

Version 25



Trapeze

Enterprise Asset Management

Shop Activity – Technician

User Guide

Trade Secret | August 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 Technician – User Guide

Version 25.x

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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 perform the following functions:

- View work assigned to them
- Log on and off of direct and indirect tasks
- Post after-the-fact parts, commercial, and labor information to work orders
- View equipment repair history, service requests, and messages
- Request or issue parts for work orders and view status of past requests and issues
- 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 Cs) for repairs performed
- Create new work orders as needed
- Place work orders into WORK FINISHED status
- Place work orders in CLOSED status
- Transfer/defer service requests and work orders
- Add/modify related tasks
- Add/manage service requests to work orders
- Print work orders

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 touch screen monitors, removing the need to use a mouse and minimizing the use of a keyboard.



To understand the slight differences in screens when viewing production run work orders, please refer to [Appendix A – Extra Information about Production Run Work Orders](#).

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.

General Portal Information

The information entered in this section applies to areas throughout the portal.

- When entering information in Task ID and Account ID fields, these fields will narrow down according to entered IDs. If a task ID is entered, the **Account ID** field only display accounts that support that task ID. If an account ID is entered, the **Task ID** field only displays tasks that support that account. If neither of these items are entered yet, all accounts or task IDs display.

2. Understanding the Technician Portal

The Shop Activity Technician Portal displays and updates data based on the logged-in user's associated Employee ID.

The screenshot shows the 'Users' management interface. At the top, there are tabs for 'ADMIN MODE' and 'CHANGE REQUESTS'. Below the tabs are search and filter controls, including 'Search', 'Reload', 'Sort', 'Select Filter', and 'Select Sort'. On the right, there are buttons for 'New', 'Copy', 'Delete', 'Edit', and 'Save'. The main content area is divided into a left sidebar with links like 'Basic Info', 'Groups Currently Assigned', 'Comments', 'Security Options', and 'Printers'. The 'Basic Info' tab is selected, showing fields for 'Name', 'Phone', 'New password', 'Email address', 'Associated employee ID', 'Associated operator ID', and 'Session location ID'. The 'User ID' field at the top and the 'Associated employee ID' field are both highlighted with red circles.

When the Shop Activity Technician portal is fully configured, the user may log into Web Modules and click on the Technician portal tab. Depending on the configuration, the user may then be required to click the **Clock In** button.

The screenshot shows the 'My Work Portal' clock in page. At the top, it says 'My Work Portal' with a small icon. Below that, a message reads: 'You are clocked out. Please press CLOCK IN to clock in. This does NOT clock you in for payroll. Use the payroll time clock if you have not yet done so.' There are two dropdown menus: 'Time Code' set to 'REGULAR' and 'Location' set to '1 - OPS'. At the bottom, there is a 'Clock In' button, which is highlighted with a red circle.

The Technician portal clock in page

 The **Clock In** button does NOT clock in technicians for payroll. It is necessary to clock in on the payroll clock if you have not already done so.

After clicking the Technician Portal tab (or the Clock In button), the Main Technician page displays. The look of the Main Technician Portal page will depend on the settings for the technician's session location (real-time, posting or both (real-time and posting)).

3. Main Technician Portal Page (Real-Time)

This section provides an overview of the portal in the real-time environment. Please refer to the [Main Technician Portal Page \(Posting\)](#) section for specifics about how to use the portal in a posting environment.

The logged-in user and location show at the top of the page. The Session Location drop-down box allows you to set the location where new work orders are created. This location defaults to the location set for the user's employee ID.

The screenshot displays the 'My Work Portal' interface. At the top, it shows the user 'S VIS (SV)' at location '1 - OPS'. Below this, there are fields for 'Labor Status' (NONE) and 'Session Time Code' (REG - REGULAR [Change]). To the right are buttons for 'Indirect Time', 'Edit/Stop Task', 'Today's Work Log', and 'Clock Out'. The main navigation bar includes tabs for 'Current Job', 'My Work' (selected), 'Work Calendar', 'Crews', 'Equipment', and 'Requests'. Under 'My Work', there are sub-tabs for 'Assignment Status' (ALL, ASSIGNED, MY STAGE) and a 'Sort' dropdown set to 'Hot Sheet'. There are also buttons for 'Expand All', 'Collapse All', 'List', and 'Map'. The task list shows four entries:

Task Count	Date	Task Description	Priority	Delay	Days Open/Left	Service Status
2 task(s)	1-2017-6	S RAILROAD RAIL TRACK 2017 RAIL REPAIR	3			
4 task(s)	1-2017-23	Scheduled: 05/23/2017 02:00 AM CAR01 2006 JEEP GRAND CHEROKEE==Meters: 1-20100 MILES; 2-200 HOURS==JEEP GRAND CHEROKEE	3		478/0	
2 task(s)	1-2017-36	Scheduled: 04/06/2017 02:00 PM CAR03 2017 JEEP GRAND CHEROKEE==Meters: 1-0 MILES; 2-0 HOURS==JEEP GRAND CHEROKEE LIMITED	4		451/0	
3 task(s)	1-2017-38	Scheduled: 04/05/2017 07:00 AM CAR01 2006 JEEP GRAND CHEROKEE==Meters: 1-20100 MILES; 2-200 HOURS==JEEP GRAND CHEROKEE	1		451/0	

At the bottom, there is a search bar with the text 'Eq ID - License # - Asset # - VIN - Rebuild Part ID' and a 'Go' button.

Main Technician Portal Page

 The look of the **Main Technician** page differs depending on whether you are logged into a task or not.

Current Status Section

If a task is not currently underway (as in the picture below), the **Labor Status** field reads **NONE**, and the **My Work** tab shows the work orders assigned to you. See the [My](#)

[Work Orders Tab](#) section below for more information about this area on the Main Technician page.

As shown in the screenshot below, when the current user is logged into a task, detail regarding the task displays in the Current Status area and the Current Job tab shows information pertaining to the task you are performing.



Note: A moving wrench indicates the task you are logged into. See the [Current Job Tab](#) section below for more information about this area on the Main Technician page.

Work Order Number Button

The work order number button is a link to the Work Order Main page. See the [Work Order Main Page](#) section below for more information about this page.

Task Time Code Field

The Task Time Code field shows the time code being used by the logged-in employee. It also provides a Change link that takes you to the Change Initial Time Code page. This page is used to switch from standard time to overtime, if appropriate and required by your organization's business process.

Change Initial Time Code

Current Initial Time Code: REG - REGULAR

Changing your default time code will also affect your current job (if any).

(QA-REG) QA'S REG TIME	(01) LEAVE WORK ORDR	(TH-REG) REGULAR TIME
(REG) REGULAR	(DI) STANDARD DIRECT	(TH-OVER) OVERTIME
(BREAK) BREAK	(OT) OVERTIME	(TH-HOLID) HOLIDAY
(00) LEAVE WORK ORDR	(OT2) OVERTIME2	

Cancel

The Change Initial Time Code page



Note: Changing the time code starts the time on task for that time code back at zero. Labor tracked so far under the previous time code is posted to the database and a new entry is begun using the new direct time code.

Task Field

When the Task field is highlighted yellow, it means the task has a procedure associated with it (either on the Class/Task Information screen or the Tasks Primary Information screen in the GUI). The Task field contains two hyperlinks: the Task Code link takes you to the Work Order Task page and the Modify link takes you to the Modify a Task page. See the [Work Order Task Page](#) section and the [Modify a Task](#) section below for more information about these pages.

Equipment Field and Asset Viewer

The Equipment field contains a link that takes you to the Enterprise Portal screen used to define the subject asset (if your organization utilizes the Web Modules Enterprise Portal).



For part rebuild work orders, the Part displays instead of Equipment.

Also included in the equipment field is a zoom icon which opens the Asset Viewer. Throughout Shop Activity, the Asset Viewer gives you the ability to view an equipment unit's relationship tree. It provides many details about the equipment unit including PM information, meter and usage information, links to Enterprise Portal screens, and more.

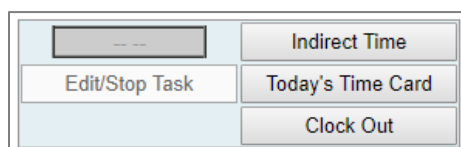


Note: For linear assets, to the right of the asset ID and zoom button, there is an Attributes icon . Click this icon to see attributes and information for the liner asset.

Work Order Main			
Asset ID	CAR01: V-EQTYPE		
Asset Number	ASSET001	Station Location	OPS
License Number		Repair Location	OPS
Operator Name			
Work Order ID	1-2017-38	Job Status	OPEN
Job Type	REPAIR	Technician	
WO Meter 1	0 MILES	WO Meter 2	0 HOURS
Contact Name		Projected Completion Date	04/04/2017 04:00

For more information on the Asset Viewer, refer to the *General Application Information* guide.

Time Section



The buttons in this area represent the different labor-related or miscellaneous actions available for a technician to execute. Buttons are grayed-out if the action they represent is not available in the context of their current work status.



When the task you are logged into has a PM Checklist associated with it, this section shows the **PM Checklist** button.

Time on Task Button

The Time on Task button shows how long you have been logged into a task (00hours 00minutes). Click this button to go to the Work Order Task page. See the [Work Order Task Page](#) section below for more information about this page.

Indirect Time Button

The Indirect Time button takes you to the Choose an Indirect Task ID page as shown in the screenshot below. Crew foremen can perform real-time postings for indirect tasks on this page. Choose the location, enter or select a Time Code, and enter a comment (that shows on the timesheet), and click the Indirect Task ID to change your time code.

Choose an indirect task ID for EMP-AC

Location:

Time Code:

Comment:

(IND-AB) ABSENCE	(IND-WE) AWAITING EQUIP	(IND-04) BREAK
(IND-BLOCKOUT) BUS BLOCKOUT	(IND-CRC) CLEANING RAIL CARS - CAR A	(IND-06) END SHIFT
(IND-14) EQUIP READ MTRS	(IND-EXIT PRO) EXIT PROHIBITS	(IND-FR) FIELD REPAIR
(IND-11) FUELING EQUIP	(IND-01-O) IND TASK OVERRIDE 01-O	(IND-TT) INDIRECT TEST
(IND-13) INVENTORY TAKING	(JBTASK1INDIR) JIM TASK 1 = INDIRECT	(JLB IND 01) JLB IND 01
(IND-05) MEAL	(IND-MT) MEETINGS	(IND-ML) ML TECHTOWING
(IND-ND) NEXT DAY PREP	(IND-07) NOT USED	(IND-08) NOT USED
(IND-17) NOT USED	(IND-18) NOT USED	(IND-10) PART ISSUE
(IND-PA) PARTS HANDLING/	(IND-PR) PULL-OUT REPAIR	(QA-IND-01) QA INDIRECT TASK 1
(QA-IND-02) QA INDIRECT TASK 2	(QA-IND-03) QA INDIRECT TASK 3	(QA-BREAK) QA'S IND TASK #1
(QA-CLASS) QA'S IND TASK #1	(QA-CLEAN EQ) QA'S IND TASK #1	(QA-CLEAN SHP) QA'S IND TASK #1
(QA-FUELING) QA'S IND TASK #1	(QA-INV TRACK) QA'S IND TASK #1	(QA-LUNCH) QA'S IND TASK #1
(QA-SHIFT BGN) QA'S IND TASK #1	(QA-SHIFT END) QA'S IND TASK #1	(QA-TIME CARD) QA'S IND TASK #1
(QA-TOOLS) QA'S IND TASK #1	(IND-854 INSP) RAIL 854 INSP	(IND-ROS) RAIL OPS SUP
(IND-SA) SAFETY	(IND-SC) SHOP MAINT/CLEA	(IND-SE) SPECIAL EVENTS
(IND-03) START SHIFT	(IND-16) TEST RESULTS	(IND-09) TIME CARD
(IND-TR) TRAINING	(IND-02) TRANSMIT DATA	(IND-TV) TRAVEL TIME
(IND-UN) UNION	(IND-12) WASHING EQUIP	(IND-WP) WEATHER PREP
(IND-15) YARD CHECK		

Back Select Employees

To stop the indirect time charge, the technician either starts tracking time on a different work order or indirect task, or clicks on the Edit/Stop Task button as shown below.

 If your organization prefers that this capability only be used by supervisors, go to the Portal settings > Location Settings > Labor Tracking Settings > Use Legacy Indirect Labor Entry Method. Checking this box will restrict input of timecode to supervisors only. To manage this for real-time workflows, use the control rights screens for users rather than the "Use Legacy Indirect Labor Entry Method" setting.

Edit/Stop Current Activity Button

Depending on your settings, if you are working on an indirect task, clicking the Edit/Stop Task button will either stop the indirect task or take you to the Indirect Task page where you may enter the Account ID and/or a comment and click the Stop Task button to stop the indirect task.

Indirect Task

Task Code:

Indirect Task Fields

Location:

Account ID: ... MAINTENANCE

Comment:

Back Stop Task

Otherwise, the Edit/Stop Task button takes you to the Work Order Task page which allows the user to update task details, stop a task and/or finish a work order. This button also allows the user to update task details including: equipment warranty flag, repair reason, priority ID, and estimated hours. Any of these may be updated and saved (without stopping the task), or none may be updated and the task may simply be

stopped (without logging into a new task). See the [Work Order Task Page](#) section below for information about this page.

Today's Time Card Button

The Today's Time Card button takes you to the Time Card page and presents an overview of the current day's labor for the user that is logged into the system. Depending on the configuration settings, the amount of history shown may vary.

The screenshot shows the 'Time Card' interface. At the top, there's a header 'Time Card' and a sub-header 'SA'. Below this, there are several controls: 'Day Starts At' (00), 'Date' (02/14/2017), 'View' (Month), 'Group By', 'Accrual Time Type' (FLT), and 'Current Balance' (40.00). There's also a 'Work' dropdown and a 'Refresh' button. Below these controls, it says 'Showing Labor for 02/01/2017 00:00 - 03/01/2017 00:00'. The main table has columns: WO/SR/Indirect, Date, Task, WAC, Time Code, Classification, and Hours. The table shows two entries for 'Work Order: 1-2017-23' on 02/28/2017. The first entry is for 'AF - PM SERVICE A' from 07:00 to 14:00, with 7.00 hours. The second entry is for 'AF - PM SERVICE A' from 14:35 to 14:39, with 0.07 hours. The total hours are 7.07. At the bottom, there are buttons for 'Back', 'Clock Out', and 'Review Timesheets'.

WO/SR/Indirect	Date	Task	WAC	Time Code	Classification	Hours
Work Order: 1-2017-23						
Work Order: 1-2017-23 Equipment: SRV-CAR01 Service Request:	02/28/2017 07:00 02/28/2017 14:00	AF - PM SERVICE A	02 - ADJUSTED	REG - REGULAR		7.00
Work Order: 1-2017-23 Equipment: SRV-CAR01 Service Request:	02/28/2017 14:35 02/28/2017 14:39	AF - PM SERVICE A	02 - ADJUSTED	REG - REGULAR		0.07
Total Hours:						7.07



The moving wrench indicates the task you are currently logged into.

Select the **Day Starts At** (starting time), **Date**, and **View** from the drop-down boxes and click the Refresh button to update the timesheet displayed.



Note: Time entries that do not have a time stamp (for example, if a posting was posted with the hours only and did not have a time start and end) automatically default to midnight. If you change the **Day Starts At** field to something other than 00 (midnight), and refresh the page, the postings without time stamps will no longer display for that day, as midnight is no longer included in that day, but will display on the previous day since it now falls in that previous 24-hour period.

You may click the + or - button to expand/collapse the work order view to show/hide tasks or click the work order link to go to the Work Order Details page. Refer to the [Work Order Details](#) page section for more information about this page.



The start/end times for hours worked are displayed based on settings.



Time cards entries can be edited if your location is set to allow editing. Click the **Edit** button that appears to the right of the Hours column to make changes.

Hours	
43.75	
43.70	Edit
0.02	Edit

- Click **Back** to return to the **Main Technician Portal** page.
- Click **Indirect** to go to the **Choose an Indirect Task ID** page.
- Click **Clock Out** to clock out of the Technician portal.
- Click **Review Timesheet Summary** to review the timesheet summary in the Timesheet portal.

Review Timesheet Summary Button

Review your timesheet on the Review Timesheet Summary page. The only timesheet available is your timesheet.

1. From the Timesheet page, click **Review Timesheet Summary**.

Timesheet for: SARAH VICKERS (SRV)

Day Starts At Date View Group By

Showing Labor for 12/29/2016 12:00 AM - 12/30/2016 12:00 AM

WO/SR/Indirect	Date	Task	WAC	Time Code	Hours
Thursday, December 29, 2016					0.07
WO: 1-2016-22	12/29/2016 08:38 AM	AC1-001 - BASIC TASKS - CLEANING		REG - REGULAR	0.07
EQ: SRV-CAR1	12/29/2016 08:42 AM				
SR:					
					Total Hours: 0.07

The Timesheet List Filter page displays. This page displays all open timesheets for the employee.

Timesheet List Filter

Employee ... SARAH VICKERS

Open Timesheets

Displaying Open Timesheets For: SRV

Timesheet ID	Employee	Start Date	End Date	Total Hours	Supervisor Approval	Employee Approval	Shift
142	SRV - SARAH VICKERS	02/26/2017	03/04/2017	5.00			

Showing 1 record

2. Click the red timesheet ID hyperlink to open the timesheet.

The Timesheet Filter page displays. Non-working and holiday days are displayed as 0 hours.

Timesheet Filter

Employee: SARAH VICKERS

Date:

Timesheet

Timesheet ID: 142 Employee: SRV

Start Date: 02/26/2017 End Date: 03/04/2017

☐ Employee Approval Approved by User ID: Date and Time Approved:

☐ Supervisor Approval Approved by User ID: Date and Time Approved:

Status: OPEN

Time Code ID	Location	Total Hours	Sun 26 Feb	Mon 27 Feb	Tue 28 Feb	Wed 1 Mar	Thu 2 Mar	Fri 3 Mar	Sat 4 Mar	Comments
GRAND TOTAL		5.00	0.00	0.00	5.00	0.00	0.00	0.00	0.00	
SE-NWD - NON-WORKING DAY		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
REG - REGULAR 1		5.00	0.00	0.00	5.00	0.00	0.00	0.00	0.00	

Back Save New Timesheet Entry Submit Approve

3. Review the timesheet as needed or click **Skip** to skip to the next timesheet.

Note: If any changes were made to the timesheet before clicking **Skip**, you will be prompted to save changes, or continue and lose changes.

Note: Any change to the size of the timesheet columns will stay as set regardless of leaving the page or logging out.

4. To add a new note to the timesheet:

Click **New Note**.

The New Note pop-in displays.

New Note

Enter New Note:

Enter your note and click **OK**, or click **Cancel** to cancel and discard any entered text.

5. If a time entry is missing or needs to be added, use the **New Timesheet Entry** button:

- i. Click **New Timesheet Entry** to add a new entry to the timesheet.

The Timecard pop-in displays.

Use the date picker to enter a **Date**. This is required.

Enter the hours to add to the entry.

Use the chooser buttons to enter **Time code** (required), **Location ID**, **Department ID**, and **Account ID** as needed.

Add a comment to the entry if needed.

Click **Save**.

***Successful Insert** displays with a successful entry, otherwise an error displays if needed information is missing. The Timecard pop-in stays open in case another entry is required.*

After all entries are added, click **Close**.

6. Next, do one of the following:

- To approve the timesheet, if you have permission, click **Approve**. When you approve the timesheet, the Supervisor Approval checkbox is checked, and your initials display as well as the time and date of the approval. If this timesheet is already approved, the **Approve** button will not display.

The next timesheet opens, or you are returned to the Timesheet List Filter page.

- To submit the timesheet for approval, click **Submit**. When you submit the timesheet, the **Employee Approval** checkbox is checked, and your initials display as well as the time and date of the approval.

You are returned to the Timesheet List Filter page.

- Once a timesheet is approved, you can reject the timesheet by clicking **Reject** on this page if you have permission. This sends the timesheet back for changes.

You are returned to the Timesheet List Filter page.

- If you made any changes but do not click **Approve** or **Submit**, click **Save** to save your changes.
- To reject the timesheet, uncheck the **Employee Approval** checkbox, click **Save**, enter a reason in the New Note pop-in that displays, and click **Save** to save that reason and reject the timesheet.

PM Checklist Button

The PM Checklist button displays when a technician is logged onto a PM or Inspection service that has a class/task PM checklist defined.

Click the **PM Checklist** button to go to the Work Order PM Checklist page that displays the checklist of items associated with the specific service.

Work Order PM Checklist Total Done: 70 of 133

Asset ID: 01: 2001 NEW FLYER C40LF

Work Order ID: LOC-2017-281

PM Checklist Items Skill Type: ALL SKILL TYPES(DONE: 70 of 133)

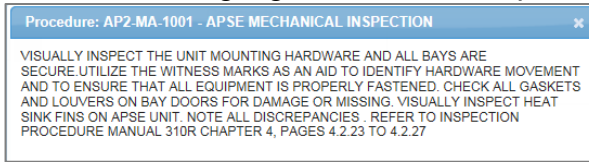
Edit Items

	Done	Failed	Technician	Sequence	PM Task	Change Request	Skill Type	Test Results	Not Applicable	Svc Rqst
☐	☐	☒		20	999-002 - CHECK AIR PRESSURE DROP	☒	XAN-A1	Test Results	☒	
☐	☐	☒		30	999-003 - CHECK OPERATOR'S INSTRUMENTS; SWITCHES; AND TELLTALE LIGHTS	☒	XAN-A1	Test Results	☒	
☐	☐	☒		40	999-004 - CHECK OPERATION OF THE LOW AIR PRESSURE BUZZER.	☒	XAN-B2	Test Results	☒	
☐	☐	☒		50	999-005 - CHECK AIR PRESSURE EFFICIENCY AND FAST IDLE	☒	XAN-B2	Test Results	☐	
☐	☐	☐		750	999-075 - CHANGE BOTH CNG FUEL FILTERS	☒			☐	☒
☐	☐	☐		840	999-084 - CHECK THE CONDITION OF; SURGE TANK; MANUAL PRESSURE RELIEF	☒	INSP		☐	
☐	☐	☒		850	999-085 - CHECK ALL WATER HOSE CLAMPS.	☒	INSP		☒	☒

Showing 133 records

Back Save PM Checklist Report

- PM tasks are highlighted yellow when procedural information is associated with the task. Hover over a highlighted PM task to display a pop-in with the procedural information for the task. Click the highlighted area to keep the pop-in open until



you click to close it.



Note: Right-click the column header to open a pop-in that allows you to add and remove columns in this checklist.



Note: Users may sort the table by skill type and the header items. However, it is important to save your changes prior to doing so, or they may be lost.



Note: Administrators can re-order or hide columns.

- An Associated Work column displays a Service Request ID or Work Order ID when there is a related service request for the PM Task. A service request is considered related when the “Occurs on” fields on it contain the current Work Order ID, PM Service and PM Task.
- Edit Items – To edit a checklist item, click the **Edit Items** button which will open a dialog that allows you to edit a single line item at a time and navigate through checklist items.
- Add New Item – The **Add New Item** button will display for exception checklists. Click this button to open a dialog that allows you to add a new PM task to the exception checklist.
- Mark Complete - To mark checklist items as complete, check the **Done** checkbox next to completed checklist items, add comments if desired, and click the Save button. You are returned to the Main Technician page.
- Print Report - To print a hard-copy version of the PM checklist, click the **PM Checklist Report** link in the bottom right corner of the page.
- ✓ If customizing this report, please name it “PM Checklist Report,” and be aware that the following case sensitive parameters are used in the report: WorkOrderLoc, WorkOrderYr, WorkOrderNo, and PMService.
- Keyboard Shortcuts
 - [SHIFT]+[C] - Close dialog (escape also works)
 - [SHIFT] [D] – Using this in conjunction with [SHIFT] [RIGHT] will allow users to easily complete items and advance to the next item.

- [SHIFT]+[S] - Save dialog. Pushes changes to item back to main checklist page but does not save data into the database. Checklist still needs to be saved on the main page. This is a shortcut for the "Add Item" button when adding a checklist item on exception checklists.
- [SHIFT]+[T] - Open Test Result dialog. Will show warning message saying that shortcut is unusable when checklist item dialog is closed or the checklist item does not have test results.
- [SHIFT]+[right arrow] - Move to the next task. Will push any pending changes to the main checklist table.
- [SHIFT]+[left arrow] - Move to the previous task. Will push any pending changes to the main checklist table.

Clock Out Button

Depending on the configuration settings, the **Clock Out** button clocks the technician out of the work session. To exit Web Modules, the technician must first logoff any work order or indirect task. If **Require viewing timesheet on clocking out** is active, technicians are automatically directed to a view of the day's timesheet before they can clock out by clicking **Clock Out**.

My Work Tab

The My Work tab displays on the main Technician page when the user is not logged into a task. This section shows all work orders assigned to the employee ID of the logged-in technician. It also lists the work orders on which the technician has previously performed work. Work orders that are part of a multi-asset work order will be displayed if there are unique tasks on the work order. The work orders also display information about scheduled dates in three colors:

- Green  : Assignments due today
- Blue  : Assignments due tomorrow
- Grey  : Assignments due in the past or future.

Assignment Status

Select the Assignment Status by clicking the desired tab.

ALL: Select this tab to display all the work orders the technician has performed labor on, as well as all the assigned work orders and/or tasks.

 A work order is considered to be assigned to an employee if the **Tech/vendor** field in the Work Order Center/Work Order – Short Form screens is set to that employee's ID, and the work order is in PENDING or OPEN status. Work orders are also considered to be assigned if the technician has been assigned to the work order through the **Shop Activity** ➔ **Work Assignment** ➔ **Work Assignment** screen. If using the Shop Scheduling Module, a work order is also assigned if the work order or any task on the work order is assigned to the employee on the **Work Assignment** screen (or via the Shop Activity Module's Supervisor Portal). If the work order is open, but in delay status, that delay status code is also displayed in this area.

 Work orders will not display when all the Technician assigned tasks are complete.

 Stopping a task on the Work Order Task Detail will un-assign the technician from the task. If the technician has no assignments to the Work Order or any of the tasks associated with it, then it will no longer appear in the Assigned Tab. The Work Order will display in the ALL tab instead.

ASSIGNED: Select this tab to display the work orders and/or tasks that have been assigned to the logged-in technician.

 Technicians can view work finished work order on the All tab when the Technician Portal setting, "Allow Technician to View Work Finished Work

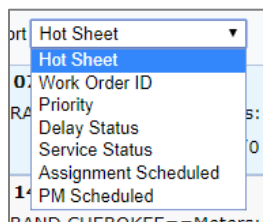
Orders” has been enabled. A header will separate the finished work order from other open and pending work.



The finished work orders list and the open or pending work order list will be sorted independently based on the sorting method chosen.

MY STAGE: This tab only applies to production runs. It displays assigned work orders with the same location as the current session location.

Sort Drop-down List



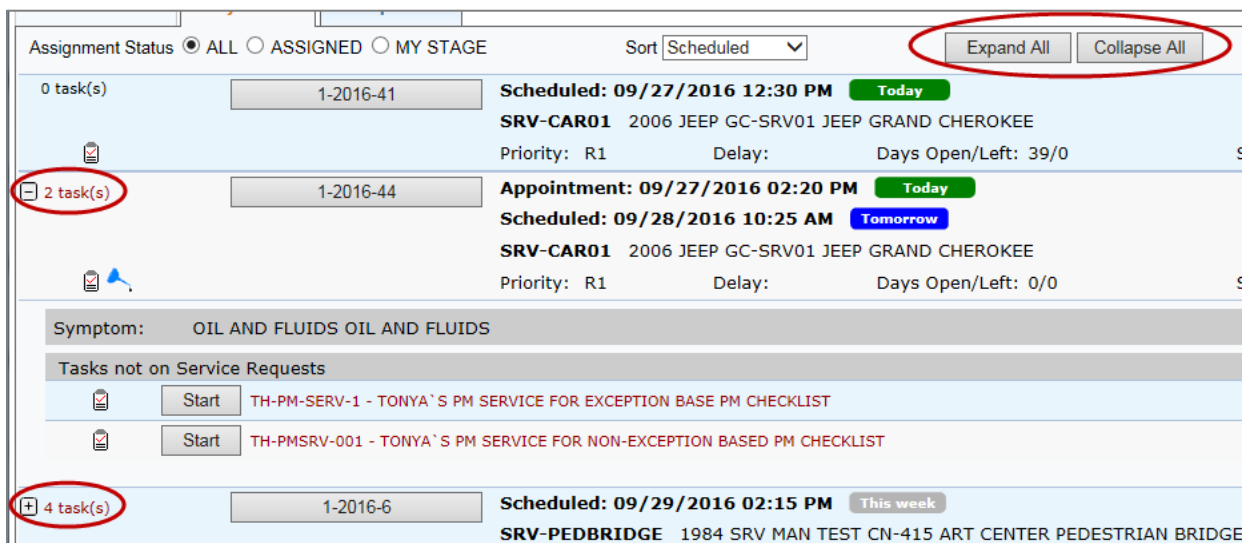
Sort the work orders as desired by selecting from the **Sort** drop-down box. The **Sort** drop-down list allows you to sort the work order list according to Hot Sheet, Work Order ID, Priority, Delay Status, Service Status, Assignment Scheduled, or PM Scheduled.

Sort	Description
Hot Sheet	This is a hierarchical sort with respect to the following order: Work Order Assigned, Work Order WAC Not Final Status, Priority (Rank), and Work Order ID. The same sort applies to service requests and tasks. In other words, it shows the user what they are supposed to be working on at the moment. The Hot Sheet sort option sorts according to what has been set up on the Technician Settings page. Refer to the <i>Technician Administrator Guide</i> for more information on the Select the Hot Sheet sort order setting.
Work Order ID	Sorts the work orders by work order ID.
Priority	Sorts by the priority of the work orders.
Delay Status	Sort the work orders by delay status.
Service Status	Sorts the work orders by service status.
Assignment Scheduled	Sorts the work orders according to how they are scheduled, showing the soonest scheduled items on top.
PM Scheduled	Sorts by the upcoming date of the next PM due.

Expand/Collapse All Buttons and Task(s) Link

The **Expand All** button expands the view to show the tasks on the work orders as shown in the screenshot below.

 Note: The **+** and **-** buttons also expands and collapse the view to show the tasks associated with the work order. Upon clicking the **+** button, it becomes a **-** button, and vice versa.



The screenshot displays the Main Technician Portal interface. At the top, there are filters for Assignment Status (ALL, ASSIGNED, MY STAGE) and a Sort dropdown (Scheduled). Two buttons, 'Expand All' and 'Collapse All', are circled in red. Below this, a list of work orders is shown. The first work order (1-2016-41) is for SRV-CAR01, a 2006 JEEP GC-SRV01 JEEP GRAND CHEROKEE, with a scheduled time of 09/27/2016 12:30 PM. The second work order (1-2016-44) is also for SRV-CAR01, with an appointment of 09/27/2016 02:20 PM and a scheduled time of 09/28/2016 10:25 AM. Below the work orders, a section titled 'Symptom: OIL AND FLUIDS OIL AND FLUIDS' is shown. Underneath, a section titled 'Tasks not on Service Requests' lists two tasks: 'TH-PM-SERV-1 - TONYA'S PM SERVICE FOR EXCEPTION BASE PM CHECKLIST' and 'TH-PMSRV-001 - TONYA'S PM SERVICE FOR NON-EXCEPTION BASED PM CHECKLIST'. At the bottom, a third work order (1-2016-6) is shown for SRV-PEDBRIDGE, with a scheduled time of 09/29/2016 02:15 PM. The number of tasks for each work order is indicated by a link: '0 task(s)' for the first, '2 task(s)' for the second, and '+ 4 task(s)' for the third. The '+ 4 task(s)' link is circled in red.

The **Collapse All** button collapses the view to the higher level view of the work order list as shown in the screenshot below.

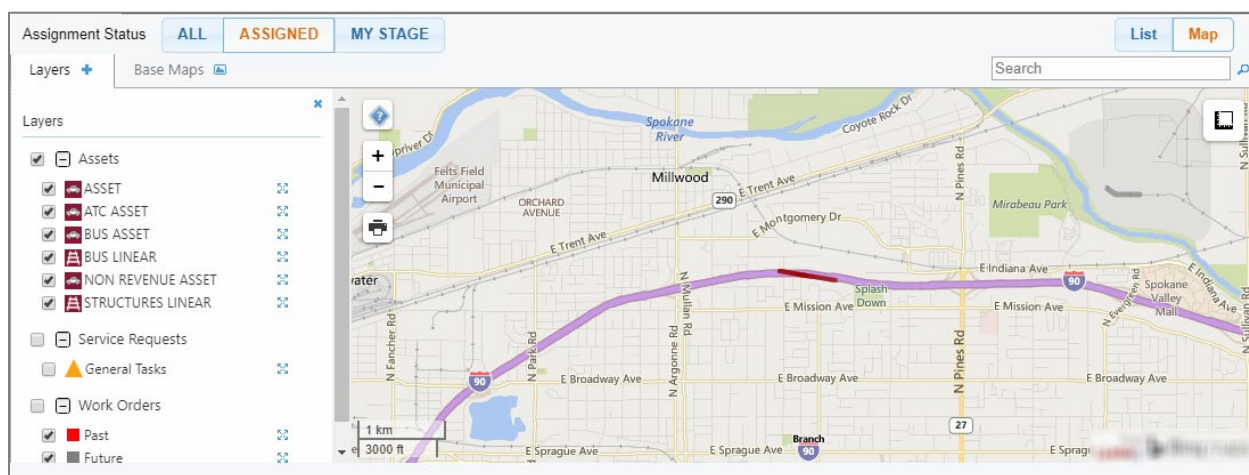
The number of tasks on the work order show as a link next to the **+/-** buttons. Click on the **# task(s)** link to expand or collapse the view to see or hide the work order tasks area and the tasks associated with the work order.

List and Map Buttons

Use the **List** and **Map** buttons to switch back and forth between a list view of your work orders and assignments, and a map view of the information. The default view for the Technician portal is the list. The **Map** view is described below as the list is described in the other My Work sections.



For more general information on using maps, refer to the *Mapping Administrator and User Guide*, or click the Help button in the top-left corner of the map to open the help page.



Layers: Check or uncheck items in the layers area to show assets, work orders, or service requests. You can check the group itself, for example Assets, to show all assets on the map, or just individual assets.

- **Assets:** This option displays all active assets whose repair location code match the current session location code selected in the Technician portal.
- **Work Orders:** This option displays time-based layers such as past, today, tomorrow, next week, etc. that can be toggled to help you find the work that is relevant based on your schedule.
- **Service Requests:** This option displays a single layer for general tasks which are service requests that are assigned to the current logged-in user, but do not have an asset ID assigned. These items use a yellow triangle icon to indicate each service request feature.

Base Maps: In the Base Maps tab, select the map provider you want to use for map tiles.

Work Order Tasks Area

The Work Order Tasks area displays when you click the **+** button, **Expand All** button, or the **# Task(s)** link. It shows all the tasks on the work order.

The clipboard  icon indicates the work order and/or task is assigned to you.

The  icon indicates that the task has a procedure defined for it. Clicking this icon will open a dialog to view the procedure information.

When a work order has a Service Request, the Service Request ID is displayed as a hyperlink. Clicking the hyperlink will take you to the Service Request Detail.

The **Start** button shows if the work order location is configured for labor entry method of real-time (or both).

1. Click **Start** to begin working on the task.

 You must be assigned to the task in order to start the task.

After starting the task, you are taken to the Current Job tab where a moving wrench  icon indicates the task you have started. Refer to the [Current Job Tab](#) section below for details about this tab.

2. Click the red task link to go to the Work Order Task page to update task and work order fields. Refer to the [Work Order Task Page](#) section for more information about this page.

Work Order Button and Additional Information

The work order button (this button is the work order number) and main work order information are shown on the **My Work Orders** tab. Click the Work Order button to go to the Work Order Main page. See the [Work Order Main Page](#) section below for more information about this page.

The screenshot shows the 'My Work Portal' interface. At the top, there's a header bar with 'My Work Portal' and a 'SAR' button. Below this, a summary section displays 'Work Order: 1-2015-5', 'Task Time Code: REG - REGULAR [Change]', and 'Task: CNINSPECT001 - INSPECTION 001 [Modify]'. The 'Equipment' field shows 'SRV-CAR1: 7897894569 2006 CHEVROLET BLAZER RED BLAZIN FIRE'. On the right, there's a '02h' timer and an 'Edit/St' button. Below the summary, there are three tabs: 'Current Job', 'My Work' (selected), and 'Requests'. Under 'My Work', there's a filter for 'Assignment Status' with options 'ALL' (selected), 'ASSIGNED', and 'MY STAGE'. A 'Sort' dropdown is set to 'Hotsheet'. There are 'Expand All' and 'Collapse All' buttons. The main list shows tasks. The first task is '1-2015-5' (highlighted with a red circle), 'SRV-CAR1 2006 CHEVROLET BLAZER BLAZIN FIRE', with 'Priority: Q0', 'Delay:', and 'Days Open/Left: 315/0'. Below it, there's a task for '1-2016-6' with 'Appointment: 03/23/2016 15:30' and 'SRV-PEDBRIDGE 1984 SRV MAN TEST CN-415 ART CENTER PEDESTRIAN BRIDGE'.

Faults Button

Click the **Faults** buttons to launch details about the Fault Codes. These buttons will only be visible if the related Asset on the page has one or more Fault Codes defined for its Equipment Type.

Technician Portal

Work Order: **SM-2019-22** Task Time Code: **STANDARD - STANDARD DIRECT** [Change]

2019 GILLIG PHANTOM: BRAKE SEIZING UP

Task: **001-000 - ELECTRICAL WORK GROUP - ELECTRICAL - CHANGE LIGHT BULBS** [Modify]

Equipment: **GI-PH-2019-0001: 2019 GILLIG PHANTOM==Meters: 1-0 MILES; 2-0 NONE==2019 GILLIG PHANTOM** 🔍

Current Job | **My Work** | Work Calendar | Crews | Equipment | Requests

Assignment Status: **ALL** | **ASSIGNED** | MY STAGE | Sort: Work Order ID ▼

5 task(s) | SM-2019-22 | **GI-PH-2019-0001 2019 GILLIG PHANTOM==Meters: 1-0**

Priority: 3 Delay: Days Open/Left: 2019 GILLIG PHANTOM: BRAKE SEIZING UP

Service Request: **GI-PH-2019-0001-379**

Symptom: SEIZING UP ROLLING STOCK BRAKE SYMP GROUP > BRAKE SEIZING UP

Description: BRAKE ISSUE NOTED BY OPERATOR, NEED TO INVESTIGATE RELATED F

Faults: B2424 J1939 J1939

Start 001-000 - ELECTRICAL WORK GROUP - ELECTRICAL - CHANGE LIGHT BULBS

Start 004-001 - BRAKE TASKS - RESET CONTROLLER

Start 004-002 - BRAKE TASKS - TEST CONNECTIONS

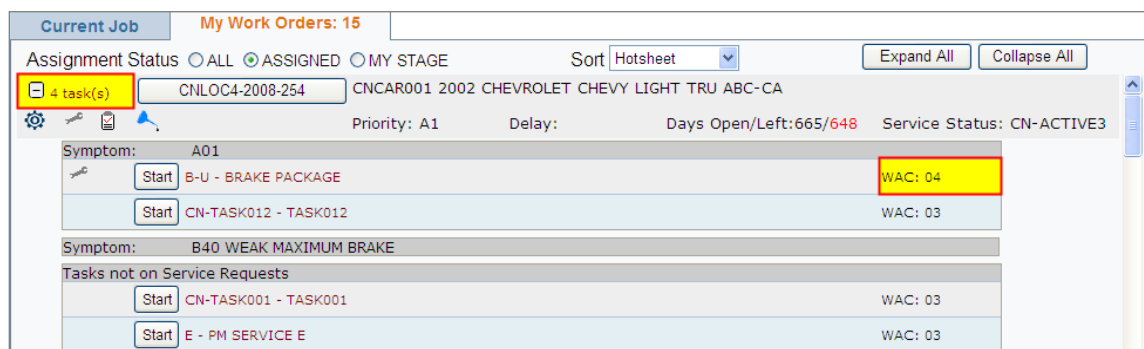
Start 004-003 - BRAKE TASKS - TEST BRAKE PADS

The following icons may also display to indicate information about the particular work order:

Item	Icon	Description
Parts Ready		Indicates the requested parts are ready for pickup. Click on this icon to go to the Parts History pop-in.  Note: It is the Parts Clerk's responsibility to clear the Notify flag once the parts have been picked up. Refer to the Parts History Pop-in section below for more information.
Jobbed-on		Indicates the logged-in user is currently working on the task within the work order.
Assignment		Shows the work order is assigned to you.
Preventive Maintenance		Indicates there is a preventive maintenance or inspection task on the work order.  Note: Blue represents a completed task and yellow indicates an incomplete task.
Pending Commercial Work		Indicates there is pending commercial work. This icon links to the Commercial Work History pop-in which provides the commercial purchase order line items on the work order. Please refer to the Commercial Work History Pop-in section for more information.
Warranty Unknown		Unknown if there is a warranty for this WO or task.

Item	Icon	Description
Warranty		This WO or task has work being done under a warranty.
Procedure		Indicates there is custom procedure information. Clicking the icon will open the Procedure & Comments viewer to allow review of the task's procedure without having to leave the page.

 When the shop location's settings require WAC codes on work order tasks, the Tasks to the left of the work order link are highlighted in yellow, to indicate that one or more tasks on that work order are missing final WAC status.



Current Job Tab

When you start a task, you are taken to the Current Job tab on the Main Technician page.

 The **Current Status** section displays detail when a user is logged into a task. The task that is highlighted green with a moving wrench next to it indicates that the technician is jobbed onto that task.

Technician Portal  SM - SPOKANE MAINTENANCE FACILITY

Work Order: **SM-2019-22** Task Time Code: **STANDARD - STANDARD DIRECT** [Change]

2019 GILLIG PHANTOM: BRAKE SEIZING UP

Task: **001-000 - ELECTRICAL WORK GROUP - ELECTRICAL - CHANGE LIGHT BULBS** [Modify]

Equipment: **GI-PH-2019-0001** 2019 GILLIG PHANTOM==Meters: 1-0 MILES; 2-0 NONE==2019 GILLIG PHANTOM 

Current Job | My Work | Work Calendar | Crews | Equipment | Requests

Priority: **3 - IMPORTANT** Service Status: **Due** 04/11/2019 12:11
 Asset No: License No: Unit In: 04/11/2019 12:10

Service Request: **GI-PH-2019-0001-379**

Select Symptom: **SEIZING UP - ROLLING STOCK BRAKE SYMP GROUP > BRAKE SEIZING UP** Parts
 Description: **BRAKE ISSUE NOTED BY OPERATOR, NEED TO INVESTIGATE RELATED F**
 Faults: **B2424 J1939 J1939**

  **Start** **001-000 - ELECTRICAL WORK GROUP - ELECTRICAL - CHANGE LIGHT BULBS** SRT: 2.00 WAC:

 **Start** **004-001 - BRAKE TASKS - RESET CONTROLLER** SRT: 5.25 WAC:

 **Start** **004-002 - BRAKE TASKS - TEST CONNECTIONS** SRT: 1.75 WAC:

 **Start** **004-003 - BRAKE TASKS - TEST BRAKE PADS** SRT: 0.50 WAC:

Tasks not on Service Requests **Parts**

 **Start** **TIR-02 - TIRE REPAIR GROUP - TASK: TIRE REPLACEMENT** SRT: WAC:

Add / Manage SRs New Task Start Task

Search Eq ID - License # - A

Actions **Comments**

View/Edit Detail Part Actions
 Equipment History Test Results
 Print Work Order
 Commercial Work Related Files
 Component Warranty Messages
 Start Delay Finish Work Order

00h 00m Indirect Time
 Edit/Stop Task Today's Time Card
 Clock Out

Heading Detail

The Current Job tab heading shows Priority, Asset Number, Service Status, License Number, Due Date/Time, and Unit In Date/Time.



Note: These vary based on equipment type and whether it is a part rebuild work order.

Task Selector Button

Click the **Select** button to go to the **Add Work Order Tasks** pop-in for the **Work Order Task Selector** page. See the [Work Order Task Selector Page](#) section below for more information about this page.

The screenshot shows the Technician Portal interface. At the top, there's a header with 'Technician Portal' and a pencil icon. Below it, 'Work Order' is 'QA-FULL-01-2021-94' and 'Task' is 'QA-RP-01 - QA REPAIR TASK 1'. To the right, 'Task Time Code' is 'QA-REG - QA'. Below this is a navigation bar with buttons: 'Current Job', 'My Work', 'Schedule', 'Crews', 'Equipment', and 'Requests'. Under 'Current Job', the 'Priority' is '02 - MED.PRIORITY - 3 DAYS'. The main section is titled 'Multi-asset Work Order Tasks' with a 'Reorder Tasks' button. Below this is a search bar labeled 'Search...'. A table lists tasks with columns: 'Labor' (containing icons), 'Task', 'WAC', and 'Task Order'. The tasks are QA-RP-01 through QA-RP-05, all labeled 'QA REPAIR TASK'. QA-RP-01 is highlighted in green and has a red square icon. The others have blue play button icons.

Labor	Task	WAC	Task Order
	QA-RP-01 - QA REPAIR TASK 1		1
	QA-RP-02 - QA REPAIR TASK 2		2
	QA-RP-03 - QA REPAIR TASK 3		3
	QA-RP-04 - QA REPAIR TASK 4		4
	QA-RP-05 - QA REPAIR TASK 5		5

Service Request Link

Click the **Service Request** link to go to the **Service Request/Defect** page. See the [Service Request/Defect Page](#) section below for more information about this page.

The screenshot shows the Service Request/Defect page. At the top is a navigation bar with buttons: 'Current Job', 'My Work', 'Work Calendar', 'Crews', 'Equipment', and 'Requests'. Below this, 'Priority' is '3 - IMPORTANT', 'Service Status' is 'Due', and 'Asset No' is 'License No'. The main section is titled 'Service Request: GI-PH-2019-0001-379'. Below this, there's a 'Select' button, a 'Symptom' field with 'SEIZING UP - ROLLING STOCK BRAKE SYMP GROUP > BRAKE SEIZING UP', a 'Description' field with 'BRAKE ISSUE NOTED BY OPERATOR, NEED TO INVESTIGATE RELATED F', and a 'Parts' button. Below these are 'Faults' listed as 'B2424', 'J1939', and 'J1939'. A table lists tasks with columns: 'Start' (containing icons), 'Task', 'SRT', and 'WAC'. The tasks are 001-000, 004-001, 004-002, and 004-003, all labeled 'BRAKE TASKS'. 001-000 is highlighted in green and has a green play button icon. The others have blue play button icons.

Start	Task	SRT	WAC
	001-000 - ELECTRICAL WORK GROUP - ELECTRICAL - CHANGE LIGHT BULBS	2.00	
	004-001 - BRAKE TASKS - RESET CONTROLLER	5.25	
	004-002 - BRAKE TASKS - TEST CONNECTIONS	1.75	
	004-003 - BRAKE TASKS - TEST BRAKE PADS	0.50	

Symptom Link

Click the **Symptom** link to go to the **Service Request/Defect** page. See the [Service Request/Defect Page](#) section below for more information about this page.

Current Job		My Work	Requests
Priority	Q0 - QA'S PRIORITY CODE		Service Status
Asset No	SRV01		License No
Select	Symptom: CN-SYMPOM-001 - DESCRIPTION: SYMPTOM 001 Description: SYMPTOM 001		
Select	SR Task: 001 - ELECTRICAL SYSTEM Symptom: QA-SYMP-CRACK - QA SYMPTOM FOR CRACK Description: SC TASK GENERATED		
Start	001 - ELECTRICAL SYSTEM		

Faults Button

Click the **Faults** buttons to launch details about the Fault Codes. These buttons will only be visible if the related Asset on the page has one or more Fault Codes defined for its Equipment Type.

Current Job	My Work	Work Calendar	Crews	Equipment	Requests
Priority	3 - IMPORTANT			Service Status	Due
Asset No				License No	Unit In
Select	Service Request: GI-PH-2019-0001-379 Symptom: SEIZING UP - ROLLING STOCK BRAKE SYMP GROUP > BRAKE SEIZING UP Description: BRAKE ISSUE NOTED BY OPERATOR, NEED TO INVESTIGATE RELATED F Faults: B2424 J1939 J1939				Parts
Start	001-000 - ELECTRICAL WORK GROUP - ELECTRICAL - CHANGE LIGHT BULBS			SRT: 2.00	WAC:
Start	004-001 - BRAKE TASKS - RESET CONTROLLER			SRT: 5.25	WAC:
Start	004-002 - BRAKE TASKS - TEST CONNECTIONS			SRT: 1.75	WAC:
Start	004-003 - BRAKE TASKS - TEST BRAKE PADS			SRT: 0.50	WAC:

The Procedures & Comments pop-in will display the Faults Detail.

Procedures & Comments	
Tasks	Faults
Service Request Comment	
Work Order Comment	
Service Request	GI-PH-2019-0001-379 - BREAK SIEZING UP
Fault Code	J1939 - J1939 NAME (v1)
Procedure	THE PROCEDURE TEXT FOR THE J1939 FAULT CODE. THE PROCEDURE TEXT FOR THE J1939 FAULT CODE. THE PROCEDURE TEXT FOR THE J1939 FAULT CODE. THE PROCEDURE TEXT FOR THE J1939 FAULT CODE. THE PROCEDURE TEXT FOR THE J1939 FAULT CODE. THE PROCEDURE TEXT FOR THE J1939 FAULT CODE. THE PROCEDURE TEXT FOR THE J1939 FAULT CODE.

Parts Button

Click the **Parts** button to go to the **Post Work Order Parts** pop-in. For more information about this page, please refer to the [Post Work Order Parts Pop-In](#) section below.

Current Job	My Work	Requests	
Priority	Q0 - QA'S PRIORITY CODE		Service Status
Asset No	SRV01	License No	PRINCESS1
Select	Symptom: CN-SYMP-T001 - DESCRIPTION: SYMPTOM 001 Description: SYMPTOM 001		Parts
Select	SR Task: 001 - ELECTRICAL SYSTEM Symptom: QA-SYMP-CRACK - QA SYMPTOM FOR CRACK Description: 3C TASK GENERATED		Parts
	Start	001 - ELECTRICAL SYSTEM	WAC:

New Fault Button – Fault Detail

Click the New Fault button to go to the Fault Detail. For more information about this page, refer to the Fault Detail section below.

Current Job	My Work	Work Calendar	Crews	Equipment	Requests	
Priority	3 - IMPORTANT			Service Status	Due	
Asset No				License No	Unit In	
Select	Service Request: GI-PH-2019-0001-379 Symptom: SEIZING UP - ROLLING STOCK BRAKE SYMP GROUP > BRAKE SEIZING UP Description: BRAKE ISSUE NOTED BY OPERATOR, NEED TO INVESTIGATE RELATED F Faults: B2424 J1939				Parts	New Fault
	Start	001-000 - ELECTRICAL WORK GROUP - ELECTRICAL - CHANGE LIGHT BULBS		SRT: 2.00	WAC:	

Fault Detail	
Fault Detail Basic Information Codes Readings Procedure	 Datetime Reported 07/16/2020 13:59 Reported By Service Request ID NISSAN-V-001-256 Service Request Status PENDING Basic Information Asset ID NISSAN-V-001 2012 NISSAN MURANO BLACK SUV CAR Fault Code ENGINE-HOT ENGINE FAULT - HOT Description APPEARS TO BE ALMOST OVERHEATING Datetime Occurred 16/07/2020 13:59 Service Request NISSAN-V-001-256 Severity Action Type Times Occurred 0 Codes Source Type Subsystem Subsystem Code Element Element Type Element Code Range Type Code Readings Meter 1 0 Latitude Longitude Direction Speed 0 Procedure CHECK ENGINE FLUIDS

The Fault Detail displays which allows you to create, edit or delete information on specific faults.

Tasks Area

The tasks on the service request are listed toward the top of the Current Job tab and the work order tasks are listed below. Tasks that are not listed on a service request are shown on the bottom. You may add, start, stop and edit tasks as well as manage service requests.

Standard Repair Time (SRT) is displayed which shows the configured labor time from the class/task record. This is the time it will take to complete the task once. This can be

configured on the Standards tab of the Class.Task Information screen in Enterprise Portal.

Work Accomplished Code (WAC) is also displayed if applicable.

 Settings may limit whether the **Add** task and **Start** task buttons show with the text box. This follows the same rules as the **Work Order Main** page.

Current Job	My Work	Work Calendar	Crews	Equipment	Requests
Priority	3 - IMPORTANT			Service Status	Due
Asset No				License No	Unit In
Select	Symptom: SEIZING UP - ROLLING STOCK BRAKE SYMP GROUP > BRAKE SEIZING UP Description: BRAKE ISSUE NOTED BY OPERATOR, NEED TO INVESTIGATE RELATED F				Parts
	Start	001-000 - ELECTRICAL WORK GROUP - ELECTRICAL - CHANGE LIGHT BULBS		SRT: 2.00	WAC:
	Start	004-001 - BRAKE TASKS - RESET CONTROLLER		SRT: 5.25	WAC:
	Start	004-002 - BRAKE TASKS - TEST CONNECTIONS		SRT: 1.75	WAC:
	Start	004-003 - BRAKE TASKS - TEST BRAKE PADS		SRT: 0.50	WAC:
Tasks not on Service Requests					Parts
	Start	TIR-02 - TIRE REPAIR GROUP - TASK: TIRE REPLACEMENT		SRT:	WAC:

Task Area Icons

The following icons may also display to indicate information about the tasks:

Name	Icon	Description
Parts Ready		Indicates the requested parts are ready for pickup. Click on the parts ready icon to go to the Parts History page. Refer to the Parts History Pop-in section below for more information about this page.
Moving Wrench		Indicates the task you are currently jobbed into.
Assignment Clipboard		Shows the task is assigned to you.
Oil Can		Indicates there is a preventive maintenance or inspection task on the work order. This icon can show in two different colors: blue represents a finished task and yellow represents an incomplete task.
PM Checklist Exception Failed		Indicates there is a preventive maintenance checklist item, which is exception-based, has failed.
Procedure		Indicates there is custom procedure information. Clicking the icon will open the Procedure & Comments viewer to allow review of the task's procedure without having to leave the page.

Work Order Task Area Functions

Work Order Tasks		WAC:
Start	A - PM-A	
Start	CNINSPECT005 - USE TO TEST 12 CHARACTER INSPECTIONS	
Start	CNINSPECT010 - USE TO TEST 12 CHARACTER INSPECTIONS	
Start	CNTASK001 - REPAIR TASK CNTASK001 - SUPPORT ALL ASSET/PRODUCT CATEGORIES	
Start	CNTASK002 - REPAIR TASK CNTASK002 - SUPPORT ALL ASSET/PRODUCT CATEGORIES	
Start	CNTASK003 - REPAIR TASK CNTASK003 - SUPPORT ALL ASSET/PRODUCT CATEGORIES	

- Click **Start** to start a task. This stops the current task if you are already logged onto a task.
- Click the **Task** link to go to the **Work Order Task** page. You may update task and work order fields on this page. Refer to the [Work Order Task Page](#) section below for additional information.
- Click **Add/Manage SRs** to go to the **Work Order Service Requests** page to assign/unassign a service request. Depending on your organization's setup, technicians may not be able to create service requests.

Note: A highlighted **Add/Manage SRs** button indicates there are unassigned service requests pending. Refer to the [Work Order Service Requests Page](#) section below for more information about this page.

- Click **New Task** to add a task to the work order. You are taken to the **Work Order Task Selector** page. See the [Adding a Task to Work Orders and Service Requests](#) section for more information about this page.
- If you know the Task ID, enter the task ID in the box and click the **Start Task** button to simultaneously start the task and add it to the work order.

If the shop location's settings require Work Accomplished Codes (WACs) on work order tasks, the WAC area is highlighted yellow when the task is missing a WAC.

Tasks not on Service Requests		WAC:
Start	A - PM-A	
Start	CNINSPECT005 - USE TO TEST 12 CHARACTER INSPECTIONS	
Start	CNINSPECT010 - USE TO TEST 12 CHARACTER INSPECTIONS	
Start	CNTASK001 - REPAIR TASK CNTASK001 - SUPPORT ALL ASSET/PRODUCT CATEGORIES	
Start	CNTASK002 - REPAIR TASK CNTASK002 - SUPPORT ALL ASSET/PRODUCT CATEGORIES	

Actions Tab Section

Actions	Notes	Comments
View/Edit Detail		Part Actions
Equipment History		Test Results
Print Work Order		
Commercial Work		Related Files
Component Warranty		Messages
Start Delay		Finish Work Order

The buttons displayed on the Main Technician Portal Actions tab will vary depending upon your configuration and the type of work order you are viewing, i.e., regular asset work order or part rebuild. Buttons that display on the Actions tab may include a combination of the following:

View/Edit Detail

Takes you to the Work Order Details page to review previously posted work and make necessary updates to the work order. See [Work Order Details Page](#) section below for information regarding this page.

Part Actions

Takes you to the Post Work Order Parts pop-in to perform various parts actions, e.g., parts issues and requests, etc. See the [Post Work Order Parts Pop-In](#) section below for more information regarding this page.

Work Order History

Shows previous work order history for the piece of equipment. See the [Work Order History Page](#) section below for more information regarding this page.

Test Results

Takes you to the Work Order Test Results page to associate test results with a work order and to enter test result data. From this page, you may also begin a new test result by selecting the test type and clicking the Start button. See [Work Order Test Results Page](#) section below for further information regarding this page.



Note: When finishing a Work Order, if any of the test results have a test type of "Feedback," these test results are not taken into account when determining if a work order can be closed. The Test Results button is highlighted yellow if a test result is pending or in progress for the work order.

Work Order Test Results				
Asset ID	RACAR100 - RA-SN-CAR-100 2012 HONDA CIVIC GRAY MOTOR POOL SEDAN LINEAR			
Station Location	RALOC2 - RICHARD'S TEST LOCATION #2	Repair Location	RALOC2 - RICHARD'S TEST LOCATION #2	
Work Order ID	RALOC2-2012-36	Job Status	OPEN	
Job Type	REPAIR	Unit In	12/13/2012 15:03	
Due	12/14/2012 15:03	Meter 1	610 MILES	
Meter 2	59 HOURS (NO EQ UPD)			
Existing Test Results: 1				
Test	Description	Started	Status	Approved and Closed
AUTO-BATTERY CHARGER	48 RECT./AUX/TPSS BATTER CHARGER PM	11/07/2013 08:50	IN PROGRESS	N
New Test				
Start a New Test: AUTO-BATTERY CHARGER		Start		
Back				

Print Work Order

Opens the Work Order Detail Report for printing. The technician must have access rights granted to access this report.

Serial Numbers

Displays the Serial Numbers page. This page allows you to add serial numbers to parts. See the [Serial Number Page](#) section below for more information regarding this page.



Note: This button will only display for internal rebuild work orders.

Work Order			
Part ID	82007004 - 1 - SHORT		
Work Order ID	LMLOC1-2007-72	Job Status	OPEN
Restock Location	LMLOC1 - LM LOCATION 1 - SHOP	Rebuild Quantity	1
Date and Time Opened	09/27/2007 13:58	Date and Time Due	09/27/2007 14:27
Quantity Completed	0		
Serial Numbers 1			
#	Completed?	Serial No	Comments
1	N	894450923	
Save Changes			
Add Serial No			
Serial No			
Comments			
Add			
Back			

Work Order Serial Numbers Page

Completion

This button takes you to the Work Order Part Release/Completion page. If items have been completed, they are listed on this page. Depending on UI settings, this page is for situations when some (but not all) of the parts are needed in inventory as soon as possible. See the [Work Order Part Release/ Completion Page](#) section below for more information about this page.



Note: This button will only display for internal rebuild work orders.

Home Tech		Admin Logout	
Work Order			
Part ID	CN SERIALPART010-1: SERIALIZED PART		
Work Order ID	CNLOC4-2007-211	Job Status	OPEN
Restock Location	CNLOC4 - CANG'S DEFAULT PARTS REPAIR LO	Rebuild Quantity	1
Unit In	12/05/2007 09:52	Due	12/05/2007 10:52
Current Stage	CN-SERIALPART010-001 @ CNLOC4		
Production Run ID	174	Date Required	
Quantity Completed	0		
Completion History			
No items completed			
Part Release / Completion			
Date Released	10/07/2010		
Qty			
Serial No			
Back		Save	

Commercial Work

Takes you to the Commercial Work pop-in where existing commercial work is listed and new commercial work may be entered by completing the fields and clicking the Save button. Click the **History** button on this pop-in to see commercial work history. The button turns yellow to indicate commercial work exists.

Post Work Order Commercial Work							
Add Commercial Posting - Line 1							
Service Request ID				☒ Post ☐ Request		☐ Reversal ☐ No Parts Needed	
Task ID		...		Lookup			
WAC		...					
Vendor ID		...					
Date							
Vendor Contract ID		...					
Labor Cost	\$			Taxable?	☐	Labor Hours	
Parts Cost	\$			Taxable?	☐		
Misc Cost	\$			Taxable?	☐		
Position		...					
Vendor Invoice				Invoice Date			
Account ID		...					
Fail/Cause ID		...					
Part ID		...					
Quantity Issued							
Repair Reason		...					
Comments							
Undo		Add					
Pending Commercial Postings							
Line	Task ID	Date	Vendor	Labor Cost	Parts Cost	Misc Cost	
Cancel		Save				History	

Related Files

The button displayed depends on your configuration. A highlighted **Related Files** button indicates there are related files associated with the work order. Click this button to open the **Work Order Files** page to see the associated files or to add a link to a file or report for the particular work order.

To add a link:

1. Click the **Add Link** button

The Add Link dialog displays.

Work Order Files			
Asset ID	CNCAR033: SNCAR033 2012 FORD F150 CAR 033		
Life Meter 1	3500 HOURS	Station Location	CNLOC1 - REPAIR SHOP 1
Repair Location	CNLOC1 - REPAIR SHOP 1		
Work Order ID	CNLOC3-2013-2	Job Status	OPEN
Job Type	REPAIR	Unit In	05/06/2013 16:35
Due	05/07/2013 16:35	Meter 1	120 HOURS
Tasks Completed	0 / 1 (0.00%)	Projected Completion Date	10/21/2015 15:36

Related File Links	

- Choose to upload a file, scan in a file, add a URL link, add a report link, or cancel.

Add Link

Upload File

Scan in File

Add URL Link

Add Report Link

Cancel

The subsequent dialog that displays will be one of the following (for more information, see the appropriate section directly below this list):

- **Upload File:** Enables you to upload a file with an optional title and description.
- **Scan in File:** Enables you to scan a file with a title and description.
- **Add URL Link:** Enables you to link to a network resource (e.g., a web site or a shared network file on your company's intranet).
- **Add Report Link:** Enables you to point to a Web Modules report (currently only Crystal Reports are supported).



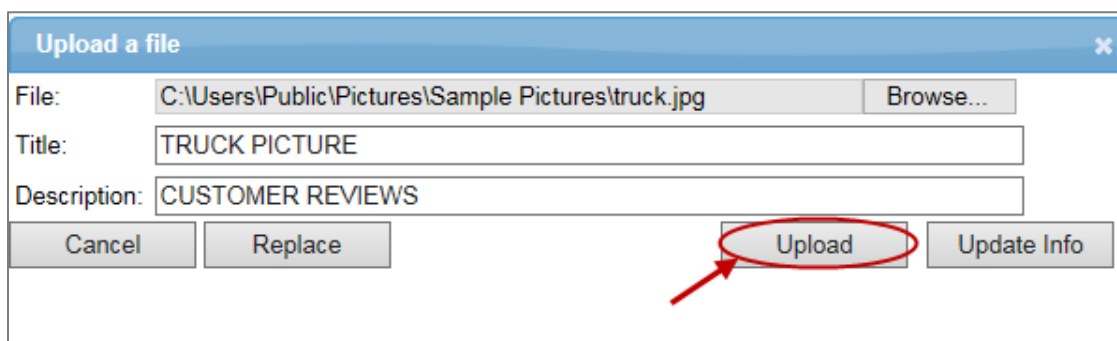
Note: For report links, farpt:/// is automatically added to the file name when you save.

- **Cancel:** Closes the dialog. You can also press Esc or click the X in the top right corner.

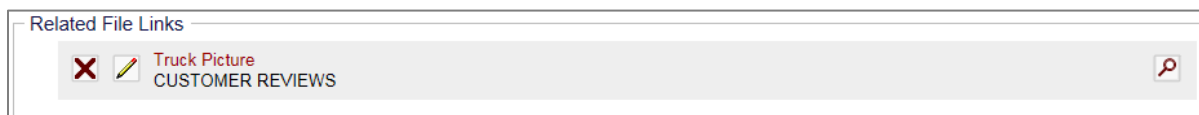
Upload File

1. Enter the file, title (optional), and description (optional).
2. Click **Upload** to upload the file.

 **Note:** As a precaution, do not upload .exe and .dll files, or extremely large files.



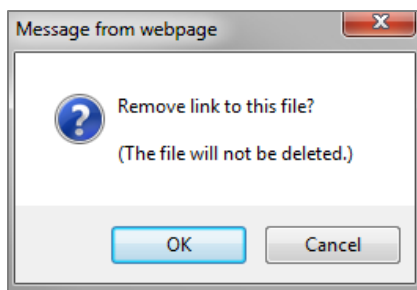
The file displays in the **Related File Links** section.



Once a file has been added, you may delete, update, or view the file as shown below:

3. Click the  icon to delete the link to the file.

A dialog will confirm that you want to remove the link to the file.



4. Click **OK** to remove the link.
5. Click the edit icon  to update the file.

The Upload a file Edit dialog displays with the following buttons:

Upload a file

Current Link:
faffle:///45fad6be-d76c-443f-aed0-68ead881cb47.jpg

Original Name: truck.jpg
File Type: image/jpeg, 15038 bytes
Uploaded: 10/21/2015 15:41 (GMT-7)

Title: TRUCK PICTURE
Description: CUSTOMER REVIEWS

Cancel Replace Update Info

- i. **Cancel:** Closes the dialog. You can also press **Esc** or click the **X** in the top-right corner.

Replace: Allows you to replace the uploaded file with a different uploaded file, but keep the same basic information.

Click the **Replace** button and a validation message displays.

Click **Yes**.

In the new **Upload a file** dialog, enter the new information and click **Upload**.

The original file is not deleted from the server, but unless you preserve the original faffle:/// URL, you will not be able to access the old file any more.

Update Info: Allows you to update the title and/or description. Enter the correct information and click the **Update Info** button.

Hover over the zoom  icon to view the file information and click the zoom  icon to go to the file.

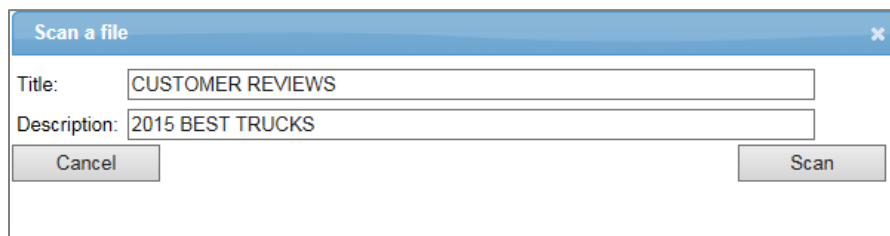
Click to view uploaded file:

Title: Truck Picture
Original name: truck.jpg
File type: image/jpeg, 15038 bytes
Uploaded: 10/21/2015 15:41 (GMT-7)

Customer Reviews

Scan in File

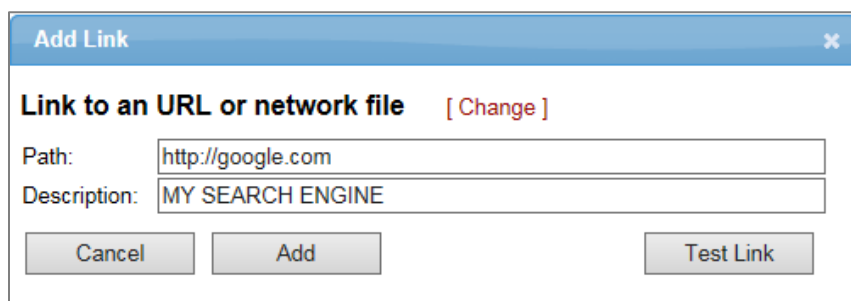
Click **Scan** to activate the ActiveX control to use a scanner to scan and upload an image. If the ActiveX control is not loaded, the **Scan** button is disabled.



A dialog box titled "Scan a file" with a close button (X) in the top right corner. It contains two text input fields: "Title:" with the value "CUSTOMER REVIEWS" and "Description:" with the value "2015 BEST TRUCKS". At the bottom, there are two buttons: "Cancel" on the left and "Scan" on the right.

Add URL Link

Enter Path and Description and click **Test Link** to test the link. Then click **Add** to add the link.



A dialog box titled "Add Link" with a close button (X) in the top right corner. It has a section header "Link to an URL or network file" followed by a "[Change]" link. Below this are two text input fields: "Path:" with the value "http://google.com" and "Description:" with the value "MY SEARCH ENGINE". At the bottom, there are three buttons: "Cancel" on the left, "Add" in the middle, and "Test Link" on the right.

The URL link displays in the Related File Links section:

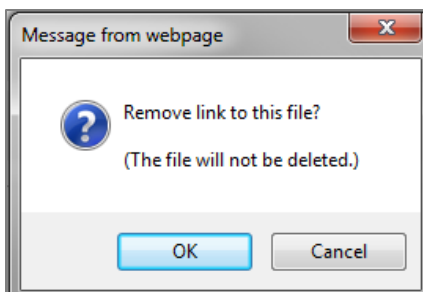


A section titled "Related File Links" containing a list of two items. Each item has a red 'X' icon, a pencil icon, and a magnifying glass icon. The first item is "Truck Picture" with the description "CUSTOMER REVIEWS". The second item is "http://google.com" with the description "MY SEARCH ENGINE".

Once a URL link has been added, you may delete, update, or view the link:

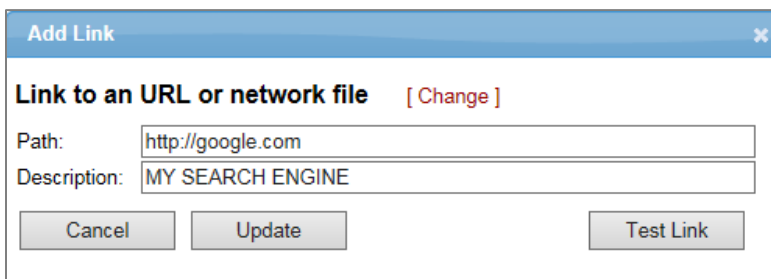
1. Click the  icon to delete the link.

A dialog will confirm that you want to remove the link.

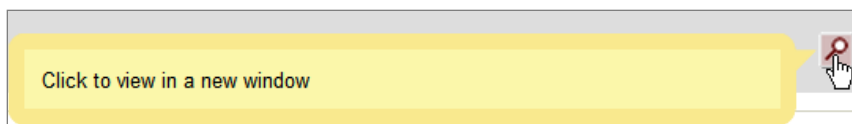


2. Click **OK** to remove the link.
3. Click the pencil  icon to update the link.

The Add Link Edit dialog displays where you may change, update, and test the link.



- **Change:** Allows you to select a different type of link.
- **Update:** Allows you to update the title and/or description. Enter the correct information and click the **Update Info** button.
- **Test Link:** Allows you to test the link.
- **Cancel:** Closes the dialog. You can also press **Esc** or click the **X** in the top right corner.
 - Hover over the zoom  icon to see the message to click the zoom  icon in order to view the URL link in a new window.



Add Report Link

The Add Report link enables you to point to a web modules report (currently only Crystal Reports are supported).



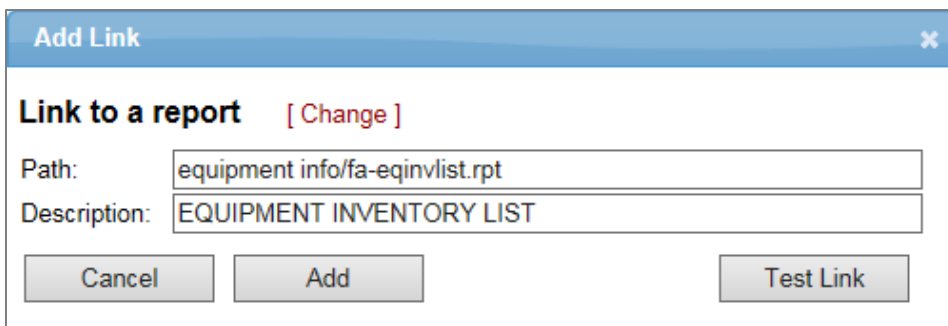
Note: For report links, `farpt:///` is automatically added to the file name when you save.

To add a link to a report:

1. From your web browser, copy the part of the report's URL that identifies the report. . This link contains the folder name (seen below as Shop Activity) and the name of the report (Work Order Detail.rpt).

For example:

- http://host/icapp/reporting/Shop Activity/Work Order Detail.rpt
becomes
 - Shop Activity/Work Order Detail.rpt
2. Paste the report identifier string (path) and description.
 3. Click **Test Link** to test the link.
 4. Click **Add** to add the report link.



The 'Add Link' dialog box has a title bar with a close button. Inside, the text 'Link to a report' is followed by a '[Change]' link. Below this are two input fields: 'Path:' containing 'equipment info/fa-eqinvlist.rpt' and 'Description:' containing 'EQUIPMENT INVENTORY LIST'. At the bottom are three buttons: 'Cancel', 'Add', and 'Test Link'.

The report link displays in the **Related File Links** section:

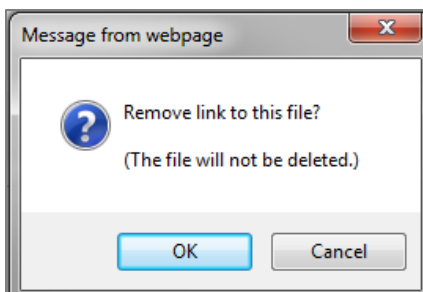


The 'Related File Links' section shows a list of three links. Each link row contains a red 'X' icon, a pencil icon, the link text, and a magnifying glass icon. The links are: 'Truck Picture CUSTOMER REVIEWS', 'http://google.com MY SEARCH ENGINE', and 'farpt:///equipment info/fa-eqinvlist.rpt EQUIPMENT INVENTORY LIST'.

Once a report link has been added, you may delete, update or view the link:

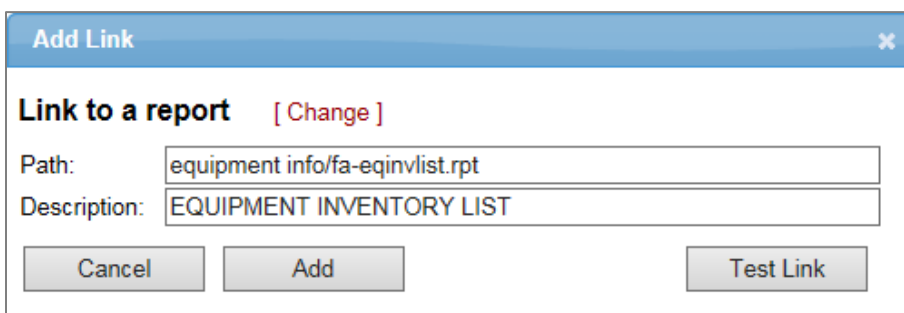
1. Click the  icon to delete the link.

A dialog will confirm that you want to remove the link.

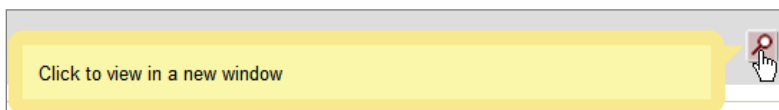


2. Click **OK** to remove the link.
3. Click the pencil  icon to update the link.

*The **Add Link** dialog displays where you may change, edit, update, and test the link.*



- Change – Allows you to select a different type of link.
 - Add - Enter the correct information and click the Add button.
 - Test Link – Allows you to test the link.
 - Cancel - Closes the dialog. You can also press Esc or click the X in the top right corner.
4. Hover over the zoom  icon to see the message to click the zoom  icon in order to view the report in a new window.



Component Warranty

The button displayed depends on your configuration. It is highlighted yellow if there is a component warranty. Click this button to open the Work Order Component Warranties page where the component types under warranty are displayed.

Work Order Component Warranties							
Equipment ID	6001-6000 SERIES FLEXIBLE						
Work Order ID	1132-2006-5738		Job Status		OPEN		
Job Type	PM		Assigned Technician				
Date and Time Opened	08/21/2006 16:33		Date and Time Due		08/22/2006 16:33		
Repair Location	1152 - KEDZIE GARAGE		Service Status		TT - TROUBLE TRACK		
Meter1	20						
Component Type	Vendor	Expiration Date	Expiration Meter 1	Deductible	Warranty Type	Expired	
ENGINE	ALPINE	09/01/2008	9999999	\$		N	
Task							
11B-001 - REMOVE MUFFIN CRUMBS FROM DRIVER SEAT/FLOOR/VENTS/GAS TANK							
TRANSMISSION	ALPINE	09/01/2008	0	\$1566.00		N	
Back							

Messages

Depending upon the settings, this button is highlighted yellow if there are messages associated with the work order. Click the **Messages** button to display a pop-in (as shown below) with notifications about the piece of equipment. This may include notifications of warranty coverage, comeback notifications, late/soon-due PM and inspection services, and other equipment-related information.

CNLOC2-2009-23 Messages						
OTHER OPEN WORK ORDERS						
WORK ORDER NUMBER	EST	TYPE	STATUS	REASON	PM	SERVICE
CNLOC2-2008-7		PM	OPEN		A	
CNLOC2-2008-16		REPAIR	OPEN	A		
UNIT IS 280 DAYS LATE FOR PM SERVICE A						
UNIT IS 235 DAYS LATE FOR INSPECTION SERVICE CNINSPECT001						
UNIT IS 205 DAYS LATE FOR INSPECTION SERVICE CNINSPECT002						
UNIT IS 174 DAYS LATE FOR INSPECTION SERVICE CNINSPECT003						



The Work Order Center screen's **Messages** tab allows users to see all warranty information when multiple warranties exist on an equipment unit.

Fleet Equipment ADMIN MODES CHANGE REQUEST HELP PREFERENCES

Search Reload Sort Select Filter Select Sort New Copy Delete Edit Save Cancel Export Report

Row #	Equipment ID	Model year	Manufacturer ID	Model ID	Equipment description
1	KGCAR1	1753	NEW FLYER	C40LF	WARNING - LEADING SPACE ON EQUIPMENT
2	00002	1979	NA	NA	FLAT CAR #2
3	00002C	1979	NA	NA	FLAT CAR #2

Equipment ID: KGCAR1 1753 NEW FLYER C40LF WARNING - LEADING SPA New equipment unit

Codes

Recurring Costs

Credit Cards

Acquisition

Registration

Multi-jurisdictional

Ownership / Depreciation

Warranty

Replacement /

Warranty

Warranty information

Row #	Delete	Vendor ID	Expiration date	Meter 1 expiration	Meter 2 expiration	Deductible	Warranty type
1	☐	KGVEVENDOR	06/01/2014	100000	100000	250.00	TYPE 1 - REGULAR WARRANTY
2	☐	KGVEVENDOR	04/20/2015	0	0	0.00	TYPE 2 - SPECIAL WARRANTY
3	☐	KGVEVENDOR	05/31/2020	100000	100000	2.00	TYPE 3 - EXTRA SPECIAL

Work Order Center ADMIN MODES CHANGE REQUEST HELP PREFERENCES

Search Reload Sort Select Filter Select Sort New Copy Delete Edit Save Cancel Export Report

GRID MAP

Row #	Work order ID	Job status	Equipment ID	Job type	Priority
1	RGLOCS-2013-238	PENDING	KGCAR1	PM	1

Work order ID: RGLOCS 2013 238 Equipment ID: KGCAR1 Job status: PENDING Current work delay

Basic Info

More Info

Messages

Comments

Notes

Standard Jobs

Tasks

Service Requests / Defects

Messages

Information about the work order or equipment unit View recent work orders

OTHER OPEN WORK ORDERS	WORK ORDER NUMBER	TYPE	STATUS	SCHEDULED	REASON	SERVICE
BUS111-2014-105	REPAIR	OPEN	SCHEDULED	J	A	
JHLOC1-2014-8	PM	OPEN		J		
RALOC-1-2015-144	REPAIR	OPEN		J		
RG-TESTLOC-2013-211	REPAIR	OPEN		J		
RG-MY LOC1-2014-123	REPAIR	OPEN		J		
RG-MY LOC1-2014-12	REPAIR	OPEN		J		
RG-MY LOC1-2014-76	REPAIR	OPEN		J		
RG-MY LOC1-2017-1	REPAIR	OPEN	10/31/2017 10:00	J		
RG-MY LOC1-2017-2	REPAIR	OPEN		J		
RG-TESTLOC-2013-25	REPAIR	OPEN		J		
UNIT HAS ADDITIONAL WORK ORDERS OPEN						
UNIT IS 1684 DAYS LATE FOR PM SERVICE KGPMSCV1 - DUE DATE 11/07/2013						

Work Order Center Messages tab displays all warranties for equipment including Type, Expiration, Meter 1 and Meter 2

Start Delay

This button takes you to the Choose a Work Order Delay page where you can enter a comment (optional), and start work delays. If there is currently a delay on the work

order, this button reads **Stop Delay**. If there is no delay on the work order, the button reads **Start Delay**.

Choose a Work Order Delay Code

Equipment ID	CNCAR001	SN-CNCAR001 2002 CHEVROLET CHEVY LIGHT TRU BLACK ABC-CA
Asset Number	AN-CNCAR001	Station Location CNLOC2 - WORK ORDER LOCATION License Number ABCDE12345
Work Order ID	CNLOC4-2008-254	Job Status OPEN
Unit In	01/18/2008 11:22	Due 01/18/2008 11:52
Repair Location	CNLOC2 - WORK ORDER LOCATION	Service Status CN-ACTIVE3 - ASSET CATEGORY

Comment

(A) VEHICLE IN SERVICE	(PP) WAITING PARTS NOT AT LOC
(AA) TEST DELAY CODE	(PV) WAITING PARTS VENDOR BKORDR
(B) WAITING FOR BAY	(S) WAITING FOR SHOP EQUIPMENT
(E) WAITING AT EVERETT REPAIR	(T) WAITING FOR TOW
(EQONLY) EQUIPMENT WOS ONLY	(TRANS) TRANSFER USER RESPONSIBILIT
(L) WAITING FOR LABOR	(TRANSP) TRANSFER SHOP RESPONSIBIL
(M) WAITING FOR VENDOR	(TS) TRANSFER SHOP RESPONSIBILITY
(OTHER1) WAITING OTHER 1	(TU) TRANSFER USER RESPONSIBILITY
(P) WAITING PARTS TRANSFER	(Z) WAITING OTHER
(PE) WAITING PARTS EVERETT REBUILT	

Back

- ✓ Options for setting up work delay codes are found on the Work Delay Codes screen (Shop Activity > Setup > Work Delay Codes).

Work Delay Codes

Search Reload Sort Select Filter Select Sort New Copy De

Row #	Work delay ID	Description	Applies to equipment work orders

Basic Info

Work delay ID

Basic Info

Description

☐ Applies to equipment work orders
☐ Applies to part rebuild work orders
☐ Applies to linear work orders
☐ Stop shop downtime when work order is in delay for this reason
☐ Stop user downtime when work order is in delay for this reason
☐ Active

Administrators may set the Work Delay Codes options as desired based on the following settings:

- **Applies to equipment work orders:** If this field is checked, the work delay code applies to equipment-related work orders.
- **Applies to part rebuild work orders:** If this field is checked, the work delay code applies to part rebuild work orders.

- **Applies to linear work orders:** If this field is checked, the work delay code applies to linear work orders.
- **Stop shop downtime when work order is in delay for this reason:** If this field is checked, shop downtime is stopped while the work delay is in effect. Shop downtime restarts automatically once the delay has been lifted unless there is a check in the No downtime will accumulate for open work orders with this status field on the Basic Info tab of the Service Statuses screen (Setup > Shop Activity > Service Statuses). Downtime restarts only if both the service status and the current delay (if any) specify that it should.



Note: This option only affects *shop* downtime.

- **Stop user downtime when work order is in delay for this reason:** If this field is checked, user downtime is stopped while the work delay is in effect. User downtime restarts automatically once the delay has been lifted.



Note: This option only affects *user* downtime.

- **Active:** If this field is checked, the work delay ID is active and will display in choice-lists.

Finish Work Order

Takes you to the [Work Order Finish Page](#) to review any pending items and/or to continue to the **Work Order Detail** page. The **Work Order Detail** page is where you review previously posted work and place the work order into a finished status. See [Work Order Detail Page](#) section below for information regarding this page.



Access to this button is based on the user's control rights in the GUI. Depending on control rights, the button may be enabled, hidden, or disabled.

Work Calendar Tab

The schedule tab displays assigned work for the week or month, depending on the chosen view. To view the schedule, from the main Technician page, click the **Schedule** tab.

To see assignments on the calendar, the assignments must have a date scheduled. There must also be an estimated number of hours on the work order or its tasks in order to show a time range and display on the calendar.

My Work Portal 1 - OPS

Labor Status NONE Session Time Code REG - REGULAR [Change]

Indirect Time
Edit/Stop Task Today's Work Log
Clock Out

Current Job My Work **Work Calendar** Crews Equipment Requests

< > Today Jun 10 - 16, 2018 Weekly Monthly

	Sun 6/10	Mon 6/11	Tue 6/12	Wed 6/13	Thu 6/14	Fri 6/15	Sat 6/16
8 AM							
9 AM							
10 AM							
11 AM							
12 PM							
1 PM							
2 PM			TEAM MEETING - REG				
3 PM							
4 PM							

Search Eq ID - License # - Asset # - VIN - Rebuild Part ID ... Go

Main View Function buttons

The main view function buttons allow you to choose whether to view week or month, and move forward and back to see different weeks or months.

My Work Portal 1 - OPS

Labor Status NONE Session Time Code REG - REGULAR [Change]

Indirect Time
Edit/Stop Task Today's Work Log
Clock Out

Current Job My Work **Work Calendar** Crews Equipment Requests

< > Today Jun 10 - 16, 2018 Weekly Monthly

	Sun 6/10	Mon 6/11	Tue 6/12	Wed 6/13	Thu 6/14	Fri 6/15	Sat 6/16
8 AM							

Arrow Buttons

Click the arrow buttons to move forward or back in either the week or month view.

The screenshot shows the 'My Work Portal' interface. At the top, there's a header with 'My Work Portal' and a dropdown menu set to '1 - OPS'. Below this, there are fields for 'Labor Status' (NONE) and 'Session Time Code' (REG - REGULAR [Change]). To the right, there are buttons for 'Indirect Time', 'Edit/Stop Task', 'Today's Work Log', and 'Clock Out'. Below these are tabs for 'Current Job', 'My Work', 'Work Calendar' (highlighted in orange), 'Crews', 'Equipment', and 'Requests'. The main area displays a calendar for 'Jun 10 - 16, 2018'. Navigation buttons include '<', '>', and 'Today'. The 'Weekly' and 'Monthly' view buttons are also present. The calendar grid shows days from Sun 6/10 to Sat 6/16, with a time slot for 8 AM.

Today Button

When you are viewing a week or month that does not include today, click the Today button to move back to the week or month today falls into.

This screenshot is identical to the previous one, but the 'Today' button in the navigation area is circled in red. The calendar view remains 'Jun 10 - 16, 2018'.

Week and Month Buttons

This screenshot is identical to the previous ones, but the 'Weekly' and 'Monthly' view buttons are circled in red. The calendar view remains 'Jun 10 - 16, 2018'.

Calendar Views

There are two views in the calendar in the Technician portal. You can view either the week or month. Continue below for more information on these two views.

Week View

The week view shows the assigned work according to week. Scroll up and down to see assigned work by hour. The following calendar details display as follows:

- The current day is highlighted in blue.
- The current hour shows as a blue line across the week.

		Dec 3 - 9, 2017						Weekly Monthly	
	Sun 12/3	Mon 12/4	Tue 12/5	Wed 12/6	Thu 12/7	Fri 12/8	Sat 12/9		
9 AM									
10 AM									
11 AM			WASH SHOP FLOOR - DI						
12 PM	DI	DI	XANDE DI LOC- 2017-2	EAM- 5553 XAND	DI	DI	DI		
1 PM			AW-EQ- 001						
2 PM									
3 PM			EAM-5553 XANDER- LOC-2017- 278: 013-107 AW-EQ-001 042-407						
4 PM									
5 PM									

To view more information on an assignment:

1. To get basic information on the assignment, hover over the assignment.

		Dec 3 - 9, 2017			
	Sun 12/3	Mon 12/4	Tue 12/5	Wed 12/6	
9 AM					
10 AM					
11 AM			WASH SHOP FLOOR - DI		
12 PM			DI	EAM- 5553 XAND	DI
1 PM					
2 PM					
3 PM			EAM-5553 LOC- 2017- 278: 013-107 AW-EQ-001		
4 PM					

Basic information displays for that assignment

- To get more detailed information, click the assignment.

The system switches to the My Work tab to. The system causes the work order to fade in and out to highlight the work order associated with that assignment to make it easy to find.

Assignment Status		ALL	ASSIGNED	MY STAGE	Sort	Hot Sheet	Expand All	Collapse All
+ 2 task(s)	1-2017-6	SRV RAILROAD		0 SRV RAIL TRACK 2017				
		Priority: 3	Delay:	Service Status:				
		SRV RAIL REPAIR						
+ 4 task(s)	1-2017-23	SRV-CAR01		2006 JEEP GRAND CHEROKEE JEEP GRAND CHEROKEE				
 		Priority: 3	Delay:	Days Open/Left: 43/0	Service Status:			
+ 2 task(s)	1-2017-36	SRV-CAR03		2017 JEEP GRAND CHEROKEE JEEP GRAND CHEROKEE LIMITED				
		Priority: 4	Delay:	Days Open/Left: 16/0	Service Status:			
+ 3 task(s)	1-2017-38	Scheduled: 04/05/2017 07:00						
		SRV-CAR01		2006 JEEP GRAND CHEROKEE JEEP GRAND CHEROKEE				
		Priority: 1	Delay:	Days Open/Left: 16/0	Service Status:			
+ 2 task(s)	1-2017-41	SRV-CAR01		2006 JEEP GRAND CHEROKEE JEEP GRAND CHEROKEE				
		Priority: 3	Delay:	Days Open/Left: 15/0	Service Status:			

- Click the work order to open it and see more detailed information.

Month View

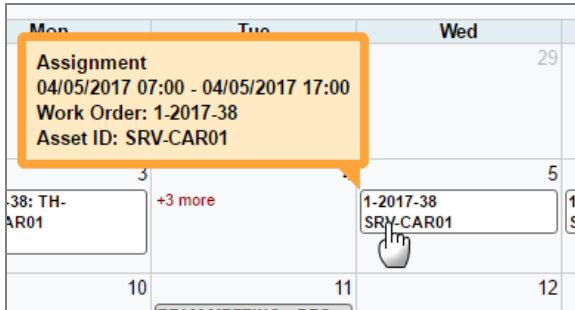
The month view shows the assigned work according to month. The following calendar details display as follows:

- The current day is highlighted in blue

< >		Today		April 2017			Week	Month
Sun	Mon	Tue	Wed	Thu	Fri	Sat		
26	27	28	29	30	31	1		
		TEAM MEETING - REG						
2	3	4	5	6	7	8		
	1-2017-38: TH-SRV-CAR01 TH-	+3 more	1-2017-38 SRV-CAR01	1-2017-36 SRV-CAR03				
9	10	11	12	13	14	15		
		TEAM MEETING - REG						
16	17	18	19	20	21	22		
		TEAM MEETING - REG						
23	24	25	26	27	28	29		
		TEAM MEETING - REG						
30	1	2	3	4	5	6		
		TEAM MEETING - REG						

To view more information on an assignment:

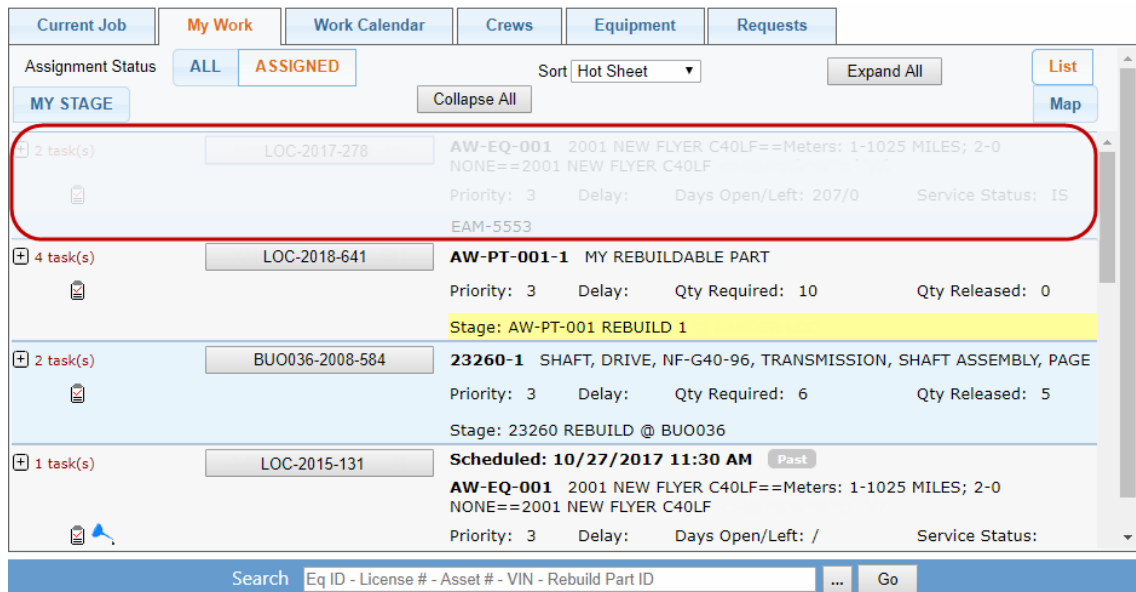
1. To get basic information on the assignment, hover over the assignment.



Basic information displays for that assignment

2. To get more detailed information, click the assignment.

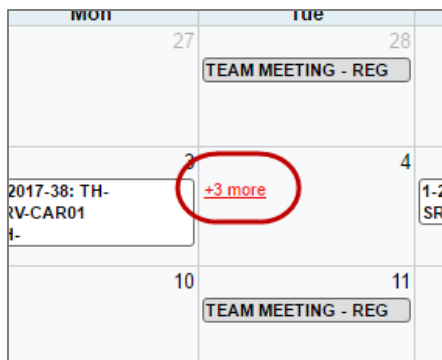
The system switches to the My Work tab to. The system causes the work order associated with that assignment to fade in and out to highlight the work order associated with that assignment to make it easy to find. If no work order is found for the item, this redirects to Work Order Postings, Service Request Detail, or the Multi-Asset Work Order pages.



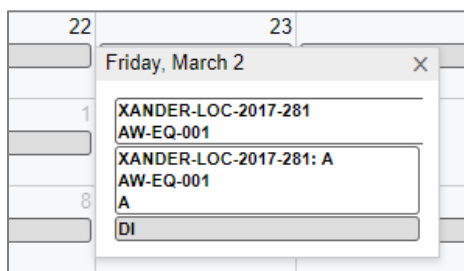
3. Click the work order to open it and see more detailed information.

To view hidden items on the calendar:

1. Click the red **+#** link.



The detail for that day displays.



2. Hover over the item for basic details.
3. Click the item to go back to the work order list, to open the work order as described above.

Crews Tab

This tab will only display for the designated crew foreman as set in the system.



A supervisor will be required to identify the crew foreman on the Crews screen.

Basic Info

Description

Location ID

Shift ID

Crew foreman

Calendar ID

☐ Can be scheduled

Date and time available for sc

This allows the crew foreman to manage the employees on his crew conveniently from his own work portal. Work order assignments can have multiple crews assigned to

them. Actions can be performed for multiple employees by checking the boxes for the employees and clicking the **Update Selected Employees** button.

Postings	Employee ID	Employee Name	Current Task	Jobbed On Date/Time	Elapsed Time On	Action	Timesheet
☐	SRV03	SHAWNA VICKS			0.00	Stop Task	View Time
☐	SRV02	SHARON VICTOR			0.00	Stop Task	View Time

Start Task

This action is enhanced for the crew foreman and allows them to review the task details before clicking the **Select Employees** button to assign the work. The **Select Employees** button will bring up a list of the members of his crew.

If you are a foreman and starting a task yourself, once you click **Start Task** and the Work Order Task page opens, then you can click save without assigning another employee. This starts the task for you under your **Current Job** tab. This method of a foreman starting a task does not add a crew code on your labor entry.

Stop Task

This task has also been enhanced to job off employees that are working on the same task and are in the same crew as the foreman.

Actions

The following controls are available on the tab:

- A drop-down list of crews, as a foreman can be in charge of multiple crews.
- An employee selection field to add to crew. **Add To Crew** and **Remove From Crew** from button allowing employees to be added and removed from the foreman's crew.
- **Crew Time Entry** button allows the foreman to open the Crew Postings pop-in with full functionality.

- An override datetime text field to handle setting times on clock in/out and stop task.
- A table that displays every employee's status on the crew. Specific employee timesheets can be viewed from this table.

Choose an Employee

Show Filter

Current Filter: Assigned Location: ACLOC1 x Direct Employees: N x

Assigned Location: ACLOC1 Shift: Search

Employee Search Count: 8

Search:

EMP-AC - ANTHONY CARTWRIGHT

EMP-AC2 - ARTHUR CARTWELL

EMP-AC3 - ALEX CARTWELL

EMP-AC4 - 4 CARTWELL

EMP-AC5 - 5 CARTWELL

EMP-AC6 - 6 CARTWELL

EMP-AC7 - 7 CARTWELL Select

EMP-AC8 - 8 CARTWELL

Employee Detail

EMP-AC7 - 7 CARTWELL

Time Code Capacity Hours 8.50

Today's Timesheet(Hrs) 0.00 Non-work Activity Hours 0.00

Skills Hours Available 8.50

Assigned Hours 0.00

Work Order	Task	Posted Hrs	Most recent posting
12201: RAIL CARRIER TRUCK			
ACLOC1-2014-12	WE2-A-12201	0	

< 02/02/2015 >

13:00	
14:00	
15:00	

Equipment Tab

This tab displays assigned equipment for the logged-in user, or, if the user is a crew lead, that user can also see assigned equipment for their crew. Your organization must have the Allocation and Assignment module licensed to access this tab.

My Work Portal

MAIN - MAIN LOCATION

Labor Status: INDIRECT TIME Task Time Code: REG - REGULAR [Change]

Task: IND-17 - NOT USED

Comment:

79h 12m Indirect Time

Edit/Stop Task Today's Time Card

Clock Out

My Work Work Calendar Crews **Equipment** Requests

Crew Lead Assigned Equipment

OPERATOR S

Crew Members Assigned Equipment

CAR11

Search: Eq ID - License # - Asset # - VIN - Rebuild Part ID Go

Requests Tab

The requests tab shows all requests, whether part or commercial, which are assigned to the logged-on user.

My Work Portal SARAH VICKERS (SRV) 1 - OPS

Labor Status NONE

Indirect Time

Edit/Stop Task Today's Timesheet

Current Job My Work Schedule Crews **Requests**

Filter

Enter Filter Text

Requests

Notifications	Type	Status	Work Order ID	Equipment ID	Priority	Qty	Part ID - Desc
	PART	PENDING	1-2017-41	SRV-CAR01			1 SRV-WIPER01-0 - BLADE-WIPER; BLADE, WIPER, SIZE
	PART	PENDING	1-2017-38	SRV-CAR01			1 SRV-WIPER01-0 - BLADE-WIPER; BLADE, WIPER, SIZE

Showing 2 records

Search Eq ID - License # - Asset # - VIN (%last6) - Rebuild Part ID ... Go

The requests table includes the following columns: Notifications, Type, Status, Work Order ID, Equipment ID, Priority, Qty, Part ID-Desc, Comment, Action Comment, Date Requested, Date Expected, Date Received, Vendor ID, Requested By, Qty Avail?, Request ID, and Action.

The following list describes some extra detail for certain column features:

- **Notifications:** table shows icons according to request statuses. These icons are shown in the table below with more detail.
- **Status:** This is the status of the part request. These statuses are from the part request and can be seen also on the Parts Requests screen, Parts Information tab, Status column. Statuses available are as follows:
 - PENDING: The part order is pending.
 - PENDING CML: The commercial order is pending.
 - ORDERED: The parts requested have been ordered and are waiting to be received.
 - RECEIVED: Ordered parts have been received.

- **Work Order ID:** Click the red link to open the Work Order Details screen for the associated work order.
- **Action:** This column holds the Cancel button. Click **Cancel** to cancel a part request.

Requests Table

The following are icons that can display in the Notifications column of the Requests table.

Item	Icon	Description
Parts Ready		Indicates the requested parts are ready for pickup. Click on this icon to go to the Parts History pop-in.
Pending Part Request		The pending part request icon may also appear in the task row. This icon indicates that pending part request exist. See the Pending Part Request Icon section below for more information about pending part requests.
Pending Commercial Work		Indicates there is pending commercial work. This icon links to the Commercial Work History pop-in which provides the commercial purchase order line items on the work order. Please refer to the Commercial Work History Pop-in section for more information.

Other Actions

Other actions available on the Requests tab include the following:

- Click the red link in the Work Order ID column to open the work order for that service request.
- Click **Cancel** (by default, the Action column in the furthest right column in the table) to cancel the service request.
- Use the filter field to pare down the requests to find the request you need easier.

Search Field

Start a new work order, or look up existing open work orders by entering or scanning an equipment ID, license number, asset number, VIN, or rebuild part ID (without the suffix) in the Search field.

Search

...

Go

 Note: The label displayed here (as well as the fields that are searched) is based on your settings.

To search in the Search field:

There are a variety of ways to search for items in the **Search** field.

- Type an asset ID, asset number, VIN, license number, etc. into the **Search** field and click **Go**. This can include a partial match using % such as SRV% that will return assets that start with SRV. Search supports the wildcards "*" and "%".

Entering a Rebuild Part ID takes you to the New Work Order page for Rebuildable Parts. Refer to the [New Work Order Page for Rebuildable Parts](#) section for more information.

 Note: The equipment and location lookup functions only show data allowed by location security.

 Note: If an Equipment ID, License Number, Asset Number, or VIN has more than one asset with the same value, the user is directed to the Found Equipment Units Matching page to pick the desired item. When you pick an item, you are directed to the specific page as outlined in the setup scenarios below.

Found 4 Equipment Units Matching %						
Equipment ID	Asset Number	License Number	Serial Number	Year	Make/Manufacturer	Model
RAILROAD				0		
CAR01	ASSET001	SPOKAN01	100-JGC-1987	2006	JEEP	GRAND CHEROKEE
CAR02			2345678910	1997	CHEVROLET	BLAZER
CAR03			ABC1234567	2017	JEEP	GRAND CHEROKEE

Back

- If multiple items match, pick the correct item from the list. When you pick an item, you are directed to the specific page as outlined in the setup scenarios below.
- You can search for an exact, valid Work Order in the Search bar. The specified landing page will open after entering an exact, valid Work Order ID. While it defaults to the current labor method flow, you can choose which work order landing page is navigated to in Location Settings for the Technician Portal.
 - To enable users to search for a Work Order, check the Work Order box on the "Search to include the following fields:" option in the Technician Portal

Settings under the Common Settings section. This is un-checked by default.

- You may also click the  button to use the Asset Chooser to select an equipment ID. For more information on the Asset Chooser, refer to the *General Application Information Guide*.

The Work Management Page opens. This is where work orders and service requests are displayed (if any exist) for the asset.

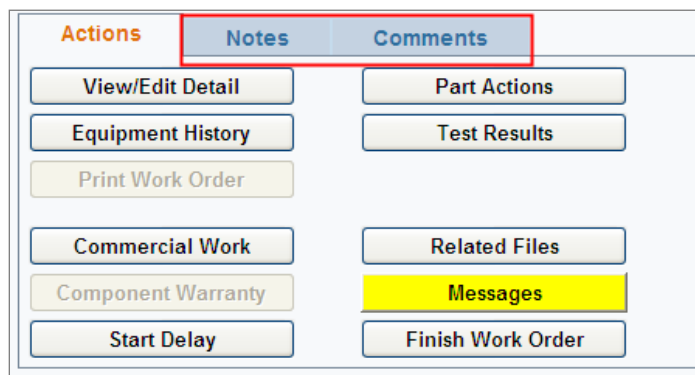
Your setup options determine what happens next

If there are no work orders, the user is directed to the Equipment Management page and may create a new PM work order or a new Repair work order for that Equipment ID. Refer to the [New Work Order Pages](#) sections below for more information about these pages.

According to your setup, you will be able to perform the following tasks:

- If your setup allows only one OPEN work order for an asset:
 - If the asset you enter has an open work order, the user is taken directly to the Equipment Management page to select the work order. The user is then directed to the Work Order Main Page or Work Order Details Page.
 - If there are multiple work orders, the user chooses a work order from the list of open work orders. The user is directed to the Work Order Main Page or Work Order Details Page.
- If your setup allows more than one OPEN work order per asset:
 - If the asset you enter has any open work orders, you are taken to the Equipment Management page. This page lists open work orders for the asset and you may choose the desired work order or create a new work order. See the [Equipment Management Page](#) section below for more information about this page.
 - If there are no open work orders, you are taken to the Equipment Management page where you can create a new work order. See the [New Work Order Pages](#) sections below for more information about creating new work orders.

Comments/Notes Tabs

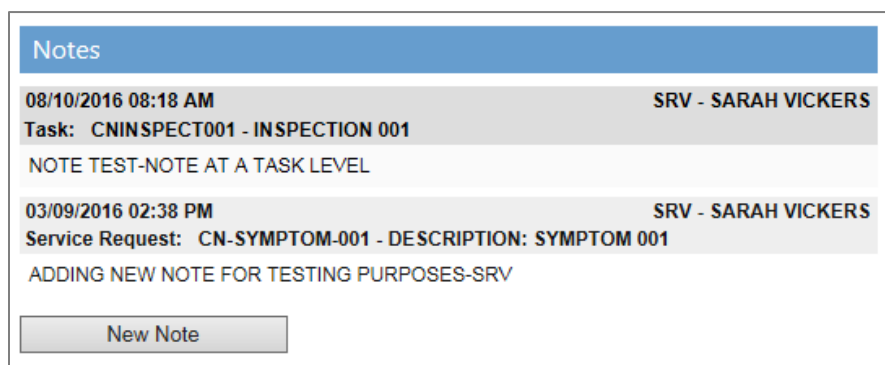


Actions	Notes	Comments
View/Edit Detail	Part Actions	
Equipment History	Test Results	
Print Work Order		
Commercial Work	Related Files	
Component Warranty	Messages	
Start Delay	Finish Work Order	

The tab displayed depends on your configuration. Select the desired tab to view or add a note or comment to the work order. The tab is highlighted yellow to indicate that a note or comment exists for the work order. Once added, notes cannot be deleted. Comments may be edited or deleted as desired.

Add a Note

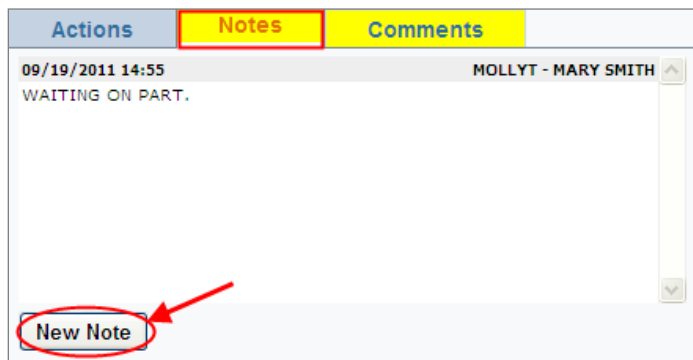
Throughout Shop Activity, you may add notes at the work order and task levels as shown in the following screenshot.



Notes	
08/10/2016 08:18 AM	SRV - SARAH VICKERS
Task: CNINSPECT001 - INSPECTION 001	
NOTE TEST-NOTE AT A TASK LEVEL	
03/09/2016 02:38 PM	SRV - SARAH VICKERS
Service Request: CN-SYMPTOM-001 - DESCRIPTION: SYMPTOM 001	
ADDING NEW NOTE FOR TESTING PURPOSES-SRV	
<button>New Note</button>	

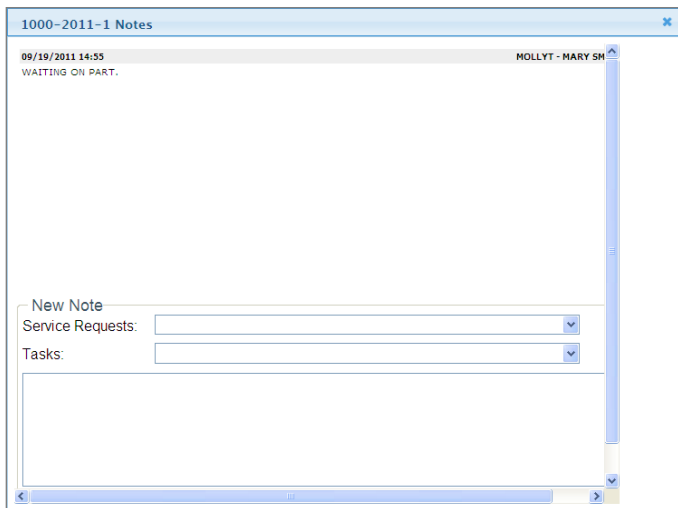
To add a note to the work order:

1. Select the **Notes** tab and click the **New Note** button.



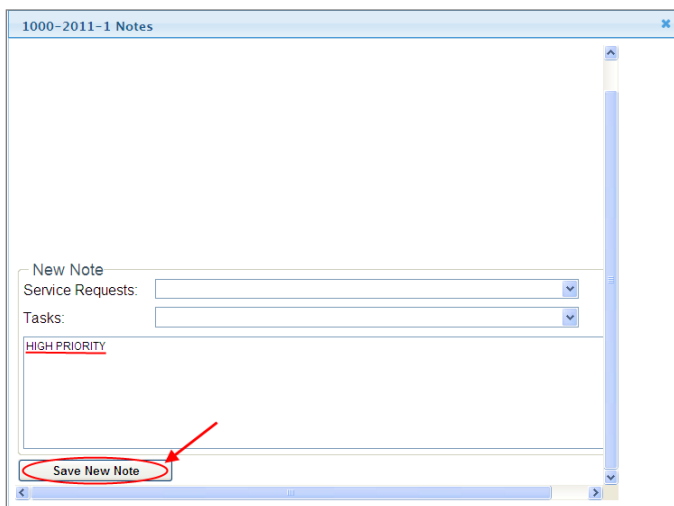
Actions	Notes	Comments
09/19/2011 14:55 MOLLYT - MARY SMITH		
WAITING ON PART.		
New Note		

*The **Notes** pop-in displays. Previously entered notes, if any, are listed at the top of the pop-in.*



*The **Service Requests** and **Tasks** drop-downs default based on where you clicked on the **New Note** button. In this example, they default to blank, but if service requests or tasks exist for a work order, they are available to select from the drop-down lists. When you select a service request, the task drop-down list automatically updates with the tasks related to that service request.*

2. Enter the work order note and click the **Save New Note** button as shown in the screenshot below.



- On the Technician Main page, the new note displays at the top of the notes list with a **Successful update** message.

Actions Notes Comments

08/10/2016 08:21 AM SRV - SARAH VICKERS
Service Request: CN-SYPTOM-001 - DESCRIPTION: SYMPTOM 001
NOTE ON THE SYMPTOM DESCRIPTION.

08/10/2016 08:18 AM SRV - SARAH VICKERS
Task: CNINSPECT001 - INSPECTION 001
NOTE TEST-NOTE AT A TASK LEVEL

03/09/2016 02:38 PM SRV - SARAH VICKERS

New Note

Successful update.

To add a note to a task on a service request:

- Select the service request and task from the drop-down lists

1000-2011-1 Notes

09/19/2011 14:55 MOLLYT - MARY SH

WAITING ON PART.

New Note

Service Requests: S-1 - STEERING & SUSPENSION

Tasks: 1507 - STEERING SHAFT U-JOINT

STEERING WHEEL VIBRATES

Save New Note

- Type the note
- Click the **Save New Note** button.

The note displays at the top of the list with the service request and task identifiers.

Actions	Notes	Comments
08/10/2016 08:21 AM SRV - SARAH VICKERS Service Request: CN-SYMPTOM-001 - DESCRIPTION: SYMPTOM 001 NOTE ON THE SYMPTOM DESCRIPTION.		
08/10/2016 08:18 AM SRV - SARAH VICKERS Task: CNINSPECT001 - INSPECTION 001 NOTE TEST-NOTE AT A TASK LEVEL		
03/09/2016 02:38 PM SRV - SARAH VICKERS		
New Note		
Successful update.		

To add a note to a task not on a service request:

1. Select the task from the drop-down list

New Note

Service Requests:

Tasks:

BRAKES SQUEEK

2. Enter the note
3. Click the **Save New Note** button.

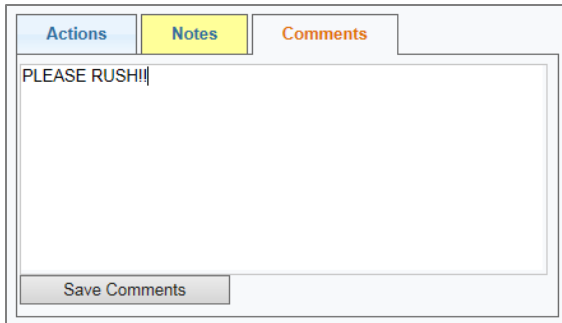
The note displays at the top of the note list with the task identifier and a 'Successful Update' message.

Actions	Notes	Comments
09/20/2011 13:48 MOLLYT - MARY SMITH Task: B - PM-B <u>BRAKES SQUEEK</u>		
09/20/2011 13:39 MOLLYT - MARY SMITH Service Request: S-1 - STEERING & SUSPENSION Task: 1507 - STEERING SHAFT U-JOINT STEERING WHEEL VIBRATES		
09/19/2011 15:12 MOLLYT - MARY SMITH HIGH PRIORITY		
09/19/2011 14:55 MOLLYT - MARY SMITH		
New Note		
Successful update.		

Add a Comment

To add a comment:

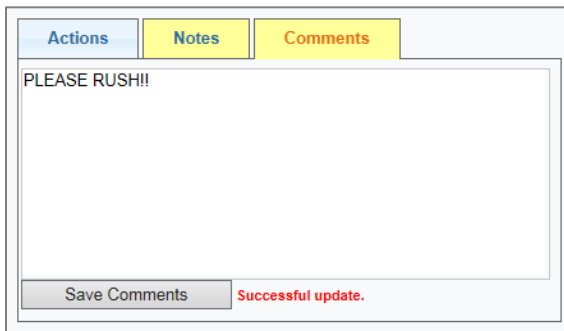
1. Click the **Comments** tab.



The screenshot shows a web interface with three tabs: 'Actions' (blue), 'Notes' (yellow), and 'Comments' (orange). The 'Comments' tab is selected. Below the tabs is a large text input area containing the text 'PLEASE RUSH!!'. At the bottom of the input area is a button labeled 'Save Comments'.

2. Type the comment.
3. Click **Save Comments**.
4. The comment is saved.

*The Comments tab is highlighted yellow and **Successful update** displays.*

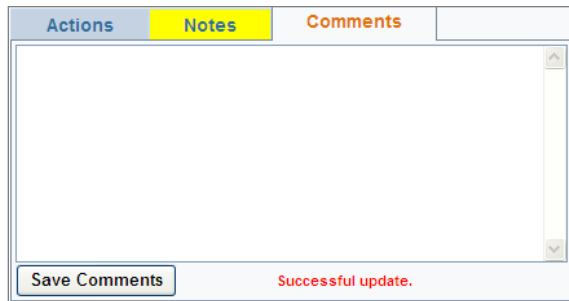


The screenshot shows the same web interface as the previous one, but now the 'Comments' tab is highlighted yellow. The text 'PLEASE RUSH!!' is still in the input area. The 'Save Comments' button is now disabled (grayed out), and a red message 'Successful update.' is displayed to its right.

To delete a comment:

1. Highlight and delete the comment
2. Click **Save Comments**.

The tab is not highlighted and the comment no longer displays.



The screenshot shows a web interface with three tabs: 'Actions' (blue), 'Notes' (yellow), and 'Comments' (orange). The 'Comments' tab is selected. Below the tabs is a large, empty text area with a vertical scrollbar on the right. At the bottom left of the interface is a button labeled 'Save Comments'. At the bottom right, there is a red text message that reads 'Successful update.'

4. Main Technician Portal Page (Posting)

The Main Technician Portal page display is based on the location settings for the technician's session location. The screenshot below shows an example of the technician's session location set for Posting. This section highlights only the differences on the Main Technician Portal Page for the posting environment as compared to real-time. Please refer to the section, [Main Technician Portal Page \(Real-time\)](#), for field and button descriptions of items not mentioned here.

The screenshot displays the Main Technician Portal Page in the Posting environment. At the top, there are navigation tabs for 'Home' and 'Technician', and an 'Admin Logout' link. The technician's name 'MOLLY TELLO (001)' and location 'LOC002 - EQUIPMENT REPAIR/PM' are shown. Below this, the 'Session Time Code' is set to 'RT - REGULAR TIME'. To the right, there are buttons for 'Indirect Time', 'Today's Timesheet', and 'Clock Out'. A section titled 'My Work Orders: 5' lists several work orders with details such as task count, location code, description, priority, delay, days open/left, and service status. At the bottom, there is a search bar with a 'Go' button.

Technician Portal Main Page (Posting)

Current Status Section

This screenshot is identical to the one above, but with a red rectangular box highlighting the 'Current Status Section'. This section includes the 'Session Time Code' field, the 'Indirect Time', 'Today's Timesheet', and 'Clock Out' buttons, and the 'My Work Orders: 5' list.

Because technicians post data to work orders after-the-fact in the posting environment, the current status section only contains information pertaining to the logged-in technician's session time code.

Indirect Time Button

The Indirect Time button takes you to the Choose an Indirect Task ID page as shown in the screenshot below.

1. Choose the location, enter a comment (that shows on the timesheet), and click the Indirect Task ID to change your time code.

After clicking an Indirect Task ID, the Post Indirect Labor pop-in displays.

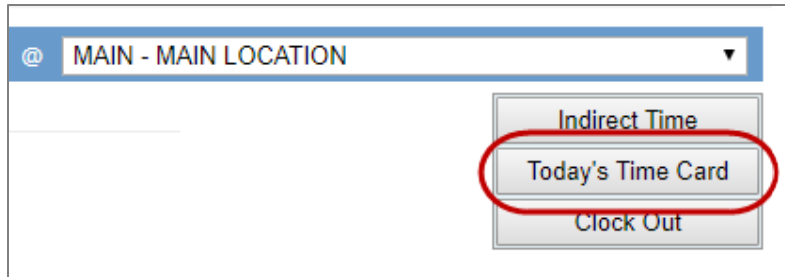
2. Complete the fields and click **Post Task** to post the indirect labor.



Depending on your settings, you may either select **Start/End Dates** and the hours are calculated upon selecting the start and end times or select a start **Date** and enter the **Hours**.

The Technician Main page displays.

3. To see the indirect labor posting, click the **Today's Timesheet** button.



The screenshot shows a web interface for a technician's portal. At the top, there is a dropdown menu with a blue header bar containing an '@' icon and the text 'MAIN - MAIN LOCATION'. Below this, there is a large empty rectangular area. To the right of this area, there is a vertical stack of three buttons: 'Indirect Time' (top), 'Today's Time Card' (middle, circled in red), and 'Clock Out' (bottom).

The indirect labor posting shows on the timesheet.

My Work Tab

The following are differences in the posting environment regarding the My Work Orders tab:

- The **My Work** tab is the only tab that shows in the posting environment because technicians cannot be currently jobbed onto tasks.
- **Start** buttons do not display in the posting environment.
- The **Work Order** button takes you to the **Work Order Details** page to post after-the-fact data. Please see the [Work Order Details Page](#) section below for detailed information about this page.

5. Main Technician Portal Page (Both: Real-Time and Posting)

When the technician's session location is configured for BOTH real-time and posting, the main Technician Portal page looks and acts the same as it does when configured for real-time. The main difference appears on the Work Order Main page as shown in the [Work Order Main Page \(Posting and Both: Real-time and Posting\)](#) section below.

6. New Work Orders

The initial New Work Order page is accessible from several different places in the Technician Portal.

For example, you can enter an equipment ID, license number, asset number, vehicle identification number, or rebuild part ID in the Search field on the Technician Portal Main Page and click **Go**.

The *Current and Pending Work* page displays with a New Work Order selection area displaying at the bottom of the page.

Task	Symptom	Entered When	Entered By	Priority
Pending Service Requests: 0				

Select the New PM WO or New Repair WO button depending on the type of work order you want to create for that equipment, linear asset, or rebuildable part.

 **Note:** For linear assets, to the right of the asset ID, there is an Attributes icon . Click this icon to see attributes and information for the liner asset.

 **Note:** The Equipment and Location lookup functions only show data allowed by location security.

Depending on the Job Type (Repair, PM or Part Rebuild), you are taken to the page for [New REPAIR Work Orders](#), [New PM Work Orders](#), or [New PART REBUILD Work](#)

[Orders](#). See the respective sections below for information on creating each type of work order.



Note: From the New Work Order page in the Technician Portal, you can also create a new work order by clicking the **Back** button on the bottom of the page. Clicking **Back** on the New Work Order page will take you to an initial New Work Order page like the one below.

New Work Order

Title

Job Type Repair PM Part Rebuild

Location 1 - OPS

Equipment ID ... 🔍

To create a new work order from this page, simply select the **Job Type** tab (Repair, PM, or Part Rebuild), and enter **Equipment ID** (Linear Asset ID, or Rebuildable Part ID and Part Suffix) and click **Continue**. This takes you to the New Work Order pages as outlined in the following sections.

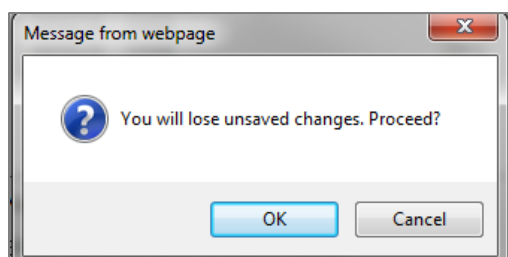
New Repair Work Orders

To create a new repair work order, enter the **Equipment ID** or **Linear Asset ID** and select the **New Repair WO** button (or the **Repair** tab and click **Continue**).



The New Repair Work Order page displays with the selected Job Type, Location, and Equipment or Linear ID as shown in the following sections.

- ✓ If you selected the incorrect Job Type, click the **Back** button and click **OK** on the dialog to go back to the initial New Work Order page.




The initial New Work Order page.

Equipment

1. Enter an **Equipment ID** and click the **New Repair WO** (or **Continue**) button as discussed above.

You will see a New Work Order page similar to the below.

New Work Order 1-2016-24

Enterprise Portal Equipment Screen

Title

SRV TEST WQ

Job Type

REPAIR

Location

1 - OPS

Equipment ID

SRV-CAR1

BLAZIN FIRE

2006 CHEVROLET BLAZER, METERS: 1-0 NONE; 2-0 NONE

Work Details

Messages

OTHER OPEN WORK ORDERS

WORK ORDER NUMBER	TYPE	STATUS	SCHEDULED	REASON	SERVICE
1-2016-22	REPAIR	OPEN		A	
1-2016-16	REPAIR	OPEN	06/01/2016 07:00	J	
1-2016-17	REPAIR	OPEN	06/01/2016 10:30	AB02	
1-2015-5	REPAIR	OPEN		B	

UNIT IS UNDER WARRANTY - EXPIRES 01/01/2017

Repair reason ID

J

OTHER

Work Class

Service Status

HFM

HOLD FOR MAINTENANCE

Date and Time In

06/24/2016 11:40 AM

Date and Time Due

06/26/2016 11:40 AM

Repair Site

01

FACILITY

Vendor

Technician

Estimated Appointment Hours

Contact Name

Phone

Email Address

Priority ID

Q0

QA'S PRIORITY CODE

Account ID

1000.111101.00001.000.00000

TEST

Warranty Work

UNKNOWN

Notes

New Service Request

Standard Job

Symptom

Fail / Cause Code

WAC

Correction Performed

Existing Service Requests for this Asset

Retrieve service requests/defects that overlap with the work order position

Assign	Task	Symptom	Entered When	Entered By	Priority

Back

Cancel

Save



The **Meter Validation** drop-down list is limited based on the permissions setting on the User Groups, Special Rights tab and may include: Update the equipment record, Update transaction only, and Update transaction only on fail.

- Update transaction only on fail displays in the drop-down menu when both boxes for Accept meter for transaction purposes only, and Update latest meter reading for unit are checked.
- **Update transaction only on fail** sets the validation to NO EQ UPD if an error occurs while processing. This will not update the meter.

 **Estimated Appointment Hours** (depends on settings) allows **Technicians** to create an appointment for the duration based on the **Date and Time In**.

 The **Priority ID** choice-list is based off of Asset Category (if one exists).

 Selecting a **Standard Job** creates a service request for the standard job's **Complaint**, fills in the **Cause** and **Correction** fields, and assigns the service request to the work order.

 If a work order is created from a service request, the contact information will be auto-populated from the service request, and can be edited as needed. All operators that support the location listed on the work order are listed in the Contact choice-list.

2. Complete the fields.
3. If applicable, select any pending service requests to include on the work order. The service requests are listed by priority rank.

If your organization has Enterprise Portal, a link displays on the top of the page.

4. Click the **Save** button to create a new work order.

Depending on your configuration, you will be directed to the Work Order History page, the Work Order Main page or the Work Order Details page.

5. To see all work orders associated with the equipment unit, click **Show All History** on the Work Order History page.
6. Click **Continue** to go to the Work Order Main page or the Work Order Details page.

Linear Assets

After you enter a **Linear Asset ID** and click the **New Repair WO** (or **Continue**) button as discussed above, you will see a New Work Order page similar to the below.

Creating a linear work order generally follows the same process as any other asset, however the beginning and ending positions of the work must be specified using the Work Position dialog. This can be accomplished by entering the from marker, to marker,

and offsets directly or using the linear slider. The linear slider shows the length of an asset and all markers found along it with the marker ID and description below. As long as you have maps set up, the map displays below the Work Position area. When you move the points on the slider, the map below shows the current length of the asset you have selected.

Work Position

From Marker

002017 MID 1

...

002017 MID 1

Offset

17.0

To Marker

002017 END

...

002017 END

Offset

0.0

Asset Length 0.30 mi

Selected Length 0.22 mi

SRV-002017 BEG

SRV-002017 MID 1

SRV-002017 MID 2

SRV-002017 END

Attributes

Choose...

No attributes selected

Effective Date

02/22/2018

From SRV-002017 MID 1 +17 (417 feet)

To SRV-002017 END +0 (1,800 feet)

Layers

Base maps

Layers

☒ Asset
 ☒ Asset
 ☒ Reference markers
 ☐ Reference marker labels
 ☒ From and to points

Search

2

100 m

500 ft

The work position indicators are displayed as a green triangle and red square for the beginning and ending positions. Initially, both circles are displayed at the beginning of a linear asset on the left. To change the work position click and drag the circle to the desired position while holding the left mouse button down. Clicking on a marker moves the position circles to that marker. Fine tune adjustments to the work position can be made by entering the offsets directly or clicking on the position indicator and using the arrow keys to move along the linear asset in small increments.

Your screen may appear slightly different based on settings.

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 **Estimated Appointment Hours** (depends on settings) allow the **Technician** to create an appointment for the duration based on the **Date and Time Assigned**.

 The **Priority ID** choice-list is based off of Asset Category (if one exists).

1. If applicable, select any pending service requests to include on the work order. The service requests are listed by priority rank.

 Note: Check the **Retrieve service requests/defects that overlap with the work order position** box to see other pending service requests for the entire range of the linear asset.

2. Complete the Segment/Marker/Offset fields, Work Class, and other fields.

 Note: Offsets will default based on the attached service request. You can manually change these if needed.

3. Click **Save** to create a new work order.

*If your organization has **Enterprise Portal**, a link displays on the top of the page.*

Depending on your configuration, you may be taken to the Work Order History page, the Work Order Main page, or the Work Order Details page. To see all work orders associated with the equipment unit, click the **Show All** button on the Work Order History page. Clicking the **Continue** button takes you to the Work Order Main or the Work Order Details page.

New PM Work Orders

 The option, **Update current meter reading on equipment when update meter on a finished work order** is located on the Shop Activity – Setup – Options screen, Options tab. When the option is on, the system updates the PM meter reading on finished repair and PM work orders with multiple PM services. The system updates across all PMs on a work order for both Repair and PM work order types when the option is on. However, if it is a Class PM, then the system only updates the current slotted class PM on Equipment Main and all individual PMs should be updated. When the option is off, the system does not update the meter if the meter is changing when in work order finished status.

1. To create a New PM work order, enter the **Equipment ID** or **Linear Asset ID**
2. Click the **New PM WO** button (or the **PM** tab) or click **Continue**.



The screenshot shows a software interface with a search bar at the top containing 'Equipment INTE235' and a 'Search' button. Below the search bar are three buttons: 'Back', 'Repair History', and 'New Service Request'. To the right of these buttons are two more buttons: 'New PM WO' and 'New Repair WO'. The 'New PM WO' button is circled in red, and a red arrow points to it from the right.

The New PM Work Order page displays with the selected Job Type, Location, and Equipment or Linear ID as shown in the following sections.

Equipment

After entering an **Equipment ID** and clicking the **New PM WO** (or **Continue**) button as discussed above, you will see a New Work Order page similar to the below.

Based on location level settings, the user has the ability to select multiple PM services to add to the work order.

WORK ORDER NUMBER	TYPE	STATUS	SCHEDULED	REASON	SERVICE
1-2016-24	REPAIR	OPEN		A	
1-2016-22	REPAIR	OPEN		A	
1-2016-16	REPAIR	OPEN	06/01/2016 07:00	J	
1-2016-17	REPAIR	OPEN	06/01/2016 10:30	AB02	
1-2015-5	REPAIR	OPEN		B	

New Service Request

Standard Job

...

Symptom

...

Fail / Cause Code

...

WAC

...

Correction Performed

Existing Service Requests for this Asset

☐ Retrieve service requests/defects that overlap with the work order position

Assign	Task	Symptom	Entered When	Entered By	Priority

Back

Cancel

Save

Sample New PM Work Order Page for Equipment

Complete the fields and click the **Save** button to create a new PM work order for equipment.

Linear Assets

After entering a **Linear Asset ID** and clicking the **New PM WO** (or **Continue**) button as discussed above, you will see a New Work Order page similar to the below.

New Work Order 1-2016-27
Enterprise Portal Equipment Screen

Title
Job Type PM
Location 1 - OPS
Equipment ID INTE235 INTERLOCKING E235 AVONDALE THROAT-PM
INTERLOCKING E235 AVONDALE THROAT-PM , INTERLOCKING

Work Position

From Marker
To Marker
Offset
Offset

Asset Length 36.0 feet
Selected Length 0.0 feet

Work Details

☐ Messages

OTHER OPEN WORK ORDERS

WORK ORDER NUMBER	TYPE	STATUS	SCHEDULED	REASON	SERVICE
TC3170-2011-1409	PM	PENDING			TC2-PM-9
TC3170-2011-1410	PM	PENDING			TC2-PM-7
TC3170-2011-1411	PM	PENDING			TC2-PM6SW180

UNIT IS 1714 DAYS LATE FOR PM SERVICE TC2-PM-9 - DUE DATE 10/15/2011
UNIT IS 1714 DAYS LATE FOR PM SERVICE TC2-PM-7 - DUE DATE 10/15/2011
UNIT IS 1622 DAYS LATE FOR PM SERVICE TC2-TEST2ALL - DUE DATE 01/15/2012
UNIT IS 1714 DAYS LATE FOR PM SERVICE TC2-PM6SW180 - DUE DATE 10/15/2011

Repair reason ID
Work Class

Services and Inspections Due: 4

Add to Work Order	Service / Inspection due	Reason	Date due	Days Until Due	Days late	Meter 1 until due	Meter 2 until due
☐	TC2-PM-7 - TRAIN STOP INSPECTION	DATE	10/15/2011	LATE	1714	0	0
☐	TC2-PM-9 - SNOW MELTER INSPECTION	DATE	10/15/2011	LATE	1714	0	0
☒	TC2-PM6SW180 - 180 DAY SWITCH MACHINE TEST AND INSPECTION	DATE	10/15/2011	LATE	1714	0	0
☐	TC2-TEST2ALL - TEST 2 FOR SWITCH MACHINES - SIGNALS - TRAIN STOPS	DATE	01/15/2012	LATE	1622	0	0

Service Status
Date and Time Assigned 06/24/2016 12:00 PM
Date and Time Due 06/25/2016 12:00 PM
Vendor
Technician
Estimated Appointment Hours
Contact Name
Phone
Email Address
Priority ID 3 ROUTINE
Account ID 1000.531395.18980.000.00000 AUTOMATIC TRAIN CONTROL
Warranty Work NO
Notes

Existing Service Requests for this Asset
☐ Retrieve service requests/defects that overlap with the work order position

Assign	Task	Symptom	Entered When	Entered By	Priority

Back
Cancel
Save

Sample Linear PM New Work Order

Complete the fields and click **Save** to create a new PM work order for linear assets.

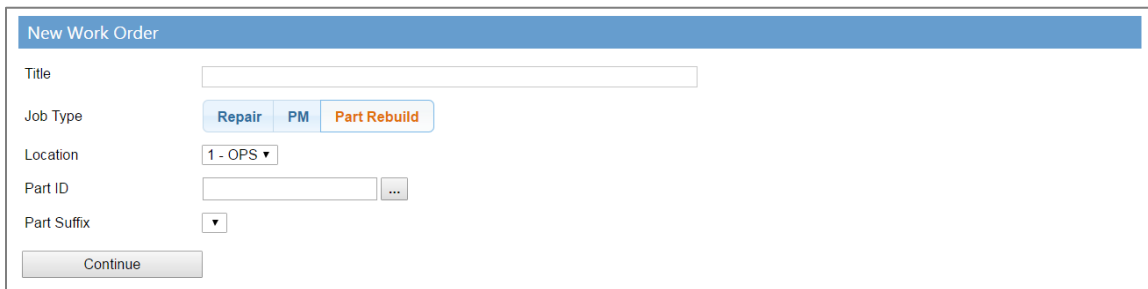
New Part Rebuild Work Orders

To create a New Work Order for Part Rebuilds, do one of the following:

1. Enter a **Part Rebuild ID** in the **Search** field and click **Go** on the Technician Portal Main page.

A search bar with a blue header. The text 'Search' is on the left. The input field contains 'cnpart100'. To the right of the input field is a small grey button with three dots. Further right is a button labeled 'Go', which is circled in red with a red arrow pointing to it from the right.

2. On the initial New Work Order page, enter a **Title**, select **Part Rebuild** tab for **Job Type**, enter the rebuildable **Part ID** and **Part Suffix**, and click the Continue button.

A form titled 'New Work Order' with a blue header. It contains several fields: 'Title' with a text input; 'Job Type' with three buttons: 'Repair' (blue), 'PM' (blue), and 'Part Rebuild' (orange); 'Location' with a dropdown menu showing '1 - OPS'; 'Part ID' with a text input and a small grey button with three dots; 'Part Suffix' with a dropdown menu; and a 'Continue' button at the bottom.

3. For Part Rebuilds to work correctly, several criteria must met:
 - i. Primary records for all suffixes related to rebuilds (i.e., -1 and -98) must be setup in the system
 - ii. The part classification assigned to the part must have one of the repairable/rebuildable flags checked
 - iii. If part status tracking is active, the part suffix must be the suffix for rebuilt parts.

The New Work Order Page for Part Rebuilds displays as shown below.

Sample part rebuild New Work Order Page

 If your organization has **Enterprise Portal**, a link displays on the top of the page.

 The only tasks available for a **Part Rebuild** are **Repair** tasks.

4. Complete the fields and click **Save** to create a new work order.

 **Note:** **Priority ID** is a required field. The priority ID choice-list is based off of asset category (if one exists.).

 If a work order is created from a service request, the contact information will be auto-populated from the service request, and can be edited as needed. All operators that support the location listed on the work order are listed in the Contact choice-list.

You are taken to the Work Order Main page or the Work Order Details page where you may add tasks, serial numbers, etc.

5. Click **Cancel** to cancel the creation of the new work order or click **Back** to go to the page from which you originated.

7. Work Order History Page

Depending on your settings, the Work Order History page displays upon clicking the Work Order Number button on the Work Order Main page. Clicking the Equipment History button in the Actions section of the Work Order Main page or the Work Order Details page also takes you to the work order Work Order History page. Likewise, this page displays after searching for equipment and selecting an inactive asset from the list of equipment.

Work Order History

Asset ID

Asset Number

License Number

Operator Name

Station Location

Repair Location

Current Filter

Months of History

Count of Work Orders

All

Task ID

Show Work Orders with no postings

Apply Filter

Reset Filter

History for all months

Work Order ID	WO Date	WO Closed Date	Task ID	Life Meter 1	Meter 1 Since Last PM
1-2017-23	02/22/2017 10:44		AF - PM SERVICE A	20100	
1-2017-23	02/22/2017 10:44			20100	
1-2017-23	02/22/2017 10:44			20100	
1-2017-23	02/22/2017 10:44		Y - PM SERVICE Y	20100	

Back

Show All History

Printer Friendly

This page lists the work order history for the piece of equipment.

To view work order history:

- Do any of the following:
 - Set the range of months to display the history: Enter a number in the **Months of History to Display** field (0=All) and click the **Enter** key or **Apply Filter** button.
 - Set the number of Work Orders to display the history: Enter a number in the **Number of Work Orders to Display** field (0=All) and click the **Enter** key or **Apply Filter** button.
 - Filter the task: Enter a Task Code in the **Task ID** field and click the **Apply Filter** button.
 - Display a list of all the work order history for that piece of equipment: Click the **Show All History** button.



Note: For linear assets, to the right of the asset ID there is an Attributes icon . Click this icon to see attributes and information for the liner asset.

After entering the data for display, a populated Equipment History page appears.

2. If desired, check the **Show Work Orders with no postings** option to display equipment units that do not have non-zero postings in the list. This option defaults as checked if the Shop Activity setting for **Show work orders in equipment history with no postings** is checked.
3. Click on the Work Order ID button to go to the Work Order Details page. See the [Work Order Details Page](#) section below for more information regarding this page.
4. Depending on settings, you may click the **Printer Friendly** button to obtain the Equipment History Report. This button is linked to the report that was set up during configuration.



You need to have access and permission to Reports for the **Printer Friendly** button to work properly.

8. Work Order Main Page (Real-Time)

This is the central page for viewing detailed information about a particular work order. It is accessible from several places in the Shop Activity module.

Work Order Main

Asset ID	SRV-CAR1: 7897894569 2006 CHEVROLET BLAZER RED BLAZIN FIRE			Tech ID	Tech Name	Task
Asset Number	SRV01	Station Location	ABA - 2 ASSET CENTRAL ADMINISTRATION	SRV	SARAH VICKERS	CNINSPECT001
License Number	PRINCESS1	Repair Location	ABA - 2 ASSET CENTRAL ADMINISTRATION			
Work Order ID	1-2015-5	Job Status	OPEN			
Title		Job Type	REPAIR			
Unit In	09/29/2015 09:48 AM	Due	10/01/2015 09:48 AM			
Work Completion	0 / 6 (0.00%)	Hours Completion	2.64 / 43.79 (6.03%)			
Projected Completion Date	INSUFFICIENT DATA					

Tasks: 5

	Task ID	WAC	Remaining Hours
	A - PM SERVICE A		13.79
	AC1-PM - BASIC PM TASKS		-0.07
	CNINSPECT001 - INSPECTION 001		5.00
	CNTASK005 - CN REPAIR		

New Task

Start Task

Service Requests / Defects: 2

	Code - Description
Select	Symptom: CN-SYMP-001 - DESCRIPTION: SYMPTOM 001
+ Select	Symptom: QA-SYMP-CRACK - QA SYMPTOM FOR CRACK Task: 001 - ELECTRICAL SYSTEM

Add / Manage

Actions

Main Page	Start Delay	View/Edit Detail
Finish Work Order	Part Actions	
Equipment History	Test Results	Related Files
Messages	Print Work Order	Component Warranty
Commercial Work	Postings	Relationships

Notes

08/10/2016 08:21 AM SRV - SARAH VICKERS
Service Request: CN-SYMP-001 - DESCRIPTION: SYMPTOM 001
NOTE ON THE SYMPTOM DESCRIPTION.

08/10/2016 08:18 AM SRV - SARAH VICKERS
Task: CNINSPECT001 - INSPECTION 001
NOTE TEST-NOTE AT A TASK LEVEL

03/09/2016 02:38 PM SRV - SARAH VICKERS
Service Request: CN-SYMP-001 - DESCRIPTION: SYMPTOM 001
New Note

Title and Comments

Back

Assignments

Note: For linear assets, to the right of the asset ID, there is an Attributes icon . Click this icon to see attributes and information for the liner asset.

The upper left portion of the Work Order Main page is the header section which displays general information regarding the work order and related equipment ID.

Work Order Main

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
Title		Job Type	REPAIR
Unit In	09/29/2015 09:48 AM	Due	10/01/2015 09:48 AM
Work Completion	0 / 6 (0.00%)	Hours Completion	2.64 / 43.79 (6.03%)
Projected Completion Date	INSUFFICIENT DATA		

Depending on your configuration, the Work Order Main page display may slightly differ from the sample screenshot. For example, in the Work Order Main page header below, the Asset ID is a link to the FleetFocus Equipment screen and the Work Order ID links to the Work Order Center screen. However, for these links to work properly, you must have access to these screens and Enterprise Portal must be installed.

The fields displayed in the Work Order Main header section also depend on your configuration. For example, the header below shows Hours Completed and Tasks Completed. Hours Completed displays as hours logged against all tasks on the work order over the number of estimated hours to complete all tasks on the work order. The Hours Completed percentage also displays. Tasks Completed displays as the number of tasks completed over the number of tasks on the work order. The Tasks Completed percentage also displays.



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

Configuration Compliance information will display if your system is licensed for Asset Configuration Management.

Please refer to the *Shop Activity Technician Administrator Guide* for additional information about configuring the Header Profile detail.

The box to the right of the header information lists the technicians currently working on tasks.

Tech ID	Tech Name	Task
1000-11	MARY SMITH	BRK-004

Depending on your work order location setting configuration, the main Technician page and the Work Order Main page differ slightly whether your organization requires service requests for tasks or not. The main differences are the Start button displays on the Main Technician page when Service Requests are *NOT* required for tasks.

Select SR Task: KA-REPA - REPAIR
Description: PRE: STEAM ENGINE/TRANS/REAR WHEEL/RADIATOR/REAR STEP WELLS

Start KA-REPA - REPAIR WAC:

Tasks not on Service Requests

Start LMBRAKES - BRAKE J WAC:

Add / Manage SRs New Task Start Task

Set to not REQUIRE service requests for tasks

Select SR Task: KA-REPA - REPAIR
Description: PRE: STEAM ENGINE/TRANS/REAR WHEEL/RADIATOR/REAR STEP WELLS

Parts

Start KA-REPA - REPAIR WAC:

Tasks not on Service Requests

Parts

LMBRAKES - BRAKE INSPECTION 57 WAC:

Add / Manage SRs

Set to REQUIRE service requests for tasks

On the Work Order Main page, the **Start**, **New Task**, and **Start Task** buttons display when service requests are NOT required for tasks. The aforementioned buttons are hidden when service requests ARE required for tasks (as shown in the screenshots below). Also, the Service Requests area will fill the entire Task area when no unrelated tasks exist.

Unit In 09/29/2015 09:48 AM Due 10/01/2015 09:48 AM
Work Completion 0 / 6 (0.00%) Hours Completion 2.64 / 43.79 (6.03%)
Projected Completion Date INSUFFICIENT DATA

Tasks: 5

Task ID	WAC	Remaining Hours
A - PM SERVICE A		13.79
AC1-PM - BASIC PM TASKS		-0.07
CNINSPECT001 - INSPECTION 001		5.00
CNTASK005 - CN REPAIR		

New Task Start Task

Service Requests / Defects: 2

Code - Description
Symptom: CN-SYMTOM-001 - DESCRIPTION: SYMPTOM 001
Symptom: QA-SYMP-CRACK - QA SYMPTOM FOR CRACK Task: 001 - ELECTRICAL SYSTEM

Add / Manage

Back Assignments

Actions

Main Page	Start Delay	View/Edit Detail
Finish Work Order	Part Actions	
Equipment History	Test Results	Related Files
Messages	Print Work Order	Component Warranty
Commercial Work	Postings	Relationships

Notes

08/10/2016 08:21 AM SRV - SARAH VICKERS
Service Request: CN-SYMTOM-001 - DESCRIPTION: SYMPTOM 001
NOTE ON THE SYMPTOM DESCRIPTION.

08/10/2016 08:18 AM SRV - SARAH VICKERS
Task: CNINSPECT001 - INSPECTION 001
NOTE TEST-NOTE AT A TASK LEVEL

03/09/2016 02:38 PM SRV - SARAH VICKERS
Service Request: CN-SYMTOM-001 - DESCRIPTION: SYMPTOM 001

New Note

Title and Comments

Work Order Main

Equipment ID	CNCAR010 CNCAR010 2000 FORD F350 HEAVY DUTY TRUCK FOR CONSTRUCTION SITE			Tech ID	Tech Name	Task
Asset Number	7537253	Station Location		License Number	CP281975	MOLLYT MOLLY A
Work Order ID	CNLOC2-2008-7	Job Status	OPEN			
Job Type	PM	Assigned Technician				
Date and Time Opened	11/14/2008 09:07	Date and Time Due	11/16/2008 09:07			
Repair Location	CNLOC2 - WORK ORDER LOCATION	Service Status	ACTIVE - ACTIVE STATUS			

Tasks: 8

Task ID	Task Description	WAC
A	PM-A	
CNINSPECT005	USE TO TEST 12 CHARACTER INSPECTIONS	
CNINSPECT010	USE TO TEST 12 CHARACTER INSPECTIONS	

Service Requests / Defects: 1

Code	Description
Symptom: 1-RA-SYMP	

Set to REQUIRE service requests for tasks

Actions

Main Page Start Delay View/Edit Detail

Finish Work Order Part Actions

Equipment History Test Results Related Files

Messages Print Work Order Component Warranty

Commercial Work

Notes

New Note

Tasks Section

Tasks: 5

Task ID	WAC	Remaining Hours
A - PM SERVICE A		13.79
AC1-PM - BASIC PM TASKS		-0.07
CNINSPECT001 - INSPECTION 001		5.00
CNTASK005 - CN REPAIR		

New Task Start Task

The Tasks section lists all tasks already assigned to this work order. A clipboard icon in the left column indicates the task has been assigned to you. Use the scroll bar on the right of the Tasks section to see all the tasks if there are many. When the task on the work order does not have a Work Accomplished Code (WAC), the task is highlighted. Upon entering a Final Status WAC (on the Work Order Task page), the code is displayed in the WAC column and the row is no longer highlighted.

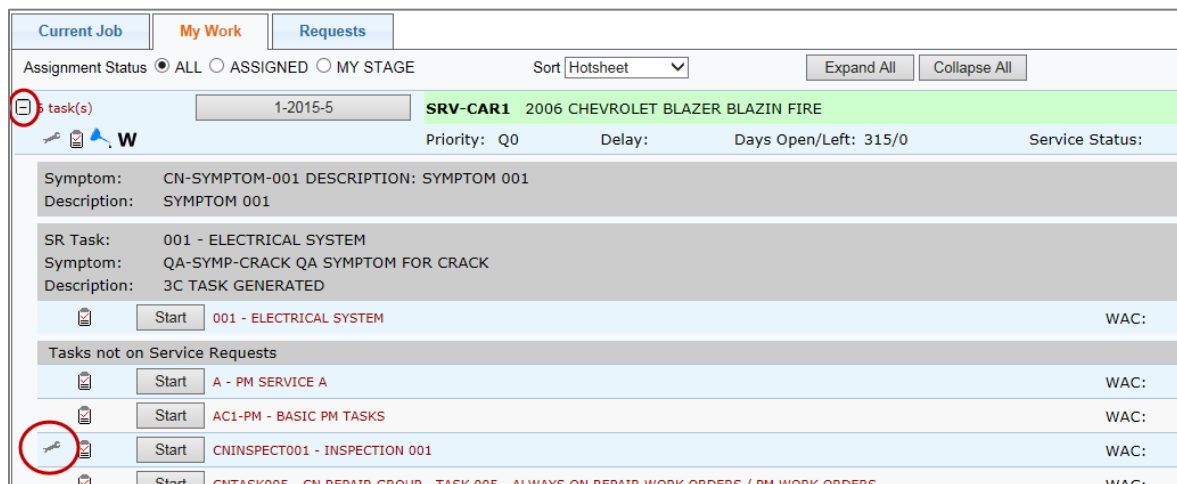
Task ID Link

Click on the red task ID to go to the Work Order Task, Update Task Fields, and Updated Work Order Fields page. You may enter information about the task, including the WAC code and task procedure information (if applicable), on this page. See the [Work Order Task Page](#) section for information about this page.

Start Button

To start the task, click **Start**. You are returned to the Main Technician page and a wrench in the left column of the Current Job tab indicates the task you are working on for the particular work order.

If you switch to the **My Work** tab on the main Technician page, click the **+** on the work order to see the specific task you are working on within the work order or service request.



 When jobbing onto a task with incomplete information, the user is redirected to the Task Detail page. Please refer to the [Serialized Parts Workflow](#) section below for more information about dealing with serialized parts.

 Employees may be restricted to only being able to job onto tasks to which they have been assigned.

New Task Button

Back in the Tasks section of the Work Order Main page, you may also add new tasks by clicking **New Task**. Clicking New Task takes you to the New Task Selector page where you may assign a new task to the work order. See the [New Task Selector Page](#) section below for a detailed overview of the page.

Or, you may choose to key in or scan the exact task ID in the field and click **Start Task**.

Start Task Button

1. Clicking **Start Task** begins the selected task and takes you back to the [Technician Portal Main Page](#). However, if a WAC is required for the specified task, you are directed to the Work Order Task page to enter the WAC (as shown in the screenshot below).

Work Order Task			
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
Title		Job Type	REPAIR
Unit In	09/29/2015 09:48 AM	Due	10/01/2015 09:48 AM
Work Completion	0 / 7 (0.00%)	Hours Completion	34.79 / 43.79 (79.45%)
Projected Completion Date	INSUFFICIENT DATA		
Task	A - PM SERVICE A		

Value is required for Work accomplished code - PR-ERR: 3

Stopping Task: A - PM SERVICE A

WAC ...

☐ Final Status

Work Class ...

Warranty Work ...

Repair Reason ...

Account ID ... TEST

Priority ID ... QA'S PRIORITY CODE

Estimated Hours

Equipment Warranty ☐

Warranty Vendor ID ...

Location ...

No Parts Needed ☐

Date and time completed

Comment

Procedure Information

Update Work Order Fields

Notes

Add a new note

Back
Stop Task

2. Complete the fields and click **Start Work** to begin the task.

Serialized Parts Workflow

Web Modules prompts the technician for serial numbers whenever there is incomplete information and the technician jobs onto and off of a task for which serialized parts have been requested. If a part is issued with incomplete information, you will be required to complete the information before finishing or closing the work order depending on your settings.

The screenshot below represents the intermediate page that displays to prompt the technician for serial numbers where there was incomplete information and the technician has jobbed onto a task in which serialized parts have been requested.

The screenshot displays a web application interface for managing work orders. At the top, there are navigation tabs for 'Home' and 'Tech', and a user profile section for 'Admin' with a 'Logout' link. The main form is titled 'Work Order Task' and contains several input fields and buttons. The 'Equipment ID' field is populated with '0000182: KATRD00009 2005 GE 7GA73A3 TRACTION MTR'. Below this, there are fields for 'Asset Number', 'Station Location', and 'License Number'. The 'Task' field is populated with 'LM-TSKBRK: LM TASK BRAKE SERVICE'. The 'Work Order ID' is 'JH-HUB-2007-21', and the 'Job Status' is 'OPEN'. The 'Date and Time Opened' is '06/19/2007 14:23', and the 'Date and Time Due' is '06/26/2007 14:23'. The 'Repair Location' is 'KAOPS - KA OPERATIONS', and the 'Service Status' is empty. Below these fields, there is a 'Labor Capture Fields' section with a 'WAC' field set to '03' and a button 'EXCHANGE - NEW'. The 'Position' field is empty, and the 'Work Order Time Code' is 'ST1' with a button 'DAY SHIFT'. At the bottom, there is a 'Serialized Part Requests' section with a 'Part ID' field set to 'CNSERIALPART032 -0 SERIALIZED PART FOR USE ON PLANES TRAINS AND AUTOMOBILES'. The 'Position' field is empty, and the 'Date Requested' is '10/08/2007 12:28'. There are 'Comments' and 'Installed Serial No.' fields, both with empty input boxes and buttons. The 'Removed Serial No.' field is also empty with an input box and a button. At the bottom of the form, there are 'Back' and 'Save' buttons.

Conditions for Completion of Missing Task Information

If there is missing task information user will be directed to the Task Detail page to complete the missing information before jobbing onto the task.

Technicians are prompted for serial numbers for serialized parts based on the following conditions:

- The part request is for the task that the technician is charging time to, AND one of the following mutually exclusive conditions is met:
 - There is no related record in PTD_MAIN for the request (no part has been issued).
- OR
- **Serialized Parts** – There is a related record in PTD_MAIN, but it was an INSTALL-only issue. Therefore, the request is missing its removed serial number. Web Modules stores the removed serial number (once provided by the technician), and automatically creates a removal-only issue to complete the part transaction.

Choice-lists

Upon jobbing onto a task with a request for a serialized part, the technician is provided with a choice-list. Users can manually enter serial numbers, or choose from a list. The lists of serial numbers for install and removal is based on the same lists used by the system. Users cannot modify an installed serial number if the request has already ISSUED the installed part (install-only issue, no removal yet).

Service Request/Defects Section

Service Requests / Defects: 2			
Code - Description			
Select	Symptom: CN-SYMP-TOM-001 - DESCRIPTION: SYMPTOM 001		
Select	Symptom: QA-SYMP-CRACK - QA SYMPTOM FOR CRACK Task: 001 - ELECTRICAL SYSTEM		
Task	WAC	Remaining Hours	
001 - ELECTRICAL SYSTEM		8.43	
Add / Manage			

The Service Request/Defects section lists all Service Requests assigned to the work order. If the Service Request is highlighted, it indicates that the task on the service request does not have a Work Accomplished Code (WAC). After you enter a final status WAC, the code is displayed in the WAC column and the row is no longer highlighted.

1. To see all tasks on the service requests, click the +.

The clipboard  to the left of a task indicates that the task is assigned to you.

2. Click the red link in the Code-Description column at the service request level to open the Service Request/Defect page. See the [Service Request/Defect Page](#) section below for more information about this page.
3. Click **Select** at the Service Request level to go to the Add Work Order Tasks Pop-in. See the [Add Tasks to Service Requests](#) section below for more information about this page.
4. Click the red link at the Task Level to go to the Work Order Task page. See the [Work Order Task Page](#) section below for more information about this page.
5. Click **Start** at the task level to begin working on the task.
6. To create a new Service Request, to assign an unassigned service request, or to unassign an assigned service request, click the **Add/Manage** button. A highlighted Add/Manage button indicates that there are unassigned service requests pending.

When you click the Add/Manage button, you are taken to the Work Order Service Requests page. Depending on your organization's setup, technicians may not be able to create new Service Requests. See the [Work Order Service Requests Page](#) section below for more information about this page. If your organization is using service requests to track 3C data (complaint, cause, correction), technicians add service requests for all repairs performed.

Actions Section

Actions		
Main Page	Start Delay	View/Edit Detail
Finish Work Order	Part Actions	
Equipment History	Test Results	Related Files
Messages	Print Work Order	Component Warranty
Commercial Work	Postings	Relationships

The buttons displayed in the Actions section of the Work Order Main page are some of the same buttons that appear on the main Technician page including the buttons listed below, however, the order of the buttons is different. The buttons displayed in the Actions section vary depending upon your configuration and the type of work order you are viewing, i.e., regular asset work order or part rebuild. The additional buttons that display on the Work Order Main page may be as follows:

Main Page

Takes you back to the [Main Technician Portal Page \(Real-Time\)](#).

Postings

This button takes you to the [Work Order Details Page](#).

Relationships

This button opens the Edit Work Order Relationships pop-in to assign parents or children, or edit relationships.

1-2015-5 - Edit Work Order Relationships

Assign Parent
Assign Children

Parent

Remove	Work Order ID	Depends	Asset	WO Status

Children

Remove	Child Work Order ID	Dependent	Asset	WO Status
☐				

Close
Save

Notes/Comments Section

The section displayed in the bottom-right portion of the page is based on your configuration.

The screenshot shows a web interface for entering notes and comments. It is divided into two main sections. The top section, titled "Notes", contains a list of three entries. Each entry shows a timestamp, a user ID, and a description. The first entry is dated 08/10/2016 08:21 AM, by SRV - SARAH VICKERS, with the description "Service Request: CN-SYMPOM-001 - DESCRIPTION: SYMPTOM 001" and a note "NOTE ON THE SYMPTOM DESCRIPTION.". The second entry is dated 08/10/2016 08:18 AM, by SRV - SARAH VICKERS, with the description "Task: CNINSPECT001 - INSPECTION 001" and a note "NOTE TEST-NOTE AT A TASK LEVEL". The third entry is dated 03/09/2016 02:38 PM, by SRV - SARAH VICKERS, with the description "Service Request: CN SYMPTOM 001 - DESCRIPTION: SYMPTOM 001". Below the list is a "New Note" button. The bottom section, titled "Title and Comments", has a text input field for the title, a larger text area for comments containing the text "PLEASE RUSH!!", and a "Save" button at the bottom.

Notes	
08/10/2016 08:21 AM	SRV - SARAH VICKERS
Service Request: CN-SYMPOM-001 - DESCRIPTION: SYMPTOM 001	
NOTE ON THE SYMPTOM DESCRIPTION.	
08/10/2016 08:18 AM	SRV - SARAH VICKERS
Task: CNINSPECT001 - INSPECTION 001	
NOTE TEST-NOTE AT A TASK LEVEL	
03/09/2016 02:38 PM	SRV - SARAH VICKERS
Service Request: CN SYMPTOM 001 - DESCRIPTION: SYMPTOM 001	

New Note

Title and Comments

PLEASE RUSH!!

Save

Comments are a single field where text may be entered and updated or deleted at a later time. Notes are stamped with the user ID that entered them, and the date/time they were entered. Once entered, they may not be edited at a later date.

Notes and comments are entered the same way they are entered on the Technician Portal Main page. Please refer to the [Comments/Notes Tab](#) section above for more details.

9. Work Order Main Page (Posting and BOTH Real-Time and Posting)

A Postings button shows in the Work Order Main page's Action section when the technician's session location is configured for Posting or BOTH (Real-time and Posting). Clicking the Postings button takes you to the Work Order Details page. See the [Work Order Details Page](#) section for more information about this page.

 When the Work Order Location is setup for both (real-time and posting), clicking the **Work Order** button on the Technician Main page defaults to the Work Order Main page where the **Postings** button may be selected to go to the Work Order Details page.

 **Note:** For linear assets, to the right of the asset ID, there is an Attributes icon . Click this icon to see attributes and information for the liner asset.

Work Order Main

Asset ID	RACAR11: RASNCAR11 2012 HONDA CIVIC GRAY MOTOR POOL SEDAN 			Tech ID	Tech Name	Task
License Number	WA-0011	Repair Location	RALOC-1 - RICHARD'S TEST LOCATION #1	MOLLY-EMP	MOLLY	002
Work Order ID	CNLOC1-2015-399 	Job Status	OPEN			
Job Type	REPAIR	Unit In	09/29/2015 04:29 PM			
Due	09/30/2015 04:29 PM	Service Status	DOWN - DOWN FOR SERVICE			
Hours Completed	1.00 / 1.00 (100.00%)	Tasks Completed	0 / 3 (0.00%)			
Projected Completion Date	10/14/2015 03:22 PM					

Tasks: 3

	Task ID	WAC	Remaining Hours
	Start 002 - ENGINE		1.00
	Start 003-000 - FUEL - TROUBLESHOOT FUEL SYSTEM		0.00
	Start TH-RP-TSK-01 - TONYA'S REPAIR TASK		0.00

New Task

Start Task

Service Requests / Defects: 1

	Code - Description
Select	Symptom: FLAT TIRE - TIRES > TIRES > A FLAT TIRE

Add / Manage

Actions

Main Page	Start Delay	View/Edit Detail
Finish Work Order	Part Actions	
Equipment History	Test Results	Related Files
Messages	Print Work Order	Component Warranty
Commercial Work	Postings	Relationships

Notes

New Note

Comments

Save Comments

Back

10. Work Order Details Page

The Work Order Details page will look different based on settings and which button you clicked to get there. For example, the Work Order Details page displays when you click the **Work Order** button on the Main Technician Portal page and when you click the **Postings** button on the Work Order Main page. This page is also known as the Postings page.

On this Work Order Details (Postings) page, you can manage the details and associated workflows for work orders including summary cost info, notes and comments, and work order postings details.

➡ To jump to a section of the details page, click the section name in the left navigation menu.

Note: On devices with smaller screens or resolutions, this navigation menu will display as shown below. Click the menu button to expand the menu.

 **Note:** For linear assets, to the right of the asset ID, there is an Attributes icon . Click this icon to see attributes and information for the liner asset.

Work Order Main						
Asset ID	BX-ASSET-004: BX-CAR-EQUIPMENT-TYPE 			Tech ID	Tech Name	Task
Station Location	BX-LOC	Repair Location	BX-LOC	No employees currently working		
Operator Name	BX-OP-00	Operator Phone	WORK PHONE			
Deployment Status ID						
Event ID						
Work Order ID	2020-10 	Job Status	OPEN			
Job Type	REPAIR	WO Meter 1	0 MILES			
Contact Name		Contact Phone	WORK PHONE			
Projected Completion Date		Contact Email	EMAIL ADDRESS			
Address		Priority	MAJOR - MAJOR RISK - 5 DAYS TO FIX			
Tasks: 3				Actions		
		Task ID	WAC	Remaining Hours		
		Start BX-NON-EXCEP - CHECKLIST NOT TRACKED BY EXCEPTION		8.00		
		Start CHECKLIST - STANDARD CHECKLIST		8.00		
		Start QA-RP-01 - QA REPAIR TASK 1		8.00		
New Task Start Task				Main Page View/Edit Detail Notes		
Service Requests / Defects: 0				Finish Work Order Part Actions Related Files		
Add / Manage				Equipment History Test Results Component Warranty		
				Messages Print Work Order		
				Commercial Work Postings Relationships		
				Work Delay		
				Delay Code ...		
				Comment		
				Start Delay		
				Title and Comments		
				Title		
				Comments		
Back Assignments						

When you click the **View/Edit Detail** button on the Work Order Main page, the complete Work Order Details page displays and gives an even better look at all the details associated with the work order. The resulting Work Order Details page looks similar to the Work Order Details (Postings) page mentioned above but it includes several additional sections below the Work Order Postings section including task summary, 3C summary, tests performed, viewing history, and date/time values information. The Serial Number column only displays if a part has a serial number.

Task Summary									
Task Code	Description	WAC	Repair Reason	Priority	Work Class	Est Hours	Update PM Schedule	Equipment Warranty	Account ID
AC1	BASIC TASKS	05	CN01	3	1	0.00		N	1000.531395.18980.000.00000
CNTASK001	TASK 001 - SUPPORTS ALL ASSET CATEGORIES		CN01	3	1	0.00		N	1000.531395.18980.000.00000

< >

3C Summary	
Edit 3C Summary	

Complaint

Cause

Correction

No tests performed.

Viewing History

Viewed by User	Date
MOLLYT - MOLLY	09/16/2015 11:29

Date/Time Values

Date and Time Out of Service	09/16/2015 11:29	Shop Downtime Begin
Date and Time In	09/16/2015 11:29	Shop Downtime End
Date and Time Due	09/17/2015 11:29	User Downtime Begin
Date and Time Opened	09/16/2015 11:29	User Downtime End
Date and Time First Labor	09/16/2015 00:00	Date and Time in Service
Date and Time Finished		
Date and Time Closed		

Back Assignments Finish Work Order Close Work Order Transfer/Defer Work

Additional sections display upon clicking the View/Edit Detail button on the Work Order Main page.

Open a Work Order in Pending Status

To open a work order in Pending status and begin posting data to it:

1. From the Work Order Details page, on the bottom of the page, click **Open Work Order**. You may also click the **Labor**, **Parts**, or **Cml** buttons to open the work order and begin posting to it.

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	1-2016-22	Job Status	PENDING
Title	SRV TEST FOR CONTACT INFO	Job Type	REPAIR
Unit In	08/31/2016 01:40 PM	Service Status	HFM - HOLD FOR MAINTENANCE
Projected Completion Date	08/10/2016 01:52 PM	Contact	SRV
Repair Reason ID	A - ACCIDENT	Work Class	
Account ID	1000.111101.00001.000.00000 - TEST	Parking Stall	
Priority ID	Q0 - QA'S PRIORITY CODE	Reference Order ID	
Contact Name	SRV	Phone	

Summary Cost Info

Labor Hours	Labor Cost	Parts Cost	Commercial Cost	Equipment Cost	Total Cost
0.00	0.00	0.00	0.00	0.00	0.00

Notes

New Note

Title and Comments

SRV TEST FOR CONTACT INFO

SRV TEST FOR CONTACT INFO

Save

Back

Assignments

Open Work Order

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

The Open Work Order dialog displays with today's date and time defaulting for Date and time in and Date and time out of service.

Open Work Order

Date and time in

08/10/2016 01:52 PM

Date and time out of service

08/10/2016 01:52 PM

Cancel

Open Work Order

2. Click **Open Work Order**.

The work order is opened and the Work Order Details page is now ready for posting.



If you had clicked the **Labor**, **Parts**, or **Cml** buttons originally, you would follow the flow as explained below in the [Labor Button](#), [Parts Button](#), and [Commercial Button](#) sections.

Section Overviews

The following provides an overview of the various Work Order Details page sections.

Header Section

On the Work Order Details page, the **Work Order ID** hyperlink takes you to the Work Order Main page. Otherwise, the remaining header information is similar to the Work Order Main page.

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
Title		Job Type	REPAIR
Unit In	09/29/2015 09:48 AM	Due	10/01/2015 09:48 AM
Work Completion	0 / 4 (0.00%)	Hours Completion	2.57 / 30.00 (8.57%)
Projected Completion Date	INSUFFICIENT DATA		
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	

Actions Buttons

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	1-2016-22	Job Status	OPEN
Title	SRV TEST FOR CONTACT INFO	Job Type	REPAIR
Unit In	08/10/2016 01:52 PM	Due	08/12/2016 01:52 PM
Service Status	HFM - HOLD FOR MAINTENANCE	Projected Completion Date	08/10/2016 01:58 PM
Contact	SRV		
Repair Reason ID	A - ACCIDENT	Work Class	
Account ID	1000.111101.00001.000.00000 - TEST		
Priority ID	Q0 - QA'S PRIORITY CODE	Reference Order ID	
Contact Name	SRV	Phone	
Summary Cost Info			

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

The Actions buttons on the Work Order Details page are the same as those on the Work Order Main page with the exception of the **Edit Basic Info**, **Equipment Usage**, **New Job**, and **Work Order Tasks** buttons. The **Edit Basic Info**, **Equipment Usage** and **Work Order Tasks** buttons are mentioned below. See the [Posting Labor Pop-ins](#) section for information about the **New Job** button. Refer to the [Main Technician Portal Page, Current Job Tab, Actions Tab Section](#) for descriptions of the other buttons.



The **Print Work Order** button is configured on the Technician Portal Settings page.

Edit Basic Info Button

The upper left portion of the Work Order Details page provides the basic Work Order information.

To use the **Edit Basic Info** button, you must be on the Work Order Details page. You can access this page from the Work Order Main page by clicking the **View/Edit Detail** button to open the Work Order Details Page.

1. Click **Edit Basic Info** to edit the basic work order information.

This displays the Edit Work Order Basic Info page.

Edit Work Order Basic Info			
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
Title		Job Type	REPAIR
Unit In	09/29/2015 09:48 AM	Due	10/01/2015 09:48 AM
Work Completion	0 / 4 (0.00%)	Hours Completion	2.57 / 30.00 (8.57%)
Projected Completion Date	INSUFFICIENT DATA		
Asset ID SRV-CAR1 Change Asset ID			
Service Status			
Repair Reason	B		BREAKDOWN
Update Changed Repair Reason from Header			
Work Class			
Priority ID	Q0		QA'S PRIORITY CODE
Account ID	1000.111101.00001.000.00000		TEST
Approved	☒		
Warranty work	YES		
Repair Site	01		FACILITY
Contact Name			
Phone			
Email Address			
Parking stall			
Hat number			
Date and Time In	09/29/2015 09:48 AM		
Date and time due	10/01/2015 09:48 AM		
Shop Downtime: Begin -	☒ 09/29/2015 09:48 AM		End -
User Downtime: Begin -	☒ 09/29/2015 09:48 AM		End -
Cancel Save			

Note: the Next PM Due Date field does not display unless the **Override next PM due date** on the Locations – Primary Information screen, Work Orders – Options tab must be enabled for the location of the work order, and the **Allow Technician to override Next PM Due Date** is set for this module.

- Enter or edit all necessary information on this page. Highlighted below are a few areas on this page where you may need some more information.
- The **Meter 1 validation** drop-down list is limited based on the permissions setting on the Special Rights tab of the User Groups screen and may include the following options: **Update the equipment record**, **Update transaction only**, and **Update transaction only on fail**.

- **Update transaction only on fail** displays in the drop-down menu when both boxes for **Accept meter for transaction purposes only**, and **Update latest meter reading for unit** are checked.
 - **Update transaction only on fail** sets the validation to NO EQ UPD if an error occurs while processing. This will not update the meter.
4. To change the asset ID, click the **Change Asset ID** button. This button will only display if the work order type is set to REPAIR.

The Change Asset ID pop-in displays.

Action	Task	Symptom	Repair Reason	Entered When	Entered By	Priority
UNASSIGN	FLAT TIRE - FT		B	01/05/2016 03:04 PM	SRV	Q0
TIRES > BRT > FT						
UNASSIGN	ANOTHER-OIL - ANOTHER OIL			05/19/2016 09:55 AM	SRV	Q0

No Comment

 The following list has some information to be aware of before changing asset IDs on linear work orders.

- When changing asset IDs, the only details that change when selecting a new asset are the asset ID and any directly linked asset details. Other items such as the account ID must be reviewed and changed manually if an update is required as these will not be changed.
- You may change the asset ID on linear work orders as long as there are no charges against the work order.
- When changing asset IDs, it is not possible to change the ID from a linear asset to a non-linear asset (and vice versa).
- When the Change Asset ID dialog initially opens for a linear work order, the work position information shows for the current work order.
- When the linear asset ID changes, the Segment/Marker/Offset (SMO) fields and linear reference slider's selected length are cleared and set to 0.

 **Note:** Any change to Asset ID or offsets on a linear work order will result in all service requests being unassigned and the user must manually re-assign service requests if desired.

5. To find the new asset ID, do the following:

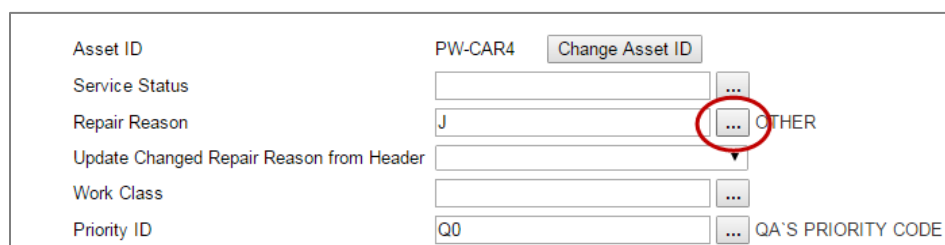
- i. On the Change Asset ID pop-in, click the  button.
- ii. Type the correct asset ID in the field, or perform a search for the correct asset ID. If you perform a search, select the correct asset ID from the search results. This changes the Asset ID field to show the new ID.
- iii. Click **Save**.

You are returned to the Edit Work Order Basic Info page with the new asset ID displayed.

- iv. If you are done editing information, you can click **Save** on the Edit Work Order Basic Info now and you will be returned to the Work Order Details page. If you are not done, continue editing the basic info fields.

6. To change the repair reason, perform the following:

- i. Click the  button next to Repair Reason choice-list.



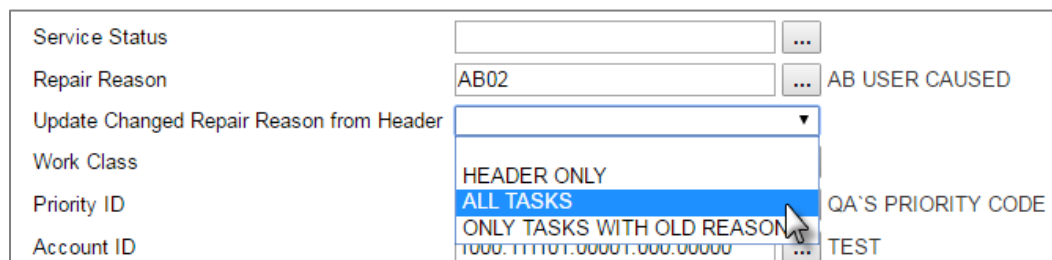
Asset ID	PW-CAR4	Change Asset ID
Service Status		...
Repair Reason	J	... OTHER
Update Changed Repair Reason from Header		
Work Class		...
Priority ID	Q0	... QA'S PRIORITY CODE

The Select Repair Reason pop-in displays.

- ii. Click the **Search** button to bring up a list of repair reasons. To shorten this list, type in the first few letters of the reason you want before clicking **Search**.
- iii. Select the correct reason from the list.

This changes the repair reason on the Edit Work Order Basic Info page. You have changed the repair reason, but you must specify what to update, or a validation message will occur.

- iv. Click the drop-down selection box for **Update Changed repair reason from header**.



Service Status		...
Repair Reason	AB02	... AB USER CAUSED
Update Changed Repair Reason from Header		
Work Class		
Priority ID		... QA'S PRIORITY CODE
Account ID	1000.111101.00001.000.00000	... TEST

- v. Select the correct option from the list to indicate what to update with the changed repair reason. This list includes the following reasons: HEADER ONLY, ALL TASKS, ONLY TASKS WITH OLD REASON.
7. At the bottom of the Edit Work Order Basic Info page, click **Save** to save all changes that you have made to this information.

Equipment Usage Button

The **Equipment Usage** button allows you to enter usage tickets.



The ability to enter equipment usage on work orders depends on your configuration. Check the box **Allow charging usage on work orders** on the Basic Info tab of the Pool Vehicle/Resource Types screen to allow usage ticket entry on work orders. Refer to the online Help for additional information about configuring Shop Activity and Motor Pool for equipment usage.

The screenshot displays the 'Pool Vehicle/Resource Types' configuration screen. At the top, there is a header bar with the title 'Pool Vehicle/Resource Types' and a search icon. Below the header, there are buttons for 'Search', 'Reload', and 'Sort', along with dropdown menus for 'Select Filter' and 'Select Sort'. To the right of these are buttons for 'New', 'Copy', and 'Delete'. The main content area is divided into a left sidebar with tabs: 'Basic Info' (selected), 'Availability Adjustment', 'Rental Rates', 'Other Types', 'Supported Locations', and 'Statistics'. The 'Basic Info' tab is active, showing a form with fields for 'Description', 'Screen message', and 'Print message'. Below these are checkboxes for 'Capacity - maximum number of passengers', 'Outside rental agency vehicle type', 'Rental agency ID', 'Active', and 'Allow charging usage on work orders'. The 'Allow charging usage on work orders' checkbox is highlighted with a red oval.

Row #	Pool vehicle/resource type	Description

Basic Info

Description

Screen message

Print message

Capacity - maximum number of passengers

☐ Outside rental agency vehicle type

Rental agency ID

☐ Active

☐ Allow charging usage on work orders

To enter usage tickets:

1. On the Work Order Details page, click the **Equipment Usage** button to enter usage ticket information for the asset.

The Enter Usage Ticket dialog displays. This dialog supports multiple usage ticket entry (one at a time) for a work order (typically used to record use of any asset that was required to accomplish the work).

Enter Usage Ticket

Usage Ticket Information

Equipment ID ...

Usage date 04/10/2013

Task ID ...

Hours used

Meter 1 begin Meter 1 end Meter 1 validation

Meter 2 begin Meter 2 end Meter 2 validation

Account ID 1105128000 ... **FLEET AND FACILITIES MANAGEMENT**

2. Complete the fields in the dialogue page. Then click one of the following buttons:
 - Click **Save** to save the usage ticket.
 - Click **Cancel** (same as clicking the X in top right corner) to close the dialog. A prompt indicates you will lose any unsaved changes.
3. Upon a successful save, you are prompted to enter another usage ticket. Click one of the following buttons:
 - Click **OK** to continue
 - Click **Cancel** to close the dialog and refresh the parent page.
4. Once you are done entering tickets and have gone back to the Work Order Details page, the equipment usage displays in the Work Order Postings section on the Work Order Details page.

Work Order Tasks Button

The **Work Order Tasks** button takes you to the Work Order Tasks Details page to delete a task or update task information.

Work Order Tasks

Asset ID	001207: 1FAFP5825YG187558 2000 FORDX TAURUS WHITE FORD TAURUS STATION WAGON 4DOOR			
License Number	G44856	Repair Location	GG - 6TH ST LT EQ GARAGE	
Work Order ID	1000-2011-1	Job Status	OPEN	
Job Type	PM	PM Service	B - PM-B	
PM Scheduled	11/01/2007 21:00	Unit In	09/01/2011 08:48	
Due	09/03/2011 08:48	Meter 1	42484 MILES	
Hours Completed	143.43 / 143.60 (99.88%)	Tasks Completed	0 / 7 (0.00%)	

Tasks : 7

Delete	Task ID	Task Description	Equip Warranty	WAC	Repair Reason	Account ID	Update PM Schedule	Location	Date and time completed
☐	02-004	HOOD	☐	10	A			1000	
☐	1507	STEERING SHAFT U-JOINT	☐	09	A			1000	
☐	15083	R/R STEERING WHEEL	☐	10	A			1000	
☐	1550	STEERING / TROUBLESHOOTING	☐	01	A			1000	
☐	B	PM-B	☐	01		1103234010		1000	
☐	BRK	BRAKE SYSTEM	☐	01	A	1103234010		1000	
☐	C	PM-C	☐	06		1103234010		1000	

Back
Save

Summary Cost Information Section

The Summary Cost Information section provides summary costs as configured on the Technician Portal Settings page.



Commercial always shows if another cost is displayed.

Title and Comments

The Comment/Notes section displays depending on your settings (similar to the real-time Work Order Main page). Please refer to the Work Order Main Page (Real -Time) [Notes/Comments Section](#) for more information. The notes displayed in this section include all the notes pertaining to the work order (see screenshot below). The **New Note** icon is discussed below in the [Service Request Tasks](#) section.

Work Order Postings

This section provides detail on the tasks, service requests, and other postings for the specified Work Order. In addition to 3C information, it includes remaining hours, SRT, WAC and links to procedure information.

Work Order Postings										
Complaint	BREAKS - TASK DEFAULT COMPLAINT COMMENT								Edit Labor New Task Parts Cmt	
Cause	FAULT-1 - TASK DEFAULT CAUSE COMMENT									
Correction	TASK DEFAULT CORRECTION COMMENT									
Task	001-000 - ELECTRICAL - CHANGE LIGHT BULBS									
Comment	MY NEW COIMMENT									
001-000 - ELECTRICAL WORK GROUP - ELECTRICAL - CHANGE LIGHT BULBS				Remaining Hours: 0.50	SRT: 0.50	WAC:				
004-002 - BRAKE TASKS - TEST CONNECTIONS				Remaining Hours: 0.00	SRT:	WAC:				
123456 - ELECTRICAL - REWIRE HEADLIGHTS				Remaining Hours: 0.00	SRT:	WAC:				
Complaint	NOT APPLYING FULLY - ROLLING STOCK BREAK SYMP GROUP > BREAK NOT APPLYING FULLY								Edit Labor New Task Parts Cmt	
Comment	SR 551 COMMENTS. SR 551 COMMENTS. SR 551 COMMENTS. SR 551 COMMENTS. SR 551 COMMENTS. ...									
001-000 - ELECTRICAL WORK GROUP - ELECTRICAL - CHANGE LIGHT BULBS				Remaining Hours: 0.50	SRT: 0.50	WAC:				
001-001 - ELECTRICAL WORK GROUP - ELECTRICAL - REWIRE HEADLIGHTS										
001-002 - ELECTRICAL WORK GROUP - ELECTRICAL - REPLACE WIRING										
Complaint	BW1 - BROKEN WINDOW > BROKEN WINDOW SYMPTOM 1								Edit Labor New Task Parts Cmt	
Comment	SR 552 COMMENTS. SR 552 COMMENTS. SR 552 COMMENTS. SR 552 COMMENTS. SR 552 COMMENTS. ...									
004-002 - BRAKE TASKS - TEST CONNECTIONS				Remaining Hours: 0.00	SRT:	WAC:				
004-003 - BRAKE TASKS - TEST BRAKE PADS										
Tasks not on Service Requests										
TIR-01 - TIRE REPAIR GROUP - TASK: TIRE INSTALLATION				Remaining Hours: 0.00	SRT: 0.00	WAC:				
TIR-02 - TIRE REPAIR GROUP - TASK: TIRE REPLACEMENT				Remaining Hours: 0.00	SRT:	WAC:				
TIR-03 - TIRE REPAIR GROUP - TASK: TIRE REMOVAL				Remaining Hours: 0.00	SRT:	WAC:				
Task Summary										
Task Code	Description	WAC	Work Class	Est Hours	Total number of times task performed	Standard Repair Time	Update PM Schedule	Equipment Warranty	Account ID	Cor
001-000	ELECTRICAL WORK GROUP - ELECTRICAL - CHANGE LIGHT BULBS			0.50	1	0.50		N		
004-002	BRAKE TASKS - TEST CONNECTIONS			0.00	1			N		
123456	ELECTRICAL - REWIRE HEADLIGHTS			0.00	1			N		
TIR-01	TIRE REPAIR GROUP - TASK: TIRE INSTALLATION			0.00	1	0.00		N		
TIR-02	TIRE REPAIR GROUP - TASK: TIRE REPLACEMENT			0.00	1			N		
TIR-03	TIRE REPAIR GROUP - TASK: TIRE REMOVAL			0.00	1			N		

Service Request Tasks Section

Work Order Postings									
Service Request	GI-PH-2019-0001-379								Labor Parts Commercial New Task New Fault
Complaint	SEIZING UP - ROLLING STOCK BRAKE SYMP GROUP > BRAKE SEIZING UP								
Cause	FAULT-1 - TASK DEFAULT CAUSE COMMENT								
Correction	TASK DEFAULT CORRECTION COMMENT								
Comment	BRAKE ISSUE NOTED BY OPERATOR, NEED TO INVESTIGATE RELATED FAULT AND PERFORM RCA.								
Faults	B2424 J1939								

The header of the service request tasks section displays the Service Request ID link, Complaint, Cause, Correction, Comment, Tasks and Faults links information for the

service request. The action buttons allow you to edit the service request, add a new task to the service request, and post labor, parts, or commercial information to the service request. Task information will display only if it has data.

The Complaint, Cause, and Correction fields will always display the first line of the comment text if 3Cs are required by the system, otherwise only fields with data will display. To view a pop-in with the full 3C details, hover over the field or click the  Expander icon.

Click the  to view Procedures & Comments including information about Tasks, Faults, Service Request Comments and Work Order Comments.

Fault information also displays if applicable. Clicking the Fault code launches the Procedures & Comments page which displays task, faults, service request comments, and work order comments regarding the fault.

The Work Accomplished Code (WAC) may also display in the task row.

 When the shop location's settings require WAC codes on work order tasks, the WAC is highlighted in yellow, to indicate that one or more tasks are missing a final WAC status.

The header also displays which task on the service request corrected the failure.

Service request tasks show below the header information in gray. Click the task to link to open the [Work Order Task](#) page.

The following icons can be found in the tasks section

Icon	Description
	An oil can icon will show in the task row if the task is a PM or Inspection task. A blue can represents a completed task and a yellow can indicates an incomplete task. Clicking the oil can icon takes you to the Work Order PM Checklist page. See the PM Checklist Button section for more information about the Work Order PM Checklist page.
	Indicates there is a preventive maintenance checklist item, which is exception-based, has failed.
	The pending part request icon may also appear in the task row. This icon indicates that pending part request exist. See the Pending Part Request Icon section below for more information about pending part requests.
	The new note icon in the task row allows you to add notes at the task level. Clicking the new note icon takes you to the Notes pop-in. Please refer to the Add a Note section for more information about using the Notes pop-in to add notes. When adding a task level note through the new note icon, the note displays as shown in the following screenshot.

Icon	Description
	The procedure viewer icon allows access to viewing the procedure for the task without having to leave the page.
	Expands the content to view all information associated with the field.
	A return part icon allows you to return issued parts. Refer to the Pending Part Requests and Return Part Icons section below for more information about returning parts.
	Warranty Unknown icon shows if it is unknown if there is a warranty for this WO or task.
	This WO or task has work being done under a warranty.

Below each task are the **Labor**, **Parts**, **Commercial** and **Notes** postings associated with that task on the service request.

Similar to other pages in Web Modules, you can click the + to see additional information for specific postings.

Labor Button

The **Labor** button takes you to the Post Work Order Labor pop-in to post labor to the service request or work order. Please refer to the [Post Work Order Labor Pop-in](#) section for more information about posting labor.

Parts Button

The Parts button takes you to the Post Work Order Parts pop-in to post parts (issue or request parts) to the service request or work order. Please refer to the [Post Work Order Parts Pop-in](#) section for more information about posting parts.

Commercial Button

The **Commercial** button (Cml) takes you to the Post Work Order Commercial Work pop-in to post commercial work to the service request or work order. Please refer to the [Post Work Order Commercial Work Pop-in](#) section for more information about posting commercial work.

New Task Button

The **New Task** button takes you to the Add Work Order Tasks pop-in. Refer to the [Adding a Task to Work Orders and Service Requests](#) section for more information about adding tasks.

New Fault Button – Fault Detail

The New Fault button takes you to the Fault Detail which allows you to create, edit, or delete information on specific faults.

Fault Detail

Basic Information

Asset ID: NISSAN-V-001 2012 NISSAN MURANO BLACK SUV CAR

Fault Code: ENGINE-HOT ENGINE FAULT - HOT

Description: APPEARS TO BE ALMOST OVERHEATING

Datetime Occurred: 16/07/2020 13:59

Service Request: NISSAN-V-001-256

Severity:

Action Type:

Times Occurred: 0

Codes

Source Type:

Subsystem:

Subsystem Code:

Element:

Element Type:

Element Code:

Range Type Code:

Readings

Meter 1: 0

Latitude:

Longitude:

Direction:

Speed: 0

Procedure

CHECK ENGINE FLUIDS

The Fault Detail displays.

Edit Button

The **Edit** button takes you to the Service Request/Defect page to edit the service request. Refer to the [Service Request/Defect Page](#) section for more information about editing service requests.

Tasks Not on Service Requests Section

The tasks not on service requests display in the bottom portion of the Work Order Details page. The only differences between this section and the tasks on service requests section are the absence of a service request header and an Edit button. The Labor, Parts, Commercial, and New Task buttons and New Note icon  operate the same as those in the service request section but link information to the tasks not on service requests. Refer to the [Service Request Tasks](#) section above for details about the icon and action buttons.

Tasks not on Service Requests					Labor	Parts	Cml	New Task
001 - ELECTRICAL SYSTEM			Remaining Hours: 8.43	WAC:				
A - PM SERVICE A			Remaining Hours: 13.52	WAC:	PM Checklist Report			
Labor:								
Date	Technician	WAC	Hours	Cost				
08/10/2016	SRV - SARAH VICKERS		0.27	5.89				
Total:			0.27	5.89				
AC1 - BASIC TASKS			Remaining Hours: -0.58	WAC:				
Labor:								
Date	Technician	WAC	Hours	Cost				
08/10/2016	SRV - SARAH VICKERS		0.58	12.64				
Total:			0.58	12.64				
AC1-PM - BASIC PM TASKS			Remaining Hours: -8.10	WAC: 05				
Labor:								
Date	Technician	WAC	Hours	Cost				
08/10/2016	SRV - SARAH VICKERS	05 - CLEANED	0.03	0.65				
08/10/2016	SRV - SARAH VICKERS	05 - CLEANED	8.00	174.40				
08/09/2016	SRV - SARAH VICKERS		0.07	1.53				
Total:			8.10	176.58				

Task Summary Section

Task Summary									
Task Code	Description	WAC	Repair Reason	Priority	Work Class	Est Hours	Update PM Schedule	Equipment Warranty	Account ID
001	ELECTRICAL SYSTEM		B	Q0		10.00		N	1000.111101.00001.000.00
A	PM SERVICE A			Q0		13.79		N	1000.111101.00001.000.00
AC1	BASIC TASKS		B	Q0		0.00		N	1000.111101.00001.000.00
AC1-PM	BASIC PM TASKS	05		Q0		0.00		N	1000.111101.00001.000.00
CNINSPECT00	INSPECTION 001			Q0	1	5.00		N	1000.111101.00001.000.00
CNTASK005	CN REPAIR GROUP - TASK 005 - ALWAYS ON REPAIR WORK ORDERS / PM		B	Q0		15.00		N	1000.111101.00001.000.00

The Task Summary section provides information about all the tasks on the work order including what service request the task is on as well as if the task corrected the failure represented by those service requests. In this section, you may click the **Task ID button** to go to the Work Order Task page. See the [Work Order Task Page](#) section for information about updating task fields.

3C Summary Section

This section provides information about the 3Cs (complaint, cause, and correction warranty). To edit the 3C information, click the **Edit 3C Summary** button, complete the fields, and then click **Save**.

3C Summary	Edit 3C Summary
Complaint	
Cause	
Correction	

Tests Performed Section

Tests performed are listed in the Tests Performed section. Click the **Test Details** button to view or edit test details or to start a new test. Refer to the [Work Order Test Results Pages](#) section for more information about test results.

Tests Performed				
Test Details				
Test ID	Test Type ID	Test Type Description	Started	Result
353645	RGTEST3	RG TEST3	09/23/2015 16:49	IN PROGRESS

Viewing History

This area lists viewing history for the work order and can be used to verify who has reviewed the work order instead of closing it. Clicking the arrow  sorts the list by (ascending/descending) date.

Viewing History	
Viewed by User	Date
MAXQ - MAXQ	11/21/2018 12:11
LAT - LAT	10/31/2018 07:18

Technicians who have reviewed the work order will display in this table. The date indicates the first time they reviewed the work order but will not update based on when they last viewed it.



Note: Users do not have to edit rights to be logged into this table.

Date/Time Values Section

Various date/time information for the work order shows in this section.

Date/Time Values			
Date and Time Out of Service	09/16/2015 11:29		Shop Downtime Begin
Date and Time In	09/16/2015 11:29		Shop Downtime End
Date and Time Due	09/17/2015 11:29		User Downtime Begin
Date and Time Opened	09/16/2015 11:29	MOLLYT - MOLLY	User Downtime End
Date and Time First Labor	09/16/2015 00:00		Date and Time in Service
Date and Time Finished			
Date and Time Closed			

Back and Finish/Reopen/Close Work Order Buttons

The **Back** button takes you to the Main Technician page.

Whether you see a **Finish Work Order** button depends on user rights. The **Finish Work Order** button is disabled if the user does not have control rights to check the Work Finished box in the Work Order Center screen on the Basic Info tab (as seen below). The button is either hidden or disabled depending on whether the user has rights to view or edit the control, respectively.

The screenshot shows the 'Basic Info' tab of a work order form. The form contains various fields for job details, including Job type (REPAIR), Equipment ID (KGCAR1), License number, Date and time out of service (09/27/2013 16:40), Date and time in (02/09/2012 01:31), Date and time due, Date and time opened, Date and time first labor, Shop downtime begin, Shop downtime end, User downtime begin, User downtime end, Date and time finished (circled in red), Date and time closed, and Date and time in service. The 'Date and time finished' field is currently empty and has a red circle around it, indicating it is a control that affects the visibility of the 'Finish Work Order' button.

Clicking the **Finish Work Order** button on the Work Order Details page completes the work order for the technician and removes the work order from the technician's list of work orders.

 **Note:** If there are incomplete test results, the user is prompted to complete the test results before the work order can be finished or closed. If setting is set to ALWAYS REQUIRE PM Check List Items Completion, the following message displays, "PM Checklist(s) exist. Cannot finish work order."

The Work Order status remains "Work Finished" until the supervisor closes out the work order. Upon clicking the **Finish Work Order** button, it becomes a **Reopen Work Order** button. Clicking the **Reopen Work Order** button opens the Notes pop-in. The technician can then click the **Reopen WO** button on the Notes pop-in to set the work order status to OPEN, and add the work order back to the technician's list of work orders.

 **Note:** A **Close Work Order** button may be displayed/hidden depending on UI Control rights. There is also a setting in Technician Settings to allow techs to close work orders. If the setting allows Technicians to close work orders and no pending part return requests exist, the **Close Work Order** button displays. Clicking **Close**

Work Order will not check if PM checklists are completed before setting the work order to closed status. Upon clicking the **Close Work Order** button, the work order is closed and the work order is no longer displayed on the list.

Posting Labor Pop-ins

You can post labor by clicking **New Job** or **Labor** on the Work Order Details page. Depending on which button you click, either the New Job pop-in or the Post Work Order Labor pop-in displays. The look of the pop-in depends on settings and on which button you clicked. The following sections provide information about how the **New Job** and **Labor** buttons work with regards to service requests and how to use each button to post labor.

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
Title		Job Type	REPAIR
Unit In	09/29/2015 09:48 AM	Due	10/01/2015 09:48 AM
Work Completion	0 / 7 (0.00%)	Hours Completion	34.79 / 43.79 (79.45%)
Projected Completion Date	INSUFFICIENT DATA		
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	

Summary Cost Info

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

Work Order Postings

Equipment Usage

Equipment ID	Usage Date	Operator ID	Task ID	Account ID	Hours Used	Cost
SRV-CAR1 - BLAZIN FIRE	03/09/2016	SRV - SARAH VICKERS	001 - ELECTRICAL SYSTEM	1000.111101.00001.000.00000 - TEST	2.00	0.00

Complaint

CN-SYMPOM-001 - DESCRIPTION: SYMPTOM 001

Edit

Labor

New Task

Parts

Cml

New Job Pop-in

Based on Work Order Location Settings, the **New Job** button allows you to create a new service request, post labor to a service request, and to select a specific service request to post labor to (when multiple service requests exist on the work order).

Work Order Details																	
Asset ID	RACAR16: RASNCAR16 2012 HONDA CIVIC GRAY MOTOR POOL SEDAN																
Life Meter 1	5000 MILES	Repair Location	RALOC-1 - RICHARD'S TEST LOCATION #1														
Work Order ID	JHLOC1-2015-19	Job Status	OPEN														
Job Type	REPAIR	Unit In	09/17/2015 09:19 AM														
Due	09/18/2015 09:19 AM	Service Status	RA-PART - PART REQUEST SERVICE STATUS														
Meter 1	5000 MILES (EQ UPD)	Tasks Completed	0 / 1 (0.00%)														
Projected Completion Date	09/17/2015 11:59 AM																
Summary Cost Info <table border="1"> <thead> <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>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> </tr> </tbody> </table>						Labor Hours	Labor Cost	Parts Cost	Commercial Cost	Equipment Cost	Total Cost	0.00	0.00	0.00	0.00	0.00	0.00
Labor Hours	Labor Cost	Parts Cost	Commercial Cost	Equipment Cost	Total Cost												
0.00	0.00	0.00	0.00	0.00	0.00												
Notes New Note																	
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																	

After clicking the **New Job** button on the Work Order Details page, the New Job pop-in displays. The look of the pop-in depends on settings and whether service requests exist on the work order. The examples in this section show how to use the **New Job** dialog.

Please refer to the [Post Work Order Labor Pop-in](#) section for information about posting labor via the **Labor** button.

The **New Job** button is highlighted when no service requests exist on the work order.

The New Job flow is only valid with equipment work orders (not part rebuilds).

Create a New Service Request and (Optional) Post Labor

When no service requests exist on the work order, the New Job dialog displays the Create New SR tab with empty fields. Complete the service request fields and click **Save** to save the service request to the work order.

New Job

Service Request

Unassigned SRs Assigned SRs Create New SR

Select	Symptom / Task	Comments
Select	Symptom: QA-01 - TESTING SYMPTOM 1 Task: QA-RP-01 - QA REPAIR TASK 1	
Select	Symptom: QA-01 - TESTING SYMPTOM 1	

Add Labor Posting - Line 1

Technician BX-EMP BRYAN EMP

Task ID ...

☐ Corrected Failure

WAC ...

Start ... End ...

Hours

Time Code QA-REG ... QA REG TIME

Classification ...

Account ID ...

Repair Reason ...

Comments

Pending Labor Postings

Line	Task ID	Start	End	Technician	WAC	Hours	Time Code	Classification
------	---------	-------	-----	------------	-----	-------	-----------	----------------

To create a new service request:

1. Complete the fields as desired in the Service Request section: Standard Job, Complaint (Symptom), Cause, Correction, and Task ID.
 - i. Use the Select icon  to select from the available entries based on the specific work order and field selected.
 - ii. Use the **Lookup** button to go to the Choose a Task pop-in where you may search for a task or choose a tab and select the desired task.

Choose a Task

Repair Tasks PM Services Inspections Standard Jobs Task Search

Jump to

Task ID	Description
001	HVAC
043	EMISSIONS
A00	TROUBLESHOOTING
A01	HVAC
A02	GLASS - BODY - INTERIOR
A03	GUAGES AND WARNING DEVICES
A13	BRAKES
A15	STEERING
A16	SUSPENSION
A17	TIRES
A19	ELECTRICAL

Cancel

2. Go to the next section to post labor to the service request. Otherwise, click the **Save** button to save the service request.

New Job

Service Request

Select Different SR

Symptom BREAKS - ROLLING STOCK BREAK SYMP GROUP

Complaint TASK DEFAULT COMPLAINT COMMENT

Fail / Cause Code FAULT-1 FAILURE CODE 1

Cause TASK DEFAULT CAUSE COMMENT

Correction TASK DEFAULT CORRECTION COMMENT

Tasks Correcting Failure 001-000

Add Labor Posting - Line 1

Technician

Task ID

Total number of times task performed

☐ Corrected Failure

WAC

Date

Hours

Time Code STANDARD STANDARD DIRECT

Classification

Account ID

Repair Reason

Comments

Undo Add

Pending Labor Postings

Line	Task ID	Date	Technician	WAC	Hours	Time Code	Classification
------	---------	------	------------	-----	-------	-----------	----------------

The new service request shows on the Work Order Details page.

Work Order Postings	
Complaint	POT HOLE - POT HOLE OR CRACK IN ROAD
Cause	AC-DIRTY - COVERED IN FILTH
WAC	17 - REPAIRED
Correction	CLEANED
Task	AC1 - BASIC TASKS
AC1 - BASIC TASKS Remaining Hours: 0.00 WAC:	
Tasks not on Service Requests Labor Parts Cml New Task	
Back Finish Work Order Close Work Order	

To post labor to the service request:

1. Complete the Add Labor Posting – Line 1 fields.

The Technician defaults on the pop-in.

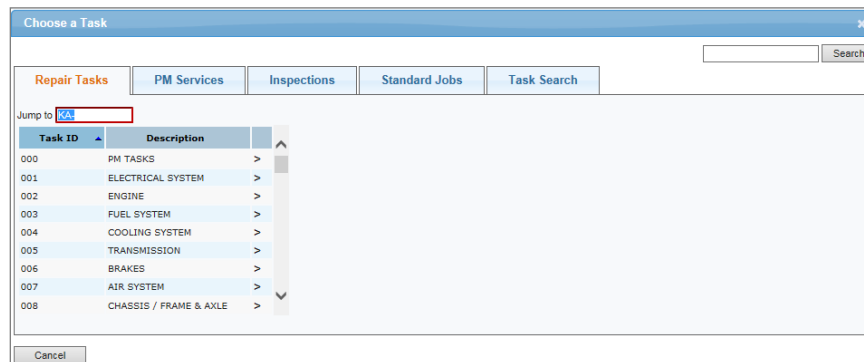
New Job	
Service Request	
Select Different SR	
Symptom	BREAKS - ROLLING STOCK BREAK SYMP GROUP
Complaint	TASK DEFAULT COMPLAINT COMMENT
Fail / Cause Code	FAULT-1 ... FAILURE CODE 1
Cause	TASK DEFAULT CAUSE COMMENT
Correction	TASK DEFAULT CORRECTION COMMENT
Tasks Correcting Failure	001-000 X
Add Labor Posting - Line 1	
Technician	...
Task ID	... Lookup
Total number of times task performed	
☐ Corrected Failure	
WAC	...
Date	...
Hours	
Time Code	STANDARD ... STANDARD DIRECT
Classification	...
Account ID	...
Repair Reason	...
Comments	
Undo Add	
Pending Labor Postings	
Line	Task ID
Date	Technician
WAC	Hours
Time Code	Classification

- Enter or select a Task ID using the Select icon or the **Lookup** button.



Note: If only one task exists for the service request or work order, that task will default in the field.

- Clicking the Select icon  limits the selection to those tasks that are on the service request or work order.
- The **Lookup** button takes you to the Choose a Task pop-in to select a task from the list and it will automatically populate the Task ID field. Tabs displayed depend on data conditions.



Task ID	Description
000	PM TASKS
001	ELECTRICAL SYSTEM
002	ENGINE
003	FUEL SYSTEM
004	COOLING SYSTEM
005	TRANSMISSION
006	BRAKES
007	AIR SYSTEM
008	CHASSIS / FRAME & AXLE



Note: The **Corrected Failure** checkbox can be used to indicate that the specified task corrected the failure issue.

- Enter or select a WAC using the Select icon .
- Enter the Date (mm/dd/yyyy) or use the Calendar icon  to select the date and enter Hours. Depending on your settings, you may either select a start Date and enter the Hours or select Start/End Dates and the hours are calculated upon selecting the start and end times.
- The date format depends on your Work Order Location Settings.
- The Time Code defaults. Use the Select icon  to select a different time code.
- Enter or select an Account Code.
- Enter or select a Repair Reason.
- Add Comments if desired.
- Check the No Parts Needed box (if applicable)



The technician only needs to enable the **No Parts Needed** box once per task to which it applies. When technicians flag **No Parts Needed** on the task, it is not necessary to go into each posting to set the flag. Likewise, if the flag is set when posting labor, it is automatically set on

the task. If there are multiple postings under a single task and one posting is flagged, the task is automatically flagged.

- Click the **Add** button.

New Job

Service Request

Existing SRs Create New SR

	Symptom / Task	Comments
Select	Symptom: BW1 - 1111	SR COMMENT SR COMMENT SR COMMENT SR COMMENT SR COMMENT SR COMMENT SR COMMENT SR COMMENT SR
Select	Symptom: BREAKS - TASK DEFAULT COMPLAINT COMMENT 1	COMMENT SR COMMENT SR COMMENT SR COMMENT SR COMMENT SR COMMENT SR COMMENT SR

Add Labor Posting - Line 1

Technician ...

Task ID ...

WAC ...

Date

Hours

Time Code ...

Classification ...

Account ID ...

Repair Reason ...

Comments

Pending Labor Postings

Line	Task ID	Date	Technician	WAC	Hours	Time Code	Classification
------	---------	------	------------	-----	-------	-----------	----------------

The labor posting shows in the Pending Labor Postings section at the bottom of the page.

Account ID ...

Repair Reason ...

Comments

Pending Labor Postings

	Line	Task ID	Start	End	Technician	WAC	Hours	
	1	AC1	09/17/2015 06:20 AM	09/17/2015 01:20 PM	MOLLY-EMP	17	7.00	

- Click the **Edit** icon to edit the pending labor posting.

The pending labor posting line turns gray and may be edited.

4. Edit the posting fields as desired and click **Update** to update the labor posting.

Time Code: STANDARD DIRECT

Account ID: 1000.531395.18980.000.00000

Repair Reason: CND1 REPAIR REASON MAX CHARACTER 01

Comments:

Buttons: Undo, Update

Pending Labor Postings

	Line	Task ID	Start	End	Technician	WAC	Hours
☒	1	AC1	09/17/2015 06:20 AM	09/17/2015 01:20 PM	MOLLY-EMP	17	7.00

Buttons: Cancel, Save

5. Click **Save** to post labor to the new service request.

The service request and task with labor posted to it show on the Work Order Details page.

Work Order Postings

Complaint	POT HOLE - POT HOLE OR CRACK IN ROAD
Cause	AC-DIRTY - COVERED IN FILTH
WAC	17 - REPAIRED
Correction	REPAIRED
Task	AC1 - BASIC TASKS

Buttons: Edit, Labor, New Task, Parts, Cml

Service Request

AC1 - BASIC TASKS

Remaining Hours: -0.17 WAC: 17

Task with posted labor

Start	End	Technician	WAC	Hours	Cost
09/17/2015 01:10 PM	09/17/2015 01:20 PM	MOLLY-EMP - MOLLY	17 - REPAIRED	0.17	5.30
Total:				0.17	5.30

To post labor to an existing Service Request:

The New Job dialog looks different depending if there are one or multiple service requests on the work order.

When one service request exists on the work order, the New Job dialog provides the service request information at the top of the dialog, Fields in the Add Labor Posting area are defaulted from the service request and a **Select Different SR** link displays.

To post labor to the service request:

1. Click **New Job**.
2. Select the service request (SR) you need to add labor to.

New Job	
Existing SRs Create New SR	
Select	Symptom / Task
Select	Symptom: CN-SYMPOM-001 - DESCRIPTION: SYMPTOM 001
Select	Symptom: QA-SYMP-CRACK - QA SYMPTOM FOR CRACK Task: 001 - ELECTRICAL SYSTEM

Comments: SYMPTOM 001

Add Labor Posting - Line 1

Technician: SRV SARAH VICKERS

- Complete the add labor posting fields as outlined in the [To post labor to the service request](#) topic of the [Create a New Service Request and \(Optional\) Post Labor](#) section. If you selected the wrong SR, skip to the next step.

New Job

Service Request

Select Different SR

Complaint: 1111

Fail / Cause Code: FAULT-1 FAILURE CODE 1

Cause: 2222

Correction: 3333

Add Labor Posting - Line 1

Technician: ...

Task ID: ... Lookup

WAC: ...

Date: ...

Hours: ...

Time Code: STANDARD STANDARD DIRECT

Classification: ...

Account ID: ...

Repair Reason: ...

Comments: ...

Undo Add

Pending Labor Postings

Line	Task ID	Date	Technician	WAC	Hours	Time Code	Classification
------	---------	------	------------	-----	-------	-----------	----------------

Cancel Save

- If you selected the wrong SR, click the **Select Different SR** link. If there is only one service request on the work order, when you click the **Select Different SR** link, it takes you to the dialog's Existing SRs tab view with the current service request listed.
- Click the **Create New SR** tab to create a new service request.

New Job

Existing SRs **Create New SR**

	Symptom / Task	Comments
Select	Symptom: POT HOLE - POT HOLE OR CRACK IN ROAD Task: CNTASK001 - TASK 001 - SUPPORTS ALL ASSET	

The **Create New SR** tab displays.

New Job

Existing SRs **Create New SR**

Complaint (Symptom) ...

Cause ...

WAC ...

Correction

Task ID ...

Add Labor Posting - Line 1

Technician MOLLY-EMP MOLLY

Task ID CNTASK001 ... TASK 001 - SUPPORTS ALL ASSET CATEGORIES

WAC ...

Start ... End ...

Hours

From Marker 37900 ... From Offset 8.0000

To Marker 37900 ... To Offset 27.0000

Time Code DI ... STANDARD DIRECT

Account ID 1000.531395.18980.000.00000 ... AUTOMATIC TRAIN CONTROL

Repair Reason CN01 ... REPAIR REASON MAX CHARACTER 01

Comments

Pending Labor Postings

Line	Task ID	Start	End	Technician	WAC	Hours
------	---------	-------	-----	------------	-----	-------

To view faults on an existing service request:

1. Select an existing service request from the New Job pop-in.
2. Add a Fault Code to the Faults field and click **Save**.

New Job

Service Request

Select Different SR

Symptom QA-01 - TESTING SYMPTOM 1

Complaint TESTING SYMPTOM 1

Fail / Cause Code

Cause

Correction

Tasks Correcting Failure

Faults

Add

A FAULT CODE 2 X

* NON-LINEAR ASSET FAULT CODE X

To create the new service request:

1. Complete the service request fields (as outlined in **step 1** in the [New Job Pop-in, Create a New Service Request and \(Optional\) Post Labor](#) section above) and click **Save**.

You may also post labor to this new service request (prior to saving it) by completing the Add Labor Posting information as outlined in the **To post labor to the service request** topic of the [Create a New Service Request and \(Optional\) Post Labor](#) section.

When multiple service requests exist on the work order, the New Job dialog displays the Existing SRs tab with the service requests and tasks listed.

New Job

Existing SRs Create New SR

	Symptom / Task	Comments
Select	Symptom: KASYMP-BENT - BENT - BASIC AND ASSET	
Select	Symptom: QA-SYMP-CRACK - QA SYMPTOM FOR CRACK Task: 001 - ELECTRICAL SYSTEM	

2. Click **Select** to post labor to that particular service request.

You may also create a new service request from here by clicking the **Create New SR** tab and completing the service request fields (as outlined in step 1 of the [New Job Pop-in, Create a New Service Request and \(Optional\) Post Labor](#) section above).

New Job

Existing SRs Create New SR

	Symptom / Task	Comments
Select	Symptom: KASYMP-BENT - BENT - BASIC AND ASSET	
Select	Symptom: QA-SYMP-CRACK - QA SYMPTOM FOR CRACK Task: 001 - ELECTRICAL SYSTEM	

Add Labor Posting - Line 1

Technician MOLLY-EMP MOLLY

Task ID ... Lookup

- Fields default from the selected service request and show in the service request area at the top of the pop-in and in the Add Labor Posting section.

New Job

Complaint (Symptom) QA-SYMP-CRACK - QA SYMPTOM FOR CRACK

Cause QA-CRACK - QA CRACK FAILURE

WAC 13

Correction FIX SHUTOFF

Task 001

Select Different SR

Add Labor Posting - Line 1

Technician MOLLY-EMP MOLLY

Task ID 001 ... Lookup ELECTRICAL SYSTEM

WAC 13

Start End ☐ No Parts Needed

Hours

From Marker 37900 ... From Offset 8.0000

To Marker 37900 ... To Offset 35.0000

Time Code DI ... STANDARD DIRECT

Account ID 1000.531395.18980.000.00000 ... AUTOMATIC TRAIN CONTROL

Repair Reason E ... NOTED IN PM

Comments

Undo Add

Pending Labor Postings

Line	Task ID	Start	End	Technician	WAC	Hours
------	---------	-------	-----	------------	-----	-------

- Click the **Select Different SR** link to select a different service request (or to create a new service request).
- Post labor to this new service request task by completing the Add Labor Posting information as outlined in the **To post labor to the service request** topic of the [Create a New Service Request and \(Optional\) Post Labor](#) section above. Please see the [Post Work Order Labor Pop-In](#) section below for additional detailed information about posting labor via the Labor button.

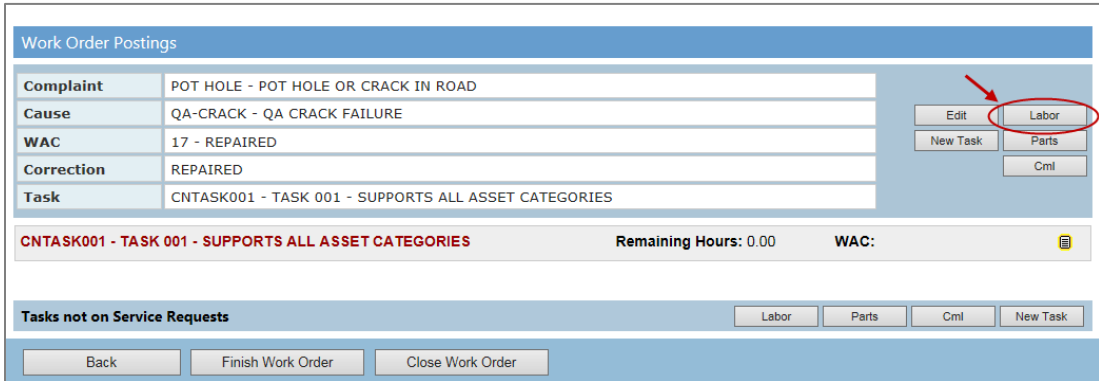
Post Work Order Labor Pop-in

As noted above, you can post labor by clicking the **New Job** button or the **Labor** button on the Work Order Details page. Upon clicking the **Labor** button, the Post Work Order Labor pop-in displays. The look of the pop-in depends on settings. The following examples show how to post labor via the **Labor** button.

 Please refer to the [New Job Pop-in](#) section for information about posting labor via the **New Job** button.

Post Labor to a Service Request Task

1. Click the **Labor** button in the service request section of the Work Order Details page to post labor to a service request task.



The Post Work Order Labor pop-in shows the Service Request information completed at the top and indicates that the labor will be posted to a task on the service request.

 Information from the Service Request defaults to the top Service Request area and the lower Add Labor Posting area.

 Note: The display of information in the Service Request section can be minimized or maximized if the portal Location Setting “Minimize showing Service Request information by default” is enabled. The **See Less** or **See More** button will appear allowing you to expand or minimize the information.

Post Work Order Labor

Service Request

Symptom: AUTO-ENGINE-HOT - ENGINE RUNNING TOO HOT

Complaint: ENGINE RUNNING TOO HOT, DASHBOARD IS LIGHTING UP

Fail / Cause Code: WEAR ... WEAR ON EQUIPMENT

Cause: WEAR ON EQUIPMENT, TINY LEAK POSSIBLE

Correction: OIL WAS TOO LOW, REFILLED TO FULL

Tasks Correcting Failure: RI-AUTO-ENG X

Faults: ... Add ENGINE-HOT X

[See less](#)

Add Labor Posting - Line 1

Technician: EMP-AC ...

Task ID: RI-AUTO-ENG ... [Lookup](#)

☒ Corrected Failure

WAC: ...

Date: 08/27/2020

Hours:

Time Code: REG ... REGULAR TIME

Classification: SYSTEM ADN ...

Account ID: ...

Repair Reason: WEAR ... WEAR AND TEAR

Comments:

[Undo](#) [Add](#)

Pending Labor Postings

Line	Task ID	Date	Technician	WAC	Hours	Time Code	Classification
------	---------	------	------------	-----	-------	-----------	----------------

[Cancel](#) [Save](#)

- Follow the steps in the [post labor to the service request](#) procedure above (in the [Create a New Service Request and \(Optional\) Post Labor](#) section) to complete the necessary information and post labor to the service request.

 When posting labor to a work order task that is related to a Service Request, you can enter the related 3C information and Fail/Cause Code to be set on the Service Request. This information will be updated on the related Service Request.

 The **Total time task will be completed** field allows you to enter standards calculation information at the time you are posting labor.

 The **Corrected Failure** checkbox allows you to indicate that the specified task corrected the failure issue.

Labor shows posted to the service request task on the Work Order Details page.

Work Order Postings

Complaint	POT HOLE - POT HOLE OR CRACK IN ROAD
Cause	QA-CRACK - QA CRACK FAILURE
WAC	17 - REPAIRED
Correction	REPAIRED
Task	CNTASK001 - TASK 001 - SUPPORTS ALL ASSET CATEGORIES

Edit

Labor

New Task

Parts

Ctrl

CNTASK001 - TASK 001 - SUPPORTS ALL ASSET CATEGORIES

Remaining Hours: -1.00

WAC: 17

Labor:

	Start	End	Technician	WAC	Hours	Cost	
	09/17/2015 02:05 PM	09/17/2015 03:05 PM	MOLLY-EMP - MOLLY	17 - REPAIRED	1.00	31.20	
Total:					1.00	31.20	

Post Labor to a Task Not on a Service Request

1. Click the **Labor** button in the Tasks not on Service Request section.



The Post Work Order Labor pop-in (without service request header information) allows you to post labor on a non-service request task. If there is only one non-service request task, that task defaults on the pop-in.

Post Work Order Labor

Add Labor Posting - Line 1

Technician	MOLLY-EMP	MOLLY
Task ID		Lookup
WAC		...
Start		Help
Hours		
From Marker		... From Offset
To Marker		... To Offset
Time Code	DI	... STANDARD DIRECT
Account ID		...
Repair Reason		...
Comments		
Undo	Add	

☐ No Parts Needed

End

2. Follow the steps in the [post labor to the service request](#) procedure above (in the [Create a New Service Request and \(Optional\) Post Labor](#) section) to complete the necessary information and post labor to the task not on the service request.

The labor shows posted to the task not on the service request.

Tasks not on Service Requests

Parts

Cml

New Task

CNTASK001 - TASK 001 - SUPPORTS ALL ASSET CATEGORIES

Remaining Hours: -3.75

WAC: 17

Labor:

	Start	End	Technician	WAC	Hours	Cost	
	09/17/2015 12:15 PM	09/17/2015 03:00 PM	MOLLY-EMP - MOLLY	17 - REPAIRED	2.75	85.80	
					Total:	2.75	85.80

Edit Work Order Labor Pop-in

➡ Once labor has been posted to a work order, click the **+** to review the posted information.

×

Edit Work Order Labor

Service Request

Symptom

BW1 - BROKEN WINDOW SYMPTOM 1

Complaint

BROKEN WINDOW > BROKEN WINDOW SYMPTOM 1

Fail / Cause Code

FC1-1

...

ELECTRICAL - SHORTED FUSE

Cause

Correction

Edit Labor Posting

Service Request ID

GI-PH-2020-0001-456

Task ID

001-000

...

Lookup

Total number of times task performed

22

WAC

...

Date

12/05/2020

Hours

2.00

Position

BK

...

Time Code

STAND/

...

Classification

...

Account ID

...

Comments

Cancel

Save

Full Reversal

Labor History

Posted By	Date	Time Code	Service Request ID	Task ID	WAC	Hours
	12/05/2020	STANDARD	GI-PH-2020-0001-456	001-000 - ELECTRICAL - CHANGE LIGHT BULBS		2.00

To edit posted labor:

1. Click the **Edit**  icon next to the line to edit.

Tasks not on Service Requests

Labor

Parts

Cml

New Task

006 - BRAKES

Remaining Hours: -0.32

WAC: 10

Labor:

Date	Technician	WAC	Hours
05/07/2015	MOLLY-EMP - MOLLY	10 - INSPECTED	1.00 
	MOLLY-EMP	D1	006 10 1.00
07/23/2014	MOLLY-EMP - MOLLY		8.32 
07/19/2014	MOLLY-EMP - MOLLY		1.00 
Total:			10.32

The Edit Work Order Labor pop-in displays.

Edit Work Order Labor

Edit Labor Posting

Service Request ID: PM SERVICE A

Task ID:

WAC:

Start: 08/10/2016 10:12 AM

End: 08/10/2016 10:28 AM

Hours: 0.27

Time Code: REG REGULAR

Account ID: 1000.111101.00001.000.0000 TEST

Comments:

Labor History

Posted By	Start	End	Date	Time Code	Service Request ID	Task ID	WAC	Hours
SRV	08/10/2016 10:12 AM	08/10/2016 10:28 AM	08/10/2016	REG		A		0.27

2. Edit the fields as desired and click **Save** to save the entry.

 The **Service Request ID** drop-down choices depend on your Work Order Location settings.

 The technician only needs to enable the **No Parts Needed** box once per task to which it applies. When technicians flag **No Parts Needed** on the task, it is not necessary to go into each posting to set the flag. Likewise, if the flag is set when posting labor, it is automatically set on the task. If there are multiple postings under a single task and one posting is flagged, the task is automatically flagged.

Edit Work Order Labor

Edit Labor Posting

Service Request ID:

Task ID: 006

WAC: 10

Date: 05/07/2015

Hours: 2.00

Time Code: DI

Account ID: A2

Comments: ADDED COMMENT

Labor History

Posted By	Date	Time Code	Service Request ID	Task ID	WAC	Hours
MOLLYT	05/07/2015	DI		006	10	1.00

The Work Order Details page displays with the new labor hours.

Tasks not on Service Requests

Labor Parts Cml New Task

006 - BRAKES Remaining Hours: -1.32 WAC: 10

Date	Technician	WAC	Hours
05/07/2015	MOLLY-EMP - MOLLY	10 - INSPECTED	2.00
07/23/2014	MOLLY-EMP - MOLLY		8.32
07/19/2014	MOLLY-EMP - MOLLY		1.00
Total:			11.32

- Click the **+** to review the details of the edited labor hours.

Tasks not on Service Requests

Labor

Parts

Cml

New Task

006 - BRAKES

Remaining Hours: -1.32

WAC: 10

Labor:

Date	Technician	WAC	Hours				
05/07/2015	MOLLY-EMP - MOLLY	10 - INSPECTED	2.00				
Technician	Start	End	Time Code	Service Request ID	Task ID	WAC	Hours
MOLLY-EMP			D1		006	10	2.00
MOLLY-EMP			D1		006	10	-1.00
MOLLY-EMP			D1		006	10	1.00
07/23/2014	MOLLY-EMP - MOLLY						8.32
07/19/2014	MOLLY-EMP - MOLLY						1.00
Total:							11.32

To complete a full reversal of the labor hours posted:

- Click the **Edit** icon.
- Click the Full Reversal button on the Edit Work Order Labor pop-in.

Edit Work Order Labor

Edit Labor Posting
Service Request ID:
Task ID: 006
WAC: 10
Date: 05/07/2015
Hours: 2.00
Time Code: D1
Account ID: A2
Comments: ADDED COMMENT

☐ No Parts Needed

Labor History

Posted By	Date	Time Code	Service Request ID	Task ID	WAC	Hours
MOLLYT	05/07/2015	D1		006	10	2.00
MOLLYT	05/07/2015	D1		006	10	-1.00
MOLLYT	05/07/2015	D1		006	10	1.00

The Work Order Details page displays with zero hours posted for the task.

Tasks not on Service Requests							Labor		Parts		Cml		New Task		
A - PM-A							WAC: 06		 						
Labor:															
	Start	End	Technician		WAC		Hours	Cost							
	09/20/2011 06:30	09/20/2011 11:00	1000-11 - MARY SMITH		06 - INSPECT		0.00	0.00							
	08/18/2010 11:25	08/23/2010 12:35	1000-11 - MARY SMITH				121.17	6038.50							
							Total:		121.17		6038.50				

- Click the **+** to review the details of the reversal.

Tasks not on Service Requests										Labor		Parts		Cml		New Task	
A - PM-A										WAC: 06							
Labor:																	
		Start	End	Technician			WAC		Hours	Cost							
		09/20/2011 06:30	09/20/2011 11:00	1000-11 - MARY SMITH			06 - INSPECT		0.00	0.00							
		Technician	Start	End	Time Code	Service Request ID	Task ID	WAC	Hours								
		1000-11	09/20/2011 06:30	09/20/2011 11:00	RT		A	06	-4.50								
		1000-11	09/20/2011 05:45	09/20/2011 11:00	RT		A	06	-5.25								
		1000-11	09/20/2011 06:30	09/20/2011 11:00	RT		A	06	4.50								
		1000-11	09/20/2011 05:45	09/20/2011 11:00	RT		A	06	5.25								
		08/18/2010 11:25	08/23/2010 12:35	1000-11 - MARY SMITH					121.17	6038.50							
Total:									121.17	6038.50							

Post Work Order Parts Pop-in

When you click the **Parts** or **Part Actions** buttons on the Main Technician page's Current Job tab, the Work Order Main page, or the Work Order Details page, the Post Work Order Parts pop-in displays.

The following two screenshots provide samples of the Post Work Order Parts pop-in when posting parts to a service request and posting parts to a PM task not on a service request.

The screenshot below shows the pop-in after clicking the **Parts** button in the service requests section of the Work Order Details page (with the service request header information on top and the service request defaulted in the Service Request drop-down box).

Post Work Order Parts

Complaint (Symptom): QA-SYMP-CRACK - QA SYMPTOM FOR CRACK

Cause: QA-CRACK - QA CRACK FAILURE

Correction: FIX SHUTOFF

Task: 001 - ELECTRICAL SYSTEM

Basic Info | **Standard Parts**

Add Parts Posting - Line 1: ☐ Issue ☒ Request

Task ID: 001 ... Lookup: ELECTRICAL SYSTEM

Stock Location: ACA ... ASSET CENTRAL ADMINISTRATION

Part: ... Lookup

Manuf Part No: ...

Qty: ... Qty on Hand: ...

Date Required: ...

Vendor ID: ...

Account ID: 1000.111101.00001.000.00000 ... TEST

Comments: ...

Service Request: QA-SYMP-CRACK - QA SYMPTOM FOR CRACK

WAC: ...

Bin: ...

Description: ...

Manufacturer: ...

Unit Price: ... Core Value: ...

NFI: ... Est Unit Cost: ...

Fail/Cause ID: ...

Priority ID: ...

Issue Together: ☐

Undo Add

Pending Parts Postings

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
------	---------	---------	-------------	-----	------------	--------	--------

Cancel Save History

Whereas, the following screenshot shows the pop-in that appears after clicking **Parts** for a task not on a service request. This screenshot will be used to illustrate issuing/requesting parts below.

 The Standard Parts tab highlights when standard parts exist for the class/task. See the [Standard Parts Tab - Request/Issue Parts](#) section below for more information about standard parts.

It is on the Post Work Order Parts pop-in where you may request parts to create a parts request and issue parts to post the parts from inventory to the work order. Or, in the case of NFI parts, you may issue NFI parts to post parts NOT from inventory to the work order. The Serial Number column only displays if a part has a serial number.

Basic Info Tab – Issue/Request Parts

To issue or request parts on the Basic Info tab of the Post Work Order Parts pop-in, follow the steps below.

 Radio buttons are only visible if the user can issue and request parts. Otherwise, the action will default to the setting the user has available, either Request or Issue, and the radio buttons will not be visible.

1. Select the desired radio button (**Issue** or **Request**).

- The **Issue** radio button is visible if the user is in a group that can do Part issues, based on the setting: Allow users in this group to issue parts.

- The **Request** radio button is visible if the user is in a group that can do Part requests, based on the setting: Allow users in this group to request parts.

2. Complete the Add Parts Posting – Line 1 fields based on whether you are issuing or requesting a part.

 Note: The fields displayed vary depending on issue/request.

3. The **Service Request** drop-down displays if a service request is associated with the work order. To link the part request to the service request, select a service request from the drop-down.

4. **Task ID** may be entered or selected with the **Select** icon  or the **Lookup** button.

 Note: If only one task exists for the service request or work order, that task will default in the field.

- Click the **Select** icon  to limit the selection to those tasks that are on the service request or work order.
- Click the **Lookup** button to open the **Choose a Task** pop-in. Select a tab and the desired task. It automatically loads the task in the **Task ID** field.

5. **WAC** is hidden for Part Rebuilds.

6. The **Stock Location** defaults as the last-entered location if previous pending postings exist or as the current Work Order Location's stock location. (It is driven by the Employee ID's supported locations that are parts locations.) Enter or select a different one if desired.
7. The **Bin** choice-list is dynamic based on Stock Location and Part ID and lists all bins for that location/part.

To select the part ID from the pop-in:

Enter or select the **Part** or click the **Lookup** button to find and select the Part ID from the **Part ID Lookup** pop-in by following the steps below.

1. The **Stock Location** is a drop-down list of the user's supported stock locations. The **Stock Location** defaults. If desired, select a different stock location from the drop-down box.

 **Note:** Selecting a different location only affects the search, and will not be set as the stock location on the Post Work Order Parts page.

2. In the **Search by Text** area of the pop-in, you may search using **Part IDs** or **Descriptions**. To search for parts by entering a Part ID, select a choice from the drop-down box to assist in the part number search (i.e., **equals**, **starts with**, **ends with** or **contains**). Enter the number in the field. The default for the Part ID search option drop-down list depends on portal settings. This 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
3. To execute the filter, click on the **Search** button. A list of parts with the desired number, that are stored at the location, is displayed below in the Please Choose a Part ID list.

4. To search for parts by entering a **Description**, select a choice from the drop-down box to assist in the description search (i.e., equals, starts with, ends with or contains). Enter the description in the field. To execute the filter, click on the **Search** button. A list of parts with the matching description is displayed below in Please Choose a Part ID list.

 If you have access to Enterprise Portal Part Location screen, the Part ID is a link to the Part Location screen.

Please choose a Part ID - Parts found: 2

Part ID	Suf	Description
P-1000	0	OIL FILTER; OIL FILTER
P-1000	98	OIL FILTER; OIL FILTER

 If you have Documoto™ set up AND your work order equipment's equipment type has a document ID defined, then when in the Part ID Lookup pop-in, a **zoom**  icon displays to the left of the parts in the search results. Clicking the **zoom icon** opens up Documoto™, attempts to search for that part, and brings the user straight to the part, if possible.

Please choose a Part ID - Parts found: 73

Part ID	Suf	Description
 04653-20090-71	0	KIT; KIT -
 04653-20100-71	0	KIT; KIT- PACKING TOYOTA
 11253-76001-71	0	GASKET; GASKET - LIFTER

5. In the **Search by Defined Lists** area of the pop-in, you may click the **Where Used**, **Lookup**, **Class/Task**, or **Task Parts** buttons to see the list of parts.

- **Where Used:** This button provides a list of parts previously issued to the specific Work Order equipment's equipment type. The list is displayed in the Please Choose a Part ID section.



Note: This button is not available on Part Rebuilds as it only pertains to equipment.

- **Class/Task:** Depending upon your configuration, the **Class/Task** parts list may be automatically populated in the Please Choose a Part ID section. When other lookups are performed, click this button to return to the class/task parts list.



Note: This button is not available on Part Rebuilds as it only pertains to equipment. On production runs (whether on a part or an asset), there is a **Stage/Task** button instead of the **Class/Task** button.

- **Task Parts:** This button shows parts that have been associated with a task.
 - You may also enter or select a **Task ID** or click the **Lookup** button to select a task from the Choose a Task pop-in as mentioned above. You may also click the **Task Parts** button to see a list of all the parts that have the associated selected task (on the Repair tab in the GUI or Enterprise Portal).
6. After selecting the desired part from the resulting parts list displayed, the number and suffix are loaded into the fields on the Post Work Order Parts pop-in. The fields shown will be different depending on whether you are issuing or requesting a part.

Fields that show for both Issue and Request:

- **Task ID:** Includes text field, choice-list, and task lookup button. Represents the task you are working on that relates to this part action (issue or request).
- **Stock Location:** Parts Location you are requesting or issuing part from.
- **Part:** Part ID you are requesting. To specify a part, you must have both an ID and a suffix at the end. Suffix is used to determine the kind of variant of the part. What each suffix means can be found on the Parts-Setup-Options screen.

	Parts options
General	Part Status Tracking ☐ Enable part status tracking Part suffix used for part status New Rebuilt Used Core-awaiting warranty Core-awaiting rebuild Scrapped
Issues	
Part Status Tracking	
Stock Promotion	
EQ	
Messaging	
Labels	

- **Qty:** Defaults to 1.
- **Qty Available:** This shows if part is available at stock location without giving qty. The portal setting Display parts quantity on hand as Number of parts (default) Available (yes/no) controls if this is shown or the field for Qty On Hand.
- **Qty On Hand:** The number of parts available at the stock location. The portal setting Display parts quantity on hand as Number of parts (default) or Available (yes/no) controls if this is shown or Qty Available.
- **From Marker/Offset and To Marker/Offset:** These fields shows for linear work orders.
- **Account ID:** The identifier of the account.
- **Add File:** Click this button to add a file to the posting.
- **Note:** Enter any notes to be included with the posting.
- **Service Request**
- **WAC:** The work accomplished code (WAC).
- **Bin:** The stock location identifier for what shelf or rack this part is on. This field lets you specify what bin you are issuing from.
- **Description:** Defaults per screen or from the Part ID lookup.
- **Unit/Price:** Defaults based on Part ID and Stock Location.
- **Installed Serial Number and Removed Serial Number:** This shows for serialized parts. Installed and removed serial numbers are required when issuing serialized parts.

Installed Serial Number: If the part is a serialized part, specify which number you are.

Removed Serial Number: If you are replacing a serialized part, specify what serial numbers are being removed.



When issuing a part to a work order, warranty coverage is tracked down to the serial level for serialized parts. For example, a warranty claim is generated when a removed serialized part is covered under warranty.

- **Core Value:** Defaults per screen.
- **NFI:** This is only visible if the user is in a group that can do NFI issues, based on the Allow users in this group to issue NFI (not from inventory) parts setting. Part ID and suffix are required for NFI parts.
- **Fail/Cause ID:** Code to indicate why the original part failed. Note that this is filtered based on what failure codes map to the work order's asset's category (or support all categories).
- **Comments:** Add comments.

Fields that show only for Issue:

- **Issue Date:** This shows for Issue only. When a part is issued to a work order, the issue date defaults to the date and time of the latest labor or commercial transaction against the same task ID, if available. Otherwise, the date defaults to today. Also if any employee is capturing labor on the task, the issue date defaults to today instead of last posting date.
- **Warranty Vendor:** This shows for Issue only. The vendor for the warranty.
- **Repair Reason:** This shows for issue only. The reason for the repair.

Fields that show only for Request:

- **Date Requested:** When a part is issued to a work order, the issue date defaults to the date and time of the latest labor or commercial transaction against the same task ID, if available. Otherwise, the date defaults to today. Also if any employee is capturing labor on the task, the issue date defaults to today instead of last posting date.
- **Vendor ID:** The vendor for the warranty.
- **Est. Unit Cost:** The estimated cost of each unit.
- **Position:** Use this field to specify where a part is being installed.
- **Manufacturer:** Name of part manufacturer. Will show based on portal setting (see below).

- **Manufacturer Part No:** The number of the manufacturer uses for part. Will show based on portal setting (see below).
 - **Issue Together:** Check this box if you need all the parts issued at the same time. If this box is checked, and not all parts are ready, the Parts Room Clerk will not notify the technician until all parts in pending status are marked as Notify (ready for pickup).
 - **Priority ID** shows the priority for the part request. Only priorities that have the option of Requests and stock transfers function on the Priority Codes screen, Functions tab will display.
7. Click the **Add** button to add the part (issue/request) to the Pending Parts Postings on the bottom of the pop-in.



The **Undo** button resets the fields to their default values.

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1	C	CN-REB-ENGINE-001-0	PART: REBUILDABLE ENGINE	1.00	35432.0800	CNSHOP001	REQUEST

The part posting shows in the Pending Parts Postings section as a REQUEST.

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1	C	CN-REB-ENGINE-001-0	PART: REBUILDABLE ENGINE	1.00	35432.0800	CNSHOP001	REQUEST

8. Click the **Edit**  icon to update a pending part posting.

Post Work Order Parts

Basic Info **Standard Parts**

Parts Posting - Line 2 ☐ Issue ☒ Request Service Request: A - AIR SUPPLY SYSTEM

ID: C C WAC:

Location: CNLOC1 DEFAULT PARTS LOCATION Bin:

Qty on Hand: Description:

Required: Unit Price: Core Value:

or ID: NFI: ☐ Est Unit Cost:

Fail/Cause ID:

Pending Parts Postings

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1	C	CN-REB-ENGINE-001-0	PART: REBUILDABLE ENGINE	1.00	35432.0800	CNSHOP001	REQUEST

The pending part posting line turns orange. Upon updating the information, click the Update button.

Post Work Order Parts

Basic Info **Standard Parts**

Edit Parts Posting - Line 1 ☐ Issue ☒ Request Service Request: A - AIR SUPPLY SYSTEM

Task ID: C C WAC: 10 ADJUSTED

Stock Location: CNLOC1 DEFAULT PARTS LOCATION Bin:

Part: CN-REB-ENGINE-001-0 Description: PART: REBUILDABLE ENGINE

Qty: 1.00 Qty on Hand: 1.00 Unit Price: 35432.0800 Core Value:

Position: 4 4

Installed Serial No: CN-DDS60-005 Removed Serial No:

Date Required: 01/25/2011 NFI: ☐ Est Unit Cost:

Vendor ID: CNSHOP001 COMMERCIAL WORK VENDOR Fail/Cause ID:

Comments:

Pending Parts Postings

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1	C	CN-REB-ENGINE-001-0	PART: REBUILDABLE ENGINE	1.00	35432.0800	CNSHOP001	REQUEST

The information is updated for the line item in the Pending Parts Postings section and the Edit Parts Posting – Line 2 area shows.

Post Work Order Parts

Basic Info **Standard Parts**

Add Parts Posting - Line 2 ☐ Issue ☒ Request Service Request: A - AIR SUPPLY SYSTEM

Task ID: C C WAC:

Stock Location: CNLOC1 DEFAULT PARTS LOCATION Bin:

Part: Description:

Qty: Qty on Hand:

Date Required: Unit Price: Core Value:

Vendor ID: NFI: ☐ Est Unit Cost:

Fail/Cause ID:

Comments:

Pending Parts Postings

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1	C	CN-REB-ENGINE-001-0	PART: REBUILDABLE ENGINE	1.00	35432.0800	CNSHOP001	REQUEST

9. Continue adding parts issues/requests to the pending parts postings list.

Post Work Order Parts

Basic Info **Standard Parts**

Add Parts Posting - Line 4 ☒ Issue ☐ Request Service Request: A - AIR SUPPLY SYSTEM

Task ID: C WAC:

Stock Location: CNLOC1 Bin:

Part: Description:

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

Issue Date: 01/18/2011 NFI: ☐

Warranty Vendor: FailCause ID:

Account ID: ACCT1 ACCT1 NAME: Repair Reason:

Comments:

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1	C	CN-REB-ENGINE-001-0	PART: REBUILDABLE ENGINE	1.00	35432.0800	CNSHOP001	REQUEST
2	C	CNFIFO-SERIALPART001-1	PART: SERIALIZED COMPONENT PART - FIFO	1.00	302.6300	CNSHOP001	ISSUE
3	C	CNPART-FIFO-001-0	PART: REPAIRABLE PART	1.00	125.0000	CNSHOP001	ISSUE

10. Click the **Save** button to save your issues/requests.

Post Work Order Parts

Basic Info **Standard Parts**

Add Parts Posting - Line 4 ☒ Issue ☐ Request Service Request: A - AIR SUPPLY SYSTEM

Task ID: C WAC:

Stock Location: CNLOC1 Bin:

Part: Description:

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

Issue Date: 01/18/2011 NFI: ☐

Warranty Vendor: FailCause ID:

Account ID: ACCT1 ACCT1 NAME: Repair Reason:

Comments:

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1	C	CN-REB-ENGINE-001-0	PART: REBUILDABLE ENGINE	1.00	35432.0800	CNSHOP001	REQUEST
2	C	CNFIFO-SERIALPART001-1	PART: SERIALIZED COMPONENT PART - FIFO	1.00	302.6300	CNSHOP001	ISSUE
3	C	CNPART-FIFO-001-0	PART: REPAIRABLE PART	1.00	125.0000	CNSHOP001	ISSUE

Clicking the **Cancel** button cancels your unsaved changes. Clicking the **IPC** button takes you to the Illustrated Parts Catalog (if configured) and clicking the **History** button takes you to the Parts History pop-in to view part action history. A highlighted **History** button indicates that part actions were previously performed. Please refer to the [Parts History Pop-in](#) section details about this pop-in.

Part requests and issues are processed in batch. Each failed transaction, if any, is reported to the technician. The technician then has the opportunity to correct (modify), or remove the offending cart item. Refer to the [Remove Pending Part Issues/Requests](#) section for additional details.

Standard Parts Tab – Request/Issue Standard Parts

The Standard Parts tab is visible for equipment work orders (linear and non-linear) and is hidden for Part Rebuild work orders. If parts are on the list, the tab is highlighted yellow.

To request parts using the Standard Parts tab of the Post Work Order Parts pop:

1. Select the **Standard Parts** tab of the Post Work Order Parts pop-in.

The screenshot shows the 'Post Work Order Parts' window. The 'Standard Parts' tab is highlighted in yellow and circled in red. The window contains the following elements:

- Issue Date:** Radio buttons for 'Default' and 'Custom'. The 'Default' option is selected, showing the date '08/16/2016 02:06 PM'.
- Stock Location:** A dropdown menu showing 'ACA' and a button to view 'ASSET CENTRAL ADMINISTRATION'.
- WAC:** A text input field.
- Table:** A table with columns: Notification, Task ID, Part ID, Manuf Part No, Manufacturer, Description, Qty, and On Hand. A single row is visible with the following data:

Notification	Task ID	Part ID	Manuf Part No	Manufacturer	Description	Qty	On Hand
☐	A	EAR PLUGS-0			SAFETY; DISPOSABLE FOAM EARPLUGS	2	Y
- Buttons:** 'Add as REQUEST' and 'Add as ISSUE' buttons are located below the table. At the bottom of the window are 'Cancel', 'Save', and 'History' buttons.

2. Complete the following fields:
 - Issue Date defaults to the last-entered date if previous pending postings exist or else defaults to today's date. You may select a custom date from the calendar.
 - Stock Location defaults to the last-entered location if previous pending postings exist or else defaults to the current work order location's stock location. The choice-list is consistent with the Parts Cart Item Edit page.
 - WAC Enter or select the WAC.
3. Select the parts to request and click the **Add as REQUEST** button.

The parts show in the Pending Parts Postings list below as a Request action.

Pending Parts Postings								
	Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
☒	1	A	EAR PLUGS-0	SAFETY; DISPOSABLE FOAM EARPLUGS	2.00	0.0000		REQUEST

- Click the **Save** button.

When the requested part is a warrantable part, the following dialog displays to remind you to save the old part for warranty. Click the **OK** button to continue.

Message from webpage

Part EAR PLUGS-0 replaced under warranty -- Keep old part for claim purposes

You are returned to the Main Technician Portal page. The part request shows on the Work Order Details page as seen by the Pending Part Request icon in the screenshot below.

WAC:

To issue parts using the Standard Parts tab of the Post Work Order Parts pop-in:

- Select the **Standard Parts** tab of the Post Work Order Parts pop-in.

Post Work Order Parts

Basic Info

Standard Parts

Issue Date ☒ Default ☐ Custom 08/16/2016 02:06 PM

Stock Location ACA ASSET CENTRAL ADMINISTRATION

WAC

	Notification	Task ID	Part ID	Manuf Part No	Manufacturer	Description	Qty	On Hand
☐		A	EAR PLUGS-0			SAFETY; DISPOSABLE FOAM EARPLUGS	2	Y

<
>

- Select the parts to issue and click the **Add as ISSUE** button.

The part displays in the Pending Parts Postings section as an ISSUE action.

Post Work Order Parts

Basic Info | **Standard Parts**

Issue Date: ☒ Default ☐ Custom 08/16/2016 03:19 PM

Stock Location: ACA ASSET CENTRAL ADMINISTRATION

WAC:

	Notification	Task ID	Part ID	Manuf Part No	Manufacturer	Description	Qty	On Hand
☐		A	EAR PLUGS-0			SAFETY; DISPOSABLE FOAM EARPLUGS	2	Y

Pending Parts Postings

	Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
	1	A	EAR PLUGS-0	SAFETY; DISPOSABLE FOAM EARPLUGS	2.00	0.0000		ISSUE

- Click the **Save** button.

You may also click the red **X** to cancel the part issue or click the **Edit** icon (to the far right of the pop-in) to edit the pending part issue.

*If all the information is complete for the part, you are returned to the Work Order Main page. Otherwise, you are returned to the Basic Info tab and the pending part posting line is highlighted orange indicating that you need to complete the basic information for the issued part. After completing the basic information, click **Update** to complete the part issue.*

You are returned to the Work Order Main page. On the Work Order Details page, the Return Part icon shows next to issued parts as shown in the screenshot below.

Qty	Unit Price	Total Cost	
2.00	0.0000	0.00	
Total:		0.00	

Remove Pending Part Issues/Requests

- To remove a pending part issue/request line from the list, click the red X and click **OK** on the subsequent dialog box to remove the line from the list.

Post Work Order Parts

Basic Info | **Standard Parts**

Issue Date: ☐ Default ☐ Custom 08/16/2016 03:33 PM

Stock Location: ACA ASSET CENTRAL ADMINISTRATION

WAC:

Notification	Task ID	Part ID	Manuf Part No	Manufacturer	Description	Qty	On Hand
☐	A	EAR PLUGS-0			SAFETY; DISPOSABLE FOAM EARPLUGS	2	Y

Buttons: Add as REQUEST, Add as ISSUE

Pending Parts Postings

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1	A	EAR PLUGS-0	SAFETY; DISPOSABLE FOAM EARPLUGS	2.00	0.0000		REQUEST

Buttons: Cancel, Save, History

The line item shows with a strikethrough to indicate its removal.

Pending Parts Postings							
Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1	C	CN-REB-ENGINE-001-0	PART: REBUILDABLE ENGINE	1.00	35432.0800	CNSHOP001	REQUEST
2	E	CN-FFO-SERIALPART001-0	PART: SERIALIZED COMPONENT PART-FFO	1.00	302.6300	CNSHOP001	ISSUE
3	C	CNPART-FIFO-001-0	PART: REPAIRABLE PART	1.00	125.0000	CNSHOP001	ISSUE

Click the red X again to cancel the deletion.

- Click **Save** to post the remaining issues or returns to the work order (or service request).

Any saved issue or return shows on the Work Order Details page as shown on the sample screenshot below and discussed in the next section.

Pending Part Requests and Return Part Icons

The Pending Part Request icon takes you to the Part Requests pop-in to view pending part requests.

- Click the Pending Part Request icon.

Tasks not on Service Requests Labor Parts Cml New Task

A - PM SERVICE A Remaining Hours: 13.52 WAC: 02  PM Checklist Report

Labor:

Date	Technician	WAC	Hours	Cost
08/10/2016	SRV - SARAH VICKERS		0.27	5.89
Total:			0.27	5.89

The Parts History Parts Requested pop-in displays.

Parts History

Parts Requested

Date	Part ID	Manuf Part No	Manufacturer	Description	Qty	Task	Priority ID	Action	Request
03/09/2016 02:46 PM	14660-0			BOX-JUNCTION; BOX, JUNCTION, SWT/MACH, WAYSIDE, 16X13X6, UNION SWITCH & S	1	001 - ELECTRICAL SYSTEM		Cancel	478418

Cancel

 The pending part requests and partially received part requests show in the Parts Request pop-in.

- Click **Cancel** to cancel the request.

The following dialog box displays.

- Click **OK** to cancel the part request.

Message from webpage

 Cancel part request?

Part: 14660-0: BOX-JUNCTION; BOX, JUNCTION, SWT/MACH, WAYSIDE, 16X13X6, UNION SWITCH & S

Qty: 1.00

OK Cancel

Closing the pop-in returns you to the Postings Page.

The Return Part icon  allows you to return a part. To return a part:

- Click the **Return Part** icon.

Tasks not on Service Requests									
A - PM SERVICE A				Remaining Hours: 13.52		WAC: 02			
Labor:									
Date	Technician	WAC	Hours	Cost					
08/10/2016	SRV - SARAH VICKERS		0.27	5.89					
Total:			0.27	5.89					
Parts:									
Date	Part ID	Manuf Part No	Manufacturer	Description	WAC	Qty	Unit Price	Total Cost	
08/16/2016	EAR PLUGS-0			SAFETY; DISPOSABLE FOAM EARPLUGS	02 - ADJUSTED	2.00	0.0000	0.00	
Total:							0.00		

A warning dialog box may display. If it does, click **OK**.

The Return issued part pop-in displays.

Return issued part			
Task	A - PM SERVICE A		
Part	EAR PLUGS-0: SAFETY; DISPOSABLE FOAM EARPLUGS		
WAC	02 - ADJUSTED	Position	
Quantity Issued	2.00	Quantity Returned	0
NFI	N	Unit Price	\$0.0000
Issue Location	ACA - ASSET CENTRAL ADMINISTRATION	Employee	SRV - SARAH VICKERS
Comments			
Qty to return	2.00		
Reason			
Date	08/16/2016 03:32 PM		
Cancel		Submit Request	

- Complete the **Qty to return** and **Reason** fields, and click **Submit Request**.



If approval is required for part returns (as configured in the portal settings), the returned part information will show after the supervisor has approved the return.

Post Work Order Commercial Work Pop-In

Commercial work can be posted to a service request or task or it can be requested from this pop-in. You can view commercial work history by clicking the **History** button on this page.

1. On the Work Order Details page, click the **Cml** (commercial) button (in the Service Request section or the Tasks not on Service Requests section) or click the **Commercial Work** button on the Work Order Main page.

Work Order Postings

Equipment Usage

Equipment ID	Usage Date	Operator ID	Task ID	Account ID	Hours Used	Cost
SRV-CAR1 - BLAZIN FIRE	03/09/2016	SRV - SARAH VICKERS	001 - ELECTRICAL SYSTEM	1000.111101.00001.000.00000 - TEST	2.00	0.00

Complaint

ANOTHER-OIL - ANOTHER OIL

Edit

Labor

Cause

QA-CRACK - QA CRACK FAILURE

New Task

Parts

Cml

CNTASK030 - CN REPAIR GROUP - SUPPORTS ALL ASSET CATEGORIES - TASK 030

Remaining Hours: 0.00

WAC:

CNTASK031 - CN REPAIR GROUP - SUPPORTS ALL ASSET CATEGORIES - TASK 031

Remaining Hours: 0.00

WAC:

CNTASK032 - CN REPAIR GROUP - SUPPORTS ALL ASSET CATEGORIES - TASK 032

Remaining Hours: 0.00

WAC:

Actions

Main Page	Start Delay	View/Edit Detail
Finish Work Order	Part Actions	
Equipment History	Test Results	Related Files
Messages	Print Work Order	Component Warranty
Commercial Work	Postings	Relationships

After clicking one of these commercial buttons, the **Post Work Order Commercial Work** pop-in displays.

Post Work Order Commercial Work							
Complaint (Symptom)	SYMP-CRACK - SYMPTOM FOR CRACK						
Cause	CRACK FAILURE						
Correction	FIX SHUTOFF						
Task	001 - ELECTRICAL SYSTEM						
Add Commercial Posting - Line 1							
Service Request ID	Lookup ☐ Post ☐ Request ☐ Reversal						
Task ID	001 Lookup ELECTRICAL SYSTEM						
WAC							
Vendor ID							
Date	08/20/2019						
Vendor Contract ID							
Labor Cost	\$ Taxable? ☐ Labor Hours						
Parts Cost	\$ Taxable? ☐						
Misc Cost	\$ Taxable? ☐						
Vendor Invoice	Invoice Date						
Account ID	SRV ACCOUNT TEST						
Fail/Cause ID							
Part ID	-						
Quantity Issued							
Repair Reason	J OTHER						
Comments							
Undo Add							
Pending Commercial Work							
Line	Task ID	Date	Vendor	Labor Cost	Parts Cost	Misc Cost	Action
Cancel Save History							

2. Select the **Post** or **Request** radio button.

*The fields required for fill-in will display based on the **Post** or **Request** selection.*

3. In the Add Commercial Posting – Line 1 area, complete the following fields:

- **Service Request ID** drop-down list
- **Task ID** defaults to the last task used if a previous pending row exists or it defaults to the task if only one exists on the service request or work order. Otherwise, it is blank. Please refer to the Basic Info Tab – Issue/Request Parts section above for information about the Lookup button.
- **WAC** is hidden for part rebuild work orders.
- **Reversal**
- **No Parts Needed:** The technician only needs to enable the No Parts Needed box once per task to which it applies. When technicians flag No Parts Needed on the task, it is not necessary to go into each posting to set the flag. Likewise, if the flag is set when posting labor, it is automatically set on the task. If there are multiple postings under a single task and one posting is flagged, the task is automatically flagged.

- **Vendor ID** defaults to the last vendor entered, if a previous pending line exists.
 - **Related Vendors:** Click this button to see a list of task location and work order/task assigned vendors.
 - **All Vendors:** Click this to see a list of all vendors.
 - If the Vendor Chooser option is enabled, clicking the chooser button opens the Vendor Chooser pop-in. Here, you can add new filters to narrow down the list by typing filter searches into the **Vendor Name Contains**, **Address Contains**, **Vendor ID**, and **Task ID** fields, and clicking **Apply Filter**.

Vendor Chooser

Filter

Vendor Name Contains

Address Contains

Vendor ID

Task ID

Apply Filter Clear Filter

008264900-WATCHUNG 46035-9194

020699924-ATLANTA 76099-9938

058600542-COLLEGE PARK 13005-8445

059422187-ATLANTA 64108-9688

0600057166 MARIETTA 54038 9307

Page 1 of 945 Next

Vendor Name Contains: This searches the Vendor Name field for the item.

Address Contains: This searches the Address information for the vendor entry.

Vendor ID: This limits the vendor ID to the exact characters entered. You may use the % wildcard for partial entries.

Task ID: This limits the task ID to the exact characters entered. You may use the % wildcard for partial entries. This search is based on the Vendor ID column of the Tasks – Primary Information screen on the Locations tab.

- **Date** defaults to the last date entered, if a previous pending line exists. You may select a date from the picker calendar icon.
- **Vendor Contract ID:** The ID of the vendor contract
- **From Marker/Offset** and **To Marker/Offset** shows for linear work orders.
- **Labor Cost** and **Taxable?** checkboxes default per screen.
- **Labor Hours**
- **Parts Cost** and **Taxable?** checkboxes default per screen.
- **Misc Cost** and **Taxable?** checkboxes default per screen.
- **Total Tax Amount** displays only with request.
- **From Marker** and **To Marker:** Displays only with linear assets.
- **From Offset** and **To Offset:** Displays only with linear assets.
- **Total Cost** updates as **Labor**, **Parts**, and **Misc** costs are entered.
- **Position** displays only with post.
- **Vendor Invoice** displays only with post.
- **Invoice Date** displays only with request, defaults to last date entered, if a previous pending line exists.
- **Account ID** defaults to last entered account if previous pending postings exist or else uses current work order account ID.
- **Priority ID** displays only with post.
- **Fail/Cause ID** displays only with post.
- **Part ID** displays only with post.
- **Quantity Issued**
- **Repair Reason**
- **Comments**

4. Click **Add**.

The commercial work shows in the Pending Commercial Postings section of the pop-in.

5. Refer to the [Basic Info Tab – Issue/Return Parts](#) section above for information about updating/editing the pending posting and removing the pending item.

6. Click **Save** to save the commercial work.

The Work Order Details page and if you click **History** in the Post Work Order Commercial Work pop-in show the commercial work.

Work Order Postings

Equipment Usage

Equipment ID	Usage Date	Operator ID	Task ID	Account ID	Hours Used	Cost
SRV-CAR1 - BLAZIN FIRE	03/09/2016	SRV - SARAH VICKERS	001 - ELECTRICAL SYSTEM	1000.111101.00001.000.00000 - TEST	2.00	0.00

Complaint

A - A

Edit

Labor

New Task

Parts

Cml

A - PM SERVICE A

Remaining Hours: 13.52

WAC: 02

PM Checklist Report

Commercial:

Date	Vendor	Labor Cost	Parts Cost	Misc Cost	Total Cost
08/18/2016	PARTS-MART - GENERAL VENDOR	2289.00	0.00	0.00	2289.00
Total:		2289.00	0.00	0.00	2289.00

Commercial Work History - 1-2015-5

Posted Commercial Work

Vendor ID	Task ID	WAC ID	Date	Reversal	Labor Hours	Labor Cost	Parts Cost	Misc Cost	Total
PARTS-MART - GENERAL VENDOR	A - PM SERVICE A	02	08/18/2016	N	15.00	\$ 2,289.00	\$ 0.00	\$ 0.00	\$

Showing 1 records

Pending Commercial Work

Date	Request	Task ID	Vendor ID	Date Required	Status	Action
------	---------	---------	-----------	---------------	--------	--------

Cancel

Commercial Work Reversal

The Reversal checkbox on the Post Work Order Commercial Work pop-in allows you to reverse a commercial work cost as shown in the following steps.

1. On the Post Work Order Commercial Work pop-in, check the **Reversal** checkbox, complete the fields to reverse a cost, and click the **Add** button.

Post Work Order Commercial Work

Complaint (Symptom): RPLC ANTIFREEZE - COOLING SYSTEM > OVERHEATING > RPLC ANTIFR...

Task: 000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800

Add Commercial Posting - Line 1

Service Request ID: RPLC ANTIFREEZE - CC [Post] [Request]

Task ID: 000-800 [LookUp] VEHICLE INSPECTION - SEE NOTES - TASK ID 000-80

WAC: []

Vendor ID: []

Date: 10/01/2015

Vendor Contract ID: []

Labor Cost: \$100 [Taxable?] Labor Hours: 1

Parts Cost: \$ [Taxable?]

Misc Cost: \$ [Taxable?]

Vendor Invoice: [] Invoice Date: []

Account ID: CNACCT0001 [UNIT ACCOUNT 0001]

Fail/Cause ID: []

Part ID: []

Quantity Issued: []

Repair Reason: J [OTHER]

Comments: []

[Undo] [Add]

Pending Commercial Postings

The reversal posting shows in the Pending Commercial Postings list at the bottom of the pop-in.

2. Click **Save** to save the entry.

[Undo] [Add]

Pending Commercial Postings

	Line	Task ID	Date	Vendor	Labor Cost	Parts Cost	Misc Cost	
[X]	1	000-800	10/01/2015		100.00			[Pencil]

[Cancel] [Save] [History]

The reversal shows on the Work Order Details page as a subtracted cost.

000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800

Remaining Hours: -5.03

WAC: 05

Labor:

Start	End	Technician	WAC	Hours	Cost
09/30/2015 09:52 AM	09/30/2015 09:54 AM	MOLLY-EMP - MOLLY		0.03	0.94
09/21/2015 10:05 AM	09/21/2015 03:05 PM	MOLLY-EMP - MOLLY		5.00	156.00
Total:				5.03	156.94

Parts:

Date	Part ID	Description	WAC	Qty	Unit Price	Total Cost
09/21/2015	CNPART035-0	BRAKE ASSEMBLY; BRAKE PAD/ROTOR KIT 035		1.00	134.0000	140.70
Total:						140.70

Commercial:

Date	Vendor	Labor Cost	Parts Cost	Misc Cost	Total Cost
10/01/2015	CNVENDOR003 - COMMERCIAL VENDOR 003	0.00	61.00	11.20	72.20

Date	Reversal	Labor Hours	Labor Cost	Parts Cost	Misc Cost	Total Cost
10/01/2015	Y	-1.00	-122.00	0.00	0.00	-122.00
10/01/2015	N	2.00	122.00	61.00	11.20	194.20
Total:			0.00	61.00	11.20	72.20

Commercial Work History Pop-in

Click the Pending Commercial Work  icon on the My Work Portal page to display the Commercial Work History pop-in. The pop-in shows posted and pending commercial work. Pending commercial work includes commercial requests (requests with line item type COMMERCIAL), purchase order line items tied to the work order (that are not RECEIVED, ISSUED, CANCELLED, or CLOSED), and requisition line items tied to the work order (that are not closed). To cancel a commercial request, click **Cancel**.

Commercial Work History - BSLOC1-2013-2

Posted Commercial Work

Vendor ID	Task ID	WAC ID	Date	Reversal	Labor Hours	Labor Cost	Parts Cost	Misc Cost	Total
1003-6277 - TONYA SPEAR	GNMTASK1 - GNM TASK1		05/29/2013	N	0.00	\$ 550.00	\$ 22.00	\$ 100.00	

<

Showing 1 records

Pending Commercial Work

Date	Request	Task ID	Vendor ID	Date Required	Status	Action	
04/12/2016 12:28 PM	478450	GNMTASK1 - GNM TASK1	NAPA - ABF FREIGHT SYSTEM	04/12/2016	OPEN		BSLOC

<

Showing 1 records

Cancel

The Commercial Work History pop-in includes a **Date Required** column (if one exists for the line item).

To set up columns:

1. Click and drag the columns to change their order.
2. To add or remove columns, right-click on the column header to display the table options.

Commercial Work History - BSLOC1-2013-2

Posted Commercial Work

Vendor ID	Task ID	WAC ID	Date	Reversal	Labor Hours	Labor Cost	Parts Cost	Misc Cost	Tot
1003-6277 - TONYA SPEAR	GNMTASK1 - GNM TASK1		05/29/2013	N	0.00	\$ 550.00	\$ 22.00	\$ 100.00	

Showing 1 records

Pending Commercial Work

Date	Request	Task
04/12/2016 12:28 PM	478450	GNMTASK1 - GNM

Showing 1 records

Table Options - Select Columns to Show

- ☒ Vendor ID
- ☒ Task ID
- ☒ WAC ID
- ☐ WAC Desc
- ☒ Date
- ☒ Reversal
- ☒ Labor Hours
- ☒ Labor Cost
- ☒ Parts Cost

Save as portal default

Restore portal defaults (me only)

Restore system defaults (entire portal)

Cancel OK

3. Check or uncheck the boxes to select the columns to show.
4. Click one of the red links to choose one of the following options:
 - Save as portal default
 - Restore portal defaults (me only)
 - Restore system defaults (entire portal).

A validation dialog displays to verify how you want to save the default setting.

5. Click **OK** to save the new table default setting.

11. Work Order Task Page

View Work Order Task Information

There are a few ways to see the Work Order Task page.

To open the Work Order Task page, do one of the following:

- On the Main Technician page, click the task code link on the Current Job tab.
- On the Main Technician page, click the time on task button.
- Click the task link in the Tasks section or the Service Requests/Defects section of the Work Order Main page.
- On the Work Order Details page, clicking the task link in the Service Requests and the Tasks Not on Service Requests sections takes you to the Work Order Task page.

Update Task Fields

If you are not currently working on the selected task, you may go to the Work Order Task page to update the task fields. The screenshot below shows a sample Work Order Task page. Your page may look different depending on type of task and configuration.

Work Order Task	
Asset ID ROAD01 - ROAD 01   	
Repair Location QA-FULL-01 - QA FULL SRV LOCATION 01	
Task ID QA-RP-02 - QA REPAIR TASK 2	
Work Order ID QA-FULL-01-2025-50 	Job Status OPEN
Job Type REPAIR	Technician LM-EMP -
WO Linear Position ROAD01: from ROAD01-01 +0.0000 ft to ROAD01-05 +0.0000 ft	
Projected Completion Date 08/21/2025 02:44 PM	Priority 02 - MED.PRIORITY - 3 DAYS

Update Task Fields	Update Work Order Fields
WAC  ☐ Final Status Work Class  Warranty Work NO  Repair Reason QA-1  REASON 1 - BASIC Account ID QA1  QA - GENERAL ACCT Priority ID 02  MED.PRIORITY - 3 DAYS Standard Repair Time 0.00 Estimated Hours 0.00 Total number of times task performed 1 Calculate Estimate Equipment Warranty ☐ Warranty Vendor ID  Location QA-FULL-01 - QA FULL SRV LOCATION 01  Date and time completed / / : :  Comment	Notes Add a new note

 PM Item: A blue or yellow oil can  icon will show in the Work Order Task title if the task is a PM or Inspection task. Blue represents a completed task and yellow indicates an incomplete task. A red alert triangle represents a PM checklist exception item has failed. Clicking the oil can or triangle icon takes you to the Work Order PM Checklist page.

 Account ID at the task level serves as the default on postings for that task on the work order (to allow capital and non-capital to be performed on the same work order and have the account requirements and defaults applied appropriately at the posting level). For accounts on work orders and tasks, if the Repair Reason is flagged in the GUI to require Account ID entry, the Account ID will not default from the equipment

but will require the user to enter it. The Account ID on labor, parts, and commercial postings will default from the task. If the task does not yet exist on the work order, the Account ID on the posting will default from the work order.



The C/C/C/ Information section allows you to specify some of the 3C fields on the service request.



Task procedure information is listed on this page if it has been set in the GUI or Enterprise Portal screens. In the Enterprise Portal screens, go to the **Tasks Primary Info** screen. On the Procedure Info tab, enter the needed text in the **Task Procedure information** field to have procedure information show. Click **Save** to save your entries on this screen.



Standard Repair Time indicates what the Standard Repair Time (SRT) is for the current task. This is the Labor Hours field from the class/task record.



Clicking the **Calculate Estimate** button will multiply the number of times the task will be performed by the task's Standard Repair Time and set the resulting value in the Estimate Hours field on the task.



A **No Parts Needed** checkbox is also on the Postings Labor and Commercial tabs of the Parent Work Order ID page, the Edit Work Order Labor and Edit Work Order Commercial dialogs, and the Post Work Order Labor and Post Work Order Commercial dialogs. Technicians only need to enable the **No Parts Needed** box once per task to which it applies. When technicians flag **No Parts Needed** on the task, it is not necessary to go into each posting to set the flag. Likewise, if the flag is set when posting labor, it is automatically set on the task. If there are multiple postings under a single task and one posting is flagged, the task is automatically flagged.



Click **Save** to save your entries on the Work Order Task page.

Update Work Order Task Information

Once you have begun working on a particular task, you may go to the Work Order Task page to update the task and work order fields, change the task time code and stop the task and/or finish the work order.



Note: The setting on the Locations screen, Work Orders - Defaults tab, **Default the work order finish date and time from latest labor or commercial transaction instead of now**, also applies to the Date and time completed that is applied to the tasks upon finishing the work order.

Warranty Vendor ID		...
Location	1 - OPS ▼	
Back Save Stop Task Finish WO		

Additional buttons/options display on the Work Order Task Page when you are jobbed on to a task

Change the Task Time Code by selecting a new time code from the search and click **Save** to save the change.

Click **Stop Task** to stop the task and go back to the Main Technician page. Depending on the configuration, the **Clock Out** button may display once the technician stops working on a task.

Finish Work Orders on the Work Order Task Page

To finish the work order:

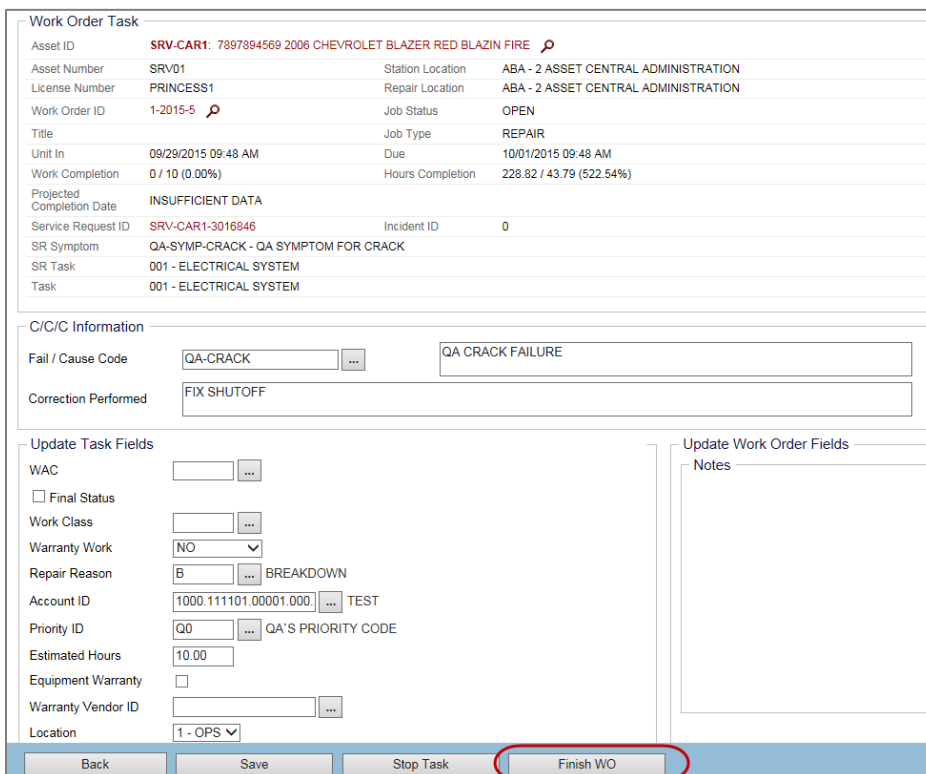
1. Click the **Finish WO** button.

The Work Order Detail Page displays.

2. You may view the items necessary to complete the work order or proceed with completing the work order.

 The **Finish WO** button is highlighted if the setting is set to warn the user when it's the last task on the work order and should be finished AND all tasks on the work order have 'Final Status' WAC selected. See the [Work Order Finish Page](#) section below for more details on this page.

If you have begun working on a rebuild work order task, the page looks slightly different than shown in the screenshot below.



The screenshot shows the 'Work Order Task' page with the following details:

- Asset ID:** SRV-CAR1: 7897894569 2006 CHEVROLET BLAZER RED BLAZIN FIRE
- Asset Number:** SRV01
- License Number:** PRINCESS1
- Work Order ID:** 1-2015-5
- Title:** 09/29/2015 09:48 AM
- Unit In:** 10/01/2015 09:48 AM
- Work Completion:** 0 / 10 (0.00%)
- Hours Completion:** 228.82 / 43.79 (522.54%)
- Projected Completion Date:** INSUFFICIENT DATA
- Service Request ID:** SRV-CAR1-3016846
- SR Symptom:** QA-SYMP-CRACK - QA SYMPTOM FOR CRACK
- SR Task:** 001 - ELECTRICAL SYSTEM
- Task:** 001 - ELECTRICAL SYSTEM

C/C/C Information:

- Fail / Cause Code:** QA-CRACK
- Correction Performed:** FIX SHUTOFF

Update Task Fields:

- WAC:** [Dropdown]
- Final Status:** ☐
- Work Class:** [Dropdown]
- Warranty Work:** NO
- Repair Reason:** B BREAKDOWN
- Account ID:** 1000.111101.00001.000 TEST
- Priority ID:** Q0 QA'S PRIORITY CODE
- Estimated Hours:** 10.00
- Equipment Warranty:** ☐
- Warranty Vendor ID:** [Dropdown]
- Location:** 1 - OPS

Update Work Order Fields:

- Notes:** [Text Area]

Buttons: Back, Save, Stop Task, **Finish WO** (highlighted with a red circle)

3. Check the **Task Done-Unassign** box to unassign all assigned employees from the task.
4. Click the **Stop Task** button to stop the task and go back to the Main Technician page.

5. Click **Finish WO** on the Work Order Details page to finish the work order. See the [Work Order Finish Page](#) and [Work Order Details Page](#) sections for more details on this page.

12. Work Order Task Selector Page

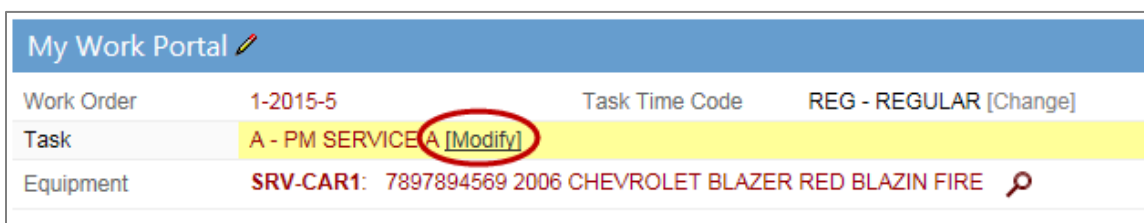
The Work Order Task Selector page allows the technician to modify a task and add a task to the selected work order or service request.

Modify a Task

If you mistakenly jobbed onto the wrong task, you may change tasks.

To change tasks:

1. Click the **Modify** link on the main Technician page.

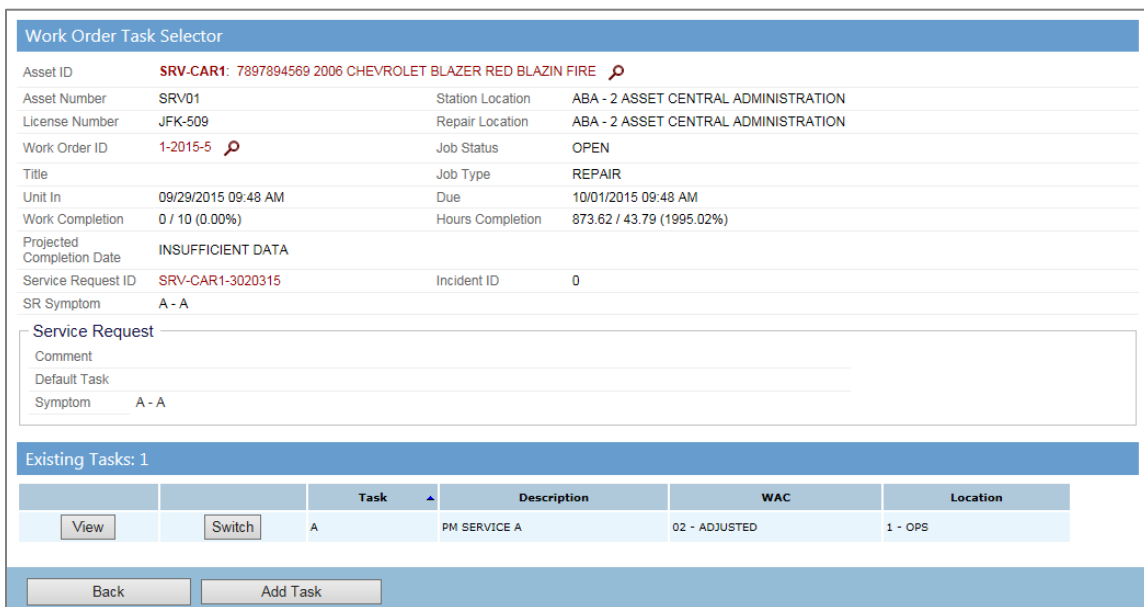


My Work Portal 

Work Order	1-2015-5	Task Time Code	REG - REGULAR [Change]
Task	A - PM SERVICE A [Modify]		
Equipment	SRV-CAR1: 7897894569 2006 CHEVROLET BLAZER RED BLAZIN FIRE 		

 When the task is highlighted yellow, there is a procedure associated with the task.

The Work Order Task Selector page displays.



Work Order Task Selector

Asset ID	SRV-CAR1: 7897894569 2006 CHEVROLET BLAZER RED BLAZIN FIRE 		
Asset Number	SRV01	Station Location	ABA - 2 ASSET CENTRAL ADMINISTRATION
License Number	JFK-509	Repair Location	ABA - 2 ASSET CENTRAL ADMINISTRATION
Work Order ID	1-2015-5 	Job Status	OPEN
Title		Job Type	REPAIR
Unit In	09/29/2015 09:48 AM	Due	10/01/2015 09:48 AM
Work Completion	0 / 10 (0.00%)	Hours Completion	873.62 / 43.79 (1995.02%)
Projected Completion Date	INSUFFICIENT DATA		
Service Request ID	SRV-CAR1-3020315	Incident ID	0
SR Symptom	A - A		

Service Request

Comment

Default Task

Symptom A - A

Existing Tasks: 1

	Task	Description	WAC	Location
View	Switch	A	PM SERVICE A	02 - ADJUSTED
				1 - OPS

2. Click the correct **Switch** button on an existing task.
 - Instead of switching tasks, you can also click **View** to go to the Work Order Task page. Refer to the [Work Order Task Page](#) section above for more information about this page.

The Modify Tasks pop-in displays.

Additional items to update from APK-TA.D101 to 001.305

Why are you modifying this task?

Parts Posted

Select	Date	Employee	Part ID	Issue Location	WAC	Qty	Position
--------	------	----------	---------	----------------	-----	-----	----------

Part Requests

Select	Date	Employee	Part ID	Description	Status	Qty
☐	10/22/2015 01:25 PM	MOLLY-EMP	CNPART001-0	499; STOCK PART 001	PENDING	1

Close Update

3. Select a reason from the **Why are you modifying this task?** Drop-down list.
 - If parts were posted or requested, select the desired parts posted and/or part requests to update with the task modification.

Your options from the drop-down list are as follows:

- WRONG TASK
- FURTHER DEFINED TASK

- Click **Update** to update the task accordingly.

Additional items to update from APK-TA-D101 to 001-305

Why are you modifying this task? WRONG TASK

Parts Posted

Select	Date	Employee	Part ID	Issue Location	WAC	Qty	Position
☐							

Part Requests

Select	Date	Employee	Part ID	Description	Status	Qty
☒	10/22/2015 01:25 PM	MOLLY-EMP	CNPART001-0	499; STOCK PART 001	PENDING	1

Close Update

- After updating, this logs you off of the current task (if you chose **Switch**). A new record is created in the **Tsk_Modified** table. This records the old task value, the new task value, and reason code.
- To add a task, follow the instructions below to [Add a Task to the Work Order](#).

Modifying your current task in this way ensures that when you stop logging time, the labor entry will be posted to the correct task code.

Adding a Task to Work Orders and Service Requests

The task selector process is similar whether you are adding a new task (repair task, PM/Inspection service, etc.) to the work order or service request. The sections below outline how to add a task to work orders and service requests.

Add a Task to a Work Order

Open the task selector by clicking the specified button on one of the following pages:

- Click the **Add Task** button on the **Work Order Task Selector** page when you are modifying a task as shown in the screenshot below.

Work Order Task Selector

Asset ID: **SRV-CAR1: 7897894569 2006 CHEVROLET BLAZER RED BLAZIN FIRE**

Asset Number: SRV01 Station Location: ABA - 2 ASSET CENTRAL ADMINISTRATION

License Number: JFK-509 Repair Location: ABA - 2 ASSET CENTRAL ADMINISTRATION

Work Order ID: 1-2015-5 Job Status: OPEN

Title: Job Type: REPAIR

Unit In: 09/29/2015 09:48 AM Due: 10/01/2015 09:48 AM

Work Completion: 0 / 10 (0.00%) Hours Completion: 873.62 / 43.79 (1995.02%)

Projected Completion Date: INSUFFICIENT DATA

Service Request ID: SRV-CAR1-3020315 Incident ID: 0

SR Symptom: A - A

Service Request

Comment:

Default Task:

Symptom: A - A

Existing Tasks: 1

Task	Description	WAC	Location
A	PM SERVICE A	02 - ADJUSTED	1 - OPS

Back Add Task

- Click the **New Task** button on the **Technician Main** page as shown in the screenshot below.

Select Symptom: A - A

Start A - PM SERVICE A

Tasks not on Service Requests

Start AC1 - BASIC TASKS

Start CNINSPECT001 - INSPECTION 001

Add / Manage SRs New Task Start Task

Search

- Click the **New Task** button in the **Tasks** section of the **Work Order Main** page as shown in the screenshot below.

Tasks: 5

Task ID	WAC	Remaining Hours
AC1 - BASIC TASKS		-0.58
AC1-PM - BASIC PM TASKS	05	-8.10
CNINSPECT001 - INSPECTION 001		-663.02
CNTASK005 - CN REPAIR		

New Task Start Task

- Click the **New Task** button in the **Tasks** not on Service Requests section of the **Work Order Details** page as shown in the screenshot below.

Tasks not on Service Requests Labor Parts Cmi **New Task**

A - PM SERVICE A Remaining Hours: -180.48 WAC: 02 

Labor:

Date	Technician	WAC	Hours	Cost
08/18/2016	SRV - SARAH VICKERS	02 - ADJUSTED	194.00	4229.20
08/10/2016	SRV - SARAH VICKERS		0.27	5.89
Total:			194.27	4235.09

Parts:

Date	Part ID	Manuf Part No	Manufacturer	Description	WAC	Qty	Unit Price	Total Cost
08/16/2016	EAR PLUGS-0			SAFETY; DISPOSABLE FOAM EARPLUGS	02 - ADJUSTED	2.00	0.0000	0.00
Total:								0.00

In each of the cases mentioned above, the Add Work Order Tasks Pop-in displays with several tabs displayed (depending on data conditions).

1-2015-5 -- Add Work Order Tasks

Repair Tasks PM Services Inspections Standard Jobs Task Search

Jump to

Task ID	Description
001	ELECTRICAL SYSTEM
AC1	BASIC TASKS
CNT	CN REPAIR GROUP
GNM	GNM REPAIR GROUP
JSR	JSR
KG2	KG RPR GRP2
KGR	KG REPAIR GROUP
KGT	KG TEST REPAIR GROUP
PIR	TEST

Pending Tasks: 0

Task ID	Description
---------	-------------

Cancel Save

The following sections provide steps to add a task to the work order based upon the data conditions and the tab you wish to use.

Repair Tasks Tab

From the **Repair Tasks** tab, you may add a repair task by following the steps below.

1-2015-5 -- Add Work Order Tasks

Repair Tasks | PM Services | Inspections | Standard Jobs | Task Search

Jump to:

Task ID	Description
KGT	KG TEST REPAIR GROUP
KGTASK1	KG TASK1
KGTASK2	TESTING LONG TASK DESCRIPTION TO SEE IF THIS CAUSES ANY ISSU
KGTASK300	KG TASK 300
KGTASK400	KG TASK 400
KGTASK50	KG TASK 50
KGTASK51	KG TASK 51
KGTASK60	KG TASK 60

Pending Tasks: 27

Task ID	Description
001	ELECTRICAL SYSTEM
001-115	CIRCUIT BOARD / PRINTED C.B.

Cancel Save

1. Enter a repair group number in the **Jump to** field to highlight the desired repair group. Or, click the repair group to it.



Note: The arrow next to the line indicates a further drill-down associated with the line.

The tasks associated with the Repair Group display.

2. Select a task associated with the repair group.
3. Depending on your data configuration, an additional list of tasks may display. Click on the specific task to add to the work order.
4. The task displays in the **Pending Tasks** list.



Note: Click the **X** to take the task off the list. Or, you may add another task by selecting a different tab and following the tab's instructions as indicated in the sections below.

5. Click the **Save** button to add the task to the list.

The task displays in the Existing Tasks list on the Work Order Task Selector page.

6. Click the **Add Task** button to add another task or click the **Back** button to go back to the **Work Order Main** page.

The task now shows on both the Work Order Main and Technician Main pages.

PM Services Tab

From the **PM Services** tab, you may add a PM service by following the steps below.

1-2015-5 -- Add Work Order Tasks

Repair Tasks | **PM Services** | Inspections | Standard Jobs | Task Search

Task ID	Description
A	PM SERVICE A
A - EXC	PM SERVICE A - EXCEPTION BASED
A-SMALL	PM SERVICE A
AC1-PM	BASIC PM TASKS
B	PM SERVICE B
CBQA-PM	CB'S PM SERVICE
CL2-TRAC-3	3 MONTH TRACTOR PM
CNPMSEV001	PM SERVICE 001
JSPMSRVA	JSPMSRVA
TCNMC01B	TCNMC01B

Pending Tasks: 30

Task ID	Description
☒ 001	ELECTRICAL SYSTEM
☒ 001-115	CIRCUIT BOARD / PRINTED C.B.
☒ A-SMALL	PM SERVICE A

Cancel Save

1. Click the **PM Service Task ID** to select the desired PM Service.
2. The PM Service displays in the **Pending Tasks** list.



Note: Click the **X** to take the service off the list. Or, you may add another task by selecting a different tab and following the tab's instructions as indicated in the sections below.

3. Click the **Save** button to add the task to the list.

The PM Service displays in the Existing Tasks list on the Work Order Task Selector page.

4. Click the **Add Task** button to add another task or click the **Back** button to go back to the **Work Order Main** page.

The PM service now shows on both the Work Order Main and Technician Main pages.

Inspections Tab

From the **Inspections** tab, you may add an inspection task by following the steps below.

1-2015-5 -- Add Work Order Tasks

Repair Tasks PM Services **Inspections** Standard Jobs Task Search

Task ID	Description
CNINSPECT001	INSPECTION 001
CNINSPECT002	INSPECTION 002
COMP - TUES	FUEL STATION CNG COMPRESSOR DAILY INSPECTION - TUESDAY
EPE ETS	RAIL TRUCK INSPECTION
KG-INSP01	KG INSP01
KG-INSP02	KG INSP02
KG-INSP03	KG INSP03
KG-INSP04	KG INSP04
KG-INSP05	KG INSP05

Pending Tasks: 31

Task ID	Description
☒ 001	ELECTRICAL SYSTEM
☒ 001-115	CIRCUIT BOARD / PRINTED C.B.
☐ A-CMALL	PM SERVICE A

Cancel Save

1. Click the **Task ID** to select the desired inspection.
2. The inspection displays in the **Pending Tasks** list.



Note: Click the **X** to take the task off the list. Or, you may add another task by selecting a different tab and following the tab's instructions as indicated in the sections below.

3. Click the **Save** button to add the task to the list.

The Inspection displays in the Existing Tasks list on the Work Order Task Selector page.

4. Click the **Add Task** button to add another task or click the **Back** button to go back to the Technician Main page.

The inspection now shows on both the Work Order Main and Technician Main pages.

Standard Jobs Tab

From the **Standard Jobs** tab, you may add a standard job (which usually includes more than one task) by following the steps below.

1-2015.5 -- Add Work Order Tasks

Repair Tasks PM Services Inspections **Standard Jobs** Task Search

Tasks on Standard Job
310-A-ML - 310 B INSPECTION FOLLOW-UP

Standard Job	Description	Task ID	Description
310 A CAR HEAVY UNDER CLEANING	310 A CAR HEAVY UNDER CAR CLEANING	ATF-AT-0101	ATC - INSPECTION F/U
310-A-ML	310 B INSPECTION FOLLOW-UP	CDF-MA-0102	ELECTRICAL COUPLER - INSPECTION F/U
310-ML A INSPECTION FOLLOW UP	310 A INSPECTION FOLLOW-UP	DOF-MA-0101	DOORS - BUTTONS INSPECTION F/U
310-ML C INSPECTION FOLLOW-UP	310 C INSPECTION FOLLOW-UP	DOF-MA-0102	CAB AND END DOOR INSPECTION F/U
		DOF-MA-0103	SIDE DOORS - 'B' AND 'C' INSPECTION F/U
		HVF-MA-0102	HVAC EVAP UNIT INSPECTION F/U
		PRF-MA-0103	PROPULSION ECE - INSPECTION F/U
		DRF-MA-0104	DRIVE SHAFT INSPECTION F/U

Add Standard Job

Pending Tasks: 31

Task ID	Description
☒ 001	ELECTRICAL SYSTEM
☒ 001-115	CIRCUIT BOARD / PRINTED C.B.
☒ 001-116	PM SERVICE A

Cancel Save

1. Click the standard job.

The tasks on Standard Job display.

2. Click **Add Standard Job**.

The tasks and job display in the Pending Tasks/Standard Jobs list.

 **Note:** Click the **X** to take the standard job off the list. Or, you may add another task by selecting a different tab and following the tab's instructions as indicated in the sections below.

3. Click the **Save** button to add the tasks to the list.

The Standard Job tasks display in the Existing Tasks list on the Work Order Task Selector page.

4. Click the **Add Task** button to add another task or click the **Back** button to go back to the Work Order Main page.

The standard job tasks now show on both the Work Order Main and Technician Main pages.

Task Search Tab

From the **Task Search** tab, you may search for a task by following the steps below.

1-2015-5 -- Add Work Order Tasks
✕

Repair Tasks
PM Services
Inspections
Standard Jobs
Task Search

Tasks Found: 0

Task Type	Task ID ▲	Description
Please enter some search criteria		

Pending Tasks: 31

	Task ID ▲	Description
☐	001	ELECTRICAL SYSTEM
☐	001-115	CIRCUIT BOARD / PRINTED C.B.
☒	A SMALL	PM SERVICE A

1. Enter a key word or part of the description in the field.
2. Click on the **Search** button to bring up all tasks that meet the criteria.
3. Click on the specific task/service to add to the list of tasks related to the work order.
4. The task/service displays in the **Pending Tasks** list.

 Click the **X** to take the task off the list. Or, you may add another task by selecting a different tab and following the tab's instructions as indicated in the sections below.

5. Click **Save** to add the task to the list.

The task/service displays in the Existing Tasks list on the Work Order Task Selector page.

6. Click **Add Task** to add another task or click **Back** to go back to the **Technician Main** page.

The task now shows on both the Work Order Main and Technician Main pages.

Add a Task to a Service Request

Tasks may be added to work order-linked service requests in order to explain the steps taken to resolve the complaint or repair. To add a new task to the service request, follow the steps below. You cannot add a task to a service request that is a general task with no equipment ID attached to it.



Adding a new task to the Service Request also adds the task to the work order.

Initiate the task selector process by clicking the specified button on one of the following pages:

- Click **Select** on the **Current Job** tab of the **Technician Main** page as shown in the screenshot below:
- Click **Select** in the Service Request/Defects list on the Work Order Main page.
- Select **Add Task** on the **Work Order Task Selector** page for a service request as shown in the screenshot below.



Clicking the **Select Repair Group** button also takes you through the Task Selector process, with the current Repair Group already selected.

- Click **New Task** in the Service Request section of the Work Order Details page.

In each of the cases mentioned above, the Task Selector Pop-in displays with several tabs displayed (depending on data conditions).

The tab procedures are the same whether adding tasks to service requests or adding tasks to work orders. Please follow the tab-specific instructions listed above in the [Add a Task to a Work Order](#) section to add a task to the service request.



The **Supported Tasks** tab shows **ONLY** for service requests with defined supported tasks. Follow the steps below to add a supported task to the service request.

Supported Tasks Tab (Service Requests Only)

The Supported Tasks tab shows up when defined task codes have been linked to the service request's symptom ID. You may create a list of commonly-performed tasks related to each symptom on the Symptom screen's Supported Tasks area (Setup > Shop Activity > Symptoms: Basic Info).

From the Supported Tasks tab, you may add a supported task to the service request by following the steps below.

1-2015-5 -- Add Work Order Tasks

Complaint: QA-SYMP-CRACK - QA SYMPTOM FOR CRACK

Cause: QA-CRACK - QA CRACK FAILURE

SR Repair Task: 001 - ELECTRICAL SYSTEM

Search

Repair Tasks | PM Services | Inspections | Standard Jobs | Task Search | **Supported Tasks**

Task ID	Description
Q1-01	QA TASK
Q1-01-01	COMP WARR TASK
Q1-01-02	COMP WARR TASK NEVER UNDER WARRANTY

Pending Tasks: 0

Task ID	Description
---------	-------------

Cancel Save

1. Click the supported task to select it.
2. The task displays in the **Pending Tasks** list.

 **Note:** Click the **X** to take the task off the list. Or, you may add another task by selecting a different tab and following the tab's instructions.

3. Click **Save** to add the task to the list.

*The task displays in the **Existing Tasks** list on the **Work Order Task Selector** page.*

13. Work Order Service Requests Page

Click the **Add/Manage** button on the Work Order Main page to open the Work Order Service Requests page.

Service Requests / Defects: 4

	Code - Description
Select	Symptom: CN-SYMP-TOM-001 - DESCRIPTION: SYMPTOM 001
+ Select	Symptom: QA-SYMP-CRACK - QA SYMPTOM FOR CRACK Task: 001 - ELECTRICAL SYSTEM
+ Select	Symptom: ANOTHER-OIL - ANOTHER OIL
+ Select	Symptom: A - A

EMPLOYEE SRV REQUESTED RETURN FOR QUANTITY 2.00 OF PART E
COMMENTS: WAS NOT NEEDED.

08/10/2016 08:21 AM SRV - S
Service Request: CN-SYMP-TOM-001 - DESCRIPTION: SYMPTOM 001
NOTE ON THE SYMPTOM DESCRIPTION.

08/10/2016 08:18 AM SRV - S
Task: CNINSPECT001 - INSPECTION 001
New Note

Title and Comments

Add / Manage

This page shows both unassigned service requests as well as service requests that are assigned to the work order.

Work Order Service Requests

Asset ID: 2119: 1VHGH3C2626700065 2002 ORION 07-501 2002 ORION COMPRESSED NATURAL GAS 40 FOO
Life Meter 1: 415100 MILES Life Meter 2: 0 HOURS
Asset Number: H Station Location: BUS111 - LAREDO MAINTENANCE MAIN
License Number: GV6269A Repair Location: BUS111 - LAREDO MAINTENANCE MAIN
Work Order ID: BSLOC1-2015-2 Job Status: OPEN
Job Type: REPAIR Unit In: 01/26/2015 01:04 PM
Due: 01/27/2015 01:04 PM Meter 1: 415100 MILES
Meter 2: 0 HOURS Hours Completed: 20.83 / 20.83 (100.00%)
Tasks Completed: 0 / 2 (0.00%) Projected Completion Date: 10/14/2015 01:26 PM

Unassigned Service Requests: 1

☐ Task	Symptom	Repair Reason	Entered When	Entered By	Priority
☐ 002-103 - ENGINE - OIL HOSE / LINE	LEAKING-HOSES - FUEL SYSTEM > HOSES > LEAKING HOSES		10/14/2015 01:25 PM	MOLLYT	3
No Comment					

Assign Checked SRs

Assigned Service Requests: 2

☐ Task	Symptom	Repair Reason	Entered When	Entered By	Priority
☐ No Comment	QA-SYMP-CRACK - A CRACK HAS DEVELOPED		02/03/2014 03:59 PM	BS	3
☒ No Comment	QA-SYMP-CRACK - A CRACK HAS DEVELOPED		06/24/2013 10:20 AM	RANNIS	

Unassign Checked SRs

Back New Service Request

Service requests represent work activities that are currently in the equipment ID's to-do list. They may originate from equipment operators, maintenance planners (in the case of campaigns or recalls), yard managers, on-board systems (reporting on AVL or OBDII data), etc. Assigning a service request to your work order means that you intend to resolve the item in the work performed on that work order.

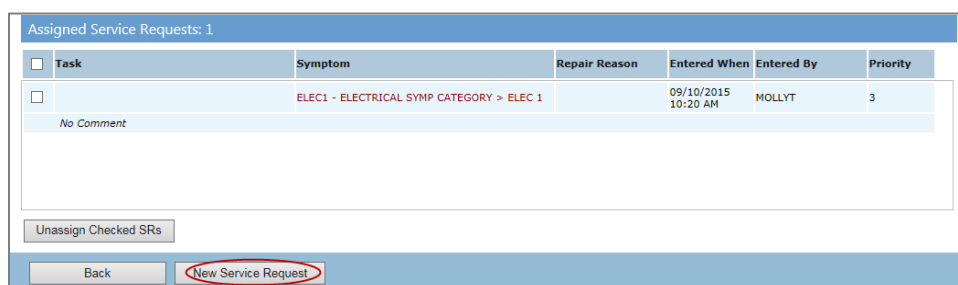
Follow the steps below to assign, unassign, or create service requests:

1. Check the box next to the service requests you wish to assign. Checking the box at the top-left corner automatically checks all the boxes to assign all the service requests listed.
2. Click on the **Assign Checked SRs** button to assign the service requests to the work order.
3. Check the box next to the Service Request you wish to unassign. Checking the box at the top left corner automatically checks all the boxes to unassign all the service requests listed.
4. Click on the **Unassign Checked SRs** button to unassign the service requests.
5. Click the **New Service Request** button to go to the **Service Request/Defect** page where you can create a new service request. Complete the fields and click the **Save** button to create the service request.

The Service Request/Defect page is discussed in the following section.

14. Service Request/Defect Page

The Service Request/Defect page displays after clicking the **New Service Request** button on the Work Order Service Requests page (as mentioned in the above section) or on the Equipment Management page. It also displays when you click the Symptom link in the Service Requests/Defects section on Work Order Main page, or by clicking the **Edit** button in the Service Requests section on the Work Order Details page.



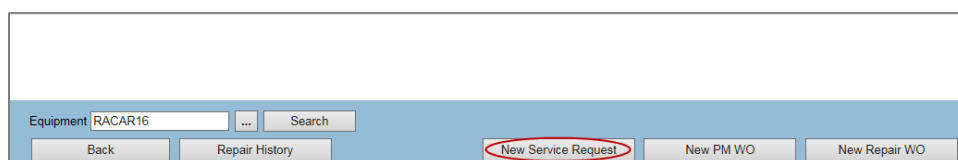
Task	Symptom	Repair Reason	Entered When	Entered By	Priority
☐	ELEC1 - ELECTRICAL SYMP CATEGORY > ELEC 1		09/10/2015 10:20 AM	MOLLYT	3

No Comment

Unassign Checked SRs

Back New Service Request

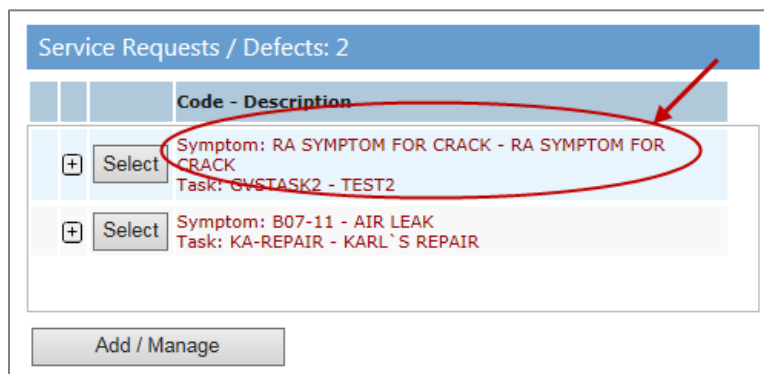
Click the **New Service Request** button on the Work Order Service Requests page



Equipment RACAR16 Search

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

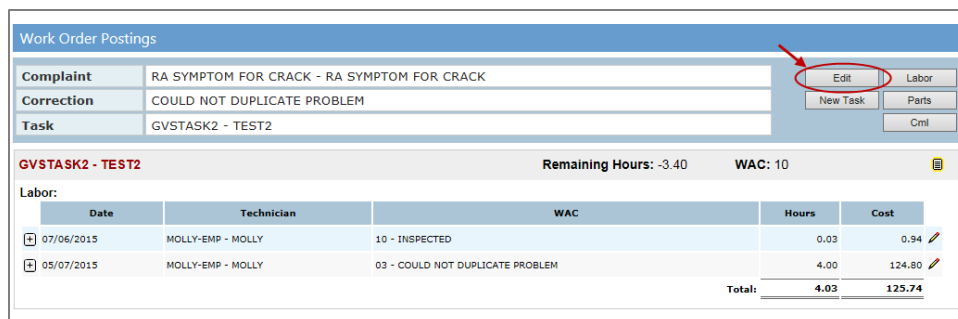
Click the **New Service Request** button on the Equipment Management page. This button allows you to create a new service request that is not associated to a work order.



	Code	Description
[+]	Select	Symptom: RA SYMPTOM FOR CRACK - RA SYMPTOM FOR CRACK Task: SVSTASK2 - TEST2
[+]	Select	Symptom: B07-11 - AIR LEAK Task: KA-REPAIR - KARL'S REPAIR

Add / Manage

Click the **Symptom Link** at the Service Request level in the Service Requests/Defects section on the Work Order Main page



Work Order Postings

Complaint	RA SYMPTOM FOR CRACK - RA SYMPTOM FOR CRACK	Edit	Labor
Correction	COULD NOT DUPLICATE PROBLEM	New Task	Parts
Task	GVSTASK2 - TEST2		Cml

GVSTASK2 - TEST2 Remaining Hours: -3.40 WAC: 10

Labor:

Date	Technician	WAC	Hours	Cost
07/06/2015	MOLLY-EMP - MOLLY	10 - INSPECTED	0.03	0.94
05/07/2015	MOLLY-EMP - MOLLY	03 - COULD NOT DUPLICATE PROBLEM	4.00	124.80
Total:			4.03	125.74

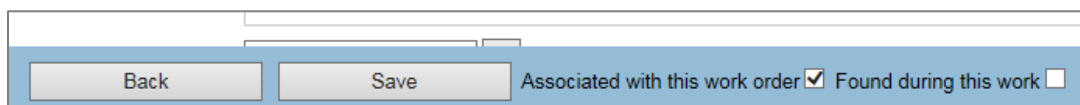
Click the **Edit** button in the Service Requests section of the Work Order Details page

The Service Request/Defect page displays. Any notes added on this page are automatically associated with the service request and task.

 To add files, click **Add**. Refer to the [Actions Tab Section](#) for information about the **Add Link** dialog and adding files.

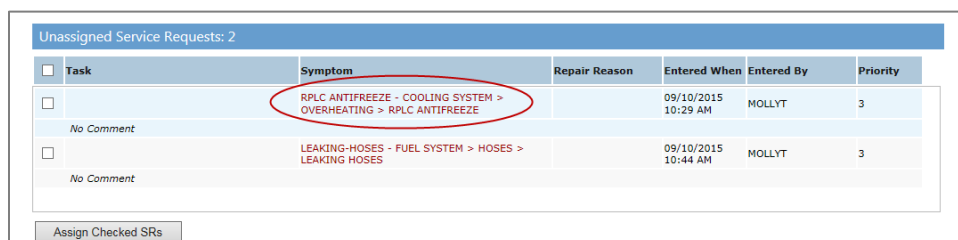
 Depending on whether labor has been posted or not, there may be either an **Unassign** or a **Defer** button at the bottom of the page. The **Unassign** button displays if labor has not yet been posted. Clicking the **Unassign** button removes the assignment of the service request from the work order. The **Defer** button displays if labor has been posted to the service request. You may defer the service request to a later date by clicking the **Defer** button. See the [Defer a Service Request](#) section below for more information about this process.

 If you open a new service request from an existing work order, you have two options at the bottom of the Service Request/Defect page. You can choose to associate the new service request with the work order you opened this from, or have it be found during work with the existing work order. Select the appropriate option for the service request.



Back Save Associated with this work order ☒ Found during this work ☐

If a service request is unassigned and you would like to associate it with a different work order, click the symptom to go to the Service Request/Defect page to create a new work order for the service request.



Unassigned Service Requests: 2

Task	Symptom	Repair Reason	Entered When	Entered By	Priority
☐	RPLC ANTIFREEZE - COOLING SYSTEM > OVERHEATING > RPLC ANTIFREEZE		09/10/2015 10:29 AM	MOLLYT	3
No Comment					
☐	LEAKING-HOSES - FUEL SYSTEM > HOSES > LEAKING HOSES		09/10/2015 10:44 AM	MOLLYT	3
No Comment					

Assign Checked SRs

The Service Request/Defect page displays.

Complete the fields and click **New Work Order**.

Service Request / Defect													
Asset ID	GL-PH-2020-0001 2020 GILLYS PHANTOM 40' BUS												
Station Location	SM - SPOKANE MAINTENANCE SHOP												
Service Request ID	GL-PH-2020-0001-3007248												
Symptom	QA-SYMP-CRACK - QA SYMPTOM FOR CRACK												
Repar Task	001-000-0000 - ELECTRICAL SYSTEM - TROUBLESHOOT - ISSUE FOUND												
Work Order ID	SM-2020-2												
Job Type	REPAIR												
Repair Location	SM - SPOKANE MAINTENANCE SHOP												
Incident ID	0												
Job Status	OPEN												
WO Meter 1	0 MILES												
Basic Information Location SM SPOKANE MAINTENANCE SHOP Jurisdiction Condition rating Task ID 001-000-0000 Lookup ELECTRICAL SYSTEM - TROUBLESHOOT - ISSUE FOUND Priority ID 4 PREVENTATIVE MAINTENANCE Estimated Hours 0.00 Source Reporting Source Operator ID Name Phone Number Email Address													
Complaint / Cause / Correction Symptom QA-SYMP-CRACK QA SYMPTOM FOR CRACK Complaint QA SYMPTOM FOR CRACK Task Fail / Cause Code QA-CRACK QA CRACK FAILURE Cause QA CRACK FAILURE WAC Correction FIX SHUTOFF Tasks <table border="1"> <thead> <tr> <th>Delete</th> <th>Task</th> <th>Description</th> <th>Corrected Failure</th> </tr> </thead> <tbody> <tr> <td>☐</td> <td></td> <td>Lookup</td> <td>☐</td> </tr> </tbody> </table>		Delete	Task	Description	Corrected Failure	☐		Lookup	☐				
Delete	Task	Description	Corrected Failure										
☐		Lookup	☐										
Faults <table border="1"> <thead> <tr> <th>Delete</th> <th>Fault Code</th> <th>Procedure</th> <th>Datetime Occurred</th> <th>Comments</th> <th>Reported By</th> </tr> </thead> <tbody> <tr> <td>☐</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		Delete	Fault Code	Procedure	Datetime Occurred	Comments	Reported By	☐					
Delete	Fault Code	Procedure	Datetime Occurred	Comments	Reported By								
☐													
Notes Notes New Note Comments													
Files Add													
Back Save Unassign Print Service Request													

The New Work Order page displays with the existing service requests for the asset displayed at the bottom of the page. Use the navigation menu on the left side to quickly jump to a certain area of the page as needed.

The following sections are available: Service Request/Defect, Basic Information, Source, Complaint/Cause/Correction, Tasks, Faults, Notes, Comments and Files



The **Faults** section allows you to view Fault Codes or TM Alerts associate with the service request.

New Work Order CNLOC1-2015-383

Job Type REPAIR

Equipment ID RACAR16  MOTOR POOL SEDAN
2012 HONDA CIVIC, METERS: 1-1 MILES; 2-0 NONE

Work Details

☐ **Messages**

OTHER OPEN WORK ORDERS

WORK ORDER NUMBER	TYPE	STATUS	SCHEDULED	REASON	SERVICE
CNLOC1-2015-368	REPAIR	OPEN		CN01	
JHLOC1-2015-4	REPAIR	OPEN		CN01	
JHLOC1-2015-13	REPAIR	OPEN		CN01	

UNIT IS 924 DAYS LATE FOR PM SERVICE A - DUE DATE 02/28/2013

Meter1 1 **Meter1 Validation** 

Repair reason ID CN01  REPAIR REASON MAX CHARACTER 01

Work Class 

Service Status RA-PART  PART REQUEST SERVICE STATUS

Date and Time In 09/10/2015 01:24 PM 

Date and Time Due 09/11/2015 01:24 PM 

Repair Site 01  FACILITY

Vendor 

Technician MOLLY-EMP MOLLY

Estimated Appointment Hours

Contact Name

Phone

Priority ID 3  ROUTINE

Account ID 1000.114409.00001.000.00000  BALANCE SHEET

Warranty Work NO 

Notification Template 

Notes

New Service Request

Standard Job 

Symptom 

Fail / Cause Code 

WAC 

Correction Performed

Existing Service Requests for this Asset

Assign	Task	Symptom	Entered When	Entered By	Priority
☒	No Comment	RPLC ANTIFREEZE	09/10/2015 10:29 AM	MOLLYT	3
☐	No Comment	LEAKING-HOSES	09/10/2015 10:44 AM	MOLLYT	3



It is possible to change the equipment ID on a service request based on settings.

This process may be done manually at the service request level, or by changing the equipment ID of a work order that has service requests attached. When the setting is enabled for a work order location, the user can change the equipment ID of all assigned service requests by changing the equipment ID on the work order they are assigned to. If this option is not enabled, the user has to manually unassign service requests from a work order to change the equipment ID on that work order. You may also change a service requests to no equipment ID so the supervisor can determine the correct equipment ID and enter it if it is unknown. Please note that if you make use of the ability to have service requests without an equipment ID, they will be pending service requests and will not show in the portal under the service requests area.



Any change to asset ID or offsets on a linear work order will result in all service requests being unassigned and the user must manually re-assign if desired.

15. Finish Work Order Page

When the technician has completed repairs and the Equipment ID is ready to go back into service, the work order is placed into a Work Finished status. This status indicates to the shop supervisor that the work is complete and the work order (and all related details) is available for review and closing.

When you click the **Finish Work Order** button on the Work Order Main page, if there are items that need to be completed prior to finishing the work order, you are taken to the Work Order Task page.

Actions		
Main Page	Start Delay	View/Edit Detail
Finish Work Order	Part Actions	
Equipment History	Test Results	Related Files
Messages	Print Work Order	Component Warranty
Commercial Work	Postings	Relationships

Finish Work Order			
Asset ID	SRV-CAR1: 7897894569 2006 CHEVROLET BLAZER RED BLAZIN FIRE 		
Asset Number	SRV01	Station Location	ABA - 2 ASSET CENTRAL ADMINISTRATION
License Number	JFK-509	Repair Location	ABA - 2 ASSET CENTRAL ADMINISTRATION
Work Order ID	1-2015-5 	Job Status	OPEN
Title		Job Type	REPAIR
Unit In	09/29/2015 09:48 AM	Due	10/01/2015 09:48 AM
Work Completion	0 / 10 (0.00%)	Hours Completion	1016.40 / 43.79 (2321.08%)
Projected Completion Date	INSUFFICIENT DATA		
The following item(s) must be completed: • Test Result 352306 - Test result cannot be PENDING or IN PROGRESS when test is closed - PR-ERR: 1190 • Test Result 352307 - Test result cannot be PENDING or IN PROGRESS when test is closed - PR-ERR: 1190 • Test Result 352308 - Test result cannot be PENDING or IN PROGRESS when test is closed - PR-ERR: 1190 • PM Checklist A (Optional-Not Required)			

This page lets you review items pending to complete the work order. To complete a linked item, click on the red link related to the item. When all items are complete, the Work Order Details page automatically displays with a **Finish WO** button. However, depending on settings you may also be prompted to enter meter readings at this point before going to the Work Order Details page. See the [Work Order Details Page](#) section for more information about this page.

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	JFK-509	Repair Location	ABA - 2 ASSET CENTRAL ADMINISTRATION		
Work Order ID	1-2015-5	Job Status	OPEN		
Title			Job Type	REPAIR	
Unit In	09/29/2015 09:48 AM	Due	10/01/2015 09:48 AM		
Work Completion	0 / 10 (0.00%)	Hours Completion	1016.40 / 43.79 (2321.08%)		
Projected Completion Date	INSUFFICIENT DATA				
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				

Summary Cost Info					
Labor Hours	Labor Cost	Parts Cost	Commercial Cost	Equipment Cost	Total Cost
1016.40	22160.72	0.00	2289.00	0.00	24449.72

Notes	
08/17/2016 03:16 PM	SRV - SARAH VICKERS
EMPLOYEE SRV REQUESTED RETURN FOR QUANTITY 2.00 OF PART EAR PLUGS-0. COMMENTS: WAS NOT NEEDED.	
08/10/2016 08:21 AM	SRV - SARAH VICKERS
Service Request: CN-SYMPOM-001 - DESCRIPTION: SYMPTOM 001	
NOTE ON THE SYMPTOM DESCRIPTION.	
08/10/2016 08:18 AM	SRV - SARAH VICKERS
Task: CNINSPECT001 - INSPECTION 001	
New Note	

Back	Assignments	Finish Work Order	Transfer/Defer Work
------	-------------	-------------------	---------------------

The **Finish WO** button is disabled if the user does not have control rights to check the **Work Finished** box in the GUI. The button is either hidden or disabled depending on whether the user has rights to view or edit the control, respectively.

Clicking the **Finish Work Order** button moves the work order status to FINISHED. This action brings up the following pop-in which allows you to back-date the finish date/time, if desired. Or, depending on settings, the date and time finished may default from latest labor or commercial transaction instead of now. The **Default work order finish date and time from latest labor or commercial transaction instead of now** setting is found on the Locations screen, Work Orders - Defaults tab.

Finish Work Order	
Date and Time Finished	10/04/2016 02:40 PM
Cancel	Finish Work Order



To ensure technicians must confirm they have not used parts on tasks on work orders prior to closing or finishing a work order, set the option **Require confirmation of task with no parts on work order** to **FINISH** or **CLOSE** on the Locations screen's Work Orders – More Info tab. If this option is set to **NEVER**, the **No parts needed** checkbox does not display.

Clicking the **Finish Work Order** button on the pop-in removes the work order from the list. To have the technician automatically taken back to their Main Portal Page when clicking **Finish Work Order**, enable the “Redirect technician to portal home upon finishing work order” setting in the Technician Portal settings. The Work Order status remains **Work Order Finish** until the supervisor closes out the work order.

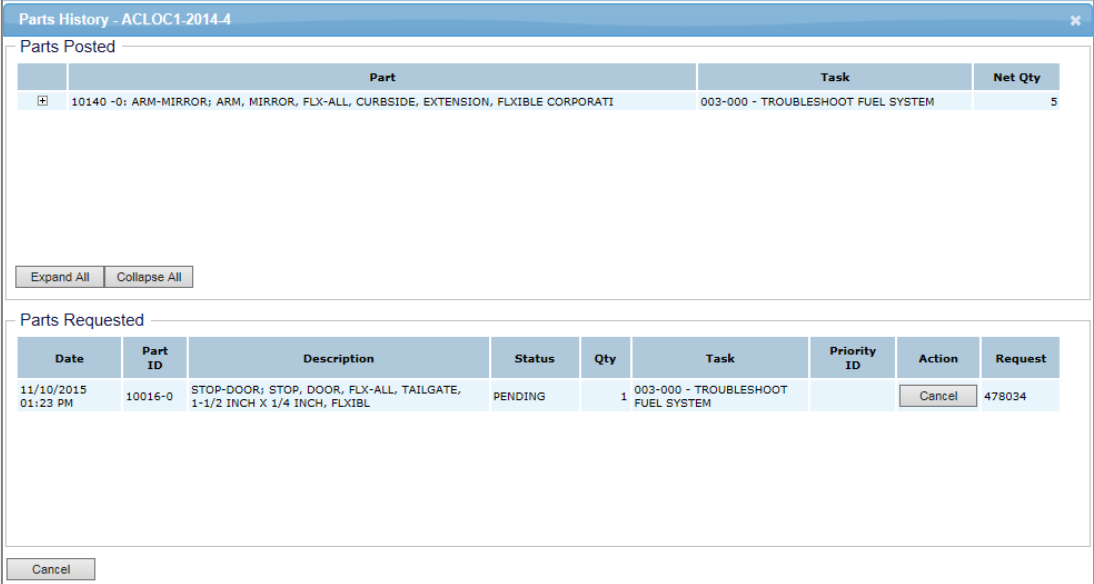
Work Finish Flow for Work Orders with Serialized Parts

When a user attempts to finish a work order for which serialized parts were requested, Web Modules checks whether all serialized parts have all of the serial numbers. If not, the user is presented with a message and a list of each task with parts that are missing serial numbers. The user must enter the serial numbers to finish the work order. Therefore, to finish a work order, all removed serialized parts must be replaced.

16. Parts History Pop-In

- To open the Parts History pop-in, click the **History** button on the Post Work Order Parts pop-in, the Parts Ready icon  on the Main Technician Portal page, or the Pending Part Request  and Parts Ready icons on the Postings page.

The pop-in only shows the Parts Requested after clicking the Pending Part Requests icon or the Parts Ready icon on the Work Order Details page.



Parts History - ACLOC1-2014-4

Parts Posted

Part	Task	Net Qty
10140 -0: ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI	003-000 - TROUBLESHOOT FUEL SYSTEM	5

Expand All Collapse All

Parts Requested

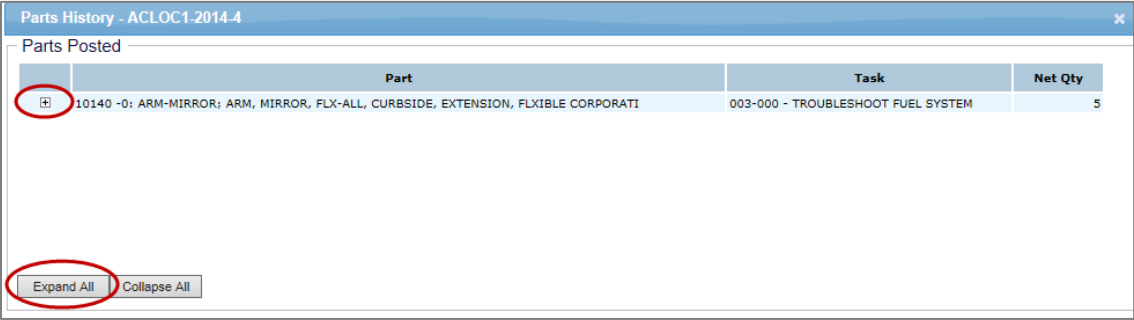
Date	Part ID	Description	Status	Qty	Task	Priority ID	Action	Request
11/10/2015 01:23 PM	10016-0	STOP-DOOR; STOP, DOOR, FLX-ALL, TAILGATE, 1-1/2 INCH X 1/4 INCH, FLXIBL	PENDING	1	003-000 - TROUBLESHOOT FUEL SYSTEM		Cancel	478034

Cancel

This pop-in details both Parts Posted and Parts Requested.

-  The Parts Ready icon displays next to the parts that are ready for pickup. It is the parts room clerk's responsibility to remove the Notify flag once the parts have been picked up.

- Click the **+** or the **Expand All** buttons to view the Parts Posted detail.



Parts History - ACLOC1-2014-4

Parts Posted

Part	Task	Net Qty
10140 -0: ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI	003-000 - TROUBLESHOOT FUEL SYSTEM	5

Expand All Collapse All

- Likewise, click the **-** or **Collapse All** buttons to collapse the view.

 When the view is expanded, a **Return** button exists in the **Parts Posted** section.

- In the Parts Requested section, hover over the Status column for part requests with Status as ORDERED, to see information for the specific purchase order as shown in the following screenshot.

Parts Requested						
Date	Part ID	Description	Task	Qty	Status	Action
01/10/2012 13:32	5281090-0	FILTER; FILTER	A - BM-A	1	ORDERED	
01/10/2012 13:30	P-1000-0	OIL FILTER; OIL FI				
12/09/2011 13:09	P-1002-0	GASKET; GASKET				

Purchase order information for: 5281090 - 0

Purchase Order ID:	1000-2011-0000009
Status:	OPEN
Ordered By:	1000-11 - MARY SMITH
Vendor:	1000 - NAPA CAR AND PARTS
Date Ordered:	01/10/2012 13:33
Date Expected:	

- Continue to the following sections for information on canceling part requests and returning issued parts.

Cancel Part Requests

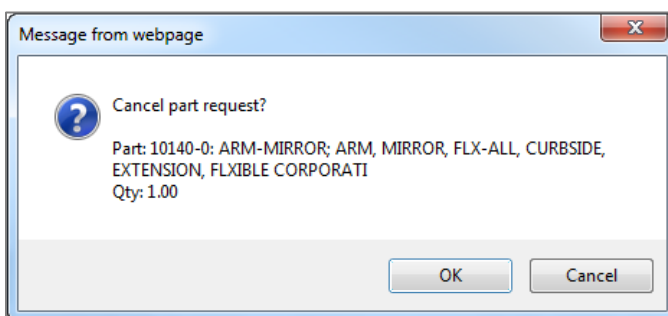
To cancel part requests:

- In the **Parts Requested** section of the **Parts History** pop-in, click the **Cancel** button to cancel a pending part request.

Parts Requested									
Date	Part ID	Description	Status	Qty	Task	Priority ID	Action	Request	
12/15/2014 01:38 PM	10140-0	ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI	PENDING	1	002-103 - ENGINE - OIL HOSE / LINE		Cancel	476199	
12/15/2014 01:37 PM	10016-0	STOP-DOOR; STOP, DOOR, FLX-ALL, TAILGATE, 1-1/2 INCH X 1/4 INCH, FLXIBL	PENDING	1	002-103 - ENGINE - OIL HOSE / LINE	A2	Cancel	476197	

A dialog box displays to verify that you want to cancel the part request.

- Click **OK** to cancel the Part Request.



You are returned to the Parts History pop-in and the part request no longer appears in the Parts Requested section.

Return Issued Parts

Depending on your organization, issued part returns may require approval.

Return Issued Parts (No Approval Required)

To return issued (posted) parts to inventory where approval is not required:

1. On the **Parts History** Pop-in, click the + or **Expand All** button to see the issued parts details.

Parts History - ACLOC1-2014.4

Part	Task	Net Qty
10140 -0: ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI	003-000 - TROUBLESHOOT FUEL SYSTEM	5

Expand All Collapse All

2. Click the **Return** button for the part to return.

Parts Posted

Part	Task	Net Qty
10140 -0: ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI	003-000 - TROUBLESHOOT FUEL SYSTEM	5

Return

Issue Qty: 2.00 EACH
Issue Location: ACLOC1
Date Posted: 08/03/2015 12:38 PM
Employee: EMP-AC
WAC:
Position:

Return

Issue Qty: 2.00 EACH
Issue Location: ACLOC1
Date Posted: 08/03/2015 12:36 PM
Employee: EMP-AC
WAC:
Position:

Qty Returned	Date	Employee	Status	Reason
--------------	------	----------	--------	--------

You are taken to the Return Issued Part pop-in.

Return issued part

Task: 003-000 - FUEL SYSTEM - TROUBLESHOOT FUEL SYSTEM

Part: 10140-0: ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI

Quantity Issued: 2.00
NFI: N
Issue Location: ACLOC1 - CARTWRIGHT HEAVY EQUIPMENT
Comments:

Quantity Returned: 0
Unit Price: \$10.9678
Employee: AC - ANTHONY CARTWRIGHT

Qty to return: 2.00
Reason:
Date: 08/02/2015 10:00 AM

Cancel Submit Request

3. Enter the quantity to return and the reason for the return. The date fills automatically according to the issue date, but you can manually change the date if needed.

- Click the **Return Part** button to complete the return.

You are returned to the Work Order Parts Actions History page where, upon expanding the view, you can see the returned part transaction information.

Return Issued Parts (with Approval Required)

To return issued (posted) parts to inventory where approval is required:

- On the Parts History pop-in, click the + or the **Expand All** button.

Parts History - ACLOC1-2014.4			
Parts Posted			
	Part	Task	Net Qty
+	10140 -0: ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI	003-000 - TROUBLESHOOT FUEL SYSTEM	5

Expand All Collapse All

- Click the **Return** button for the posted part you wish to return.

Parts Posted			
	Part	Task	Net Qty
+	10140 -0: ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI	003-000 - TROUBLESHOOT FUEL SYSTEM	5

Return

Issue Qty: 2.00 EACH Date Posted: 08/03/2015 12:38 PM WAC: Employee: EMP-AC Position: Issue Location: ACLOC1

Return

Issue Qty: 2.00 EACH Date Posted: 08/03/2015 12:36 PM WAC: Employee: EMP-AC Position: Issue Location: ACLOC1

Qty Returned	Date	Employee	Status	Reason
--------------	------	----------	--------	--------

You are taken to the Request Part Return page.

Return issued part

Task: 003-000 - FUEL SYSTEM - TROUBLESHOOT FUEL SYSTEM

Part: 10140-0: ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI

Quantity Issued: 2.00 Quantity Returned: 0

NFI: N Unit Price: \$10.9678

Issue Location: ACLOC1 - CARTWRIGHT HEAVY EQUIPMENT Employee: AC - ANTHONY CARTWRIGHT

Comments:

Qty to return: 2.00

Reason:

Date: 08/02/2015 10:00 AM

Cancel Submit Request

- Enter the quantity to return and the reason for the return. The date fills automatically according to the issue date, but you can manually change the date if needed.

- Click the **Submit Request** button to complete the return.

You are returned to the Parts History pop-in where you see there is a pending part return (as indicated by the asterisk).



	Part	Task	Net Qty
☒	10140 -0: ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI	003-000 - TROUBLESHOOT FUEL SYSTEM	1 (-1*)

Expand All Collapse All

*Part return(s) pending.

- Expand the view to see the returned part transaction information with the part returns pending approval.

Upon supervisor approval, the Parts Posted history reflects the approved request as indicated in the screenshot below.



	Part	Task	Net Qty
☒	10140 -0: ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI	003-000 - TROUBLESHOOT FUEL SYSTEM	5

Qty Returned	Date	Employee	Status	Reason
1	02/07/2011 11:50 AM	MOLLYT	APPROVED	wrong part

- Click the **X** or **Cancel** button to go back to the Post Work Order Parts pop-in.

17. Serial Numbers Page

Click the **Serial Numbers** button on the Work Order Main page for Part Rebuilds to display the Serial Numbers page.

Work Order			
Part ID	RGPART001-1 - MOTOR- WIPER- FLX-ALL- WINDSHIELD- CURBSIDE- HAUSMAN BUS SA		
Work Order ID	RGLOCS-2013-531	Job Status	OPEN
Title		Job Type	INV REBUILD
Restock Location	RGLOCS- RG LOCATION S	Rebuild Quantity	1
Unit In	11/07/2013 04:55 PM	Due	11/08/2013 12:55 AM
Work Completion	0 / 4 (0.00%)	Hours Completion	7.62 / 4.00 (190.50%)
Projected Completion Date	INSUFFICIENT DATA		

Serial Numbers 1			
#	Completed?	Serial No	Comments
1	N	123	CC

Save Changes

Add Serial No	
Serial No	
Comments	
Add	

Back

To add a serial number:

1. Enter the serial number (or select a serial number from the **Search** box) and a comment, if desired.
2. Click the **Save Changes** button to add the serial number to the part.

Serial Numbers 1			
#	Completed?	Serial No	Comments
1	N	567	CC

Save Changes

Add Serial No	
Serial No	
Comments	
Add	

A message displays to indicate a successful update.

Projected Completion Date	INSUFFICIENT DATA
 Successful update.	

Serial Numbers 1			
#	Completed?	Serial No	Comments
1	N	567	CC

18. Work Order Part Release/Completion Page

The Work Order Part Release/Completion page displays when you click the **Completion** button on the Work Order Main page for part rebuilds. This page is only to be used in rare situations where some parts are needed to be released to inventory as soon as possible.

Work Order			
Part ID	RGPART001-1 - MOTOR- WIPER- FLX-ALL- WINDSHIELD- CURBSIDE- HAUSMAN BUS SA		
Work Order ID	RGLOCS-2013-531 	Job Status	OPEN
Title		Job Type	INV REBUILD
Restock Location	RGLOCS - RG LOCATION S	Rebuild Quantity	1
Unit In	11/07/2013 04:55 PM	Due	11/08/2013 12:55 AM
Work Completion	0 / 4 (0.00%)	Hours Completion	7.62 / 4.00 (190.50%)
Projected Completion Date	INSUFFICIENT DATA		

Completion History		
Completion Date	Qty Completed	Serial No
11/07/2013 12:00 AM	1	123

Part Release / Completion	
Date Released	10/05/2016 09:36 AM 
Qty	
Serial No	

Work Order Part Release/Completion Page

➡ Complete the fields and click **Save** to release parts to inventory.

The Completion History is listed and a message indicates the successful update.

Completion History		
Completion Date	Qty Completed	Serial No
11/07/2013 12:00 AM	1	123
10/05/2016 09:36 AM	0	56

 **Successful update.**

Part Release / Completion	
Date Released	10/05/2016 09:37 AM 
Qty	
Serial No	

19. Transfer/Defer in Shop Activity

Shop Activity supports service request deferral and work order deferral/transfer. Refer to the following sections for information about how to defer a service request and transfer/defer a work order.

Defer a Service Request

To be able to defer a service request, you must have the correct access rights. Your administrator can set these deferral options in the Technician Portal settings to enable users to defer service requests. There must be a service request assigned to an open work order, and there must be a posting to the work order, or you must be jobbed on to the work order to show the Defer button.

To defer a service request:

1. On the Service Request/Defect page, complete the desired fields and click **Defer**.

Service Request / Defect

Asset ID	SRV-CAR01: 100-JGC-1987 2006 JEEP GC-SRV01 LT KHAKI JEEP GRAND CHEROKEE		
Asset Number	SRV-ASSET001	Station Location	1 - OPS
License Number	SPOKAN01	Repair Location	1 - OPS
Operator Name	SRV - SARAH VICKERS		
Work Order ID	1-2016-44	Job Status	OPEN
Title	SRV SCHEDULE TESTER	Job Type	PM
PM Service	TH-PM-SERV-1 - TONYA'S PM SERVICE FOR EXCEPTION BASE PM CHECKLIST	PM Scheduled	02/17/2017
Unit In	09/27/2016 02:20 PM	Due	09/28/2016 02:20 PM
Service Status	DOWN - DOWN FOR SERVICE	Meter 1	80100 MILES
Meter 2	80200 HOURS (EQ UPD)	Work Completion	0 / 3 (0.00%)
Hours Completion	0.52	Projected Completion Date	01/05/2017 03:11 PM
Contact	SARAH VICKERS		
Service Request ID	SRV-CAR01-3020450	Incident ID	0
SR Symptom	OIL AND FLUIDS - OIL AND FLUIDS		
SR Task	000-800 - PM TASKS - VEHICLE INSPECTION - SEE NOTES		

Basic Information

Location

KEV-SS

KEVINS SHOP SCHEDULING LOCATIO

Reporting Source

Operator ID

Name

Phone Number

Email Address

Symptom

OIL AND FLUIDS

OIL AND FLUIDS

Fail / Cause Code

WAC

Correction Performed

Condition rating

Task ID

000-800

VEHICLE INSPECTION - SEE NOTES

Back

Save

Defer

The Transfer/Defer Repairs from Work Order page displays.

2. Select the desired Items to defer, add notes if desired, and click **Save**.

Be patient as the deferral process may take several seconds to complete.

Transfer/Defer Repairs from Work Order			
Asset ID	SRV-CAR01: 100-JGC-1987 2006 JEEP GC-SRV01 LT KHAKI JEEP GRAND CHEROKEE		
Asset Number	SRV-ASSET001	Station Location	1 - OPS
License Number	SPOKAN01	Repair Location	1 - OPS
Operator Name	SRV - SARAH VICKERS		
Work Order ID	1-2016-44	Job Status	OPEN
Title	SRV SCHEDULE TESTER	Job Type	PM
PM Service	TH-PM-SERV-1 - TONYA'S PM SERVICE FOR EXCEPTION BASE PM CHECKLIST	PM Scheduled	02/17/2017
Unit In	09/27/2016 02:20 PM	Due	09/28/2016 02:20 PM
Service Status	DOWN - DOWN FOR SERVICE	Meter 1	80100 MILES
Meter 2	80200 HOURS (EQ UPD)	Work Completion	0 / 3 (0.00%)
Hours Completion	0.50	Projected Completion Date	10/05/2016 10:39 AM
Contact	SARAH VICKERS		
Service Request ID	SRV-CAR01-3020450	Incident ID	0
SR Symptom	OIL AND FLUIDS - OIL AND FLUIDS		
SR Task	000-800 - PM TASKS - VEHICLE INSPECTION - SEE NOTES		

Transfer/Defer Items	
☒ Symptom: OIL AND FLUIDS OIL AND FLUIDS	Description:
☒ SR Task: 000-800 - VEHICLE INSPECTION - SEE NOTES	
☒ Task: 000-800 - VEHICLE INSPECTION - SEE NOTES	WAC:

Notes
DEFERRING FOR LACK OF RESOURCES

(This transaction could take several minutes to complete.)

*When you click **Save**, several events occur to defer the service request:*

- The WAC is changed to DEF (deferred).
 - The original service request is still on the work order because labor had been previously posted to it.
 - A note is placed on the Service Request/Defect page to indicate the service request was deferred to a new service request number.
3. Click the **+** to display the tasks on the service request where you will see the WAC code is now set to the deferred code.

Service Requests / Defects: 1

Code - Description		WAC	Remaining Hours
☐ Select	Symptom: OIL AND FLUIDS - OIL AND FLUIDS Task: 000-800 - VEHICLE INSPECTION - S ...		
☒ Start	000-800 - PM TASKS - VEHICLE INSPECTION - SEE NOTES	06	-0.50

Add / Manage

4. Click the red task link at the task level to go to the Work Order Task page.

Service Requests / Defects: 1

Code - Description		WAC	Remaining Hours
☐ Select	Symptom: OIL AND FLUIDS - OIL AND FLUIDS Task: 000-800 - VEHICLE INSPECTION - S ...		
☒ Start	000-800 - PM TASKS - VEHICLE INSPECTION - SEE NOTES	06	-0.50

Add / Manage

On this page, you will notice the WAC is now the deferred code (deferred) since it was deferred.

Update Task Fields

WAC ... DEFERRED

☐ Final Status

Work Class ...

Warranty Work ▾

Repair Reason ... NOTED IN PM

Account ID ... SRV ACCOUNT TEST

Priority ID ... PRIORITY CODE FOR TESTING

Estimated Hours

Equipment Warranty ☐

Warranty Vendor ID ...

Location ▾

No Parts Needed ☐

Date and time completed

Comment

Procedure Information SEE WORK ORDER NOTES FOR SPECIFIC INSPECTION REQUIREMENTS

5. Click **Back** to go back to the Work Order Main page. On that page, click **Add/Manage** to go to the Work Order Service Requests page.

Service Requests / Defects: 1				
Code - Description				
	Select	Symptom: OIL AND FLUIDS - OIL AND FLUIDS Task: 000-800 - VEHICLE INSPECTION - S...		
Task			WAC	Remaining Hours
	Start	000-800 - PM TASKS - VEHICLE INSPECTION - SEE NOTES	06	-0.50
Add / Manage				

The new, unassigned service request displays.

Unassigned Service Requests: 2						
☐	Task	Symptom	Repair Reason	Entered When	Entered By	Priority
☐	000-800 - VEHICLE INSPECTION - SEE NOTES	OIL AND FLUIDS - OIL AND FLUIDS		10/05/2016 10:42 AM	SRV	1
No Comment						
Assign Checked SRs						

6. Click **Back** to go back to the Work Order Main page. From there, click the red code link at the service request level to open the Service Request/Defect page.

Service Requests / Defects: 1	
Code - Description	
	Select Symptom: OIL AND FLUIDS - OIL AND FLUIDS Task: 000-800 - VEHICLE INSPECTION - S...

The Service Request/Defect page displays.

7. In the **Notes and Comments** area, a note indicates the service request was deferred to a new service request number.

Notes and Comments
Notes -- 10/05/2016 10:48 AM - SRV - SARAH VICKERS -- SR DEFERRED TO SR SRV-CAR01-3020462. ----

Transfer/Defer Work on Work Order Details Page

To transfer/defer work, follow the instructions below.

➡ Click the Transfer/Defer Work button on the Work Order Details page.

The screenshot shows the 'Notes' section at the top with a 'New Note' button. Below this is a navigation bar with five buttons: 'Back', 'Assignments', 'Finish Work Order', 'Close Work Order', and 'Transfer/Defer Work'. The 'Transfer/Defer Work' button is circled in red.

The Transfer/Defer Repairs page displays.

Defer to a New Work Order

To defer to a new work order at this location, or to transfer to a new work order at a specific location, follow the instructions below. Skip to the [Transfer/Defer to an Existing Work Order](#) section below to learn how to transfer/defer to an existing work order.

1. Select the appropriate radio or **Select** button and click **Continue**. (If transferring to a new work order at another location, select the location from the drop-down box prior to clicking **Continue**.)

The screenshot shows the 'Transfer/Defer Repairs from Work Order 1-2016-44' page. It has two radio buttons: 'Defer to new Work Order at this location' (selected) and 'Transfer to new Work Order at' (with a dropdown menu showing 'AKT 1-1 - AKT SPACE 1-1 "" 1'). Below these is a section 'Or Transfer/Defer to existing Work Order' containing a table with columns: Work Order ID, Status, Service Status, Repair Reason, Priority, and Datetime In. The first row of the table has a 'Select' button in the first column. Below the table is a 'Continue' button, which is circled in red.

	Work Order ID	Status	Service Status	Repair Reason	Priority	Datetime In
Select	1-2016-41	OPEN	DOWN - DOWN FOR SERVICE	A - ACCIDENT	R1 - PRIORITY CODE FOR TESTING	08/18/2016 03:11 PM

The Transfer/Defer Repairs from a work order to a New Work Order page displays.

New Work Order 1-2016-46

Title

Job Type PM

Equipment ID SRV-CAR01 JEEP GRAND CHEROKEE
2006 JEEP GC-SRV01, METERS: 1-80100 MILES; 2-80200 HOURS

Work Details

Messages

OTHER OPEN WORK ORDERS

WORK ORDER NUMBER	TYPE	STATUS	SCHEDULED	REASON	SERVICE
1-2016-41	REPAIR	OPEN	09/27/2016 12:30	A	
1-2016-44	PM	OPEN			TH-PM-SERV-1

UNIT IS OVERDUE 75100 LIFE MILES ON METER 1 FOR SERVICE TH-PM-SERV-1
- LIFE METER 1 DUE AT 5000

Meter1 Meter1 Validation

Meter2 Meter2 Validation

Repair reason ID ...

Work Class ...

Services and Inspections Due: 1

Add to Work Order	Service / Inspection due	Reason	Date due	Days Until Due	Days late	Meter 1 until due	Meter 2 until due
☐	TH-PM-SERV-1 - TONYA'S PM SERVICE FOR EXCEPTION BASE PM CHECKLIST	METER OR FUEL OVERRIDE	02/17/2017	135	0	(75100)	0

Service Status DOWN ... DOWN FOR SERVICE

Date and Time In 10/05/2016 11:10 AM

- Complete the new work order information as desired and click **Save**.

The Transfer/Defer Items page displays.

- Select the specific items to transfer/defer and click **Save**.

This transaction may take several seconds to complete.

Transfer/Defer Repairs from Work Order 1-2016-44

Asset ID	SRV-CAR01: 100-JGC-1987 2006 JEEP GC-SRV01 LT KHAKI JEEP GRAND CHEROKEE		
Asset Number	SRV-ASSET001	Station Location	1 - OPS
License Number	SPOKAN01	Repair Location	1 - OPS
Operator Name	SRV - SARAH VICKERS		
Work Order ID	1-2016-44	Job Status	OPEN
Title	SRV SCHEDULE TESTER	Job Type	PM
PM Service	TH-PM-SERV-1 - TONYA'S PM SERVICE FOR EXCEPTION BASE PM CHECKLIST		
Unit In	09/27/2016 02:20 PM	PM Scheduled	02/17/2017
Service Status	DOWN - DOWN FOR SERVICE	Due	09/28/2016 02:20 PM
Meter 2	80200 HOURS (EQ UPD)	Meter 1	80100 MILES
Hours Completion	0.50	Work Completion	0 / 3 (0.00%)
Contact	SARAH VICKERS	Projected Completion Date	10/05/2016 11:12 AM

Transfer/Defer Items to Work Order 1-2016-46

☒ Symptom	Description:
☒ SR Task: 000-800 - VEHICLE INSPECTION - SEE NOTES	
☒ Task: 000-800 - VEHICLE INSPECTION - SEE NOTES	WAC: 06

(This transaction could take several minutes to complete.)

You are returned to the Work Order Main page after a successful transfer/deferral.

Transfer/Defer to an Existing Work Order

To transfer/defer to an existing work order:

1. Click the **Select** button for the existing work order.

Transfer/Defer Repairs from Work Order 1-2016-44

☒ Defer to new Work Order at this location
☐ Transfer to new Work Order at: AKT 1-1 - AKT SPACE 1-1 "" 1

Or Transfer/Defer to existing Work Order

	Work Order ID	Status	Service Status	Repair Reason	Priority	Datetime
Select	1-2016-41	OPEN	DOWN - DOWN FOR SERVICE	A - ACCIDENT	R1 - PRIORITY CODE FOR TESTING	08/18/2016 03:11

Continue

The Transfer/Defer Items to Work Order page displays.

2. Select the items to transfer/defer and click **Save**.

Transfer/Defer Repairs from Work Order 1-2016-44

Asset ID: **SRV-CAR01: 100-JGC-1987 2006 JEEP GC-SRV01 LT KHAKI JEEP GRAND CHEROKEE**

Asset Number: SRV-ASSET001 Station Location: 1 - OPS

License Number: SPOKAN01 Repair Location: 1 - OPS

Operator Name: SRV - SARAH VICKERS

Work Order ID: **1-2016-44** Job Status: OPEN

Title: SRV SCHEDULE TESTER Job Type: PM

PM Service: TH-PM-SERV-1 - TONYA'S PM SERVICE FOR EXCEPTION BASE PM CHECKLIST PM Scheduled: 02/17/2017

Unit In: 09/27/2016 02:20 PM Due: 09/28/2016 02:20 PM

Service Status: DOWN - DOWN FOR SERVICE Meter 1: 80100 MILES

Meter 2: 80200 HOURS (EQ UPD) Work Completion: 0 / 3 (0.00%)

Hours Completion: 0.50 Projected Completion Date: 10/05/2016 11:16 AM

Contact: SARAH VICKERS

Transfer/Defer Items to Work Order 1-2016-46

Item	Description
☒ Symptom: OIL AND FLUIDS OIL AND FLUIDS	
☒ SR Task: 000-800 - VEHICLE INSPECTION - SEE NOTES	
☒ Task: 000-800 - VEHICLE INSPECTION - SEE NOTES	WAC: 06

Back **Save** (This transaction could take several minutes to complete.)

After successful transfer/deferral, you are returned to the Work Order Main page.

20. Work Order Test Results Pop-in

Following is an overview of how to use the Test Results pop-in to begin new tests, edit existing tests, and add files, URLs, and report links to tests and test elements.

Click the **Test Results** button on the Work Order Main and Work Order Details pages or click the **Test Details** button on the Work Order Details page to go to the Test Results pop-in.

Work Order Main																										
Asset ID	CNCAR018: SNCAR018 2012 FORD F150 CAR 018			Tech ID	Tech Name																					
Life Meter 1	300 MILES	Station Location	CNLOC1 - REPAIR SHOP 1	No employees currently working																						
Repair Location	CNLOC1 - REPAIR SHOP 1																									
Work Order ID	CNLOC3-2013-1	Job Status	OPEN																							
Job Type	REPAIR	Unit In	05/06/2013 16:33																							
Due	05/07/2013 16:33	Meter 1	100 MILES																							
Hours Completed	0.03 / 0.03 (100.00%)	Tasks Completed	0 / 1 (0.00%)																							
Projected Completion Date	10/21/2015 13:01																									
Tasks: 1 <table border="1"> <thead> <tr> <th>Task ID</th> <th>WAC</th> <th>Remaining Hours</th> </tr> </thead> <tbody> <tr> <td>GNMTASK1 - GNM REPAIR GROUP - GNM TASK1 DESC</td> <td></td> <td>-0.03</td> </tr> </tbody> </table> Actions <table border="1"> <tbody> <tr> <td>Main Page</td> <td>Start Delay</td> <td>View/Edit Detail</td> </tr> <tr> <td>Finish Work Order</td> <td>Part Actions</td> <td>Notes</td> </tr> <tr> <td>Equipment History</td> <td>Test Results</td> <td>Related Files</td> </tr> <tr> <td>Messages</td> <td>Print Work Order</td> <td>Component Warranty</td> </tr> <tr> <td>Commercial Work</td> <td>Postings</td> <td>Relationships</td> </tr> </tbody> </table>						Task ID	WAC	Remaining Hours	GNMTASK1 - GNM REPAIR GROUP - GNM TASK1 DESC		-0.03	Main Page	Start Delay	View/Edit Detail	Finish Work Order	Part Actions	Notes	Equipment History	Test Results	Related Files	Messages	Print Work Order	Component Warranty	Commercial Work	Postings	Relationships
Task ID	WAC	Remaining Hours																								
GNMTASK1 - GNM REPAIR GROUP - GNM TASK1 DESC		-0.03																								
Main Page	Start Delay	View/Edit Detail																								
Finish Work Order	Part Actions	Notes																								
Equipment History	Test Results	Related Files																								
Messages	Print Work Order	Component Warranty																								
Commercial Work	Postings	Relationships																								

Work Order Main Page Test Results Button

Work Order Details																	
Asset ID	CNCAR018: SNCAR018 2012 FORD F150 CAR 018			Messages													
Life Meter 1	300 MILES	Station Location	CNLOC1 - REPAIR SHOP 1	Equipment History													
Repair Location	CNLOC1 - REPAIR SHOP 1			Print Work Order													
Work Order ID	CNLOC3-2013-1	Job Status	OPEN	Start Delay													
Job Type	REPAIR	Unit In	05/06/2013 16:33	Notes													
Due	05/07/2013 16:33	Meter 1	100 MILES	Edit Basic Info													
Hours Completed	0.03 / 0.03 (100.00%)	Tasks Completed	0 / 1 (0.00%)	Relationships													
Projected Completion Date	10/21/2015 13:01			Files													
Repair Reason ID	J - OTHER	Work Class		Test Results													
Account ID	CNACCT0001 - UNIT ACCOUNT 0001	Parking Stall		Equipment Usage													
Priority ID	3 - ROUTINE	Reference Order ID		Crew Time Entry													
Contact Name		Phone		Add / Manage SRs													
				Work Order Tasks													
				New Job													
Summary Cost Info <table border="1"> <thead> <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>0.03</td> <td>0.65</td> <td>0.00</td> <td>0.00</td> <td>0.00</td> <td>0.65</td> </tr> </tbody> </table>						Labor Hours	Labor Cost	Parts Cost	Commercial Cost	Equipment Cost	Total Cost	0.03	0.65	0.00	0.00	0.00	0.65
Labor Hours	Labor Cost	Parts Cost	Commercial Cost	Equipment Cost	Total Cost												
0.03	0.65	0.00	0.00	0.00	0.65												

Work Order Details Test Results Button

Tests Performed				
Test Details				
Test ID	Test Type ID	Test Type Description	Started	Result
350887	CN-TEST-TYPE-005	TEST 005	07/24/2014 15:36	PENDING

Work Order Details Test Details Button

The Test Results pop-in displays.

CNLOC3-2013-1 Test Results

Existing Test Results: 1

Test	Description	Group ID	Started	Status	Approved and Closed
CN-TEST-TYPE-005	TEST 005	N/A	07/24/2014 15:36	PENDING	N

New Test

Start a New Test:
RGTEST3
Start

Close

This pop-in lists existing tests for the work order (if any) and allows you to view/edit existing tests and start new tests. If existing tests are listed, clicking on a **Test** button takes you to the Test Result Details Test Elements Summary page (as outlined in the [Review and Update Existing Test Results](#) section). Otherwise, to begin a new test, follow the instructions in the next section, [Start a New Test](#).

Start a New Test

To begin a new test:

1. Select a test from the **Start a New Test** drop-down list and click the **Start** button as shown below.

CNLOC3-2013-1 Test Results

Existing Test Results: 1

Test	Description	Group ID	Started	Status	Approved and Closed
CN-TEST-TYPE-005	TEST 005	N/A	07/24/2014 15:36	PENDING	N

New Test

Start a New Test: RGTEST3 Start

Close

The Test Result Details Test Elements Entry pop-in displays.

Test Result Details

Basic Info

Test ID: 353814 Test Type: RGTEST3

Test Due: 10/21/2015 13:05

Status: IN PROGRESS

Approved and Closed: ☐ 10/21/2015 13:05

Testing certificate number:

Vendor ID: ... Vendor invoice:

Meter 1: 300 Meter 1 Validation:

Test Elements Entry

KV RATING

Comments:

Result: Result

Not Performed: ☐

Files: Files *Required

KG TE

Comments:

Result: Result

Not Performed: ☐

Files: Files

RG TEST ELEMENT

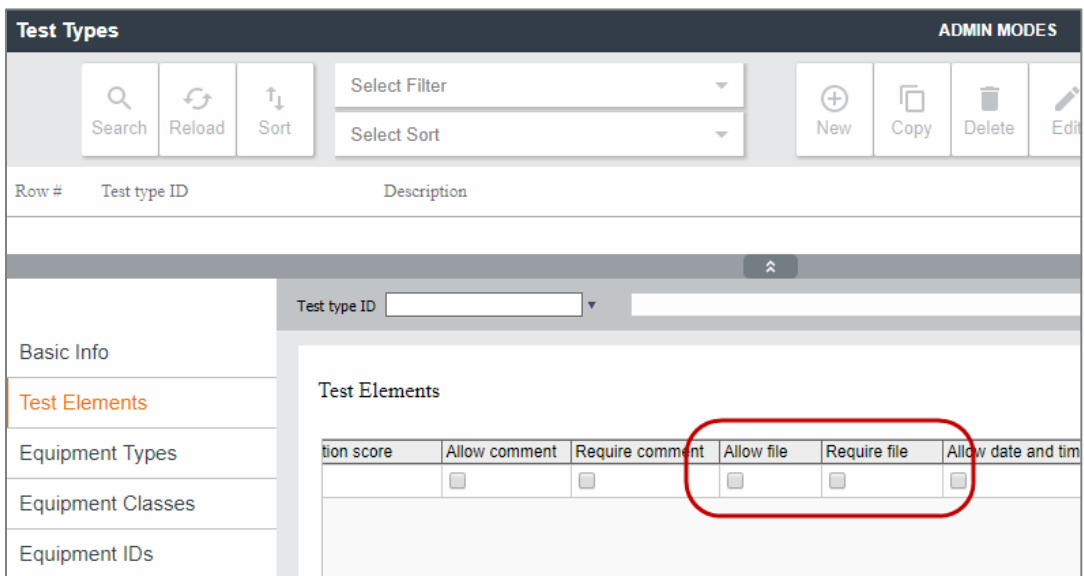
Not Performed: ☐

Cancel Save & Close

 **Note:** The Test Elements Entry page will vary in appearance based on the Test and options you have chosen for the test types and test elements.

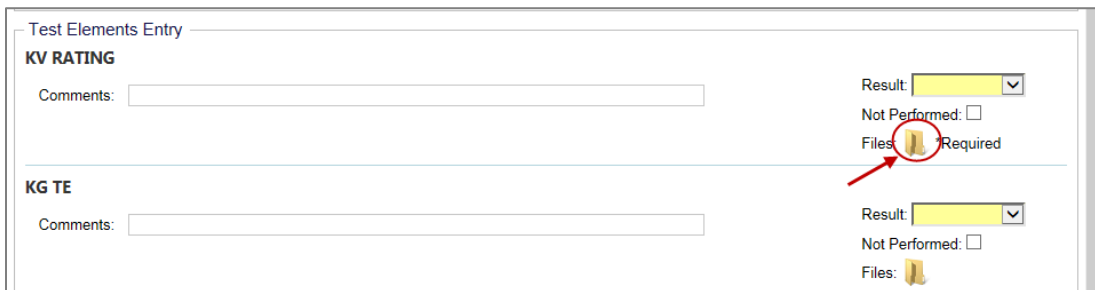
2. Enter data for each test element.

 **Note:** Depending on configuration, files may be allowed or required to pass the test. If set to allow or require files, the **Files**  icon will display on the Test Elements Entry page. Test elements are set to **Allow file** or **Require file** on the Equipment Activity Test Types screen, Test Elements tab as shown in the screenshot below.



The screenshot shows the 'Test Types' interface with the 'Test Elements' tab selected. A table lists test elements with columns for 'Allow comment', 'Require comment', 'Allow file', 'Require file', and 'Allow date and time'. A red circle highlights the 'Allow file' and 'Require file' checkboxes for a specific test element.

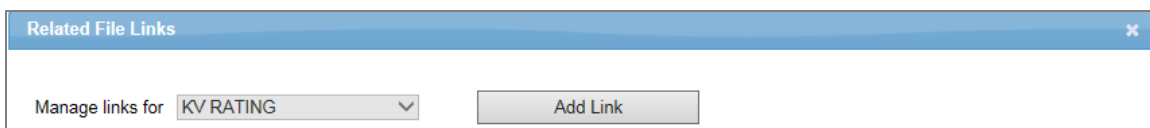
- In this example, the KV Rating Element requires a file while the KG TE Element allows a file to be uploaded if desired. To add a file as required for the KV Rating Element, click the **Files**  * **Required** icon.



The screenshot shows the 'Test Elements Entry' page with two sections: 'KV RATING' and 'KG TE'. Each section has a 'Comments' field, a 'Result' dropdown, a 'Not Performed' checkbox, and a 'Files' icon. A red circle highlights the 'Files' icon for the 'KV RATING' section, with a red arrow pointing to it.

The Related File Links dialog displays.

 For additional information about using the Related File Links and Add Link dialogs to upload files and add URL and report links, refer to the **Related Files** button information in the [Work Order Main page, Actions Tab](#) section above.



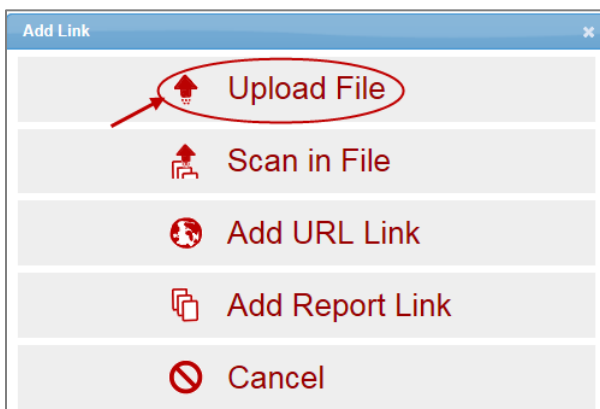
The screenshot shows the 'Related File Links' dialog box. It has a dropdown menu for 'Manage links for' set to 'KV RATING' and an 'Add Link' button.

4. The **Manage links for** drop-down selection is already grayed-out with the particular test element selected. Click the **Add Link** button.

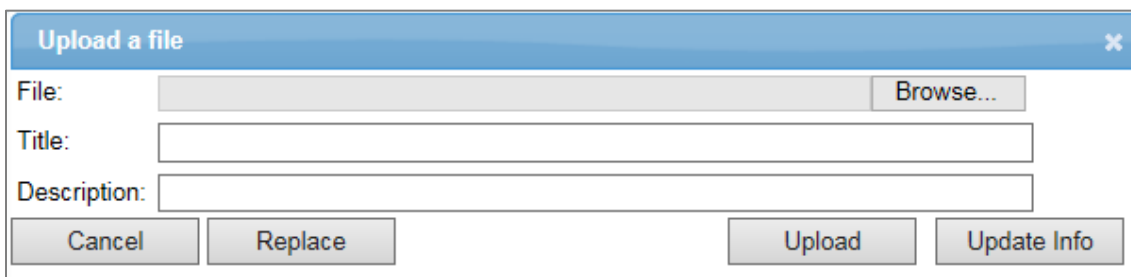


The Add Link dialog displays.

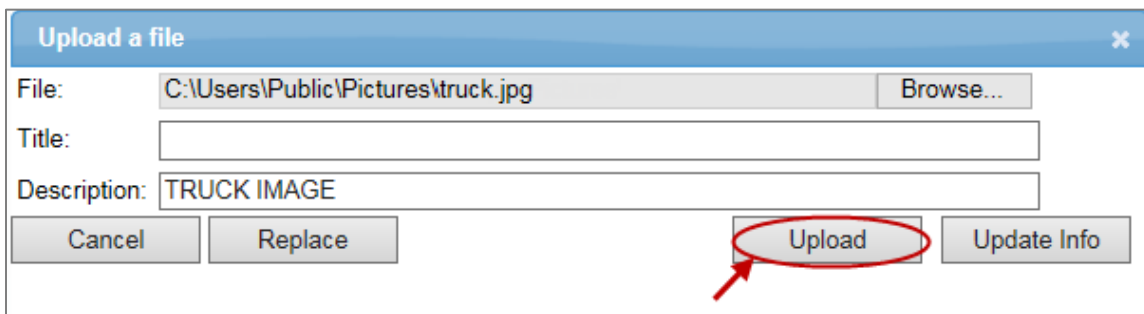
5. To upload a file, select **Upload File**.



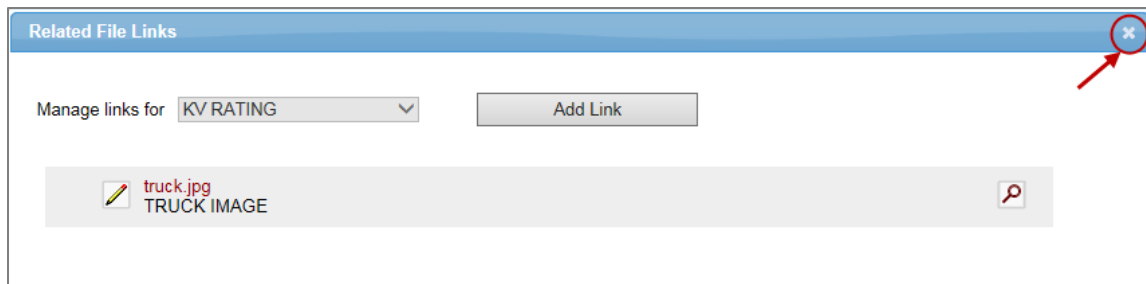
The Upload a file dialog displays.



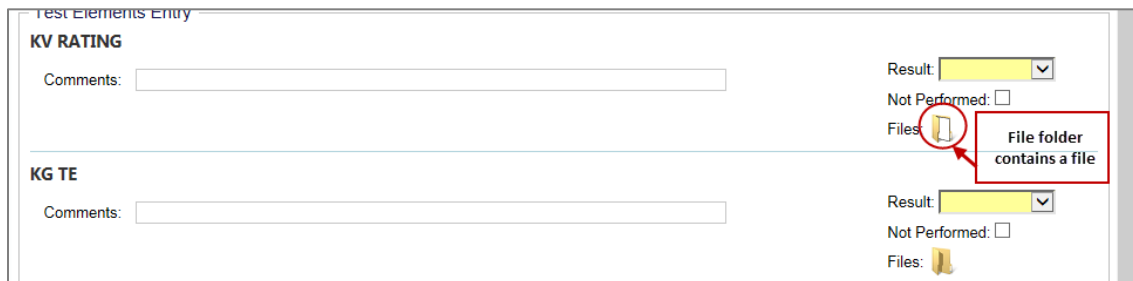
6. Complete the **File**, **Title**, and **Description** fields as desired and click **Upload**.



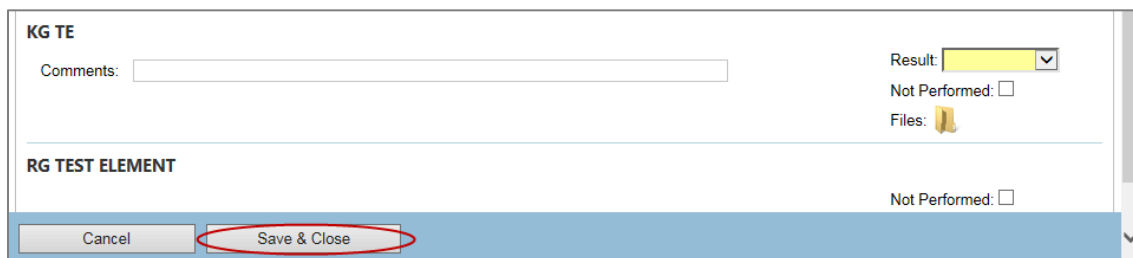
The Related File Links dialog displays the uploaded file. Click the X to close the Related File Links dialog.



You are returned to the Work Order Test Result Test Elements Entry page which displays a file folder that now contains a file.



7. Enter the test element information, then click **Save & Close**.



The Main Work Order Test Results page displays and the newly added test is listed in the Existing Test Results section.

Existing Test Results 2

Test	Description	Group ID	Started	Status	Approved and Closed
RGTEST3	RG TEST3	N/A	10/21/2015 13:05	IN PROGRESS	N
CN-TEST-TYPE-005	TEST 005	N/A	07/24/2014 15:36	PENDING	N

New Test

Start a New Test: RGTEST3

Start

Close

8. You may now choose to do one of the following options:

- i. Click the **Close** button to return to the page from which you originated.
- ii. Click the **Start** button to enter data for a new test (and repeat the steps outlined above).
- iii. Click the **Test** button (e.g., **RGTEST3**) to review and edit elements and add more information to the test as outlined in the following [Review and Update Existing Test Results](#) section.

Review and Update Existing Test Results

To edit an existing test, click the button for the desired test on the Main Work Order Test Results page as shown in the screenshot below. This allows you to review the summary information and add more information to the test.

Test	Description	Group ID	Started	Status	Approved and Closed
RGTEST3	RG TEST3	N/A	10/21/2015 13:05	IN PROGRESS	N
CN-TEST-TYPE-005	TEST 005	N/A	07/24/2014 15:36	PENDING	N

New Test

Start a New Test: RGTEST3 Start

Close

The Test Result Details pop-in displays.

- The appearance of this page varies based on the test. This page also displays upon clicking the **Test Result** link on the Finish Work Order page.

Test Result Details

Basic Info

Test ID: 353814 Test Type: RGTEST3

Test Due: 10/21/2015 13:05

Status: IN PROGRESS

Approved and Closed ☐

Testing certificate number: 435734170-11

Vendor ID: CNVENDOR001

Vendor invoice: 45147601

Meter 1: 300

Meter 1 Validation:

Edit Elements

Comments

Notes

Files

Test Elements Entry

KV RATING

Comments:

Result:

Not Performed: ☐

Files:

KG TE

Comments:

Result:

Not Performed: ☐

Files:

RG TEST ELEMENT

Not Performed: ☐

Cancel Save & Close

Prior to the test being completed, you may update basic information, edit elements, add comments and notes, and save your changes.

This page includes several sections including: Basic Info Section, Test Elements Summary Section, and the Function Buttons as outlined below.

Basic Info Section:

The Basic Info section shows the Test ID, Test Type, and Test Due information along the top of the section. The Test ID is a link to the Test Results screen. The Basic Info section allows you to enter various test information throughout the testing process.

Basic Info

Test ID: 353814 Test Type: RGTEST3

Test Due: 10/21/2015 13:05

Status: IN PROGRESS

Approved and Closed ☐

Testing certificate number: 435734170-11

Vendor ID: CNVENDOR001

Vendor invoice: 45147601

Meter 1: 300

Meter 1 Validation:

Edit Elements

Comments

Notes

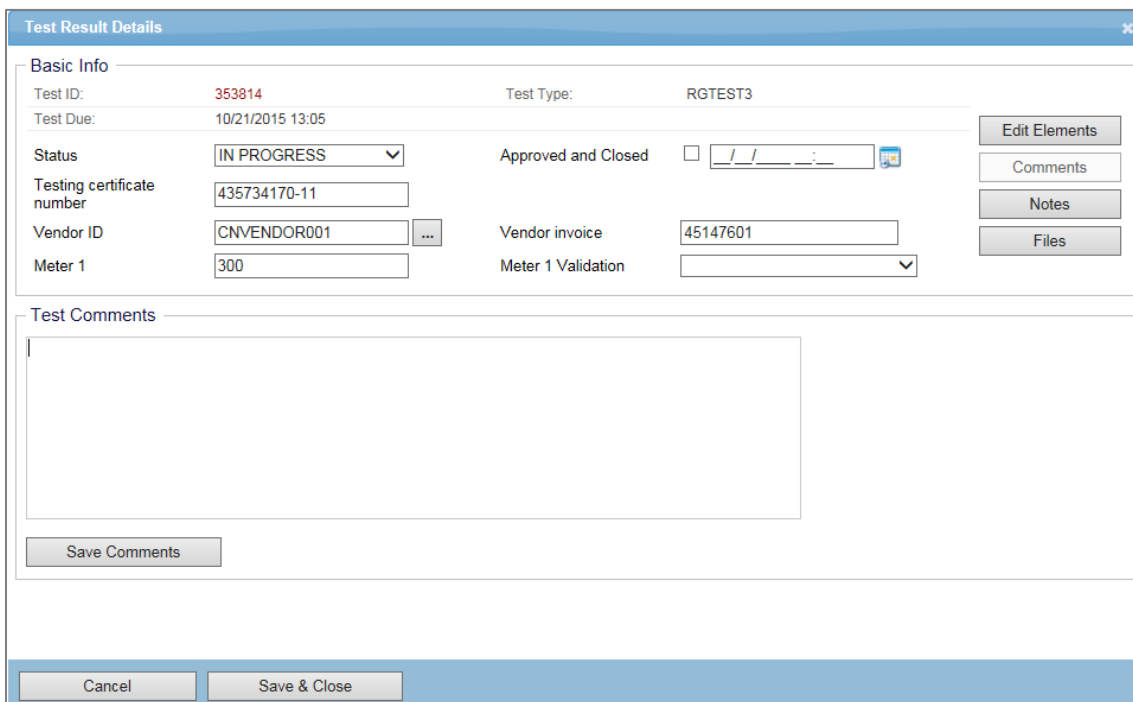
Files

1. Update the following basic information as desired:

- Status:** As the test status changes, select the appropriate test status from the drop-down list (PENDING, IN PROGRESS, PASS, PASS CORRECTED, FAILED, PERFORMED, and NOT PERFORMED).

- **Approved and Closed:** Select a date and time from the Date Picker  and check the box to indicate test approval and closure.
-  **Note:** The Work Order is officially closed when the user checks the Approved and Closed check box.
- **Testing certificate number:** Enter the test certificate number.
- **Vendor ID and Vendor invoice:** Enter a Vendor ID or click the search button to select a vendor from the list and enter the Vendor invoice number.
- **Meter 1 and Meter 1 Validation:** Enter the meter reading and select the validation from the drop-down list.
- **Comments:** Click the Comments button to add comments to the test.
NOTE: The Comments button is highlighted if comments already exist for the test.

The Test Result Details Comments dialog displays:



Test Result Details

Basic Info

Test ID: 353814 Test Type: RGTEST3

Test Due: 10/21/2015 13:05

Status: IN PROGRESS

Approved and Closed: ☐ 

Testing certificate number: 435734170-11

Vendor ID: CNVENDOR001 ...

Vendor invoice: 45147601

Meter 1: 300

Meter 1 Validation:

Test Comments

Save Comments

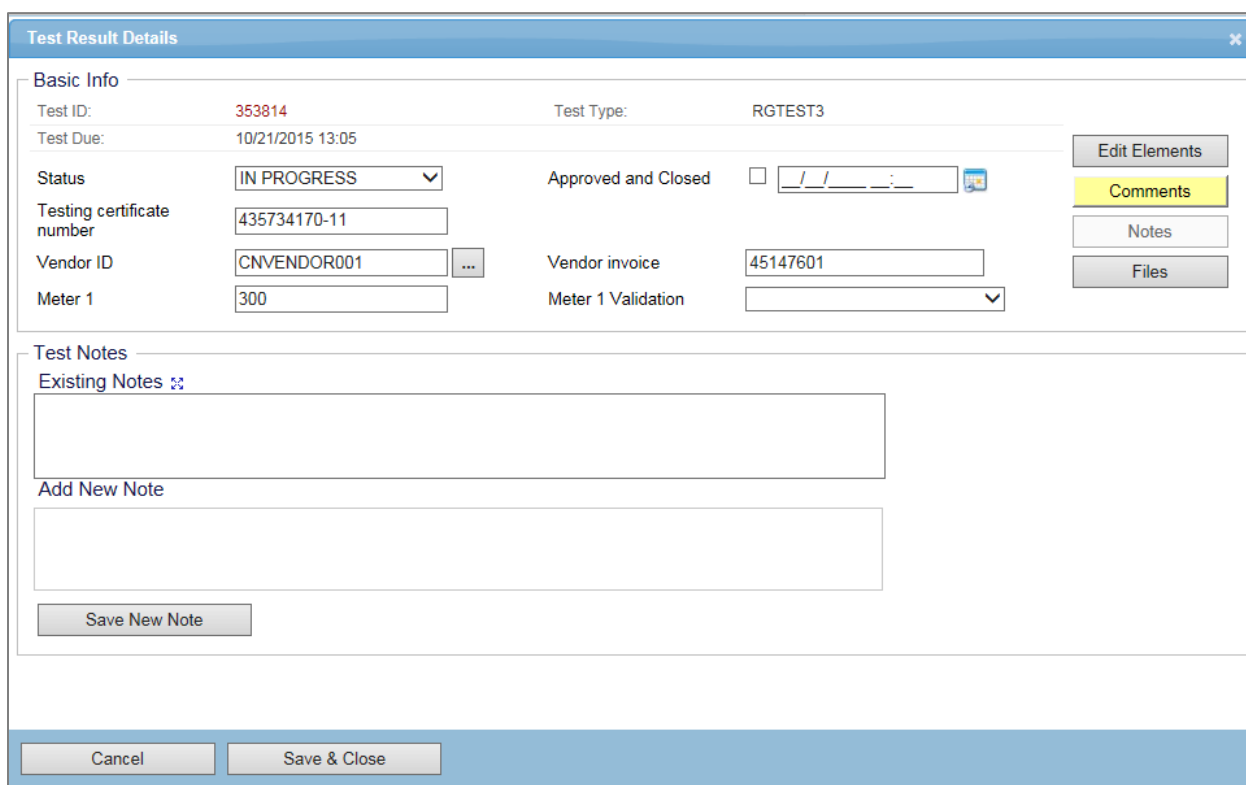
Cancel Save & Close

2. Enter a comment in the Test Comments area and click one of the following buttons:
 - Click the **Save Comments** button to save the comment and return to the Test Result Test Details page where the **Comments** button will now be highlighted

- Click the **Save & Close** button to return to the Test Result Existing Test Results page
 - Click the **Cancel** button to return to the previous page without saving the comment.
3. Click the **Notes** button to add notes to the test.

 Note: The **Notes** button is highlighted if notes already exist for the test.

The Test Result Details page displays Test Notes to allow review of existing notes and add new notes to the test:

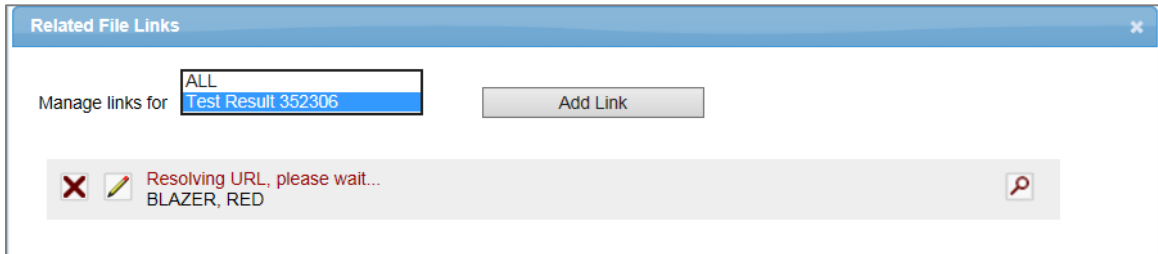


The screenshot shows the 'Test Result Details' window. The 'Basic Info' section contains fields for Test ID (353814), Test Due (10/21/2015 13:05), Status (IN PROGRESS), Testing certificate number (435734170-11), Vendor ID (CNVENDOR001), Meter 1 (300), Test Type (RGTEST3), Approved and Closed (checkbox), Vendor invoice (45147601), and Meter 1 Validation. The 'Test Notes' section has an 'Existing Notes' area and an 'Add New Note' area with a 'Save New Note' button. On the right, there are buttons for 'Edit Elements', 'Comments' (highlighted), 'Notes', and 'Files'. At the bottom are 'Cancel' and 'Save & Close' buttons.

4. Enter a note in the Add New Note area and click one of the following buttons:
- Click the **Save New Note** button to save the note and return to the Work Order Test Result Test Elements Summary page where the Notes button will now be highlighted
 - Click the **Save & Close** button to return to the Work Order Test Result Existing Test Results page
 - Click the **Back** button to return to the previous page without saving the note.
5. Click the **Files** button to add files to the test and to see files already associated with the test.

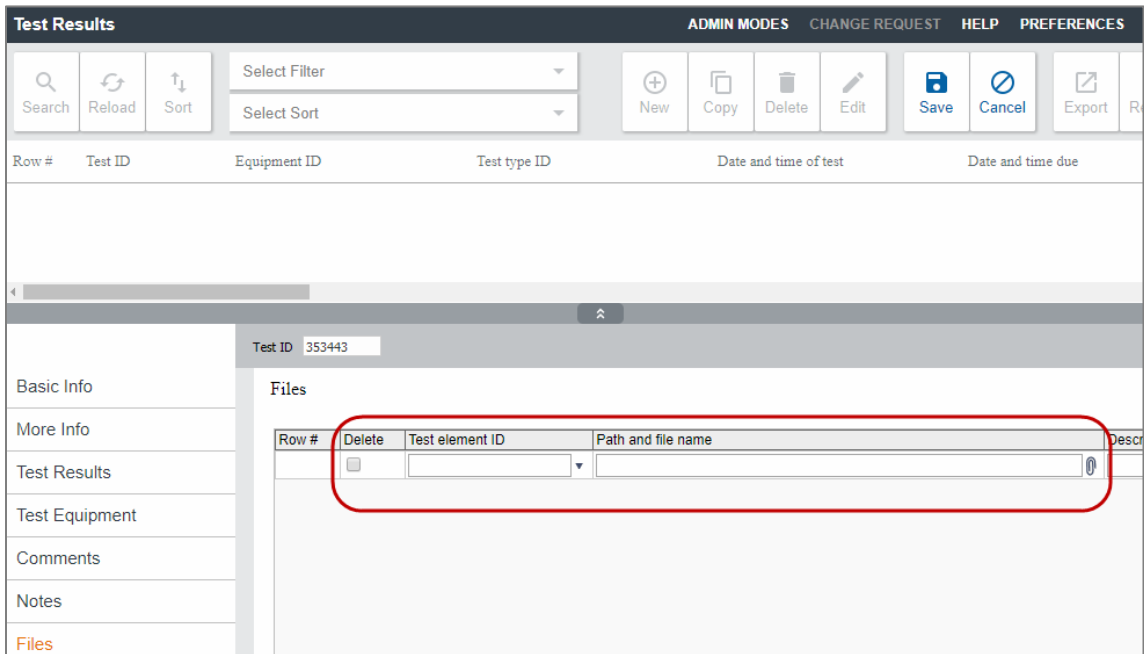
The Related Files Links dialog displays:

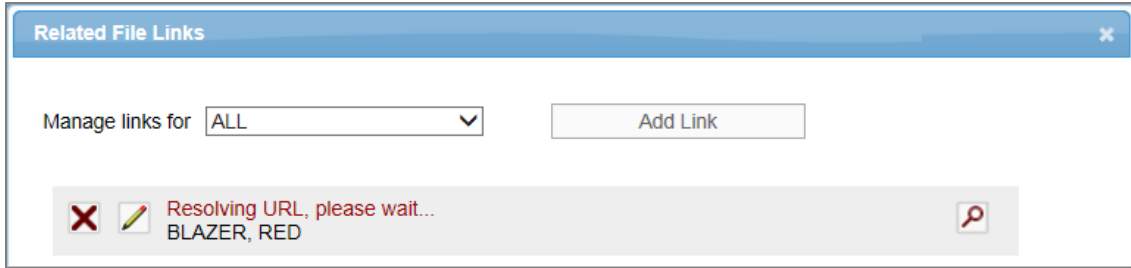
6. Click the **Manage links for** drop-down list to show the test and its elements, and how the file is associated to the test. When **Test Result** is highlighted, it means the uploaded file is associated with the entire test as depicted in the following screenshots. A test element is highlighted when it is associated with the file.



- You can select **ALL** to associate a file with the entire test, or select a specific **Test Element** to associate a file with that particular element.
7. Click **Add Link** to upload the file as outlined above.

 **Note:** When adding a file, if you do not enter a test element ID, the file is associated with the entire test, and not a specific element.





The dialog box titled "Related File Links" has a close button (X) in the top right corner. Below the title bar, there is a label "Manage links for" followed by a dropdown menu currently set to "ALL". To the right of this is an "Add Link" button. Below these elements is a status bar with a red 'X' icon, a pencil icon, and the text "Resolving URL, please wait... BLAZER, RED". On the far right of the status bar is a magnifying glass icon.

Once you add a file, it will highlight and show as being associated with this test result number.

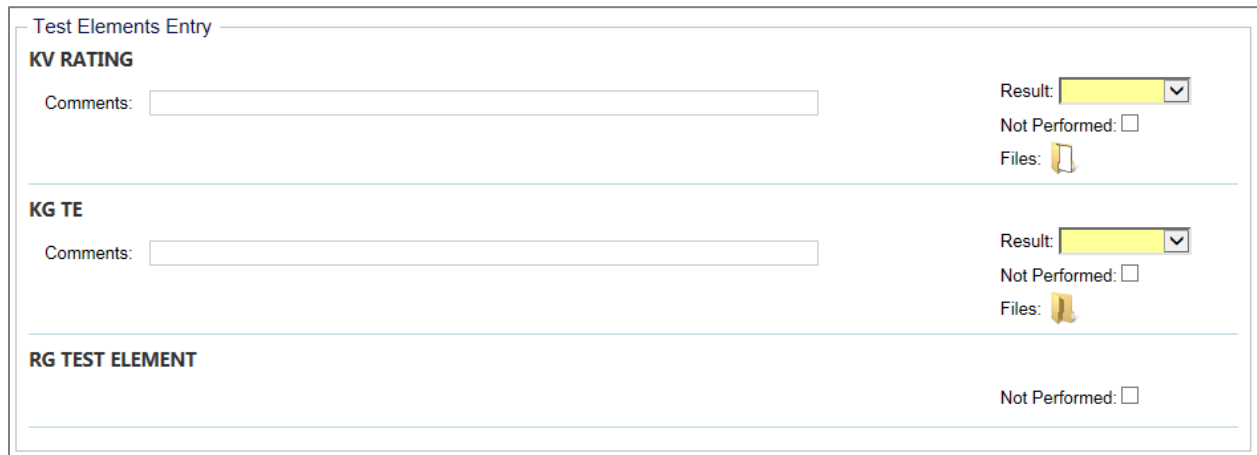
8. Click the **X** in the upper-right corner of the Related File Links dialog to return to the Test Elements Summary page.

You are returned to the Test Elements Summary page.

9. Click **Save & Close** to save your entries.

Test Elements Entry Section

The Test Elements Entry section lists the Test Element IDs. For each Test Element, you can provide Comments, select a Result (PASS, Fail, CORR), check if the element was Not Performed, and add Files.



The "Test Elements Entry" form contains three sections: "KV RATING", "KG TE", and "RG TEST ELEMENT". Each section has a "Comments:" label followed by a text input field. To the right of each section are controls for "Result:" (a dropdown menu with a yellow background), "Not Performed:" (a checkbox), and "Files:" (a folder icon). The "RG TEST ELEMENT" section only shows the "Not Performed:" checkbox.

Function Buttons



A horizontal bar containing two buttons: "Cancel" and "Save & Close".

The remaining buttons allow you to perform the following functions:

- **Cancel** button: Return to the Main Work Order Test Results page.
- **Save & Close** button: Save your entries and return to the Main Work Order Test Results page.

21. Equipment Management Page

When you enter an equipment ID, license number, asset number, or VIN, in the **Search** bar on the main Technician page, click **Go** to go to the Equipment Management page.



The Equipment lookup function only shows data allowed by location security.

Either the Equipment Management page for that equipment displays, or a Found Equipment Units Matching page displays if there is more than one equipment unit matching the entry.

- Found Equipment Units page

Found 10 Equipment Units Matching KGCAR1						
Equipment ID	Asset Number	License Number	Serial Number	Year	Make/Manufacturer	Model
KGCAR1			E1	1753	NEW FLYER	C40LF
KGCAR10			T10	1753	NEW FLYER	C40LF
KGCAR100			F43	1753	NEW FLYER	C40LF
KGCAR1000			R4334	1753	NEW FLYER	C40LF
KGCAR101			WERER45	1753	NEW FLYER	C40LF
KGCAR102			GFD	1753	NEW FLYER	C40LF
KGCAR11			S4	1753	NEW FLYER	C40LF

If more than one equipment unit is found, select the desired equipment number by clicking the Equipment Number button.

- The Equipment Management page



The Equipment Management page (Current and Pending Work) lists all work orders and service requests for the desired asset. The Equipment Management page shows *active* assets.

Current and Pending Work				
Asset ID: SRV-CAR01 100-JGC-1987 2006 JEEP GC-SRV01 LT KHAKI JEEP GRAND CHEROKEE 				SRV-CAR01
Asset Number	SRV-ASSET001	Station Location	1 - OPS	
License Number	SPOKAN01	Repair Location	1 - OPS	
Operator Name	SRV - SARAH VICKERS			
Work Orders: 4 Expand All Collapse All				
1-2016-44	Status: OPEN	Job Type: PM	Priority: R1 - PRIORITY CODE FOR TESTING	
Assignment	SRV SCHEDULE TESTER Service Status: DOWN - DOWN FOR SERVICE Repair Reason: PM Service: TH-PM-SRV-1 - TONYA'S PM SERVICE FOR EXCEPTION BASE PM CHECKLIST Delay:			
1-2016-41	Status: OPEN	Job Type: REPAIR	Priority: R1 - PRIORITY CODE FOR TESTING	
Assignment	REPAIR FOR SRV JEEP Service Status: DOWN - DOWN FOR SERVICE Repair Reason: A - ACCIDENT Delay: PV - AWAITING PARTS VERIFICATION			
Pending Service Requests: 0				
Task	Symptom	Entered When	Entered By	Priority
Back Repair History New Service Request New PM WO New Repair WO				

The Equipment Management page (Current and Pending Work) allows supervisors to view and access the work orders and pending service requests assigned to a particular asset. The selected **Equipment ID**, **Asset Number**, **Station Location**, **License Number** and **Repair Location** may display at the top of the Equipment Management page. Clicking on the **Equipment ID** link takes you to the Asset Primary Screen if your user has rights to view that screen. The View Asset zoom  icon takes you to the AssetViewer as discussed below in the following section.

 The Equipment Management page shows *active* assets.

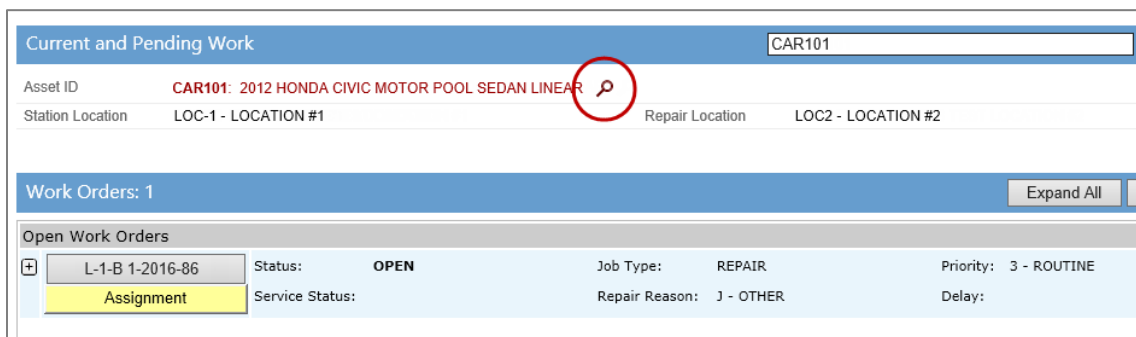
 For linear assets, to the right of the asset ID there is an Attributes icon . Click this icon to see attributes and information for the liner asset.

Asset Viewer

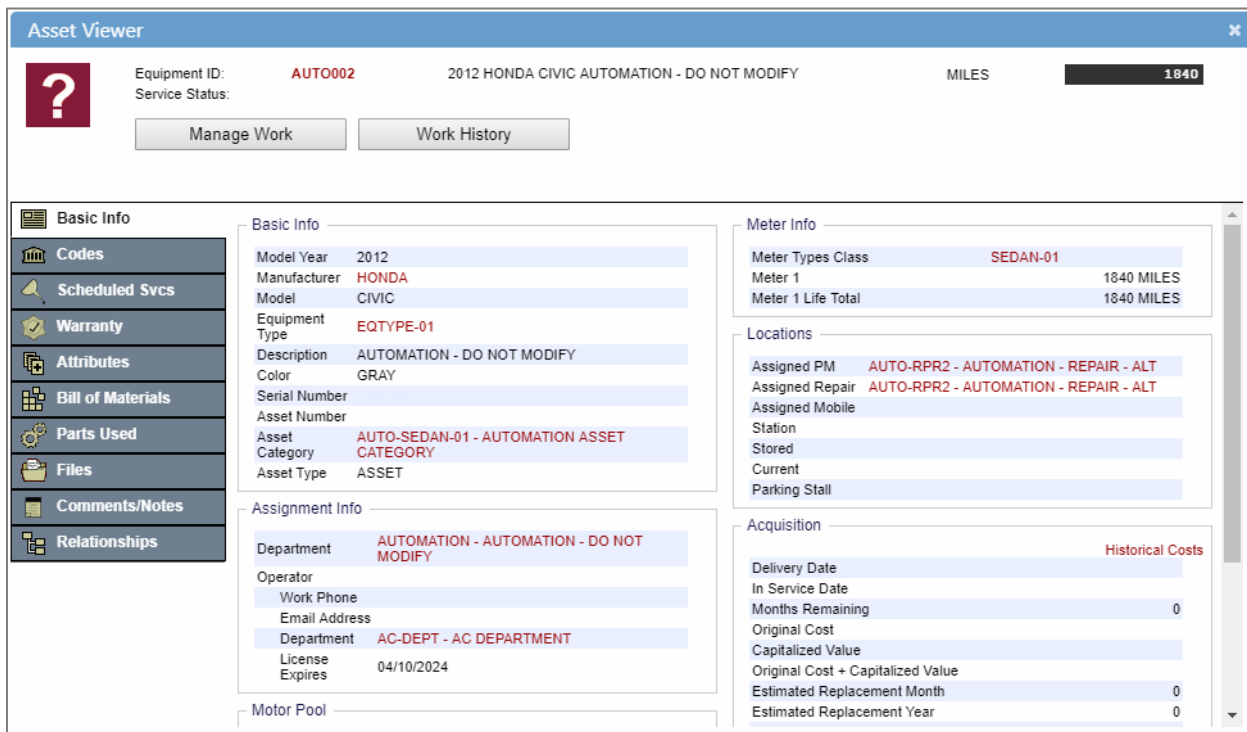
Throughout Shop Activity, the Asset Viewer gives you the ability to view an equipment unit's relationship tree. It provides many details about the equipment unit including PM information, meter and usage information, links to Enterprise Portal screens, and more.

On many Shop Activity pages, click the Equipment ID zoom icon to go to the Asset Viewer.

 **Note:** For linear assets, to the right of the asset ID and zoom button, there is an Attributes icon . Click this icon to see attributes and information for the liner asset.



For more information on the Asset Viewer, refer to the *General Application Information* guide.



Work Orders Section

Work Orders: 3					Expand All	Collapse All
Open Work Orders						
+	ABA-2014-10	Status: OPEN	Job Type: REPAIR	Priority: Q0 - PRIORITY CODE		
		Service Status:	Repair Reason: J - OTHER	Delay:		
+	MAIN2-2014-18	Status: OPEN	Job Type: REPAIR	Priority: Q0 - PRIORITY CODE		
		Service Status:	Repair Reason: C - WEAR AND TEAR	Delay:		
Finished Work Orders						
	MC-2018-35	Status: WORK FINISHED	Job Type: REPAIR	Priority: Q0 - PRIORITY CODE		

The Work Orders section lists the work orders for the piece of equipment. This section displays work orders in the open, pending, or finished status states.

Click the **+** button or the **Expand All** button to expand the view and see the tasks on the work orders. Likewise, click the **-** button or the **Collapse All** button to return to a collapsed view with the tasks hidden.

Work Orders: 3

Expand All

Collapse All

Open Work Orders

CNLOC1-2015-368

Status: **OPEN**

Job Type: REPAIR

Priority: 3 - ROUTINE

Service Status: RA-PART - PART REQUEST SERVICE STATUS

Repair Reason: CN01 - REPAIR REASON MAX CHARACTER 01

Delay:

Task	WAC
01-SRT - GENERAL TASK	
APK-TA-D100 - APSE SUPPLY ISOLATION INSPECTION (POWER DOWN)	
APK-TA-D101 - APSE EXTERNAL INSPECTION	
APK-TA-D102 - APSE INTERNAL INSPECTION	

Pending Service Requests Section

Pending Service Requests: 1					
	Task	Symptom	Entered When	Entered By	Priority
		RPLC ANTIFREEZE - COOLING SYSTEM > OVERHEATING > RPLC ANTIFREEZE	09/10/2015 10:29 AM	MOLLYT	3
No Comment					

The Pending Service Requests section lists the service requests (by priority rank) pending for the piece of equipment. Click the **View/Edit** button to open the Service Request/Defect page as shown in the section below.

Equipment Work Search Section

Current and Pending Work				Eq ID - License # - Asset # - VIN - Rebuild Part ID	Search
Asset ID	SRV-CAR1: 7897894569 2006 CHEVROLET BLAZER RED BLAZIN FIRE				
Asset Number	SRV01	Station Location	ABA - 2 ASSET CENTRAL ADMINISTRATION		
License Number	JFK-509	Repair Location	ABA - 2 ASSET CENTRAL ADMINISTRATION		

In this area, technicians may enter an Equipment ID, Serial Number, Description, License Number, or Asset Number to bring up the current and pending work for another piece of equipment.



The Equipment lookup function only shows data allowed by location security.

Other Buttons

The button descriptions below are the buttons found at the bottom of the Equipment Management page.

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

New Service Request Button

1. Click **New Service Request** to open the Service Request/Defect page. This button allows you to create a service request that is not related to a work order.

Service Request / Defect

Asset ID	SRV-CAR01: 100-JGC-1987 2008 JEEP GC-SRV01 LT KHAKI JEEP GRAND CHEROKEE		
Asset Number	SRV-ASSET001	Station Location	1 - OPS
License Number	SPOKAN01	Repair Location	1 - OPS
Operator Name	SRV - SARAH VICKERS		

Basic Information

Asset ID	SRV-CAR01	...	JEEP GRAND CHEROKEE
Location	1	...	OPS
Reporting Source			
Operator ID		...	
Name			
Phone Number			
Email Address			
Symptom		...	
WAC		...	
Condition rating		...	
Priority ID	R1	...	PRIORITY CODE FOR TESTING
Estimated Hours			

Notes and Comments

Notes	Comments
New Note	

Back
Save
New Work Order

The top section includes the Asset ID, Asset Number, License Number, Operator Name, Station Location, and Repair Location. The Basic Information section includes Asset ID, Location, Reporting Source, Operator ID, Name, Phone Number, Email Address, Symptom, WAC, Condition Rating, Priority ID, and Estimated hours. You can also add notes and comments as needed in the Notes and Comments section.

- Complete the fields and click the **Save** button to save the service request.

The service request shows on the Equipment Management page in the Pending Service Requests section.

Pending Service Requests: 2					
Task	Symptom	Entered When	Entered By	Priority	
Q	LEAKING-HOSES - FUEL SYSTEM > HOSES > LEAKING HOSES	09/10/2015 10:44 AM	MOLLYT	3	No Comment
Q	RPLC ANTIFREEZE - COOLING SYSTEM > OVERHEATING > RPLC ANTIFREEZE	09/10/2015 10:29 AM	MOLLYT	3	No Comment

Repair History Button

Click **Repair History** to go to the Work Order page.

 Depending on settings, the default number of months to report for equipment history may not initially display results for the selected Equipment on the Work Order History page as indicated in the screenshot below.

No work order history for RACAR16 within the last 12 months.							
Work Order ID	WO Date	WO Closed Date	Task ID	Life Meter 1	Meter Since Last PM	WAC	E

In the Current Filter section, you can modify the filter to display different months of history, number of work orders, or task IDs. Click **Apply Filter** or **Reset Filter** to apply/reset the filter.

 0=ALL For Months of History to Display and Number of Work Orders to Display and Wildcard=% for Task ID

Current Filter		
☒ Months of History to Display (0 = ALL)	4	Task ID (Wildcard = %)
☐ Number of Work Orders to Display (0 = ALL)	10	
		Apply Filter Reset Filter

The history displays according to the modified filter.

Equipment History							
Asset ID	SRV-CAR1: 7897894569 2006 CHEVROLET BLAZER RED BLAZIN FIRE 🔍						
Asset Number	SRV01	Station Location	ABA - 2 ASSET CENTRAL ADMINISTRATION				
License Number	JFK-509	Repair Location	ABA - 2 ASSET CENTRAL ADMINISTRATION				
Current Filter							
☒ Months of History to Display (0 = ALL)		12	Task ID (Wildcard = %)				
☐ Number of Work Orders to Display (0 = ALL)		10			Apply Filter Reset Filter		
History for the last 4 months							
Work Order ID	WO Date	WO Closed Date	Task ID	Life Meter 1	Meter Since Last PM	WAC	Emple
1-2016-43	09/23/2016 10:08 AM	09/23/2016 10:14 AM	CNTASK001 - CN REPAIR GROUP - TASK 001 - SUPPORTS ALL ASSET CATEGORIES	0			
1-2016-22	08/10/2016 01:52 PM		AC1-001 - BASIC TASKS - CLEANING	0			
Back Show All Months Printer Friendly							

- Click the Work Order ID link to open the Work Order Details page. See the [Work Order Details Page](#) section above for more information about this page.
- Click the **Show All History** button to display that equipment ID's work order history for all months.
- If configured, click **Printer Friendly** to print the equipment ID's history.



You need to have access and permission to Reports for the **Printer Friendly** button to work properly.

New PM WO Button

The **New PM WO** button takes you to the New Work Order (for PM) page. Please see the [New PM Work Orders](#) section for more information about this page.

New Repair WO Button

The **New Repair WO** button takes you to the New Work Order Page (for Repairs). Please see the [New Repair Work Orders](#) section for more information about this page.

Back Button

The **Back** button takes you back to the either the Equipment Units Matching page or the Main Technician page, depending upon where you originated.

22. Appendix A – Extra Information about Production Run Work Orders

Overview

Some Shop Activity pages appear slightly different when viewing a production run work order versus a regular work order. This Appendix outlines the differences on the various pages related to viewing production run work orders.

For additional information about production runs and/or the Production Manager Portal, please refer to the *Shop Activity Production Manager Portal User Guide*.

Production Run Identifying Information

For all pages with a section at the top that contains detailed information about the production run work order, the production run ID or current stage are listed. Refer to the following screenshot as an example:

Work Order Main			
Asset ID	TM-MAPC688: MAPC 688 2004 BOMBARDIER WR421-1C MOTOR TRACTION BOMBARDIER FOR 311/312 AC		
Asset Number	H	Repair Location	AME172 - ARMOUR - MOTOR SHOP
Asset Meter 1	45533 MILES	Asset Type	COMPONENT
Life Meter 1	45533 MILES	Address	
Work Order ID	AME172-2010-225	Job Status	OPEN
Job Type	REPAIR	Unit In	11/03/2010 05:59
Due	11/04/2010 05:59	Meter 1	0 MILES
Work Completion	0 / 4 (0.00%)	Hours Completion	3.52 / 1.00 (352.00%)
Address			
Production Run ID	6750		

Tasks: 4 All WO Tasks			
	Task ID	WAC	Remaining Hours
	MO3-MA60410A - 60410 DISASSEMBLE AC TRACTION MOTOR		-0.03
	MO3-SP60410B - 60410 STEAM CLEAN AC TRACTION MOTOR	05	-2.49
	MO3-MA60410C - 60410 AC TRACTION MOTOR OVERHAUL		0.00
	MO3-TA60410D - 60410 DYNO TEST AC TRACTION MOTOR		0.00

Actions		
Main Page	Start Delay	View/Edit Detail
Next Stage	Part Actions	Notes
Equipment History	Test Results	Related Files
Messages	Print Work Order	Component Warranty
Commercial Work	Postings	Relationships

Title and Comments	
Save	

Back	Assignments
-------------------------------------	--

Production Run ID are listed in detailed information on pages when viewing Production Run Work Order.

Main Technician Portal Page

On the Main Technician page, when there is a production run work order with a task that is ready to be worked on, the stage is highlighted in yellow.



Note: The current stage's location must be the same as the location you are currently working in order for it to display as highlighted. See the screenshot below as an example of the above mentioned condition.

The screenshot shows the 'My Work Portal' interface for Sarah Vickers (SRV) at 1-OPS. The Labor Status is NONE and the Session Time Code is REG - REGULAR. The interface includes tabs for 'Current Job', 'My Work', and 'Requests'. The 'My Work' tab is active, showing a list of tasks. The task 'AME172-2011-47' is highlighted in yellow, indicating it is the current stage. The task details for 'AME172-2011-47' are: TM-MAPC 838 2006 BOMBARDIER WR421-1C MOTOR TRACTION BOMBARDIER FOR 311/312 AC, Priority: 8, Delay: Days Open/Left: 1987/0, Service Status: Stage: 60410-DISASSEMBLE @ AME172. The task is scheduled for 09/28/2016 10:25 AM.

Task ID	Task Description	Priority	Delay	Qty Required	Qty Released
RGLOCS-2013-531	RGPART001-1 MOTOR- WIPER- FLX-ALL- WINDSHIELD- CURBSIDE- HAUSMAN BUS SA	1		1	1
1355513	SRV-TASK001 SARAH'S TASK 001	T1	Shop: 1		
AME172-2011-47	TM-MAPC 838 2006 BOMBARDIER WR421-1C MOTOR TRACTION BOMBARDIER FOR 311/312 AC	8	Days Open/Left: 1987/0		
1-2015-5	SRV-CAR1 2006 CHEVROLET BLAZER BLAZIN FIRE	Q0	Days Open/Left: 372/0		
1-2016-44	Scheduled: 09/28/2016 10:25 AM				

Production Run Stage highlighted in yellow

Work Order Main Page

When viewing a production run work order, the Work Order Main page has a Task Selector box at the top of the Tasks section as well as the Next Stage button in the Actions section of the page.

Task Selector Box

The Task Selector drop-down box allows you to select from a list of tasks associated with each stage. Click the drop-down arrow and select the task to populate the Tasks section accordingly.

The screenshot shows a web interface for a production run work order. At the top, it displays 'Due' date (08/26/2011 09:31), 'Current Stage' (60410-DISASSEMBLE @ AME172), 'Work Completion' (0 / 4 (0.00%)), and 'Hours Completion' (0.00 / 7.00 (0.00%)). Below this is a dropdown menu for 'Address' with the following options: 60410-DISASSEMBLE - DISASSEMBLE AC T/M 60410 @ AME172, 60410-CLEAN - CLEAN TM 60410, 60410-OVERHAUL - OVERHAUL AC T/M 60410 @ AME172, and 60410-TEST - DYNO TEST AC T/M 60410 @ AME172. Below the dropdown is a 'Tasks: 4' section with a table of tasks. To the right of the table are buttons for 'Main Page', 'Next Stage', 'Equipment Hist', 'Messages', and 'Commercial W'. At the bottom left is a 'New Task' button.

Task ID	WAC	Remaining Hours
MO3-MA60410A - 60410 DISASSEMBLE AC TRACTION MOTOR		3.00
MO3-SP60410B - 60410 STEAM CLEAN AC TRACTION MOTOR		1.00
MO3-MA60410C - 60410 AC TRACTION MOTOR OVERHAUL		0.00
MO3-TA60410D - 60410 DYNO TEST AC TRACTION MOTOR		3.00

Select the tasks for the stage from the drop-down selection box

Actions Section

In the Actions section of the Work Order Main page, there are several different buttons that may display when viewing a production run work order. For example, you will either see a **Next Stage** button or a **Finish Work Order** button. The **Next Stage** button appears when more stages exist on the production run. The **Finish Work Order** button appears when it is the last stage of the production run.

The screenshot shows the 'Actions' section of the Work Order Main page. It contains a grid of buttons. The 'Next Stage' button is highlighted with a red circle.

Actions		
Main Page	Start Delay	View/Edit Detail
Next Stage	Part Actions	
Equipment History	Test Results	Related Files
Messages	Print Work Order	Component Warranty
Commercial Work	Postings	Relationships

The **Next Stage** button displays when additional stages exist

Actions		
Main Page	Start Delay	View/Edit Detail
Finish Work Order	Part Actions	Notes
Equipment History	Test Results	Related Files
Messages	Print Work Order	Component Warranty
Commercial Work	Postings	Relationships

The **Finish Work Order** button displays when it is the last stage

When viewing a production run work order for a part or an internal inventory rebuild, the **Serial Numbers** and **Completion** buttons appear in the Actions section of the Work Order Main page. Click the **Serial Numbers** button to add serial numbers to the production run work order. See the [Serial Numbers Page](#) section above for more information about this page. Click the **Completion** button to release the part to inventory.

Actions		
Main Page	Start Delay	View/Edit Detail
Finish Work Order	Part Actions	Notes
Serial Numbers	Print Work Order	Completion
Commercial Work	Postings	Relationships

Serial Numbers and **Completion** buttons display on Work Order Main page for Production Run Work Orders for parts and inventory rebuilds

Work Order			
Part ID	6425-1 - HPBTU, WABCO, RAIL CAR HIGH PRESSURE BRAKE TREAD UNIT ACTUAT		
Work Order ID	ABS172-2011-388	Job Status	OPEN
Job Type	INV REBUILD	Restock Location	ARM - ARMOUR YARD MAIN RAIL STORE RM
Rebuild Quantity	9	Unit In	09/07/2011 07:51
Due	09/14/2011 07:51	Current Stage	6425 @ ABS172
Production Run ID	8455		
Serial Numbers 9			
#	Completed?	Serial No	Comments
1	N		
2	N		
3	N		
4	N		
5	N		
Save Changes			
Add Serial No			
Serial No			
Comments			
Add			
Back			

Serial Numbers page for adding/changing serial numbers

Work Order			
Part ID	6425-1 - HPBTU, WABCO, RAIL CAR HIGH PRESSURE BRAKE TREAD UNIT ACTUAT		
Work Order ID	ABS172-2011-388	Job Status	OPEN
Job Type	INV REBUILD	Restock Location	ARM - ARMOUR YARD MAIN RAIL STORE RM
Rebuild Quantity	9	Unit In	09/07/2011 07:51
Due	09/14/2011 07:51	Current Stage	6425 @ ABS172
Production Run ID	8455		
Completion History			
No items completed			
Part Release / Completion			
Date Released	10/05/2016 16:23		
Qty			
Serial No			
Back		Save	

Completion History Part Release/Completion Page for releasing parts back to inventory

See the [Work Order Main Page](#) section in the main document above for more details regarding the Work Order Main page.