

Work Orders Module

Work Orders can be manually generated from the Work Requests or Work Orders modules or they can be generated automatically by performing a PM generation. However a work order is created, their details can be updated or modified from the Work Orders module. This Chapter describes how to use the Web Work, Work Orders module.

Table of Contents

3.1	OVERVIEW OF THE WORK ORDERS MODULE.....	3
3.2	CREATING NEW WORK ORDERS.....	4
3.2.1	TO CREATE A NEW WORK ORDER	4
3.2.2	CHANGING THE STATUS OF A WORK ORDER	5
3.2.3	UNDERSTANDING WEB WORK STATUSES	7
3.2.4	WORK ORDER STATUS HISTORY	8
3.3	ADDING ESTIMATES TO A WORK ORDER	8
3.3.1	ADDING ESTIMATES - TASKS	8
3.3.2	ADDING ESTIMATES - LABOUR	10
3.3.3	ADDING ESTIMATES - MATERIALS.....	11
3.3.4	ADDING ESTIMATES - TOOLS	14
3.4	REPORTING ACTUALS ON WORK ORDERS.....	15
3.4.1	ADDING ACTUALS - TASKS	15
3.4.2	ADDING ACTUALS - LABOUR	17
3.4.3	ADDING ACTUALS - MATERIALS	18
3.4.4	ADDING ACTUALS - TOOLS.....	21
3.4.5	COPYING ESTIMATES TO ACTUALS	22
3.4.6	EDITING ESTIMATES AND ACTUALS.....	23
3.5	UPDATING PROCEDURES.....	24
3.5.1	CREATING NEW PROCEDURE FROM ACTUALS OF A WORK ORDER.....	25
3.5.2	UPDATING EXISTING PROCEDURE WITH ACTUALS OF A WORK ORDER.....	25
3.6	WORK ORDER ACCOUNTS.....	26
3.6.1	APPLYING COSTS OF A WORK ORDER TO MORE THAN ONE ACCOUNT	26

- 3.7 COMPLETING WORK ORDERS 28**
 - 3.7.1 COMPLETING A SINGLE WORK ORDER..... 28
 - 3.7.2 COMPLETING WORK ORDERS BY BATCH – BATCH COMPLETE (QUERY)..... 29
- 3.8 CLOSING WORK ORDERS 31**
 - 3.8.1 TO CLOSE WORK ORDERS:..... 31
- 3.9 WORK ORDER STATUS HISTORY 32**
- 3.10 EMAILING WORK ORDER REMINDERS..... 33**
- 3.11 PRINTING WORK ORDERS..... 35**
 - 3.11.1 TO PRINT ONLY THE WORK ORDER THAT IS CURRENTLY DISPLAYED ON THE SCREEN: 35
 - 3.11.2 TO PRINT BATCH OF WORK ORDERS THAT ARE SELECTED IN YOUR QUERY RESULT..... 36
- 3.12 WORK ORDER CALENDARS 36**
- 3.13 MODIFYING EQUIPMENT..... 38**

3.1 Overview of the Work Orders module

The Work Orders module is used to manage work orders. Work Orders capture all information required to perform a job. Work Orders also act as cost centers for report writing. Work Orders can never be deleted from Web Work (only archived), so any history captured by a work order can be viewed and analyzed at any given time.

Click on the **Work Order** button on the menu bar on the left hand side of the screen to access the Work Order module.

When you enter the Work Order module you will be in Query mode as shown in the screen below:

The screenshot shows the 'Work Order Module' interface. It features a navigation menu on the left with categories like Home, Work Request, Work Order, Forecast, etc. The main area contains a form with fields for:

- Work Order Number, Procedure, Priority, Fault Code 1, Work Type, PM Number, Status
- Location ID, Equipment ID, Meter Reading, Stop Operator, Position, Down's Title, Requester
- Contact, Contact Phone, Account, Est. Cost, Department, Open Date, Target Date, Close Date, Duration (line), Project ID, Cost, Manager, Class, Employee, Phase
- Notes (Note1-5) and Data Division, Comp Remark, Code

 A yellow callout box on the right contains the following instructions:

- Click on the query button to select information from the Web Work database.
- Click on any field name to open the help window for that field.
- Enter information into any field and then click on the LOOKUP button to query the database for records matching the criteria you selected.

The **Operations Resources Tools Help** drop down menus contain the various features available in the Work Orders module.

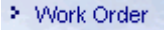



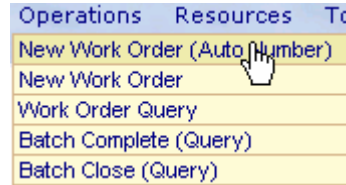
Web Work includes "help files" for all field names. To access these help files click on the field name. A popup window will open displaying help for the field selected.

3.2 Creating New Work Orders


Work Orders can be created from Work Requests or they can be created in the Work Orders module. Preventive Maintenance Work Orders can also be created in the PM module. See the PM's Chapter of this manual for more information on PM Work Orders.

3.2.1 To create a new Work Order

- Click on the  Work Order module button to access the Work Orders module.
- Move mouse over the  Operations menu option button to display the list of options.
- Select **New Work Order (Auto Number)** from the drop down menu.




OR

- Click on the  button at the bottom right hand side of the screen. You will be in **New** mode.
- If you have an appropriate procedure already available, enter the procedure code into the procedure field. This will help you develop your information faster (for more information on setting up Procedures, refer to the Procedures section in this manual).



Work Orders auto numbering can be set up with a specified number of digits, prefixes, etc. See: [Operations, Set Auto-Number in the Admin. module](#) for more information on this feature.

- Enter information into the fields displayed on the screen. Only the Work Orders number, the work orders description, WO Type and Open Date fields are mandatory. For help on using the fields just click the label for the field in question to get more details.
- Click on the  button at the bottom right hand side of the screen to save the new Work Order record.
- Once you save the new Work Order, you will then be in **Edit** mode: you can edit and resave the WO record, add resources to the WO record, print the WO record or continue working in the module of your choice by clicking on the module button on the left hand side of the screen.



Double click on the WO description field to open a larger popup window for this field.



A default Priority code such as WAPPR (Waiting Approval) can be set up. See [Admin. – System Defaults](#) for more information. A default Work Order type such as RM (Regular Maintenance) can be set up. See [Admin. – System Defaults](#) for more information.

3.2.2 Changing the Status of a Work Order



As a work order flows through the system of your organization, its status may require changing a number of times. i.e.: From new work order, to approved work order, to pending work order, to completed work order. The Web Work Change Status functionality is used to make these work order status changes.

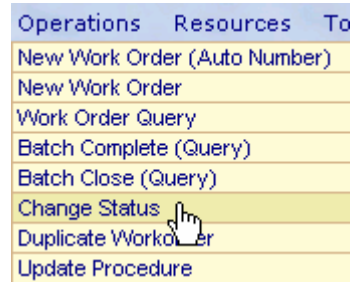
There are five main categories the statuses belong to (refer to the Admin. Chapter: Work Orders Status Codes for more information on how to setup new Work Orders status codes). The categories are:

- WTAPPR (Waiting Approval)
- APPR (Approved)
- COMP (Completed)
- CLOSE (Closed)
- CANC (Cancelled)


Each category already has at least one work order status code - you may add to this list by creating your own status codes for each relevant category.

To change status on an existing Work Order:

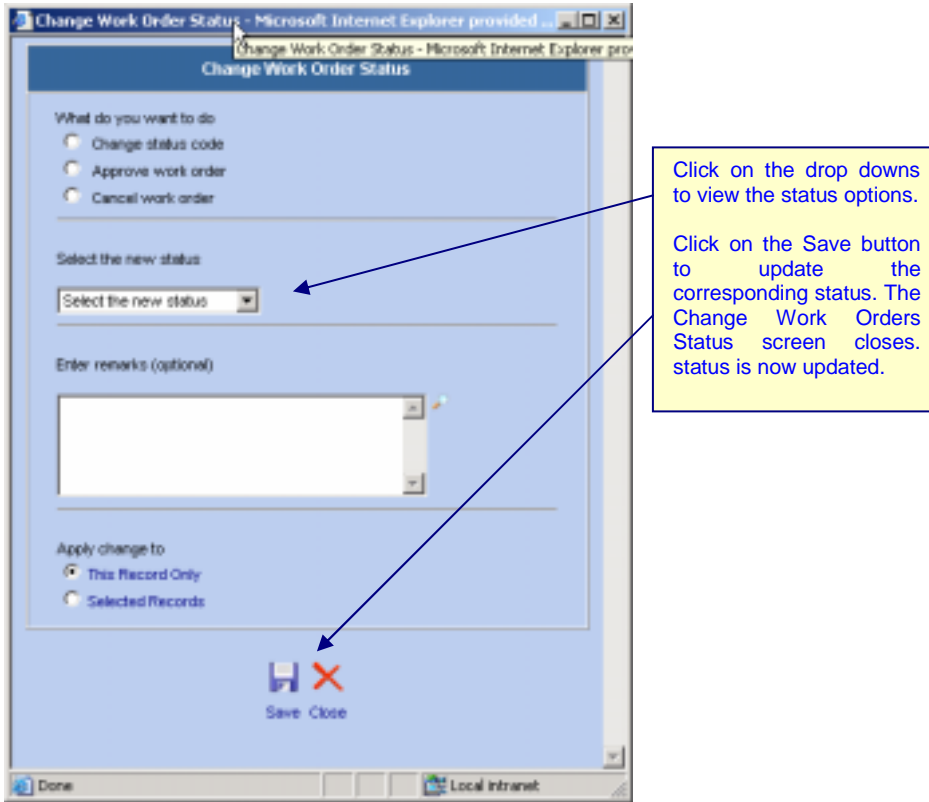
- Click on the  module button to access the Work Orders module.
- Perform a work orders query to locate and retrieve the work order or work orders you want to change a status to.
- Click on the  menu and select [Change Status](#) from the drop down menu.




OR

- Click on the  button at the bottom right hand side of the screen.

- The Change Work Orders Status screen comes up as seen here:



Work Orders must have a status of Approved before Actuals can be added to them.

- Click on a **RADIO** button to select what you want to do. The choices will vary depending on the current status of the work order. You must pick one.
- Click on the down arrow to “Select the new status”.
- Add status change comments into the Status Remarks section, if any.
- Click on the **RADIO** button beside This Record Only or All Selected Records.
- Click on the  button to update the status. The [Change Work Orders Status](#) window will close and you will be returned to the main screen of the work order.

NOTE: Your selected status will now appear in the [Status](#) field and the category the status is part of will appear on the bottom right hand side of the screen.



If your organization wishes to have Work Orders approved automatically when created, Web Work can be setup to automatically perform this task. See the System Admin. – System Defaults section of this manual for more information on setting up this feature.

3.2.3 Understanding Web Work statuses

Web Work comes loaded with system work order statuses. The table below explains what each status is intended to do:

Status	Description	Category	Brief Explanation
New Req	New Request	WTAPPR	<ul style="list-style-type: none"> >Can be changed within the WTAPPR Category >Can be changed to a status from APPR category >WO Type field is missing >Estimates can be added >Can be Approved >Can be Cancelled
New WO	New Work Order	WTAPPR	<ul style="list-style-type: none"> >Can be changed within the WTAPPR Category >Can be changed to a status from APPR category >Estimates can be added >Can be Approved >Can be Cancelled
WTAPPR	Waiting for Approval	WTAPPR	<ul style="list-style-type: none"> >Can be changed within the WTAPPR Category >Can be changed to a status from APPR category >Estimates can be added >Can be Approved >Can be Cancelled
APPR	Approved	APPR	<ul style="list-style-type: none"> >Estimates cannot be edited >Actuals can be added >Can be turned back to WTAPPR Category >Can be changed to a status from APPR category
COMP	Completed	COMP	<ul style="list-style-type: none"> >The WO record cannot be changed >The comp date field has a date entered >Can be changed to status within the COMP category >Can be changed to status within the CLOSE category >Can be re-opened by changing to a status within the WTAPPR Category
CLOSE	Closed	CLOSE	<ul style="list-style-type: none"> >the record is locked, no changes can be made >the record is hidden from everyday viewing, but may be viewed by turning off a filter within Work Orders module
CAN	Canceled	CAN	<ul style="list-style-type: none"> >Work order cannot be deleted, instead work orders with zero cost can be canceled >the record is locked, no changes can be made >The record is hidden from everyday viewing, but may be viewed by turning off a filter within Work Orders module



If your systems default, Auto Approve Work Orders, is set to YES - then most of rules described above are no longer valid. The user can edit information and change statuses without much consistency. Tero recommends performing a business analysis and obtaining full understanding of the consequences when using the Auto-Approve Work Orders feature. Refer to the Admin. Chapter – System Defaults Setup.

3.2.4 Work Order Status History


To view the status history for a work order:

- Perform a Work Orders query to locate and retrieve the work orders you want to see Status History for.
- Move your mouse over the Resources menu and select [Status History](#) or click [Status History](#) tab button as seen here.



- A screen similar to the one below opens up:

Date/Time	Status	Changed By	Remarks
26/07/2005 11:45:30 AM	APPR	DBA	Approve.
18/07/2005 4:18:31 PM	NEWWO	DBA	New work order created

- The first column shows the date and time of the status change. The second column shows the changed status. The third column shows the name of the user who performed the status change. The last column shows the status remarks for each status.
- To exit Work Orders status history and return to the main screen, click on the  button.

3.3 Adding Estimates to a Work Order

Estimates can be added to a work order to indicate the tasks, labour and materials required to complete a work order. The status of the work order must be within the WTAPPR category (including NEWREQ, NEWWO, WTAPPR or other user defined statuses).

3.3.1 Adding Estimates - Tasks

By adding tasks to a work order, the employee assigned to complete a work order will be provided with a checklist of step by step instructions for completing the work.


To add estimated Work Order Tasks:

- Perform a Work Order query to locate and retrieve the work orders you want to add Estimates for.
- Move your mouse over the [Resources](#) menu and select Estimates or click on the [Estimates](#) tab as seen here.



- Click on the [Tasks](#) tab (by default you will already be under Tasks). The following screen comes up:


Tasks Labour Materials Tools			
Select all		Unselect all	
Task Number	Description	Task Memo	
<input type="checkbox"/> 1	test 1	test1	

- Click on the  button to add a new task. The [New Work Order Task](#) screen comes up.
- Enter the [task number](#). This can be an alpha or numerical number. The number will sort the tasks.
- Enter an [account](#) for the task, if applicable.



Leave the account field blank if this task is going to be split between multiple accounts. See [Work Orders – Accounts](#) for more information.



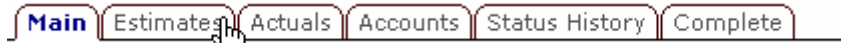
- Enter a full [description](#) for the task.
- To provide additional details regarding the Description, use the [Task memo](#) field (i.e.: Safety information, MSDS information, etc.).
- Enter the Measure Unit if you would like to track a task by a unit of measure; measure unit can also be considered to track the task performance. Click on the  lookup icon to select a measure unit from the Web Work database. i.e.: SQFT (square feet) for painting a wall, ACRES for grass cutting
- Enter the Unit Cost for the measure unit chosen. This is the cost per unit.
- Enter the Quantity of measure units required for this task.
- The Total Cost will be automatically calculated from the unit cost and quantity of measure units.

3.3.2 Adding Estimates - Labour

The work force allocation can be estimated within the Labour section of Work Order Estimates. The labour allocation may estimate individual employees, requestors, crafts and vendors.

To estimate Work Order labour:

- Perform a work orders query to locate and retrieve the work orders you want to add Estimates for.
- Move your mouse over the **Resources** menu and select Estimates or click on the **Estimates** tab as seen here.



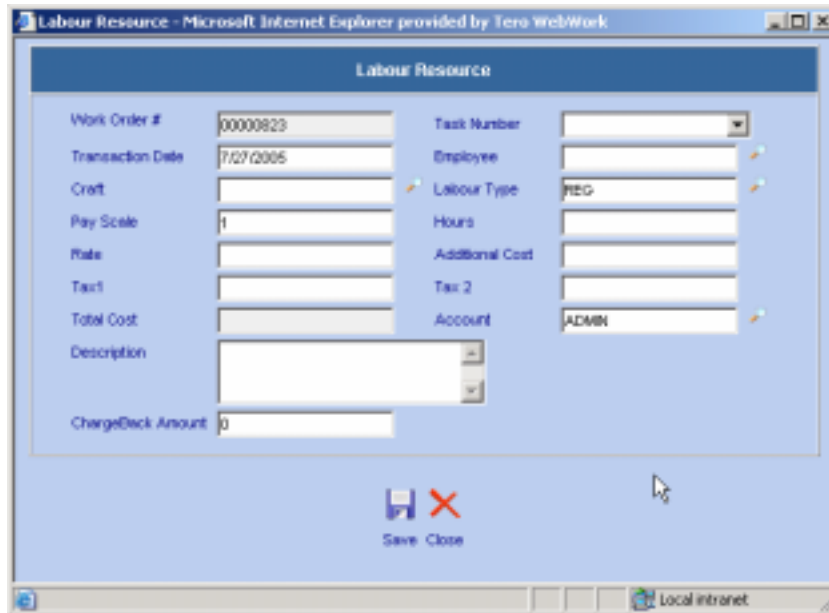
- Click on the Labour tab. The following screen comes up:





Select all Unselect all

	Transaction Date	Employee	Description	Account	Rate	Additional Cost	Hours	Total Cost
<input type="checkbox"/>	10/5/2000	DF	J JJWF JWW NWQHGWH W	PLUMB	\$17.00	\$0.85	1	\$17.85
<input type="checkbox"/>	10/5/2000	DWT		ADMIN	\$23.00	\$2.30	2	\$48.30
							Total	\$66.15

- Click on the  button. The **Labour Resource (estimate labour)** screen comes up.




- To assign Labour allocation to a unique task, pick the appropriate task from the **Task Number** drop down menu.
- If applicable, specify exact date when the labour is to be allocated within the **Transaction Date** field.
- Assign the employee within the **Employee** field. The Employee may be an employee, a requestor or a vendor or leave blank if only craft is assigned.
- Enter the **Craft** into the craft field. If the employee is associated to a craft already, the craft field will auto-populate.
- Specify the **Labour Type** (i.e. REG is regular time, but there may be other types available like Overtime).
- Enter the estimated number of hours into the **Hours** field.
- **Rate** comes up automatically with the Employee or the craft picked. You may overwrite the **Rate** if needed.
- Enter any **Additional Costs** in Dollars, if any.
- **Taxes 1 & 2** calculate automatically, but may be manually changed.
- Enter **account** for this one labour estimate if applicable.
- **Description** is the description of the employee or the craft picked and comes up automatically. You can change or add to this description.
- Enter **chargeback** amount if applicable.
- Click on the  button to add the new Labour to the Work Order Labour estimates.
- Repeat the above steps to continue estimating Labour, proceed to the other estimates screen or click the  to return to Work Orders main screen.

3.3.3 Adding Estimates - Materials

The estimates on the job may include materials. Materials include inventory stock and non-stock items and non-inventory items as well.

To estimate Work Order Materials:

- Click on the  module button to access the Work Orders module.
- Perform a Work Orders query to locate and retrieve the work orders you want to add Estimates for.
- Move your mouse over the **Resources** menu and select Estimates or click on the **Estimates** tab as seen here.



- Click on the Material tab. A similar screen comes up:




Select all Unselect all

	Issue Date	Item Number	Description	Account	Quantity	Issue Price	Extension
<input type="checkbox"/>	10/5/2000	66602	st KJSVBWVWQWQTWQR	PLUMB	15	\$3.50	\$63.53
<input type="checkbox"/>	10/5/2000	E-FL-3V353	48 INCH FLUORESCENT LAMP	GEN	1	\$22.00	\$26.62
Total							\$90.15

- Click on the  button. The [Material Resource \(estimate materials\)](#) screen comes up.


Material Resource


Work Order #	<input type="text" value="00000130"/>	Task Number	<input type="text" value=""/>
Issue Date	<input type="text" value="9/19/2005"/>	Storeroom	<input type="text" value="MAN"/>
Item Number	<input type="text" value=""/>	Serial Number	<input type="text" value=""/>
Issue Price	<input type="text" value=""/>	Issue Unit	<input type="text" value=""/>
Quantity	<input type="text" value=""/>	Additional Cost	<input type="text" value=""/>
Tax1	<input type="text" value=""/>	Tax2	<input type="text" value=""/>
Account	<input type="text" value=""/>	Extension	<input type="text" value=""/>
Description	<input type="text" value=""/>		
Charge Back	<input checked="" type="checkbox"/>		
Markup Amount	<input type="text" value=""/>	ChargeBack Tax1	<input type="text" value=""/>
ChargeBack Tax2	<input type="text" value=""/>	ChargeBack Amount	<input type="text" value=""/>

Save Close

- To assign Material allocation to a unique task, pick the appropriate task from the Task Number drop down menu.
- If applicable, specify exact date when the Materials are to be allocated within the Issue Date field.

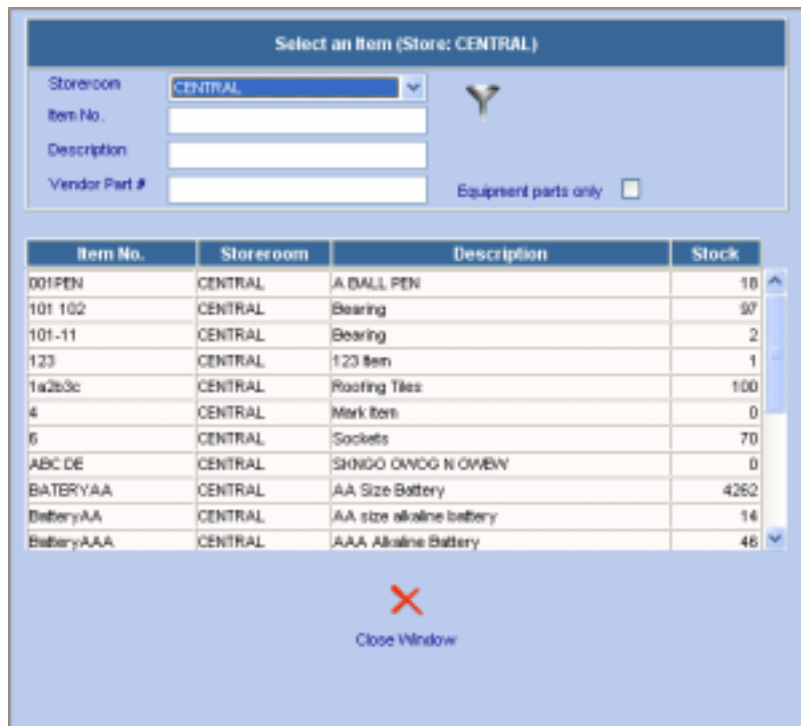
- If you are entering a Stock Inventory Item then enter a storeroom or click on the  lookup icon to select a storeroom from the Web Work database. FOR NON INVENTORY ITEMS, LEAVE THE STOREROOM FIELD BLANK (or erase the default if it is already populated!)

- Enter an Item Number or on the  lookup icon to select an Item Number from the Lookup screen as seen here.



For **Stock Inventory** Items:
enter a Storeroom

For **Non-Stock Inventory** Items:
enter Storeroom = "ALL"

For **Non-Inventory** Items:
enter Storeroom = "None"



Item No.	Storeroom	Description	Stock
001PEN	CENTRAL	A BALL PEN	10
101 102	CENTRAL	Bearing	97
101-11	CENTRAL	Bearing	2
123	CENTRAL	123 Item	1
1a2b3c	CENTRAL	Roofing Tiles	100
4	CENTRAL	Mark Item	0
6	CENTRAL	Sockets	70
ABC DE	CENTRAL	SHINGO ONOG N OMBV	0
BATERYAA	CENTRAL	AA Size Battery	4262
BatteryAA	CENTRAL	AA size alkaline battery	14
BatteryAAA	CENTRAL	AAA Alkaline Battery	46

- Enter the quantity. The tax and extension fields will be calculated automatically.
- Enter any additional cost. When an additional cost is added, the tax and extension field will automatically be recalculated.
- Enter Tax 1 and 2, if applicable. (If taxes are entered the total will automatically be recalculated.)
- Enter an account if applicable or click on the  lookup icon to select an account from the Web Work database.
- The description field will automatically populate with the description of the Inventory item selected or you can type in the Item Description yourself.
- Check the Chargeback box if this material is to be part of the chargeback for the Work Order.
- Enter a markup amount if the amount charged back is to include a markup.
- Taxes and the Chargeback amount will be automatically calculated based on the item cost and the markup – however you can over-ride by typing in these boxes as well.
- Click on the  save icon at the bottom right hand side of the screen to save the material estimate.

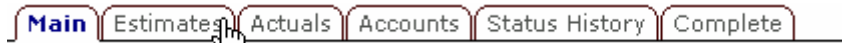


To enter a non-inventory item, leave the Storeroom field blank and enter information into the other fields as required.

3.3.4 Adding Estimates - Tools


Tools are items that get used to accomplish the job, but do not remain there as part of the job. Therefore, the cost of these objects should not be included in the total cost of the work order, only the Tool cost. In Web Work, tools may be identified as pieces of equipment or users may assign tools right into the Tools screens.

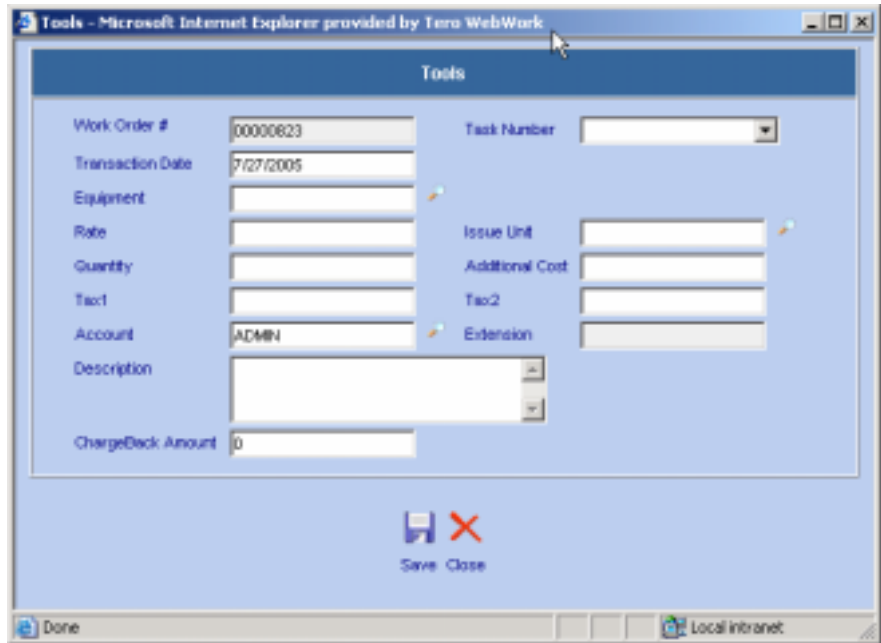
- Click on the [Work Order](#) module button to access the Work Orders module.
- Perform a Work Orders query to locate and retrieve the work orders you want to add Estimates for.
- Move your mouse over the [Resources](#) menu and select Estimates or click on the [Estimates](#) tab as seen here.






- Click on the Tools tab. The following screen comes up:

Transaction Date	Equipment	Description	Account	Extension
			Total	\$0.00

- Click on the  button. The [Tool Resource \(estimate tool\)](#) screen comes up:
- To assign Tools allocated to a specific task, pick the appropriate task from the [Task Number](#) drop down menu.
- If applicable, specify exact date when the Tools are needed within the [Transaction Date](#) field.



- **For Tools defined as Equipment:** Click on the  button to select the existing Equipment from a list. Once picked, the [Account](#) and [Description](#) of the Equipment comes up automatically.

- **For Tools not previously defined:** enter a value into the [Equipment](#) field that does not match any equipment code. Also, the [Account](#) field and Description field should be manually populated with relevant information.
- Enter the [Rate](#) at which this Tool is to be charged out at.
- Enter the [Issue unit](#) by which this Tool is to be used by.
- Enter the number of Tools needed into the [Quantity](#) field.
- Enter any additional costs involved on top into the [Additional Costs](#) field, if applicable.
- [Taxes 1 & 2](#) calculate automatically, but may be manually changed.
- Enter [chargeback](#) amount, if applicable.
- Click on the  button to add the new Tools to the Work Order Tools estimate.
- Repeat the above steps to continue estimating Tools, then proceed to the other Estimates screen or click the  button to return to the Work Orders main screen.


3.4 Reporting Actuals on Work Orders

Use the Work Order – Actuals feature to add actual Tasks, Labour, Materials and Tools back to a work order. The work order has to be within an Approved status category at this point. To ease data input, you can copy existing estimates into Actuals and modify the Actuals to match what really happened. The estimates may be similar to the Actuals, but may not necessarily be the same.

3.4.1 Adding Actuals - Tasks

The worker used the estimated tasks to perform the job correctly. By adding actual Tasks, a record is kept of what the worker really did on the job.


To report Work Order Actual Tasks:


- Click on the  module button to access the Work Orders module.
- Perform a Work Orders query to locate and retrieve the work orders you want to report Actuals to.
- Move your mouse over the [Resources](#) menu and select Actuals or click on [Actuals](#) tab as seen here .





- Click on the **Tasks** tab (by default you will already be under Tasks). The Following screen comes up:


Task Number	Description	Task Memo
001	XNVVVOI NWOJ	NSVW WOGWQ

- Click on the  button. The **New Work Order Task** screen comes up as seen here.
- Enter the **task number**. This can be an alpha or numerical number. The number will sort the tasks.
- Enter an **account** for the task, if applicable.

 Leave the account field blank if this task is going to be split between multiple accounts. See **Work Orders – Accounts** for more information.



- Enter a full **description** for the task.
- To provide additional details regarding the Description, use the **Task memo** field (i.e.: Safety information, MSDS information, etc.)
- If the task can be measured, enter the **Measure Unit** (i.e. when laying asphalt, measure unit is meters).
- If the task has its own costs allocated, enter the amount to the **Unit Cost** field.
- To record the time the Task took, enter the value (in hours) into the **Task Hour** field.
- Click on the  button to add the new task to the Work Order Task Actuals.
- Repeat the above steps to continue reporting Actuals Task, proceed to the other Actuals screen or click the  button to return to the Work Orders main screen.

 If you're estimated tasks are the same or somewhat similar to the reported Actuals, you can pass the Estimates over to Actuals to save time data-entering (refer to **Copying Estimates to Actuals** section later in this chapter for further information).

3.4.2 Adding Actuals - Labour

Individual employees, requestors, craft and vendors could have been involved on completing the job. This information needs to be added to the Web Work database for history. The Work Order Actuals – Labour section is where we track this information.

To report Work Order Actuals Labour:


- Click on the **Work Order** module button to access the Work Orders module.
- Perform a Work Orders query to locate and retrieve the work orders you want to report Actuals to.
- Move your mouse over the **Resources** menu and select Actuals or click on **Actuals** tab as seen here .

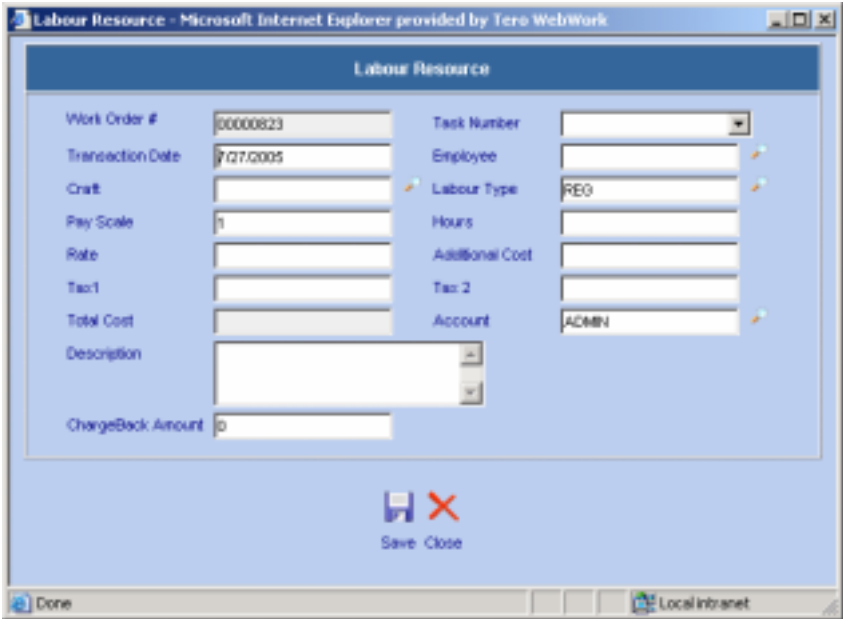




- Click on the Labour tab. The Following screen comes up:



Transaction Date	Employee	Description	Account	Rate	Additional Cost	Hours	Total Cost
8/27/2001	MIKE		ADMIN	\$34.00	\$0.00	1	\$34.00
						Total	\$34.00

- Click on the  button. The **Labour Resource (actual labour)** screen comes up:
- To assign Labour allocation to a unique task, pick the appropriate task from the **Task Number** drop down menu.
- If applicable, specify exact date when the labour was allocated within the **Transaction Date** field.



- Assign the employee within the [Employee](#) field. An Employee may be an employee, a requestor or a vendor or leave blank if only craft is assigned.
- Enter the [Craft](#) into the craft field. If an employee is associated to a craft already, the craft field will auto-populate.
- Specify the [Labour Type](#) (ie. REG is regular time, but there may be other types available like Overtime).
- Enter the estimated number of hours into the [Hours](#) field.
- [Rate](#) comes up automatically with the employee or the craft picked. You may overwrite the [Rate](#) if needed.
- Enter any [Additional Costs](#) in Dollars, if any.
- [Taxes 1 & 2](#) calculate automatically, but may be manually changed.
- Enter [account](#) for this one labour estimate if applicable.
- [Description](#) is the description of the employee or the craft picked and comes up automatically. You can change or add to this description.
- Enter [chargeback](#) amount if applicable.
- Click on the  button to add the new Labour to the Work Order Actuals Labour.
- Repeat the above steps to continue reporting Actuals Labour proceed to the other Actuals screen or click the  button to return to the Work Orders main screen.




If estimated labour is the same or somewhat similar to the reported Actuals, you can pass the Estimates over to Actuals to save time data-entering (refer to *Copying Estimates to Actuals* section of this chapter for further information).

3.4.3 Adding Actuals - Materials

You can use Actual Materials to record the cost of materials used on the job. Note that any Materials issued directly to the work order will already appear on the Actual Material list.

To report Work Order Actuals - Material:

- Click on the  module button to access the Work Orders module.
- Move your mouse over the [Resources](#) menu and select Actuals or click on [Actuals](#) tab as seen here .



- Click on the Material tab. A similar screen comes up:

Tasks Labour **Materials** Tools

Select all Unselect all

	Issue Date	Item Number	Description	Account	Quantity	Issue Price	Extension
<input type="checkbox"/>	10/5/2000	66602	st KJSVBW WQWQTWQR	PLUMB	15	\$3.50	\$63.53
<input type="checkbox"/>	10/5/2000	E-FL-3V353	48 INCH FLUORESCENT LAMP	GEN	1	\$22.00	\$26.62
Total							\$90.15

- Click on the  button. The [Material Resource \(actual materials\)](#) screen comes up.


Material Resource


Work Order #	<input type="text" value="0000130"/>	Task Number	<input type="text" value=""/>
Issue Date	<input type="text" value="9/19/2005"/>	Storeroom	<input type="text" value="MAIN"/>
Item Number	<input type="text" value=""/>	Serial Number	<input type="text" value=""/>
Issue Price	<input type="text" value=""/>	Issue Unit	<input type="text" value=""/>
Quantity	<input type="text" value=""/>	Additional Cost	<input type="text" value=""/>
Tax1	<input type="text" value=""/>	Tax2	<input type="text" value=""/>
Account	<input type="text" value=""/>	Extension	<input type="text" value=""/>
Description	<input type="text" value=""/>		
Charge Back	<input checked="" type="checkbox"/>		
Markup Amount	<input type="text" value=""/>	ChargeBack Tax1	<input type="text" value=""/>
ChargeBack Tax2	<input type="text" value=""/>	ChargeBack Amount	<input type="text" value=""/>

 Save Close

- To assign Material allocation to a unique task, pick the appropriate task from the Task Number drop down menu.
- If applicable, specify exact date when the Materials were used in the Issue Date field.

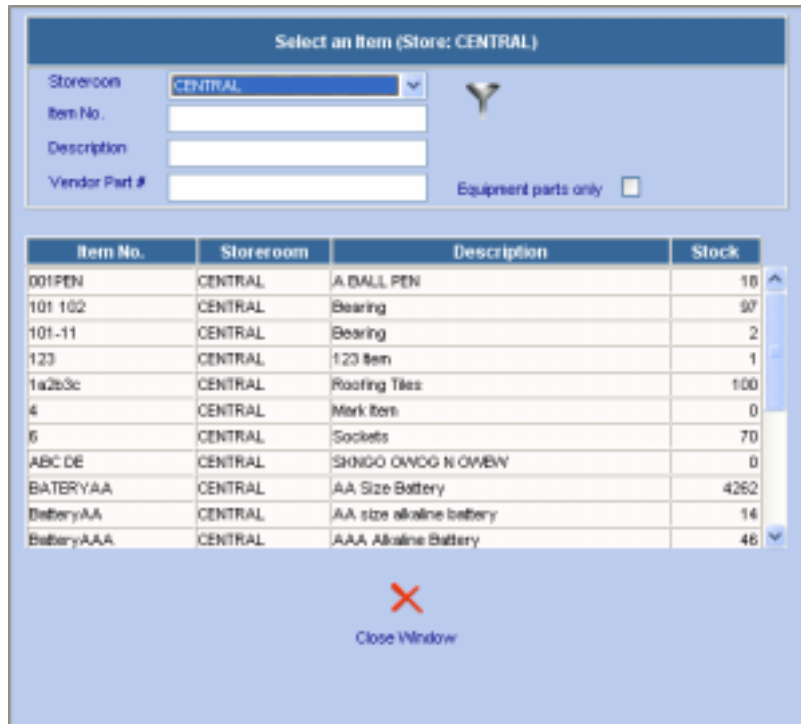
- If you are entering a Stock Inventory Item then enter a storeroom or click on the  lookup icon to select a storeroom from the Web Work database. FOR NON INVENTORY ITEMS, LEAVE THE STOREROOM FIELD BLANK (or erase the default if it is already populated!)

- Enter an Item Number or on the  lookup icon to select an Item Number from the Lookup screen as seen here.



For **Stock Inventory** Items:
enter a Storeroom

For **Non-Stock Inventory** Items:
enter Storeroom = "ALL"

For **Non-Inventory** Items:
enter Storeroom = "None"



Item No.	Storeroom	Description	Stock
001PEN	CENTRAL	A BALL PEN	10
101 102	CENTRAL	Bearing	97
101-11	CENTRAL	Bearing	2
123	CENTRAL	123 Item	1
1a2b3c	CENTRAL	Roofing Tiles	100
4	CENTRAL	Mark Item	0
6	CENTRAL	Sockets	70
ABC DE	CENTRAL	SHINGO ONDO N OMBV	0
BATERYAA	CENTRAL	AA Size Battery	4262
BatteryAA	CENTRAL	AA size alkaline battery	14
BatteryAAA	CENTRAL	AAA Alkaline Battery	46

- Enter the quantity. The tax and extension fields will be calculated automatically.
- Enter any additional cost. When an additional cost is added, the tax and extension field will automatically be recalculated.
- Enter Tax 1 and 2, if applicable. (If taxes are entered the total will automatically be recalculated.)
- Enter an account if applicable or click on the  lookup icon to select an account from the Web Work database.
- The description field will automatically populate with the description of the Inventory item selected or you can type in the Item Description yourself.
- Check the Chargeback box if this material is to be part of the chargeback for the Work Order.
- Enter a markup amount if the amount charged back is to include a markup.
- Taxes and the Chargeback amount will be automatically calculated based on the item cost and the markup – however you can over-ride by typing in these boxes as well.
- Click on the  save icon at the bottom right hand side of the screen to save the material estimate.



If the estimated tasks are the same or somewhat similar to the reported Actuals, you can pass the Estimates over to Actuals to save time data-entering (refer to *Copying Estimates to Actuals* section of this chapter for further information).

3.4.4 Adding Actuals - Tools

Report the actual Tools used on the job in the Work Order Actuals - Tools section.

To report Work Order Actuals - Tools:



- Click on the **Work Order** module button to access the Work Orders module.
- Perform a Work Orders query to locate and retrieve the work orders you want to add Actuals to.
- Move your mouse over the **Resources** menu and select Actuals or click on **Actuals** tab as seen here .

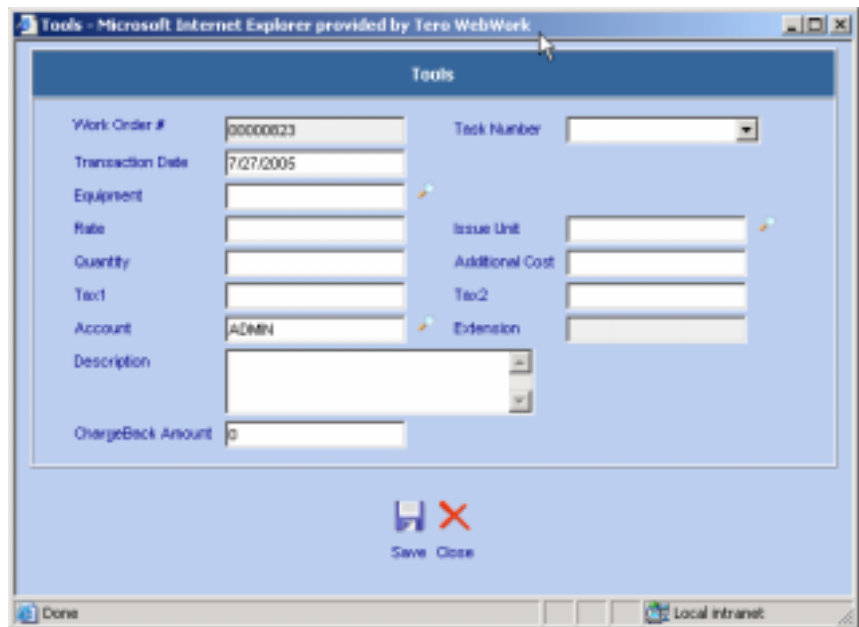




- Click on the Tools tab. The following screen comes up:



Transaction Date	Equipment	Description	Account	Extension
			Total	\$0.00

- Click on the  button. The **Tool Resource (actual tool)** screen comes up:
- To record Tools allocated to a specific task, pick the appropriate task from the **Task Number** drop down menu.
- If applicable, specify exact date when the Tools were used within the **Transaction Date** field.
- **For Tools defined as Equipment:** Click on the  button to select the existing Equipment from a list. Once picked, the **Account** and **Description** of the Equipment comes up automatically.




- **For Tools not previously defined:** enter a value into the [Equipment](#) field that does not match any equipment code. Also, the [Account](#) field and Description field should be manually populated with relevant information.
- Enter the [Rate](#) at which this Tool is to be charged out at.
- Enter the [Issue unit](#) by which this Tool is to be used by.
- Enter the number of Tools used into the [Quantity](#) field.
- Enter any additional costs involved on top into the [Additional Costs](#) field, if applicable.
- [Taxes 1 & 2](#) calculate automatically, but may be manually changed.
- Enter [chargeback](#) amount, if applicable.
- Click on the  button to add the new Tools to the Work Order Tools actuals.
- Repeat the above steps to continue entering Actual Tools, then proceed to the other Actuals screen or click the  button to return to the Work Orders main screen.

3.4.5 Copying Estimates to Actuals

If the job is estimated accurately, the Actuals may be similar or the same as estimated. To ease the data input process when reporting Actuals, you may take the existing Estimates and copy them over to Actuals. Then the copied Actuals may be edited to truly match what the worker has done.

To copy Work Order Actuals:

- Click on the  module button to access the Work Orders module.
- Perform a Work Orders query to locate and retrieve the work orders you want to add Estimates for.
- Move your mouse over the [Resources](#) menu and select Actuals or click on [Actuals](#) tab as seen here .




- You can now click on any of the tabs: Task, Labour, Materials or Tools and follow the next steps below. For our example we will use Tasks.



Select all Unselect all




	Task Number	Description	Task Memo
<input checked="" type="checkbox"/>	10	Plug out power socket	
<input checked="" type="checkbox"/>	20	Open back cover	
<input type="checkbox"/>	30	clear out dust in inside compartment	
<input checked="" type="checkbox"/>	40	add oil to motor	use 10w-30
<input checked="" type="checkbox"/>	50	replace back cover	
<input checked="" type="checkbox"/>	60	connect power	

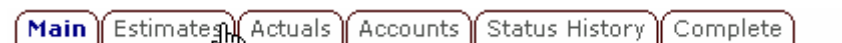
- Check off all the individual Tasks that are the same or similar to the reported Actuals.
- Click on the  button. The selected Estimated Tasks will be copied to the Actuals and the checkbox is no longer there.
- You can now edit the Actuals as described in detail in the next section.
- Repeat the same steps for the other tabs – the Labour, Material and Tools as required.

3.4.6 Editing Estimates and Actuals

Sometimes you may need to edit the Task, Labour, Material or Tools line after it's saved under Estimates or under Actuals.

To Edit Estimates or Actuals:

- Click on the  Work Order module button to access the Work Orders module.
- Perform a Work Order query to locate and retrieve the work orders you want to add Estimates for.
- EITHER:
- Move your mouse over the  Resources menu and select Estimates or click on the  Estimates tab as seen here.



OR

- Move your mouse over the **Resources** menu and select Actuals or click on **Actuals** tab as seen here .





- Click on the appropriate tab – Tasks, Labour, Materials, Tools.



Select all Unselect all

	Transaction Date	Employee	Description	Account	Rate	Additional Cost	Hours	Total Cost	
<input type="checkbox"/>	3/2/2000	2555	night shift		\$27.00	\$0.00	2.2	\$59.40	
<input type="checkbox"/>	3/2/2000	3555	overtime		\$32.00	\$0.00	1.25	\$40.00	
<input type="checkbox"/>	3/2/2000	TA	follow work procedure		\$27.00	\$0.00	1	\$27.00	
							Total	4.45	\$126.40

- Click on the appropriate line you wish to edit. A highlight appears when you put your mouse cursor over the line.
- Edit information as needed.
- Click on the  button when done and continue editing more lines or click on the  button to return back to the Work Orders main screen.

3.5 Updating Procedures

This menu item can be used to create a new procedure from the Actuals of a work order or to update the Estimates of the procedure used on that work order with the Actuals of that same work order.

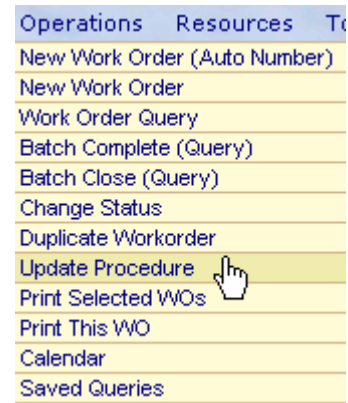
You can create a **New Procedure from the Actuals of a Work Order** when you find that the reported Actuals are something that repeats over time. To save time creating the procedure form from scratch, use this feature.


Other times you may use a procedure to populate the Estimates of a work order. Once the Actuals also get inputted, you may find that the Actuals reported are more accurate than the initial procedure is. In that case you may **Update the existing procedure with Actuals of a Work Order**.

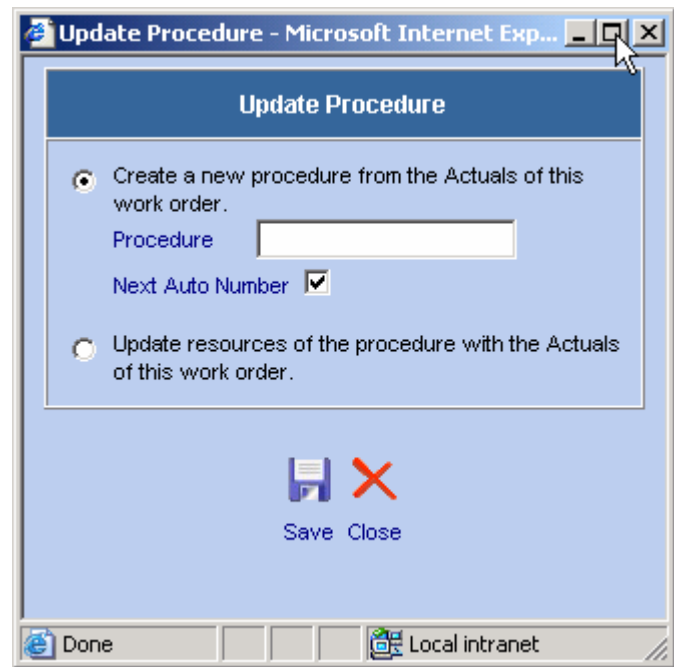
3.5.1 Creating new Procedure from Actuals of a work order

To create new Procedure from Actuals of a work order:

- Click on the **Work Order** module button to access the Work Orders module.
- Perform a Work Orders query to locate and retrieve the work order you wish to create a new Procedure from. Make sure the work order includes Actuals.
- Move your mouse over the **Operations** menu and select Update Procedure from the drop-down menu. The **Update Procedure** screen comes up as seen here.



- If your company is using auto-numbering for a procedure code, check off the **Next Auto Number** checkbox.
- If your company is manually coding the procedure codes, enter the code into the **Procedure** field.
- Click on the  button. A new procedure will be created with information taken from the current Work Order's Actuals.

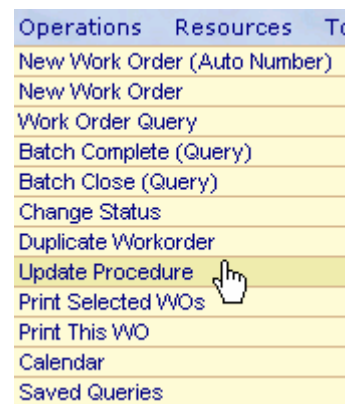



3.5.2 Updating existing procedure with Actuals of a Work Order

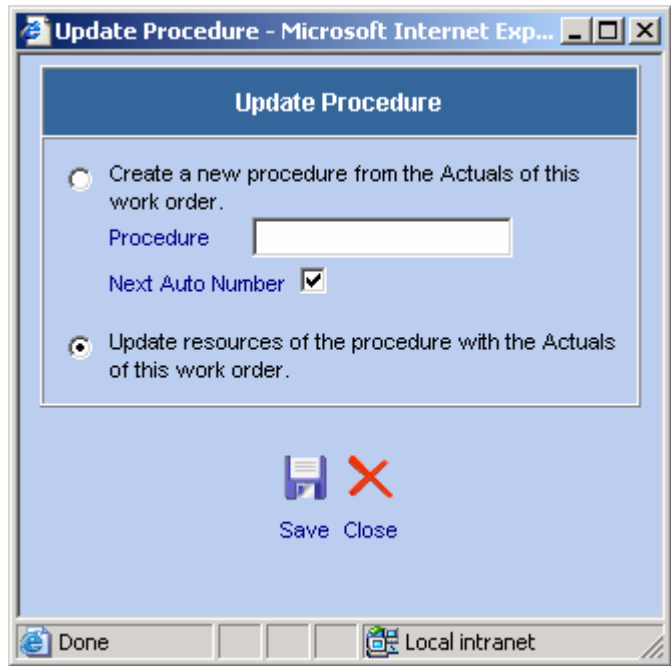
To update an existing Procedure with Actuals of a work order:

- Click on the **Work Order** module button to access the Work Orders module.

Perform a Work Orders query to locate and retrieve a work order you wish to use for updating the Procedure. Make sure the work order includes Actuals and the Work Order does have a procedure.



- Move your mouse over the **Operations** menu and select Update Procedure from the drop-down menu. The **Update Procedure** screen comes up.
- If your company is using auto-numbering for a procedure code, check off the **Next Auto Number** checkbox.
- If your company is manually coding the procedure codes, enter the code into the **Procedure** field.
- Click on the  button. The procedure associated to that work order will be updated with the Actuals of that Work Order.



When you update a procedure that has already been assigned to a PM, the procedure for that PM will be updated as well.

3.6 Work Order Accounts

A work order can be assigned to one account or to a variety of accounts depending on the accounting practices of your organization. If only one account will be used to apply the labour and materials for a work order, simply enter the applicable account in the Account field on the main work order screen.

Alternatively, you may add accounts for each estimated or actual Task, Labour, Material and Tool.

A third option is to assign a Work Order to multiple Resource Accounts. You can set the costing to never exceed either the percentage rate (a portion of the total cost – i.e.: 10%) or the cost total (an amount you choose - i.e.: \$223.00).

3.6.1 Applying costs of a work order to more than one account

- Click on the **Work Order** module button to access the Work Orders module.
- Perform a work orders query to locate and retrieve the work orders you want to add Accounts to.
- Move mouse over the **Resources** menu and select Estimates or click on Accounts tab as seen here.



- The Work Order Accounts screen, as pictured below, will open:


Main Estimates Actuals **Accounts** Status History Complete

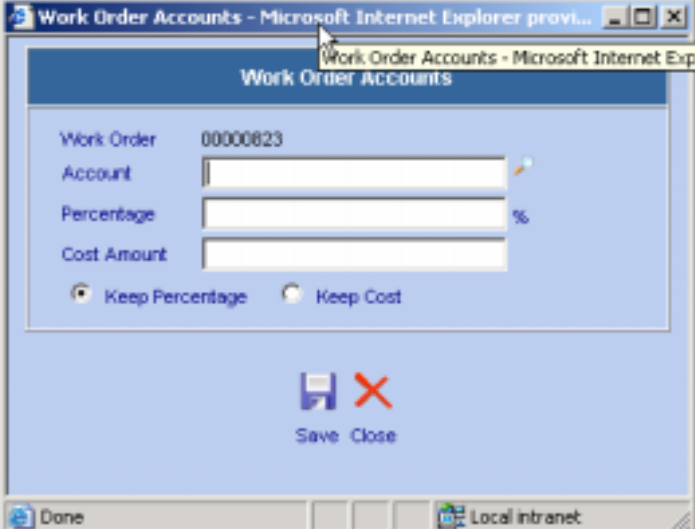
WO Number: 00000823 Test new estimated material transactions

Total Cost: 34



Account	Description	Cost	Percentage
ADMIN	zADMINISTRATIVE ACCOUNT	\$0.00	0%
LOCK	LOCKSMITH ACCOUNT	\$0.00	0%
Total		\$0.00	0%

- Click on the  button. The Add Work Order Accounts screen comes up:

- Enter the account code or use the  button to select the account from the list.
- For percentage based cost:** Click on the radio button besides [Keep Percentage](#). Enter the percentage of the work order that is to be charged to this account. Do not enter a percent sign, only the numerical value of the percent. The [Cost Amount](#) will be calculated based on the percentage of the total cost of the work order.
- For preset cost:** Click on the radio button besides [Keep Cost](#). Enter the actual cost to the Cost Amount field that is to be charged to this account. The Percentage will be calculated based on the total cost of the work order.




If [Keep Percentage](#) is selected, the costs assigned to the account will never exceed the selected percentage. If [Keep Cost](#) is selected, the cost assigned to the selected account will always stay the same.

- Click on the  button to save this account information. You can then return to the main work order screen by clicking on Main tab or you can continue assigning accounts to this work order by clicking on the  button and repeating the instructions.

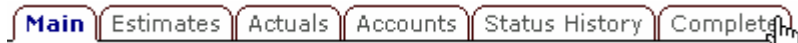
3.7 Completing Work Orders

When the work on a work order is finished, you should change its status to complete. This will signify the job has been done and remove it from the backlog. Actuals can still be added to the completed work order as invoices and timesheets come in.

3.7.1 Completing a single Work Order

To complete a single Work Order:




- Click on the **Work Order** module button to access the Work Orders module.
- Perform a work order query to locate and retrieve the work order you wish to complete. Make sure the work order is in an APPR category.
- Click on the **Complete** tab .



- A screen similar to the one pictured below will open:


complete (1 / 1)




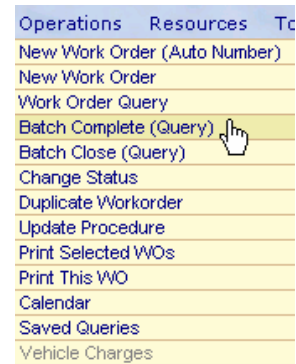
- Modifying the **Comp Date** is needed. It's the date the job was completed or when the work order's status changes to Completed category. You may also enter the time of the completion into the **Comp Time** field.
- Enter the latest **Meter Reading** of the equipment assigned to this work order, if known. Meter name comes up automatically.
- Enter the **Downtime** value reported for the equipment by the worker, if known.
- Click on the  button besides **Comp Remark** to select appropriate Completion Remark code from the lookup list, or just manually enter a completion remark into the large box, if any.
- Pick the correct **Fault Codes** from the **Fault Code** lookup lists, if any. The fault codes are usually viewed as Problem, Cause and Remedy.
- Select appropriate status from the **Status** dropdown list.
- Click on the  button to save the status with the additional information captured. The work order will then be in the COMP status category. Or click the  button to return to the Work Orders main screen without saving any changes.

3.7.2 Completing work orders by batch – Batch Complete (Query)

To complete Work Orders by a batch:



- Click on the  module button to access the Work Orders module.
- Click on the **Operations** menu and select **Batch Complete (Query)** from the dropdown menu. You will be in **Batch Complete: Query** mode.
- By default the Web Work system will select only work orders within the APPR category. You may still further define the query by dates etc... Perform a Work Orders query to locate and retrieve work orders that you want batch-


completed. Click on the  button to execute your query. The query look-up screen comes up:




Select all Unselect all Retrieve Records Order by: WoNum

	WO Number	Request	Location ID	Equipment ID	Status	Open Date
<input type="checkbox"/>	00000823	Test new estimated material transactions	CMI	EEE1	APPR	10/5/2000
<input type="checkbox"/>	00000824	Test new estimated material transactions	CMI	EEE1	APPR	10/5/2000
<input type="checkbox"/>	00000825	trim trees	WWV	100003	APPR	10/5/2000
<input type="checkbox"/>	00000826	trim trees	WWV	100003	APPR	10/5/2000
<input type="checkbox"/>	00000827	trim trees	WWV	100003	APPR	10/5/2000
<input type="checkbox"/>	00000828	Annual inspection	SB	00000001	APPR	10/5/2000

- Check off  each work order you wish to batch-complete or click on [Select all](#) to select all work orders.
- Click on [Retrieve Records](#) or the  button. The Batch Complete screen comes up. See sample picture below:

Comp Date 

Comp Remark 




Code

Remark

Status

Select all Unselect all

	WO Number	Request	Location ID	Equipment ID	Status	Open Date
<input checked="" type="checkbox"/>	00000823	Test new estimated material transactions	CMI	EEE1	APPR	10/5/2000
<input checked="" type="checkbox"/>	00000824	Test new estimated material transactions	CMI	EEE1	APPR	10/5/2000
<input checked="" type="checkbox"/>	00000825	trim trees	WWV	100003	APPR	10/5/2000
<input checked="" type="checkbox"/>	00000826	trim trees	WWV	100003	APPR	10/5/2000
<input checked="" type="checkbox"/>	00000827	trim trees	WWV	100003	APPR	10/5/2000

- Modifying the [Comp Date](#) is needed. It's the date the job was completed or when the work order's status changes to Completed category.
- Click on the  button besides [Comp Remark](#) to select appropriate Completion Remark code from the lookup list, or just manually enter a completion remark into the large box, if any.
- Select an appropriate status from the [Status](#) dropdown list.
- Click on the  button to apply the selected statuses to all work orders selected. The work order will then be in the COMP status category. Or click the  button to return to the Work Orders main screen without saving any changes.



Note that when Batch-Completing, Fault Codes, Downtime and Meter Readings cannot be reported. These values are unique to each work order. If you need to capture any or all of these values, you cannot batch-complete – use the single work order status change instead!!!


3.8 Closing Work Orders

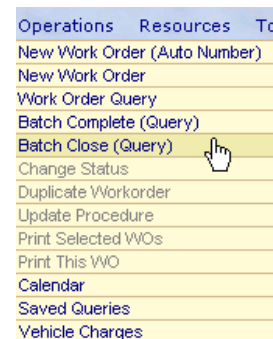
The [Batch Close \(Query\)](#) feature can be used to locate and close a single or multiple work orders with the criteria you select. Tero suggests that you set your Work Orders to a status of Complete when the work is done. When ALL the Actual: Task, Labour, Material and Tool costs have been entered to a work order it can then be set to status: Closed.


After a work order is Closed it is locked and cannot be edited or added to. If you want to edit the work order you must use the Change Status feature to re-open the work order.

By closing a work order, the work order is hidden from everyday use, but can always be brought back up by querying the record by the work order number directly, or by modifying User Settings under Help menu (see Overview chapter).

3.8.1 To close work orders:


- Click on the  Work Order module button to access the Work Orders module.
- Click on the [Operations](#) menu and select [Batch Close \(Query\)](#) from the dropdown menu. You will be in [Batch Close: Query](#) mode.
- By default the Web Work system will only retrieve work orders within the COMP category. You may still further define the query by dates etc... Perform a Work Orders query to locate and retrieve work orders that you want to Batch



Close. Click on the  button to execute your query. The query lookup screen comes up:

The screenshot shows the 'Work Order Module' interface. On the left is a navigation menu with categories like Maintenance, Assets, Inventory, Purchasing, Admin, Proj Mgmt, My Calendar, Help, and Logoff. The main area displays a table of work orders with columns for WO Number, Request, Location ID, Equipment ID, Status, and Open Date. The table contains 13 rows of data, with the first row being a duplicate. At the bottom of the table, it says 'batch close:query result (100 / 131)'. There are also icons for printing and refreshing at the bottom right of the table area.

WO Number	Request	Location ID	Equipment ID	Status	Open Date
<input type="checkbox"/> 00000141	This is a test of duplicate	MALL	INTR-COOLER-01	COMP	3/16/2000
<input type="checkbox"/> 00000144	Annual inspection	SB	00000001	COMP	3/16/2000
<input type="checkbox"/> 00000145	Replace flooring	WAY	ROOM025	COMP	3/22/2000
<input type="checkbox"/> 00000152	Routine inspection of water closet	MALL	INTR-HTR-GAS-01	COMP	3/24/2000
<input type="checkbox"/> 00000153	Fix leaking water pipes	MALL	WC-FLOOR-01	COMP	3/27/2000
<input type="checkbox"/> 00000384	Replace windows	BY	ROOM025	COMP	4/7/2000
<input type="checkbox"/> 00000385	Replace windows	BY	ROOM025	COMP	4/7/2000
<input type="checkbox"/> 00000387	Replace windows	BY	ROOM025	COMP	4/7/2000
<input type="checkbox"/> 00000388	Routine inspection of water closet	MALL	INTR-HTR-GAS-01	COMP	4/7/2000
<input type="checkbox"/> 00000389	Fix leaking water pipes	MALL	WC-FLOOR-01	COMP	4/7/2000
<input type="checkbox"/> 00000391	Replace windows	BY	ROOM025	COMP	4/7/2000
<input type="checkbox"/> 00000406	Fix the window	GYM		COMP	4/10/2000
<input type="checkbox"/> 00000411	Routine inspection and lubrication	BY	00000029	COMP	4/13/2000
<input type="checkbox"/> 00000412	Routine inspection and lubrication	BY	00000029	COMP	4/13/2000
<input type="checkbox"/> 00000414	Replace inspection and lubrication	CLASS	TRF 001	COMP	4/14/2000

- Check off each work order you wish to Batch Complete or click on [Select all](#) to select all work orders.
- Click on [Retrieve Records](#) or the  button. The Batch Complete screen comes up as seen here.




Operations Resources Tools Help **Work Order Module**

Remark

Status


Select all Unselect all

	WO Number	Request	Location ID	Equipment ID	Status	Open Date
<input checked="" type="checkbox"/>	00000829	Annual inspection	SB	00000001	COMP	10/5/2000
<input checked="" type="checkbox"/>	00000830	Routine inspection and lubrication	CAFE	ICE-001	COMP	10/5/2000
<input checked="" type="checkbox"/>	00001024	Replace windows Do some more work. More lines here.	EW	EW	COMP	10/5/2000

- Click on the  button besides [Remark](#) to select appropriate Closing Remark code from the lookup list, or just manually enter a closing remark into the large box, if any.
- Select appropriate status from the [Status](#) dropdown list.
- Note that you can still modify the list of work order to be closed by checking or un-checking the box beside the work order. Only work orders that are checked will close.
- Click on the  button to apply the selected status to all work orders selected. The work order will then be in the CLOSE status category. Or click the  button to return to the Work Orders main screen without saving any changes.

3.9 Work Order Status History

To view a work order's status history


- Click on the  module button to access the Work Orders module.
- Perform a work orders query to locate and retrieve the work orders you view status history for.
- Move your mouse over the [Resources](#) menu and select Estimates or click on [Status History](#) tab as seen here.



- The Work Order Status History screen, as pictured below, will open:

WO Number




Date/Time	Status	Changed By	Remarks
27/07/2005 1:39:18 PM	APPR	DBA	
27/07/2005 1:11:10 PM	NEWREQ	DBA	
13/03/2002 2:44:55 PM	CLOSE	dba	
12/03/2002	COMP	dba	

- The first column shows the date and time of the status change.
- The second column shows the changed status.
- The third column shows name of the user who performed the status change.
- The fourth column shows remarks of the status change.
- To exit Item Work Order status history click on the  button.

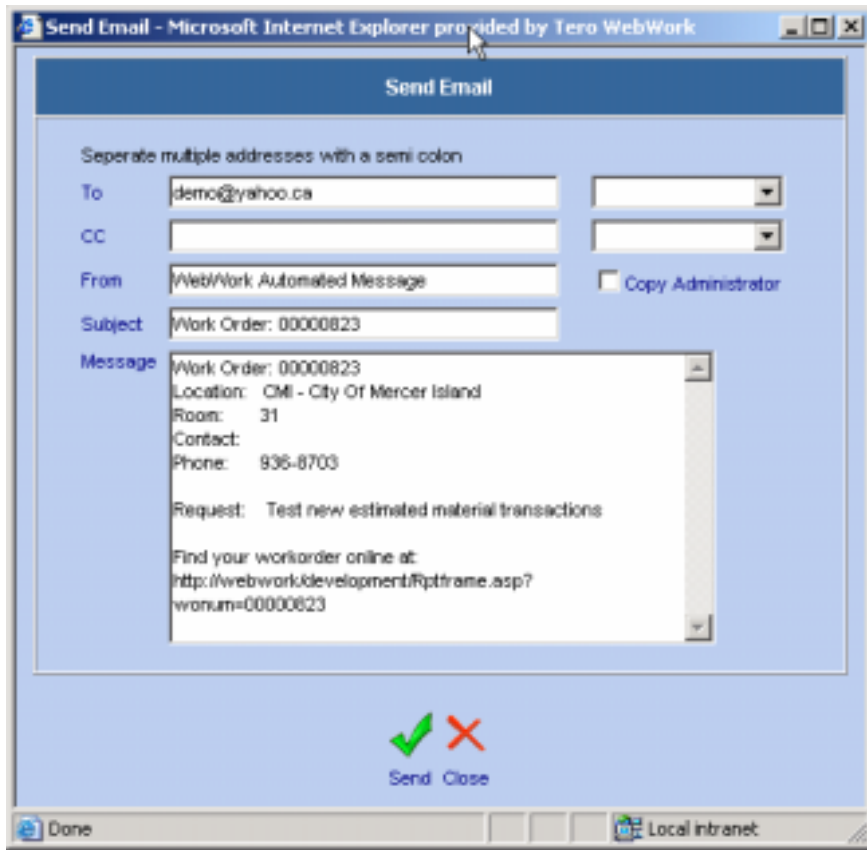
3.10 Emailing Work Order Reminders

In Web Work, a work order reminder can easily be emailed to the requester, employee, Manager or another recipient, using Web Work's built in email functionality.

To Email a Work Order:

- Click on the  module button to access the Work Orders module.
- Perform a Work Orders query to locate and retrieve the work orders you want to E-mail.
- Click on the  menu and select . The Send E-mail screen comes up:





This work order can also be sent to a cellular phone – providing the cellular phone has email functionality. Simply enter the email address for the cell phone into the To: field of the Email screen.

- Enter information into the applicable fields:

To Field: You can choose to email the work order to a Requester, an Employee, a Manager or another person you define.



CC Field: You can choose to carbon copy the open work order to the Requester, Employee, Supervisor or another person you define. Note: If you select Requester, Employee or Supervisor, the email address contained in the labour record for the person named in these fields of the work order is the address where the work order will be sent.

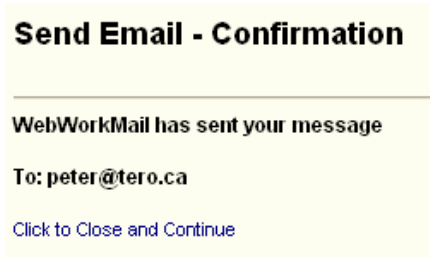
From Field: The email address of the person logged into the system will be displayed in this field.

Copy Administrator: You may e-mail the Web Work Administrator by checking off the [Copy Administrator](#) checkbox (see Admin. section for company e-mail field under System Defaults Setup).

Re: or Subject field by default will contain the Work Order identification number. You can add to this information or change this information as required.

Message Field: The message field contains the work order id, location, equipment and request. You can add to this information as required.

- You may modify the body of the text message before sending the reminder.
- Click on the  button to send the reminder. Click on the  button to return to the main Work Orders screen without sending the e-mail.
- By clicking the [Send](#) button, the e-mail will be sent to all parties specified. A Confirmation screen comes up. Click on [Click to Close and Continue](#) to close the screen off.





If you have multiple work orders open, only the one displayed on the screen will be emailed. To send additional work orders by email, open the details page of the applicable work order and then follow the steps above.

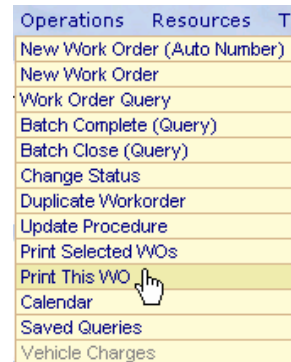
The default email server is setup in the Admin. Module. See Admin Module – System Defaults for more information on this function.

3.11 Printing Work Orders

There are two ways to print work orders. You can print an individual work order or multiple work orders that you have selected and retrieved.

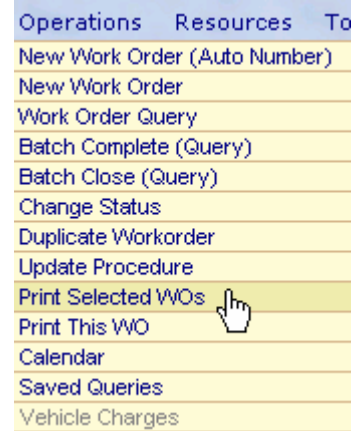
3.11.1 To print only the Work Order that is currently displayed on the screen:

- Click on the  module button to access the Work Orders module.
- Perform a Work Orders query to locate and retrieve the work order you want to Print.
- Click on the  button at the bottom right hand side of the screen or click on the [Operations](#) menu and choose [Print This WO](#) from the drop down menu.
- The selected record will open in a new browser window, previewing the Web Work - Work Orders report.
- Click on File and select Print from the browser drop down menu or click the print icon at the top of the screen (on the browser's Standard Toolbar) to proceed with printing.



3.11.2 To print batch of Work Orders that are selected in your query result.

- Click on the **Work Order** module button to access the Work Orders module.
- Perform a work order query to locate and retrieve work orders you want to print.
- Click on the **Operations** menu and choose **Print Selected WOs** from the drop down menu.
- The selected records will open in a new browser window, previewing Web Work - Work Orders report.
- Click on File and select Print from the browser drop down menu or click the print icon at the top of the screen (on the browser's Standard Toolbar) to proceed with printing.



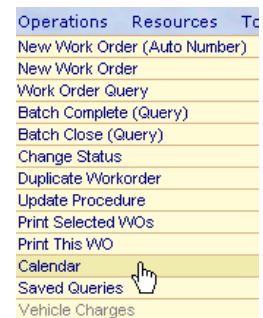
3.12 Work Order Calendars





The Work Order module includes a calendar, which displays work orders by target date. The contents of the calendar can be filtered by: Location, Equipment, Craft, Crew, Manager or Employee. The calendar is a useful scheduling tool.

To view the calendar:

- Click on the **Work Order** module button to access the Work Orders module
- Click on the **Operations** menu and select **Calendar** from the drop down menu.

The Calendar screen will open (see sample graphic below):



- To print the calendar click on the PRINT button  at the bottom right of the screen. This will print the calendar displayed on the screen.
- To filter the work orders on the calendar, click on the down arrow  beside the PM's and select Location, Equipment, Employee, Craft, Crew or Manager. Enter the code for the applicable selection into the next field, or click on the  button and select the applicable code from the Web Work database. Click on the  button to display a calendar matching the criteria you selected.
- Click on the arrows on either side of **<< Month >>** to move from one month to the next.
- To view details about a specific calendar entry, click on the **three dots** after the applicable entry on the calendar.

A screen similar to the one shown below will open:

Daily Calendar				
2004-Sep-22				
Click on the Workorder for full details or to print				
Work Order	Description	Location	Equipment	Priority
000351	fan not working	SHOP	ICE-001	MEDIUM
Select All				
Back to Monthly Calendar				

- To open any of the Work Orders displayed, click on the applicable **Work Order #**. To open all Work Orders displayed for this date click on **Select All**.
- To return to the monthly calendar click on **Back to Monthly Calendar**.



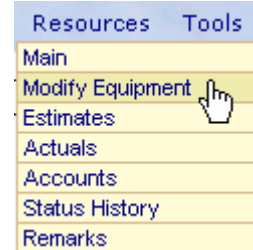
The calendar is Read Only.

3.13 Modifying Equipment

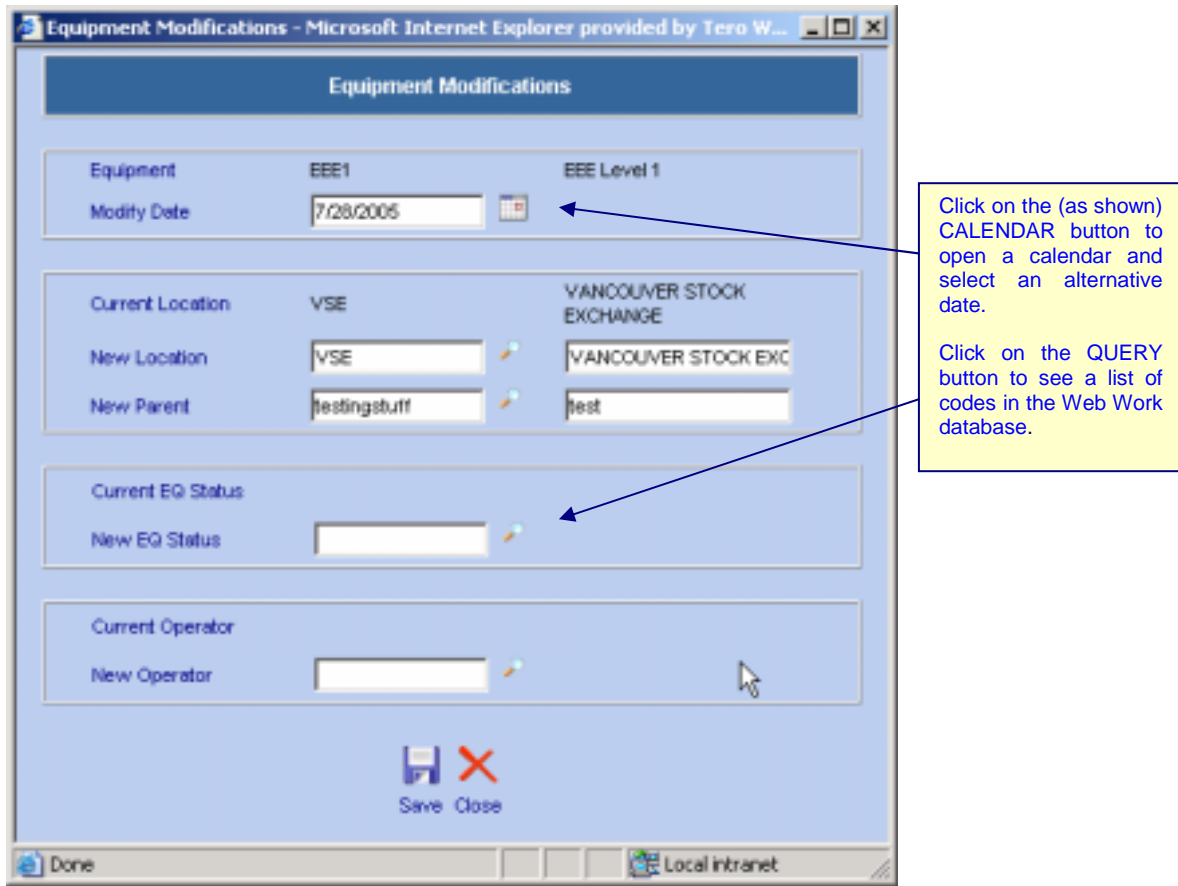
The [Modify Equipment](#) feature can be used to change the location of a piece of equipment, change the equipment parent, change the equipment operator or change the status of a piece of equipment. The same functionality is also found within the Equipment module. Usually the [Modify Equipment](#) feature is used when the work order specifically asks to change something about that equipment, including its current location, parent, status or operator.






To modify the equipment:

- Click on the button [Work Order](#) on the left hand side of the screen to access the Work Orders module.
- Perform a query to locate and open the applicable work order you wish to modify equipment upon.
- Click on the [Resources](#) menu and select [Modify Equipment](#) from the drop down menu.



The following screen will open:



- Enter a new **Modify Date** if applicable or click on the  button and select the date from the calendar.
- Enter the new Location into the **New Location** field or click on the  button to select the location from the Web Work database. The location description will fill in automatically.
- Enter a new EQ Status, if applicable, into the **New EQ Status** field or click on the  button to select one from the Web Work database.
- Enter a new Operator into the New Operator field or click on the  button to select the operator from the Web Work database.
- Click on the  button. The Equipment record will be updated with the new information.



If the equipment has any child equipment associated with it, a message box like the one shown below will be displayed. Click on the **OK** button to update the child equipment, click on the **CANCEL** button if only the current equipment's location is to be changed.

