



PROTEUS MMX TRAINING MANUAL –  
RIGHTS & ROLES

EAGLE TECHNOLOGY, INC.



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# WORK ORDERS

## 1. OVERVIEW

The **Work Orders** page in the **Work Orders Functional Area** is used to plan, create, and record maintenance and procedures in response to maintenance service requests, emergency breakdowns, or other non-routine maintenance activities. Each work order contains a variety of information, such as who requested the job, the estimated downtime of the equipment, the reason or problem, and the date by which the job should be completed.

**Note:** In addition to work orders created here, all activated work order masters will also show up in the **Active Work Order Record Navigator**. These work order masters can either be force-activated or activated by means of a schedule. Work order records can be filtered based on demand maintenance or preventative maintenance on the work order list display.

The fields listed in the Record Navigator are:

- Work Order Number
- Tasks Progress
- Job Number
- Description
- Type
- Priority
- Work Type
- Shift
- Cost Center
- Maintenance Code
- Asset Number
- Serial Number
- Assigned To
- Completion Date
- Requester

Work Order Number	Job Number	Description	Assigned to	Work Order Type	Priority	Work Type Name	Shift Name	Requested Date	Cost Center Name	Maintenance Code	Asset Section Name
2017/120495	work order	Testing	Rafaela Rodriguez	PreventiveMaintenance	Normal	HS DAY 17/17	Evening to Night	12/19/2017	2001 Rafaela Rodriguez	Electrical/Misc DM	
2017/120494		This WFO Master is part of a Test of functionality. Scheduling. Please do not edit.		PreventiveMaintenance				12/19/2017			
2017/120493		Signature - Mined	California SS	PreventiveMaintenance				12/19/2017			
2017/120492		Signature - Mined	California SS	PreventiveMaintenance				12/19/2017			
2017/120491		Signature - Mined	California SS	PreventiveMaintenance				12/19/2017			
2017/120490	work order	Testing	Rafaela Rodriguez	PreventiveMaintenance	Normal	HS DAY 17/17	Evening to Night	12/19/2017	2001 Rafaela Rodriguez	Electrical/Misc DM	
2017/120489	custom SS	custom SS	Employee 1 - India	PreventiveMaintenance	High	a	Day Night OP	12/19/2017	cost center - misc	Electrical/Misc DM	
2017/120488	work order master only	work order master only	Rafaela Rodriguez	PreventiveMaintenance	High	HS DAY 17/17	Evening to Night	12/19/2017	2001 Rafaela Rodriguez	Electrical/Misc DM	
2017/120487	make inspection S	make inspection S	Rafaela Rodriguez	PreventiveMaintenance	High	HS DAY 17/17	Evening to Night	12/19/2017	2001 Rafaela Rodriguez	Electrical/Misc DM	
2017/120486	27/12 work	27/12 work	Rafaela Rodriguez	PreventiveMaintenance	High	HS DAY 17/17	Evening to Night	12/19/2017	2001 Rafaela Rodriguez	Electrical/Misc DM	
2017/120485	work order	work order		PreventiveMaintenance				12/19/2017	2001 Rafaela Rodriguez	Electrical/Misc DM	
2017/120484	work order master only	work order master only					Afternoon to Evening shift	12/19/2017	2001 Rafaela Rodriguez	Electrical/Misc DM	
2017/120483	work order master only	work order master only					Evening to night	12/19/2017	2001 Rafaela Rodriguez	Electrical/Misc DM	

## 2. WORK ORDER NUMBERING

Work order numbers in the **Active Work Orders** page are assigned automatically. Proteus MMX will number the work orders in a date-code fashion (YYYYMMDDNNN, with “N” being a sequential number starting with 001).

## 3. CUSTOM WORK ORDER NUMBERING

The user has the option to create a custom template for Active Work Order numbering. This can be done through **Settings**.

### TO CREATE A CUSTOM WORK ORDER NUMBERING TEMPLATE

1. Go to **Work Orders** from **Settings**.
2. Select the **Work Order Numbers** option.
3. Select the **Use Custom Work Order** checkbox.
4. Enter a **Minimum Range Value**.
5. Enter a **Maximum Range Value**.
6. Enter a **Prefix**.
7. Enter a **Suffix**.
8. If desired, select the **Leading Zeros** checkbox.

The **Minimum Range Value** is the first number in the work order. The work orders will be auto-incremented until they reach the **Maximum Range Value**.

The **Maximum Range Value** is the last possible work order number in the template.

The **Prefix** is a string that will form the first part of the work order number.

The **Suffix** is a string that will be added after the range.

If **Leading Zeros** is selected, Proteus MMX will show all leading zeros in the work order (001 vs. 1).

## 4. DETAILS

The **Details** tab consists of basic work order information fields. These fields are:

- Description
- Maintenance Code
- Work Type
- Shift
- Cost Center
- Priority

**Note 1:** A work order must have a **Target** and a **Required Date** to be created.

**Note 2:** Leaving information fields blank will decrease Proteus MMX's effectiveness in building complete maintenance history records. Make sure all available information has been gathered prior to recording.

The screenshot displays the 'Work Order' window with the 'Details' tab selected. The window title is 'Work Order' and the ID is '2017103494'. The 'Details' tab is highlighted in the top navigation bar. The form contains various fields for work order information, including:

- Work Order Number: 2017103494
- Description: This WO Master is part of a Test of Multiple Scheduling. Please do not edit.
- Why Analysis 4: [Blank]
- Required Date: 10/30/2017
- Requester: [Blank]
- Why Analysis 5: [Blank]
- Asset: [Blank]
- Completion Date: [Blank]
- Analysis performed by: [Blank]
- Who: [Blank]
- Why Analysis 1: [Blank]
- UserField 18: [Blank]
- UserField 19: [Blank]
- UserField 22: [Blank]
- Digital signatures: [Blank]
- Copy: [Blank]
- Priority: [Blank]
- Asset BOM: [Blank]
- Requester Full Name: [Blank]
- Operators involved: [Blank]
- Work Started Date: 10/30/2017
- Who: [Blank]
- Why Analysis 2: [Blank]
- Custom measures defined by: [Blank]
- UserField 17: [Blank]
- Requester Phone: [Blank]
- Project: [Blank]
- Maintenance Code: [Blank]
- Work Type: [Blank]
- Shift: [Blank]
- Assigned to employee: [Blank]
- Activated Date: 10/30/2017
- Where: [Blank]
- How: [Blank]
- Why Analysis 3: [Blank]
- Implementation validated by: [Blank]
- UserField 16: [Blank]
- UserField 21211: [Blank]
- UserField 24: [Blank]

A label 'Details Tab' is overlaid on the bottom right of the form area.

## 5. TARGET

The **Target Navigation Tree** is used to attach assets or a location to a Work Order. Depending on your nomenclature, Work Orders can also be created for a location by creating a Work Order from that specific location.

### ATTACHING AN ASSET TO A WORK ORDER

**To add an asset to an active work order:**

1. When creating a new work order, select an asset/location from the **Navigation Tree**.
2. Confirm your selection.

**Note:** Any attachments from the asset will be added to the work order attachments.

The screenshot displays the MMX37 Test site interface. On the left, the Navigation Tree lists various assets and locations. The 'April' asset is highlighted with a red box. On the right, a table lists Work Orders with columns for Work Order Number, Job Number, and Description. The table contains several rows of data, including work orders with custom descriptions. A 'Target' button is visible at the bottom of the table.

Work Order Number	Job Number	Description
20171103290	1904	
20171102399	1904	
20171102217	custom work order 02	custom work
20171102192	custom work order 02	custom work
20170829151	1904	
20170828565	1904	
20170828042	custom work order 02	custom work
20170827106	1904	
20170826110	1904	
20170825135	1904	
20170824111	1904	
20170823122	1904	
20170822091	1904	
Target	1904	

## 6. TASKS AND LABOR

The **Tasks and Labor** tab is used to attach tasks and labor to a Work Order. Tasks are defined in **Tasks and Labor**

The **Tasks and Labor** tab consists of a listing of all tasks/labor assigned to the current work order. The grid contains various task-related fields. These fields are:

- Sequence
- Task Number
- Description
- Estimated Hours
- Start Date
- Completion Date
- Employee Name
- Labor Craft Code
- Contractor Name
- Hours at Rate 1
- Hours at Rate 2
- Hours at Rate 3
- Hours at Rate 4
- Hours at Rate 5

---

### ATTACHING A TASK TO WORK ORDER

To add tasks to a work order:

1. Open the **Work Orders** page from the **Work Orders** Functional Area.
2. Under the **Tasks and Labor** tab, select **Add** and select a task from the pop-up.
3. Enter all necessary data.
4. Confirm your selection.

The screenshot shows a window titled "Work Order Labor Dialog" with a "Details" tab. The form contains the following fields:

Task	Employee	Contractor
Hours at Rate 1	Start Date	Work Order Start Date
Hours at Rate 2	Hours at Rate 3	Completion Date
Hours at Rate 4	Hours at Rate 5	Work Order Completion Date

A "Tasks Dialog" button is visible at the bottom center of the form.

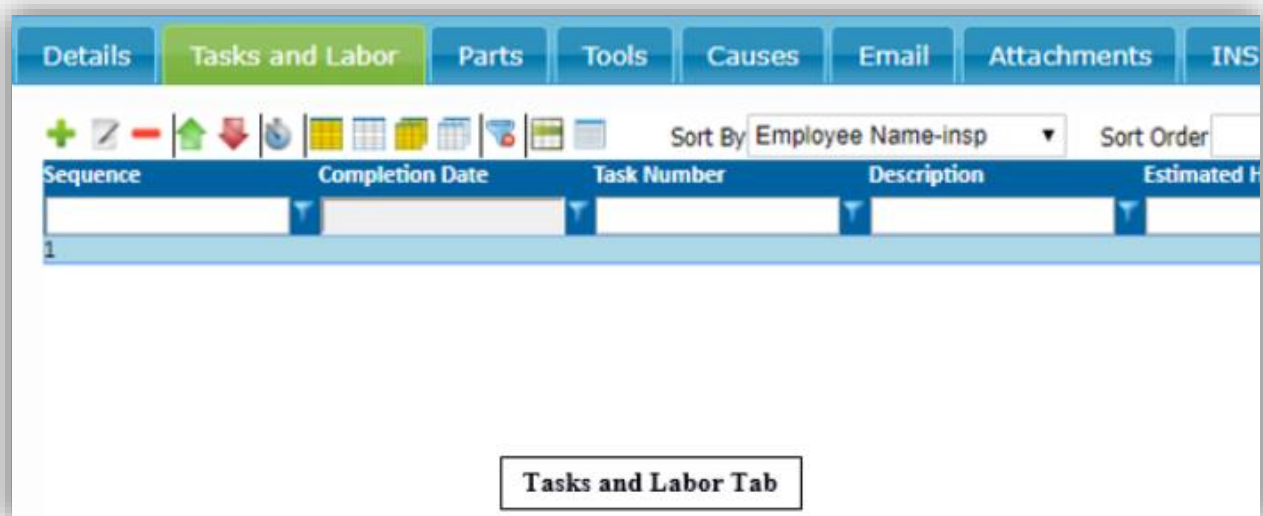


### To remove tasks from an active work order:

1. Open the **Work Orders** page from the **Work Orders** Functional Area.
  2. Select a work order.
  3. Under the **Tasks and Labor** tab, select a task from the grid.
  4. Select **Perform Earlier** or **Perform Later**, depending on your preference.
  5. Select **Save**
- 

### To reorder tasks in an active work order:

1. Open the **Work Orders** page from the **Work Orders** Functional Area.
2. Select a work order.
3. Under the **Tasks and Labor** tab, select a task from the grid.
4. Select **Perform Earlier** or **Perform Later**, depending on your preference.
5. Select **Save**.



## 7. PARTS

The **Parts** tab is used to attach a part or parts to a work order. Each part is defined in the **Parts Master** page in the **Inventory** Functional Area.

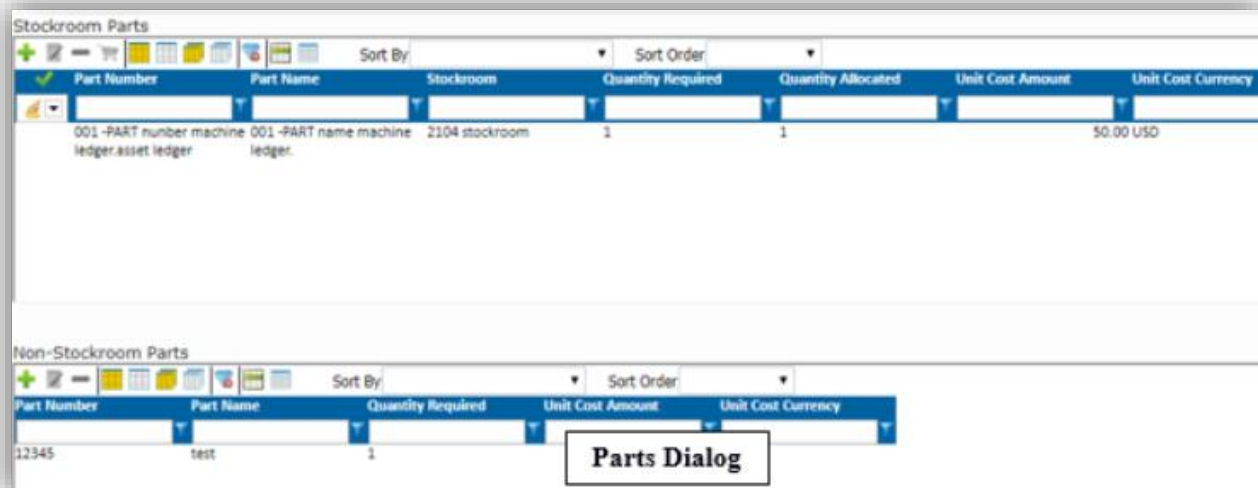
The **Parts** tab consists of a list of all parts from the **Parts Master** page. The grid contains various part-related fields. These fields are:

- Part Number
- Part Name
- Stockroom
- Quantity Required
- Quantity Allocated
- Unit Cost

### ATTACHING A PART TO A WORK ORDER

To add parts to an active work order:

1. Open the **Work Orders** page from the **Work Orders** Functional Area.
2. Under the **Parts** tab, select **Add** and select a part from the pop-up.
3. Confirm your selection.



To remove parts from an active work order:

1. Open the **Work Orders** page from the **Work Orders** Functional Area.
2. Under the **Parts** tab, select a part from the grid and select the **Remove** icon.
3. Select **Save**.

## 8. TOOLS

The **Tools** tab is used to attach a tool or tools to a work order. Each tool is defined in the **Tools** page in the **Inventory** Functional Area.

The **Tools Tab** consists a list of all tools from the **Tools Page**. The grid contains various tool-related fields. These fields are:

- Tool Number
- Tool Name
- Tool Crib

---

### ATTACHING A TOOL TO A WORK ORDER

**To add tools to a work order:**

1. Open **Work Order** from the **Work Orders** Functional Area.
  2. Under the **Tools** tab, select **Add** and select a tool from the pop-up.
  3. Confirm your selection.
- 

**To remove tools from an active work order:**

1. Open **Work Orders** from the **Work Orders** Functional Area.
2. Under the **Tools** tab, select a tool from the grid and select the **Remove** icon.

The screenshot shows a software interface with a tabbed menu at the top: Details, Tasks and Labor, Parts, Tools (selected), Causes, Email, Attachments, and INSP/Cal. Below the menu is a toolbar with icons for adding, deleting, and sorting. To the right of the toolbar are two dropdown menus labeled 'Sort By' and 'Sort Order'. Below these is a table with three columns: Tool Number, Tool Name, and Tool Crib. The first row of data shows '88' in the Tool Number column, 'eighty eight' in the Tool Name column, and 'tool crib' in the Tool Crib column. At the bottom center of the interface is a button labeled 'Tools Tab'.

Tool Number	Tool Name	Tool Crib
88	eighty eight	tool crib

## 9. CAUSES

The **Causes** tab consists of a grid that displays the root cause of the work order. These can be used to determine trends. The grid contains various cause-related fields. These fields are:

- Cause Number
- Description

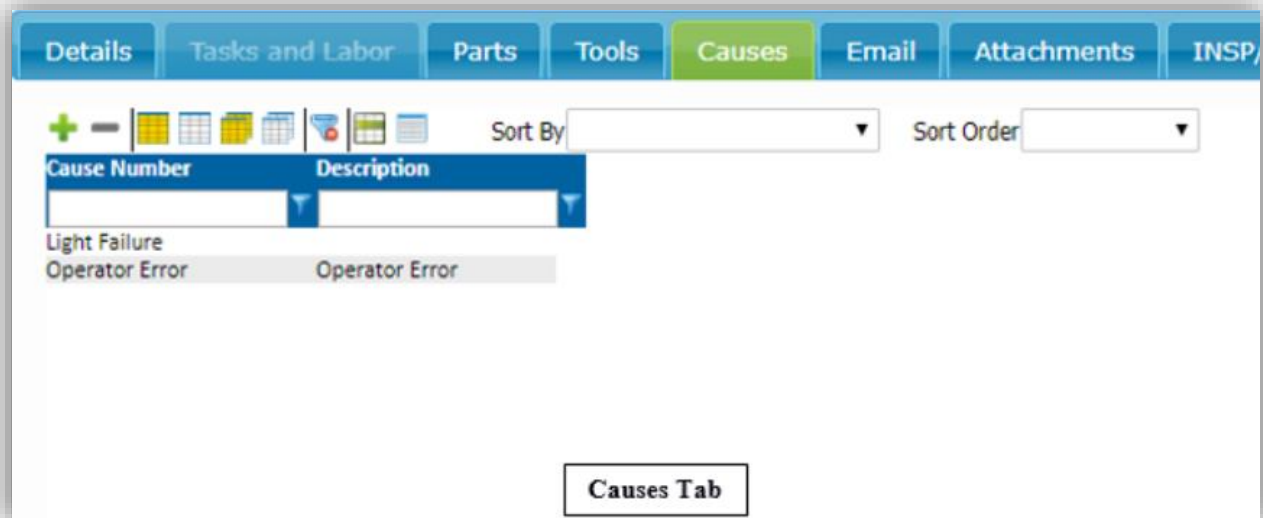
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### ATTACHING A CAUSE TO A WORK ORDER

To add causes to a work order:

1. Open **Work Orders** from the **Work Orders** Functional Area.
2. Under the **Causes** tab, select **Add** and select a cause from the pop-up.
3. Confirm your selection.

**Note:** The list of Causes comes from the **Settings** Menu under **Work Orders > Causes**. You can add or edit causes there.



## 10. CREATING A WORK ORDER

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### TO CREATE A WORK ORDER

1. Open **Work Orders** from the **Work Orders** Functional Area.
2. Select the **New** icon.
3. Enter in all data on the **Details** tab.
4. All remaining tabs/information can be entered at this point.
5. Select **Save**.

**Note:** **Targets** can be an Asset, Customer Asset, Location or Customer Location.

## 11. CLOSING AN ACTIVE WORK ORDER

When a work order is closed, all data for that work order is transferred from the **Work Orders** page to the **Closed Work Orders** page. In addition, all dates, costs, and inventory levels are updated per the values entered on the complete work order.

---

### WHEN A WORK ORDER IS CLOSED, THE FOLLOWING OCCURS:

- The work order is transferred from the **Work Orders** page to the **Closed Work Orders** page. The **Closed Work Orders** page shows all closed work orders since the last time its database was purged.
- For each part used in the work order, a new quantity on hand is calculated and written to the **Stockrooms** page. Also, the **Date Last Used** field is updated.
- The actual material and labor costs are calculated and written to the **Assets Cost History**.
- Material Cost = Qty. Allocated \* Unit Cost
- Labor Cost = Labor Rate for Appropriate Labor Craft \* Hours at Rate
- All dates are updated in the **Closed Work Orders** page.

---

### TO CLOSE AN ACTIVE WORK ORDER

1. Open the **Work Orders** page from the **Work Orders** Functional Area.
2. Select a record from the Record Navigator.
3. Edit the work order to enter all relevant information (Actual Downtime, Employee Labor Hours, Parts Used, etc.)
4. Select the **Complete and Close** icon.
5. Enter the **Completion Date** for the work order, if it wasn't already entered.
6. Add a digital signature, if required.
7. Select the **Save** icon.

**Note:** You can also **Batch Close**, or close multiple work orders using the same method by selecting more than **one (1)** record.

## 12. CANCELLING AN ACTIVE WORK ORDER

When an active work order is cancelled, the outcome will vary depending on the type of maintenance. When a **Demand Maintenance** work order is canceled, it is removed from the **Work Order** page and is gone forever. However, when a **Preventive Maintenance** work order is cancelled, the work order is removed and placed on the **Cancelled Work Orders** page. The work order is rescheduled to the next scheduled date. All parts, tasks, employees, etc. are no longer allocated or assigned to the work order.

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### TO CANCEL A WORK ORDER

1. Open the **Work Orders** page from the **Work Orders** Functional Area.
2. Select a record from the Record Navigator. [If a digital signature is required, then proceed to edit the work order and add a digital signature within that field and **Save**.]
3. Select the **Cancel** icon.
4. Confirm your selection.

---

### VIEW A CANCELLED WORK ORDER

Once cancelled, an active work order will be transferred to the **Cancelled Work Orders** module. Here, you can see the details of a cancelled work order by utilizing the **View** feature.

---

#### **To view a Canceled Work Order:**

1. Open **Cancelled Work Order** from the **Work Orders** Functional Area.
2. Select a cancelled work order record from the Record Navigator.
3. Select the **View** icon.

# WORK ORDER MASTERS

## 1. OVERVIEW

The **Work Order Masters** page in the **Work Order** Functional Area is used to create, delete, schedule or activate a work order master. The Work Order Master page is used to define maintenance jobs and procedures that are routinely completed. An example of this type of work order may be machine setup. It is a job which follows the same procedures every time but still falls under the category of demand maintenance because one cannot anticipate when the need will arise. Preventive maintenance schedules can also be entered for a work order master.

The **Work Order Masters** page is instrumental in the creation of Preventive and Demand maintenance work orders. When a work order master is activated by a user, it creates a demand maintenance work order that will be listed in the **Active Work Orders** page. When a work order master is used with a schedule, it becomes a preventive maintenance work order and will be listed in the Active Work Orders page.

**Note:** A work order number is automatically assigned when a work order master is activated or an active work order is created. The work order number will not be displayed in **Work Order Masters**. The work order number will be displayed in the **Active Work Orders** page.

The Record Navigator displays a listing of the work order masters. When a specific work order master is expanded, a details grid appears on the screen and lists the schedules associated with the work order master. The fields listed in the Record Navigator are:

- Job Number
- Description
- Priority
- Work Type
- Shift
- Cost Center Name
- Maintenance Code

The fields in the Details Grid are:

- Schedule Type
- Description
- Summary
- Next Occurrence Date
- Last Occurrence Date

## 2. DETAILS

The **Details** tab consists of basic work order information fields. These fields are:

- Job Number
- Description
- Cost Center
- Priority
- Shift
- Maintenance Code
- Project
- Work Type

**Note:** Job Number is a required field to create a record. All other fields are optional. Job Number can be categorized by work type, interval, asset type or by any other meaningful method of grouping. Examples include:

<b>AH100 – CLN</b>	Weekly cleaning of Air Handling Unit #100
<b>AH100 – INS</b>	Inspection of Air Handling Unit #100
<b>TEST01</b>	Compressor leak down test

**Note:** Leaving information fields blank will decrease Proteus MMX's effectiveness in building complete maintenance history records. Make sure all available information has been gathered prior to recording.



**Work Order Master Dialog** C9-Test-Labor:C-001

Details Tasks and Labor Parts Tools Email Attachments INSP/Cal

Job Number  
C9-Test-Labor:C-001

Description  
Job Number 13

Cost Center  
CC-01

Shift  
test

Work Type  
Emergency Work Order

Priority  
Maintenance Code  
Coordinator  
123

Requester Contact Information

Resolution

REFM # / REFERENCE #

UserField 7

UserField 5

UserField 3

UserField 6

Building And Location

UserField 8

UserField 9

Work Order Time of Day Completed

Dispatcher Name

Time

UserField 16

UserField 14

UserField 15

UserField 19

UserField 17

UserField 18

UserField 22

UserField 20

UserField 21211

Project

UserField 23

UserField 24

Add Tools

Print BOM

**Details Tab**

### 3. TARGETS

The **Targets** section located on the **Details** tab is used to attach assets or a location a work order master. **Work Order Masters** can also be created for a location by creating an asset that represents an area (i.e. create an asset record called *North Lawn*, *North Building*, or *North Entrance*).

The Targets section accesses a list of assets from the Assets page.

Targets (Total Count : 2)

☒ DTCRL1111-Clinical Reference Lab-Olathe Building PPPPP (Locations) MMX37 Test sil

☐ DTCRL1111-610100-AHU-P-1 (Assets) MMX37 Test site >> Clinical Reference Laborat

...

Remove

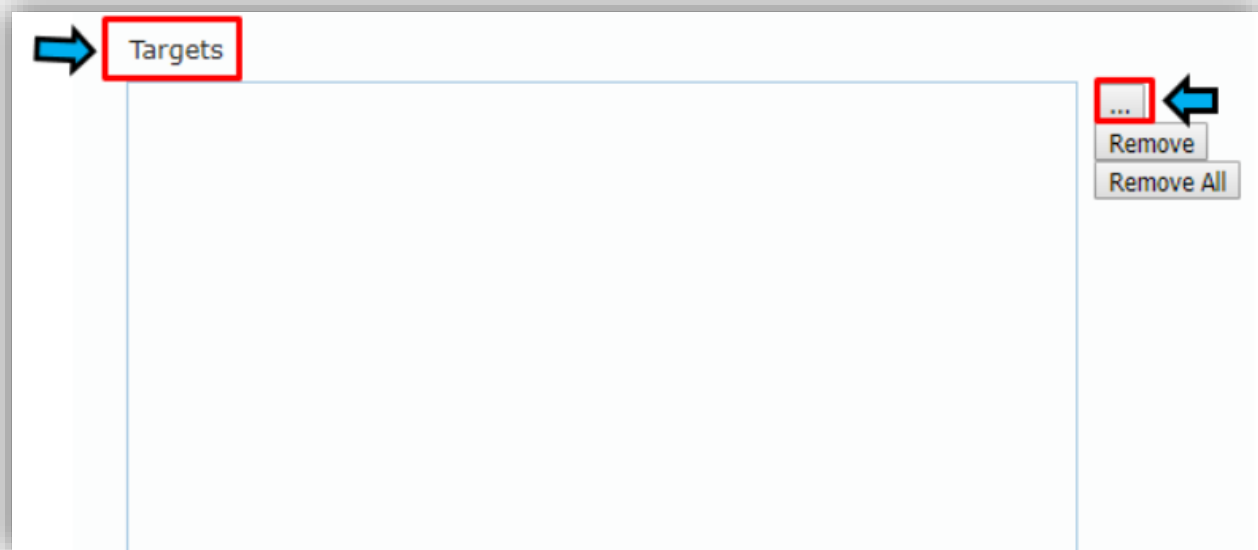
Remove All

**Targets Section**

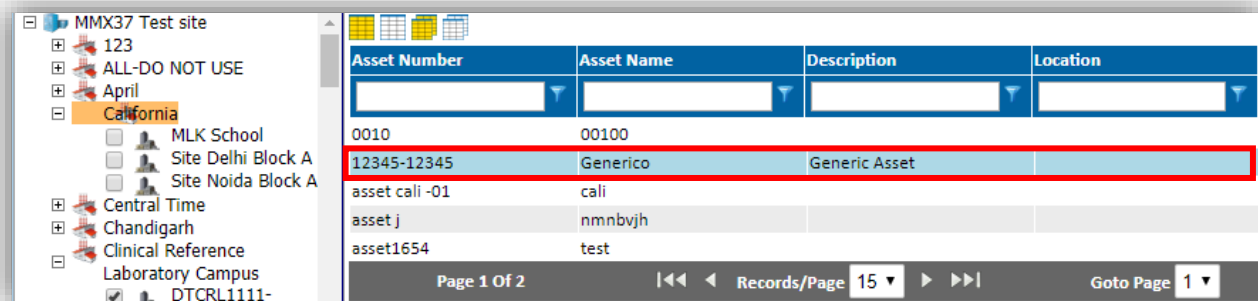
## ATTACHING A TARGET TO A WORK ORDER MASTER

To add a target to a work order masters:

1. Open **Work Order Masters** from the **Work Orders** Functional Area.
2. Under the **Details** tab, on the **Targets** section, select the **3-Dots** icon.



3. Select an asset from the list on the right.



**Note:** You can also use the navigation tree on the left to find an asset by location, or select a location as a target.

4. When you've selected an asset or location, select the **Add** icon at the bottom of the window.
5. Select **OK**.

**Note:** Asset warranty end date will display when associated with a work order.

**To remove targets from a work order master:**

1. On the **Targets** section, select the checkbox next to the **Asset** or **Location** that you wish to remove.
2. Select the **Remove** icon.
3. Select **OK**.

**7 Test site**

3

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ASTA-Residence

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1009-1009 Central

ossroads Academy

1015-1015 Central

1080 Quality Hill

ademy

10C-Ten Central

arking Garage

10W - 10th &

yandotte Garage

1308-1308

nnsylvania McGuff

1400-1400 Baltimore

14440-14440 E. 42nd

reet

1706 - 1706-1710

yandotte

1725-1725 Holmes

Asset Number	Asset Name	Description	Location
0010	00100		
00126666	001	Des	Location
00178	12		
002	002	002	
003	003		
04183	test	testing Description	

Page 1 Of 484

Records/Page 15

Goto Page 1

**Selected Target Summary**

Asset Number = 00126666 (001)

**Remove**

**Asset/Location Tree (Targets Tab)**

Asset Systems

Add Remove

OK Cancel

## 4. TASKS AND LABOR

The **Tasks and Labor** tab is used to attach tasks and labor to a work order master. Tasks are defined in **Tasks and Labor** is defined in **Labor Crafts/Employees**.

The **Tasks and Labor** tab consists of a listing of all tasks/labor assigned to current work order masters. The grid contains various task-related fields. These fields are:

- Sequence
- Name
- Employee Labor Craft
- Task Number
- Contractor
- Description
- Contractor Labor Craft
- Employee
- Estimated Hours

---

### ATTACHING TASKS AND LABOR TO A WORK ORDER MASTER

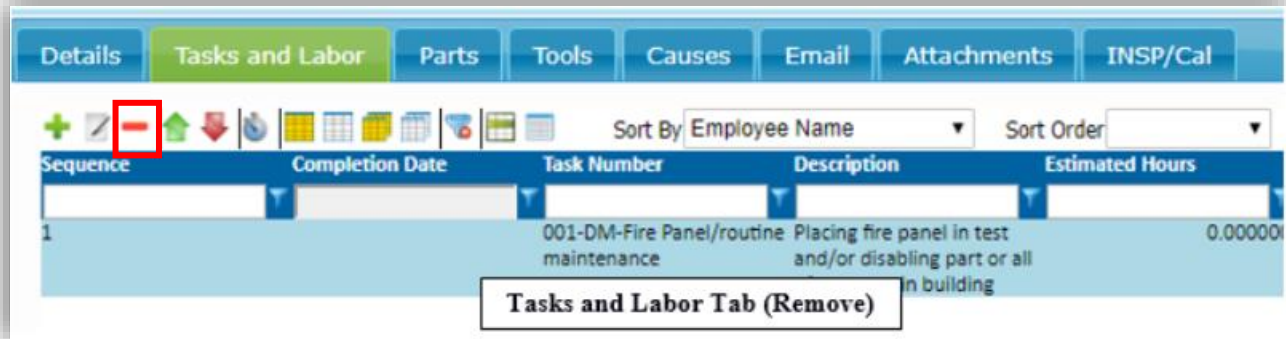
To add tasks, labor and/or contractors to a work order master:

1. Open **Work Order Masters** from the **Work Orders** Functional Area.
2. Under the **Tasks and Labor** tab, select **Add** and select a **Task, Employee** and/or **Contractor** from the pop-up.
3. Select **Save**.

The screenshot shows a software dialog box titled "Work Order Labor Dialog". It features a "Details" tab at the top. Below the tab, there are three columns of input fields. The first column contains "Task", "Hours at Rate 1", "Hours at Rate 2", "Hours at Rate 4", and "Hours at Rate 5". The second column contains "Employee", "Start Date", "Hours at Rate 3", "Hours at Rate 5", and "Hours at Rate 5". The third column contains "Contractor", "Work Order Start Date", "Completion Date", "Work Order Completion Date", and "Work Order Completion Date". Each field has a small icon to its right. At the bottom of the dialog, there is a button labeled "Tasks and Labor Dialog".

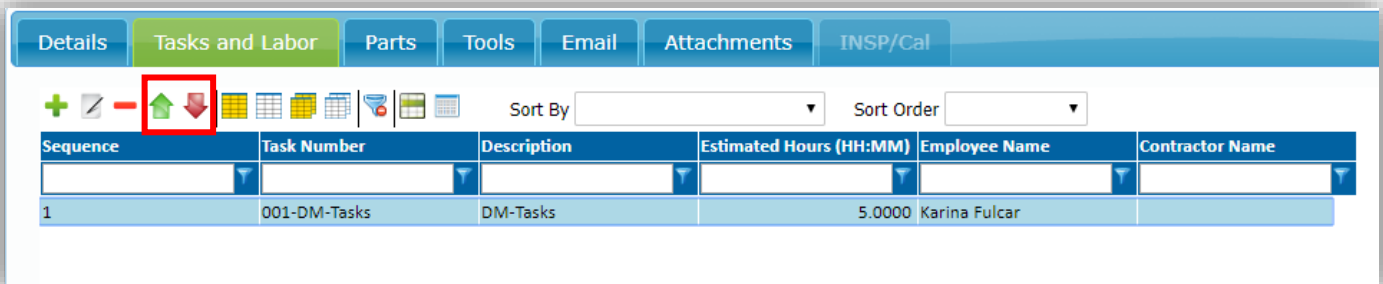
**To remove tasks from a work order master:**

1. Open **Work Order Masters** from the **Work Orders** Functional Area.
2. Under the **Tasks and Labor** tab, select a task from the grid and select the **Remove (Red Minus Sign)** icon.
3. Select **Save**.



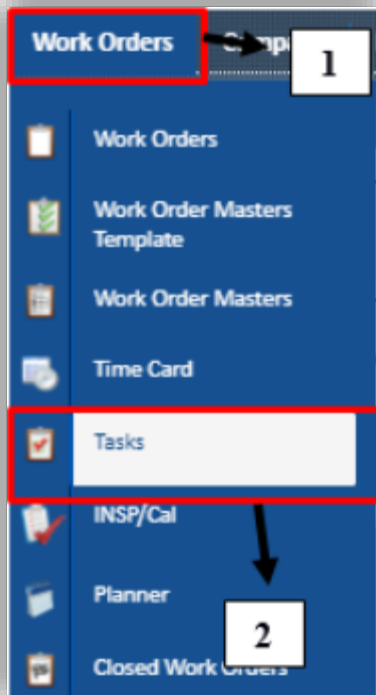
**To reorder tasks on a work order master:**

1. Open **Work Order Masters** from the **Work Orders** Functional Area.
2. Under the **Tasks and Labor** tab, select a task from the grid.
3. Select **Perform Earlier (Green Up-Arrow)** or **Perform Later (Red Down-Arrow)**, depending on your preference.
4. Select **Save**.



### To copy tasks:

1. Open **Work Orders** from the module drop-down from the main menu.
2. Select **Tasks**.



3. Select record to copy.

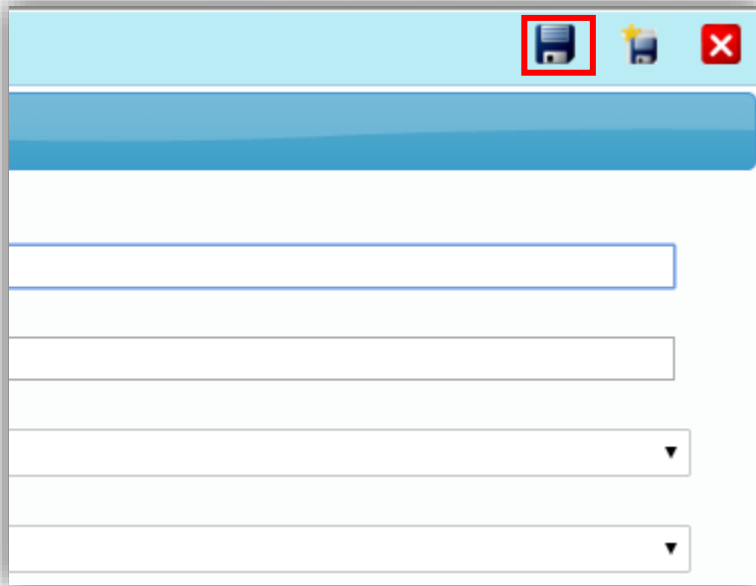
A screenshot of a table with columns: 'Номер задания', 'Код специальности', 'Расчетное время (в часах)', 'Описание', 'UserField 1', 'UserField 2', and 'UserField 3'. The first row is highlighted with a red box and labeled with a white box containing the number '3'. The first row contains: 'COMP-001', 'Technic Multiskilled craft-1', '2.00', '1. Inspect Filter 2. Replace Filter', and empty UserField cells. The second row contains: 'Pa0001', 'Technic Multiskilled craft-1', '2.10', 'Изготовить вал привода цепи ВРБ 13 линии', and empty UserField cells. The third row contains: 'Pa0002', 'Technic Multiskilled craft-2', '3.90', 'Изготовить ось вала согласно чертежу', and empty UserField cells. The fourth row contains: 'Pa0003', 'Technic Multiskilled craft-2', '4.50', 'Изготовить ось для захвата D=5мм L=8мм', and empty UserField cells.

Номер задания	Код специальности	Расчетное время (в часах)	Описание	UserField 1	UserField 2	UserField 3
COMP-001	Technic Multiskilled craft-1	2.00	1. Inspect Filter 2. Replace Filter			
Pa0001	Technic Multiskilled craft-1	2.10	Изготовить вал привода цепи ВРБ 13 линии			
Pa0002	Technic Multiskilled craft-2	3.90	Изготовить ось вала согласно чертежу			
Pa0003	Technic Multiskilled craft-2	4.50	Изготовить ось для захвата D=5мм L=8мм			

4. Click the **Copy** icon on the toolbar.



5. Click the **Save** icon.



A screenshot of a software window with a light blue title bar. In the top right corner of the title bar, there are three icons: a floppy disk icon (Save), a star icon, and a red square with a white 'X' (Close). The floppy disk icon is highlighted with a red rectangular box. Below the title bar, the window contains a blue header bar, followed by a white area with several horizontal input fields and dropdown menus.

## 5. PARTS

The **Parts** tab is used to attach a part of parts to a work order master. Each part is defined on the Parts page in the **Inventory** Functional Area.

The **Parts** tab consists of a list of all parts from the **Parts** page. The grid contains various part-related fields. These fields are:

- Part Number
- Part Name
- Stockroom Name
- Quantity Required

Work Order Master Dialog YRC-001-A-EN

Details Tasks and Labor **Parts** Tools Email Attachments Alarms INSP/Cal

Sort By: Sort Order:

Quantity Required	Part Number	Part Name	Serial Number	Stockroom

No Data To Display

Parts Tab

### ATTACHING A PART TO A WORK ORDER MASTER

To add parts to a work order master:

1. Open **Work Order Masters** from the **Work Orders** Functional Area.
2. Under the **Parts** tab, select **Add (Green Plus Sign)** and select a part from the pop-up.

Details Tasks and Labor **Parts** Tools Email Attachments Alarms INSP/Cal

Sort By: Sort Order:

Quantity Required	Part Number	Part Name	Serial Number	Stockroom

No Data To Display

Parts Tab (Add)



**To remove parts from a work order master:**

1. Open **Work Order Masters** from the **Work Orders** Functional Area.
2. Under the **Parts** tab, select a part from the grid and select the **Remove (Red Minus Sign)** icon.
3. Select **Save**.

The screenshot shows the 'Parts' tab of the 'Work Order Masters' interface. The top navigation bar includes tabs for 'Details', 'Tasks and Labor', 'Parts' (highlighted in green), 'Tools', 'Email', 'Attachments', 'Alarms', and 'INSP/Cal'. Below the navigation bar is a toolbar with various icons; a red minus sign icon is highlighted with a red square. To the right of the toolbar are 'Sort By' and 'Sort Order' dropdown menus. The main area contains a table with the following columns: 'Quantity Required', 'Part Number', 'Part Name', 'Serial Number', and 'Stockroom'. The first row of the table has the values: '1', '111', '1', and '2104 stockroom'. A 'Remove' button is located above the first cell of the first row. Below the table, there is a button labeled 'Parts Tab (Remove)'.

Quantity Required	Part Number	Part Name	Serial Number	Stockroom
1	111	1		2104 stockroom

Remove

Parts Tab (Remove)

## 6. TOOLS

The **Tools** tab is used to attach tool of tools to a work order master. Each tool is defined in the Tools page in the **Inventory** Functional Area.

The **Tools** tab consists of a list of all tools from the Tools page. The grid contains various tool-related fields. These fields are:

- Tool Number
- Tool Name
- Tool Crib Name

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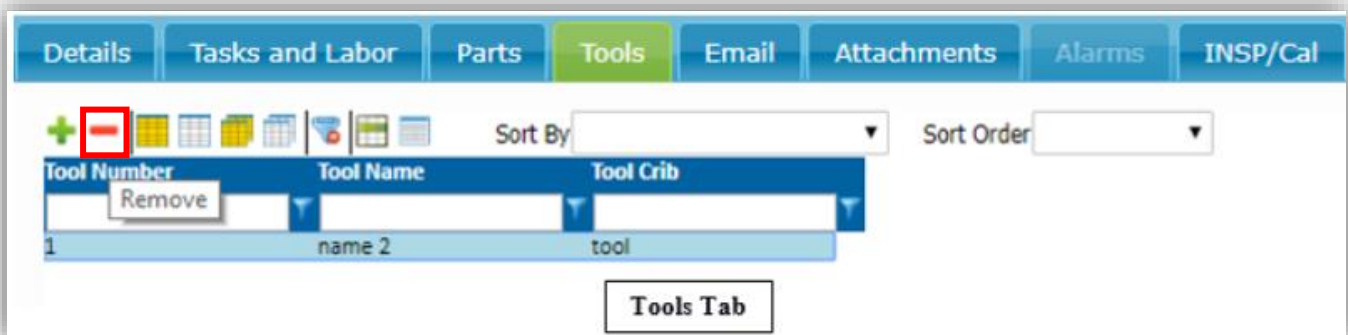
### ATTACHING A TOOL TO A WORK ORDER MASTER

To add tools to a work order master:

1. Open **Work Order Masters** from the **Work Orders** Functional Area.
2. Under the **Tools** tab, select **Add (Green Plus Sign)** and select a tool from the pop-up.
3. Select **Save**.

To remove tools from a work order master:

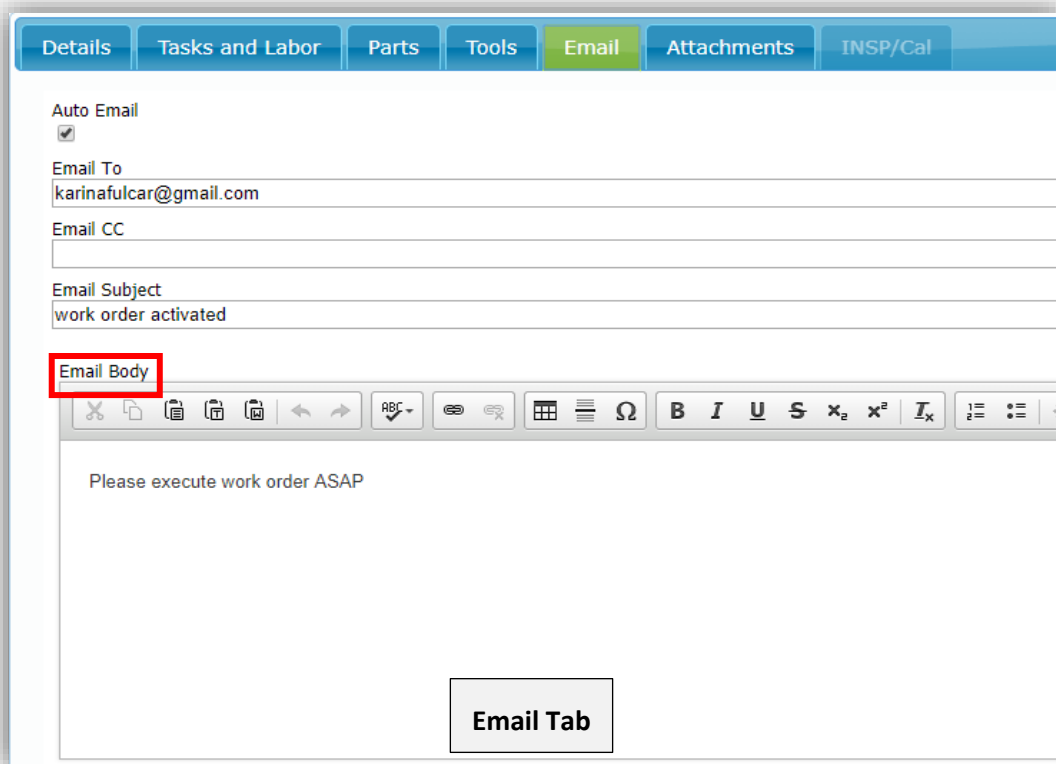
1. Open **Work Order Masters** from the **Work Orders** Functional Area.
2. Under the **Tools** tab, select a tool from the grid and select the **Remove (Red Minus Sign)** icon.
3. Select **Save**.



## 7. EMAIL

The **Email** tab consists of a form that contains all email-related activities for the work order master. If this is filled out, an email will be sent to the recipient upon activation of the work order master.

**Note:** This is **NOT** a required field.



The screenshot shows a software interface with a tabbed menu at the top. The tabs are: Details, Tasks and Labor, Parts, Tools, Email (highlighted in green), Attachments, and INSP/Cal. Below the tabs, the 'Email' tab is active, displaying a form with the following fields:

- Auto Email:** A checkbox that is checked.
- Email To:** A text field containing the email address 'karinafulcar@gmail.com'.
- Email CC:** An empty text field.
- Email Subject:** A text field containing the subject 'work order activated'.
- Email Body:** A text area containing the text 'Please execute work order ASAP'. This label is highlighted with a red box.

Below the 'Email Body' text area is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, strikethrough, text color, background color), alignment, and other functions. At the bottom right of the form, there is a button labeled 'Email Tab'.

## 8. CREATING A WORK ORDER MASTER

### TO CREATE A WORK ORDER MASTER

1. Open **Work Order Masters** from the **Work Orders** Functional Area.
2. Select the **New** icon.
3. Enter in all data on the **Details** tab.
4. Select **Save**.
5. All remaining tabs/information can be entered at this point.
6. After entering any additional information, **Save** your selection.

The screenshot shows the 'Work Order Master Dialog' window with the 'Details' tab selected. The form includes the following fields:

- Job Number
- Description
- Cost Center (dropdown)
- Shift (dropdown)
- Work Type (dropdown)
- Priority (dropdown)
- Maintenance Code (dropdown)
- Coordinator (dropdown)
- Requester Contact Information
- Resolution
- REFM # / REFERENCE #
- UserField 3
- UserField 7
- UserField 5
- UserField 6
- Building And Location
- UserField 8
- UserField 9
- Work Order Time of Day Completed
- Dispatcher Name
- Time
- UserField 16
- UserField 14
- UserField 15
- UserField 19
- UserField 17
- UserField 18
- UserField 22 (dropdown) - A callout box labeled 'Work Order Master (New)' points to this field.
- UserField 21211 (dropdown)
- Project
- UserField 24 (dropdown)
- Add Tools (checkbox)
- Print (checkbox)

**Note:** A job number and description are required. A target is not initially required, but must be added before work order activation is possible.

## 9. SCHEDULING A WORK ORDER MASTER

1. Locate the **Work Order Master** you just created from the record navigator and select it.
2. Select the **(+) sign** to the left of the record

Job Number	Description	Priority	Work Type	Shift Name
YRC-001-A-ENG-Chiller Maintenance (Semi Annual)	Chiller Maintenance (Semi Annual)		DAY ENGINEERS	

Next Occurrence Date	Last Occurrence Date	Description	Schedule Type	Summary	Manual Activation Date
07/03/2017	07/04/2016		Yearly	Every year(s) in Jul on First Mon	

3. Select the **New** icon.
4. Choose the **Cycle Type** for the work order (Daily, Weekly, Monthly, Yearly or Runtime)
5. Enter the **Schedule Initiation Date**. (This date basically “turns on” the work order)
6. Enter the frequency of the work order. (i.e. Every 3 days, Every 2 weeks, Every 1 year, etc.)
7. Choose on which day the work order should occur (for Weekly, Monthly, and Yearly Schedules)
8. Choose when the work order is due. (i.e. how many days it should take to complete)
9. Select the **Save** icon.

**Schedule Set-Up**

☒ Daily
 ☐ Weekly
 ☐ Monthly
 ☐ Yearly
 ☐ Runtime

Schedule Initiation Date: 
 Description:

Every   day(s)

☐ Schedule on completion & closed

Due:
   
☒ on same
   
☐ on next
   
☐ in

day(s)

**Schedule Set-Up**

**Note:** The Daily schedule has the option of **Schedule on Completion** so that the work order won’t generate again until the previous one is completed.

## 10. ACTIVATING A WORK ORDER MASTER

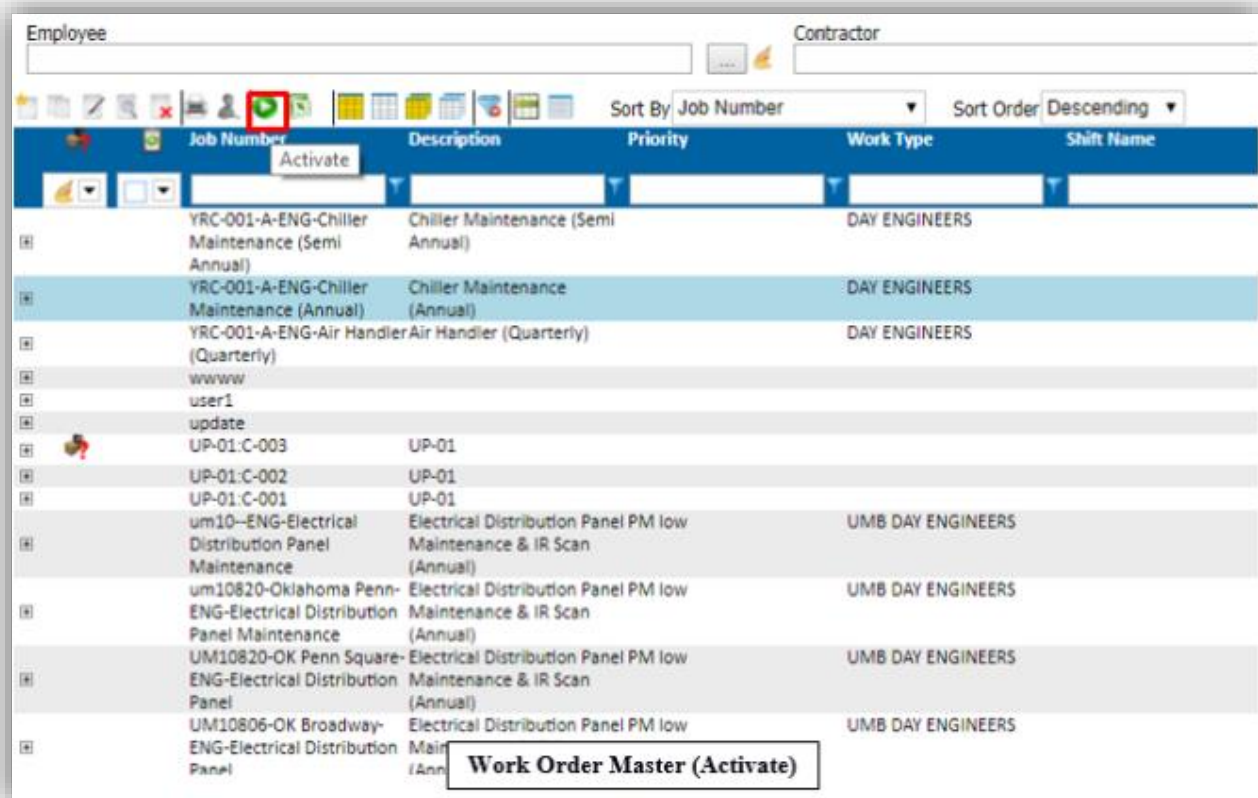
### TO ACTIVATE A WORK ORDER MASTER

1. Select a record from the Record Navigator.
2. Select the **Activate (Green Play)** icon.
3. After verification, the work order will now be assigned a work order number and be shown on the **Active Work Orders** page.

## 11. ACTIVATING MULTIPLE WORK ORDER MASTERS

### TO ACTIVATE MULTIPLE WORK ORDER MASTERS

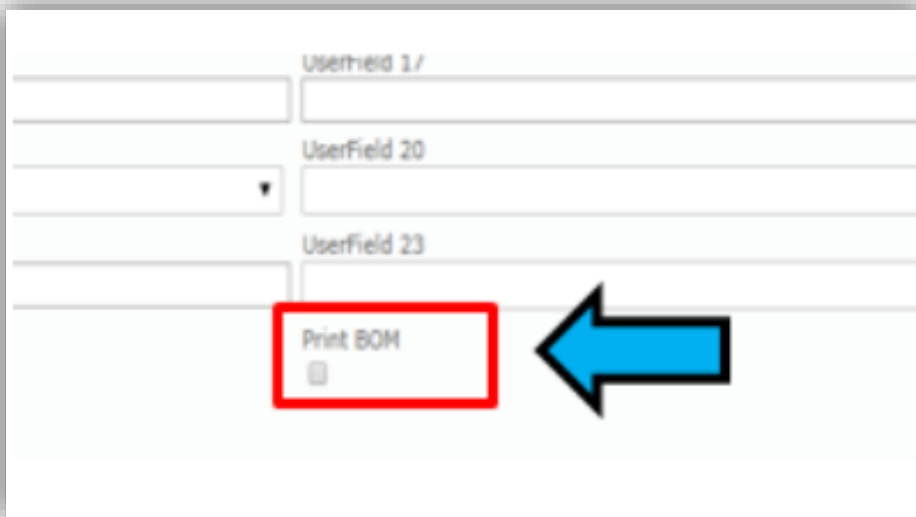
1. Select multiple records from the Record Navigator (by pressing and holding the **Ctrl** key).
2. Select the **Activate (Green Play)** icon.



## 12. PRINT BILL OF MATERIAL

### TO PRINT BILL OF MATERIAL

1. Go to the **Work Orders** module.
2. Click on **Work Order Masters**.
3. Select a work order master record.
4. Click the **Edit** icon.
5. Scroll to the bottom of the page to locate the **Print BOM** checkbox. (It is located above the **Notes** field.)



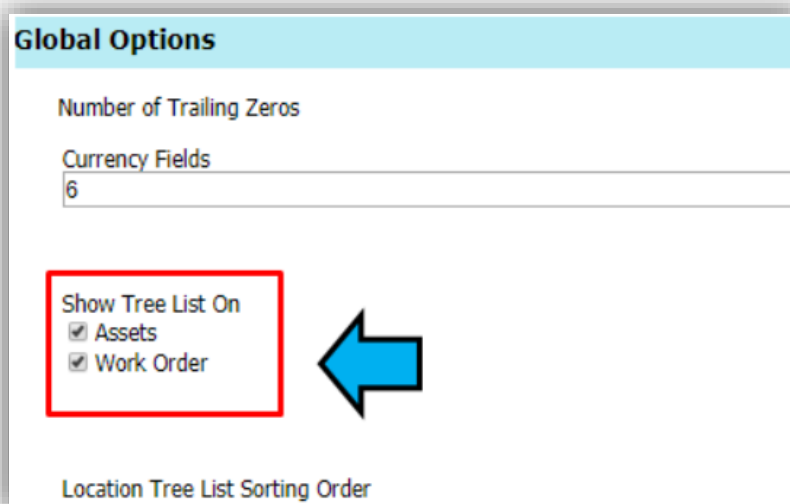
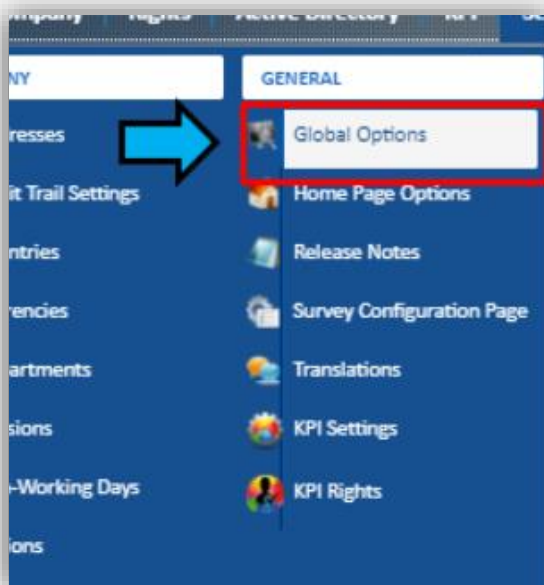
The screenshot displays a software interface with several input fields. The fields are labeled 'UserField 17', 'UserField 20', and 'UserField 23'. Below these fields, there is a checkbox labeled 'Print BOM'. A red rectangular box highlights the 'Print BOM' checkbox, and a large blue arrow points to it from the right. The interface is light gray with white input fields.

# WORK ORDER ADMINISTRATION

## 1. SHOW TREE LIST

### TO SHOW A TREE LIST FOR WORK ORDERS, YOU MUST:

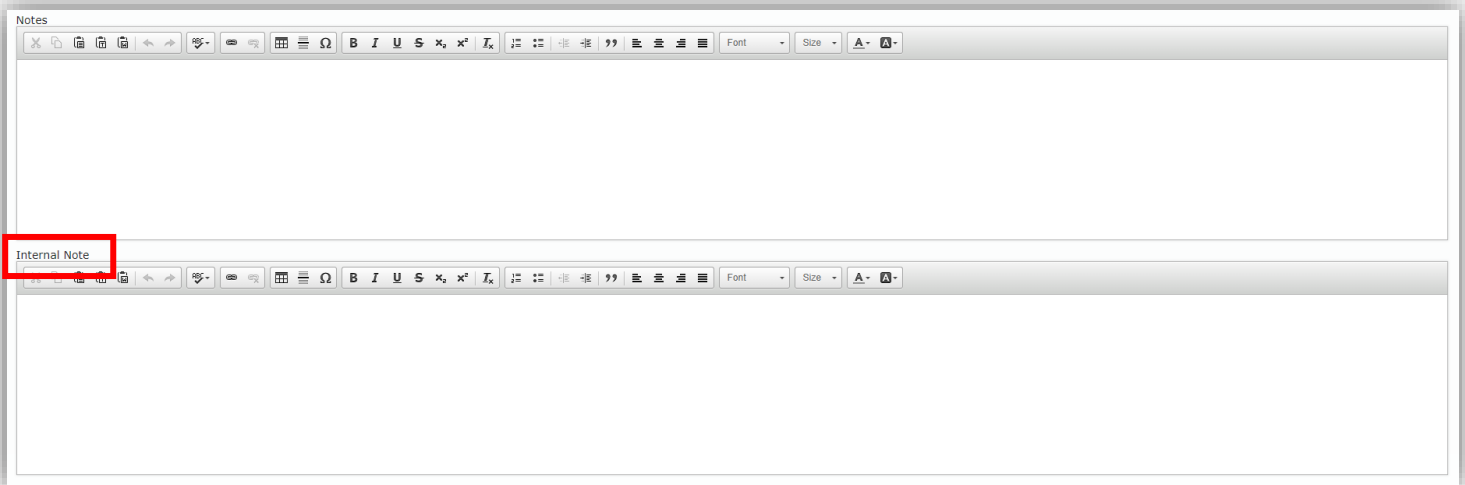
1. Go to the **Settings** Module drop-down.
2. Locate the **General** section of the drop-down menu.
3. Click **Global Options**.





## 2. INTERNAL NOTE FIELD

The Internal Note field in the **Work Order** detail page and **Close Work Order** detail page gives you the ability to record any details you feel are pertinent to the work order. This not can only be seen by other users (with proper permissions) in your company. This feature appears in the Work Orders module and the Closed Work Orders module.



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### TO UTILIZE WORK ORDERS INTERNAL NOTE FIELD

1. Go to the **Work Orders** module.
2. Select **Work Orders**.
3. Highlight a work order record.
4. Click the **View** or **Edit** icon.
5. Scroll down to the bottom of the **Details** page to find the **Internal Note** field.

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### TO ACCESS THE CLOSED WORK ORDER INTERNAL NOTE FIELD

1. Go to the **Closed Work Orders** module.
2. Click **Closed Work Orders**.
3. Select a closed work order record.
4. Click the **View** icon.
5. Scroll down to the bottom of the **Details** page to locate the **Internal Note** field.