



Locations Module

The Locations module is where Operating Locations are created and maintained. A location is a space identifier of some kind; however every organization will have their own way of identifying and using locations. A location may be a building, room, field, zone, site or even a state or a city name. Locations can be created in a hierarchal manner. This Chapter describes how to use the Web Work, Locations module.

Table of Contents

7.1	OVERVIEW OF THE LOCATIONS MODULE	3
7.2	CREATING NEW LOCATION RECORDS	4
7.2.1	ADDING NEW LOCATION RECORDS	4
7.2.2	CREATING PARENT/CHILD LOCATIONS.....	4
7.2.3	LOCATION TYPE FIELDS	5
7.2.4	ENTERING CONTACT AND EXTRA CONTACT INFORMATION.....	6
7.3	DUPLICATING LOCATION RECORDS	6
7.4	DELETING LOCATIONS.....	7
7.5	LOCATION SPECIFICATIONS.....	8
7.5.1	VIEWING LOCATION SPECIFICATIONS	8
7.5.2	ADDING LOCATION SPECIFICATIONS	8
7.5.3	EDITING LOCATION SPECIFICATIONS	9
7.5.4	DELETING LOCATION SPECIFICATIONS	9
7.6	SPECIFICATION TEMPLATES (KITS)	10
7.6.1	EDIT A SPECIFICATION TEMPLATE	10
7.6.2	NEW SPECIFICATION TEMPLATE	11
7.6.3	DELETE A SPECIFICATION TEMPLATE	11
7.6.4	USING A SPECIFICATION TEMPLATE.....	11
7.6.5	SEARCHING LOCATIONS USING SPECIFICATIONS	12
7.7	VIEWING EQUIPMENT LISTS	12
7.8	PERFORMING LOCATION RECORD QUERIES	13
7.9	PRINTING LOCATION RECORDS	14
7.9.1	PRINTING INDIVIDUAL LOCATION RECORDS.....	14
7.9.2	PRINTING SELECTED LOCATION RECORDS.....	14
7.10	LOCATIONS - REPORTS	15
7.10.1	RUNNING STANDARD REPORTS WITHOUT QUERY FILTER.....	15

7.10.2 RUNNING STANDARD REPORTS WITH FILTERS 15

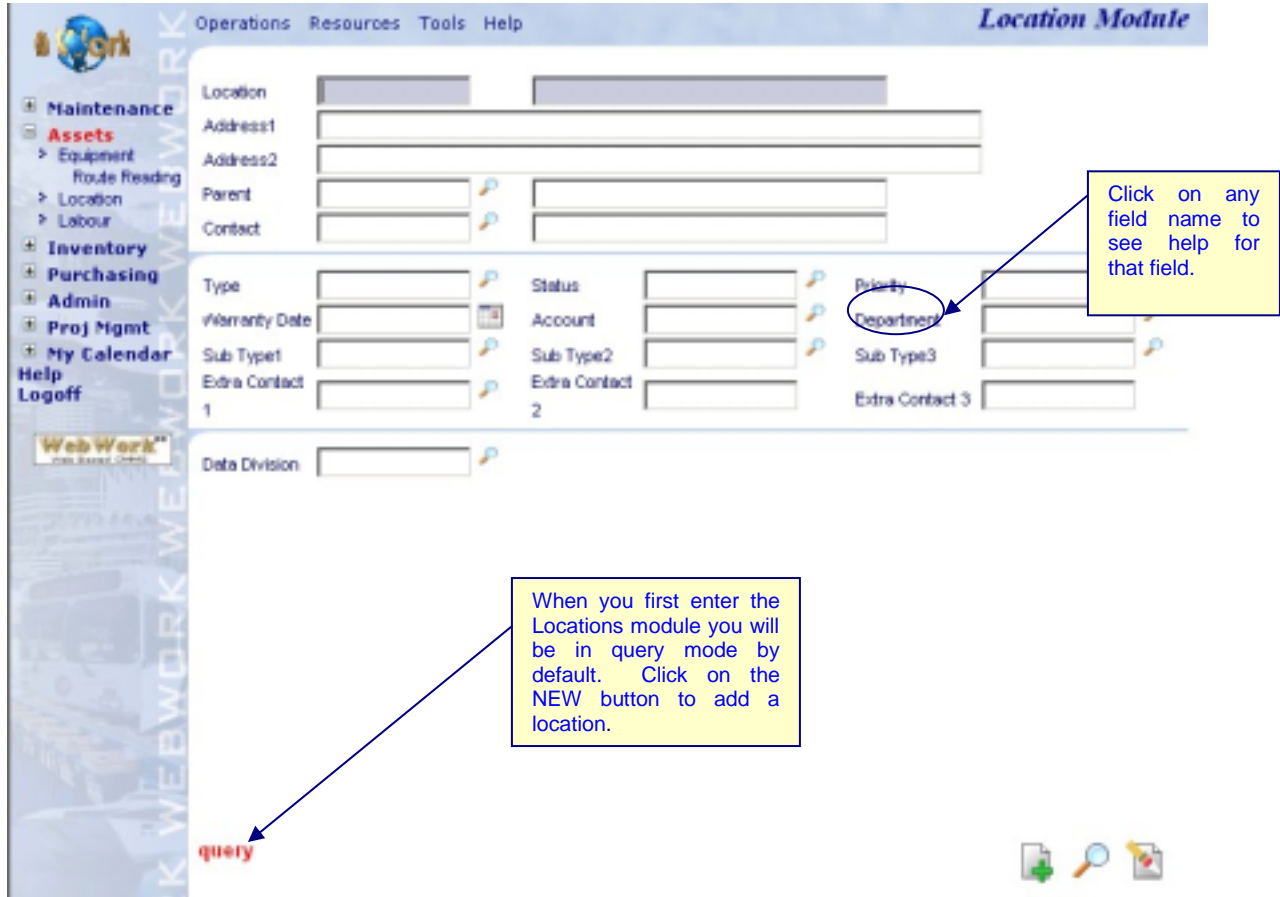
7.11 LINKS..... 16

7.1 Overview of the Locations Module

The Locations module is used to setup and query operating locations. Location records can be setup in a hierarchal fashion. You can create a main location and then any number of child locations within the main location.

Click on LOCATIONS from the Side Menu Bar Module List (In the ASSETS group) on the left hand side of the screen to access the Locations module.

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



The Module Options Menu, at the top of the screen **Operations Resources Tools Help** contains the drop down menus for features within the location module.



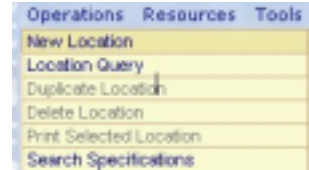
Web Work includes "help files" for all field names. To access these help files, click on the field name. A popup window will open displaying help for the field selected.

7.2 Creating New Location Records

Location records should be created for every operating location. Locations are used in work orders to advise the employee/contractor of the site where work is to be performed. On reports, locations are also used as a cost center.



7.2.1 Adding New Location Records



To add a New Location Record (from the main Location screen):



- Click on OPERATIONS on the Module option menu and select New Location from the drop down

OR

- Click on the  new icon at the lower right corner of the screen.
- Fill in SOME or ALL of the fields on the screen - Note: Required fields are shaded blue, all others are optional fields.
- Click on the  save icon at the bottom right hand side of the screen to save the Location Record.
- Once you save the new location, you will then be in edit mode: you can edit and resave the location record, print the location record or continue working in the module of your choice by clicking on the module button on the left hand side of the screen.

 The F12 key is a hot key and may be used to SAVE a record instead of clicking on the  save icon.

7.2.2 Creating Parent/Child Locations

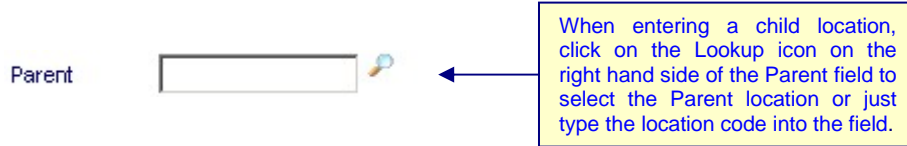
Any particular location may act as a parent or as a child location. The difference between a parent and a child location is in the relation to each other.

When entering locations, always enter parent locations first (the main locations) and then enter the child locations next (sub-locations within the main locations). This way you can attach the child location to the already existing parent location record.

Each Location record has a Parent field that can be used develop a hierarchy between Location records. When you enter a Location number in the Parent field of another Location record, the other Location becomes a Child of the specified Parent Location.

For example:

In a school district you may setup each school as a parent location. Then the school gym, electrical room, playground, office etc would all be setup as child locations, linked to the parent location (the school they are in).



Once a parent location is specified, the Parent Description, Contact and Contact Description and DR Account fields will automatically be filled in with the information that was entered on the Parent location record.

7.2.3 Location Type Fields

The Location Type fields are made up of a Type, Sub Type 1, Sub Type 2 and Sub Type 3. The Location Type fields can be used to group similar Locations into categories that can later be used to query and report by. An example of Location Types might be building, room, and playground.

Location Type fields can be used independently of each other or setup into a hierarchy.

Independent means that you use the fields just as any other field with validation. The fields work independent of one another.

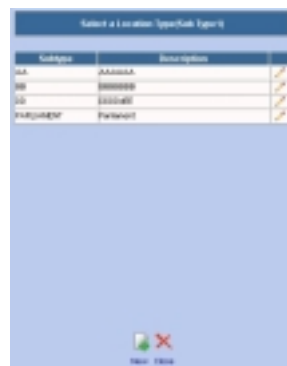
Hierarchy means that the Sub Type fields are working together. By selecting a record in the Sub Type 1 field, the Sub Type 2 field shows only children of the Sub Type 1 field. For example, the selection of the Sub Type 2 field is then limited to the parent selected in the Sub Type 1 field, and so on.




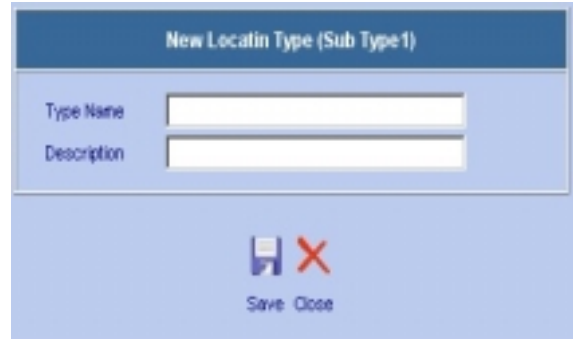
Turning the hierarchy for Location Types ON/OFF is done by an administrator within the Admin module under System Defaults Setup.



To add a new Type or Sub Type:


- Click the Lookup icon beside the Type field you want to add to.
- The Location Type Selection screen appears.



- Click  new icon to add the new Type code. The following screen should appear.
- Enter the new Type in the Code field.
- Enter the full description of the Type code into the Description field.
- If you have set your Equipment Sub Types to hierarchal in the Admin Module you will need to fill in the Parent field to define which Location Type code is the Parent to the new Location Sub Type you are entering. Note that the choices for Parents are limited to the Location Types on the next level up.



- Click on the  save icon to save the new Location Type.
- You can edit an existing Location Type at anytime by clicking on the  edit icon from the type selection list. Note the code cannot be edited once saved it is saved, you can only change the description.

 The Location Type and Sub Types may be setup by combining both the hierarchy and independent approaches. This way you have some Type records available at all times (more generic types) along with records that are limited by the parent Type (more specific types).

7.2.4 Entering Contact and Extra Contact information

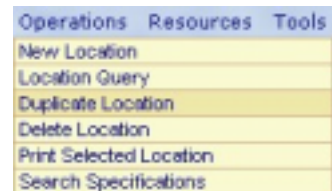
For the Contact and the Extra Contact 1 fields a lookup list is provided. The Extra contact 2 and 3 fields are free-text fields. However in any Contact field in Web Work, the fields are NOT restricted to the lookup lists provided – it's an exception! User may enter anything into the Contact fields regardless if it is a valid code or not.


7.3 **Duplicating Location Records**

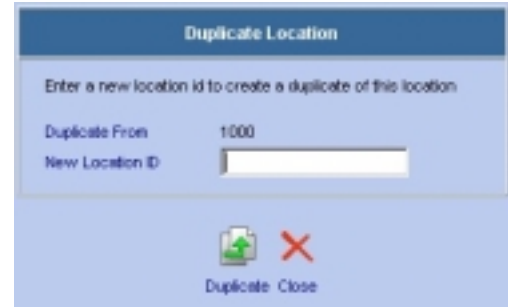
Instead of having to retype similar information for similar Locations, you can create a duplicate Location record and then edit the information for the new Location.

To Duplicate Location Record (from the main Location screen)

- Retrieve a valid Location record to be duplicated. You should be in EDIT mode.
- Click on OPERATIONS on the Module Options Menu to display the drop down menu.
- Select Duplicate location from the drop down menu.



- The Duplicate Locations Record screen comes up.
- Enter the New Location Code.
- Click on the  duplicate icon to duplicate the location with the new code you have entered.
- The duplicate location record will open in Edit mode, all information from the original location also gets duplicated including specifications.

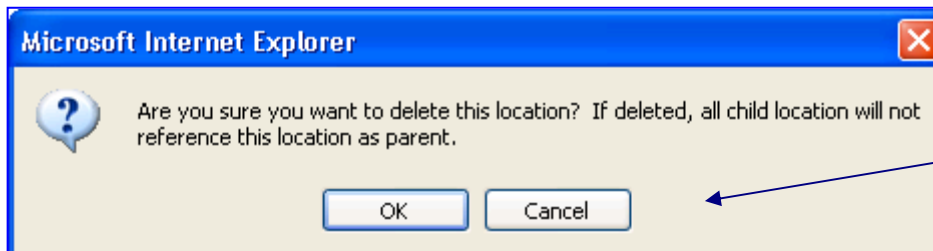


7.4 Deleting Locations

Caution should always be used when deleting any records from the Web Work database. However, there may be times when this is necessary. An example would be when a location record was entered in error or the location is no longer existent. Note that location codes or any other codes in Web Work are NOT editable!

To delete a Location (from the main Location screen):

- Retrieve an existing location record, in EDIT mode.
- Click on OPERATIONS in the Module Option Menu at the top of the page and select *Delete Location* from the drop down menu.
- A message box will appear asking if you are sure you want to delete the Location record.



By deleting a location, any child locations will no longer reference this location as their parent. Click on the OK button to confirm this action or the CANCEL button to return to the Location record.



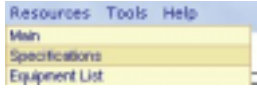
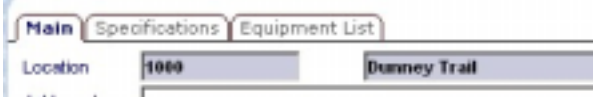
It is not advisable to delete any locations already assigned to any open Work Order, PM or Equipment Record.

7.5 Location Specifications

Additional details about a location can be added to a location using the Specifications feature. You can later do searches on location specifications to find locations with similar attributes. Specifications may include the dimensions, date of coming to service, colour or any other information to further describe the location.




7.5.1 Viewing Location Specifications


To add specifications to a location record (from the main Locations screen):

- Retrieve a location record. You will be in EDIT mode. (See Queries section of this manual for more information.)
- Put your mouse over RESOURCES on the Module Options Menu at the top of the screen and select Specifications from the drop down menu.
- OR
- Click on the specifications tab from the Main Locations screen.
- The existing specifications, if there are any, will be displayed in the Specifications List.

7.5.2 Adding Location Specifications

To ADD new location specifications, view the specification list for the location as described above.

- Click the  new icon at the bottom right of the specification screen to bring up the Location Specifications screen in ADD mode.
- Enter the new Attribute or select an existing attribute using the  lookup icon.
- Enter the new Specification Attribute Value.
- Enter the Specification Measurement Unit.
- Click on the  save icon to save the value to the Location specification list and close the add window.




7.5.3 Editing Location Specifications


To EDIT or modify an existing location specification value:

Attribute	Value	Measure Unit
Color	Yellow	
Weight	30	KG

- Highlight and click on the specification from the Location specification list.
- Make changes to the Attribute, Value or Measure Unit

- Click the  save icon to save the changes and update the location specification.


7.5.4 Deleting Location Specifications

To delete a location specification, recall the specification record as above for EDITING, and press the  delete icon to remove the record from the Edit Specification window.

7.6 Specification Templates (Kits)


You may find a situation when there is a whole list of similar locations that have the same or a very similar specifications to be entered. A template is a pre-defined list of specifications captured under one code – basically grouping multiple specifications together to be applied to similar items.




The template may be used on each of the relevant location(s) to save you a lot of redundant data input, and to ensure consistent application of your specifications to each location.

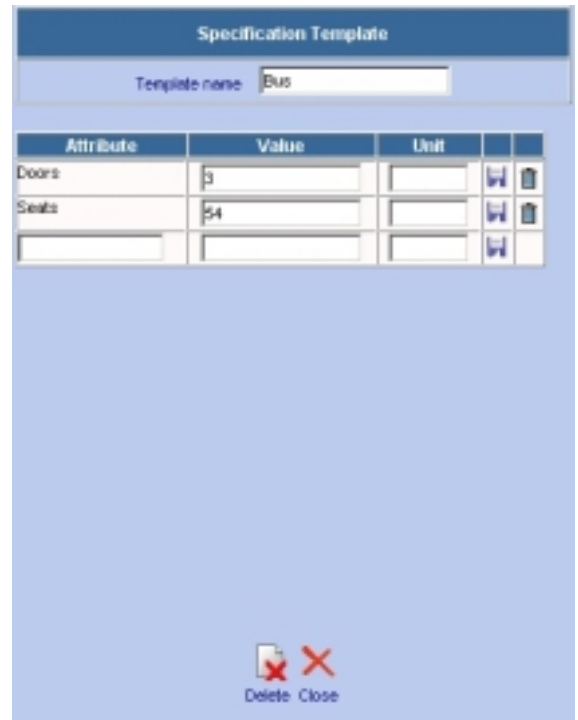
- To Access Specification Templates click on the  Specification Template button in the lower right corner of the Specification screen.
- There are options at the bottom of the Specification Template screen to Edit, Add New, Accept or Close.






7.6.1 Edit a Specification Template

To edit an existing specification template, select the template from the dropdown at the top of the Specification Template page (Available Template) . This will populate the fields on the screen that currently makeup that template. Click on the  edit icon to modify the template.


- To delete an attribute from the template, click on the  trash icon on that row.
- To modify the default value or measure unit for an attribute, edit the appropriate column on the screen and click on the  save icon for that row.
- To add a new attribute to the template, enter the Attribute, Value and Unit on the last line on the screen, and click the  save icon for that row.



7.6.2 New Specification Template



- To add a new specification template, click on the  new icon from the specification template page. A screen basically identical to the EDIT Template screen from above will popup.
- Enter the Template Name. This name will be what captures the different specification points.
- Enter the first Attribute, Value and Unit into the table underneath.
- Click on the  save icon to save that specification attribute to the template.
- Repeat the last two points until all specifications are entered for that template.
- When done, click on the  close icon to return to the main Template Selection screen.

7.6.3 Delete a Specification Template

To delete a specification template, recall the template for editing as explained above, and click on the  delete icon from the edit template screen.

7.6.4 Using a Specification Template

Once you have specification templates created, you can use them when creating a location. To use a specification template on a New or Existing location:

- Recall the location in Edit mode
- Click on the Specifications tab to view the Location Specifications screen.
- Click on the  Specifications template button to bring up the Specifications template selection window.
- Select the desired template from the drop down list at the top of the screen.
- Fill in some or all of the attribute values on the template list.
- Click on the  accept icon to save the information to the location specifications

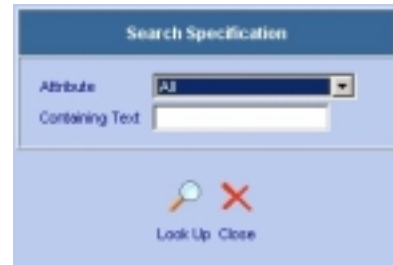
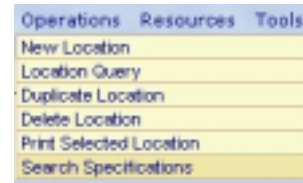


Attribute	Value	Unit
Classrooms	133	
Oyts	1	
Parking	200	

7.6.5 Searching Locations Using Specifications

To search for locations by specifications (from the main Location screen):

- Click on OPERATIONS from the Module Option Menu at the top of the screen, and select Search Specifications from the drop down menu.
- The Search Specification for screen will open.
- Select the Attribute you wish to search on – this drop down list is populated from data that exists in your database, Location Specifications, so you will only see data that is valid for your Specifications.
- Enter the searching criteria into the Containing Text field or leave it blank if you want to search only by the Attribute.
- Click on the 🔍 lookup icon.
- Result of your search will show in the standard location query list.



7.7 Viewing Equipment Lists

The *Equipment List* function allows you to view a list of equipment contained in a location. This is a view only function. If you want to edit the Equipment list for this location, you must do so in the Equipment module. Refer to the Equipment module chapter of this manual for more information.

To view the Equipment associated with a location (from the main Location screen):

- Retrieve an existing location, in EDIT mode.
- Click on **Resources** on the Module Option Menu, and select Equipment List from the drop down menu.
- OR
- Click on the Equipment List tab



- A screen similar to the one shown below will open, showing the list of equipment.

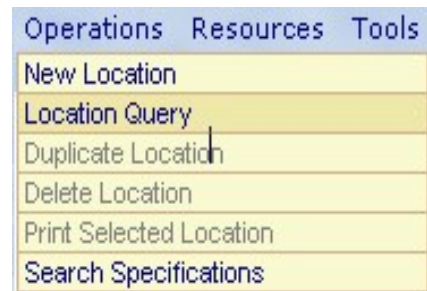
Equipment	Description	Cost To Date
1000002	Park Bench	47.55
1000003	Park Bench 200	43.43
1000004	Park Bench	419.90
ROOM322	ROOM 322 WEST WING	476.50
ROOM323	ROOM 323 WEST WING	42,808.08
ROOM324	ROOM 324 WEST WING	40.00
Total		42,914.63


7.8 Performing Location Record Queries



In Web Work, in order to quickly and easily find location records, a Query By Example method is used. Make sure you are in the Query mode. The mode is displayed in the lower left section of the Location module. For more information on Query by Example see the QUERIES chapter of this manual.

To perform a Location Query:

- Click on LOCATIONS on the Side Bar Menu module listing, in the Assets Group to open the Locations module in Query mode. (If you are already within the Location module, you can select Location Query from the **Operations** Module Option Menu drop down or click the.)
- If you enter the Location module and the screen is in a New mode, follow the step above to get back to the Query mode. The default mode is a user-defined function. For further information refer to the Overview Chapter and lookup User Settings.



- Enter selection criteria into any of the fields on the screen. The use of Wildcards is very useful at this point.
- Click on the  lookup icon at the bottom right to display a list of the records, matching the specified criteria. To open any of these Location records, highlight and click the location on the query result list. To retrieve

ALL of the locations from your query, click on **Select All**, and click Retrieve Records or the  retrieve icon. To a sub-set of records, click the checkbox beside the records you want and then Retrieve Records or the  retrieve icon.



To bypass the list screen, don't click on the Lookup button and click on the Enter key on the keyboard. The same records will be populated straight to the Location edit screen.

- The first location record will appear on the main screen, the rest will be in queue. You may navigate through the remaining records via the  navigation icons.




Comparison operators such as: "<, >, null, not null, comma (,), % and + sign" may be used to further define a query. See the QUERIES chapter for more information.

7.9 Printing Location Records

There are two ways to print location records. You can print any one individual location record at one time or multiple location records that you have selected and retrieved at one time.

7.9.1 Printing Individual Location Records

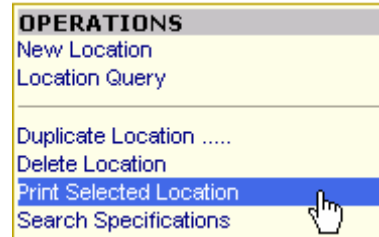
To print only the location retrieved to the Location screen:

- Recall an existing location on the main Location screen, in EDIT mode.
- Click on  print icon at the bottom right hand side of the screen.
- The selected record will open in a new browser window in a form of a Location report. This step is referred to as Print to screen.
- If you wish to print the Location report to the printer, click on the File pull down menu and select print to proceed with printing through the standard printing procedure of your operating system.

7.9.2 Printing Selected Location Records

To print selected locations retrieved to the Location screen:

- Perform a Location query to retrieve a group of Location records you wish to print.
- Click on **Operations** in the Module Option Menu and choose Print Selected Locations from the drop down menu.
- The selected records will open in a new browser window in a form of a Location report. This step is referred to as Print to screen.
- If you wish to print the Location report to the printer, click on the File pull down menu and select print to proceed with printing.



7.10 Locations - 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 locations of type “SCHOOL” – you end up with your query result set (eg: 50 of 200 total locations are type school). You retrieve your query results into the location module and it would show 1/50 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 50 locations ! If one of those reports had a conflicting criteria (say TYPE=SITE) , then the obvious result would be a report with 0 records showing (as the query contains only TYPE=SCHOOL there will be NO records of type=SITE)

NON-filtered reports will run using all information in the database (in our example , the entire 250 record database).

7.10.1 Running standard reports without QUERY filter

Ensure that you are in the location module, in QUERY mode, and that you are NOT working with any subset/query results of the location 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 Location 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 Location report to the printer, click on the File pull down menu and select print to proceed with printing.



7.10.2 Running standard reports with filters

- Run a query and return the result set to the Location module – you should now be in EDIT mode with the mode indicator showing Edit.
- 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 Location 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 Location report to the printer, click on the File pull down menu and select print to proceed with printing.

7.11 Links

You can view existing links or create new links using the Links feature. You may link drawings, pictures or any media the computer recognizes. You can link to a location, a group of locations, or to the whole module.

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

When applying links to Locations, it is important to note that applying a link to RELATED RECORDS ONLY will mean that this link will be available :

- From the location module when viewing this location

- From the workorder module when this location is the location of the workorder selected

- From the equipment module when this location is associated to the equipment selected