6.4 Supplemental

S

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

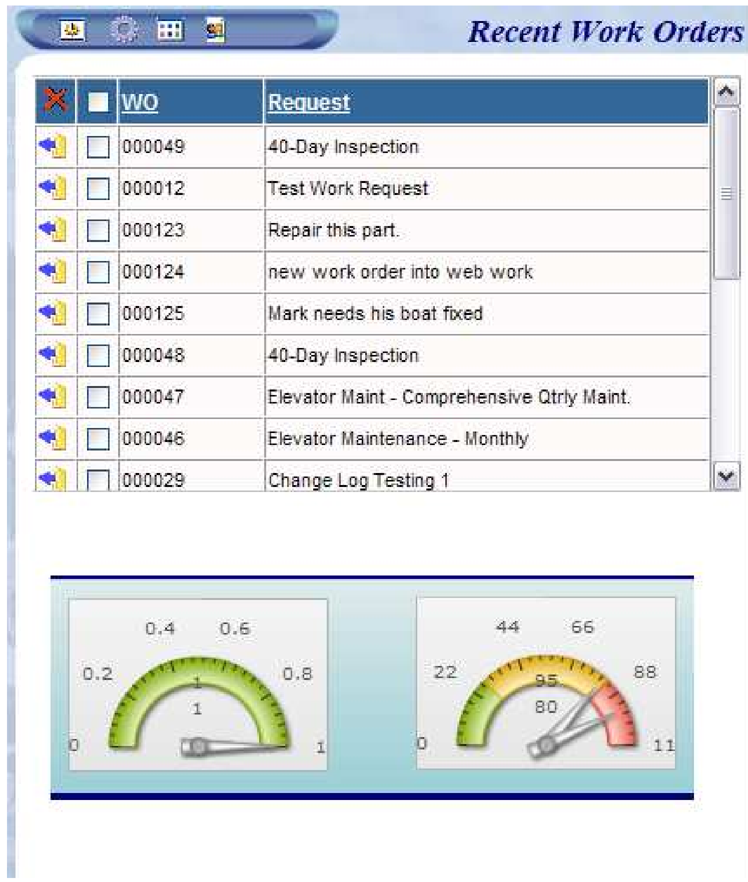
Details of all the changes will be covered in the individual module sections.

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 <u>User Control Panel</u>

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.



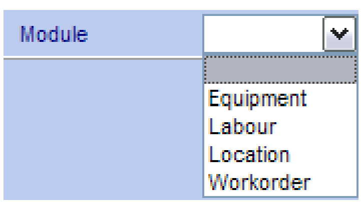
The User Control Panel is unique for each User.

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

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.



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.

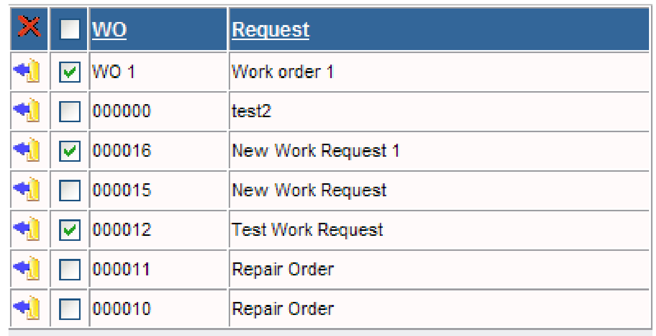
S.2.2 <u>Worklists</u>

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 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. This will remove all items from the Work List.



		WO	Request
	☑	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 <u>Work Orders</u>

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.

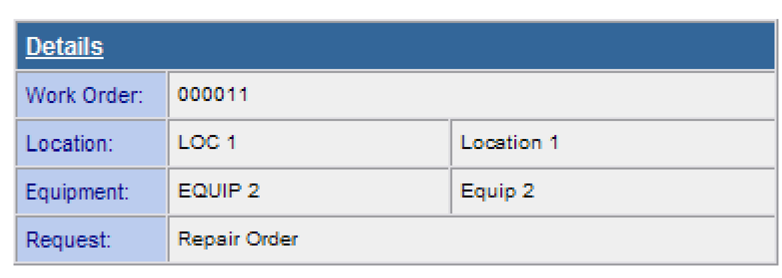
New Request shows all Work Orders that have the status of NEWREQ. This displays the same information as clicking on the globe in the top left corner of the Web Work screen.

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	

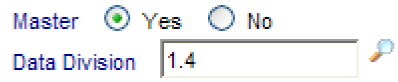
To move items in the list to the left side of the screen in order to view the work order in more detail, click . This will move the Work Order over to the main screen for viewing and editing.

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 <u>Equipment, Location and Labour</u>

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 Master Records



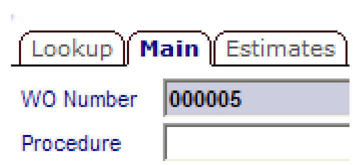
Master records are new to four of the modules in Web Work. The Procedure, Equipment, Location and Vendor modules now allow users to set a record as masters. When a record is set as Master only people with permission to edit Master records will be able to change it, thus insuring greater security of data.

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

WO Number	Request	Location ID	Equipment ID	Status	Open Date
000000	test	MAIN MALL	EQUIP 1	APPR	2/22/2008
000003	test			APPR	2/22/2008
000004	PM 1			APPR	2/22/2008
000005	PM 1			APPR	2/22/2008
000006	Test WO 1			APPR	2/22/2008
000007	PM 3			APPR	2/22/2008
000008	PM 3			APPR	2/22/2008
000010	Repair Order			APPR	2/24/2008
000011	Repair Order	LOC 1	EQUIP 2	COMP	2/26/2008
000012	Test Work Request			APPR	3/4/2008
000013	Procedure 0003		000007	APPR	3/7/2008
000014	New Work Request	LOC 1	EQUIP 2	APPR	3/7/2008
000015	New Work Request			NEWREQ	3/7/2008
000016	New Work Request 1			NEWREQ	3/7/2008
000017	New WO 1			NEWWO	3/7/2008
000021	New PM 1			APPR	3/7/2008

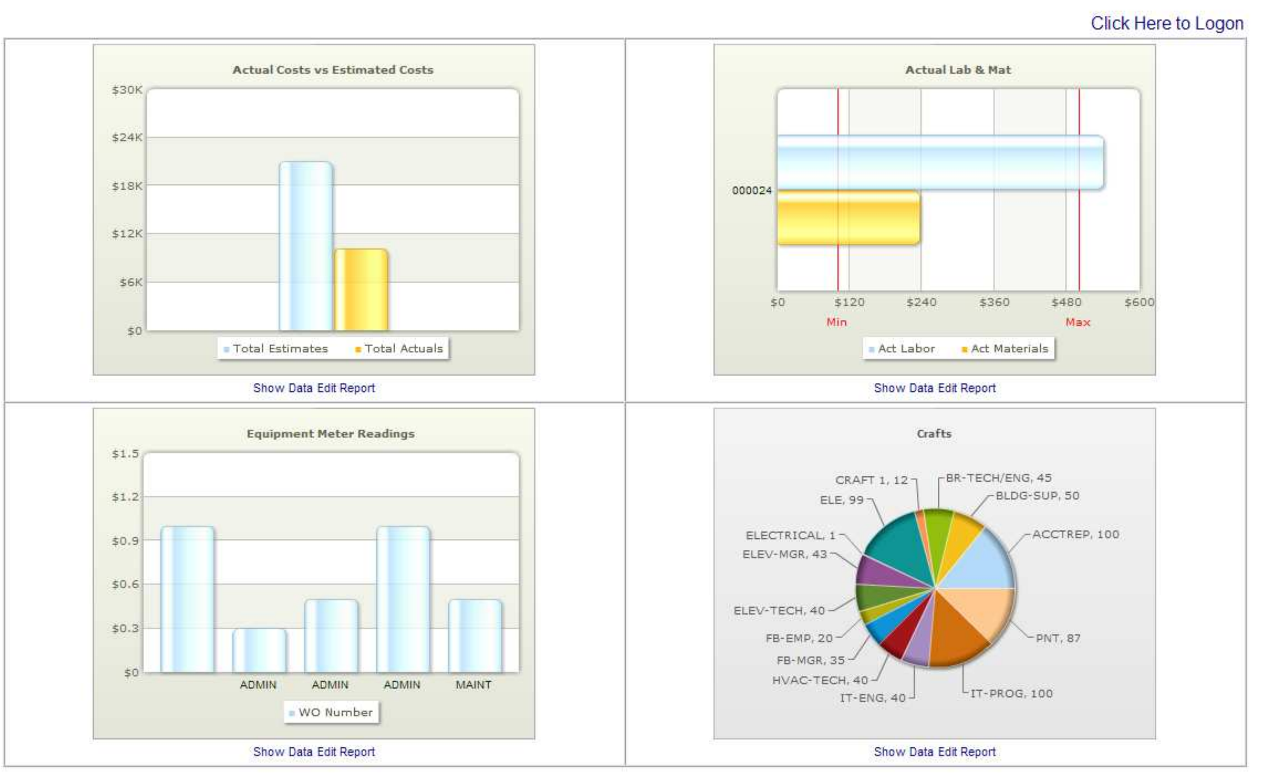
The Lookup Tab now gives the user the ability to return to the query results at any time while working in that module. The Lookup Tab is now the first tab in every module giving users easy access to the records that were queried.



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.

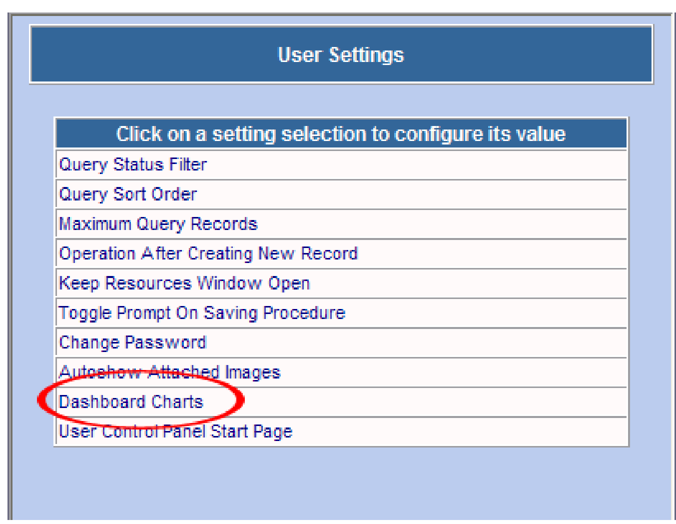


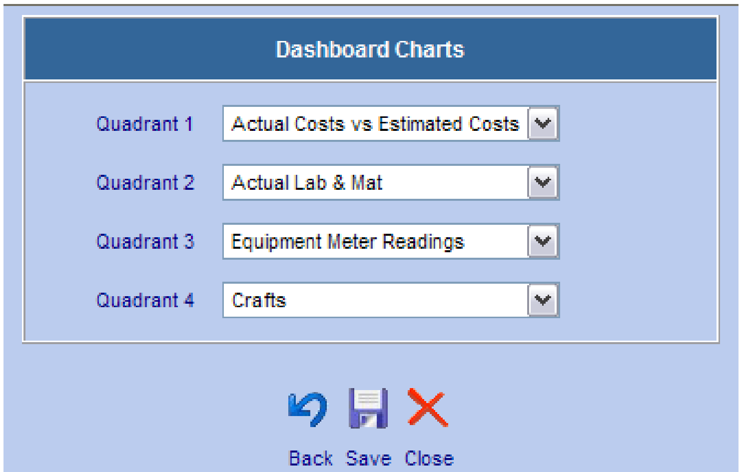
The Dashboard is divided into four quadrants, each one showing a different graph that was created using Report Writer.

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. The User Settings screen will open.

Choose Dashboard Charts and the Dashboard Charts screen will open.





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 selected, 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

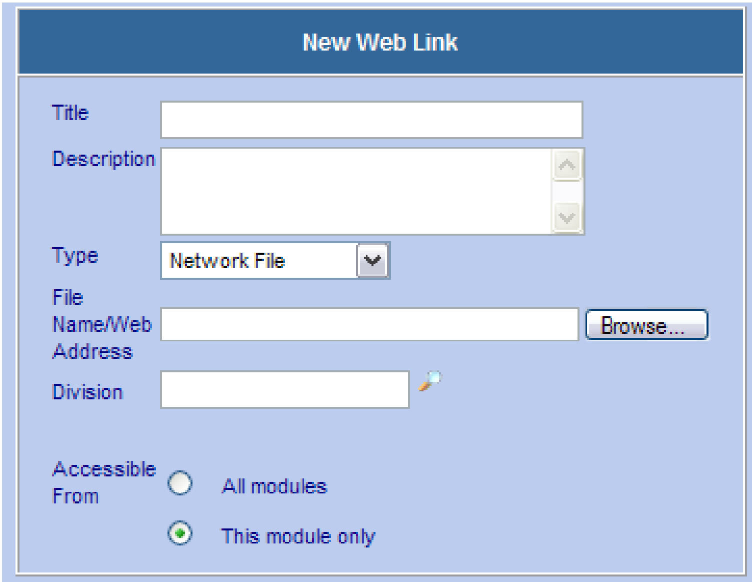
S.2.8 Links

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.



- 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.

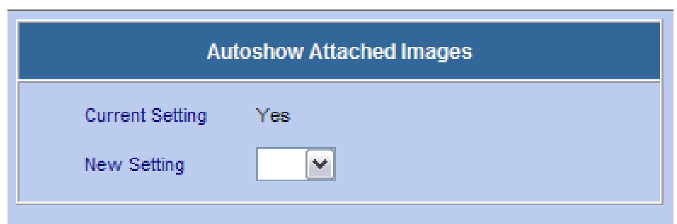
  If it is not known, click Browse... . This will open a standard Windows file Browser.
- Browse to the file that you would like to link to and click open. The file name and address will auto fill into the field.
- Enter a data division if required and choose if the link will be available.

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 down list and click  to save.
- Click  to close the screen.

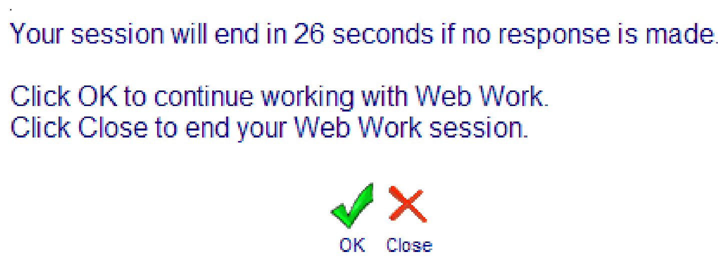


S.3 Miscellaneous Changes

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.

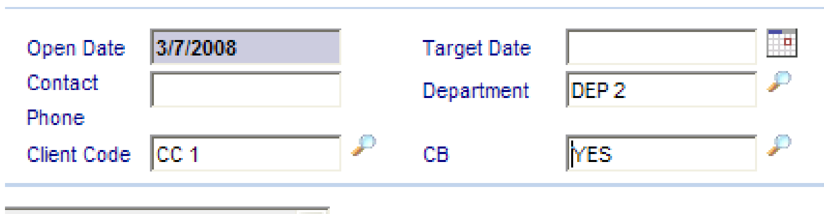
By clicking Ok, Web Work will remain open. By taking no action or by clicking close, Web Work will close.



S.4 Maintenance

S.4.1 <u>Work Request</u>

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.



S.4.2 <u>Work Order</u>

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.

S.4.3 <u>Main Tab</u>

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.

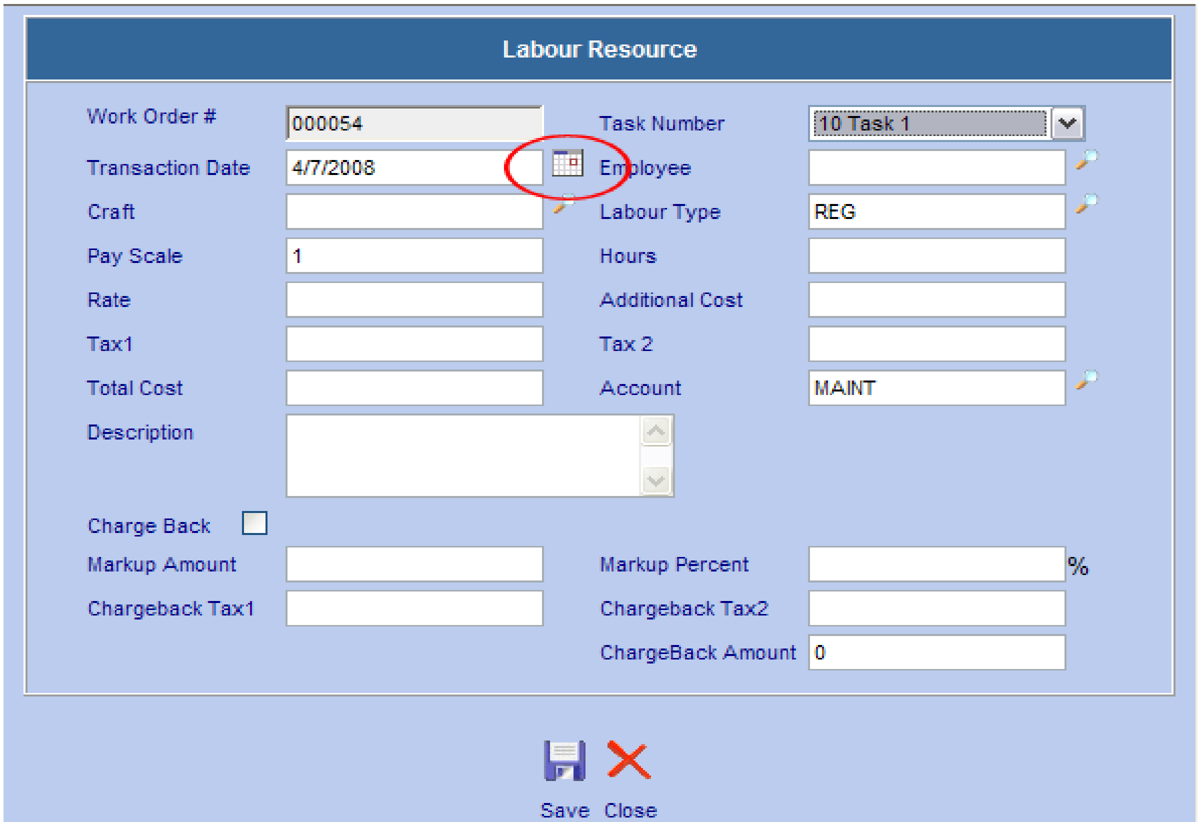
The Chargeback and Client Code fields allow the user to mark the Work Order as a Chargeback instead of just the individual labour and material entries.

S.4.4 <u>Estimates Tab</u>

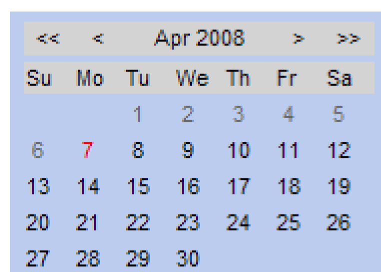
The Estimates Tab now has two new sub tabs; the Services Tab and the Schedule Tab. Please see the sub sections for each of these tabs for more information.

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.



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.

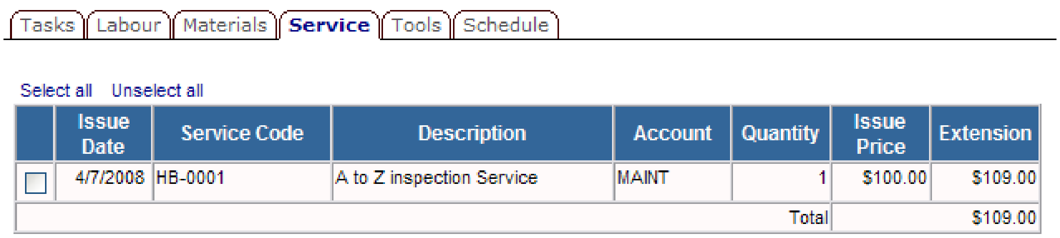
- To use the Date Pick list, click on the calendar icon next to the Transaction Date field.
- The Date Pick List screen will open.

- 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 Services Tab

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.

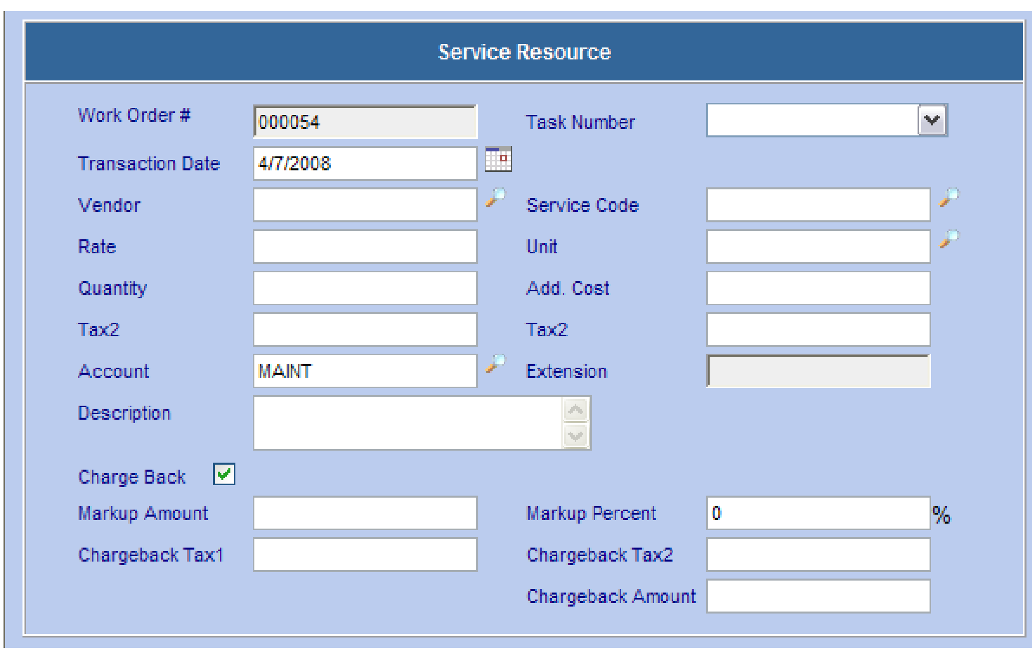


	Issue Date	Service Code	Description	Account	Quantity	Issue Price	Extension
☐	4/7/2008	HB-0001	A to Z inspection Service	MAINT	1	$100.00	$109.00
					Total		$109.00

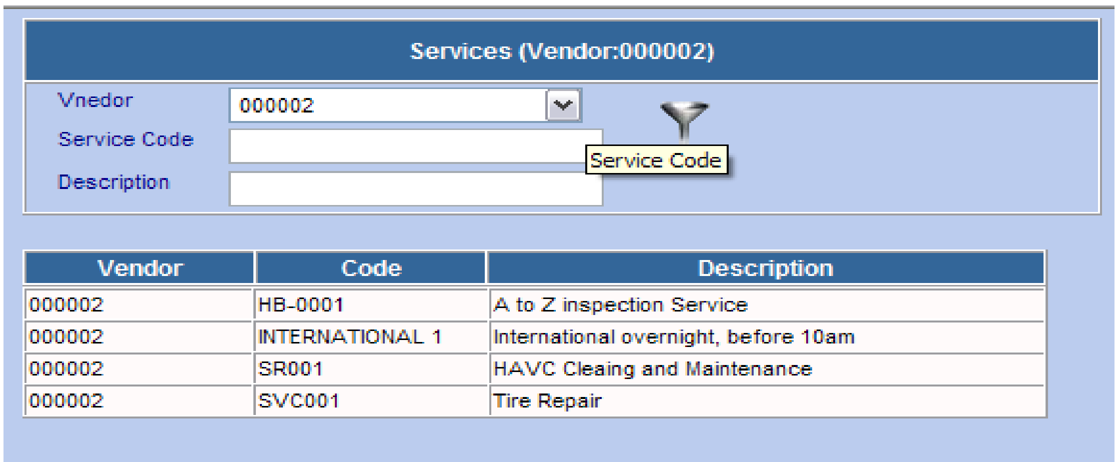
For More Information on Services, Please see Section 5.3.3

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.



- 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 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 next to the Service Code Field. The service search screen for that Vendor will open.
- Click the filter icon to populate the Pick List with available services from that vendor.
- Select the required service from the list.



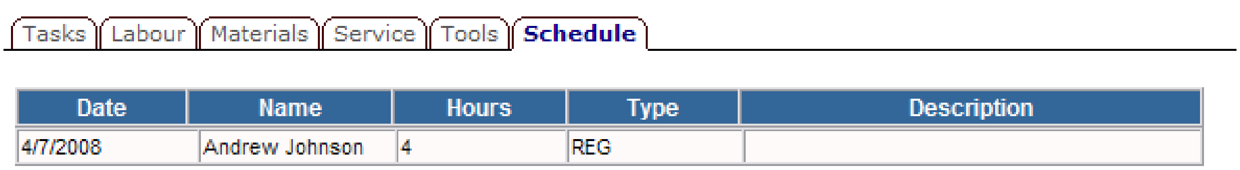
- The Service Code, Rate, Unit as well as the Description fields of the Service Resources screen will auto populate with the information entered in the Vendor Services tab for that service.
- Fill in the Quantity field and click tab. The extension price will be auto calculated.
- Fill in any other information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

S.4.9 Tools Tab

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.



S.4.11 Actuals Tab

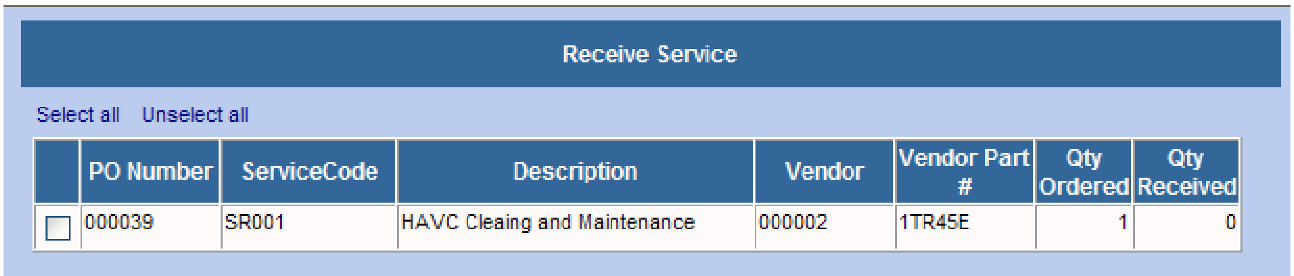
All the changes that have been added to the Estimates tab have been carried over to the Actuals tab.

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 to open the Receive Service.

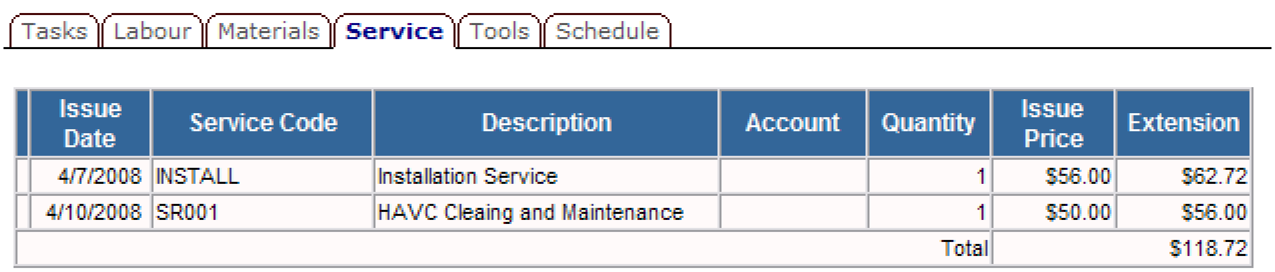


Receive Service

Select all Unselect all

	PO Number	ServiceCode	Description	Vendor	Vendor Part #	Qty Ordered	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 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 to receive the Service to the Work Order.
- The Service will now be listed under the Actual Services tab of the Work Order.



Tasks | Labour | Materials | Service | Tools | Schedule

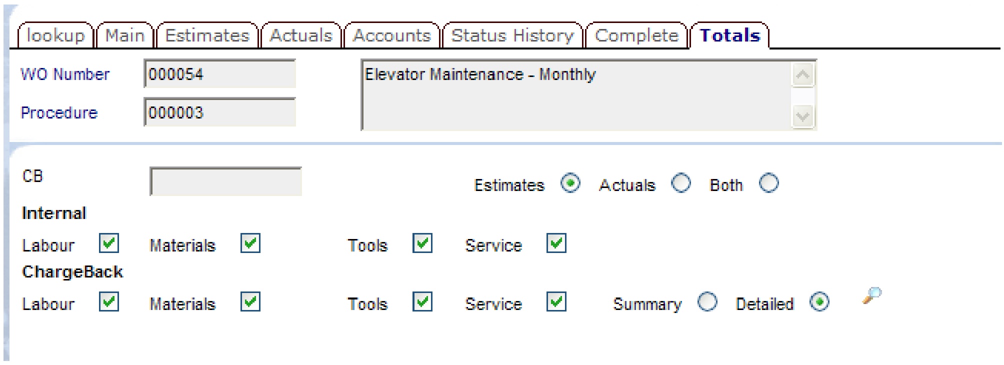
Issue Date	Service Code	Description	Account	Quantity	Issue Price	Extension
4/7/2008	INSTALL	Installation Service		1	$56.00	$62.72
4/10/2008	SR001	HAVC Cleaing and Maintenance		1	$50.00	$56.00
				Total		$118.72

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



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.

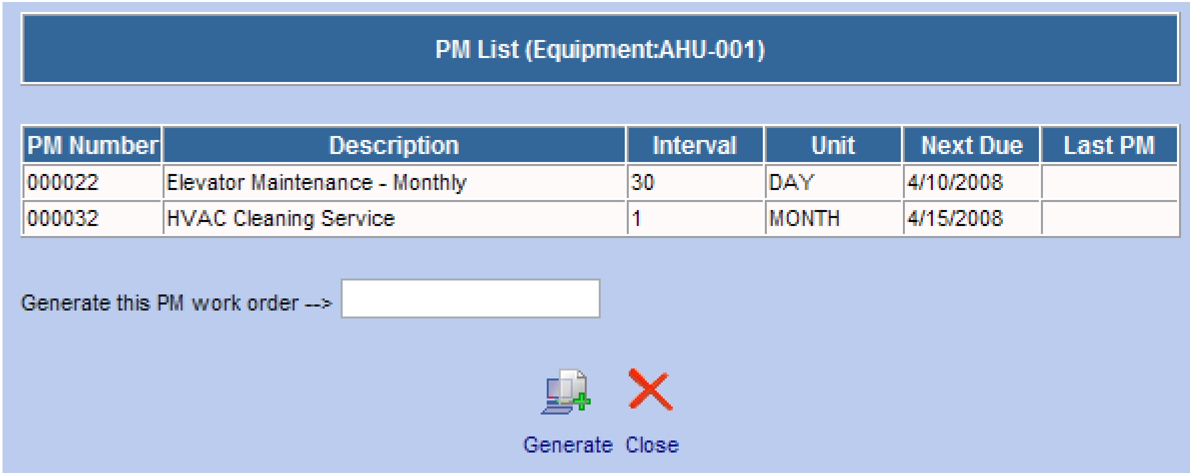
The Detailed Report breaks down the information into individual entries for each section.

Once all the criteria for the report have been selected, click the lookup button 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 lookup next to the PM number field. This will open the PM List window.



PM Number	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	

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.

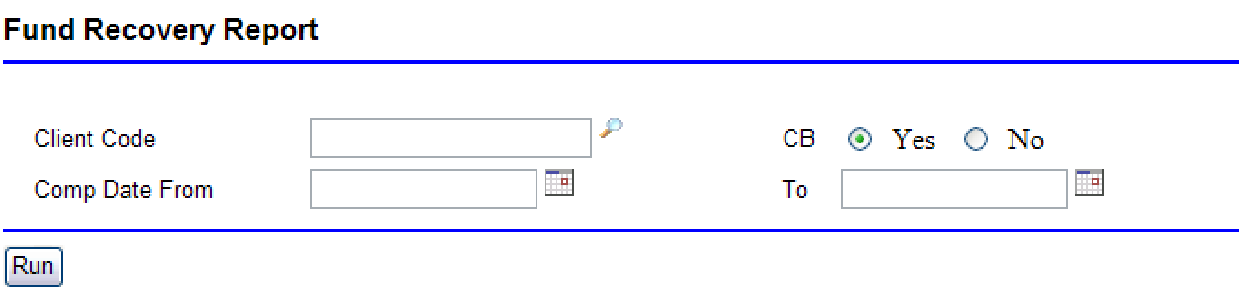
The user can now complete the PM and Work Order as per usual.

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



- Enter the Client Code or click 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 to open the Calendar Pick list.
- Enter the To date (This is the end date of the time period) or click to open the Calendar Pick list.

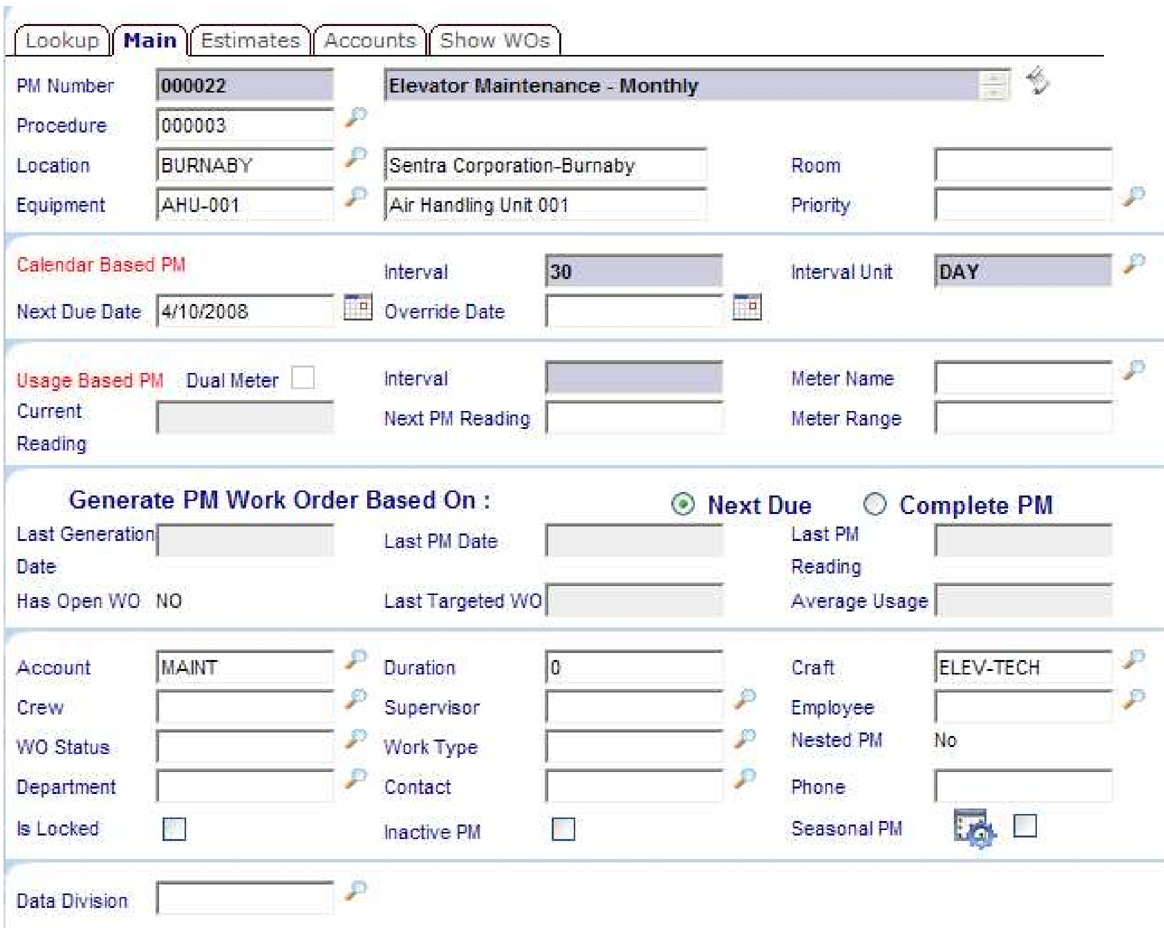
- To run the report click 

 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 <u>PM</u>

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 <u>Main Tab</u>



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.

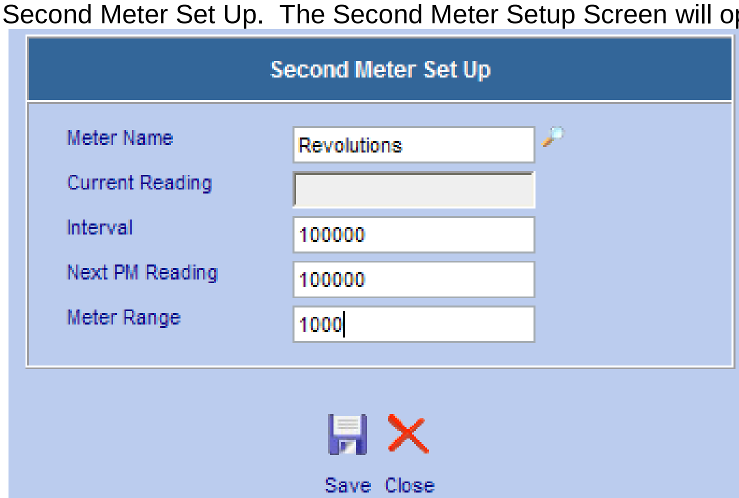
For example; if you have a PM that must generate every 30 days or 150 hours simply create a PM that has the Calendar Based PM section filled out for a 30 day interval and fill out the Usage Based section just as you would for a PM that will generate every 150 hours.

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 to save the PM.
- Click Resources and then Second Meter Set Up. The Second Meter Setup Screen will open.



- Click 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.

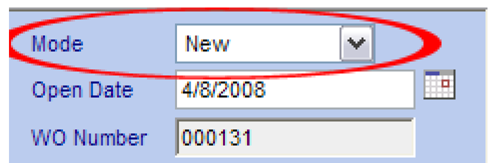
S.4.22 Repair Order

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.

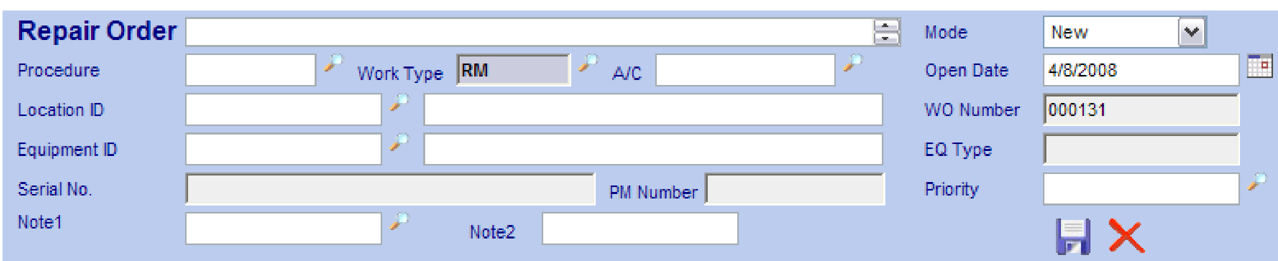
S.4.23 Creating a New Repair Order



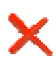
To create a new Repair Order choose New from the Mode Drop down screen. This will create a New Work Order number and populate the WO Number field with it and fill in the Open Date with the Current date.

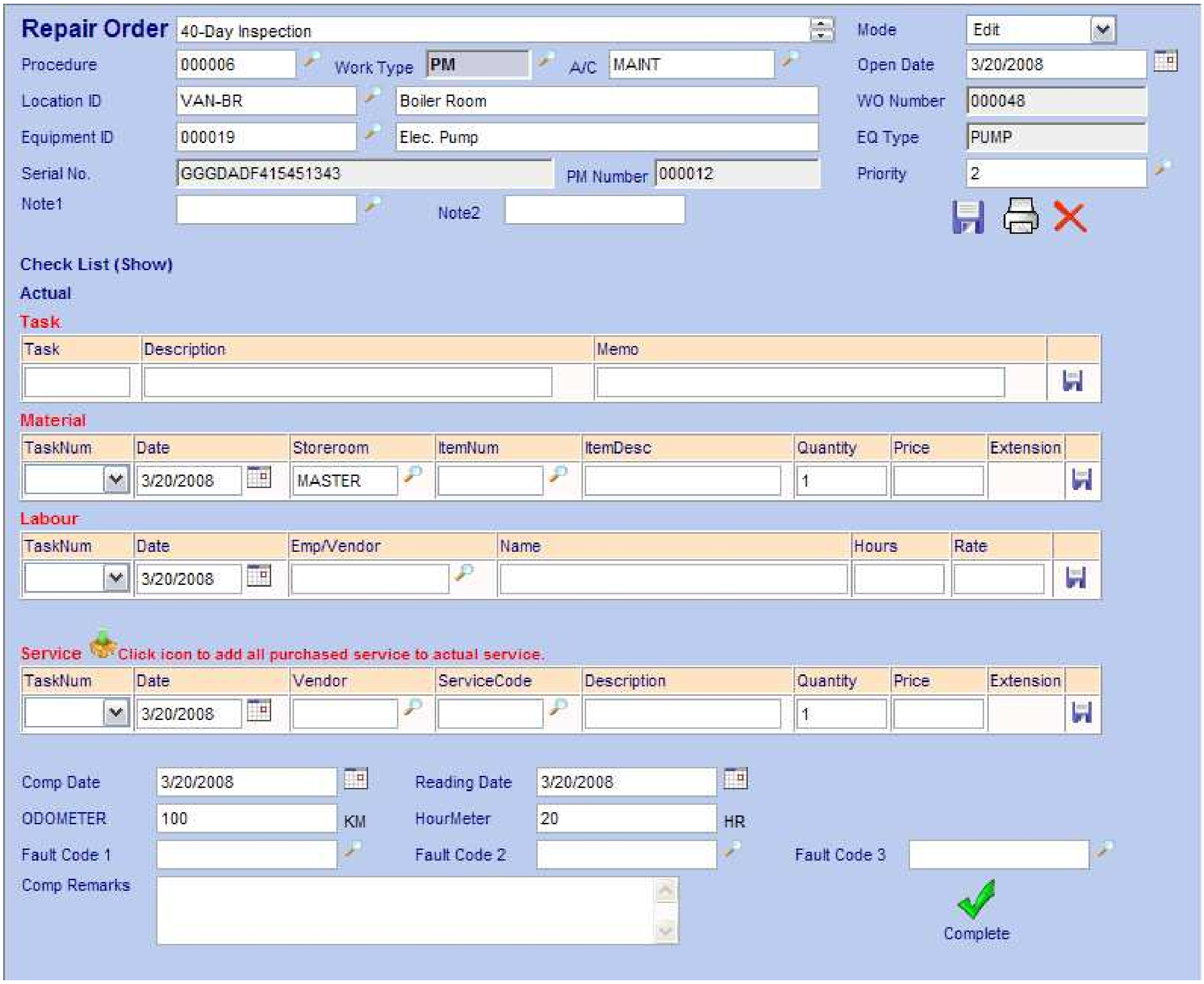
If the user wishes to change the Open Date they must change it before the Repair Order is saved.

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.

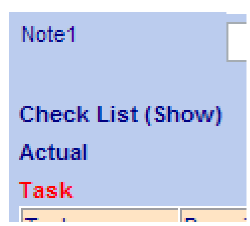


Fill in any other fields that are required for the Repair Order and click save  to save the repair order.

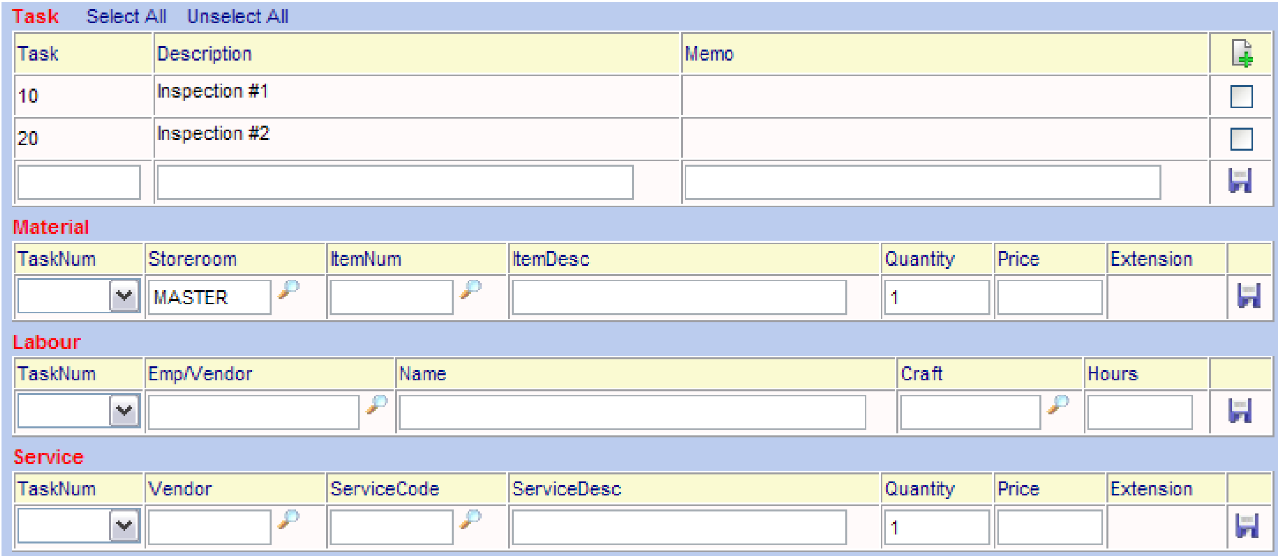
To cancel the creation of the Repair order click close  to discard.



- 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 Repair Order Estimates



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.
- The default Storeroom is always entered into the Store. If the Material is being issued from a different storeroom click lookup 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 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 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.

Labour   Select All   Unselect All

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

- 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   Select All   Unselect All

TaskNum	Storeroom	ItemNum	ItemDesc	Quantity	Price	Extension	
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			1			

- 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.

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.

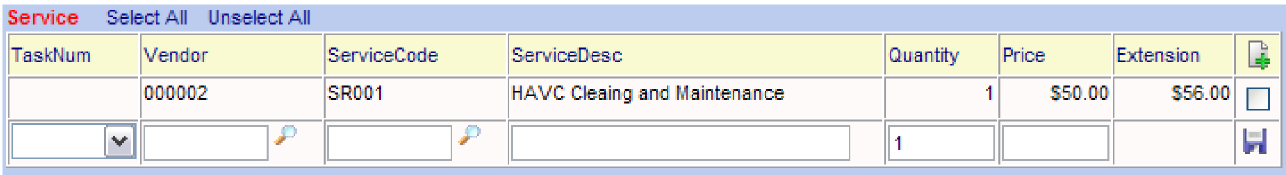
- Select the task to associate the Labour entry by using the dropdown list in the TaskNum column.
- If the Employee code is known, enter it in the Emp/Vendor Field and click tab. This will validate the code and fill in the Name and Craft associated with that record. If the Employee Code is not known, click look up 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.4.30 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 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.



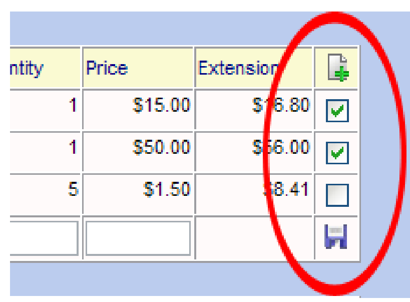
- Select the task to associate the Service entry by using the dropdown list in the TaskNum column.
- If the Vendor code is known, enter it in the Vendor Field and click tab. This will validate the code. If the Employee Code is not known, click lookup next to the Vendor field. This will open the Select 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 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.

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 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		

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 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 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 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.4.37 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	ItemNum	ItemDesc	Quantity	Price	Extension	
	4/10/2008		Non Inventory	3/4 Lug Nut	5	$1.50	$8.40	
	4/10/2008	MASTER			1			

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 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)

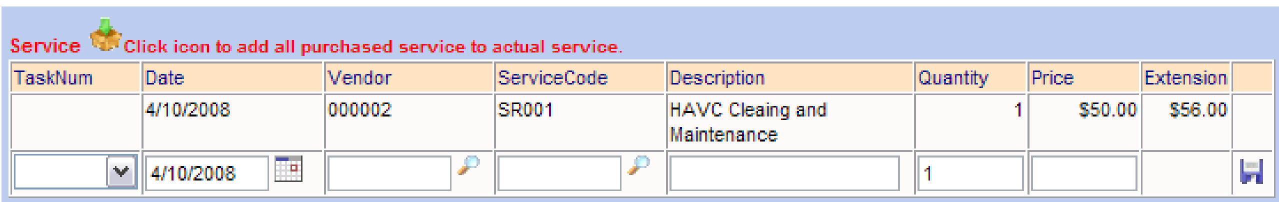
- Select the task to associate the Labour entry with by using the dropdown list in the TaskNum column.
- If the Craft code is known enter it in the Craft field and click tab. This will validate the code. If the Craft code is not known, click lookup next to the Craft field. This will open the Select Craft 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					

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 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 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 Click icon to add all purchased service to actual service.

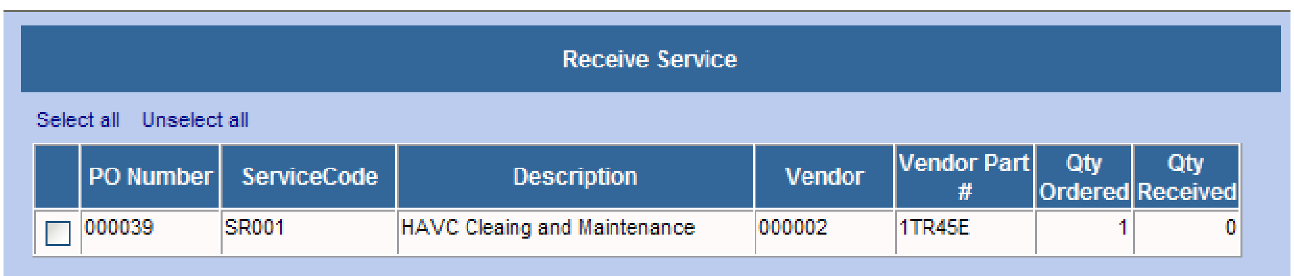
TaskNum	Date	Vendor	ServiceCode	Description	Quantity	Price	Extension	
	4/10/2008	000002	SR001	HAVC Cleaing and Maintenance	1	$50.00	$56.00	
	4/10/2008				1			

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 to open the Receive Service.



Receive Service

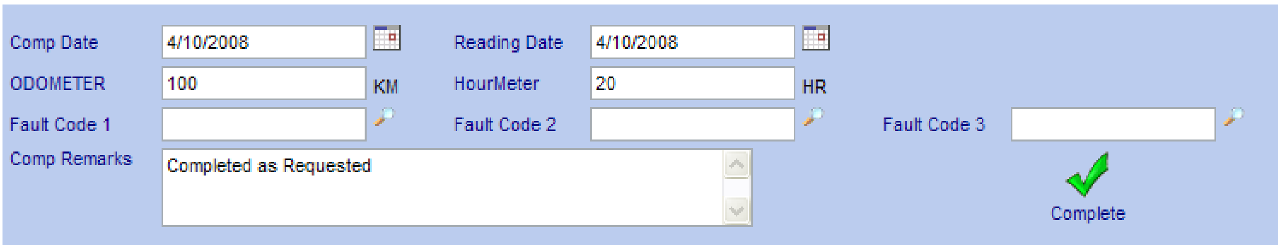
Select all Unselect all

	PO Number	ServiceCode	Description	Vendor	Vendor Part #	Qty Ordered	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

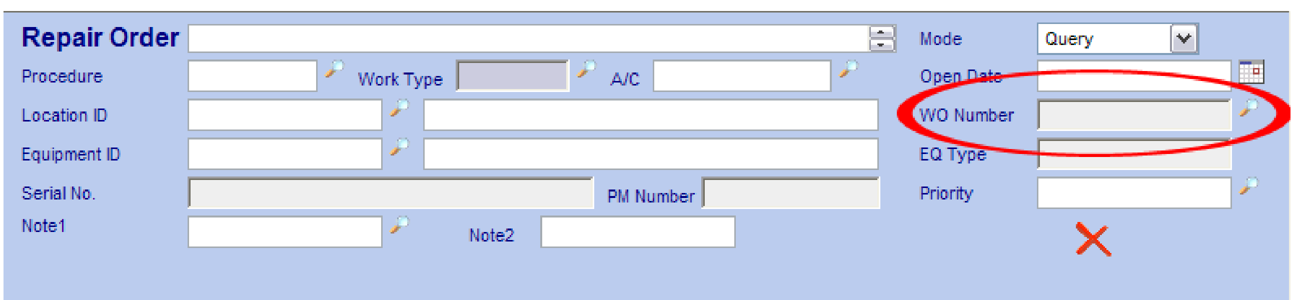
The lower section of the Repair Order (below the actuals) is where the information for the completion of the PM is entered.



- 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 in the lower right hand corner of the screen the Repair Order has already been completed.

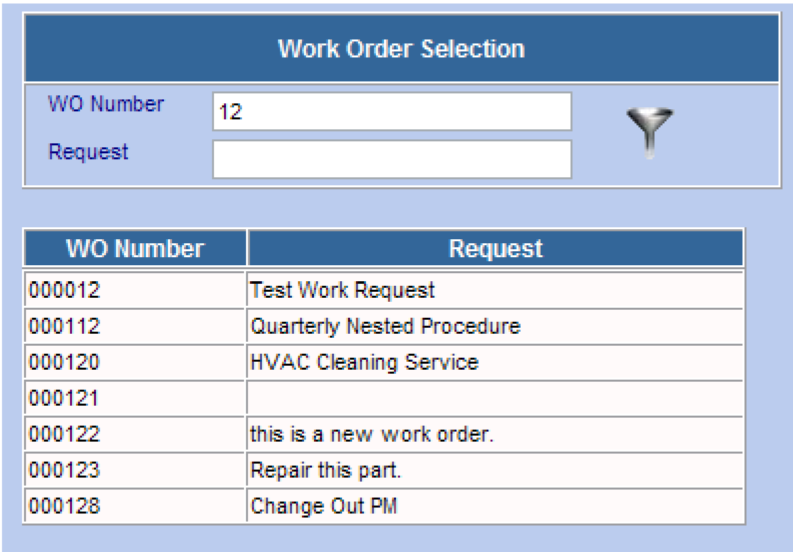
S.4.43 Repair Order Query

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



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

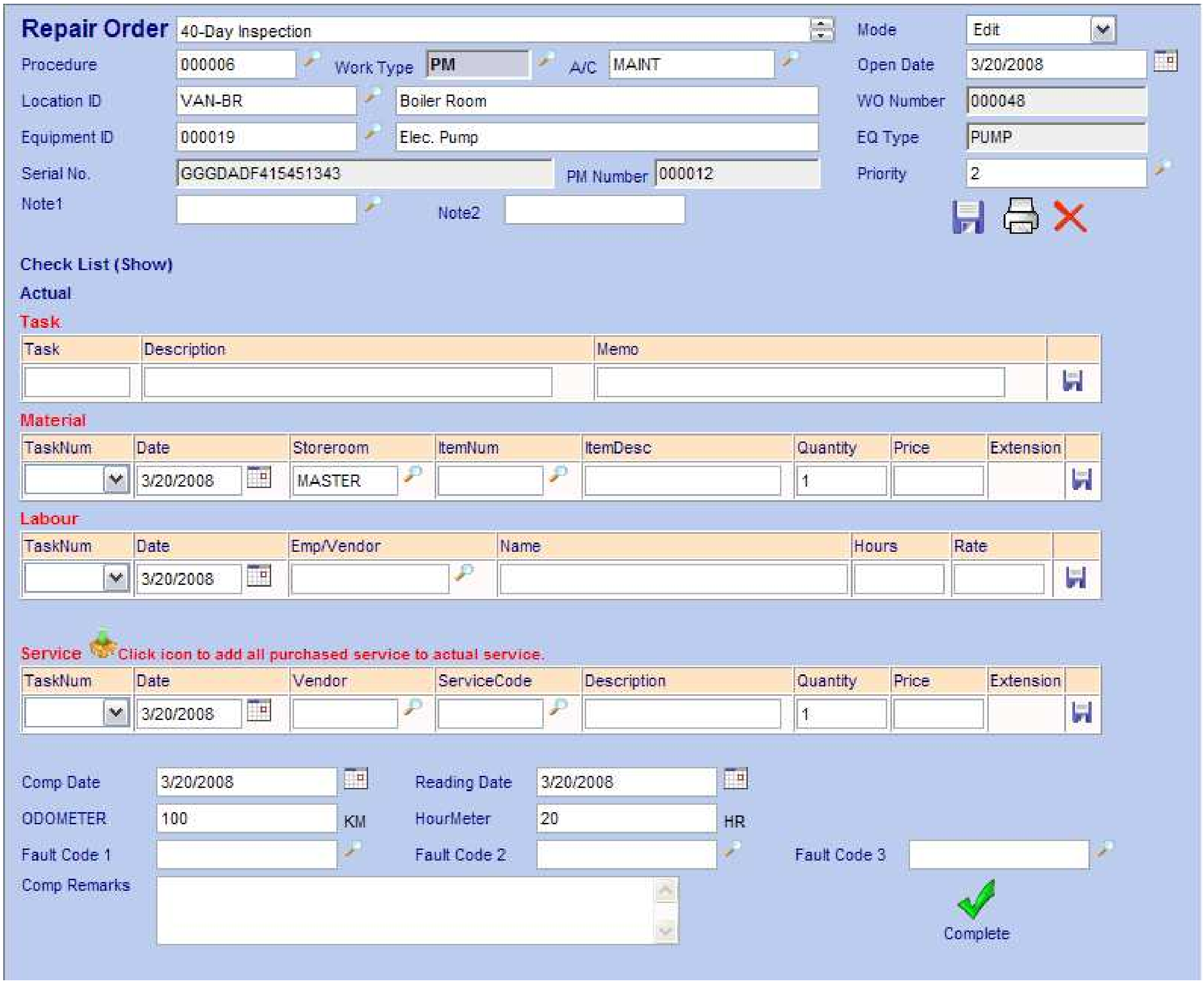
If the Work Order number is not known, click next to the WO number field, this will open the Work Order Selection screen.



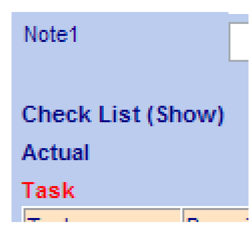
The Work Order Selection screen allows the user to limit the search based on WO Number or the Request.

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 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.



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)**.

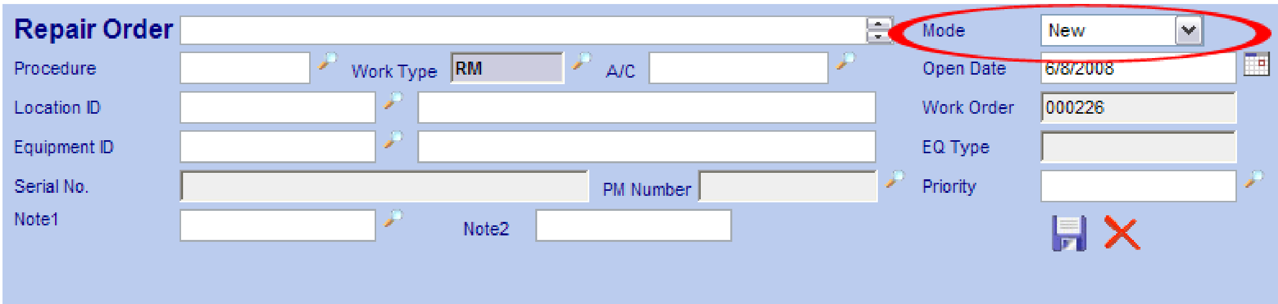


Items listed in Yellow are estimates; Items listed in Pink are Actuals.

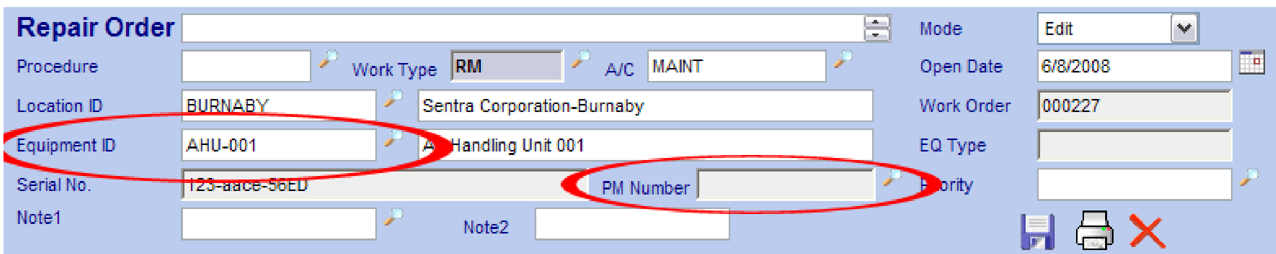
S.4.44 Generating PMs via the Repair Order

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.

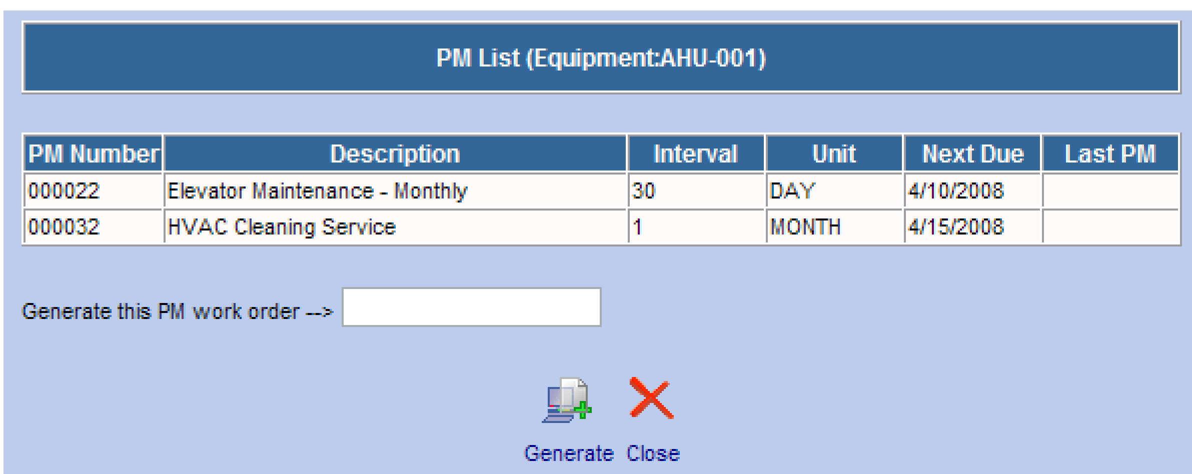


Select an Equipment ID from the Lookup List and click save.



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 Number	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	

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.

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.

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.

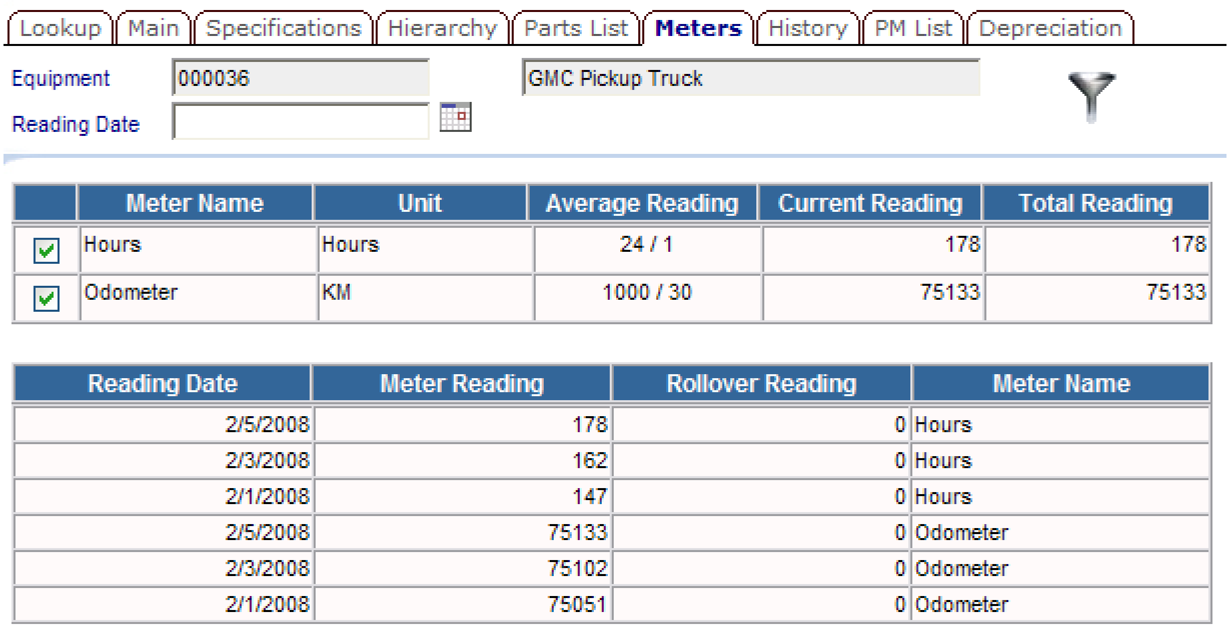
S.5.4 Parts List Tab

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.



	Meter Name	Unit	Average Reading	Current Reading	Total Reading
☑	Hours	Hours	24 / 1	178	178
☑	Odometer	KM	1000 / 30	75133	75133

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

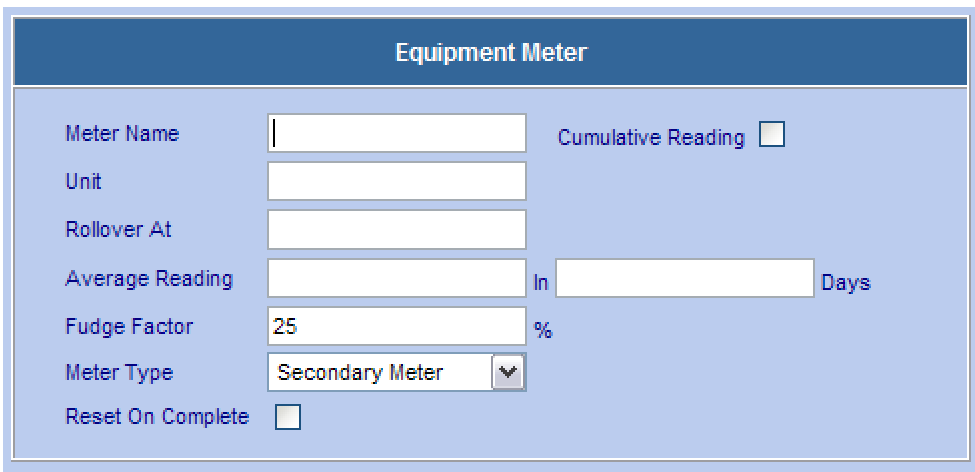
To add a new meter to the Equipment Record click New Meter  on the bottom right side of the Meter Tab. The Equipment Meter screen opens:

- 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 to save the meter.



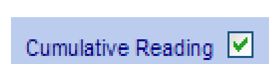
If no meter error checking is required simply leave the Average Reading and Days fields empty.

C5.6.1.1.1 Cumulative Meter

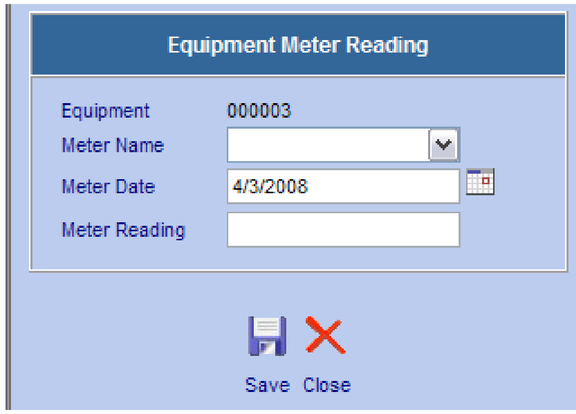
Cumulative Meters are new with this version of Web Work. A Cumulative meter is a meter where instead of entering the new total for the meter the user only enters the additional amount to the meter.

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.



S.5.7 Adding a New Meter Reading



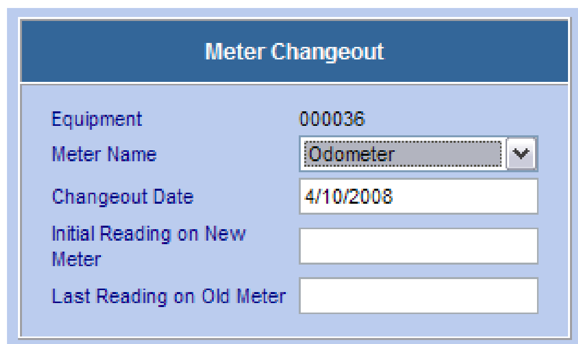
- To add a new Meter Reading to a meter click new on the meter tab. This will open the Equipment Meter Reading screen.
- Choose the Meter Name from the drop down list.
- Enter the date of the Meter Reading.
- Enter the Meter Reading.
- Click save to save the reading.

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 in the Meter Tab. The Meter Changeout screen will open.

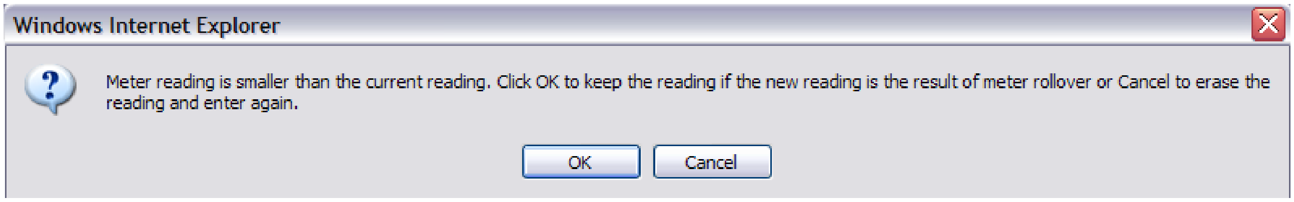
- Choose the Meter Name from the drop down list
- Enter the date the Changeout occurred in the Changeout Date field.
- Enter the Intial Meter Reading of the new Meter in the Initial Reading on New Meter Field.
- Enter the Meter Reading of the old meter when the Changeout occurred in the Last Reading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



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 Meter Rollover

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.



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	KM	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.

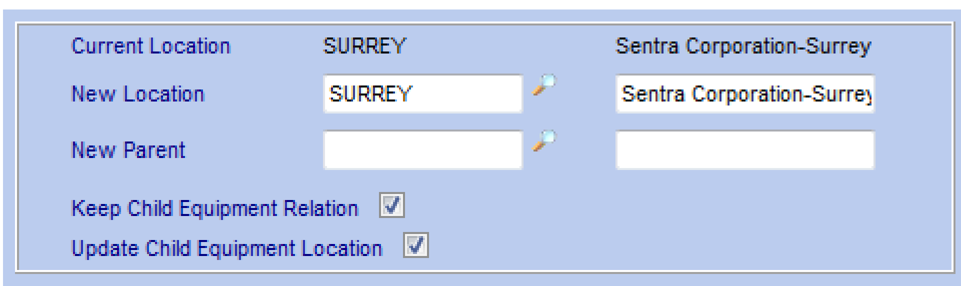
Status:
Can change to any valid Status code except:

- 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.

S.5.14 Changing Data Division

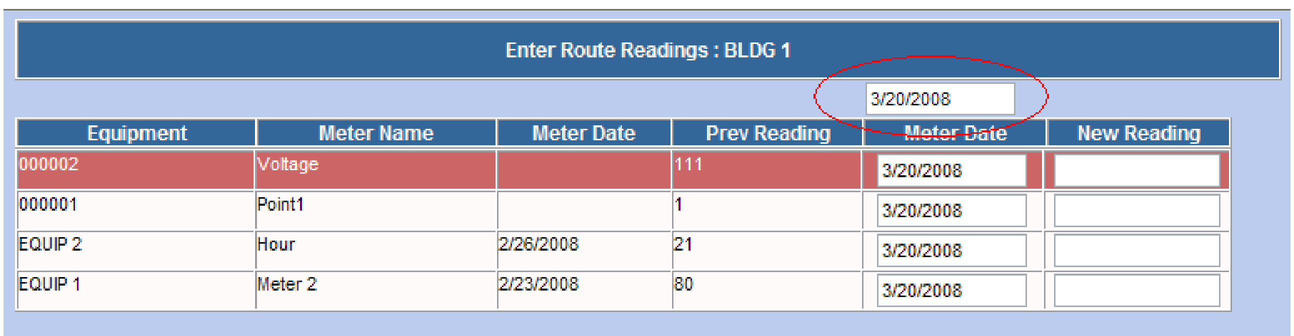
If the Division is changed then all Children Equipment and associated records (including Procedures, PMs, Work Orders) will be updated to the new Division except records that have a NULL Division or are already in a Sub-Division.

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.

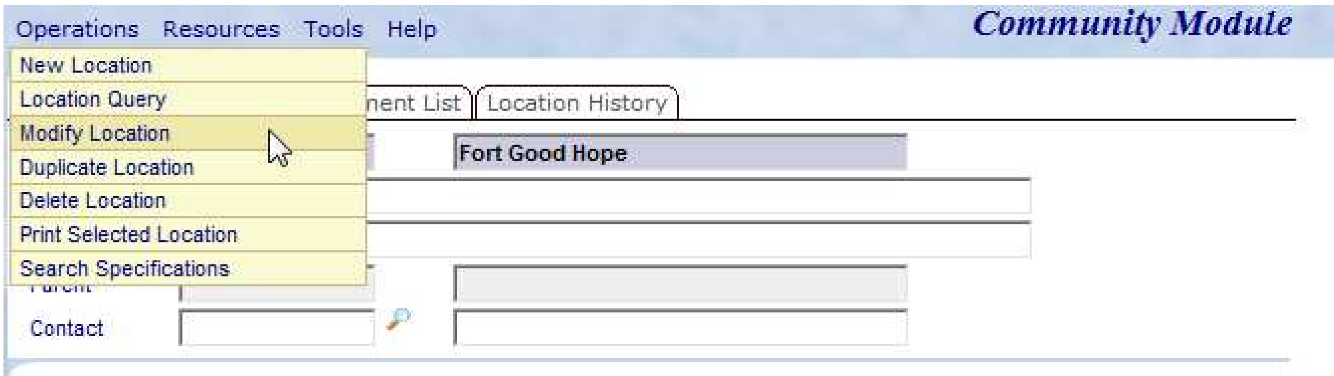
S.5.16 Changes to the Location Module

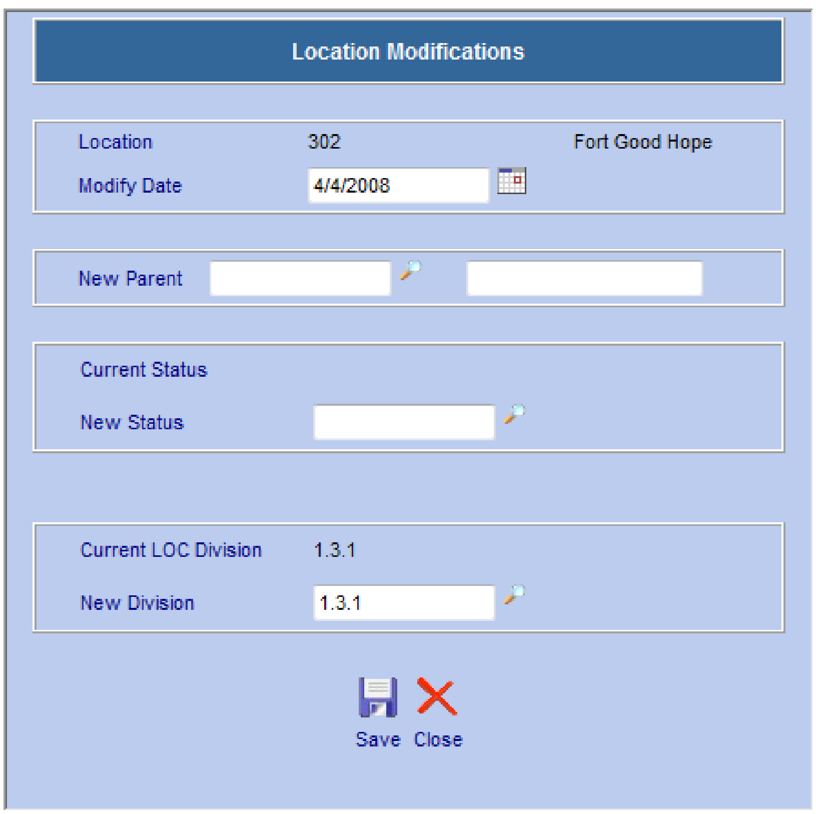
Besides the addition of the Control Panel and the Lookup Tab, the Location module now also has the added security of the ability to mark a record as Master limiting the user that can make changes to these records.

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.





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:

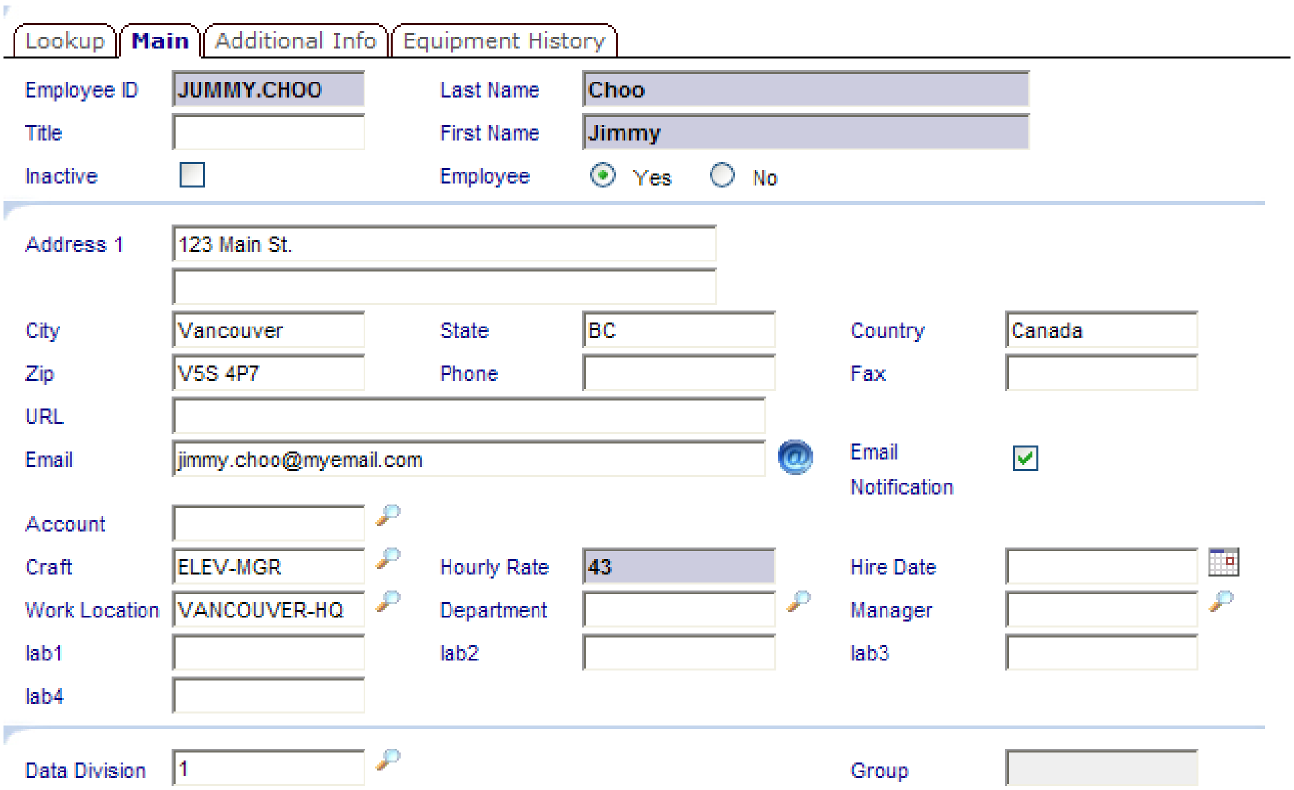
- If a Child Location and associated records Division are the same or a Sub-Division of the Location's old Division, then all Child Locations and associated record's Divisions will be updated to the new Division (i.e. they will follow the Parent Location's move to the new Division);
- If a Child Location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

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.

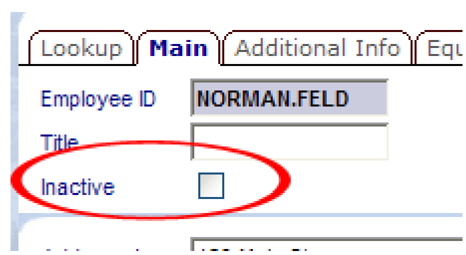
S.5.19 Changes to the Labour Module

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.



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.

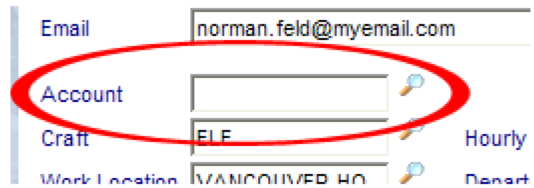
To set a record Inactive put a checkmark in the box and click save at the bottom of the page.

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.



S.6 Inventory

S.6.1 Inventory

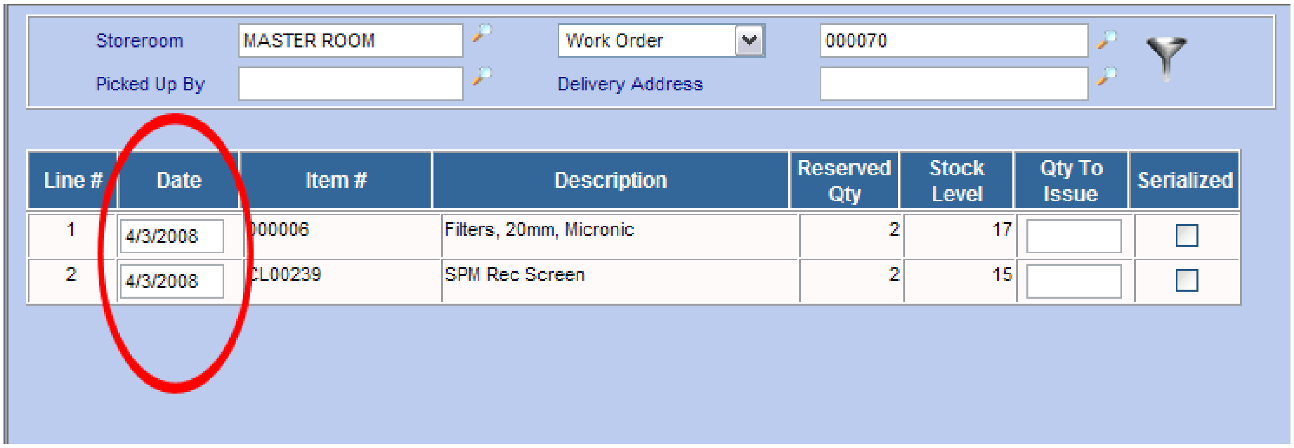
The changes to the Inventory module are mostly located on the Main Tab with the exception of the Lookup Tab and changes to the Issuing of reserved items.

S.6.2 Main Tab

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:

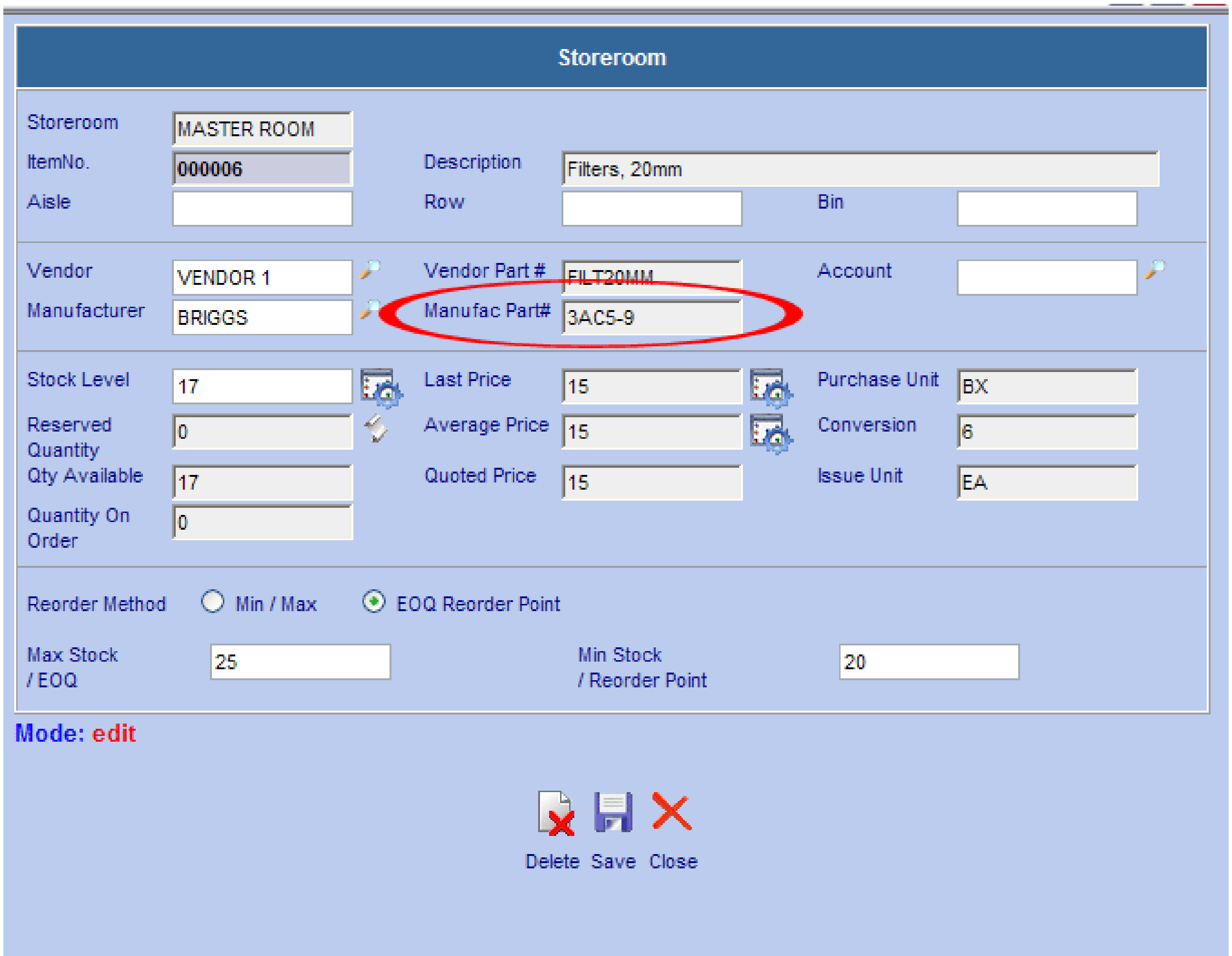


To change the Transaction date:

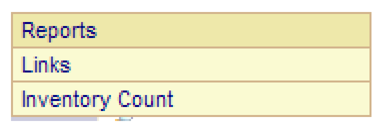
- Highlight the Date for the Line # that you would like to change.
- Enter the Date that you would like the Issue to be listed in the record (mm/dd/yyyy).
- Click Tab to validate.

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.



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.



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

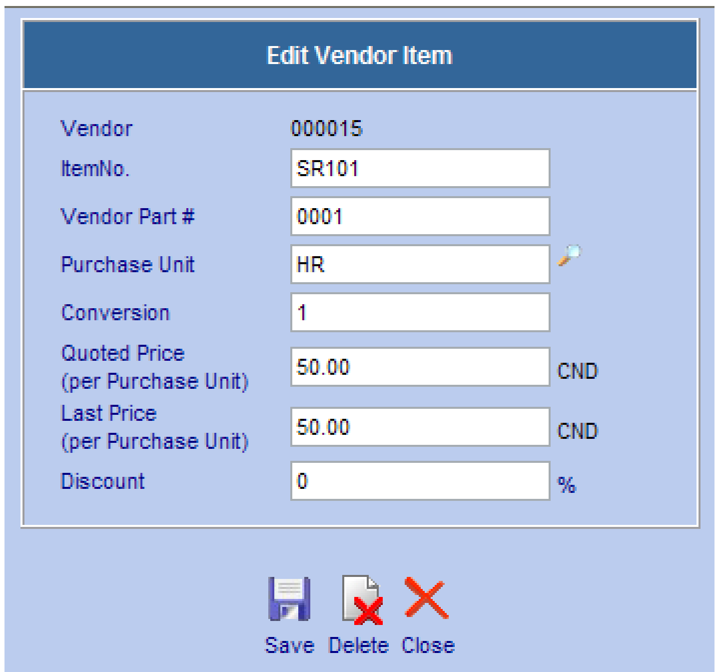
The most important change to the Main Tab of the Vendor Module is the ability to add a Data Division to the Vendors. This simple security measure makes sure that users can only see their own Vendors and create PO's from them.

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

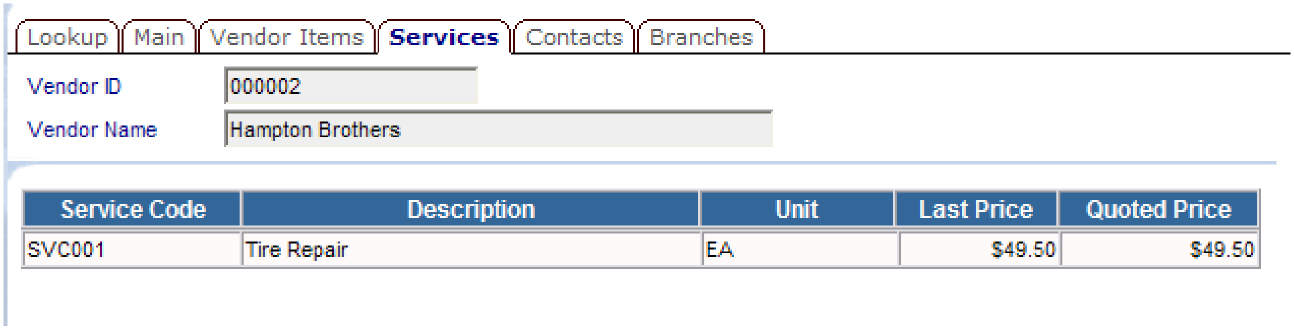
In order to track the prices of items from Vendors, the **Last Price** field has been added to the **Edit Vendor Item Screen**.

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

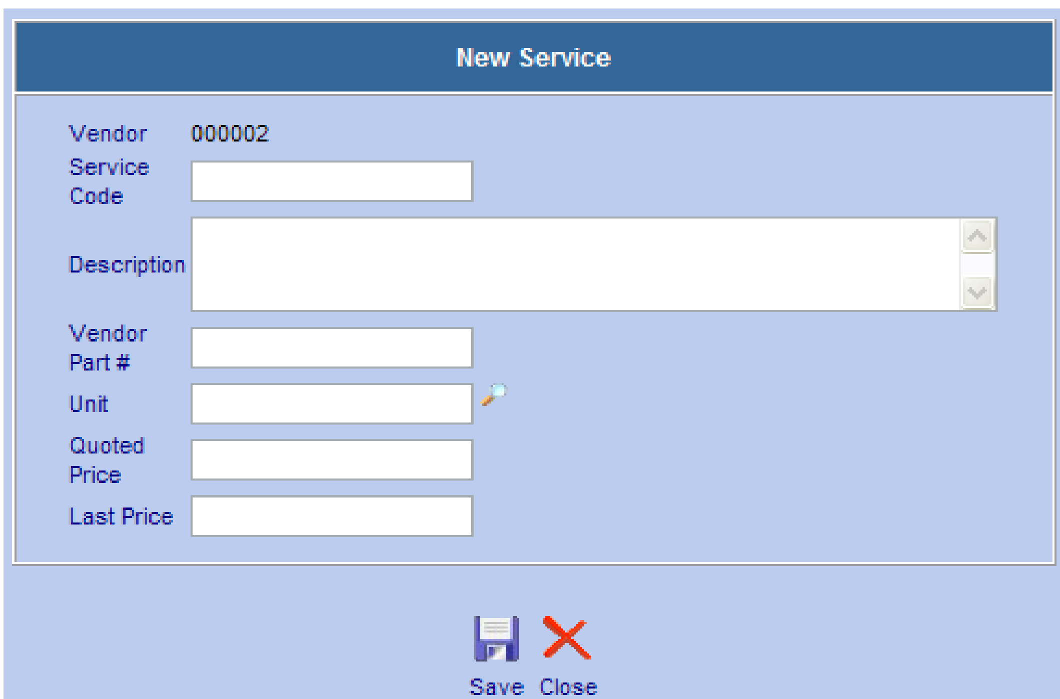


S.7.3 Services Tab

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.



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

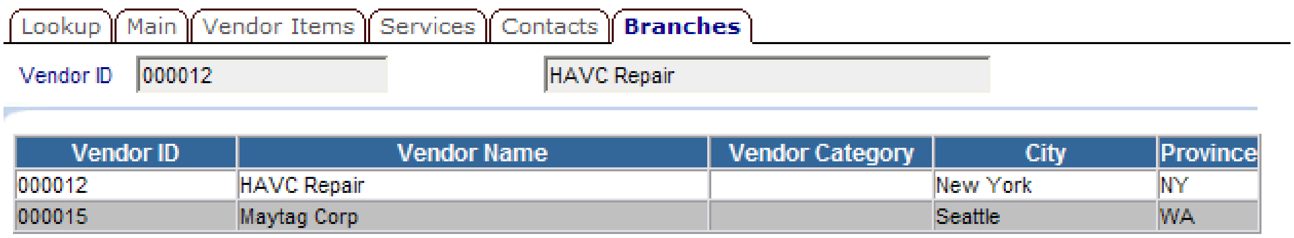


- Fill in the service code.
- Add a description for the service.
- Enter a Vendor Part Number if one exists.
- Enter a Quoted Price and a Last Price.
- Click save and the service entry is complete.

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 | Vendor Items | Services | Contacts | Branches

Vendor ID 000012 HAVC 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.

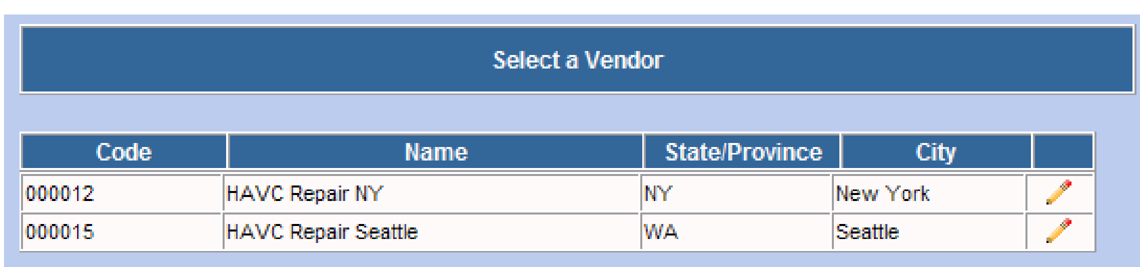
S.8.2 Main Tab

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 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 a Vendor

Code	Name	State/Province	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.

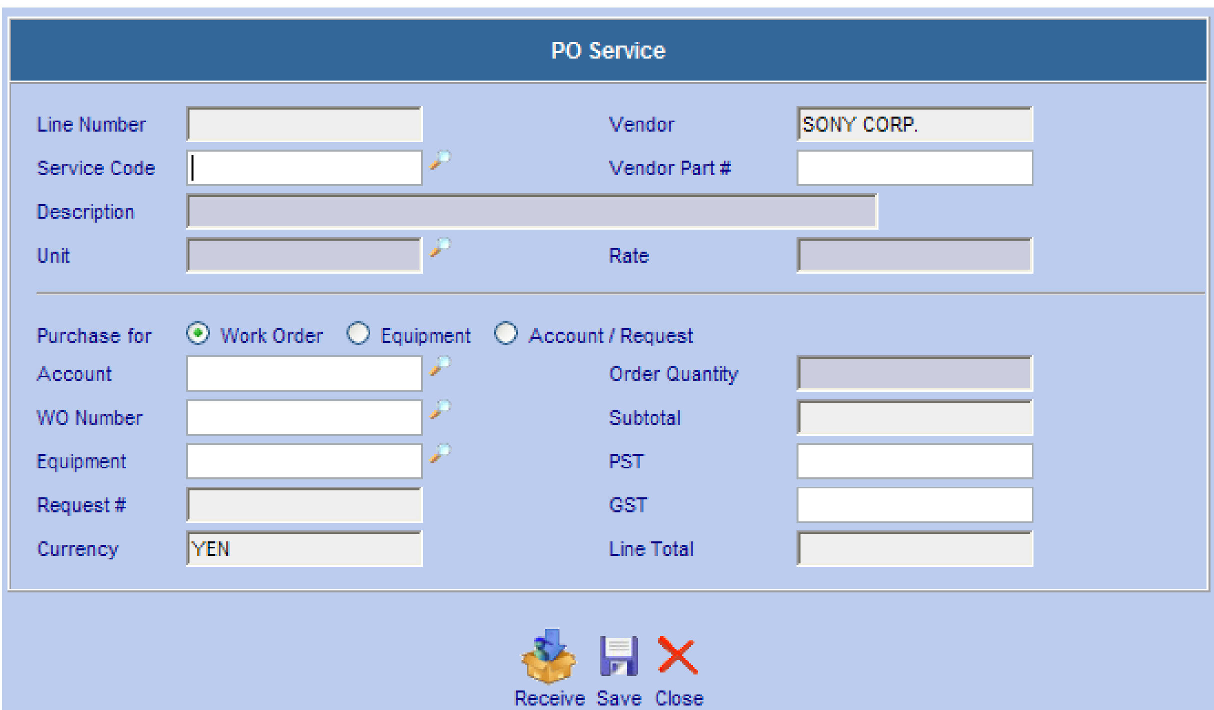
Line Number	ItemNo./Service Code	Item Description	Received Quantity	Order Quantity	Price	Tax1	Tax2	Line Total	Service
1	HB-0001	A to Z inspection Service	0	1	100.00	4.00	5.00	109.00	•
2	000008	Wireless Router	0	10	29.99	12.00	15.00	326.90	
			Subtotal	CND 399.90		16.00	20.00	435.90	

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.

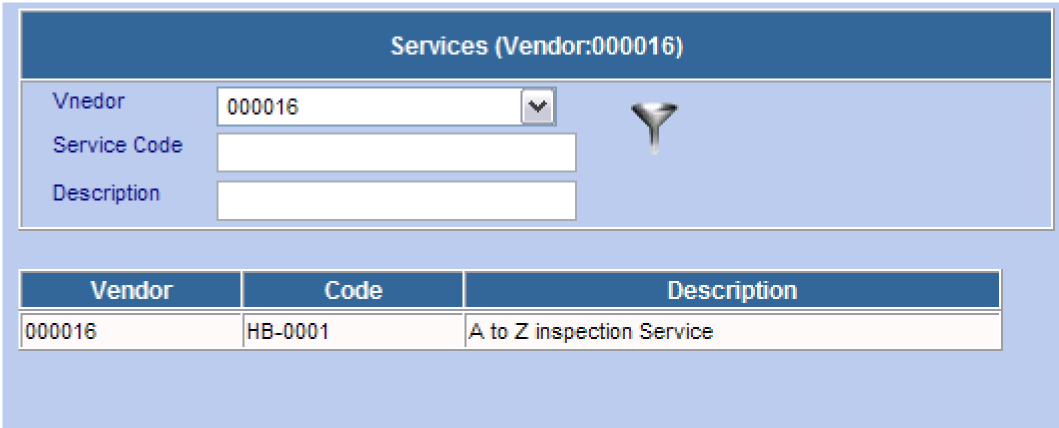
S.8.4 Adding a Service to a PO

To add a Service to a PO:

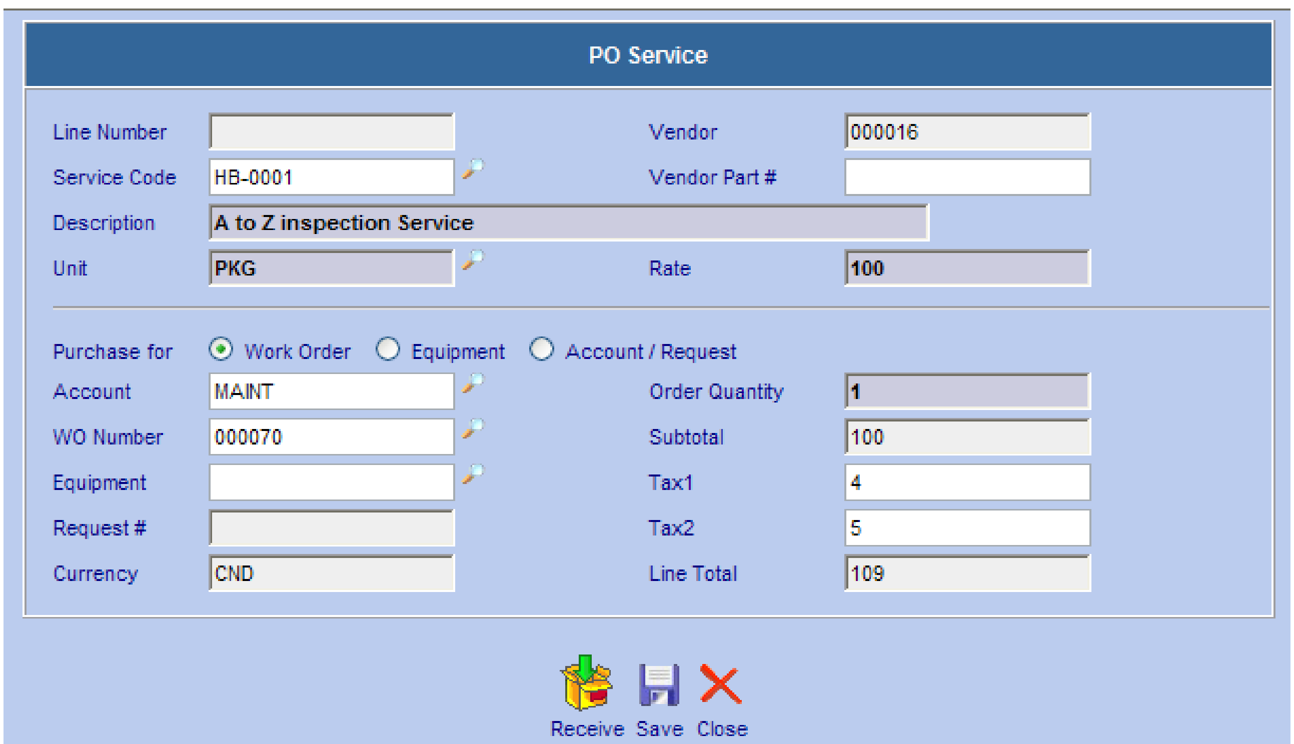
- Click the New Service in the Line Item tab
- The PO Service Screen will open



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



- If any information about the service is known, such as the description, it can be entered into the search fields. Click the filter to filter the services. To see all Services, click the filter 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.

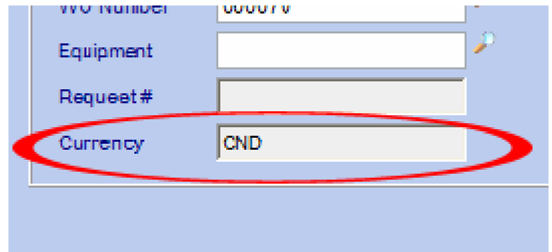


- The Description, unit, and rate fields will be auto filled with information from the service.
- Enter the Order Quantity and the Purchase For information and click save .
- To add a Service that is not listed in the Vendor Services Tab simply fill in the Description, Unit and Rate for the service.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

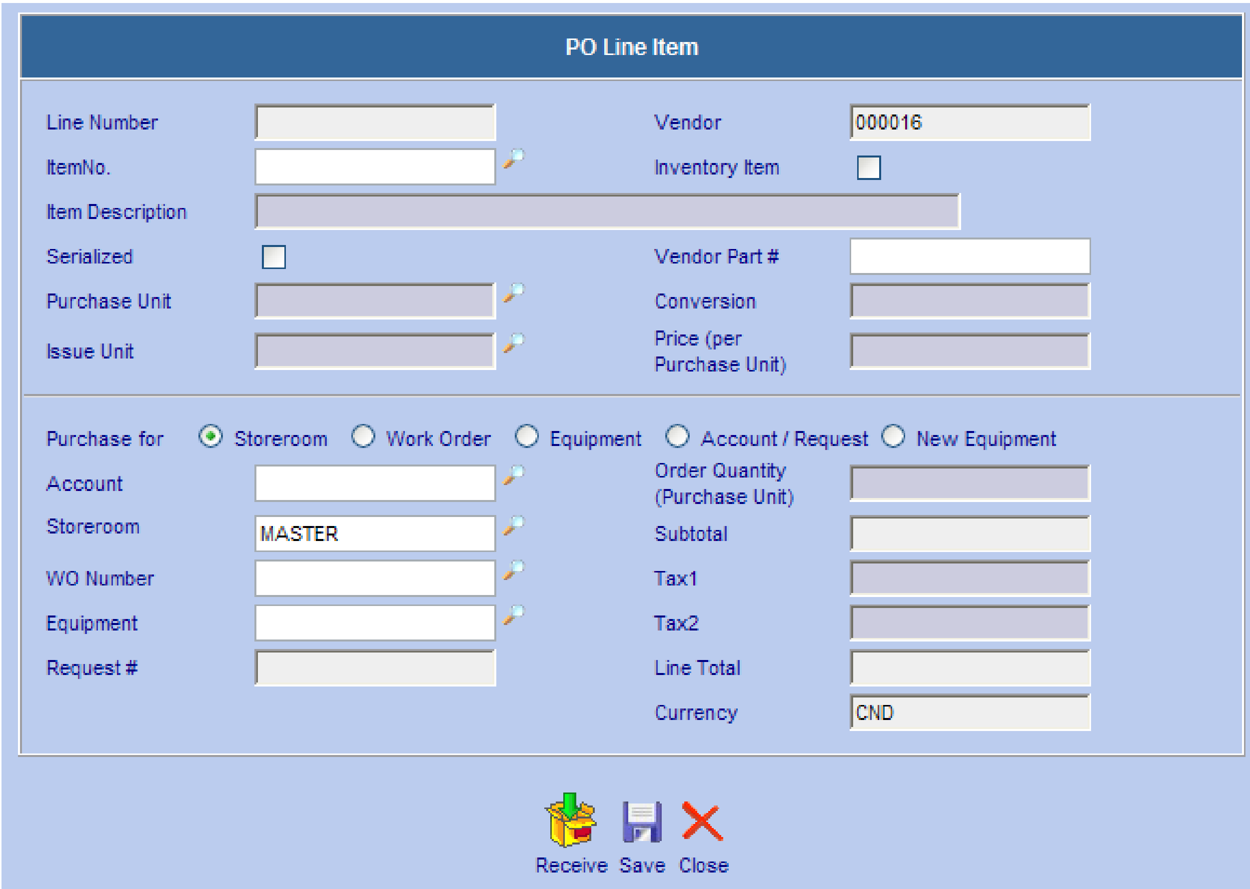
The PO Services Screen also makes use of the new Currency system. The currency of the Vendor is displayed in the Currency field.



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.



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

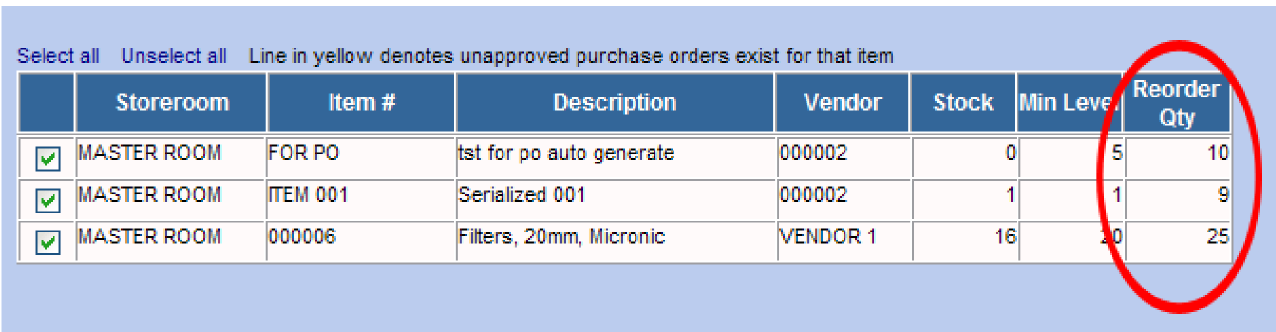
Web Work can now create a PO for a new Piece of Equipment. When the new Equipment is received the user is prompted to enter the appropriate information for that piece of equipment.

- 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.



Select all Unselect all Line in yellow denotes unapproved purchase orders exist for that item

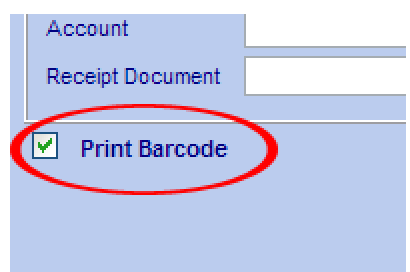
	Storeroom	Item #	Description	Vendor	Stock	Min Level	Reorder Qty
☑	MASTER ROOM	FOR PO	tst for po auto generate	000002	0	5	10
☑	MASTER ROOM	ITEM 001	Serialized 001	000002	1	1	9
☑	MASTER ROOM	000006	Filters, 20mm, Micronic	VENDOR 1	16	10	25

S.8.8 Receiving

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.

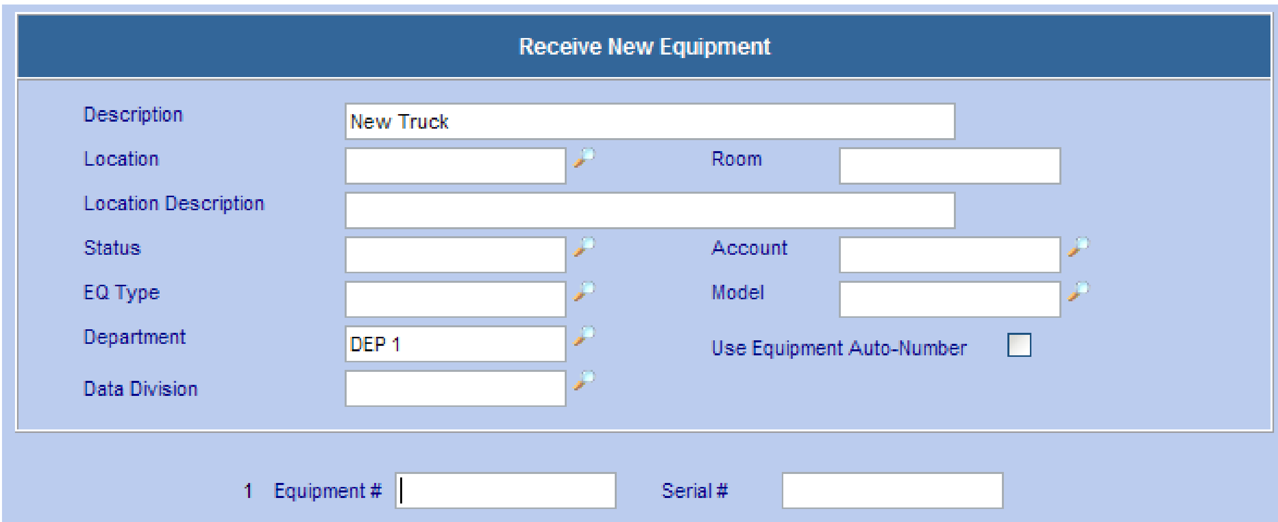
- To print the barcode, place a checkmark in the Print Barcode box in the Order Receiving screen and click .
- A new screen will open with the barcode that is ready for printing.



S.8.9 Receiving a New Equipment PO

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.



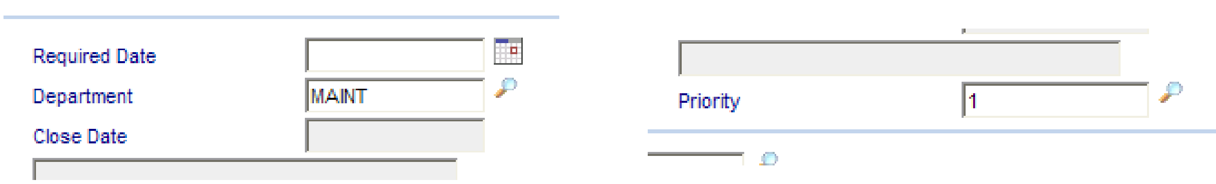
- Fill in any of the needed information.
  - When the Location Field is populated the Location Description will auto populate with the appropriate information.
- By selecting the Use Equipment Auto-Number check box the new equipment will be automatically assigned a new equipment number based on the system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

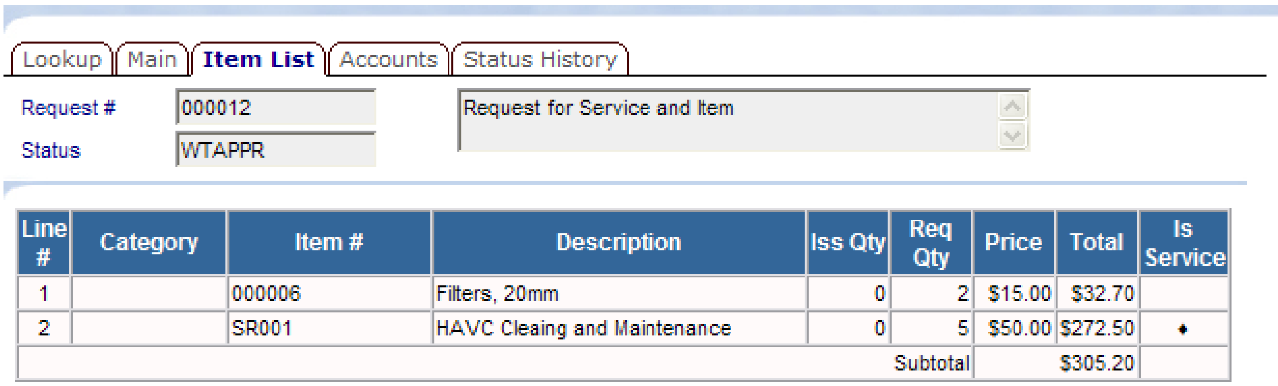
S.8.11 Main Tab

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



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.

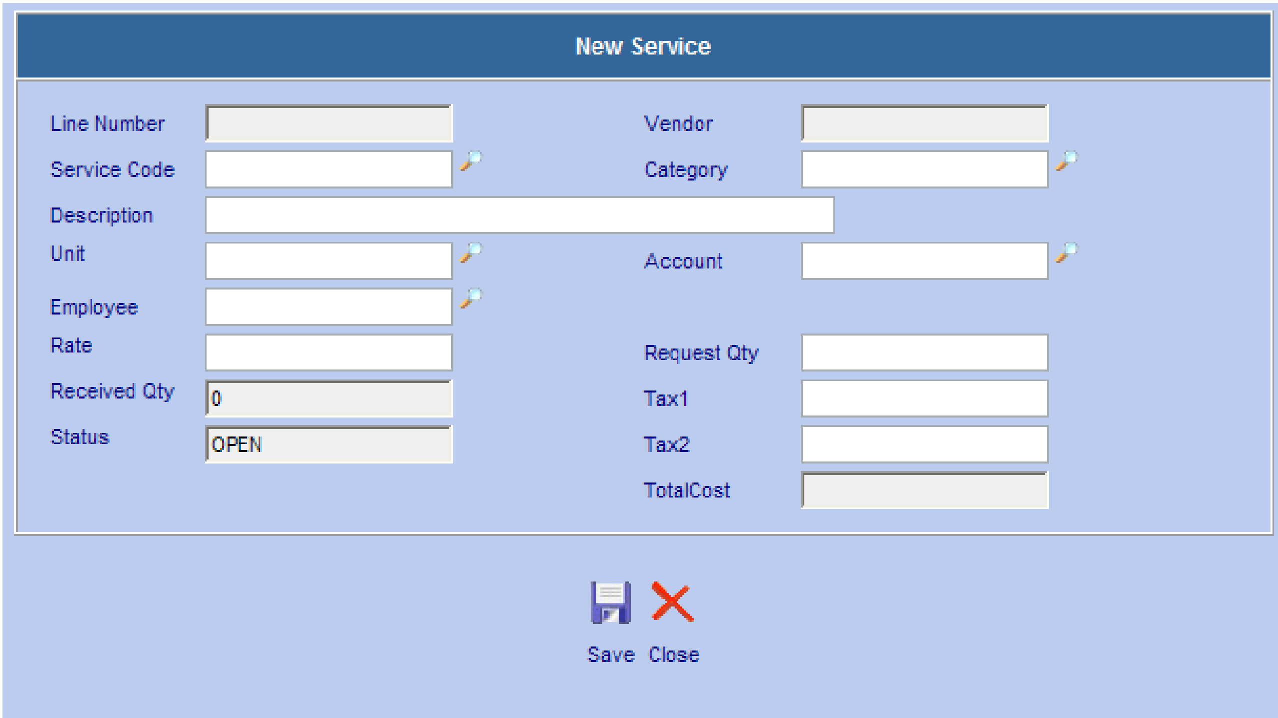


Line #	Category	Item #	Description	Iss Qty	Req Qty	Price	Total	Is Service
1		000006	Filters, 20mm	0	2	$15.00	$32.70	
2		SR001	HAVC Cleaing and Maintenance	0	5	$50.00	$272.50	♦
					Subtotal		$305.20	

S.8.13 Adding a Service to an Item Request

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

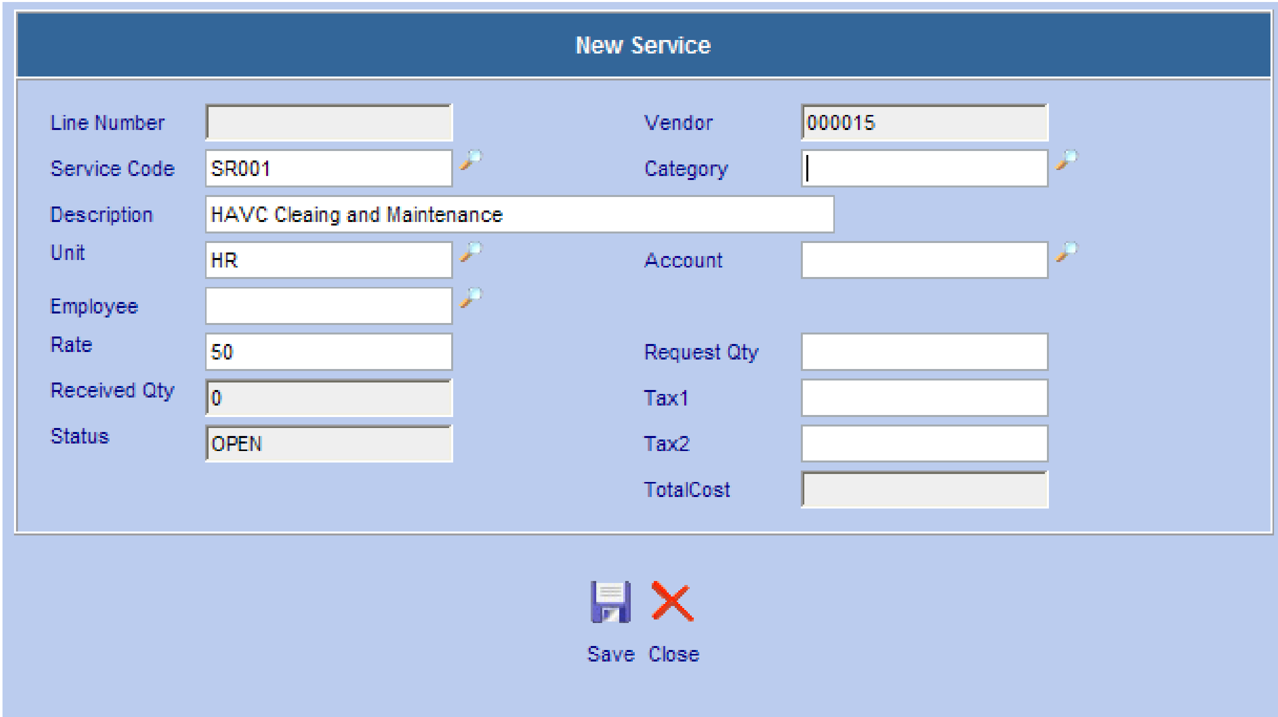
- To add a service, click the new button in the lower right corner of the request screen.
- Once that is clicked a selection menu will appear.
- Chose Service and the New Service screen will open.



- 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 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.

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.

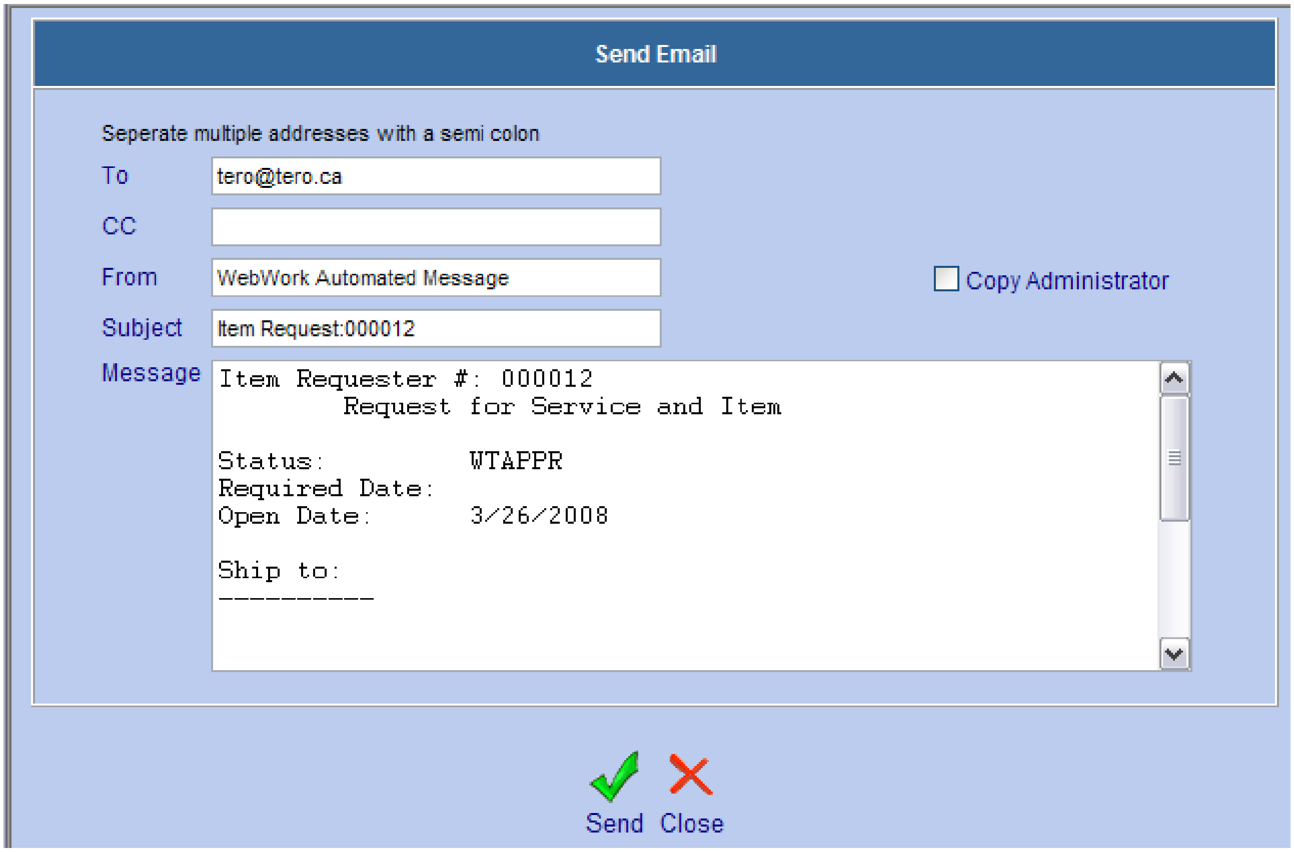


- Fill in the Request Qty and click tab. The Tax1, Tax2 and Total Cost fields will calculate for you.
- Click save and adding a new service to the request is complete.

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 Tools menu and choose Email. The Email screen will open.

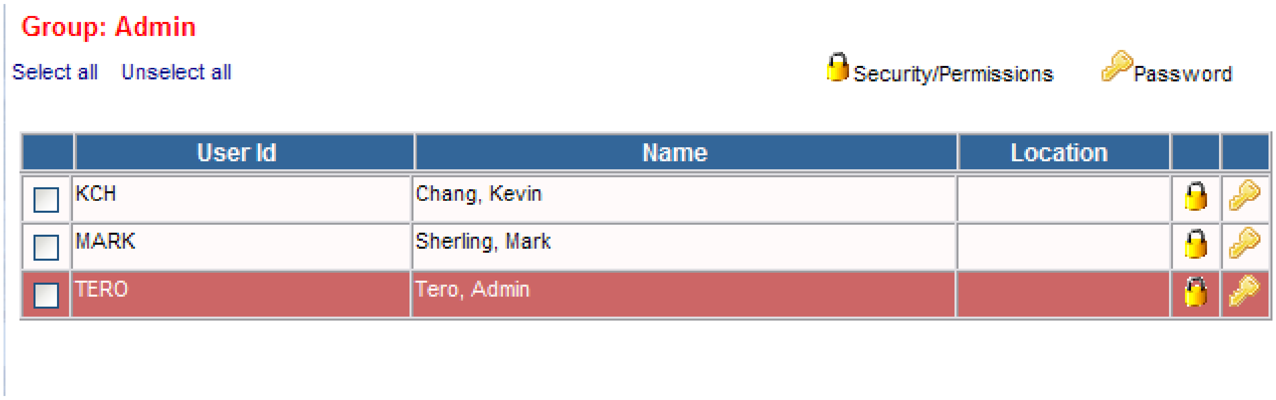


- The "To" field will always default to the email address entered in the labour module for the Requester listed on the Item Request. This email address can be changed to suit the user's needs.
- The message can be edited to include or exclude any information that may need to be edited.
- Once the message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

S.9 Admin

S.9.1 Admin

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



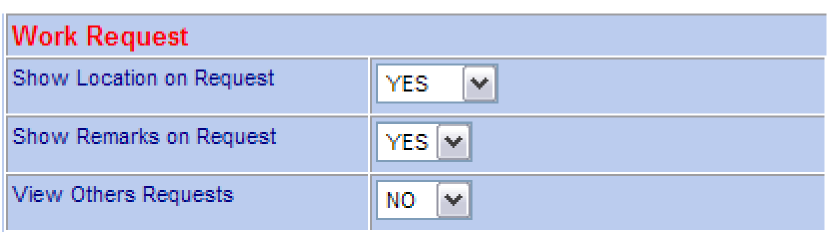
To reset a Users Password click Password in the users' row and the Change Password screen will open. To update a users security and permission settings, click Security in the users' row. This will open the Configure System Security screen for this user.

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



- 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
Use Hierarchy on Equipment Subtypes	YES
Sort Equipment in Numeric Order	NO
Update PM/Procedure Priority when Equipment Priority updated	YES
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

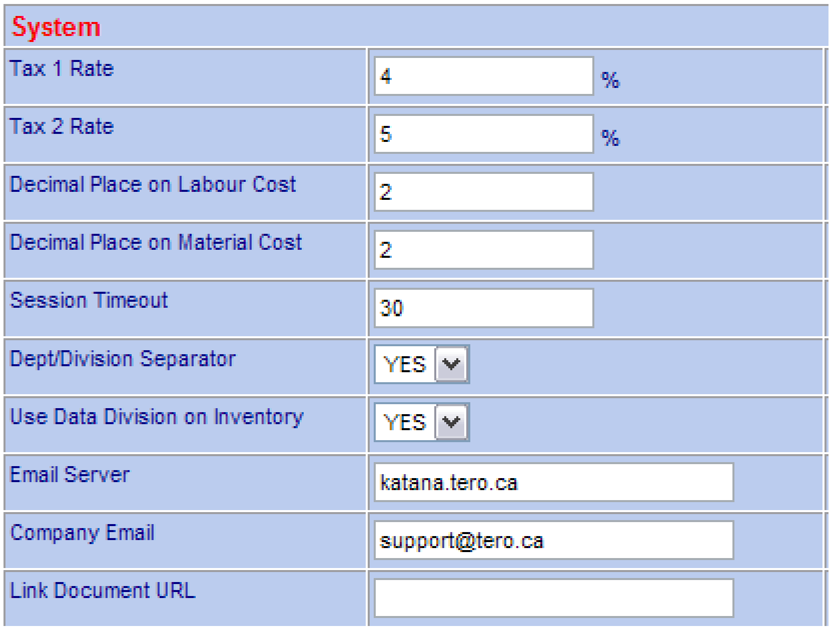
- **PM/Procedure Priority when Equipment Priority is Updated**
- When the Priority field of an equipment record is changed, the user has the ability to choose if the Priority on PMs and Procedures of the equipment record are to be updated accordingly.
- **PM/Procedure Department when Equipment Department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

- **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.

Projects	
Auto Approve Project	NO

- **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.



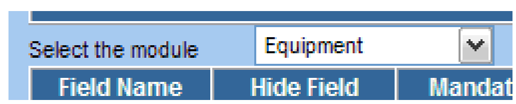
- **Use Data Division on Inventory**
- Determines whether or not Data Divisions are used on Inventory items.

S.9.4 Custom Screen Setup

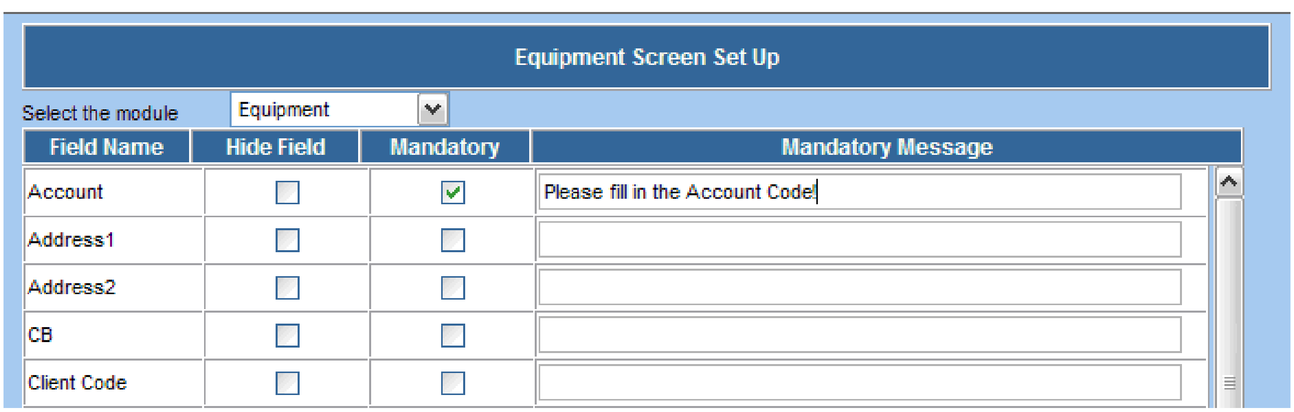
Web Work now allows the user to set custom screen settings for individual module screens. This allows the users to select whether a field is visible or not and can also make a field mandatory.

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.

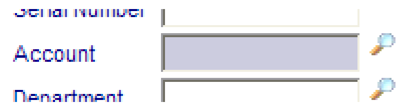


This will list all the fields that are available for editing for that module.



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.

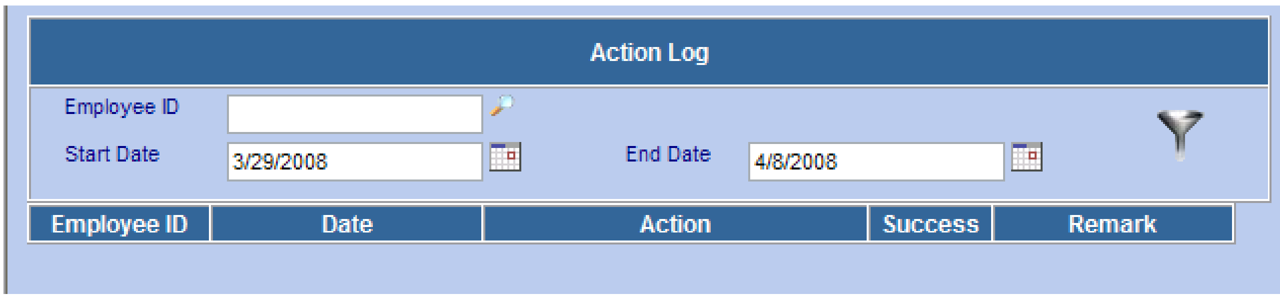
When a field is mark as Mandatory the field colour is turned to grey to match the other mandatory fields.



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

S.9.5 Action Log

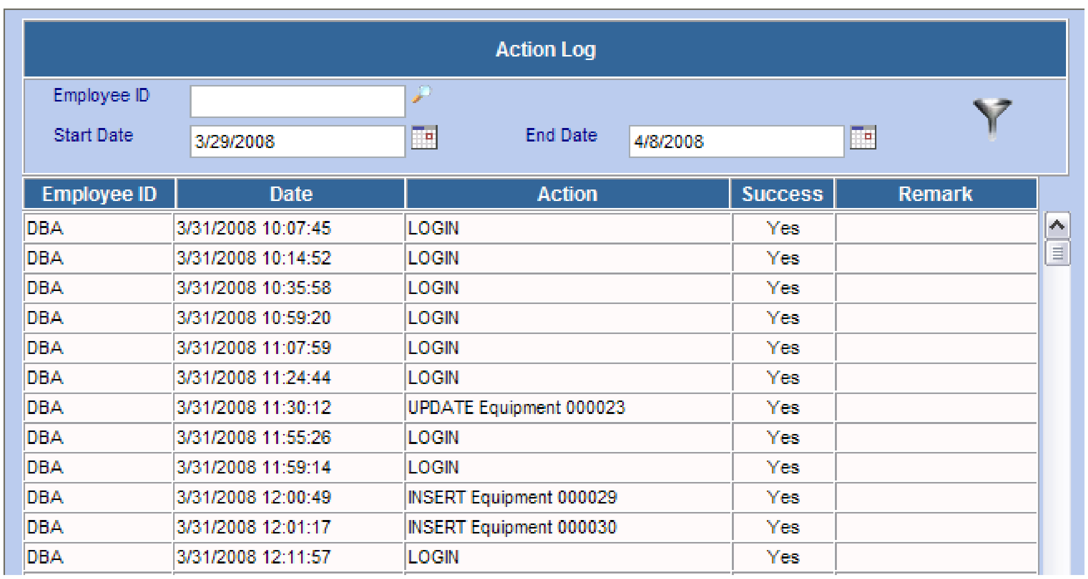
The Action Log is a report designed to let administrators see what each user is doing in Web Work. To access the Action Log the user must be in the Admin Module. Click Tools and then Action Log. The Action Log screen will open.



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.



Employee ID	Date	Action	Success	Remark
DBA	3/31/2008 10:07:45	LOGIN	Yes	
DBA	3/31/2008 10:14:52	LOGIN	Yes	
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 Web 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 fix the discrepancies.

Align Reserves Quantity

Storeroom	Item	Reported Reserves	Actual Reserves

S.9.9 Reports

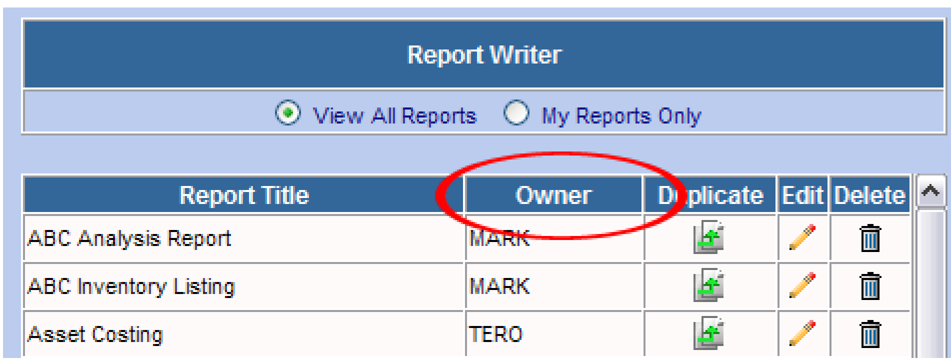
Two new Reports have been added to the Admin Reports. The Fund Recovery Report (Reprint) and the Equipment Hierarchy Report.

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.

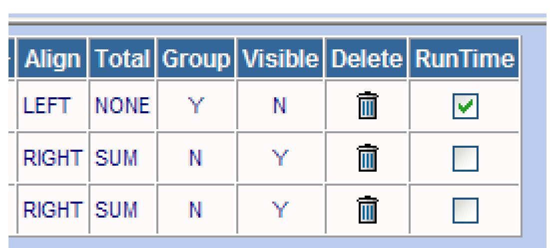


S.9.11 Run Time Filters

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.

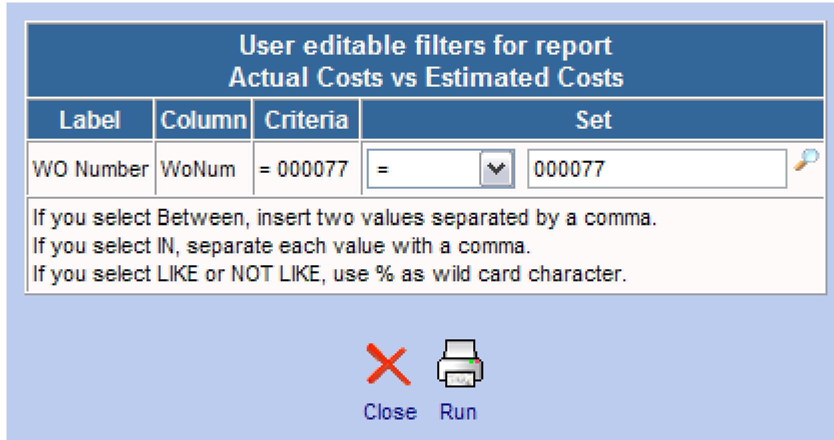
To use Run Time Filters on a report, simply create the report as normal. For the criteria that the user needs to be able to specify, place a check in the check box of the Run Time column.

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.



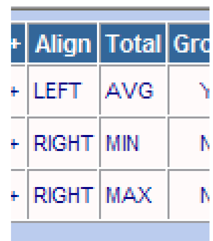
When a user runs the report the Report Filter screen will open. The user will be prompted to enter the appropriate criteria.

Once the criteria is entered, click Print to run the report. The report will open in another window.



S.9.12 <u>New Total Column</u>

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 <u>Min</u>

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.

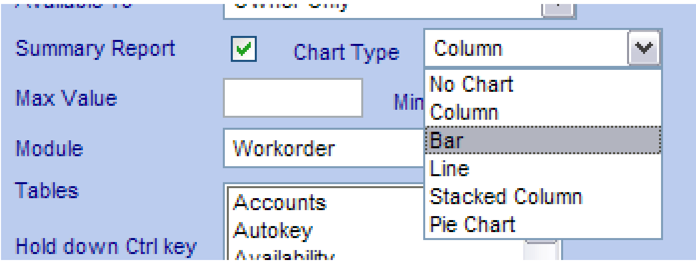
C9.12.1.1.3 <u>AVG</u>

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 <u>Report Graphs</u>

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.



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	% Complete	Budget	Work Order
1	1	Phase 1	3/1/2008	3/31/2008	5%	$50,000.00	
Est Cost: $163.50			Act Cost:$16.35				

WO#	WO Type	Description	Status	Craft	Priority	Target Date	Target End Date	
000012	RM	Test Work Request	APPR		2			

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.

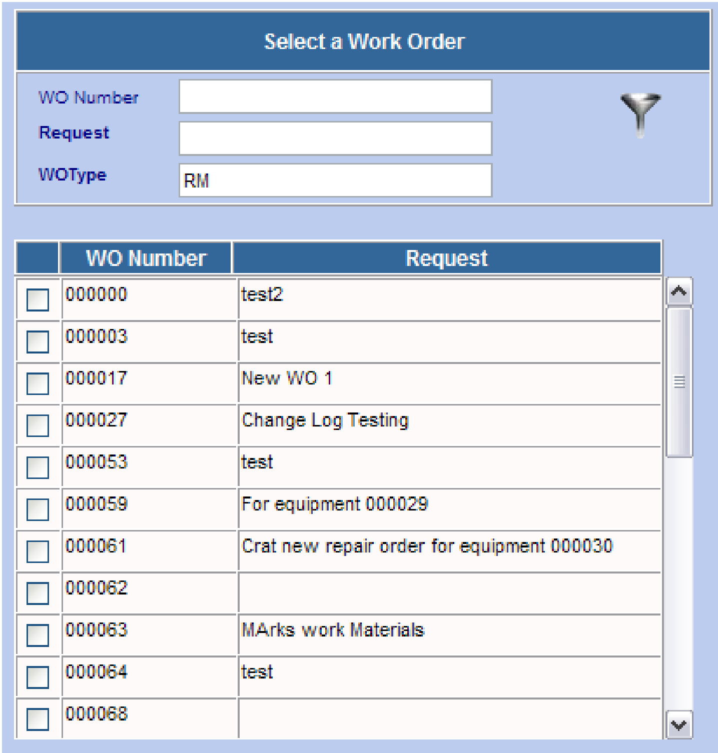
The Estimated and Actual costs are calculated based on the Actuals and Estimates added to Work Orders in the project.

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.



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.

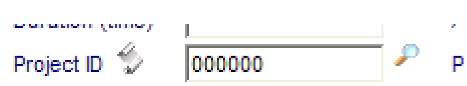
To retrieve and add the Work Orders to the project put a check mark in the check box next to the Work Order number.

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 . This will open the Work Order module and create a New Work Order.

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 next to the Project ID field to return to the Project module. This icon is a direct link from any Work Order that has a Project ID entered.

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 

contains the 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.

- 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 save 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 will bring a "Select Document "popup window.

- Search for documents and then click on the 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 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 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 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 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 

contains the 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.

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 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 save 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  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  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.