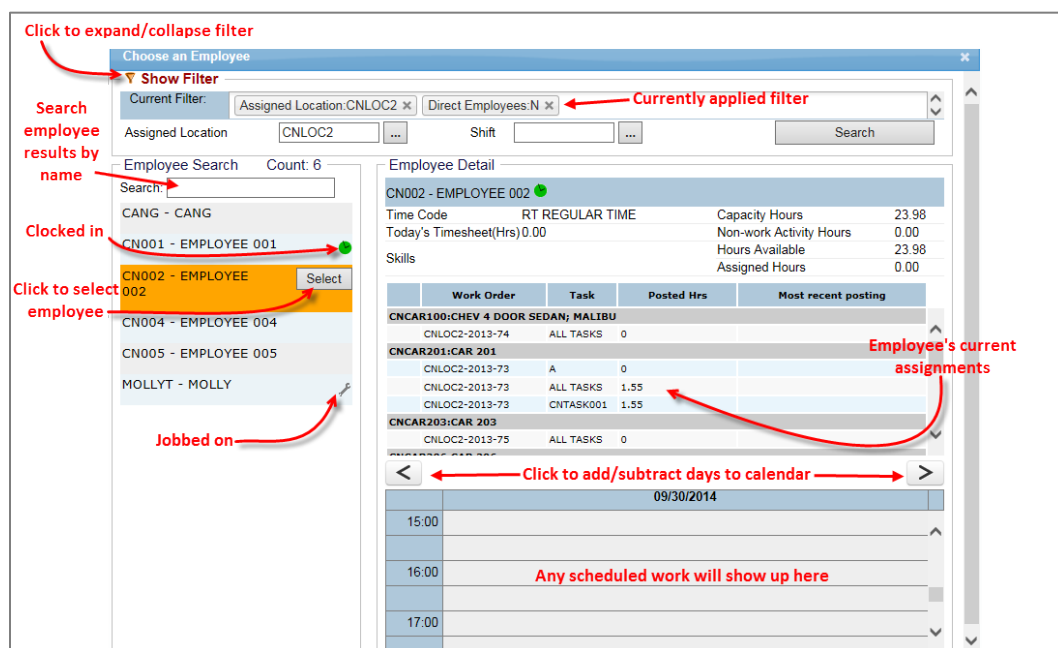
Note: The default is checked (to use the Employee Chooser).

The Employee Chooser allows Supervisors to easily select Employees based on their current work load. The Employee Chooser is supported in the following areas: Work Order Assignment Detail, Shop Calendar, and Resource Hours Change.

- i. To open the Employee Chooser, click the choice-list button as you would for any other choice-list.



The following is screenshot of the Employee Chooser with basic functionality noted:



- ii. After opening the Employee Chooser, the filter collapses and the **Assigned Location** field defaults. This is set in the Employees – Primary Information screen, Assignment Info tab, with the **Supported locations** settings.
 - iii. If Shop Scheduling is supported, capacity hours, non-work activity hours, hours available, assigned hours and the day calendar will be visible. If not, then these fields are hidden.
 - iv. The **Search** field (on the left) allows the user to quickly search the list of filtered Employees. Selecting an employee option selects the appropriate employee and retrieves their detail.
- **Use Symptom Chooser instead of Choice-list:** This setting determines if the portals use the Symptom Chooser instead of the choice-list.

- **Use Vendor Chooser instead of Choicelist:** This setting will use the vendor chooser instead of a regular vendor choice-list. This choose includes filters and more in-depth searching for vendors and uses wildcards.
- **Use slider for linear reference offsets:** This setting allows you to use a slider when referencing linear offsets.
- **Enable linear asset attributes viewer when defining work:** This setting allows you to turn on the linear asset viewer slider which allows you to slide the beginning and end points of a linear asset to choose what you need to work on. If this box is disabled, the linear slide will be hidden on the Service Request Detail and Work Order Create pages.
- **Create new appointment for new WOs with estimated appointment hours:** This setting allows you to determine if a new appointment is automatically created for new work orders with estimated appointment hours.



Note: Shop Scheduling must be active for this to work.

- **Display Jurisdiction (For Authenticated Users):** Check this option to show the Jurisdiction field for authenticated users
- **Jurisdiction List Type ID:** Select the list type ID for the correct list of jurisdiction choices (created on the Custom List Values screen).

Commercial Request Permissions



Note: For the Commercial Request Permissions, we recommend that you keep the **[All Users (default)]** if all users have permission regardless of group permission.

- Allow users in this group to **request commercial work:** This setting determines the group that may make commercial requests.
- Allow users in this group to **post commercial work:** This setting determines the group that may post commercial work.

Work Deferral Settings

- **Allow Transfer/Deferral of Work Orders? (Requires 'Limit to one work order open per asset' = 'NO'):** Check this box to allow work order transfers and deferrals. If checked, be sure not to limit to one work order open per asset.
- **User group allowed to transfer/defer WOs:** This setting determines which user group may transfer/defer work orders.
- **Default [final status] Work Accomplished Code (WAC) for deferred WO tasks:** This Work Accomplished Code (WAC) applies to deferred work order tasks only. If the

checkbox that allows transfer/deferral is checked, you cannot leave this blank. You must choose a default WAC for deferred work order tasks.

- **Default [final status] Work Accomplished Code (WAC) for transferred WO tasks:** This WAC applies to transferred work order tasks only. If the checkbox that allows transfer/deferral is checked, you cannot leave this blank. You must choose a default WAC for transferred work order tasks.

Service Request Deferral

- **Allow Deferral of Service Requests?:** This default value determines whether service requests may be deferred. Check the box to allow service request deferral.
- **User group allowed to defer SRs:** This setting determines which user group may defer service requests.
- **Default [final status] Work Accomplished Code (WAC) for deferred SR tasks:** This WAC applies to deferred service request tasks only. When Allow Deferral of Service Requests is checked above, you cannot leave the WAC blank. You are required to select a default WAC that will be used for all work performed to accomplish this type of task.

Portal-wide Settings

- **Require equipment history display first time user views equipment unit:** This default value determines whether the Equipment Unit History is automatically displayed for all users when a work order is created or viewed for the first time.
- **Default jobbed on task ID into task filter when viewing Equipment WO History page:** Check this field to determine if the Task ID filter on the Equipment History page is defaulted to the currently jobbed on task, or if the Task ID filter is left blank.
- **Suppress system added notes for viewed equipment history:** 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 new restriction for the number of OPEN work orders per equipment unit. If set to yes, 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 set to NO, multiple OPEN work orders are allowed per equipment.
- **Force display of WO Messages while creating a new WO:** This default determines whether work order messages are displayed when creating new work orders.
- **Default number of months to report for equipment history:** This default sets the number of months to display and report equipment history.

Equipment History

Asset ID **PB-FAN-38: CNG-EF-26 LOCATED IN BUSWASH** 

Asset Number CNG-EF-26 Station Location BS4171 - FMB40 WESTLINE-BLDG & SUPPOR

Repair Location BS4171 - FMB40 WESTLINE-BLDG & SUPPOR

Current Filter

☒ Months of History to Display (0 = ALL) Task ID (Wildcard = %)

☐ Number of Work Orders to Display (0 = ALL)

No work order history for PB-FAN-38 within the last 12 months.

Work Order ID	WO Date	WO Closed Date	Task ID	Life Meter 1	Meter Since Last PM	WAC	Employee
---------------	---------	----------------	---------	--------------	---------------------	-----	----------

- **Default number of work orders to report for equipment history:** This default determines how many work orders display when equipment history is viewed (0=ALL).

Equipment History

Asset ID **PB-FAN-38: CNG-EF-26 LOCATED IN BUSWASH** 

Asset Number CNG-EF-26 Station Location BS4171 - FMB40 WESTLINE-BLDG & SUPPOR

Repair Location BS4171 - FMB40 WESTLINE-BLDG & SUPPOR

Current Filter

☐ Months of History to Display (0 = ALL) Task ID (Wildcard = %)

☒ Number of Work Orders to Display (0 = ALL)

History for all occurrences

Work Order ID	WO Date	WO Closed Date	Task ID	Life Meter 1	Meter Since Last PM	WAC	Employee
BS4171-2011-396	02/09/2011 10:48 AM	02/09/2011 03:55 PM	BS2-FAN-Q-PM - QUARTERLY FAN LARGE PM	0	0		
BS4171-2010-3195	11/09/2010 04:02 PM	11/11/2010 10:30 AM	BS2-FAN-Q-PM - QUARTERLY FAN LARGE PM	0	0		

- **Date/Time Values in 24 hour or 12 hour format:** This default indicates how to display date/time values, e.g., 24 hour (13:29) or 12 hour (1:29 PM) 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 Info and Detail sections. You can choose to show costs for labor, parts, and total.

Work Order Details

Asset ID	CNCAR344: SNCAR344 2012 FORD F150 CAR 344		
Life Meter 1	300 MILES	Life Meter 2	3 HOURS
Station Location	CNLOC1 - REPAIR SHOP 1	Repair Location	CNLOC1 - REPAIR SHOP 1
Work Order ID	CNLOC1-2015-89	Job Status	OPEN
Job Type	REPAIR	Technician	CNEMP010 - EMPLOYEE 010 - FOREMAN CREW 1 & 2
Unit In	07/06/2015 11:50 AM	Due	07/07/2015 11:50 AM
Meter 1	300 MILES	Meter 2	3 HOURS
Hours Completed	15.00 / 15.00 (100.00%)	Tasks Completed	0 / 3 (0.00%)
Projected Completion Date	10/15/2015 11:25 AM		

Messages

Equipment History

Print Work Order

Start Delay

Edit Basic Info

Relationships

Files

Test Results

Equipment Usage

Add / Manage SRs

Work Order Tasks

New Job

Summary Cost Info

Labor Hours	Labor Cost	Parts Cost	Commercial Cost	Equipment Cost	Total Cost
15.00	468.00	3932.25	692.30	0.00	5092.55

Notes

New Note

Comments

Save Comments

Work Order Postings

Tasks

Labor

Parts

Cml

New Task

CNTASK001 - TASK 001 - SUPPORTS ALL ASSET CATEGORIES

Remaining Hours: 0.00 WAC:

Parts:

Date	Part ID	Description	WAC	Qty	Unit Price	Total Cost
07/06/2015	CNPART200-0	ENGINE- DIESEL; V-8 DIESEL ENGINE		1.00	3745.0000	3932.25
						Total: 3932.25

Commercial:

Date	Vendor	Labor Cost	Parts Cost	Misc Cost	Total Cost
10/15/2015	CNVENDOR003 - COMMERCIAL VENDOR 003	68.10	572.50	51.70	692.30
Total:		68.10	572.50	51.70	692.30

CNTASK002 - TASK 002 - SUPPORTS ALL ASSET CATEGORIES

Remaining Hours: -15.00 WAC:

Labor:

Start	End	Technician	WAC	Hours	Cost
10/13/2015 11:15 AM	10/14/2015 02:15 AM	MOLLY-EMP - MOLLY		15.00	468.00
Total:				15.00	468.00

CNTASK003 - TASK 003 - SUPPORTS ALL ASSET CATEGORIES

Remaining Hours: 0.00 WAC:

Back

Finish Work Order

Close Work Order

Highlight Test Results button if result status is

In this section, you can 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 on the Work Order Main and Technician Main pages.



Note: All messages display when you click the **Messages** button. The setting determines when the button is highlighted and does not affect the messages that display.

Work Order Details																					
Asset ID	SRV-CAR1: 7897894569 2006 CHEVROLET BLAZER RED BLAZIN FIRE																				
Asset Number	SRV01	Station Location	ABA - 2 ASSET CENTRAL ADMINISTRATION																		
License Number	PRINCESS1	Repair Location	ABA - 2 ASSET CENTRAL ADMINISTRATION																		
Work Order ID	1-2015-5	Job Status	OPEN																		
Job Type	REPAIR	Unit In	09/29/2015 09:48 AM																		
Due	10/01/2015 09:48 AM																				
Repair Reason ID	B - BREAKDOWN	Work Class																			
Account ID	1000.111101.00001.000.00000 - TEST		Parking Stall																		
Priority ID	Q0 - QA'S PRIORITY CODE	Reference Order ID																			
Contact Name	Phone																				
<table border="1"> <thead> <tr> <th colspan="6">Summary Cost Info</th> </tr> <tr> <th>Labor Hours</th> <th>Labor Cost</th> <th>Parts Cost</th> <th>Commercial Cost</th> <th>Equipment Cost</th> <th>Total Cost</th> </tr> </thead> <tbody> <tr> <td>2.57</td> <td>59.23</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>59.23</td> </tr> </tbody> </table>				Summary Cost Info						Labor Hours	Labor Cost	Parts Cost	Commercial Cost	Equipment Cost	Total Cost	2.57	59.23	0.00	0.00	0.00	59.23
Summary Cost Info																					
Labor Hours	Labor Cost	Parts Cost	Commercial Cost	Equipment Cost	Total Cost																
2.57	59.23	0.00	0.00	0.00	59.23																
<table border="1"> <thead> <tr> <th colspan="2">Notes</th> </tr> </thead> <tbody> <tr> <td>03/09/2016 02:38 PM</td> <td>SRV - SARAH VICKERS</td> </tr> <tr> <td colspan="2">Service Request: CN-SYMP-001 - DESCRIPTION: SYMPTOM 001</td> </tr> <tr> <td colspan="2">ADDING NEW NOTE FOR TESTING PURPOSES-SRV</td> </tr> </tbody> </table>				Notes		03/09/2016 02:38 PM	SRV - SARAH VICKERS	Service Request: CN-SYMP-001 - DESCRIPTION: SYMPTOM 001		ADDING NEW NOTE FOR TESTING PURPOSES-SRV											
Notes																					
03/09/2016 02:38 PM	SRV - SARAH VICKERS																				
Service Request: CN-SYMP-001 - DESCRIPTION: SYMPTOM 001																					
ADDING NEW NOTE FOR TESTING PURPOSES-SRV																					

Messages

Equipment History

Print Work Order

Start Delay

Edit Basic Info

Relationships

Files

Test Results

Equipment Usage

Add / Manage SRs

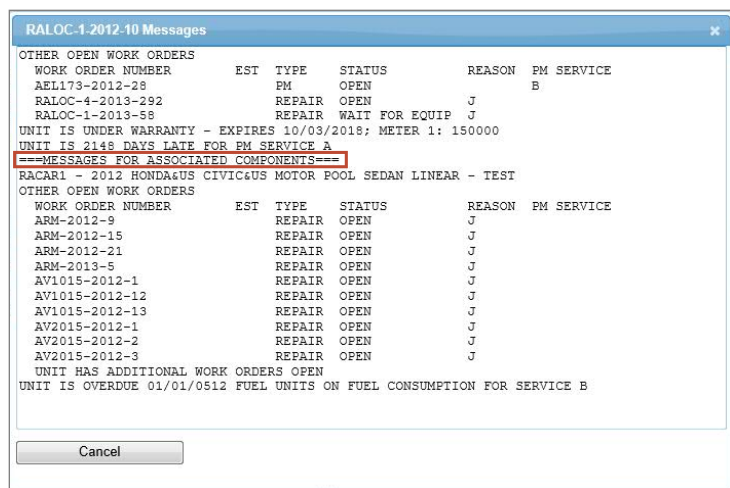
Work Order Tasks

New Job



An option on the Location Primary Information screen on the Work Orders - Options tab allows display of messages for all parent and child assets as well as the specific asset being viewed.

Work Orders - Options	
☐ Work orders permitted ☐ Permit re-open of closed work orders ☐ Require work class on work orders ☐ Require labor for tasks when parts charged ☐ Require employee ID for PM task checklist items ☐ Check motor pool availability for pool units ☐ Perform SLA out of service and in shop processing from work order screens ☐ Allow issue of not-from-inventory parts at zero unit price	Include work order messages for associated components ☐ while inserting a new work order ☒ on printed work orders ☐ Apply component options to show all parent-child assets ☐ Display all non-expired component warranties in work order messages



Calendar and Scheduling

Hide Shop Calendar Capacity: Enable this to hide the capacity calculations for the shop calendar. By default, this setting is disabled.

Details to display on calendar preview: Check the options to display the following items on the calendar preview.

- **Hours:** The estimated hours or start time and end time. This is checked by default.
- **Title:** The work order title. This is checked by default.
- **ID:** The work order ID, task ID, etc. This is checked by default.
- **Asset:** The name/ID of the asset
- **Department:** The name/ID of the department

Details to display on calendar panel view: Check these options to display the following items on the calendar panel summary view.

- **Title:** The work order title. This is checked by default.
- **ID:** The work order ID, task ID, etc. This is checked by default.
- **Asset:** The name/ID of the asset
- **Department:** The name/ID of the department

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.
- **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 default indicates the quantity on hand as either the number of parts in stock or whether the item is available (yes/no).
- **Require approval for part returns:** Checking this box requires supervisor approval for all part returns.

 **Note:** This setting must be the same in both the 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

Reset Search

Search by Defined Lists

Where Used

Task ID: ... Lookup

Class / Task Task Parts

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
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:

Parts History - 1000-2011-3

Parts Posted

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

Expand All Collapse All

Parts Requested

Date	Part ID	Manuf Part No	Manufacturer	Description	Status	
01/18/2012 13:43	05046-2			BATTERY PROTECT; BATTERY PROTECTOR	COMPLETED	4

Post Work Order Parts

Complaint (Symptom): LMBROKEN - PART BROKEN

Basic Info **Standard Parts**

Add Parts Posting - Line 1 Issue Request Service Request: LMBROKEN - PART BROKEN

Task ID: 01 Lookup HVAC SYSTEM WAC:

Stock Location: 000 SAN DIEGO, CA Bin:

Part: NA-20010 Lookup Description:

Manuf Part No: NA-200-0239 Manufacturer: NAPA

Qty: 1 Qty on Hand: Unit Price: 0.0650 Core Value:

- **Part Actions to be handled through external system URL:** This setting enables an organization to bypass the part actions links with a link to an outside URL, if necessary, and sends with it the work order ID to facilitate ordering materials for work orders. All Shop Activity portals include this setting except Storekeeper. The setting **must** be set in

the individual portals. When this setting is set, whenever users click a Part Actions or Parts button in the system, the user is taken to the external URL.

- **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.

Parts Actions 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.

- **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 which report is printed when the PM Check List Report button is pressed. If you decide to change the default report, please be aware that it only takes four inputs: WorkOrderLoc, WorkOrderNo, WorkOrderYr, and PMService.



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

- **PM Check List Items Completion:** This default determines whether technicians are Always Required, Never Required, or Prompted to review the PM Check List for completion of all items when finishing the work order.

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 Report - Print Work Order:** This field specifies which report is printed when the **Print Work Order** button is pressed on the Work Order Main page. If you decide to change the default report, please be aware that it only takes three inputs: LOCATION, WOYEAR, and WONUM.

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

- **Equipment History Report:** This field specifies which report is printed 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.

Settings for Work Order Details 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 Details page. If you decide to change the default report, please be aware that it only takes three inputs: LOCATION, WOYEAR, and WONUM.

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

Settings for New Work Order Page

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

- **Do not use FA defaulted PM Service for new PM WO's:** This default setting determines whether new PM work orders use the defaulted PM Service.

Saving Your New Settings

When you are finished setting the default values and settings, click **Save**.

After you have finished configuring Shop Activity's Technician Portal, exit your browser and open a new browser window before you use the Technician Portal tab to view or update data. For additional information about the Technician Portal, please refer to the *Shop Activity Technician Portal User Guide*.