

PREFACE

About This Book

The AS/400 CIMS III Work Order Management User's Canadian Guide is intended for management and staff-level users of the Warehouse Module (WHS). The book contains additional "Canadian" feature and instructions for the Work Order Module. It should be used in addition to the standard NCS Warehouse Manuals.

How This Book Is Organized

Each chapter in this book is numbered with the chapter number and page number within the chapter. The Table of Contents lists each chapter by number as well as the chapter subsections. A glossary and index at the end of the book provides you with extra information.

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Last Updated: August 2010

Introduction

This chapter describes how to use the CIMS III Work Order Maintenance module. It also discusses the "flow" of operation and some alternatives of how it may be implemented within your environment.

Refer to previous chapters to assure that the Warehouse General Options and Procedures are in place before implementing Work Order. Refer to the Financial Management User Manual for additional information on how to initially setup G/L accounts and Sub-ledgers necessary for the Work Order Process.

The Work Order system is a "code sensitive" styled set of programs that:

- Captures requests for work to be done (School/Department requests).
- Allows the Maintenance Department to review requests and provide cost estimates for labour and parts.
- Provides opportunity for Requisition Issuer to review estimates and approve the work to be done.
- Aids the Maintenance Department in assigning tasks to requests and scheduling work
- Produces printed Work Orders for tradesman to work from.
- Automatically adjusts account balances, stock inventory and fixed asset costs according to information maintained on the Work Order.

There are various Work Order "states" that determine what information may be completed on the screen, namely;

- REQUISITION (school is documenting the request, Ready to Go has not been done)
- GOTO W/O (school says 'Ready to Go Y' but maintenance has not approved the doc)
- W/O Level1 (request has been approved by maintenance, scheduling has begun)
- COMPLETE (work order work has been completed)

(Optional Steps)

- WAITING ESTIMATE (school has completed request and wants it estimated before Proceeding any further)
- ESTIMATE DONE (request has been viewed by maintenance. An estimate has been done and is awaiting School Approval)

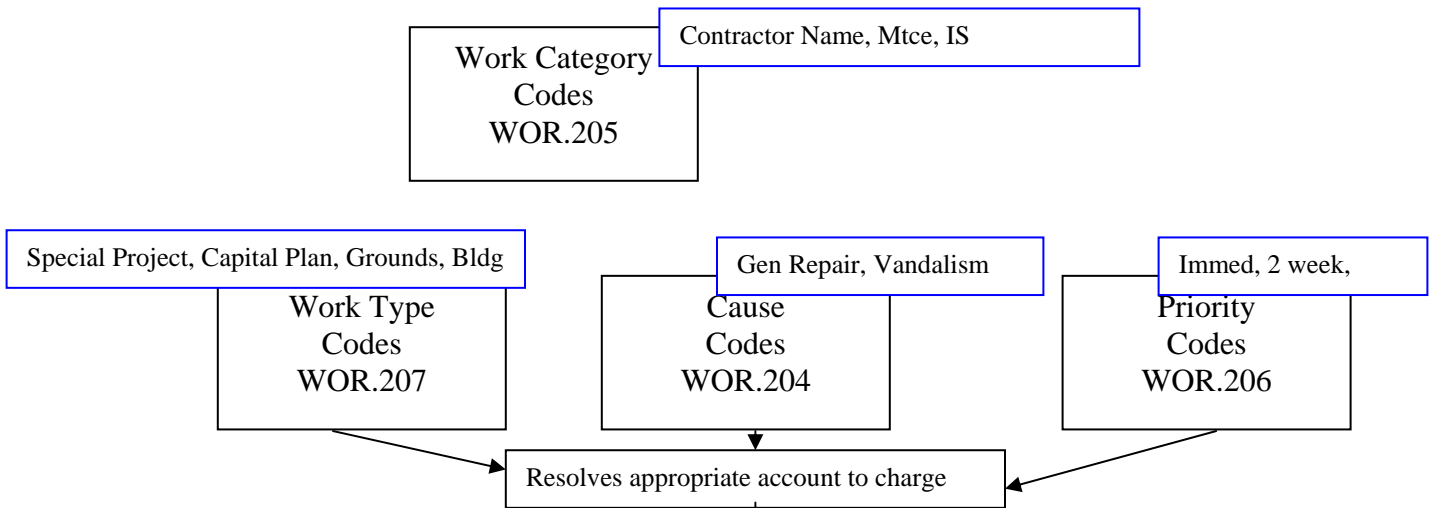
3/21/01 FY 00 DEMONSTRATION SCHOOL DISTRICT 15:27:15 QPADEV0002
 WHS Work Order Index Ref: WOR.401X.02
 Position to:

"X"	DOCID	Number	Status	Locn	Cau	Typ	Pri	Req Date	Required	Est Date
█	W0023	960049	GOTO W/O	023	01	MTC	02	1/30/01	1/30/01	3/20/01
			REMOVE PAINT FROM GYM WALLS					GRD	9.1100.000	3700.23
-	W0023	960065	GOTO W/O	023	RPR		02	2/07/01	2/21/01	0/00/00
			THIS IS THE TEXT LINES					BLD	9.1100.100	7110.23
-	W0023	960067	GOTO W/O	023	RPR	MTC	01	2/07/01	2/09/01	0/00/00
			LINE 1					GRD	9.0000.000	5300.99
-	W0023	960074	GOTO W/O	023	RPR	MTC	03	3/20/01	5/19/01	0/00/00
			TEST W/O ADD					BLD	9.1100.100	7110.01
-	W0023	960075	WAIT EST	023	RPR	MTC	02	3/21/01	4/04/01	0/00/00
			Need new front counter to be built. Need some					BLD	9.1100.100	7110.23
-	W0023	960076	REQUISN	023	02	MTC	03	3/21/01	5/20/01	0/00/00
			New playground structure needs pea gravel ove					GRD	9.1100.000	3200.00
*			--END--					0/00/00	0/00/00	0/00/00

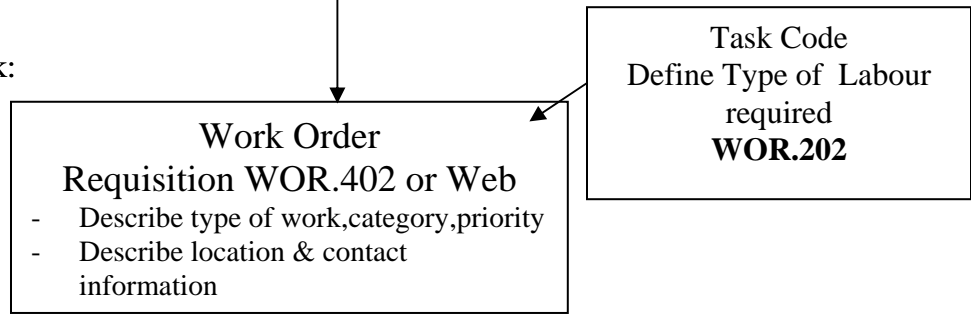
M.A. a 05/003

How Information Flows in WOR

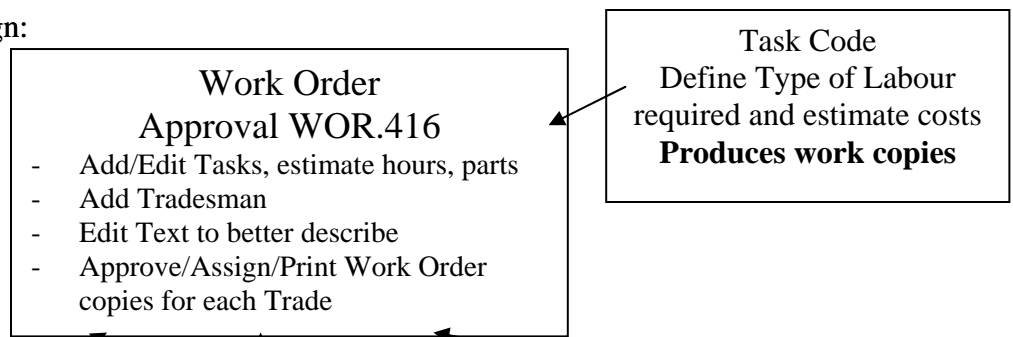
Code Setup:



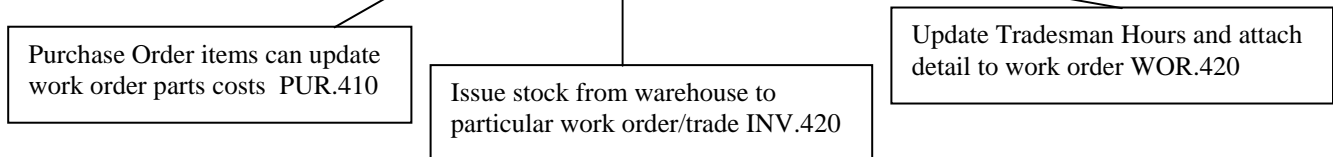
School/Dept request for work:



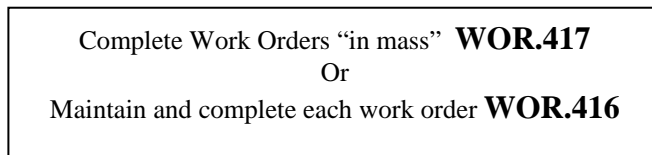
Maintenance Approval/Assign:



Update Parts and Labour:



Complete Work Order:



Work Order Codes - Summary

- (1) WORK CATEGORY CODES (WOR.205) - 3 character code used within each work order to classify the work order for major reporting types (eg: Contractor, Maintenance, IS)
- (2) WORK TYPE (WOR.207) Break workorder into major type of grouping, ie: Capital, Optional .. this has an effect along with Cause to determine appropriate G/L account charges.
- (3) CAUSE CODE (WOR.204) Indicate the nature of why this work order is being generated, ie: General Repair, Vandalism, Preventative maintenance ... An account code (allowing substitution logic for eg: location) is included with the cause.
- (4) PRIORITY CODE (WOR.205) Identify default priority codes/levels and attach (optional) the number of days or date. If days or date are blank, the user may manually indicate when expected required date is. If a priority (eg: Spring break work that has a specific date in it) code has a date or days, the system will automatically update expected work order date based on the priority entered.
- (5) SKILL/TASK CODES - 5 character code used for reporting purposes. Maintenance can potentially breakdown a work order into several tasks. Labour and parts can be assigned to a particular task and reporting can be generated by task. When work order copies are printed, one is printed for each task per work order (eg: Bathroom job may require ELEC, CARP .. electrical and carpenter).

How WOR works with Other Applications

The Work Order System, based on general setup options, may have relationships with the following other CIMS systems:

CIMS Warehouse and Finance:

- Stock issues for parts against a work order will automatically update inventory and charge the part(s) to appropriate G/L according to that work order
- Stock issues for labour charges against a work order will automatically charge the labour to appropriate G/L account(s) according to the work order

CIMS Fixed Asset Module:

- Labour and Materials may be charged against a Fixed Asset (Task) so that fixed asset cost reports per item are available.

CIMS Employee Management System:

- Tradesman Information may link directly to Personnel File.

System Setup and Definitions

The Work Order module follows similar setup and year end-start procedures to all CIMS products:

- 1) Client Member must be setup each year.
- 2) General Code definition and DOCID criteria must be maintained during the year and at yearend
- 3) User MUST decide whether Work Order Parts and Labour Amounts should automatically post to the General Ledger.

WOR.100 - General Setup Options

Setup values must be entered before doing ANY transactions in the fiscal year.

Setup values may be changed at any time during the fiscal year. Default values indicated below appear within each Work Order automatically but may be overwritten. Posting options turn the "FMS interface" on or off for labour and materials.

```

Session A - [24 x 80]
File Edit Transfer Appearance Communication Assist Window Help
PrtScr Copy Paste Send Recv Display Color Map Record Stop Play Quit Clipbrd Support Index
4/16/01 FY 00 DEMONSTRATION SCHOOL DISTRICT 18:44:44 QPADEV0004
CANWHS W/O General Setup Options Ref: WOR.100 .11

Options for Fiscal Year: 2000

Encumber Work Order Requisition Amounts ..... N
Post Work Order Parts Amounts ..... N
Post Work Order Labour Amounts ..... N
Default Work Order Document ID .....
Default PST Tax Percentage ..... 7.00 %
Default GST Tax Percentage ..... 7.00 %
Remit Split: 32.00 % Receive: 68.00 %

Tax Method: 1
1 = PST and GST separate
2 = Include GST in PST Calculation

Mode: Change F3=Exit F5=Reset F12=Cancel
MA a 12/060
Connected to remote server/host SYSTEM1 using port 23

```

Most customers choose 'NOT' to post to the G/L from Work Order because the charge is occurring already:

- When something is purchased, the posting is handled from Purchasing (Purchase Order, Invoice)
- When something is issued from the warehouse, the posting is done from INV.420 stock issues.
- When labour hours are entered in issues, charges are automatically incurred

WOR.205 – Work Category Codes

A Category Code is a 3 digit code used within each work order to categorize the work order in very general terms like CON = contractor, BLD = Building, GRD = Grounds, MTC = General Maintenance. You can break down the CON for reporting purposes to contractor codes.

```
Session A - [24 x 80]
File Edit Transfer Appearance Communication Assist Window Help
PrtScr Copy Paste Send Recv Display Color Map Record Stop Play Quit Clipbrd Support Index
4/16/01 FY 00 DEMONSTRATION SCHOOL DISTRICT 18:53:35 QPADEV0004
CANVHS Contractor Code Maintenance Ref: WOR.205 .11
Contractor Code: BLD Active? Y
FMS Vendor#:
Name : BUILDING
Contact 1:
Contact 2:
Address :
City, Prv:
Postal Code:
Phone: ( ) Ext
Fax: ( )
Misc 1:
Misc 2:
Mode: Change F3=Exit F4=Index F5=Reset F12=Cancel
MA a 03/076
Connected to remote server/host SYSTEM1 using port 23
```

WOR.207 – Work Type Codes

A Type Code is a 3 digit code used within each work order for reporting and account distribution to break up work orders into appropriate types like Optional and Capital.

```
Session A - [24 x 80]
File Edit Transfer Appearance Communication Assist Window Help
PrtScr Copy Paste Send Recv Display Color Map Record Stop Play Quit Clipbrd Support Index
4/16/01 FY 00 DEMONSTRATION SCHOOL DISTRICT 18:55:34 QPADEV0004
CANVHS Type Code Maintenance Ref: WOR.207 .11
Type Code ID: MIC
Description: MAINTENANCE
Mode: Change F3=Exit F4=Index F5=Reset F12=Cancel
MA a 10/020
Connected to remote server/host SYSTEM1 using port 23
```

WOR.204 - Cause Codes

A cause code is a 3 digit code used within work order to describe the reason for the work order eg: VAN = Vandalism, GEN = General Repair, PM = Preventative Maintenance. This is the primary factor in determining the charge account. Substitution logic may be used to substitute the location portion of the account code with Work Order DOCID.

The screenshot shows a terminal window titled "Session A - [24 x 80]". The menu bar includes File, Edit, Transfer, Appearance, Communication, Assist, Window, and Help. The toolbar contains icons for PrintScreen, Copy, Paste, Send, Recv, Display, Color, Map, Record, Stop, Play, Quit, Clipbrd, Support, and Index. The main display area shows the following information:

```
4/16/01  FY 00      DEMONSTRATION SCHOOL DISTRICT      19:00:12  QPADEV0004
CANVHS      Cause Code Maintenance      Ref: WOR.204 .11
Cause Code ID:  04

Description:     PREVENTATIVE MAINTENANCE
Def Account:    1.1100.100.7110.??

Mode: Change      F3=Exit  F4=Index  F5=Reset  F12=Cancel
```

At the bottom of the terminal, it shows "M8 a" and "Connected to remote server/host SYSTEM1 using port 23" with the session ID "07/020".

In the above example, when a work order for location WO023 was completed, the charge would by default be allocated to 1.1100.100.7110.023

WOR.206 - Priority Codes

A Priority Code is a 2 digit code used within each work order to indicate the severity by which work should be done. Priority codes can have default number of days OR a set date. When a user uses a priority code with days/date entered, the Required by date of the work order will automatically fill based on the priority criteria.

The screenshot shows a terminal window titled "Session A - [24 x 80]". The menu bar includes File, Edit, Transfer, Appearance, Communication, Assist, Window, and Help. The toolbar contains icons for PrintScreen, Copy, Paste, Send, Recv, Display, Color, Map, Record, Stop, Play, Quit, Clipbrd, Support, and Index. The main display area shows the following information:

```
4/16/01  FY 00      DEMONSTRATION SCHOOL DISTRICT      19:04:38  QPADEV0004
CANVHS      Priority Code Maintenance      Ref: WOR.206 .11
Priority Code ID:  02

Description:     2 WEEKS
Number of Days:  14
Set Date MDY:    0/00/00

Mode: Change      F3=Exit  F4=Index  F5=Reset  F12=Cancel
```

At the bottom of the terminal, it shows "M8 a" and "Connected to remote server/host SYSTEM1 using port 23" with the session ID "07/025".

WOR.202 - Task Codes

A Task or Skill Code is a 5 digit code used to identify what skill(s) will be required for the work order. All reporting can be done by location or work order OR work order task ... to assist in determining task costs. Work Order copies are also generated for each task.

Session A - [24 x 80]
File Edit Transfer Appearance Communication Assist Window Help
PrtScr Copy Paste Send Recv Display Color Map Record Stop Play Quit Clipbrd Support Index
4/16/01 FY 00 DEMONSTRATION SCHOOL DISTRICT 19:07:34 QPADEV0004
CANVHS Skill Code Maintenance Ref: WOR.202 .11
Skill Code: CAR2
Description: CARPENTRY LEVEL II
Mode: Change F3=Exit F4=Index F5=Reset F12=Cancel
MB a 07/020
Connected to remote server/host SYSTEM1 using port 23

WOR.301 - Tradesman Maintenance

A Tradesman Code is a system generated number used to identify internal labour. Each tradesman contains category and skill codes. Standard Regular and Overtime rates are entered so that default values will automatically appear on work orders. If an EMS Employee# is selected, information will default from the EMS system. If an FMS Vendor# is chosen, default name and address information will appear from the Vendor File.

Tradesmen may be flagged as Active or Inactive. Inactive tradesmen cannot be requested when creating a Work Order.

Emergency information etc. should be reported from the EMS system. You can indicate additional information in notes if required.

Session A - [24 x 80]
File Edit Transfer Appearance Communication Assist Window Help
PrtScr Copy Paste Send Recv Display Color Map Record Stop Play Quit Clipbrd Support Index
4/16/01 FY 00 DEMONSTRATION SCHOOL DISTRICT 19:12:59 QPADEV0004
CANVHS Tradesmen Maintenance Ref: WOR.301 .11
Tradesmen No.: 10
Name (L,F): SMITH HENRY
EMS Employee#: 000910676 FMS Vendor#: _____
Address: 300 - 207 FORT ST.
City, Prv: PORTAGE LA PRAIRIE MB
Postal Code: R315R5
Home Phone: (204) 688-2556 Ext _____
Work Phone: (_____) Ext _____ Fax: (_____)
Category: _____
Skills: CAR4 ELE1
Start Date: 0/00/00 End Date: 0/00/00
Location: 23 SAMUEL BURLAND SCHOOL
Reg Hr Rate: 18.0000
Ovr Hr Rate: 24.0000
Msc Hr Rate: _____
Type: _____
Misc 1: _____
Misc 2: _____
Mode: Change F3=Exit F4=Index F5=Reset F12=Cancel
MB a 03/076
Connected to remote server/host SYSTEM1 using port 23

Work Order Maintenance and Processing

The system accommodates a variety of Maintenance Authorization, Approval and Scheduling of Work methods. It is critical that each installation site determines how to implement the product to fit their environment. Specifically, users must determine what approval stages are necessary, where the input will be done and who will be responsible for the following input/verification/print processes:

1. Initial input of Request for Work to be done
2. Providing Estimates for incoming requests
3. Approving Estimates
4. Appending Work Order Parts, Labour Requirements
5. Scheduling Work Order and Approving start Dates
6. Initiating the Work, distributing work to be done
7. Verifying Work, costing and updating online information
8. Complete and close Work Order

WOR.402 - W/O Requisition Maintenance

This maintenance screen is used by requesters' of work to be done to:

- a) Input and Edit requests for work to be done.
- b) Indicate that a request is ready for estimate
- c) Approve estimates so that requisition may become active (Optional)
- d) Review the progress, costs, completion notes of a Work Order

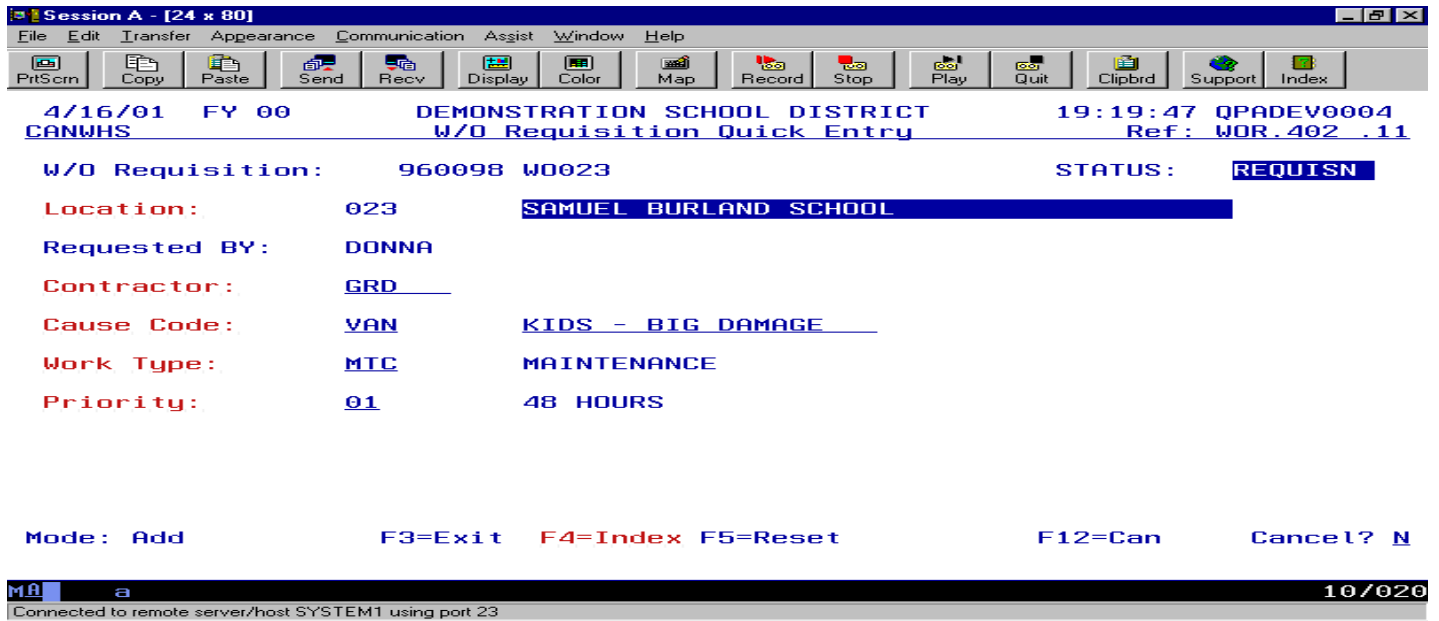
Once a requisition has been approved by maintenance, the requisitioner will have only LOOKUP access. The only time requisitioner's can edit work orders is until they reach a status of 'WO LEV1'.

Requisitioner's can:

- print their own work order copy,
- review the status and costs at any time (active, complete)
- report on overall school activity and cost by type, charge account, or task

The purpose of the Work Order module is to assist both the requisitioners and maintenance department in handling and reporting on work to be done.

Based on identification of work category, reason, and priority, additional information will be presented to the requisitioner:



W/O NUMBER: The System generates a requisition number based on the DOCID created within the FMS system

STATUS: The Status of the requisition appears at the top right of all header screens. Fields of input are allowed according to status.

LOCATION: Location defaults based on the user restriction. Additional space is available within the work order to further indicate exact location within the building.

REQUESTED BY: Auto-fills with the USERID who inputted the request

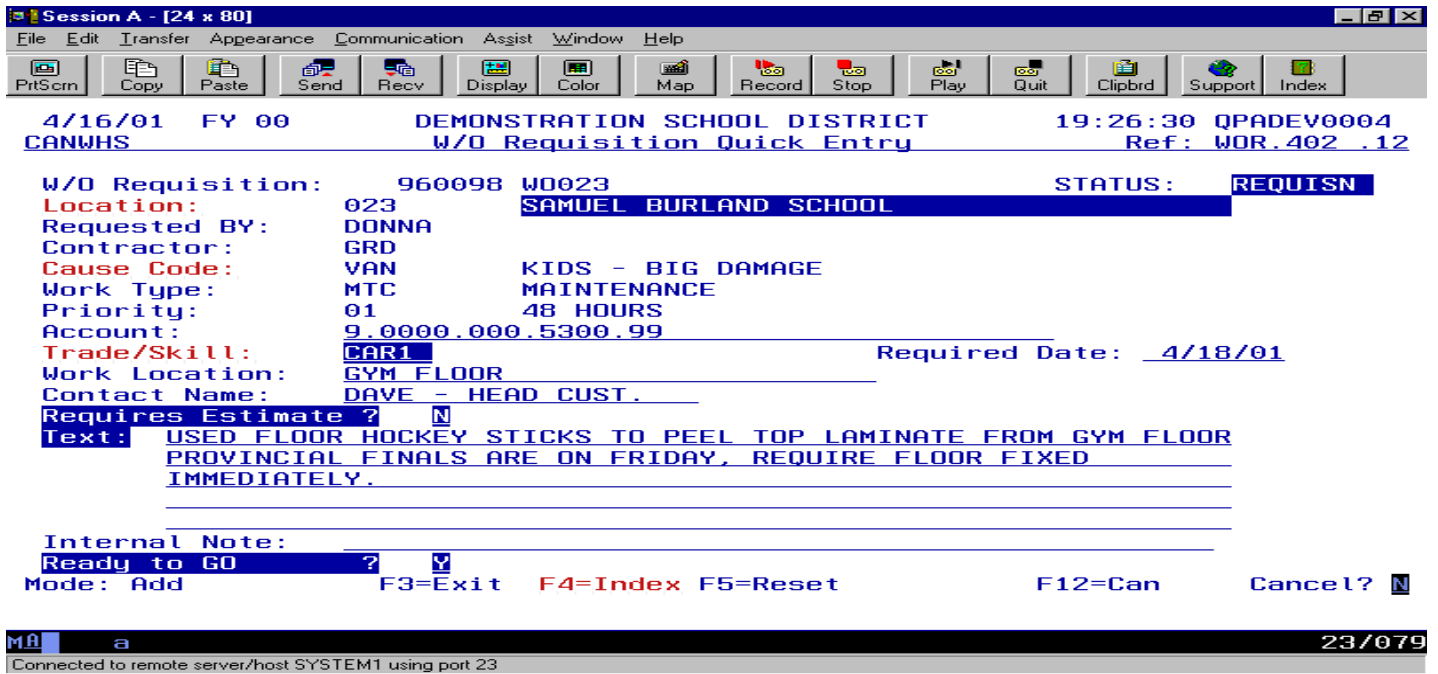
CONTRACTOR CODE: Indicate Work Category type (WOR.205)

CAUSE CODE: Indicate cause or work order (WOR.204)

WORK TYPE: Input to the best of your knowledge work type (WOR.207)

PRIORITY: Indicate the priority you wish to place on the work order

Based on resolution of this information (priority code, cause code), an additional screen will appear.



- ACCOUNT: Auto-fills based on cause code. User can edit if required.
 - TRADE/SKILL: User can identify (if known) what skill or task he feels is required.
 - WORK LOCATION: Describe in detail where work is to be done
 - CONTACT: Identify who should be contacted within the location regarding this problem
 - REQUIRE ESTIMATE: If you prefer an estimate before proceeding with the work order input 'Y' and this will kick off an additional ESTIMATE / APPROVE ESTIMATE process between maintenance and the requisitioner.
 - TEXT: Describe the work to be done clearly and completely. The better this input, the larger the likelihood of work to be done quickly and correctly the first time.
 - READY TO GO: Maintenance will NOT review the order until this has been flagged 'Y'
- User will return to the 'A'dd, Change, 'E'nd screen. Use 'P'rint to create a copy of the work order request for your files (if necessary).

Work Order Requisition Entry – Web

Work Order requisitions can be entered by either the office or directly from the Custodian. If custodians are involved we recommend that the setup be done right through EmployeeConnect, ie:

- custodian signs into EmployeeConnect and the AdminConnect button is preset (from PRO.100)
 - custodian selects AdminConnect and the Finance tab is available with no additional sign in required. This prevents the custodial staff needing to know yet another USERID and password!
- A user does not have to have AdminConnect Admin Y in order to be able to input work order requests. They must simply have access to appropriate Woxxx docids.
 - If a user has access to >3 Woxxx docids we assume that user to be a super user and will allow them to change requests on the web regardless of status. Restricted users can edit work order requests only until they are approved.

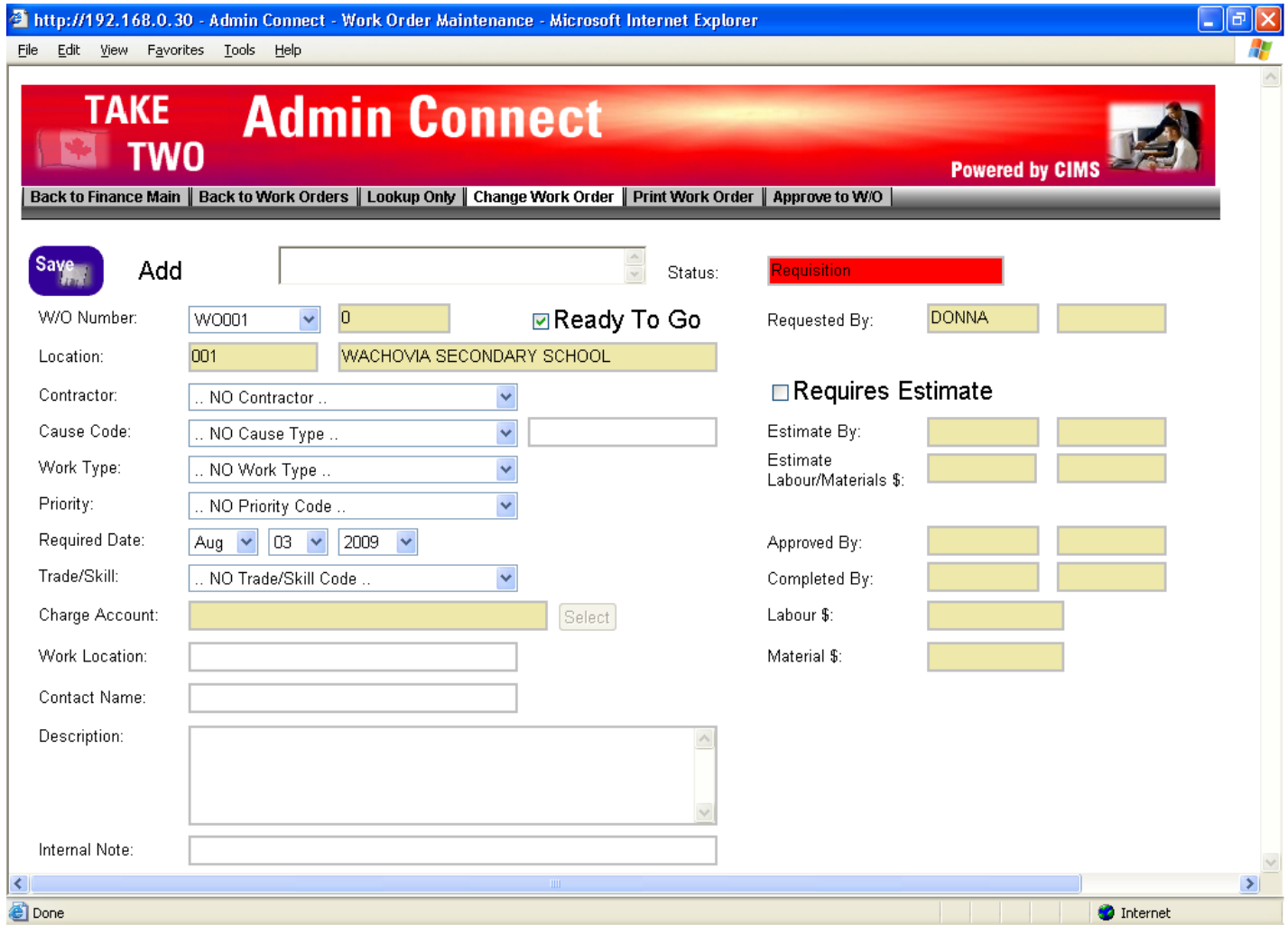
The screenshot displays the Admin Connect web application interface. The top navigation bar includes 'Student Management', 'Financial Management', 'Staff Management', 'Help', and 'Logout'. The main content area shows a list of work order requisitions with columns for 'Status', 'Work Order', 'Date', 'Location', 'Type/Cause', 'Description', and 'Account'. Below this, a detailed view of a work order is shown, including fields for 'Add', 'W/O Requisitions', 'Active Work Orders', 'Waiting for Estimates', 'Completed/Closed', 'Go To Work Orders', 'W/O Date', and 'All W/Os'. The detailed view includes a table with columns for 'Select', 'Status', 'Work Order', 'Date', 'Location', 'Type/Cause', 'Description', and 'Account'.

Select	Status	Work Order	Date	Location	Type/Cause	Description	Account
Select	Go To Work Order	WO001 100012	Req: 06/02/10	01	REPAIR 01000000133000 EQUIPMENT REPAIRS/OFFICE	Front door glass is cracked. Glass must be replaced.	01000000133000
Select	Waiting for Estimate	WO001 100003	Req: 06/25/10	001 GYM	GROUPS WORK (FIELDS/OUTDOOR) 01870000591??? extra MAINTENANCE PAYS	Need lights changed in gym ceiling - special equipment requi red to get up to the roof. REQUIRE: Bulb 40W Part# eer345	01120000711002 01120000711002
Select	Go To Work Order	WO001 100014	Req: 07/19/10	01 East Side of School, park lot	GROUPS WORK (FIELDS/OUTDOOR) 01870000591??? Extra Details MAINTENANCE PAYS	Grass is super long on side of East side of school beside th e parking lot. Please make sure that someone takes care of his this week as we have a school BBQ on July 31st.	01870000591??? 01870000591??? 01870000591???

A list of currently unapproved work orders appears (by default). This will let the enduser know right away what has not been processed by maintenance.

From this screen endusers can:

- a) Limit what to show and view/print any work order! If you want to see everything completed for your location, <click> on just completed/closed. If you want to see all active work orders, <click> on active work orders. Note that you can also start showing from a particular date/month.
- b) <Select> on any entry to view and/or print the work order
- c) <Add> a new work order request



Ready to Go: Must be checked in order for this work order to show for maintenance. If you are just preparing the request and do not wish to forward to maintenance yet - <uncheck> Ready to go

Require Estimate(Optional): Leave this blank unless your district has selected to operate in this environment

W/O NUMBER: The System generates a requisition number based on the DOCID created within the FMS system

STATUS: The Status of the requisition appears at the top right of all header screens. Fields of input are allowed according to status.

REQUESTED BY: Auto-fills with the USERID who inputted the request

CONTRACTOR CODE:	Indicate Work Category type (WOR.205)
CAUSE CODE:	Indicate cause or work order (WOR.204)
WORK TYPE:	Input to the best of your knowledge work type (WOR.207)
PRIORITY:	Indicate the priority you wish to place on the work order. The required date will Autofill based on priority code for those codes that you have defined to x days.
ACCOUNT:	Auto-fills based on cause code. User can edit if required.
TRADE/SKILL:	User must identify what skill or task he feels is required.
WORK LOCATION:	Describe in detail where work is to be done
CONTACT:	Identify who should be contacted within the location regarding this problem
DESCRIPTION:	Describe the work to be done clearly and completely. The better this input, the larger the likelihood of work to be done quickly and correctly the first time.
INTERNAL NOTE:	This text may be used for information between you and maintenance not to be Recorded in description. This field is rarely used.

**** CRITICAL: The Work Order is nowhere until <Save> is selected.**

- User will a Work Order Saved successful message AND a work order number will be displayed.
- Use the <Print Work Order> tab to print a copy for yourself (optional)
- If further adjustments are needed to the work order request – go ahead and make the changes <SAVE>

WOR.416 - Work Order Maintenance

This option is used to:

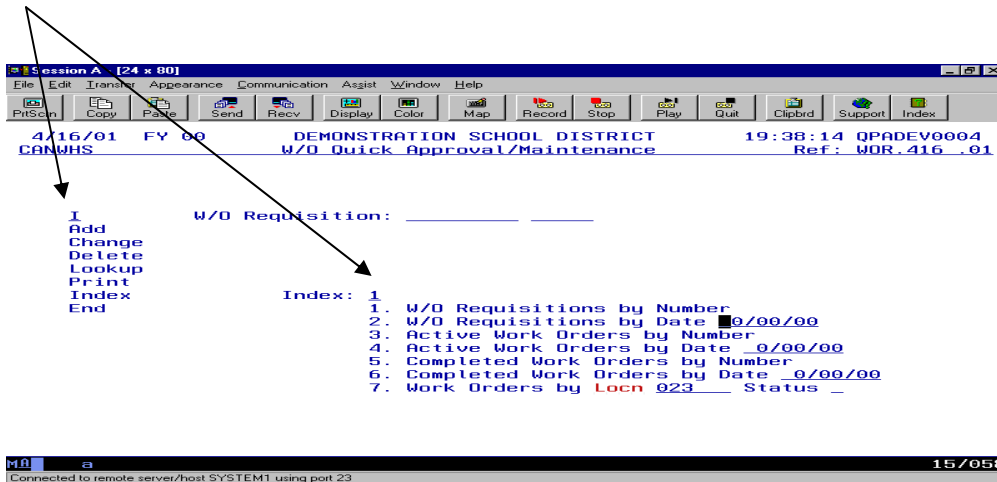
- 1) Initiate then maintain Work Orders
- 2) Flag Work Orders as Complete and Close Encumbrances
- 3) At any time review work order status'

WOR.416 is not the only option that will allow maintenance to update the Work Order Parts/Materials and Labour Information:

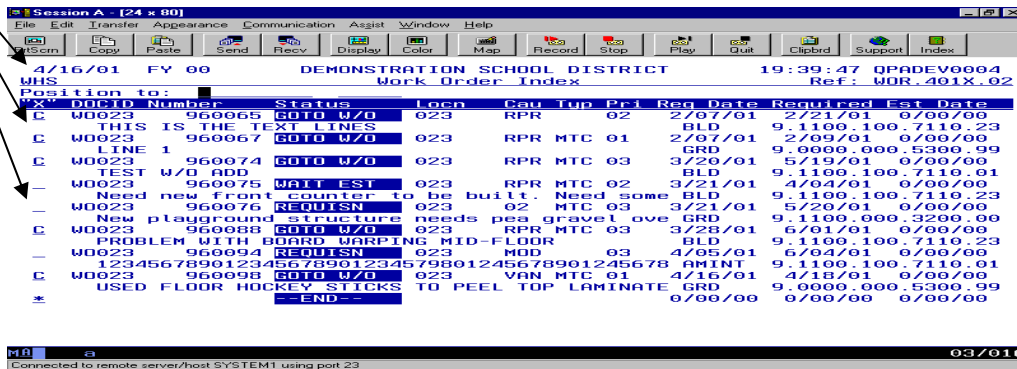
- Work Order Parts can automatically be updated from Purchase Order Maintenance
- Work Order Parts can automatically be updated from stock issues
- Work Order labour can automatically be updated from stock issues (labour hours)
- Work Orders can be completed "in mass" using WOR.417

The screen was designed so that work order requests can be reviewed and approved online. There is NO need to print requisitions, review, assign on paper, then provide to clerical for input. The steps are as follows:

a) 'Index for all requisitions or select by Date or DOCID

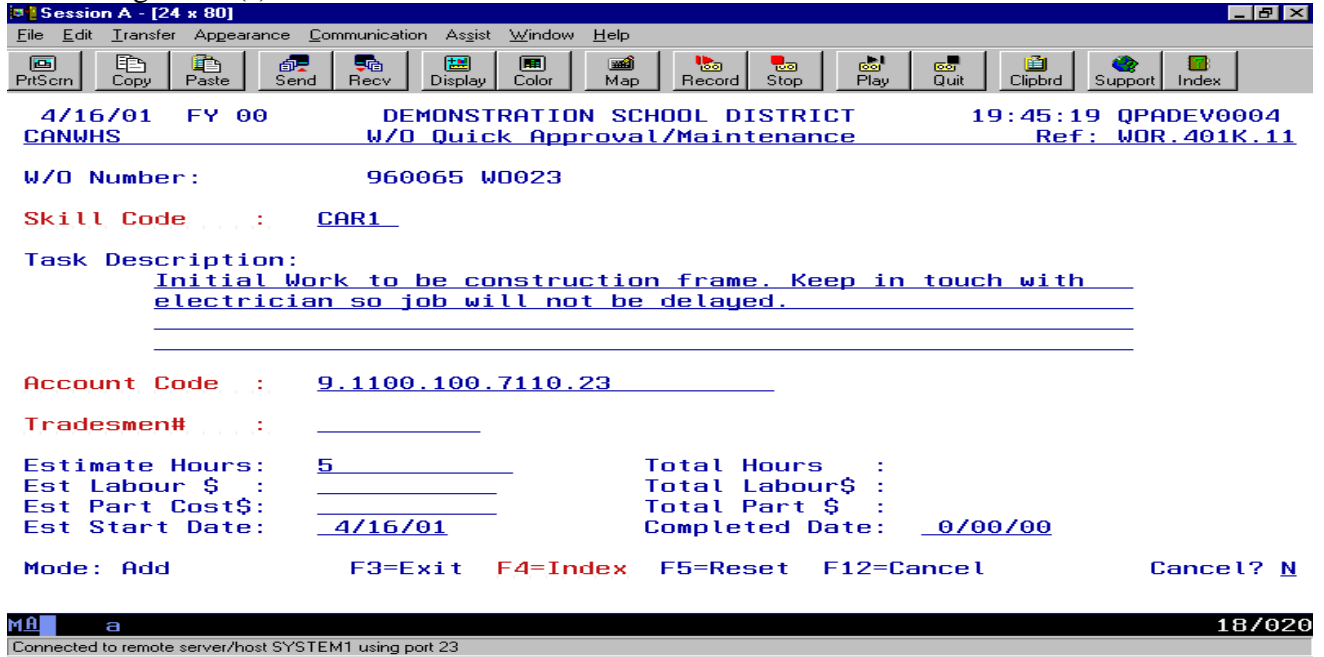


b) Mark all requisitions ready to 'GO TO W/O' with a 'C' change. This will allow you to automatically advance through each request and approve (or not).



- c) For each request,
 - Update Priority, require date, account code information if necessary
 - Update Text Information if necessary
 - Use F6 to assign Task(s) and task notes. The first task becomes the lead hand. You can assign an unlimited amount of tasks to an individual work order

F6 = Assign Task(s)

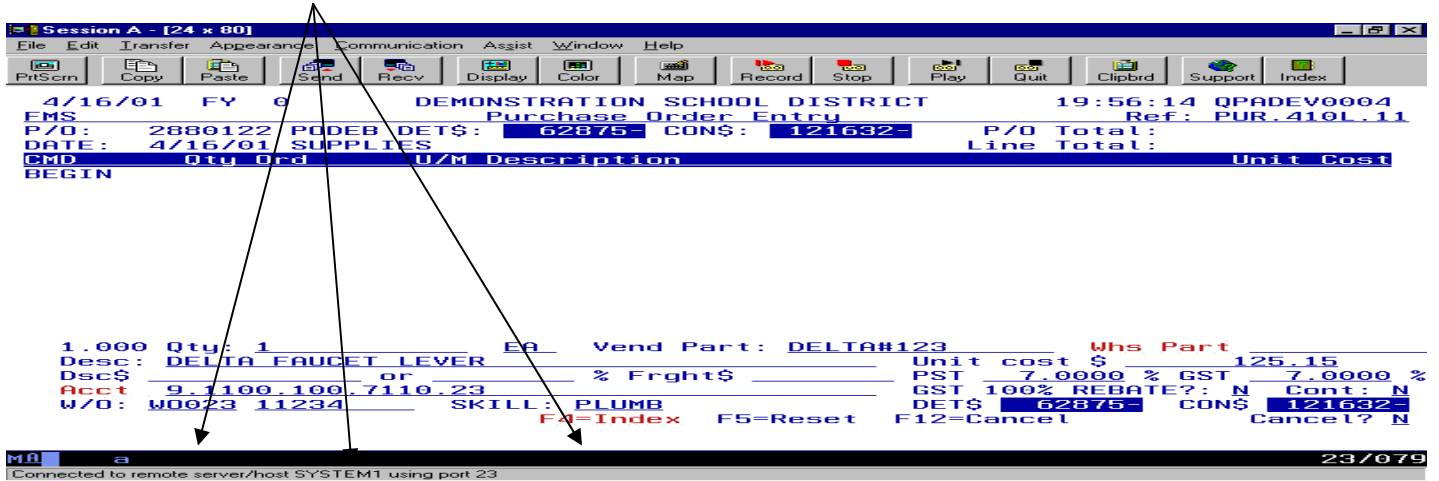


- a) Indicate Task/Skill Code
 - b) Indicate description notes
 - c) Provide estimate hours and costs (if appropriate)
 - d) Provide estimate start date information (if appropriate)
- Use F13 to approve the request to become an active work order and produce work order print(s) = a master copy for the office, and a copy for each task
 - The next work order according to your 'C's will automatically appear. Use F12 to cancel out of the process

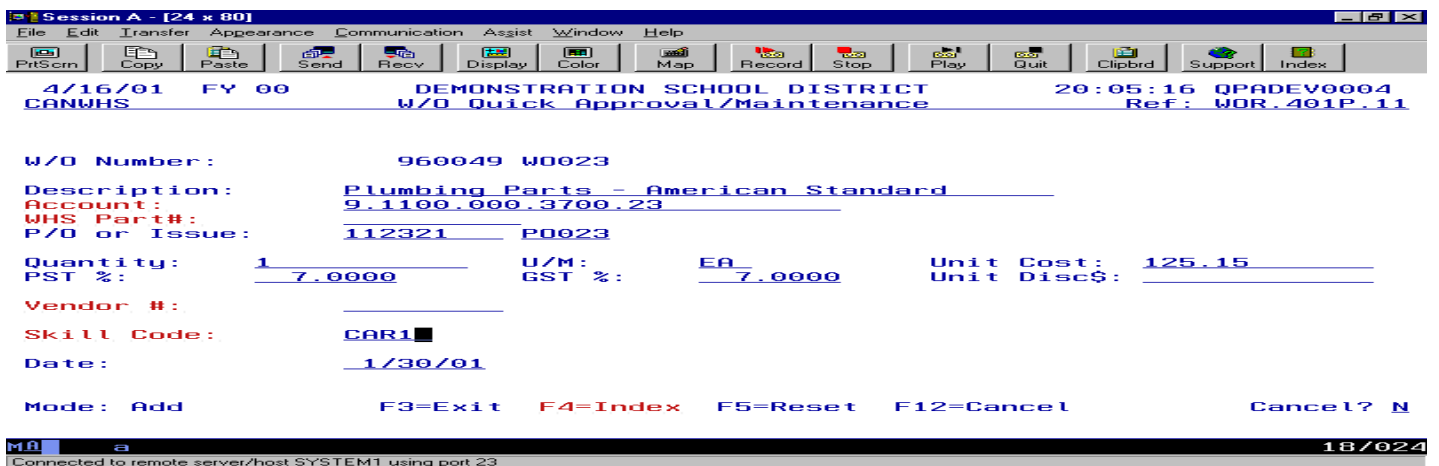
PUR.410 – Update Work Order Parts

When completing a purchase order, maintenance can identify what work order and skill to apply the item towards. The system will NOT automatically supply what account should be charged. If changes are made to the purchase order information regarding the work order charge will have to be made within the work order, ie: the work order charge line appears only on 'A'dd of a purchase order line.

It is far more efficient to 'catch' work order parts charges at purchasing rather than to indicate this painfully line by line within each work order (WOR.416).



WOR.416 – Update Work Order Parts



Information can be maintained line-by-line within WOR.416, work order maintenance. In this scenario, user can input as much (or little) information as necessary. Skill code, description, charge account, quantity, and unit cost are mandatory. Any input done here has NO effect on the G/L.

INV.420 – Update Work Order Parts or Labour Hours from Warehouse Stock

When the warehouse is issuing stock to tradesman, the work order and task can be associated to the part. This will automatically update the work order with parts information and charge the appropriate accounts in the G/L. In addition to the work order and task information, the warehouse MUST be given a charge account. This can be found on the task copy of the work order.

4/16/01 FY 00 DEMONSTRATION SCHOOL DISTRICT 20:02:49 QPADEV0004
 WHS Stock Issues Ref: INV.420L.11
 Issue Number: 42 ISU Line Total: .00
 CMD Stock Item Quantity Unit Cost Amount
 BEGIN

Line: 1.000 Stock Item: 51367
 Quantity: 10
 Account: 9.1100.100.7110.23 Department: _____
 Pst Desc: JIM WORK ORDER Extra: _____
 WrkOrder: W0023 11231 Skill: CAR1 Labour/Materials: M

F3=Exit F4=Index F5=Reset F12=Cancel
 F12=Exit Position cursor to desired Code More...

MA a 16/029
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Special Note: Some districts have defined their tradesman in warehouse stock items (INV.310). This makes it easy and effective to assign tradesman hours to work orders and charge G/L where appropriate. If charges are not incurred, then WOR.420 should be used instead.

WOR.420 – Update Work Order Labour Hours

This item is effective in quickly assigning tradesman hours to work orders. No G/L account posting is performed.

4/16/01 FY 00 DEMONSTRATION SCHOOL DISTRICT 20:16:57 QPADEV0004
 CANWHS W/O Labour Maintenance by Tradesmen Ref: WOR.420L.11

W/O Number: 960065 W0023 4.000
 Tradesmen#: 5 GRABOWSKI DEB
 Hours: 2.0000 Overtime (Y/N)?: Y
 Rate: 18.1000 Total \$: 36.20
 Account: 9.1100.100.7110.23
 Skill Code: CAR1 CARPENTRY LEVEL I
 Date Completed: 4/16/01
 Cause Code: RER REPAIR
 Type: _____
 Mode: Change F3=Exit F4=Index F5=Reset F12=Cancel Cancel? N

MA a 10/020
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Input number of hours, whether overtime is applicable, and the skill code. All other information will default from the tradesman (rate) and work order (account)

Total number of hours is displayed at the top of the screen to be used for balancing/reconciling to the tradesman timesheet.

WOR.417 – Mass Complete Work Orders

There is no accounting reason to close a work order .. but it is our recommendation to close work orders when completed. A closed work order should contain:

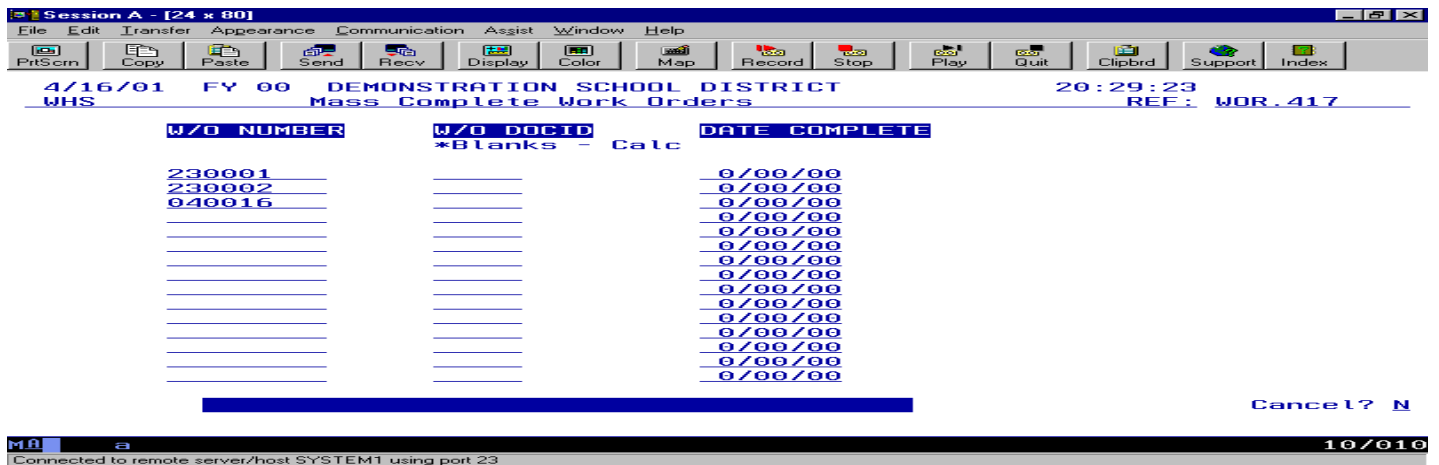
- information on when each task was completed
- complete parts and labour information

By completing the work order:

- work order reporting will be better as reporting can be done by type
- work orders will be more manageable as completed work orders will not appear in the running list of open items

Work orders can be closed individually using WOR.416. In this scenario, input a completed date and/or use F15 to complete the work order. Physically the only activity that occurs is a work order status change.

Work orders can be completed ‘in mass’ using WOR.417. In this option,



- If no date is inputted, today’s date will be used as the completion date
- If no DOCID is input, the system will attempt to resolve the DOCID based on standard work order rules (ie: location code numbering at the start of each numbering sequence)

Work Order Reporting

WOR.552 – Work Order Listing

User can select a location or all locations, can limit to work order type OR date range, can include all work order detail or selected. This report can be utilized at the school level to report on open work OR completed work. It can be utilized by Maintenance for the same purposes.

```

File . . . . . : QWOR552
Control . . . . :
Find . . . . . :
..2.....3.....4.....5.....6.....7.....8.....9.....0.....1.....2.....3.....4.....+
DEMONSTRATION SCHOOL DISTRICT
Active Work Order Listing
Date Range 1/01/30 12/31/29 W/O# Range 999999999
-----
eq Date W/O Date W/O By Completed Status Cs Ty Skill Pr No. Hours $ Parts Description
-----
2/14/01 3/28/01 DONNA 0/00/00 W/O LEV1 07 MTC CAR1 03 3.0000 36.5700 Repair floor, wall and baseboard
2/21/01 4/16/01 DONNA 0/00/00 W/O LEV1 RPR MTC CAR1 02 THIS IS THE TEXT LINES
5/27/01 3/28/01 DONNA 0/00/00 W/O LEV1 RPR MTC 03 NEED NEW COUNTER TOP FOR FRONT LAB S
4/07/01 4/05/01 DONNA 0/00/00 W/O LEV1 RPR MTC 01 TROUBLE WITH UNIT #123456789 DISKET
*****
Number of Work Orders: 4
Total Hours: 3.0000
Labour Total $: 28.2000
Part Total $: 36.5700
*****
Number of Work Orders: 4
Report Total Hours: 3.0000
More...

F3=Exit F12=Cancel F19=Left F20=Right F24=More keys
    
```

Report breaks and sub-totals by location and provides summary information on number of work orders as well as cost breakdown.

WOR.561 – Work Order Listing – By Tradesman (Labour)

User can select a tradesman, can limit to work order type OR date range, can include all work order detail or selected. This reporting is for maintenance to appreciate the number of work orders and cost by tradesman.

```

File . . . . . : QWOR561
Control . . . . :
Find . . . . . :
2.....3.....4.....5.....6.....7.....8.....9.....0.....1.....2.....3.....4.....+
DEMONSTRATION SCHOOL DISTRICT
Completed Work Order Labour Listing
Date Range 0/00/00 0/00/00 W/O# Range 999999999
-----
Tradesmen 1 999999999
Work Order W/O Date W/O By Completed Status Cs Ty Skill Pr Hours Description
-----
W0023 960049 3/23/01 DONNA 4/16/01 COMPLETE 01 CUS1 02 1.0000 N REMOVE PAINT FROM GYM WALLS
Number of Work Orders: 1
Tradesmen Total $: 1.0000
Tradesmen Total Hours: 15.1000
W0023 960049 3/23/01 DONNA 4/16/01 COMPLETE 01 CAR1 02 1.0000 N REMOVE PAINT FROM GYM WALLS
W0023 960053 2/01/01 DONNA 3/20/01 COMPLETE RPRHTCCAR1 03 2.0000 N REPAIR FILE CABINET
Number of Work Orders: 2
Tradesmen Total Hours: 3.0000
Tradesmen Total $: 36.1000
More...

F3=Exit F12=Cancel F19=Left F20=Right F24=More keys
    
```

Report breaks and sub-totals by tradesman and provides summary information on number of work orders as well as cost breakdown.

WOR.894 – Work Order Analytical Reporting

Maintenance will use this report to summarize activity per location (DOCID). Report can be selected by date range, DOCID, and work order type (Active, Completed). A single line is presented per DOCID that identifies in summary how much work and of what type and cost is associated to that DOCID.

Session A - [27 x 132]

File Edit Transfer Appearance Communication Assist Window Help

PrtScrn Copy Paste Send Recv Display Color Map Record Stop Play Quit Clipbrd Support Index

Display Spooled File

File : QWOR894 Page/Line 1/2
 Control : Columns 1 - 130
 Find :
 * 1 2 3 4 5 6 7 8 9 0 1 2 3
 PROG - WOR.894 DEMONSTRATION SCHOOL DISTRICT
 DATE - 4/17/01 Active Work Order Summary
 TIME - 7:35:10 Date Range 1/01/00 12/31/29 W/O# Range 999999999

Work Order	Hours	\$ Labour	\$ Parts	CAR1	CAR2	CAR3	CAR4	CAR5	CUS1	CUS2	CUS3	CUS4	CUS5	ELE1	OTH
W0023	3	28.20	36.57	2											
W0026	15	526.60	632.70						12	3					
	18	554.80	669.27	2					12	3					

F3=Exit F12=Cancel F19=Left F20=Right F24=More keys Bottom

03/022
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Work Orders – To record Bus/Vehicle Maintenance

A maintenance DOCID can be setup and you can utilize the work order module to record and report on bus & vehicle maintenance activity:

The screenshot shows a terminal window titled "Session A - [24 x 80]" with a menu bar (File, Edit, Transfer, Appearance, Communication, Assist, Window, Help) and a toolbar with icons for PrintScreen, Copy, Paste, Send, Recv, Display, Color, Map, Record, Stop, Play, Quit, Clipbrd, Support, and Index.

The main content of the terminal displays the following information:

```

4/17/01  FY 00      DEMONSTRATION SCHOOL DISTRICT      07:41:43 QPADEV0002
CANWHS      W/O Requisition Quick Entry      Ref: WOR.402 .12

W/O Requisition:  50002 W0005      STATUS:  REQUISN
Location:         005      MAINTENANCE
Requested BY:    DONNA
Contractor:      BUS15
Cause Code:      GM      GENERAL MAINTENANCE
Work Type:       BUS      BUS WORK
Priority:         01      48 HOURS
Account:         9.1100.100.7110.01
Trade/Skill:     MECH      Required Date: 4/19/01
Work Location:
Contact Name:
Requires Estimate ?  N
Text:  RE-ALIGN FRONT TIRES.
Internal Note:
Ready to GO      ?  Y
Mode: Add      F3=Exit  F4=Index  F5=Reset      F12=Can  Cancel? N
  
```

At the bottom of the terminal window, there is a status bar showing "MA a" on the left, "23/079" on the right, and "Connected to remote server/host SYSTEM1 using port 23" at the very bottom.

Additional Type codes can be setup. Each vehicle is defined in WOR.207. A special vehicle cost report has been created WOR.559.