

Procedures Module

Procedures are templates listing the tasks, labour, materials, and tools for a specific job. This Chapter describes how to use the Web Work, Procedures module.

Table of Contents

- 4.1 OVERVIEW OF THE PROCEDURE MODULE..... 3**
- 4.2 USING PROCEDURES 4**
 - 4.2.1 ADDING NEW PROCEDURES 5
 - 4.2.2 EDITING PROCEDURES..... 5
 - 4.2.3 DUPLICATING PROCEDURES 6
 - 4.2.4 DELETING PROCEDURES..... 6
- 4.3 IMPORTANT PROCEDURE FIELDS..... 7**
- 4.4 PROCEDURE ESTIMATES..... 7**
 - 4.4.1 ADDING ESTIMATES - TASKS..... 8
 - 4.4.2 ADDING ESTIMATES - LABOUR..... 9
 - 4.4.3 ADDING ESTIMATES - MATERIALS 11
 - 4.4.4 ADDING ESTIMATES - TOOLS 13
 - 4.4.5 EDITING PROCEDURE ESTIMATES..... 14
- 4.5 TASK LIBRARY 15**
 - 4.5.1 ADDING TO THE TASK LIBRARY 16
 - 4.5.2 APPLYING TASKS FROM TASK LIBRARY TO ESTIMATES 16
 - 4.5.3 EDITING THE TASK LIBRARY 17
 - 4.5.4 DELETING FROM THE TASK LIBRARY 17
- 4.6 PROCEDURE ACCOUNTS 18**
 - 4.6.1 APPLYING PROCEDURE COSTS TO MORE THAN ONE ACCOUNT..... 18
 - 4.6.2 MODIFYING PROCEDURE COSTS TO ACCOUNTS 19
 - 4.6.3 DELETING PROCEDURE COSTS TO ACCOUNTS..... 19
- 4.7 PERFORMING PROCEDURE QUERIES 20**
- 4.8 PRINTING PROCEDURES..... 20**
 - 4.8.1 PRINTING INDIVIDUAL PROCEDURE RECORDS..... 20
 - 4.8.2 PRINTING MULTIPLE PROCEDURE RECORDS 21
- 4.9 PROCEDURES - REPORTS 21**

4.9.1	RUNNING STANDARD REPORTS WITHOUT QUERY FILTER	22
4.9.2	RUNNING STANDARD REPORTS WITH FILTERS.....	22
4.10	LINKS.....	22

4.1 Overview of the Procedure Module

The Procedures module, is located in the Maintenance group of modules, and is used to setup templates for work, which can be used on work orders and preventive maintenance work orders. Once set up, procedures can be used on work orders to eliminate duplication of data entry.

Click on PROCEDURES in the Side Bar Menu module listing to access the Procedures module.

When you enter the Procedures module, you will be in Query mode as shown in the screen below:

Operations Resources Tools Help *Procedure Module*

The Module Option Menu drop down menus contain the various features available in the Procedures 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.

4.2 Using Procedures

You can set up procedures for all recurring maintenance tasks so that you can save valuable data entry time and no longer have to retype the same procedure each time you use it on a work order. A procedure also ensures that employees/contractors use the same methodology when performing a maintenance task: repairs are done in the same order, using the same materials. Procedures are also valuable to determine the amount of time required when scheduling a work order.

There are two ways to setup your procedures in Web Work:

Nested

Comprehensive

This will become very important when you go to setup your PM's and generate PM work orders. Either way will work with Web Work. It only matters that you know which one you are using when you apply the procedures to your PM Module.

Nested procedures are procedures that only include tasks, labour and material resources specific to that interval. For example, a nested PM consists of a monthly procedure and a quarterly procedure. The monthly procedure includes the tasks that are performed every month. The quarterly procedure does not include tasks that are performed monthly but only includes the tasks that are performed quarterly although the monthly tasks are also performed every three months. When a quarterly PM work order is generated, tasks from both procedures will be added to the work order.

Here is an example of Nested Procedures (for tasks only)

Monthly Procedure:

- Step 1
- Step 2
- Step 3

Quarterly Procedure:

- Step 4
- Step 5
- Step 6

Comprehensive procedures are procedures that include all the tasks that will be performed in each procedure. For example, the quarterly procedure includes the monthly tasks as well as the quarterly tasks. When a quarterly PM work order is generated, only tasks from the quarterly procedure will be added to the work order.

Here is an example of Comprehensive Procedures (for tasks only)

Monthly Procedure:

- Step 1
- Step 2
- Step 3

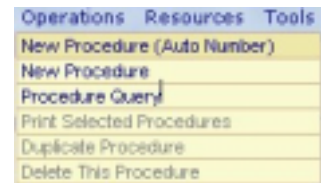
Quarterly Procedure:

- Step 1
- Step 2
- Step 3
- Step 4
- Step 5
- Step 6


4.2.1 Adding New Procedures

To create a new procedure (from the main Procedure screen):


- Click on OPERATIONS from the Module Option Menu at the top of the Procedures Screen, and select New Procedure or New Procedure (Auto Number) for the drop down menu.



OR


- Click on the  new icon at the bottom right of the Procedure screen. (depending on the mode you are in this icon may not be available)

You will now be in the Procedure screen, in new mode. If you selected AUTONUMBER, or if Autonumber is configured as the default in your system settings, the next Procedure number will be filled in the Procedure field.

- Enter information into SOME or ALL of the fields as displayed on the screen. Note: Procedure ID and Description are the only required fields.
- Click on the  save icon at the bottom right hand side of the screen to save the new Procedure record.

4.2.2 Editing Procedures

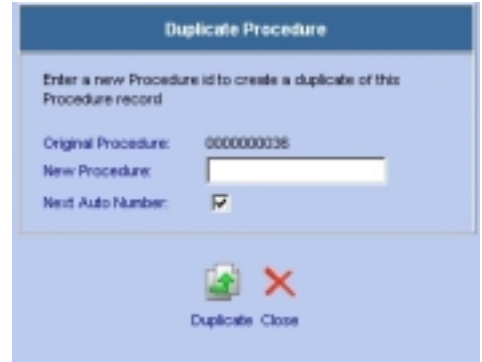
To edit / modify an existing procedure (from the main procedure screen):


- Query and Retrieve an existing procedure using a query (see Queries chapter for more details)
- Change the data in the fields as required.
- Click on the  save icon at the bottom right hand side of the screen to save the record.

4.2.3 Duplicating Procedures

To duplicate an existing procedure:

- Retrieve an existing procedure using a query (see Queries chapter for more details), on the screen in EDIT mode
- Click on OPERATIONS in the Module Options Menu and select Duplicate Procedure from the drop down.
- Enter the new procedure ID, or check the “Next Autonumber” field to assign procedure number automatically.



- Click on the  duplicate icon to duplicate this record and create the new one.

4.2.4 Deleting Procedures

You can delete a procedure from the database, if you make an error when creating the record. This functionality is NOT intended for use once a procedure has been used on work orders or PM records, as deleting the procedure at this point can ‘orphan’ those work orders or PM’s.

To delete a procedure:

- Retrieve an existing procedure using a query (see Queries chapter for more details), on the screen in EDIT mode
- Click on OPERATIONS in the Module Options Menu and select Delete This Procedure from the drop down.
- A popup window will ask you to confirm that you wish to delete this procedure and associated resources



- Click OK to confirm and delete the procedure from the database.

4.3 Important Procedure Fields

Procedures, as mentioned, are used to TEMPLATE work orders – so that you can outline a work procedure with multiple steps, materials, labour estimates, etc, and apply that to a work order by making only a single entry. You will notice that the Procedure screen is very similar to the work order screen, with some fields missing.

Before creating your procedures, it is important that careful consideration be given to how the procedures will be used in the system. For example, will the procedure be applied against many different locations / equipment, or will it be specific to one location or equipment ? This decision will affect which fields you complete on the procedure screen.

If, for example, you had a fleet of vehicles – eg: 20 Crown Victoria 4 Door Cruisers in a police department – those vehicles will have some very common procedures that are done on each of them. Oil Changes, Tune Ups, Tire rotations, brake inspections, etc. In this case you would want to create those procedures WITHOUT any equipment id on the procedure, and use the same procedure on all 20 similar vehicles through the PM Scheduling.

The example below shows how a generic procedure can be applied to multiple specific PM schedules – one for each vehicle in the fleet:

Procedure: 1234 – Oil Change , describes the task of doing an oil change .

PM: 0001 – 5000 KM Oil Change , Procedure: 1234, Equipment: 0001, Frequency: 5000 KM

PM: 0002 – 5000 KM Oil Change , Procedure: 1234, Equipment: 0002, Frequency: 5000 KM

.... Etc ...

PM: 0020 – 5000 KM Oil Change , Procedure: 1234, Equipment: 0020, Frequency: 5000 KM

Determining which fields are important to the Procedure, means determining how much of the work is specific or general enough to be included on your procedure – this will vary from task to task.

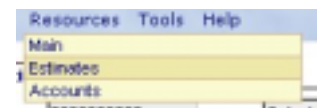
4.4 Procedure Estimates

Procedure estimates can be added to a procedure when it is created or at a later date. Procedure estimates will help employees/contractors determine what is needed. You can add estimates to a procedure when creating a procedure or at a later date.

- To add or modify estimates, retrieve a procedure , and in edit mode, click on the **Estimates** tab

OR

- Select Estimates from the RESOURCES drop down in the Module Options Menu.



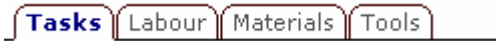
Task Number	Description	Additional Notes
10	Remove back cover	
20	Check compressor	
30	Drain all water in freezer compartment	guideline 1B
40	DO SOME WORK TEST TEST	TEST! TEST!
50	Install back cover on equipment's body	

4.4.1 Adding Estimates - Tasks


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

To add task estimates to a procedure (from the Procedure estimates screen):

- On Estimates screen there are three tabs: Tasks, Labour , Material and Tools




- Click on the Tasks tab to show the Task estimates Note: when you enter the Estimates screen, you will be in Task mode.

- Click on the  new icon to open the Add Tasks screen as pictured here.


- The Procedure ID is entered automatically by the Web Work system and cannot be edited.

- Enter a task number. i.e.: 1, 2, 3 or A, B, C, etc. This is the order your Tasks will appear in on the list.

- Enter an Account if applicable or click on the  button to select an account from the Web Work database. (Leave the account field blank if this procedure is going to be split between multiple accounts. See Procedures – Accounts for more information.)

- Enter a Description of the task. i.e.: Turn off the power.

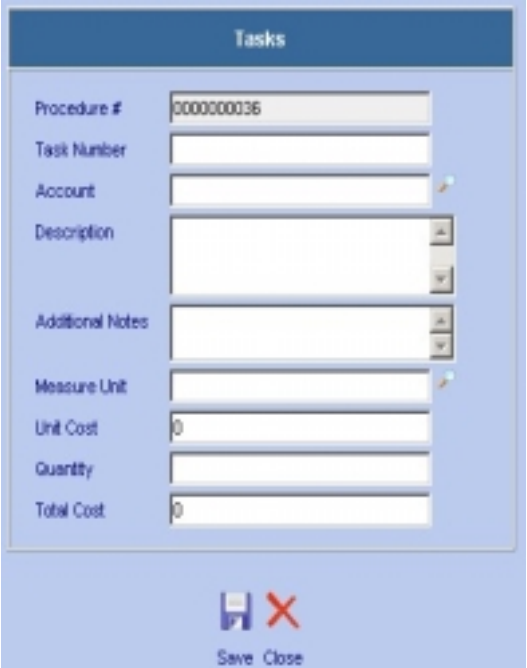
- Enter Additional Notes. i.e.: Make sure no one is using the machine before you shut down the power.


- 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.



- Click on the  save icon at the bottom right hand side of the screen to save the task. You will be returned to the Estimates screen in Task mode where you can continue to add Tasks, Labour, Materials, Tools or return to the main screen of the procedure.




To return to the main screen of a procedure after saving an Estimate, click on the MAIN tab at the top of the procedure screen.

4.4.2 Adding Estimates - Labour

Add labour to a procedure to indicate what type of employee or contractor is required to perform the work. You can specify a specific labour resources or a craft/trade requirement.



To add labour estimates to a procedure (from the Procedure estimates screen):

Transaction Date	Employee	Description	Account	Rate	Additional Cost	Hours	Total Cost
11/7/2000	3555	OT		£32.00	£0.00	1	£32.00
11/7/2000	DF	Night shift		£17.00	£0.00	2	£34.00



- Click on the Labour tab to view the labour estimates.
- Click on the  new icon to open the Add Labour Estimates screen as pictured below:

Labour Resource

Procedure #	<input type="text" value="000000036"/>	Task Number	<input type="text"/>
Transaction Date	<input type="text" value="7/6/2005"/>	Employee	<input type="text"/>
Craft	<input type="text"/>	Labour Type	<input type="text" value="REG"/>
Pay Scale	<input type="text" value="1"/>	Hours	<input type="text"/>
Rate	<input type="text"/>	Additional Cost	<input type="text"/>
GST	<input type="text"/>	PST	<input type="text"/>
Total Cost	<input type="text"/>	Account	<input type="text" value="ELEC"/>
Description	<input type="text"/>		
ChargeBack Amount	<input type="text" value="0"/>		

Save Close

- The Procedure ID field cannot be edited and is automatically filled.
- The Task Number is a drop-down listing of all procedure tasks, if any are associated to this procedure. Each labour resource can be attached to a specific task for work tracking. You only have to select the appropriate task number from the drop-down listing; there will be no choices if there are no tasks assigned to this procedure.
- The Trans Date field is filled in automatically. To edit this field, delete the current date and add the date of your choice.
- Enter an employee or click on the  lookup icon to select an employee from the Web Work database. If a rate for the employee you choose has been entered in the Labour module the rate field will be updated with this amount. Use this field to assign work to Vendors too.
- When you click on the  lookup icon beside the Employee field, a screen such as the one shown below will open:
- You can filter the information by: the Code or Name of your choice, or by: Employee, Requester, All or Vendor.


Employee/Requester Selection

Code

Name

Employee Requester All Vendor




Code	Name
1a	DEMO USER
2555	BOB ADAMS
2b	22 ssss
3555	TED WILLIAMS
ABC DE	DE ABC
C D	Christian Dior
CANUCK	canuck canuck
CHEN	Jacky Chen
DAGLUS	TOMMY D'AGLUS
DF	DAN FORD
DUDE	dude the
DVT	David Taylor
FS	FRED SMITH
GS	GEORGE SMITH
HHH	name the

 Close Window

After selecting the criteria you wish to use to query the records, click on the FILTER button.

Click on the radio button beside: Employee, Requester, All or Vendor.

Highlight and click on the row to use this person and return to the labour estimate screen.

- Enter a craft or click on the  lookup icon to select a craft from the Web Work database.
- Enter a Labour Type or click on the  lookup icon to select a labour type from the Web Work database.
- The Scale automatically defaults to 1. To change this, delete the current scale and add the scale of your choice.
- Enter the estimated number of hours into the Hours field. When you enter the number of hours, the taxes and total will be calculated by the Web Work system.
- The Rate field will be filled in with the rate setup for the employee in the Labour module. To change this rate, delete the rate shown and enter the rate of your choice.
- Enter any additional cost. If an additional cost is added, the taxes and total will be updated accordingly.
- Enter Tax 1 and 2 if applicable. If taxes are entered the total will automatically be recalculated.
- Enter an account, if applicable.
- The Details field displays the complete name of the Employee you choose or the craft description if no employee is chosen.
- Chargeback amount is a dollar figure used to track billable costs separate from the total cost of each labour resource.
- Click on the  save icon at the bottom right hand side of the screen to save the labour estimate.


4.4.3 Adding Estimates - Materials

Add materials to a procedure to indicate the materials required to complete the job. (Note again that these are estimates and all of the estimated materials may not be used, or additional materials may be used). Adding Estimated Materials from a storeroom and approving the work order can reserve your items.

To add materials to a procedure (from the Procedure Estimates screen):



Issue Date	Item Number	Description	Account	Quantity	Issue Price	Extension
11/7/2000	C-SB-4J592	5 INCH BY 6 INCH GREY ENAMEL SHELF BRACKET		3	€27.00	€81.00

- Click on the Material tab to view material estimates.

- Click on the  new icon to open the Add Material screen as pictured here.
- The Procedure ID and Trans. Date fields are filled in automatically. Only the Trans. Date can be edited by deleting the current date with the date of your choice.
- The Task Number is a drop-down listing of all procedure tasks, if any are associated to this procedure. Each material resource can be attached to a specific task for work tracking. You only have to select the appropriate task number from the drop-down listing; there will be no choices if there are no tasks assigned to this procedure.



The screenshot shows the 'Material Resource' form. It contains several input fields: Procedure # (000000040), Issue Date (8/19/2005), Item Number, Issue Price, Quantity, Tax1, Account (ELEC), Description, Charge Back (checked), Markup Amount, ChargeBack Tax2, Task Number (dropdown), Storeroom (CENTRAL), Serial Number, Issue Unit, Additional Cost, Tax2, Edensson, ChargeBack Tax1, and ChargeBack Amount. At the bottom, there are 'Save' and 'Close' buttons.

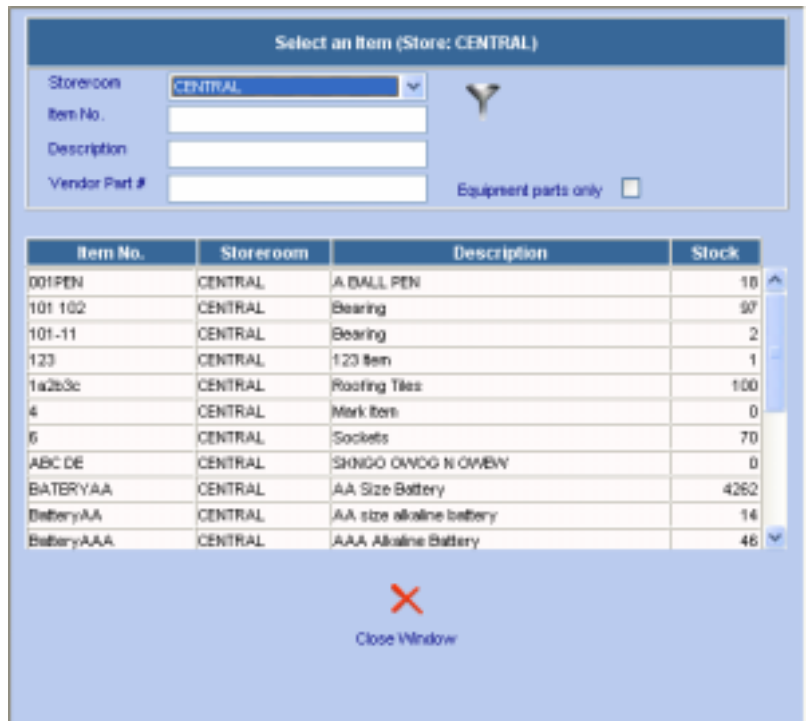
- If you are entering a Stock Inventory Item then enter a storeroom or click on the  lookup icon to select a storeroom from the Web Work database. FOR NON INVENTORY ITEMS, LEAVE THE STOREROOM FIELD BLANK (or erase the default if it is already populated!)
- Enter an Item Number or on the  lookup icon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



- 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.)



The screenshot shows the 'Select an Item (Store: CENTRAL)' form. It includes a Storeroom dropdown (CENTRAL), Item No., Description, Vendor Part #, and an 'Equipment parts only' checkbox. Below the form is a table of items with columns for Item No., Storeroom, Description, and Stock.

Item No.	Storeroom	Description	Stock
001PEN	CENTRAL	A BALL PEN	18
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 OAVGO N OMBW	0
BATERYAA	CENTRAL	AA Size Battery	4262
BatteryAA	CENTRAL	AA size alkaline battery	14
BatteryAAA	CENTRAL	AAA Alkaline Battery	46

At the bottom of the form is a 'Close Window' button.

- 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.


4.4.4 Adding Estimates - Tools

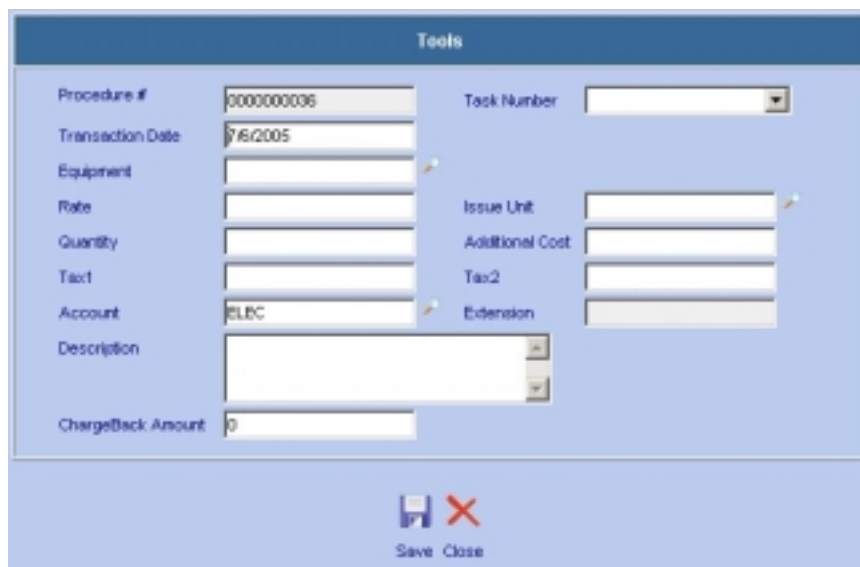
Add tools to a procedure to indicate the rentals required to do a job.




To add tools to a procedure estimate (from the Procedure Estimates screen):



Transaction Date	Equipment	Description	Account	Extension
			Total	£0.00

- Click on the Tools tab to view tools estimates.
- Click on the  new icon to open the Add Tool Estimate screen as pictured below:



- The Procedure ID field cannot be edited and is automatically filled.
- The Task Number is a drop-down listing of all procedure tasks, if any are associated to this procedure. Each material resource can be attached to a specific task for work tracking. You only have to select the appropriate task number from the drop-down listing; there will be no choices if there are no tasks assigned to this procedure.
- The Trans. Date field is filled in automatically. To edit this field, delete the current date and add the date of your choice.
- Enter an equipment record id or click on the  lookup icon to select an equipment record from the Web Work database. Rate will populate from the Equipment record's Rate field (in the Equipment Module.) You can always override and edit the result.
- 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 equipment record selected and can be modified.
- Enter the amount of the chargeback for this tool use in the Chargeback Amount field.
- Click on the  save icon at the bottom right hand side of the screen to save the tool estimate.


4.4.5 Editing Procedure Estimates

To edit estimates (from the Procedure Estimates screen):

- Select the appropriate tab – Tasks, Labour, Material or Tools by clicking on the tab.
- Highlight and click on the estimate line that you wish to edit.
-

Tasks Labour **Materials** Tools

Issue Date	Item Number	Description	Account	Quantity	Issue Price	Extension
11/7/2000	C-SB-4J592	5 INCH BY 5 INCH GREY ENAMEL SHELF BRACKET		3	€27.00	€81.00
11/7/2000	C-SB-4J592	5 INCH BY 5 INCH GREY ENAMEL SHELF BRACKET		5	€8.40	€42.00
11/7/2000	C-SB-4J592	5 INCH BY 5 INCH GREY ENAMEL SHELF BRACKET		5	€8.40	€42.00
11/7/2000	E-B-F017T8	3 LAMP BALLAST		5	€4.20	€21.00
11/7/2000	E-B-F017T8	3 LAMP BALLAST		4	€4.20	€16.80

- The edit Estimates (task/labour/material/tool) window will popup (same screen as adding estimates).
- Enter the new information into the applicable fields.
- Click on the  save icon at the bottom right hand side of the screen to save the edited estimate.

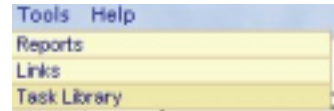


If the procedure is attached to a PM, then any change in the procedure will affect the PM details as well. If the Procedures main screen details are changed, the PM main screen will change. If the estimates of a procedure are changed, the PM Estimates will also change. Remember that the main screen and estimate changes have a completely separate effect on the PM. i.e.: Change the main screen will not affect the estimates and vice versa.

4.5 Task Library

Much as a procedure is a template for a work order, you can create a template for a Task item by saving it in the Task Library. The Task Library allows you to create task lines that can be used repeatedly in different procedures, PM's or Work Orders without having to retype the information each time. This saves time and ensures integrity of the data by having the exact same entry on every use.

To maintain (add or modify) the Task Library, click on TOOLS on the Module Option Menu at the top of the Procedures screen, and select Task Library from the drop down list.



The Task Library list will be displayed, showing all existing entries in the library.




Operations Resources Tools Help		<i>Procedure Module</i>
Task Number	Description	
0010	Replace valve, and check for proper seating and operation	
0020	Replace fan belt and check tension on all pulleys	
0030	Grease Bearings, check for proper operation	
0040	Replace Air filter, check old filter for abnormal conditions	
0050	Check oil levels and add as necessary	

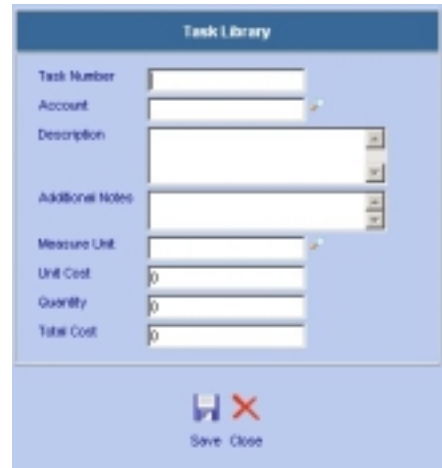
TaskLibrary



4.5.1 Adding to the Task Library

To Add to the task library, from the Task Library Listing screen:


- Click on  new icon at the bottom right of the screen.
- Task Library task edit screen will open for adding a new task item.
- Enter Task Number – you cannot duplicate task numbers in this list, this must be unique to the library.
- Enter Account – if applicable.
- Enter Task Description, and Additional Notes.
- Enter Measure Unit (eg: HRS, EA, FT, etc) or click on the  lookup icon to select.
- Enter the Unit cost and quantity needed – total cost will be calculated.
- Click  save icon to save this task to the library.





4.5.2 Applying tasks from Task Library to estimates

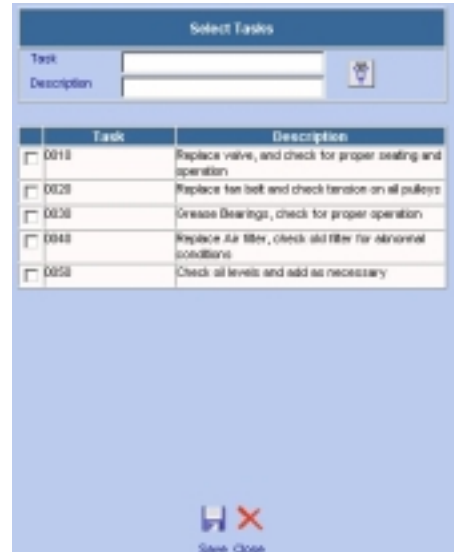
When editing the task estimates (as described above), you can add a new task line 'manually' or you can select from the Task library, to save repetitive input.

To apply items from the task library, from the Procedure Estimates / Task tab:

- Click on the  task library icon at the bottom right of the screen.



- The SELECT TASKS popup will appear – enter filter criteria, or leave blank, and click on the  filter icon to show the (matching) task listing from the library.
- Check the checkbox beside one or more of the tasks that you wish to apply to this procedure.
- Click on the  save icon to add these tasks to the procedure task estimates.




Note that the task numbers will be applied to your procedure and you may need to renumber your tasks accordingly for proper sequential ordering of the tasks.

4.5.3 Editing the Task Library

To edit the task library, follow the procedures as above to open the task library listing, highlight and click on a task item to edit.

Task Number	Description
0010	Replace valve, and check for proper seating and operation
0020	Replace fan belt and check tension on all pulleys
0030	Grease Bearings, check for proper operation
0040	Replace Air filter, check old filter for abnormal conditions
0050	Check oil levels and add as necessary

- The task item will open in the edit window.
- Make desired changes and click the  save icon to save to the library.

4.5.4 Deleting from the Task Library

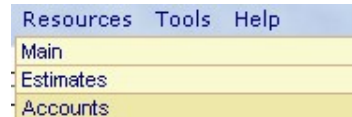
Open the task item from the library, as above for Editing, and click on the  delete icon to remove the task from the library.

4.6 Procedure Accounts

A procedure 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 procedure, simply enter the applicable account in the Account # field on the main procedure screen.

When assigning procedures to multiple accounts, you can set the total cost not to exceed either the percentage rate or the cost total amount you choose.

- Retrieve a procedure using a query, on the screen in edit mode.
- Click on **Resources** on the Module Option Menu at the top of the screen, and select Accounts from the dropdown

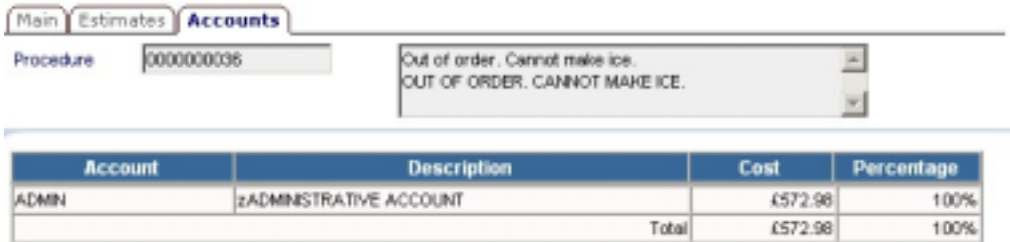


OR




- Click on the **Accounts** tab at the top of the procedure screen



The accounts screen will be displayed, listing all currently allocated accounts, as below:



4.6.1 Applying Procedure Costs to more than one Account

To apply procedure costs to more than one account:


- View the procedure accounts screen as described above.
- Click on the  new icon in the lower right of the screen to add a new account assignment.
- The Procedure Accounts screen will popup as shown below.

- Enter the Account code, or click on the  lookup icon to select.
- Enter the Percentage of the total from this procedure to be applied to this account code.
- Click on the  save icon to save to the Procedure Accounts.
- Continue adding Accounts until you have accounted for 100% based on your percentages input.



The screenshot shows the 'Procedure Accounts' form. It has a blue header with the title 'Procedure Accounts'. Below the header, there are four input fields: 'Procedure' (with value 000000036), 'Account' (empty), 'Percentage' (empty), and 'Cost Amount' (empty). To the right of the 'Percentage' field is a '%' symbol. Below the fields is a checkbox labeled 'Keep Percentage'. At the bottom of the form are two buttons: a blue 'Save' button with a floppy disk icon and a red 'Close' button with an 'X' icon.


4.6.2 Modifying Procedure Costs to Accounts

- To modify the percentage of costs allocated to accounts, highlight and click on the line in the Procedure Accounts screen (tab) to edit the line.
- Make desired changes to the information
- Click on  save icon to update the procedure accounts.



The screenshot shows the 'Procedure Accounts' form with the following values: 'Procedure' (000000036), 'Account' (ADMIN), 'Percentage' (50), and 'Cost Amount' (288.40). The 'Keep Percentage' checkbox is checked. At the bottom, there are three buttons: a blue 'Save' button with a floppy disk icon, a red 'Delete' button with a document and 'X' icon, and a red 'Close' button with an 'X' icon.

4.6.3 Deleting Procedure Costs to Accounts

- To delete an account from the Procedure Costs accounts screen, click on the line to edit, as above, and click on the  delete icon to delete.

4.7 Performing Procedure Queries


You can use the query by example features of Web Work to find the Labour record(s) you are looking for quickly and easily.

For more information on Query by Example see the QUERIES chapter of this manual.

To perform a query in the Procedure module:

- Click on OPERATIONS in the Module Option Menu at the top of the screen, and select Procedure Query (in any mode)

OR


- Click on the  new query icon in the lower right corner of the screen (this icon may or may not be available based on the mode you are in)
- While in Query mode, the MODE indicator in the lower left of the screen will indicate “query”.

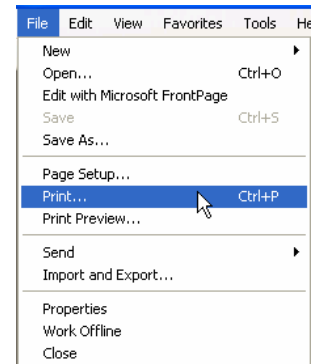
4.8 Printing Procedures

There are two ways to print Procedures. You can print an individual procedure or multiple procedures that you have selected and retrieved.

4.8.1 Printing Individual Procedure Records

To print only the procedure that is open on the screen:

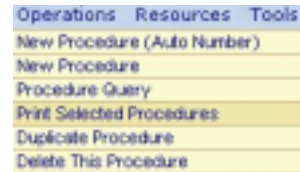
- Click on the  print icon at the bottom right hand side of the screen.
- The selected record will open in a new browser window.
- Follow the procedure for your operating system to print the document from here (eg: Windows – select, File, Print)



4.8.2 Printing Multiple Procedure Records

To print a batch of procedures:

- Perform a procedures query to open the desired procedures. See Procedure Queries for more information on performing procedure queries.
- Click on **Operations** from the Module Option Menu at the top of the Procedure screen, and choose Print Selected Procedure from the drop down menu.
- The selected records will open in a new browser window.
- Follow the procedure for your operating system to print the document from here (eg: Windows – select, File, Print)



4.9 Procedures - Reports

There are various Standard Procedure reports that come with Web Work. Further you may create your own, custom reports using the Report Writer (to create custom reports, refer to the Report Writer chapter.)

There are two methods of generating the Standard reports – **QUERY filtered** reports, or standard, **NON-filtered** reports. It is important to understand the difference between the two as it will have a substantial impact on the results of your reports.

QUERY filtered reports will apply the query you have run on the screen to the report that you are running. For example, if you have done a query on the screen to show all procedures for location “BLDG1” – you end up with your query result set (eg: 5 of 100 total procedures are for BLDG1). You retrieve your query results into the procedure module and it would show 1/5 or similar in the MODE indicator in the bottom left side of the screen. ANY standard report you now run will be filtered to only report on those 5 procedure records! If one of those reports had a conflicting criteria (say LOCATION=BLDG2) , then the obvious result would be a report with 0 records showing (as the query contains only LOCATION=BLDG1 there will be NO records of LOCATION=BLDG2)

NON-filtered reports will run using all information in the database (in our example , the entire 100 record database).

4.9.1 Running standard reports without QUERY filter

Ensure that you are in the procedure module, in QUERY mode, and that you are NOT working with any subset/query results of the procedure database.

- Click on **Tools** on the Module Option Menu and select Reports from the drop down menu. The Report Select Window will show up, listing available Labour reports.
- Click on any of the available reports. Any of the reports will consider ALL available records from the database.
- If you wish to print the Labour report to the printer, click on the File pull down menu and select print to proceed with printing.



4.9.2 Running standard reports with filters

- Run your query and retrieve the result set to the Labour module – you should now be in EDIT mode with the mode indicator showing edit (recno/queryrecords).
- Click on **Tools** on the Module Option Menu and select Reports from the drop down menu. The Report Select Window will show up, listing available Labour reports.
- Click on any of the available STANDARD reports. Any of the reports will consider only the results of your current query on the report. (NOTE: Queries NEVER apply to report writer reports)
- If you wish to print the Labour report to the printer, click on the File pull down menu and select print to proceed with printing.

4.10 Links

You can view existing links or create new links using the Links feature. For procedure records, you may wish to upload copies of schematics, specifications, link to a manufactures data sheet or maintenance recommendations,include a picture of a part, etc.

You may link documents, websites, drawings, pictures or any media the computer recognizes.

Web Work links are discussed in full detail in the LINKS chapter, please refer there for more information.