

Version 25



Work Management

Administrator Guide

Trade Secret | February 2025

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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.

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Version 25.x

February 2025

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1. Overview

The Shop Activity Work Management portal gives supervisors immediate access to relevant data based on their work management needs by providing a highly customizable entry point to the Shop Activity workflows. The most important customization in the Work Management portal is the ability to create user-defined filters for the gadgets. For example, the supervisor can define a set of filters for a gadget to show typical counts for various assets and add it to the front page. This allows the product to better support a wide variety of assets.

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 Supervisor 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 as unanticipated results may occur.
-  Do not open or use the same instance of the web portals in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Installation and Upgrade

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

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

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

Preliminary Steps

If your organization uses the Shop Scheduling module to make work assignments, follow the steps below to enable proper work assignment to technicians. If your organization does not use the Shop Scheduling module to assign work, skip this section.

1. Ensure that your organization is licensed for the Shop Scheduling module (Help > About).
2. Open the Organization Locations – Primary Information screen and make sure the locations are set up. Then check **Shop scheduling active** box on the Functions tab.

The screenshot shows the 'Locations' screen with the 'Functions' tab selected. The 'Shop scheduling active' checkbox is highlighted with a red circle. The 'Work management classification' field is also visible.

3. To activate a Shop Activity Setup option, open the Shop Activity – Setup – Options screen Special Items tab.
4. Check the **Maintain Work Assignment data** checkbox, then click the **Initiate Work Assignment data** button.

Shop Activity - Setup - Options

ADMIN MODE CHANGE REQUEST HE

Search Reload Sort

Select Filter

Select Sort

New Copy Delete Edit Save Can

Shop activity management options

Options

Special Items

Meter Required

Rates and Markups

Repair Reasons

Timekeeping

Special Items

Work delay IDs for the following delay types

Equipment not delivered

Awaiting transfer (user responsibility)

Awaiting transfer (shop responsibility)

Work class for work orders opened with hand-held devices

Work class for multi-unit projects

Work class for incident work orders/service requests

Remove duplicate tasks on work orders

☐ Maintain Work Assignment data

☐ Track changes to schedules on work assignment

☐ Generate commercial requests when vendors are assigned to work orders

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

Add Work Management Portal Tab to Web Modules

To make the functions of the Work Management portal available to Web Modules users, create the tab and assign rights for supervisors.

3. Configure the Portal

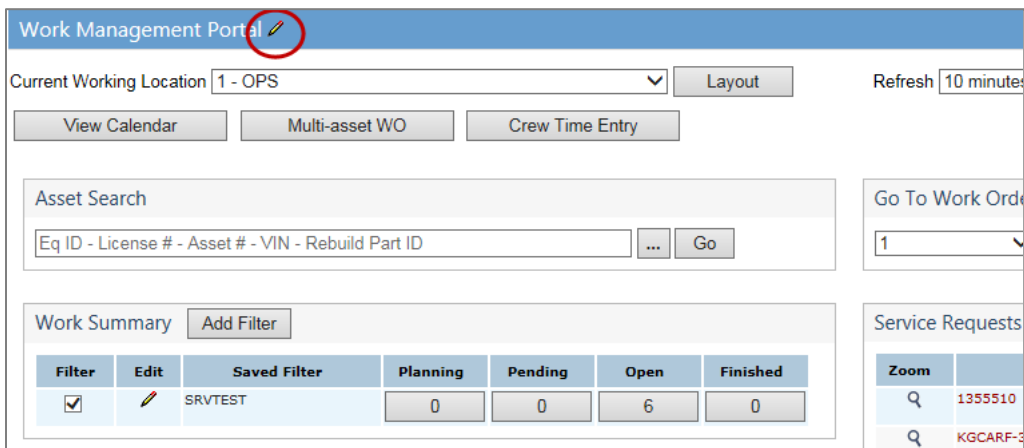
Once you have added the Work Management portal tab to Web Modules, you must configure the portal.

To configure the portal:

1. Log in to Web Modules as an Administrator, and click on the Work Management Portal tab.

The Work Management Portal page displays.

2. To configure the Work Management Portal settings, click the **Edit Pencil**  next to the Work Management Portal title bar.



The Work Management Portal Settings page displays. This page is divided into several sections as outlined in the following sections.



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

Location Settings Profiles



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

Asset Type Profiles

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

For more information on Asset Profiles and setting them up, refer to the *Asset Administrator and User Guide, section 4. Understanding the Asset Portal, Asset Profiles*.

Portal Settings

Use Employees who report to this employee for management activities

This setting limits employee choice lists and display to the employees that report to the currently logged in Supervisor.

Automatically assign current user to new and re-opened work orders: Enable this option to assign the current logged in employee ID to work orders that are created, or work orders that are reopened. By default, this option is disabled.

Settings for Employee Detail Page

Today's Timesheets Report

This field specifies which report runs when you click the **View Today's Timesheets** button.

- ✔ If you are customizing this report, be aware that the following case sensitive parameter is used to generate this report: EmpID, ShopID, and PastHours.

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

Settings for Work Management Portal Page

This section is where you determine whether you would like the Service Level Agreement Availability information displayed and whether the Service Level Agreement Report will be accessible to users. You also determine the user groups that see certain asset types and work order types in the Work Management pages.

Show Service Level Agreement Availability Information

Check this box if you would like service level agreement availability information displayed on the Main Supervisor Portal page as indicated in the screenshot below.

My Workshop Portal

Current Working Location: CNLOC1 - REPAIR SHOP 1

Shop Activity

- 32 Assigned to shift
- 16 Clocked in on shift
- 0 Clocked in other shifts
- 4 On work orders
- 0 On indirect
- 1 Pending part return requests

Employee Management | Part Return Requests

Availability

Filter: [Dropdown]

- 0 Spares
- 0 Vehicles Required
- 0 Vehicles Assigned
- 0 Vehicles Unavailable

Manage Availability | Availability Report

Location Work Orders

	Pending SRs	Pending	Open	Work Finished
All Asset Types	776	47	233	25
ASSET	355	39	177	25
COMPONENT	1	1	6	0
LINEAR	10	7	48	0
RAIL	0	0	1	0
STATIONARY	1	0	1	0
INVENTORY REBUILDS			6	1

Production Run Work Orders

ASSETS		1	0
INVENTORY REBUILDS		0	0

Equipment Management

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

View Calendar | Multi-asset WO | Work Order Management | Review and Close

Crew Time Entry

➔ Click the **Edit** or the **Manage Availability** button to go to the Availability Filter page. Please refer to the *Shop Activity Supervisor User Guide* or the *Shop Activity Work Management User Guide* for additional information about this page.

Availability Summary

- 0 Spares
- 0 Vehicles Required
- 0 Vehicles Assigned
- 0 Vehicles Unavailable

Filter

Quick Filter: [Dropdown] Set As Default Remove

SLA Category: % Save

Avail Location: JHLOC1 Save

Department: % Save

Save Quick Filter As: [Text] Save

Equip Status: UNAVAILABLE

Service Status: [Text] Save

Equipment ID: [Text] Save

Reset Filter Apply Filter

Equipment Found - Available: 0, Unavailable: 0

Sort: [Dropdown]

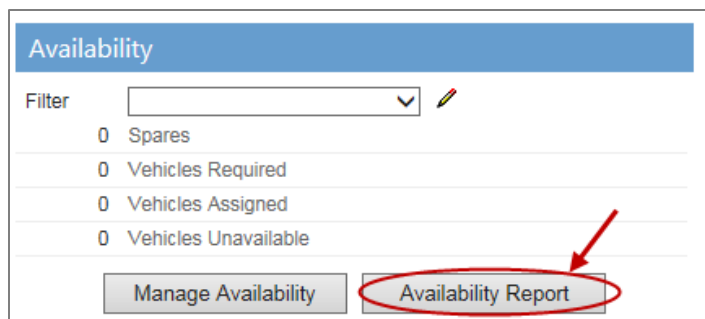
Equipment ID	Work Order ID	Job Type	Repair Reason	WO Service Status
--------------	---------------	----------	---------------	-------------------

New Service Status: [Text] Update Checked WOs

Back

Service Level Agreement Report

This field specifies which report is run when you click **Availability Report**.



- ✓ If customizing this report, please be aware that the following case sensitive parameter is used to generate it: DeptID. Leave this setting blank to NOT have a report link at all.

Work Order Management Asset Types/Work Order Types

This identifies which user groups see which asset types and work order types in the Work Management pages. The selections affect what is displayed on the front page and what is filterable.

➡ Click the selection box and choose the desired user group (No Users, All Users, or a specific user group) for each of the following asset and work order types:

- Asset type: ASSET (Fleet)
- Asset type: COMPONENT
- Asset type: RAIL
- Asset type: LINEAR
- Asset type: STATIONARY
- WO type: PART REBUILDS
- WO type: PRODUCTION RUNS

Common Settings

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

Require a new note when rejecting Service Requests

This setting determines if a note is required for explanation when rejecting a service request.

Marker and Offset Information required when stopping labor:

This setting determines if the marker and offset information is required when stopping labor.

In the Common Settings (supported by Technician and Supervisor Portals) section, the **Marker and Offset information required when stopping labor** on a linear work order supports real-time labor capture. If checked, the technician must enter marker information through the stop/edit task. Otherwise, marker information defaults to marker start/end automatically.

Common Settings (supported by Technician and Supervisor portals)	
Require a new note when rejecting Service Requests	☐
Marker and Offset information required when stopping labor	☒
Use technician clock in/out	☒
Display Task Repair Group description on Work Order Main	☒
Number of hours to report back for timesheets	35
Integrated Capital Project Portal Tab Name	
Default Work Accomplished Code (WAC) for PM Tasks	Q-D1 - QA WAC - DEFERRED MAINT

Value is required for: From/To Marker info

C/C/C Information	
Fail / Cause Code	AC-DIRTY ... COVERED IN FILTH
Correction Performed	REPAIRED
Update Task Fields	
WAC	06 ... DEFERRED
☐ Final Status	
From Marker	37900 ... Offset 8.0000
To Marker	37900 ... Offset 18.0000
Work Class	1 ... SCHEDULED
Warranty Work	NO
Repair Reason	CN01 ... REPAIR REASON MAX CHARACTER 01
Account ID	1000.531395.18980.000 ... AUTOMATIC TRAIN CONTROL
Priority ID	3 ... ROUTINE
Estimated Hours	0
Equipment Warranty	☐
Warranty Vendor ID	
Location	CNLOC1 - REPAIR SHOP 1
No Parts Needed	☐
Date and time completed	/ / ...
Comment	
Procedure Information: BASIC TASK, PLEASE PREP ACCORDINGLY.	
Update Work Order Fields	
Add a new note	
Change Task Time Code	
Current Time Code: DI STANDARD DIRECT	
New Time Code: ...	

Back
Save
Stop Task
Finish WO

A technician is required to enter marker and offset Information when stopping labor or finishing a linear work order

Use technician clock in/out:



Note: This should only be set if the corresponding setting is set in the Technician Portal.

This value gives the supervisor the ability to manually clock technicians off of work orders and out of the system. This feature allows a supervisor to override the system when a technician has forgotten to clock out. The supervisor can determine the specific clock out time.

Tech - MollyT

Welcome, MOLLYT - MOLLY
 You are clocked out. Please press CLOCK IN to clock in.

This process does NOT clock you in for payroll. Clock in on the payroll time clock if you have not yet done so.

Session Time Code: DAY SHIFT

Session Location: LMLOC1 - LM LOCATION 1 - SHOP

Clock In

Employees click the Clock In button if the default value is set to YES

My Work Assignments

MOLLY (MOLLY-EMP) @ KG-LOC - KG LOCATION

Work Order: CNLOC1-2015-347 Task Time Code: DI - STANDARD DIRECT [Change]

Task: 119-101 - FU - WHEELS - FLAT/BALD TIRE - VENDOR REPAIR [Modify]

Equipment: INTE235: INTERLOCKING E235 AVONDALE THROAT-PM INTERLOCKING

00h 00m Indirect Time

Edit/Stop Task Today's Timesheet

Clock Out

Current Job My Work

Assignment Status: ALL ASSIGNED MY STAGE Sort: Hotsheet Expand All Collapse All

1 task(s)	CNLOC1-2015-347	Appointment: 09/02/2015 01:13 PM INTE235 2006 INTERLOCKING E235 AVONDALE THROAT-PM Priority: 3 Delay: Service Status: SS-001
1 task(s)	JHLOC1-2015-8	Appointment: 09/02/2015 01:35 PM INTE235 2006 INTERLOCKING E235 AVONDALE THROAT-PM Priority: 3 Delay: Service Status: SS-001
2 task(s)	CNLOC1-2015-349	Appointment: 09/02/2015 01:43 PM INTE235 2006 INTERLOCKING E235 AVONDALE THROAT-PM Priority: 3 Delay: Service Status: SS-001
174 task(s)	CNLOC1-2015-368	Appointment: 09/09/2015 01:15 PM RACAR16 2012 HONDA CIVIC MOTOR POOL SEDAN Priority: 3 Delay: Days Open/Left: 34/0 Service Status: RA-PART
1 task(s)	JHLOC1-2015-19	Appointment: 09/17/2015 09:19 AM RACAR16 2012 HONDA CIVIC MOTOR POOL SEDAN Priority: 3 Delay: Days Open/Left: 27/0 Service Status: RA-PART
2 task(s)	CNLOC1-2015-389	Appointment: 09/24/2015 02:25 PM INTE235 2006 INTERLOCKING E235 AVONDALE THROAT-PM Priority: 3 Delay: Service Status: SS-001

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

If the default value is set to YES, the employee must click the Clock Out button when finished working

Display Task Repair Group description on Work Order Main

This setting determines if the Task Repair Group description shows on the Work Order Main page.

Number of hours to report back for timesheets

This default sets the number of hours to display back from current time for timesheet entries when supervisors click the View Today's Timesheet link on their Employee Detail page.



Note: This is a report. To view the report, the report must be published in the Reporting module and the supervisor must have report access rights for this particular report.



If customizing this report, be aware that the following case sensitive parameters are used to generate this report: EmplID, ShopID, and PastHours.

Allow Supervisors / Technicians to edit their own Timesheet: This setting allows supervisors and technicians to edit their own timesheet entries on the Timesheet for review timesheet summary page.

Integrated Capital Project Portal Tab Name

This setting determines the tab name for the Integrated Capital Project Portal tab. If your organization uses this portal, select the name from the dropdown box.

Integrated Timesheet Portal: Set this option to Timesheet to show the Misc columns from the Timesheet portal when working with timesheets in this portal. The Timesheet Review button will also not display if there is no set portal for timesheets.

Default Work Accomplished Code (WAC) for PM Tasks:

This is a required setting and the administrator has to configure this setting to the desired default work accomplished code (WAC) for all work performed to PM tasks. This WAC applies to work orders for PM tasks only. The WAC determines the work performed to accomplish the task.



Note: A WAC must be created with for this with the **Deferred maintenance** checkbox checked on the Basic Info tab of the Work Accomplished Codes screen. It is advised that this WAC is not set to support all asset categories (**Supports all asset categories** checkbox on the Asset Categories tab of the Work Accomplished Codes screen).

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

Include tasks assigned to other Work Order locations in Work Order management list

This setting controls if work order queries will include work orders at other locations with tasks at the current location. When checked, it includes work orders not at the current location with tasks at the current location. When unchecked, only work orders at the current location will be shown.

Equipment/Part Lookup search string

This setting determines the text string for the equipment/part lookup search.

Search to include the following fields

These options allow you to choose which objects to search when the **Use Asset Chooser instead of Choice-list** option is disabled. Check the boxes to include the various fields in the search string (Equipment ID, License #, Asset #, VIN (Serial Number), Rebuild Part ID, and Inactive Assets).



Note: **Inactive Assets** defaults as unchecked.

Search to include the following fields:

- ☒ Equipment ID
- ☒ License #
- ☒ Asset #
- ☒ VIN (Serial Number)
- ☒ Rebuild Part ID
- ☐ Inactive Assets

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

Search to include the following fields:

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

For more information on the searching the Asset Chooser, refer to the *General Application Information Guide*. The default is checked (to use the Asset Chooser).

Use Asset Chooser instead of Choice-list

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

Use Employee Chooser instead of Choice-list

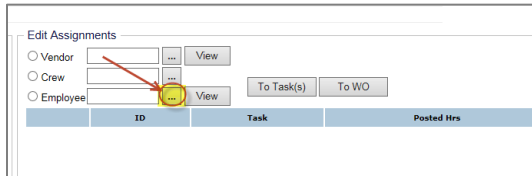
This setting determines if the portals use the Employee Chooser instead of the choice-list.



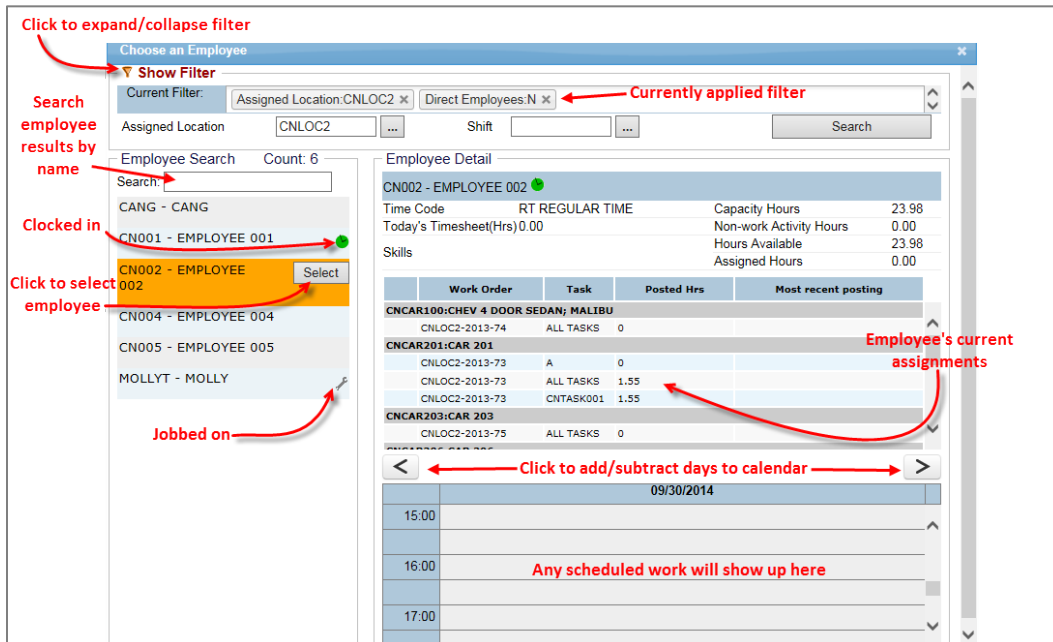
Note: The default is checked (to use the Employee Chooser).

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

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



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



After opening the Employee Chooser, the filter collapses and the **Assigned Location** field defaults. This is set in the Employees – Primary Information screen, Assignment Info tab, with the **Supported locations** settings.

If shop scheduling is supported, Capacity hours, Non-work Activity Hours, Hours Available, Assigned Hours and the Day Calendar will be visible. If not, then these fields will be hidden.

Use the **Search** field (on the left) to quickly search the list of filtered employees. Selecting an employee option will select the appropriate employee and retrieve their detail. Shop scheduling must be active for this to work.

Use Symptom Chooser instead of Choice-list

This setting determines if the portals use the Symptom Chooser instead of the Choice-list.

Use Vendor Chooser instead of Choicelist

This setting will use the vendor chooser instead of a regular vendor choice-list. This choose includes filters and more in-depth searching for vendors and uses wildcards.

Use slider for linear reference offsets

This setting allows you to use a slider when referencing linear offsets.

Enable linear asset attributes viewer when defining work

This setting allows you to turn on the linear asset viewer slider which allows you to slide the beginning and end points of a linear asset to choose what you need to work on. If this box is disabled, the linear slide will be hidden on the Service Request Detail and Work Order Create pages.

Create new appointment for new WOs with estimated appointment hours

This setting allows you to determine if a new appointment is automatically created for new work orders with estimated appointment hours.



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

Display Jurisdiction (For Authenticated Users): Check this option to show the Jurisdiction field for authenticated users

Jurisdiction List Type ID: Select the list type ID for the correct list of jurisdiction choices (created on the Custom List Values screen).

PM Checklist Settings

Default Work Accomplished Code (WAC) for PM Tasks: This field creates a service request from the PM Checklist when set.

PM Check List Items Completion: This field specifies whether to require or prompt the user to make sure the PM Checklist is complete.

Allow modification of completed checklist items by signoff employee and supervisors:

This field is unchecked by default so that when an item is completed, all input fields on that record are disabled for everyone. When the setting is checked it allows supervisors and the employee who signed off of the record to modify its data.

Adding comment to checklist item marks the item as done: This field is checked by default and automatically checks the Done flag when the user sets a comment. When setting is disabled, the Done and Employee ID will not be automatically set when comments are added.

Allow user to complete all checklist items: This field is unchecked by default which means that users must complete each checklist item individually. When the setting is enabled, the following behaviors will occur:

- An extra option will show in table actions that says "Complete All".
- Will show a confirmation dialog to the user saying "This action will mark all checklist items as completed. Continue?"
- Will then check the Done field or enter the current Employee ID for all records.

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

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

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

Commercial Request Permissions

 **Note:** For the Commercial Request Permissions, we recommend that you keep the All Users default if all users have permission regardless of group permission. This setting determines the group that may make commercial requests.

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

Work Deferral Settings

Allow Transfer/Deferral of Work Orders? (Requires 'Limit to one work order open per asset' = 'NO'): Check this box to allow work order transfers and deferrals. If checked, be sure not to limit to one work order open per asset.

User group allowed to transfer/defer WOs: This setting determines which user group may transfer/defer work orders.

Default [final status] Work Accomplished Code (WAC) for deferred WO tasks: This Work Accomplished Code (WAC) applies to deferred work order tasks only. If the checkbox that

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

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

Service Request Deferral

Allow Deferral of Service Requests?: This default value determines whether service requests may be deferred. Check the box to allow service request deferral.

User group allowed to defer SRs: This setting determines which user group may defer service requests.

Default [final status] Work Accomplished Code (WAC) for deferred SR tasks: This WAC applies to deferred service request tasks only. When Allow Deferral of Service Requests is checked above, you cannot leave the WAC blank. You are required to select a default WAC that will be used for all work performed to accomplish this type of task.

Portal-wide Settings

Require equipment history display first time user views equipment unit: This default value determines whether the Equipment Unit History is automatically displayed for all users when a work order is created or viewed for the first time.

Default jobbed on task ID into task filter when viewing Equipment WO History page: Check this field to determine if the Task ID filter on the Equipment History page is defaulted to the currently jobbed on task, or if the Task ID filter is left blank.

Suppress system added notes for viewed equipment history: Setting this default suppresses the record of automated entries that are created when users view equipment history.

Limit to one work order open per asset: This default setting creates a new restriction for the number of OPEN work orders per equipment unit. If set to yes, only one OPEN work order will be allowed per equipment unit. Therefore, no additional work orders will be allowed to be created against such unit. If set to NO, multiple OPEN work orders are allowed per equipment.



Note: This does not apply to Rebuild Work Orders.

Force display of WO Messages while creating a new WO: This default determines whether work order messages are displayed when creating new work orders.

Default number of months to report for equipment history: This default sets the number of months to display when the equipment history report is viewed by supervisors.

The screenshot shows the 'Work History' page. At the top, there are fields for 'Asset ID' (OC-TEST: 2005 VOLVO-NA SUPERTRUCK TEST) and 'Repair Location' (TEST-1 - TEST LOCATION 1). Below these is the 'Current Filter' section. In this section, the 'Months of History' radio button is selected, and its value '12' is highlighted with a red circle. Other options include 'Count of Tasks' (set to 10) and 'All'. There are also checkboxes for 'Show Work Orders with no postings' (checked) and 'Show Tasks with no Work Order' (unchecked). At the bottom right of the filter section are 'Apply Filter' and 'Reset Filter' buttons.

Default number of work orders to report for equipment history: This default determines how many work orders display when equipment history is viewed by supervisors.

This screenshot is similar to the previous one, showing the 'Work History' page. In the 'Current Filter' section, the 'Count of Tasks' radio button is selected, and its value '10' is highlighted with a red circle. The 'Months of History' option is now unselected. All other elements, including the 'Show Work Orders with no postings' checkbox and the filter buttons, remain the same.

Show work order in equipment history with no postings: Check this option to automatically check the Show Work Order with no postings option in the Current Filter section of the Work History page.

The screenshot shows the 'Work History' page with the 'Current Filter' section. In this section, the 'Show Work Orders with no postings' checkbox is checked and highlighted with a red circle. The 'Months of History' radio button is still selected. The 'Count of Tasks' is set to 10. The 'Show Tasks with no Work Order' checkbox is unchecked. The 'Apply Filter' and 'Reset Filter' buttons are at the bottom right.

Default for showing tasks with no work order in equipment history: Check this option to automatically check the Show Tasks with no Work Order option in the Current Filter section of the Work History page.

Work History

Asset ID

OC-TEST: 2005 VOLVO-NA SUPERTRUCK TEST

Repair Location

TEST-1 - TEST LOCATION 1

Current Filter

☒ Months of History

Task ID

...

☐ Count of Tasks

☒ Show Work Orders with no postings

☐ All

☐ Show Tasks with no Work Order

Apply Filter

Reset Filter

Date/Time Values in 24 hour or 12 hour format: This default indicates how to display date/time values, e.g., 24 hour (13:29) or 12 hour (1:29 PM) format.

Show work order comments or notes or both? In this section, you may choose to show work order comments, notes, or both by making the desired selection from the dropdown selection box.

Show Costs for: This area determines the costs to display on the Work Order Details page in the Summary Cost and Detail sections.

Work Order Details

Asset ID	CNCAR344: SNCAR344 2012 FORD F150 CAR 344		
Life Meter 1	300 MILES	Life Meter 2	3 HOURS
Station Location	CNLOC1 - REPAIR SHOP 1	Repair Location	CNLOC1 - REPAIR SHOP 1
Work Order ID	CNLOC1-2015-89	Job Status	OPEN
Job Type	REPAIR	Technician	CNEMP010 - EMPLOYEE 010 - FOREMAN CREW 1 & 2
Unit In	07/06/2015 11:50	Due	07/07/2015 11:50
Meter 1	300 MILES	Meter 2	3 HOURS
Hours Completed	15.00 / 15.00 (100.00%)	Tasks Completed	0 / 3 (0.00%)
Projected Completion Date	10/15/2015 11:17		

Summary Cost Info

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

Comments

Save Comments

Messages

Equipment History

Print Work Order

Start Delay

Notes

Edit Basic Info

Relationships

Files

Test Results

Equipment Usage

Crew Time Entry

Add / Manage SRs

Work Order Tasks

New Job

Work Order Postings

Tasks

Labor

Parts

Cml

New Task

CNTASK001 - TASK 001 - SUPPORTS ALL ASSET CATEGORIES

Remaining Hours: 0.00

WAC:

Parts:

Date	Part ID	Manuf Part No	Manufacturer	Description	WAC	Qty	Unit Price	Total Cost
07/06/2015	CNPART200-0		GENERAL ELECTRI	ENGINE- DIESEL/ V-8 DIESEL ENGINE		1.00	3745.0000	3932.25
Total:								3932.25

Commercial:

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

CNTASK002 - TASK 002 - SUPPORTS ALL ASSET CATEGORIES

Remaining Hours: -15.00

WAC:

Labor:

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

CNTASK003 - TASK 003 - SUPPORTS ALL ASSET CATEGORIES

Remaining Hours: 0.00

WAC:

Back

Assignments

Finish Work Order

Close Work Order

Transfer/Defer Work

Highlight Test Results button if result status is: In this section, check the boxes to choose the statuses that determine when the **Test Results** button is highlighted.

Highlight WO Messages button if WO has these messages: In this section, check the boxes to choose the messages that determine when the **Work Order Messages** button is highlighted.



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

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



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

Locations
ADMIN MODE
CHANGE REQUEST
HELP
PREFERENCE

Search
Reload
Sort

Select Filter
Select Sort

New
Copy
Delete
Edit
Save
Cancel
Export

Basic Info
Functions
Work Orders - Options
Work Orders - Service Requests
Work Orders - More Info

Location ID

Work Orders - Options

☐ Work orders permitted
☐ Permit re-open of closed work orders
☐ Require work class on work orders
☐ Require labor for tasks when parts charged
☐ Require employee ID for PM task checklist items
☐ Check motor pool availability for pool units
☐ Perform SLA out of service and in shop processing from work order screens
☐ Allow issue of not-from-inventory parts at zero unit price
☐ Require tasks on work order postings to be specific tasks (not repair groups)

Include work order messages for associated components
☐ while inserting a new work order
☐ on printed work orders
☐ Apply component options to show all parent-child assets
☐ Display all non-expired component warranties in work order messages

Option to show messages for all parent-child assets

RALOC-1-2012-10 Messages

OTHER OPEN WORK ORDERS

WORK ORDER NUMBER	EST	TYPE	STATUS	REASON	PM SERVICE
AEL173-2012-28		PM	OPEN		B
RALOC-4-2013-292		REPAIR	OPEN	J	
RALOC-1-2013-58		REPAIR	WAIT FOR EQUIP	J	

UNIT IS UNDER WARRANTY - EXPIRES 10/03/2018; METER 1: 150000
UNIT IS 2148 DAYS LATE FOR PM SERVICE A
===MESSAGES FOR ASSOCIATED COMPONENTS===
RACAR1 - 2012 HONDA&US CIVIC&US MOTOR POOL SEDAN LINEAR - TEST
OTHER OPEN WORK ORDERS

WORK ORDER NUMBER	EST	TYPE	STATUS	REASON	PM SERVICE
ARM-2012-9		REPAIR	OPEN	J	
ARM-2012-15		REPAIR	OPEN	J	
ARM-2012-21		REPAIR	OPEN	J	
ARM-2013-5		REPAIR	OPEN	J	
AV1015-2012-1		REPAIR	OPEN	J	
AV1015-2012-12		REPAIR	OPEN	J	
AV1015-2012-13		REPAIR	OPEN	J	
AV2015-2012-1		REPAIR	OPEN	J	
AV2015-2012-2		REPAIR	OPEN	J	
AV2015-2012-3		REPAIR	OPEN	J	

UNIT HAS ADDITIONAL WORK ORDERS OPEN
UNIT IS OVERDUE 01/01/0512 FUEL UNITS ON FUEL CONSUMPTION FOR SERVICE B

Cancel

Calendar and Scheduling

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

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

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

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

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

Parts Actions Settings

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

Settings

Allow employees to search ALL PARTS regardless of supported locations: Checking this box allows employees to search all the parts at all locations. The default is unchecked and will result in WHERE USED only returning parts that are stocked at the location.

Default Part Lookup Part ID search option: This dropdown sets the default for the Part ID search option on the Part ID Lookup page. The dropdown list has the following choices:

- **Include Xref** (with the **...even if xref part ID exists as stock part option** checked (ON)): Searches the part IDs and the cross references and includes cross referenced parts that also are stocked as parts themselves. **Include Xref** (with the **...even if xref part ID exists as stock part option** unchecked (OFF)): Searches the part IDs and the cross references and does not include cross referenced parts that are themselves stocked part IDs.

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

Always search cross references if Include XRef is selected even if xref part ID exists as stock part: Checking this box ensures that cross references are always searched even if the cross referenced parts also exist as a stock part ID. This setting applies to the part lookup search functionality and the setting default is not active.

Display parts quantity on hand as: This default indicates the quantity on hand as either the number of parts in stock (**Number of parts (default)**) or whether the item is available (**Available (yes/no)**).

Require approval for part returns: Checking this box requires supervisor approval for all part returns. **NOTE:** This setting must be the same in both the Technician and Supervisor portals for it to work properly.

Approves/denies part return requests: This default indicates that the portal user approves/denies part return requests and determines if the **Part Return Requests** button shows on the Main Page. The checkbox defaults as checked.

Display Manufacturer Name and Manufacturer Part Number: This setting allows display of part manufacturer and name in most places that part IDs are displayed in the portals.

Part ID Lookup

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

Search by Text

Part ID: contains Include Xref ☐

Description: contains

Product Category: contains 1

Search by Defined Lists

Task ID:

Please choose a Part ID - Parts found: 1376

Search:

Part ID	Suf	Description	Category	On Hand	On Order	Manuf Part No	Manufacturer
05E01098	0	RADIATOR; RAD / CAC ASSY 2014 GILLIG EMP (NEW)	B.011	N/A	0.00	24143CR Cross References: 24143CR-0 BLAH-0 BLAHG-0	ALSTOM Cross References: ALSTOM ALSTOM ALSTOM
1009	0	GASKET-ENGINE; GASKET, ENGINE, ALL, CYLINDER HEAD WATER INLET/OUTLET ELBOW	B.310	N/A	0.00	Cross References: 5117993-0 5117993-0 5117993-0 5117993-0	Cross References:
1017	0	HOSE- SILICON(R); HOSE, SILICON(RUBBER), ID 2-3/8, LENGTH 2-3/4, ENGINE , OIL	B.310	N/A	0.00	Cross References: 23503674-0	Cross References:

Showing 1 to 1,376 of 1,376 entries

Parts History - 1000-2011-3

Parts Posted

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

Parts Requested

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

Post Work Order Parts

Complaint (Symptom) LMBROKEN - PART BROKEN

Basic Info **Standard Parts**

Add Parts Posting - Line 1

Service Request: LMBROKEN - PART BROKEN

Task ID: 01 HVAC SYSTEM

Stock Location: 000 SAN DIEGO, CA

Part: NA-20010

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

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

Position:

Issue Date: 01/27/2011

Warranty Vendor: 100001 J&L INDUSTRIAL SUPPLY - DET

Account ID:

Comments:

NFI: ☐

Fall/Cause ID:

Repair Reason: T WEAR AND TEAR

Configured Parts Catalog: This setting allows you to select the tab that your Parts Catalog portal is linked. It determines where to go when the **Inventory Parts Catalog** button is pressed.

Parts Actions Permissions



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

Allow users in this group to request parts: This setting determines the group that may request parts.

Allow users in this group to issue parts: This setting determines the group that may issue parts.

Allow users in this group to issue NFI (not from inventory) parts: This setting determines the group that may issue NFI parts. **NOTE:** This group must *also* be allowed to issue parts.

Settings for Work Order Main Page

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

Current Report - Print Work Order

This field specifies which report is run when you click the **Print Work Order** button.

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

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

Equipment History Report

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

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

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

Settings for WO Detail Page

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

Current Report - Print Work Order

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

Work Order Details			
Asset ID	1-2017-38	Station Location	1 - OPS
Asset Number	1-2017-38	Repair Location	1 - OPS
License Number	1-2017-38		
Operator Name	1-2017-38		
Work Order ID	1-2017-38	Job Status	OPEN
Job Type	REPAIR	Technician	1-2017-38
WO Meter 1	0 MILES	WO Meter 2	0 HOURS
Contact Name	1-2017-38	Projected Completion Date	04/04/2017 04:00
Priority	1-2017-38	Date In	03/21/2017 11:04
Date Opened	1-2017-38		
Repair Reason ID	1-2017-38	Work Class	
Account ID	1-2017-38	Parking Stall	
Priority ID	1-2017-38	Reference Order ID	
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

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

Settings for Work Order Details and Assignment Detail Pages

Current Report - Print Work Order

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

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

Settings for New Work Order Page

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

Do not use FA defaulted PM Service for new PM WO's

This default setting determines whether new PM work orders use the defaulted PM Service.

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

Settings for Service/Inspection Due Page

This section of the page is where you decide on additional settings for the Service/Inspection Due page.

Eq PM Due Run ID Report

This field specifies which report is printed when the **RUNID** link is pressed on the Service/Inspection Due page. If you decide to change the default report, please be aware that it only takes three inputs: RunID, Open WOs, and Reason Due.

Current Working Location
Current Location: RGLOC1-LOC

Services and Inspections Due: 3 for Run ID 879

☐ Open Work Orders for All Units Listed ☐ Group services due onto one work order per equipment unit

Open Work Orders

Equip ID/ Desc	Reason Due	Task or Job Code	Date Due	Days Late/ (Early)	Meter 1 Late/ (Early)	Meter 1 Due	Meter 2 Late/ (Early)	Meter 2 Due
☐ RGCAR31	DATE	A	2008-09-05	92	7000	0	900	
☐ RGCAR101	DATE	A	2008-09-05	31	(2400)	3000	200	
☐ RGCAR7	DATE	A	2008-09-05	31	(3000)	3000	(100)	

Current Filter: [v]
PM Service: A, Include Services Soon Due by Meter: N, Exclude Services on Open Work Orders: N

Define Filter Clear Filter

What do you want to do?
Back



Note: If your organization does not use meter information with services and inspections, it is possible to hide the meter columns via UI controls. Refer to the *Administrator Guide, User Interface (UI) Options* section for information about modifying the UI.

Settings for Service Request Detail Page

The setting in this section is specific to the Service Request Detail page.

Current Report - Print Service Request

This field specifies which report is printed when the Print Service Request button is pressed on the Service Request/Defects page.

Settings for Accrual Balance

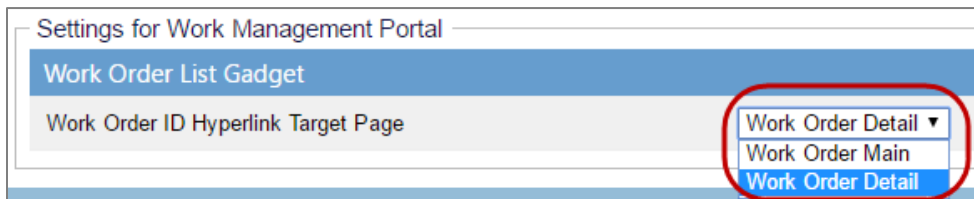
Display Accrual Balance: When this option is checked, the accrual balance will display on timecards, timesheets, and indirect postings.

Work Management Portal Settings

The setting in this section is specific to the Work Order List Gadget in the Work Management portal.

Work Order ID hyperlink target page

This field specifies whether the Work Order Detail or Work Order Main page displays when you click the Work Order ID hyperlink in the Work Order List gadget. Select the desired target page from the drop-down box (Work Order Main, or Work Order Detail).



Asset Search Gadget

Compare search term to – This setting will determine if the gadget searches all supported facets for an asset or behaves like the Technician Portal which directly tests against AssetID and supports ambiguity resolution if no direct match is found.

Finishing Setup

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

Continue to the sections below for information about how to configure information to display in the gadgets.

4. Setting up Gadgets

There are many gadgets available for setup. This section only goes over the admin settings for the following gadgets. For a complete list of gadgets and gadget information, refer to the *Work Management User Guide*.



To learn more about customizing your gadget layout, refer to the *Custom Gadget Layout – Reference Guide*.

Work Summary Gadget

Work Summary Add/Edit Filter						
Filter	Edit	Saved Filter	Planning	Pending	Open	Finished
		ALL	34	11	235	16
☐		DATE_FILTER	34	3	0	0
☐		CONSIST_TEST	0	0	4	0

To configure the types of work orders to display in the Work Summary gadget, follow the steps below:

1. Click the Edit pencil.
2. Fill out the Define Work Management Filter.
3. Name the filter.
4. Click the **Save** button to save the setting.

The filters display the results based on the setting.



Additional filters can be created and applied. Check the box next to each filter you would like applied to the work order search.

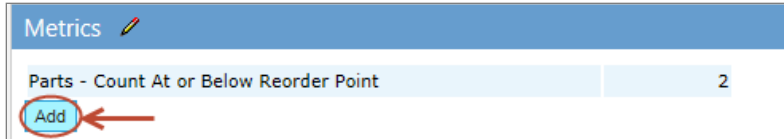
Metrics Gadget

The Metrics gadget allows you to display work based on a variety of Ad Hoc Query and other KPIs (key performance indicators).

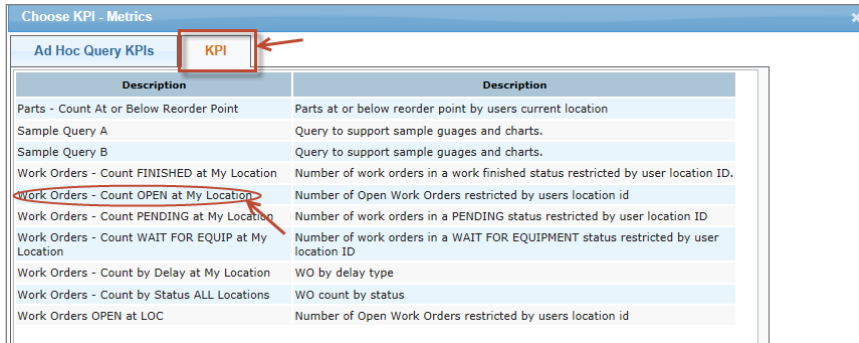
Adding KPIs to the Metrics Gadget

To add a metric to the Metrics gadget, follow the steps below.

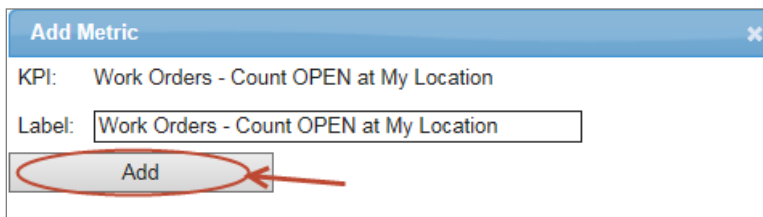
1. Click **Add**.



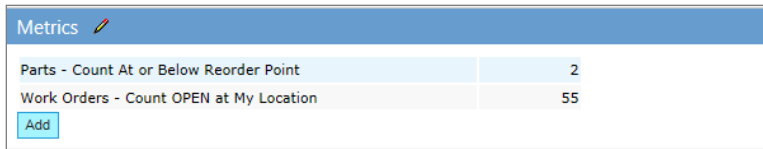
- From either the Ad Hoc Query KPIs or KPI tab, click on the desired KPI.



- Enter a Label name and click the **Add** button.



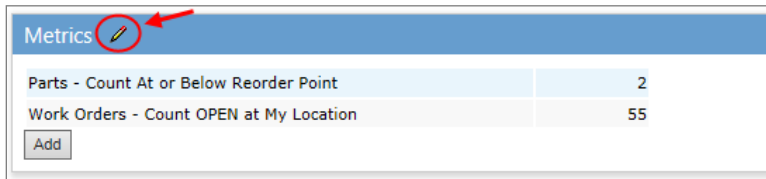
- The Metrics gadget displays with the new KPI.



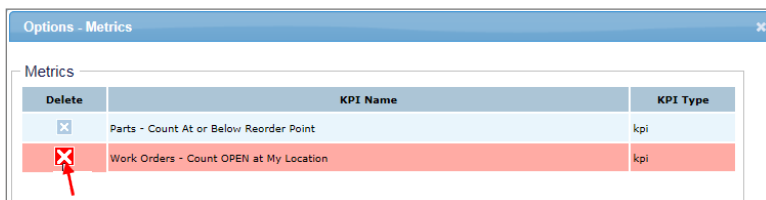
Deleting KPIs from the Metrics Gadget

To delete a KPI from the Metrics gadget, follow the steps below.

1. Click the Edit  pencil.



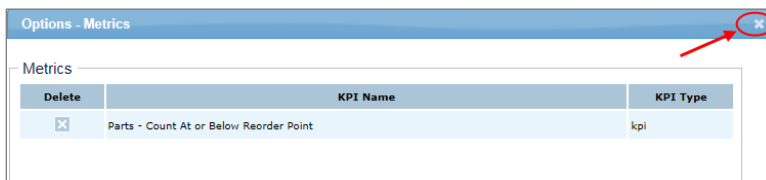
2. Click the Delete **X** button to remove a KPI from the gadget.



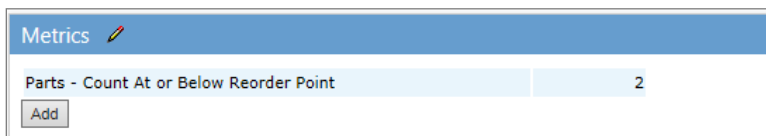
The metric no longer displays in the Options – Metrics pop-in list.



3. Click the **X** in the upper right corner of the Options-Metrics pop-in.

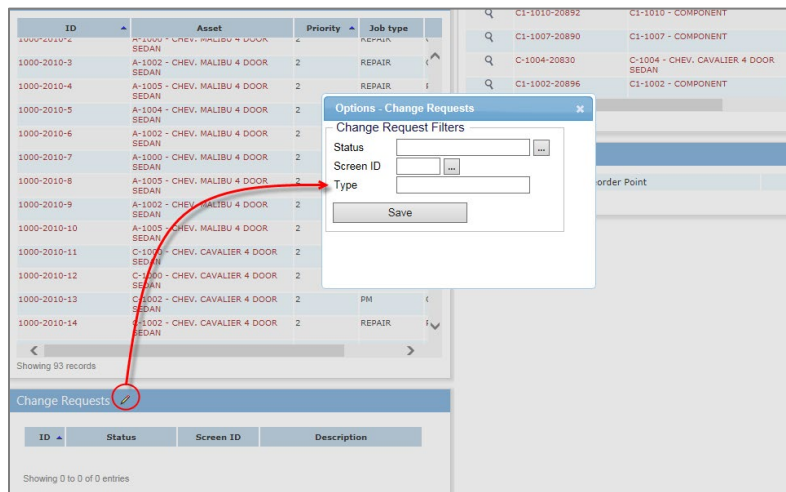


The KPI no longer displays in the Metrics gadget on the Work Management Portal.



Change Requests Gadget

Click the Edit  pencil to set Status, Screen ID, or Type of Change Request to display in the Change Requests gadget.



After you have finished configuring Shop Activity's Work Management Portal settings, exit your browser and open a new browser window prior to using the Work Management Portal tab to view or update data.

Please refer to the *Shop Activity Work Management User Guide* to understand how to use this portal to best meet your work management needs.

Employees Gadget

Click the edit pencil  to choose to show the employee list table or to view your direct employees.

