

ABC WORK ORDER SYSTEM

Instructions for Inputting MOT and Information & Technology Work Orders

Welcome to ABC Unified School District's inhouse Work Order System. These instructions are an introduction to the new WO system.

Due to the limited number of licenses for this application, we ask that you log out of the system once you have created and/or viewed your work orders. The system will automatically time out if not in use after a short time period.

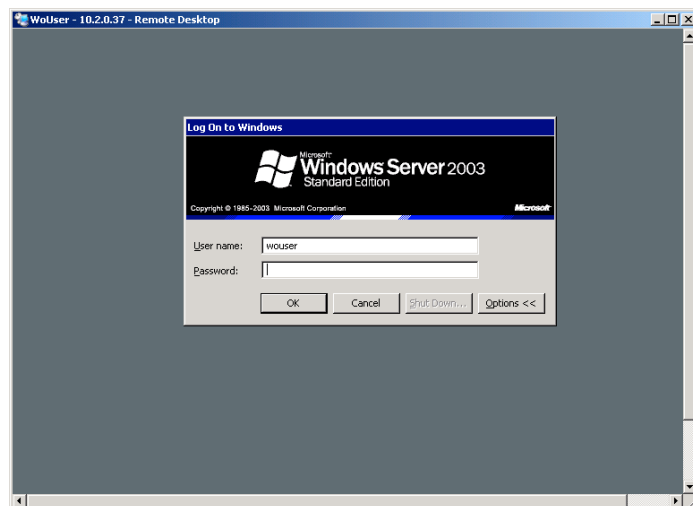
If you need further assistance, please contact Information & Technology at Ext. 21260.

Locate the Icon for the Work Order System and double click on it.



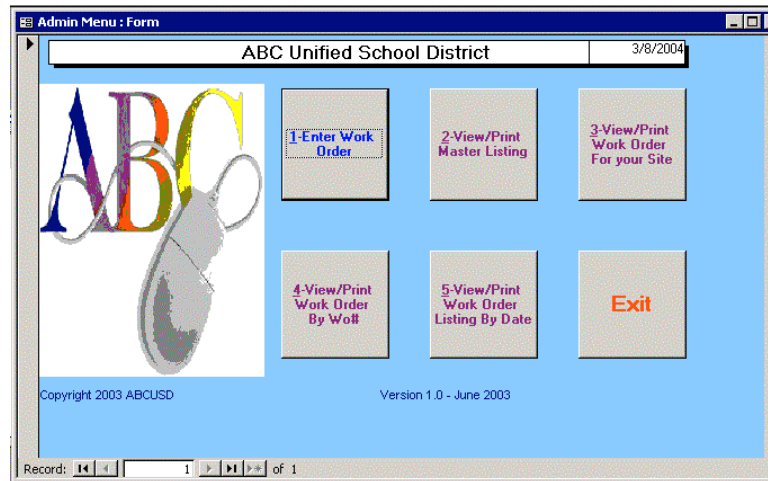
WoUser.Ink

Highlight the User Name
(Type in lowercase)
Type your login name and tab
Type your password
Click on OK



This is the main menu screen. There are six choices on this screen (see numbered buttons).

1 – Enter Work Order — Click to create a new work order or view existing work orders.



The **Workorders by School** screen appears and defaults to the user's site

The New Site button is not available because you are defaulted to your site.

WO #	Description	Date Rec'd	Date Closed	Total Cost
B000005	Transportation	1/7/2004		
D000001	Deferred Maintenance	1/6/2004		
D000002	Air Conditioning	1/7/2004		
D000003	Air Conditioning	1/7/2004		
M000001	Carpet/Tile	1/6/2004		\$333.21

Click on Workorders button to create a new WO

Work orders can be previewed for your site.

Switches back to main menu

WO Input Screen: The following is a description of the WO input screen. Please review all the fields. Press the tab key to go from field to field as you enter the work order information. The mouse can be used to move to a specific field. Be sure the STATUS field shows **OPEN**. (See field circled.) If not **OPEN**, select **OPEN**.

The screenshot shows the 'School Workorders' application window with a 'User Input' tab. The form contains various fields for entering work order information. A blue box highlights the main input area, and a black circle highlights the 'STATUS' field, which currently shows 'Open'. Below the form are several navigation buttons: 'Backward', 'Forward', 'Get', 'Add', 'Save', and 'Exit'. Callouts provide the following descriptions for these buttons:

- Backward:** Moves backward thru WOs
- Forward:** Moves forward thru WOs
- Get:** Gets specific WO
- Add:** ADD - gives blank WO screen ready for input or search
- Save:** Save WO if you make changes before you print it
- Exit:** Exits to previous screen

FIELD INFORMATION

Type	This is the type of work order you want to input. You can type the first letter of each selection or you can click on the drop down arrow and make your selection. (See Types of WO below.)
WO#	This field is filled in automatically. Please note your WO#.
Site#	This is an automatic field with your site number.
Date Recv	This is an automatic field with the date.
Date Req	Please input the request date if needed.
Entered by	Begin typing your first name and your whole name will appear automatically. If your first name is duplicated, type the first letter and click on the drop down arrow and select your name from the list.
Ext#	An automatic field with your extension which is associated with your name.
Bldg#	Input only if needed.
Room#	Input only if needed.
Cont Name	Input contact name other than your name.
Contact#	Input contact phone number.
Site Cost	This field will remain N if there is no site cost. If there is a site cost, please input Y and a Budget # field pops up from which you will select a budget number.
Equip#	Click on the down arrow and select the appropriate piece of equipment.
Equip Desc	This information shows up automatically after you have selected the equipment number.
Prob Code	The MOT and I.T. work order administrators only. End user will see after WO closed.
Problem Desc	Input a full description of the problem.
Comments	

*Types of WO:	**Prob Codes:	Garage General	PC Install	Video Cable
Buses	Air Conditioning	Maintenance	Phone Plumbing	Welding
Deferred Maintenance	Carpentry	Grounds	Printer	
Garage	Carpet/Tile	GroupWise	Roof	
Information & Technology	Custodial	Intrusion Alarm	Scanner	
Maintenance	Data Cable	Jack Repair	Sprinklers	
Operations	Eagle	Material Transfer	Server	
Preventive Maintenance	Electrical	Network	Software	
Material Transfer	Electronic	Painting	Transportation	

Now you are ready to input a work order for your site.

1. Click on the **Workorders** button.

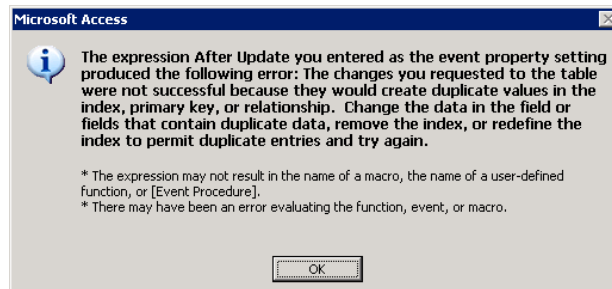
WO #	Description	Date Rec'd	Date Closed	Total Cost
B000005	Transportation	1/7/2004		
D000001	terred Maintenance	1/6/2004		
D000002	Air Conditioning	1/7/2004		
D000003	Air Conditioning	1/7/2004		
M000001	Carpet/Tile	1/6/2004		\$333.21

1. Click on **Add** to input a new work order.
2. You may get a new box that states: You can't go to the specific record. Simply press your Enter Key and then begin inputting your WO.
3. You can type the first letter of the type of work order or click on the pull down arrow for a list of types. Input the **TYPE** and press the tab key. This sets your WO #. And then do either of the following:
 - a. **Using the mouse:** Click on **SAVE** and then click on **BACKWARD** and finish completing your work order
 - b. **Using the keyboard:** ALT/S and then ALT/B
6. This will put you back in the WO screen at the Date Req: field. Input a date, if needed.
7. Input the information in the rest of the fields. Note: The **Entered by:** field – you can type the first couple of letters of your first name or click on the pull down arrow for a list of users at your site.
8. After you have completed your input, click on **SAVE** or hold down your **ALT** key and press the letter **A**.
9. **Exit** from this screen and **Exit** on the

Click on the **Exit** button and you will be back at the Main Menu

PLEASE NOTE: If you get this screen after you press tab to set your work order number, this means that more than one person tried to grab the same number at exactly the same instant. If this happens to you, please do the following:

Click **OK** on the box



At the School Workorder Screen:
Click on **Exit**

Click on **Workorders** button to go back into the screen to input a work order.
Click on **Add** and repeat the above Steps 1-9 on Page 5.

WU #	Description	Date Rec'd	Date Closed	Total Cost
0000005	Transportation	1/7/2004		
0000001	Tire Maintenance	1/5/2004		
0000002	Air Conditioning	1/7/2004		
0000003	Air Conditioning	1/7/2004		
M000001	Carpet/Tile	1/5/2004		\$332.21

This is a sample if the Site Cost is Y. If you change N to Y, then you will need to select a budget number. If it is a Garage work order, you will also need to select the Equipment#.

To see a
specific
WO

If you want to get a specific WO,
click on the **GET** button. The
Find in Field screen appears.

Type the **WO #** and the
Find What: box, click on
Find First button and
your WO pops up. Click
on CLOSE. You will be
able to see all the details
of that WO #.

Preview Workorders -- Click this button to preview WOs as they would be printed.

Workorders by School

Site ID: 20 Site Name: Aloha
 Address: 11737 E. 214th St. Contact: Lynda Telowath
 City: Lakewood Phone Number: 22500
 State: CA Fax Number: (1009)3297
 Zip Code: 90715

WO #	Date Rec'd	Date Closed	Total Cost
10000003	8/13/2003		\$0.00
10000001	8/13/2003		\$81.70
G0000002	8/13/2003		\$174.00
G0000002	8/13/2003		\$91.70
10000004	8/13/2003		

Workorders... **Preview Workorders...** Exit

To print WOs, select FILE, PRINT and the print screen pops up.

Microsoft Access - [Site Open Workorder]

Open Work Order

WOID: 1000003 Location: Aloha Tech:
 Program: Lynda Telowath Est: 22500 Budget: null
 Show Date: Printer
 Description:
 For printer:
 General Notes:
 General Info:
 Date Received: 8/13/2003 Date Requested: 8/15/2003
 Date Sent:
 Date Finished:
 Tasks:
 Comments:
 Work Order Item Table:
 Columns: Item Description, Quantity, Unit Cost, Name
 Page: 1 of 1
 Ready

You can click on the arrows to go back & forth thru pages to find a specific WO

- **Print one WO** — select the radial button PAGES and enter FROM and TO with the same page number.
- **Print range of WOs** — select radial button PAGES and enter the range of page numbers in the FROM and TO boxes.

Print

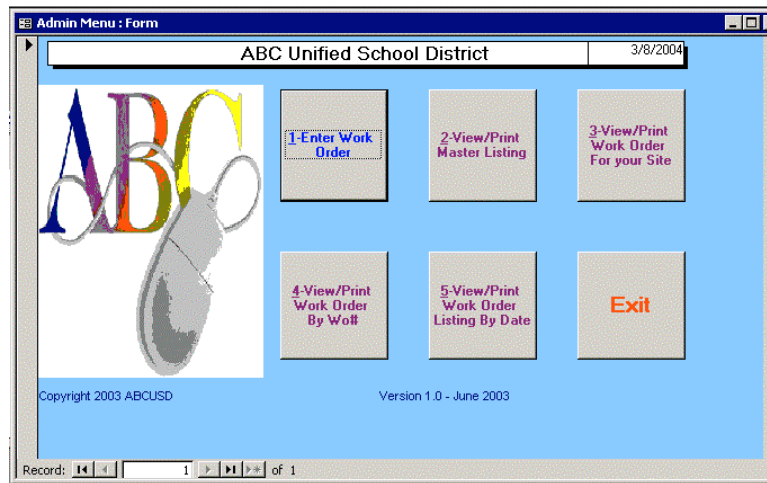
Printer:
 Name: Infohpq1 on ABCTREE (from GOOSJO) in se Properties
 Status: Ready
 Type: HP LaserJet 8100 Series P5
 Where: TS002
 Comment:
☐ Print to File

Print Range:
☐ All
☒ Pages From: 1 To: 1
☐ Selected Record(s)

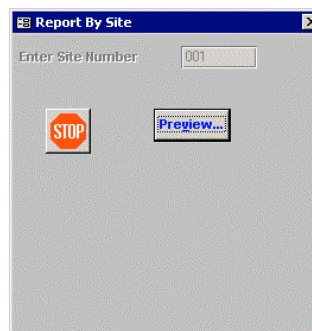
Copies:
 Number of Copies: 1
☒ Collate

Setup... OK Cancel

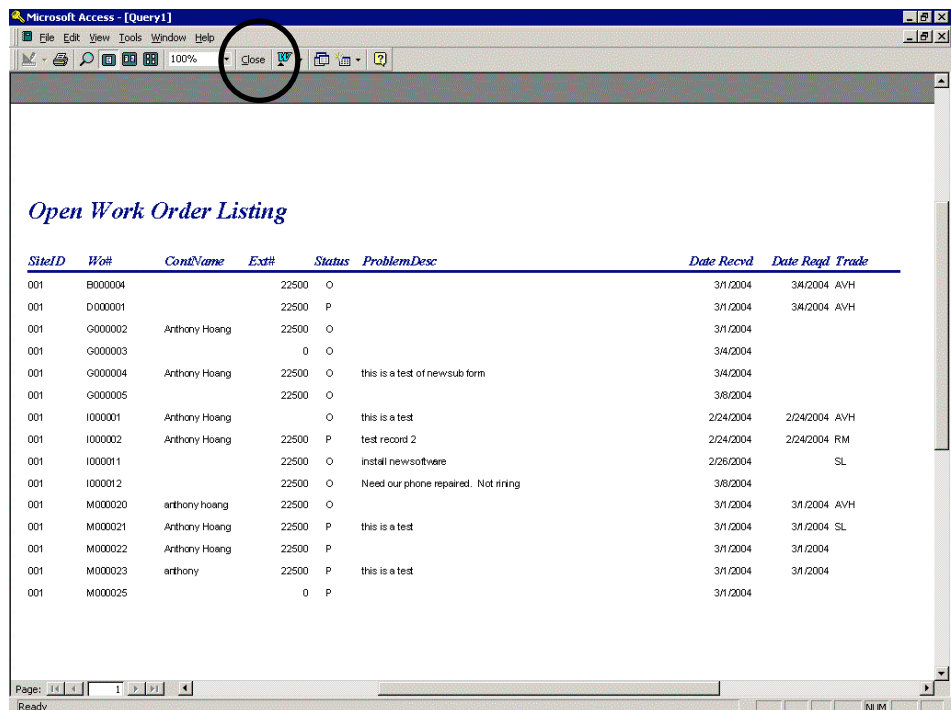
2 – View/Print Master Listing — This will allow you to view and print a master listing of the all work orders (Open, Pending, Closed) for your site



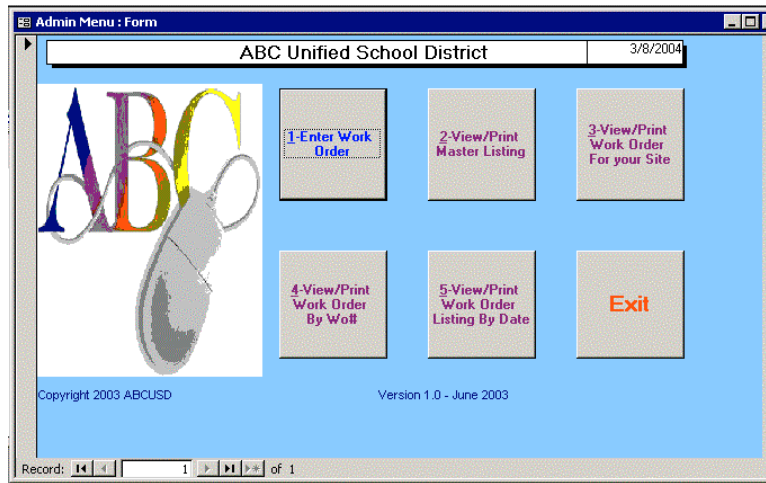
You are defaulted to your site.
Click on **Preview**



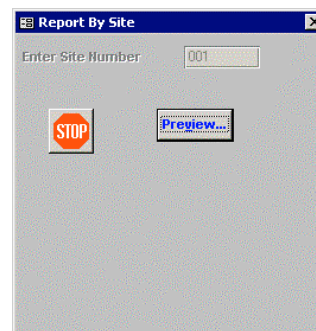
The Master Listing pops up and can now be printed.
After the Master Listing has printed, click on the **Close** button



3 – View/Print Work Order For your Site — Prints all types of WOs.

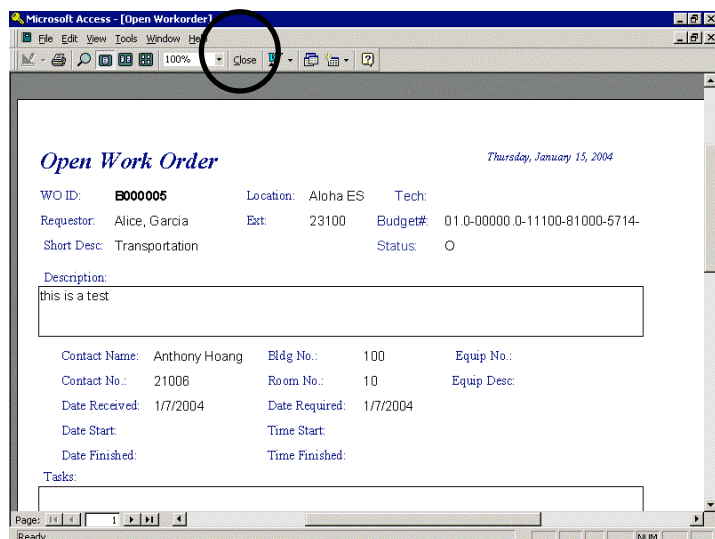


Defaulted to your Site Number.
Click the **Preview** button



All and/or specific Work Orders can now be printed. You can make your selection for specific pages to be printed after you click on the printer icon.

When you are finished with this report, click on the Close button. (See Page 7 for detailed instructions on printing specific work orders.)



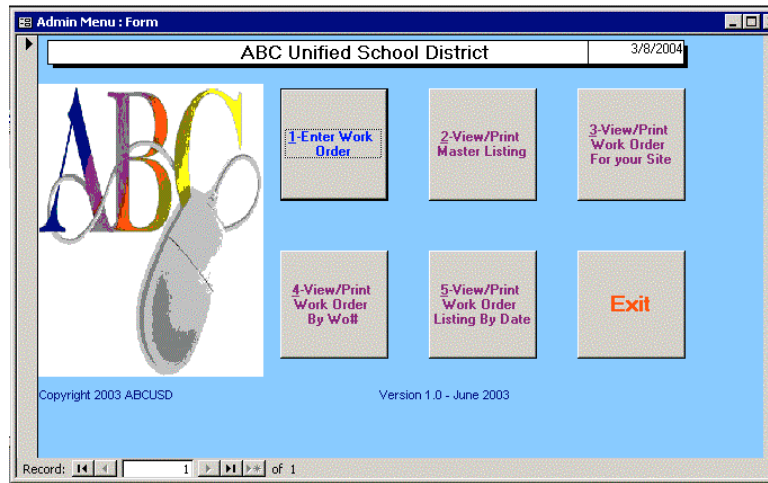
4 – View/Print Work Order by Wo# — Prints all types of WOs.

Enter the range numbers for:
Beginning WorkOrder
Ending WorkOrder

Note: If you only need one WO,
 you will need to type the number
 in both beginning and ending fields.

Print the WO(s) and click on the
Close button

5 – View/Print Work Order Listing by Date —.This will print work orders for a specific time period.



Type in the following:
From Enter Date
To Enter Date

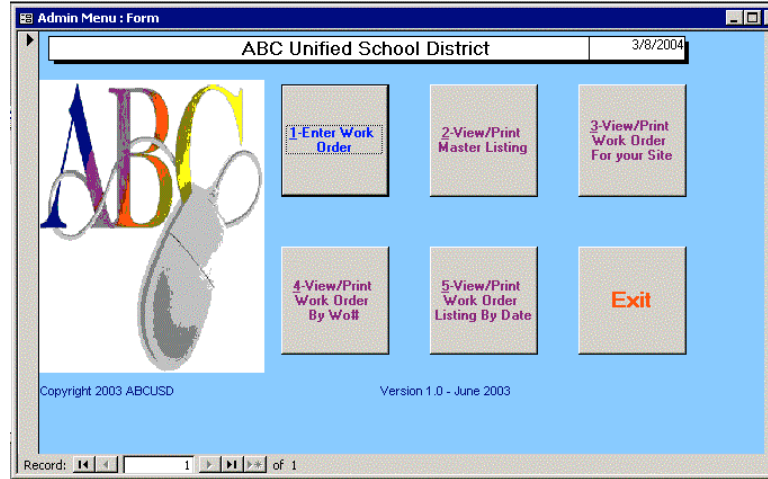
Note: You are defaulted to your site.

Will bring up the of work order listing for date range. Print the WOs and click on **CLOSE**

SiteID	WO#	Status	Short Desc	Long Desc	Budget#	Date Recd	Total Cost Trade
001	000000A	O	Transportation		01 0 000000 0-11 000 36 000 0 01 13 40 0000	3/8/2004	\$0.00 AVH
001	000000A	O	Transportation		01 0 000000 0-11 000 36 000 0 01 13 40 0000	3/8/2004	\$4.00 AVH
001	000000A	O	Transportation		01 0 000000 0-11 000 36 000 0 01 13 40 0000	3/8/2004	\$0.00 AVH
001	000000A	O	Transportation		01 0 000000 0-11 000 36 000 0 01 13 40 0000	3/8/2004	\$0.00 AVH
001	000000A	P	Excess		01 0 000000 0-11 000 36 000 0 01 13 40 0000	3/8/2004	\$0.00 AVH
						Total:	\$425.00

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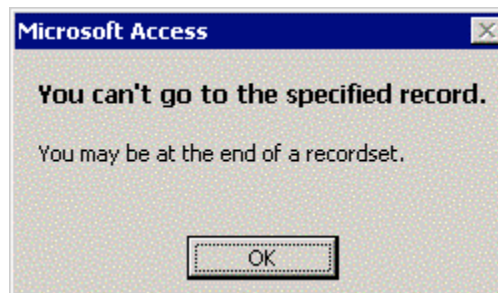
Exit—This will exit you from the work order system.



SPECIAL NOTES:

- ◆ With the ADD button, the work order is saved and the STATUS field stays OPEN. Can't use BACKWARD and FORWARD buttons.
- ◆ With the SAVE button, does save WO and leaves STATUS field blank. Can use BACKWARD and FORWARD buttons.

This means you have reached the end.
Click on **OK**



If you start to print a report and change your mind and click on **STOP**, this screen will appear. Just click on **OK**.

