



Work Order

Application Training – User Guide

Version 24.x
Last Modified 24.1 | April 2024

© 2024 AssetWorks Inc., its subsidiaries and affiliates. All rights reserved.

Private and Confidential. Not for public dissemination.

Information contained in this document is proprietary to AssetWorks Inc. and may be used or disclosed only with written permission from AssetWorks Inc. This guide, or any part thereof, may not be reproduced without the prior written permission of AssetWorks Inc. This document refers to numerous products by their trade names. In most, if not all, cases these designations are claimed as Trademarks or Registered Trademarks by their respective companies. This document and the related software described in this manual are supplied under license or nondisclosure agreement and may be used or copied only in accordance with the terms of the agreement. The information in this document is subject to change without notice and does not represent a commitment on the part of AssetWorks Inc. The names of companies and individuals used in the sample database and in examples in the manuals are fictitious and are intended to illustrate the use of the software. Any resemblance to actual companies or individuals, whether past or present, is purely coincidental.

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.

Work Order - Application Training – User Guide

Version 24.x




Last Modified 24.1 | April 2024

Contents

1. Overview	1
2. What is a Work Order?	2
3. Creating a Work Order.....	3
Creating a Unit Work Order	3
Downtime	5
Creating a Component Work Order	6
Creating a Department Work Order.....	8
Department Requisitions	8
Department Work Orders.....	10
4. Adding Jobs to a Work Order	11
Work Request and Work Request Plan List	11
Adding a Job Manually	13
Job Detail and Change Job Visit Reason	15
Job Notes.....	17
Attachments.....	18
Warranty Jobs.....	19
Deferring a Job	20
5. Adding Labor to a Work Order.....	21
6. Adding Parts to a Work Order.....	23
7. Adding Commercial Charges to a Work Order.....	25
8. Adding Fluid Charges to a Work Order.....	26
9. Completing a Work Order.....	27
10. Closing a Work Order	29
11. Cancelling a Work Order	30
12. Modifying a Closed Work Order	31
13. Copying a Work Order	32
14. Printing a Work Order.....	33
15. Printing I-Frame Details from Work Order	34

16. Commercial Work Order Screen.....	35
17. Work Order Express Screen	36
18. Updates	38

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.

The screenshot shows the 'Work Order Main' interface. At the top, there is a row of buttons: 'SAVE' (orange), '8' (blue), 'REFRESH' (blue), 'DELETE' (grey), 'FIND' (blue), 'MORE' (grey with a dropdown arrow), and 'RELATED' (grey with a dropdown arrow). Below this is the title 'Work Order Main'. Under the title, there is a 'Work Order Filter' section with a 'Clear Filter' button. The main form is divided into several sections. The 'Work Order Type' section has a 'Search By: Unit' dropdown and a 'Show Closed Work Order(s) Since 12/28/2017:' checkbox. The 'Unit' section displays 'Unit: UNIT 107' and '2003 CHEVY C3500', with an 'Alternate Unit No.' field. The 'Start Work Order' button is highlighted with a callout '5'. The 'New Work Order' section has a 'Visit Reason:' dropdown with 'P' selected and 'PREVENTATIVE' displayed, and a 'Manual Work Order Number:' field. The 'Work Order Start Date:' field shows '12/28/2018 15:10:06' and is highlighted with a callout '7'. At the bottom, there is a tabbed interface with tabs for 'General', 'Job', 'Labor', 'Part', 'Comm', and 'Fluid'. The 'General' tab is selected.

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.

Work Order Filter **Clear Filter** WO No: 533118968 Unit No: UNIT 107 Alternate Unit No:

General Job Labor Part Comm Fluid

[Work Request List \(0\)](#) [Work Request Plan List \(0\)](#)

Work Order Information

Unit: UNIT 107 2003 CHEVY C3500 Unit Status: Inactive VIN:

WO Number: 533118968 WO Status: OPEN Location: FM

Visit Information

Reason: P PREVENTATIVE

Open: 12/28/2018 15:10:06 [View History](#)

Completed: [View History](#)

Closed: [View History](#)

Due: [View History](#)

Due Date Change Reason:

Downtime: 1 12/28/2018 15:10:06

WO Reference:

Parking Space:

Meter Information

Meter	Reading	Type
1	0	Mile(s)
2	0	Mile(s)

LTD Open Usage: 0

LTD Maint Cost: \$0.00

YTD Maint Cost: \$0.00

Contact Information

Name: Testing 123

Phone: (610)225-8331

Ext: 8331

[Notified:](#) [View History](#)

[Pickup:](#) [View History](#)

No Reserve Parts No Part Requests No Fault Codes N

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.

SAVE 3 **DO** **REFRESH** **DELETE** **FIND** **ATTACH** **MORE** **RELATED**

Work Order Suspend Downtime

Work Order

Number: 533118968

Status: OPEN

Location: FM FM Parking Location

Unit: UNIT 107 2003 CHEVY C3500

Suspend Downtime: 2 12/28/2018 15:20:45

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

Creating a Component Work Order

The screenshot shows the 'Work Order Main' interface. At the top, there are buttons: SAVE, UNDO, REFRESH, DELETE, FIND, MORE, and RELATED. Below these is the 'Work Order Main' title and a 'Work Order Filter' section with a 'Clear Filter' button. The 'Work Order Type' section has a 'Search By' dropdown menu with 'Component' selected (labeled 1). Below this is a 'Component' field (labeled 2) and a 'Department' field. A 'FIND' button (labeled 3) is located at the top right. The main form is divided into several sections: 'Work Order Information' (Component, WO Number, WO Status, Location, Comp Status, Serial No), 'Visit Information' (Reason, Open, Completed, Closed, Due, Due Date Change Reason, Downtime, Est Complete, WO Reference), 'Meter Information' (Name, Phone, Ext, Notified, Pickup), 'Contact Information' (Name, Phone, Ext, Notified, Pickup), and 'Cost Summary' (Limit, Labor, Material, Comm, Total, Total Est Cost, Hrs). There are also checkboxes for 'No Reserve Parts', 'No Part Requests', 'No Fault Codes', 'No Associated Tech Spec', 'No Warranty Claims', 'No Linked Job', and 'Equipment Condition'.

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.

The screenshot shows the 'Work Order Main' interface. At the top, there is a toolbar with buttons: SAVE (orange), 8 (blue), 0 (blue), REFRESH (blue), DELETE (grey), FIND (blue), MORE (grey with dropdown arrow), and RELATED (grey with dropdown arrow). Below the toolbar is the title 'Work Order Main'. Underneath is a 'Work Order Filter' section with a minus icon, the text 'Work Order Filter', and a 'Clear Filter' button. The main form area has several sections: 'Work Order Type' with a 'Search By:' dropdown set to 'Component' and a 'Show Closed Work Order(s) Since 12/28/2017:' checkbox; 'Component' with a dropdown set to '4' and a list of 'Component Number: B1' and 'Component A3'; 'Start Work Order' with a button labeled '5'; 'New Work Order' with a 'Visit Reason:' dropdown set to '6' (showing 'P' and 'PREVENTATIVE'), a 'Manual Work Order Number:' input field, and a 'Work Order Start Date:' field set to '7' (showing '12/28/2018 15:31:18'). At the bottom is a tabbed interface with tabs: General (active), Job, Labor, Part, Comm, and Fluid.

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 Order* 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

The screenshot displays the 'Work Order Department Requisitions' interface. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', and 'FIND'. Below these, the title 'Work Order Department Requisitions' is visible. On the left, there is a 'Requisition' section with a 'Number' field containing '125689'. A small box with the number '1' points to this field. Below the 'Requisition' section is a 'Requisition Settings Information' section with fields for 'Department Number', 'Direct Account Number', and 'Requisition Created'. A modal dialog box is open in the center, titled 'Action Required', with the message 'Department Requisition 125689 does not exist?'. It includes instructions: 'Press "Create" to create it.' and 'Press "Cancel" to enter a new value.' There are 'Create' and 'Cancel' buttons at the bottom of the dialog. A small box with the number '2' points to the 'Create' button.

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 exist. Select the **Create** button to confirm the action.

The screenshot shows a web form titled "Work Order Department Requisitions". At the top, there are buttons: "SAVE" (orange), "8" (blue), "REFRESH" (blue), "DELETE" (blue), and "FIND" (grey). The form is divided into two main sections. The first section, "Requisition", contains fields for "Number" (125689), "Description" (STREET SWEEPER RENTAL), and "Status" (Open). The second section, "Requisition Settings Information", contains fields for "Department Number" (0010), "Direct Account Number" (12-45-54-63), "Requisition Created" (12/29/2018), and "Open Work Order Count". Numbered callouts are placed over the form: 3 points to the Description field, 4 points to the Status dropdown, 5 points to the Department Number field, 6 points to the Direct Account Number field, 7 points to the Requisition Created field, and 8 points to the SAVE button.

SAVE 8 REFRESH DELETE FIND

Work Order Department Requisitions

Requisition

Number: 125689 Description: STREET SWEEPER RENTAL Status: Open ▼

Requisition Settings Information

Department Number: 0010 EXECUTIVE

Direct Account Number: 12-45-54-63

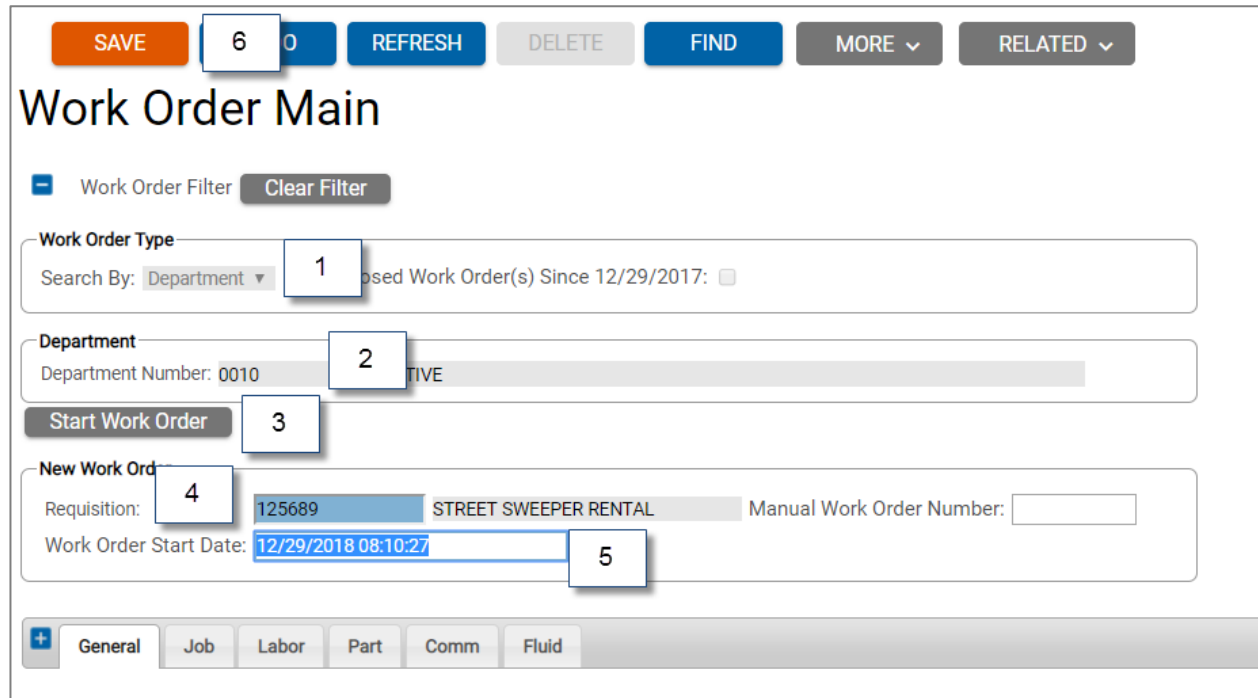
Requisition Created: 12/29/2018 Open Work Order Count:

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.



The screenshot shows the 'Work Order Main' interface. At the top, there are buttons: 'SAVE' (orange), '6' (blue), 'REFRESH' (blue), 'DELETE' (grey), 'FIND' (blue), 'MORE' (grey with a dropdown arrow), and 'RELATED' (grey with a dropdown arrow). Below these is the title 'Work Order Main'. A 'Work Order Filter' section includes a 'Clear Filter' button. The 'Work Order Type' section has a 'Search By' dropdown set to 'Department' (callout 1) and a checkbox for 'Closed Work Order(s) Since 12/29/2017:'. The 'Department' section has a 'Department Number' field with '0010' (callout 2) and a 'FIND' button. Below this is a 'Start Work Order' button (callout 3). The 'New Work Order' section has a 'Requisition' field with '125689' (callout 4) and a dropdown for 'STREET SWEEPER RENTAL'. It also has a 'Manual Work Order Number' field. The 'Work Order Start Date' field shows '12/29/2018 08:10:27' (callout 5). At the bottom, there are tabs: 'General' (selected), 'Job', 'Labor', 'Part', 'Comm', and 'Fluid'.

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 **WUNITALL – 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**.

SAVE

UNDO

REFRESH

DELETE

FIND

ATTACH

MORE ▾

RELATED ▾

Work Order Main

+

Work Order Filter

Clear Filter

WO No: 533118966

Unit No: UNIT 106

Alternate Unit No:

+

General

Job

Labor

Part

Comm

Fluid

[Work Request List \(1\)](#)
[Work Request Plan List \(1\)](#)

Work Order Information

Unit: UNIT 106 2003 CHEVY C3500 Unit Status: Inactive VIN:

WO Number: 533118966 WO Status: OPEN Location: FM

Visit Information

Reason: P PREVENTATIVE
Open: 12/28/2018 11:20:07
Completed:
Closed:
Due:
Due Date Change Reason:
Downtime: 12/28/2018 11:20:07
WO Reference:
Parking Space:

Meter Information

Meter	Reading	Type
1	0	Mile(s)
2	0	Mile(s)

LTD Open Usage: 0
LTD Maint Cost: \$0.00
YTD Maint Cost: \$0.00

Contact Information

Name: Testing 123
Phone: (610)225-8331
Ext: 8331
Notified:
Pickup:

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.

Adding Jobs to a Work Order

The screenshot shows the 'Work Order Main' interface. At the top, there are buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, MORE, and RELATED. Below these is the 'Work Order Filter' section with fields for 'Clear Filter', 'WO No: 533118966', 'Unit No: UNIT 106', and 'Alternate Unit No:'. A tab bar below the filter shows 'Job', 'Labor', 'Part', 'Comm', and 'Fluid'. The 'Job' tab is selected. A 'Work Request List (Loaded 1 Records)' pop-up is open, showing a table with columns: Add, Job, Description, Quote No, Visit Reason, Due Date, Location, Priority, Hrs, Cost, and Locked?. The first row has a checked checkbox in the 'Add' column, '66-00-001' in the 'Job' column, and 'CLEAN FOR SERVICE' in the 'Description' column. Above the table is a 'Select All' button. Below the table are 'Save' and 'Cancel' buttons. To the left of the pop-up, the 'Work Order Info' section shows 'Unit: UNIT 1' and 'WO Number: 533118'. Below that is the 'Visit Information' section with fields for Reason, Open, Completed, Closed, Due, Due Date Change Reason, Downtime, WO Reference, and Parking Space. The 'Downtime' field is filled with '12/28/2018 11:20:07'. To the right of the pop-up, there are fields for Phone, Ext, and Pickup, and a summary section with Material, Comm, Total, Total Est Cost, and Hrs.

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.

The screenshot shows the 'Work Order Main' interface. At the top, there are buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, MORE, and RELATED. Below these is the 'Work Order Main' title and a 'Work Order Filter' section with fields for 'WO No: 533118968', 'Unit No: UNIT 107', and 'Alternate Unit No:'. A tab bar at the bottom includes 'General', 'Job', 'Labor', 'Part', 'Comm', and 'Fluid'. The 'Job' tab is selected. A dialog box titled 'Action Required' is open, displaying the message: 'This field supports multiple "List of Values". Please select the desired format.' It lists two options: '1 - List of Job Codes' and '2 - List of Standard Jobs for the Tech Spec'. A 'Cancel' button is at the bottom of the dialog. In the background, a table with columns like 'Job', 'Location', 'Status', 'Complete Date', 'Job Rsn', 'Incident Number', 'Est Hrs', 'Book Time Vendor', and 'Est Cost' is visible. Numbered callouts 1, 2, and 3 are present: 1 points to the 'Job' input field, 2 points to the 'FIND' button, and 3 points to the 'List of Job Codes' option in the dialog.

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).

Job Code List Of Values

JOB CODE is a short hand way to specify repair activities. It is made up of the combination of a WORK ACCOMPLISHED CODE (WAC) and a SYSTEM CODE or a SYSTEM and COMPONENT CODE, e.g. adjust brakes might be 07-13.
Construct the job code by selecting the pieces below.

7

Job: 01-00-001 REPAIR FOR SERVICE OK Cancel

Work Accomplished	System	Component
01 - REPAIR 02 - INSPECT 03 - REMOVE/REPLC 05 - PERFORM 06 - PREP SERVICE 08 - DO THIS 09 - TROUBLESHOOT 20 - TRANSPORT 22 - EZ PASS 30 - TOWING 38 - ANC 40 - TRAVEL TIME 57 - TESTING 66 - CLEAN 70 - REPEAT REPR 73 - PREP SALE 76 - TEST DT 77 - VENDOR WORK CK - CHECK	00 - COMPLETE UNIT 01 - AIR CONDITIONING, HEAT, VENT 02 - CAB & SHEET METAL 03 - INSTRUMENTS, GAUGES, METERS 04 - MOBILE DEVICES 08 - unit changes 10 - CHASSIS 11 - AXLE - FRONT 111 - testing 12 - AXLE - REAR 13 - BRAKES 14 - FRAME 15 - STEERING 16 - SUSPENSION 17 - TYRES, TUBES, LINERS & VALVES 18 - WHEELS, RIMS, HUBS & BEARINGS 20 - DRIVE TRAIN GROUP 21 - AXLES - DRIVEN, FRONT 22 - AXLES - DRIVEN, REAR	001 - FOR SERVICE 004 - REQ POS CODE 999 - FOR DISPOSAL

4 5 6

Search ☐ Show all components

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.

SAVE 13 REFRESH DELETE FIND ATTACH MORE RELATED

Work Order Main

+ Work Order Filter Clear Filter WO No: 533118968 Unit No: UNIT 107 Alternate Unit No:


+ General Job Labor Part Comm Fluid


Job Information (New record number 1) ☒ Depress to select/unselect all jobs.


Job	Description	Zonar	Location	Status	Complete Date	Job Rsn	Incident Number	Est Hrs	Book Time Vendor	Est Cost
01-00-001	REPAIR FOR SERVICE	-	FM	WFA		P		0	0	\$0.00
8	9	-	10	11		12				

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

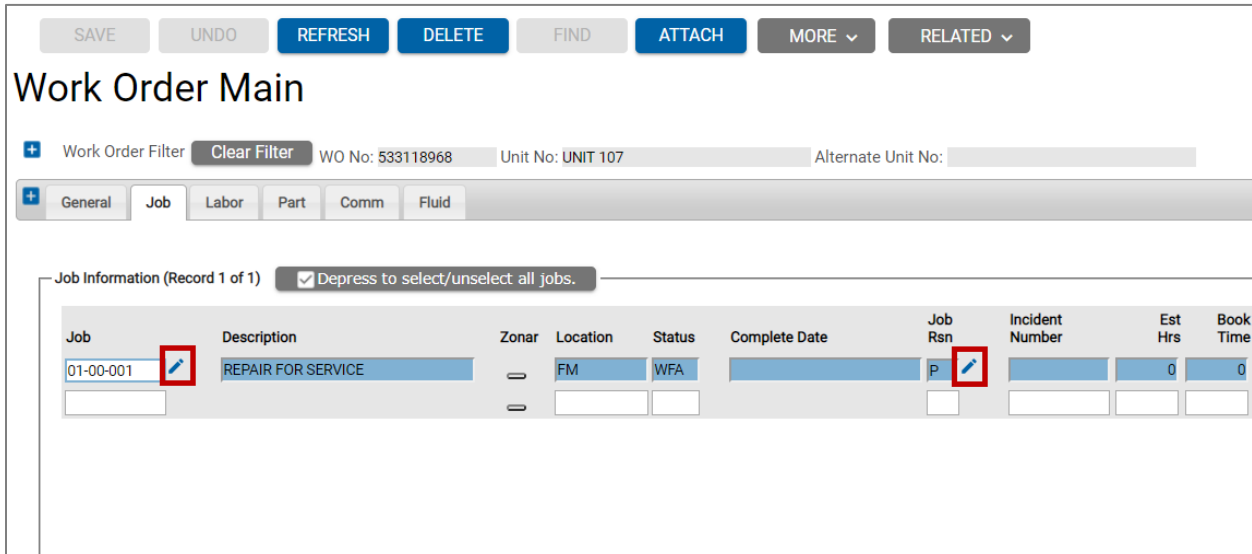
10. The **Location** will default to the Work Order location.
11. The **Status** will update to WFA (waiting for assignment).
12. A **Job Reason** must be entered and is a required field.
13. Select the **SAVE** button.

 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 screenshot shows the 'Work Order Main' interface. At the top, there are buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, MORE (dropdown), and RELATED (dropdown). Below these is a 'Work Order Filter' section with a 'Clear Filter' button and input fields for 'WO No: 533118968', 'Unit No: UNIT 107', and 'Alternate Unit No:'. A tabbed interface below the filter shows 'General', 'Job' (selected), 'Labor', 'Part', 'Comm', and 'Fluid'. The 'Job Information (Record 1 of 1)' section has a checkbox 'Depress to select/unselect all jobs.' checked. Below this is a table with columns: Job, Description, Zonar, Location, Status, Complete Date, Job Rsn, Incident Number, Est Hrs, and Book Time. The first row shows job '01-00-001' with description 'REPAIR FOR SERVICE', location 'FM', status 'WFA', and job reason 'P'. Red boxes highlight the pencil icons next to the job code and job reason.

Job	Description	Zonar	Location	Status	Complete Date	Job Rsn	Incident Number	Est Hrs	Book Time
01-00-001	REPAIR FOR SERVICE	-	FM	WFA		P		0	0

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.

Adding Jobs to a Work Order

SAVE UNDO REFRESH DELETE FIND ATTACH MORE ▾ RELATED ▾

Job Detail

Job Detail
Job: 01-00-001 REPAIR FOR SERVICE
Open Date: 12/29/2018 08:43:41 ⓘ
Crew Size: 0
Priority: 2
Job Quantity: 0
Preferred: 12/29/2018 08:43:41 ⓘ
Planning Date: 12/29/2018 ⓘ
Schedule Shift: 3 LATE
Standard Time: 0 Hour(s)
Standard Cost:
Work Request Number:
Campaign Number:
Warranty: ☐

Additional Information
Source: Symptom:

+ Estimate

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

SAVE UNDO REFRESH DELETE FIND ATTACH MORE ▾ RELATED ▾

Change Job Visit Reason

Job Detail
Job: 01-00-001 REPAIR FOR SERVICE
Job Status: WFA
Job Quantity: 0
Work Request Number:
Visit Reason: PREVENTIVE MAINT - S ⓘ
Submit Cancel

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.

The screenshot shows a horizontal toolbar with several icons and labels. From left to right, the labels are: 'Test Suites', 'Attach', 'Note', 'Warr Notes', 'Warr Violation', 'Print', 'Bill Fixed', 'Ext Data', 'Project Code', and 'Accident Number'. The 'Note' icon, which depicts a document with a pencil, is highlighted with a red rectangular box. Below the labels are corresponding input fields or checkboxes. For example, 'Warr Violation' has a checkbox, 'Print' has a checked checkbox, and 'Ext Data', 'Project Code', and 'Accident Number' have text input fields.

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.

The screenshot shows the 'Work Order Note Editor' window. At the top, there is a toolbar with buttons: 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', 'ATTACH', 'MORE', and 'RELATED'. Below the toolbar, the title 'Work Order Note Editor' is displayed, followed by 'Work Order Number: 533118968'. The main section is titled 'Notes for job 01-00-001 - REPAIR FOR SERVICE.' and contains a table of notes. The table has columns for 'Note Text', 'Locked', 'Except', and 'Change Information'. The first two rows of notes are 'Visit Reason Changed On 12/29/2018 6:03 AM By 4141' and 'Visit Reason Changed On 12/29/2018 6:14 AM By 4141'. The third row is a text input field with the text 'Job due by end of week at the latest,'. The 'Change Information' column shows the last changed date and time for each entry, along with the user '4141'.

Note Text	Locked	Except	Change Information
Visit Reason Changed On 12/29/2018 6:03 AM By 4141	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Entry 1 last changed on 12/29/2018 09:03:41 by 4141
Visit Reason Changed On 12/29/2018 6:14 AM By 4141	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Entry 2 last changed on 12/29/2018 09:14:40 by 4141
Job due by end of week at the latest,	<input type="checkbox"/>	<input type="checkbox"/>	

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 screenshot shows a work order interface. At the top, there is a toolbar with buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH (highlighted with a red box), MORE, and RELATED. Below the toolbar is a table with columns: Est Hrs, Book Time, Vendor, Est Cost, Priority, Act Hours, Labor Charge, Part Charge, Comm Charge, Assignment, Test Suites, Attach (highlighted with a red box and a paper clip icon), Note, and Warr Notes. The first row of the table contains values: 0, 0, , \$0.00, 2, 0.00, \$0.00, \$0.00, \$0.00, , , , , .

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.

The screenshot shows a dialog box titled "Show Attachments". It contains the text: "Attached to: Work Order 533118968" and "Key: 533118968~01-00-001 (REPAIR FOR SERVICE)". Below this is a table titled "Existing Attachments (Loaded 1 records)".

Command	Description	Type	Uploaded By	Date Uploaded
Open	Inspection Checklist (State Emissions)	docx	THOMAS.BELSKIE	12/29/2018

At the bottom of the dialog box, there are three links: "Attach a new file.", "Attach a web address.", and "Attach a previously upload file or web address.". There are also "OK" and "Cancel" buttons.

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).

Book Time	Vendor	Est Cost	Priority	Act Hours	Labor Charge	Part Charge	Comm Charge	Assignment	Test Suites	Attach	Note	Warr Notes	Warr Violation	Print	Bill Fixed
0		\$0.00	2	0.00	\$0.00	\$0.00	\$0.00						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

Warranty Violation

Violation Type: _____

Job: Work Order: 533118968 Unit/Dept/Comp Number: UNIT 107 Job: 01-00-001

Cancel or Update

Options:

- ☒ Update the warranty notes
- ☐ Cancel the warranty

Update/Cancel User

User: _____

Password: _____

Reason: _____

Complaint Notes for Warranty

Note Text	Locked	Change Information
Warranty violation reported.	<input type="checkbox"/>	Entry 1 last changed on 12/29/2018

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.

The screenshot shows the 'Work Order Main' interface. At the top, there are buttons: SAVE, 2, REFRESH, DELETE, FIND, ATTACH, MORE, and RELATED. Below these is the 'Work Order Main' title. A filter bar shows 'Work Order Filter' with a 'Clear Filter' button and fields for 'WO No: 533118968', 'Unit No: UNIT 107', and 'Alternate Unit No:'. Below the filter bar are tabs: General, Job, Labor, Part, Comm, and Fluid. The 'Job' tab is selected. Under 'Job Information (Record 1 of 1)', there is a checkbox 'Depress to select/unselect all jobs.' and a 'MAKE WORK REQUEST' button. Below this is a table with columns: Job, Description, Zonar, Location, Status, Complete Date, Job Rsn, Incident Number, Est Hrs, Book Time, Vendor, and Est Cost. The first row shows Job '01-00-001', Description 'REPAIR FOR SERVICE', Zonar '-', Location 'FM', Status 'WR', Complete Date, Job Rsn 'P', Incident Number, Est Hrs '0', Book Time '0', Vendor, and Est Cost '\$0.00'. A callout box with the number '1' points to the 'Status' field.


Job	Description	Zonar	Location	Status	Complete Date	Job Rsn	Incident Number	Est Hrs	Book Time	Vendor	Est Cost
01-00-001	REPAIR FOR SERVICE	-	FM	WR		P		0	0		\$0.00

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.

The screenshot shows the 'Work Order Main' interface. At the top, there are buttons: SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, MORE, and RELATED. Below these is the 'Work Order Main' title. A 'Work Order Filter' section contains a 'Filter' button (callout 1), 'WO No: 533118968', 'Unit No: UNIT 107', and 'Alternate Unit No:'. Below the filter is a tabbed interface with 'General', 'Job', 'Labor' (selected), 'Part', 'Comm', and 'Fluid'. The 'Labor' tab shows 'Labor Charge Information (New record number 1)'. A table with columns: Job, Description, Employee No, Name, Position, Time Date/Time In, Date/Time Out, and Time Type. The 'Job' field (callout 2) has a dropdown menu open showing '01-00-001 - REPAIR FOR SERVICE' (callout 3). At the top right of the table area is a 'FIND' button (callout 4).

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.

The screenshot shows the 'Work Order Main' interface with the 'Labor' tab selected. The 'Labor Charge Information (New record number 1)' section displays a table with the following data: Job: 01-00-001, Description: REPAIR FOR SERVICE, Employee No: 00001, Name: BILL SMITH, Position: 1, Time Date/Time In: 12/30/2018 08:00:00, Date/Time Out: 12/30/2018 13:00:00, Time Type: RT, Pay Class: 1, Pay Step: 01. Callouts 5 through 14 highlight various fields and buttons: 5. Job field, 6. Position field, 7. Time Date/Time In field, 8. Date/Time Out field, 9. Time Type field, 10. Pay Class field, 11. Pay Step field, 12. Supervisor Approval checkbox, 13. Labor Note button, 14. Labor Note 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.

The screenshot displays the 'Work Order Main' interface. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', 'ATTACH', 'MORE', and 'RELATED'. Below these, the 'Work Order Filter' section shows 'Clear Filter', 'WO No: 533118968', 'Unit No: UNIT 107', and 'Alternate Unit No:'. A tabbed interface below shows 'General', 'Job', 'Labor', 'Part', 'Comm', and 'Fluid', with 'Part' currently selected. The 'Material Calculations' section shows 'Inventory Location: FM', 'Total Cost: \$145.18', 'Total Tax: \$1.67', 'Total Discount: \$0.00', and 'Total Extended Cost: \$146.85'. The 'Stock Part Charge Information (Loaded 1 records)' section has a 'Reserve Parts (0)' button and a table with the following data:

Job	Description	Part Number	Effective Date	Employee Number	Qty	Unit Cost	Core Cost	Extended Cost	Print Tag	Charge Core	Fail Code	Ref No	PRO Number	Position
01-00-001	REPAIR FOR SERVICE	01-002	12/30/2018 09:56:37	00001	2	\$72.59	\$15.00	\$146.85	<input type="checkbox"/>	<input type="checkbox"/>	PF0005			

- 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.
- 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.
- Enter a valid **Employee** number.
 This will be required if System Flag 5013 is set to **Y**.
- Enter the **Quantity** of the part being issued.
 The maximum quantity that can be issued is controlled by System Flag 2037.
- A **Failure Code** will be required if System Flag 5015 is set to **Y**.
- A **Position Code** will be required if System Flag 5016 is set to **Y**.
- 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.

The screenshot shows the 'Work Order Main' interface. At the top, there are buttons: SAVE (orange), UNDO, REFRESH, DELETE, FIND, ATTACH, MORE (dropdown), and RELATED (dropdown). Below these is the 'Work Order Main' title. A 'Work Order Filter' section includes a 'Clear Filter' button and input fields for 'WO No: 533118968', 'Unit No: UNIT 107', and 'Alternate Unit No:'. Below the filter is a tabbed interface with 'General', 'Job', 'Labor', 'Part', 'Comm', and 'Fluid' tabs. The 'Fluid' tab is selected. Below the tabs is a section titled 'Fluid Charge Information (New record number 1)' containing a table with the following columns: Job, Description, Job Location, Issue Date, Hose, Product, Quantity, Unit Cost, Extended Cost, and Employee. The first row of the table contains the following data: Job: 01-00-001, Description: REPAIR FOR SERVICE, Job Location: FM, Issue Date: 12/30/2018 11:09:30, Hose: (empty), Product: (empty), Quantity: (empty), Unit Cost: (empty), Extended Cost: (empty), and Employee: (empty).

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.
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.



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



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.

Work Order Main

Work Order Filter

Clear Filter

Work Order Search

☐ Show Closed Work Order(s) Since 05-Apr-2023:

Unit/Department/Component or Work Order Number:

+

General

Job

Labor

Part

Comm

Fluid

Work Order Information

WO Status:

Location:

Visit Information

Reason:

Open:

Completed:

Complete

Closed:

Closed

Due:

Downtime:

Est Complete:

WO Reference:

Parking Loc:

Meter Information

LTD Open Usage:

LTD Maint Cost:

FTD Maint Cost:

Contact Information

Name:

Phone:

Ext:

Notified:

Pickup:

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.

The screenshot shows the 'Work Order Main' interface. At the top, there is a toolbar with buttons: SAVE, 2, REFRESH, DELETE, FIND, ATTACH, MORE, and RELATED. Below the toolbar, the 'Work Order Main' title is followed by a 'Work Order Filter' section with a 'Clear Filter' button and input fields for 'WO No: 533118968', 'Unit No: UNIT 107', and 'Alternate Unit No:'. Below this is a tabbed interface with 'General' selected. The 'General' tab contains several sections: 'Work Order Information' (Unit: UNIT 107, 2003 CHEVY C3500, Unit Status: Inactive, VIN:), 'Visit Information' (Reason: P PREVENTATIVE, Open: 12/28/2018 15:10:06, Completed: 12/30/2018 11:17:22, Closed: 12/30/2018 11:30:58, Due: 12/30/2018 11:30:58, Due Date Change Reason: 12/28/2018 15:23:33, Downtime: 12/28/2018 15:23:33, WO Reference: , Parking Space:), 'Meter Information' (Meter, Reading, Type table with 2 rows), 'Contact Information' (Name: Testing 123, Phone: (610)225-8331, Ext: 8331, Notified: , Pickup:), and 'Cost Summary' (Limit: \$0.00, Labor: \$254.17 Hrs: 5.00, Material: \$146.85, Comm: \$841.50, Total: \$1,242.52, Total Est Cost: \$0.00 Hrs: 0.00). At the bottom, there are checkboxes for 'No Reserve Parts', 'No Part Requests', 'No Fault Codes', 'No Associated Tech Spec', 'No Warranty Claims', 'No Linked Job', 'Equipment Condition:', and 'Bin No:'.

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.

The screenshot shows the 'Work Order Main' interface. At the top, there is a toolbar with buttons: SAVE, UNDO, REFRESH, DELETE (highlighted with a '1'), FIND, ATTACH, MORE, and RELATED. Below the toolbar, the 'Work Order Main' title is followed by a '1' in a box. A 'Work Order Filter' section is visible. A confirmation pop-up is displayed in the center, titled 'Action Required'. The pop-up text reads: 'Are you sure you want to cancel Work Order 533118971?' (with a '2' pointing to the question), 'Press "Proceed" to confirm the cancel.', and 'Warning: This action cannot be undone.' Below the text are 'Proceed' and 'Cancel' buttons. The 'Proceed' button is highlighted with a '3' in a box. The background interface shows various sections: 'Work Order Information' (Unit: UNIT 107, WO Number: 533118971), 'Visit Information' (Reason: P PREVENTA, Open: 12/30/2018 11:37:29), 'Meter Information' (Table with 3 rows), 'Contact Information' (Name: Testing 123, Phone: (610)225-8331), and 'Cost Summary' (Limit: \$0.00, Labor: \$0.00, Material: \$0.00, Comm: \$0.00, Total: \$0.00, Total Est Cost: \$0.00).

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

SAVE
2
REFRESH
DELETE
FIND
ATTACH
MORE
RELATED

Work Order Main

Work Order Filter
Clear Filter
WO No: 533118968
Unit No: UNIT 107
Alternate Unit No:

General
Job
Labor
Part
Comm
Fluid

[Work Request List \(0\)](#)
[Work Request Plan List \(0\)](#)

Work Order Information

Unit: UNIT 107 2003 CHEVY C3500 Unit Status: Inactive VIN:
WO Number: 533118968 WO Status: CLOSED Location: FM Adjust Closed WO: 1 ACCOUNTING ADJUST

Visit Information

Reason: P PREVENTATIVE
Open: 12/28/2018 15:10:06
Completed: 12/30/2018 11:17:22
Closed: 12/30/2018 11:30:53
Due:
Due Date Change Reason:
Downtime: 12/28/2018 15:23:33
WO Reference:
Parking Space:

Meter Information

Meter	Reading	Type
1	0	Mile(s)
2	0	Mile(s)

LTD Open Usage: 0
LTD Maint Cost: \$1,250.52
YTD Maint Cost: \$1,250.52

Contact Information

Name: Testing 123
Phone: (610)225-8331
Ext: 8331
Notified:
Pickup:

Cost Summary

Limit: \$0.00
Labor: \$254.17 Hrs: 5.00
Material: \$146.85
Comm: \$849.50
Total: \$1,250.52
Total Est Cost: \$0.00 Hrs: 0.00

No Reserve Parts No Part Requests No Fault Codes
Equipment Condition:
Bin No:

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

SAVE UNDO REFRESH DELETE FIND

Work Order Copy

Existing Work Order

Number: 533118968 Description: UNIT 107 - 2003 CHEVY C3500

Existing Unit

Number: UNIT 109 2003 CHEVY C3500

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

SAVE

UNDO

REFRESH

DELETE

FIND

ATTACH

MORE

List of Work Order Test Suites.

Work Order Notes.

Cost Detail Report.

Part Issue Audit Ticket Report.

Selected Part Tag Report.

Work Order Report.

RELATED

Work Order Main

+

Work Order Filter

Clear Filter

WO No: 533118968

Unit No: UNIT 107

+

General

Job

Labor

Part

Comm

Fluid

[Work Request List \(0\)](#)
[Work Request Plan List \(0\)](#)

Work Order Information

Unit: UNIT 107

2003 CHEVY C3500

Unit Status: Inactive

VIN:

WO Number: 533118968

WO Status: CLOSED

Location: FM

Adjust Closed WO:

Visit Information

Reason: P PREVENTATIVE

Open: 12/28/2018 15:10:06

Completed: 12/30/2018 11:17:22

Closed: 12/30/2018 11:30:53

Due:

Due Date Change Reason:

Downtime: 12/28/2018 15:23:33

WO Reference:

Parking Space:

View History

Meter Information

Meter	Reading	Type
1	0	Mile(s)
2	0	Mile(s)

LTD Open Usage: 0

LTD Maint Cost: \$1,250.52

YTD Maint Cost: \$1,250.52

Contact Information

Name: Testing 123

Phone: (610)225-8331

Ext: 8331

Notified:

Pickup:

View History

View History

Cost Summary

Limit: \$0.00

Labor: \$254.17

Material: \$146.85

Comm: \$849.50

Total: \$1,250.52

Total Est Cost: \$0.00

No Reserve Parts

No Part Requests

No Fault Codes

No Associated Tech Spec

No Warranty Claims

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

The screenshot shows a software interface with a table of data. The table has the following columns: Cost, Extended Cost, Print Tag, Charge Core, Fail Code, Ref No, PRO Number, Position, and Print Ticket. The first row of data shows: 5.00, \$146.85, an empty checkbox, an empty checkbox, PF0005, and empty cells for the remaining columns. In the top right corner of the table, there is a red box containing a spreadsheet icon. An 'Options' menu is open, showing two options: 'Select for copy' (with a clipboard icon) and 'Print' (with a printer icon). The 'Print' option is highlighted by a red box.

Cost	Extended Cost	Print Tag	Charge Core	Fail Code	Ref No	PRO Number	Position	Print Ticket
5.00	\$146.85	<input type="checkbox"/>	<input type="checkbox"/>	PF0005				

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.

SAVE
UNDO
REFRESH
DELETE
FIND
MORE
RELATED

Commercial Work Order

Unit Information
Unit No: UNIT 101 2003 CHEVY C3500
Alt Unit No: 101 UNIT VIN: UNIT 101
Tech Spec: 03CHEC3EF60 2003 CHEVY 3500

No Warranty Coverage [View Standard Job History](#)
[View Unit Job History](#) [View Commercial WO History](#)
[Work Request Incident](#) [Work Request Incident Query](#)

Work Order Information
Work Order: 533118930 New WO WO Reason: P Open Date: 12/19/2018 10:19:00
Location: FM Status: OPEN Due Date:
Complete Date:
Closed Date:
WO Reference:
WO Lead Job Status: WAITING FOR ASSIGN
[View All Jobs On Work Order](#)

Meter Information

Meter	Reading	Type
1	10	MILE
2	10	MILE

Vendor Information
Vendor List (Record 1 of 1)

Vendor No	PO Number	Auth Amt	Contact	Phone	Ext
123		\$1,500.00	COMM WO CONTACT	12345(678)901-23	1234567890

At Vendor Date: 12/19/2018 10:19:00 Ordered By: THOMAS.BELSKIE Reference No:
Invoice No: Invoice Date: Charge WO Date:
Reconcile: Payment Type: Towing Amount: Towing Label:

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.