

Supplemental Manual

This Manual is designed as a supplement to the existing Web Work Version 6.0 User Manual. This supplement covers in depth the new features of Web Work 6.4.

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S.1 Overview of the Changes

The changes to Web Work 6.4 are wide ranging. From the addition of the Repair Order and Document Management Modules to the addition of the Look Up tab in almost every module, Web Work has become more powerful and easier to use all at the same time.

S.1.1 Summary of Major Changes

- User Control Panel
- Document Management
- Repair Order
- Master Records
- Look Up Tab
- Quick Work Order
- Meter Reading Error Checking
- Data Division on Inventory
- Customizable Fields for Request, Equipment and Work Order
- Run Time Filters on Custom Reports

Details of all the changes will be covered in the individual module sections.

S.2 Global Changes

There are some changes to Web Work that are major enough to warrant their own section in the User manual. These are those changes.

S.2.1 User Control Panel

The User Control Panel is one of the most exciting changes to this version of Web Work. The User Control Panel is used for easy navigation throughout Web Work. It's located on the right hand side of the Web Work screen.

The User Control Panel is unique for each User.

Users can use the buttons in the top left side to navigate between Work Orders . Equipment , Location . A cation .

Users have the ability to choose which module the Control Panel displays when first opened.

To set this click Help then User Settings. The User Settings screen will open. Select

User Control Panel Start Page and the Dashboard Start Page screen will open.

From the module dropdown menu select which module for the Control Panel to open.



×	<u>wo</u>	Request	
9	000049	40-Day Inspection	
	000012	Test Work Request	=
3	000123	Repair this part.	
1	000124	new work order into web work	
9	000125	Mark needs his boat fixed	
1	000048	40-Day Inspection	
3	000047	Elevator Maint - Comprehensive Qtrly Maint.	
	000046	Elevator Maintenance - Monthly	
1	000029	Change Log Testing 1	×



To change what is being viewed in the Control Panel click one of the icons at the top of the screen, Work Orders 🖳, Equipment 🎲 , Location 🛄 and Labour 🗐.

For each different module a dropdown menu will appear. Click on the desired item.

The module that the User Control Panel is functioning in will always be listed on the top right hand side of the User Control Panel.



S.2.2 Worklists

The User Control Panel uses Worklists to create lists that are unique to each user. To create a Worklist;

- Create a query in the Work Order, Equipment, Labour, or the Location module.
- When the results are returned click Select All and then click Add to Worklist.
 - This adds the selected records to the Worklist.

To clear items out of the Worklist and Recent lists;

- Place a checkmark in the box next to the WO Number for the items that will be removed.
- Click close X to remove the selected items from the list.
- To remove all items from the list, place a check in the top checkbox and click close X. This will remove all items from the Work List.

×		<u>wo</u>	<u>Request</u>
-	~	WO 1	Work order 1
-		000000	test2
-	~	000016	New Work Request 1
-		000015	New Work Request
-	~	000012	Test Work Request
-		000011	Repair Order
-		000010	Repair Order

S.2.3 Work Orders

The Control Panel for Work Orders has the ability to display Recent Work Orders, New Requests, Open Work Orders and Items in the users Worklist.

Recent is a list of all the Work Orders that the user has recently accessed.

New Request shows all Work Orders that have the status of NEWREQ. This displays the same information as clicking on the globe in the top left corner of the Web Work screen.

Open shows a list of all open Work Orders.

The Worklist is a list of items that is created by the user.

To see more specific information about a Work Order in the list, click on it. This will display some details about the Work Order.

The details screen will open just below the list.

 Details

 Work Order:
 000011

 Location:
 LOC 1
 Location 1

 Equipment:
 EQUIP 2
 Equip 2

 Request:
 Repair Order
 Equip 2

To move items in the list to the left side

of the screen in order to view the work order in more detail, click 🐔. This will move the Work Order over to the main screen for viewing and editing.

The graphs that are displayed below the detailed information can be tailored to display information of the users choosing. Right at time of publication these grafts need to be customized by Tero Consulting Ltd. for each user.

S.2.4 Equipment, Location and Labour

In the User Control Panel these modules have the ability to show recently accessed records and items added to the users work list.

S.2.5 <u>Master Records</u>

Master records are new to four of the modules in Web Work. The Procedure, Equipment, Location and Vendor modules now allow users to set a record as masters. When a record is set as Master only

Master	Yes	🔘 No	
Data Divi	sion 1.	4	<i>P</i>

people with permission to edit Master records will be able to change it, thus insuring greater security of data.

A master record is usually set up at the corporate level and is available to all divisions. Generally a user cannot modify master records unless he/she is given the right to **Edit Master** in the system security set-up in the Admin module.

S.2.6 Lookup Tab

Maintenance	Sele	ct all Unselec	t all Add to Worklist Retrieve Records	3b	b.	Order b	y: WONUM
 Work Request Work Order Repair Order 		WO Number	Request	Location ID	Equipment ID	Status	Open Date
Timecard		000000	test	MAIN MALL	EQUIP 1	APPR	2/22/2008
 PM Procedure 		000003	test			APPR	2/22/2008
• IT Helpdesk		000004	PM 1		1	APPR	2/22/2008
Assets		000005	PM 1			APPR	2/22/2008
 Equipment Route Reading 		000006	Test WO 1			APPR	2/22/2008
 Location Labour 	E	000007	PM 3			APPR	2/22/2008
Inventory		000008	PM 3			APPR	2/22/2008
Inventory		000010	Repair Order		1	APPR	2/24/2008
 Storeroom Vendor 		000011	Repair Order	LOC 1	EQUIP 2	COMP	2/26/2008
Purchasing	F	000012	Test Work Request		Concession of the	APPR	3/4/2008
 Purchasing Receiving 		000013	Procedure 0003		000007	APPR	3/7/2008
Item Request		000014	New Work Request	LOC 1	EQUIP 2	APPR	3/7/2008
Admin Proj Mgmt		000015	New Work Request			NEWREQ	3/7/2008
Projects		000016	New Work Request 1			NEWREQ	3/7/2008
Scheduling		000017	New WO 1			NEWWO	3/7/2008
Poc Mgmt Folder		000021	New PM 1			APPR	3/7/2008

The Lookup Tab now gives the user the ability to return to the query results at any time while working in that module. The Lookup Tab is now the first tab in every module giving users easy access to the records that were queried.

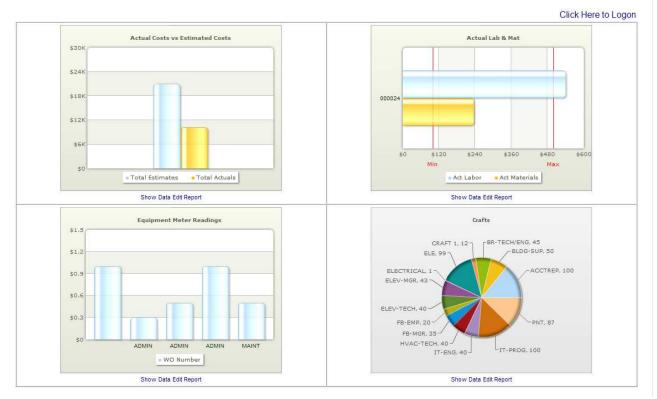
Lookup Main Estimates		
WO Number	000005	
Procedure		

To use the Lookup Tab, query for records as normal, when a record is selected

Web Work will open the Main Tab for that module. To return to the query results click on the Lookup Tab, from here choose the next record. The Lookup Tab keeps the last query run in that module until another query is run or the user moves to a different module or closes Web Work. The Lookup Tab has been added to all modules where the functionality of the module allows.

S.2.7 Dashboard

The Dashboard is one of the largest changes to Web Work in this release. The Dashboard takes the place of the Login Screen once the user has logged in.



The Dashboard is divided into four quadrants, each one showing a different graph that was created using Report Writer.

The graphs displayed are unique to each user. Each user has the ability to choose which graphs to display.

To set which graphs to display, once they have been created using report writer, click ^{Help}, then User Settings screen will open.

Choose Dashboard Charts and the Dashboard Charts screen will open.

User Settings			
Cli	ck on a setting selection to configure its value		
Query Sta	tus Filter		
Query Sor	t Order		
Maximum Query Records			
Operation After Creating New Record			
Keep Res	ources Window Open		
Toggle Prompt On Saving Procedure			
Change Password			
Autoshow	Attached Images		
Dashboard	d Charts		
User Cont	rol Panel Start Page		

	The Quadrants a with Quadrant 1 and Quadrant 4		
Quadrant 1	Actual Costs vs Estimated Costs	•	Using the pull do
Quadrant 2	Actual Lab & Mat	~	for each one of t
Quadrant 3	Equipment Meter Readings	~	Users can select four. You can al
Quadrant 4	Crafts	~	choose not to dis
			Once the graphs
	🔊 📙 🗙		selected, click sa
	Back Save Close		

The Quadrants are numbered left to right with Quadrant 1 in the top left hand corner and Quadrant 4 in the bottom right.

Using the pull down menu, choose a graph for each one of the quadrants.

Users can select one graph to display or four. You can also have the option to choose not to display graphs at all.

Once the graphs to display have been

elected, click save 🕅 to save the

graphs and click [^] to close the screen.

From the Dashboard the user can run the reports associated to the graphs or if the user has permission to access the Report Writer the user can edit the Report.

To Run the report from the Dashboard click **Show Data** under the graph. This will open the report in a new window.

If the user has access to Report Writer and wants to edit the report for a specific graph click **Edit Report** under the desired graph. The Report Writer window will open in a separate window.

To update the graph once changes have been made to the Report or if new data has been entered into Web Work that will be reflected on the graph click the **Refresh** button on the Dashboard. This will update the display of all graphs.



For more information on creating graphs in Report Writer please see section C.7.2

S.2.8 Links

The general functioning of links when addressing a website has not changed but the functioning of linked files has.

There are now two types of linked files; Web File and Network File.

Web File functions the same way as File did in previous versions of Web Work and saves a copy of the file to the Web Work server.

Network File allows users to store the file in some other location on their network. To create a Network File

Link click **Tools** and then Links. The Create/Edit/View Links screen will open. Click new to create a new link. The New Web Link screen will open.

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	New Web Link						
Title							
Description							
Type File	Network File						
Name/Web Address	Browse						
Division	P						
Accessible From	All modules This module only						
	This module only						

- Enter the title for the Link in the Title Field.
- Enter a Description for the Link in the description field.
- From the Type drop down list choose Network File.
- If the network address is known, enter it in the File Name/Web Address Field.
 If it is not known, click Browse...
 This will open a standard Windows file Browser.
- Browse to the file that you would like to link to and click open. The file name and address will auto fill into the field.
- Enter a data division if required and choose if the link will be available.

Users now also have the ability to choose whether or not a linked image will automatically show when the associated record is opened.



Network Files will only work if they are stored in a Network Location. Files stored on a local drive will not open.

To turn the Auto Display on or off:

- Click Help and then User Settings
- The User setting screen will open.
- Click on Autoshow Attached Images and the Autoshow Attached Images screen will open.
- Select YES or NO from the New Setting drop



• Click to close the screen.

Au	toshow Attached Images
Current Setting New Setting	Yes

S.3 Miscellaneous Changes

Two other changes worth noting but don't fit into a specific category are the ability for Web Work to detect your display settings and automatically adjust the Web Work screen to give the user an optimal working area and the second change is the System Timeout Warning screen.

The System Timeout Warning screen will appear when there has been no activity in Web Work for the time specified in the System Default Settings.

By clicking Ok, Web Work will remain open. By taking no action or by clicking close, Web Work will close.

Your session will end in 26 seconds if no response is made.

Click OK to continue working with Web Work. Click Close to end your Web Work session.

S.4 Maintenance



S.4.1 Work Request

The Work Request module now has the ability for the user making the request to mark the request as a Charge Back and add in the Client Code for the Charge Back. This is beneficial for the user approving Work Orders as it takes away confusion of having to know what needs to be a Charge Back and what doesn't.

Open Date Contact	3/7/2008		Target Date Department	DEP 2	2
Phone Client Code	CC 1	₽	СВ	YES	₽

S.4.2 Work Order

The Work Order module has gained two new Tabs; the Lookup Tab and the Totals Tab.

There have also been many changes to the individual Tabs.

	Lookup M	ain Estimates Actua	ls Accounts Status History Complete Totals
ł	WO Number	000054	Elevator Maintenance - Monthly
	- ·	000000	

S.4.3 Main Tab

The Main Tab now has four new fields; the Equipment Address Fields, the Client Code and Chargeback fields.

The Equipment Address Fields will auto populate with the information that is entered in the Equipment address fields in the Equipment Module.

The Chargeback and Client Code fields allow the user to mark the Work Order as a Chargeback instead of just the individual labour and material entries.

S.4.4 Estimates Tab

The Estimates Tab now has two new sub tabs; the Services Tab and the Schedule Tab. Please see the sub sections for each of these tabs for more information.

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S.4.5 Labour Tab

The appearance of the Labour Tab has not changed. However the Labour Resources screen used for entering information into the Labour Tab has.

	Lat	oour I	Resource		
Work Order #	000054		Task Number	10 Task 1	~
Transaction Date	4/7/2008		Employee		2
Craft		1	Labour Type	REG	₽
Pay Scale	1		Hours		
Rate]	Additional Cost		
Tax1]	Tax 2		
Total Cost]	Account	MAINT	₽ _
Description					
Charge Back 📃					
Markup Amount]	Markup Percent		%
Chargeback Tax1]	Chargeback Tax2		
			ChargeBack Amount	0	
		H	×		
		Save	Close		

Now when entering Labour Resources, the user can click on the calendar 🛄 icon next to the Transaction Date field and Date pick list will open. <<

Simply click the date that is required and the Date Pick list will close and the date selected will fill the Transaction Date Field.

The other changes to the Labour Resources are the addition of the Charge Back Check Box, Markup Amount, Markup Percent and Chargeback Tax1 and Tax2. These allow for more detail tracking of Chargeback expenses associated with the labour for the Work Order.

When the user enters values into any of the fields, the ChargeBack Amount field is automatically calculated.

S.4.6 Materials Tab

When entering Material Estimates to the Materials tab it is possible to use the Date Pick list to choose the Transaction Date.

- To use the Date Pick list, click on the calendar III icon next to the Transaction Date field.
- The Date Pick List screen will open.

Apr 2008

We Th

2 1

> 16 17 18

3 4 5

Su

6 7 8 9 10 11 12

13

20 21 22 23 24 25 26

27 28 29 30

Mo Tu

14 15 >>

19

Fr Sa • Choose the appropriate date by clicking on it with the mouse.

_ _

• The Date Pick list will close and the date selected will fill the Transaction Date Field.

The other notable change to the Materials Resources screen is the addition of the Markup Percent field. The user can now choose to enter a fixed amount in the Markup Amount field or enter a percentage in the Markup Percentage field. If the user enters a markup percentage, Web Work will calculate the percentage of the Extension entered, add that value to the extension and enter that value in the Chargeback Amount Field.

S.4.7 <u>Services Tab</u>

The Services Tab is a completely new function for Web Work. The Service Tab is used to track Services offered by a Vendor used on a Work Order.

Tasl	ks 🖌 Labou	ır ∬ Materials ∬ Ser	vice Tools Schedule				
Sele	ct all Unse	elect all					
	lssue Date	Service Code	Description	Account	Quantity	lssue Price	Extension
	4/7/2008	HB-0001	A to Z inspection Service	MAINT	1	\$100.00	\$109.00
					Total		\$109.00



For More Information on Services, Please see Section 5.3.3

S.4.8 Adding a Service to a Work Order Estimate

_ _

To add a New Service to the Service Tab click new service button and the Service Resource screen will open.

	Sen	vice	Resource		
Work Order #	000054		Task Number		~
Transaction Date	4/7/2008				
Vendor		₽	Service Code		₽
Rate			Unit		₽
Quantity			Add. Cost		
Tax2]	Tax2		
Account	MAINT	₽	Extension		
Description					
Charge Back 🛛 🗹					
Markup Amount]	Markup Percent	0	%
Chargeback Tax1]	Chargeback Tax2		
			Chargeback Amount		

- If the Vendor code is known enter it into the Vendor Field and click the Tab key to validate the code. If it is not known, click search button I next to the Vendor Field. The Vendor Look Up list will open. Choose the required Vendor from the list and the Vendor field will auto populate with the Vendor that was selected.
- If the Service code is known enter it into the Vendor Field and click tab to validate the code. If it's not
 known, click the search button P next to the Service Code Field. The service search screen for that
 Vendor will open.
- Click the filter I icon to populate the Pick List with available services from that vendor.
- Select the required service from the list.

	Servi	ces (Vendor:000002)	
Vnedor	000002	✓ <>	
Service Code			
Description		Service Code	
Dependent			
Decemption			
Vendor	Code	Description	
Vendor	Code HB-0001	Description A to Z inspection Service	
Vendor 000002		•	
· ·	HB-0001	A to Z inspection Service	

- The Service Code, Rate, Unit as well as the Description fields of the Service Resources screen will auto populate with the information entered in the Vendor Services tab for that service.
- Fill in the Quantity field and click tab. The extension price will be auto calculated.
- Fill in any other information that is important to be recorded and click **I** to save the service to the Services tab.

S.4.9 <u>Tools Tab</u>

The changes to the Tools Tab are located in the Tools Resources screen. The tools screen now has the same standardized features that you will find in both the Labour and Material Resources screen. These include the Transaction Date Look Up, Chargeback Check Box, Markup Amount, Markup Percent, and Chargeback Tax1 and Tax2 fields.

S.4.10 Schedule Tab

The Schedule Tab works in conjunction with the Scheduling module. When an Employee is assigned the Work Order in the Scheduling module it is now listed under the Schedule tab.

Tasks Labou	r Materials Servi	ice Tools Scl	nedule	
Date	Name	Hours	Туре	Description
4/7/2008	Andrew Johnson	4	REG	

S.4.11 Actuals Tab

All the changes that have been added to the Estimates tab have been carried over to the Actuals tab.

S.4.12 Services Tab

When a PO has been created for a Service, the user can now receive that service directly from the Services Tab.

To Receive the Service;

• Click the receive button ¹ to open the Receive Service.

			Receive Service				
ele	ct all Unselec	t all					
	PO Number	ServiceCode	Description	Vendor	Vendor Part #	Qty Ordered I	Qty Received
	000039 SR001		HAVC Cleaing and Maintenance	000002	1TR45E	1	(

- The Receive Service screen will list the PO's with Services created for the Work Order that have been approved.
- Select the Services to receive to the Work Order by placing a check beside the PO Number.
- Click the receive button ¹ to receive the Service to the Work Order.
- The Service will now be listed under the Actual Services tab of the Work Order.

lssue Date	Service Code	Description	Account	Quantity	lssue Price	Extension
4/7/2008	INSTALL	Installation Service		1	\$56.00	\$62.72
4/10/2008	SR001	HAVC Cleaing and Maintenance		1	\$50.00	\$56.00
				Total		\$118.72



For more information on the individual features, please see section C.3.2.2.

S.4.13 Complete Tab

The Complete Tab now has fields for both the Primary meter and the Secondary meter.

S.4.14 Totals Tab

VO Number	000054		Eleva	ator Ma	intenance -	Month	ly .			~		
Procedure	000003									~		
СВ					Estimate	•s (0)	Actual	. 0	Both	0		
Internal	,									Ŭ		
Labour 🗹	Materials	V	Tools	~	Service	~						
ChargeBack												
Labour	Materials	 Image: A set of the set of the	Tools	 Image: A set of the set of the	Service	 Image: A set of the set of the	Sum	mary (Det	ailed 🧿) 🌙	D

The Totals Tab is used for reporting on the specific information that is entered in both the Estimates and the Actuals Fields.

The Totals Tab allows the user to choose to report on either Actuals, Estimates or both. Once this information is entered the user can choose what sections of the Work Order to report on. The report can include Labour, Materials, Tools and Services. These can be reported on for both Internal Charges and Chargeback's.

The last section that must be made is whether to run a Summary or Detailed report. The Summary report simply lists the costs associated with the Labour, Materials, Tools, and Services, or whichever sections were reported on and sums them up.

The Detailed Report breaks down the information into individual entries for each section.

Once all the criteria for the report have been selected, click the lookup button P and the report will open in a new page.

S.4.15 Generating a PM via the Work Order Screen

Many users often complete scheduled PMs on equipment when they have it in the shop for routine maintenance i.e. – doing an unscheduled brake job for Equipment # 45 they may decide to do an Oil change. Since the oil change is already scheduled within Web Work using the PM module users can now incorporate the PM into the Work Order they are currently working on.

- 1. Create a New Work Order as usual by filling in all required information and click save.
- 2. Check if there are any upcoming PM's by click the Plookup next to the PM number field. This will open the PM List window.

PM List (Equipment:AHU-001)									
PM Numbe	r Description	Interval	Unit	Next Due	Last PM				
000022	Elevator Maintenance - Monthly	30	DAY	4/10/2008					
000032	HVAC Cleaning Service	1	MONTH	4/15/2008					
Generate this	PM work order>								
		X							

The user can now select a PM from the pop-up and click on GENERATE to generate a PM. This will add the PM information to the Work Order.

The user can now complete the PM and Work Order as per usual.

S.4.16 Reports

The Work Order module has a new report. The report is titled Fund Recovery Report. The purpose of this report is to allow the user to run a report that will list all the Charge backs for a period of time and for a specific Client Code if desired.

To run the report:

- In the Work Order Module Click Tools and then Reports
- Click on Fund Recovery Report on the left hand side under Standard Reports
- The Fund Recovery Report window will open

nd Recovery Re	
Client Code Comp Date From	 CB 💿 Yes 🔘 No To

- Enter the Client Code or click *P* to look the code up.
- Chose whether to report on Chargeback's or non Chargeback's.
- Enter the Comp Date From date (This is the start date of the time period) or click is to open the Calendar Pick list.
- Enter the To date (This is the end date of the time period) or click It to open the Calendar Pick list.

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- To run the report click Run and the report will open in another window.
- Once the Fund Recovery Report has run, the records displayed will be locked so that they will not be shown the next time the report is run.

S.4.17 PM

Not only did the PM module gain the Lookup Tab, it is now more streamline and intuitive to use. PM's can now be both Meter Based and Calendar based at the same time and can be triggered by two meters.

S.4.18 Main Tab

PM Number	000022		Elevator Mainte	enance - Month	ily			
Procedure	000003	P						
Location	BURNABY	P	Sentra Corporati	ion-Burnaby		Room		
Equipment	AHU-001	P	Air Handling Unit	: 001		Priority	[- 1
Calendar Base	ed PM		Interval	30		Interval Unit	DAY	_,
Next Due Date	4/10/2008	E	Override Date	í			0	
1.0		1	Interval		-	Meter Name		- 1
Usage Based	PM Dual Meter		interval					
and the second sec	PM Dual Meter		194273273776	-	-	Meter Range	í .	_
Usage Based Current Reading	PM Dual Meter		Next PM Reading			Meter Range	Í	l
Current Reading	PM Dual Meter	Order E	Next PM Reading	(a)h) Next [omplete PM	
Current Reading	ate PM Work (Order E	Next PM Reading	(a)h	Next [omplete PM	
Current Reading Gener	ate PM Work (Order E	Next PM Reading	(a)h) Next [Due O C	omplete PM	
Current Reading Gener Last Generatio Date	ate PM Work (Order E	Next PM Reading) Next I	Due OC		
Current Reading Gener Last Generatio Date Has Open WO	ate PM Work (Order E	Next PM Reading Based On : Last PM Date		● Next [Due OC Last PM Reading		
Current Reading Gener Last Generatio Date Has Open WO Account	ate PM Work (Order E	Next PM Reading Based On : Last PM Date Last Targeted W(• •) Next [Due OC Last PM Reading Average Usag	e	
Current Reading Gener Last Generatio	ate PM Work (Drder E	Next PM Reading Based On : Last PM Date Last Targeted W(Duration	• •) Next [Due OC Last PM Reading Average Usag Craft	e	
Current Reading Last Generatio Date Has Open WO Account Crew	ate PM Work (Drder E	Next PM Reading Based On : Last PM Date Last Targeted W(Duration Supervisor	• •) Next I	Due C Last PM Reading Average Usag Craft Employee	e ELEV-TECH	;

The PM Main Tab now has an Is Locked checkbox. Check this box to lock the PM and stop any updates from changing an associated Procedure.

The PM Main tab has many changes, the most notable of which is the separation of Calendar Based and Meter Based settings.

To create a PM that is both Meter and Calendar based simply fill in the each section.

For example; if you have a PM that must generate every 30 days or 150 hours simply create a PM that has the Calendar Based PM section filled out for a 30 day interval and fill out the Usage Based section just as you would for a PM that will generate every 150 hours.

The user now also has the ability to search for Nested PM's by adding a check in the Nested PM check box of the Query screen.

S.4.19 Setting Up a Dual Meter PM

Web Work's new PM module can generate WO's from two different meters. To setup a PM using two different meters:

- First create the PM using the Primary Meter in the Usage Based PM section.
- Click save button **I** to save the PM.
- Click Resources and then Second Meter Set Up. The Second Meter Setup Screen will open.

Second Meter Set Up						
Meter Name	Revolutions	₽				
Current Reading						
Interval	100000					
Next PM Reading	100000					
Meter Range	1000					
	R 🗙					
	Save Close					

- Click P next to the Meter Name Field to access the Meter Pick List
- Pick the Second meter that you would like to use.
- Enter the Interval, Next PM Reading and Meter Range and click save 🖬 to save the Second meter setup.



When using a Dual Meter PM or a Calendar and Meter based PM, the PM will generate a WO when either of the two Criteria is met. The next due reading will update for both meters or for the meter and the Next Calendar date due.

S.4.20 Estimates Tab

There are many changes to the estimate tab, same as the changes made to the WO Estimates tab. Please see section **C.4.2.2** for more detail.



When Generating PM's, This PM Record is now the default instead of All Records.

S.4.21 Procedure

The Procedure Module now has the Lookup Tab to enable easy switching between different procedures. The implementation of Master Records means tighter security for the procedures that are entered into the system.

There are many changes to the procedure tab, same as the changes made to the WO Estimates tab. Please see section **C.4.2.2** for more detail.

S.4.22 Repair Order

The Repair Order screen is a brand new module for this version of Web Work. The best way to think of the Repair Order is a way of quickly entering a Work Order. The most important parts of the Work Order module are displayed on one page.

The Repair Order is listed in the Maintenance section of Web Works just below Work Order.



Just like every other module in Web Work the Repair Order opens in Query Mode.

S.4.23 Creating a New Repair Order

To create a new Repair Order choose New from the Mode Drop down screen. This will create a New Work Order number and populate the WO Number field with it and fill in the Open Date with the Current date.

Mode	New	\mathbf{v}
Open Date	4/8/2008	
WO Number	000131	

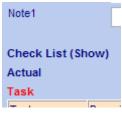
If the user wishes to change the Open Date they must change it before the Repair Order is saved.

If using a Procedure, enter the Procedure number first. If the Procedure number is not known click to open the Select a Procedure screen. This will populate the common fields that the repair and the procedure order share.

Repair Order		Mode	New 💌					
Procedure	🖌 Work Type 🕅 🖌 A/C	Open Date	4/8/2008					
Location ID	P	WO Number	000131					
Equipment ID	P	EQ Type						
Serial No.	PM Number	Priority		1				
Note1	Note2							
		=						
Fill in any other fields that are required for the Repair Order and click save III to save the repair order.								
To cancel the creation of the Repair order click close \checkmark to discard.								

Repair Order	40-Day Inspec	tion				1	Mode	Edit	~
Procedure	000006	🖌 Work Type	PM	- A	/C MAINT	P	Open Date	3/20/2008	
Location ID	VAN-BR		r Room				WO Number	000048	
Equipment ID	000019	Flec	Pump				EQ Type	PUMP	
Serial No.	GGGDADF415	451343		PI	Number 000012		Priority	2	2
Note1		1	Note2					LA:	×
Check List (Show Actual Task)								-
Task Des	scription				Memo				
									5
Material									
TaskNum Date	8	Storeroom	ItemNum		ItemDesc	Quar	ntity Price	Extension	
₩ 3/20	0/2008	MASTER		2		1			
Labour		-						-	
TaskNum Date		Emp/Vendor	N	ame			Hours	Rate	
3/20	0/2008								5
Service 💏 Click in	con to add all pu	irchased service to	actual serv	vice.					
TaskNum Date	i annul	Vendor	ServiceCo		Description	Quai	ntity Price	Extension	terrer li
3/20	0/2008	P		\$		1			H
and a second	W20/2008	KM Ho	eading Date ourMeter ult Code 2	20	2008	HR Fault	Code 3	J	2
					2		c	Complete	

- Once the Repair Order is saved the Actuals will be displayed. To add estimates click **Check List** (Show).
- This will open the Check List or Estimates.
- Items shown in Yellow are Estimates; items shown in Pink are Actuals.



S.4.24 <u>Repair Order Estimates</u>

Task Select A	All Unselect All							
Task	Description			Memo				4
10	Inspection #1							
20	Inspection #2							
								ы
Material								
TaskNum S	Storeroom	ltemNum	ItemDesc		Quantity	Price	Extension	
~	MASTER	<u> </u>			1			5
Labour								
TaskNum E	Emp/Vendor	Name			Craft	H	ours	
~		_ ₽				? [5
Service								
TaskNum	Vendor	ServiceCode	ServiceDesc		Quantity	Price	Extension	
~	~	<u> </u>			1			퉈

S.4.25 Adding an Estimate Task

To add a Task to a Repair Order;

- Enter a task number in the Task column.
- Enter a task description in the Description column.
- Enter a memo in the Memo column.
- Click save 🖬 at the end of the row to save the task.
- Repeat for each additional task.

S.4.26 Adding an Estimate Material (Stocked Item)

To add a Material to a Repair Order;

- Select a task from the TaskNum dropdown list to associate the material to.
- If the item number is known, enter it into the ItemNum field and click tab to validate the code. If the item number is not known, click lookup to open the Select an Item screen.
 - Once the item number has been entered, the ItemDesc and Price field will be auto filled with the Item information from the Inventory module.
- Enter a quantity for this item and click tab. The Extension price will automatically be calculated.
- Click save 🛱 at the end of the row to save the Item.

S.4.27 Adding an Estimate Material (Non-Stocked Item)

- Select a task from the TaskNum dropdown list to associate the material to.
- Remove the default storeroom from the storeroom field.
- If the item number is known, enter it into the ItemNum field and click tab to validate the code. If the item number is not known, click lookup *P* to open the Select an Item screen.
 - Once the item number has been entered, the ItemDesc and Price field will be auto filled with the Item information from the Inventory module.

TaskNum	Emp/Vendor	Name	Craft	Hours	
			CRAFT 1	1	
	SAM.DONALDSON	Sam Donaldson	ELEV-TECH	2	
	000015	HAVC Repair Seattle		1	
~	•		P		-

- Enter a quantity for this item and click tab. The Extension price will automatically be calculated.
- Click save 🛱 at the end of the row to save the Item.

S.4.28 Adding an Estimate Material (Non-Inventory Item)

- Select a task from the TaskNum dropdown list to associate the material to.
- Remove the default storeroom from the storeroom field.

Material Sel	Naterial Select All Unselect All							
TaskNum	Storeroom	ltemNum	ItemDesc	Quantity	Price	Extension	4	
10	MASTER	000006	Filters, 20mm, Micronic	1	\$15.00	\$16.80		
	MASTER	BELT_17	17 inches transmission belt	1	\$50.00	\$56.00		
		Non Inventory	3/4 Lug Nut	5	\$1.50	\$8.41		
~	MASTER	P		1			H	

- Enter an item number for this item. (If the number entered is in the Inventory module the information for that item will auto fill the other fields).
- Enter a description for this item.
- Enter the Quantity for the Work Order.
- Enter the Price of the Item.
- Enter a quantity for this item and click tab.
- Click save F at the end of the row to save the Item.

S.4.29 Adding an Estimate Labour (By Employee/Vendor ID)

Adding an Estimate Labour entry is very much like adding an Estimate Material entry.

- Select the task to associate the Labour entry by using the dropdown list in the TaskNum column.
- If the Employee code is known, enter it in the Emp/Vendor Field and click tab. This will validate the code and fill in the Name and Craft associated with that record. If the Employee Code is not known, click look up P next to the Emp/Vendor field. This will open the Employee/Requester Selection screen.
- Enter the number of hours in the Hours field.
- Click save F at the end of the row to save the Labour entry.

S.4.30 Adding an Estimate Labour (Craft)

- Select the task to associate the Labour entry by using the dropdown list in the TaskNum column.
- If the Craft code is known, enter it in the Craft field and click tab. This will validate the code. If the Craft Code is not known, click P next to the Craft field. This will open the Select Craft screen.
- Enter the number of hours in the Hours field.
- Click save 🖬 at the end of the row to save the Labour entry.

S.4.31 Adding an Estimate Service

Adding an Estimate Service is just like adding the other estimates to the Repair Order.

Service Sele	ect All Unselect All						
TaskNum	Vendor	ServiceCode	ServiceDesc	Quantity	Price	Extension	I.
	000002	SR001	HAVC Cleaing and Maintenance	1	\$50.00	\$56.00	
~	P	P		1			5

- Select the task to associate the Service entry by using the dropdown list in the TaskNum column.
- If the Vendor code is known, enter it in the Vendor Field and click tab. This will validate the code. If the
 Employee Code is not known, click lookup P next to the Vendor field. This will open the Select a Vendor
 screen.
- If the Service code is known, enter it in the Vendor field and click tab. This will validate the code and fill
 in the ServiceDesc and Price fields. If the service code is not known, click lookup P next to the Service
 field. This will open the Services screen.
- Enter the number of hours in the Hours field.
- Click save I at the end of the row to save the Service entry.

S.4.32 Repair Order Actuals

When the Repair Order is first opened the Actuals are displayed. There are two ways to enter Actuals in the Repair order.

S.4.33 Copying Estimates to Actuals

Users can copy Estimates to the Actuals in the same fashion that is used to copy Estimates to Actuals in the Work Order Module.

To copy Estimates to Actuals;

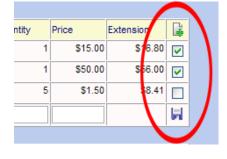
- Each section (Tasks, Material, Labour, Service) must be copied separately.
- Click Check List (Show) to display the estimates.
- Place a check mark next to the Estimate that is to be copied to Actuals.
- Click new 4 to copy estimates to Actuals
- Repeat for each section.

S.4.34 Manually Entering Actuals

C4.34.1.1.1 Adding an Actual Task

To add a Task to a Repair order;

- Enter a task number in the Task column.
- Enter a task description in the Description column.
- Enter a memo in the Memo column.



- Click save 📕 at the end of the row to save the task.
- Repeat for each additional task.

Task			
Task	Description	Memo	
10	Inspection #1		
20	Shut Out Power		
			H

S.4.35 Adding an Actuals Material (Stocked Item)

To add a Material to a Repair Order;

- Select a task from the TaskNum dropdown list to associate the material to.
- The default Storeroom is always entered into the Store. If the Material is being issued from a different storeroom click lookup P next to the Storeroom field to open the Select a Storeroom screen.
- If the item number is known, enter it into the ItemNum field and click tab to validate the code. If the Item Number is not known, click lookup P to open the Select an Item screen.
 - Once the item number has been entered the ItemDesc and Price field will be auto filled with the item information from the Inventory module.
- Enter a quantity for this item and click tab. The Extension price will automatically be calculated.
- Click save 🖬 at the end of the row to save the Item.

S.4.36 Adding an Actual Material (Non-Stocked Item)

- Select a task from the TaskNum dropdown list to associate the material to.
- Remove the default storeroom from the storeroom field.
- If the item number is known, enter it into the ItemNum field and click tab to validate the code. If the item number is not known, click lookup P to open the Select an Item screen.
 - Once the item number has been entered the ItemDesc and Price field will be auto filled with the Item information from the Inventory module.
- Enter a quantity for this item and click tab. The Extension price will automatically be calculated.
- Click save দ at the end of the row to save the Item.

S.4.37 Adding an Actual Material (Non-Inventory Item)

- Select a task from the TaskNum dropdown list to associate the material to.
- Remove the default storeroom from the storeroom field.
- Enter an item number for this item. (If the number entered is in the Inventory module the information for that Item will auto fill the other fields)
- Enter a description for this item.
- Enter the quantity for the work order.
- Enter the price of the Item.
- Enter a quantity for this item and click tab.
- Click save 🖬 at the end of the row to save the Item.

Material								
TaskNum	Date	Storeroom	ltemNum	ItemDesc	Quantity	Price	Extension	
	4/10/2008		Non Inventory	3/4 Lug Nut	5	\$1.50	\$8.40	
~	4/10/2008	MASTER	<u> </u>		1			2

S.4.38 Adding an Actual Labour (By Employee/Vendor ID)

Adding an Estimate Labour entry is very much like adding an Actual Material entry.

- Select the task to associate the Labour entry with by using the dropdown list in the TaskNum column.
- If the Employee code is known enter it in the Emp/Vendor Field and click tab. This will validate the code and fill in the name and craft associated with that record. If the Employee Code is not known, click lookup P next to the Emp/Vendor field. This will open the Employee/Requester Selection screen.
- Enter the number of hours in the Hours field.
- Click save 🛱 at the end of the row to save the Labour entry.

S.4.39 Adding an Actual Labour (Craft)

- Select the task to associate the Labour entry with by using the dropdown list in the TaskNum column.
- If the Craft code is known enter it in the Craft field and click tab. This will validate the code. If the Craft code is not known, click lookup P next to the Craft field. This will open the Select Craft screen.
- Enter the number of hours in the Hours field.
- Click save 📕 at the end of the row to save the Labour entry.

Labour						
TaskNum	Date	Emp/Vendor	Name	Hours	Rate	
	4/10/2008	SAM.DONALDSON	Sam Donaldson	2	\$40.00	
~	4/10/2008	P				H

S.4.40 Adding an Actual Service

Adding an Actual Service is just like adding the other estimates to the Repair Order

- Select the task to associate the Service entry with by using the dropdown list in the TaskNum column.
- If the Vendor code is known enter it in the Vendor field and click tab. This will validate the code. If the
 Employee code is not known, click P next to the Vendor field. This will open the Select a Vendor
 screen.
- If the Service code is known, enter it in the Vendor field and click tab. This will validate the code and fill
 in the ServiceDesc and Price fields. If the Service code is not known, click lookup P next to the Service
 field. This will open the Services screen.
- Enter the number of hours in the Hours field.
- Click save 🖬 at the end of the row to save the Service entry.

Service 🚸 Cl	Service 🏟 Click icon to add all purchased service to actual service.									
TaskNum	Date	Vendor	ServiceCode	Description	Quantity	Price	Extension			
	4/10/2008	000002		HAVC Cleaing and Maintenance	1	\$50.00	\$56.00			
~	4/10/2008	P	P		1			Ы		

S.4.41 Receiving a Service for a Repair Order

Users working in the Repair Order screen can receive a service from a PO directly in the Repair order screen.

To Receive a Service from a PO;

Click receive v to open the Receive Service.

	Receive Service									
ele	ct all Unselect	all								
	PO Number	ServiceCode	Description	Vendor	Vendor Part #		Qty Received			
	000039	SR001	HAVC Cleaing and Maintenance	000002	1TR45E	1	0			

- The Receive Service screen will list the PO's with Services created for the Repair Order that have been approved.
- Select the Services to receive to the Repair Order by placing a check beside the PO Number.
- Click receive to receive the Service to the Repair Order.
- The Service will now be listed in the Actual Services section of the Repair Order.

S.4.42 Completing the Repair Order

The lower section of the Repair Order (below the actuals) is where the information for the completion of the PM is entered.

Comp Date	4/10/2008	•	Reading Date	4/10/2008				
ODOMETER	100	КМ	HourMeter	20	HR			
Fault Code 1		₽	Fault Code 2		₽	Fault Code 3		₽
Comp Remarks	Completed as Requeste	d		~			-	
				~			Complete	

- Enter the date Completed in the Comp Date field
- Enter the date the Meter readings were taken if applicable.
 The Comp Date and the Reading Date default to the current date.
- If the Equipment that the Repair Order has been created for has a Primary and Secondary meter they will be displayed.
- Enter Fault Code 1, Fault Code 2, and Fault Code 3.
- To complete and save the Repair Order, click Complete
- When viewing the Repair Order, if there is no Complete the Repair Order has already been completed.

S.4.43 Repair Order Query

Querying in the Repair Order is limited to querying by Work Order Number.

Repair Order	E	Mode	Query 🖌
Procedure	🖌 Work Type 🚺 🕹 A/C	Open Date	
Location ID	×	WO Number	
Equipment ID	×	ЕQ Туре	
Serial No.	PM Number	Priority	P
Note1	Note2		×

To query Work Orders enter the Work Order number in the WO number field and click the Enter key on the Keyboard.

in the lower right hand corner of the screen

If the Work Order number is not known, click I next to the WO number field, this will open the Work Order Selection screen.

Work Order Selection								
WO Number	12	V						
Request		, N						
WO Number	Reque	st						
000012	Test Work Request							
000112	Quarterly Nested Procedure							
000120	HVAC Cleaning Service							
000121								
000122	this is a new work order.							
000123	Repair this part.							
000128	Change Out PM							

The Work Order Selection screen allows the user to limit the search based on WO Number or the Request.

The wild card function is built into these fields so all that is required is for the user to enter some partial data and the Work Order Selection screen will return all non-completed matching records when

filter Y is pushed.

To retrieve the Work Order information simply c lick on it. This will retrieve the Work Order and populate the Repair Order with information.

						3		2	Edit	
	40-Day Inspec		Revenue -	1.5	a bandana.		🗧 Mod			×
ocedure	000006	🔸 Work Type	PM	A	IC MAINT	4	Ope	n Date	3/20/2008	
cation ID	VAN-BR	Bo	iler Room				WO	Number	000048	
uipment ID	000019	Ele	c. Pump				EQT	Гуре	PUMP	
rial No.	GGGDADF415	5451343		PI	Number 000012		Prio	rity	2	
te1		P	Note2					1		X
ieck List (Shov tual <mark>sk</mark>	N)									
isk De	escription				Memo					
										1
iterial									= 1.	
iskNum Dat		Storeroom	ItemNum		ltemDesc	Q	uantity	Price	Extension	
✓ 3/2	20/2008	MASTER		2		1				5
bour										
iskNum Dat		Emp/Vendor	6.532	ame			Hour	rs F	late	
✓ 3/2	20/2008		P][[5
rvice 🔷 Click IskNum Dat		urchased service t	o actual serv ServiceCo		Description	Q	Jantity	Price	Extension	
▼ 3/2	20/2008	1		P		1				5
den sone	3/20/2008 100	км	Reading Date IourMeter Fault Code 2	3/20/2		HR Fa	ult Code 3			
OOMETER uit Code 1		км	lourMeter			HR	ult Code 3		v	

When the Repair Order opens a record it automatically displays the Actuals for that Work Order. If the user wishes to view or enter estimates they must click on **Check List (Show)**.

Note1 Check List (Show) Actual Task

Items listed in Yellow are estimates; Items listed in Pink are Actuals.

S.4.44 Generating PMs via the Repair Order

Many users often complete scheduled PMs on equipment when they have it in the shop for routine maintenance i.e. – doing an unscheduled brake job for Equipment # 45 they may decide to do an Oil change. Since the oil change is already scheduled within Web Work using the PM module users can now incorporate the PM into the Repair order they are currently working on.

Select 'NEW' from the Mode Drop-Down.

Repair Order	8		Mode	New 💌
Procedure	🖌 Work Type 🕅 🥕 A/C		Open Date	6/8/2008
Location ID	2		Work Order	000226
Equipment ID	2		EQ Type	
Serial No.	PM Number	₽	Priority	
Note1	Note2			

Select an Equipment ID from the Lookup List and click save.

Repair Order		8	Mode	Edit 💌
Procedure	🖉 🖌 🖉	ork Type RM 🕹 A/C MAINT	Open Date	6/8/2008
Location ID	BURNABY	Sentra Corporation-Burnaby	Work Order	000227
Equipment ID	AHU-001	Handling Unit 001	EQ Type	
Serial No.	123-aace-56ED	PM Number	Pority	P
Note1		Note2		a 🗛 🗙 👘 🖉

Click on the PM NUMBER look-up to open the PM list screen.

The 'PM NUMBER' Look-Up list will populate with all PM's (if any) associated to the selected Equipment ID.

PM List (Equipment:AHU-001)										
PM Number	Description	Interval	Unit	Next Due	Last PM					
	Elevator Maintenance - Monthly	30	DAY	4/10/2008						
000032	HVAC Cleaning Service	1	MONTH	4/15/2008						
Generate this F	PM work order>									
	<u>_</u>	×								
	Generate	Close								

The user can now select a PM from the pop-up and click on GENERATE to generate a PM this will add the PM data to the Repair Order.

The user can now complete the PM and Work Order as per usual.

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When a PM is generated all ESTIMATES from the procedure associated with the PM are added to the work-order, the PM field becomes Read-Only, the PM Number field Look-Up disappears, the WORK-TYPE Changes to 'PM', the Procedure changes to whatever is specified on the Selected PM, the PROCEDURE field Look-Up disappears, the PROCEDURE field becomes Read-Only, the UNIT NUMBER/Equipment Number field Look-Up disappears and the UNIT NUMBER/Equipment Number field becomes Read-Only.

S.5 Assets

S.5.1 Equipment

The Equipment Module has some major improvements with this release of Web Work. From the inclusion of the Look Up tab to streamlining and improving the way meters work, the Equipment module is better then ever. With new tabs added for greater functionality.

Lookup	Main	Specifications	Hierarchy	Parts List	Meters	History	PM List	Depreciation	Ì
Fauinment	0000	36		GMC Pickur	Truck				

In the Equipment module the Equipment Hierarchy Report has been added. This allows users to get an easier look at Equipment Hierarchies.

S.5.2 Main Tab

Several changes have been made to the main tab. Several fields have been added and several have been removed.

Added to the Main tab are the Hazardous Materials field, which allows the user to note if the Equipment contains any Hazardous Materials, this also prints on the Work Orders for this piece of equipment, the ability to mark the record as a Master Record, the Charge Back and Client Code fields, and the Equipment Address fields. The Main Tab also now has a check mark that shows when an Equipment record is set to inactive.

Removed from the Main Tab are the Meter Reading, Average, Interval, Salvage, Life, and Method Fields. The meter related fields are now accessible through the Meter Reading Tab and the Depreciation related fields can now be found in the Depreciation tab.

When a user updates the Equipment Division, the user is asked if they want to update existing PM's and WO's that are associated with that record.

S.5.3 Specification Tab

The biggest change made to the Specification Tab is that this is no longer where the user creates a Meter for an Equipment Record.

The Specifications Tab is now used solely for Equipment specifications such as Volume, Horsepower and the like.

When adding a specification to the specification tab the only Attribute choices are now Static and Measurement. The Static Attribute would be used for items like colour or voltage while Measurement would be used for the weight or Horsepower.

S.5.4 Parts List Tab

The only change to the Parts list tab is the inclusion of the Issue Unit to both the Edit Part and Add Part screens.

S.5.5 Meters Tab

The Meters Tab is a very powerful addition to the Equipment Module. The new Meter Reading tab gives users much more control over the meters on an Equipment Record as well as introduces Meter Error checking to make sure that information entered into a meter is keeping on track with the appropriate use of the equipment.

At first glance the Meter Tab appear to be the same as in previous versions but the similarity in appearance is all that it shares with previous versions.

Look	up Main	Specific	ations Hierarchy	Parts List Meters	History PM List [Depreciation
Equipm	nent	000036		GMC Pickup Truck	V	
Readin	g Date					'
	Mete	er Name	Unit	Average Reading	Current Reading	Total Reading
	Mete Hours	er Name	Unit Hours	Average Reading	Current Reading 178	Total Reading 178

Reading Date	Meter Reading	Rollover Reading	Meter Name
2/5/2008	178	0	Hours
2/3/2008	162	0	Hours
2/1/2008	147	0	Hours
2/5/2008	75133	0	Odometer
2/3/2008	75102	0	Odometer
2/1/2008	75051	0	Odometer

At the top of the Tab the summary information about the meter is listed. These columns include the Meter Name, Unit, Average Reading, Current Reading and Total Reading. The Average Reading is part of the error checking that is now built into the meters.

The Total Reading is the current Reading plus the Rollover Reading.

Below that the meter readings are now listed with the Rollover Reading. This represents what the meter reading was at the time it rolled over.

S.5.6 Adding A New Meter

To add a new meter to the Equipment Record click New Meter 47 on the bottom right side of the Meter Tab. The Equipment Meter screen opens:

- Enter the Meter Name (example; Odometer)
- Enter the Meter Unit (example; KM)

- "Rollover at": This is the max amount that the physical meter can read.
- "Average Reading and Days": This is part of the Error Checking now available in Web Work.



It helps to think of the Average Reading in terms of a clock. A clock can not have more than 24 hours in one day. So in that sense an equipment meter can't clock up more than 24 hours in one day. Basically this would be set to the maximum value the meter can change in any given time period.

- Fudge Factor: The percentage of the Average Reading the meter reading can be exceeded by. (example: If the average reading is 100 1 Day and the Fudge Factor is 10%, the Meter Reading entered can be no more then 110 more than the previous reading.)
- Select Primary or Secondary Meter. (Note: You can have an unlimited number of meters for each Equipment record)
- Chose whether or not the meter will Reset on the Completion of the work order. I.e.: will the meter return to 0 when the associated work order is completed.
- Click save Interview to save the meter.

	Equipment Meter					
Meter Name			Cumulative Reading 🗌			
Unit						
Rollover At						
Average Reading			In	Days		
Fudge Factor	25		%			
Meter Type	Secondary Meter	~				
Reset On Complete						



If no meter error checking is required simply leave the Average Reading and Days fields empty.

C5.6.1.1.1 Cumulative Meter

Cumulative Meters are new with this version of Web Work. A Cumulative meter is a meter where instead of entering the new total for the meter the user only enters the additional amount to the meter.

Take for instance a meter that counts hours. The meter starts the day with 150 hours. The meter is run for 8 hours. Instead of entering 158 in the next meter reading the user enters only the hours that were used. In this case the user would enter 8.

Creating a Cumulative Meter is the same as creating any other meter. The user simply needs to make sure that there is a check in the Cumulative Reading check box.

Cumulative Reading 🗹

S.5.7 Adding a New Meter Reading

- To add a new Meter Reading to a meter click new on the meter tab. This will open the Equipment Meter Reading screen.
- Choose the Meter Name from the drop down list.
- Enter the date of the Meter Reading.
- Enter the Meter Reading.
- Click save int to save the reading.

000003	
ľ	× _
4/3/2008	
	[[

S.5.8 Creating a Meter Changeout

There are many instances that a meter may need to be Changed Out. An example would be if the meter on a piece of equipment has been replaced.

To Create a Meter Changeout, click Changeout ⁶ in the Meter Tab. The Meter Changeout screen will open.

- Choose the Meter Name from the drop down list
- Enter the date the Changeout occurred in the Changeout Date field.
- Enter the Intial Meter Reading of the new Meter in the Initial Reading on New Meter Field.
- Enter the Meter Reading of the old meter when the Changeout occurred in the Last Reading on Old Meter Field.
- Click save **IT** to save the Meter Changeout.

Meter Changeout				
Equipment Meter Name	000036 Odometer			
Changeout Date	4/10/2008			
Initial Reading on New Meter				
Last Reading on Old Meter				



When a Meter Changeout occurs all Meter related fields in Web Work are updated. Ex. The next due readings on PM's are automatically updated to reflect the reading on the new meter.

S.5.9 <u>Meter Rollover</u>

When setting up a new meter the Meter Rollover value is entered. If a value smaller then the previous meter reading is entered, Web Work prompts the user with a warning.

Wind	dows li	nternet Explorer
?		leter reading is smaller than the current reading. Click OK to keep the reading if the new reading is the result of meter rollover or Cancel to erase the eading and enter again.
		OK Cancel

When the analogs the warning they will be brought back to the Equipment Meter Reading screen where they can either resave the reading or correct it if necessary.

The Meter Tab is updated to reflect the Meter Rollover.

	Meter Name	Unit	Average Reading	Current Reading	Total Reading
~	Hours	Hours	24 / 1	10	210
	Odometer	КМ	1000 / 30	75133	75133

Reading Date	Meter Reading	Rollover Reading	Meter Name
4/10/2008	10	200	Hours
2/5/2008	178	0	Hours
2/3/2008	162	0	Hours
2/1/2008	147	0	Hours
2/5/2008	75133	0	Odometer
2/3/2008	75102	0	Odometer
2/1/2008	75051	0	Odometer

S.5.10 Depreciation Tab

Since the Depreciation data is displayed in the Depreciation Tab it made sense to move the Salvage, Life and Method fields here. The basic functions of running depreciation has not changed.

S.5.11 Equipment Modifications

The following fields must be updated on the Equipment Modification screen (not on the Equipment main screen.) A change to any of these fields will be logged in the Equipment History.

- Location
- Parent
- Status
- Operator
- Data Division

S.5.12 When making a Modification or Adding a New Equipment record, these Rules apply

Operator:

Can change to any valid Employee, Requester or Vendor code.

Status:

Can change to any valid Status code except:

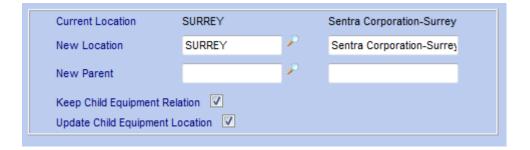
- Cannot change from ONSHELF this must be done by Issuing from a Storeroom
- Cannot change to ONSHELF this must be done by Returning to a Storeroom

Location, Parent, Data Division:

The following rules apply to changing any of these fields.

- Equipment's Division must be the same as or a Sub-Division of it's Location's Division
- Equipment's Division must be the same as or a Sub-Division of it's Parents Division
- If the Equipment's Division is NULL, then it can go anywhere (the previous two rules do not apply)

S.5.13 Changing Location or Parent



If "Keep Child Equipment Relation" is unchecked, then the relationship to Child Equipment will be removed. In this case Web Work will blank the Parent Equipment field on the Children Equipment. No other updates are done to Children.

If "Keep Child Equipment Relation" is checked, then all Children Equipment will keep the Parent Equipment record reference.

- And if "Update Child Equipment Location" is unchecked, then Child Equipment's Locations will not be updated BUT the rules for changing Location, Parent, Data Division must be followed and will be enforced.
- Or if "Update Child Equipment Location" is checked, then Child Equipment's Locations will be updated and if the Equipment Division changes then the Child Equipment and associated records (including Procedures, PMs, Work Orders) Divisions will be updated except for records already in a Sub-Division or that have their Division set to NULL.

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S.5.14 Changing Data Division

Current, EQ Division	
New Division	₽

C

If the Division is changed then all Children Equipment and associated records (including Procedures, PMs, Work Orders) will be updated to the new Division except records that have a NULL Division or are already in a Sub-Division.

S.5.15 Route Reading

Route Readings in Web Work are now more user friendly then ever. Users now have the ability to rename existing routes and have the same equipment on multiple different routes.

The Meter Error Checking that has been introduced in the Equipment module is also taken advantage of in the Route Readings so data entered here will be more accurate then before.

One of the biggest changes to the Route Readings is the ability for the user to update the Meter Reading Date for all the Equipment on the Route at the same time.

Enter Route Readings : BLDG 1							
				3/20/2008)		
Equipment	Meter Name	Meter Date	Prev Reading	Meter Date	New Reading		
000002	Voltage		111	3/20/2008			
000001	Point1		1	3/20/2008			
EQUIP 2	Hour	2/26/2008	21	3/20/2008			
EQUIP 1	Meter 2	2/23/2008	80	3/20/2008			

To update all the Meter Dates at the same time, simply highlight the date in the Date field at the top of the screen and type in the date that the meter readings were collected. Click Tab and all the Meter Date fields will update with that new date.

S.5.16 Changes to the Location Module

Besides the addition of the Control Panel and the Lookup Tab, the Location module now also has the added security of the ability to mark a record as Master limiting the user that can make changes to these records.

The Contact1, Contact2, and Contact3 fields have been removed to make the Location module more streamlined and easier to report on in Report Writer.

S.5.17 Location Modifications

Changes to a Location's Parent, Status and Division are now done using the new Location Modification feature. The new feature can be accessed as shown below from the Location – Operations menu.

Operations Resources Too	bls Help	Community Module
New Location		
Location Query	nent List Location History	
Modify Location		
Duplicate Location	Fort Good Hope	
Delete Location		
Print Selected Location		
Search Specifications		
Contact		

	Location Modifica	tions
Location	302	Fort Good Hope
Modify Date	4/4/2008	
New Parent	· · ·	
Current Status		
New Status	_	P
Current LOC Division	1.3.1	
New Division	1.3.1	2
	Save Close	

S.5.18 RULES:

When a Location's Division is changed or a Location's Parent is changed:

The program will check to see if the Location's new Division will be the same or a Sub-Division of it's Parent's Division.

If no, then the change is not allowed.

If yes, a message box will pop up telling the user that all Child Location's and associated Equipment, Procedures, PMs and Work Orders will be updated to the new Division. The user can choose continue or abort.

- If the user aborts, the screen closes and nothing happens.
- If the user continues, the Location's Division, all Child Location's and associated Equipment, Procedures, PMs and Work Orders will be updated to the new Division. A history record is written and can be seen on the new Location History tab.

The following rules apply:

- If a Child Location and associated records Division are the same or a Sub-Division of the Location's old Division, then all Child Locations and associated record's Divisions will be updated to the new Division (i.e. they will follow the Parent Location's move to the new Division);
- If a Child Location and associated record's Division is already in a subdivision of the new Division or its Division is NULL, the Division will remain the same.

	esources Tools	Coi	nmunity Module		
Community Modify Date	100	Fort S		Y	
Modify Date	Status Old	l/New	Parent Old/New	Div	ision Old/New
4/4/2008		(1.3.2.1	1.2
4/4/2008				1.2	1.3.2.1

The changes can now be viewed on the History screen as seen here:



For more information on the Control Panel, Lookup Tab and Master Records please see the entries under Global Changes.

S.5.19 Changes to the Labour Module

When looking at the Labour Module the most evident changes are the addition of the Lookup Tab and the addition of the Control Panel, but there are some changes that are less pronounced but just as important.

Employee ID	JUMMY.CHOO		Last Name	Choo					
Title			First Name	Jimmy					
Inactive			Employee	Yes	0 N	lo			
Address 1	123 Main St.								
City	Vancouver		State	BC			Country	Canada	
Zip	V5S 4P7		Phone				Fax		
URL									
Email	jimmy.choo@myema	iil.com				0	Email	✓	
Account		۶					Notification		
Craft	ELEV-MGR	<i>"</i>	Hourly Rate	43			Hire Date		
Work Location	VANCOUVER-HQ	₽	Department			2	Manager		
lab1			lab2				lab3		
lab4									

S.5.20 Inactive Check Box

The Inactive Box is a way of archiving a past Labour record without having to delete it. When a labour record is deleted any history that is associated with it also is deleted.

By making a labour record inactive all the Historical data is retained, the record will no longer show in searches in the Labour module and if that record had a User Log in, that account will be suspended.

To set a record Inactive put a checkmark in the box and click save in at the bottom of the page.

	ain Additional Info Equ
Employee ID	NORMAN.FELD
Title	
Inactive	
·	

S.5.21 Group Field

The Group Field located in the lower right hand section of the screen has been added to simplify the administration of users. If the Labour Record is a member of a group in the Admin module, this field will show that group.

S.5.22 Account Field

Just as in the Equipment module the Account field identifies the account that will be charged for all costs associated with this record.

l	Email	norman.feld@myemail.com	
	Account	۶	
l	Craft	ELF	Hourly
	Work Location		Depart

S.6 Inventory

S.6.1 Inventory

The changes to the Inventory module are mostly located on the Main Tab with the exception of the Lookup Tab and changes to the Issuing of reserved items.

S.6.2 Main Tab

Lookup Mair	Specifications Wh	ere Used V	endors	Manufacturer S	how Open PO	0	
ltemNo.	FEDEX-2	FedEx In	ternatio	nal Priority			
Short Descriptio	n				Serialized	O Yes	No
Category	Shipping 🥕	Issue Unit		EA	Stock Item	Yes	O No
Primary Vendor	FEDEX 🥕	Vendor P	art #	123	Pri Manufact	urer BRIGGS	; 🧈
SubType0	P	SubType1		J	SubType2		
SubTyne3	~ ~	ABC Ana	ysis		Markup Rate	0	%
Manufac Part#	123-ABC	Warranty	(Months)	0	Division		
	Storeroom	Aisle Rov	v Bin	Vendor	Avg Price	Last Price	Qty Available
ISSUE ITEM	MASTER			FEDEX	\$0.00	\$0.00	0
						TOTAL	0

The changes to the Main Tab of the Inventory module include the addition of the Primary Manufacturer Part Number field, the Warranty field and most notably the addition of Data Division to individual inventory items. The addition of the Data Division to the inventory module allows for individual division to manage only their own inventory items instead of all inventory in the database.

S.6.3 Issuing Reserved Items

Now when issuing items that have been reserved through either the Work Order module or the Item Request module, the user can specify the Transaction date of the issue:

St	oreroom	MASTER ROOM	₽	Work Order	~	000070		2	Y
Pi	cked Up By		- P	Delivery Address				<i>P</i>	
	\frown								
Line #	Date	ltem #		Description		Reserved Qty	Stock Level	Qty To Issue	Serialized
1	4/3/2008	00006	Filters, 20m	m, Micronic		2	17		
2	4/3/2008	CL00239	SPM Rec S	creen		2	15		
	\smile								

To change the Transaction date:

- Highlight the Date for the Line # that you would like to change.
- Enter the Date that you would like the Issue to be listed in the record (mm/dd/yyyy).
- Click Tab to validate.

S.6.4 Storeroom

Since the same parts can come from different Vendors and have different Vendor ID numbers, the Manufacturer Part Number has been added to the Store Room screen. This will make it simpler for users to make sure they are looking at the right Inventory item. Of course this field is also now in the Inventory module.

				Storeroom				
Storeroom	MASTER ROOM	1						
ltemNo.	000006		Description	Filters, 20mm				
Aisle			Row		1	Bin		
		1 0						
Vendor	VENDOR 1	~	Vendor Part #			Account		
Manufacturer	BRIGGS	\sim	Manufac Part#	3AC5-9				
Stock Level	17	57	Last Price	15		Purchase Unit	BX	_
Reserved	0	4	Average Price	15		Conversion	6	_
Quantity Qty Available	·		Quoted Price		Heigh	Issue Unit		_
Quantity On	17	r i i i i i i i i i i i i i i i i i i i	addied Price	15		issue onic	EA	
Order	0							
Reorder Method	Min / Max	() F	OQ Reorder Poin	t				
		<u> </u>						
Max Stock / EOQ	25			Min Stock / Reorder Point		20		
Mode: edit								
and dor out								
				è 📕 🗙 👘				
			Dek	ete Save Close				

Another important change to note for the Storeroom Module is that the Tools Menu item "**Adjust Stock Level**" is now "**Inventory Count**." It is important to note that although the name has changed the functionality remains the same.

Reports	
Links	
Inventory Count	

S.7 Vendor

The Vendor Module, just like many of the other modules, has gained the Lookup Tab as well as two new tabs, the Services Tab and the Branches Tab.

S.7.1 Changes to Main Tab

The most important change to the Main Tab of the Vendor Module is the ability to add a Data Division to the Vendors. This simple security measure makes sure that users can only see their own Vendors and create PO's from them.

The other change to the Main tab is the addition of the Parent Company field. Adding a Parent Company to a Vendor also adds a new location to the Branches Tab. This works in a similar way to the equipment and location hierarchy.

S.7.2 Changes to Vendor Items Tab

In order to track the prices of items from Vendors, the Last Price field has been added to the Edit Vendor Item Screen.

The currency of the item has also been added just to the right of the Price fields.

Vendor	000015	
ItemNo.	SR101	
Vendor Part #	0001	
Purchase Unit	HR	- P
Conversion	1	
Quoted Price (per Purchase Unit)	50.00	CND
Last Price (per Purchase Unit)	50.00	CND
Discount	0	%

S.7.3 Services Tab

The Services Tab is a brand new addition to the Vendor module. The Service Tab allows users to issue a service to a Work Order just like they would with Labour or Material.

Lookup Main \	/endor Items Services Contacts Bra	nches		
Vendor ID	000002			
Vendor Name	Hampton Brothers			
Service Code	Description	Unit	Last Price	Quoted Price
SVC001	Tire Repair	EA	\$49.50	\$49.50

To add a new Service to a Vendor click New 🗣 at the bottom of the Services Tab. The New Service window will open.

₽

- Fill in the service code.
- Add a description for the service.
- Enter a Vendor Part Number if one exists.
- Enter a Quoted Price and a Last Price.
- Click save **m** and the service entry is complete.

The service can now be added to a Work Order, PM or Procedure in the Services Tab.

S.7.4 Branches Tab

Many Vendors can have different locations. With the addition of the Branches Tab the user can now keep track of all the locations for one Vendor.

Lookup Main Ve	ndor Items Services Conta	cts Branches		
Vendor ID 000012	н	AVC Repair		
Vendor ID	Vendor Name	Vendor Category	City	Province
000012	HAVC Repair		New York	NY
000015	Maytag Corp		Seattle	WA

To add a new branch to a Vendor, simply add another location using Parent Company field on the Main Screen.

S.8 Purchasing

S.8.1 Purchasing

The changes to the Purchasing Module start with the inclusion of the Look Up tab, as well as a major change to the Line Item tab that allows the user to create a PO for a service.

S.8.2 Main Tab

The Main Tab now benefits from two new fields, the Priority Field and the Manager Field. Both these new fields allow for better tracking of PO's. The biggest change to the PO Main tab is the ability to choose which Branch of a Vendor the PO is to be created for.

When a Vendor has multiple branches the user is prompted to select a branch when adding the Vendor to the PO.

To create a PO for a specific branch of a Vendor:

- Click the lookup *P* next to the Vendor field.
- The Vendor Pick List screen will open.
- Choose the Main Vendor for the order.
- If there are multiple Branches for this Vendor the Select a Vendor screen will open.
- Select the Branch for the PO and the Select a Vendor screen will close and add that Vendor to the PO.

	Select	t a Vendor		
Code	Name	State/Provin	ce City	
000012	HAVC Repair NY	NY	New York	/
000015	HAVC Repair Seattle	WA	Seattle	/

S.8.3 Line Items Tab

The look of the Line Items tab has not change except for the introduction of a Service Column and the way that the currency is displayed.

Line Number	ltemNo./Service Code	tom Decemption	Received Quantity		Price	Tax1	Tax2	Line Total	Service
1	HB-0001	A to Z inspection Service	0	1	100.00	4.00	5.00	109.00	+
2	000008	Wireless Router	0	10	29.99	12.00	15.00	326.90	
			Subtotal	CI	VD 399.90	1690	20.00	435.90	\smile

The Service Column lets the user know at a glance if the Line item is Service.

The Currency Code for the PO currency is shown in the Subtotal Line. This makes it easy to distinguish what currency the PO is in.

S.8.4 Adding a Service to a PO

To add a Service to a PO:

- Click the New Service
 in the Line Item tab
- The PO Service Screen will open

Line Number		1		
-			Vendor	SONY CORP.
Service Code		2	Vendor Part #	
escription				
Jnit 🛛		₽	Rate	
WO Number		2 2	Subtotal	
Account] ?	Order Quantity	
quipment		*	PST	
Request #			GST	
Currency	YEN		Line Total	1

- If the Service code is known, type the code into the Service Code field. If it is not known, click P beside the Service Code field.
- The Services search screen for the PO vendor will open.

	Servi	ices (Vendor:000016)
Vnedor	000016	Y \$
Service Code		
Description		
Vendor	Code	Description
000016	HB-0001	A to Z inspection Service

If any information about the service is known, such as the description, it can be entered into the search

fields. Click the filter **Y** to filter the services. To see all Services, click the filter **Y** icon without entering any search criteria.

• Select the Service from the list by clicking on it. Web Work will return to the PO Service screen.

Line Number			Vendor	000016	
Service Code	HB-0001	₽	Vendor Part #		
Description	A to Z inspection	Service			
Unit	PKG	<u> </u>	Rate	100	
Account	Work Order MAINT	₽	Order Quantity	1	
Account				1 100	
Account WO Number	MAINT	₽	Order Quantity		
Purchase for Account WO Number Equipment Request #	MAINT		Order Quantity Subtotal	100	

- The Description, unit, and rate fields will be auto filled with information from the service.
- Enter the Order Quantity and the Purchase For information and click save II.
- To add a Service that is not listed in the Vendor Services Tab simply fill in the Description, Unit and Rate for the service. Fill in the Purchase For information and click save

The PO Service screen also has the ability to Receive the Service without having to go to the receiving module.



- To Receive the Service from the PO Service screen click Receive
- The Service will be added to the PO and marked as Received. The service will also be added to the Actual Service tab of the Work Order if the Service is being ordered for a WO.

The PO Services Screen also makes use of the new Currency system. The currency of the Vendor is displayed in the Currency field.

WO NUMBER	000070	
Equipment		2
Request#		
Currency	CND	

S.8.5 Adding a Physical Item

Adding a Physical Item to a PO is now very much like adding a Service to a PO.

• To add a Physical Item to a PO click New Physical Item *** and the PO Line Item screen will open.

		PO Line	e Item	
Line Number		1	Vendor	000016
ltemNo.		₽	Inventory Item	
Item Description				
Serialized			Vendor Part #	
Purchase Unit		₽	Conversion	
Issue Unit		₽	Price (per Purchase Unit)	
Account Storeroom WO Number Equipment Request #	oreroom O Work Order MASTER	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Order Quantity (Purchase Unit) Subtotal Tax1 Tax2 Line Total	
			Currency	CND
		Receive Sa	ve Close	

The top section of the PO Line Item screen has not changed; however, the lower half of the screen is different.

- The default Storeroom is now automatically entered in the Storeroom field.
- Just like the Service screen the PO Line Item screen has the currency code entered into the Currency field.
- The PO Line Item screen can now receive the item directly.
- To receive the item click Receive

S.8.6 Creating a PO for New Equipment

Web Work can now create a PO for a new Piece of Equipment. When the new Equipment is received the user is prompted to enter the appropriate information for that piece of equipment.

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- To create a PO for a New Piece of equipment the item cannot be listed as an inventory item.
- Enter an Item Description for the new Equipment. This will be the same description that the Equipment module will use once the item has been received.
- Enter a Purchase Unit, Conversion, Issue Unit and Price.
- In the Purchase For section, choose New Equipment and click 🗾 save.



When creating a PO using the New Equipment record only the Account Code can be added to the Purchase for Information. When Creating a PO for New Equipment, the PO must be Received in the Receiving Module.

S.8.7 Auto Generate PO

When Auto Generating a PO, Web Work now lists the quantity that the PO will be created for.

	Storeroom	Item #	Description	Vendor	Stock	Min Leve	Reorder Qty
~	MASTER ROOM	FOR PO	tst for po auto generate	000002	0	5	10
~	MASTER ROOM	ITEM 001	Serialized 001	000002	1	1	9
~	MASTER ROOM	000006	Filters, 20mm, Micronic	VENDOR 1	16	1	25

S.8.8 <u>Receiving</u>

Outstanding	Order Filter					
PO Number					∇	+
Vendor		₽	Department	- P		Lo.

The Receiving module now allows the user to filter the PO's by Department. When receiving serialized equipment from a PO for the first time, Web Work enters a record in the Equipment History to record the creation of the Equipment record.

When receiving items from a PO, Web Work now has the ability to print a Barcode for the item right away.

• To print the barcode, place a checkmark in the Print Barcode

box in the Order Receiving screen and click

• A new screen will open with the barcode that is ready for printing.

Account	
Receipt Document	
Print Barcode)

S.8.9 <u>Receiving a New Equipment PO</u>

When Receiving a PO for a New Equipment, the Receipt is done in two parts.

- The first step is to receive the PO like any other PO
- Once the Equipment has been received, the Receive New Equipment screen opens.

Description	New Truck				
Location		₽	Room		
Location Description					
Status		₽	Account		₽
ЕQ Туре		~	Model		₽
Department	DEP 1		Use Equipment	Auto-Number	
Data Division		~			

- Fill in any of the needed information.
 - When the Location Field is populated the Location Description will auto populate with the appropriate information.
- By selecting the Use Equipment Auto-Number check box the new equipment will be automatically
 assigned a new equipment number based on the system settings.
 - Enter an equipment number in the Equipment # field to enter a custom equipment number.

Click Receive to receive the new equipment into the Equipment module.

S.8.10 Item Request

The Item Request module now benefits from the Lookup Tab and the ability to Email the request from within the module.

S.8.11 Main Tab

Both the **Priority** and the **Department** fields have been added to the Main Tab, making it easier to keep track of Requests.

Required Date					
Department	MAINT	₽	Priority	1	
Close Date				,	

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S.8.12 Item List Tab

The Item List tab is where the biggest changes have been made to this module. The user now has the ability to create a request not just for an item but also for a service. To keep easy track of which items on the list are for a physical item and which are for a service, the **Is Service** column has been added. This denotes whether or not the list item is a service or an item.

Request # 000012		012	Request for Service and Item	Request for Service and Item						
Status	WTA	APPR				~				
Line #	Category	Item #	Description	lss Qty	Req Qty	Price	Total	ls Service		
Line # 1	Category	Item # 000006	Description Filters, 20mm	lss Qty 0	-		Total \$32.70	Service		

S.8.13 Adding a Service to an Item Request

Adding a Service to an Item Request is quite similar to adding an item.

- To add a service, click the new button in the lower right corner of the request screen.
- Once that is clicked a selection menu will appear.
- Chose Service and the New Service screen will open.



		New	Service	
Line Number			Vendor	
Service Code		₽	Category	P
Description				
Unit		2	Account	₽
Employee		2		
Rate			Request Qty	
Received Qty	0	-	Tax1	
Status	OPEN	_	Tax2	
			TotalCost	
			e Close	

- If the Service Code is known, enter it into the Service Code field and click Tab to validate the data.
- If the Service Code is not known, click on the P Lookup icon to bring up the Services screen.
- Fill in as much known information into the search fields at the top of the screen and click the filter and the list of services that match that criteria will fill the list.

	Servi	ces (Vendor:000002)
Vnedor Service Code Description	000002	▼
Vendor	Code	Description
000002	HB-0001	A to Z inspection Service
000002	INTERNATIONAL 1	International overnight, before 10am
000002	SR001	HAVC Cleaing and Maintenance
000002	SVC001	Tire Repair

• Choose the service that you wish to add to the Item Request. The Services screen will close and the New Services screen will populate with the information for that service.

ine Number.			Vendor	000015	
ervice Code	SR001	2	Category		Jan Star
escription	HAVC Cleaing and Mainte	enance			
Jnit	HR	₽	Account		- P
Employee		2			
Rate	50	-	Request Qty		
Received Qty	0	- -	Tax1		
Status	OPEN	-	Tax2		
			TotalCost		

- Fill in the Request Qty and click tab. The Tax1, Tax2 and Total Cost fields will calculate for you.
- Click save 🛃 and adding a new service to the request is complete.

S.8.14 Emailing the Item Request

Web Work now has the ability to Email the Item Request from within the Item Request module. To Email the Item Request:

Click on the menu and choose Email
 Tools
 menu and choose Email
 Tools

	Send I	Email
Seperate m	ultiple addresses with a semi colon	
То	tero@tero.ca	
CC		
From	WebWork Automated Message	Copy Administrator
Subject	Item Request:000012	
Message	Item Requester #: 000012 Request for Service a Status: WTAPPR Required Date: Open Date: 3/26/2008 Ship to:	and Item
	Send	Close

- The "To" field will always default to the email address entered in the labour module for the Requester listed on the Item Request. This email address can be changed to suit the user's needs.
- The message can be edited to include or exclude any information that may need to be edited.
- Once the message and recipients are set click send \checkmark and the email will be sent.

S.9 Admin

S.9.1 <u>Admin</u>

The Admin module now has links to users Security Permissions and Passwords right on the main Admin Page.

ip: Admin all Unselect all	🗎 Security/Pe	ermissions 🔑Pa	ssword
User Id	Name	Location	
ксн	Chang, Kevin		9
MARK	Sherling, Mark		9
TERO	Tero, Admin		1 🤭 🥖

To reset a Users Password click Password \gg in the users' row and the Change Password screen will open. To update a users security and permission settings, click Security $\frac{1}{2}$ in the users' row. This will open the Configure System Security screen for this user.

S.9.2 System Security Setup

When setting System Security Setup for the Equipment, Location, Procedure, Vendor and Storeroom modules, users can be given permission to edit Master Records.



For more information on Master Records please see section **C.2.2**.

S.9.3 System Default Setup

Work Request	
Show Location on Request	YES 💌
Show Remarks on Request	YES 💌
View Others Requests	NO 💌

- The Work Request section no longer has Requester Can Change Password.
- Passwords can now only be changed by Admins.

Equipment	
Use Auto-Number On New Equipment Record	YES V
Use Hierarchy on Equipment Subtypes	YES V
Sort Equipment in Numeric Order	NO 💌
Update PM/Procedure Priority when Equipment Priority updated	YES V
Update PM/Procedure Department when Equipment Department updated	YES 💌
Update PM/Procedure Account when Equipment Account updated	YES 💌
Update PM/Procedure Division when Equipment Division updated	YES 💌

• PM/Procedure Priority when Equipment Priority is Updated

- When the Priority field of an equipment record is changed, the user has the ability to choose if the Priority on PMs and Procedures of the equipment record are to be updated accordingly.
- PM/Procedure Department when Equipment Department is Updated
- When the Department field of an equipment record is changed, the user has the ability to choose if the Department on PMs and Procedures of the equipment record are to be updated accordingly.
- PM/Procedure Account when Equipment Account is Updated
- When the Account field of an equipment record is changed, the user has the ability to choose if the Account on PMs and Procedures of the equipment record are to be updated accordingly.
- Update PM/Procedure Division when Equipment Division is Updated
- When the Division field of an equipment record is changed, the user has the ability to choose if the Division on PMs and Procedures of the equipment record are to be updated accordingly.

Inventory Issue	
Inventory Issue Price	Average Price
Inventory Purchase Price	Quoted Price
Inventory Reorder Method	EOQ
Issue Reserved Items Only	NO 💌
Default Storeroom	MASTER
Use Auto-Number On New Inventory Item	NO 💌
Sort Item in Numeric Order	NO 💌
Warranty On Inventory Items	YES 💌

NO 🗸

• Added Warranty On Inventory

This is to indicate if the warranty on inventory items is applied. The system will check if the item is under warranty when the item is issued the second time to the same piece of equipment. If the interval between the two issues falls under the warranty period, a message will alert the user that the item is under warranty.

Auto Approve Projects

•

If yes is, selected all new projects will be automatically approved when created. If no is selected, new projects must be approved.

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Projects

Auto Approve Project

System		
Tax 1 Rate	4	%
Tax 2 Rate	5	%
Decimal Place on Labour Cost	2	
Decimal Place on Material Cost	2	
Session Timeout	30]
Dept/Division Separator	YES 🗸	
Use Data Division on Inventory	YES 🕶	
Email Server	katana.tero.ca	
Company Email	support@tero.ca	
Link Document URL		

- Use Data Division on Inventory
 - Determines whether or not Data Divisions are used on Inventory items.

S.9.4 Custom Screen Setup

Web Work now allows the user to set custom screen settings for individual module screens. This allows the users to select whether a field is visible or not and can also make a field mandatory.

To access the Custom Screen setup the user must have access to the Admin Module.

Click Operations and then Custom Screen Set Up. The Custom Screen Setup Screen will open.

Select the Module that requires modification from the drop down list.

Select the module	Equipment	~
Field Name	Hide Field	Mandat

This will list all the fields that are available for editing for that module.

Equipment Screen Set Up						
Select the module	Equipment	v				
Field Name	Hide Field	Mandatory	Mandatory Message			
Account		~	Please fill in the Account Code			
Address1						
Address2						
СВ						
Client Code						

By placing a check mark in either the Hide Field box or the Mandatory box, the field can be hidden or made Mandatory.

When making the field mandatory the user then has the option to enter a Mandatory Message that will alert the user if the field is not entered when creating a new record.

When a field is mark as Mandatory the field colour is turned to grey to		Serial Number	senar number	
match the other mandatory fields.		Account		₽
	=	Denartment		₽

Once all the required changes have been made, click save **I** to save the changes.

S.9.5 Action Log

The Action Log is a report designed to let administrators see what each user is doing in Web Work. To

access the Action Log the user must be in the Admin Module. Click **Tools** and then Action Log Action Log Screen will open.

E			Action Log							
Employee ID		₽			V					
Start Date 3/2	29/2008	Er Er	d Date 4/8/2008		T Y					
Employee ID	Date		Action	Success	Remark					

If information is required for a specific user, enter the Employee ID in the Employee ID field. If the Employee ID is not known, click 🎤 and the Employee search screen will open. Select the user ID for the desired user and it will Auto Fill the Employee ID field.

Enter the Date Range by entering in the Start Date and the End Date and click Filter This will populate the report.

If no specific user is required, leave the Employee ID field blank and the report will return information for all Employees.

Action Log						
Employee ID		S.		V		
Start Date	3/29/2008	End Date 4/8/2008				
Employee ID	Date	Action	Success	Remark		
DBA	3/31/2008 10:07:45	LOGIN	Yes	<u>^</u>		
DBA	3/31/2008 10:14:52	LOGIN	Yes	1		
DBA	3/31/2008 10:35:58	LOGIN	Yes			
DBA	3/31/2008 10:59:20	LOGIN	Yes			
DBA	3/31/2008 11:07:59	LOGIN	Yes			
DBA	3/31/2008 11:24:44	LOGIN	Yes			
DBA	3/31/2008 11:30:12	UPDATE Equipment 000023	Yes			
DBA	3/31/2008 11:55:26	LOGIN	Yes			
DBA	3/31/2008 11:59:14	LOGIN	Yes			
DBA	3/31/2008 12:00:49	INSERT Equipment 000029	Yes			
DBA	3/31/2008 12:01:17	INSERT Equipment 000030	Yes			
DBA	3/31/2008 12:11:57	LOGIN	Yes			

S.9.6 Changes to the Tools Menu

The Tool Menu in the Admin module has two new very useful features, Align Quantity on Order and, Align Reserved Quantities.

S.9.7 Align Quantity on Order

Align Quantity on Order is used when there is a discrepancy between the Reported quantity on Order and the Actual Quantity on Order. This tool will reset the Quantity on Order back to the appropriate levels.

To access Align Quantity on Order, click **Tools** and then Align Quantity on Order. The Align Inventory Quantity on Order to PO Order Quantity screen will open.

Align Inventory Quantity on Order to PO Order Quantity						
Storeroom	Item	Reported Qty	Order Qty			
CENTRAL	4	0	-5			
CENTRAL	5	43	63			

This screen reports back to the User, Storeroom, Item Number, Reported Quantity on Order and Actual Order Quantity.

By clicking OK Veb Work will adjust the Reported Quantity to the Actual Order Quantity.

S.9.8 Align Reserved Quantities

Align Reserved Quantities functions in much the same way as Align Quantity on order but is used when the Reported Reserved Quantity and the Actual Reserved Quantity differ.

To access the Align Reserved Quantities function, click **Tools** and then Align Reserves Quantity. This will open the Align Reserves Quantity screen.

To Align the Reserved Quantity, click OK 🗸 and Web Work will	Align Reserves Quantity				
fix the discrepancies.	Storeroom	Item	Reported Reserves	Actual Reserves	

S.9.9 Reports

Two new Reports have been added to the Admin Reports. The Fund Recovery Report (Reprint) and the Equipment Hierarchy Report.

The Fund Recovery Report (Reprint) allows the user to reprint the report that was previously locked by running the Fund Recovery Report that is in the Equipment module.

The Equipment Hierarchy Report is a simple report that shows the Parent/Child relationship of equipment in the Equipment Module.

S.9.10 Report Writer

Report Writer now allows users to sort the reports by Report Owner Name, Report Title or Alphabetically by module. To change the way the reports are sorted simply click the header or the column to sort by. I.e.: if sorting by Report Owner name is desired, click Owner at the top of the Owner Column.

Report Writer							
Report Title	Owner	D plicate	Edit	Delete 🖍			
ABC Analysis Report	MARK	E	1	Î			
ABC Inventory Listing	MARK	<u>a</u>	1	1			
Asset Costing	TERO	<u></u>	1	İ			

S.9.11 Run Time Filters

Reports built in the Report Writer can now be edited to run for specific criteria, at the time of running the report, without every user having permission to change the report.

To use Run Time Filters on a report, simply create the report as normal. For the criteria that the user needs to be able to specify, place a check in the check box of the Run Time column.

When there is a check in the Runtime checkbox the user will be prompted to select criteria for that item every time the report is run.

Align	Total	Group	Visible	Delete	RunTime
LEFT	NONE	Y	N	Î	 Image: A start of the start of
RIGHT	SUM	N	Y	Î	
RIGHT	SUM	N	Y	Î	

When a user runs the report the Report Filter screen will open. The user will be prompted to enter the appropriate criteria.

Once the criteria is entered, click Print

to run the report. The report will open in another window.

User editable filters for report Actual Costs vs Estimated Costs					
Label Column Criteria Set					
WO Number	WoNum	= 000077	= 🖌 000077		
If you select Between, insert two values separated by a comma. If you select IN, separate each value with a comma. If you select LIKE or NOT LIKE, use % as wild card character.					

S.9.12 New Total Column

Three new functions have been added to Report Writers Totaling ability. In addition to Count and Sum, users can now use Max, Min and AVG.

C9.12.1.1.1 <u>Max</u>

The Max function finds the largest value and only returns data based on that reading. Example: If the user selects Max on a Date Field it will return the most current date.

C9.12.1.1.2 Min

The Min function finds the smallest value and only returns data based on that reading. Example: If the user selects Min on a Date Field it will return the oldest date.

C9.12.1.1.3 <u>AVG</u>

The AVG function finds the average value for the column. It sums all the values in the column and then divides by the total number of entries in the column.

S.9.13 Report Graphs

Report Writer can now add graphs to reports. When a graph is created with a report the report will print as normal with the graph at the bottom of the report. The user has the option of putting that graph on the Web Work Dashboard.

When adding a graph to a report the simpler the report, the better the outcome the graph will be. It will help to have a visual of what the graph should look like before starting to create the report.

÷	Align	Total	Gro
÷	LEFT	AVG	٢
÷	RIGHT	MIN	N
÷	RIGHT	MAX	N

/ (14/40/0/10	o mor ong	
Summary Report	Chart Type	Column
Max Value	Min	No Chart
		Column
Module	Workorder	Bar
		Line
Tables	Accounts	Stacked Column
Hold down Ctrl key	Autokey	Pie Chart

Report Writer can create five different types of graphs; Column, Line, Bar, Stacked Column and Pie Charts.

Select the type of chart from the Chart Type dropdown menu.

The first Criteria chosen for the report will always be the Vertical Axis and the second the Horizontal Axis.

S.10 Project Management

With the exception of the addition of the Status History Tab all the changes to the Project Module have been made to the Main Tab.

S.10.1 Main Tab

The Project Management module now has the Status History tab so the Modify Date field has been removed from the main screen.

With the addition of the Project Type field users now have the ability to specify the Type of a Project just as they can for Work Orders.

To add a Phase to a Project, the user now simply needs to click Lookup and a new phase will be added to the project. This opens the same "Add Phase" window as clicking on Operations and then Add Phase to Project

The largest changes come from the lower section of the Project Management screen.

Order	Phase	Description	Start Date	End Date	% Com	% Complete		% Complete		lget	Wo Oro	
1	1	Phase 1	3/1/2008	3/31/2008	5%	5%		00.00		1		
	Est Cost: \$163.50			Act Cost:\$16.35								
WO#	WO Type	Description	Status	Craft	Priority		Target Targe Date Da					
000012	RM	Test Work Request	APPR		2					Î		

This section of the screen is much more detailed than in previous versions of Web Work. You can now see at a glance the Work Order Number and the Estimated and Actual costs of the Project.

The Estimated and Actual costs are calculated based on the Actuals and Estimates added to Work Orders in the project.

The Columns now also display the Status and Priority assigned to the Work Orders.

S.10.2 Adding a Work Order

Users can now add a Work Order to a Project in two ways.

By clicking Lookup 🕌 the user can add a Work Order that has already been created. By pressing Lookup 📕 the Work Order selection screen will open.

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		Select a Work Order	
WO Number			7
Request			
WOType	RM		
WO Num	nber	Request	
000000		test2	^
000003		test	
000017		New WO 1	_
000027		Change Log Testing	
000053		test	-μ
000059		For equipment 000029	_
000061		Crat new repair order for equipment 000030	_
000062			_
000063		MArks work Materials	_
000064		test	_
000068			

Users can filter the Work Orders to list by entering a WO Number, Request or WO Type.

When the user clicks Filter , Work Orders that match the specified Criteria will be listed.

To retrieve and add the Work Orders to the project put a check mark in the check box next to the Work Order number.

Once all Work Orders have been selected click save to attach the Work Orders to the Project.

Users can also create a new Work Order directly from the Project module.

To create a New Work Order from the Project module click Add New

When a New Work Order is created in this method the Project field is automatically populated with the Project ID.

Once the Work Order has been completed, simply click Return to Project $\sqrt[6]{2}$ next to the Project ID field to return to the Project module. This $\sqrt[6]{2}$ icon is a direct link from any Work Order that has a Project ID entered.

Baration (time)	I		•	ID
Project ID 絭	000000	₽	Р	

S.11 Document Management Module

The Document Management module consists of two sub modules:

The Folder module is where Folders are created and documents are tracked to create an electronic file cabinet system. A Folder consists of a set of documents and a document consists of different types of media (photo, contracts, manuals, etc.).

The Document module is used to track different types of documentation and relate the documents to folders and their corresponding equipment records.

This section describes how to use the Folder and Document modules together for Document Management.

S.11.1 Overview of the Folder Module

The Folder module is used to setup and query folders as well as documents within individual folders.

Click on Doc Mgmt from the Side Menu Bar Module List on the left hand side of the screen to access the Folder and Document modules.

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

The Module Options Menu at the top of the screen drop down menus for features within the Folder 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.

The Folder records will contain the document references just like a filing cabinet. In order to relate multiple documents to one Folder, you should create a Folder first and then the Document second. By entering the equipment id or location, you can group common documents into folders for easy tracking and record maintenance.

First it will be explain the procedures to create a Folder, then a Document, leading to a relationship between them.

S.11.2 Adding New Folder Records

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

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

OR

- Click on the New 📫 icon at the lower right corner of the screen.
- Enter details in the fields noting that required fields are shaded blue and all others are optional fields. Required fields are: Equipment ID, File Descriptor, and File Letter. The Document ID will auto populate and is a required field.

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- Click on the save icon at the bottom right hand side of the screen to save the Folder Record.
- Once you save the new folder, you will then be in edit mode where you can edit and resave the folder record.

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

S.11.3 Adding a Document to a Folder

A Folder can consist of one or more Documents. On the right side of the document record, there are two buttons: and known as the "Add Document" button and "New Document" button, respectively.

To add a new Document to a selected Folder, click on the 🛄 add document button to open the Document module.

You will automatically be moved to the Document module in New mode with the Folder ID automatically filled in:

- Document Type and Creation Date are mandatory fields.
- The Folder ID will automatically be entered.

After clicking the Save button, you will remain the in Document module where you can add additional information. You can click on the XXX button to return to the Folder record.

If there is an existing document, this record can be added to a Document Folder by clicking on the XXX button. A pop-up Document query window will allow you to search and select the record.



A document can only be located in ONE document folder. Please refer to the Document module cross reference feature to see to how to associate a document to more than one asset record.

Clicking on kill bring a "Select Document "popup window.

- Search for documents and then click on the I filter button.
- You may setup the filter and select a document from the document list.
- Click on the save button and the document will be added to the Document Folder.

If you want to create a document and add it to the document folder, click on ∠, "New Document" button.

Clicking on *kill* will lead you directly to the Document module, in New Document mode. The only difference you may notice is on the main screen, Document Id and Folder fields are already filled in with the corresponding data.

After typing in the document information and saving the work order, you may click on ⁵ beside the Folder Id field to return to Folder module.

After a Document is added to a folder, it will appear on the main screen, under the corresponding Folder.

S.11.4 Editing Documents

To edit a Document in a Folder, simply click on the document record ID. You will be in the Document module automatically, with the document opened in edit mode. You may edit the document data and after saving the changes, to return to Document Folder module simply click on the \checkmark button beside the Folder ID field.

S.11.5 Deleting Documents From A Folder Record

To delete a document from a folder, click on the $\underline{\blacksquare}$ button. There will be a pop-up window asking for confirmation. If you are sure to delete it, click on the OK button.



The document record is NOT actually deleted from the database because you cannot delete a document from the Document Folder module.

S.11.6 Deleting Folder Records

To delete Folder records, you MUST delete each individual document first (if applicable). Then, you will click on the OPERATIONS menu and select delete folder record.

S.11.7 Printing Document Records

Printing report is available when you query and select a folder record. Click on the print button on the lower right of the Folder main tab to print the report.

S.11.8 Overview of the Document Module

The Document module is used to setup and query documents including all history and relations with equipment records.

Click on Doc Mgmt from the Side Menu Bar Module List on the left hand side of the screen to access the Folder and Document modules. When you enter the Document module you will be in Query mode.

The Module Options Menu at the top of the screen drop down menus for features within the Document module.



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

The Document records will contain the Folder references just like a filing cabinet, if applicable. In order to relate multiple documents to one folder, you should create a folder first and then the document second. By entering the equipment ID or location, you can group common documents into folders for easy tracking and record maintenance.

To know how to create folder records, please refer to the Folder module chapter.

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S.11.9 Adding New Document Records

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

• Click on OPERATIONS on the Module option menu and select New Document from the drop down

OR

- Click on the device new icon at the lower right corner of the screen.
- Enter details in the fields noting that required fields are shaded blue and all others are optional fields. Required fields are: document type and creation date. The Document ID will auto populate and is a required field.
- Click on the save icon at the bottom right hand side of the screen to save the Document Record.
- Once you save the new document, you will then be in edit mode where you can edit and resave the document record.



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

S.11.10 Tracking History and the Document

History is tracked for all changes to the document. This ensures that proper documentation is followed and each version is available for viewing. All revisions have a linked document associated to it for opening and tracking.

For example, a building drawing will be the document and each revision to the building drawing will be tracked as separate history records. Each history line will allow users to open past revisions located on the Linked document server.

To add History (from the main Document Module screen):

- Query and find the Document where History changes are required.
- Click on RESOURCES on the Module option menu and select History from the drop down menu.

OR

- Click on the HISTORY tab in the Document Module.
- Click on the I new icon at the lower right corner of the screen.
- A pop-up file upload window will open. Enter details in the fields noting that required fields are shaded blue and all others are optional fields. Required fields are: modify date, modify by, and revision number. It is required to upload a new document file. The file will be uploaded to the Link document folder where you can then access the file in Web Work. Please refer to the Link Document chapter in this manual. You can click on BROWSE to find the file on your computer that will be uploaded to the Link document folder. A file location is required.
- Click on the save icon at the bottom right hand side of the screen to save the Document Record.
- Once you save the new History, you can edit the record by clicking on the *L* button. To open the document click on the history line.

S.11.11 Cross Reference a Document

One document may be applicable to multiple records in Web Work. For example, a manual could be linked with multiple equipment records. This will allow one Document record to be associated with all corresponding module records rather than creating a document for each module record. This will decrease the number of records and allow users to know what module records can use Documents.

To add a Cross reference or Hyperlink (from the main Document Module screen):

- Query and find the Document where a cross reference is required.
- Click on RESOURCES on the Module option menu and select Cross Reference from the drop down

OR

• Click on the CROSS REFERENCE tab in the Document Module.

Click on the

new icon at the lower right corner of the screen.

- A pop-up file upload window will open. Enter details in the fields noting that required fields are shaded blue and all others are optional fields. The module drop-down will allow selection of the records within a specific module. Once you select a module, you will need to find the record in the selected module to setup the hyperlink. Click on the field lookup icon to search for records within the selected module. A title is required for the hyperlink.
- Click on the save icon at the bottom right hand side of the screen to save the Hyperlink Record.
- Once you save the new Hyperlink, you can edit the record by clicking on the edit button or open the document by clicking on the Hyperlink line.
- A hyperlink will then display in the module record in the Tools menu under links. This is where you can select and open the Document record.