

Version 25



Trapeze

Enterprise Asset Management

Work Management

User 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.

Work Management - User Guide

Version 25.x

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1. Overview

This guide details the Shop Activity Supervisor and Work Management portals, and how to use these portals to best meet your work management needs.



Note: It is recommended to use the Work Management portal for all supervisor and work management needs. Throughout this guide, all processes are written using the main workflows from the Work Management portal, with references to workflow differences using the Supervisor portal.

The Shop Activity Work Management and Supervisor portals give your organization's maintenance supervisors, lead technicians, or any users having responsibility over maintenance tasks immediate access to relevant data based on their work management needs. While the Supervisor portal uses the legacy front page, the Work Management portal uses a highly versatile front page consisting of customizable gadgets to give access to all the screens and functions required during their workday. The most important customization 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, including those used in public works, transits, fleet, IT, etc.

The portals display and update data based on the logged-in user's associated Employee ID. As such, for a user to use Shop Activity, that user's ID must have a valid associated Employee ID.

Users can use the Shop Activity Work Management portal to do the following:

- View and assign work
- View current status of employees on shop floor
- View equipment repair history, service requests, and messages
- Request or issue parts for work orders and view status of past requests and issues
- Post after-the-fact parts, commercial and labor information to work orders
- Place work orders into and out of delay status
- Create and update test results related to work orders
- Enter complaint, cause, and correction detail (3 Cs) for repairs performed
- Add comments and notes to work orders
- Create new work orders for assets, production runs and inventory rebuilds
- Place work orders into WORK FINISHED status
- Place work orders in CLOSED status

- Create new service requests
- Assign employees to existing work orders
- Schedule work
- Review and close work orders
- Monitor vehicle availability statistics
- Transfer/defer repairs

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



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

Requirements

Application 25.x

Web Modules 25.x

Assumptions

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

- ❗ User-defined required fields that do not appear in the Web Modules will return validation messages.
- ❗ Special characters cannot be placed into the Web Modules fields or unanticipated results may occur. This includes any character that cannot be typed with a standard keyboard.
- ❗ Do not use the browser's **Back** button as unanticipated results may occur. Use the Back button in the module pages themselves to return to the previous page in the Web Modules.
- ❗ 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. Portal Home Page

After successfully configuring the Shop Activity Work Management and Supervisor portals, the portals are available for use. Log into the Web Modules and click the Work Management or Supervisor portal tabs.

Work Management Home Page

The Work Management portal home page enables users to select a Current Working Location with options to customize the layout, filter, and refresh data. Several buttons display along with default Gadgets including: Asset Search, Work Summary, Employees, and Work Orders (on the left side of the page) and Go To Work Order, Service Requests, and Metrics (on the right side of the page).

Work Management Portal

Current Working Location

1 - OPS

Layout

Refresh

OFF

View Calendar

Multi-asset WO

Crew Management

Service/Inspection Due

Direct Charges - Commercial

Asset Search

Eq ID - License # - Asset # - VIN

...

Go

Go To Work Order

1

Year

2019

No.

Go

Work Summary

Add Filter

Filter	Edit	Saved Filter	Planning	Pending
		ALL	0	0

<

>

Employees

0 Assigned to Me

Service Requests

Zoom	ID	Asset	Pr
Q	RAIL CAR-1-2941854	RAIL CAR-1 - 1956 ACME NONE==Meters: 1-0 NONE; 2-0	1

The Supervisor Home Page

The Current Working Location drop-down and the Action section buttons are covered by the following pages in this section. The rest of the functionality of this home page is covered in the [Gadgets](#) section below. For example, the Employee Management button functionality is covered with the process information in the [Employees](#) gadget section.

My Workshop Portal

Current Working Location: 1 - OPS

Location Shop Activity

- 2 Assigned to me
- 2 Clocked in
- 0 On work orders
- 0 On indirect
- 0 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

Location Work Orders

	Pending SRs	Pending	Open	Work Finished
All Asset Types	0	0	6	2
ASSET	0	0	5	2
COMPONENT	0	0	0	0
LINEAR	0	0	1	0
RAIL	0	0	0	0
STATIONARY	0	0	0	0
INVENTORY REBUILDS			0	0

Production Run Work Orders

ASSETS			0	0
INVENTORY REBUILDS			0	0

Equipment Management

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

Actions

View Calendar | Multi-asset WO | Work Order Management

Review and Close | Service/Inspection Due

Home Page Action Buttons

The home page action buttons provide links to larger areas of functionality within the portal. These buttons are found in the following places for the two portals. Buttons below are separated into three categories:

- Standard: Available on both the Work Management and Supervisor portals.
- Work Management: Available on the Work Management portal only.
- Supervisor: Available on the Supervisor portal only.

Work Management Portal

Work Management Portal

Current Working Location: 1 - OPS | Layout | Refresh: OFF

View Calendar | Multi-asset WO | Crew Management | Service/Inspection Due | Direct Charges - Commercial

Asset Search

[Eq ID - License # - Asset # - VIN] ... Go

Go To Work Order

1 | Year: 2019 | No. [] | Go

Supervisor Portal

My Workshop Portal

Current Working Location 1 - OPS

Location Shop Activity

2 Assigned to me
2 Clock in
0 On work orders
0 On indirect
0 Pending part return requests

Employee Management

Part Return Requests

Location Work Orders

	Pending SRs	Pending	Open	Work Finished
All Asset Types	0	0	6	2
ASSET	0	0	5	2
COMPONENT	0	0	0	0
LINEAR	0	0	1	0
RAIL	0	0	0	0
STATIONARY	0	0	0	0
INVENTORY REBUILDS			0	0

Production Run Work Orders

ASSETS			0	0
INVENTORY REBUILDS			0	0

Availability

Filter

0 Spares
0 Vehicles Required
0 Vehicles Assigned
0 Vehicles Unavailable

Manage Availability

Equipment Management

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

View Calendar

Multi-asset WO

Work Order Management

Review and Close

Service/Inspection Due

Standard

Current Working Location

In the **Current Working Location** drop-down, select the shop in which you would like to view or manage the work. The location selection updates the current Shop Activity information, and the current work order information on the page. The locations that display in the drop-down are limited based on your system access settings (Employees – Primary Information screen, Assignment Info tab, Supported Locations).

View Calendar

This button opens the Shop Calendar to assign work to employees and manage the schedule. Refer to the [Shop Calendar](#) section for more information about the Shop Calendar.



Note: The View Calendar button does not display if the current location has **Shop scheduling active** option disabled on the Locations – Primary Information screen, Functions tab.

Multi-asset WO

Use the **Multi-asset WO** button to open the Multi-asset Work Orders page. This portal enables you to create a parent work order to collect a group of related child work orders. This functionality is great for cases where common actions – such as cleaning services or visual inspections – are performed on multiple assets at the same time, possibly by a crew of employees.

When you click the **Multi-asset WO** button, the Multi-asset Work Orders Management page opens. Refer to the [Multi-asset Work Orders](#) section below for more information about this area.

Current Working Location

Current Location ACA - ASSET CENTRAL ADMINISTRATION Status OPEN

Multi-asset Work Orders: 15

Expand All Collapse All

Parent Work Order	Title	Assets
ACA-2018-390	Task Order WO - Visual Inspection - Assets	ASSET-001, ASSET-002
ACA-2018-394	Task Order WO - Visual Inspection - Assets	ASSET-003, ASSET-004, ASSET-005, ASSET-006, ASSET-007
ACA-2018-475	Task Order WO - Visual Inspection - Assets	ASSET-008, ASSET-009, ASSET-010
ACA-2018-502	Task Order WO - Visual Inspection - Assets	ASSET-011, ASSET-012
ACA-2018-507	Task Order WO - Visual Inspection - Assets	ASSET-013, ASSET-014
ACA-2018-510	Task Order WO - Visual Inspection - Assets	ASSET-015, ASSET-016
ACA-2018-515	Task Order WO - Visual Inspection - Assets	ASSET-017, ASSET-018
ACA-2018-530	Task Order WO - Visual Inspection - Assets	ASSET-019, ASSET-020
ACA-2018-546	Task Order WO - Visual Inspection - Assets	ASSET-021, ASSET-022, ASSET-023

Back

New Multi-asset WO

Service/Inspection Due

Click the **Service/Inspection Due** button to open the Service and Inspections Due page. For more information, refer to the [Service/Inspections Due](#) section.

Work Management Only

Crew Management

Click **Crew Management** to review and manage employee labor.

The Crew Management page displays.

Crew Management

Current Working Location: LOC1 - HEAVY EQUIPMENT

Crew: CREW1 - CREW 1

Current Crew Activity

Crew Foreman: EMP-A

Employee ... ☐ Primary Crew

Action Clock In Override Task/Clock Out Time:

☐	Postings	Employee ID	Employee Name	Clocked In Date/Time	Time Code	Current Task	Jobbed On Date/Time	Elap Time
☐		EMP-AC2		09/05/2017 11:27	REG	Task: IND-MT - MEETINGS	08/15/2018 08:11 Time Code: REG	
☐		EMP-AC3		08/08/2014 08:45	SC			

From this page, supervisors have access to all schedulable crews assigned to their current working location. Information for each employee on the crew is shown and actions can be performed on a range of employees including: Clock In, Clock Out, and Stop Task.

Review Timesheets Button

Click this button to open the Time Card page to review a timesheet for an employee, a crew, or direct employees. Click the **Employee** chooser button to search for and select the correct employee. The results for the employee search displays only employees at the locations available to the current logged-in user.

Review Timesheet Summary Button

Click this button to open the Timesheet List Filter to review timesheets. View and edit direct employees' timesheets, or view your own timesheets.

Indirect Time

To post indirect time:

1. Click **Indirect Time** to post indirect time, such as meetings, breaks, etc., which can be done in real-time.

 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.

The Choose an indirect task ID page will display.

2. Select the **Location** from the drop-down, enter a **Comment**, and click an **Indirect Time Code** button.
3. Complete the fields in the **Start Task** pop-in and click **Post Task** to post the indirect labor.

Crew Time Entry

Click the **Crew Time Entry** button to open the **Post Work Order Crew Labor** pop-in. From this pop-in you can add crew postings and manage work orders assigned to crews. Refer to the [Crew Workflow](#) section for more information.

Direct Charges – Commercial

The **Direct Charges – Commercial** button opens the Commercial Work Direct Charges pop-in. Use this pop-in to add charge information to a commercial posting. Fields include Asset ID, Department ID, Account ID, Date, Task ID, Vendor ID, Vendor Contract ID, Contract Line Item ID, Reversal, Labor Cost, Parts Cost, Misc Cost, Labor Hours, Vendor Invoice, Invoice Date, Fail/Cause ID, Comments, Miscellaneous 1 through 4, Fiscal Year, Document Number, and the Path and File Name field to add any files or images needed for the charge.

This functionality is only available in the Work Management portal.

To add a charge:

1. Fill out the information fields.



Note: If the Vendor Chooser option is enabled in the portal settings, clicking the chooser button for the **Vendor ID** field 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 9397

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.

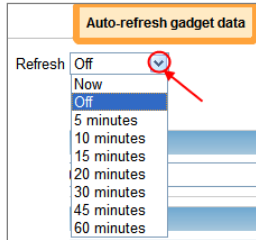
2. Click **Add**.

The line is added to the Pending Direct Charges section in the bottom of this pop-in.

- Once an item has been added below, you can update the data for that line. Click the line, change the information in the fields above, then click **Update** (the **Add** button changes to **Update** when a field is changed).
3. To add information for multiple items, change the asset ID, or other information fields, and click **Add** for each additional charge. This form will not reset until you click **Save**, and the items are added to the posting.
4. When you are finished adding lines, click **Save**, or click **Cancel** to discard any items you have added and close the pop-in.

Refresh

Select the frequency of how often you want to automatically refresh the gadget data. This button applies to the Work Management portal only.



Layout

This button allows you to customize your gadget layout to organize it as needed. The Layout button only applies to the Work Management portal, as it is a gadget-based portal.



To learn more about customizing your gadget layout, refer to the *General Application Information* guide.

Supervisor Only

Review and Close

Clicking **Review and Close** to open the Work Order Review/Closing page. This page is where supervisors review and close out finished work orders. Refer to the [Work Order Review/Closing Page](#) section below for more information about this page.

Work Order Management

Click **Work Order Management** to open the Work Order Management page. On this page, you may create a Filter so your default Work Order Management page displays each time you click the **Work Order Management** button. This page provides supervisors with an overview of the Work Orders and pending Service Requests in their shops. Refer to the [Work Order Management Page](#) section below for more information regarding this page. This button is only available on the Supervisor portal, however, users using the Work Management portal can access this page by clicking a link in the Work Summary gadget.

Crew Time Entry

Click **Crew Time Entry** to open the **Post Work Order Crew Labor** page. From this page you can add crew postings and manage work orders assigned to crews. Refer to the [Crew Workflow](#) for more information.

Creating Filters

The Work Management portal allows supervisors to create user-defined filters that feed the gadgets so data may be customized and presented based on their individual work management needs.



Note: User-based Asset Chooser filters cannot be saved as location default filter.



Note: Custom filter information can be managed through the Enterprise Portal by going to the Custom Filters screen.

Filters affect data in the following gadgets:

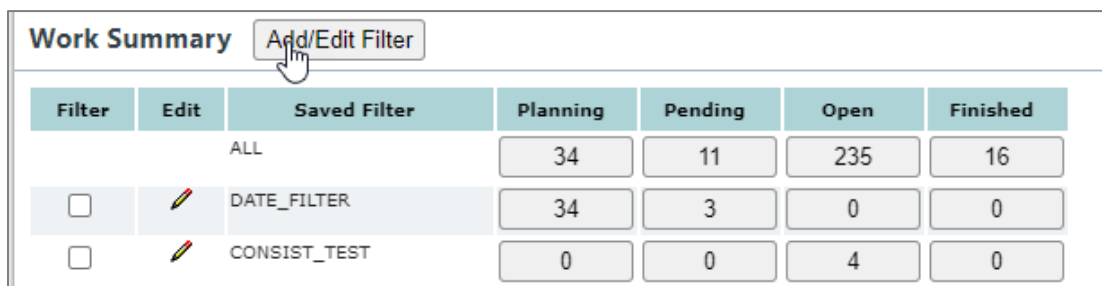
- Work Summary
- Work Orders
- Service Request
- Service Request Summary

Filter characteristics include:

- The default filter is ALL equipment assets (not including part rebuilds) at the Current Working Location.
- Filters are stored per location and per user.
- Each location and user can define multiple filters.
- Users cannot share filters with other users.

Create a New Filter

1. In the Work Summary or Service Request Summary gadgets, click **Add Filter**.



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

The Define Work Management Filter page displays where filters are organized into Asset Filters, Work Order Filters, Service Request Filters, and Additional Filters.



Note: Service request filters and work order filters only display in the pop-in according to the gadget from which you clicked **Add Filter** (for example, work order

filters display with the Work Order Summary gadget). The filter setup works the same for both gadgets.

The screenshot shows two sections: 'Asset Filters' and 'Work Order Filters'. The 'Asset Filters' section includes fields for Asset Chooser Filter, Asset Type, Equipment ID, Station Location, Asset Category, Equipment Type, Department ID, Service Status, Maint. Class, and Segment ID. The 'Work Order Filters' section includes a checkbox for 'Include Work Orders' and fields for Rebuild Part ID, Rebuild Part Suffix, Delay Code, Repair Reason, PM Service, and Rebuild ID.

2. Define a filter by selecting from the drop-down boxes and choice-lists as desired.
3. In the **Save Filter as** field, enter a name for the filter then click **Save** to save your filter.

The screenshot shows the 'Record Type' set to 'Service Requests'. The 'Save Filter as' field contains 'open SR'. There are buttons for 'Save', 'Share', and 'Reset Filters'. A 'Delete' button is also present next to the 'Record Type' dropdown.

 Note: Administrators can share the filter as a default filter for a location by using the **Share** button (which is only available for administrators). Default location filters display as bolded in filter drop-down menus and are applied to gadgets that use filters in this portal.

The screenshot shows a filter drop-down menu with the following options: 'Location Default Filters' (bolded), 'Car01', 'My Filters', and 'Car01User'.

To add locations for this filter to apply:

- i. Click **Share**.

The screenshot shows the 'Record Type' set to 'Service Requests'. The 'Save Filter as' field contains 'open SR'. The 'Share' button is highlighted with a red circle. There are buttons for 'Save', 'Share', and 'Reset Filters'. A 'Delete' button is also present next to the 'Record Type' dropdown.

The Save as Location Default Filter pop-in displays.

- ii. Click **Select** to open the Locations pop-in.

The dialog box is titled "Save as Location Default Filter". It contains two sections for configuration:

- Apply to These Locations:** This section includes a "Location(s)" label, a "Select" button, a list box, and "Remove" and "Remove All" buttons.
- Share with These User Groups:** This section includes a "User Group(s)" label, a "Select" button, a list box, and "Remove" and "Remove All" buttons.

At the bottom of the dialog are "Cancel" and "Save" buttons.

- iii. Choose the locations from the list as needed.
- iv. To remove a location from the list, select the location in the right pane, and click **Remove**, or click **Remove All** to remove all added locations.

This interface shows a list of locations. At the top are "Search", "Reset", and "Add first 100 items" buttons. A list box below contains the number "1". At the bottom are "Remove", "Remove All", and "Apply" buttons. The "Remove" and "Remove All" buttons are highlighted with a red circle.

- v. Click **Apply** to add the selected locations to the layout options pop-in.
- vi. Choose groups to share the filter with from **the Share with These User Groups** section in the same way as selecting a location.
- vii. Click **Save**.

A verification message displays warning about overwriting other default filters.

The verification message dialog box contains the following text: "This will overwrite any Location Default Filters with this name at the chosen locations. Do you wish to continue?". At the bottom are "OK" and "Cancel" buttons.

viii. Click **OK** to save the filter.

Filter saved displays with a successful save.

4. Click the **X** in the upper, right corner to close the screen.

You are returned to the main screen, and the Work Summary filter list is now updated.

5. Continue creating new filters by repeating steps 1-3.

The newly saved filters display in the Work Summary Gadget area.

The Work Management portal also provides more flexibility with filtering based on Work Management Classification (WMC) settings. When you set up your filter in the Work Management portal, you may set up the lower-level locations (DO NOT INCLUDE, INCLUDE ALL, ONLY LOWER LEVEL) in the **Additional Filters** section of the Define Work Management Filter page.

Create A Filter Based on Work Management Classification (WMC) Settings

Example 1:

This example creates a filter that only shows your top location (called Top Location Only).

1. In the **Lower-level Locations** drop-down menu, in the Additional Filters section of the Define Work Management Filter pop-in, select **DO NOT INCLUDE** and click **Save**.

*After clicking **Save** and exiting the pop-in, if you check the Filter column's checkbox for the newly created filter, work orders (or service requests in the Service Requests gadget) at your location or tasks assigned to your location will display, as shown below:*

Work Summary [Add Filter](#)

Filter	Edit	Saved Filter	Planning	Pending	Open	Finished
☐		ALL	0	0	6	2
☐		Car01User	0	0	6	2
☐		Top Location Only	0	0	6	2
☒		Car01	0	0	3	1

Work Orders

ID	Assignment Status	Asset	Priority	Job
1-2017-38	Assignments	CAR01 - 2006 JEEP GRAND CHEROKEE==Meters: 1-20100	1	REPA
1-2017-23	Assignments	CAR01 - 2006 JEEP GRAND CHEROKEE==Meters: 1-20100	3	PM
1-2017-37	N/A	CAR01 - 2006 JEEP GRAND CHEROKEE==Meters: 1-20100	3	PM
1-2017-41	Assignments	CAR01 - 2006 JEEP GRAND CHEROKEE==Meters: 1-20100	3	REPA

Showing 4 records



Even if the work order is not at your location but one of the tasks is assigned to your location, it will display. This level shows the work that is specific to you.

Example 2:

This example creates a filter that shows top-level and lower-level location work orders and tasks with no one assigned to them (called Unassigned Work).

1. In the **Lower-level Locations** drop-down menu, in the Additional Filters section of the Define Work Management Filter pop-in, select **INCLUDE ALL**.
2. In the **Assignment Status** drop-down menu, select **UNASSIGNED**.

PLANNING

Assignment Status: **UNASSIGNED**

Approval Status:

Start Date From:

Start Date To:

Is Multi-asset:

Additional Filters

Lower-level Locations: **INCLUDE ALL**

3. Click **Save**.

Define Work Management Filter*

Record Type: Work Orders

Save Filter as: **Unassigned Work** **Save** Save as Location Default Reset Filters

Display Order: Color Code:

Asset Filters

Example 3:

This example illustrates a situation where two employees are assigned to the work order (at the work order level). With the work management classification (WMC), it only assigns the technician to the task that the technician supports by location or work management classification, and any task that does not have a work management classification. In other words, the work orders that have two employees assigned have no WMC defined, and the work orders that have one employee assigned have a WMC defined.

Work Assignment Detail

Asset ID

CAR01: EQTYPE

Asset Number

ASSET001

Station Location

1 - OPS

License Number

SPOKAN01

Repair Location

1 - OPS

Operator Name

SR

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 02:00 AM

Priority

1 - EMERGENCY/IMMEDIATE

Assigned: 2

Assigned

Assigned to Work Order

Unassign

Employee

Unassign

Employee

Tasks: 3

	Task ID	Description	Est Hours	WAC
☐	2.3.001	ELECTRICAL SYSTEM	4.00	
☐	2.3.CNT	CN REPAIR GROUP	0.00	
☐	2.3.TH-	ELECTRICAL REPAIR GROUP	6.00	

Unassign Checked

Edit Assignments

Vendor

...

View

Crew

...

View

Employee

...

View

To Task(s)

Work Order

Task

Basic Info

WORK ORDER

Service Status

...

Vendor

...

Contact Name

...

Phone

Back

View Calendar

New Appointment

The screenshot below shows a task that only supports electrical WMC. If you add another electrical task to the work order, it will automatically assign the electrical task to that employee (Sharon). On the technician side, Sharon will see all the tasks for the work order, and the assignment clipboard will display next to those she is assigned to.

Tasks: 4

☐	Task ID	Description	Est Hours	WAC
☐	1 001	ELECTRICAL SYSTEM	4.00	
		Employee Assigned to Task	Posted Hrs	Status
		S02 - SHARON	0.00	
☐	2 001-115	ELECTRICAL - CIRCUIT BOARD / PRINTED C.B.	0.00	
☐	2 CNT	CN REPAIR GROUP	0.00	
☐	2 TH-	REPAIR GROUP	6.00	

Unassign Checked

Likewise, if the WMC for another type of repair is defined for another employee, it will be assigned to them if others like it are added to this work order.

3. Gadgets

Gadgets are customizable tools that provide data based on user-defined filters. A gadget is either single-instance or multiple-instance.



Note: To use the Enterprise Portal screen hyperlinks in gadgets, the logged-in user must have access to the screens for these screens to open and be able to edit items as explained below. If your user does not have rights, these pages will display an error and not open.



To learn more about customizing your gadget layout and standard gadgets, refer to the *General Application Information* guide.

- **Single-instance Gadgets:** gadgets that are limited to one instance per layout (location/user).
 - Action Items
 - Asset Search
 - Asset Faults
 - Capital Project Overlap
 - Employees
 - Go to Service Request
 - Go to Work Order
 - Map
 - Part Labels
 - Part Search
 - Pending Requests
 - Service Request Summary
 - Service Requests
 - SLA – Asset Availability
 - Work Orders
 - Work Planning Projects
 - Work Summary
- **Multiple-instance Gadgets:** gadgets that can have more than one instance per layout (location/user).
 - Capital Projects
 - Change Requests
- **Standard Gadgets:**
 - Ad hoc Query
 - Metrics
 - URL

For more information about single-instance gadgets, refer to the [Single-instance Gadgets](#) section below.

For more information about multiple-instance gadgets, refer to the Multiple-instance Gadgets section below.

Single-instance Gadgets

Single-instance gadgets can have at most one instance per layout (location/user).

The following gadgets support the portal setting "Show work orders based on responsible location" which can be enabled on the Shop Activity - Work Order Center – Basic Info screen. When enabled, the responsible location to the given user's current location context will be used.

The following sections provide information about the single-instance gadgets.

Action Items

Action Items

☐ 1 Pending Part Return Requests **Part Return Requests**

☐ 0 Work Orders Awaiting Approval

☒ 3 Work Orders to Review **Review and Close WOs**

Search...

ID	Type	Asset
ACA-2018-258	Work Order Awaiting Closure	
ACA-2013-9	Work Order Awaiting Closure	
ACA-2013-8	Work Order Awaiting Closure	

Showing 3 records

The Action Items gadget displays three filters for quick access to certain actions: Pending Part Return Requests, Work Orders Awaiting Approval, and Work Orders to Review. Each action item allows you to properly display related data and links to perform actions on them. Refer to the [Approving Part Return Requests](#), and [Work Order Review/Closing Page](#) sections for more information.

The **Part Return Requests** button displays only if your settings require supervisors to approve part return requests. If configured as such, then it is enabled only if there are pending part return requests.

Select the check box next to the filter-type in order to view the associated action items.

- ✓ The Work Orders Awaiting Approval filter includes PENDING and OPEN work orders. These work orders will only display if your working location has the "Explicit approval required for work orders" setting enabled on the Locations screen.

To access part return request functionality in the Supervisor portal, click **Part Return Requests** in the Location Shop Activity area.

Asset Search

The fields the asset search uses can vary depending on the settings chosen by the admin.

 For more information, refer to the *Shop Activity Work Management Administrator Guide*, *Common Settings* section for the **Search to include the following fields** setting with **Use Asset Chooser instead of Choice-list** options.

To access this functionality from the Supervisor portal, use the Equipment Management search field.

To start a new work order or look up existing open work orders, enter or scan an equipment ID, license number, asset number, or VIN in this search field.

After entering an equipment ID, license number, asset number, or VIN, click **Go** to link to the Equipment Management page to filter gadgets, search assets, and create work orders. Refer to the [Equipment Management Page](#) for more information about the page.



This gadget uses legacy, portal-wide settings, which are editable only by module administrators.



When typing into this gadget, the filter-driven gadgets (for example Work Orders, Pending Requests , and Service Requests) are further filtered to match the search text. To undo the filter, delete the typed text.

Using the Search Field

There are two ways to search for items in the **Search** field. One way uses the Asset Chooser and one uses the legacy asset choice-list. These options are set by the administrators for the portal.



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

Asset Chooser

Enter a partial entry and press **Enter** or click **Go**, or click the  button to use the Asset Chooser to select an ID. For more information on the Asset Chooser, refer to the *General Application Information Guide*.

- Chooser : Click the chooser button to open the asset chooser to search for the specific item you need. Use this when you only know part of the ID or number you need.
- **Go**: When you have entered a unique identifier of an item, click **Go** to go directly to the item to start a new work order, see details of the asset, etc.

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

Choice-list

Type an asset ID, asset number, VIN, license number, etc. into the search field and click **Go**, or click the chooser button to use the choice-list.

- Chooser : Click the chooser button to open the asset choice-list to search for the specific item you need.
- **Go**:
 - When you have entered a unique identifier of an item, click **Go** to go directly to the item to start a new work order, see details of the asset, etc.
 - If you know part of the ID or keyword, enter that part with wildcards and click **Go** to open a list of assets that match that entry. This can include a partial match

using % such as CAR% that will return assets that start with CAR. 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 Part Rebuild Work Orders](#) section for more information.



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	Status
CAR01	ASSET001	SPOKAN01	100-JGC-1987	2006	JEEP	GRAND CHEROKEE	A - ACTIVE
CAR02			2345678910	1997	CHEVROLET	BLAZER	A - ACTIVE
CAR03			ABC1234567	2017	JEEP	GRAND CHEROKEE	A - ACTIVE

If multiple items match, click the correct ID from the list. When you select an item, you are directed to the specific page as outlined in the setup scenarios below.

After Selecting an ID

After using either chooser to find the correct ID, your organization's 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 [Equipment Management Page](#) or [New Work Orders](#) sections below for more information about these pages.

According to your setup, you can perform the following tasks:

- If your setup allows only one OPEN work order for an asset:
 - If the asset has an open work order, the Equipment Management page opens 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, select a work order from the list of open work orders. The [Work Order Main Page](#) or [Work Order Details Page](#) opens.
- If your setup allows more than one OPEN work order per asset:

- If the asset you enter has any open work orders, the [Equipment Management Page](#) opens. This page lists open work orders for the asset and you may choose the desired work order or create a new work order.
- If there are no open work orders, the Equipment Management page opens where you can create a new work order. Refer to the [New Work Orders](#) sections below for more information about creating new work orders.

Asset Alerts/Faults

This gadget allows you to view alerts and their fault codes along with the number of times the fault occurred. You can also report a new alert and view the history of all alerts/faults for a particular asset.

Asset Alerts

Report New Alert

View History

DateTime Reported	Alert ID	Asset ID	Fault Code	Description	Reported By
11/07/2019 6:45 AM	426	GI-PH-2019-0001 	J3918	TAMPER CIRCUIT FAILURE	
11/07/2019 6:45 AM	427	GI-PH-2019-0001 	J3918	TAMPER CIRCUIT FAILURE	

Asset Faults			
View Faults		New Fault	
	Reported By	Times Occurred	Service
==Meters: 1-0 MILES;	SYSADMIN	20,411	GI-PH-2020-000
(5 MILES , 0 NONE)	SYSADMIN	4,264	
==Meters: 1-0 MILES;	SYSADMIN	35	GI-PH-2020-000
==Meters: 1-0 MILES;	SYSADMIN	46	GI-PH-2020-000

Capital Project Overlap

This gadget shows overlap between multiple projects. After choosing a time frame, project segments that overlap within that time period display. Click the red project ID hyperlink to open that project in the Capital Projects screen.

Capital Project Overlap 				
Project ID	Description	Type	Status	Planned Start
20180419-00002	CAPITAL PROJECT	PROJ-TYPE-000	CAP-PROJ-STAT-003	06/19/2018

Showing 1 record

To set a time frame:

1. Click the edit pencil next to the gadget name.

The Capital Project Overlap Options display.

2. Click the **Months from Today** drop-down, and select the needed time frame for overlap options.
3. Click **Save** to save the new time frame, or **Cancel** to leave and discard any changes.

Employees

Use the Employees gadget to get a quick view of employee information. From here you can see information about items assigned to you, employees that are clocked-in, and information for work orders. Use the scroll bar to scroll to the right to see more information on each item. You can also click **Manage Employees** to open the [Employee Management Page](#).

- Click the red hyperlink in the **ID** column to open the employee's time card.
- Click the red hyperlink in the **Current Task** column to open the Time Card page.

Employees				
2 Assigned to Me				
2 Clocked In				
0 On Work Orders				
0 On Indirect				
<button>Manage Employees</button>				
ID	Name	Clocked In Date/Time	Time Code	Current Task
12345	Employee Name	10/10/2017 10:00		Task: IND-15-YARD CHECK
12346	Employee Name	10/10/2017 10:00	REG	
12347	Employee Name	10/10/2017 10:00	REG	
12348	Employee Name	10/10/2017 10:00	REG	
12349	Employee Name	10/10/2017 10:00	01	

Showing 5 records

To access the Employee Management page from the Supervisor portal, click **Employee Management** in the Location Shop Activity area.

Filters

Go to Service Request

The Go To Service Request gadget opens any service request where your employee supports its location.

Enter a valid service request number and click **Go** to open the Service Request detail page for that service request.

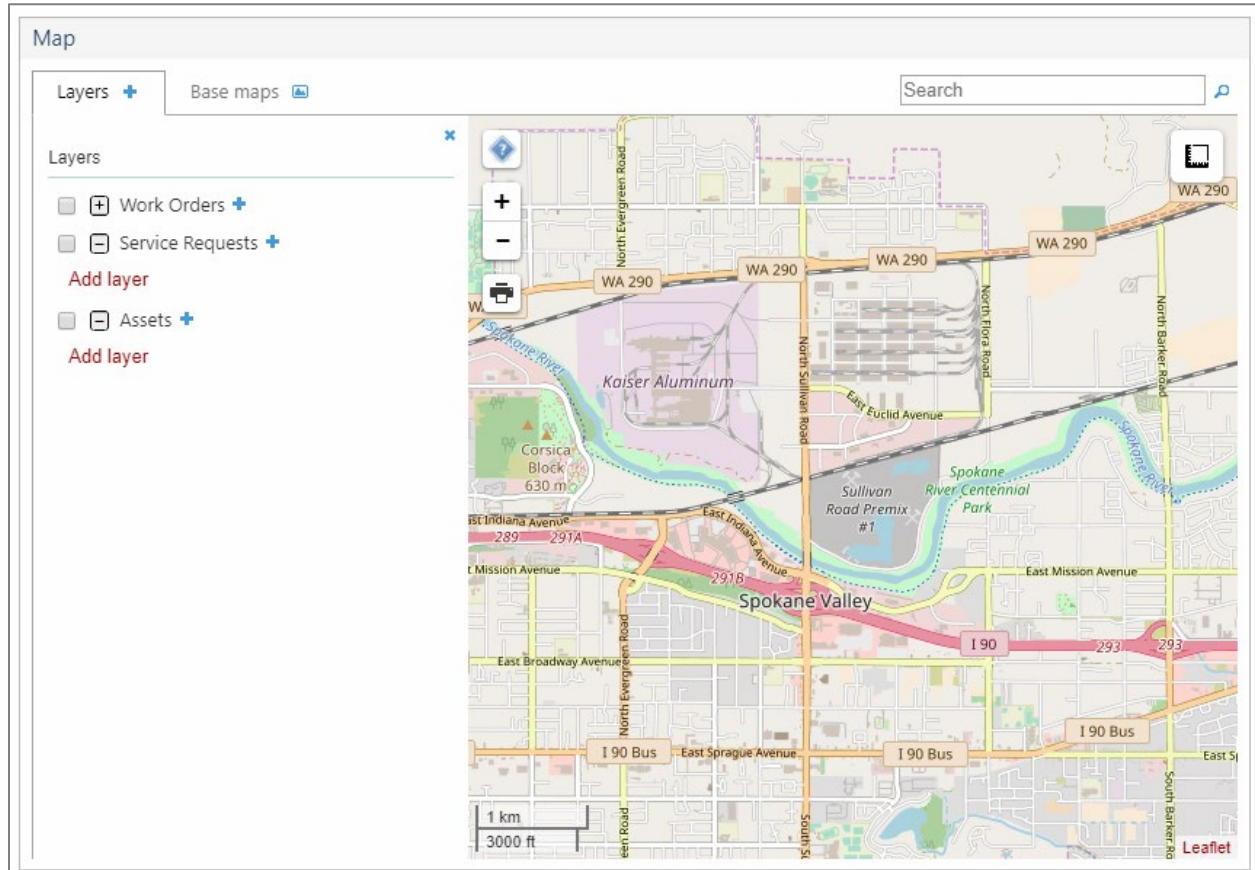
Go To Work Order

The Go To Work Order gadget opens any work order in the system to which the logged-in user has access rights. The default location is the current working location and the default year is the current client operating system/browser year.

Enter a valid work order number and click **Go** to open to the Work Order Main page to that work order. Refer to the [Work Order Main Page](#) for more information.

Map

The Map gadget is available to display assets, field equipment, and unassigned service requests and work orders from the saved available filters for the current user and location.



Equipment layer

The Equipment layer pulls data from the Employees gadget. The Employees gadget must be in the layout for data to be downloaded from the server. The employees must have an operator ID and be assigned through the Allocation and Assignment or Technician portal. This layer shows all assets assigned to the operator ID for each employee in the current list (Employee gadget).

Click the equipment icon to see the Equipment pop-in for specific equipment information.



Asset ID	RACAR1: 2012 HONDA&US CIVIC&US MOTOR POOL SEDAN LINEAR - TEST		
Asset Number	123	Station Location	LOCATION #1
Repair Location	LOCATION #1	Operator Name	RAOP - OPERATOR
Operator Phone	WORK		

Operator

Employee ID	AR	Employee name	ANNY
Email		Work phone	555-555-5555
Shift	A-SHIFT	Operator ID	AR
Availability	12:00 AM - 11:59 PM (23.98 hours left today)		Crew
			ARCREW

Assign Work
View Timecard

Assign Work: Click this button to open the Unassigned Work pop-in. This displays unassigned work and allows mass assignment to the vehicle or operator. Check the items to be assigned and then click **Assign To [Name]** to assign those items. This action may take time if a lot of items are chosen to assign at the same time.

View Timecard: Click this button to open the Time Card page.

Part Labels

This gadget allows you to reprint labels that were printed during various workflow processes.

Part Labels

Show labels for:
☒ Receipt
☒ Control
☒ Transfer
☒ Bin
☒ Rebuild
Show labels for days past

Search...

Print	Part ID - Suffix	Description	Keyword	Manuf. Part No
	10123-0	CONNECTOR, TUBING, CONNECTOR (AIR GAUGE) GP B-3-4 00-00-2197	CONNECTOR-TUBIN	

Showing 1 record

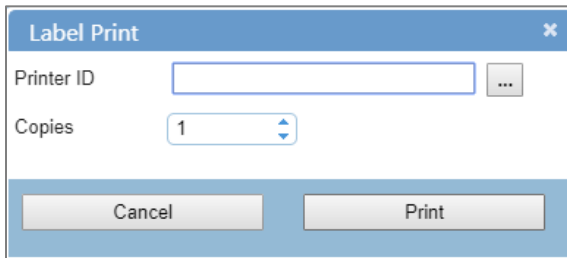
To use this gadget effectively, the system option **Track history of labels printed** must be enabled on the Parts – Setup – Options screen in Enterprise Portal in order to have the system record the data for labels when they are printed.

The gadget provides quick filters that are saved on a per-user basis, as well as many columns for data on the printed labels. It is recommended that users review the table to select the fields accordingly.

To reprint labels:

1. In the Part Labels gadget, in the Print column, click the printer icon.

The Label Print pop-in displays.

A screenshot of the 'Label Print' pop-in dialog box. It has a blue title bar with the text 'Label Print' and a close button (X). Inside, there is a 'Printer ID' field with a text input box and a small square button with three dots to its right. Below that is a 'Copies' field with a spinner box showing the number '1'. At the bottom, there are two buttons: 'Cancel' on the left and 'Print' on the right.

The Printer ID field is default if a default printer is set up.

2. Click the chooser button next to this field to change the printer as needed. The choice-list is then filtered to the printers with a label type that supports the selected label type.
3. Enter a new amount, or click the up and down arrows, on the **Copies** field to update the number of copies needed.
4. Click **Print** to reprint the label, or **Cancel** to exit the pop-in.

Part Search

A screenshot of the 'Part Search' gadget. It has a light gray header with the text 'Part Search'. Below the header is a text input field containing the text 'Rebuild Part ID'. To the right of the input field is a small square button with three dots, and further right is a 'Go' button.

Use the Part Search gadget to search part rebuilds. Entering a **Rebuild Part ID** (without the suffix) takes you to the New Work Order page for Rebuildable Parts. Refer to the [New Part Rebuild Work Orders](#) section for more information.

For more information on the behavior of the chooser button vs the Go button, refer to the [Asset Search](#) section.

Pending Requests

Pending Requests							
Work Order	Part	Qty	Status	Notify	Date requested ▼	Asset	For Task
BSLOC1-2013-7	GET SOME PARTS FROM NAPA	0.00	PENDING		05/02/2016 01:05 PM	12703	001-206
BSLOC1-2013-2	TEST PART REQUEST	1.00	PENDING		04/14/2016 11:34 AM	200	001-115
BSLOC1-2013-7	12865 - 0 - FILTER- AIR HVA; FILTER, AIR HVAC, LENGTH 16", WIDTH 18", THICKNESS	1.00	PENDING		07/03/2014 10:08 AM	12703	
BSLOC1-2013-2	BENPART1 - 0 - ABS SENSOR; SHORT DESCRIPTION OF THIS TEST PART	1.00	RECEIVED	✓	06/09/2014 07:56 AM	200	GNMTASK1
BSLOC1-2013-2	19426 - 0 - BOLT-HUB; BOLT, HUB, CWD/E/X, TURNSTILE, RD HEAD NC, CUSTOM	1.00	PENDING	✓	06/09/2014 07:46 AM	200	GNMTASK1
BSLOC1-2013-7	12683 - 0 - BATTERY-DRYCELL; BATTERY, ALKALINE, AA, 1.5 VOLTS, PACKAGED 8 PER	3.00	RECEIVED		05/27/2014 11:24 AM	12703	005-101
BSLOC1-2013-7	05EL01098 - 0 - MACHINE SCREW-P; CORONA PART WITH A CROSS RFF PART	1.00	ORDERED		11/19/2013 10:32 AM	12703	001-206
Showing 9 records							

The Pending Requests gadget shows a list of pending parts requests (in various statuses) for work orders listed in the Work Order gadget (regardless of whether the Work Order list gadget is added to portal layout). Displayed columns include Work Order, Part, Qty, Status (ordered, pending, partially received, etc.), Notify, Date Requested, Asset, and For Task information for each request. Other fields available, but hidden by default, include Request ID, Required Date, Requested By, Action, Action Type, Action ID, and Stock Location.



Note: The Request ID field shows the request ID as a red hyperlink. Clicking this link opens the Parts Requests screen to view the request (if you have permissions for this screen).

The **Work Order** link connects to Work Order Main page. Refer to the [Work Order Main Page](#) section for more information.

Schedule Service Summary

This gadget displays counts of Scheduled Services in various Due Status ranges.

Scheduled Service Summary							
Edit	Saved Filter	All Due Statuses	Past Due	< 30	30 - 60	60 - 90	> 90
	ALL	114,292	357	28	29	28	113,592
	t	0	0	0	0	0	0
	t3	114,292	357	28	29	28	113,592
	t4	0	0	0	0	0	0
	t5	0	0	0	0	0	0
	t6	0	0	0	0	0	0

Service Request Summary

This gadget displays lists of service requests for a location for a quick reference.

- Click **Add Filter** to add new filters for this gadget such as filters to see all service requests, service requests for a certain type of asset, or for a certain symptom.
- Click the edit pencil to edit current filters.

Service Request Summary				Add/Edit Filter
Filter	Edit	Saved Filter	SRs	
		ALL	1932	
☒		BL-EB SRs	3	
☒		SR Date Equals	3	
☒		SR Date Between	3	
☒		SR Days Older Than	1932	
☒		SR Days Younger Than	0	
☒		SR Days In The Range	0	

For more information about setting up filters, refer to the [Creating Filters](#) section.

Service Requests

Service Requests					
					Search...
Date Created ▾	ID	Asset	Priority	Task or Symptom	Status
2023-05-17 01:58 PM	GI-PH-2020-0001-2921	GI-PH-2020-0001 - 2020 GILLIG PHANTOM (0 MILES , 0 NONE)	5	SEIZING UP - BRAKE SIEZING UP	PENDING
2023-05-11 09:38 AM	GI-PH-2020-0001-2917	GI-PH-2020-0001 - 2020 GILLIG PHANTOM (0 MILES , 0 NONE)	5	000-001 - INVESTIGATE SR FAILURE	PENDING
2023-05-11 09:38 AM	GI-PH-2020-0001-2918	GI-PH-2020-0001 - 2020 GILLIG PHANTOM (0 MILES , 0 NONE)	5	004-001 - RESET CONTROLLER	PENDING
2023-05-11 09:38 AM	GI-PH-2020-0001-2919	GI-PH-2020-0001 - 2020 GILLIG PHANTOM (0 MILES , 0 NONE)	5	004-002 - TEST CONNECTIONS	PENDING
2023-05-11 09:31 AM	GI-PH-2020-0001-2910	GI-PH-2020-0001 - 2020 GILLIG PHANTOM (0 MILES , 0 NONE)	3	BRAKES - ROLLING STOCK BRAKE SYMP GROUP	PENDING
Showing 1932 records					

The Service Requests gadget shows the list of pending service requests for assets assigned to the current location in the current filter. Default displayed columns are the Asset ID, Priority, Task or Symptom, and Status. Other available columns include Zoom, ID, Assignment Status, Date Created, Created By, Reporting Source, Date Required, Linear Reference, and Jurisdiction. The Service Requests gadget is driven by filters.



Data overlap is possible when combining multiple filters. Use the Work Summary radio buttons for the specific defined filters to eliminate data overlap.

- The **Zoom**  button opens the Service Request/Defect page for the asset. Refer to the [Service Request/Defects](#) section for more information.
- The Asset column link opens the AssetViewer for the selected asset. For more information, refer to the [Asset Viewer](#) section for more information.

Create a new Service Request

Use the Asset Search gadget to create a new service request.

1. From the Asset Search gadget, enter or search for the asset for which you need to create a new service request and click GO, or select the asset from the list.
2. At the bottom of the page, click **New Service Request**.

New Work Order Location 1 - OPS ▾

New Service Request
 New PM WO
 New Repair WO

3. Complete the Service Request/Defect page with the necessary information for the asset.

Service Request - GI-PH-2020-0001-2921 (1 of 1932)



Asset ID	GI-PH-2020-0001: 2020 GILLIG PHANTOM1 BUS		
Station Location	SB - SPOKANE BUS STORAGE	Repair Location	SM - SPOKANE MAINTENANCE
Service Request ID	GI-PH-2020-0001-2921	Incident ID	0
Symptom	SEIZING UP - BREAK DOES NOT RELEASE FULLY SOMETIMES AFTER SUDDEN STOPS.		
SR Contact Name	SYSADMIN	SR Contact Phone	(111) 222 - 3333

Basic Information		Source	
lblAssetID	GI-PH-2020-0001 - 2020 GILLIG PHANTOM (0 MILES , 0 NONE)	lblCreatedBy	SYSADMIN
lblLocation	SM - SPOKANE MAINTENANCE	lblCreatedOn	2023-05-17 01:58 PM
lblJurisdiction		lblReportingSource	FTB - FROM THE BOSS
lblConditionRating	GOOD - GOOD	lblOperatorID	SYSADMIN - SYSADMIN STEVE
lblTaskID		lblName	SYSADMIN
lblPriorityID	5 - WHENEVER	lblPhoneNumber	(111) 222 - 3333
lblEstimateHours	0	lblEmailAddress	sysadmin-operator@mytransit.com

Complaint / Cause / Correction	Tasks
Faults No faults exist for this service request.	

Notes	Comments

Previous Next Manage Service Request Assign to Work Order

4. Click **Save**.

SLA – Asset Availability

The SLA - Asset Availability gadget displays current summary information regarding vehicle availability as defined in the Service Level Agreements (SLA) module. Refer to the [Availability Filter Page](#) below to learn more about creating availability filters, updating work orders service status, and using availability summary and equipment found.

SLA - Asset Availability

Filter ▼ Manage Availability

0	Spares
0	Vehicles Required
0	Vehicles Assigned
0	Vehicles Unavailable

When the count is less than 0, then the text is red as displayed in the screenshot below.

SLA - Asset Availability

Filter ▼ Manage Availability

-7 Spares

0 Vehicles Required

0 Vehicles Assigned

0 Vehicles Unavailable

To access this functionality from the Supervisor portal, use the Availability section. Administrators may configure this section to provide a link to the Availability Report. If configured by the administrator, clicking the **Availability Report** button opens the Availability Report which is based on service level agreements.

Employee Management Part Return Requests

Availability

Filter ▼ ✎

0 Spares

0 Vehicles Required

0 Vehicles Assigned

0 Vehicles Unavailable

Manage Availability

Equipment Management

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

COMPONENT

LINEAR

RAIL

STATIONARY

INVENTORY REBUILDS

Production Run Work Orders

ASSETS

INVENTORY REBUILDS

Actions

Work Orders

Work Orders						
Search...						
ID	Assignment Status	Asset	Priority	Job Type	Status	Delay Stat
SM-2018-56	Assignments	I-90E-TEST - I-90: EAST FREEWAY	1	REPAIR	OPEN	
SM-2018-58	Assignments	I-90E-TEST - I-90: EAST FREEWAY	1	REPAIR	OPEN	
SM-2018-59	Assignments	I-90E-TEST - I-90: EAST FREEWAY	1	REPAIR	OPEN	ANA
SM-2018-61	Assignments	I-90E-TEST - I-90: EAST FREEWAY	1	REPAIR	OPEN	
SM-2018-66	Assignments	I-90E-TEST - I-90: EAST FREEWAY	1	REPAIR	OPEN	
SM-2018-75	Assignments	I-90-LP-9 - 20 FOOT 4 IN SQUARE STEEL LIGHT POLE	1	REPAIR	OPEN	
SM-2018-76	Assignments	I-90-LP-3 - 20 FOOT 4 IN SQUARE STEEL LIGHT POLE	1	REPAIR	OPEN	ANA

Showing 567 records

The Work Orders gadget has a customizable table with a list of open, finished, and pending work orders at the current location. The following columns provide information for the work order:

- Title and ID
- Assignment Status: This button is yellow when an assignment is still needed
- Created By – Hidden by default. When configured to display it will render the Employee ID, name, and contact card (if available) of the employee who created the work order.
- Asset (ID)
- Priority
- Job Type
- Status, Delay Status
- Date In, Date Finished
- Approved?
- Linear Reference
- Project Completion Date
- Total Cost
- Assigned – Displays who is assigned to the work order. If more than one employee, crew, or vendor is assigned to a work order, it will display a “Multiple” hyperlink that will open a new dialog to show the full list of assignees.

It is driven by filters and is based on the Work Summary gadget. Linear information (and columns) will not display unless there is linear data in the table.

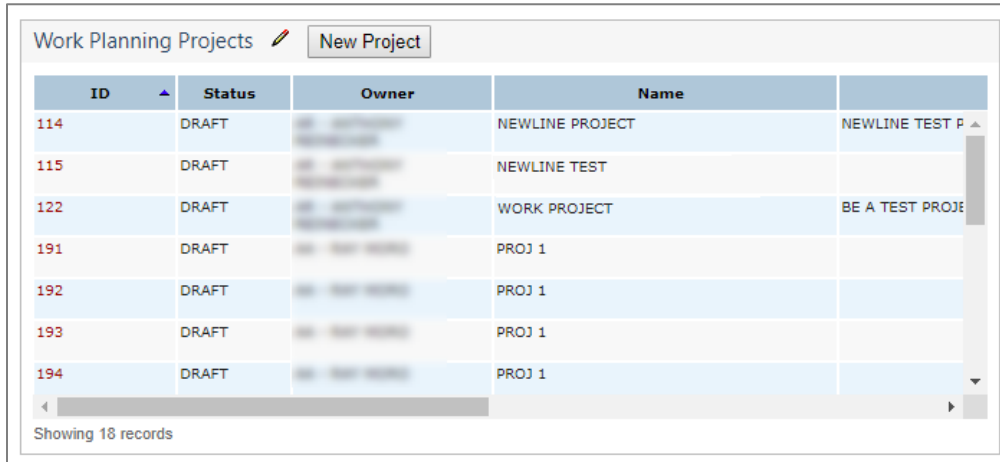


Note: Data overlap is possible when combining multiple filters. Use the Work Summary radio buttons for the specific defined filters to eliminate data overlap.

Depending on settings configuration, the **Work Order ID** link connects to the [Work Order Main Page](#) or [Work Order Details Page](#). The **Asset** link opens the [Asset Viewer](#).

Work Planning Projects

The Work Planning Projects gadget shows projects for the selected location, or projects that are assigned to the current user.



ID	Status	Owner	Name	
114	DRAFT		NEWLINE PROJECT	NEWLINE TEST P
115	DRAFT		NEWLINE TEST	
122	DRAFT		WORK PROJECT	BE A TEST PROJE
191	DRAFT		PROJ 1	
192	DRAFT		PROJ 1	
193	DRAFT		PROJ 1	
194	DRAFT		PROJ 1	

Showing 18 records

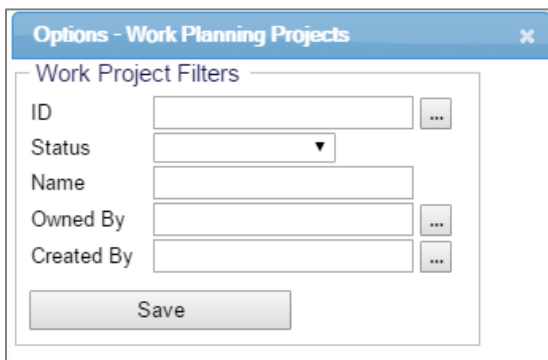
Settings

Set up the Work Planning Projects gadget to filter and display desired projects.

To set these filter options:

1. On the gadget, click the edit pencil on the gadget.

This opens the Options – Work Planning Projects pop-in.



Options - Work Planning Projects [X]

Work Project Filters

ID [xxx]

Status [v]

Name

Owned By [xxx]

Created By [xxx]

Save

2. Set each filter setting as needed:
 - **ID:** Filter on a specific ID
 - **Status:** Filter by status, such as DRAFT, APPROVED, etc.
 - **Name:** Search for a specific project by name
 - **Owned By:** Filter by the owner of the project

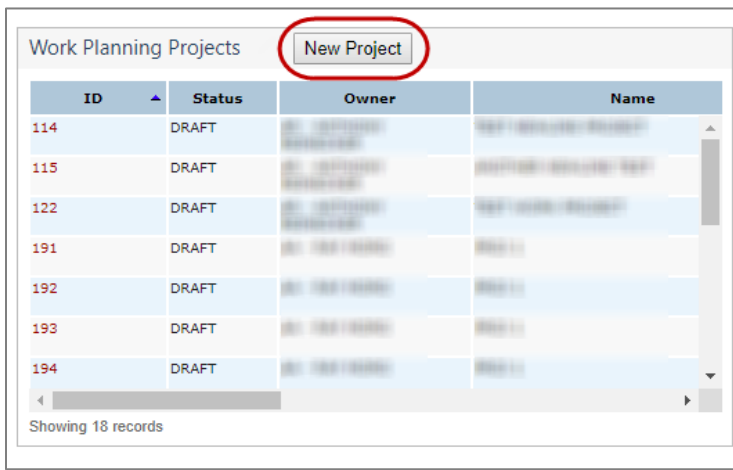
- **Created By:** Filter by the user that created the project
3. Click **Save**.

New Project Button

Use the **New Project** button to create a new project.

To create a new project:

1. Click **New Project**.



2. The New Work Project pop-in displays.

The screenshot shows a 'New Work Project' pop-in form. The form has a title bar with the text 'New Work Project' and a close button. The form is divided into sections: 'Basic Info', 'Location ID', 'Project Type', 'Project ID', 'Project Name', 'Project Goals', and 'Start Date'. The 'Location ID' field is populated with 'ACA' and has a dropdown arrow. The 'Project Type' field is empty and has a dropdown arrow. The 'Project ID' field is populated with '726'. The 'Project Name' field is empty. The 'Project Goals' field is a large text area. The 'Start Date' field is empty and has a calendar icon. At the bottom of the form are two buttons: 'Cancel' and 'Create'.

3. Enter the needed information in the fields:
 - **Location ID:** Set the location ID for the project. This field auto-populates. Change this field if necessary.

- **Project Type:** Set the type of project.
 - **Project ID:** Set the project ID. This field auto-populates.
 - **Project Name:** Name the project.
 - **Project Goals:** Enter the goals of the project.
 - **Start Date:** Enter the start date, or use the date picker to choose a start date.
4. When you are done, click **Create**.
 5. The work project is created, and the Work Project Details page displays with the newly created project.

Work Project Details

Click the red ID of a planning project to open the Work Project Details page. The Work Project details page displays detailed information about the work project.

In the Task Summary section, click the link in the Record ID to open the corresponding work order in the Work Order Main page, or the service request in the Service Request Details page.

To add a work project task:

1. From the Work Project details page, in the Work Plan section, click **Add Task**.

The Task Detail pop-in displays.

Task Detail

Basic Info

Task Name:

Record Type:

Start Date:

Due Date:

Duration Days:

Est. Cost:

Location ID: LOCATION A

Completed: ☐

Completion Date:

Completed by:

Prerequisites

Remove	Task	Sync Dates	Lead days
☐		☐	0

Dependencies

No other project tasks depend on this one.

Notes

New Note:

2. Enter all necessary information for the task.

- When **Record Type** is set as **Work order for a single asset** or **Work Order for same tasks/against multiple similar assets**, enter the work order ID (location, year, and number) or click the chooser button to use the Work Order Chooser.

Work Order Chooser:

- Click the chooser button next to the **Work order ID** field.

Work Record

Work order ID: Location: Year: No.:

The Work Order Chooser displays.

Work Order Chooser

Filter

Work Order Location:

Work Order Year:

Work Order Number:

Asset ID:

Repair Reason:

Job Status:

Job Type:

Opened Date From:

Opened Date To:

Has Task:

Account ID:

Work Order ID	Asset ID	Repair Reason	Status	Type	Date Opened	Account ID
---------------	----------	---------------	--------	------	-------------	------------

- Enter the filter information and click **Apply Filter** to display work orders.

For example, by entering a location of ACA, year of 2019, and type of PM and clicking **Apply Filter**, the following work orders display:

Work Order ID	Asset ID	Repair Reason	Status	Type	Date Opened	Account ID
ACA-2019-936	CAR-TYPEO - CAMRY	BASIC	OPEN	PM	02/06/2019 12:07 PM	1000.111101.00001.000.00000 - TO BE INSERTED
ACA-2019-937	CAR-TYPEO - CAMRY	BASIC	OPEN	PM	02/06/2019 12:10 PM	1000.111101.00001.000.00000 - TO BE INSERTED

- c. Click a work order line to select it for the task detail.
- o When **Record Type** is set as **Request for service**, enter the service request ID or click the chooser button to use the Service Request Chooser.

Service Request Chooser:

- d. Click the chooser button next to the **Service request ID** field.

The Service Request Chooser displays.

Service Request ID	Asset ID	Symptom	Comments
BL-TK-WB-17065	BL-TK-WB - BLUE LINE WEST BOUND	HT-1 - LEVEL 1 - SYMP 1	BL-WB: from 8 ft

- e. Enter the filter information and click **Apply Filter** to display service requests.
 - f. Click a service request line to select it for the task detail.
3. Once all the information is entered for the task detail, click **Save Task**. Or, at any point, click **Cancel** to cancel the new task and exit the Task Detail pop-in.

Rebuilding the schedule

Use this button to rebuild the project schedule. When you rebuild the project schedule, all tasks are moved to the start date of the project and end dates are recalculated based on duration projections. This option only displays when the project has a status of DRAFT.

To rebuild the schedule:

1. From the Work Project Details page, click **Rebuild Schedule**.

A warning displays.

2. Click **OK** to rebuild the schedule, or **Cancel** to leave the schedule as it is.

Work Order Summary

Work Order Summary Add/Edit Filter				
Filter	Edit	Saved Filter	Pending	Op
		ALL	15	39
☒		Blue Line East Bound Work	0	4
☒		WO Date Opened Equals	0	
☒		WO Date Opened Between	0	
☒		WO Date Opened Days Older Than	10	39
☒		WO Date Opened Days Young Than	0	
☒		WO Date Opened In The Range Of	0	
☒		WO Date Opened Is Empty	5	

The Work Order Summary gadget is driven by filters. Depending on configuration, it shows the summary counts of **Service Requests** and **Work Orders** in various statuses (**Planning**, **Pending**, **Open** and **Finished**) for each filter. Overlap is possible, depending on how filters are defined.

Clicking a count link button under one of the status columns opens the [Work Order Management Page](#) (Service Requests, Planning Work Orders, Pending Work Orders, and Open Work Orders) or the Review and Close Work Orders page.

Check the checkbox in the Filter column to update gadget data based on the filter selected. The information shown in the gadgets reflect the selected filter options.



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

Multiple-instance Gadgets

Ad hoc Query

Ad hoc Query  			
Search:			
Task ID	Description	Avg. Hours	Min
P	POLLUTION (EMISSION INSPECTION)	53.17	.02

The Ad hoc Query gadget provides flexibility by allowing almost any saved Ad hoc Query report (that the user has access to) to be embedded in the gadget. Search and sort functions are included, as well as the ability to launch the report in a separate window.



Refer to the *Ad Hoc Query Administrator or User Guides* for information about using the Ad Hoc Query module, or the *General Application Information* guide for more information on the Ad hoc Query gadget.

Capital Projects

This gadget displays a list of your capital projects and important information that can be viewed at a glance. Use the **Search** field to filter the list. The list updates as you type in the field.



Note: Costs from work projects are rolled into the associated capital project costs. These costs include the multi-asset work orders under work projects.

Click the edit pencil to set a filter for the list. This gadget is a multiple-instance gadget so that you can set up several gadgets as needed for viewing different filters and projects. For instance, one gadget instance can have a filter set to display projects in Draft status, and one for In Progress, or they can be grouped by project manager, etc.

Capital Projects 					
Search...					
ID	Description	Type	Status		
20121130-00002	SERVICE EXPANSION - GREEN LINE	CONSTRUCTION	APPROVALS	PEND	▲
20130103-00001	NEW PROJECT GENERATED FROM WEB	CONSTRUCTION	APPROVALS	APPR	
20130603-00006	SERVICE EXPANSION YELLOW LINE	CONSTRUCTION	REVIEWED	PEND	
20131014-00005	REPAVE SULLIVAN INTERSECTION NEAR E	INFRA	06	PEND	
20170928-00001	INSTALL HOLIDAY LIGHTS ON SPRAGUE AVENUE	CONSTRUCTION	DRAFT	PEND	
20171016-00001	REPLACE COPPER WITH FIBER OPTIC CABLE IN WEST	INFRA	DRAFT	APPR	▼
Showing 15 records					

To set a filter:

1. Click the pencil icon on the gadget you need to filter.

The Capital Project Filters pop-in displays.

Capital Project Filters

Project Type ...

Project ID ...

Status ...

Approval ...

Projects Awaiting My Approval ☐

Current Approval Employee ...

Fiscal Year

Planned date from

Planned date to

Asset ID ...

Initiator ...

Champion ...

Sponsor ...

Project Manager ...

Last Modified By User ID ...

Cancel Clear Filter Save Filter

2. Enter the information needed for the filter. Fields available for filtering include the following: Project Type, Project ID, Status, Approval, Projects Awaiting My Approval, Current Approval Employee, Fiscal Year, Planned date from, Planned date to, Asset ID, Initiator, Champion, Sponsor, Project Manager, Last Modified By User ID, Program Category ID, Program ID, Category ID, Priority ID, External Identifier.
3. Click **Save Filter** to save the filter and apply it to the list.
4. Click the edit pencil to edit the filter as necessary. While in the filter pop-in, click **Clear Filter** and **Save Filter** to clear the filters and see the whole list.

To edit or delete a gadget filter:

1. Click the pencil icon on the gadget you need to filter.

The Capital Project Filters pop-in displays.

2. Click **Clear Filter** to empty all fields, or edit fields as necessary to change the filter items.
3. Click **Save Filter** for one of the two instances:
 - Save with all fields cleared to delete the filter and display all available projects
 - Save with the edited fields to update the filter as needed

Change Requests

The **Change Request** gadget can be used to respond to requests for changes submitted via the Change Request screen.

1. Click the **ID** link to view the change request.

Change Requests 				
ID ▲	Screen ID	Screen Name	Status	Description
1	2010	Employees - Primary	PENDING	REQUESTING TO BE MOVED TO THE LATE SHIFT NEXT
2	2037	Work Order Center	PENDING	NEED TO RESCHEDULE THIS WORK ORDER, EQ-003
3	2037	Work Order Center	PENDING	PUSHING BACK DUE DATE ON WORK ORDER, WE
5	2037	Work Order Center	COMPLETED	NEED TO RESCHEDULE THIS WORK ORDER
37	2445	Purchasing Invoices	PENDING	LINK TO ENTERPRISE PURCHASING INVOICES

The Change Requests screen opens and displays the selected record.

Change Requests

ADMIN MODE CHANGE REQUEST HELP PREFERENCES

Search Reload Sort

Select Filter

Select Sort

New Copy Delete Edit Save Cancel Export

Change request ID 3

Basic Info

Proposed Changes

Changed Values

Notes 

Basic Info

Status PENDING View changes Apply changes

Description PUSHING BACK DUE DATE ON WORK ORDER

Screen ID 2037 WORK ORDER CENTER

Action type UPDATE INSERT

Type WORK ORDER CENTER

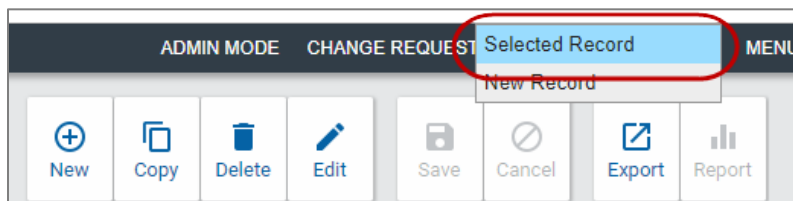
Key values [188:2:ACLOC1][188:3:2014][188:4:8][189:6:0000988]

Change requested by at 05/08/2014 18:12

Requested from screen ID 0

Requested from key values

- Click **Change Requests** and then click **Selected Record** to review and approve the change request.

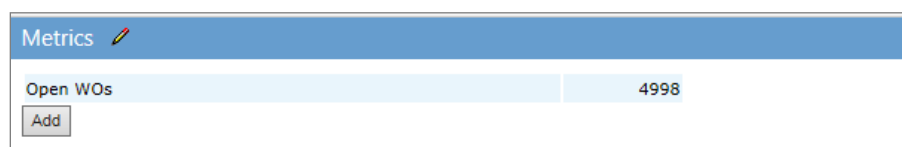


- Review and update information (if needed).
- To approve the request, on the Basic Info tab, check the **Approved** checkbox. Then click **Save**.

 A screenshot of the 'Basic Info' tab for a change request. The form contains several fields: 'Change requested by' (a dropdown menu), 'at' (a date/time field showing '05/08/2014 18:12'), 'Requested from screen ID' (a dropdown menu showing '0'), and 'Requested from key values' (a text area). Below these is the 'Approved' checkbox, which is highlighted with a red circle. Other fields include 'Change approved by' (a dropdown menu), 'at' (a date/time field), 'Notification template' (a dropdown menu with a search icon), and 'Notification status' (a dropdown menu with a search icon).


For more base information on Change Requests, refer to the *Change Requests – Reference Guide*.

Metrics

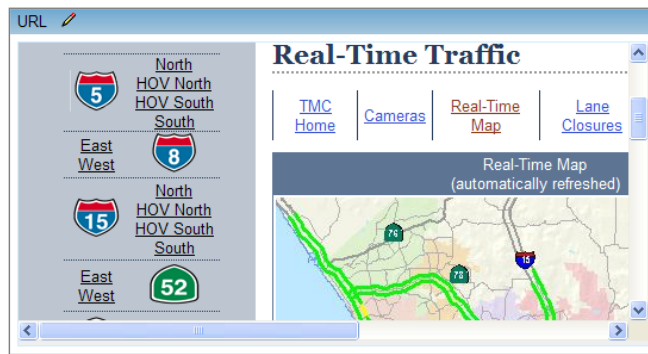


The Metrics gadget displays user-defined metrics consisting of a single data value (similar to a Dashboard gauge but with only a label and a value). This gadget uses the same data sources supported by Dashboard module gauges: saved Ad hoc Query reports (with category KPI only), and advanced key performance indicators (KPIs), including ad hoc SQL statements (requires Dashboard module administrator access).



Refer to the *General Application Information* guide for more information on this gadget.

URL



The URL gadget allows you to embed any URL (images, news feeds, webcams, maps, etc.) into an iFrame.



Refer to the *General Application Information* guide for more information on this gadget.

4. Employee Management Page

In the Work Management portal Employees gadget, click **Manage Employees** to open the Employee Management page. This page provides an overview of activity in the chosen shop by employee.

Employee Management

Current Working Location: This field only displays when you select an option other than My Employees. This uses the same functionality as described for the home page in the [Current Working Location](#) section.

View Employees

The View Employees options allow you to specify which employees display in the table. Click one of the following buttons to change update the employees below.

- **My Employees:** This button shows all employees that report directly to you.
- **Shift Employees:** This button shows all employees that are assigned to the current working location or performing work at the current working location. Employees that are not normally part of the shift but are clocked in will show in this list as they are assigned to the current working location and actively doing work on that shift. Employees that are on that shift will show in the list regardless of being clocked in or clocked out.
- **All Employees:** This button shows all employees that are assigned to the current working location or performing work at the current working location regardless of shift.

Current Shop Activity

This section lists all employees associated with the chosen location along with their work status.

Current Shop Activity								
Action	Clock In ▾	Update Selected Employees	Override Task/Clock Out Time:		*Out time defaults to current system time.			
☐	Employee ID ▾	Employee Name	Clocked In Date/Time	Time Code	Current Task	Jobbed On Date/Time	Elapsed Time On	Action
☐	AWEMP2		01/25/2018 12:03	DI				Clock Out
☐	AWEMP1		CLOCKED OUT					Clock In
☐	AWEMP-EU		CLOCKED OUT					Clock In

Override Task/Clock Out Time

Supervisors can use this field to override an employee's clock-out time or task completion time. To use the override feature, select a date and time and click **Stop Task**. Otherwise, the current system time is applied when supervisors clock out or stop a task for an employee in the list.

Action

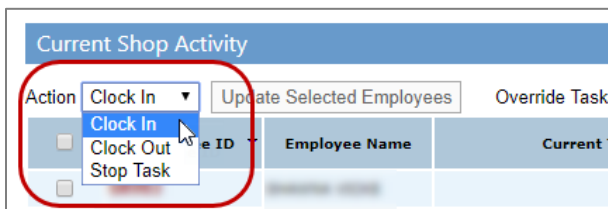
Use the Action drop-down to apply an action to an employee.



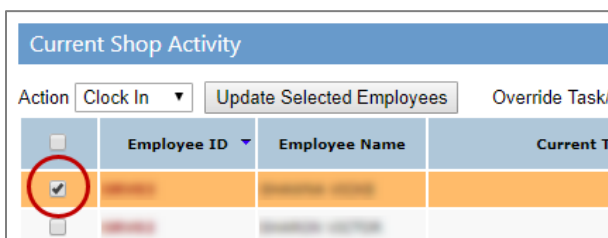
There is an option that only allows employees to job onto tasks that they have either been assigned to or if they belong to a crew that has been assigned to the task. If enabled on the Employee Classification screen, this option will prevent an employee from jobbing onto a multi-asset work order if the employee has not been assigned to the multi-asset work order but it will not prevent employees from jobbing onto INDIRECT or GENERAL tasks as these types of tasks do not have work assignments.

To action an employee line:

1. Click the Action drop-down and select an action.



2. Check the box in the left column to select the employees to action.



Selected lines display in orange. Once at least one option is selected, the Update Selected Employees button becomes active.

3. Click **Update Selected Employees**.

The action is applied to the employees.

Employee Table

Supervisors can click the link in the Employee ID column to open the Time Card page, or stop tasks and clock out employees by clicking the **Clock Out** or **Stop Task** buttons in this section. If the employee is working on a work order, click the work order ID hyperlink in the Current Task column to open the Work Order Main page for that work order.

Edit an Employee's Existing Labor

To edit an employee's labor:

1. On the Employee Management page, click the Employee ID link.

Current Shop Activity			
Action	Clock In ▾	Update Selected Employees	Override Task/Clock Out Time
☐	Employee ID ▾	Employee Name	Current Task
☐	GF		
☐	3097		
☐	3096		
☐	3095		

The Time Card page opens to the selected employee's record.

2. Select the desired date to edit from the scheduling fields. This includes changing the **Day Starts At** hour to set when the day starts, selecting either day, week, or hour views, and grouping time cards by date, employee ID, work, or time code. Click the **Refresh** button if you chose a different date than today and the defaulted 12 AM day start.

 **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.

Time Card					
☒ Employee		...			
☐ Crew		...			
☐ My Direct Employees					
Day Starts At	12 AM ▾	Date	03/04/2019 	View	Day ▾
Refresh		Group By Date ▾			
Showing Labor for Employee: S					
WO/SR/Indirect	Date	Task	WAC	Time Code	
Monday, March 4, 2019					
 INDIRECT @ 1	03/04/2019 01:37 PM	IND-FR - FIELD REPAIR		REG - REGULAR	

3. Click the + button to reveal more information about the work performed.

Showing Labor for Employee: 3065

WO/SR/Indirect	Date	Task	WAC	Time Code	Classification	Hours
Thursday, June 6, 2019						
INDIRECT	06/06/2019 02:24 PM	IND-15 - YARD CHECK		15 - YARD CHECK		
Posted By	Start	End	Time Code	Classification	Task ID	
[Still Working...]	10/20/2006 04:02 AM	06/06/2019 02:24 PM	15		IND-15	



Note: The moving wrench icon indicates the employee is currently working on the task.

Classification	Hours
	110698.37
	110698.37
	Edit

- Click the **Edit** button to the right to edit labor information. The **Edit** button is grayed out if you cannot edit the item.

Showing Labor for Employee: 02/01/2017 12:00 AM - 03/01/2017 12:00 AM

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

The *Edit Labor pop-in* displays with the *Edit Labor Posting* section containing the editable fields and the *Labor History* showing at the bottom of the pop-in.



Note: Service Request information displays at the top of the pop-in if the labor had been associated with a service request.

Edit Labor

Edit Labor Posting

Task ID: AF [Lookup](#) PM SERVICE A

WAC: 02 [...](#) ADJUSTED

Start: 02/28/2017 07:00 AM [...](#) End: 02/28/2017 02:00 PM [...](#)

Hours: 7.00

Time Code: REG [...](#) REGULAR

Classification: [...](#)

Account ID: 000-0001-00 [...](#) ACCOUNT

Comments:

[Cancel](#) [Save](#) [Full Reversal](#)

Labor History

Posted By	Start	End	Date	Time Code	Service Request ID	Task ID	WAC	Hours
	02/28/2017 07:00 AM	02/28/2017 02:00 PM	02/28/2017	REG		AF - PM SERVICE A 02		7.00



Note: If the portal settings are: POST or BOTH with start/end datetimes, the Edit Labor pop-in allows you to edit the start/end datetimes, and calculates hours accordingly as shown in the screenshot below.

- Update the fields as desired and click **Save**.

Edit Labor

Edit Labor Posting

Task ID: AF ... Lookup PM SERVICE A

WAC: 02 ... ADJUSTED

Start: 02/28/2017 07:00 AM

Hours: 7.00

Time Code: REG ... REGULAR

Classification: ...

Account ID: 000-0001-00 ... ACCOUNT

Comments:

Cancel Save

The details are updated on the Time Card page.

Reverse Labor

To completely reverse the labor hours:

- On the Time Card page, click **Edit**.

Showing Labor for Employee: 02/01/2017 12:00 AM - 03/01/2017 12:00 AM

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

The Edit Labor pop-in displays.

Edit Labor

Edit Labor Posting

Task ID: AF ... Lookup PM SERVICE A

WAC: 02 ... ADJUSTED

Start: 02/28/2017 07:00 AM

Hours: 7.00

Time Code: REG ... REGULAR

Classification: ...

Account ID: 000-0001-00 ... ACCOUNT

Comments:

Cancel Save Full Reversal

Labor History

Posted By	Start	End	Date	Time Code	Service Request ID	Task ID	WAC	Hours
	02/28/2017 07:00 AM	02/28/2017 02:00 PM	02/28/2017	REG		AF - PM SERVICE A	02	7.00



The sample pop-in shows the service request information that was added during the previous labor edit.

2. Click **Full Reversal** to reverse all the hours.

Edit Labor

Edit Labor Posting

Task ID: AF ... PM SERVICE A

WAC: 02 ... ☒ No Parts Needed

Start: 02/28/2017 07:00 AM End: 02/28/2017 02:00 PM

Hours: 7.00

Time Code: REG ...

Classification:

Account ID: 000-0001-00 ...

Comments:

Labor History

Posted By	Start	End	Date	Time Code	Service Request ID	Task ID	WAC	Hours
	02/28/2017 07:00 AM	02/28/2017 02:00 PM	02/28/2017	REG		AF - PM SERVICE A	02	7.00

The Employee Timesheet page shows zero hours.

Showing Labor for Employee: 02/01/2017 12:00 AM - 03/01/2017 12:00 AM

WO/SR/Indirect	Date	Task	WAC	Time Code	Classification	Hours
Tuesday, February 28, 2017						0.07
☒ Work Order: 1-2017-23 Equipment: CAR01 Service Request:	02/28/2017 07:00 AM 02/28/2017 02:00 PM	AF - PM SERVICE A	02 - ADJUSTED	REG - REGULAR		0.00
☒ Work Order: 1-2017-23 Equipment: CAR01 Service Request:	02/28/2017 02:35 PM 02/28/2017 02:39 PM	AF - PM SERVICE A	02 - ADJUSTED	REG - REGULAR		0.07 Edit
Total Hours:						0.07

3. Click the + button to see the entire transaction.

Tuesday, February 28, 2017								0.07
Work Order: 1-2017-23 Equipment: CAR01 Service Request: 02/28/2017 07:00 AM 02/28/2017 02:00 PM AF - PM SERVICE A 02 - ADJUSTED REG - REGULAR <td>0.00</td>	0.00							
Posted By	Start	End	Time Code	Classification	Service Request ID	Task ID	WAC	Hours
	02/28/2017 07:00 AM	02/28/2017 02:00 PM	REG			AF	02	-7.00
	02/28/2017 07:00 AM	02/28/2017 02:00 PM	REG			AF	02	7.00

Post Indirect Time

 If your organization prefers that this capability only be used by supervisors, an administrator must edit the Location Settings, Labor Tracking Settings section, **Use Legacy Indirect Labor Entry Method** setting. Check this box to restrict input of timecode to supervisors only. To manage this for real-time workflows, use the control rights screens for users rather than this setting.

To post indirect time:

1. In the Employee Management page, click **Indirect Time**.

Employee Management

View Employees: [My Employees](#) [Shift Employees](#) [All Employees](#)

Current Shop Activity

Action: Clock In Update Selected Employees Override Task/Clock Out Time: *Out time defaults to current system time.

	Employee ID	Employee Name	Current Task	Jobbed On Date/Time	Elapsed Time On	Action	Clocked In Date/Time	Time Code
☐	1000000000	JOHN DOE				Clock Out	06/26/2017 01:26 PM	REG
☐	1000000000	JOHN DOE				Clock Out	02/28/2017 02:43 PM	REG

[Back](#)
[Today's Time Card Report](#)
[Employee Hours Change](#)
[Review Labor Entries](#)
[Review Timesheets](#)
[Indirect Time](#)

The Choose an indirect task ID page displays.

Choose an indirect task ID

Location: 1 - OPS

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-05) MEAL	(IND-MT) MEETINGS	(IND-ML) ML TECH/TOWING
(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](#)

2. Select the **Location** from the drop-down if a different one is required.
3. Enter a **Comment** and **Time Code** if needed. Both of these are optional.
4. Click one of the task buttons to select the task for posting indirect labor.

Choose an indirect task ID

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-05) MEAL	(IND-MT) MEETINGS	(IND-ML) ML TECHITOWING
(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

The Post Indirect Labor pop-in displays.

Post Indirect Labor

Employees

Location

Indirect Task ID

Time Code REGULAR

Classification

Date

Hours

Account ID

Comment

Cancel Save

- Complete the fields and click **Save** to post the indirect labor.

 **Note:** 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 after selecting the start and end times.

The indirect time shows on the Employee's Timesheet.

To edit indirect time:

- Open the time sheet with the indirect time entry that needs to be edited.
- Click **Edit**, and follow the steps as outlined above to edit the posting.

View Today's Time Card Report Button

Click this button to generate the Current Employee Labor Audit report. This report is only generated if the supervisor has access to reports and has been granted access rights to the report.

Employee Hours Change Button

Click this button to open the Resource Hours Change page where supervisors may enter information regarding employee absence (either from the past, or planned for the future).

The screenshot shows the 'Resource Hours Change' form. It includes a 'Resource Type' section with radio buttons for 'Employee ID' (selected) and 'Location ID', followed by a dropdown menu showing '1 - OPS'. The 'Recurrence' section has radio buttons for 'One-time' (selected), 'Daily', 'Weekly', and 'Monthly'. Below these are fields for 'Description', 'From' (date), 'To' (date), 'Task ID', and 'Time Code', each with a dropdown arrow. At the bottom are 'Back' and 'Save' buttons.

Complete the fields as desired and click **Save** to save your entries.

Review Labor Entries Button

Click **Review Labor Entries** to open the Time Card page. For more information on the Review Timesheets button, refer to the [Review Timesheets](#) section.

The screenshot shows the 'Time Card' form. It has a header bar with 'Time Card'. Below it are radio buttons for 'Employee' (selected), 'Crew', and 'My Direct Employees', each with a dropdown arrow. To the right are 'Accrual Time Type' and 'Current Balance' buttons. Below the radio buttons are 'Day Starts At' (12 AM), 'Date' (06/07/2019), 'View' (Day), and 'Group By' fields. There is also a 'Date' dropdown and a 'Refresh' button. At the bottom are 'Back' and 'Review Timesheets' buttons.

To review labor entries:

1. Click **Review Labor Entries** to review a timesheet for an employee, a crew, or direct employees.

2. Click the **Employee**, **Crew**, or **My Direct Employees** chooser buttons to search for the correct ID.
3. Click **Refresh** to update the list once you have chosen an ID or group to filter.
4. The results for the search will display only employees at the locations available to the current logged-in user.

Review Timesheets

Review timesheets from the Timesheet List Filter page. View and edit direct employees' timesheets, or view your own timesheets.

To review and edit timesheets:

1. From the Employee Management page, click **Review Timesheets**.

The screenshot shows the 'Employee Management' page. At the top, there are buttons for 'View Employees: My Employees', 'Shift Employees', and 'All Employees'. Below this is the 'Current Shop Activity' section, which includes a table with columns: Employee ID, Employee Name, Current Task, Jobbed On Date/Time, Elapsed Time On, Action, Clock In Date/Time, and Time Code. The table shows two entries with 'Clock Out' actions. At the bottom of the page, there is a navigation bar with buttons: 'Back', 'Today's Time Card Report', 'Employee Hours Change', 'Review Labor Entries', 'Review Timesheets' (highlighted with a red circle), and 'Indirect Time'.

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

The screenshot shows the 'Timesheet List Filter' page. It has a filter section with fields for 'Employee' (with a dropdown), 'Status' (set to 'OPEN'), 'Start Date', and 'End Date'. There is an 'Apply Filter' button. Below the filter section is a table titled 'Timesheets' with the following data:

Timesheet ID	Employee	Start Date	End Date	Total Hours	Supervisor Approval	Employee Approval	Shift List
211	SRV03 - SHAWN VICKS	06/02/2019	06/08/2019	8.00		✓	

At the bottom of the page, there are buttons for 'Back' and 'Review and Approve'.

2. Type or use the **Employee** chooser button to enter an employee if a different employee is needed. The results for the employee search will display only employees at the locations available to the current logged-in user.

3. Click **Apply Filter**.
4. Click the red Timesheet ID hyperlink to open a specific timesheet to review, or click **Review and Approve** to go through the list of timesheets one at a time.

The timesheet displays. Non-working and holiday days are displayed as 0 hours.

Timesheet Filter

Employee: [Redacted]

Date: 06/02/2019

Timesheet

Timesheet ID: 211 Employee: [Redacted]

Start Date: 06/02/2019 End Date: 06/08/2019

☒ Employee Approval Approved by User ID: [Redacted] Date and Time Approved: 06/07/2019 11:11 AM

☐ Supervisor Approval Approved by User ID: [Redacted] Date and Time Approved: [Redacted]

Status: OPEN

Time Code ID	Classification	Location	Total Hours	Sun 2 Jun	Mon 3 Jun	Tue 4 Jun	Wed 5 Jun	Thu 6 Jun	Fri 7 Jun	Sat 8 Jun
GRAND TOTAL			8.00	0.00	0.00	2.00	6.00	0.00	0.00	
REG - REGULAR		1	2.00	0.00	0.00	2.00	0.00	0.00	0.00	
REG - REGULAR			6.00	0.00	0.00	0.00	6.00	0.00	0.00	
SE-NWD - NON-WORKING DAY			0.00	0.00	0.00	0.00	0.00	0.00	0.00	

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

5. 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.

6. To add a new note to the timesheet:

- i. Click **New Note**.

Timesheet

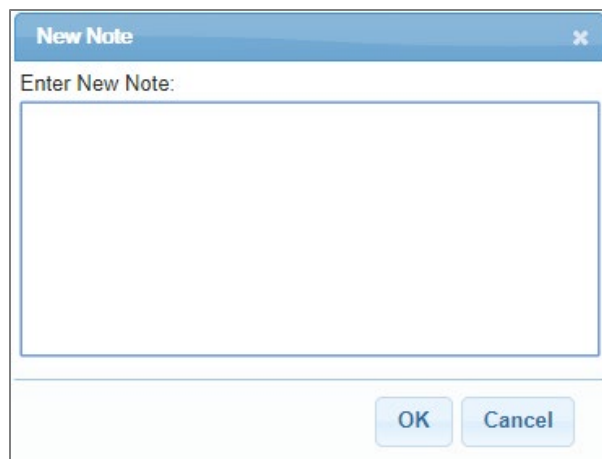
Timesheet ID: 211 Employee: [Redacted]

Start Date: 06/02/2019 End Date: 06/08/2019

☒ Employee Approval Approved by User ID: [Redacted] Date and Time Approved: 06/07/2019 11:11 AM

☐ Supervisor Approval Approved by User ID: [Redacted] Date and Time Approved: [Redacted]

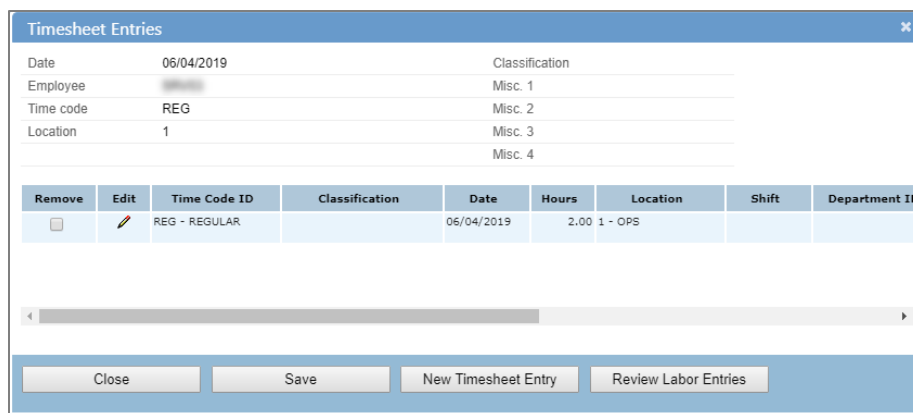
- ii. The New Note pop-in displays.



A dialog box titled "New Note" with a close button (X) in the top right corner. Below the title bar, it says "Enter New Note:" followed by a large empty text area. At the bottom right, there are two buttons: "OK" and "Cancel".

- iii. Enter your note and click **OK**, or click **Cancel** to cancel and discard any entered text.
7. If needed, edit the time in one of the following ways:
 - o **Edit a cell:**
 - a. Click a time entry in cell.

The Timesheet Entries pop-in displays.



A pop-in window titled "Timesheet Entries" with a close button (X) in the top right corner. It contains a form with the following fields:

Date	06/04/2019	Classification	
Employee	[Redacted]	Misc. 1	
Time code	REG	Misc. 2	
Location	1	Misc. 3	
		Misc. 4	

Below the form is a table with the following columns: Remove, Edit, Time Code ID, Classification, Date, Hours, Location, Shift, and Department ID.

Remove	Edit	Time Code ID	Classification	Date	Hours	Location	Shift	Department ID
☐		REG - REGULAR		06/04/2019	2.00	1 - OPS		

At the bottom of the pop-in, there are four buttons: "Close", "Save", "New Timesheet Entry", and "Review Labor Entries".

- b. Edit or remove an entry, or click **New Timesheet Entry** to add another entry.
 -  Note: The Edit column only displays if the logged-in user has access to edit this timesheet.
- c. Click **Review Labor Entries** to open the Timesheet page (which filters to the week view for that time card).
 -  Note: Clicking back from the Timesheets page returns to the Timesheet Filter page without the Timecard Entries pop-in open.

- d. Click **Save**.
- o **Add a new time entry:**
 - a. In the Timesheet Entries pop-in, click **New Timesheet Entry** to add a new entry to the timesheet.

The Timecard pop-in displays.

- b. Use the date picker to enter a **Date**. This is required.
- c. Enter the hours to add to the entry.
- d. Use the chooser buttons to enter **Time code** (required), **Location ID**, **Department ID**, and **Account ID** as needed.
- e. Add a comment to the entry if needed.
- f. 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.

- g. After all entries are added, click **Close**.
8. Perform one of the following actions:

- To approve the timesheet, click **Approve**. When you save 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 if you are reviewing a list of timesheets. If you are not reviewing a list of timesheets or have reviewed the last one, you are returned to the Timesheet List Filter page.

- To reject the timesheet before a timesheet has been approved by a supervisor, 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.
- Once a timesheet is approved, you can reject the timesheet by clicking **Reject** on this page. This sends the timesheet back to the employee for changes.

The next timesheet opens if you are reviewing a list of timesheets, or 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.

5. Work Orders

New Work Orders

The initial New Work Order page is accessible from several different places, including the **New Work Order** button on the Shop Calendar and Work Order Management pages and the **New PM WO** and **New Repair WO** buttons on the Equipment Management page, etc.



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

New Work Order

Title

Job Type Repair PM Part Rebuild

Location

Equipment ID  

Depending on which tab you select for **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.

New Work Order Variances

The new work order pages vary slightly depending on whether the asset is linear or not, and fields will vary depending on whether the new work order is a repair, PM, or part rebuild. Below are some example pages.

Equipment

New Work Order 1-2019-47
Enterprise Portal Equipment Screen

Title

Job Type

Location

Equipment ID

REPAIR

1 - OPS

CAR01 EQTYPE

2006 JEEP GRAND CHEROKEE, METERS: 1-20100 MILES; 2-200 HOURS

Work Details

Messages

OTHER OPEN WORK ORDERS

WORK ORDER NUMBER	TYPE	STATUS	SCHEDULED	REASON	SERVICE
1-2017-23	PM	OPEN	05/23/2017 02:00	C	FMSRV-001
1-2017-41	REPAIR	OPEN		J	
1-2017-38	REPAIR	OPEN	04/04/2017 00:00	J	
ACA-2018-519	REPAIR	OPEN		1112	
ACA-2018-552	REPAIR	OPEN		A	
1-2019-46	REPAIR	OPEN		A	
ACA-2018-536	REPAIR	OPEN		J	

UNIT IS 24 DAYS LATE FOR PM SERVICE FMSRV-001

DUE DATE 09/21/2017

Meter1

Meter2

Repair reason ID

Work Class

Service Status

Date and Time In

Date and Time Due

Meter1 Validation

Meter2 Validation

REASON 1 - BASIC

06/07/2019 12:51 PM

06/07/2019 08:51 PM

Back

Cancel

Save

Sample New REPAIR Work Order Page for Equipment

Linear Assets

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 section. This can be accomplished by entering the **From Marker**, **To Marker**, and **Offset** positions 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 your organization has mapping licensed, and mapping is 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

INT-017451

...

N ARGONNE & E MISSION

Offset

212.0

To Marker

INT-017001

...

N McDONALD & E MISSION

Offset

435.0

Asset Length

4.58 mi

Selected Length

2.56 mi

Attributes

Choose...

No attributes selected

Effective Date

07/28/2016

From INT-017451 +212 (2,853 feet)

To INT-017001 +435 (18,351 feet)

Layers

Base maps

Find addresses and features

☒ Asset

☒ Asset

☒ Reference markers

☐ Reference marker labels

☒ From and to points

☐ Attributes

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. 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.

New Repair Work Orders

Equipment

When you enter an **Equipment ID** and click the **Continue** button on the initial New Work Order page as discussed above, you will see one of the following pages as indicated in the screenshot below.



Note: The meter validation drop-down list is limited based on the permissions setting on the User Groups, Special Rights tab and may include the following: **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 checkboxes 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.



Note: By entering **Estimated Appointment Hours** (depends on settings), a **Technician** will create an appointment for the duration based on the **Date and Time In**. If you do not enter a technician, the appointment will show as unassigned.



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

More information on new repair work orders:

- 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.
- For **Equipment New Work Orders**, complete the fields.
- If applicable, select any pending service requests to include on the work order. The service requests are listed by priority rank.
- 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.



Note: If your organization has Enterprise Portal, a link to the Enterprise Portal screen for the asset displays on the top of the page.

To open a new repair work order:

1. Click the **Repair** tab for **Job Type**, enter a **Title**, select the **Location**, and enter an **Equipment ID**.

2. Click **Continue** to display the New Repair Work Order page with the selected job type, location, and equipment or linear ID as shown in the following sections.

✓ **Tip:** If you selected the incorrect **Job Type**, click the **Back** button to go back to the initial New Work Order page.

3. On the New Work Order page, once all information is entered, click **Save** to create a new work order.

Depending on your configuration, either the Work Order History page, the Work Order Main page, or the Work Order Details page displays.

- To see all work orders associated with the equipment unit, click the **Show All** button on the Work Order History page.

4. Click **Continue** to go to the Work Order Main page or the Work Order Details page.



Your screen may appear slightly different based on settings.



By entering **Estimated Appointment Hours** (depends on settings), a **Technician** will create an appointment for the duration based on the **Date and Time Assigned**. If you do not enter a technician, the appointment will show as unassigned.



The Priority Code choice-list is based off of asset category (if one exists).

Linear Assets

To open a new repair work order:

1. Click the **Repair** tab for **Job Type**, enter a **Title**, select the **Location**, and enter a **Linear Asset ID**.

2. Click **Continue** to display the New Repair Work Order page with the selected job type, location, and equipment or linear ID as shown in the following sections.

 **Tip:** If you selected the incorrect **Job Type**, click the **Back** button to go back to the initial New Work Order page.

3. On the New Work Order page, 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.

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

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

5. Complete the fields.
6. Click the **Save** button to create a new work order.

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

*Depending on your configuration, either the Work Order History page, the Work Order Main page, or the Work Order Details page displays. To see all work orders associated with the asset, click the **Show All** button on the Work Order History page.*

7. Clicking the **Continue** button takes you to the Work Order Main or the Work Order Details page.

New PM Work Orders

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



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.
 - 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.

To start a new PM work order:

1. Click the **PM** tab for **Job Type**, enter a **Title**, select the **Location**, and enter an **Equipment ID** or **Linear Asset ID**.

2. Click **Continue**.

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

 **Tip:** If you selected the incorrect **Job Type**, click **Back** to go back to the initial New Work Order page.

3. Once all information for the PM work order is entered, click **Save**.

New Part Rebuild Work Orders

Inventory rebuilds are work orders for work performed on rebuildable parts in inventory, for instance, a wheel, an alternator, etc. A rebuildable part is determined by the part suffix on the Parts Data Tracking screen. Inventory rebuilds only have the status of open or work finished. Inventory rebuilds may be regular work orders or production run work orders. Refer to [Extra Information about Production Run Work Orders](#) and the *Shop Activity Production Manager User Guide* for more information about this portal.

To create a new work order for part rebuilds:

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

- For Part Rebuilds to work correctly, several criteria must met:
 - Part Status tracking must be turned on. The system will build these on demand.
 - The part classification assigned to the part must have one of the repairable/rebuildable flags checked
 - 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.

5. Complete the fields and click **Save** to create a new 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.



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

6. Click **Cancel** to cancel the creation of the new work order.
7. Click **Back** to go back to the page from which you originated.

6. Multi-asset Work Orders

Multi-asset Work Orders (MAWO) functionality is integrated into your existing Work Management and Supervisor portals. It enables you to create a parent work order to collect a group of related child work orders. This functionality is perfect for cases where common actions – such as cleaning services or visual inspections – are performed on multiple assets at the same time, possibly by a crew of employees. You do not have to create separate work orders and go into the individual asset work orders to track information.

Click the **Multi-asset WO** button to access the Multi-asset Work Orders workflow.

The first screenshot shows the 'Equipment Management' section with a search bar and a 'Go' button. Below the search bar, there are buttons for 'View Calendar', 'Multi-asset WO' (highlighted with a red circle), 'Work Order Management', 'Review and Close', and 'Service/Inspection Due'.

The second screenshot shows the 'Work Management Portal' section with a 'Current Working Location' dropdown set to '1 - OPS'. Below this, there are buttons for 'View Calendar', 'Multi-asset WO' (highlighted with a red circle), 'Crew Management', and 'Service/Inspection Due'.

The Multi-asset Work Orders Management page displays.

The screenshot shows the 'Multi-asset Work Orders Management' page. At the top, there is a 'Current Working Location' dropdown set to '1 - OPS'. Below this, there is a 'Current Location' dropdown set to 'ACA - ASSET CENTRAL ADMINISTRATION' and a 'Status' dropdown set to 'OPEN'. The main section is titled 'Multi-asset Work Orders: 15' and includes 'Expand All' and 'Collapse All' buttons. Below this is a table with columns: Parent Work Order, Title, Assets, View / Edit Assignments, # Assets, and # Finished. The table lists several work orders, including 'ACA-2018-510', 'ACA-2018-515', 'ACA-2018-530', 'ACA-2018-546', 'ACA-2018-611', 'ACA-2018-669', 'ACA-2018-802', 'ACA-2018-854', and 'ACA-2018-860'. Each row shows the parent work order, title, assets, and the number of assets and finished work orders. Below the table, there is a 'Current Filter' dropdown and a 'No filter defined' message. At the bottom, there are buttons for 'Define Filter', 'Clear Filter', 'Back', and 'New Multi-asset WO'.

Parent Work Order	Title	Assets	View / Edit Assignments	# Assets	# Finished
ACA-2018-510	Symbol Test	SYMBOLTEST	Assignments	1	0
ACA-2018-515	Vehicle Inspection	VEHICLE-1, KACAR01, KGV1	Assignments	3	0
ACA-2018-530	STANDARD JOB MAWO	RD-000234, VEHICLE-1, KACAR01	Assignments	3	0
ACA-2018-546	Vehicle Inspection	MC-VEHICLE-1, KPEQP-001, KGV1, KACAR01	Assignments	5	0
ACA-2018-611	Vehicle Inspection	VEHICLE-1, KACAR01, KGV1	Assignments	1	0
ACA-2018-669	VEHICLE INSPECTION	VEHICLE-1, KACAR01, KGV1	Assignments	3	0
ACA-2018-802	VEHICLE INSPECTION	VEHICLE-1, KGV1, KACAR01	Assignments	3	0
ACA-2018-854	REPAIR FROM ACCIDENT	ROAD06, ROAD05, ROAD02, ROAD01	Assignments	4	0
ACA-2018-860	Vehicle Inspection	RD-000012, RD-000001, MC-LIN-06, MC-LIN-05, RD-003507, RD-002939, RD-002575, RD-002131...	Assignments	13	0

The Multi-asset Work Orders Management page is similar to the Work Order Management page, except that it has different columns, titles, and names. The page enables you to list multiple asset IDs for a particular parent work order. The Multi-asset Work Orders section includes the following information: parent work order, assets, # assets, # finished, # closed,

status, date/time opened, date/time finished, date/time closed, account, priority, repair reason, work class, and warranty.

High-level (parent) work orders are listed, and when multiple assets are assigned, expanding the view (+) enables you to see lower-level (child) work order information, including asset ID, description, asset service status, child work order number (click the link to see the child work order), and work order service status.

Multi-asset Work Orders: 15 Expand All Collapse All					
Parent Work Order	Title	Assets	View / Edit Assignments	# Assets	# f
ACA-2018-530	STANDARD JOB MAWO	RD-000234, VEHICLE-1, SYMBOLTEST	+ Assignments	3	0
ACA-2018-546		MC-VEHICLE-1, KPEQR-001, KGV1, KACAR01	- Assignments	5	0
	Asset ID	Description	Asset Service Status		Child Wo
	MC-VEHICLE-1	MC-EQTP-1			ACA-2018-547
	KACAR01	NF-G40-01-1000			ACA-2018-550
					ACA-2018-552
ACA-2018-611		SYMBOLTEST-EQTYPE	+ Assignments	1	0
ACA-2018-669	VEHICLE INSPECTION	VEHICLE-1, KACAR01, KGV1	+ Assignments	3	0
ACA-2018-802	VEHICLE INSPECTION	VEHICLE-1, KGV1, KACAR01	+ Assignments	3	0
ACA-2018-R54	REPAIR FROM ACCIDENT		+ Assignments	4	n



Note: When opening a child work order of a multi-asset work order, the associated multi-asset work order ID displays on the Work Order Main page as shown below. The new work order also opens as the same job type as the parent work order (repair or PM).

Work Order Main			
Asset ID	MC-VEHICLE-1: MC-EQTP-1 🔗		
Repair Location	ACA - ASSET CENTRAL ADMINISTRATION		
Work Order ID	ACA-2018-547 🔗	Job Status	OPEN
Job Type	REPAIR	Projected Completion Date	06/12/2019 02:47 PM
Parent Multi-asset WO ID	ACA-2018-546 🔗	Priority	1 - EMERGENCY/IMMEDIATE

To view or edit a parent work order:



Once a parent work order has been created, click the red link in the Parent Work Order column on the main Multi-asset Work Order page. This opens the Parent Work Order page. Use this page to view the parent work order and post labor, parts, and commercial information to all the child work orders simultaneously.

Multi-asset Work Orders: 6			
Parent Work Order	Assets	View / Edit Assignments	A
ACLOC1-2017-562		Assignments	0
ACLOC1-2015-86	AC-EQ-001, AC-EQ-002, AW-EQ-001, AW-EQ-003, AW-EQ-003-1, AW-EQ-003-2, AW-EQ-004, AW-EQ-005...	Assignments	85
ACLOC1-2015-71		Assignments	0
ACLOC1-2015-65	AC-EQ-002	Assignments	1
ACLOC1-2015-60	AC-EQ-001, AC-EQ-002	Assignments	2
ACLOC1-2015-6	AC-EQ-001, AC-EQ-002, AW-EQ-001, AW-EQ-002, AW-EQ-003, AW-EQ-003-1, AW-EQ-005, KGCAR51...	Assignments	14



The system supports real-time labor capture across Multi-asset Work Orders.



Note: The Parent Work Order page displays parent and child work order information. Depending on settings, it also includes an area to add Notes or Comments.

Creating a new Multi-asset Work Order

To create a new Multi-asset Work Order:

- From the Multi-asset Work Order Management page, click **New Multi-asset WO**.

ACA-2018-530	STANDARD JOB MAWO	RD-000234, VEHICLE-1, SYMBOLTEST	Assignments
ACA-2018-546		MC-VEHICLE-1, KPEQP-001, KGV1, KACAR01,	Assignments

Current Filter:

No filter defined

Define Filter
 Clear Filter

Back
 New Multi-asset WO

The Parent Work Order page displays.

Parent Work Order ID: ACA-2019-1010

Job Type: REPAIR ▾ Date Opened: 06/12/2019 02:56 PM

Status: OPEN ▾ Date Finished:

Warranty: UNKNOWN ▾ Date Closed:

Account:

Priority:

Work Class:

PM Service:

Standard Job:

Repair Reason:

Repair Site: 01 FACILITY

PM Scheduled:

Title:

Notes

Assets Tasks Associate Existing WOs

Add Assets ☐ Open All PLANNING/PENDING Work Orders

Remove	PM	Asset ID	Asset Description	Meter 1	Meter 1 Validation	Life Meter 1 Usage

Back Save Multi-asset WO

2. Select the **Assets** tab and add assets to the parent work order. When assets are added, Work Order IDs are generated for the individual child work orders. The child work orders are created (Child Work Order column) after you click the **Save Multi-asset WO** button to save the parent work order.

Assets Tasks Associate Existing WOs

Add Assets ☐ Open All PLANNING/PENDING Work Orders

Remove	PM	Asset ID	Meter 1	Meter 1 Validation	Life Meter 1 Usage	Meter 2	Meter 2 Validation	Life Meter 2 Usage	Child Work Order
		AC-EQ-001		NO EQ UPD ▾	100		NO EQ UPD ▾	0	ACLOC1-2017-565

Showing 2 records

Back Save Multi-asset WO Assignments

3. Enter the following information for the parent work order, which will be carried through to the generated child work orders:
 - i. In the parent work order area, complete the following fields: **Warranty**, **Account**, **Priority**, **Repair Reason**, **Repair Site**, **Work Class**, and **PM Service**.
 - Note: **Status**, **Date Opened**, **Date Finished**, and **Date Closed** are specific to the parent work order, and are not needed at this time.
 - ii. Add a note if necessary. If the Notes area is not showing, click the more info button (blue arrow) to expand the note section, and click **New Note** to enter a note. Be sure to click **Save Note** when your note is complete.

- iii. Click **Save Multi-asset WO** to create this work order.

The Tasks tab is available after saving the work order.

- iv. On the **Tasks** tab, select a task, WAC, and add comments if necessary for the parent work order. Tasks on the parent work order are carried through to the new (child) work orders generated by the parent.

Delete	Task ID	WAC	Comments
Clear	001 Lookup	"1 ...	
Clear	JSR Lookup	05 ...	
	Lookup		

- Be sure to include all the correct attributes on the parent work order. Once the initial parent and child work orders are created, subsequent changes to the parent work order (header information) only affect the parent. Subsequent changes to the parent are carried through to a new *child* only if a new asset is added to the parent. Existing child work orders remain unchanged.

Assets Tab

On the **Assets** tab, you can add asset IDs and their respective information.

1. Click **Add Assets** to add additional assets to the multi-asset work order.

Remove	PM	Asset ID	Asset
☐			

- The Add Assets pop-in displays and allows you to choose assets, create a consist, or create or choose an existing linear asset.

- Depending on your data entry preference, save after entering data on each tab, or save after entering data on all the tabs. You can finish or close the parent work order independent of the child work orders. You can also finish the child work orders separately, as depicted in the following screenshot.

Asset Tab General Information

- As assets are added and saved, the system generates child work orders that link to the parent work order.
- Information is tracked at the asset level. The following information can be recorded for each asset: Meter information, child work order ID, service status, WO status, finished, closed, downtime, and warranty information.
- If you enter an asset and change your mind before saving, click **Clear** to remove the asset. Once the MAWO is saved, the child work order is generated and the only option is to check the **Remove** checkbox in the same column which removes the child work order from the parent work order.

Remove	PM	Asset ID	Asset Description
Clear		14826	2008 FORD F250 5.4L V8 CREWCAB P/U AUTOMATIC 5 SPD
Clear		14825	2008 FORD F250 5.4L V8 CREWCAB P/U AUTOMATIC 5 SPD
Clear		14824	2008 FORD F250 5.4L V8 CREWCAB P/U AUTOMATIC 5 SPD
Clear		14823	2008 FORD F250 5.4L V8 CREWCAB P/U AUTOMATIC 5 SPD
Clear		14821	2008 FORD F250 5.4L V8 CREWCAB P/U AUTOMATIC 5 SPD
Clear		14820	2008 FORD F250 5.4L V8 CREWCAB P/U AUTOMATIC 5 SPD

- Available columns include the following: Remove, PM, Asset ID, Asset Description, Meter 1, Meter 1 Validation, Life Meter 1 Usage, Meter 2, Meter 2 Validation, Life Meter 2 Usage, Child Work Order ID, Service Status, WO Status, Job type, Date In, Finish, Date Finished, Close, Date Closed, Begin Shop Downtime, Shop Downtime Begin, End

Shop Downtime, Shop Downtime End, Begin User Downtime, User Downtime Begin, End User Downtime, User Downtime End, Warranty, Approved, Estimated Hours, Estimated Cost, Est Completion Time, Child Work Order Title

- To finish or close multiple child work orders, check the **Finish** or **Close** checkbox for each work order or check the **Finish** or **Close** checkbox in the header.

Assets		Tasks		Associate Existing WOs	
Add Assets		☐ Open All PLANNING/PENDING Work Orders			
Job type	Date In	Finish	Date Finished	Close	Date Cl
REPAIR ▼	06/19/2019 10:43 AM	☐		☐	
REPAIR ▼	06/19/2019 10:43 AM	☐		☐	
REPAIR ▼	06/19/2019 10:43 AM	☐		☐	
REPAIR ▼	06/19/2019 10:43 AM	☐		☐	
REPAIR ▼	06/19/2019 10:43 AM	☐		☐	
REPAIR ▼	06/19/2019 10:43 AM	☐		☐	

Tasks Tab

Use the **Tasks** tab to add tasks to parent and child work orders, or job-on employees to work orders. The tasks are also added to all associated work orders.

Assets		Tasks		Associate Existing WOs	
Delete	Task ID			WAC	
☐	000-800	Start	Lookup	VEHICLE INSPECTION - SEE NOTES	
☐	002-107	Start	Lookup	ENGINE - BELT	
Clear		Lookup			

You can remove a task from the parent work order if needed.

To delete a task from the parent work order:

1. Check the **Delete** box next to the task.

 Note: If you check the **Delete** box at the top of the column, all the tasks are deleted.

 Tasks deleted from a parent work order are deleted from all child work orders.

2. Click **Save Multi-asset WO**.

Assets	Tasks	Associate Existing WOs
Delete ☐ ☒ ☐ Clear	Task ID 000-800 Start Lookup VEHICLE INSPECTION 002-107 Start Lookup ENGINE - BELT Lookup	

To job-on an employee:



Note: If jobbing-on an employee to a multi-asset work order, the portal setting **Allow Supervisors to Job on Technicians** must be enabled, and the labor method must not be only set to POST.

1. Click **Start**.

Assets	Tasks	Associate Existing WOs
Delete ☐ ☒ ☐ Clear	Task ID 000-800 Start Lookup VEHICLE INSPECTION 002-107 Start Lookup ENGINE - BELT Lookup	

2. Select the employees from the **Task Details** pop-in.

Task Details - ACA-2018-669 - 000-800

Task ID: 000-800 VEHICLE INSPECTION - SEE NOTES

Starting Task:

WAC

Comment

Cancel

Select Employees

3. Click **Start Task**.

Associate Existing WOs Tab

The **Associate Existing WOs** tab allows you to associate a work order with a parent work order. Use this functionality for orphaned work orders or others that need to be associated with a parent work order.

Assets	Tasks	Associate Existing WOs
Clear	Location	Year
Clear	1 ...	2019
		46 ...
		CAR01 🔍

To associate an existing work order with a parent work order:

1. Enter the location, year, and work order number in the corresponding columns.
2. Click the **Save Multi-asset WO** button.

Buttons

The Multi-asset Work Order parent page also contains buttons for posting labor, parts, commercial work, usage, and Files.

Multi-asset Work Order ID: QA-FULL-01-2025-122 🔍

Created By: CN-EMP

Job Type: REPAIR

Status: OPEN

Warranty: UNKNOWN

Account:

Priority: 02 MED.PRIORITY - 3 DAYS OUT OF SERVICE 3 DAYS

Work Class:

PM Service:

Standard Job:

Title: TEST TEST

Date Opened: 02/04/2025 11:52 AM

Date Finished:

Date Closed:

Repair Reason: QA-1 REASON 1 - BASIC

Repair Site: QA QA'S REPAIR SITE

PM Scheduled:

Requests

Post Labor

Post Parts

Commercial Work

Post Usage

Files

Notes

Requests

The **Requests** button launches the Requests pop-in which allows you to enter the following information: Request Type, Asset Selection, Asset Count, Account ID, Task ID, Date Required, Location ID, Part ID, Description, NFI, Qty, Total Qty and Comments.

The screenshot shows a software window titled "Requests - LOC1-2018-264" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Request Type:** A dropdown menu with "PART" selected.
- Asset Selection:** A dropdown menu with "NON-LINEAR" selected.
- Asset Count:** A text input field containing the value "1".
- Account ID:** A text input field followed by a button with three dots "...".
- Task ID:** A text input field containing "001-000-0000" followed by a button with three dots "...". To the right of this button is the text "ELECTRICAL SYSTEM - TROUBLESHOOT - ISSUE FOUND".
- Date Required:** A date picker showing "06/19/2019" with a calendar icon.
- Location ID:** A text input field containing "1" followed by a button with three dots "...". To the right of this button is the text "OPS".
- Part ID:** A text input field followed by a hyphen "-", another text input field, a button with three dots "...", and a button labeled "Part Lookup".
- Description:** A text input field.
- NFI:** A checkbox.
- Qty:** A text input field followed by a dropdown menu with "Per line" selected.
- Total Qty:** A text input field containing "0.00".
- Comments:** A large text area.

At the bottom of the window, there are two buttons: "Cancel" and "Save".

Click **Save** to post requests to the child work-orders.

Post Labor

The **Post Labor** button allows you to post labor information for multiple assets, including linear assets.

To post labor to a work order:

1. On the Parent Work Order page, click **Post Labor**.

This opens the Post Work Order Labor pop-in.

Post Work Order Labor - ACA-2018-669

Selected Employees:

Add Employee ... Add Add Crew ... Add

Task ID ... Lookup

Time Code ...

Classification ...

WAC ...

Account ID ...

Date ...

Shift ID ...

Hours Allocation Method Apportion by # of selected rows

Reversal ☐ No Parts Needed ☐

Comment to apply to selected rows

	Asset ID	Work Order ID	Hours to be Applied	Comments	Position ID	Service
☐	VEHICLE-1	ACA-2018-670			...	
☐	VEHICLE-2	ACA-2018-672			...	
☐	VEHICLE-3	ACA-2018-674			...	

Cancel Save

 Note: Only work orders that are in OPEN or WORK FINISHED status will display.

2. Fill out the following fields: Add Employee or Add Crew (depending on who did the work), Task ID, Time Code, WAC, Account ID, Date, Shift ID, Labor Hours (per employee), Reversal, and Comments (that will apply to selected rows).
 - Labor is allocated by percentage across selected assets automatically. Hours can be manually entered in the **Hours to be applied column** either per work order or by equal distribution. You will be able to directly edit the hours at the summary level and the page will show a running total of labor hours entered on each line. Click **Cancel** to close the dialog to go back to automatic distribution after this point.
3. Once you add the employee or crew that performed the work and the hours performed, select the assets this labor will apply to.
 - i. Select the assets:

- To select all assets, click the checkbox at the top-left corner of the Asset ID column.
 - To select specific assets, click the applicable checkbox for the asset.
- ii. Add Comment, Position, and Service Request ID to the selected assets as desired.
- iii. If work was performed on only one asset, select the asset to have all the labor hours applied to its child work order. If dividing work among two or more assets, select the assets to have the labor hours divided equally among the child work orders.
 - If non-linear assets only are selected, the labor will be equally divided between the assets.
 - If linear assets only are selected, the labor will be distributed based on linear area.
 - If a mix of linear and non-linear assets is selected, a prompt will automatically display which will allow you to enter the percentages for non-linear and linear assets. If nothing is entered, labor will be distributed equally among the chosen assets. The percentages are converted into labor hours based on the total labor hours captured while the employee was jobbed-on to the multi-asset work order and entered as a posting to each selected child order.
- 4. Click **Save Multi-asset WO** to post the information to the child work orders accordingly.

Post Parts

The **Post Parts** button allows you to record parts information for multiple assets.

To post parts information:

1. On the Parent Work Order page, click **Post Parts**.

The Post Work Order Part pop-in displays.

Post Work Order Parts - ACA-2018-669

Task ID

...

Lookup

WAC

...

Date

📅

Issuing Location ID

...

ASSET CENTRAL ADMINIS*

Part ID

-

...

Lookup

Quantity Issued

Quantity Total

Allocation Method

Apply to each selected row

▼

Not from Inventory

☐

Unit Price

Comment to apply to selected rows

Account ID

...

Fail/cause ID

...

Bin ID

...

Invoice Date

📅

Description

Quantity on Hand

Warranty Vendor

...

Core Credit

☐

Core Unit value

☐	Asset ID	Work order ID	Quantity	Comments	Position ID	Installed Serial Number
☐	VEHICLE-1	ACA-2018-670			...	...
☐		ACA-2018-672			...	...
☐		ACA-2018-674			...	...

Cancel

Save

 Note: Only work orders that are in OPEN or WORK FINISHED status will display.

2. Fill out the information to be applied across selected assets. Part information fields include Task ID, Account ID, WAC, Fail/Cause ID, Date, Bin ID, Issuing Location ID, Invoice Date, Part ID, Quantity Issued (per work order), Warranty vendor, Not from inventory, Core Credit, Unit Price, Core Unit value, Comments (applied to selected rows).
 - Part quantity can be distributed automatically by entering them into the Quantity Issued field and selecting how you would like them distributed from the drop-down choice-list.
 - Per line – Post the specified quantity issued to each line
 - Divide across lines - Distribute quantity equally among all selected assets.
 - Divide across linear area - Appears if all selected assets are linear. This distributes by percentage of linear area across total linear area for all

selected assets. Note: Total linear area is the sum (length) for all selected assets.

- Quantity can be manually entered in the **Quantity** column either per work order or by equal distribution. If quantity is entered on any work order line item, the system will no longer automatically distribute parts. You will be able to directly edit the hours at the summary level and the page will show a running total of labor hours entered on each line. You may cancel the dialog if you want to get back to automatic distribution by clicking the **Reset Quantity Calculation** button that will appear above the **Quantity Total** field.
3. Complete the table fields. The table below allows you to provide comments, position ID, installed and removed serial numbers, purchase order ID, date received, and service request ID for the individual assets listed.
 4. Select the checkboxes for each asset this information applies to and click **Save Multi-asset WO** to save the information and post it to the selected child work orders. Quantity Issued is then issued to each child work order selected.

Commercial Work

The **Commercial Work** button allows you to record commercial information for multiple assets.

To post commercial work:

1. On the Parent Work Order page, click **Commercial Work**.

The Post Commercial Work pop-in displays.

Post Commercial Work - ACA-2018-669

Vendor ID ... Contract ID ...

Task ID ... Account ID ...

Date ... Vendor Invoice ...

WAC ... Vendor WO ...

Labor Cost Taxable ☐ Rate ☐ Fail/Cause ID ...

Parts Cost Taxable ☐ Rate ☐ Invoice Date ...

Misc Cost Taxable ☐ Rate ☐ Reversal ☐ ...

Total No Parts Needed ☐

Allocation Method

Comment to apply to selected rows

☐	Asset ID	Work Order ID	Labor Cost	Parts Cost	Misc Cost	Comments
☐	VEHICLE-1	ACA-2018-670				
☐		ACA-2018-672				
☐		ACA-2018-674				

Note: Only work orders that are in OPEN or WORK FINISHED status will display.

2. Complete the upper portion of this tab with information to be posted across selected assets. Commercial information fields include Vendor ID, Task ID, Date, WAC, Labor cost (per work order), Parts cost (per work order), Misc cost (per work order), Taxable (for labor, parts, and misc costs), Rate (for labor, parts, and misc costs), Total, Allocation Method, Contract ID, Account ID, Vendor invoice, Vendor WO, Fail/Cause ID, Invoice Date, Reversal, No Parts Needed, and Comment (to apply to selected rows).
 - **Vendor Contract ID** allows you to search for the vendor contract. This defaults to contracts and vendors available depending on the amount used and date (if the contract is or will be active during the date chosen).
 - Cost is distributed automatically by entering it into the **Labor Cost**, **Parts Cost** and **Misc Cost** fields and selecting how you would like it distributed from the drop-down choice-list next to the **Total** field.
 - Divide across lines - Distribute cost equally among all selected assets.
 - Divide across linear area - Appears if all selected assets are linear. This distributes by percentage of linear area across total linear area for all

selected assets. Note: Total linear area is the sum (length) for all selected assets.

- Cost can be entered in the **Labor Cost**, **Parts Cost** and **Misc Cost** columns either per work order or by equal distribution. If costs are entered on any work order line item, the system will no longer automatically distribute costs. You will be able to directly edit the costs at the summary level and the page will show a running total of cost entered on each line. You may cancel the dialog if you want to get back to automatic distribution by clicking the **Reset Cost Calculation** button that will appear next to the **Total** field.
3. Complete the table fields. The table allows you to provide Comments, Position ID, and Service Request ID for each asset listed. Charges are applied to each child work order selected.
 4. Select the checkboxes for each asset this information applies to and click the **Save Multi-asset WO** button to save the information and post it to the selected child work orders.

Post Usage

The **Post Usage** button allows you to record equipment usage information for multiple assets. Fields that display in this pop-in may depend on your organizations settings.

To record equipment usage:

1. On the Parent Work Order page, click **Post Usage**.

The Post Usage Tickets pop-in displays.

Asset ID	Work Order ID
VEHICLE-1	ACA-2018-395
VEHICLE-1	ACA-2018-396
VEHICLE-1	ACA-2018-397
VEHICLE-1	ACA-2018-649
VEHICLE-1	ACA-2018-659



Note: Only work orders that are in OPEN or WORK FINISHED status will display.

2. Complete the upper portion of this tab with information to be posted across selected assets. Usage tickets information fields include Equipment ID, Usage Date, Operator ID, Task ID, Hours Used, Reversal, Meter 1 Begin, Meter 1 End, Meter 1 Validation, Meter 2 Begin, Meter 2 End, Meter 2 Validation, Date and Time Begin, Date and Time End, Account ID, and Pool Location ID.
 - **Equipment ID:** Defaults if there are assets assigned to the current user's operator ID. If there is more than one asset, the chooser defaults the list of assets assigned to the operator ID. The Lookup button displays if the current user has equipment assigned via an operator ID, or if the user is a crew lead.
 - **Operator ID:** Operator defaults to the current user's operator ID if one exists. If the user is a crew lead, this field defaults to blank. The Lookup button displays if the user is a crew lead, to look up the operator IDs of crew members.
 - **Account ID:** Defaults from the work order.
 - **Pool Location ID:** This field defaults from your motor pool dispatch location ID.
3. Complete the table. The table allows you to select the assets to associate with the equipment usage. Select the checkboxes for each asset this information applies to.

4. Click **Save Multi-asset WO** to save the information and post it to the selected child work orders.

Files

Clicking the Files button launches the Work Order Files pop-in where files and related file links are displayed.

Work Order Files	
Multi-asset Work Order ID QA-FULL-01-2025-122	
Multi-asset Work Order ID QA-FULL-01-2025-122 	Job Status OPEN
Job Type REPAIR	
Related File Links	

7. Shop Calendar

On the main portal, Work Order Management, or Work Order Assignment Detail pages, click **View Calendar**, to open the shop calendar. The Shop Calendar page is a visual tool that allows supervisors to schedule technicians to work on equipment. Work Orders and tasks that are displayed are for your current work location (not the work order locations).

The screenshot shows the Shop Calendar interface. At the top, there's a title bar "Shop Calendar" with a refresh icon. Below it, the "Current Working Location" is set to "ACA - ASSET CENTRAL ADMINISTRATION". The "Current Filter" is "*NOLOWERLVEMPLOYEES" with a "Clear Filter" button. The "Employees Filter" section shows "NOLOWERLVEMPLOYEES" with "Save", "Set as Default", and "Remove" buttons. The "Shift" is set to "ALL SHIFTS". The "Lower-level Location Employees" are set to "None". The "Shop Capacity" section shows: Capacity Hours: 8.50, Non-work Activity Hours: 7.50, Assigned Hours: 0.00, and Hours Available: 1.00. A small calendar for June 2019 is visible, with the 10th highlighted. Below these are tabs for "Overview", "Employees", and "Crews". The "Overview" tab is active, showing a grid of time slots (12 AM, 1 AM, 2 AM, 3 AM, 4 AM, 5 AM) and a list of technicians and crews. The "Status" column shows "00" and "30" for each time slot. The "Signs: Signs Crew" and "AA: Asset Administrator" are listed. At the bottom, there are buttons for "Back", "Service/Inspection Due", "New Work Order", and "<< Open Panel".

To see a quick overview of today's basic information for your location, click the more info button next to the Shop Calendar title bar. This option is not available in the month view. Whether this shows when you first get to the Shop Calendar page or not is set with your user preferences.

This screenshot is a cropped version of the previous one, focusing on the top section. The "Shop Calendar" title bar has a small circular icon with a plus sign next to it, which is highlighted by a red circle and a mouse cursor. Below the title bar, the "Current Working Location" and "Current Filter" are visible. The "Overview", "Employees", and "Crews" tabs are at the bottom, along with the "Daily", "Weekly", and "Monthly" view selectors.

Shop Calendar

Current Working Location: ACA - ASSET CENTRAL ADMINISTRATION

Current Filter: *NOLOWERLVEMPLOYEES Clear Filter

Employees Filter: NOLOWERLVEMPLOYEES Save Set as Default Remove

Shift: ALL SHIFTS

Lower-level Location Employees: ☐ All ☒ None ☐ Select

Shop Capacity

Capacity Hours:	8.50
Non-work Activity Hours:	7.50
Assigned Hours:	0.00
Hours Available:	1.00

June 2019

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Month Calendar

Shop Calendar

Current Working Location: ACA - ASSET CENTRAL ADMINISTRATION

Current Filter: *NOLOWERLVEMPLOYEES Clear Filter

Employees Filter: NOLOWERLVEMPLOYEES Save Set as Default Remove

Shift: ALL SHIFTS

Lower-level Location Employees: ☐ All ☒ None ☐ Select

Shop Capacity

Capacity Hours:	8.50
Non-work Activity Hours:	7.50
Assigned Hours:	0.00
Hours Available:	1.00

June 2019

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

The mini, month-view calendar in the top left of the day calendar page indicates:

- The current date: The current date (today) has a red border.
- The selected date: The selected date has a blue background.



Note that it is possible for both dates to be the same as in the screenshot above.

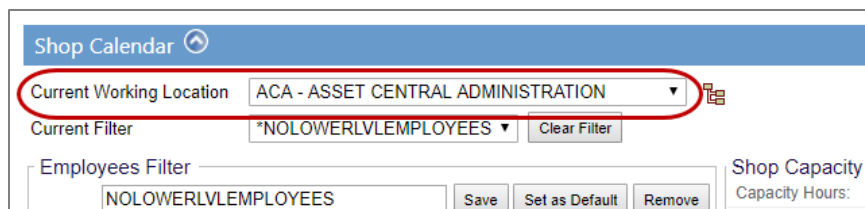
Click a date in the mini, month-view calendar to show by-day scheduling information for the selected date.



To select a date in another month, change the month by clicking the < or > icons, then select a date in that month. Clicking on a grayed-out date (date in another month) will not produce results.

Shop Calendar

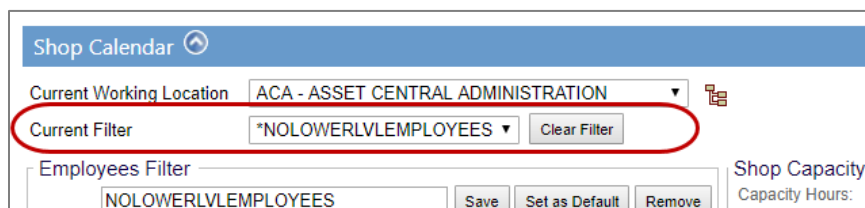
Current Working Location



The screenshot shows the 'Shop Calendar' header. Below it, the 'Current Working Location' dropdown is set to 'ACA - ASSET CENTRAL ADMINISTRATION' and is highlighted with a red circle. Below this, the 'Current Filter' is set to '*NOLOWERLVLEMPLOYEES' with a 'Clear Filter' button. The 'Employees Filter' section shows a text input with 'NOLOWERLVLEMPLOYEES' and buttons for 'Save', 'Set as Default', and 'Remove'. To the right, 'Shop Capacity' and 'Capacity Hours' are displayed.

The **Current Working Location** is a drop-down list consistent with the other location selectors in the portal, based on the assigned, supported, and station location. The selected location does not change until user manually selects a new location.

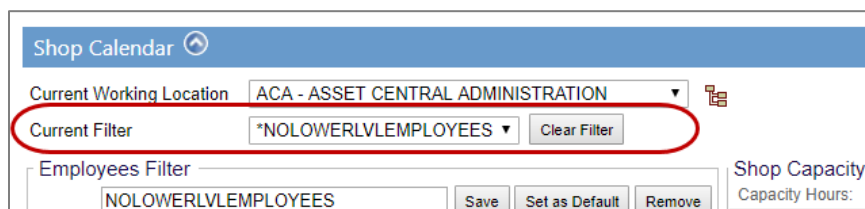
Current Filter



This screenshot is identical to the previous one, but the 'Current Filter' dropdown, which is currently set to '*NOLOWERLVLEMPLOYEES', is highlighted with a red circle.

This filter is a drop-down list that allows you to select which filter is applied to the calendar. Set up the called filter using the Employees Filter section.

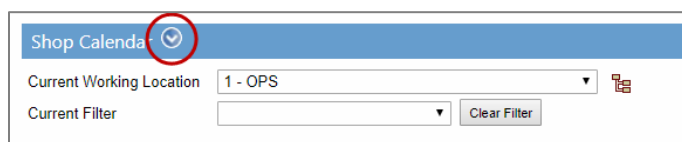
Employees Filter



This screenshot is identical to the previous ones, but the 'Employees Filter' section, which includes a text input with 'NOLOWERLVLEMPLOYEES' and 'Save', 'Set as Default', and 'Remove' buttons, is highlighted with a red circle.

Use the Current Filter drop-down to switch the filters that the calendar is currently using. By default, this field will not have any available filters until filters are created.

To access the area to define filters, click the arrow button to expand this section.



This screenshot shows the 'Shop Calendar' header with a small circular arrow button (expand/collapse icon) highlighted with a red circle. Below the header, the 'Current Working Location' is set to '1 - OPS' and the 'Current Filter' is empty with a 'Clear Filter' button.

To set up a filter:

1. Choose a location in the **Current Working Location** drop-down.

- Enter the name of the filter in the blank field next to the **Save** button.

- If multiple shifts are defined for the location, in the **Shift** drop-down, choose the shift this filter will apply to.
- In the Lower-level Location Employees area, check either **All**, **None**, or **Select** to allow this to be available to all lower-level locations, no lower-level locations, or to select certain locations.
 - If you choose **Select**, an extra option area displays to allow you to select locations.

- Find the locations with the chooser button. Chosen locations are added to the list.

- Select a location in the list and click **Remove** to remove that location. Or, you can click **Remove All** to remove all locations in the current list.
- When you are done with the filter, click **Save**.

To remove a filter:

- Select the filter you want to remove in the **Current Filter** drop-down.
- Click **Remove**.

To set a default filter:

- Select the filter you want to set in the **Current Filter** drop-down.
- Click **Set as Default**.

To edit a filter:

1. Select the filter you want to edit in the **Current Filter** drop-down.
2. Make the necessary changes to the filter.
3. Click **Save**.

Facility Detail Button

Shop Calendar

Current Working Location: ACA - ASSET CENTRAL ADMINISTRATION

Current Filter: *NOLOWERLVEMPLOYEES

From the main Shop Calendar page, click the **Facility Detail** button to go to the Facility Details page for the selected location.

Facility Detail

Current Working Location: ASSET CENTRAL ADMINISTRATION

Address

ADDRESSEE
LINE 2, PRIMARY ADDRESS
LINE 3, SECONDARY ADDRESS
LINE 4, CITY, STATE, ZIP

Contact

Technicians: 336 ALL SHIFTS

Bays: 0

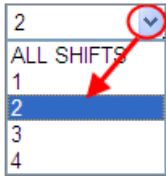
Employee ID	Name	Occupation
0711	UNDESIGNATED	
- S4 (PRIMARY)		
12124	UNDESIGNATED	
- S4 (PRIMARY)		
1234	UNDESIGNATED	
1282	UNDESIGNATED	
1321	UNDESIGNATED	
1326	UNDESIGNATED	
1631	UNDESIGNATED	
2122	UNDESIGNATED	
- ETR1 (PRIMARY)		

This page provides a view-only look at the facility details including current working location, address, contact, technicians, and bays. Click the magnifying glass icon to open the Employees - Primary Information screen.



Note: Unscheduled technicians are displayed in red.

Shift Filter



The **Shift filter** is a drop-down list consisting of all shifts, as well as a list of shifts defined for the selected location. When the selected location changes, the list of shifts is updated. If an employee's shift does not match one of the shifts as defined for the selected location, the employee does not show on the calendar.



Note: If your lower-level location employees setting is set to include lower-level locations, the shift filter will update to include shifts defined on the lower-level locations as well as the current location.

Crew Assignments on the Shop Calendar

The Shop Calendar displays crew assignments for employees assigned to the crew so it is obvious what employees are involved with the crew's work. The crew assignments are indicated with the following icon: .



Note: Crew assignments shown on the employee's schedule in Shop Calendar will not allow changes. You must manage the crew assignment directly in Crew Management to update its scheduled time or remove the employee from the crew.

Service/Inspections Due

From the Shop Calendar page, click the **Service/Inspection Due** to open the Service/Inspections Due page for the selected location.

The Service/Inspections Due page displays.

Services and Inspections Due
Current Working Location
Map
Calendar
Services and Inspections Due
Current Filter

Current Working Location

Current Location 1 - OPS

Map

Calendar

Services and Inspections Due: 15 for Run ID 61721

☐ Generate work orders for all units listed
 ☐ Group services due onto one work order per equipment unit
 ☐ Group work orders onto a multi-asset work order

Status for generated work orders PENDING
Location ID for generated work orders [ASSIGNED PM LOCATION]

Generate Work Orders

☐	Equip ID: Desc	Parent Equip ID: Desc	Out of Service	PM Ext. Avail	Rea
☐	FLO2: AFEQUIP		N	N	D
☐	FLO3: AFEQUIP		N	N	D
☐	FLORESEQUIP: AFEQUIP		N	N	D
☐	FLOW5: AFEQUIP		N	N	D
☐	FLO1: AFEQUIP		N	N	D
☐	FLO9: AFEQUIP		N	N	D

Back
 Define Filter
 Clear Filter
 Quick Filter

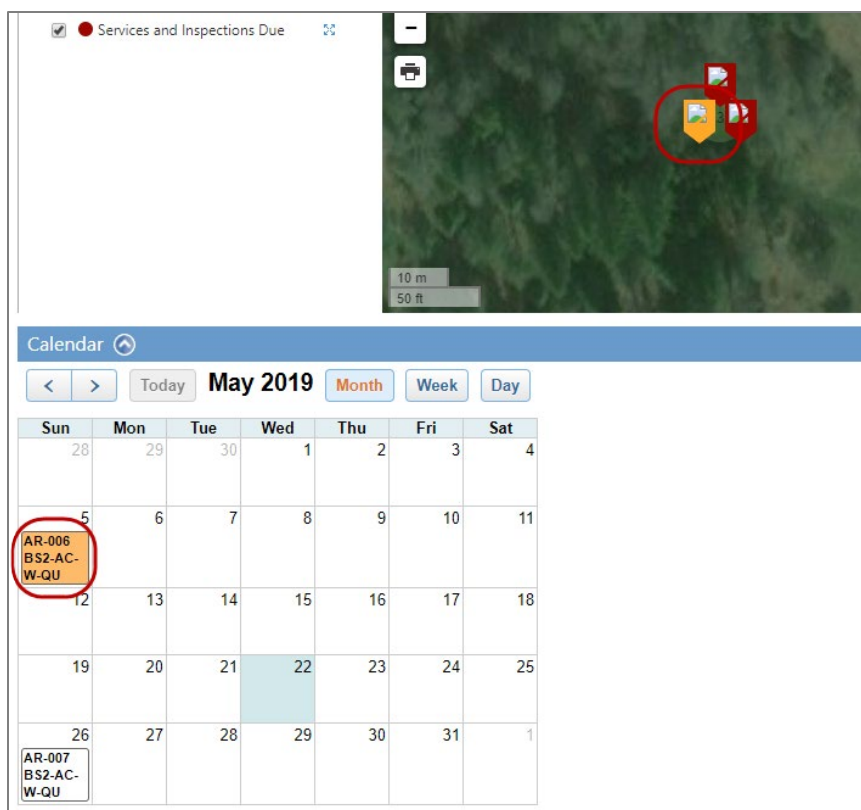
This page lists the services and inspections due on vehicles at the selected location. If you do not see the services and inspections details listed when you first get to the page, click **Get Data**.



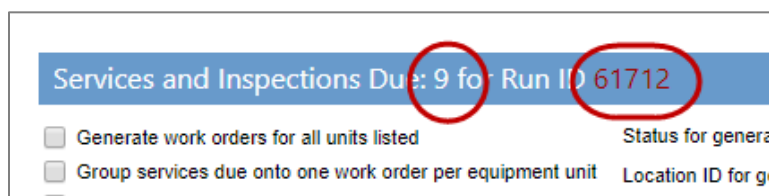
Note: If your organization does not use meter information with services and inspections, it is possible to hide the meter columns through the user interface control. Refer to the Administrator Guide, User Interface (UI) Options section for information about modifying the UI.



Note: The Map section only displays if your organization is licensed for mapping, and the Map and Calendar sections only display if the location profile is set to display these sections. If these items options are both enabled, click the item in the calendar to highlight the asset in the map



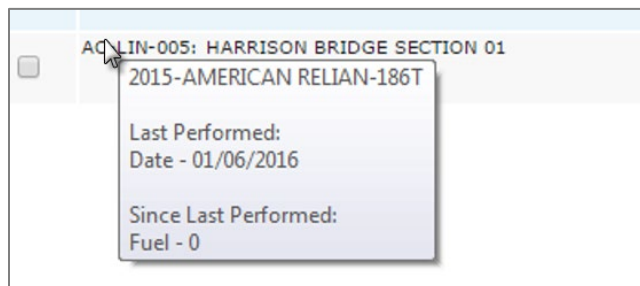
The total number of services and inspections due displays at the top of the list along with a link to the Eq PM Due Run ID Report.



To open work, do one of the following (each item opens a different set of work orders):

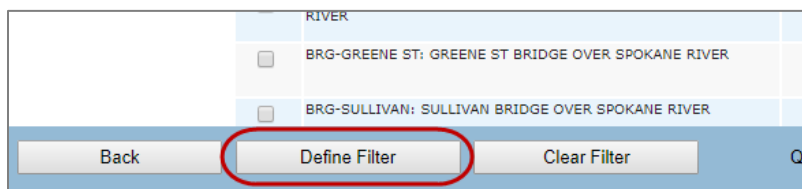
- To open work orders for all the units listed, check the box for **Open Work Orders for All Units Listed** and then click the **Open Work Orders** button.
- To group the different services that are due and open one work order per equipment unit, select the desired rows (by checking the box for the rows), then check the box for **Group services due onto one work order per equipment unit**. Then, click **Open Work Orders**.
- To group work orders together into a multi-asset work order, check the **Group Work Orders onto a Multi-asset Work Order** box.
- To open individual work orders, check the individual rows and then click the **Open Work Orders** button.

-  Hovering over the Equipment ID displays a popup with details about the last service or inspection.

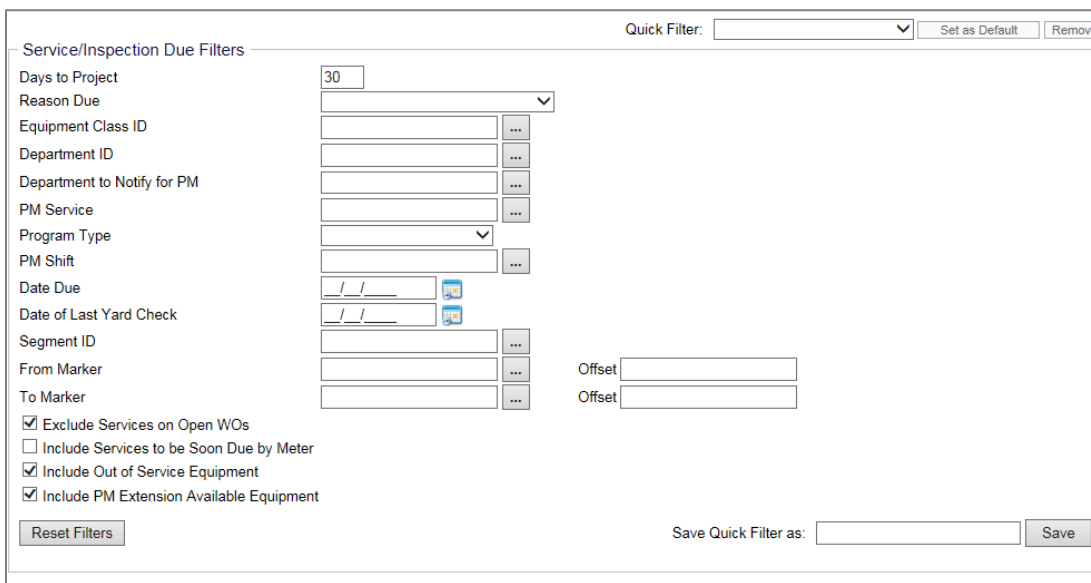


To further define the filter:

1. Click **Define Filter**.



The Service/Inspection Due Filters page displays.



2. Complete the fields as desired and then do one of the following:

Apply filter:

- i. In the bottom-left hand corner, click the **Apply Filter** button to display the services and inspections due based on your newly defined filter.

Save a new quick filter:

- i. In the bottom-right hand corner, type a name in the **Save Quick Filter as** field and click the **Save** button to save the quick filter.

Filter saved displays and the Quick Filter shows in the drop-down list above.



Note: You can set the filter as the default and remove the filter from the list by following typical quick filter instructions mentioned previously.

- ii. Click **Apply Filter**.

A new list displays based on the newly defined filter and the Quick Filter shows in the Current Filter field.

Current Working Location
Current Location: **MAIN - MAIN LOCATION**

Services and Inspections Due: 1 for Run ID **58186**

☐ Open Work Orders for All Units Listed
 ☐ Group services due onto one work order per equipment unit
 ☐ Group work orders onto a multi-asset work order
 Open Work Orders

	Equip ID: Desc	Out of Service	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	PM Shift	Last
☐	EQ-002: INDIVIDUAL PMS	N	DATE	B	01/16/2014	47%	0	0	0	0		Date - 12/1 Meter 1 - 0 Meter 2 - 0

Current Filter: **PM-B**

Include Out of Service Equipment: Y, PM Service: B, Exclude Services on Open Work Orders: Y, Projection Days: 30, Include Services Soon Due by Meter: N

What do you want to do?

View Buttons

When using the calendar, use the view buttons to switch between several views to see different information you may need. Depending on your views, the calendar may show:

- Which technicians or crews are assigned to the location
- Which technicians or crews are loaned to a supervisor who is assigned to the location, but excludes technicians and crews that are loaned to a supervisor who is NOT assigned to the location
- Employee absent time, and other scheduled non-work activities for the employee and shop (hence net hours instead of gross hours)

Employee Views

There are three buttons to view different views of employees in the calendar below. These options include Overview, Employees, and Crews.

Overview

Overview	Employees	Crews
-----------------	-----------	-------

The month calendar defaults to the **Overview** view which provides summary information including work orders, available hours, scheduled hours, and a colored bar that indicates the ratio of scheduled hours to available hours. The bar will be one of the three following colors:

- The bar is green when the scheduled hours are less than 50% of the available hours.
- The bar is yellow when the scheduled hours are 50- 90% of available hours.
- The bar is red when the scheduled hours are greater than 90% of available hours.

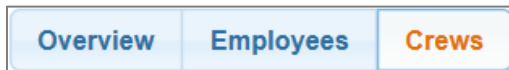
Other calendar views will show all crews and employees associated to the location as rows on the calendar. The calendar header will show summary information as well.

Employees



Click **Employees** to view the calendar details for employees. The month calendar allows you to use the Current Employee drop-down selection menu to view the calendar summary for a selected employee. Other calendar views will show all employees associated to the location as rows on the calendar.

Crews



Click **Crews** to view calendar details for specified crews. Similar to Employees, the month calendar allows you to use the Current Crew drop-down selection menu to view the calendar summary for a selected crew. Other calendar views will show all crews associated to the location as rows on the calendar.

Multiple crews can be assigned to a single work assignment.

Calendar Views

There are three views to choose from when it comes to time frames viewable on the calendar itself. These three views are daily, weekly, and monthly.

Daily View



This defaults to show the current day, or the day you have selected on the month calendar at the top-left of the page. The day is broken into half hour increments and employee events show to the right of each employee in the appropriate time slots, and will show the duration of the activity.

		6 AM		7 AM		8 AM		9 AM		10 AM		11 AM		12 PM		1 PM	
Technicians	Status	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30
EMP-AC: ANTHONY CARTWRIGHT	→C																
EMP-AC2: ARTHUR CARTWELL	●																
EMP-AC3: ALEX CARTWELL																	
EMP-AC4: KENNETH LUCAS	→C																
EMP-AC5: ANDREW PADRELLI	→C																
EMP-AC6: JUSTIN CARTWELL	●																
NOT ASSIGNED	N/A																

Weekly View

Daily
Weekly
Monthly

The weekly view shows the current week, or the week of the day you have selected to look at on the month calendar at the top-left of the page. Employee events show in time order on each day for each employee.

If the portal is set up to display detailed information, the department and asset names and descriptions display alongside the IDs.

		5/29/2016 - 6/4/2016			
Technicians	Status	5/29/2016	5/30/2016	5/31/2016	6/1/2016
EMP-AC: ANTHONY CARTWRIGHT	→C			08:00 AM - ACLOCI-2014-5	
EMP-AC2: ARTHUR CARTWELL	●			01:00 AM - ACLOCI-2014-6	07:00 AM - 1353752 07:30 AM - ACLOCI-2014-1
EMP-AC3: ALEX CARTWELL					
EMP-AC4: KENNETH LUCAS	→C			08:00 AM - ACLOCI-2014-5	

Monthly View



The monthly view shows the month corresponding to the default day you are looking at, or the month you have selected on the month calendar at the top-left of the page.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
			09:00 AM - Non-work Activity	07:00 AM - 1-2016-5		
			01:30 PM - Non-work Activity	09:00 AM - Non-work Activity		
			03:30 PM - 1-2016-6			
27	28	29	30	31	April 1	2
03:30 PM - 1-2016-6						

The month calendar considers the following items:

- Which technicians are assigned to the location
- Which technicians are loaned to a supervisor who is assigned to the location
- Excludes technicians that are loaned to a supervisor who is NOT assigned to the location
- Shift filter (not shown), if something other than **ALL SHIFTS** is selected
- Employee time absent, and other scheduled non-work activities for the employee and shop (hence net hours instead of gross hours)

New Work Order Button

Click the **New Work Order** button to go to the initial [New Work Orders](#) page.

Schedule Panel

Open Panel button

Some features are grouped under the **Open Panel** button. When you click **Open Panel**, a panel opens on the right side of the page. This panel allows you to schedule non-work activity, and see different work through filters and searches. These options are grouped by work orders, service requests, and multi-asset work orders. Additional columns can be added to this table by the standard workflow described in the *General Application Information* guide.



Note: **Open Panel** changes to **Close Panel** when the panel is open.

The screenshot shows the Shop Calendar interface. On the left, there are filters for Current Working Location (BY-LOC1), Current Filter, Employees Filter, and Shop Capacity. Below these are tabs for Overview, Employees, and Crews, and a calendar view for the month of April. On the right, the Open Panel button is highlighted with a red circle. Clicking this button opens a panel on the right side of the page. This panel contains a 'Schedule New Activity' button, a 'Filter' button, and a 'Current Filter: Work Order Status: OPEN' section. Below this is a search bar and three tabs: 'Work Orders', 'Service Requests', and 'Multi-asset Work Orders'. The 'Work Orders' tab is selected, showing a table of work orders. The table has columns for ID, Asset, Department, PM Due, Title, and Work Order Due. The first three work orders are listed: BY-LOC1-2017-9, BY-LOC1-2018-67, and BY-LOC1-2018-88. The bottom of the panel has a '>> Close Panel' button.

Schedule New Activity Button

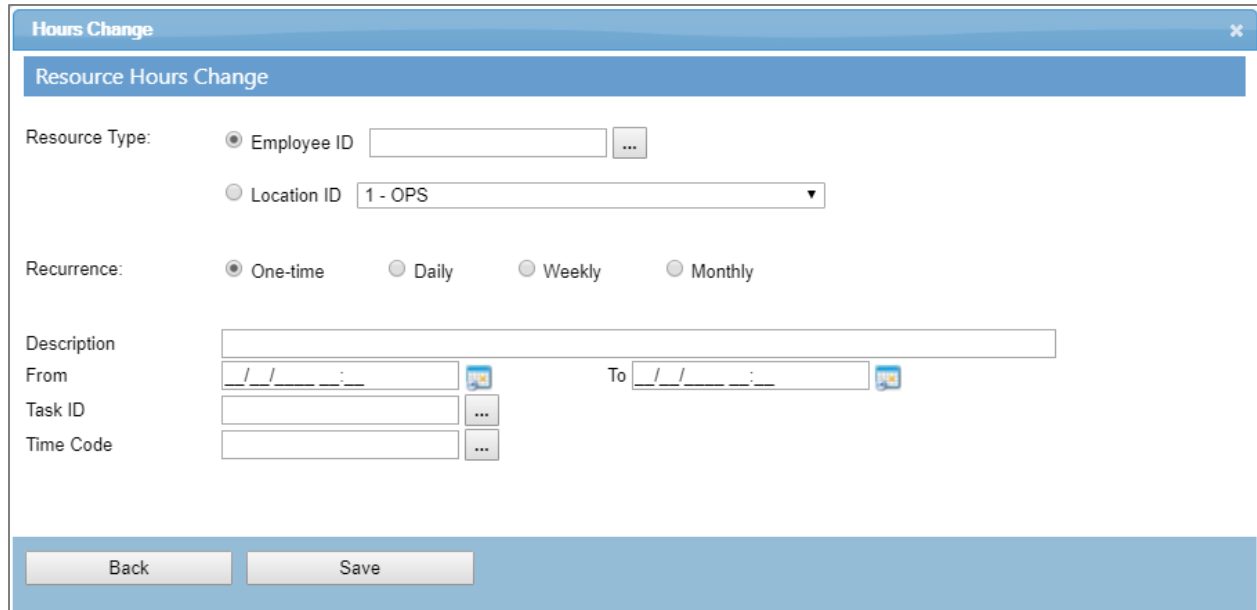
The **Schedule New Activity** button opens the Hours Change pop-in. This dialogue allows you to schedule employees for activities such as lunch, breaks, or vacation.



Hours are computed so vacation overrides lunches and breaks as set up by location.



To schedule a new activity, complete the fields on the pop-in and click **Save** to save your entry.



Hours Change

Resource Hours Change

Resource Type: ☒ Employee ID ... ☐ Location ID 1 - OPS

Recurrence: ☒ One-time ☐ Daily ☐ Weekly ☐ Monthly

Description

From To

Task ID ...

Time Code ...

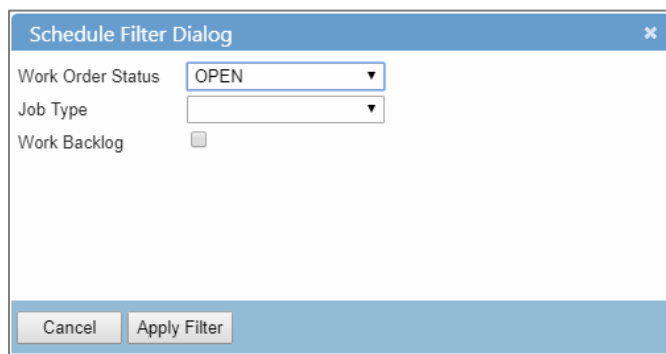
Back Save

The activity displays on the Day Calendar along with a message indicating the hours were successfully changed displays on the Day Calendar.

- ✓ Hover over the scheduled non-work activity to display information about the activity including work order, task code, time code, and equipment ID.

Filter and Search

Use these fields to search for specific work, or narrow down the items that show below for scheduling. The items that show in this list are items that are not yet assigned. When you assign an item to an employee or crew, the item disappears from the list. The filter you last used will be saved and reapplied the next time you come to this page.



Schedule Filter Dialog

Work Order Status

Job Type

Work Backlog ☐

Cancel Apply Filter

Work Order Status: Filter by status of either OPEN or PENDING.

Job Type: Filter by either REPAIR or PM types of jobs.

Work Backlog: Check this box to show work backlog. Backlog work is work that was previously scheduled, but was not finished, and has not been scheduled for another day. Once an

appointment is created for today or later, or if a final status WAC is placed on all WO tasks, the work order will no longer show in the backlog view.

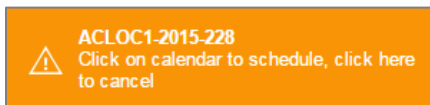
Scheduling Work Order and Service Requests

You can easily schedule work order and service requests from the scheduling panel.

To schedule an appointment:

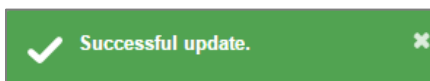
1. Click either **Work Orders**, **Service Requests**, or **Multi-asset Work Orders** to open the correct list of items.
2. Click the radio button to the left of the item you need to schedule. To cancel assigning this item, click the radio button again to deselect it, or click the new display message as shown below.

This displays a message showing the assignment you are scheduling.



3. Click on the employee on the calendar you want to schedule this WO or SR to.
4. The assignment is updated with the information on the employee and date and time scheduled.

Successful update is displayed.



Creating an Event

✔ Tip: This calendar is used to create work order-level assignments only. Web modules do not support creation of task-level appointments via the calendar. However, because the GUI and Enterprise Portal can create these types of assignments, the web modules calendar supports editing, moving, and copying these assignments that were created in these other means. If there is a task, the task code (description and WAC code) description is displayed in the hover.

Appointments vs Assignments

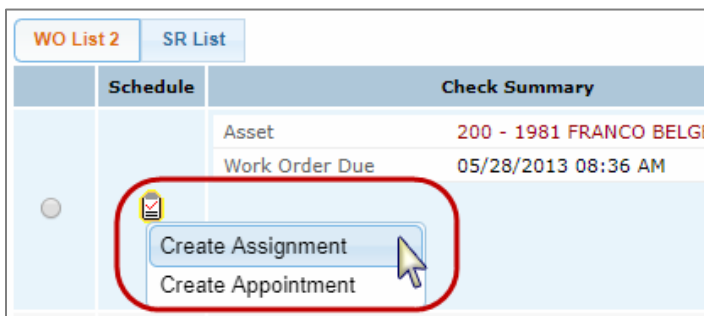
There are three different events to put on the calendar: appointments, assignments, and non-work activities. The differences between appointments and assignments are as follows:

- Create an appointment for items that you only have an allowable area of time in which to operate. An example of a good use of an appointment is when you have a bus coming in for work that is only be available for work for a certain amount of time before it has to leave the area.
- Create an assignment for most items when assigning work to technicians. Assignments is the recommended way to handle scheduling work for most users.

There are a couple of ways to create an appointment. See the section below to see how to create an appointment when creating a work order.

To create an appointment or assignment from the shop calendar:

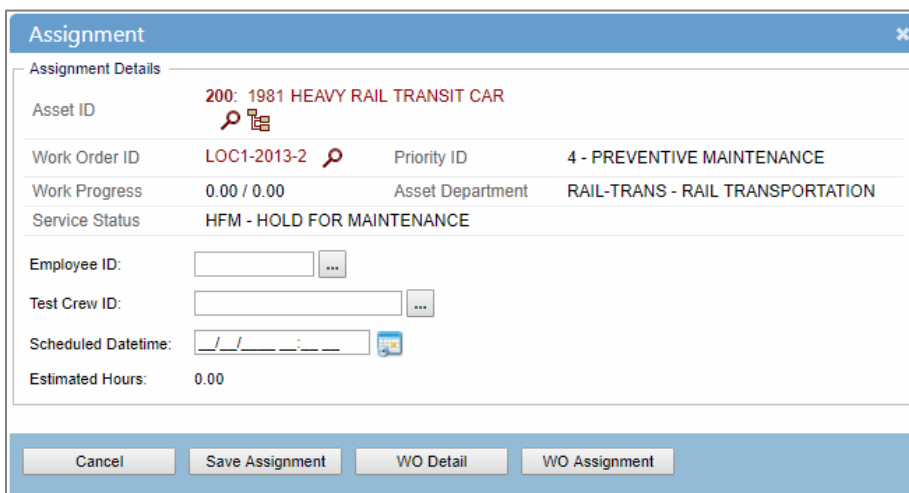
1. To create an event, open the scheduling panel, enable the Schedule column (if not visible) and click on the clipboard icon .



The Create Assignment or Create Appointment options appear.

2. Click the option to either create an assignment or appointment.

This opens the Assignment Details or Appointment Details pop-in.



3. Complete the fields.

- Click **Save Appointment** to create the event.

The appointment displays on the Calendar.

Summary

Shop Calendar

Current Working Location: ARLOC - LOCATION

Current Filter: [Dropdown] Clear Filter

Employees Filter: [Dropdown] Save Set as Default Remove

Shift: ALL SHIFTS

Lower-level Location Employees: ☐ All ☒ None ☐ Select

Shop Capacity

Capacity Hours: 191.87

Non-work Activity Hours: 0.00

Assigned Hours: 449.92 Unassigned Hours: 224.96

Hours Available: 191.87

May 2019

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

The **Summary Section** provides an overview of the total capacity hours, non-work activity hours, assigned hours, hours available, and unassigned hours.



Note: Planned work order hours affect shop capacity like regular work orders in the following ways:

- Increase the Assigned Hours if the planned work order has an employee ID set.
- Increase Unassigned hours if the planed work order has no employee ID set.
- Available hours are reduced by the amount of assigned hours.
- The monthly view has both assigned and unassigned reduce the amount of available hours, and increase the work order count. However, planned work orders will not increase the scheduled hours.

Lower Calendar

The Calendar portion of the page provides a list of technicians at the selected location along with their shifts and scheduled appointments, assignments, and non-work activities.

Calendar Information



Note: The Shop Calendar pages uses the Shop Activity setting for 12 vs. 24 hour date/time formatting for the purposes of displaying time data.

The list of technicians includes active employees who:

- Can charge time
- Can be scheduled

- Are associated with the current location. If an employee is set to a shift that is not listed on the current location's work calendar, they will not be shown on the shop calendar. This calendar looks for all shifts defined for that location.



The technician's shift must match the shift filter (unless **All Shifts** is selected, in which case the shift must be one of the location shifts as defined in the GUI).

Each technician row is highlighted based on the technician's shift (as defined by the employee calendar in the system). As depicted in the following screenshot, the shift-hours are white, while non-shift hours are shaded so the supervisor can easily see when an employee is scheduled to work. As shown below, the employee's hours are scheduled from 7:00-4:00 p.m.

		7 AM		8 AM		9 AM		10 AM		11 AM		12 PM		1 PM		2 PM		3 PM		4 PM	
Technicians and Crews	Status	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30
S: SHARON	●																				
		CAR ELECTRONICS REPAIR Work Order: 1-2019-51 CAR01 - ASSET001 DEPT - DEP1001 (07:00 AM - 01:00 PM)																			

The calendar also scrolls horizontally, so supervisors may see all hours in the day broken into 30 minute increments.



Note: You are not able to see all hours in the day at the same time. It is necessary to scroll to view more hours because only approximately 12 hours are visible at a time, depending on your browser, etc.

Each item is colored according to the item type and its status.

6/16/2019 - 6/22/2019				
	6/18/2019	6/19/2019	6/20/2019	6/21/2019
	02:00 PM - TEAM MEETING - REG	12:00 AM - CAR ELECTRONICS REPAIR 1-2019-51	12:00 AM - CAR ELECTRONICS REPAIR 1-2019-51	
			02:00 PM - MONTHLY CHECK IN - REG	
	02:00 PM - TEAM MEETING - REG			

Item Type

The colored background of the item itself tells what type of event it is.

- Red events: Appointments
- White events: Assignments
- Grey events: These are non-work related items such as breaks, training, meals, etc.

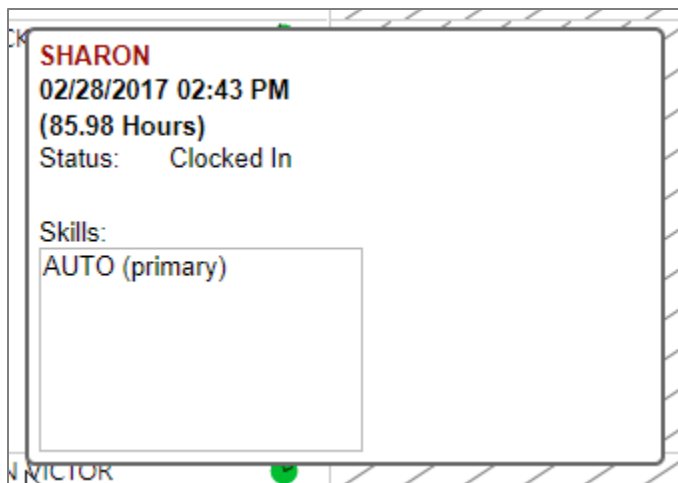
Status Type

The colored bar in each appointment indicates the following:

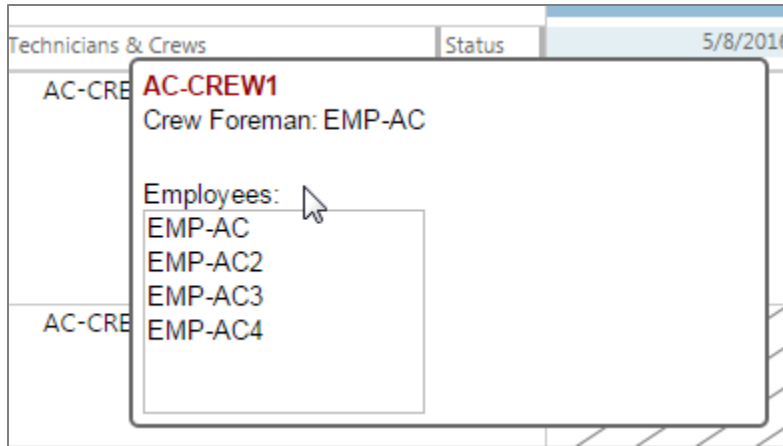
- Blue: The work is completed and the work order task has final status WAC.
- Green: The work is in progress for a work order and its tasks.
- Yellow: The work order task does not have final status Work Accomplished Code (WAC), or does not have a WAC at all.
- Red: A scheduled non-work activity (examples include: employee absence, daily shop meeting, etc.)

To see more information on employees and their assigned items:

- The list of technicians displays the Employee ID: Employee Name. Hover over a technician or the icon next to the technician to display a popup including the employee ID, employee name, skills, and information on the job they are currently jobbed onto if they are jobbed on. Skills are organized by primary skills (primary skills appear first in the list).

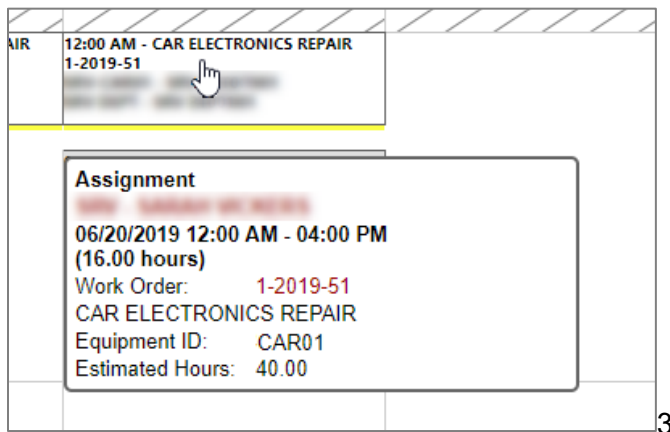


- Click on the red ID name hyperlink to open the Enterprise Portal Employee page in a new window (only if Enterprise Portal is licensed and installed).
- Crews are also shown in the list when calendar is set to Overview or Crews.



To see more information on the calendar assignments:

- Hover over work assignments to display: start time, end time, hours, work order or service request ID, task code - description, WAC code – description, employee ID – name, and comments (if any).



- Click the red **Work Order ID** to open the Work Order Main page or the Work Order Details page depending on your location settings
- Hover over scheduled non-work activities to show start time, end time, hours, task code, time code ID – description, and activity description (if any).
- Click a scheduled non-work activity on the calendar to go to the Resource Hours Change page, where the details of the non-work activity may be reviewed and modified. See the [Edit a Non-work Activity](#) section below for more information about this page.
- The **NOT ASSIGNED** row at the bottom of the technicians list contains all assignments and appointments that are scheduled for the day but that are not assigned to an employee or crew.

NOT ASSIGNED	N/A		
			12:00 AM - RAIL CAR-1-2941854 RAIL CAR-1

The Assignment Details Form

The Assignment Details form allows you to see and edit detail for your assignments. This form works on work order and service request assignments. Click the **New Assignment** button on the Work Order Main or Work Assignment Details pages to open the Appointment Details form. This form also show if you click directly on an appointment on the calendar.

Assignment

Assignment Details

Asset ID: 200: 1981 HEAVY RAIL TRANSIT CAR

Work Order ID: LOC1-2013-2 Priority ID: 4 - PREVENTIVE MAINTENANCE

Work Progress: 0.00 / 0.00 Asset Department: RAIL-TRANS - RAIL TRANSPORTATION

Service Status: HFM - HOLD FOR MAINTENANCE

Employee ID: ...

Test Crew ID: ...

Scheduled Datetime:

Estimated Hours: 0.00

Buttons: Cancel, Save Assignment, WO Detail, WO Assignment

The Assignment Details form includes:

- **Work Order:** The work order number
- **Equipment:** Serial No, Year, Make, Model Description or Part ID-Suffix: Short Description (if a part rebuild)
- **Employee ID:** A choice-list is provided that is based on the setting for direct reports. The choice-list either displays the logged-in supervisor's direct reports, or a list of employees who support the selected shop location. The location results for the employee search will display only employees at the locations available to the current logged-in user.
 - Choose or type an Employee ID to automatically lookup the employee name. Clear the Employee ID to clear the employee name. If the employee does not exist, **Not Defined** displays.
- **Crew ID:** A choice-list is provided to enter a crew ID.

- **Scheduled Date/Time:** The date and time chooser accepts inputs in either 12 hour or 24 hour format. When an existing appointment is loaded into the form, the format is based on portal settings.
- **Estimated Hours:** These are the estimated hours for the work order or service request. You cannot change the hours from this form as they are the sum of all the tasks under the work order or service request

The Assignment Details form has the following buttons:

- **Cancel:** Closes the popup appointment form.
- **Save Assignment:** Creates or updates the assignment – if there are errors, the error displays and allows the user to make corrections.
- **WO Detail:** Takes you to the Work Order ID or Service Request ID detail pages.
- **WO Assignment:** Takes you to the Work Order ID or Service Request ID assignment detail page.

The Appointment Details Form

The Appointment Details form allows you to see and edit detail for your appointments. This form works on work order and service request appointments. Click the **New Appointment** button on the Work Order Main or Work Assignment Details pages to open the Appointment Details form. This form also show if you click directly on an appointment on the calendar.

Appointment

Appointment Details

Asset ID	CAR01: EQTYPE		
Work Order ID	1-2019-51	Title	CAR ELECTRONICS REPAIR
Priority ID	1 - EMERGENCY/IMMEDIATE	Work Progress	0.00 / 0.00
Date and Time Due	06/14/2019 03:00 PM	Department ID	DEPT
Asset Department	DEPT001		

Task	WAC	Est Hours
TH REPAIR GROUP		40.00

Employee ID: ...

Datetime Start:

Hours:

Comments:

[Assignment Page](#)

The Appointment Details form header consists of the following information:

- Work Order ID
- Asset ID: Serial No, Year, Make, Model Description or Part ID-Suffix: Short Description (if a part rebuild)
- Priority ID, Date and time Due, Asset Departments, Title, Work progress, and Department ID
- List of Tasks: Sorted by WAC final status (descending), task code (ascending), task code description, WAC code description, and estimated hours.

The Appointment Details form fields include:

- **Employee ID:** A choice-list is provided that is based on the setting for direct reports. The choice-list either displays the logged-in supervisor's direct reports, or a list of employees who support the selected shop location. The location results for the employee search will display only employees at the locations available to the current logged-in user.

- Choose or type an Employee ID to automatically lookup the employee name. Clear the Employee ID to clear the employee name. If the employee does not exist, **Not Defined** displays.
- **Date/Time Start:** The date and time chooser accepts inputs in either 12 hour or 24 hour format. When an existing appointment is loaded into the form, the format is based on portal settings.
- **Hours:** Only positive numbers are allowed for hours. Fractional hours are allowed.
- **Comments:** Comments are optional.

The appointment form has the following buttons:

- **Cancel:** Closes the popup appointment form.
- **Save Appointment:** Creates or updates the appointment – if there are errors, the error displays and allows the user to make corrections.
- **Delete Appointment:** Deletes the appointment.
- **Copy Appointment:** Puts the appointment form in copy mode, which allows multiple appointments to be created for a given work orders.
- **Detail:** Takes you to the Work Order ID or Service Request ID detail pages.
- **Assignment Page:** Takes you to the Work Order ID or Service Request ID assignment detail page.

Edit an Event

The following instructions outline how to edit a calendar event which can be an appointment or assignment.

To edit an event:

1. Click on the appointment or assignment.

The Appointment or Assignment Details popup displays.

Appointment

Appointment Details

Asset ID: 12703: 1996 FORD HI RAIL/F-800 CREW CAB ASSIGNE 1996 FORD F800

Work Order ID: LOC1-2013-7 Priority ID: 3 - ROUTINE

Work Progress: 0 / 1.89 Asset Department: NON REV - NON REVENUE FLEET

Task	WAC	Est Hours
000-800 - PM TASKS - VEHICLE INSPECTION - SEE NOTES		0.00
001 - ELECTRICAL SYSTEM		0.00

Employee ID: ...

Check Datetime Start:

Hours:

Comments:

[Assignment Page](#)

When you click on an existing event, the form populates with the event information.



Note: If needed, you can open the work order or the work order assignment pages as needed with the corresponding buttons on this pop-in.

2. Perform one of the following workflows:

Edit in the Appointment or Assignment Details pop-in:

- i. Choose or type the employee ID, start time, and hour duration. Comments are optional.
- ii. Click Save Appointment or Save Assignment to save.

Edit by clicking on the calendar:

- i. Click the calendar on the technician row you want to assign, and the time you want to assign it to.
- ii. Click Save Appointment or Save Assignment to save.

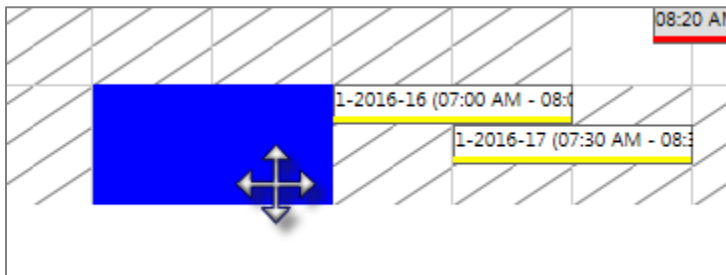
The edited appointment displays on the calendar.

Drag and drop Option

You can drag and drop events on the calendar to update appointment and assignment information. The drag-and-drop is an alternate, quicker way to populate the details form. You can assign appointments and assignments to different times in the day or different technicians all together. Drag and drop does not apply to non-work activities.

1. Just click and hold on an event shown in the calendar.
2. Drag the item to the time slot and technician you want to assign the item to.

A blue box will show the time needed time slot as you move, so you can easily see where the entire time slot will fit.



3. Release to drop the event when you have it where you want.



Using this method you are only able to schedule within 30 minute increments. However, you may use the appointment form to fine-tune the scheduled start time and hours.

The Appointment Details form is populated with the technician, start time and hours duration information.

Edit a Non-Work Activity

1. To edit a scheduled non-work activity, click on the non-work activity.

The Resource Hours Change pop-in displays where you may complete the fields as needed.

2. Click **Save** to save your changes.



At this time, in order to delete a non-work activity, you must go into the GUI as it is not possible to delete a non-work activity from Shop Activity.

Create Multiple Appointments

It is also possible to create multiple appointments for a given work order (e.g., scheduling before and after lunch, or scheduling two technicians to the same work order). To do this, click the **Copy Appointment** button (only enabled for existing appointments), click-and-drag (or type in the field information), and click the **Save Appointment** button.

Schedule Conflicts

Schedule conflicts are not validated. Supervisors may schedule appointments to the same technician, at the same time, on the same day, and the system will not show an error.

However, schedule conflicts are visually stacked so they are easy to see.

6 AM		7 AM		8 AM	
00	30	00	30	00	30
		1353752 (07:00 AM - 08:00)			
			ACLOC1-2014-1 (07:30 AM - 08:00)		

 If appointments overlap, the count of available hours will be incorrect while looking at an overview (it may even be a negative number). To avoid this, do not schedule overlapping appointments.

8. Approving Part Return Requests

The **Part Return Requests** button displays only if part request approvals have been enabled in system settings. The button is grayed out if there are no pending part return requests.

To approve part return requests:

1. Click **Part Return Requests** from the Action Items gadget in the Work Management portal.

The Pending Returns page displays with pending returns listed for the selected location.

Current Working Location: ACA - ASSET CENTRAL ADMINISTRATION

Pending Returns

Work Order: **ACA-2013-9** Process Requests

Task	Part	Qty	WAC	Reason
001-106 - ELECTRICAL - RELAY / RELAY SOCKET	EAR PLUGS -0 SAFETY; DISPOSABLE FOAM EARPLUGS	1.00	05	

Back

2. Click **Process Requests**.

The Process Returns page displays for the selected work order.

Work Order Info

Asset ID: **RAIL CAR-1: 1956 ACME NONE RAIL CAR ASSET TYPE**

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

Work Order ID: **ACA-2013-9** Job Status: **WORK FINISHED**

Job Type: **REPAIR** Projected Completion Date: **11/16/2018 07:59 AM**

Priority: **1 - EMERGENCY/IMMEDIATE**

Process Returns

Process

Task: 001-106 - ELECTRICAL - RELAY / RELAY SOCKET **WAC:** 05

Returned Part: EAR PLUGS -0: SAFETY; DISPOSABLE FOAM EARPLUGS **Qty:** 1.00

Issue Location: ACA - ASSET CENTRAL ADMINISTRATION **Employee:** AA - ASSET ADMINISTRATOR

Return Reason: **Date:** 02/01/2018 08:40 AM

Action: ☐ Approve ☐ Deny

Reason:



Note: If the part is serialized, the Installed Serial No and Removed Serial No fields display with the needed serial information.

3. Select the **Approve** or **Deny** radio button and enter a reason if needed.

Work Order Info			
Asset ID	RAIL CAR-1: 1956 ACME NONE RAIL CAR ASSET TYPE		
Repair Location	ACA - ASSET CENTRAL ADMINISTRATION		
Work Order ID	ACA-2013-9	Job Status	WORK FINISHED
Job Type	REPAIR	Projected Completion Date	11/16/2018 07:59 AM
Priority	1 - EMERGENCY/IMMEDIATE		

Process Returns			
Process	Task:	001-106 - ELECTRICAL - RELAY / RELAY SOCKET	WAC:
	Returned Part:	EAR PLUGS -0: SAFETY; DISPOSABLE FOAM EARPLUGS	Qty:
	Issue Location:	ACA - ASSET CENTRAL ADMINISTRATION	Employee:
	Return Reason:		Date:
	Action:	☐ Approve ☐ Deny	
	Reason:		

4. Click **Process**. Continue same steps until finished processing returns.

Process Returns

Task: 001-106 - ELECTRICAL - RELAY / RELAY SOCKET

Returned Part: EAR PLUGS -0: SAFETY; DISPOSABLE FOAM EARPLUGS

Issue Location: ACA - ASSET CENTRAL ADMINISTRATION

Return Reason:

Action: ☐ Approve ☐ Deny

Reason:

A message displays to indicate the approval or denial occurred.

*The number of pending part return requests is decreased by the number of approvals/denials you performed. The **Part Return Requests** button will be grayed out when there are no pending part return requests remaining.*

 To display the quantity returned, click the **History** button on the Post Work Order Parts pop-in. See the [Parts History Pop-in](#) section for more information.

Pending Parts Postings

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

Cancel Save History

9. Availability Filter Page

Click the **Manage Availability** button in the SLA – Asset Availability gadget of the Work Management portal to open the Availability Filter page.

Availability Summary		Filter			
0 Spares		Quick Filter			Set As Default Remove
0 Vehicles Required		SLA Category	%	...	Equip Status UNAVAILABLE ▾
0 Vehicles Assigned		Avail Location	1	...	Service Status
0 Vehicles Unavailable		Department	%	...	Equipment ID
		Save Quick Filter As		Save	Reset Filter
		Apply Filter			
Equipment Found - Available: 0, Unavailable: 11					
Sort ▾					
	Equipment ID	Work Order ID	Job Type	Repair Reason	WO Service S
	350 1996 GILLIG PHANTOM ==Meters: 1-6808 MILES; 2-0 NONE==1996 - 35 FT DIESEL BUS SLA Cat: ARTIC			Service Status: HFM	Dept: BT-PER BUS TRANS
	350	ACA-2014-36	REPAIR	J	HFM - HOLD FOR MAINTENAN
	350	ACA-2018-463	REPAIR	J	HFM - HOLD FOR MAINTENAN
	350	AWLOC1-2014-68	PM		HFM - HOLD FOR MAINTENAN
	350	BUS093-2014-12	REPAIR	J	HFM - HOLD FOR MAINTENAN
	350	MAIN-2015-2	REPAIR	J	HFM - HOLD FOR MAINTENAN
Back New Service Status Update Checked WOs					

The Availability Filter page has the following main sections:

- **Availability Summary:** The Availability Summary section displays equipment availability based on the Service Level Agreement (SLA) Category, the Available Location, and the Department. Each row displays with zeros until you create a filter as explained in the section below.
- **Filter:** The upper right portion of the page is where you set the filter fields to check for equipment availability. Refer to the [Create an Availability Filter](#) section below for information on creating filters to see equipment availability.
- **Equipment Found:** All six fields (SLA Category, Avail Location, Department, Equip Status, Service Status, and Equipment ID) provide the filtering information for the Equipment Found section at the bottom of the page.



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

- **Equipment Found:** The Equipment Found section is where equipment and corresponding work orders are listed as based on the six filter fields above. All six fields (SLA Category, Avail Location, Department, Equip Status, Service Status, and

Equipment ID) provide the filtering information for the Equipment Found section at the bottom of the page.



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

This list is helpful in determining which work orders are affecting your department's equipment service status. It is in this section that you may update service status and place equipment into service while waiting for work orders to be finished. Refer to the [Update Work Order Service Status](#) section below for information about how to change work order service status.

- The Equipment Found section title shows the count of Available and Unavailable equipment based on the filter. The equipment listed in the Equipment Found section can be sorted by selecting a sort field from the **Sort** drop-down box.

Equipment Found - Available: 0, Unavailable: 11				
	Equipment ID	Work Order ID	Job Type	Repair Reason
☐	350	1996 GILLIG PHANTOM==Meters: 1-6808 MILES; 2-0 NONE==1996 - 35 FT DIESEL BUS		Service Status: HFM
	SLA Cat: ARTIC			
☐	350	ACA-2014-36	REPAIR	J
☐	350	ACA-2018-463	REPAIR	J

- Each unit displays as a dark gray row with its associated work orders listed below. The table provides a checkbox to select equipment and their associated work orders, an **Unavailable** icon to indicate when equipment is unavailable, the Equipment ID, Work Order ID (links to the Work Order Center Enterprise Portal screen), Job Type, Repair Reason, and WO Service Status.

Create an Availability Filter

To create an Availability filter:

- In the Work Management portal, click **Manage Availability** in the SLA – Asset Availability gadget.

The Availability Filter page displays.

- Complete the filter fields as desired and click the **Apply Filter** button.

The Availability Summary and Equipment Found sections populate with corresponding data.

Availability Summary	Filter			
0 Spares	Quick Filter			Set As Default Remove
0 Vehicles Required	SLA Category	%	...	Equip Status UNAVAILABLE
0 Vehicles Assigned	Avail Location	1	...	Service Status
0 Vehicles Unavailable	Department	%	...	Equipment ID
	Save Quick Filter As		Save	Reset Filter
	Apply Filter			

3. Save the filter by entering a name in the **Save Quick Filter As** field and clicking **Save**.

A message displays to indicate the filter was saved and the filter name appears in the Quick Filter field.

4. To set the Quick Filter as default, select the desired Quick Filter from the Quick Filter drop-down box and click the **Set as Default** button.

Availability Summary	Filter			
0 Spares	Quick Filter			Set As Default Remove
0 Vehicles Required	SLA Category	%	...	Equip Status UNAVAILABLE
0 Vehicles Assigned	Avail Location	1	...	Service Status

5. To delete the filter and remove it from the **Quick Filter** drop-down list, select the desired filter and click the **Remove** button.

Availability Summary	Filter			
0 Spares	Quick Filter			Set As Default Remove
0 Vehicles Required	SLA Category	%	...	Equip Status UNAVAILABLE
0 Vehicles Assigned	Avail Location	1	...	Service Status

A dialog displays to confirm that you want to permanently remove the filter.

6. Click **OK**.

***Filter removed** displays at the top of the page to indicate successful removal.*

7. To reset the filter, click the **Reset Filter** button.

Update Work Order Service Status

Use the process below to update the work order service status and place the equipment into service.



Note: The Work Order ID is a link to the Work Order Center Enterprise Portal screen to view details to update the Work Order Detail page comments and notes before changing the service status.

To update the work order service status:

1. On the Availability Summary page, select the work orders to be updated by checking the boxes.
2. Enter the new service status or select from the choice-list.
3. Click the **Update Checked WOs** button.

	Equipment ID	Work Order ID	Job Type	Repair Reason	
☒	350 1996 GILLIG PHANTOM==Meters: 1-6808 MILES; 2-0 NONE==1996 - 35 FT DIESEL BUS - PERRY Avail Loc: 1 SLA Cat: ARTIC				Service Status: HFM
☐	350	ACA-2014-36	REPAIR	J	HFM - HOLD FC
☒	350	ACA-2018-463	REPAIR	J	HFM - HOLD FC
☒	350	AWLOC1-2014-68	PM		HFM - HOLD FC
☐	350	BUS093-2014-12	REPAIR	J	HFM - HOLD FC
☒	350	MAIN-2015-2	REPAIR	J	HFM - HOLD FC
☐	350	XANDER-LOC-2015-51	REPAIR	J	HFM - HOLD FC

Back New Service Status ... Update Checked WOs

A message displays to indicate the work orders are updated and the count and table update accordingly.

4. Click **Back** to return to the Work Management page.

10. Equipment Management Page

When you enter an equipment ID, license number, asset number, or VIN, in the Equipment Management section, the Equipment Management page displays. On this page, you can also use the search bar in the top-right of the page to search for new equipment or open the Asset Chooser.



If the asset is geo-locatable, its location will be displayed on a map.

The screenshot displays the Equipment Management page for asset GI-PH-2020-0001. The page is divided into several sections:

- Current and Pending Work:** Shows the asset ID (GI-PH-2020-0001: 2020 GILLIG PHANTOM1 BUS), station location (SB - SPOKANE BUS STORAGE), and repair location (SM - SPOKANE MAINTENANCE).
- Work Orders:** A table listing work orders with columns for Work Order ID, Assignments, Tasks, Status, Job Type, Title, Priority, Service Status, Repair Reason, and Delay. The table shows three work orders: SM-2023-118, SM-2023-76, and SM-2023-4.
- Pending Service Requests:** A table listing pending service requests with columns for Service Request ID, Task, Symptom, Priority, Comments, Entered When, and Entered By. The table shows three requests: GI-PH-2020-0001-2921, GI-PH-2020-0001-2919, and GI-PH-2020-0001-2918.
- Work Position:** A map showing the location of the asset. The map includes a search bar, a layers panel, and a zoom control. The layers panel shows the asset location (GI-PH-2020-0001) and a view of the map. The map shows the location of the asset in Spokane, WA, near Fairwood and Mead.

The Equipment Management page (Current and Pending Work) allows supervisors to view and access 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. Click the **Equipment ID** link to open the Asset Primary Screen (if the logged-in user has rights to view that screen). The View Asset zoom  icon opens 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 linear asset. Asset Viewer

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.

Current and Pending Work		GI-PH-2020-0001	
Asset ID	GI-PH-2020-0001: 2020 GILLIG PHANTOM1 BUS 		
Station Location	SB - SPOKANE BUS STORAGE	Repair Location	SM - SPOKANE MAINTENANCE

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

Asset Viewer



Equipment ID: **AUTO002**
2012 HONDA CIVIC AUTOMATION - DO NOT MODIFY
MILES

1840

Manage Work
Work History

Basic Info

Codes
Scheduled Svcs
Warranty
Attributes
Bill of Materials
Parts Used
Files
Comments/Notes
Relationships

Basic Info

Model Year: 2012
Manufacturer: HONDA
Model: CIVIC
Equipment Type: EQTYPE-01
Description: AUTOMATION - DO NOT MODIFY
Color: GRAY
Serial Number:
Asset Number:
Asset Category: AUTO-SEDAN-01 - AUTOMATION ASSET CATEGORY
Asset Type: ASSET

Assignment Info

Department: AUTOMATION - AUTOMATION - DO NOT MODIFY
Operator:
Work Phone:
Email Address:
Department: AC-DEPT - AC DEPARTMENT
License Expires: 04/10/2024

Meter Info

Meter Types Class: SEDAN-01
Meter 1: 1840 MILES
Meter 1 Life Total: 1840 MILES

Locations

Assigned PM: AUTO-RPR2 - AUTOMATION - REPAIR - ALT
Assigned Repair: AUTO-RPR2 - AUTOMATION - REPAIR - ALT
Assigned Mobile:
Station:
Stored:
Current:
Parking Stall:

Acquisition

Delivery Date:
In Service Date:
Months Remaining: 0
Original Cost:
Capitalized Value:
Original Cost + Capitalized Value:
Estimated Replacement Month: 0
Estimated Replacement Year: 0

Work Orders

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: 6					
				Expand All	Collapse All
	MAIN-2017-206	Status: OPEN	Job Type: REPAIR	Priority: 3 - ROUTINE	
	Assignment	Service Status:	Repair Reason: B - BREAKDOWN	Delay:	
	Task	WAC			
	001 - ELECTRICAL SYSTEM	02			
	MAIN-2017-204	Status: OPEN	Job Type: REPAIR	Priority: 3 - ROUTINE	
	Assignment	Service Status:	Repair Reason: B - BREAKDOWN	Delay:	
	MAIN-2017-201	Status: OPEN	Job Type: REPAIR	Priority: 3 - ROUTINE	

Pending Service Requests

Pending Service Requests: 1					
	Task	Symptom	Entered When	Entered By	Priority
		RPLC ANTIFREEZE - COOLING SYSTEM > OVERHEATING > RPLC ANTIFREEZE	09/10/2015 10:29 AM		3
No Comment					

The Pending Service Requests section lists the service requests (by Priority rank) pending for the piece of equipment. Click the **Zoom** button to open the Service Request/Defect.

Component Assignment History

This section will only display for components. It shows the assignment history for the current component including all of the equipment units it has been assigned to as well as other supporting data about those assignments.

Component Assignment History					
					Search...
Equipment ID	Equipment Description	Position	Position Description	Assignment Start	Assignment End
611	2000 BRED A CQ312==Meters: 1-694790 MILES; 2-0 NONE==2000 750 VOLT AC			28/07/2011	16/08/2011
672	2002 BRED A CQ312==Meters: 1-506892 MILES; 2-0 NONE==2000 750 VOLT AC			03/02/2011	04/07/2011
632	2001 BRED A CQ312==Meters: 1-772207 MILES; 2-0 NONE==2000 750 VOLT AC			15/04/2009	08/12/2009
642	2002 BRED A CQ312==Meters: 1-772668 MILES; 2-0 NONE==2000 750 VOLT AC			10/07/2007	23/10/2007
654	2002 BRED A CQ312==Meters: 1-682446 MILES; 2-0 NONE==2000 750 VOLT AC			01/10/2006	03/02/2011

New Service Request Button

This button allows you to create a service request that is not related to a work order.

The screenshot shows the top navigation bar of the Equipment Management page. It includes a dropdown menu for 'New Work Order Location' set to '1 - OPS'. Below this are five buttons: 'Back', 'Repair History', 'New Service Request' (which is circled in red), 'New PM WO', and 'New Repair WO'.

To create a new service request for the asset:

1. From the Equipment Management page (Current and Pending Work), click **New Service Request** to open the Service Request/Defect page.

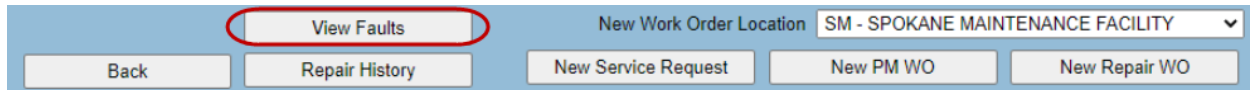
The screenshot displays the 'Service Request - GI-PH-2020-0001-2921 (1 of 1932)' page. At the top, there's a header with a bus image and a table of key information: Asset ID (GI-PH-2020-0001: 2020 GILLIG PHANTOM1 BUS), Station Location (SB - SPOKANE BUS STORAGE), Service Request ID (GI-PH-2020-0001-2921), Repair Location (SM - SPOKANE MAINTENANCE), Incident ID (0), Symptom (SEIZING UP - BREAK DOES NOT RELEASE FULLY SOMETIMES AFTER SUDDEN STOPS), SR Contact Name (SYSADMIN), and SR Contact Phone ((111) 222 - 3333). Below this is a 'Basic Information' section with fields for Asset ID, Location, Jurisdiction, Condition Rating, Task ID, Priority ID, and Estimated Hours. To the right is a 'Source' section with fields for Created By, Created On, Reporting Source, Operator ID, Name, Phone Number, and Email Address. Further down are sections for 'Complaint / Cause / Correction', 'Tasks', 'Faults' (with a message 'No faults exist for this service request.'), 'Notes', and 'Comments'. At the bottom, there are navigation buttons: 'Previous', 'Next', 'Manage Service Request', and 'Assign to Work Order'.

The Service Request/Defect header displays Asset ID, Life Meter 1, Repair Location, Service Request ID, Incident ID, and SR Symptom. Basic Information includes: Asset ID, Location, Reporting Source, Operator ID, Name, Phone Number, Email Address, Symptom, Fail/Cause Code, WAC, Correction Performed, Condition rating, Task ID, Priority ID and Estimated Hours. Notes, comments, and files may be added.

2. Do one of the following:
 - Complete the fields and click **Save** to save the service request.
 - Click **Reject** to reject the service request.
 - Click **New Work Order** to open the New Work Order page with the existing service request listed.

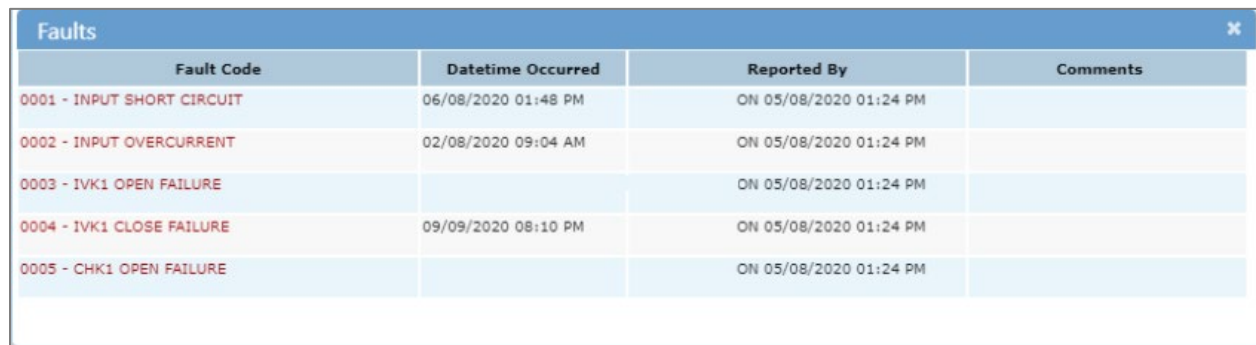
If you saved the service request, the service request shows on the Equipment Management page in the Pending Service Requests section.

View Faults



The navigation bar contains several buttons: 'Back', 'Repair History', 'New Service Request', 'New PM WO', and 'New Repair WO'. The 'View Faults' button is highlighted with a red circle. To the right of the buttons is a dropdown menu for 'New Work Order Location' set to 'SM - SPOKANE MAINTENANCE FACILITY'.

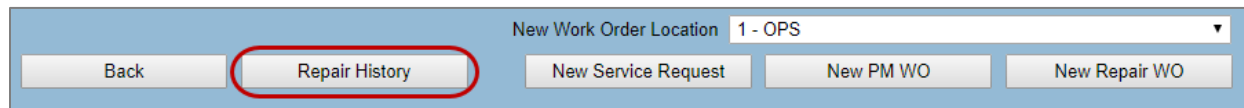
Click View Faults to open the Fault Summary pop-in.



The 'Faults' pop-in window displays a table with the following data:

Fault Code	Datetime Occurred	Reported By	Comments
0001 - INPUT SHORT CIRCUIT	06/08/2020 01:48 PM	ON 05/08/2020 01:24 PM	
0002 - INPUT OVERCURRENT	02/08/2020 09:04 AM	ON 05/08/2020 01:24 PM	
0003 - IVK1 OPEN FAILURE		ON 05/08/2020 01:24 PM	
0004 - IVK1 CLOSE FAILURE	09/09/2020 08:10 PM	ON 05/08/2020 01:24 PM	
0005 - CHK1 OPEN FAILURE		ON 05/08/2020 01:24 PM	

Repair History Button



The navigation bar contains several buttons: 'Back', 'Repair History', 'New Service Request', 'New PM WO', and 'New Repair WO'. The 'Repair History' button is highlighted with a red circle. To the right of the buttons is a dropdown menu for 'New Work Order Location' set to '1 - OPS'.

Click **Repair History** to open the Work Order History page.

Depending on settings, the default number of months to report for Work Order history may not initially display results for the selected equipment on the Equipment History page as indicated in the screenshot below.

Work Order History			
Asset ID	PC-001: 2001 NEW FLYER C40LF POLICE CRUISER 001 		
Asset Number	PC-001	Station Location	CENTRAL
Repair Location	CENTRAL	Operator Name	PO-001 - POLICE OFFICER 001
Current Filter			
☒ Months of History	3	Task ID	...
☐ Count of Work Orders	50		
☐ All			
		Apply Filter	Reset Filter
No work order history for PC-001 within the last 3 months.			
Back Show All History Printer Friendly			

In the Current Filter section, modify the filter to display different months of history, number of work orders, or task IDs. Click **Apply Filter** or **Reset Filter** button to apply or reset the filter.



Note: Set the **Months of History** and **Count of Work Orders** fields to **0**, or check the **All** button, to display all months of history and work orders. Similarly, set the **Task ID** field to the wildcard % to see all task IDs.

Here are some quick button tips for this page:

- 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 **Show All History** to display that asset ID's work order history for all months.
- If configured, click **Printer Friendly** to print the asset ID's History.



Note: 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. Refer to 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). Refer to the [New Repair Work Orders](#) section for more information about this page.

11. Work Order Management Page

From the Work Management portal home page, click a work order count button in the Work Summary gadget. This page lists work orders, production run work orders, or service requests. For more detail about filtering the list, refer to the [Current Filter](#) section. This page provides supervisors with an overview of the Work Orders in their shops according to location and department access.

Current Working Location
Go to Work Order

Current Location: ACA - ASSET CENTRAL ADMINISTRATION
View Calendar
Year: 2019 No.
Go

Work Orders: 165
Expand All
Collapse All

Tasks	Notifications	Jobbed on	WO Number	View / Edit Assignments	Assigned	Asset ID	Service Status	Type	PM Service	Maint. Class	R
+			474	Assignments	AA - ASSET ADMINISTRATOR	0123 - 1753 NEW FLYER C40LF==Meters: 1-0 MILES; 2-0 NONE==2001 NEW FLYER COMPRESSED NATURAL GAS 40		REPAIR			C
+			478	Assignments		0123 - 1753 NEW FLYER C40LF==Meters: 1-0 MILES; 2-0 NONE==2001 NEW FLYER COMPRESSED NATURAL GAS 40		REPAIR			B
+			915	Assignments		14202 - 2002 FORD F150==Meters: 1-73460 MILES; 2-0 NONE==4.2L P/U 4X2 REGULAR CAB		PM	NR-3000 MILE		Q
+			914	Assignments		14203 - 2002 FORD F150==Meters: 1-87885 MILES; 2-0		PM	NR-3000 MILE		Q

Current Filter:
No filter defined.
Record Type: WORK ORDER
Asset Type:
Assignment Status: ALL ASSIGNED UNASSIGNED
Work Order Status: OPEN PENDING PLANNING

Back
New Work Order
Work Order Center
Service Request Screen
Review and Close WOs

Current Working Location

This section lets you choose (from a drop-down selection box) which location's work orders to view. The location codes available in this drop-down selection box are controlled by your employee record Supported Locations.

View Calendar Button

The **View Calendar** button takes you to the **Shop Calendar** where supervisors may schedule technicians to work on equipment. Refer to the [Shop Calendar](#) section for more information about using the shop calendar.

Go to Work Order

This area allows supervisors to go directly to a specified work order when the year and number are known.



This section searches for OPEN and PENDING work orders only.

Enter the year and number and click the **Go** button to display the work order.

Work Orders

The Work Orders section lists all the work orders matching the current filter criteria at the chosen location.

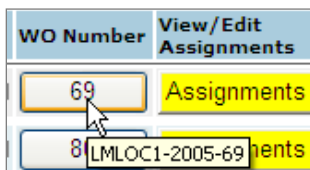
Current Working Location														Go to Work Order	
Current Location: 1 - OPS View Calendar														Year: 2016 No. Go	
Work Orders: 12 Expand All Collapse All															
Tasks	Notifications	Jobbed on	WO Number	View / Edit Assignments	Asset ID	Service Status	Type	PM Service	Maint. Class	Repair Reason	Delay	Vendor	Date Unit In	Date Due	Sc
☐			5	Assignments	SRV-CAR1 - BLAZIN FIRE		REPAIR		SE-LH-BA-55E-10	B			09/29/2015 09:48 AM	10/01/2015 09:48 AM	
			3	Assignments	0000024 - SERIES 90 DETROIT DIESEL GAS ENGINE	TFG	REPAIR		DD-S50-CNG-EN	J			03/09/2016 01:14 PM	03/10/2016 01:14 PM	
☐			5	Assignments	SRVTEST02 - SARAH PARKING LOT		REPAIR		AB	J			03/23/2016 08:38 AM	03/24/2016 08:38 AM	
SYD: 2200 +10 ==> 2800 +90															
☐			6	Assignments	SRV-PEDBRIDGE - CN-415 ART CENTER PEDESTRIAN BRIDGE		REPAIR		TRK-BRG-PED	A			03/23/2016 09:01 AM	03/28/2016 09:01 AM	
N: 14600 +52															
☐			16	Assignments	SRV-CAR1 - BLAZIN FIRE		REPAIR		SE-LH-BA-55E-10	J			05/19/2016 09:54 AM	05/21/2016 09:54 AM	06 07
☐			17	Assignments	SRV-CAR1 - BLAZIN FIRE		REPAIR		SE-LH-BA-55E-10	AB02			05/19/2016 10:11 AM	05/21/2016 10:11 AM	06 10
☐			24	Assignments	SRV-CAR1 - BLAZIN FIRE	HPM	REPAIR		SE-LH-BA-55E-10	A			06/24/2016 11:40 AM	06/26/2016 11:40 AM	



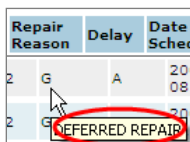
If you have multiple Work Orders, you may use the scroll bar on the right of this section to view the entire list.



Tip: Hover the cursor over a WO Number button to view the actual Work Order ID number:



Tip: Hover the cursor over certain code fields (for example, repair reason) to view the description of that code:



The Tasks Column

A plus, +, indicates the work order has tasks. Click on the + to expand the view to see the tasks corresponding to the work order.

Work Orders: 12 Expand All Collapse All								
Tasks	Notifications	Jobbed on	WO Number	View / Edit Assignments	Asset ID	Service Status	Type	PM Service
	 W		5	Assignments	SRV-CAR1 - BLAZIN FIRE		REPAIR	
			3	Assignments	0000024 - SERIES 50 DETROIT DIESEL GAS ENGINE	TFG	REPAIR	
			5	Assignments	SRVTEST02 - SARAH PARKING LOT		REPAIR	
SYD: 2200 +10 ==> 2800 +90								
		Task ID	Task Description	Est Hrs	WAC			
		A	PM SERVICE A	15.00				
		AC1	BASIC TASKS	0.00	05			
		AC1-001	BASIC TASKS - CLEANING	0.00				
		CNINSPECT001	INSPECTION 001	25.00				
			6	Assignments	SRV-PEDBRIDGE - CN-415 ART CENTER PEDESTRIAN BRIDGE		REPAIR	

Click the + to Expand the View to Display the Work Order's Tasks



The **Oil Can** icon  displays next to PM or Inspection Tasks and appears blue or yellow depending on task completion (blue means the task is done and yellow means the task is incomplete). Clicking on this icon will take you to the PM Checklist page. Refer to the [PM Checklist Page](#) for further information about this page.



A red alert triangle will display for a PM Checklist exception based item that has failed.

Notifications Column

Work Orders: 81				
Tasks	Notifications ▼	Jobbed on	WO Number	View / Edit Assignments
			37	Assignments
			43	Assignments
CNSEG001: CNMARKER003 +25				

Clicking on the **Notifications** column title sorts the list to display all work orders with parts ready and pending parts requests. Icons are defined in the table below.

Icon Name	Icon	Description
Parts Ready		The parts ready icon displays when the Parts Room Clerk sets the flag to Notify or Notify All Pending (Parts Activity Requests screen).
Pending Parts Requests		The pending parts requests icon displays when a pending part request exists for the work order. Both icons hyperlink to the Parts History pop-in. Refer to the Parts History Pop-in section below for more information.
Pending Commercial Work		The pending commercial work icon displays when pending commercial work exists for the work order. This icon links to the Commercial Work History pop-in which provides the commercial purchase order line items on the work order. 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.
Warranty		This WO or task has work being done under a warranty.

Jobbed on Column

The Jobbed on column shows whether a technician is jobbed onto a particular work order.

Work Order Number Column (with WO Button)



Click the **Work Order Number** button to go to the Work Order Main page or the Work Order Details page. See the [Work Order Main Page](#) or the [Work Order Details Page](#) section below for more information about this page.



Note: Depending on your settings, the first time you click on the **Work Order Number** button (in a given day) you may be automatically redirected to the Work Order History page for the equipment ID on that work order. See the [Work Order History Page](#) section below for more information about this page. This system option is offered to ensure that employees review work history for every work order they encounter.

View/Edit Assignments Column (with Assignments Button)

The **Assignments** button allows you to view/edit assignments and assign employees or vendors to tasks.

When the **Assignments** button is highlighted in yellow, it indicates that the task is awaiting assignment. Click on the highlighted **Assignments** button to assign an employee or vendor. If the button is not highlighted, the task has already been assigned to at least one employee or vendor. Click on an **Assignments** button that is not highlighted to view current assignments.

Whenever the **Assignments** button is clicked, it takes you to the Work Order Assignment Detail page. See the [Work Assignment Detail Page](#) section below for more information regarding this page.

Additional Work Order Information

Additional work order information displayed in the Work Order section can be seen by scrolling to the right of the section and includes: Asset ID, Service Status, Type, PM Service, Maint. Class, Repair Reason, Delay, Vendor, Date Unit In, Date Due, Date Scheduled, Project Completion Date, Hours Completed, Tasks Completed, Shift, Bay, Priority, Est Hours, Days Open/Left, and Approved?.

Created By:

This column allows you to view the employee who created the work order.

Project Completion Date:

Using work assignment data for a work order, we can estimate a completion date and time.



Note: This is not a stored data field. This is a calculated, display-only field to help users plan.

- If a user adds estimated hours on the work order tasks, schedules the work assignments, and assigns employees to the work order or its tasks, then the system calculates when this work order might be completed. Note that this works by looking at assigned employee's schedules and plotting out the estimated hours over their schedules for each day until the estimated hours are fulfilled. The system cannot anticipate delays, hence it is just an estimate.
 - In the case of the Work Order Management table, no text is shown (NOT ASSIGNED, INSUFFICIENT DATA) if the system cannot do calculations.
 - In the case of Work Order headers, a text status may be shown if there is something missing to do calculations. NOT ASSIGNED means there is no employees, INSUFFICIENT DATA means there is something missing such as

estimates or scheduled dates. If this is all available but the estimated hours is 0, it will project that this work order can be completed now and will show the current date and time.

Hours Completed

This is a display only, calculated field based on posted hours across all tasks on the work order, and estimated hours across all tasks to finish work order.

In the case of the Work Order Management table, the percentage is represented visually as a bar that will fill up and change color depending on the ratio:

- The progress bar will normally show orange.
- The progress bar will show red if the posted hours is over the estimated hours.
- When you hover over the progress bar, the tooltip will show the exact numbers in the ratio, and the underlying percentage.
- The ratio is also shown with the bar (total posted hours/total estimated hours).
- If there is no estimate, than only the total posted hours will show with no progress bar. If there are no tasks, this field will be empty.

Sorting the **Hours Completed** column sorts to show the highest percentage values followed by posted hours.

In the case of Work Order Headers (on the Work Order Main area when you open a work order), the headers show the X/Y (total posted hours/total estimated hours) value. If there is no estimate, than only the total posted hours will be shown. If there are no tasks for the work order, this field is not shown.



Note: Each task also has a **Remaining Hours** field. This field shows remaining hours left on a task by taking the estimated hours on a task and subtracting any labor posted on the task. If more labor is posted than estimated, it will show a negative value to indicate this task is going over the estimate. A completed task shows 0 hours unless the hours posted on it went over estimate.

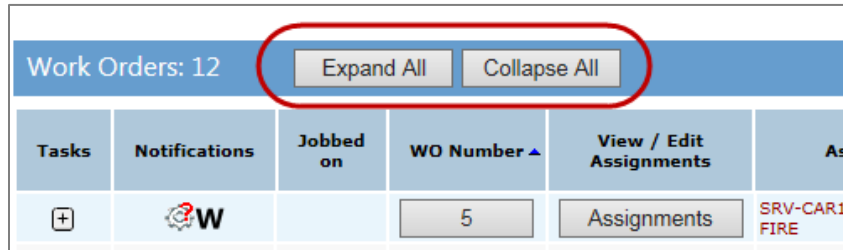
Tasks Completed

This is a display only, calculated field based on number of completed tasks on a work order and the number of tasks on a work order.

In the case of Work Order Management table, the field shows the entire ratio of completed tasks to total tasks. The percentage is not shown as it has no value since tasks can widely vary in the level of effort it takes to complete each one (for example, comparing an oil change to an engine rebuild). If there are no tasks, this field is empty.

In the case of Work Order Headers, it will show the X/Y (50.00%) value. If there are no tasks for the work order, this is empty.

Expand and Collapse All Buttons



- Click **Expand All** to expand the view to see all the tasks associated with the Work Orders.
- Click **Collapse All** to collapse the view to list only the Work Orders.

Current Filter

Use this area to select various criteria on which to filter. Select a filter to filter specific work orders or service requests, or use the fields to choose other options to display such as record types, asset types, etc. This area has different filter options according to the record type selected.

 A screenshot of the 'Current Filter' section in the application. It features a blue header bar with a dropdown menu labeled 'Current Filter:'. Below the header, the text 'No filter defined.' is displayed. To the left are two buttons: 'Define Filter' and 'Clear Filter'. To the right are several filter options: 'Record Type' with a dropdown menu showing 'WORK ORDER'; 'Asset Type' with a dropdown menu; 'Assignment Status' with radio buttons for 'ALL', 'ASSIGNED', and 'UNASSIGNED'; 'Work Order Status' with radio buttons for 'OPEN', 'PENDING', and 'PLANNING'; and 'Approval Status' with radio buttons for 'ALL', 'APPROVED', and 'UNAPPROVED'.

Current Filter: This field allows you to define multiple filters for work order and service request viewing. The current filter is displayed in the **Current Filter** field. You may select a previously saved filter from the drop-down list to change the filter.

Filter the page with one of the following methods:

- Select a filter from the Current Filter drop-down list. Refer to the [Define Filter Page](#) section below for instructions on how to define a filter.

*The **Clear Filter** button clears the filter.*

- Select an option from the **Record Type** drop-down list.
 - Available Record Types include: Work Order, Production Run WO, and Service Request.

- Select an option from the **Asset Type** drop-down list.
 - Available Asset Types include: All Asset Types, Asset, Component, Linear, Rail, Stationary, and Inventory Rebuild.
- Select the radio buttons to filter for a specific assignment and work order status.

Record Type	WORK ORDER ▼
Asset Type	▼
Assignment Status	☒ ALL ☐ ASSIGNED ☐ UNASSIGNED
Work Order Status	☒ OPEN ☐ PENDING ☐ PLANNING
Approval Status	☒ ALL ☐ APPROVED ☐ UNAPPROVED

Work order options

Record Type	PRODUCTION RUN WO ▼
Asset Type	▼
Assignment Status	☒ ALL ☐ ASSIGNED ☐ UNASSIGNED
Production Stage	☒ MY STAGE ☐ COMING SOON
Approval Status	☒ ALL ☐ APPROVED ☐ UNAPPROVED

Production run work order options

Record Type	SERVICE REQUEST ▼
Asset Type	▼
Show SRs with	☒ ALL ☐ TASKS ☐ SYMPTOMS

Service request options

Define Filter Page

To define a filter.

1. On the Work Order Management page, click **Define Filter**.

The Define Filter page displays.

 When Asset Type=INVENTORY REBUILD, the Asset Filters fields displayed include Rebuild Part No. and Part Suffix.

2. Select the record type.
3. Complete the desired fields. These fields vary on the record type selected.
4. **Optional:**
 - Enter a name in the **Save Quick Filter as** field to be able to use this filter in the future.
5. Click one of the following:
 - **Save:** Saves the filter.
 - **Reset Filters:** clears all the selected values and begins from a clean page.
 - **Cancel:** Cancels your selections and returns to the Main Work Order Management page.
 - **Apply Filter:** Saves your selections and returns to the Main Work Order Management page.

 The Quick Filter drop-down list at the top of the page is now populated with the name you saved. You may choose to select the quick filter as the default by clicking the **Set as Default** button or remove the filter from your quick filter list by clicking the **Remove** button. A message also appears at the bottom of the page to indicate that the filter was saved successfully.

The Work Order Management Page displays record types based on the filter you create or select.

Record Type Drop-down

Use the **Record Type** drop-down field to choose which view to see, or use the filtering as described below. View options include work orders, production run work orders, or service requests.

- **Work order fields:** Tasks, Notifications, Jobbed on, WO Number, View/Edit Assignments, Asset ID, Service Status, Type, PM Service, Maint. Class, Repair Reason, Title, Delay, Vendor, Date Unit In, Date Due, Date Opened, Date Scheduled, Projected Completion Date, Hours Completed, Tasks Completed, Shift, Bay, Priority, Est Hours, Days Open/Left, Approved?
- **Production run work order fields:** Tasks, Notifications, Jobbed on, WO Number, View/Edit Assignments, Asset ID, Production Run ID, Stage, Service Status, Type, PM Service, Maint. Class, Repair Reason, Title, Delay, Vendor, Date Unit In, Date Due, Date Opened, Date Scheduled, Projected Completion Date, Hours Completed, Tasks Completed, Shift, Bay, Priority, Est Hours, Days Open/Left, Approved?
- **Service request fields:** New WO, Edit, Asset, ID, Service Status, Task, Symptom, Date Created, Created by, Priority, Reporting Service, Date required, Jurisdiction. When Service Request is selected as the filtered Record Type, the Service Request Management page is displayed. This page lists equipment units with unassigned service requests.
 - The **New Work Order** button  opens the New Work Order page to create a work order for the service request.
 -  The New Work Order page displays with the selected service request checked and at the top of the service request list. If the **Default service requests as unassigned** setting is unchecked on the Locations – Primary Information screen, Work Orders – Service Requests tab, all the pending service requests on the New Work Order page are checked (for all asset types except for linear, where only the top-most one will be auto-checked). If the setting is checked, only the top pending service request on the New Work Order page is checked.
 - The **Zoom**  button opens the Service Request/Defects page.
 -  Hover over the **Equipment ID** to show the description of the equipment. The Equipment ID link takes you to the Equipment Management page for the piece of equipment.

Bottom Toolbar

Current Filter:

No filter defined.

Define Filter Clear Filter

Record Type WORK ORDER

Asset Type

Assignment Status ☒ ALL ☐ ASSIGNED ☐ UNASSIGNED

Work Order Status ☒ OPEN ☐ PENDING ☐ PLANNING

Back New Work Order Work Order Center Service Request Screen Review and Close WOs

New Work Order Button

To create a new work order, click the **New Work Order** button. This opens the New Work Order page. See the [New Work Orders](#) section for details on creating a new work order.

Work Order Center Button

Click the **Work Order Center** button to open the Enterprise Work Order Center. See the [Work Order Center](#) section below for information about this button.



Note: You must have Enterprise Portal and access rights to be able to use this button.

Service Request Screen Button

Click the **Service Request Screen** button to open the FleetFocus Service Request/Defects screen.



Note: You must have Enterprise Portal and access rights to be able to use this button.

Review and Close WOs Button

Click the **Review and Close WOs** button to open the Work Order Review/Closing page. This is where supervisors may review and close work orders. See the [Work Order Review/Closing Page](#) section below for more information about this page.

12. Work History Page

Click the **Equipment History** button in the Actions section of the Work Order Main page or the Work Order Details page to be taken to the Work History page.

Work History

Asset ID

LOC 8 NL: 2012 QA-01 QA-01-01 QA-FLEET-001 DESCRIPTION

Station Location

QA-FULL-01 - QA FULL SRV LOCATION

Repair Location

QA-FULL-01 - QA FULL SRV LOCATION

Numeric 1

6

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

History for the last 4 months

Work Order ID	WO Date	WO Closed Date	Task ID	Task Date	Life Meter 1	Meter 1 since prev PM
QA-FULL-01-2024-42	01/16/2024 14:18		QA - QA REPAIR GROUP		0	
QA-FULL-01-2024-41	01/16/2024 14:16	01/16/2024 14:17	QA - QA REPAIR GROUP		0	
QA-FULL-01-2024-23	01/16/2024 12:41		QA - QA REPAIR GROUP		0	
QA-FULL-01-2024-22	01/16/2024 12:39	01/16/2024 12:40	QA - QA REPAIR GROUP		0	

Back

Show All History

Printer Friendly

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



Note: Work history only shows if there were charges to a task on the work order which would include commercial work, parts or labor.



Note: A filter option is available to include transactions for tasks that do not have a Work Order ID associated with the specified transaction.

To view work history:

- Set a range of history or filter the task using one of the following methods in the **Current Filter** section. After specifying details, click **Apply Filter**.
 - Set the range of months to display the history: Enter a number in the **Months of History to Display** field (0 = All).
 - Set the number of work orders to display the history: Enter a number in the **Count of Tasks** field (0 = All).

- Display a list of all the work order history for that piece of equipment: Click the **All** button. If checked this will automatically check **Show Tasks with no Work Order**.
- Filter the task: Enter a Task Code in the **Task ID** field.
- 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.
- If desired, check the **Show Tasks with no Work Order** option to include transactions that are direct Commercial, Labor, and Part postings without an associated Work Order ID. Both new and historical transactions will be included. This option defaults as checked if the **Shop Activity setting for Default for showing tasks with no work order in equipment history** is checked.

After entering the data, a populated Work History table displays.

2. Review the Work History table which contains the following columns:
 - Work Order ID – This column can be hidden by right-clicking on the table header and making configuration changes. If hidden, the Task ID must be displayed.
 - WO Date – Date Work Order was created.
 - WO Closed Date – Date Work Order was closed.
 - Task ID – This column can be hidden by right-clicking on the table header and making configuration changes. If hidden, the Work Order ID must be displayed.
 - Task Date – Transaction date for the Task when a transaction for a task does not have an associated Work Order ID.
 - Meter 1 or 2 since previous PM – calculated meter difference for each meter between the PM task that was performed in the current row and the last performed PM task.
 - Meter 1 since this PM – Meter difference between when the PM was performed and the current meter value of the asset.
 - WAC – Work Accomplished Code
 - Employee – Employee assigned to the Work Order
 - Repair Reason – Specifies the reasons for the repair on the specified work order.
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.

- Click the **View Faults** button to go to the Fault Summary page. This page allows you to view faults that have been created in the system relevant to the current location as well as the number of times the fault has occurred. The faults can be filtered to reduce the fault instances for certain types of assets, a specific asset, or a date range.

Fault Summary

Current Location: GEN-MAINT - GENERAL MAINTENANCE New Fault

Datetime Reported	Fault Code	Asset ID	Datetime Occurred	Num Occurrences	Service Request ID	Service Request Status
22/07/2020 15:14	9999 - MAX LENGTH FAULT CODE MAX LENGTH FAULT CODE MAX LE	GI-PH-2020-0001 - 2020 GILLIG PHANTOM==Meters: 1-0 MILES; 2-0 NONE==2020 GILLIG PHANTOM		0	GI-PH-2020-0001-488	OPEN
22/07/2020 15:14	0004 - 2VK1 CLOSE FAILURE	GI-PH-2020-0001 - 2020 GILLIG PHANTOM==Meters: 1-0 MILES; 2-0 NONE==2020 GILLIG PHANTOM		0	GI-PH-2020-0001-488	OPEN
22/07/2020 15:14	0005 - CHK1 OPEN FAILURE	GI-PH-2020-0001 - 2020 GILLIG PHANTOM==Meters: 1-0 MILES; 2-0 NONE==2020 GILLIG PHANTOM		0	GI-PH-2020-0001-488	OPEN
22/07/2020 15:14	0011 - OVER VOLTAGE OF FC2	GI-PH-2020-0001 - 2020 GILLIG PHANTOM==Meters: 1-0 MILES; 2-0 NONE==2020 GILLIG PHANTOM		0	GI-PH-2020-0001-488	OPEN
22/07/2020 14:00	0001 - INPUT SHORT CIRCUIT	GI-PH-2020-0001 - 2020 GILLIG PHANTOM==Meters: 1-0 MILES; 2-0 NONE==2020 GILLIG PHANTOM		0	GI-PH-2020-0001-568	OPEN
21/07/2020 08:25	0001 - INPUT SHORT CIRCUIT	GI-PH-2020-0001 - 2020 GILLIG PHANTOM==Meters: 1-0 MILES; 2-0 NONE==2020 GILLIG PHANTOM		0	GI-PH-2020-0001-593	PENDING
21/07/2020 08:25	0002 - INPUT OVERCURRENT	GI-PH-2020-0001 - 2020 GILLIG PHANTOM==Meters: 1-0 MILES; 2-0 NONE==2020 GILLIG PHANTOM		0	GI-PH-2020-0001-593	PENDING
20/07/2020 17:13	0001 - INPUT SHORT CIRCUIT	GI-PH-2020-0001 - 2020 GILLIG PHANTOM==Meters: 1-0 MILES; 2-0 NONE==2020 GILLIG PHANTOM		0	GI-PH-2020-0001-500	OPEN
20/07/2020 17:13	0002 - INPUT OVERCURRENT	GI-PH-2020-0001 - 2020 GILLIG PHANTOM==Meters: 1-0 MILES; 2-0 NONE==2020 GILLIG PHANTOM		0	GI-PH-2020-0001-500	OPEN

Filter

Asset ID: ... Datetime From: ...

Equipment Type: ... Datetime To: ...

Fault Code ID: ... Acknowledged:

Apply Filter

Back

The Fault Summary page displays.

- Click the **Printer Friendly** button to obtain the Work Order History report. This button is linked to the report that was set up during configuration.



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

13. Work Order Main Page

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

Submit

Asset ID	GI-PH-2020-0002: 2020 GILLIG PHANTOM BUS		
Station Location	SB - SPOKANE BUS STORAGE	Repair Location	SM - SPOKANE MAINTENANCE
Work Order ID	SM-2022-196	Job Status	OPEN
Job Type	REPAIR	WO Meter 1	0 MILES
Projected Completion Date	2023-05-23 02:57 PM	Parent Multi-asset WO ID	SM-2022-185
Priority	1 - HIGH		

Service Requests: 2

	Date Reported	Symptom or Task	Problem Description	ID	Status
	2022-08-10 01:56 PM	ACAT-BUS-SYMP1		GI-PH-2020-0002-925	OPEN
	2022-08-22 03:28 PM	BREAKS - TASK DEFAULT COMPLAINT COMMENT	3C TASK GENERATED	GI-PH-2020-0002-938	OPEN

Tasks: 1

	Task Code	Description	WAC	Est Hours	Repair Reason
	001-000	CHANGE LIGHT BULBS		0.50 BKDW	

Manage Work Order

Assignments

The Work Order Details section displays general information regarding the work order and related equipment ID.

Configuration Details

Depending on your configuration, the Work Order Main page display may slightly differ from the sample screenshot. For example, an **Asset ID** can be a link to the Asset Primary Information screen and the **Work Order ID** would link 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 and whether data is available. For example:

- The header can display **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.

- **Configuration Compliance** information displays if your system is licensed for Asset Configuration Management.
- Also, not all fields display if there is no data. If there are no estimated hours for the tasks, the label is hidden.

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

Depending on the Work Order Location Setting configuration, the Work Order Main page also differs slightly based on your labor entry method (Real-time, Post, or Both) and whether your organization requires service requests for tasks or not. The main differences are as follows:

- The **Postings** button displays if your labor entry method is set to Post or BOTH
- The **New Task** button displays when Service Requests are NOT required for tasks. The **New Task** button is hidden when Service Requests are required for tasks. Also, the Service Request area will fill the entire Task area when no related tasks exist.

The [Work Order Main Page for Assets](#) differs slightly from the [Work Order Main Page for Part Rebuilds](#).

Work Order Main Page for Assets

Following is a sample Work Order Main page for assets.

Work Order Main						
Asset ID	14204: 2002 FORD F150 4.2L P/U 4X2 REGULAR CAB			Tech ID	Tech Name	Task
Asset Number	H	Station Location	BUS030 - NON-REVENUE MAINTENANCE	No employees currently working		
License Number		Repair Location	BUS030 - NON-REVENUE MAINTENANCE			
Work Order ID	-2018-916	Job Status	OPEN			
Job Type	PM	PM Service	NR-3000 MILE - NON REVENUE PMI DUE EVERY 3,000 MILES			
PM Scheduled	10/04/2011	WO Meter 1	96978 MILES			
Contact Name		Projected Completion Date	NOT ASSIGNED			
Parent Multi-asset WO ID	2018-913	Priority	2 - URGENT			
Tasks: 1					Actions	
	Task ID	WAC	Remaining Hours			
	Start NR-3000 MILE - NON REVENUE PMI DUE EVERY 3,000 MILES		4.00			
				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		
Back Assignments New Appointment						

The Work Order Main area of the page displays general information regarding the work order. If your organization uses Enterprise Portal, Equipment and Work Order ID links are available.

- Click the Equipment link to open the associated asset screen (such as Asset Primary Information or Fleet Equipment).
- Click the Work Order ID link to open the Enterprise Work Order Center screen as determined by the type of work order. Click the Asset Viewer zoom icon to go to the Asset Viewer. Refer to the [Asset Viewer](#) section above for more information.
- The  contact icon allows you to view the employee who created the work order.

Tasks

The Tasks Section lists all tasks already assigned to this work order.

Tasks: 1				
		Task ID	WAC	Remaining Hours
	Start	NR-3000 MILE - NON REVENUE PMI DUE EVERY 3,000 MILES		4.00
New Task				

 When the task on the work order does not have a Work Accomplished Code (WAC) and one is required, then the task is highlighted as shown in the picture below. The WAC requirement is configured in the GUI, Locations screen. It should be set to either Post, Close or Finish.

	Task ID	Task Description	WAC
 View	A-A	ALCOHOL INJECTION SYSTEM - AIR	03
 View	B-U	BRAKE PACKAGE	
 View	C-	BODY & FRAME	

After entering a Final Status WAC, the code is displayed in the WAC column and the row is no longer highlighted. If it is not a Final Status WAC, the task will remain highlighted.

	Task ID	Task Description	WAC
 View	A-A	ALCOHOL INJECTION SYSTEM - AIR	03
 View	B-U	BRAKE PACKAGE	04
 View	C-	BODY & FRAME	06

As seen in the picture below, an **Oil Can Icon** will appear next to a PM or Inspection Task. A blue icon indicates the PM Checklist is COMPLETE and a yellow icon indicates the PM Checklist is INCOMPLETE. Click the icon to open the PM Checklist page. Refer to the [PM Checklist Page](#) for more information about the PM Checklist.

Tasks: 1				
		Task ID	WAC	Remaining Hours
	Start	NR-3000 MILE - NON REVENUE PMI DUE EVERY 3,000 MILES		4.00

Task ID Link

Click the Task ID number button in the Tasks section to open the Work Order Task page.

On the Work Order Task page, supervisors can update task details (for example, WAC codes, work class, warranty work, PM schedules [if tasks are PM or inspection tasks], etc.) and add notes to the work order. Refer to the [Work Order Task Page](#) section for more information about this page.

When you are done updating fields, click **Save** to save entries and return to the Work Order Main page.

New Task Button

Click **New Task** to assign new tasks to the work order.

You are taken to the Add Work Order Task pop-in where you may assign a new task to the work order. See the [Add Work Order Task Pop-in](#) section below for an overview of this page.

Service Request/Defects

The Service Request/Defects Section lists all service requests, defects, and required corrections assigned to the work order. It also allows supervisors to assign, unassign, and create new service requests/defects/required corrections.

If the Service Request is highlighted, it indicates that a task on the service request does not have a Work Accomplished Code (WAC). After 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. If it is not a Final Status WAC, the highlighting will remain. Service Request comments can be viewed directly from the line item by clicking the  icon.

Service Requests / Defects: 1	
	Code - Description
Select	Symptom: B02-00 - OIL LEVEL LOW / HIGH - SEE COMMENTS

Add / Manage

View/Edit Service Requests

➡ Click the **Symptom** link to view the service request.

Service Requests / Defects: 1	
	Code - Description
Select	Symptom: B02-00 - OIL LEVEL LOW / HIGH - SEE COMMENTS

Add / Manage

You are taken to the Service Request/Defect page.

Creating a service request or defect generally follows the same process as any other asset. However, the beginning and ending positions of the work must be specified for linear assets 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.
- The work position indicators are displayed as a green circle and red circle for the beginning and ending positions. Initially, both circles are displayed at the beginning of a linear asset on the left.

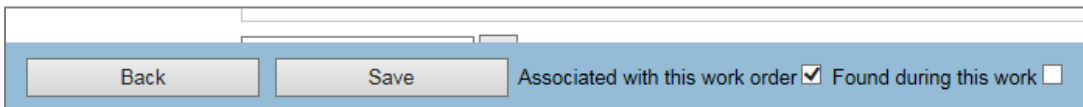
To change the work position:

- Click and drag the circle to the desired position while holding the left mouse button down.
- Click on a marker to move 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.

 **Note:** For linear assets, to the right of the asset ID (when it appears on most pages), there is an Attributes icon . Click this icon to see attributes and information for the liner asset.

 Open a blank Service Request/Defect page by clicking **Edit** on the Work Order Details page, or clicking the **New Service Request** button on either the Work Order Service Requests or the Equipment Management page. Simply complete the fields and click the **Save** button to create a new service request.

- 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.



 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.

 **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.

Complete the desired fields to edit the service request.

Other buttons in the Service Request/Defect page:

- **Add:** To add files, in the Files section, click **Add**. Refer to the [Actions Section](#) for information about the Add Link dialog and adding files. When editing the service request, be sure to save your edits by clicking the **Save** button.
- **Reject:** The **Reject** button shows when the service request is not assigned to a Work Order.

- **Unassign:** The **Unassign** button shows when the service request is not being jobbed and has no postings in lab_main, cml_main, or ptd_main and there are no pending part requests for any tasks related to this service request (even if the posting/part request is not specifically for this service request). Click **Unassign** to unassign the service request. When you click **Unassign**, you are taken back to the Work Order Main page.
- **Defer:** Defer the work order. After clicking **Defer**, you are taken back to the Work Order Main page. The **Defer** button displays when the following conditions are met:
 - The user has permission to defer service requests based on settings
 - There are no pending part requests for any task related to this SR
 - The Work Order is not closed.
- **Print Service Request:** Click this button to print the service request.
- **Corrected Failure:** Used to indicate which task on the service request corrected the failure represented by the Service Request.

Add New Tasks to the Service Request

In the Service Requests/Defects area, click **Select** to select new tasks to add to the service request. The Add Work Order Tasks pop-in displays. See the [Add Work Order Tasks Pop-in](#) section below for an overview of this page.

Add/Manage Button

To create a new service request or assign an unassigned service request, in the Service Requests/Defects area on the Work Order Main page, click **Add/Manage**. A highlighted **Add/Manage** button indicates that there are unassigned service requests pending. The Work Order Service Requests page opens. For more information regarding this page, see the [Work Order Service Requests Page](#) section below.

Assignments Button

Click **Assignments** to assign employees to the task/work order. Refer to the [Work Assignment Detail Page](#) section below for more information about this page.

New Appointment Button

Click **New Appointment** to schedule an appointment to a technician. Refer to the [Creating an Event](#) section for more information about scheduling appointments and assignments.

Actions

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

The Actions section contains the following buttons for additional work order functions:

Main Page

Click this button to navigate back to the main portal page.

Finish Work Order



Note: This button may also read **Next Stage** if you are on a production run work order that is not in the last stage, or **Open Work Order** if the work order is PENDING and the user is a SUPERVISOR.

- **Open Work Order** allows supervisors to open PENDING work orders. Note that a PENDING work order is automatically opened when a Technician jobs onto it.
- **Finish Work Order** button takes you to the Finish Incomplete Work Orders page to review any pending items and/or to continue to the Work Order Detail page.

See the [Finish Incomplete Work Orders Page](#) section below for an overview of this page. The Work Order Detail page is where you review previously posted work and place the work order into a finished status. See the [Work Order Details Page](#) section below for information regarding this page.



Note: Access to the **Finish Work Order** button is based on the user's control rights. Depending on control rights, the button may be enabled, hidden, or disabled.

Equipment History

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



Note: This button only shows if a work order is for an asset (not a part rebuild).

Messages

If the **Messages** button is highlighted yellow, it means there are messages pending for this piece of equipment. Pending messages may include: warranty coverage, potential comebacks,

other open work orders, late/soon due PM/inspection services, etc. Clicking **Messages** displays notifications for this equipment unit.



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

Commercial Work

This button opens the Commercial Work pop-in where existing commercial work, if any, is listed. Complete the fields as desired to enter new commercial work. Click **Save** to save your entry. Refer to the [Post Work Order Commercial Work Pop-in](#) section for more information about posting commercial work.

Start Delay/Stop Delay

This button opens the Work Order Delays page where you can review, enter, or stop 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**.

Asset ID	CAR01: EQTYPE		
Asset Number	ASSET001	Station Location	1 - OPS
License Number	SPOKAN01	Repair Location	1 - OPS
Operator Name			
Work Order ID	1-2017-23	Job Status	OPEN
Job Type	PM	Technician	
PM Service	PMSRV-001 - PM SERVICE	PM Scheduled	06/05/2017
WO Meter 1	20100 MILES	WO Meter 2	200 HOURS
Contact Name	Projected Completion Date		05/23/2017 05:00 AM
Priority	3 - ROUTINE		

Choose a Work Order Delay Code

Comment

(A) WAITING LEGAL/SAFETY/QA	(M) WAITING VENDOR/COMMERCIAL	(QA-01) QA - GENERAL DELAY CODE
(B) WAITING BAY/EQUIPMENT ACCESS	(P) AWAITING PARTS	(T) WAITING TOW/MOVE
(E) WAITING ENGINEERING	(PT) AWAITING PARTS - BUS TRIPPERED	(TS) TRANSFER SHOP RESPONSIBILITY
(L) WAITING LABOR	(PV) AWAITING PARTS VERIFICATION	(Z) WAITING OTHER



Options for setting up work delay codes are found on the Work Delay Codes screen. Refer to the help for the Work Delay Codes screen for more information.

Part Actions

This button is enabled when there is at least one task on the work order, or when the work order is in Wait For Equipment status. The **Part Actions** button opens the Post Work Order Parts pop-in to perform various parts actions, such as parts issues and requests, etc. Refer to the [Post Work Order Parts Pop-in](#) section for more information regarding this page.

Test Results

This button opens the **Test Results** pop-in to associate test results with a work order and to enter test result data. From this pop-in, you may also begin a new test result by selecting the test type in the **Start a New Test** drop-down and clicking **Start**.



For more information on test results, refer to the *Test Results Process Guide*.



Note: The **Test Results** button is highlighted yellow if a test result is pending or in progress for the work order.



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. See the [Work Order Test Results Page](#) section below for an overview of this page.

Print Work Order

Prints the Work Order Detail Report. The supervisor must have access rights granted to access this report.

SI Certification

This action is displayed if the current work order has PM Checklist items tied to a SI Certification record. If the SI Certification has checklist items that are not completed, a blue dot will be displayed on the left of the button. If the checklist items are completed, but not certified by a supervisor, the button will be highlighted yellow. Clicking the button will launch the SI Certification dialog.

Print SI Certification

Clicking this button will launch the Service/Inspection Certification report. The SI Certification Report setting must be enabled in the Work Management portal settings in order to see this button.

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 the [Work Order Details Page](#) section for information regarding this page.

Related Files

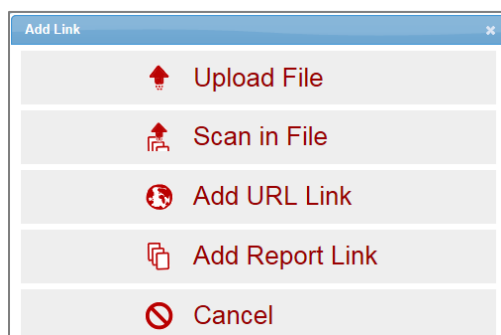
The button displayed depends on your configuration. A highlighted **Related Files** button indicates there are related files associated with the work order. Clicking this button takes you to the **Work Order Files** page to see the associated files or to add a link to a file or report for the particular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

To add a link:

 Click Add Link.



The Add Link dialog displays. Choose to upload a file, scan in a file, add a URL link, add a report link, or 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

Enter the file, title (optional), and description (optional), and 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:

To delete the file:

1. Click the  icon.

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

2. Click **OK** to remove the link.

To update the file:

1. Click the edit icon.

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

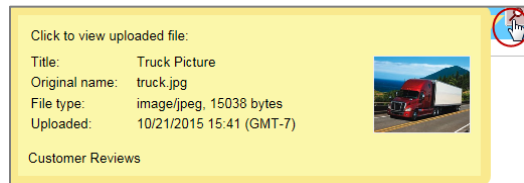
- i. **Cancel:** Closes the dialog. You can also press **Esc** or click the **X** in the top, right corner.
- ii. **Replace:** Allows you to replace the uploaded file with a different uploaded file, but keep the same basic information.

- a. Click **Replace** and a validation message displays.
- b. Click **Yes**.
- c. 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 fafile:/// URL, you will not be able to access the old file any more.

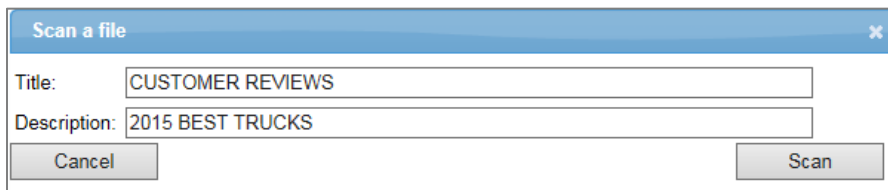
- iii. **Update Info:** Allows you to update the title and/or description. Enter the correct information and click the **Update Info** button.

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



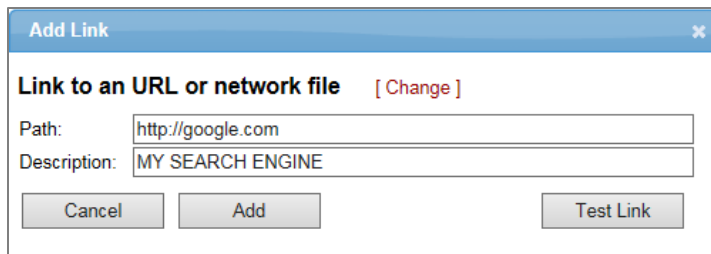
Scan in File

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



Add URL Link

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



Add Link [X]

Link to an URL or network file [Change]

Path:

Description:

Cancel Add Test Link

The URL link displays in the Related File Links section:



Related File Links

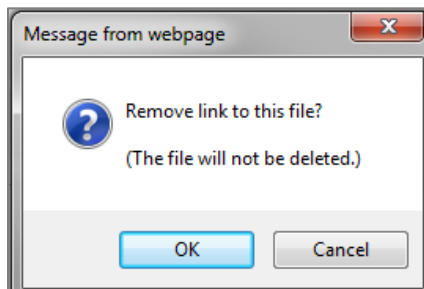
		Truck Picture CUSTOMER REVIEWS	
		http://google.com MY SEARCH ENGINE	

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

To delete the link:

1. Click the  icon to delete the link.

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



Message from webpage [X]

 Remove link to this file?
(The file will not be deleted.)

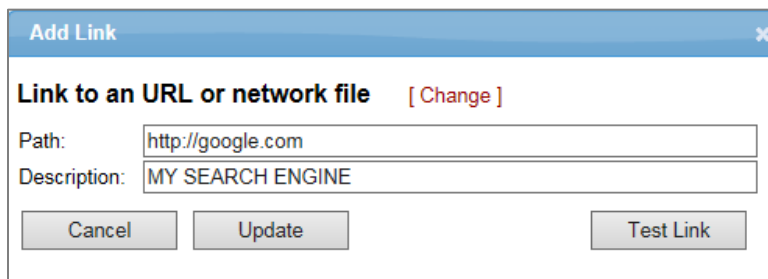
OK Cancel

2. Click **OK** to remove the link.

To update or view the link:

1. Click the pencil  icon to update the link.

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



Add Link [X]

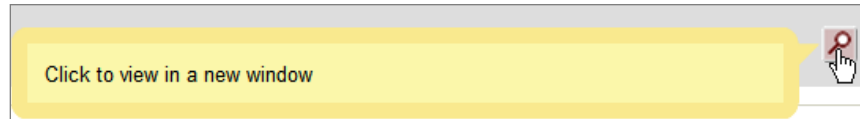
Link to an URL or network file [Change]

Path:

Description:

Cancel Update Test 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, or 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).



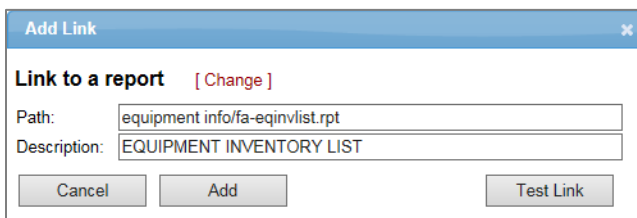
Note: For report links, `farpt:///` is automatically added to the file name when you save.

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 `equipment info`) and the name of the report (`fa-eqinvlist.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.



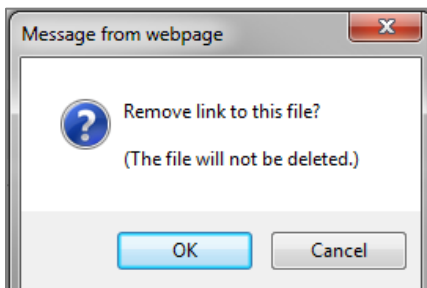
The report link displays in the **Related File Links** section:



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

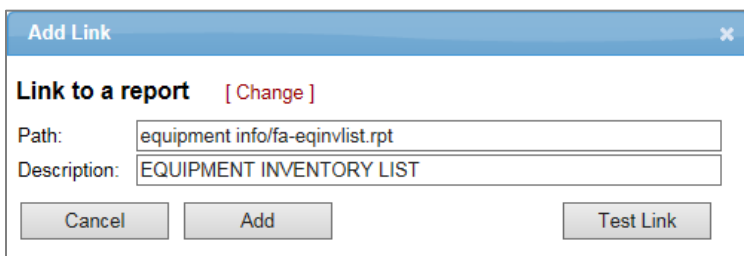
1. Click the  icon to delete the link.

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

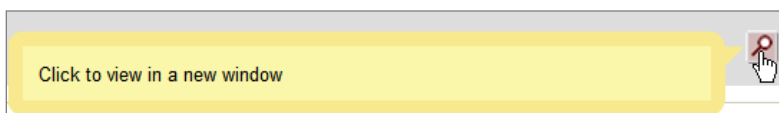


2. Click **OK** to remove the link.
3. Click the pencil icon to update the link.

*The **Add Link** dialog displays so 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.



Notes

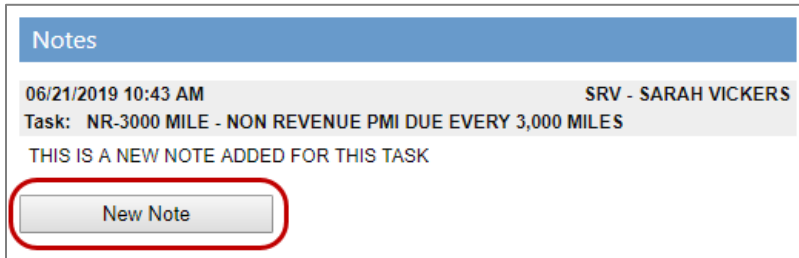
Use this area to add notes to the work order, service request, or task, or you may add, update and delete comments. The section that displays depends on your configuration.

Add a Note

Throughout Shop Activity, you may add notes at the work order-level and task-level.

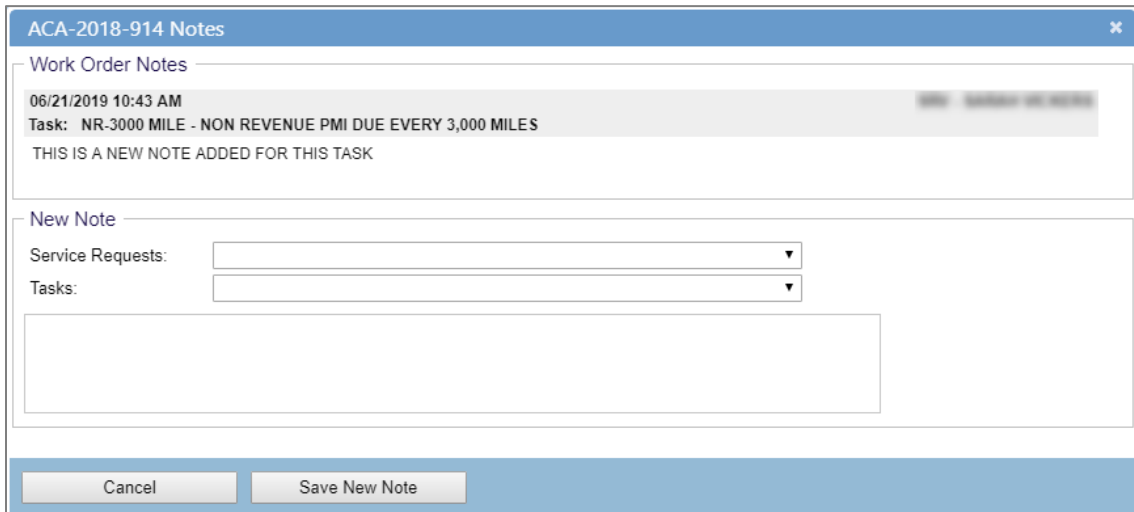
To add a note to a work order:

1. Click **New Note**.



The screenshot shows a 'Notes' pop-in window. At the top, there is a blue header bar with the word 'Notes'. Below it, the date and time '06/21/2019 10:43 AM' are displayed on the left, and 'SRV - SARAH VICKERS' is on the right. The task name 'Task: NR-3000 MILE - NON REVENUE PMI DUE EVERY 3,000 MILES' is shown. Below the task name, the text 'THIS IS A NEW NOTE ADDED FOR THIS TASK' is visible. At the bottom of the window, there is a button labeled 'New Note' which is circled in red.

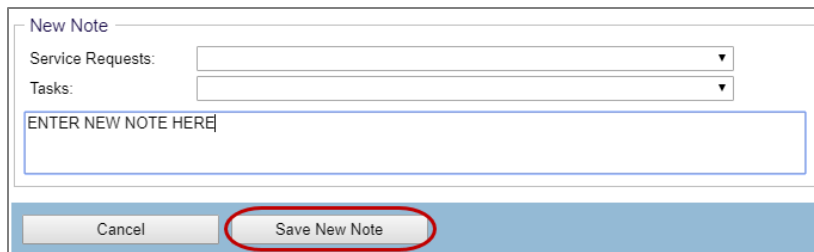
The **Notes** pop-in displays. Previously entered notes, if any, are listed at the top of the pop-in.



The screenshot shows a 'ACA-2018-914 Notes' pop-in window. It has a blue header bar with the title 'ACA-2018-914 Notes' and a close button. Below the header, there is a section titled 'Work Order Notes' which contains the same information as the previous screenshot: '06/21/2019 10:43 AM', 'SRV - SARAH VICKERS', 'Task: NR-3000 MILE - NON REVENUE PMI DUE EVERY 3,000 MILES', and 'THIS IS A NEW NOTE ADDED FOR THIS TASK'. Below this section, there is a 'New Note' section with two drop-down menus: 'Service Requests:' and 'Tasks:'. Both drop-down menus are currently blank. Below the drop-down menus is a large text area for entering the note. At the bottom of the window, there are two buttons: 'Cancel' and 'Save New Note'.

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

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



The 'New Note' form is a rectangular box with a light blue header. Below the header, there are two dropdown menus: 'Service Requests:' and 'Tasks:'. Below these is a large text area with the placeholder text 'ENTER NEW NOTE HERE'. At the bottom of the form, there are two buttons: 'Cancel' and 'Save New Note'. The 'Save New Note' button is highlighted with a red oval.

4. On the Work Order Main page, the new note displays at the top of the notes list.

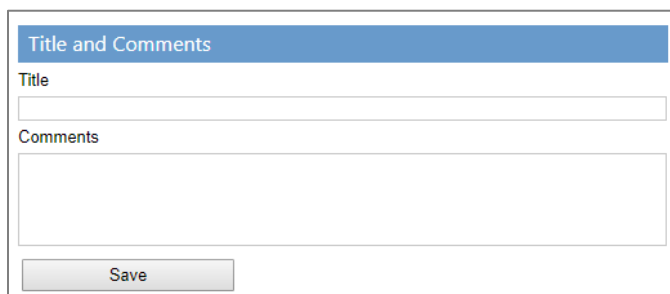
Title and Comments

This section displays the work order title and any comments associated with the work order.

Add or Delete a Comment

To add a new comment or title:

1. Type your comment or title into the corresponding field.



The 'Title and Comments' form is a rectangular box with a blue header. Below the header, there are two text input fields: 'Title' and 'Comments'. At the bottom of the form, there is a 'Save' button.

2. Click **Save**.

To edit or delete a comment or title:

1. Change the text of the title or comment that needs to change, or delete all text if needed.
2. Click **Save**.

Work Order Main Page for Part Rebuilds

Following is a sample Work Order Main page for Part Rebuilds.

Work Order Main

Quantity Completed 0

Part ID 7239-1 - BRAKE, PARKING, CQ-311 PARKING BRAKE LOCK PORTION, WESTINGHO

Work Order ID ABS172-2019-9 Job Status OPEN

Job Type INV REBUILD Restock Location ARM - ARMOUR YARD MAIN RAIL STORE RM

Rebuild Quantity 1 Projected Completion Date 06/21/2019 11:37 AM

Title PART REBUILD 001 Priority 2 - URGENT

Tasks: 3

Task ID
006-101 - BRAKE - LINE / HOSE
006-104 - BRAKE - FLUID
006-602 - BRAKE - STANDARD - REAR OVERHAUL

Actions

Main Page	Start Delay	View/Edit Detail
Finish Work Order	Part Actions	
Serial Numbers	Print Work Order	Completion
Commercial Work	Postings	Relationships

Notes

New Note

Title and Comments

Title PART REBUILD 001

Comments

New Task

Back Assignments

The upper left portion of the page displays general information regarding the work order. If your organization uses the Enterprise Portal, an Equipment link is available. Click on the Equipment link to go to the FleetFocus Parts Primary Information page.

The upper right portion of the page displays information about which employees are currently working in that location.

Tasks

The Tasks Section lists all tasks already assigned to this work order.

Task ID Link

1. Click the Task ID link in the Tasks section to open the Work Order Task page.

On the Work Order Task page, supervisors may update task details (i.e., work class, priority ID, estimated hours, etc.) and add notes to the work order. Refer to the [Work Order Task Page](#) section below for more information about this page.

2. Update the fields in the file as needed.
3. After the fields are updated as needed, click **Save** to save entries and return to the Work Order Main page.

New Task Button

Click the **New Task** button to assign new tasks to the work order.

You are taken to the *Work Order Task Selector* page where you may assign a new task to the work order. See the [Add Work Order Tasks Pop-in](#) section below for an overview of this page.

Assignments Button

 Click the **Assignments** button to make employee assignments to the work order or tasks. The **Assignments** button is highlighted when there are no assignments on the work order.

You are taken to the *Work Order Assignment Detail* page See the [Work Assignment Detail Page](#) section below for more information regarding this page.

Actions

The Actions section on the Work Order Main page for Part Rebuilds provides a slightly different selection of buttons than the Work Order Main page for Assets.

Actions		
Main Page	Start Delay	View/Edit Detail
Finish Work Order	Part Actions	Comments
Serial Numbers	Print Work Order	Completion
Commercial Work	Postings	Relationships

The Actions section contains the following buttons for additional work order functions:

Main Page Button

This button takes you back to the main portal page.

Finish Work Order Button

This button takes you to the Finish Incomplete Work Orders page to review any pending items and to continue to the Work Order Detail page. Refer to the [Finish Incomplete Work Orders Page](#) section below for an overview of this page. The Work Order Detail page is where you review previously posted work and place the work order into a finished status. See the [Work Order Details Page](#) section below for information regarding this page.



Note: Access to the **Finish Work Order** button is based on the user's control rights. Depending on control rights, the button may be enabled, hidden or disabled.

Serial Numbers Button

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

Commercial Work Button

This takes you to the Commercial Work pop-in where previous commercial work, if any, is listed. Complete the fields as desired and click the **Save** button to save your entry. Refer to the [Post Work Order Commercial Work Pop-in](#) section for more information about posting commercial work.

Start Delay Button

Takes you to the Work Order Delays page where you can review and enter or stop 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**.

- ✓ Options for setting up work delay codes are found on the Work Delay Codes screen. For more information, refer to the [Start Delay](#) section.

Parts Actions Button

This button is enabled when there is at least one task on the work order. The **Part Actions** button takes you to the Post Work Order Parts pop-in to perform various parts actions such as parts issues and requests, etc. Refer to the [Post Work Order Parts Pop-in](#) section below for more information regarding this page.

Print Work Order Button

Prints the Work Order Detail Report. The supervisor must have access rights granted to access this report.

View/Edit Detail Button

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

Notes Buttons

The button displayed depends on your configuration. Click this button to open the Notes or Comments pop-in for the particular work order. Refer to the [Add a Note](#) and [Add a Comment](#) sections above for information about using the Notes and Comments pop-ins. The Notes pop-in allows you to add notes to a work order, service request, or task and the Comments pop-in allows you to add or delete comments.



Note: You must click **Save New Note** to save your note.

Completion Button

The **Completion** button takes you to the Work Order Part Release Completion page. This page is provided in case you want to release some parts into inventory. It 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

Notes

In this section of the page, you may add and save notes or you may add, update, and save comments. The section that displays depends on your configuration. Be sure to save notes and comments prior to clicking **Back**, or you will lose your information. Refer to the [Add a Note](#) and [Title and Comments](#) sections for more information.

Put-away Process for Rebuild Work Orders

Work Order Rebuild Completion

- The bin that is used when the card is created can now be controlled on the rebuild work order screen.
- Bin will default to the location's default staging bin, if it has one.
- The Bin choice-list has custom behavior:
 - If the quantity entered is positive, it will show part location bins.
 - If the quantity entered is negative, it will show staging bins and part location bins.
 - If no quantity is entered, it will validate, show a message and focus into quantity.

Inventory Rebuild Work Order Closing

- When an inventory rebuild work order is closed with remaining quantity to be rebuilt, a put away card will be generated for the parts. When this happens, the report and labels will run (if the module setting is enabled).

Component Rebuild Work Order Closing

- When a component rebuild work order is closed, a put-away card is generated for the part. When this happens, the report and labels run (if the module setting is enabled).

14. Work Order Details Page

Table of Contents

- Work Order
- Timeline
- Notes
- Comments
- Tasks 2
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- Labor 1
- Parts 1
- Commercial
- 3C Summary
- Attributes
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- Files
- Map
- Summary Cost Info
- Viewing History 8

QA-FULL-01-2025-206

Enter work order title...

Component Warranty

Work Order

Edit Basic Information

Asset ID

QA-FLEET-001: 2011 QA-01 QA-01-01 QA FLEET 001

Equipment History

Station Location

QA-FULL-01 - QA FULL SRV LOCATION 01

Repair Location

QA-FULL-01 - QA FULL SRV LOCATION 01

Work Order ID

QA-FULL-01-2025-206

Job Status

OPEN

Job Type

REPAIR

Service Status

QA-01 - AVAILABLE FOR SERVICE

WO Meter 1

1600 MILES

Contact Name

I

Contact Phone

5095527050

Projected Completion Date

02/26/2025 03:08 PM

Contact Email

Priority

01 - HIGH PRIORITY - 24H

Repair Reason ID

QA-1 - REASON 1 - BASIC

Work class

Timeline

Created 02/13/2025 08:46 AM

Opened 02/13/2025 08:46 AM

First Labor 02/13/2025 12:00 AM

Finished

Closed

Show More

Notes + Add Note

No notes.

Comments + Add Comments

No comments.

Tasks + Add Task Reorder Tasks Edit Tasks

Labor	Parts	Cml	Task	WAC	Posted Hours	Estimated Hours	Location	Service Request
1	1	0	QA-RP-01 - QA REPAIR TASK 1		1.5	0.00	QA-FULL-01	
0	0	0	QA-RP-03 - QA REPAIR TASK 3		0	0.00	QA-FULL-01	QA-FLEET-001-604

Rows: 2

Assignments Edit Assignments



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

Work Order Details

Asset ID LOC 11 NL:

Station Location QA-FULL-01 LOCATION

Numeric 1 6

Work Order ID QA-FULL-01

Work Order Details Sections

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

Work Order

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.

Edit Basic Info Button

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

Editing 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.



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 is enabled for the location of the work order.

2. 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.
3. 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 only displays if the work order type is set to REPAIR.

The Change Asset ID pop-in displays.

Be aware of the following items before changing the 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 clear and set to 0.



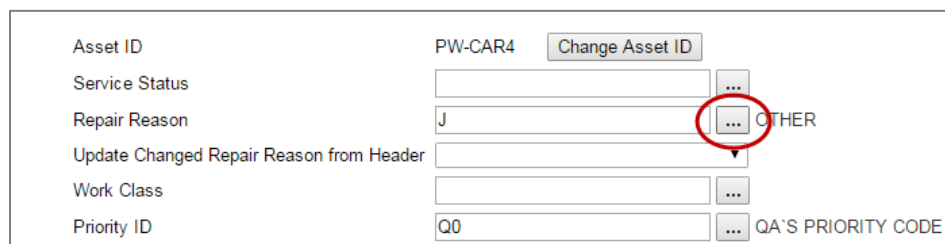
Note: Any change to an asset ID or offsets on a linear work order will result in all service requests being unassigned and the user must manually re-assign service requests if desired.

- i. Complete the fields and click **Save** to save your entries.

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

5. On the Edit Work Order Basic Info page, you may also change the Repair Reason.

- i. Click the  button next to the **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 **Search** to bring up a list of repair reasons. To shorten this list, type in the first few letters of the reason 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 **Update changed repair reason from header** drop-down.

The screenshot shows a form with several fields: Service Status, Repair Reason (containing 'J'), Update Changed Repair Reason from Header, Work Class, Priority ID, and Account ID. The 'Update Changed Repair Reason from Header' dropdown menu is open, displaying three options: 'HEADER ONLY' (highlighted in blue), 'ALL TASKS', and 'ONLY TASKS WITH OLD REASON'. To the right of the dropdown, there are labels for 'OTHER', 'NON-SCHEDULED', and 'EMERGENCY/IMMEDIATE'.

- 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.

6. At the bottom of the Edit Work Order Basic Info page, click **Save** to save all changes.

Timeline

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

Notes

The Notes/Comments section displays depending on your settings. The notes displayed in this section include all the notes pertaining to the work order. To add a note at the task level, click the **Add Note** button and select the task from the Task drop-down list or click the New Note icon  in the Task row associated with the task.

Comments

Click **Add Comments** to enter a new comment.

Tasks

The Tasks section provides information about all the tasks on the work order. Click the **Task ID** to go to the Work Order Task page. See the [Work Order Task Page](#) section for information about updating task fields.

Add Task

Click the Add Task button to be taken to the Add Work Order Tasks page where you can add Repair Tasks, PM Services, Inspections, or Standard Jobs.

Reorder Tasks

Click the Reorder Tasks button to reorder the tasks listed in this section.

Edit Tasks

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

This page lists the work order tasks. Delete a task by checking the **Delete** checkbox next to the task and saving. If an **Oil Can**  **Icon** shows for a PM or Inspection Task, click it to open the PM Checklist. See the [PM Checklist Page](#) section for information about this page.



Note: A yellow Oil Can  icon indicates the PM Checklist has incomplete items.) Or, you may click the **Task ID button** to go to the Work Order Task page for the particular task. You may also update the following fields on multiple tasks: Equip Warranty, WAC (highlighted yellow if a WAC is needed), Repair Reason, Update PM Schedule, Location, and Date and Time Completed.



Note: The **Default the work order finish date and time from latest labor or commercial transaction instead of now** setting on the Locations screen, Work Orders - Defaults tab also applies to the **Date and time completed** that is applied to the tasks after finishing the work order.

Assignments

This section displays assignments associated with the Work Order. Click **Edit Assignments** to go to the Work Assignment Detail page where you can manage assignment details.

Service Requests

Click **Add/Manage** to add or edit a service request. Click the **Service Request ID** to be taken to the [Service Request / Defect](#) page.

Labor

This section displays labor details for the Work Order. Click the **Post Labor** button to open the Post Work Order Labor pop-in where you can post labor to the service request or work order. Refer to the [Posting Labor Pop-Ins](#) section for more information about posting labor.

Click **New Job** to be taken to the Post Work Order Labor pop-in where you can create a new Service Request or Labor Posting.

Click **Crew Time Entry** to be taken to the Post Work Order Crew Labor pop-in where you can manage crew postings.

Parts

Click **Post Parts** to be taken to the Post Work Order Parts pop-in where you can post parts (issue or request parts) to the service request or work order. Refer to the [Posting Labor Pop-Ins](#) section for more information about posting parts.

Commercial

Click **Post Commercial** to go to the Post Work Order Commercial Work pop-in where you can post commercial work to the service request or work order. Refer to the [Posting Labor Pop-Ins](#) section for more information about posting commercial work.

3C Summary

This section provides information about the 3Cs (Complaint, Cause, and Correction warranty).

Click **Edit 3Cs** to go to the Edit 3C Summary pop-in where you can complete the fields and click **Save** to make changes to the summary.

Attributes

Associated attributes are listed in the Attributes section. Click Add Attributes to be taken to the Select Work order attribute ID pop-in where you can select an attribute from the attribute chooser to add it to the Work Order.

Tests Results

Tests results are displayed in this section. Click the **Test Details** button to view/edit Test Details or to start a new test. Refer to the [Work Order Test Results Pop-in](#) section for more information about test results.

Files

This section displays files associated with the Work Order. Click **Add File** to be taken to the Work Order Files page where you can view the files.

Map

The Map section is available to display assets, field equipment, and unassigned service requests and work orders from the available filters saved for the current user and location. This section only displays if your organization is licensed for mapping. If enabled, click an item in the list to highlight it on the map.

Summary Cost Info

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

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. Technicians who have reviewed the work order will display on 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 have edit rights to be logged into this table.

Posting Labor Pop-ins

Post labor by clicking the **New Job** button or the **Labor** button on the Work Order Details section. Depending on which button you clicked, 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.

The screenshot displays the 'Work Order Details' page. At the top, there is a 'Comments' section with a text area and a 'Save Comments' button. To the right, a vertical menu contains buttons for 'Add / Manage SRs', 'Work Order Tasks', 'New Job' (circled in red), 'Edit', 'New Task', 'Parts', and 'Cml'. A red box labeled 'New Job and Labor buttons' has arrows pointing to the 'New Job' button and the 'Labor' button in the 'Work Order Postings' section. The 'Work Order Postings' section lists two complaints: 'RPLC ANTIFREEZE - COOLING SYSTEM > OVERHEATING > RPLC ANTIFREEZE' and 'LEAKING-HOSES - FUEL SYSTEM > HOSES > LEAKING HOSES'. Each complaint has a row of buttons: 'Edit', 'New Task', 'Parts', and 'Cml'. The 'Labor' button in the first row is circled in red. Below the 'Work Order Postings' section, there is a 'Tasks not on Service Requests' section with a 'Labor' button circled in red. At the bottom, there is a summary bar with '000-803 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-802', 'Remaining Hours: 0.00', and 'WAC:'. The bottom navigation bar includes buttons for 'Back', 'Assignments', 'Finish Work Order', 'Close Work Order', and 'Transfer/Defer Work'.

New Job Pop-in

Based on Work Order Location Settings, the **New Job** button can allow 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).

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

Comments

Save Comments

Files

Test Results

Equipment Usage

Crew Time Entry

Add / Manage SRs

Work Order Tasks

New Job

After clicking **New Job** 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** pop-in.



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 workflow 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 pop-in 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. Pending service requests are displayed so they can be assigned to the work along with associating a task to the service request. Pending Service Requests will automatically be assigned when users add fault codes or post labor.

To see the Create New SR tab, the location profile settings for the location of the work order must be set as follows:

- **Labor entry method** must be set to **POST**
- **Allow Service Request Selection on New Job dialog** must be checked

New Job

Service Request

Existing SRs

Create New SR

	Symptom / Task	Comments
Select	Symptom: BW1 - BROKEN WINDOW > BROKEN WINDOW SYMPTOM 1	TEST COMMENT TEST COMMENT TEST COMMENT TEST COMMENT TEST COMMENT TEST COMMENT TEST COMMENT TEST COMMENT TEST COMMENT
Select	Symptom: BREAKS - TASK DEFAULT COMPLAINT COMMENT 1	

Add Labor Posting - Line 1

Technician

...

Task ID

...

Lookup

Total number of times task performed

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

Follow the steps below to create a new service request.

1. From the Work Order Details page, click **New Job**.
2. Complete the fields in the Service Request section: Standard Job, Complaint (Symptom), Cause, WAC, 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.

Task ID	Description
001	ELECTRICAL SYSTEM
BYW	WARRANTY TASK
CNT	CN REPAIR GROUP
FAC	FACILITIES
GNM	GNM REPAIR GROUP
GSL	GSL REPAIR GROUP
GVS	GVS REPAIR GROUP
JSR	JSR
KG2	KG RPR GRP2

3. If you have any labor posting information, continue to the section below to post labor. Otherwise, click **Save** to save the service request.

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

To post labor to the service request:

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

The Technician defaults in the pop-in.

- i. 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
Q1-01	TASK
Q1-01-01	COMP WARR TASK
Q1-01-02	COMP WARR TASK NEVER UNDER WARRANTY

- ii. Enter or select a **WAC** using the **Select** icon .
- iii. 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 after selecting the start and end times.
- iv. The **Time Code** defaults. Use the **Select** icon  to select a different time code.
- v. Enter or select an **Account Code**.
- vi. Enter or select a **Repair Reason**.
- vii. Add **Comments** if desired.
- viii. Check the **No Parts Needed** box (if applicable)

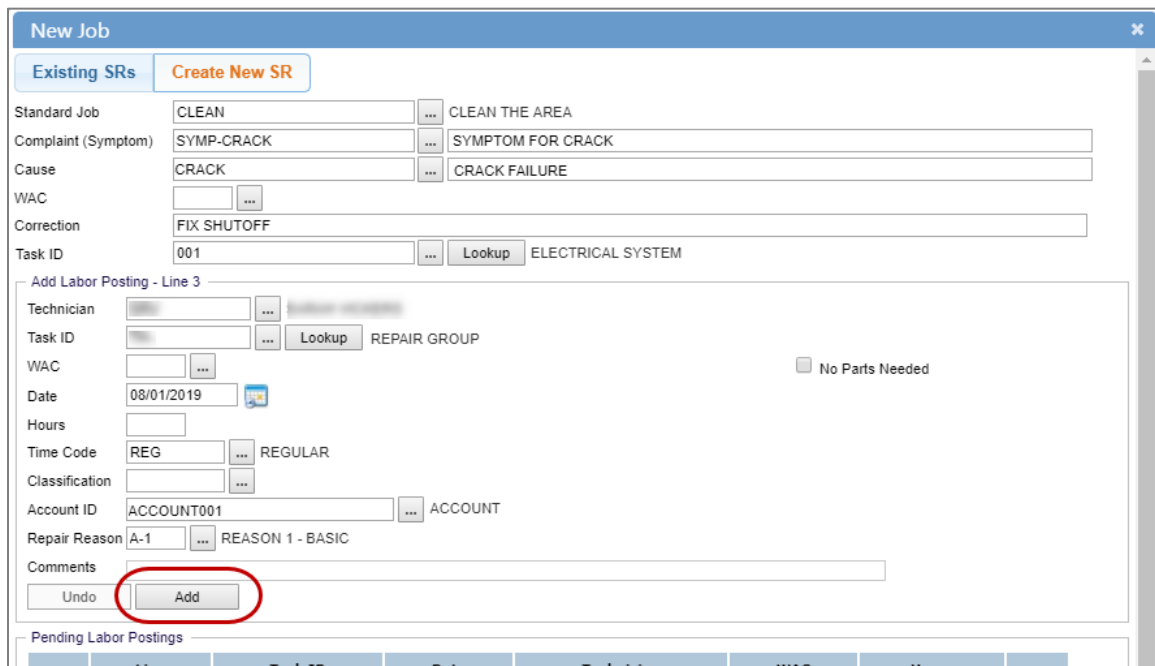


The date format depends on your Work Order Location Settings.



The **No Parts Needed** checkbox only needs to be enabled once per task to which it applies. When the user flags **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.

2. Click **Add**.



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

Pending Labor Postings							
	Line	Task ID	Date	Technician	WAC	Hours	
	1	REPAIR GROUP	08/02/2019				
	2	REPAIR GROUP	08/01/2019				

Cancel Save

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

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

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

Repair Reason: A-T REASON: BASIC

Comments

Undo **Update**

Pending Labor Postings							
	Line	Task ID	Date	Technician	WAC	Hours	
	1	REPAIR GROUP	08/02/2019				
	2	REPAIR GROUP	08/01/2019				

Cancel Save

- 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.

Post Labor to an existing Service Request

The New Job pop-in 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 pop-in provides the service request information at the top of the pop-in. 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, complete the Add Labor Posting fields as outlined [above](#) in the New Job Pop-in, labor section.

New Job

Complaint (Symptom) SYMP-CRACK - SYMPTOM FOR CRACK

Cause CRACK FAILURE

Correction FIX SHUTOFF

Task 001

Select Different SR

Add Labor Posting - Line 1

Technician ...

Task ID 001 Lookup ELECTRICAL SYSTEM

WAC ...

Date 08/02/2019

Hours

Time Code REG REGULAR

Classification ...

Account ID ...

Repair Reason QA-1 REASON 1 - BASIC

Comments

Undo Add

Pending Labor Postings

Line	Task ID	Date	Technician	WAC	Hours
------	---------	------	------------	-----	-------

Cancel Save

 With only one service request on the work order, clicking the **Select Different SR** link opens the dialog's Existing SR's 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

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

The Create New SR tab displays.

To create the new service request:

Complete the service request fields (as outlined [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 shown [above](#)).

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.

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

1. Click **Select** to post labor to a 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 [Create a New Service Request and \(Optional\) Post Labor](#) section above).

	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

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.

 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 shown [above](#) in the New Job Pop-in labor section. Refer to 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. After 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.

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

Post Work Order Labor

Service Request

Symptom: SEIZING UP - BREAK SIEZING UP

Complaint: BREAK DOES NOT RELEASE FULLY SOMETIMES AFTER SUDDEN STOPS.

Fail / Cause Code: ...

Cause:

Correction:

Tasks Correcting Failure: 001-001 X

Faults: ... X 1 Add

0003 X 0001 X

[See Less](#)

Add Labor Posting - Line 1

Technician: SYSADMIN ... SYSADMIN

Task ID: 001-001 ... [Lookup](#) ELECTRICAL - REWIRE HEADLIGHTS

Total number of times task performed: 1

☒ Corrected Failure

WAC: ... ☐ No Parts Needed

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.

Work Order Postings

Complaint	SYMP-CRACK	Edit Labor New Task Parts Cml
Cause	CRACK FAILURE	
Correction	FIX SHUTOFF	
Task	001 - ELECTRICAL SYSTEM	

001 - ELECTRICAL SYSTEM Remaining Hours: 0.00 WAC:

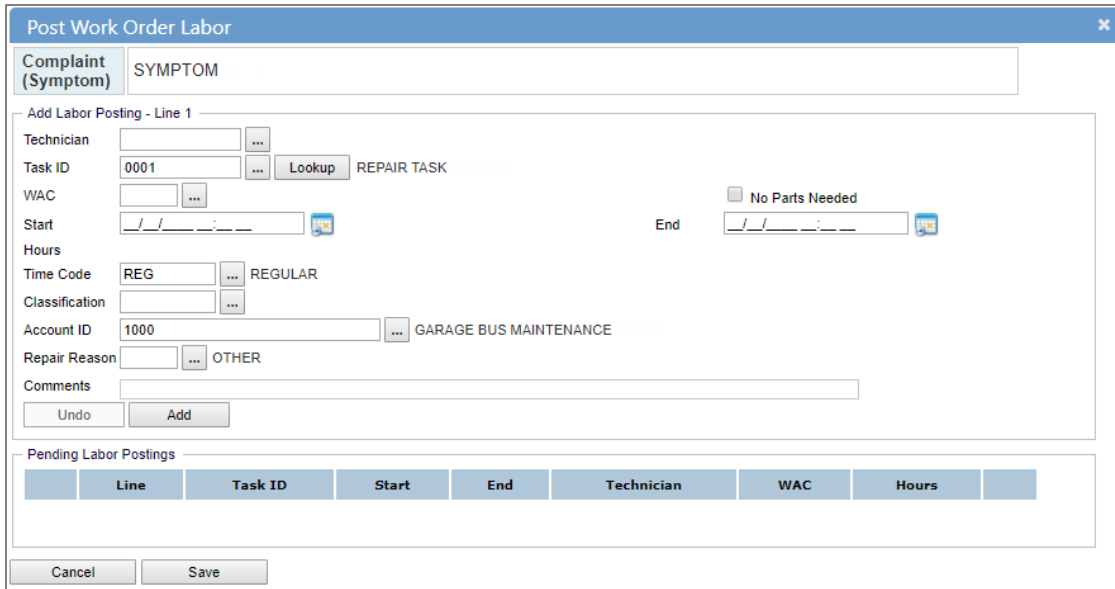
The Post Work Order Labor pop-in shows the Service Request information completed at the top and indicates that the labor will be posted to a task on the service request. If there is only one non-service request task, that task defaults on the pop-in.



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

Complaint (Symptom): SYMPTOM

Add Labor Posting - Line 1

Technician: [] ...

Task ID: 0001 ... Lookup REPAIR TASK

WAC: [] ...

Start: [] ... End: [] ... No Parts Needed

Hours: []

Time Code: REG ... REGULAR

Classification: [] ...

Account ID: 1000 ... GARAGE BUS MAINTENANCE

Repair Reason: [] ... OTHER

Comments: []

Undo Add

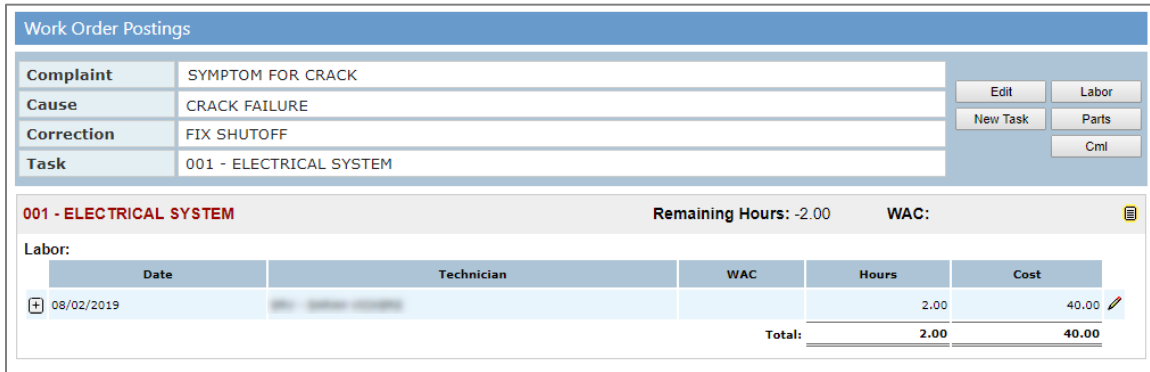
Pending Labor Postings

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

Cancel Save

- Follow the steps 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.

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



Work Order Postings

Complaint: SYMPTOM FOR CRACK

Cause: CRACK FAILURE

Correction: FIX SHUTOFF

Task: 001 - ELECTRICAL SYSTEM

Edit Labor New Task Parts Cml

001 - ELECTRICAL SYSTEM Remaining Hours: -2.00 WAC:

Labor:

Date	Technician	WAC	Hours	Cost
08/02/2019	[]	[]	2.00	40.00
Total:			2.00	40.00

Post Labor to a Task Not on a Service Request

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



Tasks not on Service Requests

Labor Parts Cml New Task

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 ...

Task ID ...

WAC ... ☐ No Parts Needed

Date 08/02/2019

Hours

Time Code REG ... REGULAR

Classification ...

Account ID ...

Repair Reason ... REASON 1 - BASIC

Comments

Pending Labor Postings

Line	Task ID	Date	Technician	WAC	Hours
------	---------	------	------------	-----	-------

- Follow the steps 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.

Edit Work Order Labor Pop-In

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

001 - ELECTRICAL SYSTEM

Remaining Hours: -2.00

WAC:

Labor:

Date	Technician	WAC	Hours	Cost			
08/02/2019			2.00	440.00			
Technician	Start	End	Time Code	Service Request ID	Task ID	WAC	Hours
			REG	-CAR01-2957816	001		2.00
Total:						2.00	440.00

To edit posted labor:

- Click the edit pencil icon next to the line to edit.

Remaining Hours: -2.00

WAC:

Technician	WAC	Hours	Cost
		2.00	440.00

End	Time Code	Service Request ID	Task ID	WAC	Hours
	REG	CAR01-2957816	001		2.00
Total:				2.00	440.00

The Edit Work Order Labor pop-in displays.

Edit Work Order Labor

Complaint (Symptom) SYMPTOM

Edit Labor Posting

Service Request ID 350

Task ID 0001

WAC 04

Start 07/06/2018 09:31 AM

Hours 1.22

Time Code DI

Classification

Account ID 1000

Comments

Cancel Save Full Reversal

Labor History

Posted By	Start	End	Date	Time Code	Service Request ID	Task ID	WAC	Hours
AA	07/06/2018 09:31 AM	07/06/2018 10:44 AM	07/06/2018	DI	350-2945472	REPAIR TASK	04	1.22

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

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

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

3. Click the + to review the details of the edited labor hours.

To complete a full reversal of the labor hours posted:

1. Select the **Edit**  icon on the Work Order Details page and click the **Full Reversal** button on the Edit Work Order Labor pop-in.

Posted By	Date	Time Code	Service Request ID	Task ID	WAC	Hours
	08/02/2019	REG	CAR01-2957816	001 - ELECTRICAL SYSTEM		2.00

The Work Order Details page no longer displays the labor entry for the task.

Post Work Order Parts Pop-In

When you click the **Parts** button on the Work Order Details page or **Part Actions** button on the Work Order Main 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. Serial information does not display unless there is a serialized part as part of the part posting.

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) SYMPTOM FOR CRACK

Cause CRACK FAILURE

Correction FIX SHUTOFF

Task 001 - ELECTRICAL SYSTEM

Basic Info | **Standard Parts**

Add Parts Posting - Line 1 ☐ Issue ☒ Request

Task ID: 001 ELECTRICAL SYSTEM

Stock Location: ACA ASSET CENTRAL ADMINISTRATION

Part:

Manuf Part No:

Qty: Qty on Hand:

Date Required:

Vendor ID:

Account ID: 1000.111101.00001.000.00000

Comments:

☐ Issue Together

Service Request: SYMPTOM FOR CRACK

WAC:

Bin:

Description:

Manufacturer:

Unit Price: Core Value:

NFI: ☐ Est Unit Cost:

Fail/Cause ID:

Priority ID:

Pending Parts Postings

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action

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



The **Standard Parts** tab highlights when standard parts exist for the class/task. See the [Standard Parts Tab – Issue/Request Standard Parts](#) section below for more information about standard parts. The **History** button is highlighted if part request history exists for the task. See the [Parts History Pop-in](#) section for more detail.

Post Work Order Parts

Basic Info | **Standard Parts**

Add Parts Posting - Line 1 ☐ Issue ☒ Request

Task ID: PM SERVICE A

Stock Location: ACA ASSET CENTRAL ADMINISTRATION

Part:

Manuf Part No:

Qty: Qty on Hand:

Date Required:

Vendor ID:

Account ID: 1000.111101.00001.000.00000

Comments:

☐ Issue Together

Service Request:

WAC:

Bin:

Description:

Manufacturer:

Unit Price: Core Value:

NFI: ☐ Est Unit Cost:

Fail/Cause ID:

Priority ID:

Pending Parts Postings

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action

It is on the Post Work Order Parts pop-in where you may request parts to create a part request and issue parts to post the parts from inventory to the work order. Or, in the case of Not from Inventory (NFI) parts, you may issue parts not in your inventory to the work order.



The Default Part Action for Location setting under the Work Order Location settings for a given location is the setting that controls the default parts action. The Default Parts Action rules follow below.

The Default Parts Action is:

- Request (if one of the following is met)
 - If Default Part Action for Location is REQUEST, and the user can request parts
 - If Default Part Action for Location is BY LABOR METHOD, labor method is REALTIME or BOTH, and user can request parts
 - If Default Part Action for Location is BY LABOR METHOD, labor method is POST, and user is NOT allowed to issue parts
- Issue (if one of the following is met)
 - If Default Part Action for Location is ISSUE, and the user can issue parts
 - If Default Part Action for Location is BY LABOR METHOD, labor method is POST, and user can issue parts
 - If Default Part Action for Location is BY LABOR METHOD, labor method is REALTIME or BOTH, and user is not allowed to request parts



It is recommended that users do not hide/disable the Issue and Request buttons via user interface (UI) rights. Use portal settings instead.

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.

Enter your basic information

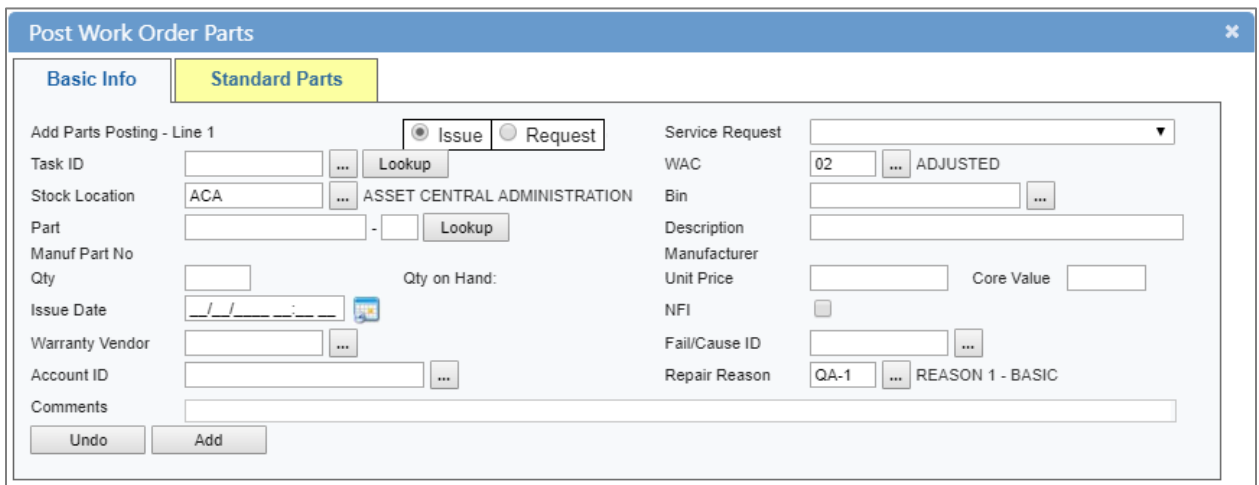
1. Select the desired radio button (**Issue** or **Request**).

The screenshot shows the 'Post Work Order Parts' window with the 'Basic Info' tab active. Under 'Add Parts Posting - Line 1', there are input fields for Task ID, Stock Location (set to ACA), Part, and Qty. To the right of the Task ID field is a 'Lookup' button. A red circle highlights the radio buttons for 'Issue' and 'Request', with the 'Request' button being selected.

 **Note:** Radio button defaults per rules for default part actions outlined above.

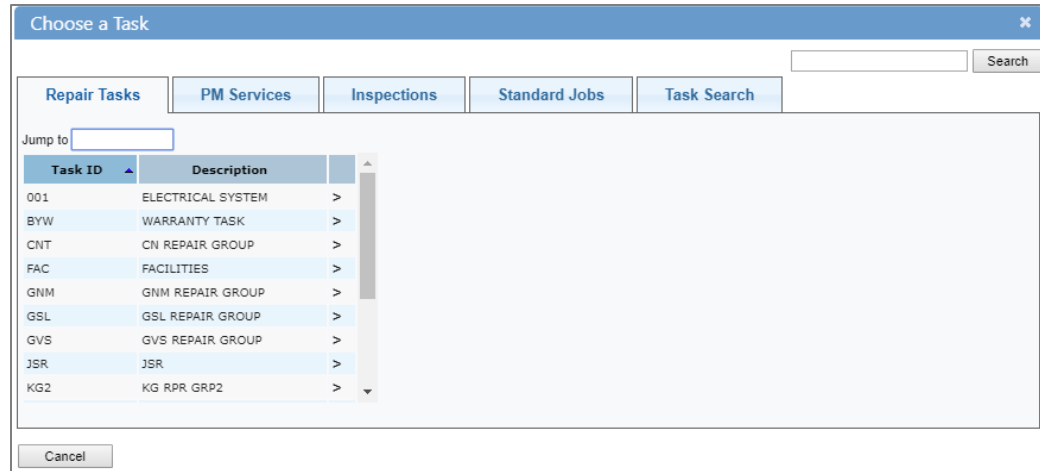
- The **Issue** radio button is visible if the user is in a group that can perform part issues, based on the setting: **Allow users in this group to issue parts**.
 - The **Request** radio button is visible if the user is in a group that can perform part requests, based on the setting: **Allow users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



*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.*

3. **Task ID** may be entered or selected with the **Select** icon  or the **Lookup** button.
- 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. Select a tab and the desired task. It automatically loads the task in the **Task ID** field.



The "Choose a Task" dialog box features a search bar at the top right with a "Search" button. Below the search bar are five tabs: "Repair Tasks", "PM Services", "Inspections", "Standard Jobs", and "Task Search". The "Repair Tasks" tab is currently selected. Below the tabs is a "Jump to" input field. The main area displays a table with two columns: "Task ID" and "Description". The table contains the following data:

Task ID	Description
001	ELECTRICAL SYSTEM
BYW	WARRANTY TASK
CNT	CN REPAIR GROUP
FAC	FACILITIES
GNM	GNM REPAIR GROUP
GSL	GSL REPAIR GROUP
GVS	GVS REPAIR GROUP
JSR	JSR
KG2	KG RPR GRP2

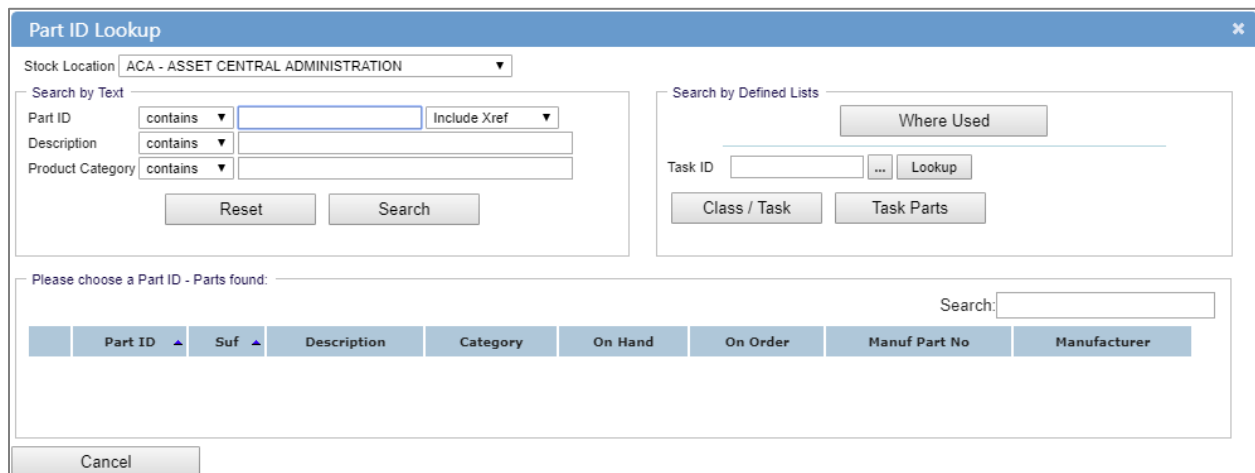
At the bottom left of the dialog is a "Cancel" button.

4. The following fields may be auto-populated as described below:

- **WAC** is hidden for Part Rebuilds.
- The **Stock Location** defaults as the last-entered location if previous pending postings exist or as the current Work Order Location's stock location. Enter or select a different one if desired.
- The **Bin** choice-list is dynamic based on Stock Location and Part ID and lists all bins for that location/part.

Enter or Look Up the Part

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:



The "Part ID Lookup" dialog box has a "Stock Location" dropdown menu set to "ACA - ASSET CENTRAL ADMINISTRATION". Below this are two search sections. The "Search by Text" section includes dropdowns for "Part ID", "Description", and "Product Category", each with a "contains" filter and an "Include Xref" dropdown. There are "Reset" and "Search" buttons. The "Search by Defined Lists" section includes a "Where Used" button, a "Task ID" input field with a "Lookup" button, and "Class / Task" and "Task Parts" buttons. Below these sections is a section titled "Please choose a Part ID - Parts found:" with a search bar. A table displays the results with columns: "Part ID", "Suf", "Description", "Category", "On Hand", "On Order", "Manuf Part No", and "Manufacturer". A "Cancel" button is at the bottom left.

1. The **Stock Location** is a drop-down list of the user's supported stock locations, and is defaulted when opened. 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, 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.
 - (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 use the filter, click **Search**. 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.

	Part ID ▲	Suf ▲	Description
	BY-BASEPART	1	499; DESC
	GRASSHOPPER SS-C138	0	KNIFE; THE GRASSHOPPER'S SIZE IS CLOSEST TO THAT OF A TRUE PENKNIFE WITH ITS BLADE OVER TWO-INCHES.
	PMM-ASPHALT SEALCOAT	0	SEALCOAT; POLYMER MODIFIED MASTERSEAL - ASPHALT AND BLACKTOP SEALCOATING

 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 Documoto™, attempts to search for that part, and brings the user straight to the part, if possible. For more information about Documoto, refer to the *Illustrated Parts Catalog Administrator Guide*.

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

- In the **Search by Defined Lists** area of the pop-in, click **Where Used** or **Class/Task** to see the list of parts.

- The **Where Used** 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.

- Depending on your system 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.

- 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 can also click **Task Parts** to see a list of all the parts that have the associated selected task (on the Parts – Primary Information screen, Repair tab in Enterprise Portal).
- The **Refine Search** field allows you to further limit the search according to the refinement set in the field. For example, entering **02-** and clicking the **Refine Search** button will display only the parts containing **02-**.

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.

6. The following fields default, or are available for information as described below:
- **Description** defaults per screen or from the part ID lookup.
 - **Qty** defaults to 1.
 - **Qty on Hand** displays only if the portal setting **Display parts quantity on hand** is set to **Number of parts (default)**.
 - **Qty Available** displays only if portal setting **Display parts quantity on hand** is set as **Available (yes/no)**.
 - **Unit Price** defaults based on part ID and stock location.
 - **Core Value** defaults per screen.
 - **Estimated Unit Cost** displays for Request only.
 - **Installed Serial Number** and **Removed Serial Number** display for serialized parts. (Installed and removed serial numbers are required when issuing serialized parts.)
 -  Note: 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.
 - **Position** displays only if part ID requires positional information.
 - **From Marker/Offset** and **To Marker/Offset** display for linear work orders.
 - **Issue Date** displays 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 defaults to today. Also, if any employee is capturing labor on the task, the issue date defaults to today instead of last posting date.
 - **Date Required** displays for request only.
 - **NFI** is only visible if the user is in a group that can do NFI issues, based on the setting: **Allow users in this group to issue NFI (not from inventory) parts**. Part ID and suffix are required for NFI parts.
 - **Warranty Vendor** shows for Issue only.
 - **Vendor ID** displays for request only.

- **Vendor Contract ID** allows you to search for the vendor contract. This defaults to contracts and vendors available depending on the amount used and date (if the contract is or will be active during the date chosen).
 - **Fail/Cause ID** defaults per screen.
 - **Account ID** defaults to the last-entered account if previous pending postings exist or else uses the current work order account ID.
 - **Priority ID** displays 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.
 - **Repair Reason** displays for issue only.
 - **Comments**
 - **Issue together** This box is checked if all the parts need to be 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).
7. Click **Add** to add the part (issue/request) to the Pending Parts Postings on the bottom of the pop-in.

The screenshot shows a form with fields for Date Required, Vendor ID, Account ID, and Comments. Below these fields are 'Undo' and 'Add' buttons. The 'Add' button is circled in red. Below the form is a table titled 'Pending Parts Postings' with columns: Line, Task ID, Part ID, and Description.

 Note: **Undo** resets the fields to their default values.

The part request shows in the Pending Parts Postings section as a REQUEST.

Finish the Issue/Request Parts

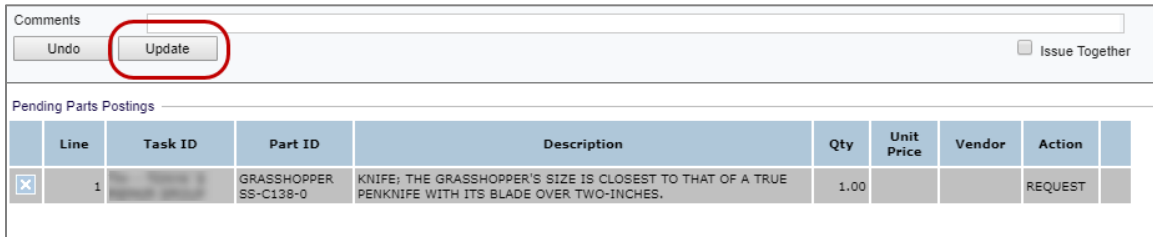
1. Click the **Edit** pencil icon to update a pending part request.

The screenshot shows the 'Pending Parts Postings' table. The first row is highlighted in grey. The table has columns: Line, Task ID, Part ID, Description, Qty, Unit Price, Vendor, and Action. The 'Action' column for the first row contains the word 'REQUEST' and a pencil icon, which is circled in red.

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1		GRASSHOPPER SS-C138-0	KNIFE; THE GRASSHOPPER'S SIZE IS CLOSEST TO THAT OF A TRUE PENKNIFE WITH ITS BLADE OVER TWO-INCHES.	1.00			REQUEST 

The pending part posting line is highlighted in grey.

- After updating the information, click **Update**.



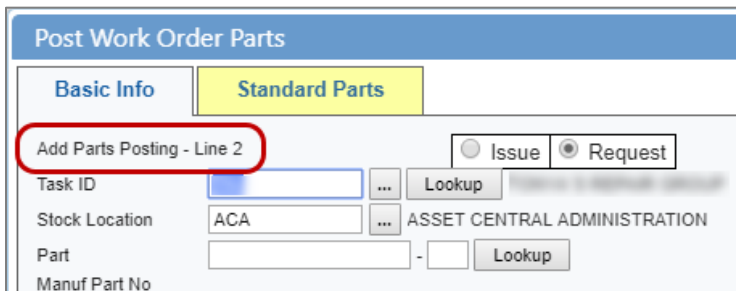
Comments

Undo Update ☐ Issue Together

Pending Parts Postings

	Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
☒	1		GRASSHOPPER SS-C138-0	KNIFE; THE GRASSHOPPER'S SIZE IS CLOSEST TO THAT OF A TRUE PENKNIFE WITH ITS BLADE OVER TWO-INCHES.	1.00			REQUEST

The information is updated for the line item in the Pending Parts Postings section and the Add Parts Posting – Line 2 area shows.



Post Work Order Parts

Basic Info Standard Parts

Add Parts Posting - Line 2 ☐ Issue ☒ Request

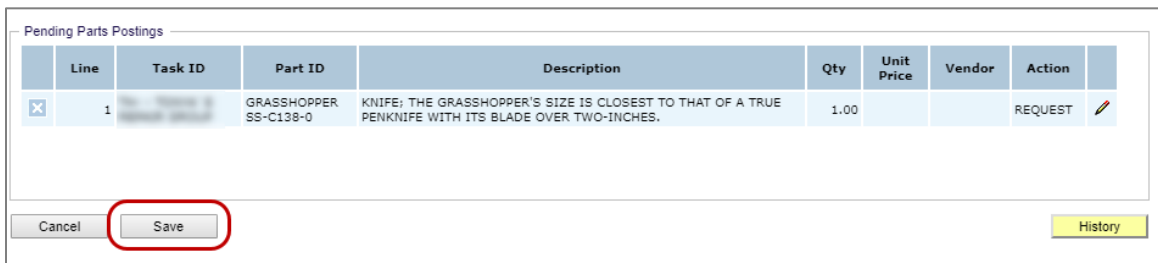
Task ID ... Lookup

Stock Location ACA ... ASSET CENTRAL ADMINISTRATION

Part - Lookup

Manuf Part No

- Continue adding parts issues/requests to the pending parts postings list.
- Click **Save** to save your issues/requests.



Pending Parts Postings

	Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
☒	1		GRASSHOPPER SS-C138-0	KNIFE; THE GRASSHOPPER'S SIZE IS CLOSEST TO THAT OF A TRUE PENKNIFE WITH ITS BLADE OVER TWO-INCHES.	1.00			REQUEST

Cancel Save History

 Click **Cancel** to cancel your unsaved changes. Clicking **IPC** 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. Refer to the [Parts History Pop-in](#) section details about this pop-in.

Part requests/issues are processed in batch. Each failed transaction, if any, is reported and you are given 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 – Issue/Request 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.

Issue Standard Parts

To issue parts using the **Standard Parts** tab of the Post Work Order Parts pop-in, follow the steps below.

1. Select the **Standard Parts** tab of the Post Work Order Parts pop-in.

Post Work Order Parts

Basic Info **Standard Parts**

Add Parts Posting - Line 2 ☐ Issue ☒ Request

Task ID ... Lookup

Stock Location ACA ... ASSET CENTRAL ADMINISTRATION

Part - Lookup

Manuf Part No

Qty Qty on Hand:

Date Required

Vendor ID ...

Vendor Contract ID ...

Account ID ...

Comments

Undo Add ☐ Issue Together

Service Request

WAC ...

Bin ...

Description

Manufacturer

Unit Price Core Value

NFI ☐ Est Unit Cost

Fail/Cause ID ...

Priority ID ...

Pending Parts Postings

	Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
	1		GRASSHOPPER SS-C138-0	KNIFE; THE GRASSHOPPER'S SIZE IS CLOSEST TO THAT OF A TRUE PENKNIFE WITH ITS BLADE OVER TWO-INCHES.	1.00			REQUEST

Cancel Save History

2. Complete the following fields:
 - **Issue Date** defaults to the last-entered date if previous pending postings exist, otherwise, this defaults to today's date. You may also select a date from the calendar.
 - **Stock Location** defaults to the last-entered location if previous pending postings exist, otherwise, this 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 issue and click the **Add as ISSUE** button.

Post Work Order Parts

Basic Info | **Standard Parts**

Issue Date: ☒ Default ☐ Custom 08/02/2019 02:36 PM

Stock Location: ACA ASSET CENTRAL ADMINISTRATION

WAC:

Notification	Task ID	Part ID	Manuf Part No	Manufacturer	Description
☒				SNAP ON	BLADE- WIPER; BLADE, WIPER, SIZE 26, WI COMPLETE WIT

Add as REQUEST Add as ISSUE

The part displays in the Pending Parts Postings section as an **ISSUE** action.

Pending Parts Postings

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1		GRASSHOPPER CC C190-2	KNIFE: THE GRASSHOPPER'S SIZE IS CLOSEST TO THAT OF A TRUE PENKNIFE WITH ITS BLADE OVER TWO INCHES	1.00			REQUEST
2			BLADE- WIPER; BLADE, WIPER, SIZE 26, WITHOUT ARM, RUBBER H.D. COMPLETE WIT	1.00	0.0000	1034379- 33003	ISSUE

Cancel Save History

4. Click **Save**. As indicated in the section below you may also click the red X to cancel the part issue or click the pencil 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 grey 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.

On the Work Order Details page, the Return Part icon shows next to issued parts as shown in the screenshot below.

	WAC	Qty	Unit Price	Total Cost
H.D.	02 - ADJUSTED	2.00	14.0000	30.80
Total:				30.80



Request Standard Parts

To request parts using the **Standard Parts** tab of the Post Work Order Parts pop-in, follow the steps below.

1. Select the **Standard Parts** tab of the Post Work Order Parts pop-in.

Post Work Order Parts

Basic Info **Standard Parts**

Add Parts Posting - Line 2 ☐ Issue ☒ Request

Task ID ... Lookup

Stock Location ... ASSET CENTRAL ADMINISTRATION

Part - Lookup

Manuf Part No

Qty Qty on Hand:

Date Required

Vendor ID ...

Vendor Contract ID ...

Account ID ...

Comments

Service Request

WAC ...

Bin ...

Description

Manufacturer

Unit Price Core Value

NFI ☐ Est Unit Cost

Fail/Cause ID ...

Priority ID ...

Undo Add ☐ Issue Together

Pending Parts Postings

	Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
X	1		GRASSHOPPER SS-C138-0	KNIFE; THE GRASSHOPPER'S SIZE IS CLOSEST TO THAT OF A TRUE PENKNIFE WITH ITS BLADE OVER TWO-INCHES.	1.00			REQUEST

Cancel Save History

2. Complete the following fields:
 - **Issue Date** defaults to the last-entered date if previous pending postings exist, otherwise, this defaults to today's date. You may also select a date from the calendar.
 - **Stock Location** defaults to the last-entered location if previous pending postings exist, otherwise this 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 **Add as REQUEST**.

Post Work Order Parts

Basic Info

Standard Parts

Issue Date

☒ Default
 ☐ Custom
 08/02/2019 02:56 PM

Stock Location

ACA

ASSET CENTRAL ADMINISTRATION

WAC

	Notification	Task ID	Part ID	Manuf Part No	Manufacturer	Description
☐		TH-	SRV-WIPER01-0	SRVWIPER001 Cross References: SRVWIPER001-0	SNAP ON	BLADE- WIPER; BLADE, WIPER, SIZE 26 COMPLETE WIT

Add as REQUEST

Add as ISSUE

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		WIPER01-0	BLADE- WIPER; BLADE, WIPER, SIZE 26, WITHOUT ARM, RUBBER H.D. COMPLETE WIT	1.00	0.0000	1034379- 33003	REQUEST	

Cancel

Save

History

4. Click **Save**.

When the requested part is a warrantable part, a dialog displays to remind you to save the old part for warranty. Click **OK** to continue.

You are returned to the Work Order Details page. The part request shows on the Work Order Details page as seen by the Pending Part Request icon in the screenshot below.

Labor

Parts

Cml

New Task

Remaining Hours: 38.00

WAC:

Remove Pending Part Issues/Requests

1. 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 08/02/2019 03:04 PM

Stock Location: ACA ASSET CENTRAL ADMINISTRATION

WAC:

Notification	Task ID	Part ID	Description	Qty
	TH-	WIPER01-0	BLADE- WIPER; BLADE, WIPER, SIZE 26, WITHOUT ARM, RUBBER H.D. COMPLETE WIT	1

10.1.105.33 says
Remove line 1?

OK Cancel

Add as REQUEST Add as ISSUE

Pending Parts Postings

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1	TH-	WIPER01-0	BLADE- WIPER; BLADE, WIPER, SIZE 26, WITHOUT ARM, RUBBER H.D. COMPLETE WIT	1.00	0.0000	1034379-33003	REQUEST

Cancel Save History

The line item displays with a strikethrough to indicate its removal.



Click the red X again to undo the deletion.

2. Click **Save** to post the remaining issues or returns to the work order or service request.

Pending Parts Postings

Line	Task ID	Part ID	Description	Qty	Unit Price	Vendor	Action
1	TH- TONYA'S REPAIR GROUP	SRV- WIPER01-0	BLADE- WIPER; BLADE, WIPER, SIZE 26, WITHOUT ARM, RUBBER H.D. COMPLETE WIT	1.00	0.0000	1034379-33003	REQUEST

Cancel **Save** History

Any saved issues and returns show on the Work Order Details page discussed in the next section.

Pending Part Requests and Return Part Icons

Pending Part Request Icon

The **Pending Part Request** icon opens the Part Requests pop-in to view pending part requests.

1. Click the Pending Part Request icon

LaborPartsCmlNew Task

Remaining Hours: 38.00

WAC:



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
08/02/2019 02:33 PM	WIPER01-0	WIPER001	SNAP ON	BLADE- WIPER; BLADE, WIPER, SIZE 26, WITHOUT ARM, RUBBER H.D. COMPLETE WIT	1			Cancel	479902

Cancel

 The pending part requests and partially received part requests show in the Parts Request pop-in.

- Click **Cancel** next to the Pending Part Request to cancel the request.

The following dialog box displays.

Cancel part request? WIPER01-0: BLADE- WIPER; BLADE, WIPER, SIZE 26, WITHOUT ARM, RUBBER H.D. COMPLETE WIT Qty: 1.00

OK

Cancel

- Click **OK** to cancel the part request.

The Part Request pop-in displays with the Part Request status showing **CANCELED**.

Closing the pop-in returns you to the Work Order Details Page.

Return Part Icon

The **Return Part** icon allows you to return a part.

To return a part:

1. Click the **Return Part**  icon.

		Total:		2.00	440.00
Manufacturer	Description	WAC	Qty	Unit Price	Total Cost
SNAP ON	BLADE- WIPER; BLADE, WIPER, SIZE 26, WITHOUT ARM, RUBBER H.D. COMPLETE WIT	02 - ADJUSTED	2.00	14.0000	30.80
				Total:	30.80

The Return issued part pop-in displays.

Return issued part

Task

REPAIR GROUP

Part

-WIPER01-0: BLADE- WIPER; BLADE, WIPER, SIZE 26, WITHOUT ARM, RUBBER H.D. COMPLETE WIT

WAC

02 - ADJUSTED

Position

Quantity Issued

2.00

Quantity Returned

0

NFI

N

Unit Price

\$14.0000

Issue Location

ACA - ASSET CENTRAL ADMINISTRATION

Employee

Comments

Qty to return

2.00

Reason

Date

08/02/2019 12:00 AM

Cancel

Return Part

2. Complete the **Qty to return** and **Reason** fields and click the **Return Part** button.

Return issued part

Task

REPAIR GROUP

Part

-WIPER01-0: BLADE- WIPER; BLADE, WIPER, SIZE 26, WITHOUT ARM, RUBBER H.D. COMPLETE WIT

WAC

02 - ADJUSTED

Position

Quantity Issued

2.00

Quantity Returned

0

NFI

N

Unit Price

\$14.0000

Issue Location

ACA - ASSET CENTRAL ADMINISTRATION

Employee

Comments

Qty to return

2.00

Reason

Date

08/02/2019 12:00 AM

Cancel

Return Part

The Work Order Details page displays the part return information in the Notes and Postings areas.

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. Commercial Work History can also be viewed by clicking the **History** button on this page. The button turns yellow to indicate commercial work history exists.

1. Click the **Cml (Commercial)** button (in the Service Request section or the Tasks not on Service Requests section) on the Work Order Details page, or the **Commercial** button on the Work Order Main page.

Work Order Postings	
Complaint	ip check - ip internet not check
Cause	ip check - ip check resolve
Correction	FIX SHUTOFF
Task	001 - ELECTRICAL SYSTEM

Work Order Details Page Cml Button

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

Work Order Main Page Commercial Work Button

When you click the **Cml** button, 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 Calendar						
Vendor Contract ID							
Labor Cost	\$ Taxable? ☐ Labor Hours						
Parts Cost	\$ Taxable? ☐						
Misc Cost	\$ Taxable? ☐						
Vendor Invoice	Invoice Date Calendar						
Account ID	SRV ACCOUNT TEST						
Fail/Cause ID							
Part ID	-						
Quantity Issued							
Repair Reason	J Lookup 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. 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.
 - **Vendor ID** defaults to the last vendor entered, if a previous pending line exists. Use the following information to choose a vendor if needed.
 - 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.



Note: If the Vendor Chooser option is enabled in the portal settings, clicking the chooser button for the **Vendor ID** field 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 Name Contains: This searches the Vendor Name field for the item.

Address Contains: This searches the Address Lines 1 through 4 for the vendor entry. The values entered must be on the same line. If a search is entered for Seattle, Washington, but Seattle is on Line 2 and Washington is on Line 3, the search will not find the information.

Vendor ID: This limits the vendor ID to the exact characters entered. Use the % wildcard for partial entries.

Task ID: This limits the task ID to the exact characters entered. 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** allows you to search for the vendor contract. This defaults to contracts and vendors available depending on the amount used and date (if the contract is or will be active during the date chosen).
- **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**
 - **Total Cost** updates as **Labor**, **Parts**, and **Misc costs** are entered.
 - **Vendor Invoice**
 - **Invoice Date** 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**
 - **Fail/Cause ID**
 - **Part ID**
 - **Description**
 - **Quantity Issued**
 - **Repair Reason**
 - **Comments**
4. After adding the information, click **Add**.

The commercial work shows in the Pending Commercial Postings section of the pop-in.

	Line	Task ID	Date	Vendor	Labor Cost	Parts Cost	Misc Cost
☐	1	043	09/29/2011	V-1000	50.00	39.99	2.39

Cancel Save

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 the Post Work Order Commercial Work pop-in show the Commercial Work.

Reversal Checkbox

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.

Post Work Order Commercial Work

Add Commercial Posting - Line 1

Service Request ID: [Dropdown] Post Request ☒ Reversal

Task ID: [Text] ... Lookup

WAC: [Text] ...

Vendor ID: [Text] ...

Date: [Date Picker]

Vendor Contract ID: [Text] ...

Labor Cost: \$100 Taxable? ☒ Labor Hours: 1

Parts Cost: \$ Taxable? ☐

Misc Cost: \$ Taxable? ☐

2. Complete the fields to reverse a cost and click **Add**.

Post Work Order Commercial Work

Add Commercial Posting - Line 1

Service Request ID: [Dropdown] Post Request ☒ Reversal

Task ID: [Text] ... Lookup

WAC: [Text] ...

Vendor ID: [Text] ...

Date: [Date Picker]

Vendor Contract ID: [Text] ...

Labor Cost: \$100 Taxable? ☒ Labor Hours: 1

Parts Cost: \$ Taxable? ☐

Misc Cost: \$ Taxable? ☐

Position: [Text] ...

Vendor Invoice: [Text]

Account ID: [Text] ...

Fail/Cause ID: [Text] ...

Part ID: [Text] - [Text] ...

Quantity Issued: [Text]

Repair Reason: [Text] ...

Comments: [Text Area]

Undo Add

Pending Commercial Work

The reversal posting shows in the Pending Commercial Postings list at the bottom of the pop-in.

3. Click **Save** to save the entry.

Quantity Issued

Repair Reason

...

Comments

Undo

Add

Pending Commercial Work

Line	Task ID	Date	Vendor	Labor Cost	Parts Cost	Misc Cost
Cancel Save						

The reversal shows on the Work Order Details page as a subtracted cost.

Task		001 - ELECTRICAL SYSTEM			
001 - ELECTRICAL SYSTEM		Remaining Hours: 0.00		WAC:	
001 - ELECTRICAL SYSTEM		Remaining Hours: 40.00		WAC:	
Commercial:					
Date	Vendor	Labor Cost	Parts Cost	Misc Cost	Total Cost
12/20/2019	76099-9938 - 020699924-ATLANTA	-117.12	0.00	0.00	-117.12
Total:		-117.12	0.00	0.00	-117.12

15. Work Order Task Page

The Work Order Task page displays after clicking the **View** button in the Tasks section on the Work Order Main page, by clicking the **Task Code** button on the Work Order Details page, and by clicking the **Task** link on the Work Order Details page.



The appearance of this page will differ based on your workflow. If you are on a part rebuild, you will only see Work Class, Est Hours, Comment, and Priority.



When viewing this page for a work order task with a location that is not supported by the current employee, the user's access will be restricted to view-only. This means they will not be allowed to make any changes to the page. This is only a case when the employee does not "Support All Locations" and the task's location is not in their list of supported locations.



Supervisors are the only users that can update the PM schedule (which displays only for a PM service/inspection). The **Post Standard Parts Only** checkbox, and **Update PM Schedule** drop-down display for PM services/inspections, and only displays for supervisors.

On this page, you may update task fields, post standard parts to task, enter Work Accomplished Codes (WAC), indicate final status, add account ID, add serial numbers for installed and removed parts, and add notes.



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 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** field that is applied to the tasks when finishing the work order.



Procedure Information is listed on this page if it is set in the GUI. This is also found on the Tasks Primary Information page and enter text in the 'Task Procedure information' field to have procedure information show.

Click the **Save** button to save your entries or click the **Back** button. You are returned to your originating page.

PM Checklist Page

Clicking the **PM Checklist icon** takes you to the **Work Order PM Checklist** page. This page displays the checklist of items associated with the specific PM or Inspection service. Items that failed show in the Work Order PM Checklist section and are indicated by the red warning triangle. A Delete column shows if you are working with an exception-based checklist. You can hide the top section with the blue  button next to the name **Work Order PM Checklist**.

Work Order PM Checklist Total Done: 3 of 5 

Asset ID: GI-PH-2020-0001: 2020 GILLIG PHANTOM1 BUS   

Work Order ID: SM-2020-152 

PM Checklist Items  Skill Type: ALL (DONE: 3 of 5) 

Edit Items 

☐	PM Task	Done	Technician	Failed	Not Applicable	Svc Rqst	Comments	Test Results	Skill Type	Sequence	Associated Work
ELECTRICAL (0 / 2)											
☐	A-10 - PM TASK A-10	☒	SYSADMIN 	☒	☐	☐	PM TASK A-10 EEEE	Test Results	ELECTRICIAN	20	Multiple (2)
☐	A-30 - PM TASK A-30	☒	SYSADMIN 	☒	☐	☐	AAAA	Test Results	ELECTRICIAN	40	
MECHANICAL (0 / 2)											
☐	A-20 - PM TASK A-20	☒	SYSADMIN 	☒	☐	☐		Test Results	MECHANIC	33	SM-2022-713
☐	A-40 - PM TASK A-40	☐		☒	☐	☐		Test Results		40	
Ungrouped (0 / 1)											
☐	A-50 - PM TASK A-50	☐		☐	☐	☐		Test Results	PAINTER	50	

Showing 5 records

Back



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



To add a PM checklist item to the list, use the Checklist Controls area. Choose the item in the Checklist Item field, and then click Add.

There are three PM Checklist icons, as described below:

- Blue Oil Can** : Completed items show greyed out and with test results if available as follows:

PM Checklist Items  Skill Type: ALL SKILL TYPES (DONE: 3 of 133) 											
Failed	Technician	Sequence	PM Task				Skill Type	Test Results	Not Applicable	Svc Rqst	
☐	AWEMP 	10	999-001 - CHECK THE BACK-UP ALARM OPERATION 				INSP	Test Results	☐	☐	
☐	AWEMP 	20	999-002 - CHECK AIR PRESSURE DROP 				INSP	Test Results	☐	☐	
☐	AWEMP 	30	999-003 - CHECK OPERATOR'S INSTRUMENTS; SWITCHES; AND TELLTALE LIGHTS 				INSP	Test Results	☐	☐	

- Yellow oil can** : Incomplete items show as below:

PM Checklist Items		Skill Type: ALL SKILL TYPES (DONE: 3 of 133)					
Failed	Technician	Sequence	PM Task	Skill Type	Test Results	Not Applicable	Svc Rqst
☐		1500	999-150 - CHECK TOE IN. TOE SHOULD BE 0 - 1/16 TOED IN.	INSP		☐	☐
☐		1510	999-151 - CHECK FOUR WHEEL ALIGNMENT.	INSP		☐	☐
☐		1520	999-152 - CHECK THE 24-VOLT GENERATOR OPERATION AT IDLE AND HIGH IDLE	INSP		☐	☐
☐		1530	999-153 - CHECK FOR GREEN LIGHT ON VOLTAGE EQUALIZER IN A/C COMPT.	INSP		☐	☐
☐		1540	999-154 - CLEAN BATTERIES; WIRE BRUSH TERMINALS AND BATTERY BOX	INSP		☐	☐
☐		1550	999-155 - CHECK THE CONDITION OF ALL: BATTERY BOXES; BATT HOLD DOWN:	INSP		☐	☐

- **Red alert** : The screenshot below shows a Work Order PM Checklist where an item has failed.

PM Checklist Items		Skill Type: ALL SKILL TYPES					
Delete	Failed	Technician	PM Task	Skill Type	Test Results	Svc Rqst	
☒	☒	AWEMP	999-005 - CHECK AIR PRESSURE EFFICIENCY AND FAST IDLE	INSP	Test Results		
☒	☒	AWEMP	999-011 - CHECK AMEREX FIRE AND/OR GAS DETECTION	INSP	Test Results	☒	

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.

Supervisors may also perform the following actions:

- To select the technician that performed the test (when the technician forgets to do so) select a technician from the Choice-list.
 - To generate a service request, check the **Svc Rqst** box.
 - Add comments in the Comments field, if desired, and click **Save**.
 - To print a hard-copy version of the PM checklist, click the **PM Checklist Report** link in the bottom right corner of the page.
-  **Tip:** If customizing this report, name it "PM Checklist Report" and be aware that the following case sensitive parameters are used in the report: WorkOrderLoc, WorkOrderYr, WorkOrderNo, and PMService.

16. Work Assignment Detail Page

When you click the **Assignments** button on the Work Orders gadget, or the Work Order Main, Work Order Management, and Work Order Details pages, the Work Order Assignment Detail page displays. This page provides detailed information about the employee/crew/vendor assignments to a specific work order.

Work Assignment Detail

Asset ID	LOC 11 NL: 2012 QA-01 QA-01-01 QA-FLEET-001 DESCRIPTION		
Station Location	QA-FULL-01 - QA FULL SRV LOCATION	Repair Location	QA-FULL-01 - QA FULL SRV LOCATION
Numeric 1	6		
Work Order ID	QA-FULL-01-2024-48	Job Status	OPEN
Job Type	REPAIR	WO Meter 1	0 MILES
Projected Completion Date	03/07/2024 15:26	Priority	02 - MED.PRIORITY - 3 DAYS

Assigned: 0

Assigned	Assigned to Work Order
----------	------------------------

Tasks: 1

	Task ID	Description	Est Hours	WAC
☐	1 QA	QA REPAIR GROUP	0.00	

Unassign Checked

Appointments: 0

Appointment	Hours	Employee
-------------	-------	----------

Edit Assignments

☐ Vendor
... View

☐ Crew
...

☐ Employee
... View

Work Order	Task	Posted Hrs
------------	------	------------

Basic Info

WORK ORDER

Service Status

Vendor

Contact Name

Phone

Email Address

Priority

Date Scheduled

Bay Scheduled

Shift Scheduled

Est Hours

Back

View Calendar

New Appointment

Print Work Order

Work Order Summary Information

The Work Order Summary Information section is at the top of the page. If your organization has the Enterprise Portal, you may click the Equipment ID link to open the Equipment screen. Clicking the Work Order ID link opens the Work Order Main page. See the [Work Order Main Page](#) section above for more information regarding this page.

View Calendar Button

The **View Calendar** button opens the Shop Calendar. Refer to the [Shop Calendar](#) section for information about using the calendar.

New Appointment Button

Click **New Appointment** to go to the Shop Calendar Appointment Details page to create a new appointment.

Refer to the [Creating an Event](#) section for more information about scheduling appointments and assignments.

Print Work Order Link

If configured in module settings, this link provides the ability to print work orders directly from the Work Assignment page.

Assigned and Edit Assignments Areas

On the Work Order Assignment Detail page, you can assign employees, crews, and vendors to work orders and tasks. Multiple crews can be assigned to one work order assignment. The Assigned area is broken into two areas. These areas are the work order assignment (area 1), and the task assignment area (area 2) as shown below.



Assigning a crew is an easy way to assign multiple employees at once to a work order or task. An employee can be assigned to one or more crews, and have an assigned primary crew and secondary crews.

The work order assignment area lists the employees or vendors assigned or scheduled to the work order. Hovering over the employee's name allows you to see the employee's skill set as shown in the following sample screenshot.

Click the contact card button next to the employee or vendor name to open the Employee Contact Card or Vendor Contact Card.

The task assignment area lists the tasks that are assigned to the work order and the employees (or vendors) that have been assigned to the specific tasks.



Note: A + sign displays next to each task if you have the Scheduler module. Click + to view the employees and vendors assigned to the individual tasks. The number to the left of the + indicates the total assignments for that task.

Assigned: 1

Assigned		Assigned to Work Order	
Unassign	Employee	[Link]	

Tasks: 2

	Task ID	Description	Est Hours	WAC
☐	1 001	ELECTRICAL SYSTEM	0.00	
		Employee Assigned to Task	Posted Hrs	Status
		[Link]	0.00	●
☐	1 TH-	REPAIR GROUP	40.00	

You may click the **Unassign** button to take an employee or vendor off the work order.

Clicking the employee (or vendor) link lists all the work order and associated task assignments for that employee (or vendor) in the Edit Assignments section.

Assigned: 1

Assigned		Assigned to Work Order	
Unassign	Employee	[Link]	

Tasks: 2

	Task ID	Description	Est Hours	WAC
☐	1 001	ELECTRICAL SYSTEM	0.00	
☐	1 TH-	REPAIR GROUP	40.00	

Edit Assignments: 3

☐ Vendor
☐ Crew
☒ Employee

Work Order	Task	Posted Hrs
2017 JEEP GRAND CHEROKEE==Meters: 1-0 MILES; 2-0 HOURS==JEEP GRAND CHEROKEE LIMITED		
1-2017-42	001	0
1-2017-42	ALL TASKS	0
1-2017-42	TH-	0

In addition to being able to view assignments, the Edit Assignments section allows you to assign a task or an entire work order to an employee, crew or vendor.

Edit Assignments

☐ Vendor
☐ Crew
☐ Employee

Work Order	Task	Posted Hrs
------------	------	------------

Edit Assignments Section

Assign a Vendor or Employee to a Task

Follow the steps below to assign a vendor to a task. Follow the same steps to assign an employee to a task.

1. Click the tasks checkbox.

- Click the Vendor radio button and enter the vendor.
- Click **To Task(s)**.

Assigned: 1

Assigned	Assigned to Work Order
Unassign	Employee

Tasks: 2

Task ID	Description	Est Hours	WAC
1 001	ELECTRICAL SYSTEM	0.00	
1	REPAIR GROUP	40.00	

Edit Assignments: 3

Vendor (selected) View

Crew View

Employee View

To Task(s) To WO

Work Order	Task	Posted Hrs
2017 JEEP GRAND CHEROKEE==Meters: 1-0 MILES; 2-0 HOURS==JEEP GRA		
1-2017-42	001	0
1-2017-42	ALL TASKS	0
1-2017-42		0

Basic Info WORK ORDER

The vendor is added to the list of task assignments as indicated when clicking the + (as well as clicking on the vendor link).

Assign a Vendor or Employee to a Work Order

Follow the steps below to assign a vendor to a work order. Use the same steps to assign an employee or crew to a work order.

- Click the Vendor radio button and enter the vendor.
- Click **To WO**.

Edit Assignments: 3

Vendor (selected) View

Crew View

Employee View

To Task(s) To WO

Work Order	Task	Posted Hrs
2017 JEEP GRAND CHEROKEE==Meters: 1-0 MILES; 2-0 HOURS==JEEP GRA		
1-2017-42	001	0
1-2017-42	ALL TASKS	0
1-2017-42		0

A message displays above the Assigned section to indicate a successful update. The vendor is assigned to all the tasks on the work order as indicated by the name listed in the Assigned section. In the Tasks area, the number of assignments to the task has also increased and the name is listed when the view is expanded by clicking the + button.



Note: The scrollbar on the right of the Tasks section allows you to see all the task assignments when multiple tasks and assignments exist.

Unassign a Vendor or Employee from a Work Order

- To remove a vendor or employee from a work order, click the **Unassign** button next to the employee or vendor in the Assigned section.

Assigned	Assigned to Work Order
Employee	0.00

Unassign

A dialog box displays and asks you to click **OK** to unassign the vendor (or employee) from all tasks (AND the work order) or click **Cancel** to only unassign from the work order.

Do you want to unassign [redacted] from all Task assignments? Click OK to unassign from all tasks or CANCEL to unassign from work order.

OK Cancel

2. Click **Cancel** to unassign the vendor (or employee) from the work order.

The vendor (or employee) is unassigned from the work order. However, the vendor (or employee) is still assigned to the tasks.

An **Unassign** button now appears in the task level to take the vendor (or employee) off the tasks if necessary.

Unassign a Vendor or Employee from a Task

To unassign a vendor or employee from a task, click the **Unassign** button next to the vendor or employee in the task list.

Task ID	Description	Est Hours	WAC
001	ELECTRICAL SYSTEM	0.00	

Employee Assigned to Task	Posted Hrs	Status
[redacted]	0.00	
[redacted]	0.00	

Unassign

Unassign Checked

The employee is no longer assigned to the selected task.

Unassign Multiple Employees or Vendors from Tasks

1. Place a check in the box to the left of the tasks.
2. Click the **Unassign Checked** button to remove all assignments from the tasks.

Tasks: 3

	Task ID	Description	Est Hours	WAC									
☒	2 001	ELECTRICAL SYSTEM	0.00										
<table border="1"> <thead> <tr> <th>Employee Assigned to Task</th> <th>Posted Hrs</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Unassign</td> <td>0.00</td> <td>●</td> </tr> <tr> <td></td> <td>0.00</td> <td>●</td> </tr> </tbody> </table>					Employee Assigned to Task	Posted Hrs	Status	Unassign	0.00	●		0.00	●
Employee Assigned to Task	Posted Hrs	Status											
Unassign	0.00	●											
	0.00	●											
☐	CNT	CN REPAIR GROUP	0.00										

Unassign Checked

The assignees are removed from the selected tasks and a **Successful Update** message displays above the Assigned section.

Unassign All Employees, Crews, and Vendors from All Tasks

To unassign all employees from all tasks:

1. Check the upper left box of the task list
2. Click the **Unassign Checked** button.



Note: This does not remove the technicians assigned to the work order.

Tasks: 3

	Task ID	Description	Est Hours	WAC									
☒	2 001	ELECTRICAL SYSTEM	0.00										
<table border="1"> <thead> <tr> <th>Employee Assigned to Task</th> <th>Posted Hrs</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Unassign</td> <td>0.00</td> <td>●</td> </tr> <tr> <td></td> <td>0.00</td> <td>●</td> </tr> </tbody> </table>					Employee Assigned to Task	Posted Hrs	Status	Unassign	0.00	●		0.00	●
Employee Assigned to Task	Posted Hrs	Status											
Unassign	0.00	●											
	0.00	●											
☒	CNT	CN REPAIR GROUP	0.00										

Unassign Checked

The tasks then display with no vendor, crew, or employee assignments.

Basic Info

The Basic Info section allows supervisors to update basic information for the work order or task.

Basic Info WORK ORDER

Service Status ...

Vendor ...

Contact Name ...

Phone

Email Address

Priority ... ROUTINE

Date Scheduled

Bay Scheduled ...

Shift Scheduled ...

Est Hours 40.00

To update basic information, follow the steps below.

1. Select the work order or task from the drop-down box.
2. Complete the fields.



Note: Not all fields are editable if a task is selected instead of a work order.

3. Click **Save** to save your entries.
4. Click **Back** to go back to the Work Order Main page. See the [Work Order Main Page](#) section above for more information regarding this page.

Appointments

The Appointments section shows the appointments scheduled for the work order.

Appointments: 1

Appointment	Hours	Employee
04/02/2010	5.00	001 -

Click **Back** to go back to the Work Order Main page.

17. Work Order Center

Current Working Location

Go to Work Order

Current Location 1 - OPS

Year 2019 No. Go

View Calendar

Work Orders: 8

Expand All

Collapse All

Tasks	Notifications	Jobbed on	WO Number	View / Edit Assignments	Assigned	Asset ID	Service Status	Type	PM Service	Maint. Class
			45	Assignments		0000001 - 2005 DETROIT DIESEL S50CNG == 3000 MILES ; 0 NONE == SERIES 50 DETROIT DIESEL GAS ENGINE		REPAIR		
+			3	Assignments		2012 HONDA&US CIVIC&US == 351 MILES ; 0 NONE == FUEL TESTING-LIMITING QTY		PM	A	
+			6	Assignments		RAILROAD - RAIL TRACK 2017		REPAIR		N/A
+			23	Assignments	Multiple (2)	- 2006 JEEP GRAND CHEROKEE==Meters: 1-20100 MILES; 2-200 HOURS==JEEP GRAND CHEROKEE		PM		
						2006				

Current Filter:

Back

New Work Order

Work Order Center

Service Request Screen

Review and Close WOs

The **Work Order Center** button is available on the Work Order Management page. The **Work Order Center** button is enabled only if your organization uses Enterprise Portal. Click **Work Order Center** to open the Work Order Center screen. This screen may be accessed whenever work order fields or functions not available in the Work Management Portals' New Work Order process are required.

Service Request Screen

Current Working Location

Go to Work Order

Current Location 1 - OPS

Year 2019 No. Go

View Calendar

Work Orders: 8

Expand All Collapse All

Tasks	Notifications	Jobbed on	WO Number	View / Edit Assignments	Assigned	Asset ID	Service Status	Type	PM Service	Maint. Class
			45	Assignments		0000001 - 2005 DETROIT DIESEL S50CNG == 3000 MILES ; 0 NONE == SERIES 50 DETROIT DIESEL GAS ENGINE		REPAIR		
+			3	Assignments		2012 HONDA&US CIVICS&US == 351 MILES ; 0 NONE == FUEL TESTING-LIMITING QTY		PM	A	
+			6	Assignments		RAILROAD - RAIL TRACK 2017		REPAIR		N/A
+			23	Assignments	Multiple (2)	- 2006 JEEP GRAND CHEROKEE==Meters: 1-20100 MILES; 2-200 HOURS==JEEP GRAND CHEROKEE		PM		
						2006 JEEP GRAND CHEROKEE				

Current Filter:

Back
New Work Order
Work Order Center
Service Request Screen
Review and Close WOs

The **Service Request Screen** button is enabled only if your organization uses the Enterprise Portal. After clicking the **Service Request Screen** button, you are taken to the Service Requests/Defects screen.

Work Order Review/Closing Page

Clicking the **Review and Close WOs** button on the Work Order Management page opens the Work Order Review/Closing page. Supervisors can use the Work Order Review page to review and close out finished work orders.

+

23

Assignments

Multiple (2)

- 2006 JEEP GRAND CHEROKEE==Meters: 1-20100 MILES; 2-200 HOURS==JEEP GRAND CHEROKEE

PM

Current Filter:

Back
New Work Order
Work Order Center
Service Request Screen
Review and Close WOs

Review and Close Work Orders

Current Location: 1 - OPS

Finished Work Orders: 2

Notifications	Work Order ID	Asset ID	Service Status	Type	PM Service	Repair Reason
	1-2017-2	1997 CHEVROLET BLAZER==Meters: 1-0 MILES; 2-0	DOWN	REPAIR		C
	1-2017-37	2006 JEEP GRAND CHEROKEE==Meters: 1-20100		PM		

Current Filter:

No filter defined.

Back
Work Order Management
New Work Order
Begin Detail Review

Current Location

Use the **Current Location** drop-down to select the location to view finished work orders.

Finished Work Orders

The **Finished Work Orders** section lists all the finished work orders for the selected shop. Sort the columns by clicking on the column titles.

The **Notifications** column displays if pending part requests or pending parts exist for a given work order. For more information on the Notifications that are viewable in this column, refer to the [Notifications Column](#) section.

Clicking on specific **Work Order IDs** on the Work Order Review/Closing page takes you to the Work Order Details page to view the selected work order details prior to closing. See the [Work Order Details Page](#) section for more information about this page.

Current Filter

The **Current Filter** section allows you to define a filter to search and display certain finished work orders.



Note: Linear asset information and fields are not displayed if there are no linear assets defined in the system.

Define Filter

Record Type Quick Filter:

Asset Filters

Saved Asset Filter

Asset Type

Equipment ID

Equipment Type

Service Status

Maint. Class

Asset Category

Rebuild Part ID

Rebuild Part Suffix

Station Location

Department ID

Segment ID

Work Order Filters

Repair reason ID

PM Service

Priority ID

Has Task

Job type

Has Pending Requests

Is Multi-asset

Click **Define Filter** to open the Define Filter page. On this page, you may set the filter to display finished work orders.

Asset Filters include the following:

- Asset Type (all asset types, asset, component, linear, rail, stationary, inventory rebuild)
- Equipment ID
- Equipment Type
- Service Status
- Maint. Class
- Asset Category
- Rebuild Part ID
- Rebuild Part Suffix
- Station Location
- Department ID
- Segment ID

Work Order Filters include:

- Repair reason ID
- PM Service
- Priority ID
- Has Task
- Job type (PM, REPAIR)
- Has Pending Requests (YES, NO)
- Is Multi-asset (YES, NO)

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Other Buttons

The following buttons are available on the bottom of the page.

- The **Back** button takes you back to the Work Order Management page.
- The **Begin Detail Review** button opens the Work Order Details page where you may view the entire list of finished work orders, one at a time, in detail. This page allows supervisors to close and approve, edit, and reopen work orders. Refer to the [Work Order Details Page](#) section for more information about this page.



The **New Work Order** button takes you to the initial New Work Order page. See the [New Work Orders](#) section for more information about this page.

The **Work Order Management** button takes you to the Work Order Management page. See the [Work Order Management Page](#) section for more information about this page.

18. Add Work Order Tasks Pop-In

Click the **New Task** or **Select** buttons on the Work Order Main page, or the **New Task** button on the Work Order Details page to open the Add Work Order Tasks pop-in. This pop-in is where supervisors may add new tasks to the service request and/or work order.

Add a Task to the Work Order

Follow the steps below to add a new task to the work order.

1. Perform one of the two following steps:
 - i. Click the **New Task** button in the Tasks section of the Work Order Main page.

The screenshot shows the 'Work Order Main' interface. At the top, there's a header bar with the title 'Work Order Main'. Below it, a form displays various work order details: Asset ID (0000001), Asset Number (ABC), Operator Name, Work Order ID (1-2019-45), Job Type (REPAIR), W/O Meter 1 (0 MILES), Projected Completion Date (12/24/2019 09:49), Priority (3 - ROUTINE), Repair Location, Job Status (OPEN), Service Status (SS-001 - SERVICE STATUS 001), Contact Name, and Contact Email. To the right of these details is a table for 'Tech ID', 'Tech Name', and 'Task', which currently shows 'No employees currently working'. Below the details, there's a 'Tasks: 0' section with a table header including 'Task ID', 'WAC', and 'Remaining Hours'. A 'New Task' button is highlighted with a red circle in this section. To the right of the tasks table is an 'Actions' panel with buttons for 'Main Page', 'Finish Work Order', 'Equipment History', 'Messages' (highlighted), 'Commercial Work', 'Start Delay', 'Part Actions', 'Test Results', 'Print Work Order', 'View/Edit Detail', 'Related Files', 'Component Warranty', and 'Relationships'. Below the actions is a 'Notes' section with a 'New Note' button, and a 'Title and Comments' section with input fields for 'Title' and 'Comments'.

- ii. Click the **New Task** button in the Tasks not on Service Requests section of the Work Order Details page.

The screenshot shows the 'Work Order Postings' interface. At the top, there's a header bar with the title 'Work Order Postings'. Below it, there's a 'Tasks' section with tabs for 'Labor', 'Parts', 'Cml', and 'New Task' (highlighted with a red circle). Below the tasks section is a 'Task Summary' table with columns: Task Code, Description, WAC, Repair Reason, Priority, Work Class, Est Hours, Update PM Schedule, and Equi War. The table is currently empty.

The Add Work Order Tasks pop-in displays with several tabs displayed (depending on data conditions).

1-2019-45 -- Add Work Order Tasks

Repair Tasks PM Services Inspections Standard Jobs Task Search

Jump to

Task ID	Description
-BX	REPAIR GROUP SUPPS
000	PM TASKS
001	ELECTRICAL SYSTEM
002	ENGINE
003	FUEL SYSTEM
004	COOLING SYSTEM
005	TRANSMISSION
006	BRAKES
007	A/D SYSTEM

Pending Tasks: 0

Task ID	Description
---------	-------------

Cancel Save

The following sections provide steps to add a task to the work order based on the tab you use.

Repair Tasks Tab

From the **Repair Tasks** tab, you may add a repair task by following the steps below.

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.

1-2019-45 -- Add Work Order Tasks

Repair Tasks | PM Services | Inspections | Standard Jobs | Task Search

Jump to:

Task ID	Description
-BX	BRYAN REPAIR GROUP SUPPS ALL
000	PM TASKS
001	ELECTRICAL SYSTEM
002	ENGINE
003	FUEL SYSTEM
004	COOLING SYSTEM
005	TRANSMISSION
006	BRAKES
007	AIR SYSTEM

Task ID	Description
001	ELECTRICAL SYSTEM
001-000	ELECTRICAL - TROUBLESHOOT ELECTRICAL SYSTEM
001-101	ELECTRICAL - CLAMPS / TERMINALS / TIES
001-102	ELECTRICAL - NUTS / BOLTS
001-103	ELECTRICAL - HORN / HORN CIRCUIT
001-104	ELECTRICAL - WIRING HARNESS

Task ID	Description
001-000	ELECTRICAL - TROUBLESHOOT ELECTRICAL SYSTEM
001-000-000	ELECTRICAL - TROUBLESHOOT ELECTRICAL SYSTEM
001-000-0000	ELECTRICAL SYSTEM - TROUBLESHOOT - ISSUE FOUND

Pending Tasks: 2

Task ID	Description
001-000-0000	ELECTRICAL SYSTEM - TROUBLESHOOT - ISSUE FOUND
001-104	ELECTRICAL - WIRING HARNESS

Cancel Save

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.

Pending Tasks: 2

Task ID	Description
001-000-0000	ELECTRICAL SYSTEM - TROUBLESHOOT - ISSUE FOUND
001-104	ELECTRICAL - WIRING HARNESS

Cancel Save



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 **Save** 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 the Work Order Main page.

PM Services Tab

Use the **PM Services** tab, you may add a PM service by following the steps below.

1-2019-45 -- Add Work Order Tasks

Repair Tasks | **PM Services** | Inspections | Standard Jobs | Task Search

Task ID	Description
08-2020	DATE FORMAT TASK ID
A	PM SERVICE A
A - EXC	PM SERVICE A
A-SHORT	PM SERVICE A - SHORT
A-SHORT - EX	PM SERVICE A - SHORT - EXCEPTION BASED
AF	PM SERVICE A
B	PM SERVICE B
BRAKE PIT	WEEKLY BRAKE PIT INSPECTION
BUS - 3KOIL	3000 MILE OIL CHANGE FOR ORION DIESELS
BUS - 3YP	3 YEAR PAINT

Pending Tasks: 2

Task ID	Description
001-000-0000	ELECTRICAL SYSTEM - TROUBLESHOOT - ISSUE FOUND
001-104	ELECTRICAL - WIRING HARNESS

Cancel Save

1. Click the **PM Service Task ID** to select the desired PM Service.

1-2019-45 -- Add Work Order Tasks

Repair Tasks | **PM Services** | Inspections | Standard Jobs | Task Search

Task ID	Description
08-2020	DATE FORMAT TASK ID
A	PM SERVICE A
A - EXC	PM SERVICE A
A-SHORT	PM SERVICE A - SHORT
A-SHORT - EX	PM SERVICE A - SHORT - EXCEPTION BASED
AF	PM SERVICE A
B	PM SERVICE B

2. The PM Service displays in the **Pending Tasks** list.

1-2019-45 -- Add Work Order Tasks

Repair Tasks | **PM Services** | Inspections | Standard Jobs | Task Search

Task ID	Description
08-2020	DATE FORMAT TASK ID
A	PM SERVICE A
A - EXC	PM SERVICE A
A-SHORT	PM SERVICE A - SHORT
A-SHORT - EX	PM SERVICE A - SHORT - EXCEPTION BASED
AF	PM SERVICE A
B	PM SERVICE B

Pending Tasks: 3

Task ID	Description
001-000-0000	ELECTRICAL SYSTEM - TROUBLESHOOT - ISSUE FOUND
001-104	ELECTRICAL - WIRING HARNESS
A - EXC	PM SERVICE A

Cancel Save

 **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.

- Click **Save** to add the task to the list.

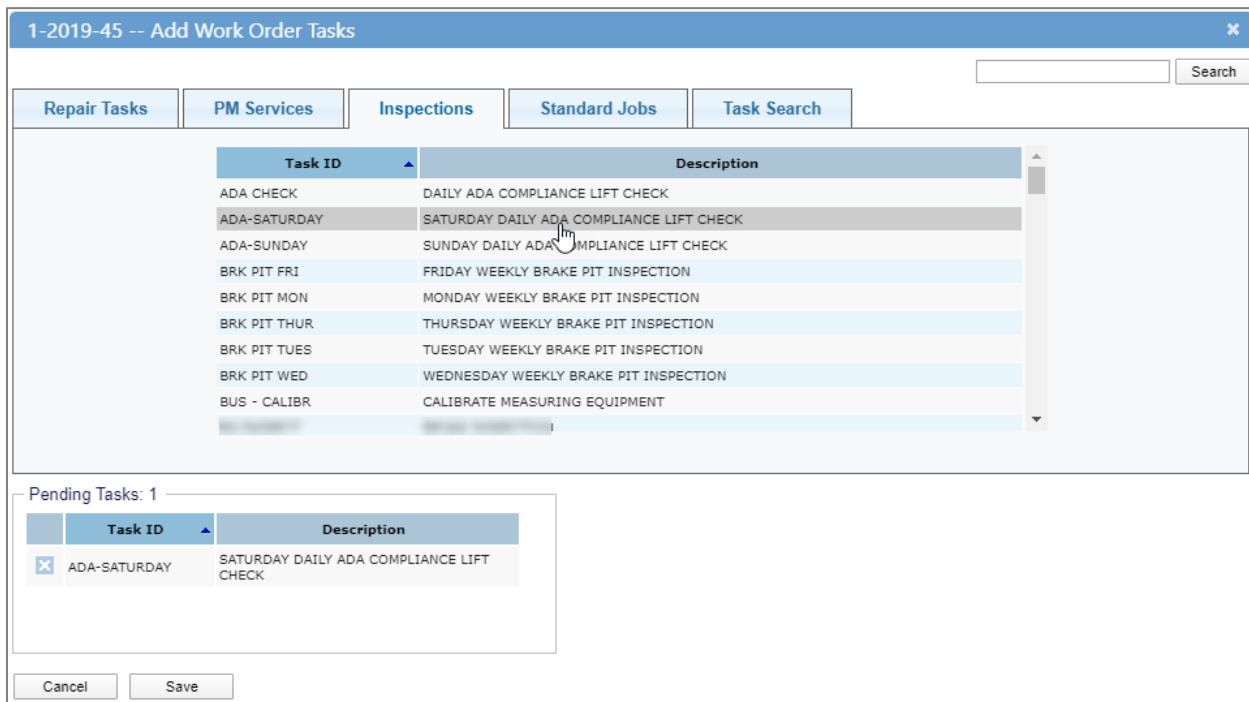
The PM Service displays in the Existing Tasks list on the Work Order Task Selector page.

- 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 page.

Inspections Tab

From the **Inspections** tab, may add an inspection task by following the steps below.



1-2019-45 -- Add Work Order Tasks

Repair Tasks PM Services **Inspections** Standard Jobs Task Search

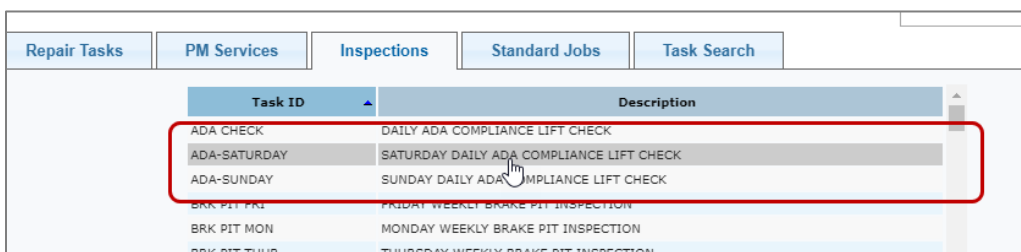
Task ID	Description
ADA CHECK	DAILY ADA COMPLIANCE LIFT CHECK
ADA-SATURDAY	SATURDAY DAILY ADA COMPLIANCE LIFT CHECK
ADA-SUNDAY	SUNDAY DAILY ADA COMPLIANCE LIFT CHECK
BRK PIT FRI	FRIDAY WEEKLY BRAKE PIT INSPECTION
BRK PIT MON	MONDAY WEEKLY BRAKE PIT INSPECTION
BRK PIT THUR	THURSDAY WEEKLY BRAKE PIT INSPECTION
BRK PIT TUES	TUESDAY WEEKLY BRAKE PIT INSPECTION
BRK PIT WED	WEDNESDAY WEEKLY BRAKE PIT INSPECTION
BUS - CALIBR	CALIBRATE MEASURING EQUIPMENT

Pending Tasks: 1

Task ID	Description
X ADA-SATURDAY	SATURDAY DAILY ADA COMPLIANCE LIFT CHECK

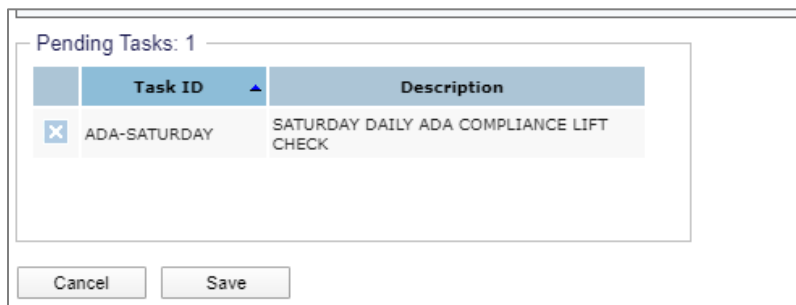
Cancel Save

- Click the **Task ID** to select the desired inspection.



Task ID	Description
ADA CHECK	DAILY ADA COMPLIANCE LIFT CHECK
ADA-SATURDAY	SATURDAY DAILY ADA COMPLIANCE LIFT CHECK
ADA-SUNDAY	SUNDAY DAILY ADA COMPLIANCE LIFT CHECK
BRK PIT FRI	FRIDAY WEEKLY BRAKE PIT INSPECTION
BRK PIT MON	MONDAY WEEKLY BRAKE PIT INSPECTION
BRK PIT THUR	THURSDAY WEEKLY BRAKE PIT INSPECTION

- The inspection displays in the **Pending Tasks** list.



Pending Tasks: 1

	Task ID ▲	Description
X	ADA-SATURDAY	SATURDAY DAILY ADA COMPLIANCE LIFT CHECK

Cancel Save

 **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.

- Click **Save** to add the task to the list.

The Inspection displays in the Existing Tasks list on the Work Order Task Selector page.

- Click the **Add Task** button to add another task or click **Back** to go back to the Work Order Main page.

The inspection now shows on both the Work Order Main page.

Standard Jobs Tab

From the **Standard Jobs** tab, add a standard job (which usually includes more than one task) by following the steps below.

1-2019-45 -- Add Work Order Tasks

Repair Tasks PM Services Inspections **Standard Jobs** Task Search

Tasks on Standard Job
BUS - PREPARE FOR PAINT - PREPARE VEHICLE FOR PAINT JOB

Standard Job	Description	Task ID	Description
ANOTHERSIMPLESTANDARDJOB	ANOTHER SIMPLE STANDARD JOB	001-303	ELECTRICAL - EXTERIOR BULBS & ASSEMBLIES
BUS - PREPARE FOR PAINT	PREPARE VEHICLE FOR PAINT JOB	001-305	ELECTRICAL - TURN & HAZARD SIGNALS
JM-STANDARD-JOB	JOSH'S STANDARD JOB, FOR ALL CLASSES	013-105	EXTERIOR - WIPER ARM / BLADE
QA-SJ-01	QA STANDARD JOB - FIRST 5 TASKS	013-113	EXTERIOR - PANEL
QA-SJ-02	QA STANDARD JOB - LAST 5 TASKS	013-121	EXTERIOR - DECALS
REPLACE LIGHT BULB	UNSCREW THE OLD BULB AND REPLACE WITH A SHINY NEW ONE	013-122	EXTERIOR - SAND PANELS
		013-123	EXTERIOR - ACCESS DOOR SHOCKS / HINGES

Add Standard Job

Pending Tasks: 1

Task ID	Description
ADA-SATURDAY	SATURDAY DAILY ADA COMPLIANCE LIFT CHECK

Cancel Save

1. Click the standard job.

Repair Tasks PM Services Inspections **Standard Jobs** Task Search

Tasks on Standard Job
BUS - PREPARE FOR PAINT - PREPARE VEHICLE FOR PAINT JOB

Standard Job	Description	Task ID	Description
ANOTHERSIMPLESTANDARDJOB	ANOTHER SIMPLE STANDARD JOB	001-303	ELECTRICAL - EXTERIOR BULBS & ASSEMBLIES
BUS - PREPARE FOR PAINT	PREPARE VEHICLE FOR PAINT JOB	001-305	ELECTRICAL - TURN & HAZARD SIGNALS
JM-STANDARD-JOB	JOSH'S STANDARD JOB, FOR ALL CLASSES	013-105	EXTERIOR - WIPER ARM / BLADE
QA-SJ-01	QA STANDARD JOB - FIRST 5 TASKS	013-113	EXTERIOR - PANEL
QA-SJ-02	QA STANDARD JOB - LAST 5 TASKS	013-121	EXTERIOR - DECALS
REPLACE LIGHT BULB	UNSCREW THE OLD BULB AND REPLACE WITH A SHINY NEW ONE	013-122	EXTERIOR - SAND PANELS

The tasks on standard job display.

2. Click **Add Standard Job**.

5 TASKS >	013-113	EXTERIOR - PANEL
5 TASKS >	013-121	EXTERIOR - DECALS
>	013-122	EXTERIOR - SAND PANELS
>	013-123	EXTERIOR - ACCESS DOOR SHOCKS / HINGES

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 **Save** to add the tasks to the list.

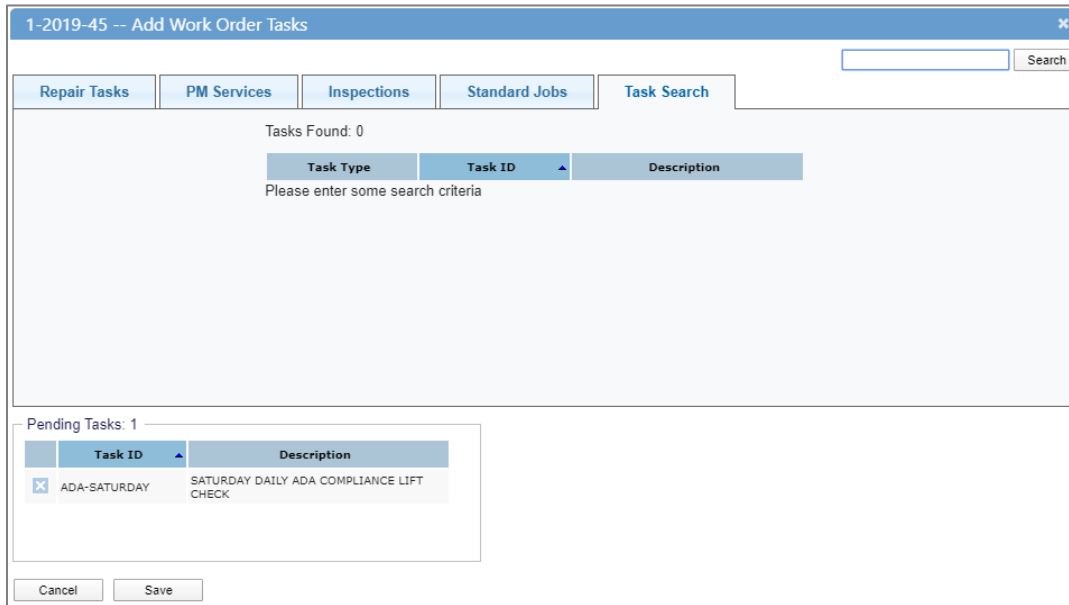
The Standard Job tasks display in the Existing Tasks list on the Work Order Task Selector page.

4. 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 the Work Order Main page.

Task Search Tab

From the **Task Search** tab, search for a task by following the steps below.



Task Type	Task ID	Description
Please enter some search criteria		

Pending Tasks: 1	
Task ID	Description
ADA-SATURDAY	SATURDAY DAILY ADA COMPLIANCE LIFT CHECK

1. In the top-right corner of the screen enter a keyword or part of the description in the search field.
2. Click **Search** to search for and displays all tasks that meet the criteria.
3. Click on the specific task or service to add to the list of tasks related to the work order.
4. The task or service 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 **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 Work Order Main page.

The standard job tasks now show on the Work Order Main page.

Add a Task to a Service Request

Tasks may be added to work order-linked service requests to explain the steps taken to resolve the complaint or repair.

To add a new task to the service request:



Adding a new task to the service request also adds the task to the work order.

1. Initiate the task selector process by clicking the specified button on one of the following pages:
 - i. On the Work Order Main page, click **Select** in the **Service Request/Defects** list.

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

Add / Manage

- ii. Click the **Add Task** button on the Work Order Task Selector page for a service request as shown in the screenshot below.

Work Order Task Selector

Asset ID: 7897894569 2006 CHEVROLET BLAZER RED BLAZIN FIRE

Asset Number: [REDACTED] Station Location: ABA - 2 ASSET CENTRAL ADMINISTRATION

License Number: [REDACTED] Repair Location: ABA - 2 ASSET CENTRAL ADMINISTRATION

Work Order ID: 1-2015-5 Job Status: OPEN

Title: [REDACTED] 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

Existing Tasks: 4

	Task	Description	WAC	Location
View	001	ELECTRICAL SYSTEM		1 - OPS
View	CNINSPECT001	INSPECTION 001		1 - OPS
View	CNTASK005	TASK 005 - ALWAYS ON REPAIR WORK ORDERS / PM WORK ORDERS		1 - OPS
View	[REDACTED]	[REDACTED]		1 - OPS

[Back](#) [Add Task](#)



Clicking the **Select Repair Group** button also opens the Task Selector process, with the current Repair Group already selected.

- iii. Click **New Task** in the Service Request area on the Work Order Details page.

Complaint CN-SYMPOM-001 - DESCRIPTION: SYMPTOM 001 [Edit](#) [Labor](#)

[New Task](#) [Parts](#) [Cml](#)

Complaint QA-SYMP-CRACK - QA SYMPTOM FOR CRACK [Edit](#) [Labor](#)

Cause QA-CRACK - QA CRACK FAILURE [New Task](#) [Parts](#) [Cml](#)

Correction FIX SHUTOFF

Task 001 - ELECTRICAL SYSTEM

In all of the cases mentioned above, the Task Selector pop-in displays with several tabs displayed (depending on data conditions).

1-2015-5 - Add Work Order Tasks

Complaint SYMP-CRACK - SYMPTOM FOR CRACK

Cause -CRACK - CRACK FAILURE

SR Repair Task 001 - ELECTRICAL SYSTEM

[Repair Tasks](#) [PM Services](#) [Inspections](#) [Standard Jobs](#) [Task Search](#) [Supported Tasks](#)

Task ID	Description
-01	TASK
-01-01	COMP WARR TASK
-01-02	COMP WARR TASK NEVER UNDER WARRANTY

Pending Tasks: 0

Task ID	Description
---------	-------------

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

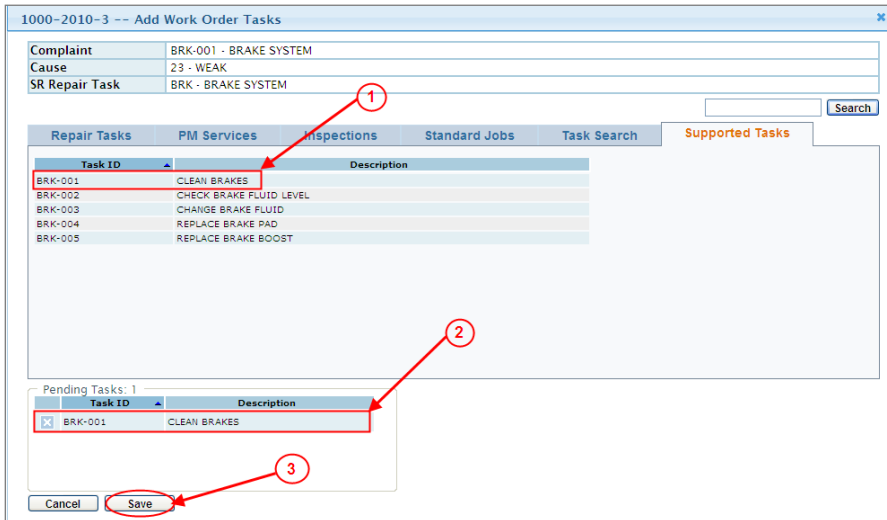
The tab procedures are the same whether adding tasks to service requests or adding tasks to work orders. Follow the tab-specific instructions listed above in the [To Add a Task to a Work Order](#) section to add a task to the service request.

 The **Supported Tasks** tab shows **ONLY** for service requests with defined supported tasks. Follow the steps below to add a supported task to a service request.

Supported Tasks Tab (Service Requests Only)

The **Supported Tasks** tab displays 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 in the Symptom page's Supported Tasks area.

From the **Supported Tasks** tab, you may add a supported task to the service request by following the steps below.



To add a supported task:

1. Click the supported task to select it.

*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.

2. Click **Save** to add the task to the list.

*The task displays on the **Work Order Details** and **Work Order Main** pages.*

19. Work Order Service Requests Page

Click the **Add/Manage SRs** button on the Work Order Main or Work Order Details pages to open the Work Order Service Requests page. This page shows both unassigned service requests as well as service requests that are assigned to the work order.

Contact Phone	WORK PHONE	Projected Completion Date	02/19/2019 13:13	Relationships Files Test Results Equipment Usage Add / Manage SRs Work Order Tasks
Contact Email	email address	Priority	1 - EMERGENCY/IMMEDIATE	
Repair Reason ID	1 - REASON 1 - BASIC	Work Class	6 - HANDHELD WORK ORDER	
Account ID		Parking Stall		
Priority ID	1 - EMERGENCY/IMMEDIATE	Reference Order ID		
Summary Cost Info				

Work Order Service Requests						
Asset ID	EQUIP-000: 2000 MANU-000 MODEL-000 FLEET EQUIPMENT 000					
Asset Number	67890	Station Location				
Repair Location		Operator Name				
Operator Phone	WORK PHONE					
Work Order ID	LOC-2019-586	Job Status	OPEN			
Job Type	REPAIR	Technician				
WO Meter 1	114 HOURS	Contact Name				
Contact Phone	WORK PHONE	Projected Completion Date	02/19/2019 13:13			
Contact Email	email address	Priority	1 - EMERGENCY/IMMEDIATE			
Unassigned Service Requests: 0						
☐	Task	Symptom	Repair Reason	Entered When	Entered By	Priority
Assign Checked SRs						
Back New Service Request						

On this page, you may assign, unassign, or create service requests.

Service requests represent work activities that are currently in the equipment ID's to-do list, and 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.

Assign a Service Request

To assign a service request:

1. Check the box next to the service request you wish to assign. Checking the box at the top left corner automatically checks all the boxes to assign all the service requests listed.

Unassigned Service Requests: 1				
☐	Task	Symptom	Repair Reason	Entered When
☒		SYMPTOM - DESCRIPTION OF SYMPTOM		08/20/2019 14:11
	-MARKER-48000 +23.4567			
	No Comment			
Assign Checked SRs				

2. Click **Assign Checked SRs** to assign the service requests to the work order.

Unassigned Service Requests: 1				
☐	Task	Symptom	Repair Reason	Entered When
☒		SYMPTOM - DESCRIPTION OF SYMPTOM		08/20/2019 14:11
	-MARKER-48000 +23.4567			
	No Comment			
Assign Checked SRs				
Assigned Service Requests: 0				

The Service Request is listed in the Assigned Service Requests section.

Assigned Service Requests: 1					
☐	Task	Symptom	Repair Reason	Entered When	Entered By
☒		SYMPTOM - DESCRIPTION OF SYMPTOM		08/20/2019 14:11	
	-MARKER-48000 +23.4567				
	No Comment				
Unassign Checked SRs					

Unassign a Service Request

-  Service requests can only be assigned from a work order if nobody is jobbed onto the service request, and if there are zero postings (in CML_MAIN, LAB_MAIN, and PTD_MAIN), and zero part requests for any task related in *any way* to the service request (even if the posting/request is not specifically against the service request).

To unassign a service request:

1. 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.

Assigned Service Requests: 1				
☐	Task	Symptom	Repair Reason	Entered When
☒		SYMPTOM - DESCRIPTION OF SYMPTOM		08/20/2019 14:11
No Comment				

2. Click on the **Unassign Checked SRs** button to unassign the service requests.

Assigned Service Requests: 1				
☐	Task	Symptom	Repair Reason	Entered When
☒		SYMPTOM - DESCRIPTION OF SYMPTOM		08/20/2019 14:11
No Comment				

Unassign Checked SRs

The Service Request is listed in the Unassigned Service Request section.

Unassigned Service Requests: 1				
☐	Task	Symptom	Repair Reason	Entered When
☒		SYMPTOM - DESCRIPTION OF SYMPTOM		08/20/2019 14:11
No Comment				

New Service Request Button

 To create a new service request, click the **New Service Request** button.

A blank Service Request/Defect page opens where you can create a new service request by completing the fields. Refer to the [View/Edit Service Requests](#) section above for an overview of this page.

20. Finish Incomplete Work Orders Page

If there are items that must be completed prior to finishing the work order, the Finish Incomplete Work Orders page opens once you click the **Finish Work Order** button on the Work Order Main page.

Home Supervisor Admin Logout

Finish Work Order

Equipment ID CNCAR001: SN-CNCAR001 2002 CHEVROLET CHEVY
LIGHT TRU BLACK ABC-CA

Asset Number AN-CNCAR001 Station Location License Number ABC

Work Order ID CNLOC1-2006-14

The following items must be completed:

Incomplete Task(s) on Service Request CNCAR001-1509
Incomplete Task A-

Meter Info

Meter 1 300 Meter 1 validation

Meter 2 10 Meter 2 validation

Cancel

This page lets you review items pending to complete the work order. To complete a linked item, click on the link related to the item (in the example above, click on the “Service Request LMMPCAR4-3” link to complete the service request). Complete the pages. Once all items are complete, a **Continue** button displays. Clicking the **Continue** button takes you to the [Work Order Details Page](#) as described above. On the Work Order Details page, you may click the **Finish WO** button to finish the work order.

21. Parts History Pop-in

To use the Parts History pop-in:

- To open the Parts History pop-in, click one of the following:
 - The **Pending Part Requests**  icon on the Work Order Management page
 - The **Parts Ready**  icon on the Work Order Details page
 - The **History** button on the Post Work Order Parts pop-in.

		3	Assignments		HFM
		6	Assignments		
	 1 pending part request(s)	41	Assignments	Multiple (2)	

The Parts History pop-in displays.

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 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.



Note: 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 **+** and or **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, FLEXIBLE CORPORATI	003-000 - TROUBLESHOOT FUEL SYSTEM	5
 			

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 display 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 - PM-A	1	ORDERED	
01/10/2012 13:30	P-1000-0	OIL FILTER; OIL F				
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:	

- Scroll to the right of the Parts Requested section to see the request ID.
- Continue to the following sections for information on canceling part requests and returning issued parts.

Cancel Part Requests



Follow the instructions below 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	Manuf Part No	Manufacturer	Description	Status	Qty	Task	Priority ID	Action	Request
03/24/2017 12:44	SRV-WIPER01-0	SRVWIPER001	SNAP ON	BLADE- WIPER; BLADE, WIPER, SIZE 26, WITHOUT ARM, RUBBER H.D. COMPLETE WIT	PENDING	1	CNT - CN REPAIR GROUP			476743

A dialog box displays to verify that you want to cancel the part request.

Cancel part request? **WIPER; BLADE, WIPER, SIZE 26, WITHOUT ARM, RUBBER H.D. COMPLETE WIT** Qty: 1.00

OK Cancel

- 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 supervisor approval.

Return Issued Parts (No Approval Required)

To return issued (posted) parts to inventory where approval is not required:

- On the **Parts History** pop-in, click the **+** or **Expand All** button to see the issued parts details.

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
------	---------	-------------	--------	-----	------	-------------	--------	---------

- 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

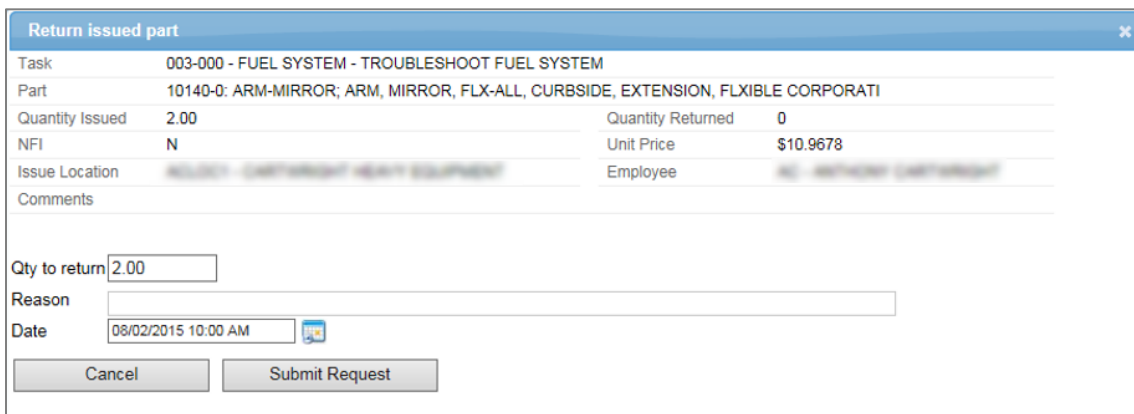
Issue Qty: 2.00 EACH Date Posted: 08/03/2015 12:38 PM WAC: Employee: Position:

Issue Location: Issue Qty: 2.00 EACH Date Posted: 08/03/2015 12:36 PM WAC: Employee: Position:

Return

Qty Returned	Date	Employee	Status	Reason
--------------	------	----------	--------	--------

You are taken to the Return Issued Part pop-in.



The 'Return issued part' pop-in form contains the following fields and controls:

- 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:** SELECT CURRENT PART EQUIPMENT
- Employee:** SELECT CURRENT EMPLOYEE
- Comments:** (text area)
- Qty to return:** Input field with value 2.00
- Reason:** Input field
- Date:** Input field with value 08/02/2015 10:00 AM and a calendar icon
- Buttons:** Cancel and 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.
4. Click the **Return Part** button to complete the return.

You are returned to the Work Order Parts Actions History page where you can see the returned part transaction information when you expand the view.

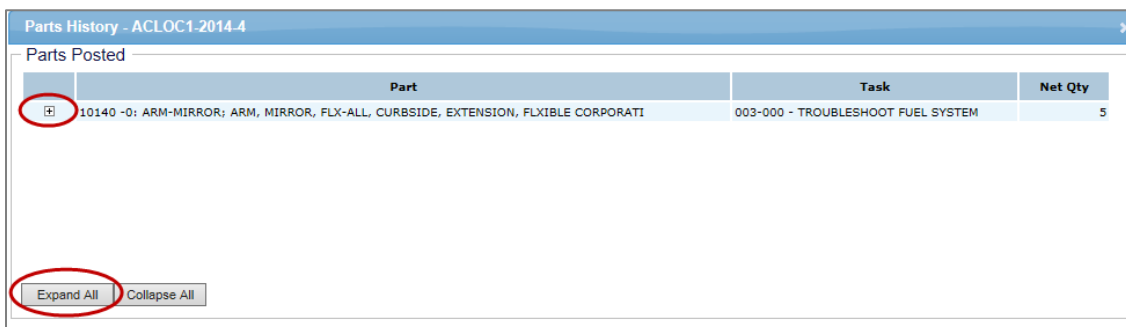
Return Issued Parts (with Approval Required)

This section is provided for supervisors to understand the flow when approval is required for returning parts.

To return issued (posted) parts to inventory where approval is required, technicians must follow the steps below.

To return issued parts:

1. On the Parts History pop-in, click the **+** or the **Expand All** button.



The 'Parts History - ACLOC1-2014.4' table displays the following data:

	Part	Task	Net Qty
☒	10140 -0: ARM-MIRROR; ARM, MIRROR, FLX-ALL, CURBSIDE, EXTENSION, FLXIBLE CORPORATI	003-000 - TROUBLESHOOT FUEL SYSTEM	5

At the bottom of the table, there are two buttons: **Expand All** and **Collapse All**. The **Expand All** button is circled in red in the image.

2. 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 Issue Location:	Date Posted: 08/03/2015 12:38 PM Employee:	WAC: Position:	
Return	Issue Qty 2.00 EACH Issue Location:	Date Posted: 08/03/2015 12:36 PM Employee:	WAC: Position:	
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

Employee

Comments

Qty to return

Reason

Date

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 **Submit Request** 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).

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	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.

Once supervisor approval has been given, the Parts Posted history reflects the approved request as indicated in the screenshot below.

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
Qty Returned	Date	Employee	Status	Reason
1	02/07/2011 11:50 AM	MOLLYT	APPROVED	wrong part

- Click the **X** in the upper-right corner of the pop-in or the **Cancel** button to go back to the Post Work Order Parts pop-in.

22. Commercial Work History Pop-in

Click the Pending Commercial Work icon  on the Work Order Management page to display the Commercial Work History pop-in. The pop-in displays posted and pending commercial work. Pending commercial work includes commercial requests (requests with line item type of 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).

Commercial Work History - -2015-1

Posted Commercial Work

Vendor ID	Task ID	WAC ID	Date	Reversal	Labor Hours	Labor Cost	Parts Cost	Misc Cost	Tot

Pending Commercial Work

Date	Request	Task ID	Vendor ID	Date Required	Status	Action
05/10/2016 10:39		A - PM SERVICE A	191-943 - PEACHTREE HILLS HOLDING,LLC		OPEN	C-201

Showing 1 record

Cancel

The Commercial Work History pop-in includes a **Date Required** column (if one exists for the line item).

- If you need to cancel a commercial request, click **Cancel**.

Pending Commercial Work

Date	Request	Task ID	Vendor ID	Date Required	Status	Action
09/30/2015 10:00 AM	479990	- INSPECTION		09/30/2015	PENDING	Cancel
07/21/2015 11:15 AM	479687	- TASK 020 - SUPPORTS ALL ASSET		07/22/2015	OPEN	

23. Serial Numbers Page

In the Actions area, click the **Serial Numbers** button on the Work Order Main page for Part Rebuilds to display the Serial Numbers page.

Work Order

Quantity Completed 0

Part ID 100-1 - REBUILDABLE PART

Work Order ID -2013-18

Job Type INV REBUILD

Rebuild Quantity 1

Priority 1 - EMERGENCY/IMMEDIATE

Job Status OPEN

Restock Location - REPAIR SHOP 1

Projected Completion Date 12/31/2019 11:02 AM

Serial Numbers 1

#	Completed?	Serial No	Comments
1	N		

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).

Serial Numbers 1

#	Completed?	Serial No	Comments
1	N	12345689	

Save Changes

2. Click **Save Changes** to add the serial number to the part.

Serial Numbers 1

#	Completed?	Serial No	Comments
1	N	12345689	

Save Changes

A message displays to indicate a successful update.

24. Work Order Part Release/Completion Page

Click the **Completion** button on the Work Order Main page for Part Rebuilds to display the Work Order Part Release/Completion page. This page is to be used in rare situations where some parts are needed to be released to inventory as soon as possible.

Work Order			
Quantity Completed	0		
Part ID	100-1 - REBUILDABLE PART		
Work Order ID	2013-18	Job Status	OPEN
Job Type	INV REBUILD	Restock Location	- REPAIR SHOP 1
Rebuild Quantity	1	Projected Completion Date	12/31/2019 11:19 AM
Priority	1 - EMERGENCY/IMMEDIATE		

Completion History	
No items completed	

Part Release / Completion	
Date Released	12/31/2019 11:19 AM
Qty	
Scrapped	☐
Serial No	...
Bin ID	...

Back Save

➡ Complete the fields and click **Save** to release parts to inventory.

Completion History	
No items completed	

Part Release / Completion	
Date Released	12/31/2019 11:19 AM
Qty	
Scrapped	☐
Serial No	...
Bin ID	...

Back Save

The Completion History is listed and a message indicates the successful update.

Completion History						
Completion Date	Quantity	Scrapped	Unit Cost	Total Cost	Bin ID	Serial No
12/31/2019 11:19 AM	1	N	\$ 0.00	\$ 0.00		1233456

Part Release / Completion	
Successful update.	
Date Released	12/31/2019 11:22 AM
Qty	

25. Work Order Test Results Pop-in



A detailed overview of test results is explained in the *Test Results Process Guide*. Refer to that guide for more information about test results and using the Test Results screen and Test Results pop-in.

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																
Life Meter 1	300 MILES	Station Location	CNLOC1 - REPAIR SHOP 1														
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																
Repair Reason ID	J - OTHER	Work Class															
Account ID	CNACCT0001 - UNIT ACCOUNT 0001	Parking Stall															
Priority ID	3 - ROUTINE	Reference Order ID															
Contact Name		Phone															
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												
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 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. Otherwise, to begin a new test, or find detailed test result information, follow the instructions in the *Test Results Process Guide*.

26. Transfer/Defer Repairs Page

To transfer or defer repairs:

1. Open the Work Order Details page (from an open work order in Work Order Main, click **View/Edit Detail**, or click a work order ID link from the Work Orders gadget).
2. Click **Transfer/Defer Work** on the Work Order Details page.

Work Order Details

Asset ID			
Repair Location			
Work Order ID		Job Status	OPEN
Job Type	REPAIR	Unit In	09/17/2015 13:08
Due	09/18/2015 13:08		
Work Order Offset			
Projected Completion Date	09/24/2015 14:20	Service Status	SERVICE STATUS 001
Hours Completed	0.17 / 0.17 (100.00%)	Tasks Completed	0 / 1 (0.00%)
Repair Reason ID		Work Class	1 - SCHEDULED
Account ID		Parking Stall	
Priority ID	3 - ROUTINE	Reference Order ID	
Contact Name		Phone	

Summary Cost Info

Labor Hours	Labor Cost	Parts Cost	Commercial Cost	Equipment Cost	Total Cost
0.17	5.30	0.00	0.00	0.00	5.30

Comments

Save Comments

Work Order Postings

Complaint	POT HOLE - POT HOLE OR CRACK IN ROAD
-----------	--------------------------------------

Back

Assignments

Finish Work Order

Close Work Order

Transfer/Defer Work

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

The Transfer/Defer Repairs page displays.

Transfer/Defer Repairs from Work Order

☒ Defer to new Work Order at this location
☐ Transfer to new Work Order at

Or Transfer/Defer to existing Work Order

	Work Order ID	Status	Service Status	Repair Reason	Priority	Datetime In
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/16/2015 13:17
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/16/2015 11:29
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/09/2015 17:20
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/08/2015 12:50
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/08/2015 12:41
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/02/2015 13:43
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/02/2015 13:13
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/17/2015 13:06
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/09/2015 12:05

Continue

Cancel

To defer to a new work order at this location or to transfer to a new work order at a specific location:

1. Select the appropriate radio button and click **Continue**.

Transfer/Defer Repairs from Work Order 387

☒ Defer to new Work Order at this location
☐ Transfer to new Work Order at

Or Transfer/Defer to existing Work Order

	Work Order ID	Status	Service Status	Repair Reason	Priority	Datetime In
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/16/2015 13:17
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/16/2015 11:29
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/09/2015 17:20
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/08/2015 12:50
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/08/2015 12:41
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/02/2015 13:43
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/02/2015 13:13
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/17/2015 13:06
Select	WORK ORDER ID	OPEN	SERVICE STATUS 001	REPAIR REASON	3 - ROUTINE	09/09/2015 12:05

The Transfer/Defer Repairs from a work order to a New Work Order page displays.

New Work Order CNLOC1-2015-389 Enterprise Portal Equipment Screen

Job Type: REPAIR

Location:

Equipment ID: INTE235

Work Position

From Marker: ... Offset:

To Marker: ... Offset:

Asset Length: 36.0 feet Selected Length: 0.0 feet

Work Details

Repair reason ID: ...

Work Class: 1 SCHEDULED

Service Status: SS-001 SERVICE STATUS 001

Date and Time Assigned: 09/24/2015 14:25

Date and Time Due: 09/25/2015 14:25

Vendor: ...

Technician: ...

Estimated Appointment:

- 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**.

Transfer/Defer Repairs from Work Order CNLOC1-2015-387

Asset ID			
Repair Location			
Work Order ID		Job Status	OPEN
Job Type	REPAIR	Unit In	09/17/2015 13:08
Due	09/18/2015 13:08		
Work Order Offset	E: from 37900 +8.0000 to 37900 +24.0000		
Projected Completion Date	09/24/2015 14:28	Service Status	SS-001 - SERVICE STATUS 001
Hours Completed	0.17 / 0.17 (100.00%)	Tasks Completed	0 / 1 (0.00%)

Transfer/Defer Items to Work Order CNLOC1-2015-389

☒	Symptom: POT HOLE POT HOLE OR CRACK IN ROAD	Description:
☒	SR Task: AC1 - BASIC TASKS	
☒	Task: AC1 - BASIC TASKS	WAC: 17

(This transaction could take several minutes to complete.)

You are returned to the Work Order Main page after a successful transfer/deferral.

To transfer/defer to an existing work order, follow the instructions below.

1. Click **Select** for the existing work order.

Transfer/Defer Repairs from Work Order CNLOC1-2015-387

☐ Defer to new Work Order at this location
☒ Transfer to new Work Order at ▼

Or Transfer/Defer to existing Work Order

	Work Order ID	Status	Service Status	Repair Reason	Priority	Datetime In
Select	CNLOC1-2015-387	OPEN	SS-001 - SERVICE STATUS 001	POTHOLE POT HOLE OR CRACK IN ROAD	3 - ROUTINE	09/16/2015 13:17
Select	CNLOC1-2015-387	OPEN	SS-001 - SERVICE STATUS 001	POTHOLE POT HOLE OR CRACK IN ROAD	3 - ROUTINE	09/16/2015 11:29
Select	CNLOC1-2015-387	OPEN	SS-001 - SERVICE STATUS 001	POTHOLE POT HOLE OR CRACK IN ROAD	3 - ROUTINE	09/09/2015 17:20
Select	CNLOC1-2015-387	OPEN	SS-001 - SERVICE STATUS 001	POTHOLE POT HOLE OR CRACK IN ROAD	3 - ROUTINE	09/08/2015 12:50
Select	CNLOC1-2015-387	OPEN	SS-001 - SERVICE STATUS 001	POTHOLE POT HOLE OR CRACK IN ROAD	3 - ROUTINE	09/08/2015 12:41
Select	CNLOC1-2015-387	OPEN	SS-001 - SERVICE STATUS 001	POTHOLE POT HOLE OR CRACK IN ROAD	3 - ROUTINE	09/02/2015 13:43
Select	CNLOC1-2015-387	OPEN	SS-001 - SERVICE STATUS 001	POTHOLE POT HOLE OR CRACK IN ROAD	3 - ROUTINE	09/02/2015 13:13
Select	CNLOC1-2015-387	OPEN	SS-001 - SERVICE STATUS 001	POTHOLE POT HOLE OR CRACK IN ROAD	3 - ROUTINE	09/17/2015 13:06
Select	CNLOC1-2015-387	OPEN	SS-001 - SERVICE STATUS 001	POTHOLE POT HOLE OR CRACK IN ROAD	3 - ROUTINE	09/09/2015 12:05

Continue

Cancel

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 CNLOC1-2015-387

Asset ID: CNLOC1-2015-387

Repair Location: POT HOLE POT HOLE OR CRACK IN ROAD

Work Order ID: CNLOC1-2015-387

Job Status: OPEN

Job Type: REPAIR

Unit In: 09/17/2015 13:08

Due: 09/18/2015 13:08

Work Order Offset: E: from 37900 +8.0000 to 37900 +24.0000

Projected Completion Date: 09/24/2015 14:28

Service Status: SS-001 - SERVICE STATUS 001

Hours Completed: 0.17 / 0.17 (100.00%)

Tasks Completed: 0 / 1 (0.00%)

Transfer/Defer Items to Work Order CNLOC1-2015-389

Item	Description:
☒ Symptom: POT HOLE POT HOLE OR CRACK IN ROAD SR Task: AC1 - BASIC TASKS	
☒ Task: AC1 - BASIC TASKS	WAC: 17

Back Save (This transaction could take several minutes to complete.)

After a successful transfer/deferral, you are returned to the Work Order Main page.

27. Crew Workflow

Crew Foreman (from Technician Portal)

A Crew Summary tab is viewable from the Technician Portal. This tab will only display for the designated crew foreman as set in the system.



Note: A Supervisor is required to identify the Crew Foreman on the Crews screen.

The screenshot shows the 'Crews' management interface. On the left is a sidebar with 'Basic Info' and 'Skills' tabs. The main area is titled 'Basic Info' and contains several input fields: 'Description', 'Location ID', 'Shift ID', 'Crew foreman' (highlighted with a red circle), and 'Calendar ID'. To the right of these fields are two checkboxes: 'Can be scheduled' and 'Date and time available for'. At the top of the main area, there are buttons for 'Search', 'Reload', 'Sort', 'New', 'Copy', and 'Delete', along with 'Select Filter' and 'Select Sort' dropdown menus.

This screen allows the crew foreman to manage the employees on his crew conveniently from his own work portal.

The screenshot displays the 'Crews' section of the Technician Portal. At the top, there are tabs for 'Current Job', 'My Work', 'Work Calendar', 'Crews', 'Equipment', and 'Requests'. Below the tabs, there are fields for 'Crew' (a dropdown menu), 'Employee' (a text input), and a 'Primary Crew' checkbox. There are also buttons for 'Add to Crew' and 'Remove from Crew'. Below these fields is a 'Crew Time Entry' section with an 'Action' dropdown (set to 'Clock In'), an 'Update Selected Employees' button, and an 'Override Task/Clock Out Time' field. The main part of the screen is a table with the following columns: 'Postings', 'Employee ID', 'Employee Name', 'Clocked In Date/Time', 'Time Code', 'Current Task', 'Jobbed On Date/Time', 'Elapsed Time On', 'Action', 'Timesheet', and 'Primary Crew'. Two rows of data are shown, each with a 'Clock Out' button and a 'View Timesheet' button. The 'Primary Crew' column has a green checkmark for both rows.

Start Task

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

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	

Supervisor

Click the **Crew Time Entry** button or the **Work Order Details** page. The **Pending Labor Postings** page will be displayed. This page allows you to add a crew posting including add an employee to a crew, add a work order to a crew, or provide task detail.

To post work order crew labor:

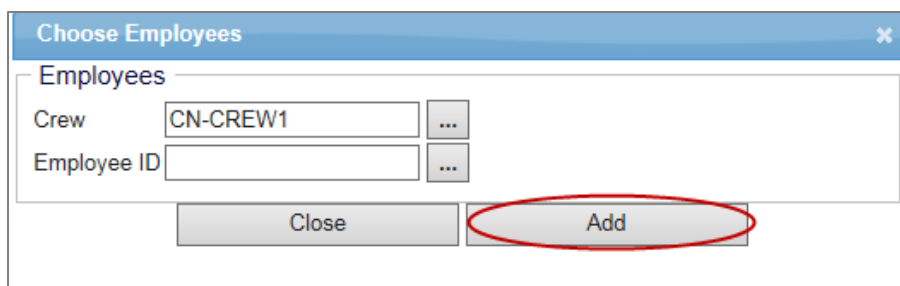
1. To add a Crew labor posting, click **Add Crew Posting**.

Edit	Delete	Line No	Employee	Crew	Work Order	Asset ID	Task ID	WAC	Date	Start Date	End Date
------	--------	---------	----------	------	------------	----------	---------	-----	------	------------	----------

The Crew Posting dialog displays.

2. To add employees or crew, click **Add Employees**.

3. In the in the Choose Employees dialog, click the  button to select a Crew or Employee ID and click **Add**.



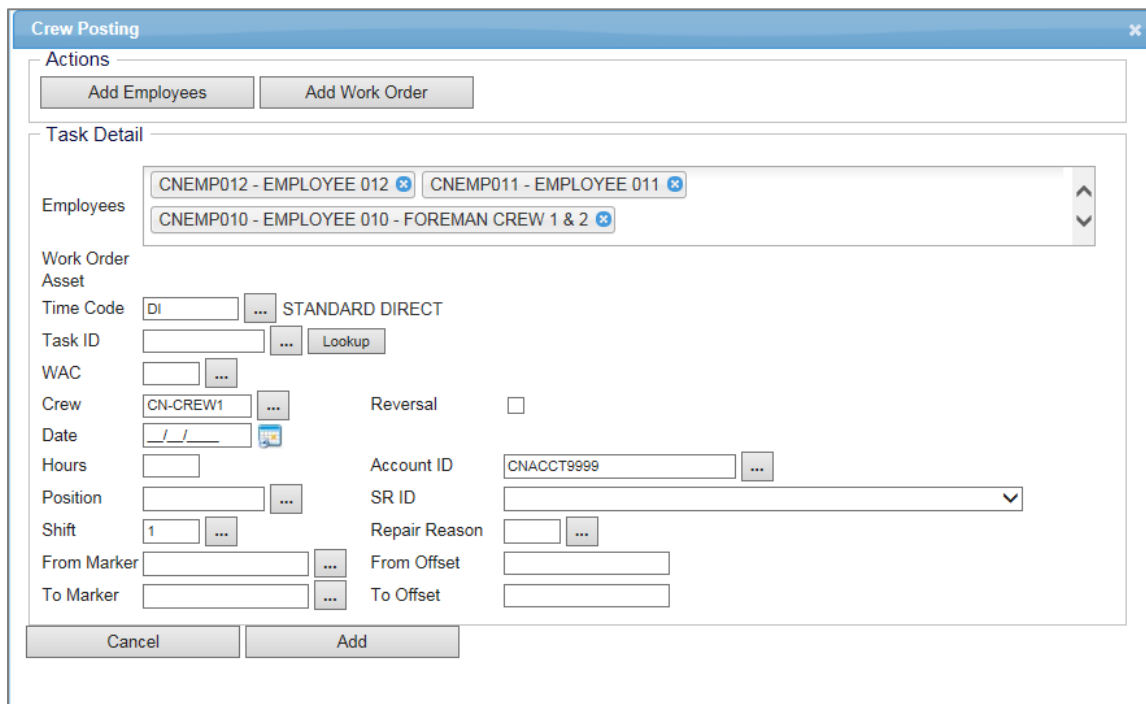
Choose Employees

Employees

Crew ...

Employee ID ...

The crew/employees default to the Crew Posting dialog.



Crew Posting

Actions

Task Detail

Employees

Work Order

Asset

Time Code ... STANDARD DIRECT

Task ID ...

WAC ...

Crew ...

Reversal ☐

Date ...

Account ID ...

Position ...

SR ID

Shift ...

Repair Reason ...

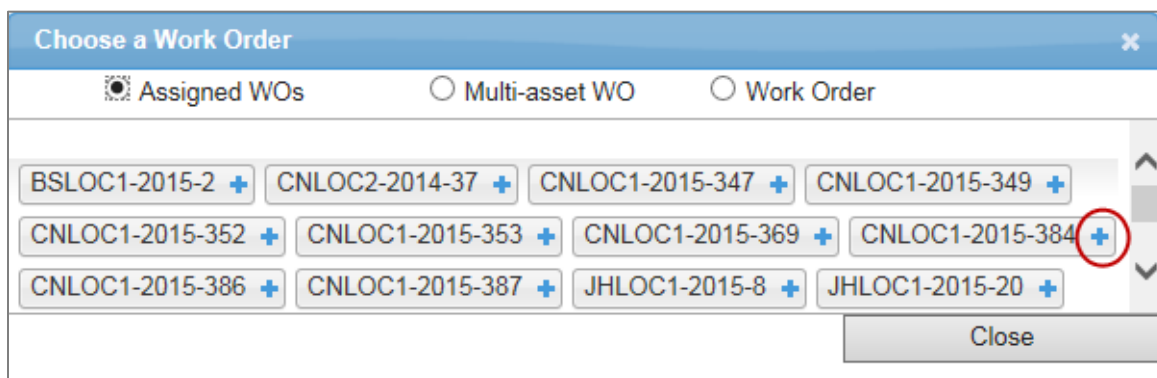
From Marker ...

From Offset

To Marker ...

To Offset

4. Select the Assigned WOs, Multi-asset WO, or Work Order radio button and click the + to choose the specific work order.



Choose a Work Order

☒ Assigned WOs ☐ Multi-asset WO ☐ Work Order

+ + + +

+ + + +

+ + + +

Information from the selected work order defaults to the Crew Posting dialog.

Crew Posting

Actions

Add Employees Add Work Order

Task Detail

Employees: CNEMP012 - EMPLOYEE 012 CNEMP011 - EMPLOYEE 011
CNEMP010 - EMPLOYEE 010 - FOREMAN CREW 1 & 2

Work Order: CNLOC1-2015-384
Asset: INTE235 - 2006 ==Meters:1-0 NONE;2-0 NONE==INTERLOCKING E235 AVONDALE THROAT-PM
Time Code: DI STANDARD DIRECT
Task ID: Lookup
WAC: ...
Crew: CN-CREW1 Reversal: ☐
Date: / /
Hours: Account ID: 1000.531395.18980.000.00000
Position: SR ID:
Shift: 1 Repair Reason:
From Marker: 37900 From Offset: 8.0000
To Marker: 37900 To Offset: 21.0000

Cancel Add

5. Complete the remaining fields and click **Add** to review the Pending Labor Postings.

Crew Posting

Actions

Add Employees Add Work Order

Task Detail

Employees: CNEMP012 - EMPLOYEE 012 CNEMP011 - EMPLOYEE 011
CNEMP010 - EMPLOYEE 010 - FOREMAN CREW 1 & 2

Work Order: CNLOC1-2015-384
Asset: INTE235 - 2006 ==Meters:1-0 NONE;2-0 NONE==INTERLOCKING E235 AVONDALE THROAT-PM
Time Code: DI STANDARD DIRECT
Task ID: AC1 BASIC TASKS
WAC: 05 CLEANED
Crew: CN-CREW1 Reversal: ☐
Date: 09/23/2015
Hours: 5 Account ID: 1000.531395.18980.000.00000
Position: SR ID: AC-SYM-DIRTY - DIRTY
Shift: 1 Repair Reason: CN01 REPAIR REASON MAX CHARACTER 01
From Marker: 37900 From Offset: 8.0000
To Marker: 37900 To Offset: 21.0000

Cancel Add

6. Click the **Delete**  button to delete a row if you added one by mistake or click the **Edit**  button to modify an entry.

Post Work Order Crew Labor

Pending Labor Postings

Add Crew Posting

Edit	Delete	Line No	Employee	Crew	Work Order	Asset ID	Task ID	WAC	Date	Start Date	End Date	Hours	Tr Co
		2	CNEMP012	CN-CREW1	CNLOC1-2015-384	INTE235	AC1	05	09/23/2015			5	DI
		3	CNEMP011	CN-CREW1	CNLOC1-2015-384	INTE235	AC1	05	09/23/2015			5	DI

7. Click **Post Labor** to post labor to the work order.

A successful insert message displays.

Post Work Order Crew Labor

☒ Successful insert

Pending Labor Postings

Add Crew Posting

Edit	Delete	Line No	Employee	Crew	Work Order	Asset ID	Task ID	WAC	Date	Start Date	End Date	Hours
------	--------	---------	----------	------	------------	----------	---------	-----	------	------------	----------	-------

Cancel Post Labor

The posting displays on the Work Order Details page.

Work Order Postings

Complaint: AC-SYM-DIRTY - DIRTY

Cause: AC-DIRTY - COVERED IN FILTH

WAC: 05 - CLEANED

Correction: CLEANED

Task: AC1 - BASIC TASKS

AC1 - BASIC TASKS Remaining Hours: -6.17 WAC: 05

Labor:

	Start	End	Technician	WAC	Hours	Cost
	09/23/2015		CNEMP012 - EMPLOYEE 012	05 - CLEANED	5.00	171.60
	09/16/2015 11:55	09/16/2015 13:05	MOLLY-EMP - MOLLY	05 - CLEANED	1.17	36.50
Total:					6.17	208.10

Appendix A. Extra Information about Production Run Work Orders

A.1 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.

A production run dictates the need for a particular item. Production run work orders may be created for components and inventory rebuilds. Various stages are involved in production runs and each stage may occur at a different location. Production run work order statuses include open, work finished, and closed.

For additional information about production runs or the Production Manager portal, refer to the *Shop Activity Production Manager User Guide*.



Note: If the location for the work order is a posting location, the production run will use the postings environment as outlined in the [Work Order Details Page](#) sections above.

A.2 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 and current stage are listed.

Work Order Main			
Production Run ID	8513	Quantity Completed	0
Part ID	AW-PT-001-1 - ~~AW-PT-001-1~~ PART	Tech ID	Tech Name
Work Order ID	~~AW-PT-001-1~~	Job Status	OPEN
Job Type	INV REBUILD	Restock Location	~~AW-PT-001-1~~
Rebuild Quantity	10	Current Stage	AW-PT-001 REBUILD 1
Projected Completion Date	INSUFFICIENT DATA	Priority	3 - ROUTINE
Tasks: 4		All WO Tasks	
Task ID		Actions	
000-901 - NEW VEHICLE IN SERVICE INSPECTION		Main Page	
001-103 - ELECTRICAL - HORN / HORN CIRCUIT		Start Delay	
		View/Edit Detail	
		Next Stage	
		Part Actions	
		Notes	
		Serial Numbers	
		Print Work Order	
		Completion	
		Commercial Work	
		Postings	
		Relationships	

A.3 Work Order Management Page

When viewing a production run work order, the Work Order Management page has the Production Stage filter options: **My Stage** and **Coming Soon**. **Coming Soon** allows you to see the production run work orders that are arriving at your location in the near future. For more information about how to use the Work Order Management page, please refer to the [Work Order Management Page](#) section of the main document.

The screenshot shows the Work Order Management page. At the top, there's a 'Current Working Location' section with a dropdown menu and a 'Go to Work Order' button. Below this is a 'Current Location' dropdown and a 'View Calendar' button. To the right, there's a 'Year' dropdown set to 2019, a 'No.' input field, and a 'Go' button. The main section is titled 'Work Orders: 2' with 'Expand All' and 'Collapse All' buttons. It contains a table with columns: Tasks, Notifications, Jobbed on, WO Number, View / Edit Assignments, Assigned, Rebuild Part ID, Production Run ID, Stage, Restock Location, Qty Completed, and Qty Required. Two rows are visible, both with 'PT-001-1' as the Rebuild Part ID and '8513' as the Production Run ID. Below the table is a 'Current Filter:' dropdown and a 'No filter defined.' message. To the right of the filter section are dropdowns for 'Record Type' (set to PRODUCTION RUN WO) and 'Asset Type' (set to INVENTORY REBUILD). Below these are radio buttons for 'Assignment Status' (ALL, ASSIGNED, UNASSIGNED), 'Production Stage' (MY STAGE, COMING SOON), and 'Approval Status' (ALL, APPROVED, UNAPPROVED). The 'Production Stage' section is circled in red. At the bottom, there are buttons for 'Back', 'New Work Order', 'Work Order Center', 'Service Request Screen', and 'Review and Close WOs'.

A.4 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 the Task Selector Box. It has a 'Tasks: 4' label and a dropdown menu with a red circle around the arrow. The dropdown menu is open, showing a list of tasks: 'All WO Tasks', 'PT-001 REBUILD 1 - STAGE 1', 'PT-001 REBUILD 2 - STAGE 2', 'All WO Tasks', 'CIRCUIT', and '001-301 - ELECTRICAL - INTERIOR'. To the right of the dropdown is an 'Actions' button. Below the dropdown, there's a table with columns: M, Ne, Serie, and Comm.

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** button. The **Next Stage** button displays when more stages exist on the production run. The **Finish** button displays in its place when it is the last stage of the production run.

Work Order Main																	
Production Run ID	8513	Quantity Completed	0														
Part ID	PT-001-1 - PART	Tech ID	No employees														
Work Order ID		Job Status	OPEN														
Job Type	INV REBUILD	Restock Location															
Rebuild Quantity	10	Current Stage	-PT-001 REBUILD 1														
Projected Completion Date	INSUFFICIENT DATA	Priority	3 - ROUTINE														
Tasks: 4		All WO Tasks															
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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.

Work Order Main																						
Production Run ID	8513	Quantity Completed	0																			
Part ID	PT-001-1 - PART	Tech ID	Tech Name																			
Work Order ID		Job Status	OPEN																			
Job Type	INV REBUILD	Restock Location																				
Rebuild Quantity	10	Current Stage	-PT-001 REBUILD 1																			
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- 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. See the [Work Order Part Release Completion Page](#) section above for more information about this page.

Refer to the [Work Order Main Page](#) section in the main document above for more details regarding the Work Order Main page.