Work Order

Application Training – User Guide

Version 24.x
Last Modified 24.1 | April 2024

Technical Support

AssetWorks provides several ways to connect with the Customer Support team. Be prepared to provide detailed information to the representative. If you are reporting an issue by email, include screen shots of your problem. This will provide the Customer Support representative with the information needed to respond quickly and effectively.

Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

Telephone: 1-610-225-8300

Email: M5Support@AssetWorks.com

Website: Community.AssetWorks.com

The support website can be used to open issues, subscribe to user groups and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

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Contents

1. Overview

⚠ This guide will provide a basic introduction to work order processing in M5 along with some of the setup and system settings that can affect work order functionality.

⚠ Certain aspects of this document will overlap with things covered in the *Workflow Application Training User Guide*, but this is intended to be a deeper dive into work order processing specifically as opposed to the other functions that feed into work order processing.

⚠ For a review of things like incidents and work requests and the various aspects of the application that ultimately lead to work orders, please refer to the *Workflow Application Training User Guide*.

2. What is a Work Order?

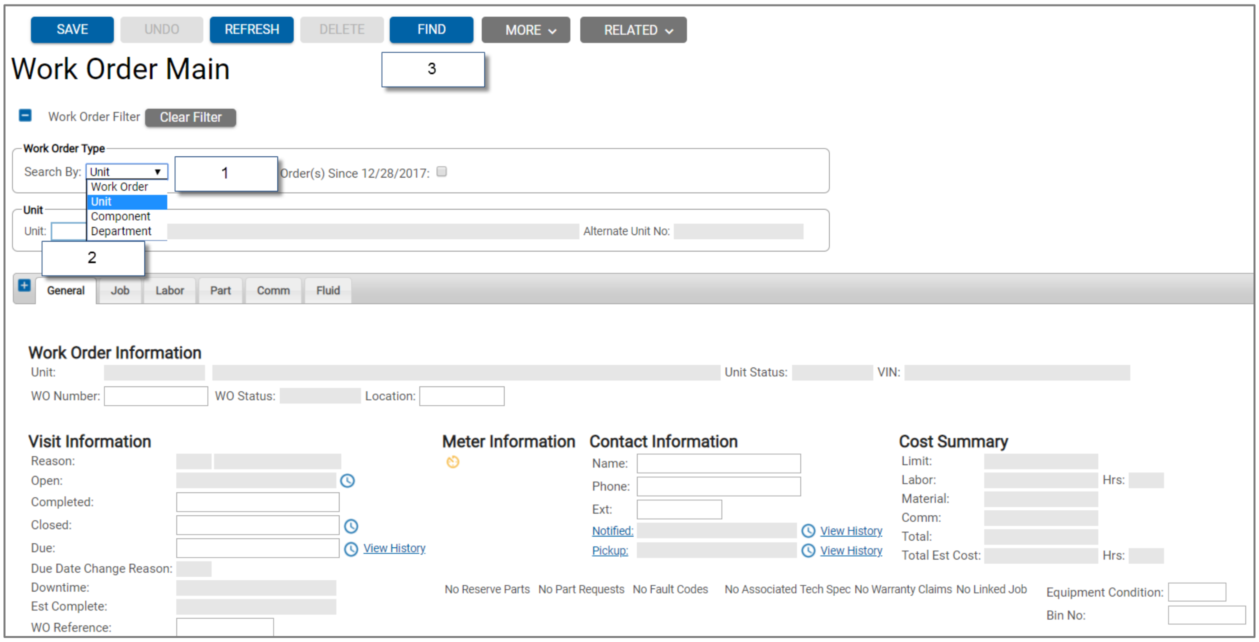
A work order is used to record information and data related to maintenance and work performed for units, departments, and components within a fleet organization. The work order is the "lifeblood" of the M5 FleetFocus™ application.

Work Order processing is the indispensable method by which much of the fleet organization's valuable data is recorded. From meter readings and downtime to billing and usage information, the work order process captures much of the data necessary to ensure a successful fleet operation.

3. Creating a Work Order

There are three different types of work orders in M5: Unit, Component, and Department.

Creating a Unit Work Order

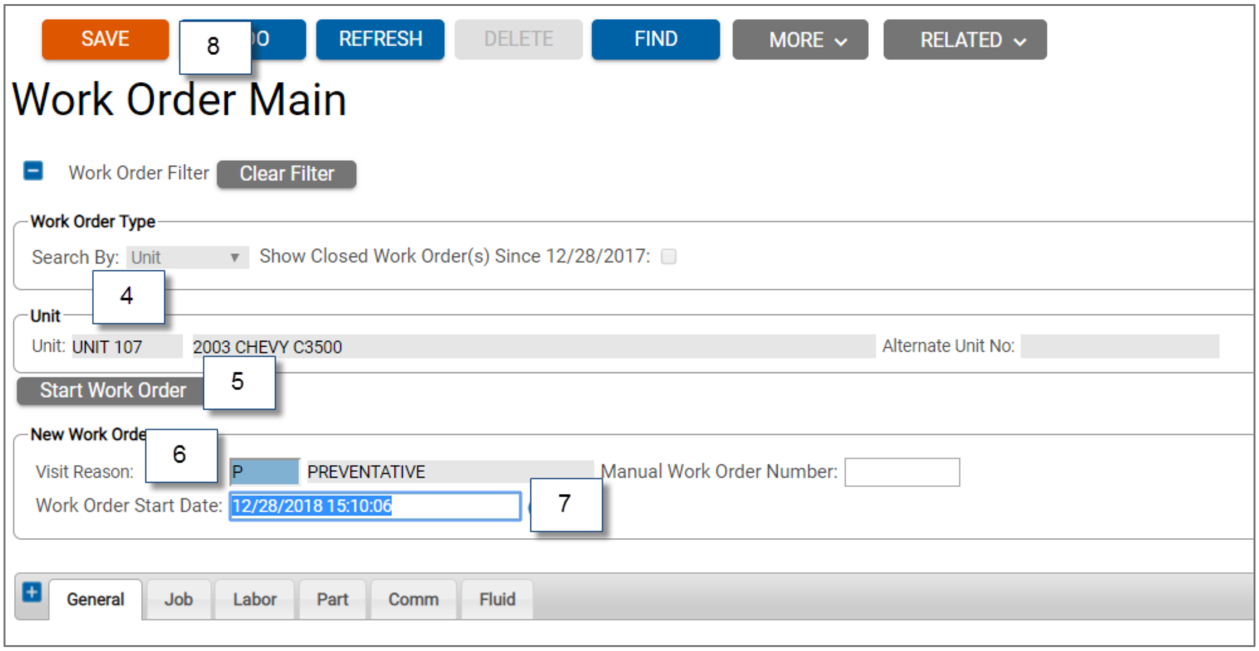


1. Navigate to the **Work Order Main** frame and select **Unit** from the **Search By** dropdown menu.

2. Enter the unit number in the **Unit** field.

   -OR-

   Select the **FIND** button at the top of the frame to open the **list of values** (LOV). You can select the unit number from the LOV. Another option is to double-click in the field to open the LOV.



3. Tab off the field to display the work order list. If there are any existing work requests for the unit, they will display here. Closed work orders will only display if the **Show Closed Work Orders** checkbox is selected.

4. To open a new work order, select the **Start Work Order** button

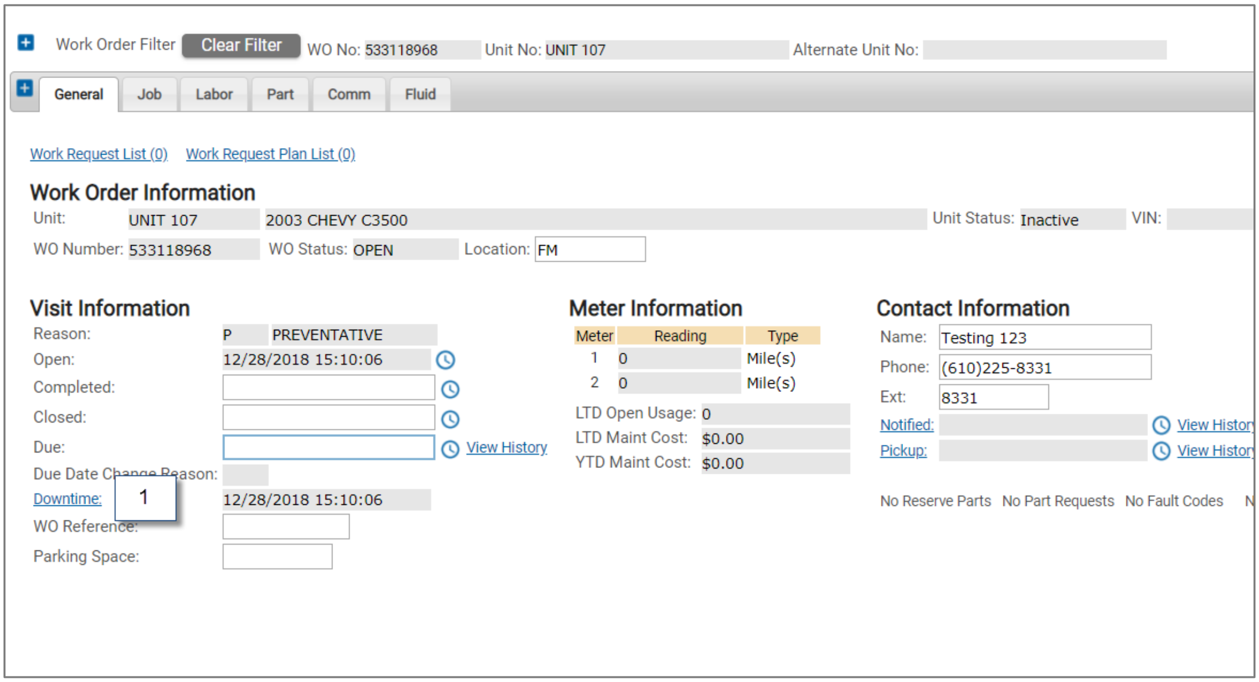
5. In the **New Work Order** section, enter a **Visit Reason** and press tab or enter.

6. The **Work Order Start Date** will default to the current date and time.

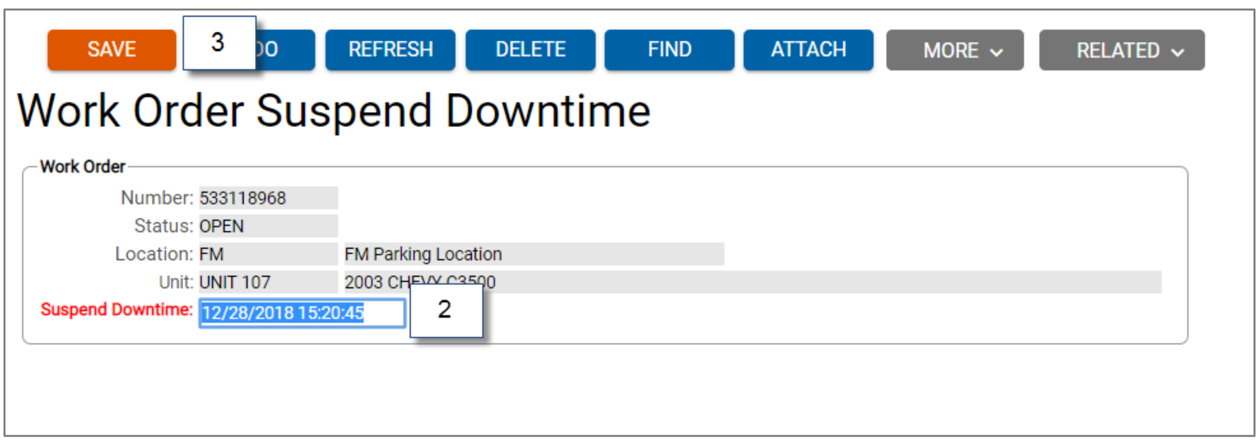
7. Finally, you can press *Tab* or *Enter* or you can also select the **SAVE** button at the top of the frame to create the new unit work order.

Downtime

Maintenance downtime starts from the time the work order is opened until it is completed unless the downtime is suspended.

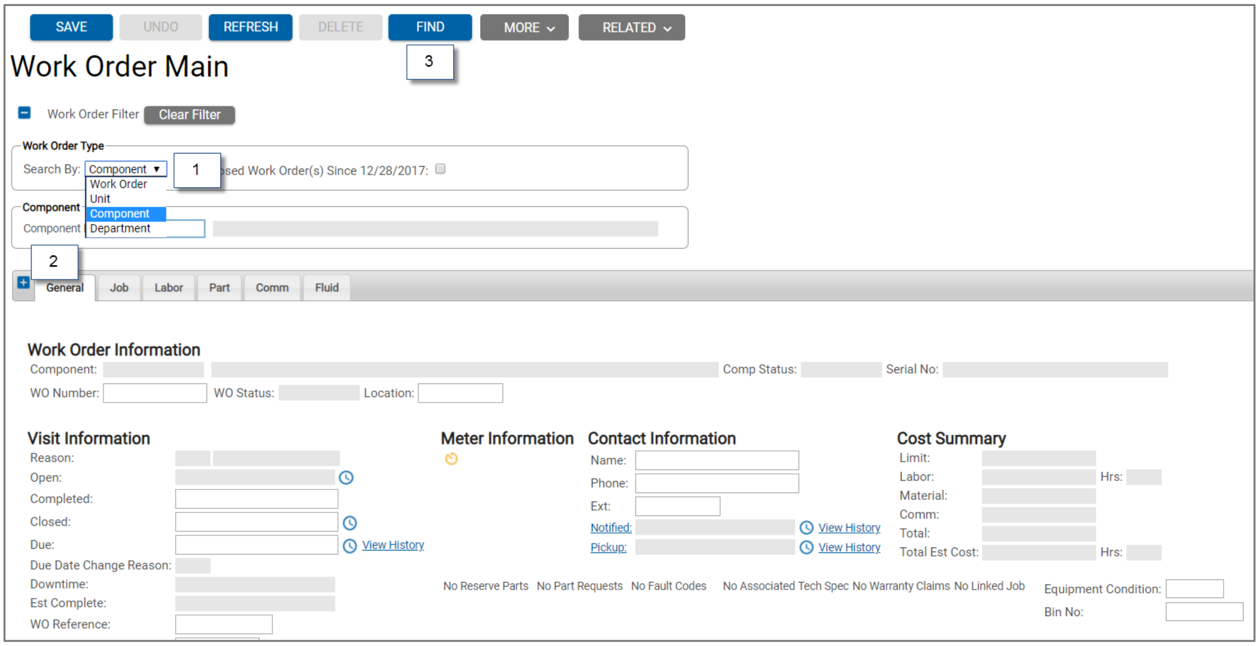


1. To suspend or unsuspend downtime, select the **Downtime Date** hyperlink on the **General tab** of *Work Order Main* to open the **Downtime** pop-up window.



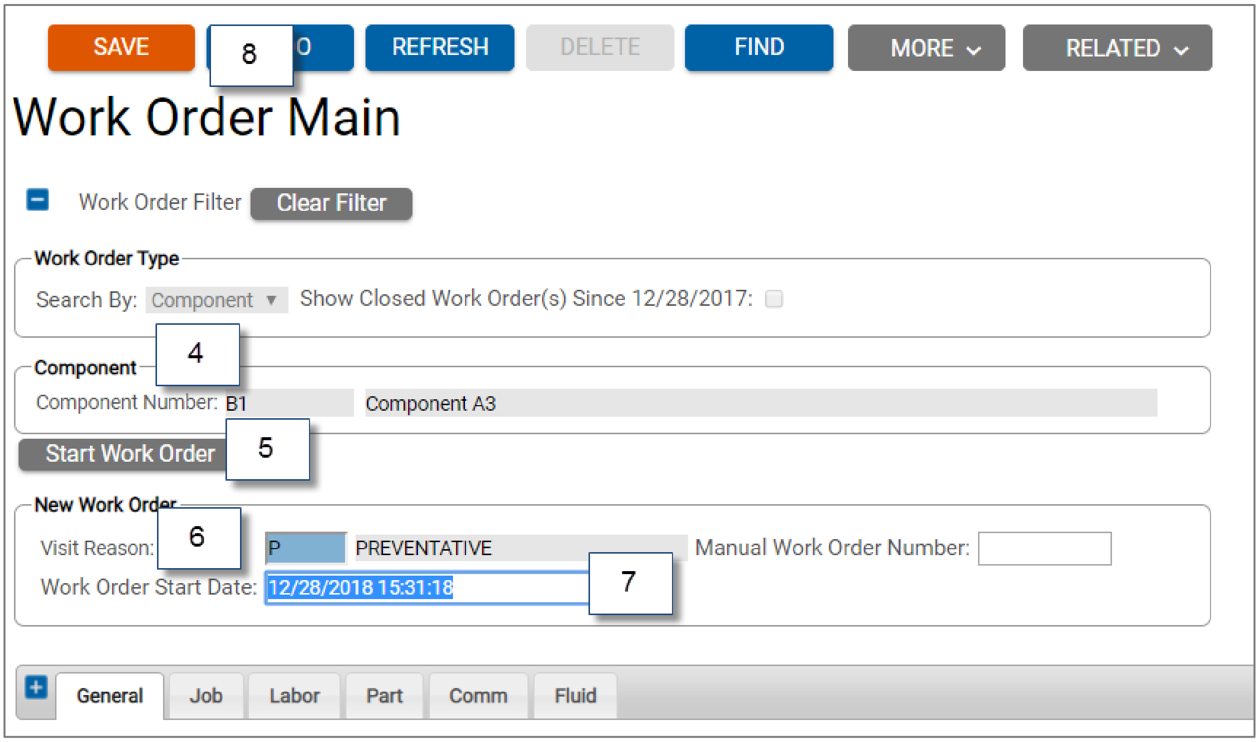
2. Enter a date in the last field.
3. Select the **SAVE** button to suspend or unsuspend downtime.

Creating a Component Work Order



You will follow more or less the same steps as you would for creating a unit work order.

1. Navigate to *Work Order Main* and select **Component** from the **Search By** dropdown menu.
2. Enter the component number in the **Component** field.
3. You can also select the **FIND** button at the top of the frame to open the **list of values** (LOV). You can then select the component number from the available list. Another option is to double-click in the field to open the LOV.



4. Tab off the field to display the work order list. If there are any existing work requests for the component, they will display here. Closed work orders will only display if the **Show Closed Work Orders** checkbox is selected.

5. To open a new work order, select the **Start Work Order** button.

6. In the *New Work Orde*r section, enter a **Visit Reason** and press *Tab* or *Enter*.

7. The **Work Order Start Date** will default to the current date and time.

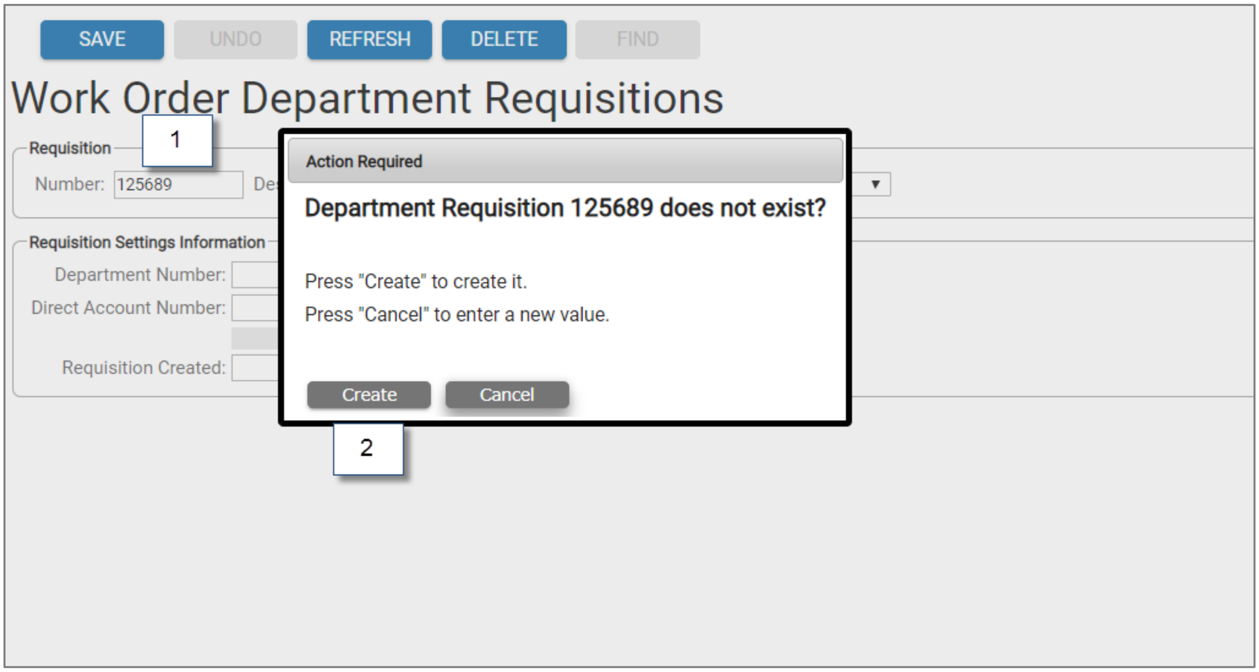
8. Finally, you can press *Tab* or *Enter* or you can also select the **SAVE** button at the top of the frame to create the new component work order.

Downtime can be suspended or unsuspended in the same manner as for the unit work order.

Creating a Department Work Order

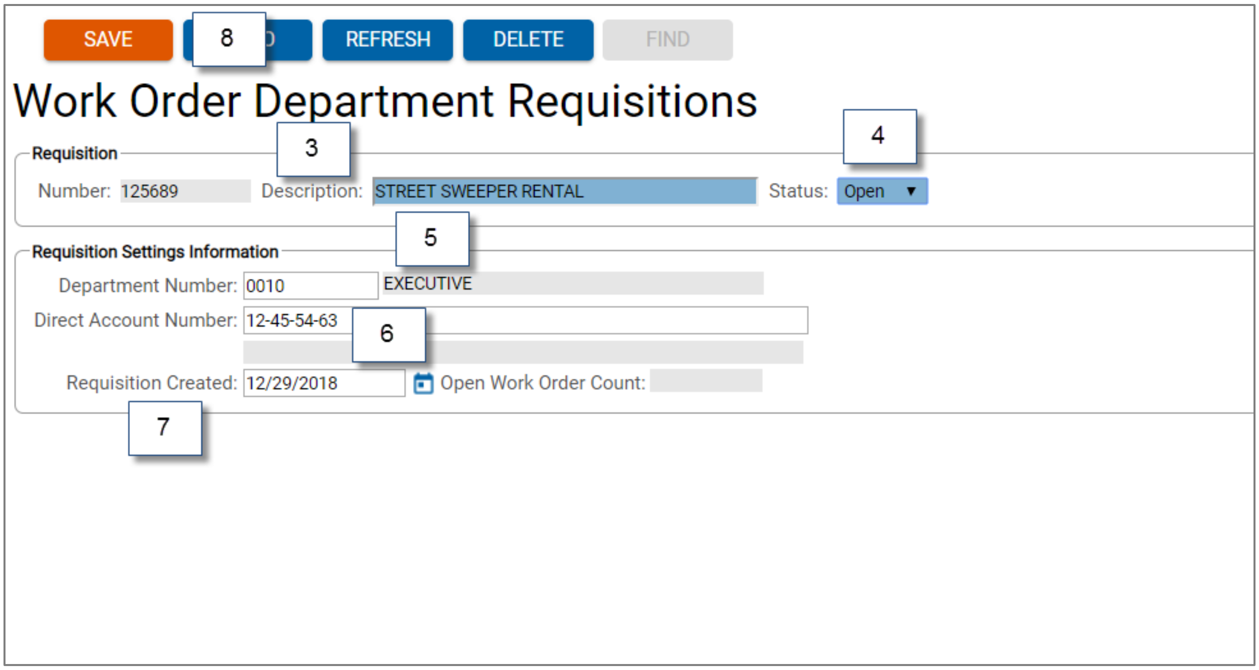
Department work orders require a slightly different setup than unit and component work orders. Before opening a department work order, you must create a department requisition or one must already exist in the system.

Department Requisitions



1. Enter a new requisition number in the **Number** field and press *Tab* or *Enter* (to view existing requisitions, select the **FIND** button or double-click in the field to open the list of values).

2. You will receive a pop-up telling you the requisition does not exists. Select the **Create** button to confirm the action.

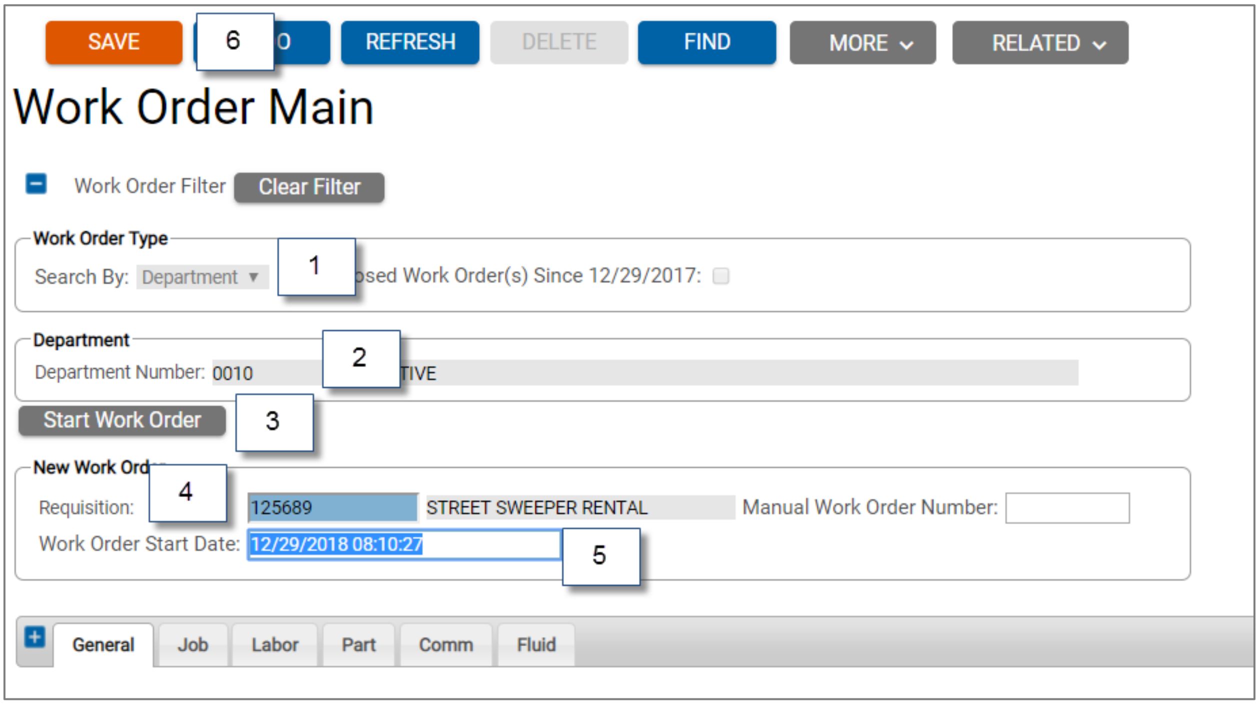


3. Enter a **Description** for the requisition.
4. The status will default to **Open**.
5. Enter or select a valid **Department** number.
6. Enter or select a valid **Direct Account Number** for billing purposes, as applicable.
7. The **Requisition Created** date will default to the current date, but you can change it if necessary.
8. Select the **SAVE** button at the top of the frame to create the requisition.

Department Work Orders

A department work order is created in the same manner as a unit or component work order except it uses a department requisition instead of a work order visit reason code. All other work order functionality is the same.

There is no downtime associated with a department work order.



1. As with the unit and component work orders, use the **Search By** dropdown to select **Department** for the work order type.
2. Enter the **Department Number** or select the **FIND** button to open the LOV. You can also double-click in the field to open the list.
3. After pressing *Tab* or *Enter*, the list of work orders for that department will display if available. Select the **Start Work Order** button to open a new work order.
4. Enter the **Department Requisition** number in the **New Work Order** section or you can use the LOV to search for the number.
5. The **Work Order Start Date** will default with the current date and time.
6. You can press *Tab* or *Enter* to move off the field or select the **SAVE** button to create the new department work order.

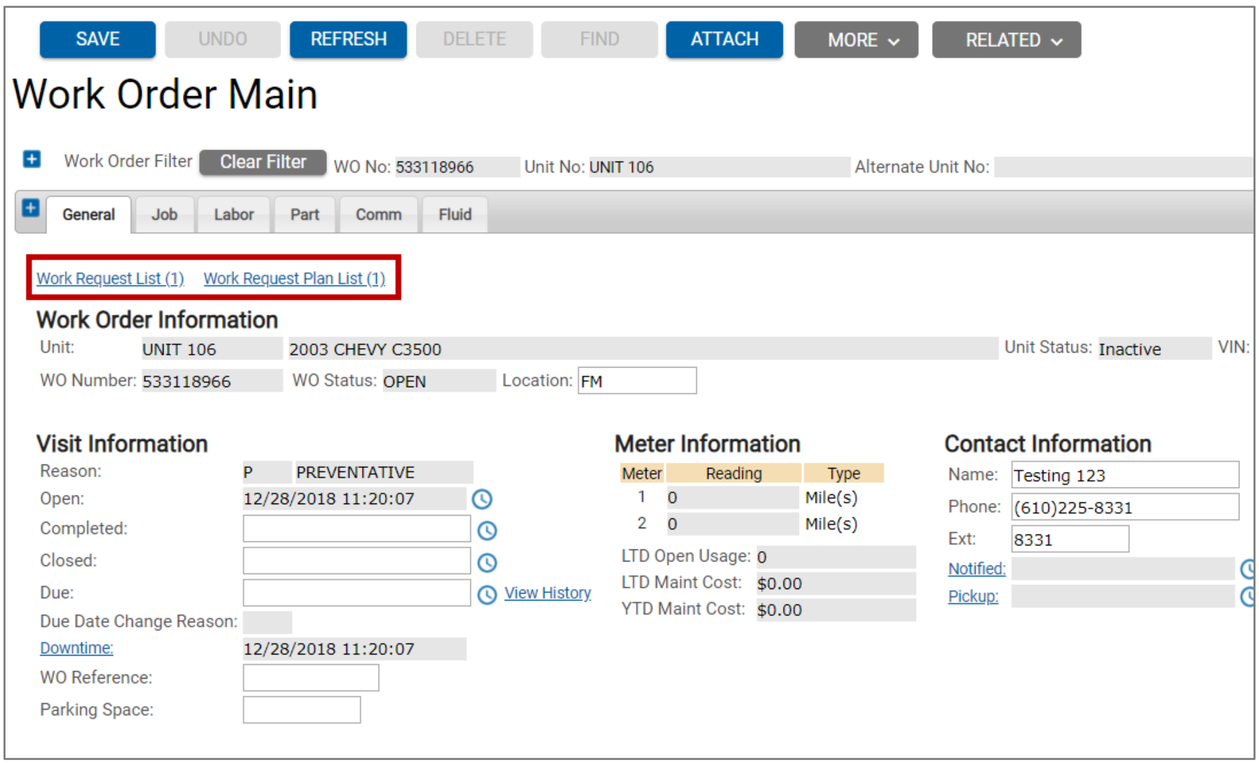
4. Adding Jobs to a Work Order

There are a few ways to add jobs to work orders in M5. Two of the most basic are by using an existing **Work Request** or manually on the **Job tab** of Work Order Main.

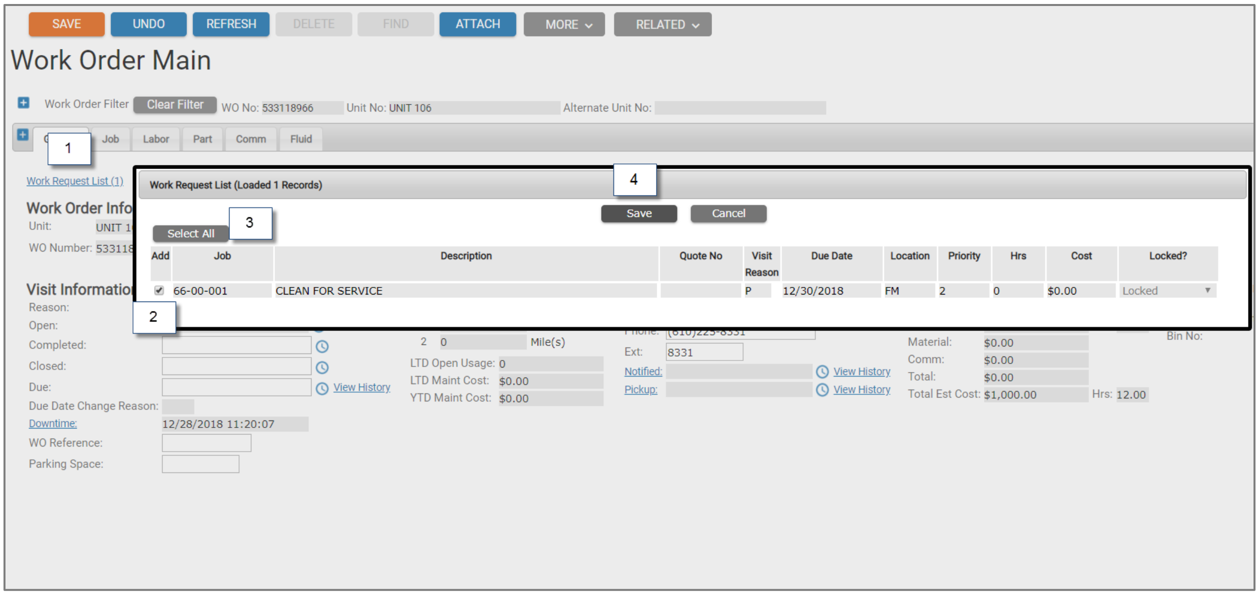
You must have the **WOUNITALL – JOBS** role privilege.

Work Request and Work Request Plan List

On the **General** tab of *Work Order Main* there are two hyperlinks that will allow you to add jobs to a work order: **Work Request List** and **Work Request Plan**.



If outstanding work requests or plans exist, a number will appear in the parenthesis at the end of the hyperlink. If none exist, you will see a zero.

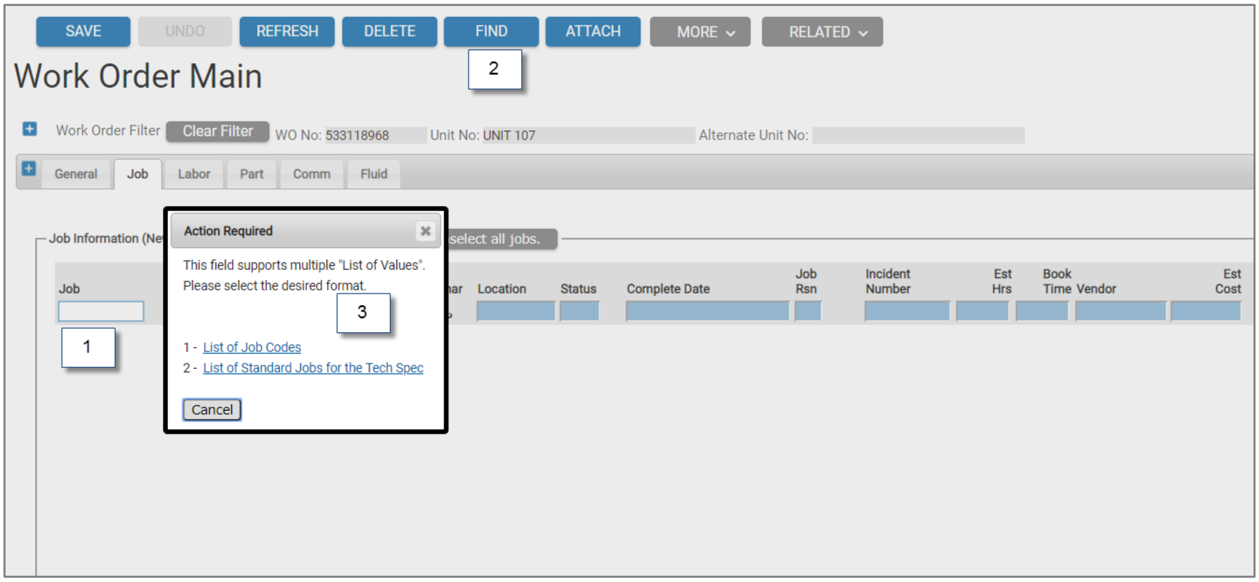


1. To add a work request, select the **Work Request List** hyperlink to open the list pop-up.
2. Select the checkbox in the **Add** column for any work request you want to add.
3. You can also use the **Select All** button if there are multiple work requests and you want to add all of them.
4. When you are finished making the selection, select the **SAVE** button. The job from the work request will now appear on the job tab for the work order.

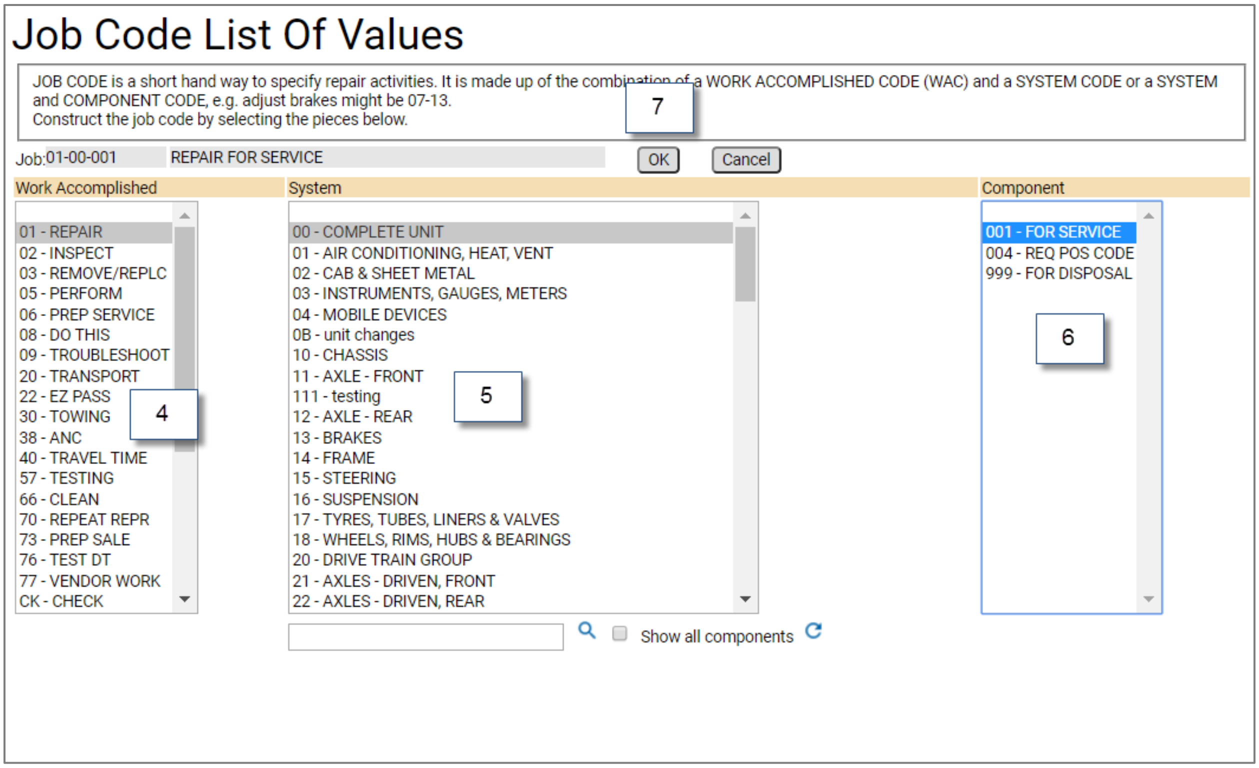
You can follow the same process for adding a Work Request Plan to the work order.

Adding a Job Manually

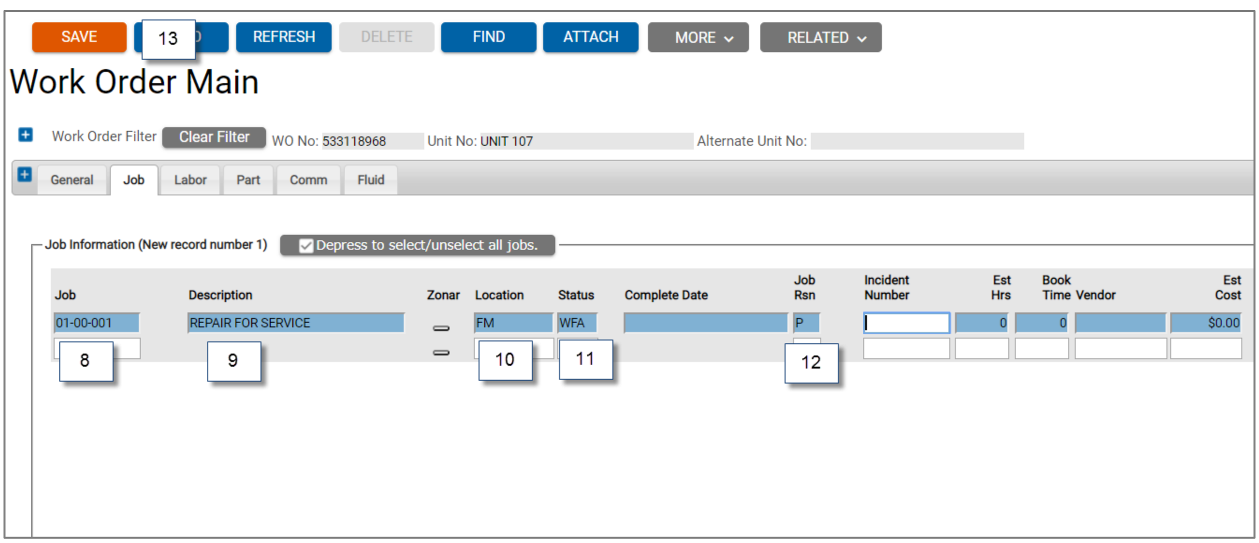
You can also add a job manually by going to the **Job** tab on Work Order Main and entering the necessary data yourself.



1. Enter the **Job Code** in the job field.
2. You can also select the **FIND** button to launch the action window or double-click in the field.
3. Select **List of Job Codes** to launch the list of values (if you want to add an existing Standard Job, select option two).



4. Select a **Work Accomplished** code.
5. Select a **System** code.
6. Select a **Component** code.
7. Select the **OK** button to exit the LOV and add the job code to the job tab.



8. The appropriate job code will display.
9. The **Description** will automatically populate based on the selection.

10. The **Location** will default to the Work Order location.

11. The **Status** will update to WFA (waiting for assignment).

12. A **Job Reason** must be entered and is a required field.

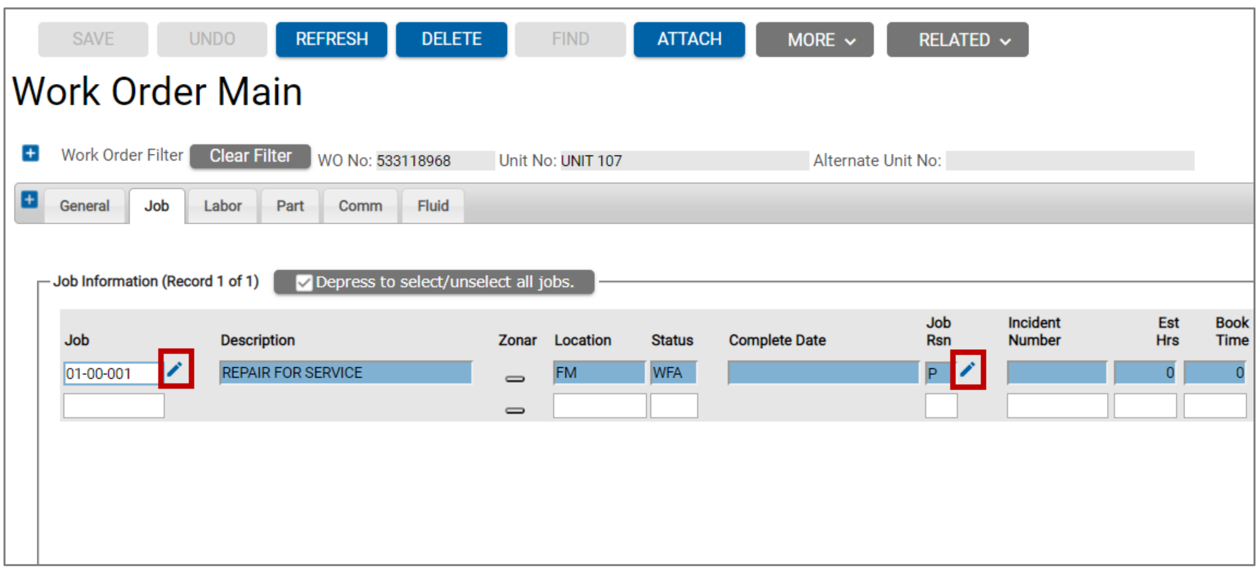
13. Select the **SAVE** button.

If System Flag 5303 is set to **Y** you will be prompted to verify that the job being entered will be added from the pending work request if there is a pending work request and they are entering the same job code. If it is set to **N**, job being entered will be considered a manual direct entry not associated with a pending work request.

The location can be changed if you are using **Facility** work orders which is controlled by System Flag 1062.

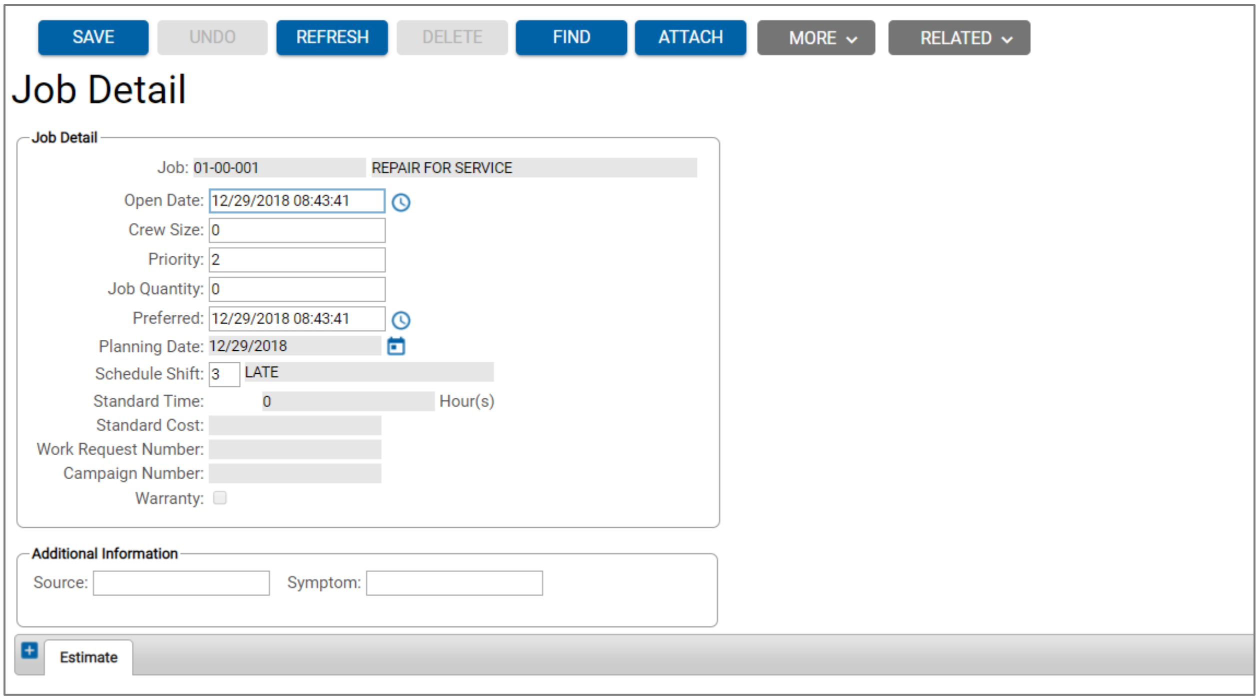
There may be other system settings that affect what fields are required or available when adding a job, but at a basic level this is the minimum required to manually add a job to a work order.

Job Detail and Change Job Visit Reason

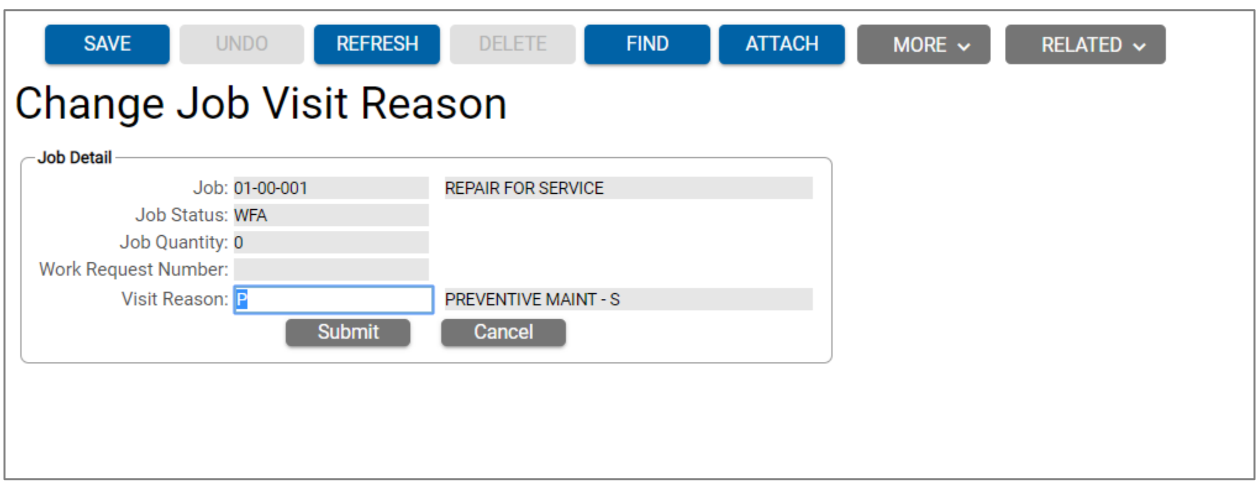


The *pencil* icon next to the job code displays the work order job detail frame which provides more data about the job such as job detail, source, symptom, estimates, and resources. If anything is changed, select save and return back to the work order frame. If no changes are needed, select the *X* icon on the top right corner to return. You can scroll to the right so it can be seen.

The **Estimate** tab can be used to modify the estimates as well as indicate what resources are needed for the job.

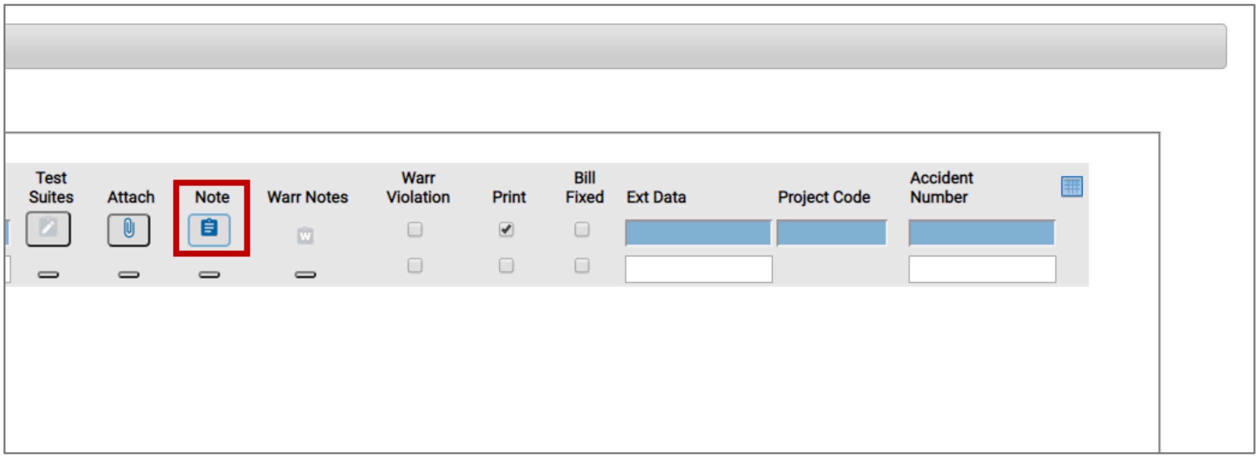


You can also change the job visit reason by selecting the *pencil* icon next to the **Job Rsn** field.



Job Notes

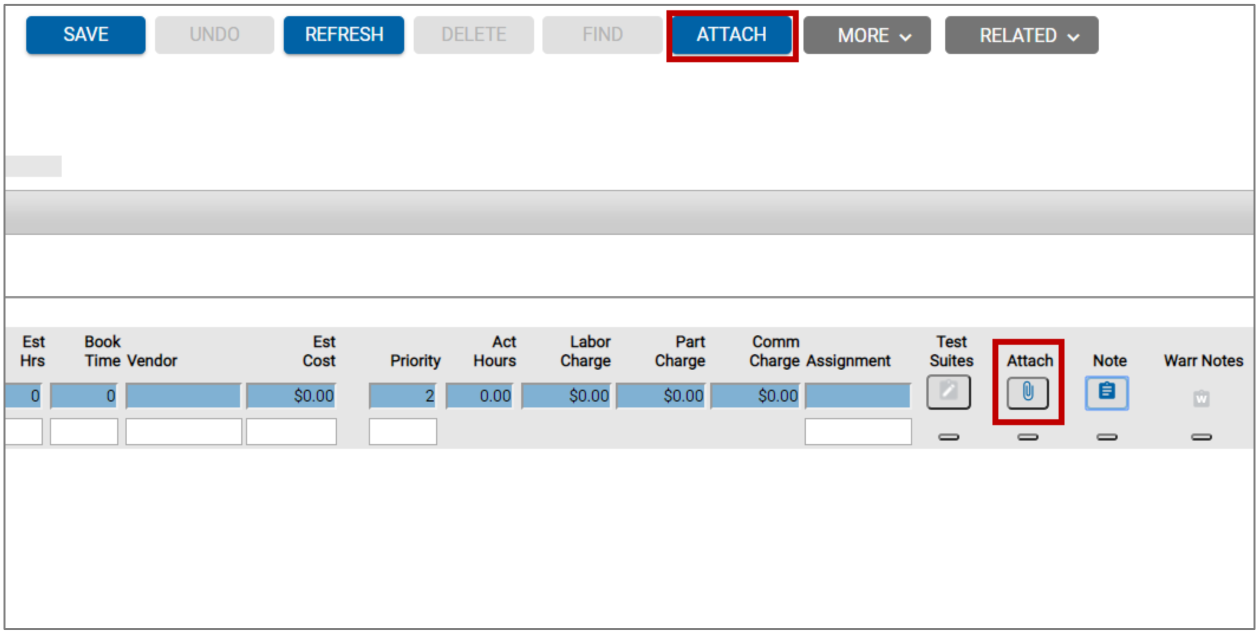
System Flag 5522 – Use Standard/Separate WO/Warranty/Job Notes? (Y/N) controls when you can view one **Note** icon on the job line within the **Job** tab. When you select **Notes**, the notes for the job display all job notes and 3C notes associated with the job on new frame with **Print** functionality. Notes can be added to the job by selecting the **Note** icon in the job row.



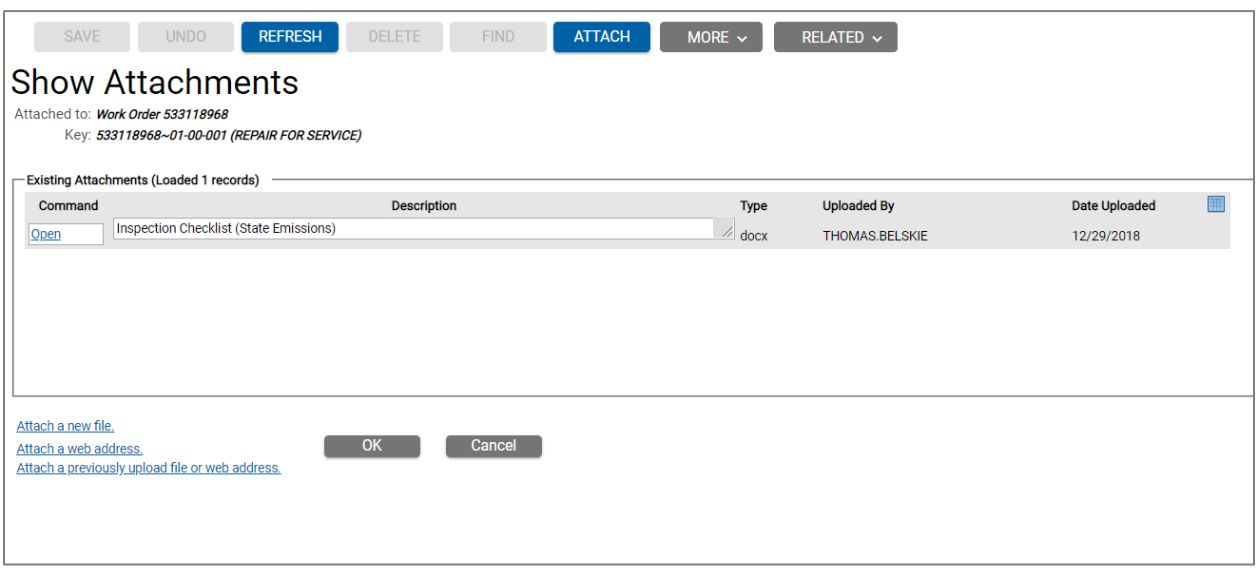
If notes already exist, the icon will appear blue. If none exist, it will appear gray. Selecting the icon opens the **Work Order Note Editor** where you can add and view notes for the job.

Attachments

There are two options for adding attachments to the work order. The first is the **Attach** button at the top of the frame will attach items to the work order as a whole.



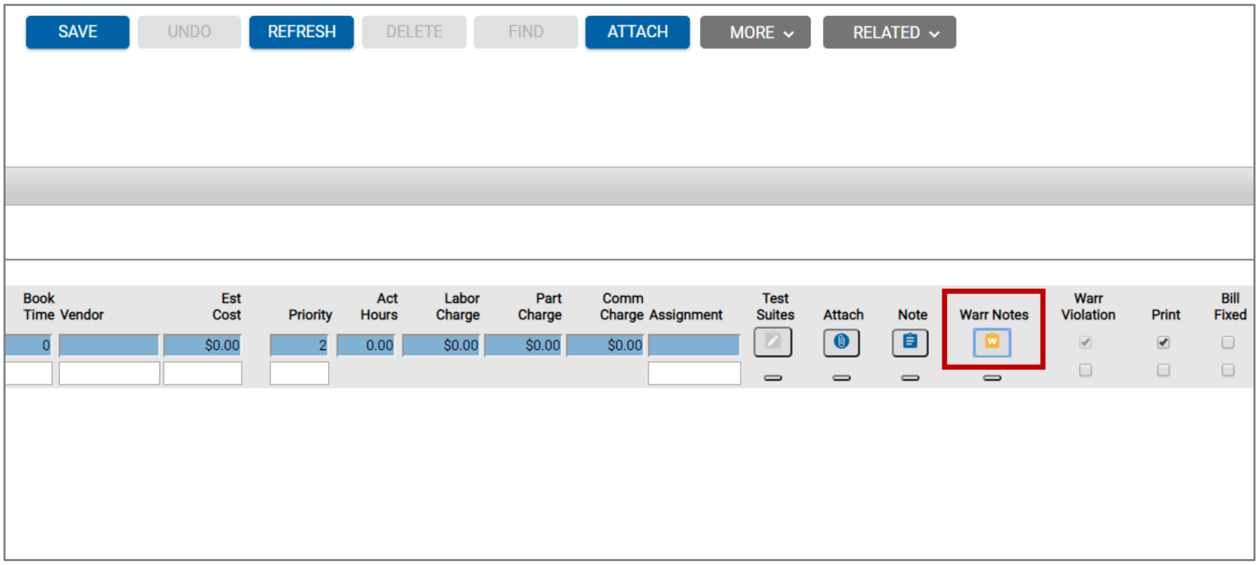
The second option is to select the *paper clip* icon in the job row to attach an item, such as a document to the job itself. If attachments already exist, a blue circle will appear around the icon.



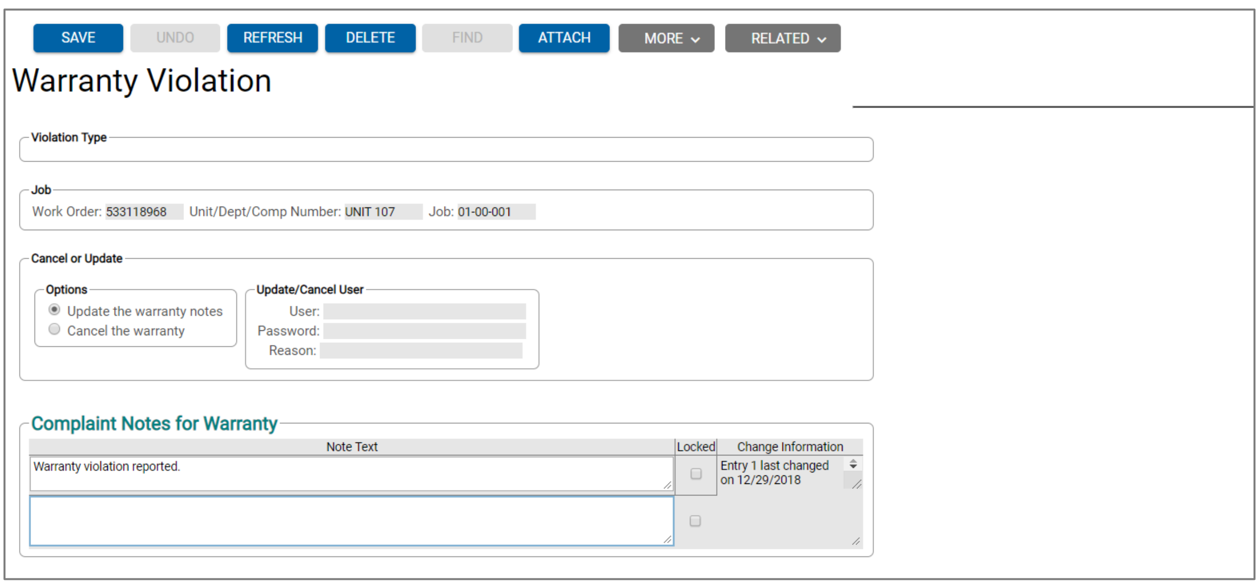
You can attach a file or web address to the job. Select the type of attachment and then enter a description for the file, such as Inspection Checklist. Select **OK** when finished.

Warranty Jobs

Notes can also be added if the job is a warranty job and can even be required depending on the setting of System Flags 2066 and 2067 (if set to **Y** they will make the Complaint, Cause, and Correction notes, the three C's, required).



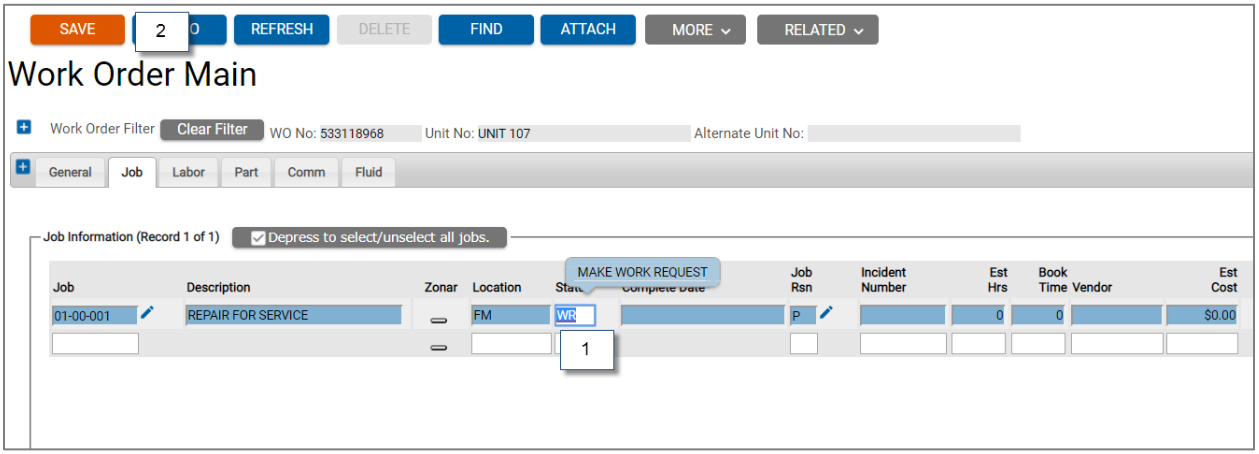
If there are existing warranty notes, the icon will appear yellow. To add notes, select the icon to open the **Warranty Violation** window.



From this window you can add or update the warranty notes or **Cancel** the warranty by selecting the **Cancel Warranty** radio button. By default, M5 will require the username and password of the application user to cancel the warranty. However, System Flag 5248 can be set to **Y** to bypass this requirement. The user must also have the **WARR CANCELLATION** role privilege.

Deferring a Job

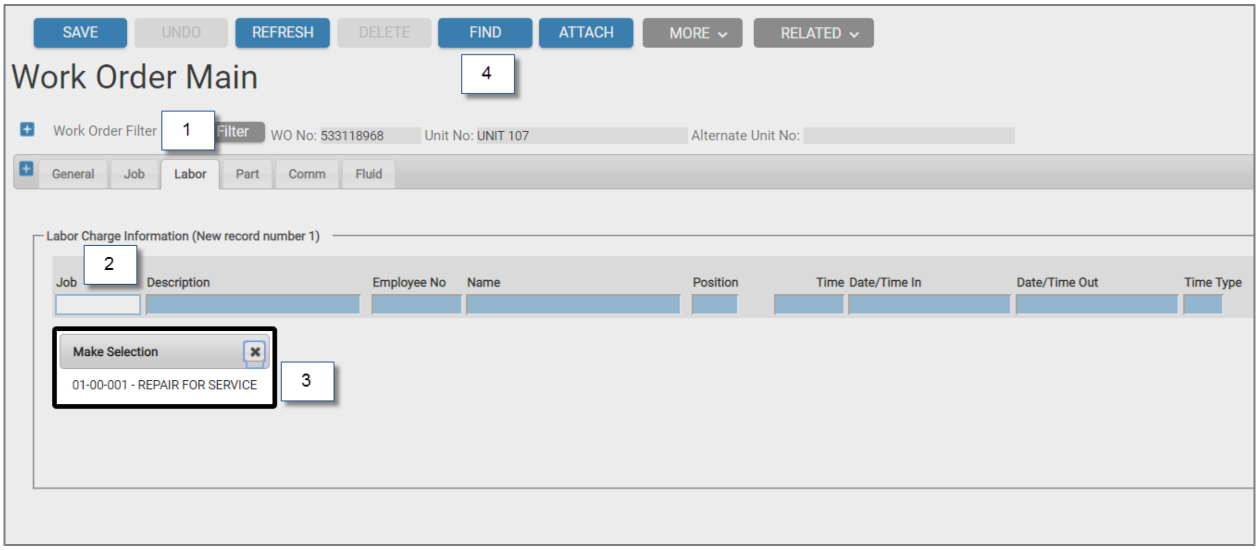
If for some reason a job cannot be completed and needs be finished at a later date, you have the option to defer jobs from the work order and turn them into work requests so they can be completed later.



1. Enter the code **WR** in the job status field.
2. Select the **SAVE** button.

5. Adding Labor to a Work Order

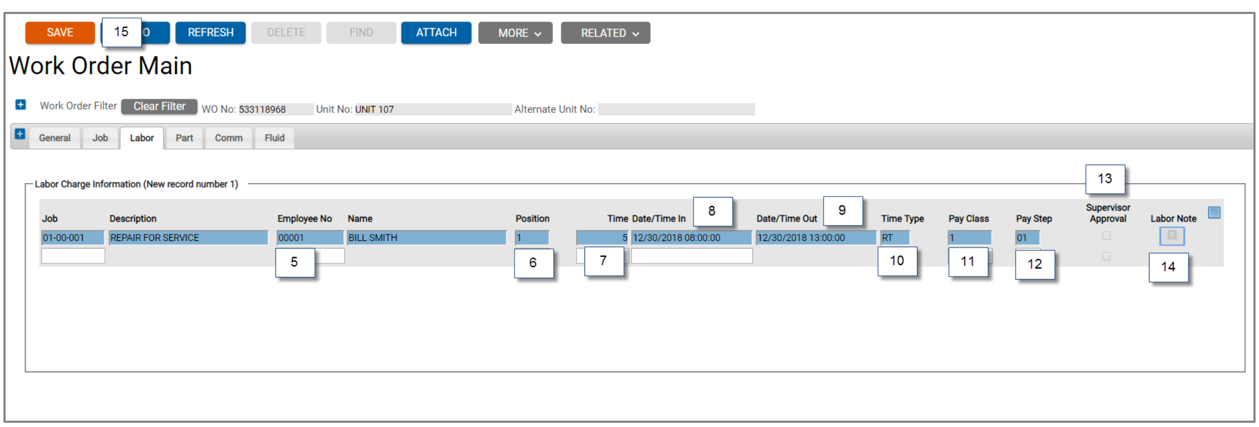
Labor entries being charged to a work order can be entered, viewed and adjusted here no matter what frame was used to enter the labor. Other places to enter labor on a work order are the *Employee Time Card* and the *Labor Wedge* frame.



1. To add labor charges to a work order, navigate to the **Labor** tab.
2. Enter a valid job code in the **Job** field.

   Jobs must be set up on the **Job** tab before you can add them here to the **Labor** tab and apply charges to them.

3. You can also **right-click** in the **Job** field to display a list of available jobs.
4. Another option would be to use the LOV by selecting the **FIND** button at the top of the frame or double-clicking in the field.



5. Enter a valid **Employee** in the **Employee No.** field. The employee name will automatically display with data from the Employee Main record.

   System Flag 2036 determines who can charge time on a Work Order.

6. Enter a valid **Position Code** in the **Position** field.

   If System Flag 5016 is set to **Y**, this field will be required.

7. Enter the length of **Time** on the job.

   System Flag 1212 determines how many days labor charges can be backed dated before the work order was opened.

   System Flag 5005 determines if the time is entered by hours or time in and time out. If the flag is set to **N**, the time is entered by hours. M5 looks to the employee's shift to determine time in and time out.

8. For **Date/Time In**, if System Flag 5005 is set to **Y**, you must enter the date and time you started your work.

9. For **Date/Time Out**, if System Flag 5005 is set to **Y**, you must enter the date and time you ended your work.

10. **Time Type** will automatically display based on the Employee selected.

    If System Flag 5003 is set to **Yes**, time type can be entered and corrected.

11. **Pay Class** will automatically display based on the Employee selected.

    If System Flag 5003 is set to **Yes**, Pay Class can be entered and corrected.

12. **Pay Step** will automatically display based on the Employee selected.

    If System Flag 5003 is set to **Yes**, Pay Step can be entered and corrected.

13. If you are a supervisor approving labor, select this checkbox to indicate the approval (if applicable).

14. Select the **Labor Note** icon to enter any notes about the work performed.

15. Repeat steps for any additional jobs or charges. Select the **SAVE** button at the top of the frame when you are finished.

    You must have the **WOUNITALL – LABOR** role privilege.

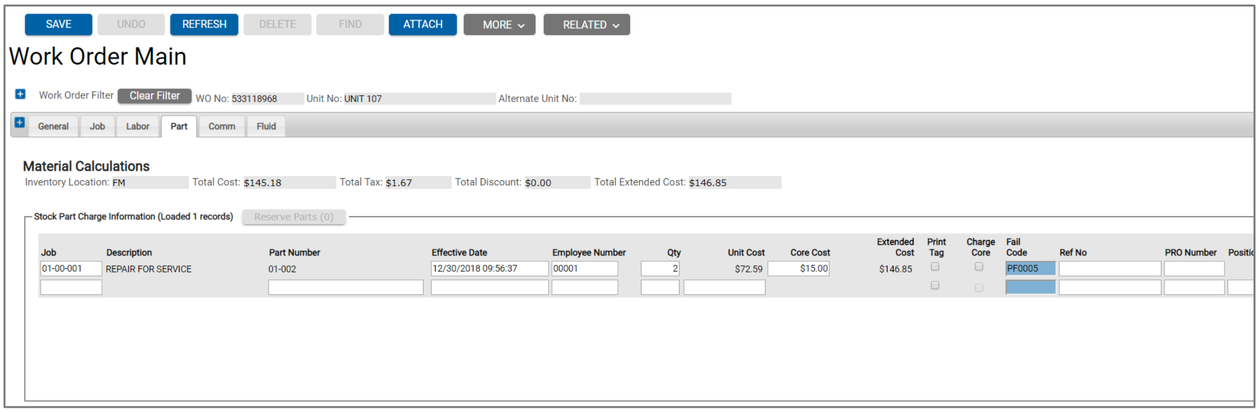
6. Adding Parts to a Work Order

Stock and non-stock part charges can be added and adjusted here in separate sections. Reserved parts can also be issued from here.

Parts charged or returned to the work order from the Part Issue and Part Return frames will also show here. If there are any standard jobs on the WO and if those standard jobs had parts listed, those parts will display here if System Flag 5109 is set to **Yes**.

If System Flag 1343 is set to **N**, non-stock part issues will not be allowed from Work Order Main. If the flag is set to **R**, only non-stock issues from reserve will be allowed.

When issuing a part from a Part Kit, you will be shown a list of parts in the kit in a content window. You have the option to not issue any parts from the kit by selecting the **Cancel** button.



1. Depending on the part (stock or non-stock), enter a valid **Job Code** in the appropriate i-frame or use the LOV to select one.
2. If **Reserved Parts** are available, you can select the button to add them to the work order. If not, you can enter a valid part number or use the LOV to select one.

   The **Effective Date**, **Unit Cost**, and **Core Cost** will automatically display.

3. Enter a valid **Employee** number.

   This will be required if System Flag 5013 is set to **Y**.

4. Enter the **Quantity** of the part being issued.

   The maximum quantity that can be issued is controlled by System Flag 2037.

5. A **Failure Code** will be required if System Flag 5015 is set to **Y**.
6. A **Position Code** will be required if System Flag 5016 is set to **Y**.
7. Parts can have **Warranty Terms** and those can be entered here.

8. If Part Issues need to be approved, the **Approve** checkbox is used for that functionality.

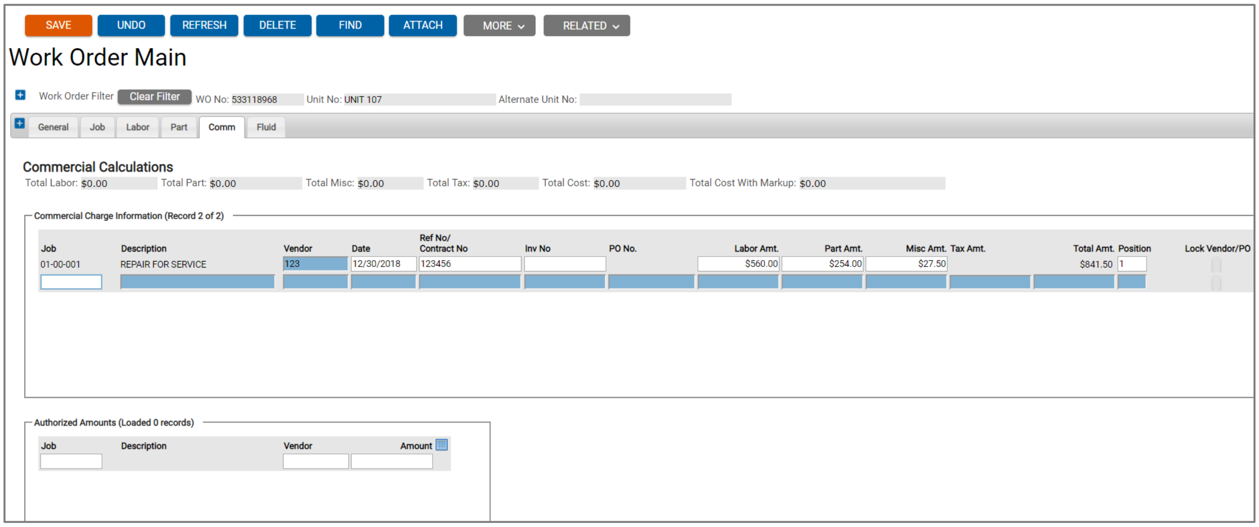
9. When finished, select the **SAVE** button at the top of the frame.

   You must have the **WOUNITALL – PARTS** role privilege.

7. Adding Commercial Charges to a Work Order

Commercial charges from outside or third party vendors can be entered on the **Commercial** tab of *Work Order Main*. Another frame, *Commercial Work Order*, is also available for applying and recording commercial charges.

You can add charges for labor, parts, and miscellaneous costs involved with commercial work related to the work order.



1. To enter commercial charges, enter or select the job you want to apply the charges to. The job can be selected in the same way as on the labor and parts tabs.
2. Enter a valid **Vendor** from vendor main. This value should correspond to the entity performing the work.
3. The date will populate by default. The date cannot be before the work order open date.

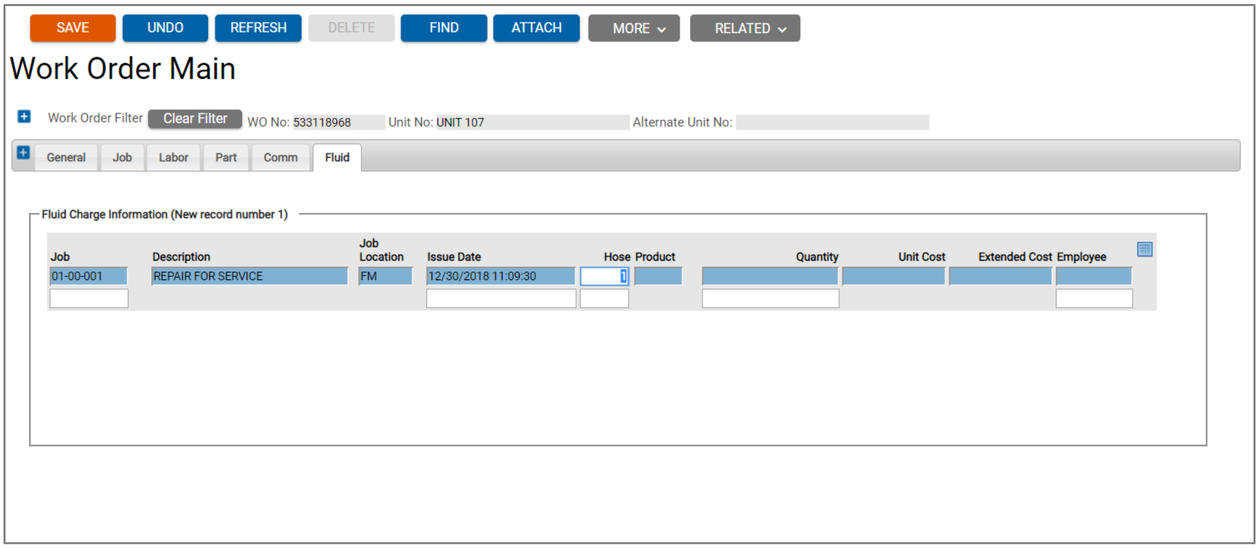
   If System Flag 5080 is set to **Y**, the work order open date will be the default date. If it is set to **N**, the current date will be the default date.

4. Enter a contract number for the vendor if one exists.
5. Enter any labor, part, or miscellaneous charges.
6. Enter a position code if required.
7. When finished, select the **SAVE** button at the top of the frame.

   You must have the **WOUNITALL – COMMERCIAL** role privilege.

8. Adding Fluid Charges to a Work Order

M5 also offers you the ability to apply fluid charges to jobs on the work order. Product codes, tanks and hoses must be set up before charges can be applied here. You must also have the **WOUNITALL – FLUID** role privilege assigned to your role.



8. To add fluid charges, enter the job code or select it from the LOV. This action can be performed using the same steps from the labor, part, and commercial tabs.
9. The **Description** will automatically display along with the **Job Location**.
10. The **Issue Date** will default to the current date and time.
11. Enter or select the **Hose** number.
12. Enter a valid **Product** number.

    Hose and product combinations must be configured and associated to the unit to appear on the list of values.

13. Enter the **Quantity** being issued, such as the number of quarts or gallons.
14. Enter the **Employee** issuing the fluids to the work order.
15. Select **SAVE** when finished.

    You must have the **WOUNITALL – FLUID** role privilege.

9. Completing a Work Order

The next step in Work Order Processing is completing the work order. Certain Job Status codes will determine if the job must be marked **DON** before the system will allow you to complete a work order.

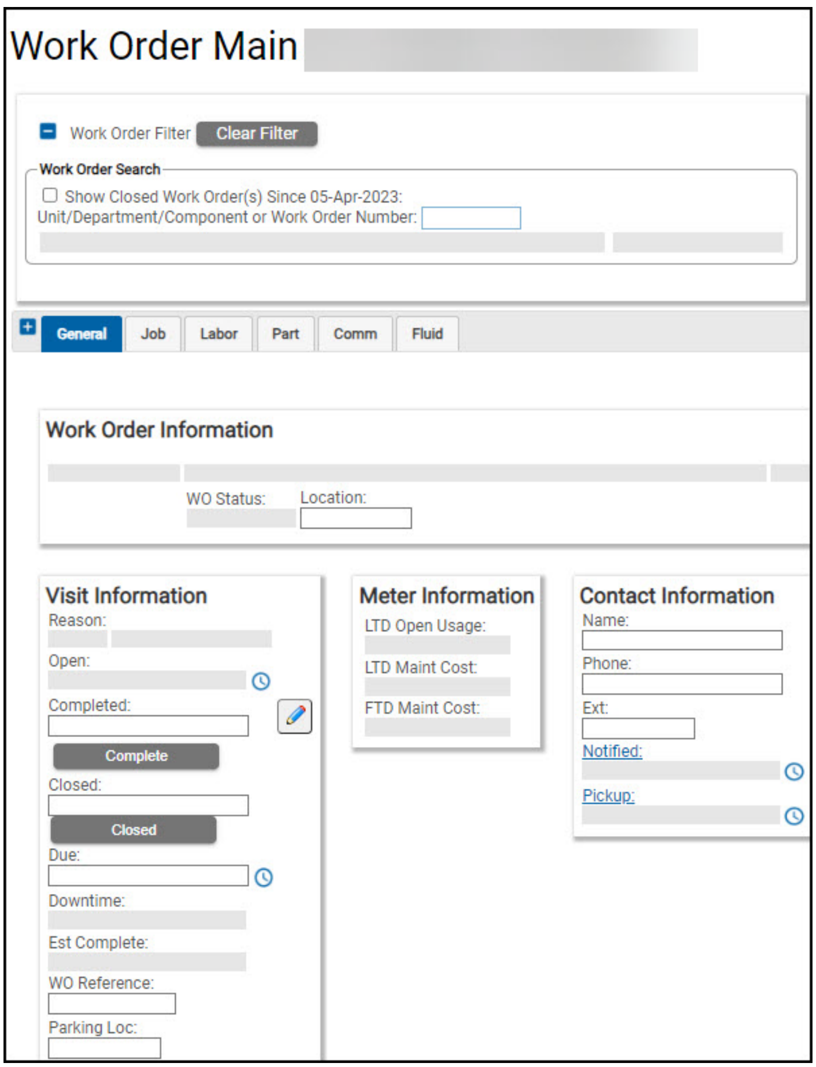
You can add a signature to closed the work order for any status:

- When you add **Complete WO Signature** on the *Screen Designer Work Order Main* frame.

OR

- If System Flag 5524 is set to **Y**, the work order will require the signature to be entered prior to completing the work order.

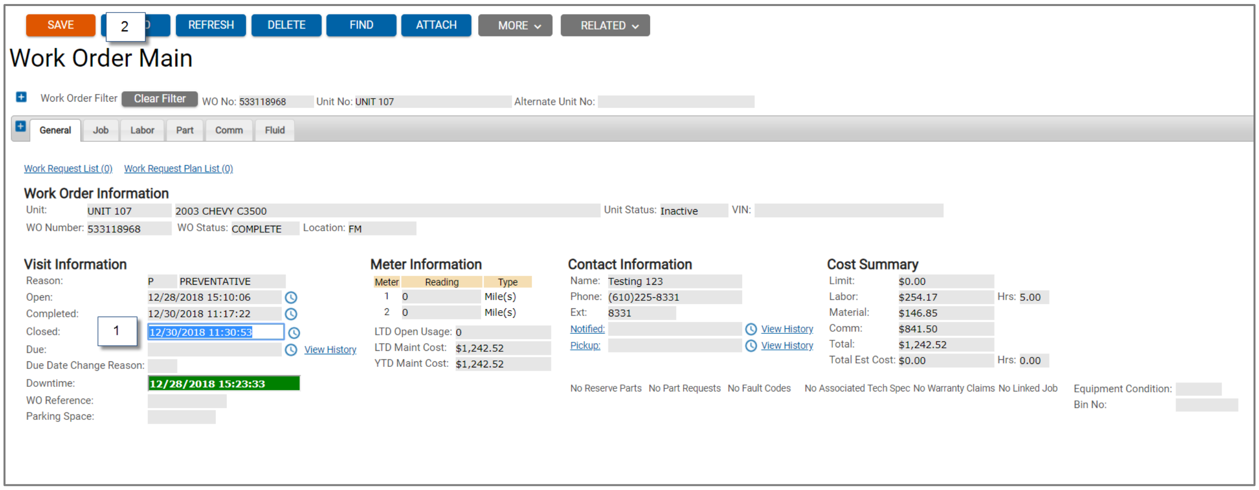
Note: After you enter a signature and select **SAVE**, the **Complete** button is no longer available.



1. In the **Visit Information** section, enter the completed date in the **Completed** field. The date is based on the setting of System Flag 2104:
   - 1 = the most recent job completion date.
   - 2 = the most recent labor charge date; if not labor has been charged, then the most recent job completion date.
   - 3 = the current date.
   - 4 = user defined date.
2. If certain jobs need to be marked **DON** before completing the work order, you will receive a pop-up asking if you want the system to change the status to **DON** for you.
3. Select the **Yes** button to confirm the action.
   - Jobs must be marked **DON** or **WR**. WR defers the job and creates a work request. Organizations can also create a specific job code that allows WO to be completed/closed.
   - You must have the **WOUNITALL – COMPLETE** role privilege.
4. Select **SAVE**.

10. Closing a Work Order

The next step in Work Order Processing is closing the work order. The work order must be marked completed before the system will allow you to close it.

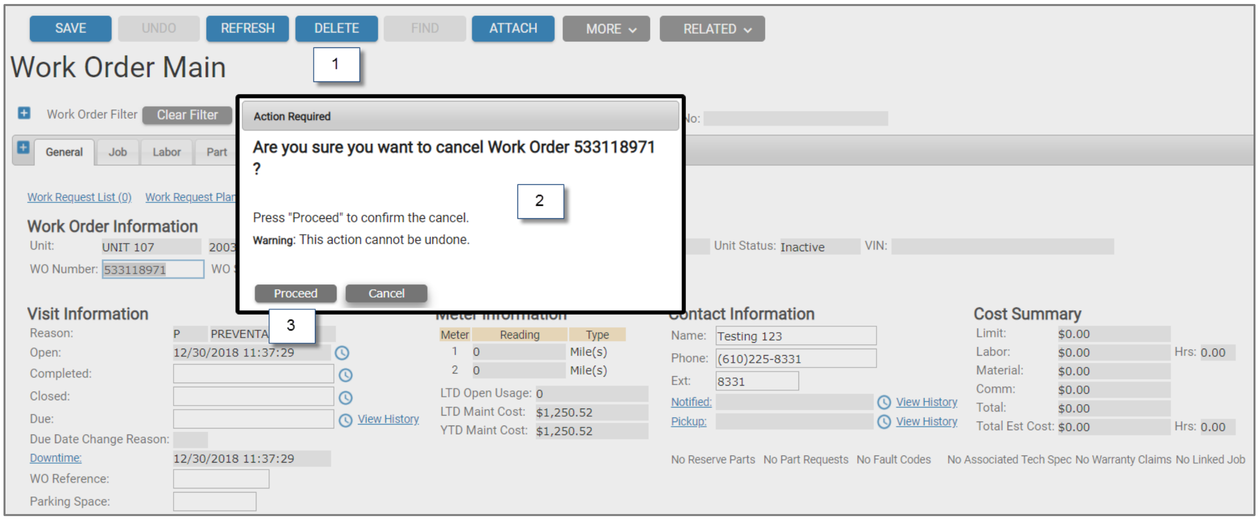


1. To close a work order, enter a date in the **Closed** field.
2. Select the **SAVE** button at the top of the frame.

   You must have the **WOUNITALL – CLOSE** role privilege.

11. Cancelling a Work Order

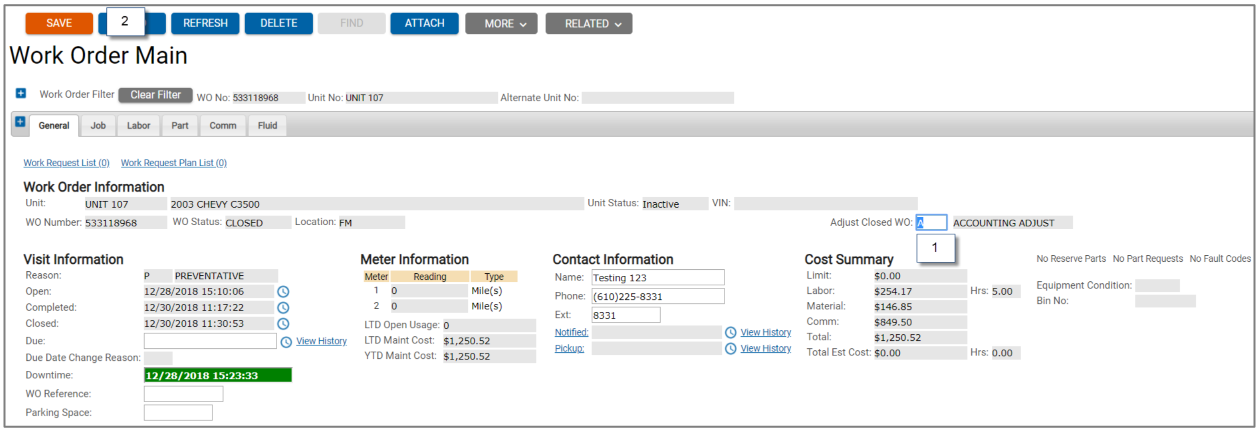
A work order can also be cancelled provided there are not any charges recorded against it.



1. To cancel a work order, select the **DELETE** button at the top of the frame.
2. You will receive a pop-up asking you if you are sure you want to cancel the work order.
3. Select **Proceed** to confirm the action.

You must have the **WOUNITALL – CANCEL** role privilege.

12. Modifying a Closed Work Order

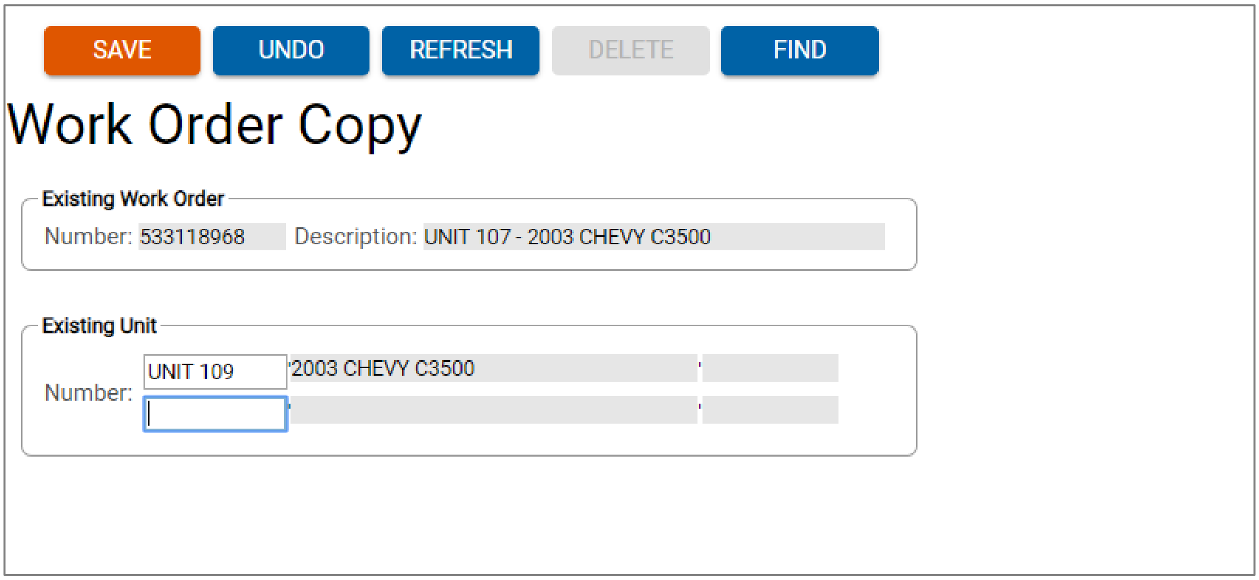


1. Enter an **Adjust Closed WO** reason.

2. After you make the necessary adjustments, select the **SAVE** button at the top of the frame.

   You must have the **ADJUST CLOSED WO** role privilege.

13. Copying a Work Order



The *Work Order Copy* frame allows you to create a new work order by copying an existing work order from *Work Order Main*.

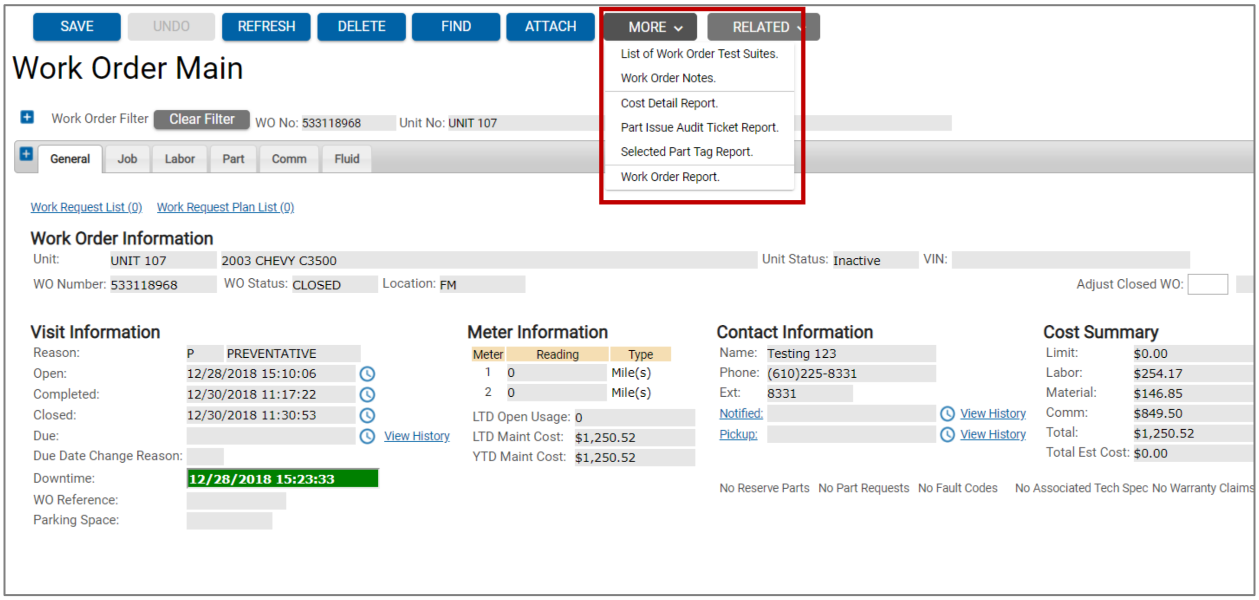
To copy a work order, enter the existing work order number in the **Number** field in the *Existing Work Order* section, or you can double-click in the field to select a work order from the list of values (LOV).

After you select an existing work order, enter or select an existing unit **Number** from the LOV in the *Existing Unit* section. This must be a valid unit from *Unit Main*.

When finished selecting the existing unit, select the **SAVE** button at the top of the frame.

If the unit already has an open work order on it, you will receive a warning message. You must first close the open work order before you can create a new one by using the *Work Order Copy* frame. You will also be notified if the unit's status does not allow work orders.

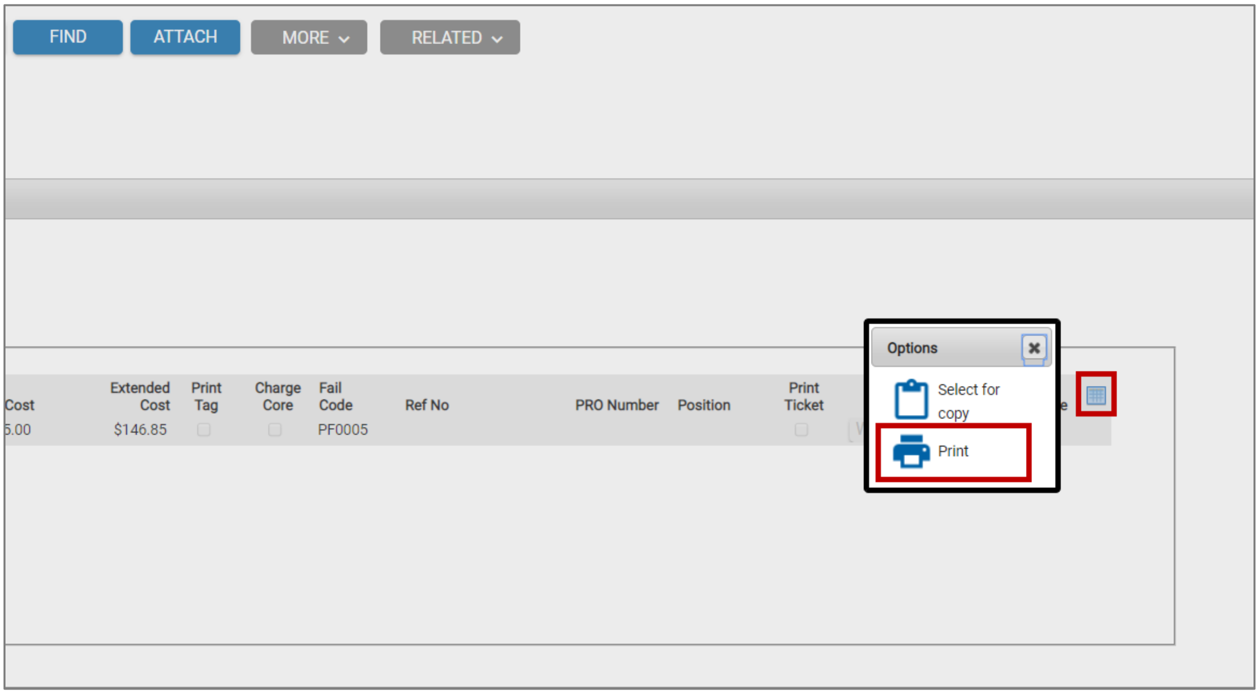
14. Printing a Work Order



For a list of available print options, hover your mouse over the **MORE** button to display the list of available actions. You can print the **Cost Detail Report**, **Part Issue Ticket Report**, **Selected Part Tag Report** or the **Work Order Report.**

You can also view the list of **Test Suites**, if available, and any **Work Order Notes** associated with the work order.

15. Printing i-frame Details from Work Order



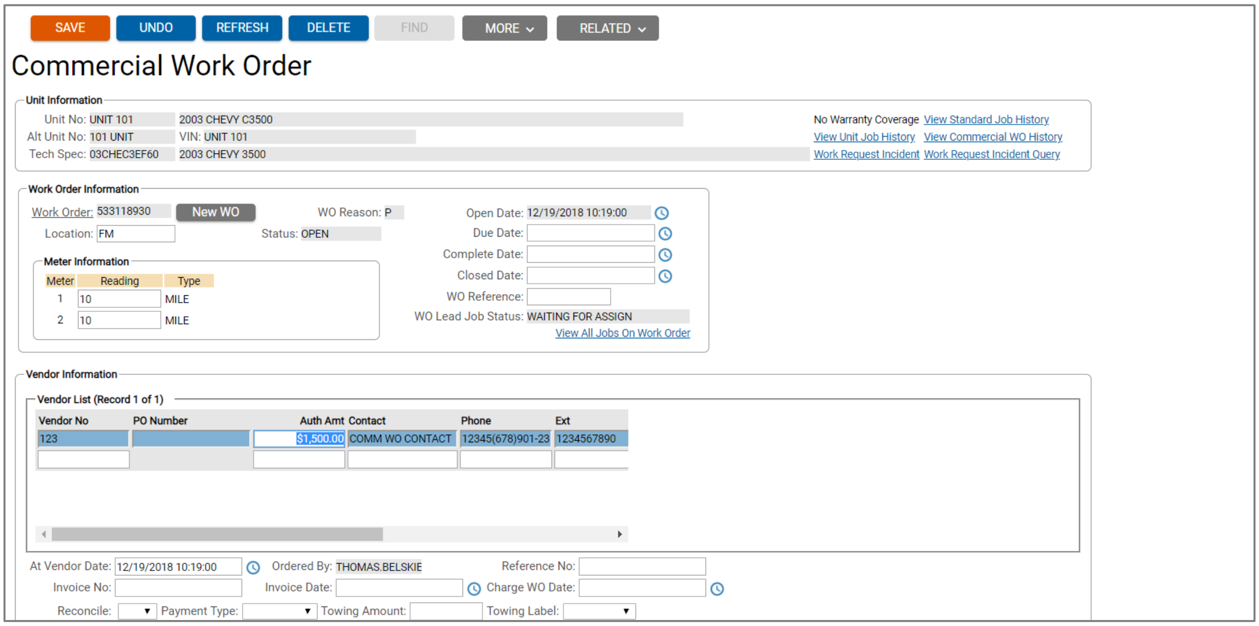
In the top right corner of each i-frame a *spreadsheet* icon exists for printing purposes. Select the icon to either **copy** the selection or **print** it.

16. Commercial Work Order Frame

A commercial work order is used for batch style entry of commercial work for units only. It is designed to quickly create a work order, add jobs or enter commercial charges in one step.

From this frame, you can create purchase order numbers to use for vendor repair and work orders can be printed from this page. It also uses vendor repair statuses and functionality.

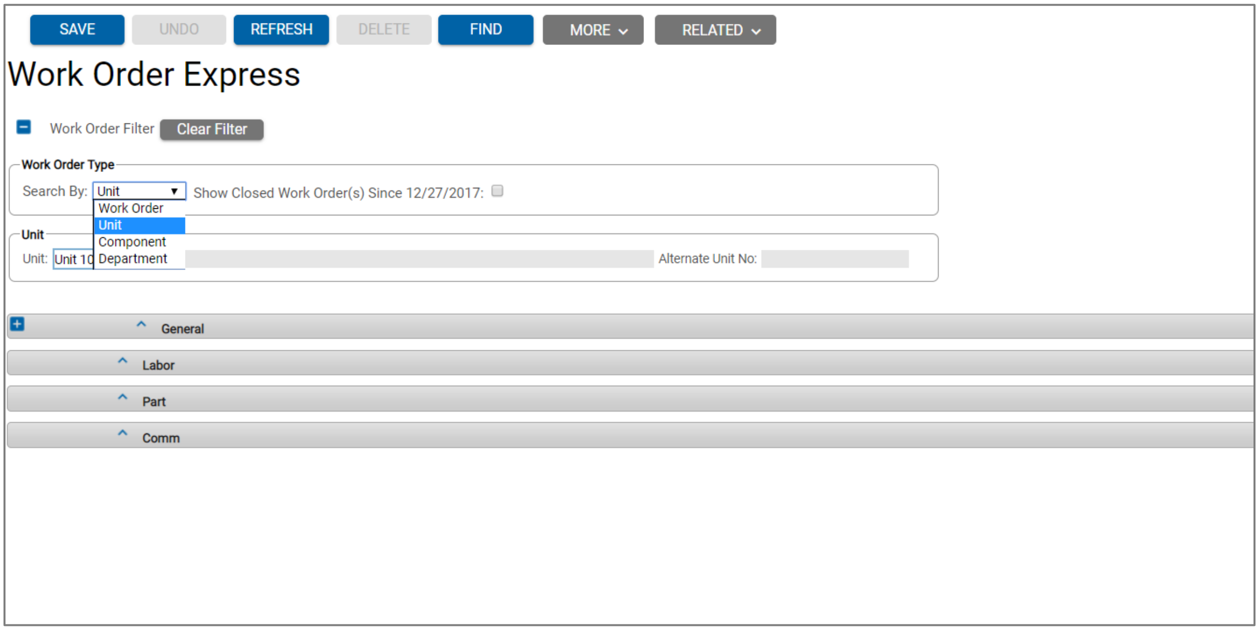
Work Requests can also assigned to a commercial work order from this frame.



17. Work Order Express Frame

The *Work Order Express* frame is a scaled down version of *Work Order Main* that allows you to create a work order while only filling out the minimum number of required fields. The frame is divided into four filter sections: *General*, *Labor*, *Part*, and *Commercial*.

When you first arrive on the frame, the top filter will display much like the filter outlined in the *Work Order Main* section. You can select the entity type for the work order (Unit, Department, or Component) and then enter or select the number from the list of values.



You can also use the **Clear Filter** button to select a new entity or search for a new work order.

You can create a new work order or open an existing one. The **+** and **–** icons can be used to expand or collapse the General, Labor, Part, and Commercial sections. Each section can also be expanded or collapsed individually with the **^** icon.

The following functionality is the available in the *Work Order Express* frame:

- **Standard Job History** - View work request, attachments and job notes.
- **Warranty Violations**, **Warranty Notes** - Complaint, cause and correction required if set by system flags.
- **Test Suites**
- Ability to change the **Visit Reason** (with the proper privilege).
- Cancel the **Work Order** (with the proper privilege).

Similarly to *Work Order Main*, you can add jobs using the **Work Request List** hyperlink, if outstanding work requests exist, or you can enter the jobs manually in the job section.

Information in the Labor, Part, and Commercial sections would be entered or selected in the same way as on *Work Order Main*.

You can use the **Complete**, **Close**, and **Cancel** buttons in the *General* section to update the work order status as necessary.

18. Updates

Release	Section	Description
23.1	4. Adding Jobs to a Work Order	Added Job Notes for new System Flag 5522.
23.2	All sections	Applied miscellaneous writing style updates throughout the document.
24.1	9. Completing a Work Order	Added a new image for Work Order Main. Added Signature information for completing a work order.