





Web Work Overview and Setup

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1.1 Overview

The Web Work program is a true Web based application and uses Java script and active server pages. All of the data processing and storage is maintained on the server - there is no program or files to be installed on client workstations. This Chapter contains an overview of Web Work.

1.1.1

1.1.2 System Requirements

Web Work server installation requirements are addressed separately in the Installation document.

Client access to Web Work program requires a computer running Microsoft Internet Explorer Web Browser. As all of the data functionality is executed on the server, hardware requirements for the client computer are minimal – Microsoft recommendations should be adhered to, and client computers should be free of virus and spyware programs for optimal performance. Very slow network connections may affect the speed of the Web Work application, in particular, when running reports and large queries.

Browser security settings should be configured to allow 'COOKIES' and 'JAVA SCRIPT' execution. It is recommended that your Web Work server be added to the client 'Trusted Sites' to maintain your security settings for general internet access. Basic operation of Web Work requires NO programs, java applets, dll's or other codes to be installed on the client computer, although some enhanced functionality, such as Palm synchronization, may require additional client software.



IMPORTANT NOTE: the current version of Web Work is NOT completely certified for operation on Netscape, Mozilla, or other browsers, and requires Microsoft Internet Explorer for proper operation. Some formatting of the pages may not appear correctly using some of the 'alternative' browsers. Web Work applications have also been ported to Windows CE handheld devices.

1.1.3 Wireless and Remote Access

As Web Work is a true web based application, it requires only a client running Microsoft Internet Explorer and a TCP/IP connection to the server. The network transport can be satellite, 802.11x wireless, modem, cellular or any other existing or emerging technology. A Windows based notebook or tablet computer with Internet Explorer can, in theory, access a Web Work system from anywhere on earth (and maybe even space!!).

1.2 System Setup

1.2.1 Server Setup

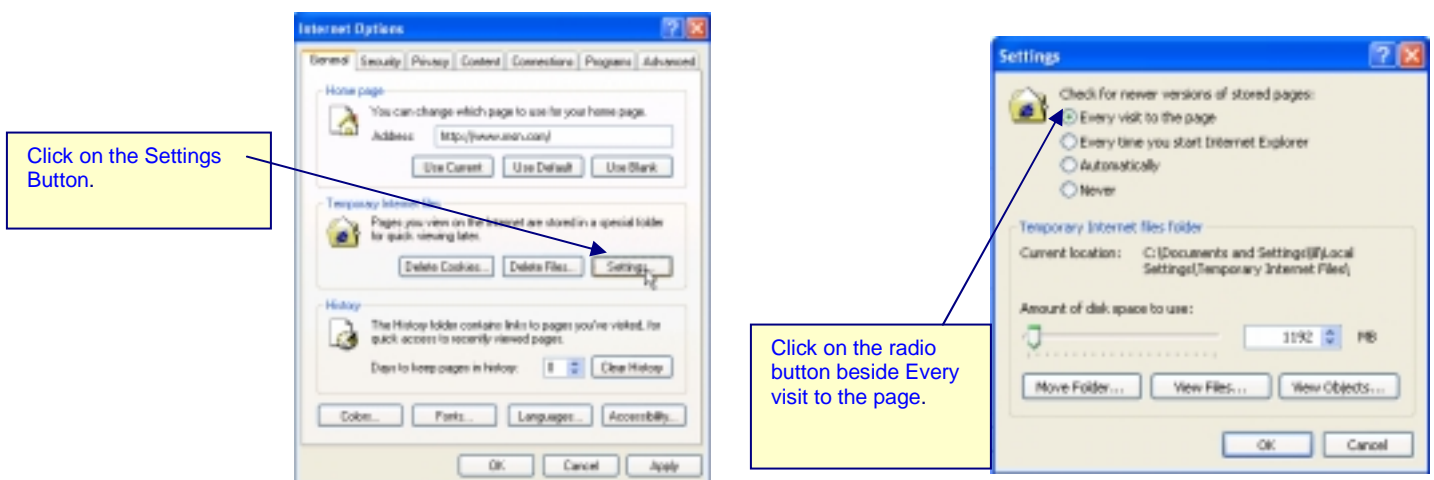
PLEASE SEE THE INSTALLATION DOCUMENT FOR WEB WORK SERVER INSTALLATION INSTRUCTIONS.

1.2.2 Web Browser (Client) Setup

It is important to ensure your Web browser is set up properly to ensure optimum performance of the Web Work system. To access these screens click on the Tools menu item in Internet Explorer and select Internet Options from the drop down menu. Check to make sure your web browser settings are set as follows.

Please note that the location of these options has changed with different versions of internet explorer – if you are unsure or cannot find the options, please consult your network administrator or Tero technical support personnel.

- Set the Internet Settings to check for newer versions of stored pages on every visit to the page.



Be sure to periodically clean out your Temporary Internet Files. This will increase speed and reduce problems.

1.3 Accessing the System

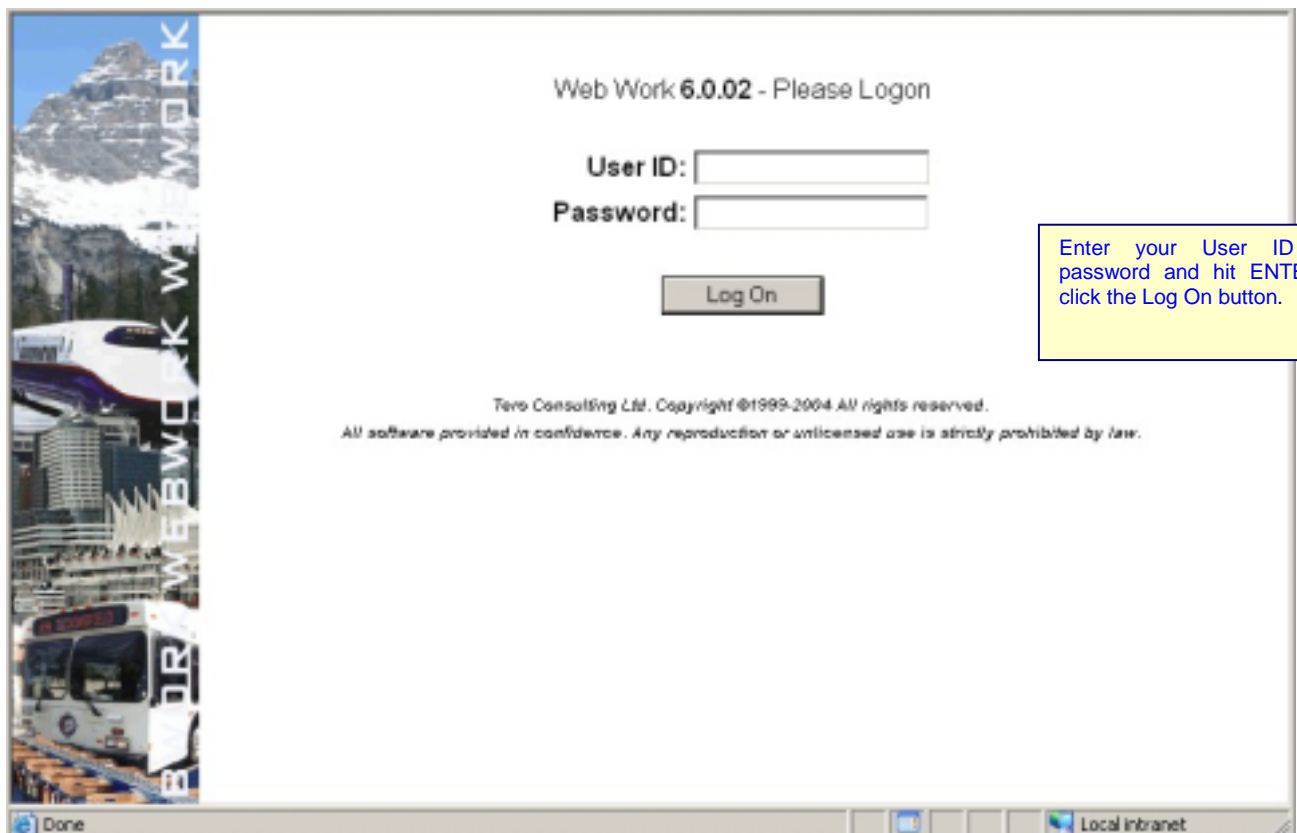
To login to and start using the Web Work system, you will require a connection to your Web Work server, a Userid and Password. Open your Internet browser (MS Internet Explorer) and type in the Address (URL) where Web Work is located – this URL will be provided to you by your system administrator who has configured/installed the Web Work system, and will resemble: <http://www.yourcompany.com/webwork>. The Web Work logon screen, as shown below, should appear. If you are unable to connect, consult your network administrator.

1.3.1 Logging In to Web Work

Type in your user name and password, and then press the **ENTER** key on your keyboard or click the Log On button to open the system. If you do NOT have a username or password, please contact your Web Work system administrator.



To return to this page every time you enter your browser, set this URL as your Home Page or add it to your “Favorites” (MS Internet Explorer).



The screenshot shows the Web Work 6.0.02 login interface. On the left is a vertical banner with a mountain, a train, and a bus, with the text 'WEBWORK' repeated vertically. The main content area has the title 'Web Work 6.0.02 - Please Logon'. Below the title are two input fields: 'User ID:' and 'Password:'. A 'Log On' button is positioned below the password field. At the bottom of the page, there is a copyright notice: 'Tero Consulting Ltd. Copyright ©1999-2004 All rights reserved. All software provided in confidence. Any reproduction or unlicensed use is strictly prohibited by law.' The browser's status bar at the bottom shows 'Done' and 'Local intranet'.

Enter your User ID and password and hit ENTER or click the Log On button.

1.4 Web Work Modules and Screen Navigation

As you login to Web Work, a NEW browser window will be opened. The login window (from previous page), will remain open in the background, and the new window will take you to your default 'module' in Web Work. Default modules are set by the system administrator based on the GROUP that you are in.

The left side of the screen has the available module buttons – click on the module to change to it. The center part of the screen has the content/editing area for the module that you are in.

The screen you see will look like the one shown below.

Screen Layout

The screenshot shows the 'Work Order Module' interface in a Microsoft Internet Explorer browser window. The interface includes a top navigation bar with 'Operations Resources Tools Help' and a 'Work Order Module' title. A left sidebar contains a tree menu with options like Maintenance, Assets, Inventory, Purchasing, Admin, Proj Mgmt, My Calendar, Help, and Logoff. The main content area contains various data entry fields and buttons. Callout boxes provide the following descriptions:

- Module Option Menu:** Module functions are available grouped in the drop down menu. (Points to the 'Operations Resources Tools Help' menu)
- Module Name:** (Points to the 'Work Order Module' title)
- Field Label:** Identifies the name / use of the adjacent data field. (Points to the 'Procedure' label)
- Text/Data Fields:** Data is typed into these fields. (Points to the 'Contact' field)
- Field Lookup Button:** Click to select values in fields that are attached to other modules or lists. (Points to the magnifying glass icon next to the 'Comp Remark' field)
- Mode Indicator:** The Mode you are in is displayed at the bottom of the screen. (Points to the 'query' text at the bottom left)
- Action Icons:** The action icons will change in different "modes". (Points to the icons at the bottom right)
- Side Bar Menu:** Tree menu selection of Various modules. (Points to the left sidebar menu)

1.4.1 Module Name

The module you are currently working in will always be indicated in the upper right of the module screen.

1.4.2 Module Options Menu

Every module in Web Work has a uniform Module Options Menu, across the top of the module screen, consisting of options: [Operations](#) [Resources](#) [Tools](#) [Help](#). The functionality of the menus varies slightly between modules with different options available. Consult the user manual for each module for details of the menu operations and functions.

1.4.3 Text/Data Fields

The text field on the module screen is where the data is entered. The fields can be configured to display in different shades based on their functionality and requirements. By default, Web Work fields are:

- WHITE – optional fields, you may enter data in the field if you wish
- Grey/Blue – mandatory fields – you cannot save the record unless these fields are completed
- Light Grey – system fields – these fields will be automatically filled in by the system and are not editable by the user.

Your system may be configured with different color schemes or with additional required fields.

1.4.4 Field Labels

Each text/data field also has a field label, indicating what data is contained in the adjacent field. Field labels can be customized to your specific Web Work installation. Clicking on the field label will bring up HELP for that field. (Help is discussed further on in this manual).

1.4.5 Field Lookup Icon and Calendar Icon

Many of the fields on each application screen are 'driven' or attached to codes and data from other modules. In these cases, the information entered in the field must exist in the module that it is attached to.

For example, a location code entered on a work order must exist in the location module. When entering data in these fields, you may either type the data in directly or click on the field lookup icon beside the field to look up the code from the module it is attached to.

Likewise, the Calendar Icon will popup a small calendar to allow you to choose the date.

1.4.6 **Mode Indicator**

The current mode is displayed on the bottom left hand side of any Web Work screen. (i.e.: query, edit, new) The default mode when you enter a module is “query” mode. The mode will change as you progress through the module – for example, you enter a module in QUERY mode. You then click the NEW RECORD icon, and you will be in NEW mode. Once you SAVE the record, you will be in EDIT mode.

1.4.7 **New Mode**

In New Mode a new record is created. To enter New Mode, click on the  Add New Record Icon, or select New (record type) from the Operations dropdown in the module option menu at the top of the page.

1.4.8 **Edit Mode**

In Edit Mode records can be altered, additional information can be added, and the record can be resaved. To access Edit Mode you must open an existing record or create and save a new record and have it open on the screen.

1.4.9 **Query Mode**

In Query mode you can retrieve records based on the criteria you select. (See Query By Example section for more information)

1.4.10 **Modules and Module Groups**

The Web Work modules are arranged in logical GROUPS in the side bar menu, to the left of the Web Work screens.

Maintenance Group

The maintenance group contains the common modules that would be accessed for “day to day” maintenance activities:

Work Requests Module

- Create new work requests.
- Query work requests.
- Check the status of work requests.

Work Order Module

- Create/Edit work orders.
- Approve work orders.
- Query/Lookup work orders.
- Allocate time and materials to work orders.
- Complete/Close work order.
- Print work orders.

Timecard Module

- Enter Employee Time cards
- Query / Check time entries

PM Module

- Create/Edit PM templates.
- Query/Lookup PMs.
- Schedule and Generate PMs.
- Add specifications to a PM.

Procedure Module

- Create maintenance procedures.
- Edit maintenance procedures.
- Query maintenance procedures.
- Assign tasks to procedures.

IT Help Desk

- This is an optional module for the Information Technology Department function.

Asset Group

The asset group contains the common modules that would be used for maintaining the organizations Assets – Equipment, Locations and Labour/Employee information.

Equipment Module

- Create/Edit equipment information
- Query/Lookup equipment, details, and equipment history
- Print equipment information and details

Location Module

- Create/Edit location information
- Query/Lookup locations and details
- Print location information

Labour Module

- Create employee
- Edit employee information
- Query employees

Inventory Group

The inventory group contains the modules related to Inventory control in Web Work - the Inventory, Storeroom, and Vendor modules.

Inventory Module

- Create/Edit inventory item information
- Maintain Stock counts and transfers
- Issue inventory items
- Print inventory records and barcodes
- Query inventory records.

Storeroom Module

- Create/Edit storeroom information
- Add Items to storeroom
- Issue items/multiple items from storeroom

Vendor Module

- Create/Edit vendor information
- View vendor items
- Print vendor information

Purchasing Group

The purchasing group contains the modules related to purchasing in Web Work - the purchasing , receiving and item request modules.

Purchasing Module

- Create/Issue new Purchase Orders.
- Query/Lookup existing purchase orders.
- Auto-Generate Purchase Orders (Inventory Automatic Reordering).
- Complete/Close Purchase Orders.

Receiving Module

- Receive items to storerooms

Item Request Module

- Create/Edit Item Requests.
- Create/Edit Kits.
- Issue Requests.

Admin Group

The admin group contains the modules related to the administration of Web Work, including the Admin module, Reports, Budgeting, Interface and Interface Cross Reference modules.

Admin Module

- Create/Edit user groups.
- Create/Modify group and user permissions
- Change user's password.
- Maintain system global defaults.
- Maintain divisions, and division defaults
- Maintain exchange rates
- Maintain status codes
- Maintain GL Codes.
- Set up System Security.

Reports Module

- View Standard Reports.
- Create, Edit and Run Custom Reports.

Budgets Module

- Create/Edit budgets
- Maintain budget types

Interface Module

- Create/Edit interfaces
- Upload/Download information to/from interface files
- Review and post import data from interfaces

Cross Reference (X-Reference) Module

- Maintain data cross reference for interfaces

Project Management Group

The Project Management group contains the modules related to the project management component of Web Work , including the Projects module and the Scheduling module.

Projects Module

- Create/Edit projects
- Assign workorders to projects
- Track completion % and details on projects.

Scheduling Module

- Maintain employee schedules
- Allocate workorder to employees based on schedules

My Calendar/My Schedule

The My Schedule module is a simple popup calendar that shows work assigned to the logged in user.

Help

The help module provides general Web Work help, from system overview down to field specific help in a module.

1.5 System Navigation

1.5.1 Navigating between Modules

You can change between Web Work modules at any time by clicking on the module name in the side bar menu on the left side of the application screen. You can only have one Web Work module open at a time – and opening a different module will close the current module you are working in, and replace it with the 'new' module.

1.5.2 Saving Changes

Being a web based, multi-user database application, the Web Work application has built in functions to control record locking and updating. When you retrieve a record, a 'snapshot' of the data at the time you retrieve it is shown on the screen. You can edit the record as you desire, but no changes will be saved to the database until you click on the SAVE button. If you attempt to exit the module or screen WITHOUT saving your changes, the system will prompt you to save before exiting.

1.5.3 Internet Tool Bar

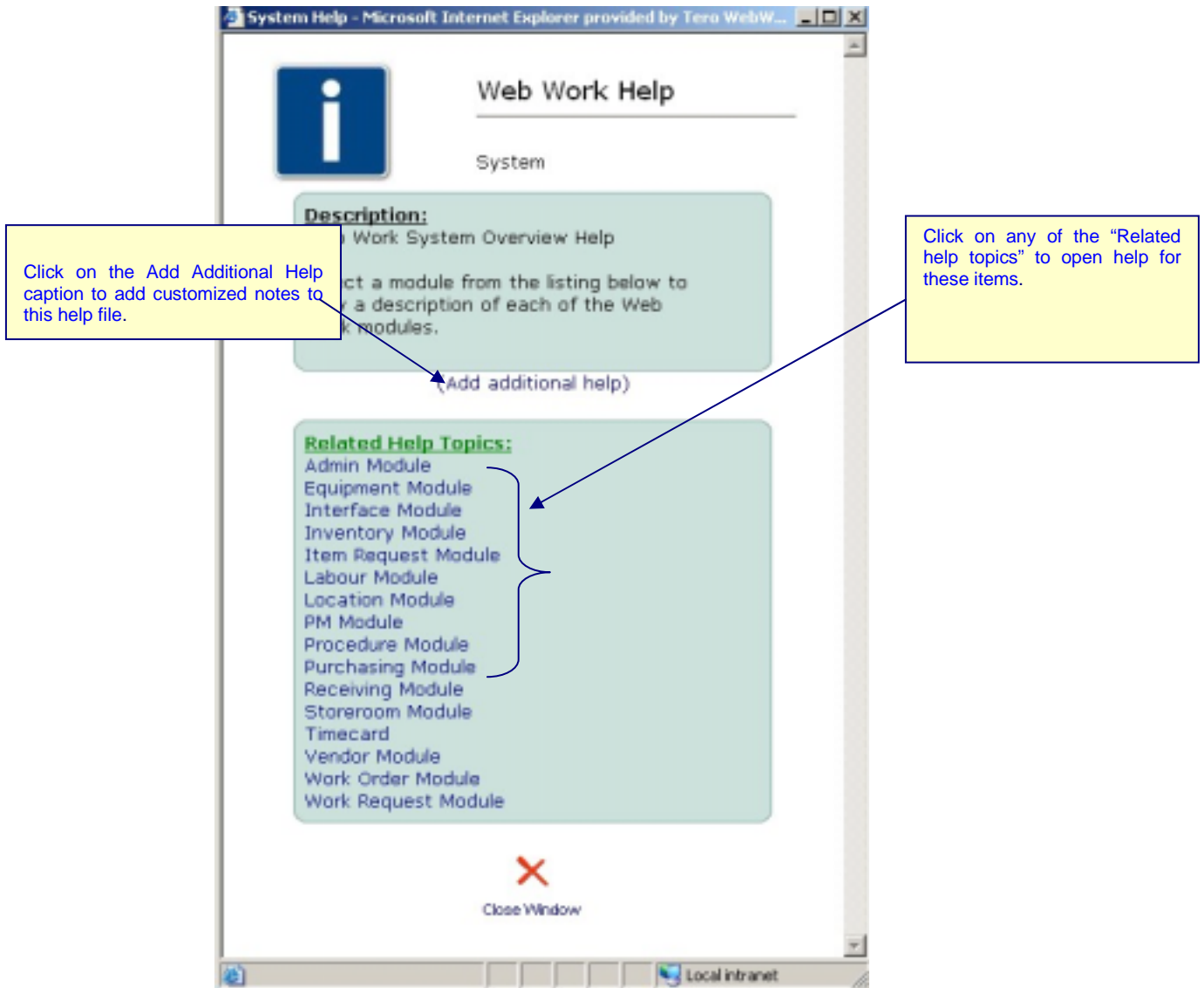
The Internet tool bar has been removed in the Web Work modules screens to eliminate any cross platform problems between web browsing and running a program in the web browser. Some Tool Bar features like the Back button can cause web programs to behave strangely. To avoid these types of problems Web Work has its own navigation buttons like back and forward built in to the program.

1.6 Web Work Help Options

Web Work is user friendly and includes a number of help options, including customized help fields.

1.6.1 System Overview Help

Click on the **HELP** option in the Side Bar Menu button on the left hand side of the screen to display System help.

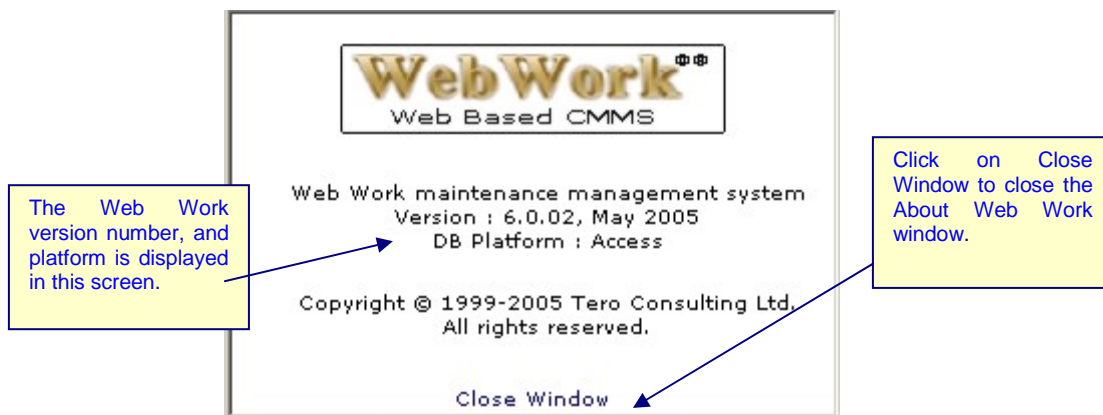


1.6.2 Module Help

Click on the HELP option in the Module Option menu on the top right hand side of the page to display a drop down menu listing the following menu items:



- Current Module Help (ie Work Order Help): displays an overview of the current module and a list of help topics related to that module.
- User Settings: Lets you set defaults for the current user, including default query behaviors and changing passwords. Described in detail below under User Settings.
- Tero Consulting Home Page: connects you to Tero's Home Page on the World Wide Web. (www.tero.ca)
- Technical Support: connects you to Tero's Support Site. From these pages you can check for Web Work program updates, contact a support representative, read Web Work Frequently Asked Questions, review online training guides, and more!
- License Agreement: click on this menu item to display a copy of your Web Work license agreement.
- About Web Work: displays the Web Work copy write and current version details.



When you select any of the items from the HELP button they will open in a **New Window**.

1.6.3 Field Help

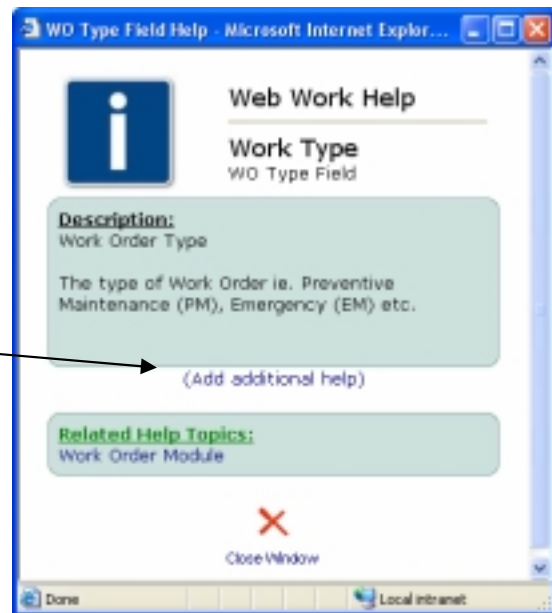
Each field has a help file, which provides details about that field. To access a help file for any field name, just click on the applicable field label. A new window will open displaying the help for the field you selected.

1.6.4 Customizing Help Files

Web Work help files can be personalized to include notes and procedures specific to your organization.

To add notes to help files:

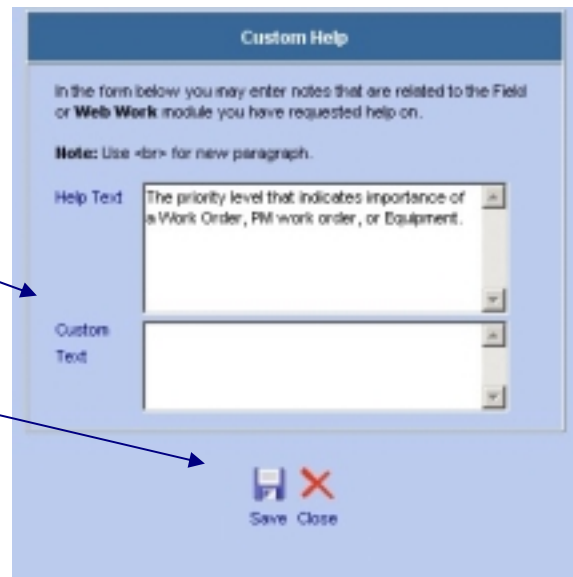
- Click on the field name that you wish to add notes to. (i.e.: Work Type). This will open the help file for this field. (i.e.: Work Type Field Help)
- To add your own notes click on the Add Additional Help caption which will open a Custom Help notes screen.




- In the field called Custom Text, enter your notes. (ie: only the maintenance supervisor can assign a type to a work order).

Write your personalized help notes into the Help Text field.

Click on the SAVE button to save the notes or the CANCEL button to cancel this action.



- Click on the  save icon which will take you back to the field help screen. The information you added will now be shown on the help screen in addition to the default help text.



You may wish to add corporate policies or procedures under your help notes. For instance, if only maintenance supervisors are allowed to approve work orders, enter this note under work order help and other users of the system will know who to contact when a work order has been created but is pending approval.

The help files are written in html code.

The most common html codes you may want to use are:

 - to insert a new paragraph
 - to make the text bold or to stop using bold text
 <u> - to underline the text or </u> to stop using underlined text
 <i> - to make the text italics or </i> to stop using italics text

1.6.5 Contacting Tero Consulting Ltd.

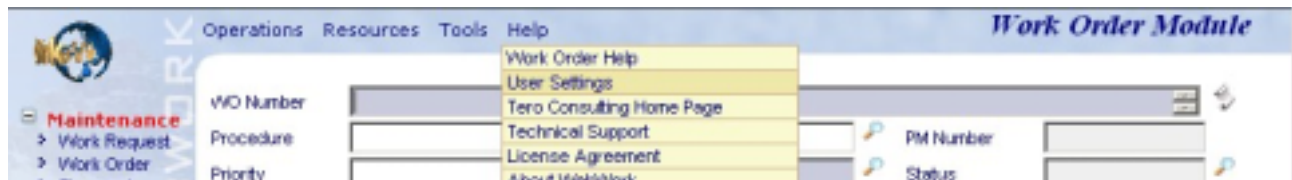
To obtain Customer Support:

Call Tero Consulting Ltd. at (604) 468-1401.

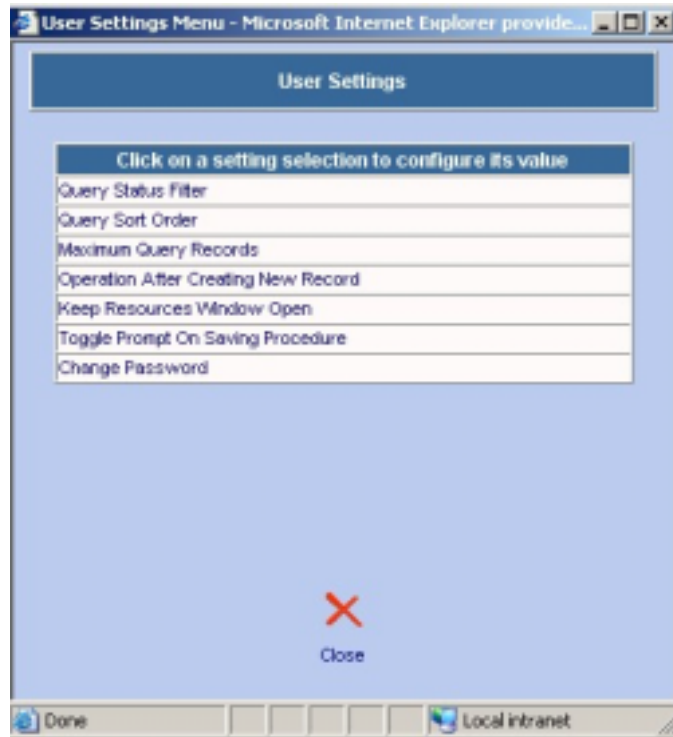
- Email your questions to support@teroconsulting.com.
- Click on the **HELP** menu and choose Technical Support from the drop down menu to view answers to Frequently Asked Questions or to obtain Live Help.

1.7 User Settings

The Web Work program has many variables which can be controlled/defaulted on a per user basis. From any Web Work module, select Help from the Module Option menu, and then click on the User Settings option in the drop down.



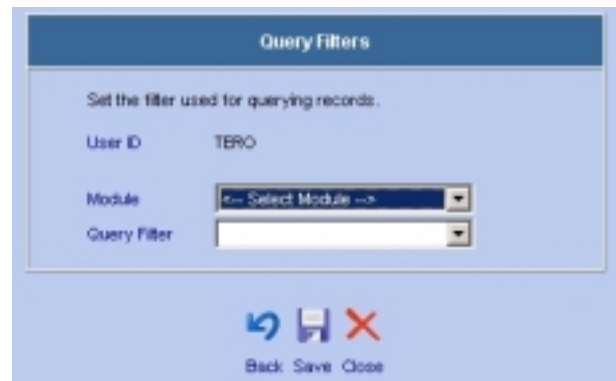
- The user settings screen will popup with the available user setting options:
 - Click on each of the options in the list for user settings.
 - The options are described in detail below.



1.7.1 Query Status Filter

The QUERY STATUS FILTER allows you to set the default FILTER on queries by module. The filter allows you to filter your results WITHOUT having to specify certain criteria each time you do a query.

Select the module from the MODULE drop down, and the query filter will present the options that are available for that module.



For example:

- Select WORKORER MODULE from the module drop down and you will have Query Filter options such as:
- Open WO's only, Approved WO's only, Completed WO's only, etc.
- Selecting any of these will filter ALL of your work order records to only results which match this criteria – COMBINED WITH the query that you enter in the module screen.
- If you were to select Open WO's only, then if you were to go to the work order module and do a query for work orders for building 1, you would see only work orders for building 1 that are STILL OPEN. You will NEVER see closed, completed, cancelled or other 'non open' work orders if this criteria is turned on!!

1.7.2 Query Sort Order

The QUERY SORT ORDER setting allows you to specify the default ORDER of the records returned in the query results for each module.

- Select the Module from the drop down list, and you will have a list of available fields in the Order Field to choose from.
- Select Ascending or Descending from the Order drop down to choose the default order (smallest/lowest to highest or highest/largest to lowest).



1.7.3 Maximum Query Records

By default, when running a query in any Web Work module, if the results contain more than 100 matching records you will be prompted with a box that says “Your query returns more than 100 records. Click **OK** to see the first 100 records or **Cancel** to retrieve all records.”

This feature is enabled to prevent people from making queries that return 1000's of records, which would take a long time to render in their browser and possibly affect the overall performance of Web Work for other users on their database.

- Select the module from the dropdown.
- Enter the maximum number of records to be returned from your queries. Entering 0 will return ALL records matching your query.



1.7.4 Operation Mode after creating new record

When adding records to the system, you have the option after saving the record of 'continuing' entering new records (new mode), or saving the record and then remaining with that record on the screen in Edit mode (edit mode).

- Select the module from the module drop down and your preferred operation mode.

1.7.5 Keep Resources Window Open

When entering resources on a record (i.e.: time and materials on a work order), you can choose to have the data saved, and the resource window remains open for entering additional items, or you can have it accept only a single entry, save, close the window and return you to the module screen.

- Select the module from the dropdown, and specify YES or NO in the KEEP WINDOW drop down.

1.7.6 Toggle Prompt on Saving Procedure

When you make changes to a procedure, if that procedure is already used on a PM record, the changes to the procedure will be written to the PM as well. If you turn the prompt 'OFF', then these changes will be made automatically to the PM record(s) without any warning. If you turn the prompt 'ON', then you will be prompted when you save the procedure that you will also be updating any related PM records.

1.7.7 Change Password

Click on the Change Password option to change your login password.

- Enter your new password in the PASSWORD box.
- Re-Enter your new password in the Confirm PASSWORD box
- Click SAVE to save your new password or cancel to quite without changing.