

Work Order System

Usage

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Introduction



Work Order Module icon

This manual describes how to use the Work Order module. The work order system is tied to the following modules:

- General Inventory.
- Hose Inventory.
- SCBA Inventory.
- Apparatus Management.
- Firefighter Request. This is a request by personnel and it is assigned to that person's ID.
- Station Inventory. (A fire station is also a piece of inventory).
- Hydrant Management.
- Miscellaneous. This is a work order that is not assigned to any particular object.

Work orders can be created, viewed and edited from the main Work Orders window or anywhere in the system that an inventoried item can be found. The Work Order module is accessed from the Auxiliary main menu choice. You can also setup a speed button for the work order entry.

Viewing/Editing/Creating Work Orders

There are three ways of enter a work orders. Each method is detailed below.

1. From the Work Order menu.
 - a. Click the Work Order icon.
 - b. Select the work order you would like to modify and press **Edit**, or select **New** to create a work order.

2. From an Inventory Item screen.
 - a. Select the inventory item.
 - b. Select the Work Order tab.
 - c. Select **Edit** to modify a work order or **New** to add a work order.

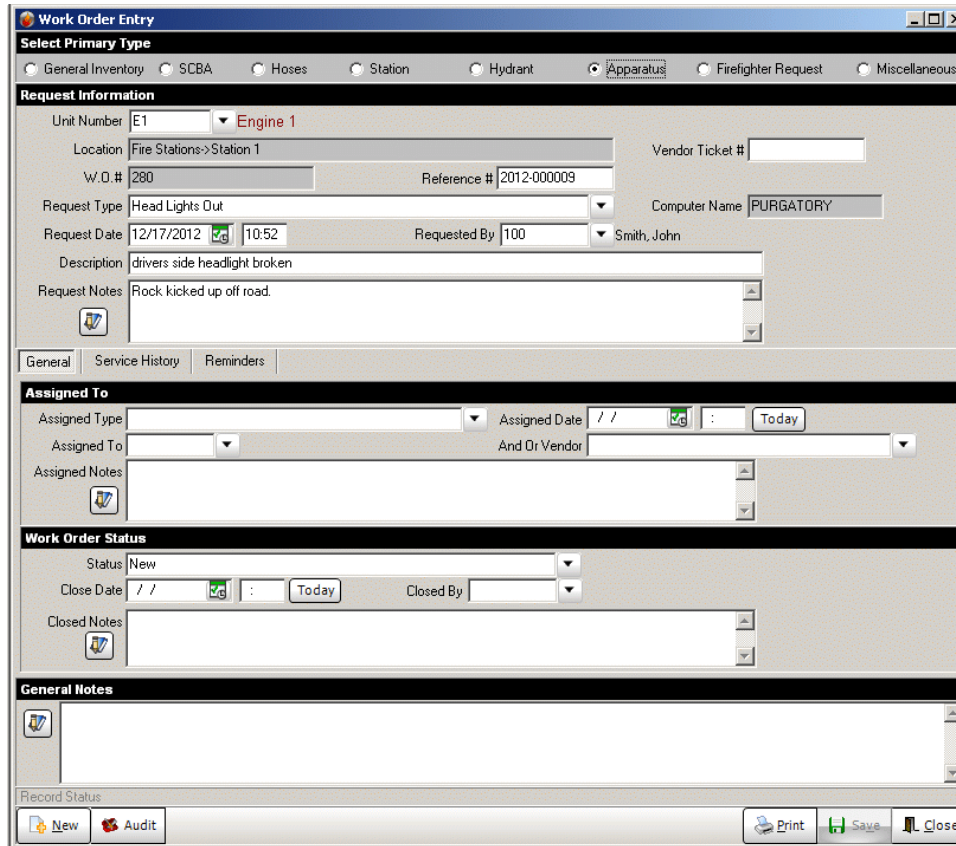
3. From a speed button. The following icon displays the work order speed button found in the tool bar.



- a. Click on the speed button.
- b. Enter the work order.

Work Order Entry Screen

The Work Order Entry Screen is broken up into several sections.



Entry Screen Section	Description
Select Primary Type	This section lists out all of the modules that a work order can be assigned to.
Request Information	This is the request information. Fill this section out when adding a new work order.
Assigned To	Fill this section out when assigning the work order to a vendor or member.
Work Order Status	This is for tracking the work order status.
General Notes	This narrative can be any length.
Service History	This lists the service history assigned to the work order.
Reminders	This lists reminders assigned to the work order.

Information on the Main Screen

Open the work order entry screen to enter information about the work order. The following fields are entered in this screen:

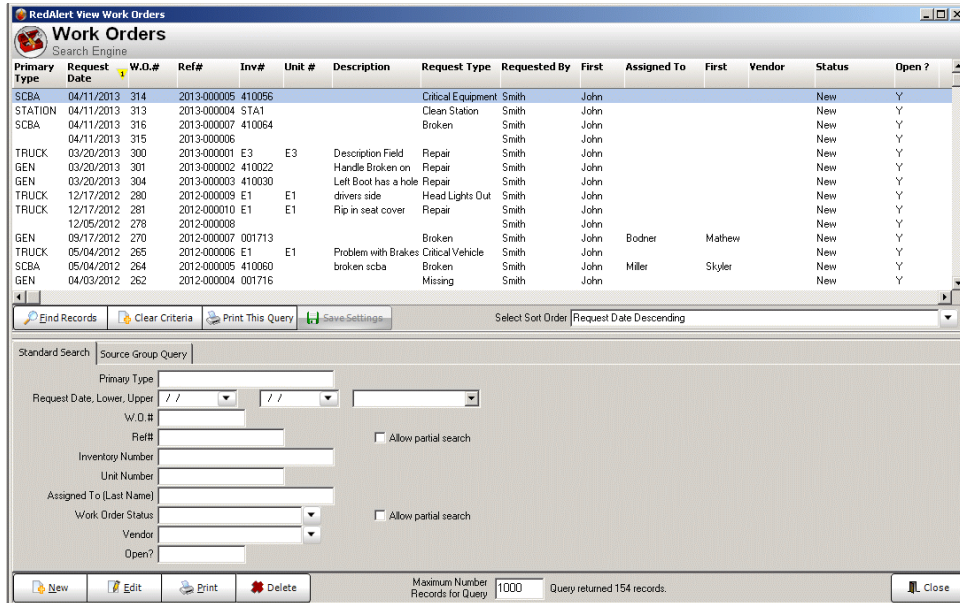
Field Description	How it is Used	Special Notes	Example Entries
Primary Type	Enter the Work Order Request Type.	Select the radio button. If accessed from an Inventory Item, Request Type will be automatically entered.	General Inventory, SCBA inventory, Hoses
Inventory Number or Hydrant Number, or Personnel ID	Select the appropriate item type.	Choose from the pick list. The pick list will depend on the type of work order.	410021
Request Type	Enter the Type of service requested.	Use the pick list. Choices are entered in the Work Order Setup menu.	Broken
Your Number	Enter the number you want to use to track this request.	This is a user defined number.	2007000009
Request Date	Enter the date the request is being made.	Use the pick list.	02/01/2007
Requested by	Enter the member number who is making the request.	Use the pick list.	100
Additional	Enter the additional brief description for the request.	This is a short description of the problem.	The tail light is broken
Request notes	Enter the extended description of the request.	This is for describing the request in detail.	Right tail light lens is broken.
Assigned Type	Enter the assignment type for this work order.	Use the pick list. Choices are entered in the Work Order Setup menu.	Newly Assigned
Assigned Date	Enter the date this work order was assigned.	None	02/01/2007
Assigned To	Enter the member number who this work order is assigned to.	Use the pick list.	100
Assigned Notes	Enter the additional information for this assignment.	Extra information being provided by the member completing the assignment should go here.	Check back room for spare part before ordering a new one
Status	Enter the status of the work order.	Use the pick list. Choices are entered in the Work Order Setup menu.	Hold For Part
Closed Date	Enter the close date in the space provided.	None	02/01/2007
Closed By	Enter the member number who closed this work order.	Use the pick list.	100
Closed notes	Enter the additional information in the space provided.	None	
Notes	Enter any additional information about this work order in the space provided.	None	

Printing an Individual Work Order

Follow these steps to print a work order:

1. Open the desired work order. Press the Print Button on the bottom of the entry screen.
2. Place a check in the Summary box, click the **Print** button. The work order will now print.
3. To view the report, without printing it, click the **Preview** button. The work order can be printed from the preview window by clicking the printer icon.

Finding Work Orders



Press the Work Order button found in the Auxiliary Menu Bar. Use the work order browse system to list work order according to following criteria:

Criteria	Description	Comments
Primary Type	Enter the primary type to view.	Examples are GEN, TRUCK, STATION, PERS, SCBA, HOSE, and HYD.
Request Date	Date requested.	Enter the lower and upper range in the space provided.
Unit Number	Unit number for TRUCK work orders.	Enter the unit number in the space provided.
Inventory Number	Inventory number for all related inventory work orders, TRUCK, STATION, PERS, SCBA, and HOSE.	Enter the inventory number in the space provided.
Assign To (Last Name)	Last name the work order is assigned to.	Enter the last name, or at least the first few letters.
Work Order Status	Status of Work Orders	Enter the status in the space provided. Use the pick list.

After you have entered the criteria, press the find records button.

Printing Work Orders

Select the report button and then click on the inventory box. Select the work order reports.

Work Order History Report Code: WORKORDHISTREP
Print work order summary.

Item Type

Primary Type ▼
Inventory or Apparatus ▼

Request Parameters

Request Type ▼
Request Date Range // //
Lower Date Range Upper Date Range
Requested by ▼

Assigned To Parameters

Assigned Type ▼
Assigned Date // //
Lower Date Range Upper Date Range
Assigned to Personnel ▼
Assigned to Vendor ▼

Work Order Status Parameters

Status ▼ All or Selected Status
Close Date // // All Open Work Orders
Lower Date Range Upper Date Range All Closed Work Orders
Closed By ▼

The Primary Type field drives what will come up in the next drop down field. Enter the appropriate criteria and then press print or preview.