Work Order Processing

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About This Guide

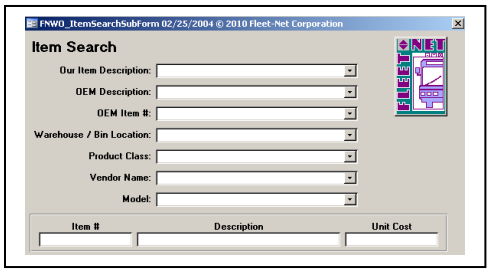
This guide contains standard procedures for operation and a description of each feature released with the module. The module description provides the intended application or use of the module and any comments that relate to this specific module.

Below are features that are used through FNW applications.

To correctly exit a form or exit out of Fleet-Net® completely click on the Fleet-Net® Icon always located in the upper right of every form.

**When the binoculars search function is not available, nor a drop-down list, select 'Ctrl F' as a search tool.

When using this button to search the following sample form will open up. Use any of the search item criteria to find your item select it and it will populate at the bottom of this form. To populate the previous form with the selected item, hover over the item # and double click it. Close the search form.



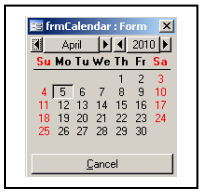
Throughout Fleet-Net® modules, there are Green Check marks that will appear next to specific fields. These Green Checkmarks when selected will open the Misc. List Codes form allowing the user to setup the necessary codes and their value for the associated field.

The clock button allows for changing the time entry.

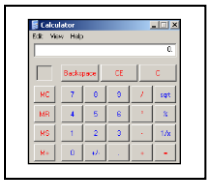
The question mark button opens the search option.

The Stop button aborts the current selection process.

The calendar button allows for quick selection of a specific date via a calendar. Calendar defaults to current date.



The calculator button allows for quick simple calculations on the fly. It opens up your systems calculator.



Work Order Processing

The Work Order Processing Module is a maintenance management tool used to track and record maintenance activities.

The Work Order module interfaces with Inventory, Vehicle Maintenance, Vehicle Problems, and General Ledger. Class Codes are used to define the inventory asset and expense accounts.

Using the Work Order Pending feature, work orders may be updated individually or in a batch update process.

Parts issued on a work order will first be committed and display in Committed on the inventory master. The Available field on the inventory master displays the adjustment to the total available items by reducing the total amount by the number of items committed. Once the Work Order is updated, the On Hand quantity will be updated, reducing the total by the number of committed items. Committed will now display zero, and the Available field will continue to display the reduced total.

Journal entries are updated to a general ledger subsidiary journal.

Inspections are automatically updated in the Vehicle Master in the Vehicle Maintenance module. Allows work orders to be generated for Components Inspections and Rebuilds. In addition, Campaign work orders can be generated for a range of Vehicle fleets or Components.

Each Work Order is printed with the work order number bar coded for quick scanning, using the bar code unit. Work Order Material and Labor may be tracked and updated via the bar code units, which, when updated, will automatically update on the work orders.

Notes may be entered by mechanics and/or supervisors. Objects (attachments) such as schematics or pictures may be attached.

Tool Inventory tracking, Tasks setup used in conjunction with Employee Assignments and Employee Assignment time clock are also available components of the Work Order module.

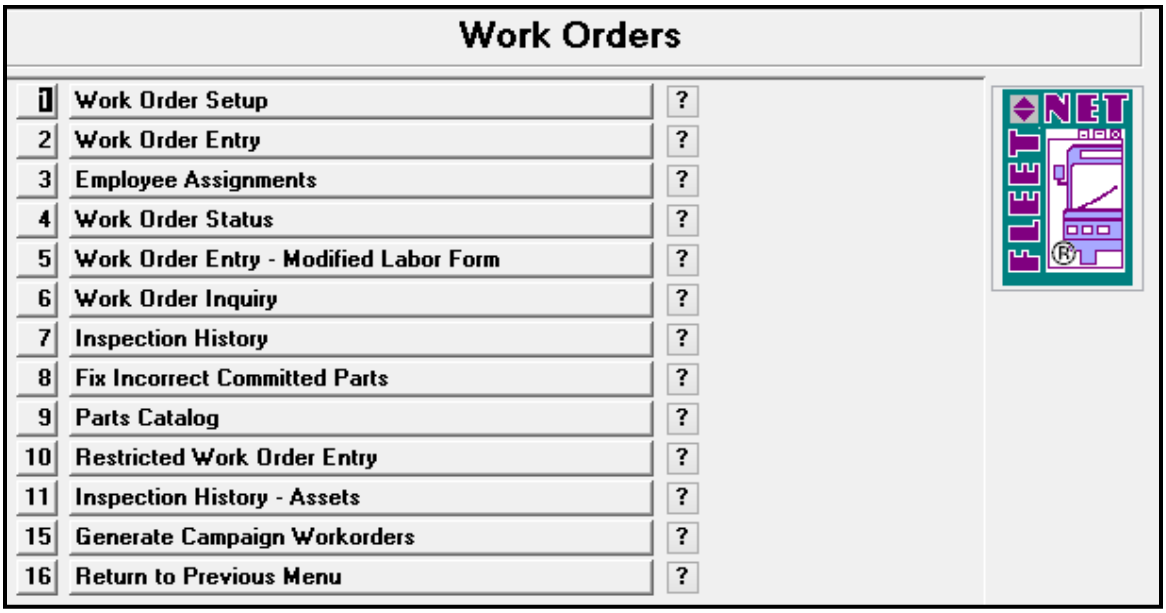
Historical data may be reviewed at any time.

Any Road Call or Safety Defects that are entered in Vehicle Problems will automatically generate a work order. Any Deferred Defects created in Vehicle Problems will be available for assignment to a generated work order. When the work order is closed and updated the assigned deferred defect will be marked as repaired.

Work Order Status Display

Display on a large monitor all open work orders and additional information from the Work Order Status Maintenance form. This requires a PC to be run unattended.

Work Orders



Work Order Daily Cycle

Menu	Program/Procedure
WO	Generate Inspection and/or Campaign work orders for Vehicles or Components
WO	Enter work order criteria via Work Order Entry or Restricted Work Order Entry Enter all Labor, Material, and Outside entries. Labor and Material can also be transmitted from the handheld units to the work order. Assign Deferred Defects that will be corrected on the Work Order
WO	Labor entries can also be generated by mechanics via Employee Assignments
WO	Using the Work Order Pending feature, update work orders daily. Work Orders may be updated individually or in a batch update process. Audit Reports should be reviewed for accuracy. The report can also be printed or saved to a file (i.e., .pdf) Any Work Orders with errors will not update and can be viewed and selected via the Pending button.

WO Setup Checklist

Fleet-Net's Work Order Processing module interfaces with G/L, Inventory, Vehicle Maintenance, and these modules must already be setup before using Work Order Processing.

Work Order Setup is required before a Work Order can be generated.

These Master Files must be setup prior to proceeding with Work Orders.

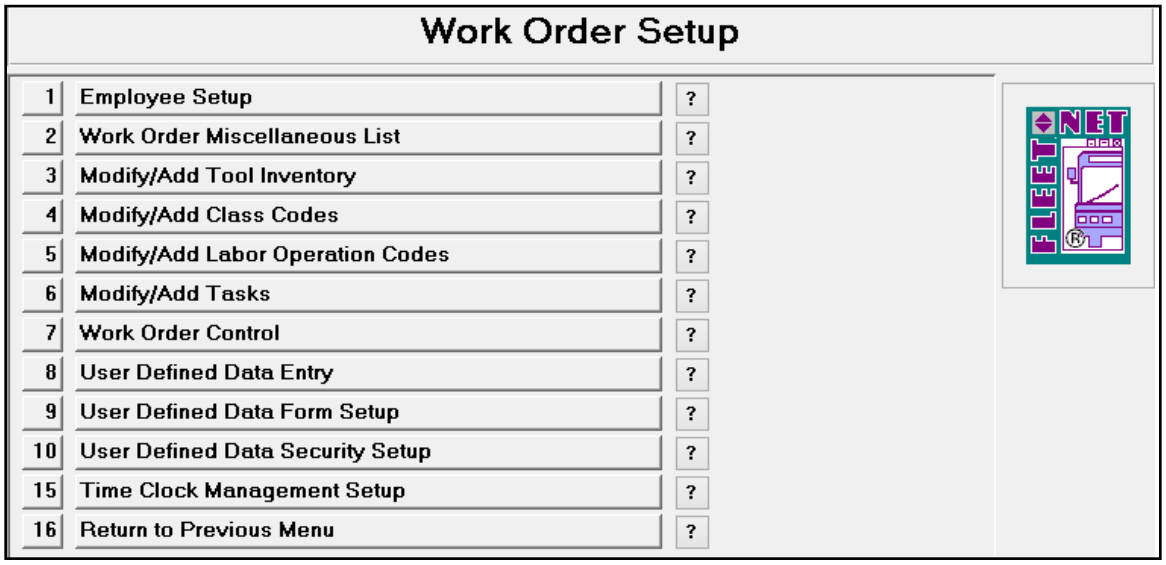
This checklist follows the instructions outlined on the following pages.

Done	Menu		Program/Procedure
_____	**WO01**	(a)	Setup all employees that will be opening or performing labor on Work Orders –Setup PIN #'s in Employee Maintenance (Security Menu). PIN #'s are required for entering Notes
_____	**WO01**	(b)	Setup Work Order Miscellaneous Codes used to define fields on Work Orders
_____	**WO01**	(c)	Modify/Add Tool Inventory – used to track tools
_____	**WO01**	(c)	Modify/Add Class Codes – These codes control the General Ledger distribution for Labor and Material entries as well as defining when inspection work orders roll over
_____	**WO01**	(d)	Modify/Add Labor Operations Codes – These codes Specifically describe a type of mechanical repair and are used to Measure the labor hours expended when performing specific tasks in Order to establish in-house labor standards. These standard labor Codes should be comparable to the labor standard categories Established by the manufacturers to give the transit property An idea of how their operation compares with outside industry Standards. Below are field description.
_____	**WO01**	(e)	Modify/Add Tasks- Define maintenance tasks by associating labor Operation codes, materials and tools used to perform the tasks. The tasks can then be assigned to each employee to define their Specific skill level set via Skills in Employee Setup
_____	**WO01**	(f)	Work Order Control- setup the next WO number to be generated for each combination of location and asset type
_____	**WO01**	(g)	User Defined Data Entry- Enter data for Tool Inventory in Fields defined in User Defined Form Setup
_____	**WO01**	(h)	User Defined Form Setup- Setup Forms and fields for additional Tool Inventory Tracking
_____	**WO01**	(I)	User Defined Data Security Setup – Assign user access to the User defined forms

Work Order Setup Procedures

Fleet-Net's Work Order Processing module interfaces with G/L, Inventory, Vehicle Maintenance, and these modules must already be setup before using Work Order Processing.

Work Order Setup is required before a Work Order can be generated.



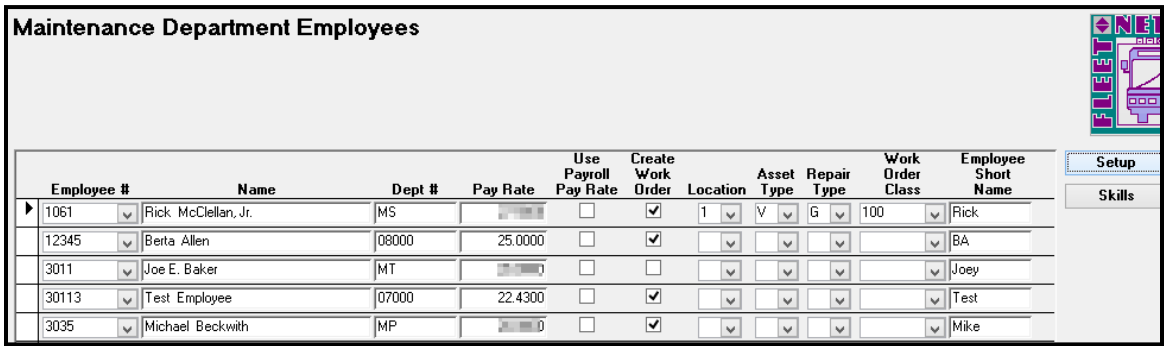
Employee Setup

Contact payroll or IT to setup new employee numbers and PIN #'s.

Only employees entered via this form can be assigned to Work Orders and other maintenance related programs. Therefore, setup only Maintenance personnel via this form. Click ***Setup*** to identify Maintenance Department Employees.

Setup

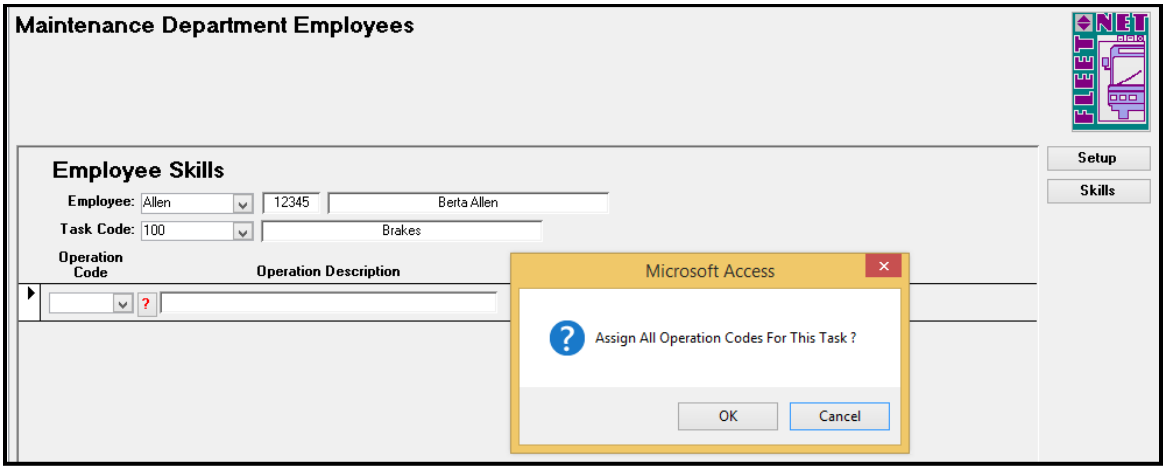
Managers and users accessing the WO Employee Assignment form and work orders in general must first be setup via the Employee Setup option located on the WO01 menu. This setup feature should be restricted via security to IT or Maintenance managerial personnel. Click ***Setup*** to access.



Field	Description
Employee #	Select the employee as set up via PR Employee Master Setup. If not using Fleet-Net payroll, setup is done via the System Menu Employee Maintenance
Name	The employee's name is automatically populated.
Dept #	The employee's department number is automatically populated.
Pay Rate	Enter an hourly pay rate to be used for work order labor calculation. If using the employees pay rate from payroll, enter 0.00 and select the checkbox.
Use Payroll for Pay Rate	Click the checkbox to use the employee's pay rate from the employees pay records via payroll.
Create Work Order	Click the checkbox if the employee is permitted to create a new WO via the Employee Assignments form. A check mark here causes the Create WO # button to appear for the users once they have entered their PIN.
Applies to Next 4 Fields	The following information applies to the next four fields: Location, Asset Type, Repair Type and Work Order Class Code. These are the default codes that will appear when a user creates a new work order within the Employee Assignments form. If the information is populated in this form, it can still be overwritten once the user is in Employee Assignments. Field can be left blank here, and the user will manually enter the code each time a new work order is created via Employee Assignments.
Location	The location selected here will become the default location (WO # prefix) when creating a new work order via Employee Assignments form.
Asset Type	The asset type selected here will become the default when creating a new WO via Employee Assignments. If the mechanic primarily works on buses, then select V for example, if it is a facilities employee, then you may want to select F.
Repair Type	The location selected here will become the default repair type when creating a new work order via Employee Assignments form. Examples of repair types are G-General Repair, I-Inspection etc.
Work Order Class	The location selected here will become the default Work Order class code when creating a new work order via Employee Assignments form. Examples of class codes can be viewed via the drop-down or accessed via Modify Class Codes on WO01 menu. This is important because it determines which GL account numbers will be charged for materials, labor and outside services.
Employee Short Name	Enter employee's initials or some other short unique identifier. This name will be visible via the Word Order Status display.

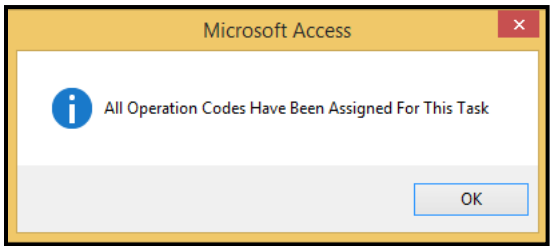
Skills

To assist in work order assignment, click ***Skills*** to enter the skills of each maintenance employee based on Tasks and/or Labor Operation Codes. This is optional but can be a useful tool.



Field	Description
Employee	Select the employee sorted by last name. Employee number and full name display.
Task Code	Select a task code as setup via Modify/Add Tasks. The task description will display. A message will display asking **'Assign All Operation Codes For This Task?'** Click ***OK*** to assign all operation codes for this task to this employee. Leave Task code blank to only assign Labor Operation codes
Operation Code	Select the operation codes from the drop-down list. A search button has been provided for ease of finding specific operation codes.

Once all operation codes have been assigned, upon selection of Task Code, the following message will display:



Work Order Miscellaneous List

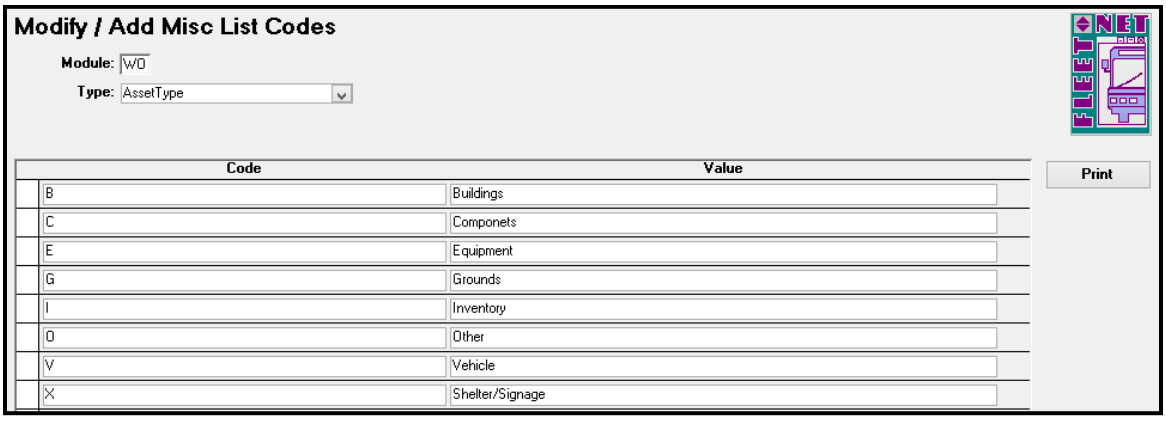
Click ***Miscellaneous Codes*** to define all codes used throughout the Work Order module.

Each Fleet-Net application includes a list of miscellaneous codes that are used within the system. Some of these codes are preset by Fleet-Net (Specific) while others are user defined.

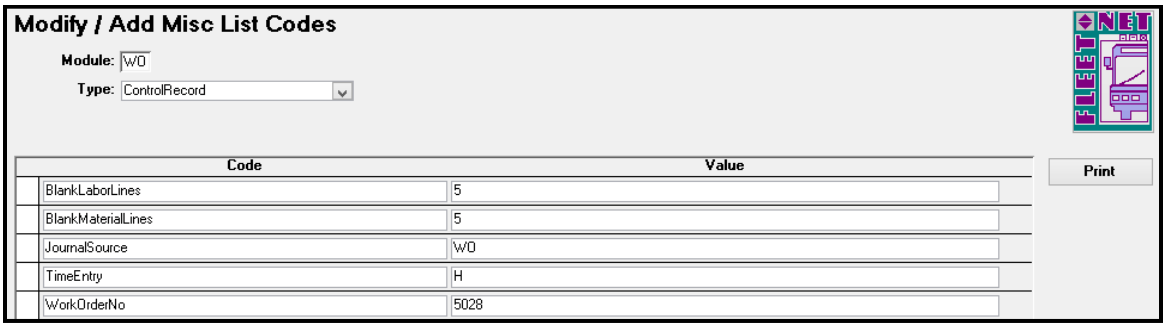
Field	Description
Type	Select from the drop-down options.
Code	Code used to identify the type of code
Value	Definition of code

The ***Print*** button will print a listing of all Miscellaneous Codes. The report will display the **TYPE**, **CODE** and **VALUE**.

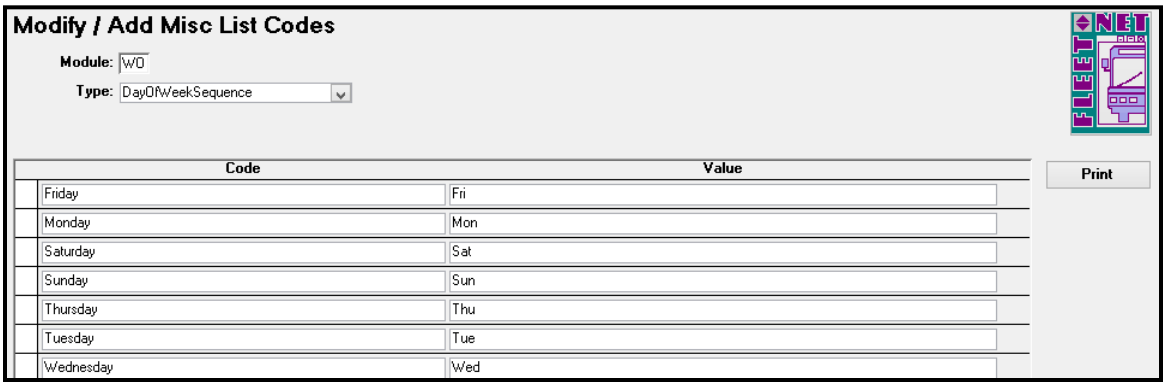
AssetType: (User Defined)



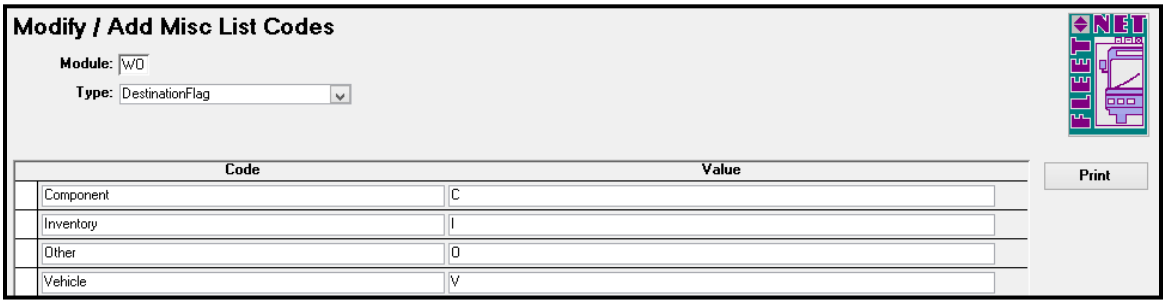
ControlRecord: (User Defined)



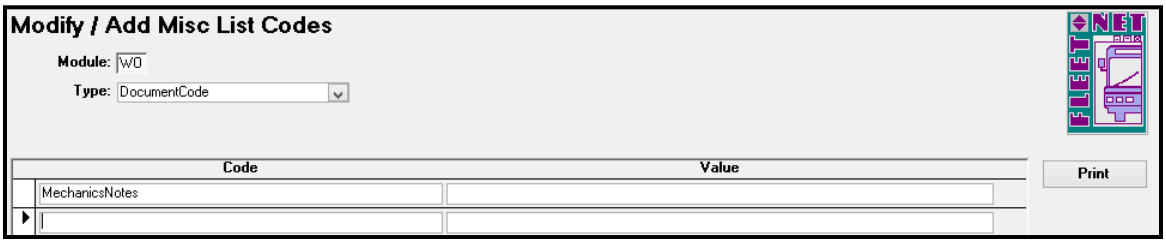
DayofWeekSequence: (User Defined)



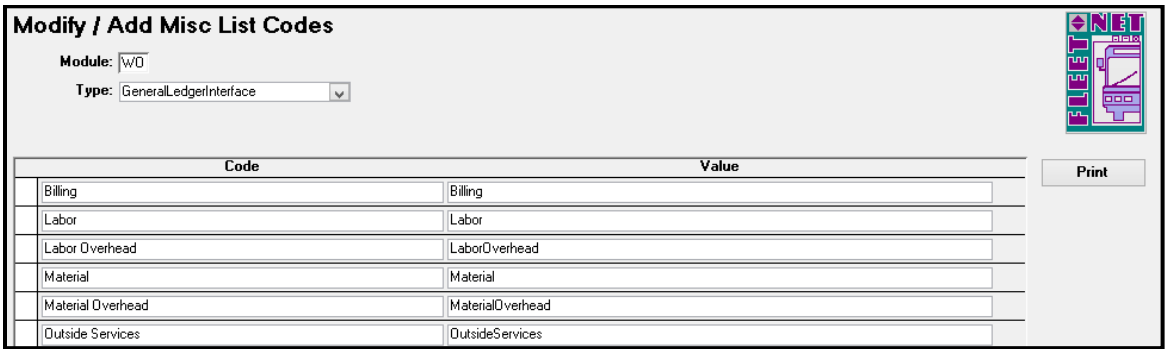
DestinationFlag: (User Defined)



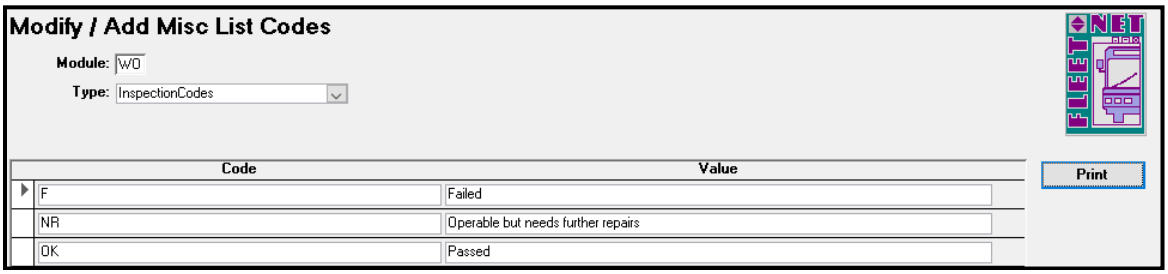
Document Code: (Specific)



GeneralLedgerInterface: (Specific)

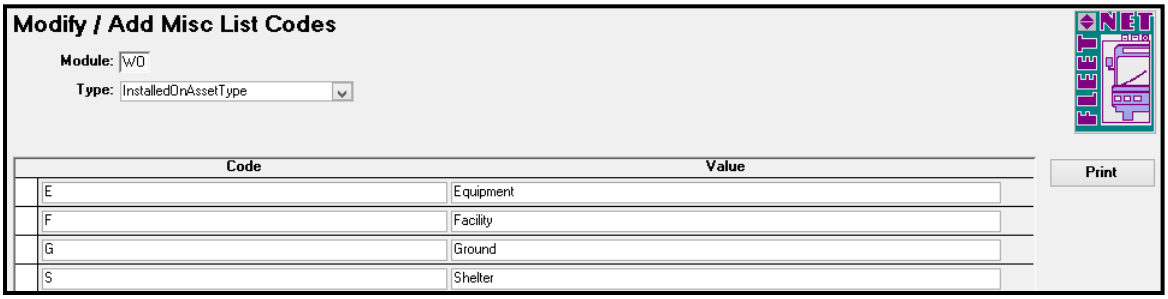


InspectionCode: (User Defined)



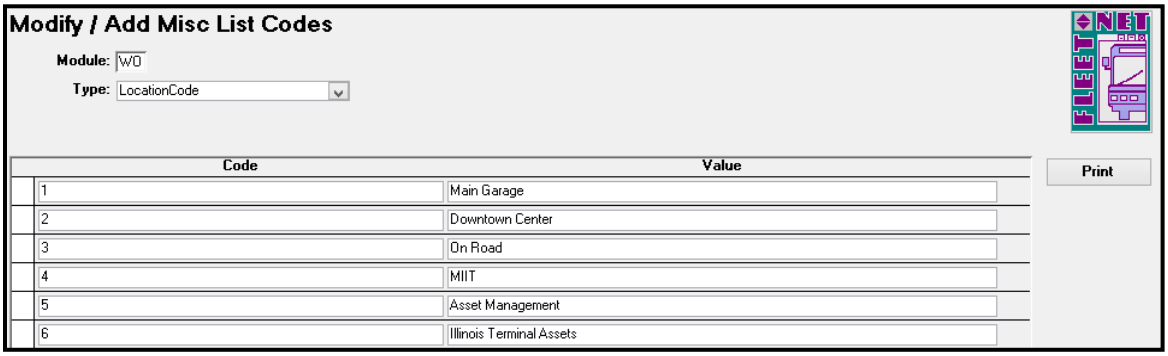
Code	Value
F	Failed
NR	Operable but needs further repairs
OK	Passed

InstalledOnAssetType: (Specific)



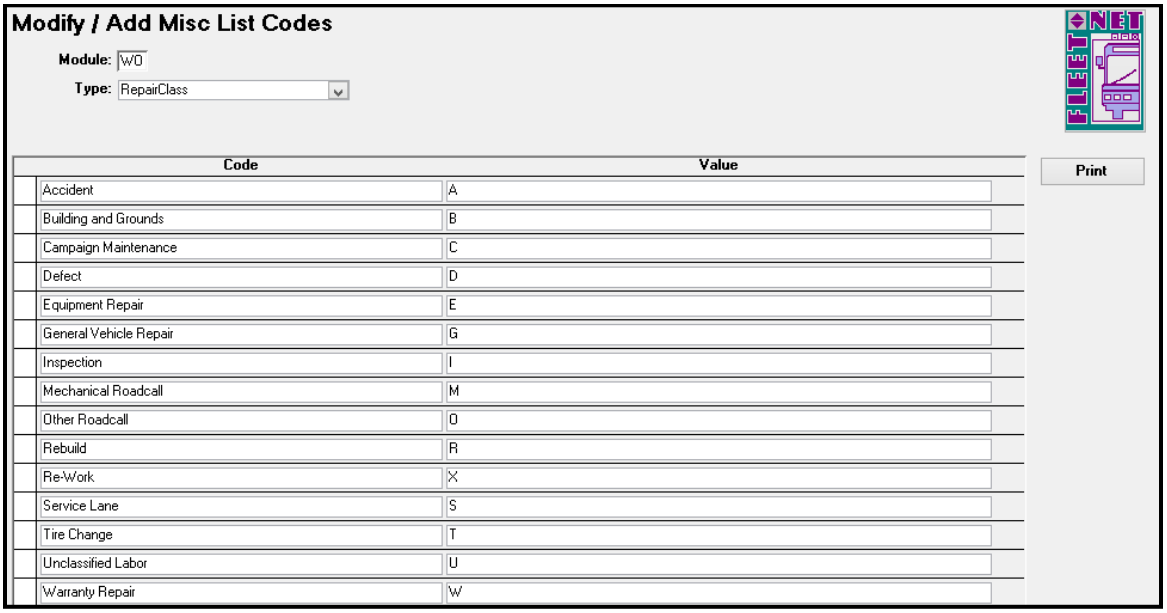
Code	Value
E	Equipment
F	Facility
G	Ground
S	Shelter

LocationCode: (User Defined)



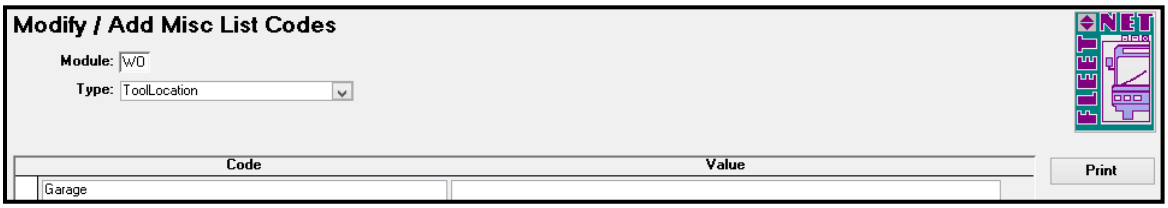
Code	Value
1	Main Garage
2	Downtown Center
3	On Road
4	MIIT
5	Asset Management
6	Illinois Terminal Assets

Repair Class: (Specific)

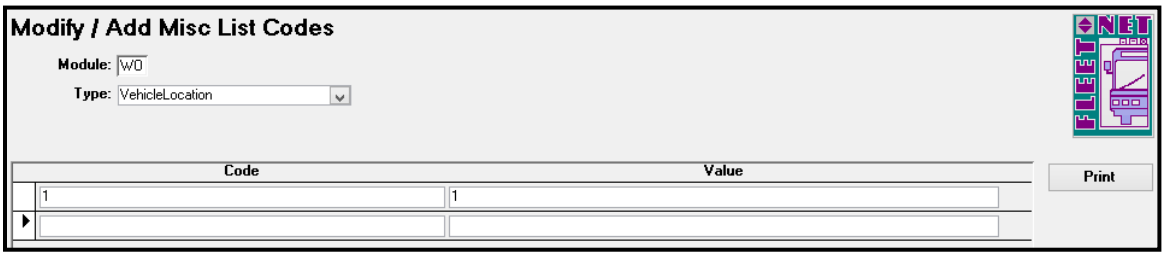


Code	Value
Accident	A
Building and Grounds	B
Campaign Maintenance	C
Defect	D
Equipment Repair	E
General Vehicle Repair	G
Inspection	I
Mechanical Roadcall	M
Other Roadcall	O
Rebuild	R
Re-Work	X
Service Lane	S
Tire Change	T
Unclassified Labor	U
Warranty Repair	W

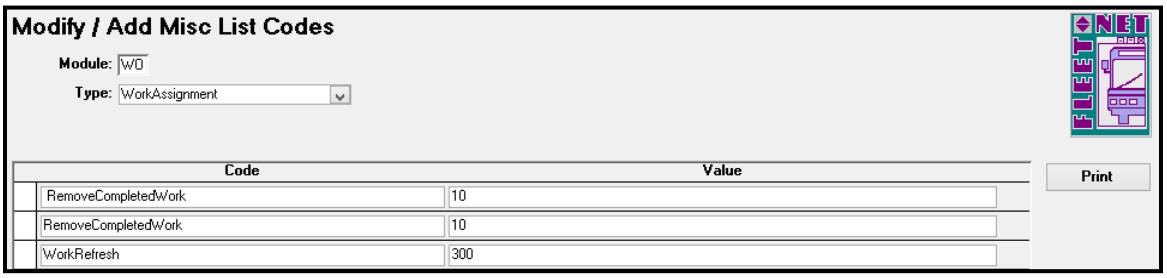
Tool Location: (User Defined)



VehicleLocation: (User Defined)

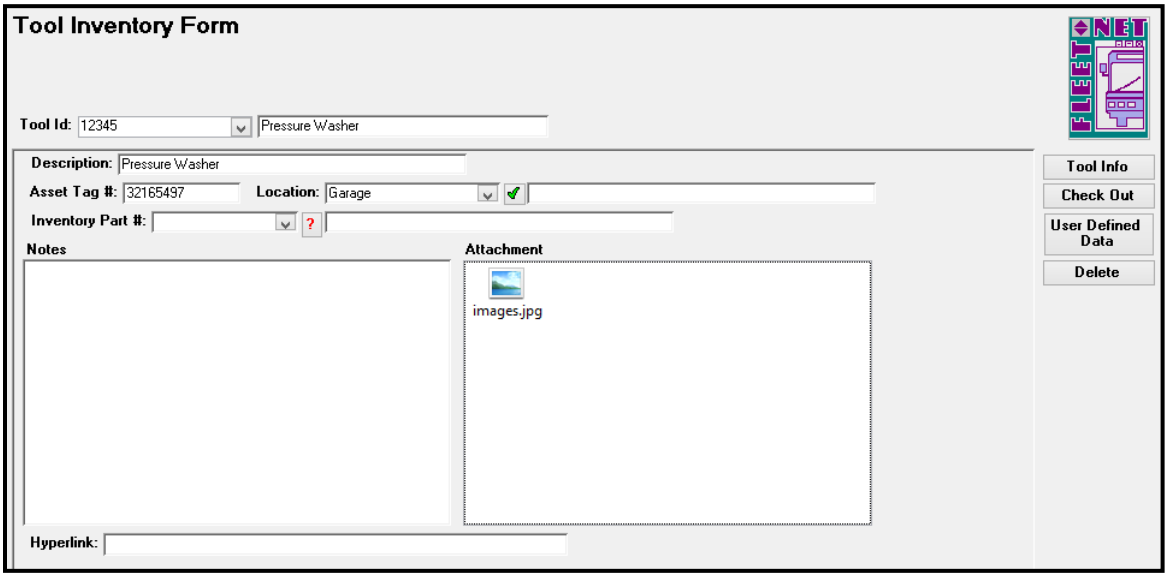


WorkAssignment: (Specific)



Modify/Add Tool Inventory

Use this form for inventory control of all tools. Click ***Delete*** to remove the selected tool from the inventory**.**



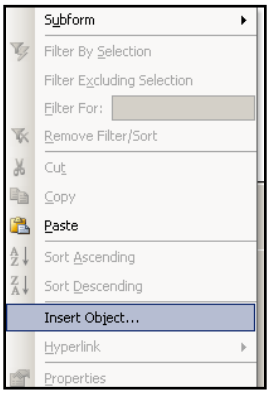
Tool ID allows for selection of existing tools already entered, via the drop-down list. This also allows entry of new tool items.

To add a new tool to your inventory, enter the tool id in that field and press Enter. The following message will display “Is This a New Tool Id?” and click ***OK*** and the form will display allowing entry of specific information pertaining to this tool item. The table below has descriptions of each field.

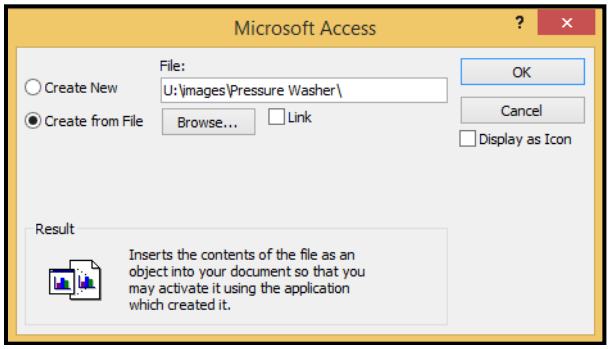
Field	Max Field Size	Field Type	Description
Tool ID	20	Alpha/Numeric	
Description	50	Alpha/Numeric	Enter a description of the tool.
Asset Tag #	20	Alpha/Numeric	Enter the asset tag number from the Fixed Assets module.
Location	30	Alpha/Numeric	Enter the tool’s storage location.
Inventory Part #		Alpha/Numeric	Enter the part # if this tool is included in the Inventory master
Notes	N/A	Memo	Enter comments pertinent to the described tool.
Attachment	N/A	OLE Object	Link documentation pertinent to the described tool. Right click in to add the attachment. Select Insert Object.
Hyperlink	255	Alpha Numeric	A hyperlink allows you to jump to another location. The location can include another file on your hard disk or company's network, website or email address

Attachments

To insert an attachment, right click in the **‘Attachment’** field and choose ***Insert Object***.



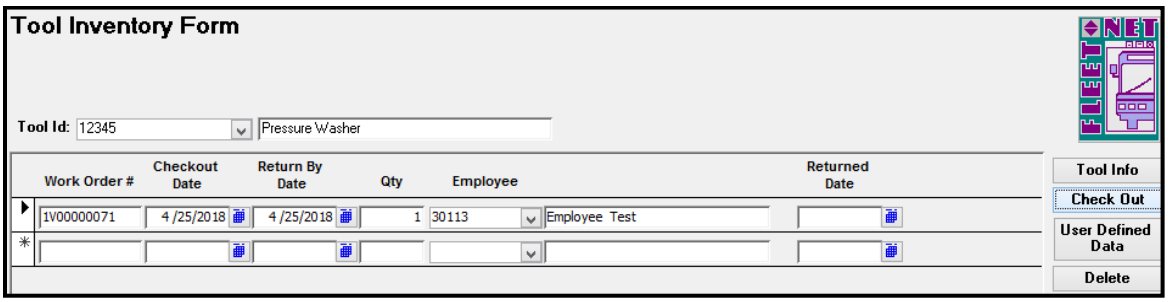
Select the Create from File option.
Browse to the document (document can be pdf, tiff, jpeg, Word, Excel, etc.)
Select the Link checkbox
Select the Display as Icon to only display the Type of document i.e. Word, Excel, PDF etc.
Click ***Ok***



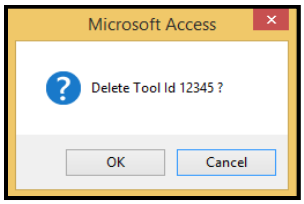
Check Out

Select ***Check Out*** to display all work orders this tool was checkout to.
The Work Order #, Check out Date, Return by Date, Quantity and Employee# fields are populated from Work Order Entry.

Enter the Returned Date for tracking purposes.



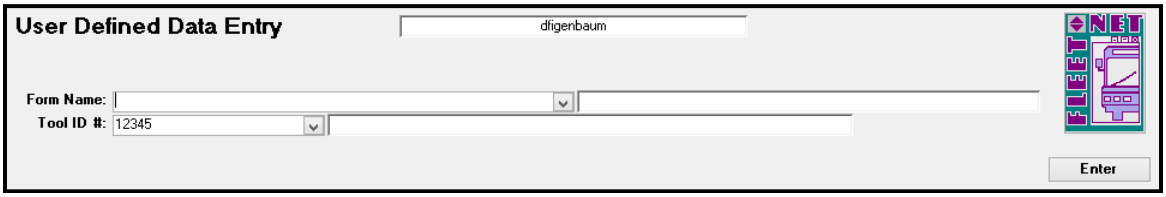
Delete to remove the selected tool from the inventory**.**



User Defined Data Entry

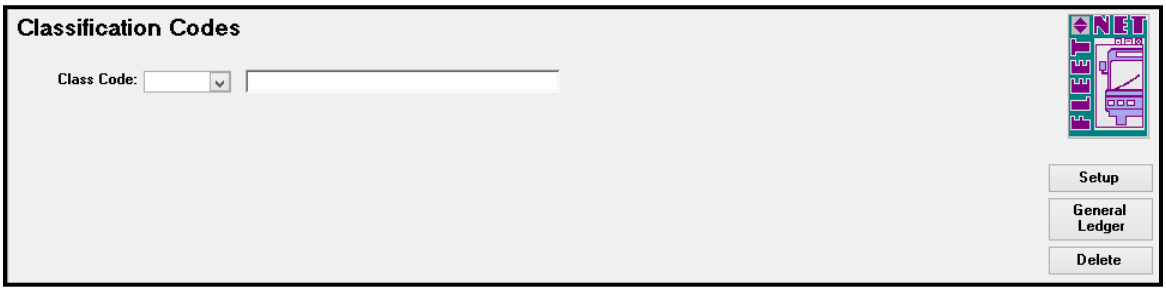
User Defined Data forms and fields can be entered to track additional information for tool inventory. Once setup is completed, data may be entered via the Tool Inventory Form User Defined Data button or on the User Defined Data Entry Form menu item.

The users name that is logged in will display

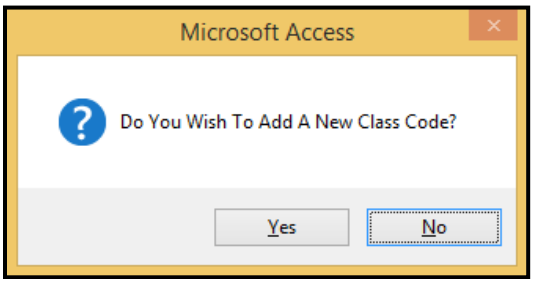


Modify/Add Class Codes

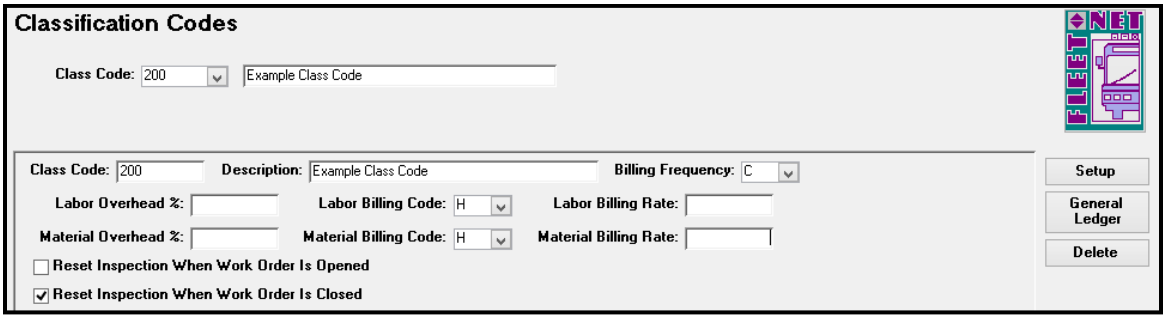
Define the Classification Codes used to reference what type of vehicle or asset is being worked on. This code controls the General Ledger distribution for Labor and Material entries as well as defining when inspection work orders roll over. Each Work Order, when generated, must have an assigned Class Code.



To add a new Class Code
Select a **Class Code** from the drop-down list, or add a new class code by entering the code in the field and press enter. The following prompt displays.



Click ***OK*** to add a new Class Code, up to 4 alphanumeric characters. Click ***Setup*** to enter labor and material overhead percentages and/or billing markups, if applicable. Also, flag inspection reset option. Refer to table for field descriptions.



Field	Max Field Size	Field Type	Description
Class Code	4	Alpha/Numeric	Select from the drop-down list or add a new class code
Description	30	Alpha/Numeric	Enter a description for this class code. Some examples would be; Fixed Route, Demand Response, Service Vehicles
Billing Frequency			Future development
Labor Overhead %		Numeric	Enter the overhead percentage (%%%.%%) applicable to labor. Use this option for any additional incidental costs that are not already included in labor based on the Employee Setup pay rate. For example, health insurance or other benefits for mechanics. The overhead cost calculation will be updated to the asset (vehicle, component, etc.) as labor overhead costs.
Material Overhead %		Numeric	Enter the overhead percentage (%%%.%%) applicable to materials used to complete work. Use this option for any additional incidental costs not already included in material, for example utilities or other costs related to doing the work. The overhead cost calculation will be updated to the asset (vehicle, component, etc.). This overhead will be added to material cost.
Labor Billing Code (Not User Defined)	1	Alpha Numeric	Used for markups for Customers Select H or P **H** - Applies billing markup on an hourly basis. **P** - Applies billing markup as a percent of the total cost.
Material Billing Code (Not User Defined)	1	Alpha Numeric	Used for markups for Customers Select H or P **H** – Quantity of items used are multiplied by the flat rate entered in Material Billing Rate. **P** - A percentage markup being applied to any material used.

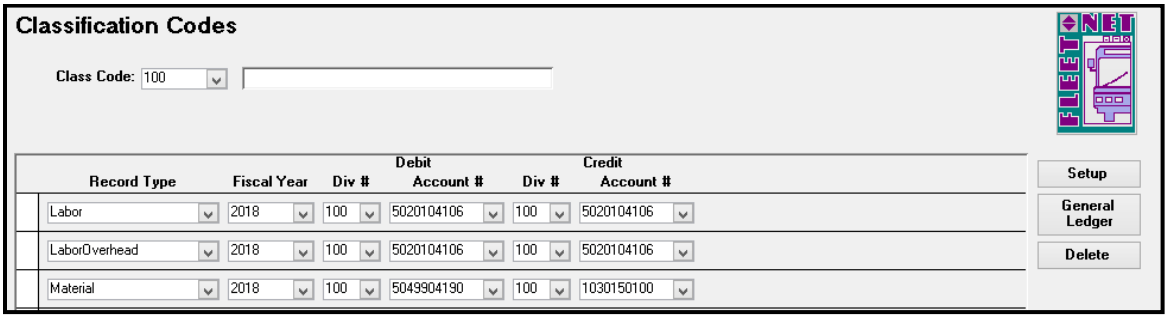
Labor Billing Rate Used for markups for Customers	Enter the billing rate. If the markup is applied on an hourly basis, enter a dollar amount applied per hour. This would only apply to WOs with an assigned Customer Number. The result displays only on the Total button, not on the work order update reports.
Material Billing Rate Used for markups for Customers.	If **H** was entered, enter a dollar amount denoting the cost applicable to each unit of material used to complete work. If **P** was entered, enter the percentage rate. Each unit of material used will be marked up by this percentage.

Select the preference for Resetting Inspections by selecting the appropriate checkbox.

Reset Inspection When Work Order is Opened	Will reset the inspection in Vehicle Master once the Work Order has been **Updated** the first time
Reset Inspection When Work Order is Closed	Will reset the inspection in Vehicle master once the Work Order has been **Closed and Updated**

Click ***General Ledger*** to enter the General Ledger debit and credit account numbers for Material, Labor, Overhead, Outside Services, and Billing costs.

Check with accounting personnel before selecting entries.

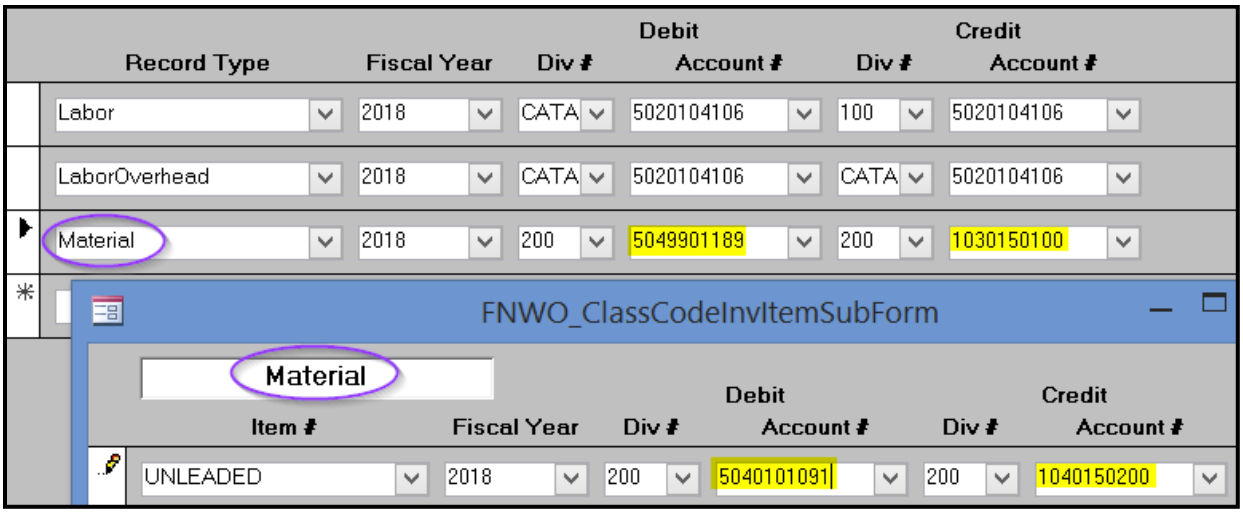


Field	Max Field Size	Field Type	Description
Record Type (Not User Defined**)**			Select a record type using the drop-down list. *Below are record type setups in the Misc. Codes and are not User defined. Only these codes may be used.* Billing / Billing Labor / Labor LaborOverhead / Labor Overhead Material / Material MaterialOverhead / Material Overhead OutsideServices / Outside Services
Material			
Fiscal Year	4	Numeric	Select the Fiscal Year from drop-down. This will filter the division and account # drop-down list. Fiscal year needs to be changed only if the Division and Account #'s no longer exist in a new fiscal year.
Debt Div. #	4	Alpha/ Numeric	Select the Division # to post transactions for the record type as setup in General Ledger
Debit Account #	10	Alpha/ Numeric	Select the Account # as setup in General Ledger - Debit is typically an Expense account such as Fixed Route Bus Repair Parts.
Credit Div. #	4	Alpha/ Numeric	Select the Division # to post transactions for the record type as setup in General Ledger
Credit Account #	10	Alpha/ Numeric	Select the Account # as setup in General Ledger - Credit is typically an Asset account such as Parts Inventory.
Material Overhead			
GL Divisions and Accounts should be determined by the Finance Department. To have the General Ledger transactions generated for these record types is optional. If overhead is entered through the setup form and no GL accounts assigned, the overhead cost will be applied to the asset without any GL transactions. Examples of the types of accounts that can be used are expense and contra expense.			

Material and/or Material Overhead Record Types are the only record types for which GL account numbers may be overridden. This may be necessary if, for example, consumable items, such as fuels and/or oils or grant parts costs that should post to different GL account numbers.

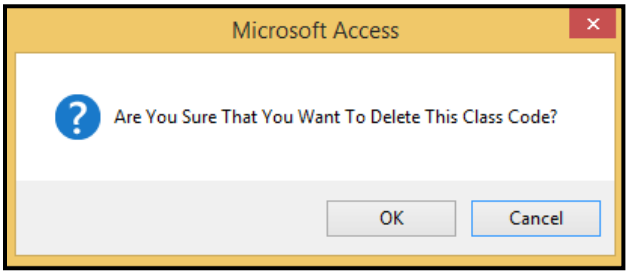
To override the GL accounts for the Material and/or Material Overhead for a selected Class Code, double-click on Record Type and a sub form will display (see below). Select the inventory Item #, Fiscal Year, Div #, Debit Account # and Credit Account # that will be used for inventory items when issued on Work Orders.

In the example below, GL transactions for Material will be distributed to Debit Account # 5049901189 and Credit Account # 1030150100 **except** the Item # Unleaded, those transactions will be distributed to Debit Account # 5040101091 and Credit Account # 1040150200.

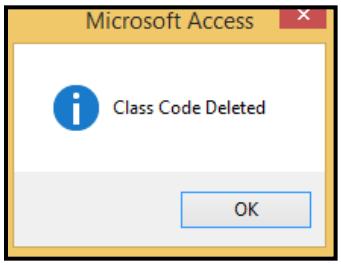


Field	Max Field Size	Field Type	Description
Item #	20	Alpha/ Numeric	Select the applicable Inventory Item # from the drop-down for override of the originally assigned credit and debit accounts.
Fiscal Year	4	Numeric	Select the Fiscal Year from the drop-down.
Debit Div#	4	Alpha/ Numeric	Select the Division # to post transactions for the record type.
Debit Account #	10	Alpha/ Numeric	Select the Inventory GL Expense Account # for this item when assigned to this work order class code.
Credit Div#	4	Alpha/ Numeric	Select the Division # to post transactions for the record type.
Credit Account #	10	Alpha/ Numeric	Select the Inventory GL Asset Account # for this item when assigned to this work order class code

Select ***Delete*** to delete the selected class code. The following prompt displays.



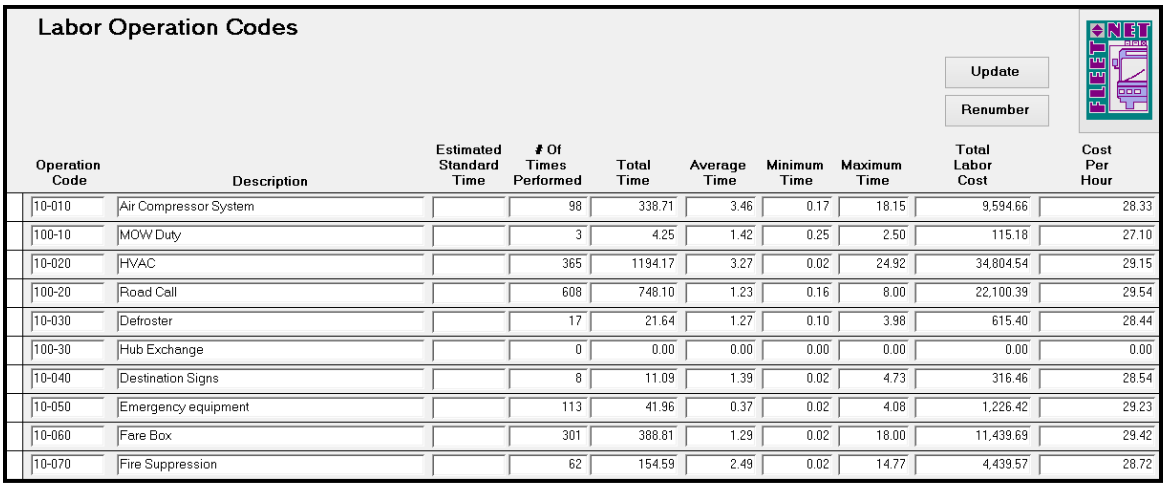
Click **OK** to delete or **Cancel t**o cancel this action. If OK is selected, the following message displays.



Labor and Labor Overhead
GL Divisions and Accounts should be determined by the Finance Department. It is not necessary to have the General Ledger transactions generated for these record types. If labor and overhead is entered through the setup form and no GL accounts assigned, the labor and overhead costs will be applied to the asset without any GL transactions. Examples of the types of accounts that can be used are expense and contra expense, which should be the same as the payroll labor accounts.
Billing
GL Divisions and Accounts should be determined by the Finance Department. It is not necessary to have the General Ledger transactions generated for these record types. This would only apply to WOs with an assigned Customer Number. This option does not update to the Customers or generate transactions in the Accounts Receivable module. Based on the Billing Code and Rate, GL transactions will be generated, which could be useful for tracking markups to invoice customers. Reports would need to be written to track billing markups to invoice customers.
Outside Services
GL Divisions and Accounts should be determined by the Finance Department. It is not necessary to have the General Ledger transactions generated for these record types.

Labor Operation Codes

Labor Operation Codes are codes that specifically describe a type of mechanical repair and are used to measure the labor hours expended when performing specific tasks to establish in-house labor standards. These standard labor codes should be comparable to the labor standard categories established by the manufacturers to give the transit property an idea of how their operation compares with outside industry standards. Below are field descriptions. The calculations are all based on entries made through work order labor line items.



Operation Code	Description	Estimated Standard Time	# Of Times Performed	Total Time	Average Time	Minimum Time	Maximum Time	Total Labor Cost	Cost Per Hour
10-010	Air Compressor System		98	338.71	3.46	0.17	18.15	9,594.66	28.33
100-10	MOW Duty		3	4.25	1.42	0.25	2.50	115.18	27.10
10-020	HVAC		365	1194.17	3.27	0.02	24.92	34,804.54	29.15
100-20	Road Call		608	748.10	1.23	0.16	8.00	22,100.39	29.54
10-030	Defroster		17	21.64	1.27	0.10	3.98	615.40	28.44
100-30	Hub Exchange		0	0.00	0.00	0.00	0.00	0.00	0.00
10-040	Destination Signs		8	11.09	1.39	0.02	4.73	316.46	28.54
10-050	Emergency equipment		113	41.96	0.37	0.02	4.08	1,226.42	29.23
10-060	Fare Box		301	388.81	1.29	0.02	18.00	11,439.69	29.42
10-070	Fire Suppression		62	154.59	2.49	0.02	14.77	4,439.57	28.72

Field	Max Field Size	Field Type	Description
Operation Code	6	Alpha/ Numeric	Enter a code for the specific maintenance task.
Description	30	Alpha/ Numeric	Enter the description of the task
Labor Standard Time		Decimal Time	Enter the average or standard number of hours required to complete the operation based on industry standards. Labor Standard Time is revised by user, not by Fleet-Net
# Of Times Performed	N/A	Numeric	Automatically calculated field when update is run
Total Time	N/A	Numeric	Automatically calculated field when update is run
Average Time	N/A	Numeric	Automatically calculated field when update is run
Minimum Time	N/A	Numeric	Automatically calculated field when update is run
Maximum Time	N/A	Numeric	Automatically calculated field when update is run
Total Labor Cost	N/A	Numeric	Automatically calculated field when update is run
Cost Per Hour	N/A	Numeric	Automatically calculated field, divides Total Labor Cost by Total Time.

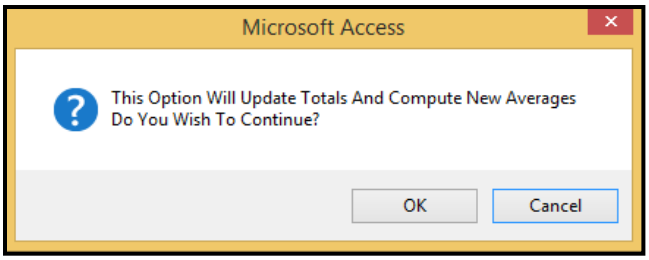
Calculation will be run on all work orders for this date range and calculate the average for each specific task and update the fields to the new standards for the maintenance facility. The facility can review its performance by comparing the Totals and new averages to industry standards.

The calculated fields will remain until user runs update process for another date range.

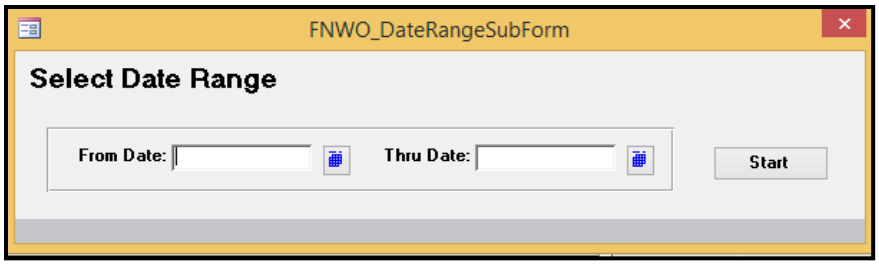
Update

To update the total, average, minimum and maximum times based on hours entered through work order labor line items. Costs per hour and Total Labor Costs are also calculated.

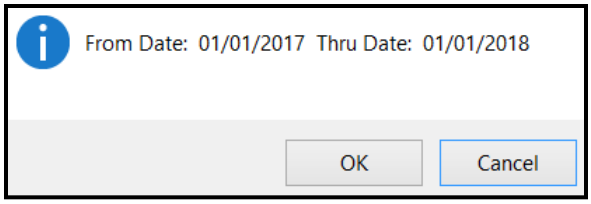
The following message will display.



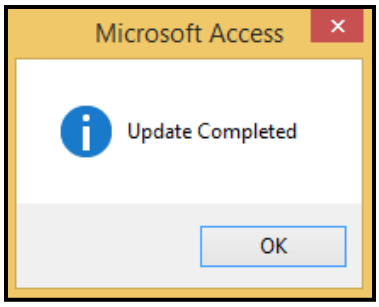
If **OK** is selected, the following message will display.



Enter the date range you wish to use for calculating the new averages for all Labor Operation Codes and click ***Start*** to activate the calculation. The following message displays:

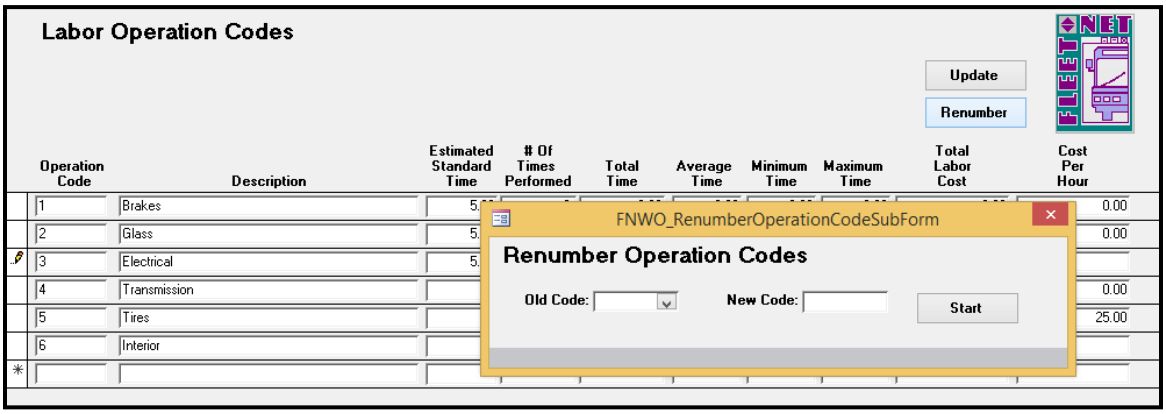


When update is complete, the following message with display.

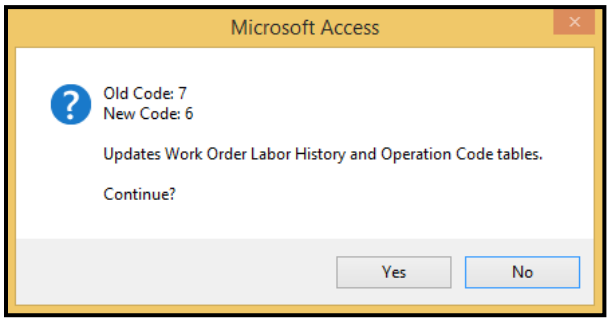


Renumber

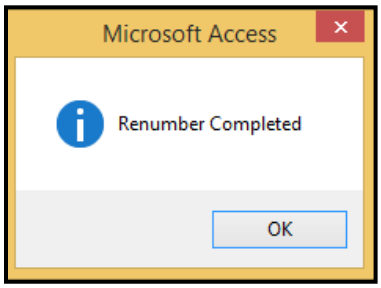
If user needs to change a number, perhaps add a Z to the beginning of a Labor Code that is no longer used, Click ***Renumber***. The following screen displays. Enter the old and new codes and click ***Start.***



The following will display.



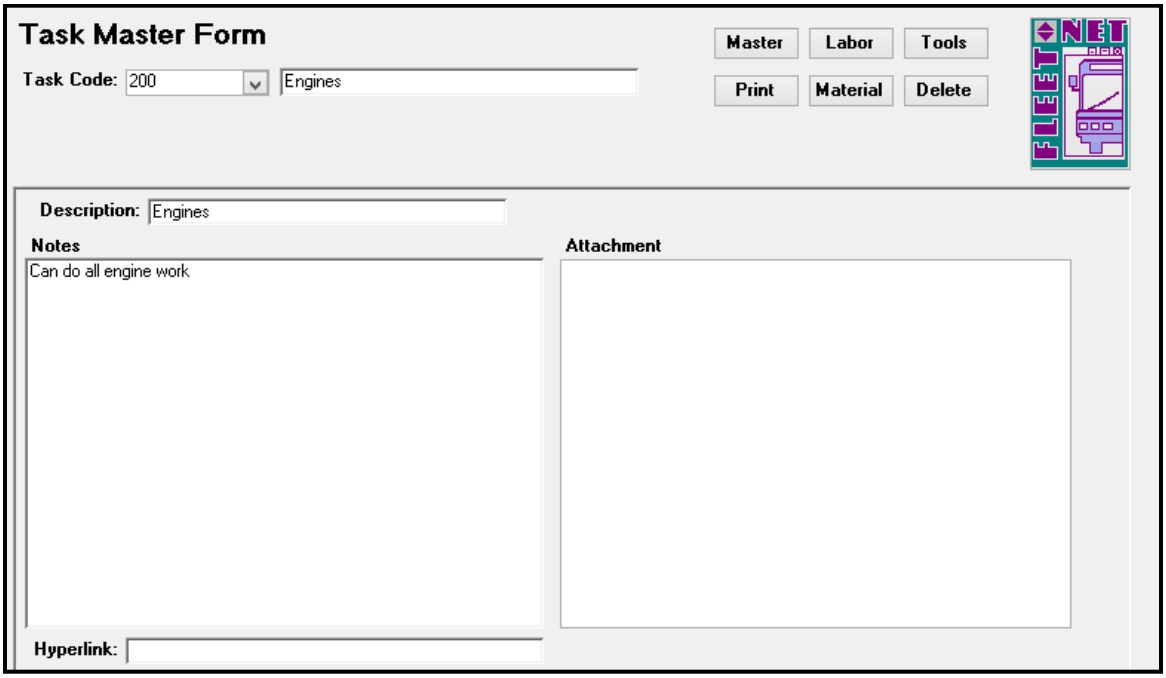
When complete, the following will display.



Modify/Add Tasks

Define maintenance tasks by associating labor operation codes, materials and tools used to perform the tasks. The tasks can then be assigned to each employee to define their specific skill level set via Skills in Employee Setup.

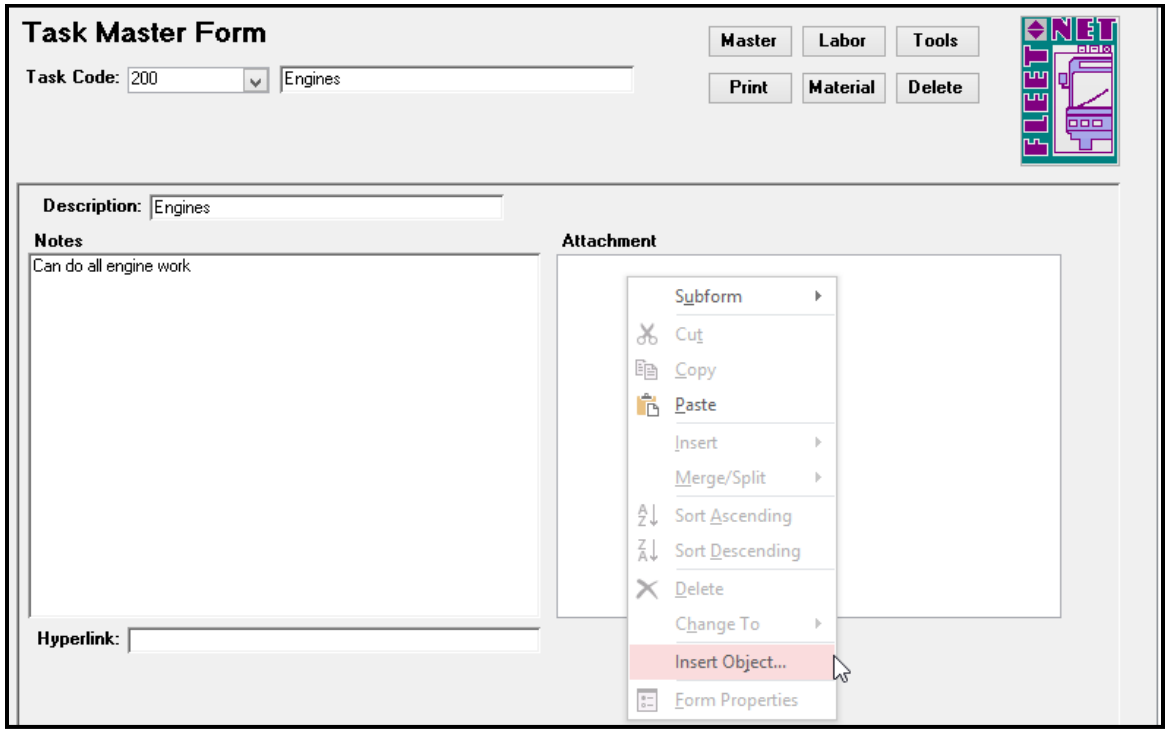
Tasks can be assigned to a Work Order so that the Labor and Material costs associated with a task will be estimated via the Work Order Totals form.
Click ***Master*** to display the main form at any time with task description, notes and attachments.



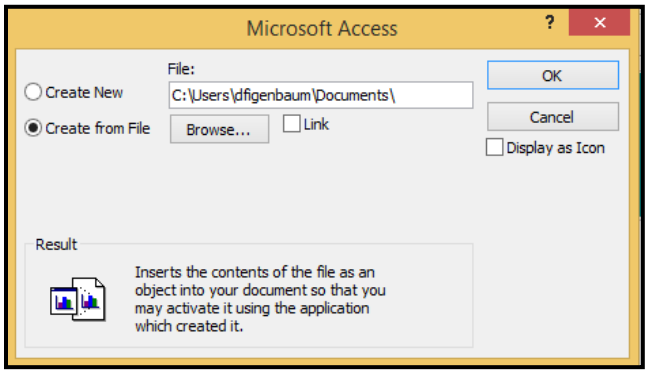
Field	Max Field Size	Field Type	Description
Task Code	10	Alpha/ Numeric	Select a task code. To create a new task, enter a code (up to 10 alpha-numeric characters)
Description	50	Alpha/ Numeric	Enter a description for the task (up to 50 characters).
Notes	N/A	Memo	Enter comments pertinent to the described task.
Attachment	N/A	OLE Object	Insert documentation or images pertinent to the described task. Right-click in the Attachment field. Select **Insert Object**. (Refer to Table and Figure for more detailed instructions on how to add attachments.)
Hyperlink	255	Alpha/ Numeric	A hyperlink allows you to jump to another location. The location can include another file on your hard disk or company's network, website or email address.

Attachments

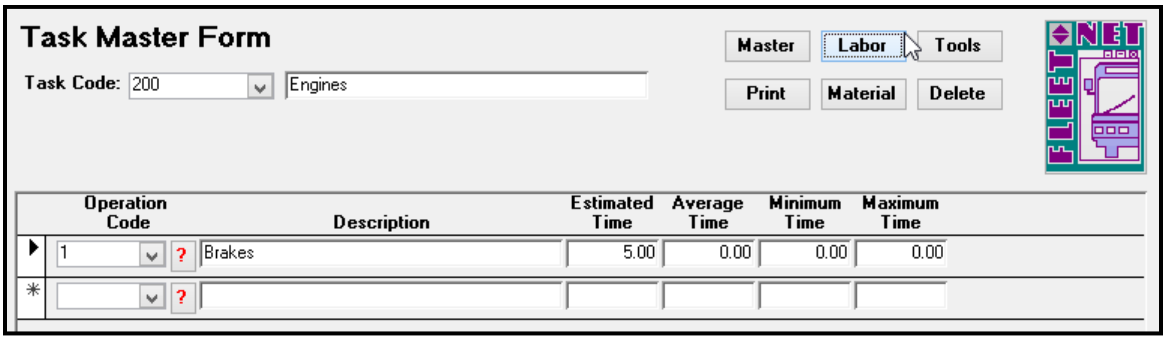
To insert an attachment, right click in the **'Attachment'** field, choose ***Insert Object.*** You can use Windows Paint to resize an object if pasting it in the space provided.



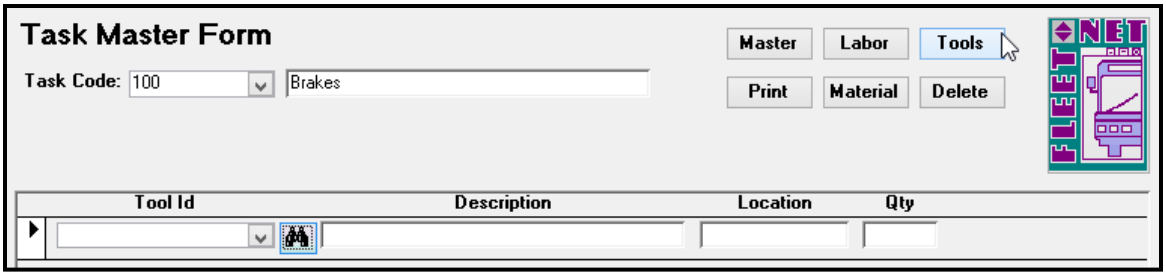
Select the Create from File option
Browse to the document
Select the Link checkbox
Select the Display as Icon to only display the Type of document i.e. Word, Excel, PDF
Click ***Ok***



Click ***Labor*** to enter the Labor Operations Codes. The estimated labor cost will be calculated from the Labor Operations Codes Labor Standard Time multiplied by the cost per hour.
Select the Operation Code from the drop-down list for the specified task or use the binoculars to search.
The following form displays.

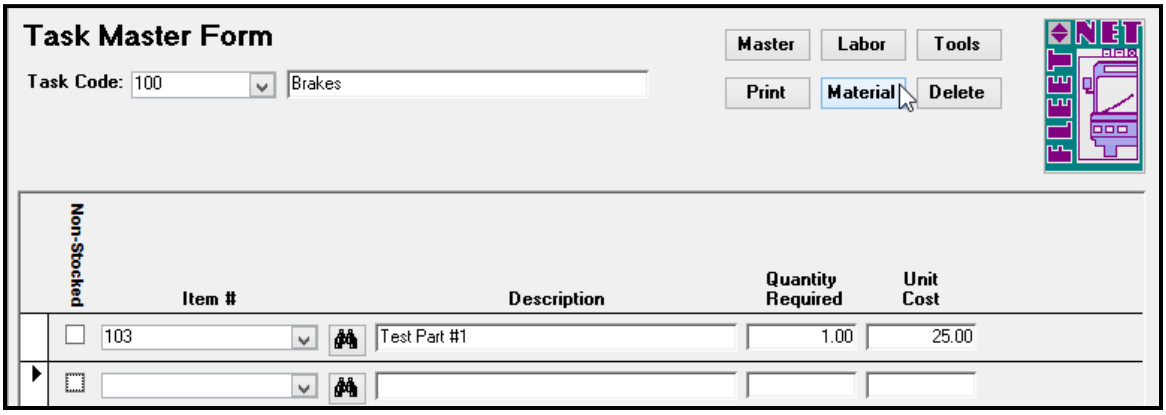


Click ***Tools*** to enter tools used to perform the specified task. The following form displays.



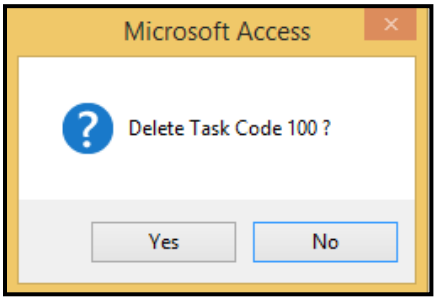
The tools must first be entered in Modify/Add Tools section of Work Order Setup. Once they are set up, they are available for selection in the 'Tool Id #' drop-down list. Select each tool necessary for completion of the specified task. The form also displays the Description, Location and Qty of the tool available.

Click ***Material*** to enter all necessary materials for the completion of the specified task.



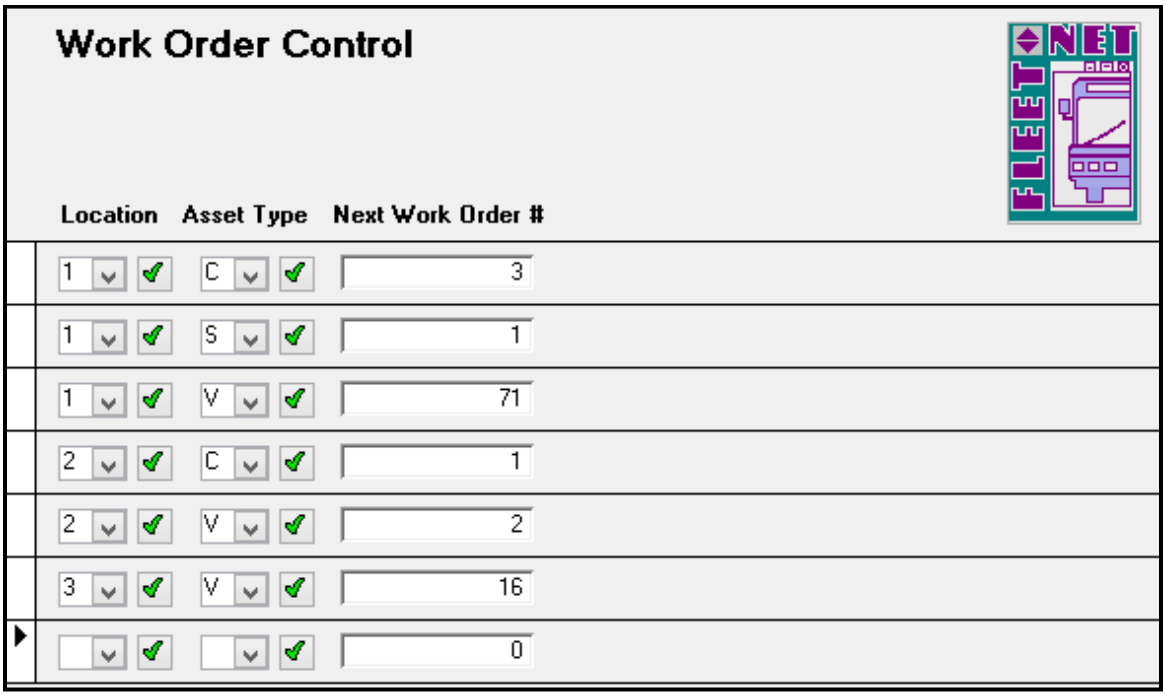
Field	Description
Non-Stocked	Both non-stock and stock items can be added to the task list. Click checkbox for any non-stocked items.
Item #	Select the inventory item number from the drop-down list. Only active inventory items are available from the drop-down list.
Quantity Required	Enter the quantity of items required for the specified task.
Unit Cost	**Enter the cost of <u>non-stocked</u> items <u>only</u>.** Stocked Inventory item costs are not needed. The average cost for inventory items will be used to estimate the material costs.

Click ***Delete*** to delete any Task Code no longer utilized. The following message will display:



Work Order Control

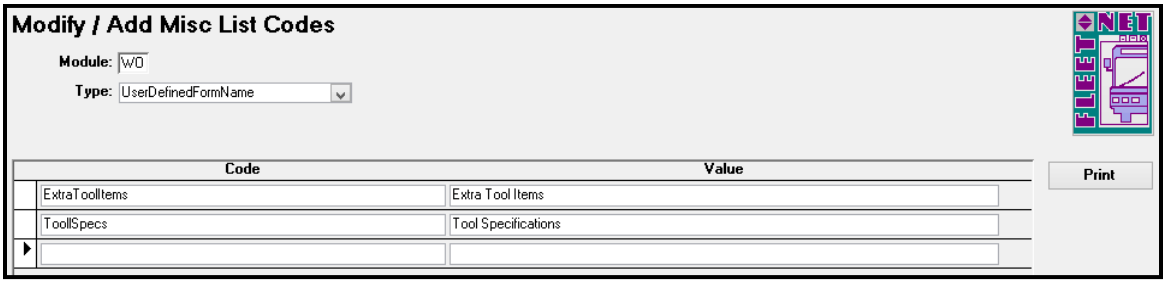
Work Order Control is the master control from which the system determines what the next sequential work order number will be when creating new work orders. The form allows the setup of next work order numbers for different locations and asset types. This setup allows the user to more readily identify work orders based on location and asset type setups.



Field	Description
Location	Select a location (i.e., Main Garage, Road, Buildings & Grounds, etc.)
Asset Type	Select an asset type. (i.e., **C** = Component, **V** = vehicle, **I** = Inventory, **O** = other, etc.) O is the only asset type that will not be limited to the list when generating a Work Order
Next Work Order #	Enter the next work order number for the specific combination, location (section) and asset type. For new installations, leave Next Work Order # as zero '0' and the first work order created will become 1 at the sequence portion of the number. An example of how the work order number may generate is: 1C00000064 **1** = Location, **C** = Component work order, 00000**64** = the sequence portion of the number. In this example, the work order # 64 indicates 1 for location, C for asset type Components, and sequence Next Work Order # 64. The sequence portion of the number increments each time a work order is created.

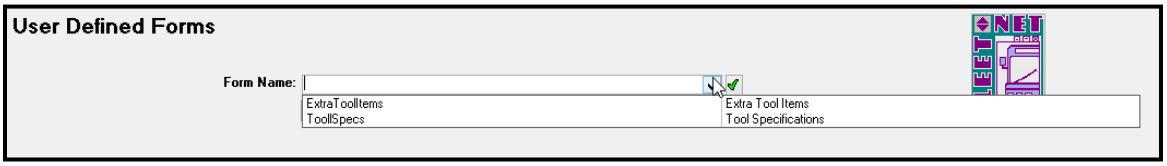
User Defined Data Form Setup

Setup forms with fields for all information
Click the green check mark to add a new form name and description.



Type is UserDefinedFormName
Code – Enter the Name of the form
Value – Enter a description of the form

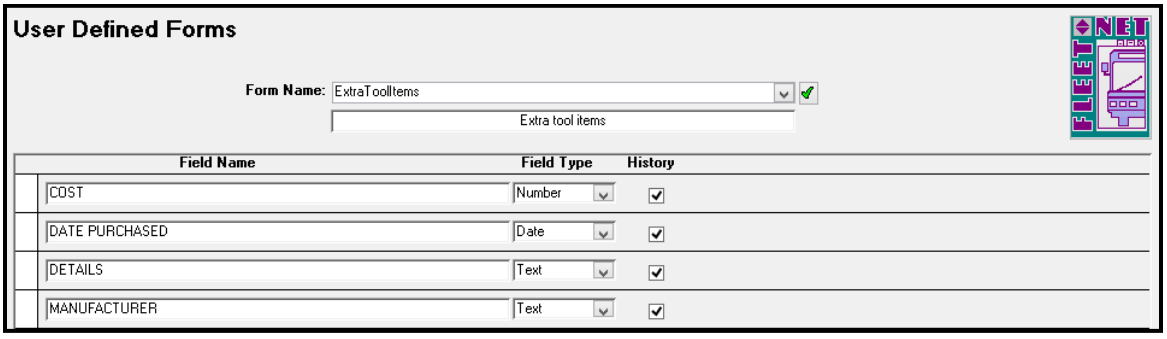
Select the Form name to define fields and data types for each field.



Multiple fields can be entered for each form name

Select Text, Date or number Field Type for each field. Data entry is restricted to this type when entering data.

History – check this box for each field for changes to be tracked.

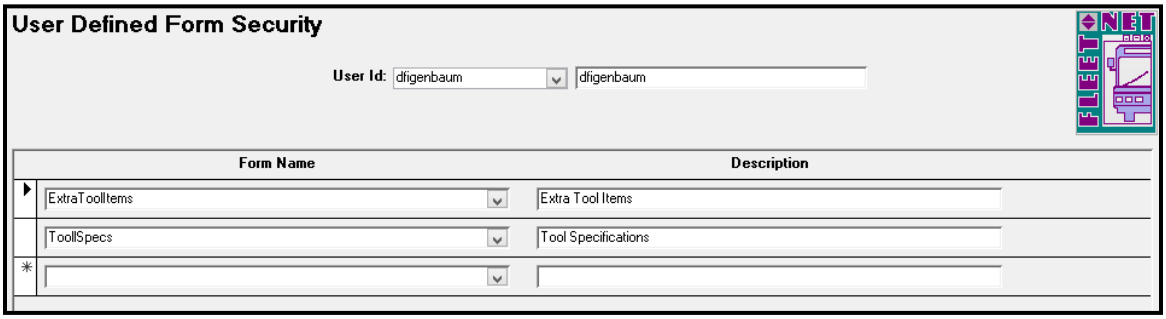


User Defined Data Security Setup

Use this form to assign access to users enabling them to enter data.

Select the User Id from the drop-down.

Select all the forms that this user should have access to data entry

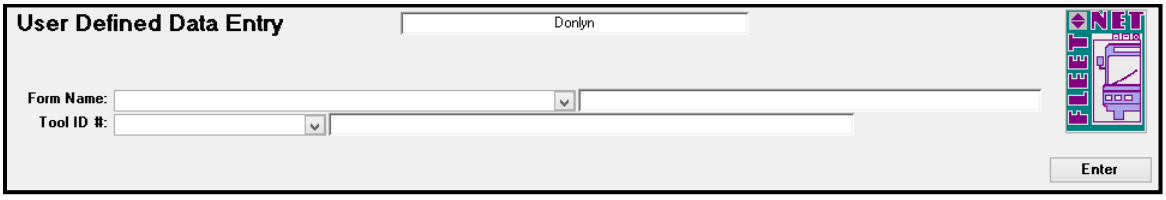


User Defined Data Entry

User Defined Data forms and fields can be entered to track additional information for tool inventory.

Once setup is completed, data may be entered via the Tool Inventory Form User Defined Data button or on the User Defined Data Entry Form menu item.

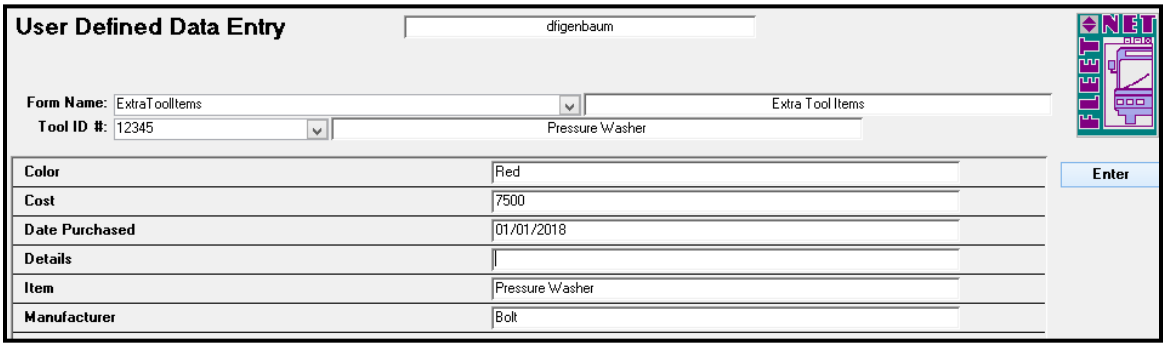
The users name that is logged in will display



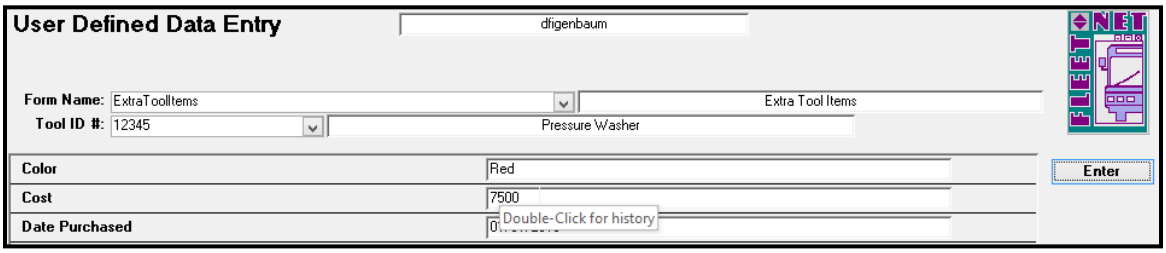
Form Name – Select the form name to enter data. Only forms assign via User Defined Data Security will be available in the drop-down list

Tool ID # select the tool Id
Click ***Enter*** to complete

Each field on the specified form displays, enter the applicable data for each field (max 50 characters).

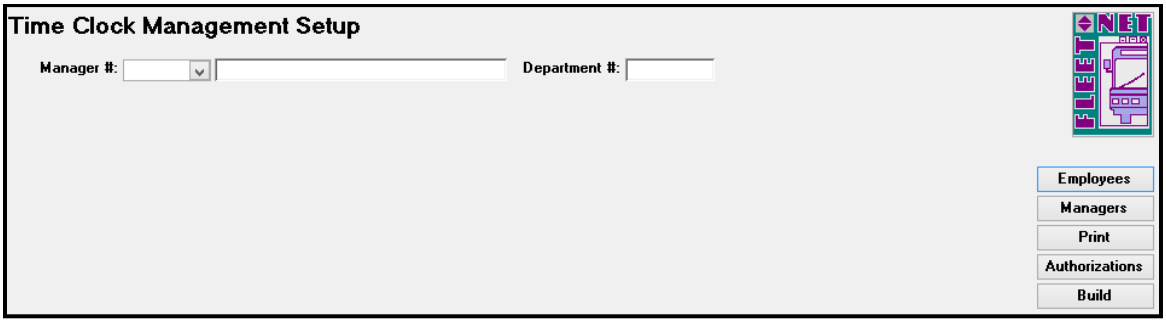


Hover over and Double click for history if available.



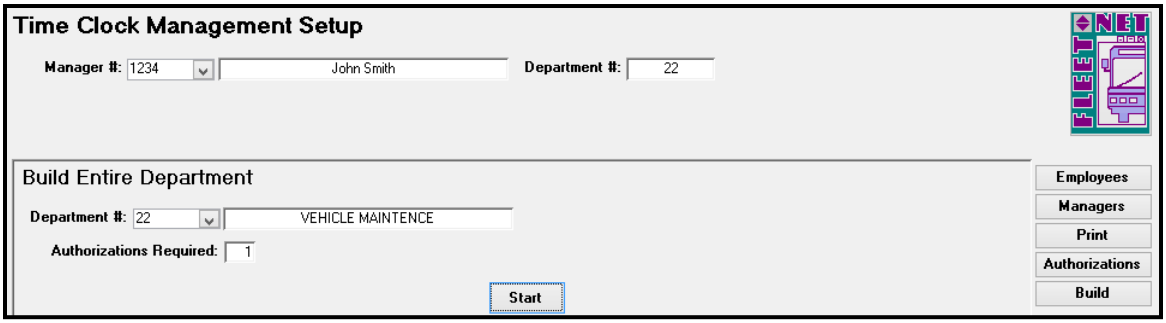
Time Clock Management Setup

This form is used to assign employees to the Managers, when using the Time Clock feature in Fleet-Net. This setup feature should be restricted via menu security to IT or supervisors.



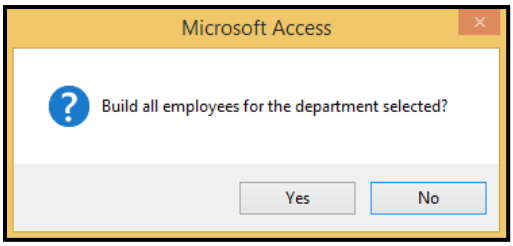
Field	Description
Manager #	Select the employee number for the manager for whom setup is being built.
Department #	The department that the selected employee is in will display.
Employee #	Select the employee numbers for the employees assigned to the selected manager. If employees are manually added, the Authorizations Required setup must also be completed manually. *See below for an explanation of the Build feature which will automate assigning employees to the selected manager.*
Description	The name of the selected employee will display.
Department #	The department number of the selected employee will display.

Click ***Build*** to automate the employee assignment process; the following form displays.



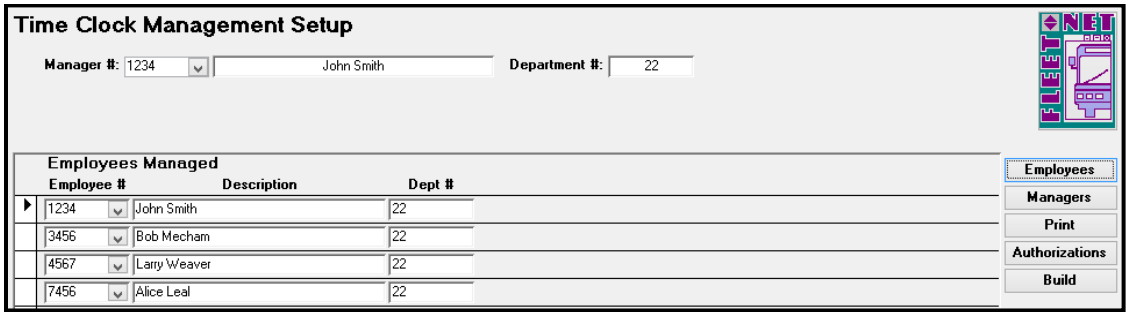
Field	Description
Department #	Select the department number to assign to the selected manager. All employees with an active payroll status from each of the selected departments will be assigned to the manager. Employees can be deleted individually from assignment to the selected manager after the build completes. (See Below)
Authorizations Required	Enter the number of managers who must approve a time card or a time sheet prior to transferring the data to payroll. The number of authorizations can be edited for each employee after the build completes. (See Below)

Click ***Start***, the following prompt displays.

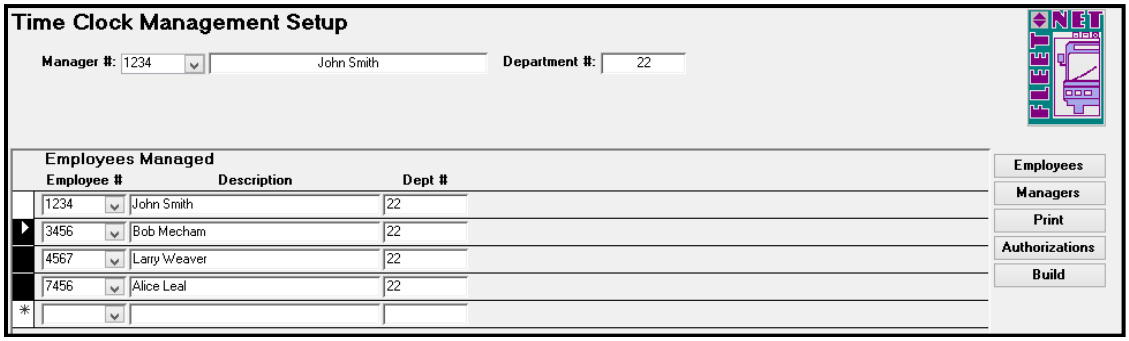


Click ***Yes*** to delete the employees from the selected department from assignment to the selected manager. Click ***No*** and employees from the selected department that are not currently assigned to the selected manager will be added to the list.

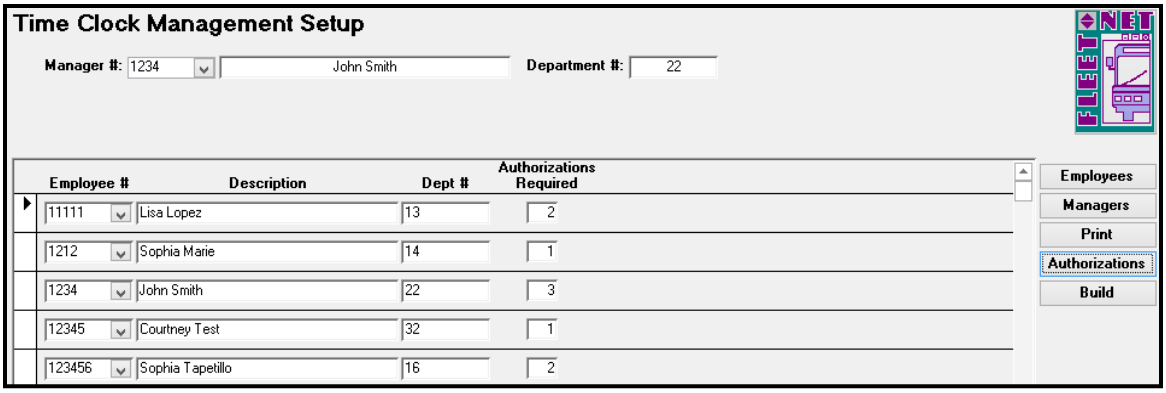
The Build Complete message displays; click ***OK***. Click ***Employees*** to view a list of the employees assigned to the selected manager; the following form displays.



If specific employees should not be assigned to the selected manager but were members of the department assigned to the manager, they can be deleted. Click on the field to the left of the applicable employee number. Once selected, the field will be highlighted in black. Press ***Delete*** on the keyboard, click ***Yes*** on the deletion confirmation message. Multiple sequential records can be selected by clicking on the field to the left of the first employee number while holding down the shift key and clicking on the field to the left of the last employee number. The field to the left of the employee numbers for the selected records will be highlighted in black as shown below. Press ***Delete*** on the keyboard, click ***Yes*** on the deletion confirmation message.

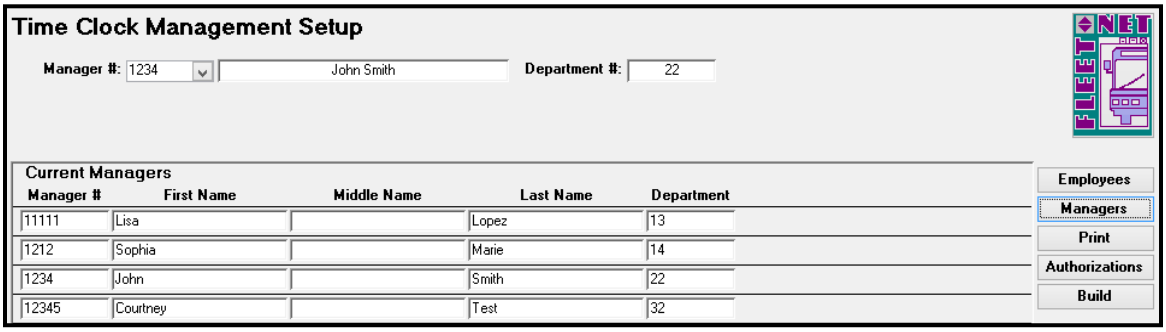


Click ***Authorizations*** to view and/or edit the number of manager authorizations required for all employees who will need to have their time authorized, the following form displays:

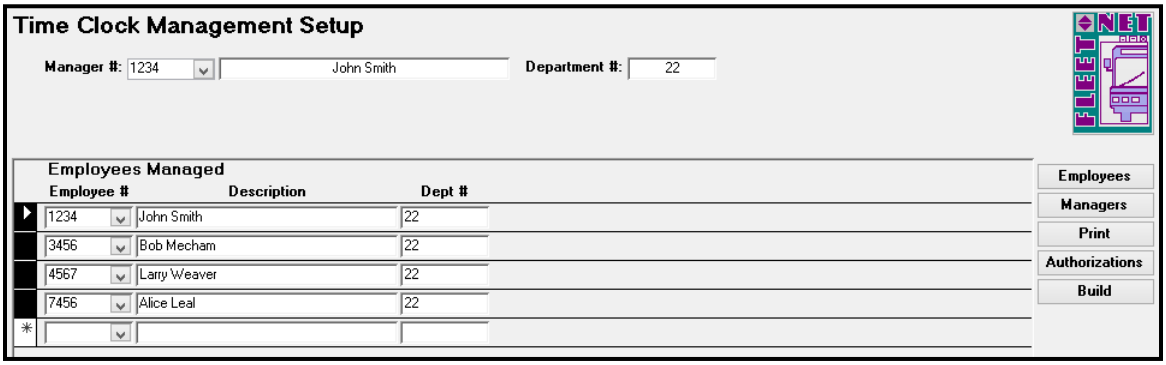


The authorizations listed for each employee are those that were assigned during the Build process. To edit the number of authorizations for a specific employee, type the applicable number in the Authorizations required field for that employee. This field cannot be left blank.

Click ***Managers*** to view a list of all employees who have been designated as managers; the following form displays.



If a manager needs to be removed from the list, select the manager from the drop-down list, click ***Employees***. Delete all the employees assigned to the manager by clicking on the field to the left of all employee numbers. Multiple records can be selected by clicking on the field to the left of the first employee number while holding down the shift key and clicking on the field to the left of the last employee number. The field to the left of the employee numbers for the selected records will be highlighted in black as shown below. Press ***Delete*** on the keyboard, click ***Yes*** on the deletion confirmation message. The manager will no longer display when ***Managers*** is selected.



Work Order Entry

The Work Order Entry form allows for the generation of maintenance work orders for assets such as vehicles, components, inventory, buildings & grounds, etc.

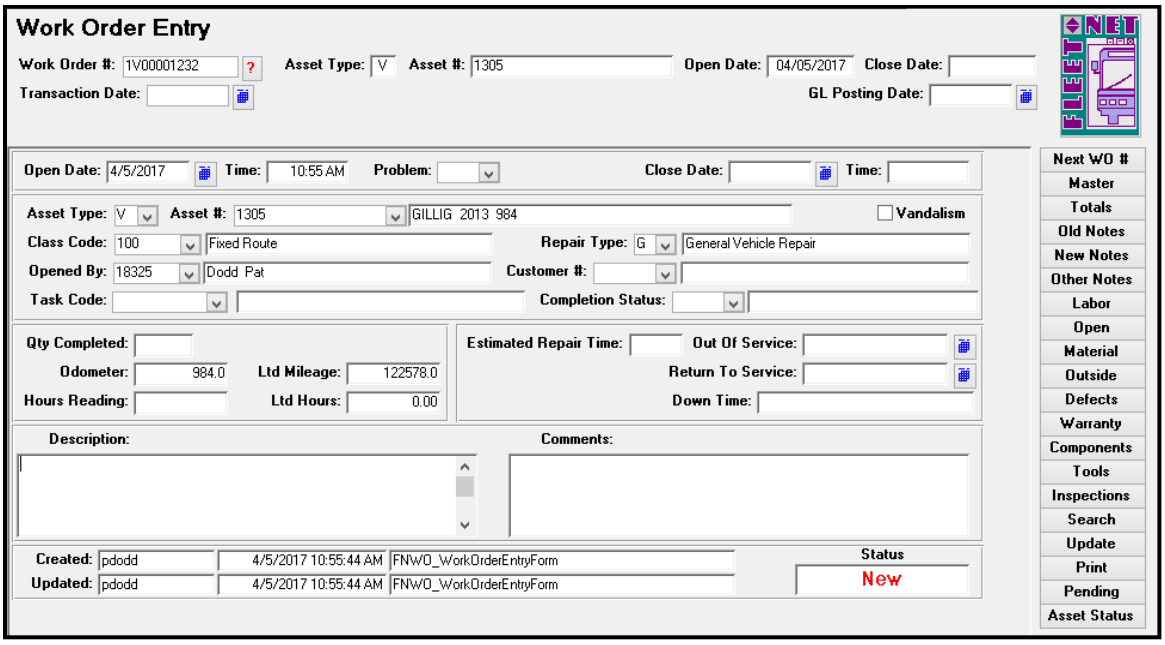
A brief summary of the processes allowed through this form are:

a. Materials issued on work orders reduce inventory and update the vehicle/components master history parts, when the work order is updated.
b. Labor entries update costs to the vehicle/component's master history when the work order is updated. Outside Labor may also be entered.
c. Inspection work orders for Vehicle and Components roll over the next inspection due in the Vehicle Master, based on selection specified in Modify/Add Class Codes.
d. Rebuild work orders on inventory items, once completed, increase Inventory quantities.
e. Current Warranties assigned to Vehicles and components are displayed when a work order is generated.
f. Road calls are updated in the Vehicle Problems module and number of failures for Mechanical Road calls are tracked for fleet performance.
g. Deferred Defects are updated in the Vehicle Problems module.

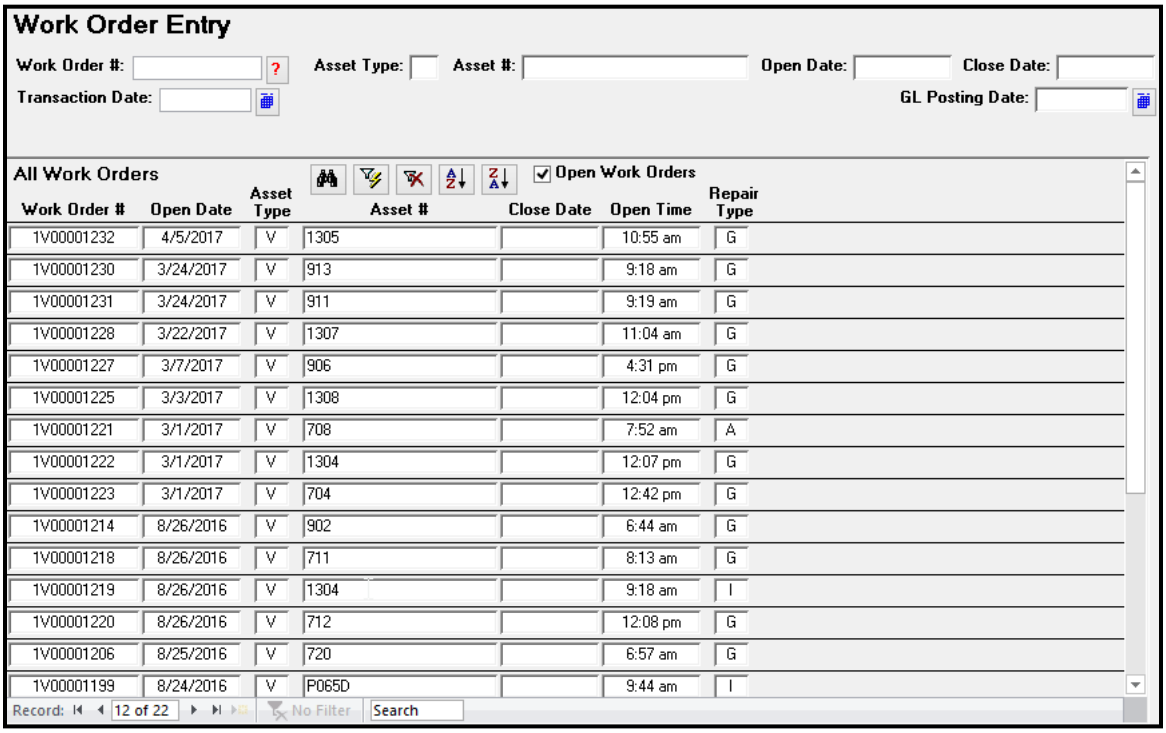
*Work Orders now has a **RESTRICTED** entry work order feature. See WO Restricted Entry section of this user guide for complete explanation and instructions.*

As mentioned above, when work orders are processed, inventory parts will be reduced; therefore, it is **imperative** that as PO Inventory Items are received, they are **entered and updated daily**.

The following screen shot below is an example of a work order. Work Order # **1V**00001232 is the next sequential number for the Main Garage (Location **1**) and **V**ehicle (Asset Type) as set up via Work Order Control.



To display an existing work order, type the number in the **Work Order #** field, or click the red question mark. When red question mark is used, the following sub form displays. This sub form allows selection of only Open Work Orders when the **Open Work Orders** checkbox is selected.

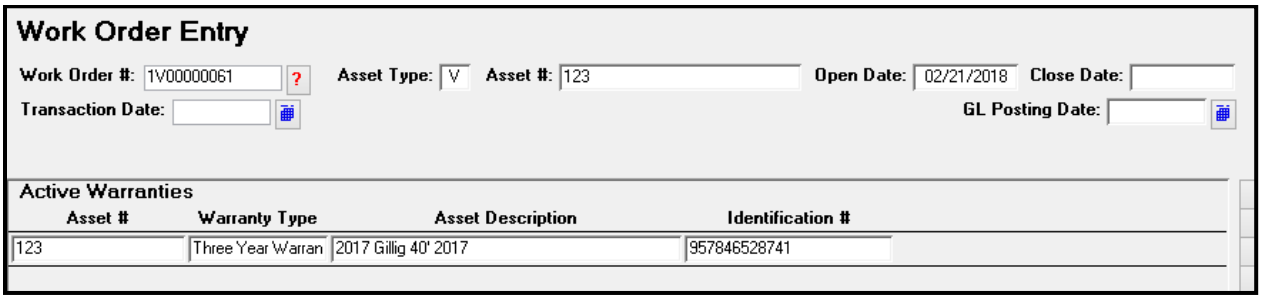


The sub form allows selection of work orders by filtering, sorting (ascending or descending), or using the find feature (binoculars). The filter options can be used in the following fields: Work Order #, Open Date, Asset Type, Asset #, Close Date, and Repair Type.

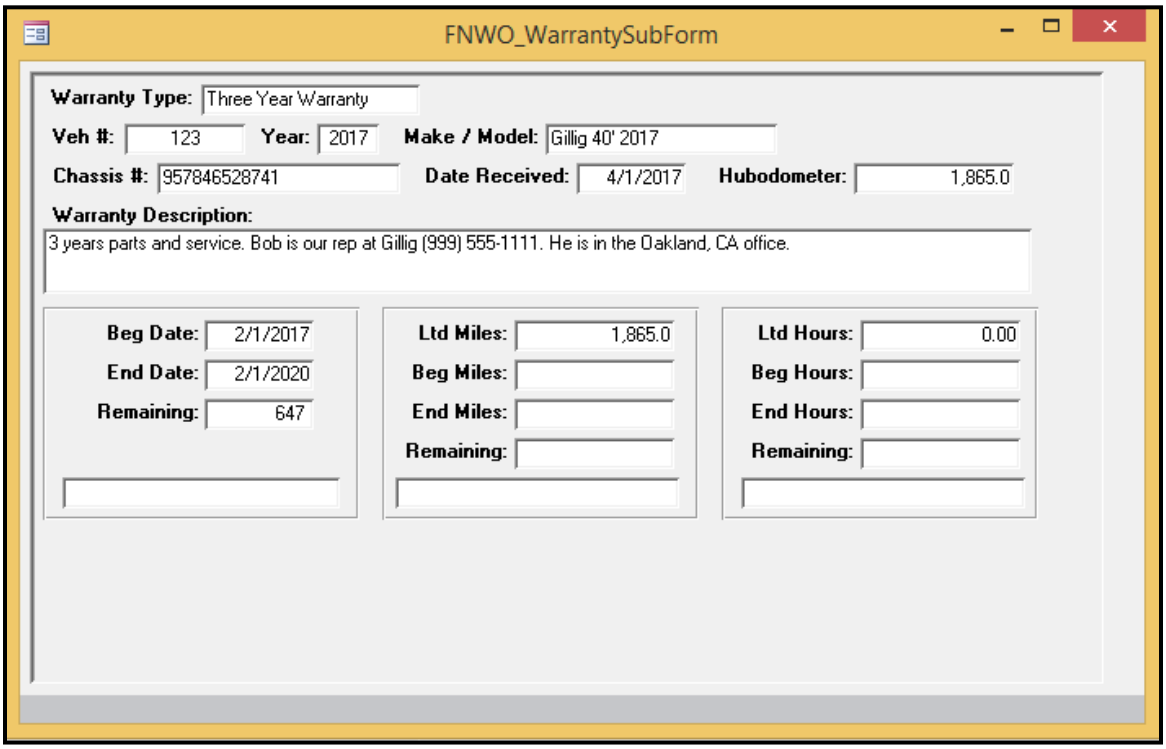
Double-click on the Work Order # to select. The Work Order Entry form will be populated with the work order selected.

Once a work order is selected, the active Vehicle or Component Warranty information is automatically displayed. This window is to alert you of any active Warranties that may apply to this vehicle or component.

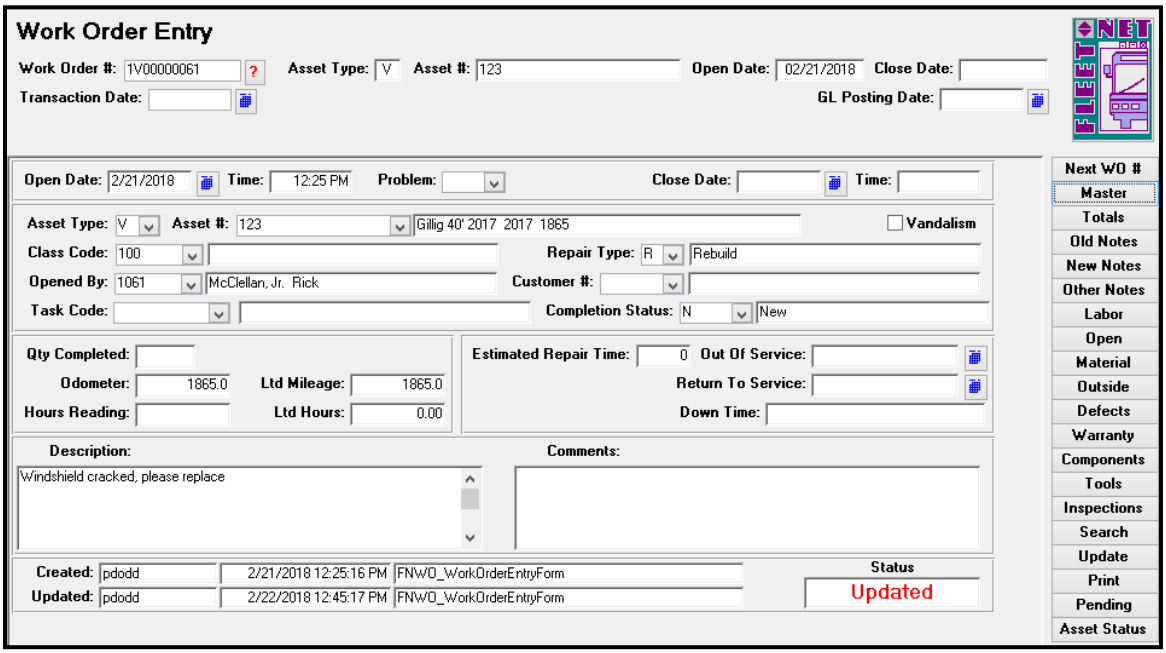
If a Warranty information form does not display then either, there is no warranty set up for this vehicle or component or the warranty has expired. For more information on warranties, refer to the warranty section of this manual.



Double click on each of the Active Warranty Asset # to display the warranty details.



Use the following figure and table for descriptions of each field on the Work Order Entry form.



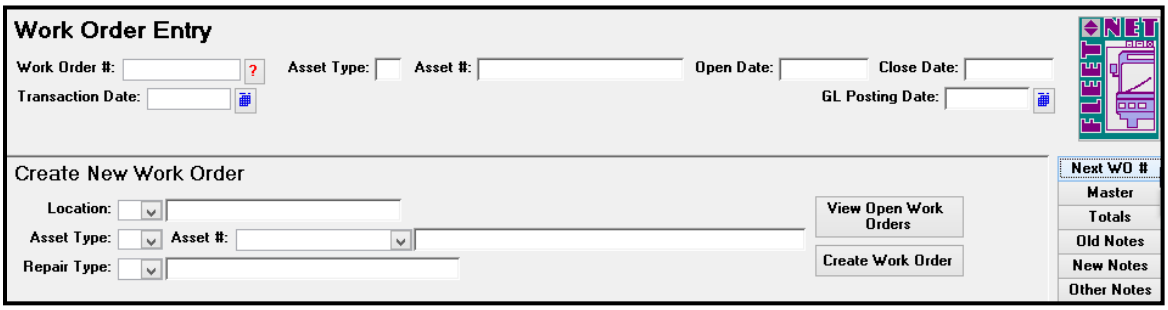
Field	Description
Work Order #	Automatically generated when new work orders are created. An existing work order # can also be entered.
Open Date, Asset Type, Asset # and Close Date	Automatically populated by entries made to the work order sub form
Transaction Date	This field will auto populate with the current date. Select the date via the calendar feature when entering new Labor, Material, Component, or Outside transactions for an existing work order.
GL Posting Date	This is required when updating a single work order or when doing a batch update of all Pending work orders. Use the calendar feature to make a quick entry or manually enter a date. The date entered will be the general ledger journal entries posting date. Contact accounting personnel to determine appropriate date so that transactions are posted to the proper period.
Open Date	Select the work order open date via the calendar feature. The default is the current date.
Time	Automatically populated with current time when work order is generated
Problem	This field is automatically populated when a work order is generated via Road Call entry in the Vehicle Problems module. For work orders not generated via Vehicle Problems, enter or select from the drop-down list a problem code, if desired.
Close Date and Time	Select the work order Close Date via the calendar feature. The current time will automatically populate; however this can be over written if necessary. Inventory and vehicle master will be updated whether a work order is open or closed. *The following procedures are controlled by the WO Close Date: Reset Inspections; Inventory Rebuilds; and Vehicle Problems.*
Asset Type	Select the type (as setup via **Miscellaneous List**). This selection is to ensure the proper Asset # listing is used when selecting and assigning an asset to the work order. 
Asset #	Select the asset number that corresponds to the Asset Type selected for which the work is performed. The description will automatically populate. For Example: Asset Type "**V**" will display vehicles as setup via **'Modify/Add Vehicles'**. Asset Type "**C**" will display **'Components'** Asset Type "**I**" will display parts from "**Inventory Master**" Asset Type "**O**" for **Other**; user defined and will be blank in the Asset # drop-down list. Other codes can be used for Asset Types set up in the Asset Management form and will display the list that corresponds to the selected code
Vandalism	Click the checkbox if the repair is due to vandalism.
Class Code	Select the applicable class code setup via **'Modify/Add Class Codes'**. The Class Code selected determines which GL journal entries are generated for material, labor, billing, and outside services. Inspections will roll over to next inspection due based on setup of class code selected.

Field	Description
Repair Type	Identify the type of repair which will assist in tracking maintenance on assets. Select the repair type applicable to work being performed. **A = Accident** **B = Building and Grounds** – for facilities maintenance **C = Campaign Maintenance** – can be used to track recalls on parts, seasonal work assignments etc. **D = Defect** – automatically populated when Vehicle Problems safety defect is generated **E = Equipment Repair** – can be used to track repairs on equipment not listed in vehicle master or components **G = General Vehicle Repair** – can be used for non-specific repairs **I = Inspection** - must be used for vehicle and component inspections. When work orders are generated via PM Checklist, this repair type is automatically populated, and the inspection is assigned. The repair type ***SHOULD NOT*** be changed. User should **NOT** create Inspection work orders on this screen. **M = Mechanical Road Call** – automatically populated when work orders are generated via Vehicle Problems Road Call Entry and will update failures in vehicle history. **O = Other Road Call** – automatically populated when work orders are generated via Vehicle Problems Road Call Entry for non-mechanical road calls. These work orders do not count as failures. **R = Rebuild** – used for component and inventory rebuilds **S = Service Lane** – used to track labor for service lane **T = Tire Change** – used for tire change work orders. This repair type must be used to print positions on the work order. **U = Unclassified Labor** – used to track other types of labor such as cleaning **W = Warranty Repair** – used to track warranty repairs on vehicles and components **X = Re-work** – used to indicate previous repairs where not completed or incorrect
Opened By	Select the employee number of the person generating the work order.
Customer #	Select the customer number, if applicable. This is only used if your shop brings in work for an outside source. The Customer # is setup in Accounts Receivable. Use this field if tracking billing markups defined in Class Codes.
Task Code	Select the task code from the drop-down list (setup via **Modify/Add Tasks**). The task code is used to calculate the estimated costs based on the material and operation code assigned to the task. (Optional)
Completion Status	Select the completion status from the drop-down list.
Qty Completed	Use this field to indicate quantity of finished goods on inventory rebuild work orders. See Work Order Repair Types section in this manual for more information.
Odometer	Automatically populated based on hub reading in vehicle master at the time the work order is generated. This can be modified, if necessary.
Hours Reading	Automatically populated based on hours reading in vehicle master at the time the work order is generated. This can be modified, if necessary.
LTD Mileage	Automatically populated from the accumulated actual mileage updated from Daily Service or entered in the Vehicle History Maintain Totals on the Vehicle Master form
LTD Hours	Automatically populated from the accumulated actual hours updated from Daily Service or entered in the Vehicle History Maintain Totals on the Vehicle Master form
Estimated Repair Time	This field is populated manually to show how long the repair is expected to take. This will reflect in the Work Order Status screen

Field	Description
Out Of Service	This field is automatically populated from Vehicle Problems Vehicle Status entry when a work order is generated via Road Call Entry. For work orders not generated via Vehicle Problems, enter an Out of Service date by clicking on the calendar feature. This defaults to the current date and time but can be modified, if necessary. This will not update Vehicle Status or Vehicle Master. It is informational only on the Work Order.
Return To Service	Enter or select a date by clicking on the calendar feature. This defaults to the current date and time but can be modified, if necessary.
Down Time	The asset down time is automatically calculated based on the Out of Service and Return to Service dates.
Description	This field is automatically populated via Vehicle Problems Road Call Entry Comments field and via PM Checklist with inspection description. However, a description of the work to be performed can be entered for manually generated work orders (up to 255 alphanumeric characters).
Comments	Mechanics comments regarding the work performed can be entered (up to 255 alphanumeric characters). If necessary, additional comments can be added via Notes.

Next WO

To generate a new work order, click ***Next WO #***



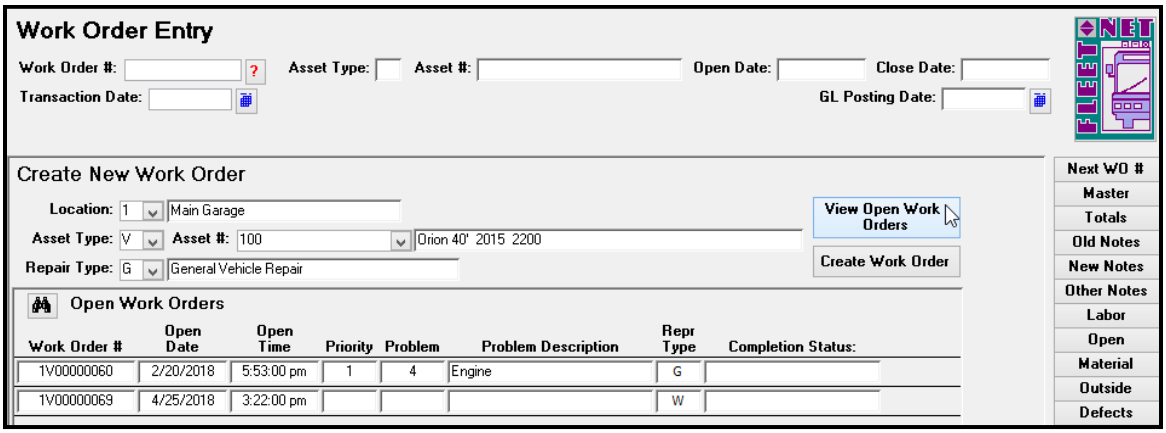
Select a Location and Asset Type (this determines the first and second characters of the work order number) from the drop-down lists at the top of the form.

Field	Description
Location	(i.e., Main Garage, Road, Buildings & Grounds, etc.) This is the first character in the work order number.
Asset Type	Select the type (as setup via **Miscellaneous List**). This selection is to ensure the proper Asset # listing is used when selecting and assigning an asset to the work order. This is also the second character or the WO number. Asset Type: C Components I Inventory O Other S Shop Equipment V Vehicle
Asset #	Select the asset number that corresponds to the Asset Type selected for which the work is performed. The description will automatically populate. For Example: Asset Type "V" will display vehicles as setup via 'Modify/Add Vehicles'. Asset Type "C" will display 'Components' Asset Type "I" will display parts from "Inventory Master" Asset Type "O" for Other user defined and will be blank in the Asset # drop-down list. Other codes can be used for Asset Types set up in the Asset Management form and will display the list that corresponds to the selected code

Work Order Entry…. continued

Field	Description
Repair Type	Identify the type of repair which will assist in tracking maintenance on assets. Select the repair type applicable to work being performed. **A = Accident** – can be used for linking to Claims and Safety module **B = Building and Grounds** – can be used for facilities maintenance **C = Campaign Maintenance** – can be used to track recalls on parts, seasonal work assignments etc. **D = Defect** – automatically populated when Vehicle Problems safety defect is generated **E = Equipment Repair** – can be used to track repairs on equipment not listed in vehicle master or components **G = General Vehicle Repair** – can be used for non-specific repairs **I = Inspection** - must be used for vehicle and component inspections. When work orders are generated via PM Checklist, this repair type is automatically populated and the inspection is assigned. The repair type ***SHOULD NOT*** be changed. Inspection work orders must **NOT** be generated here. **M = Mechanical Road Call** – automatically populated when work orders are generated via Vehicle Problems Road Call Entry and will update failures in vehicle history. **O = Other Road Call** – automatically populated when work orders are generated via Vehicle Problems Road Call Entry for non-mechanical road calls. These work orders do not count as failures. **R = Rebuild** – used for component and inventory rebuilds **S = Service Lane** – used to track labor for service lane **T = Tire Change** – used for tire change work orders. This repair type must be used to print positions on the work order. **U = Unclassified Labor** – used to track other types of labor such as cleaning **W = Warranty Repair** – used to track warranty repairs on vehicles and components X = Re-work **– used to indicate previous repairs where not completed or incorrect**

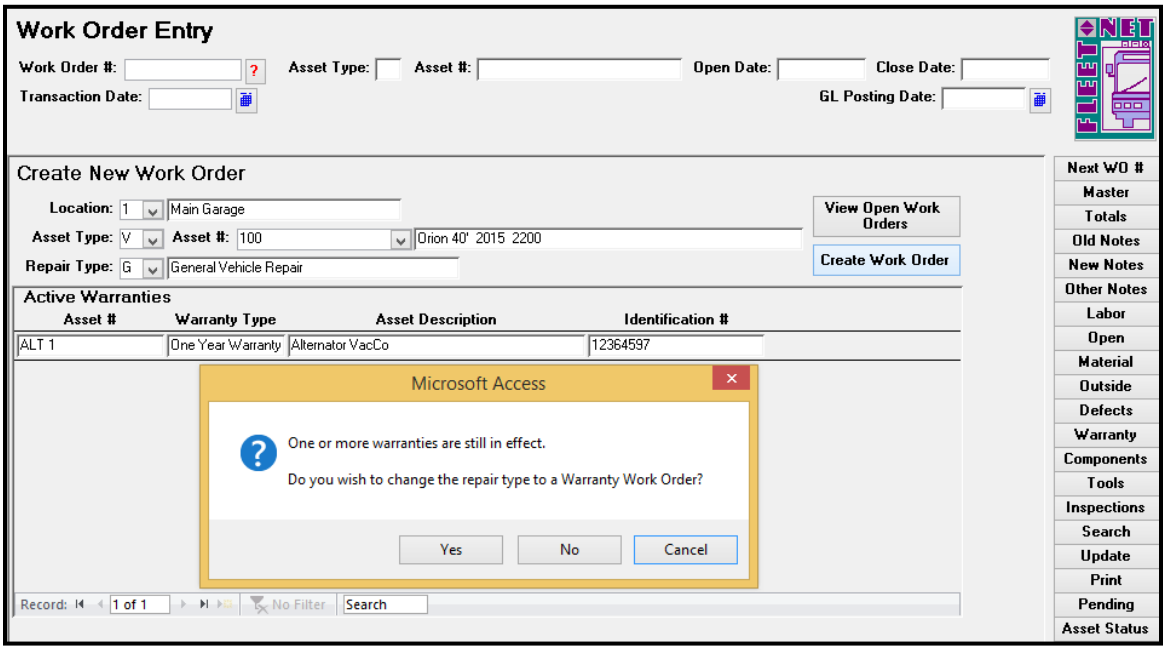
Click ***View Open Work Orders*** to display a list of all work orders for the selected Asset #



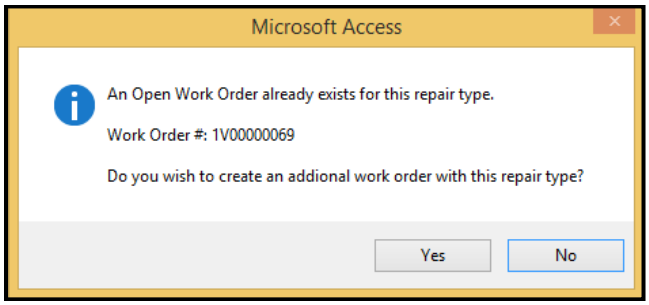
If an open work order exists, double click the WorkOrder # and click ***Master*** to display it.

Click ***Create Work Order*** to generate a new work order

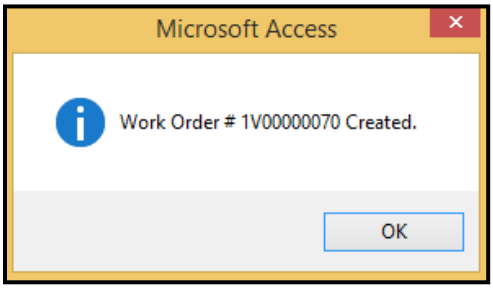
If warranties are in effect the following message displays to allow changing the Repair Type.
Click ***Yes*** to automatically change the Repair Type.
Click ***No*** to continue with the selected Repair Type and create work order.



If an Open Work Order exists the following message displays, allowing creation of a new work order with the same repair type.



A confirmation message displays with the new workorder #.



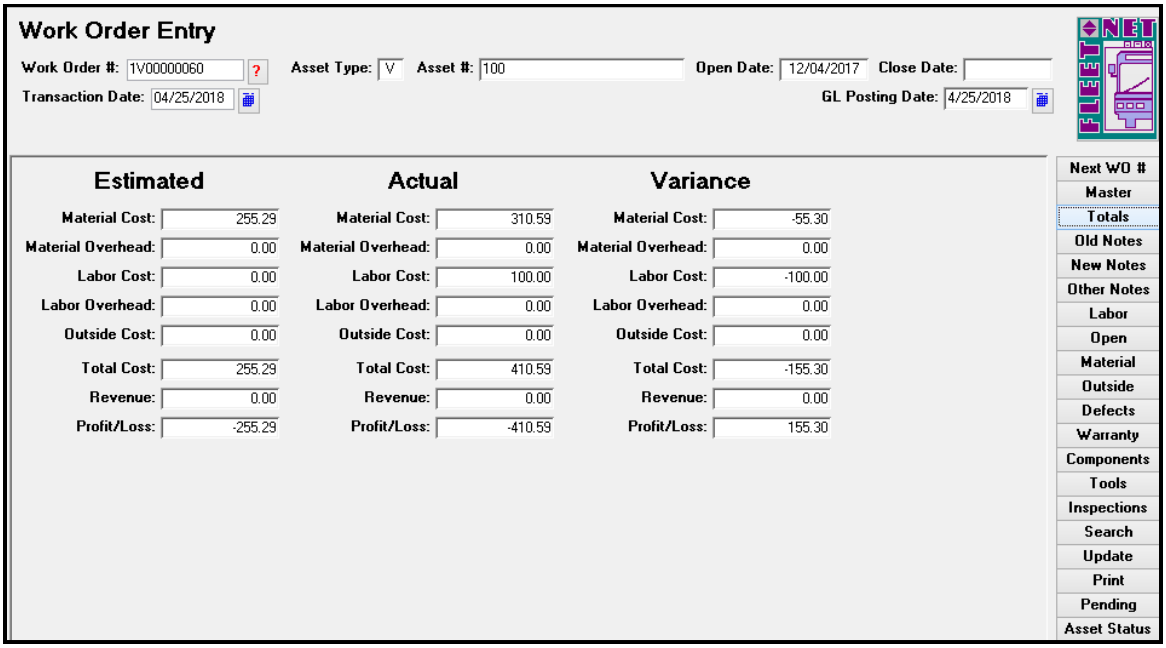
Complete the Work Order Entry form based on type of work order. Asset Type, Asset #, Class Code, and Repair Type are all required fields. Refer to the preceding table for an explanation of each field.

Master

Select ***Master*** to return to the master work order form. For example, when Labor entries are completed, click ***Master*** to return to the master screen.

Totals

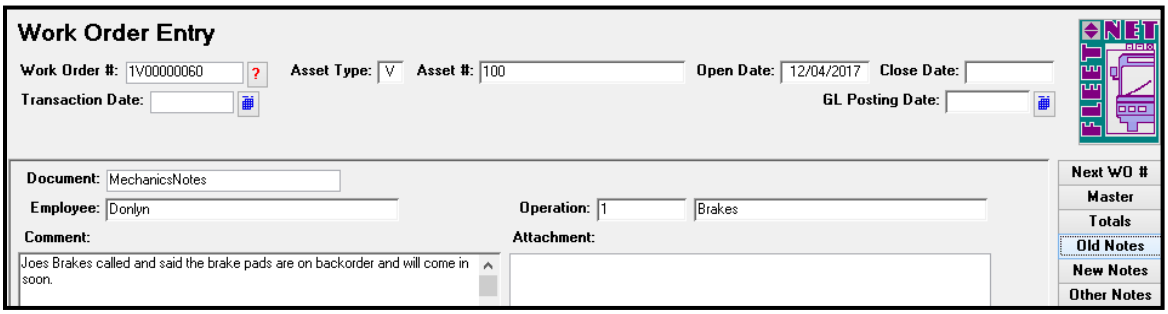
Select ***Totals*** to display the total Actual costs for the selected work order. When Tasks are setup, the estimated costs will also display. A comparison of the estimated costs to the Actual costs is calculated and displays in the Variance costs.



Field	Description
Estimated	Costs are automatically calculated based on the labor operations code and material setup in **Modify/Add Task** codes for the task assigned to the Work Order.
Actual	Costs are automatically calculated based on the Labor and Material transactions entered on the Work Order.
Variance	Automatically calculates and displays the variance between Estimated and Actual costs.

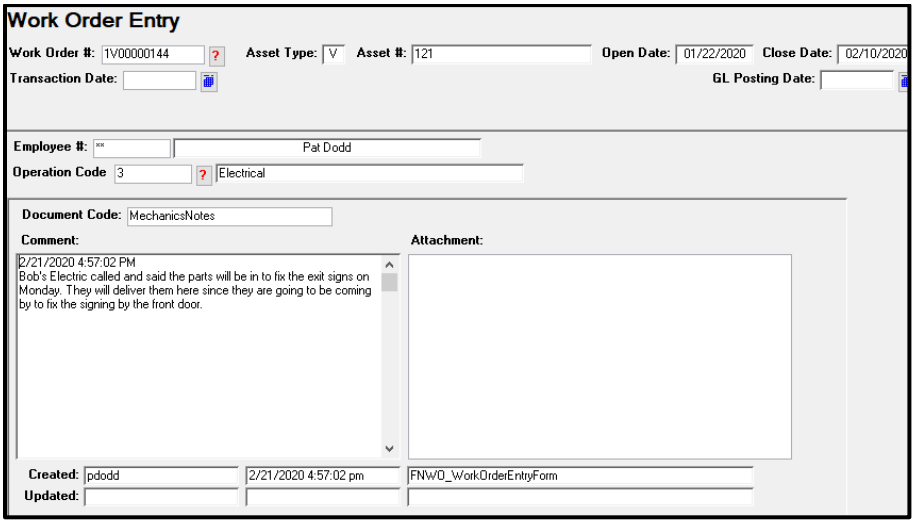
Old Notes

Old Notes allows viewing of notes entered by all users – these notes cannot be modified.



New Notes

Select ***New Notes*** to add new notes and attachments pertaining to the selected work order.
An Employee can delete, modify, or add to New Notes for the same Work order, Operation Code that they have created. Notes created by another employee cannot be changed.



It is required that the employee is setup in Employee Maintenance (SEC Menu) with a PIN. They will need to enter their employee number and PIN to get into New Notes.

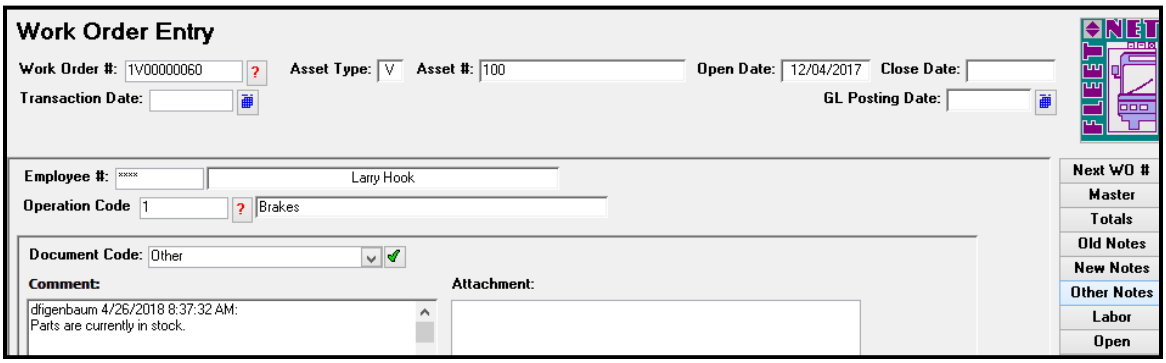
Field	Max Field Size	Field Type	Description
Operation Code			Enter the Operation Code or select via the red question mark Option to select by the code or description
Document Code	25	Alpha Numeric	Automatically populated with Mechanic Notes
Comment		Memo	Enter a comment pertinent to the work order and Operation Code. Comments are date and time stamped.
Attachment		OLE Object	Right-click, Insert Object, Create a File, Browse, select Link and Display as Icon to insert a document or object relating to WO. ***For more details see attaching documents instructions on following pages.)***

Other Notes

Use this feature to create notes for a document code other than “Mechanics Notes”
An Employee can delete, modify or add to New Notes for the same Work order, Operation Code that they have created. Notes created by another employee cannot be changed.

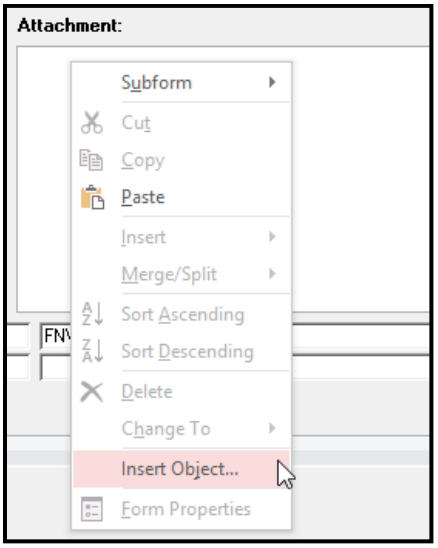
Select ***Other Notes*** to add new notes and attachments pertaining to the selected work order.

It is required that the employee is setup in Employee Maintenance (SEC Menu) with a PIN
When they have entered their employee number and PIN, they will see the following screen.

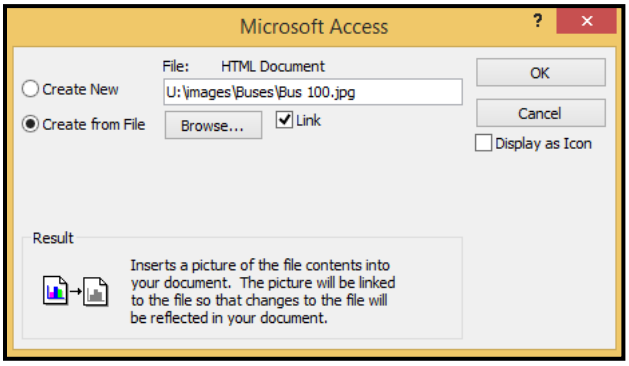


Field	Max Field Size	Field Type	Description
Operation Code			Enter the Operation Code or select via the red question mark Option to select by the code or description
Document Code	25	Alpha Numeric	Select the document code from the drop-down list that best describes the type of note to be added **New codes** can be created by selecting the icon. Attachments insert the contents of the file as an object so it may be activated in the application in which it was created.
Comment		Memo	Enter a comment pertinent to the work order. **New** comments are username, date and time stamped.
Attachment		OLE Object	Right-click, Insert Object, Create a File, Browse, select Link and Display as Icon to insert a document or object relating to WO. Attachment in above screen shot is (generated in Employee Assignments) a .gif image. Attachments can be deleted or added to either new or old notes. ***(For more details see the following pages.)***

To insert an **Attachment**, right click in the **'Attachment'** field, select **Insert Object**.

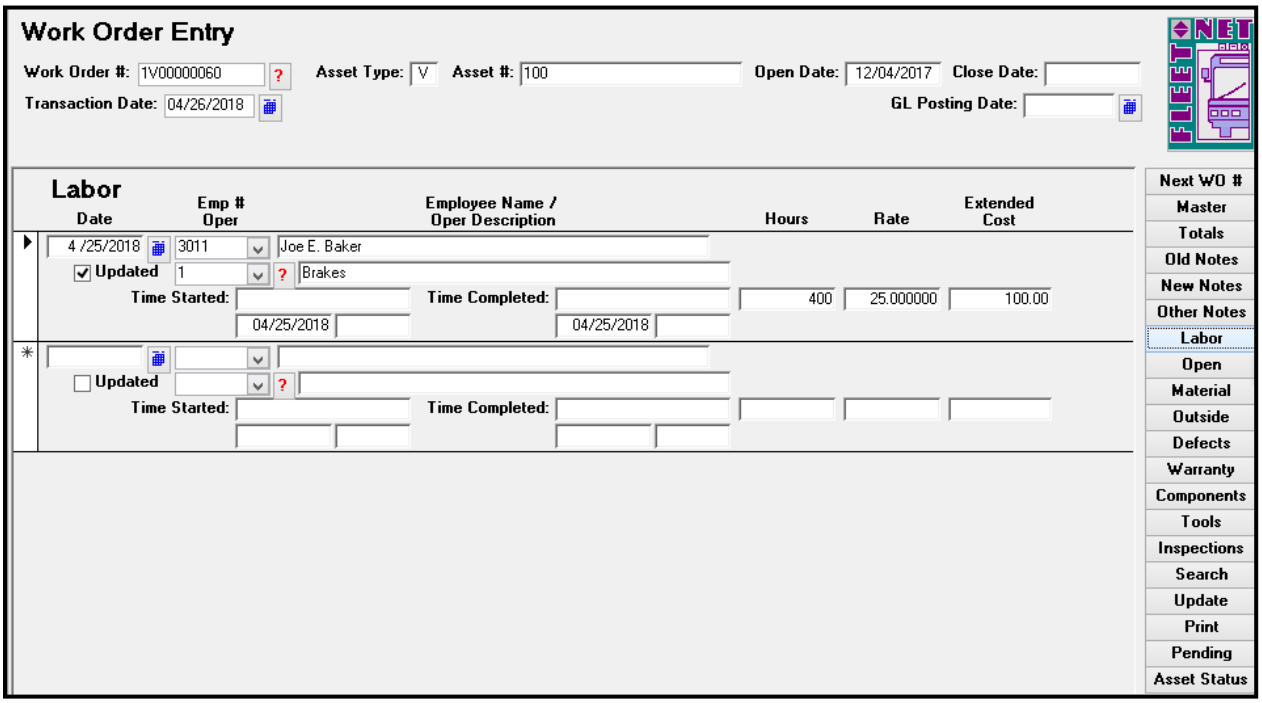


Select ***Create from File***
Select ***Browse*** and navigate in the *Look In* field to file location (file can be pdf, tiff, jpeg, gif, Word, Excel, etc.).
Select the file or image and click **OK**
Click **Link** checkbox
Click **Display as Icon** (displays the file type in icon format)
Click ***OK***



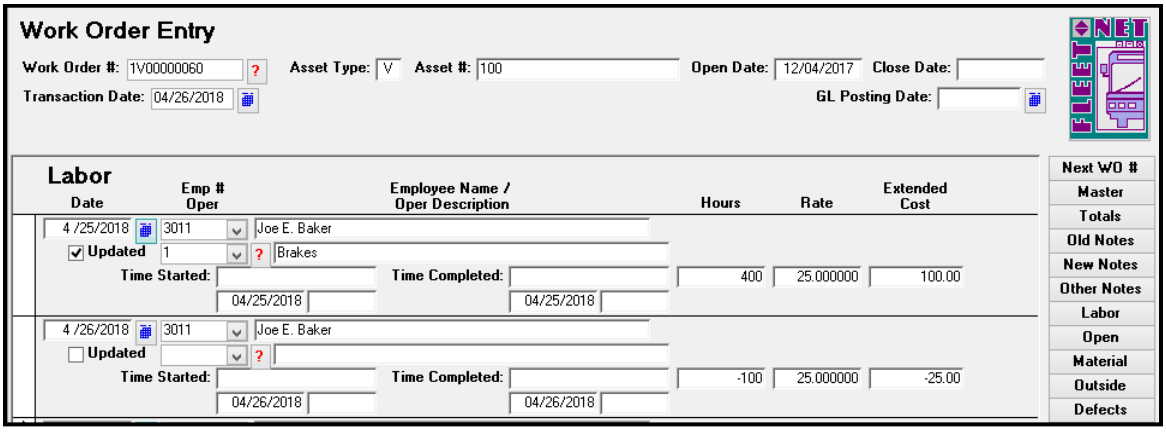
Labor

Select ***Labor*** to enter transactions. Enter labor time transactions for all operations performed on the work order. Labor transactions can also be automatically populated from either Employee Assignments and/or bar code units.



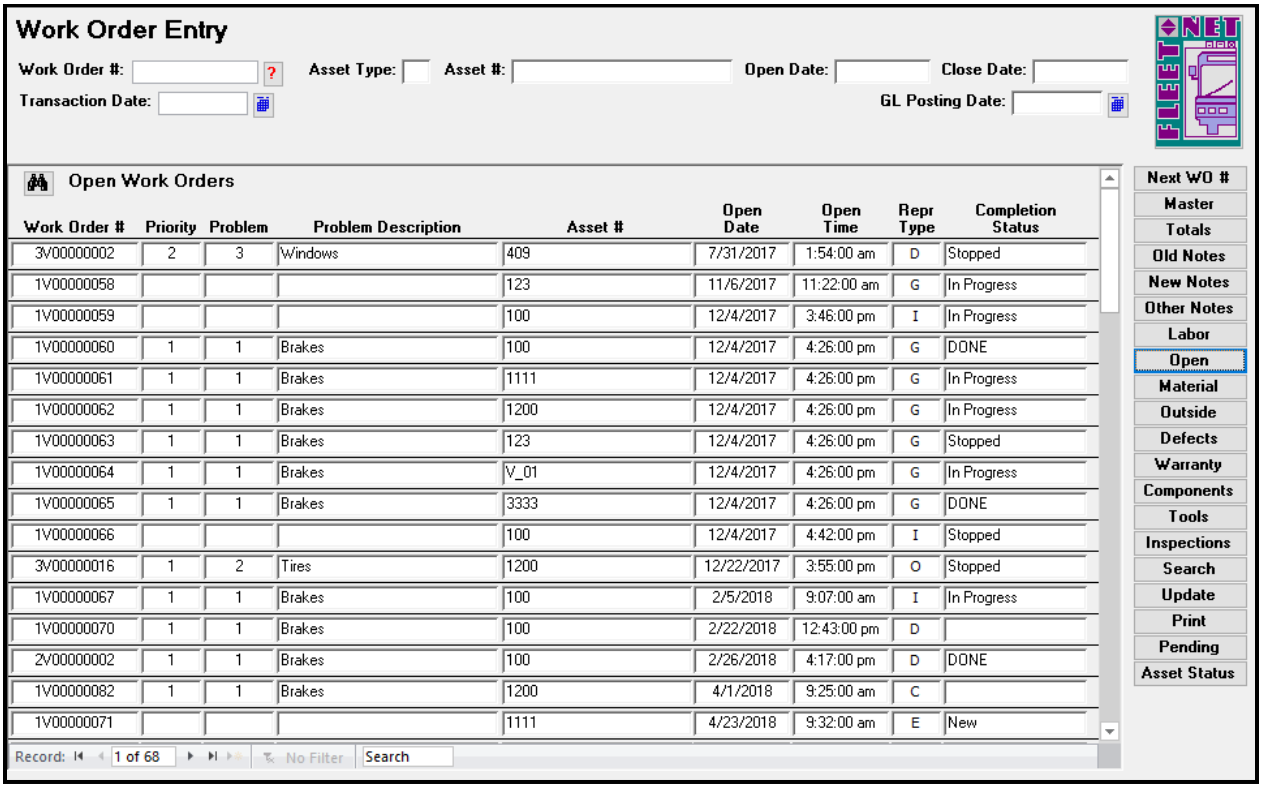
Field	Description
Date	Enter date **OR** automatically defaults to transaction date on work order master form when Emp # is entered or selected from drop-down list. Calendar feature can also be used (defaults to current date).
Emp #	Enter or select the employee number (employee completing the labor) from the drop-down list. The Employee Name will display when number is entered or selected.
Operation	Enter or select the labor Operation Code (specific to the labor to be completed) from the drop-down list. The Operation Description will display when the code is entered or selected.
Time Started/ Time Completed	*Optional field*: If time entered – Hours are calculated based on time entered for Started and Completed. (Enter time as 08:30 AM/PM) This field is automatically populated when either Employee Assignments and/or bar code unit is utilized.
Hours	Automatically calculated based on Started and Completed time entries. Automatically populated when either Employee Assignments and/or bar code unit is utilized. Enter manually if above two processes are not utilized. [Hours format is setup via Miscellaneous List, Control Record. H (Hours) or D (Decimal). Example: for one half hour, H enter 30 or D enter .5.
Rate	Automatically displays employee rate of pay - based on WO Employee Setup. Can also be manually entered or overwritten.
Extended Cost	Automatically calculates and displays based on Hours x Rate.
Updated	Checkmark in box indicates the record has been updated and cannot be changed. If checkbox is blank – the record has not yet been updated, changes are allowed.

Labor additions and/or removals are allowed on work orders that have been Closed and Updated. To remove or modify a Labor entry, enter as (-) negative hours. When these entries are updated, the associated costs to the asset will be reduced for the month based on transaction date entered.



Open

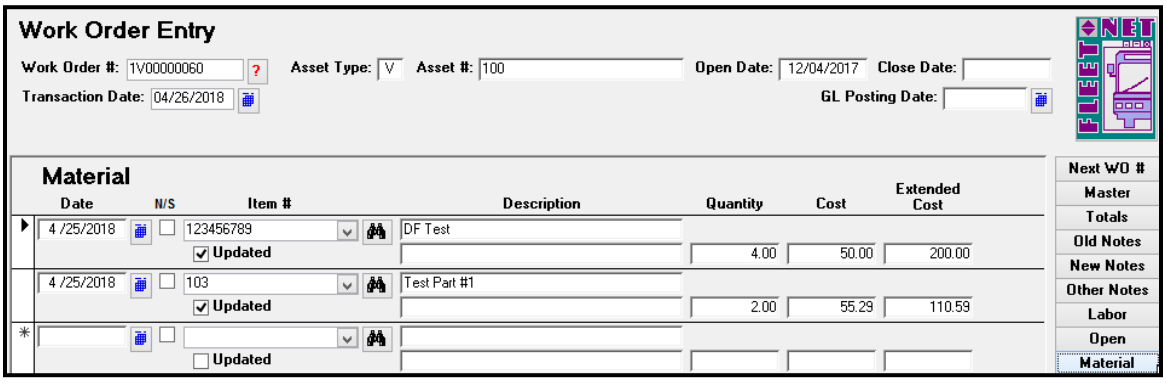
This form displays all current Open Work Orders.
Note: The Record bar in the lower left corner displays the total number of open work orders.



Double-click in the Work Order # field to open the Work Order Entry master form

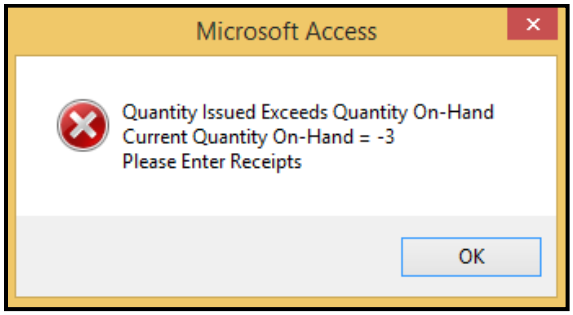
Material

Select ***Material*** to enter transactions. Enter transaction for all material items required to complete the work order. Nonstock items need to have the cost entered manually. Material transactions will be immediately transferred when bar code units are utilized. User number, Time, and Serial No. of unit are displayed in lower description field.



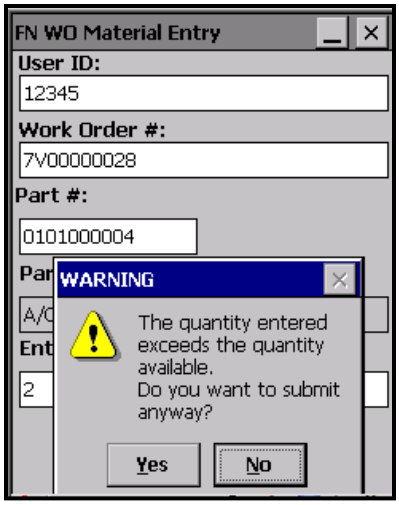
Field	Description
Date	Enter date OR automatically defaults to transaction date on work order master form when Item # is entered or selected from drop-down list. Calendar feature can also be used (defaults to current date).
Non-Stock	Select this checkbox **only** if item entered is not tracked in inventory. Examples of non-stock items are small parts such as bulbs, nuts & bolts, etc.
Item # Max 20 Alpha Numeric	Select the inventory item number from the drop-down list for item needed to complete this work order. The drop-down list shows Description, Cost, On Hand, Available, Committed and On Order. Quantities exceeding the quantity available cannot be added to the work order. A warning message will display.
Description Max 50 Alpha Numeric	Automatically displays inventory item description entered for item when setup in Inventory Master Maintenance. **Non-stock** items – enter description of item needed to complete this work order.
Quantity	Enter the quantity of item needed to complete this work order.
Cost	Automatically displays item cost based on Inventory Master Maintenance. **Non-stock** items – manually enter cost.
Extended Cost	Automatically calculates and displays extended cost based on Quantity x Cost.

If the quantity entered for the inventory item exceeds quantity On Hand in Inventory Master Maintenance, the following message will display:



A similar warning message will display when entering Material using the bar code unit and the On Hand quantity is exceeded. If the user has more parts than are in their inventory, they should notify their parts room/supervisor.

The following is the notice the user will get if using one of the bar code readers

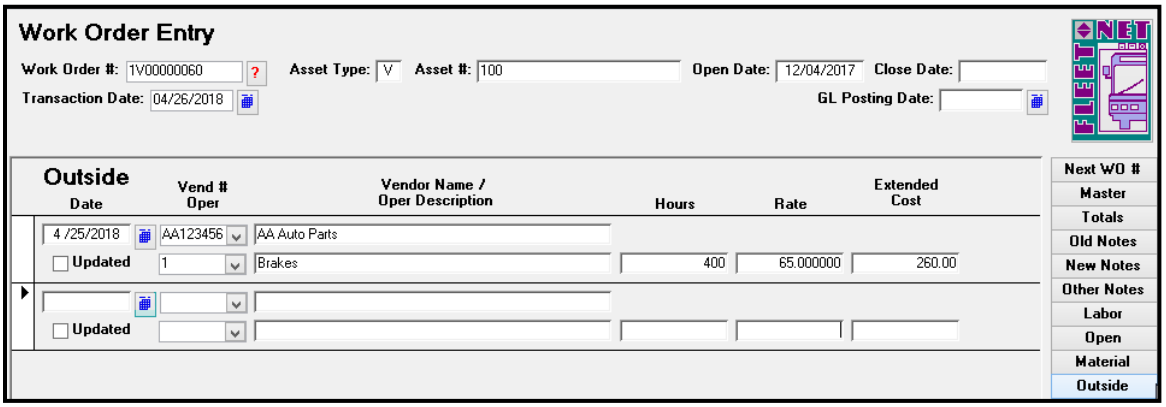


NOTE: **Materials entered immediately update the "Committed" field in Inventory Master Maintenance. Once the work order has been updated, the "Committed" and "On Hand" fields will be reduced (WO does not have to be closed to effect inventory).**

Material additions and/or removals are allowed on work orders that have been Closed and Updated. To enter a removal to Material, enter as a (-) negative quantity. When these entries are updated the associated costs to the asset will be reduced for the month based on transaction date entered. The inventory item quantity On Hand will be increased.

Outside

Select ***Outside*** to enter labor transactions or services. If work is sent off transit property to a vendor to make repairs, they are considered outside costs and can be entered here. Example: Radiator rebuild - the vendor drop-down list contains vendors previously setup in AP Modify/Add Vendors form.

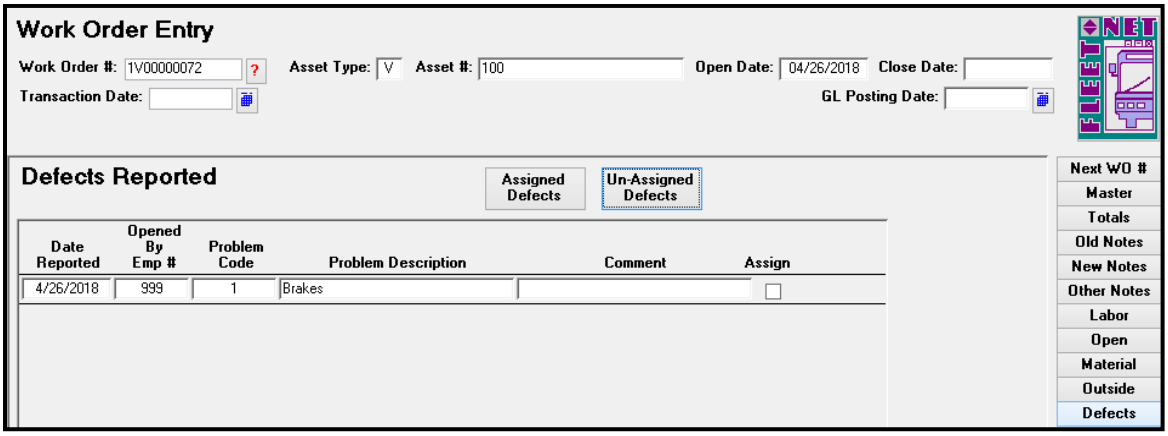


Field	Description
Date	Enter date **OR** automatically defaults to transaction date on work order master form when Vend # is entered or selected from drop-down list. Calendar feature can also be used (defaults to current date).
Vend #	Enter or select the vendor number the chargeable hours for which the outside costs that will be invoiced for this work order. Vendor must have been previously defined via Modify/Add Vendor Master (AP #2).

Operation	Enter or select the applicable Labor Operation Code. The description will display in the Operation Description field. If no operation code is selected a description can be manually entered in Operation Description field. Max 50 alpha Numeric
Hours	Enter the chargeable hours vendor has invoiced as an outside cost attributed to this asset. The format for Time Entry is setup via Work Order Miscellaneous List, Control Record**,** and Time Entry. H (Hours) or D (Decimal) Example: for one half hour, H enter 30 or D enter .5 Total parts and labor can be entered using the Hours field.
Rate	Enter the rate invoiced.
Extended Cost	Automatically calculates and displays extended cost based on Hours x Rate.

Defects

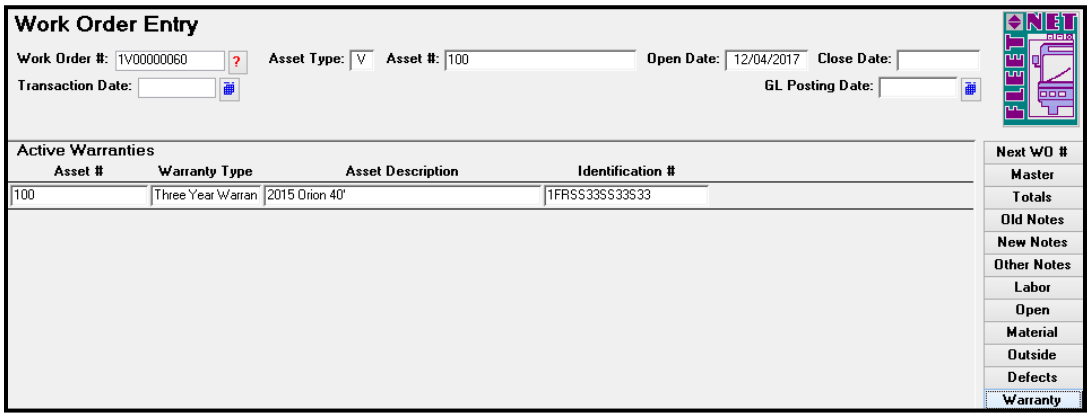
Click ***Defects*** to display and assign to a Work Order any Un-Assigned defects reported via Vehicle Problems from the dispatch department as Deferred Defect Entries.



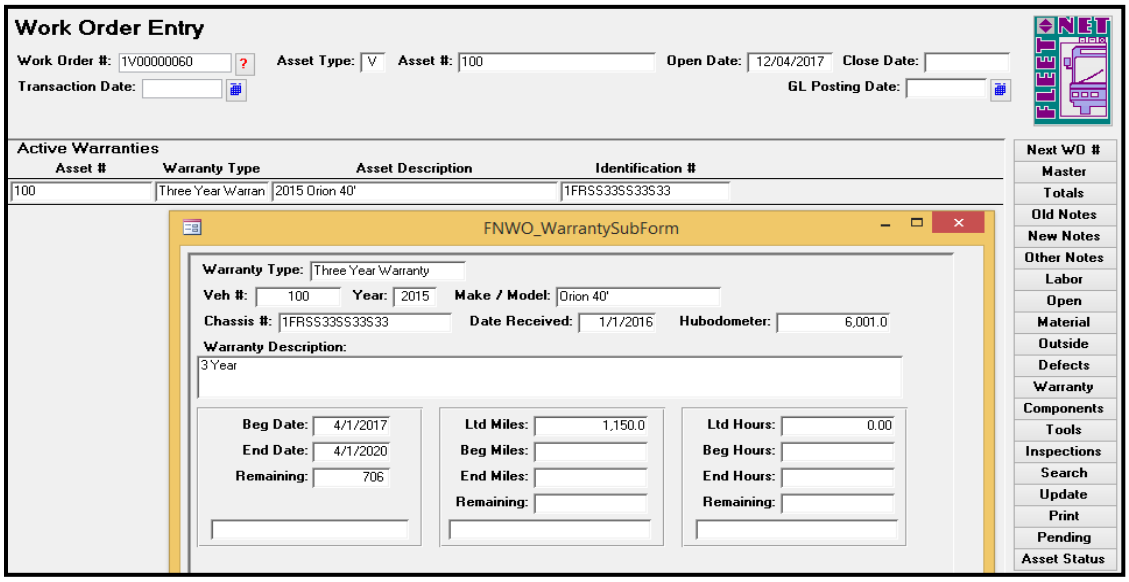
Button/Field	Description
Assigned Defects	Click to display deferred defects reported for the vehicle that have been assigned to this work order. When generating Work orders via PM Checklist, and the Include Defects checkbox is selected, the defect is assigned to the inspection work order and will be marked as repaired when the work order is **Closed** and **Updated**. If the deferred defect will not be repaired on the assigned work order, uncheck the Assign checkbox so that it can be assigned to a subsequent work order.
Un-Assigned Defects	Click to display deferred defects reported for the vehicle, which are not yet assigned to any work order. Check the Assign checkbox to assign each defect to the current work order. The data is populated from **Deferred Defect Entry** in **Vehicle Problems**.
Assign	When checked, the defect is assigned to the work order. Before the work order is Closed and Updated verify that all assigned defects have been repaired.

Warranty

Click ***Warranty*** to display the warranty list for the asset #. No changes to the warranties can be made via this form. All warranty information is setup in Vehicle Maintenance module.

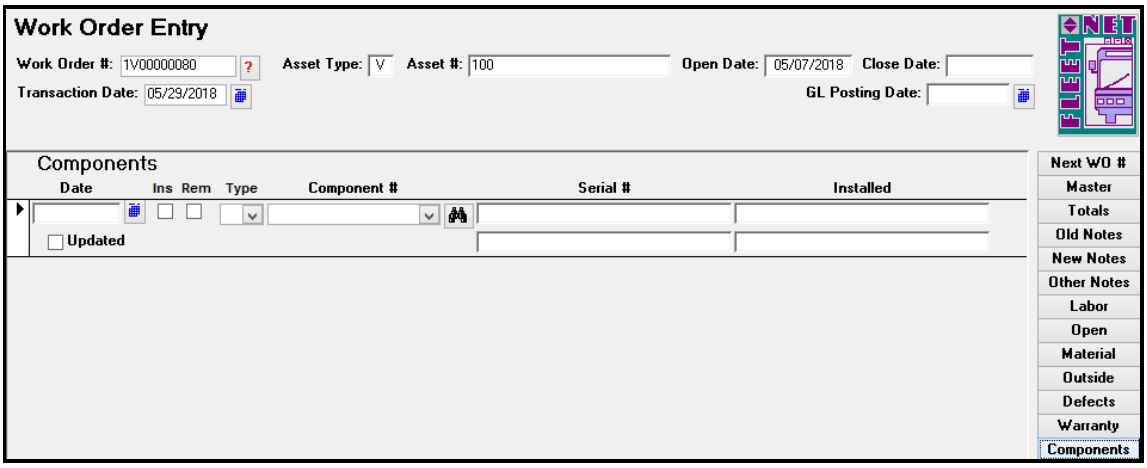


Doubleclick the Asset # to display warranty information.



Components

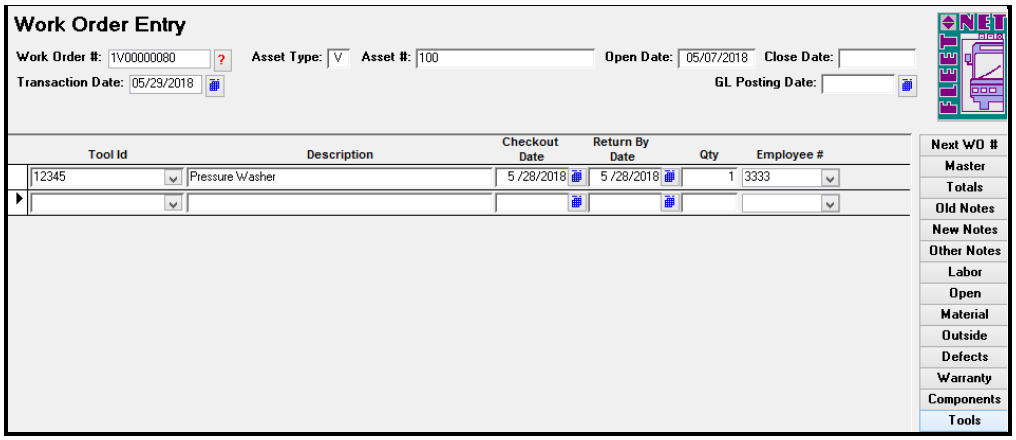
Select to install or remove components on a vehicle. Enter as many transactions as necessary to detail the work performed.



Field	Description
Date	Enter date **OR** automatically defaults to transaction date on work order master form when Component # is entered or selected from drop-down list. Calendar feature can also be used (defaults to current date).
Component #	Select the component number from the drop-down list that will be installed or removed from the vehicle.
Install	Select the checkbox if this component is being installed. **'Install'** will display in the field to the right.
Removed	Select the checkbox if the component is being removed. **'Remove'** will display in the field to the right.
Serial #	Automatically populated from **Modify/Add Components**.
Installed	The component description is automatically populated from **Modify/Add Components**. Once the work order is Updated, the asset #, Date, and WO # will display in the field.

Tools

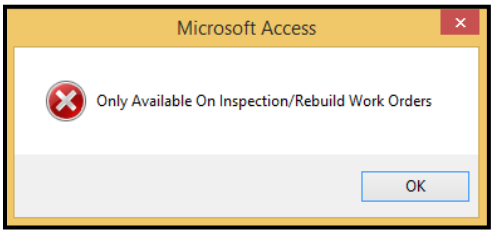
On the Work Order Entry form click ***Tool*** to check out tools.
The Tool Inventory form will be populated with this data



Field	Description
Tool Id#	Select the tool id from the drop-down list
Check Out Date	Enter the date the tool has been taken from stock
Return By Date	Enter the date the tool will be returned to stock
Qty	Enter the number of this tool
Employee #	Enter the employee number that is using the tool

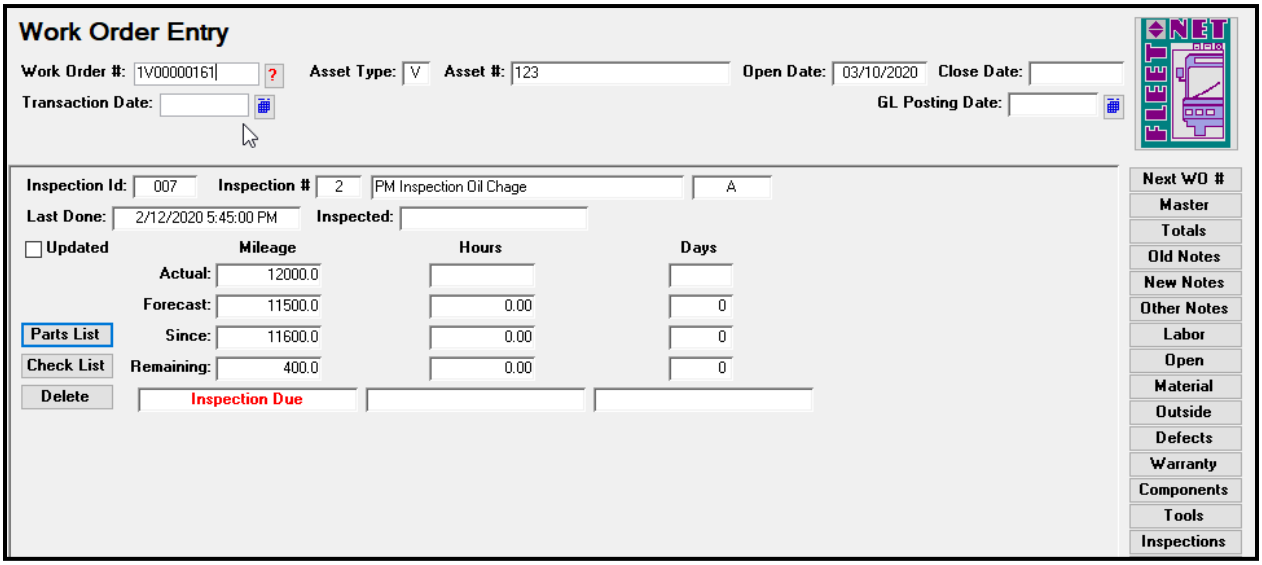
Inspections

Select to display the assigned inspection on the selected work order for the specific asset. If the Repair Type is not I or R, a warning message will display.

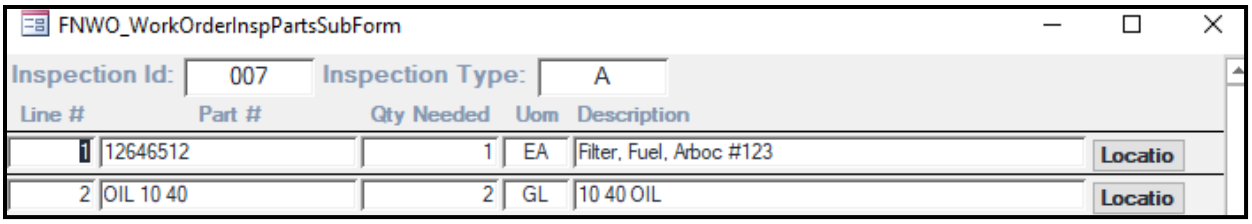


Inspection work orders should only be created through the PM Checklist in Vehicle Maintenance.

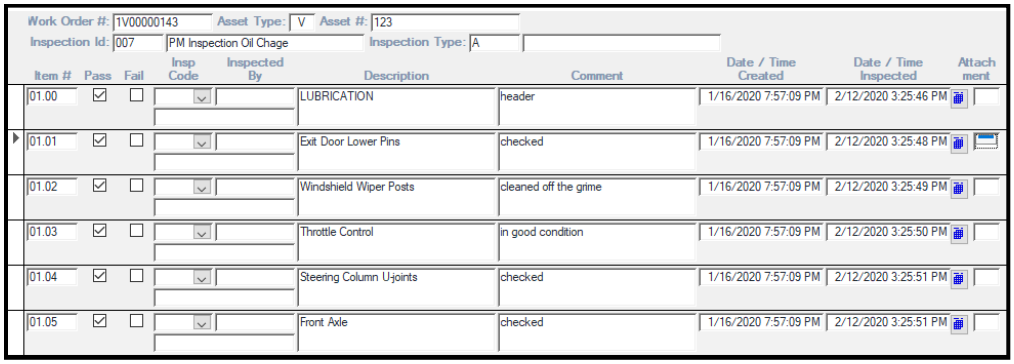
If the current work order is an Inspection work order, clicking ***Inspection*** will bring up the screen below.



The user can access the Parts List by clicking on ***Parts List.*** If a parts list was created in the Inspection Master, it will appear as seen below. This is informational only, as not all parts are needed on every inspection. The Location button will display the Warehouse and Bin Number of the part. If no Parts List has been created, user will get a message “No Parts List Found”.



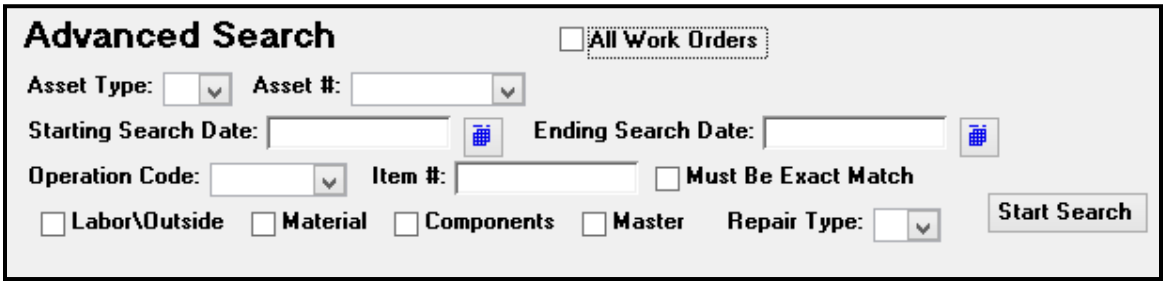
The user can access the checklist items for this inspection by clicking on ***Check List***. Pass or Fail must be chosen for each item.



Field	Description
Item #	Populated from the Checklist Items set up in Inspection Planning menu
Pass Fail	Once user clicks onto a line item, they must choose Pass or Fail
Insp Code	These codes must be entered in the Miscellaneous Code setup in WO01, Option #2. These are user defined. *Optional*
Inspected By	Tech can enter their name or employee number here. *Optional*
Description	Populated from the Checklist Items set up in Inspection Planning menu
Comment	User can type in a note in this box. Double click in this field to bring up a larger screen to type in or to read the existing note. *Optional*
Date/Time Created	Date the inspection work order was created
Date/Time Inspected	Click the blue calendar symbol to note when the item was completed. *Optional*
Attachment	Populated from the Checklist Items set up in Inspection Planning menu, if applicable

Search

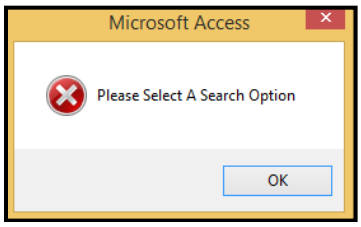
Select to search work order history based on the criteria specified such as Repair Type, Date range, Operation Code, etc. Selecting more criteria narrows the search results. To view a particular work order and access other work order entry information, double-click the Work Order #. The search form remains displayed to toggle and select other work orders.



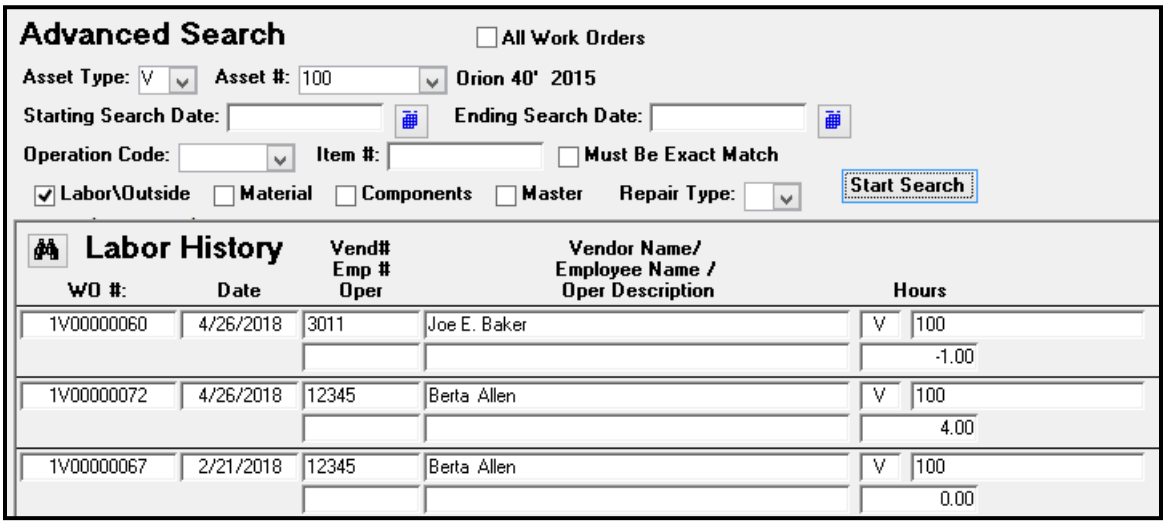
Field	Description
Asset Type	Select the asset type. Leave blank to search all.
Asset #	Select the asset number, if applicable. Leave blank to search all.
Starting / Ending Search Date	Select the date range for the search. Leave blank to search all.
Operation Code	Select the applicable operation code. Leave blank to search all.
Item #	Select an item number. Leave blank to search all items.
Must Be Exact Match	Select the checkbox to ensure that your search is an exact match to the item # you have selected. This could limit your search in some situations and if unsure of exactly what the item # is you are looking for, do not check this box.
Note: Only one of the (4) checkboxes below can be checked, and one must be checked for the search to complete. A sample of what each checkbox produces from the search results is below.	
Labor/Outside	Select checkbox to display labor entries by work order
Material	Select checkbox to display material by work order
Components	Select checkbox to display components by work order
Master	Select checkbox for the work order master form.
Repair Type	Select a repair type to narrow the search. For example if you're interested in looking only at inspections, select 'I' for inspections from the drop-down list. Leave blank to search all.

Select ***Start Search*** to activate the search and display the work orders based on the criteria you have selected

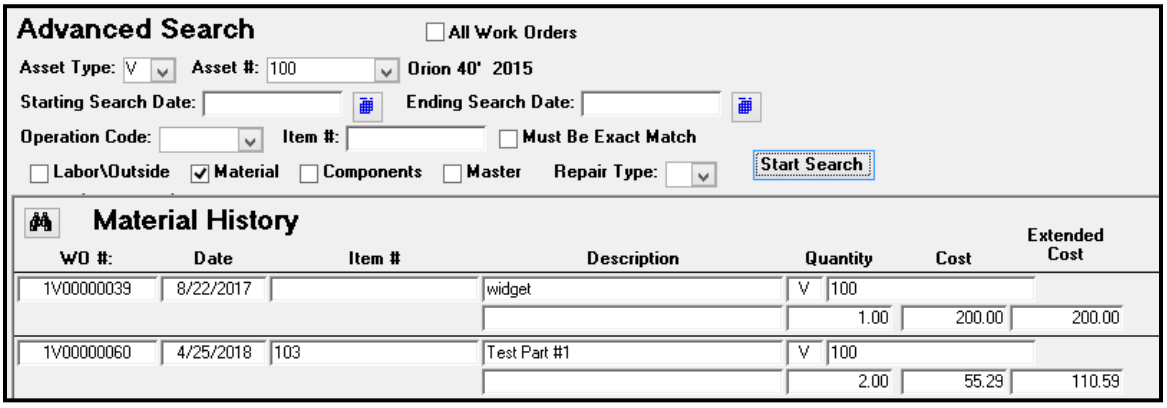
The following message display if ***one*** of the above selections required for the search is missing. For example, if one of the required checkboxes has not been checked you will get this message.



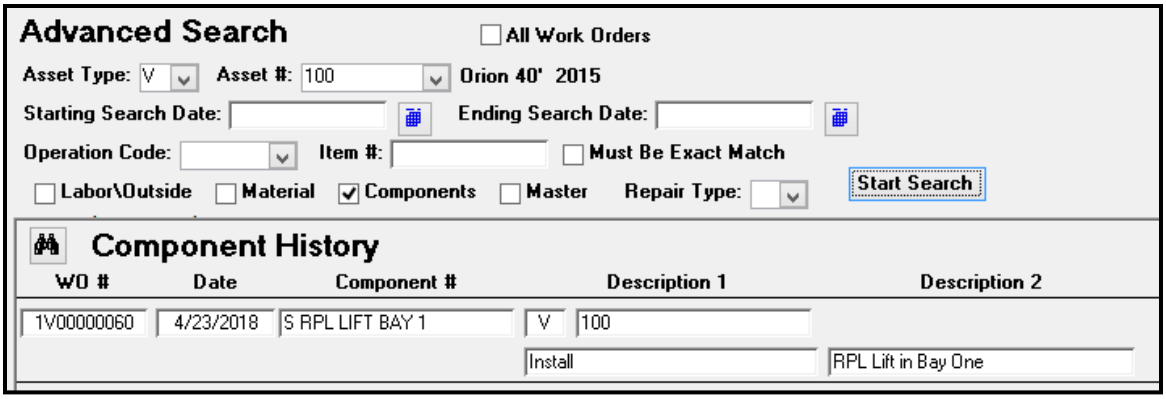
The **Labor/Outside** check box displays the following form.



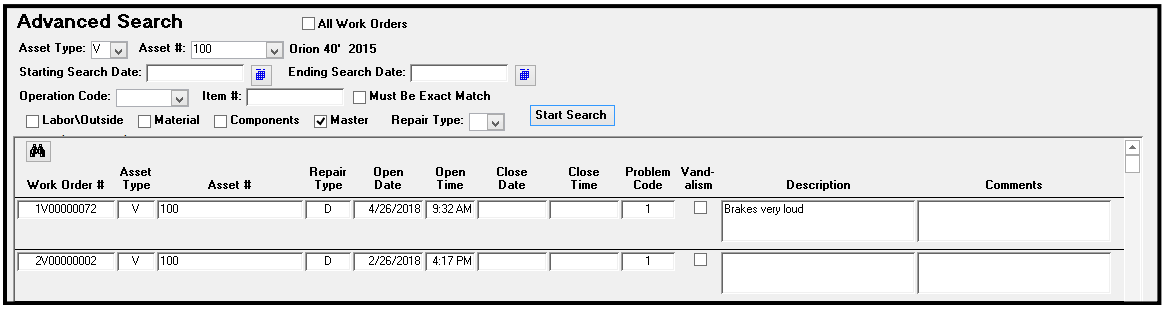
The **material** check box displays the following form.



The **Component** check box displays the following form.



The **Master** check box displays the following form.



Update

All work order entries are updated to vehicle component history, inventory master, and perpetual. General ledger entries are generated. Once updated, no changes can be made to Asset Type, Asset Number, Repair Type, and Class Code or assigned Inspections.

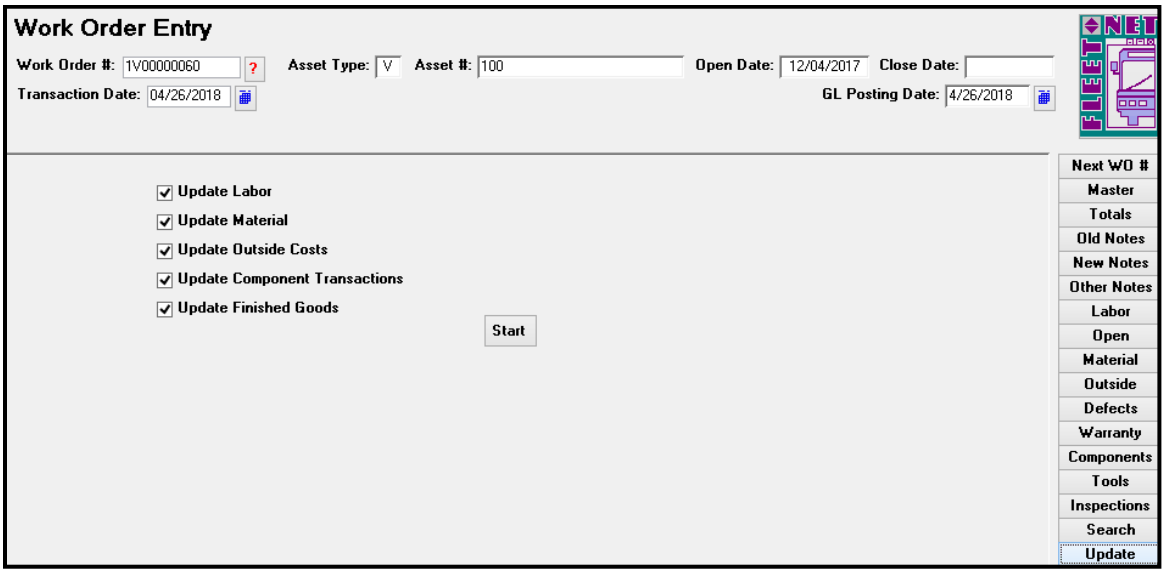
Work orders can be individually updated or as a batch.

Either method requires a GL Posting Date be entered. The GL journal entries generated will have this posting date.

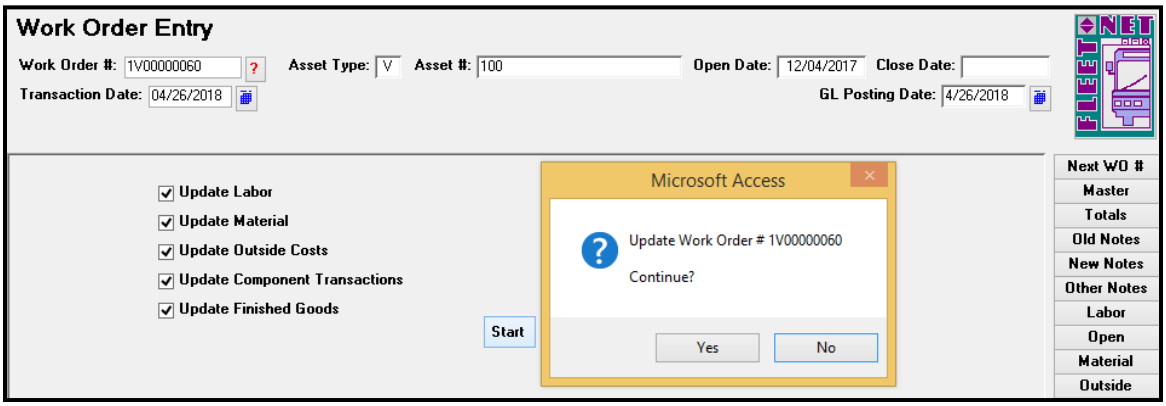
The default is set to update all work orders transactions

Individual Work Order update

Enter **GL Posting Date**
Click ***Update***.
The Work Order # is still populated – only this work order will be updated.
All transactions default to be updated. Uncheck any transactions that shouldn't be updated at this time.

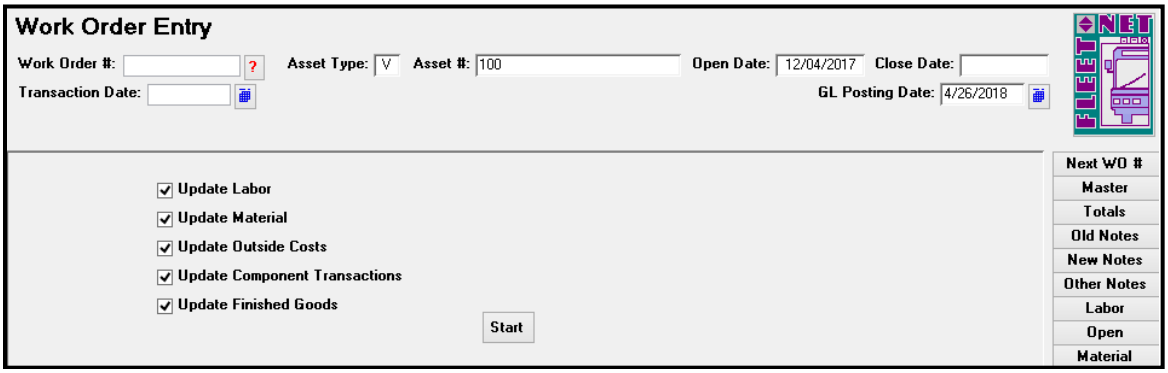


Click ***Start*** to begin the update.



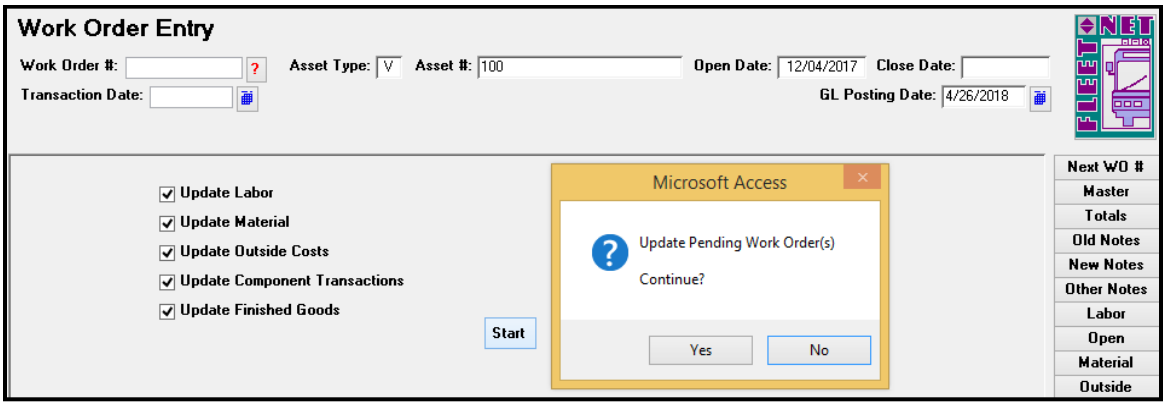
Pending Work Order update

This will update *all* work orders in pending status.
Click ***Update***.

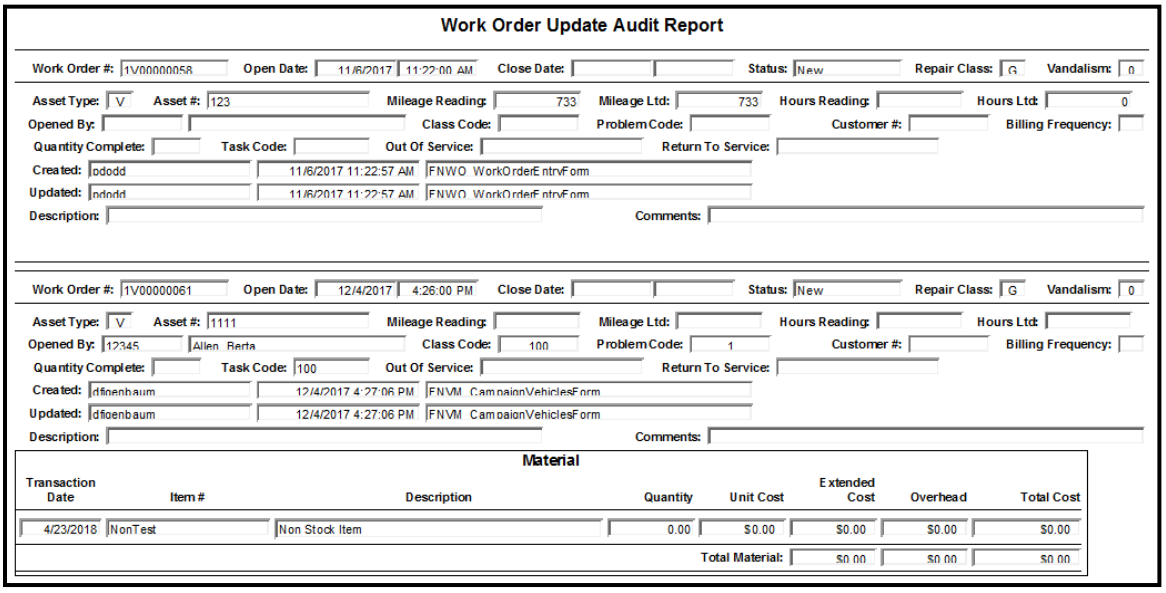


All transactions default to be updated. Uncheck any transactions that shouldn't be updated at this time.

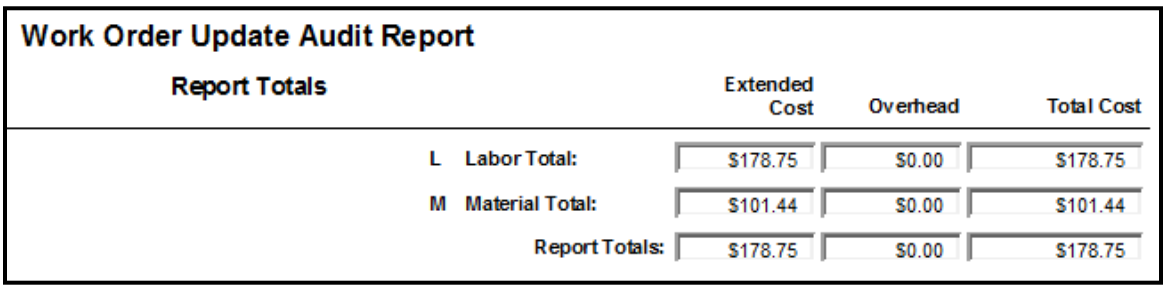
Click ***Start*** to begin the update.
All work orders that have been flagged to update in the Pending list will be updated.



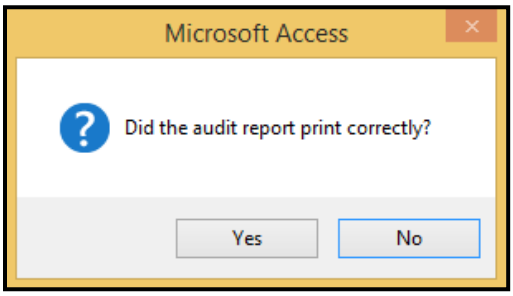
Once "Yes" is selected on the above prompt the following Work Order Update Audit Report will print. Use this report to check that entries were made correctly (especially Class Codes!). To print, use the File drop-down option and select print. This is your last opportunity to fix an erroneously coded work order before update. **Look this page over carefully!**



Once printed or viewed for accuracy, close the report. The next report that is generated is the Report Totals section of the Work Order Update Audit Report.



Once printed or viewed for accuracy close the report and continue with the update. User will be prompted to confirm if the report printed correctly, and all data entered is correct. To proceed with update, click YES to update the work orders or NO to abort the update and go back and make corrections.

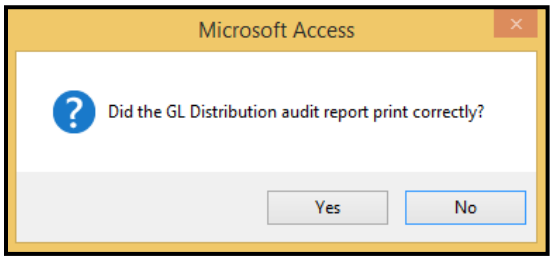


If “Yes” was selected above then the next report prints titled Work Order Update GL Distribution Audit Report. This illustrates the journal entries that will be generated to the WO subsidiary journal.

Work Order Update GL Distribution Audit Report

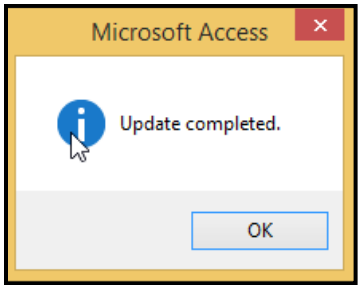
Fiscal Year	Div #	Account #	Work Order #	Date	Line #		Debits	Credits
2018	CATA	1030150100	Inventory					
			1V00000072	4/26/2018	108			$101.44
2018	CATA	1030150100				Account Totals:		$101.44
2018	CATA	5020104106	CB - F/Ben - FICA - Mechanics					
			1V00000072	4/26/2018	107		$100.00	
			1V00000072	4/26/2018	107			$100.00
			3V00000014	2/20/2018	95		$78.75	
			3V00000014	2/20/2018	95			$78.75
2018	CATA	5020104106				Account Totals:	$178.75	$178.75
2018	CATA	5049904190	CB - Maintenance - Revenue Vehicle					
			1V00000072	4/26/2018	108		$101.44	
2018	CATA	5049904190				Account Totals:	$101.44	
				Errors: 0		Report Totals:	$280.19	$280.19

If GL Distribution report printed correctly and is error free, then click “Yes” to proceed with update or “No” to abort.



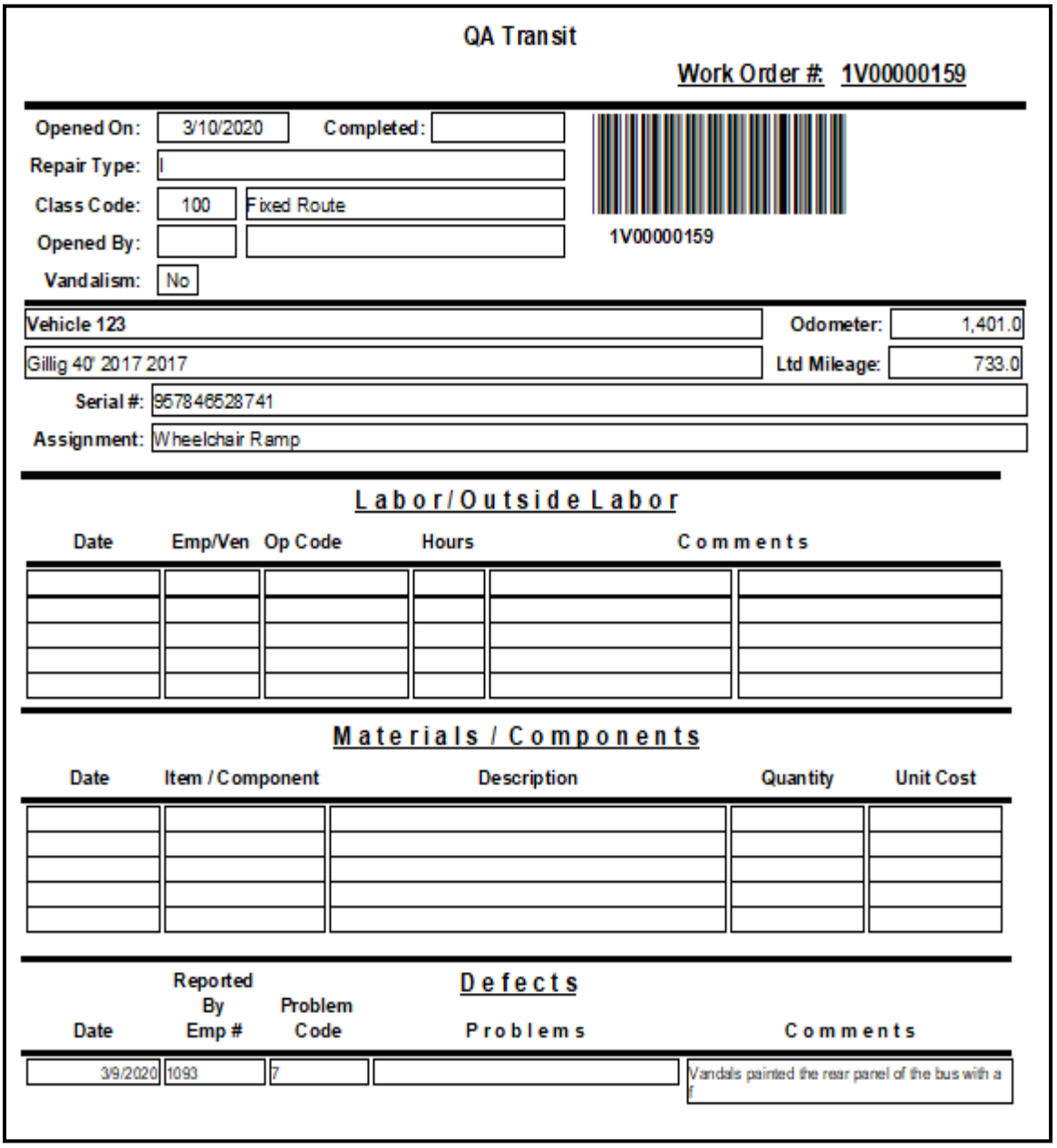
Following prompt indicates update has completed. Click ***OK*** to return to Work Order form.

NOTE: All entries processed through the update must be error free in order for the update to truly complete. Example: If 100 parts are being updated and 1 part doesn't have sufficient on hand quantity to issue out none of the parts will be updated. Review reports carefully to avoid this problem.



Print

Select ***Print*** to print the current work order with bar code for scanning, Labor and Material including blank lines for mechanic entries. (The number of blank lines was chosen during setup). Note: if Defects have been added to the work order, they will display at the bottom of the page



QA Transit

Work Order #: 1V00000159

Opened On:	3/10/2020	Completed:	
Repair Type:	I		
Class Code:	100	Fixed Route	
Opened By:			
Vandalism:	No		

1V00000159

Vehicle 123		Odometer:	1,401.0
Gillig 40' 2017 2017		Ltd Mileage:	733.0
Serial #:	957846528741		
Assignment:	Wheelchair Ramp		

Labor/Outside Labor

Date	Emp/Ven	Op Code	Hours	Comments

Materials / Components

Date	Item / Component	Description	Quantity	Unit Cost

Defects

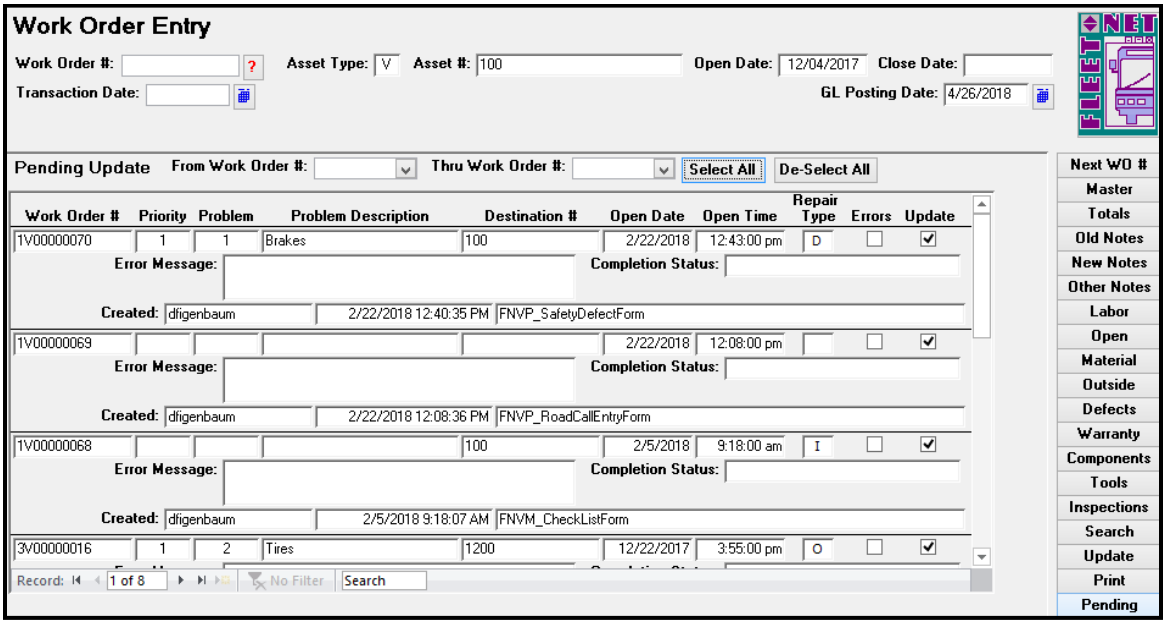
Date	Reported By Emp #	Problem Code	Problems	Comments
3/9/2020	1093	7		Vandals painted the rear panel of the bus with a f

Pending

Use ***Pending*** to select work orders for batch update.

All Pending Work Orders will be flagged to be updated as the default except for those Work Orders that were created through Inspection Planning (PM Checklist), Campaigns, Road Calls, and Safety Defects.

- The Update check box can be manually selected or de-selected.
- To uncheck the Update flag for all work orders, click the De-Select All button.
- To Select or De-Select a range of Work Order numbers enter the From Work Order # and Thru Work Order # fields.
- Only work orders with Update flag checked will be in batch updated.



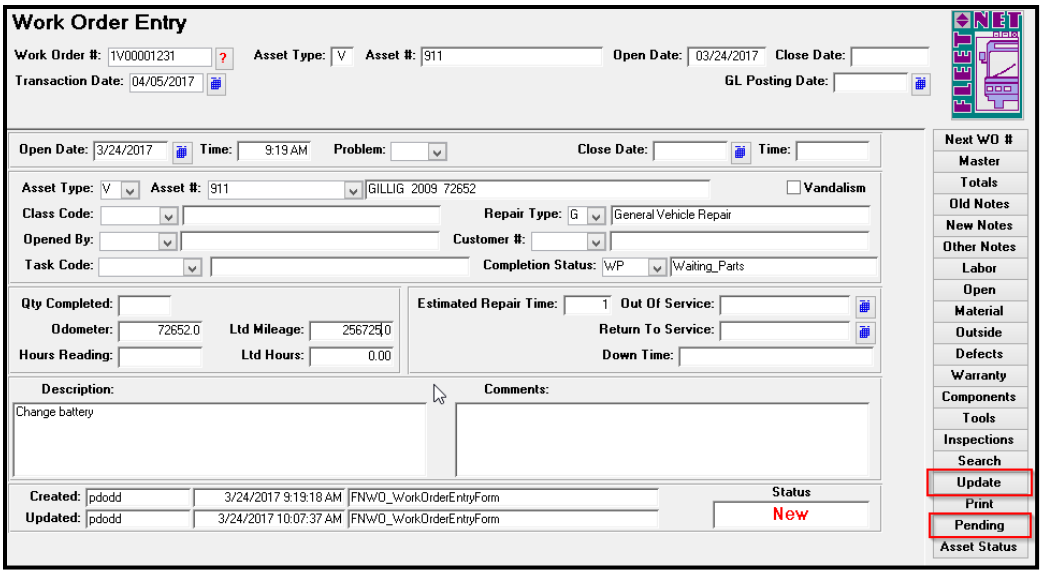
After Update selections are made, click ***Update*** to complete. Work Order Audit Report and GL Distribution Report are generated for review. All work order entries will be updated unless Errors occur. Return to Pending form to view errors on work orders. Double-click work order # to select and correct the errors.

Closing a Work Order

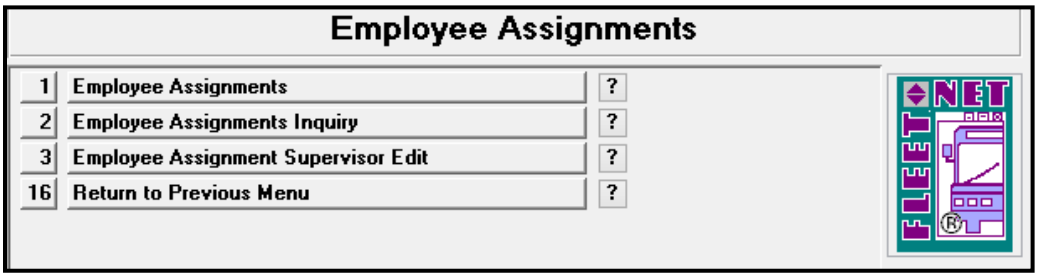
Enter a Close Date and update individually or in a batch. When work orders are closed and updated, Inspections will roll over based on Class Code reset setup; Overhauls for components will be updated, Vehicle Problems Road Calls and Defects will be updated.

Note: Labor, Material and Outside costs can still be added or removed from the work order.

Update will update just the work order currently on the screen. ***Pending*** will bring up all work orders which need updating to be closed in one batch.

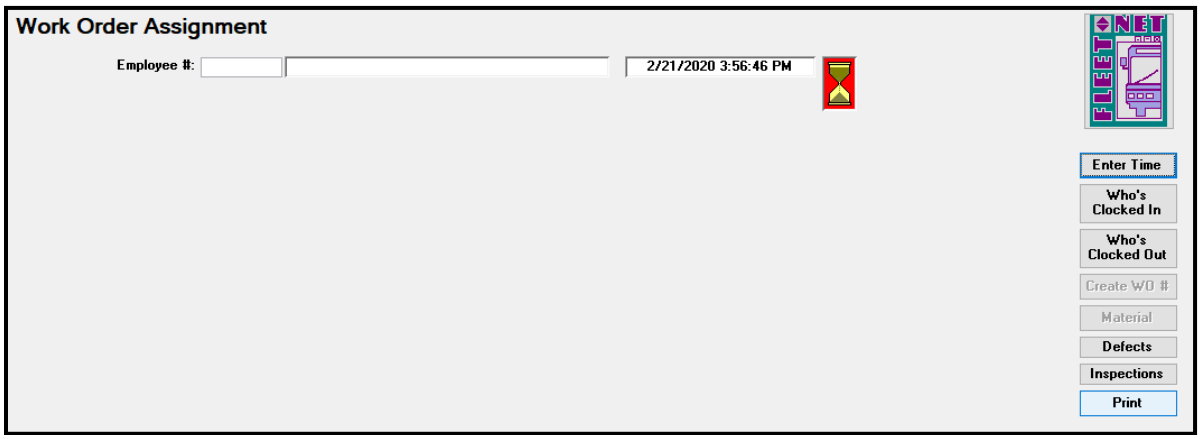


Employee Assignments



Work Order Assignments

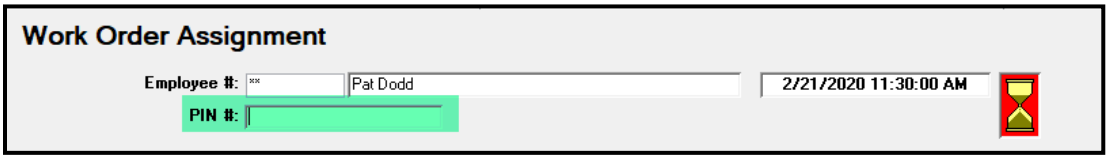
The Employee Assignment program allows a mechanic to clock in and out of a specific work order in Fleet-Net. Labor is tracked in the system by specific work order and labor operation code. When the task is completed, it writes a labor transaction record to the WO master. Employee may create Work Orders via this screen if they are given access in setup. Mechanics will use the Notes option to insert specifics about the job. They will also be able to add parts, add defects to a work order, and complete the inspection checklist (for inspection work orders).



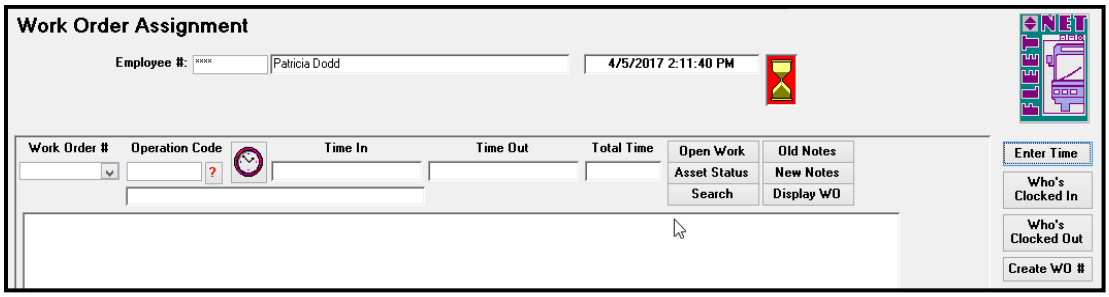
A user can enter labor time into an existing work order or create a new work order (if allowed access). The following instructions will illustrate how to clock into an existing work order, how to create a new WO via the Employee Assignments form, add notes, etc. Before the Employee Assignment form can be utilized, the user must have been set up via the Employee Setup and have a PIN created. Contact the IT or Payroll department for PIN assignments.

Clocking In

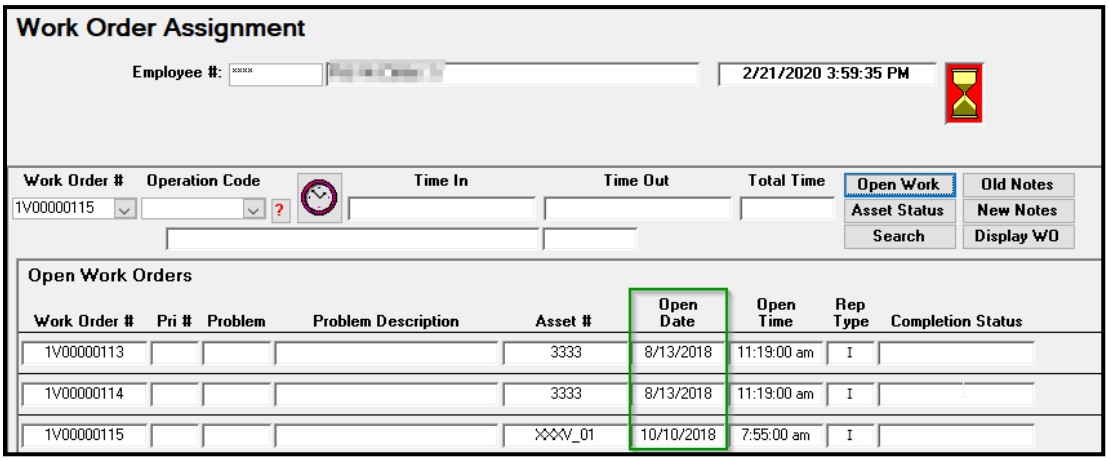
User will enter Employee # and press ***Enter***. The PIN # field will appear. Enter PIN # and press ***Enter.***



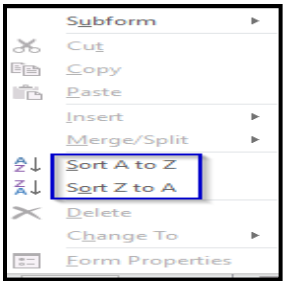
The following form will appear. Enter the WO# or use the drop-down option to locate an existing WO.



If the WO# is not known, the user can click ***Open Work*** to view all open WO's. The list displays in Open Date and Time order descending.

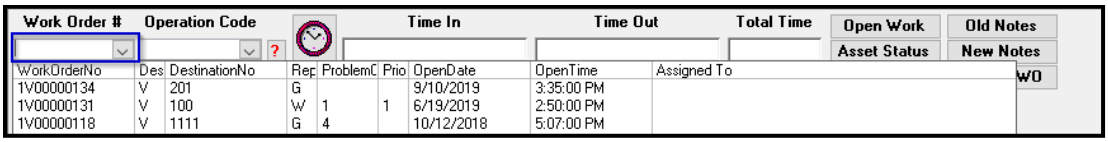


Right mouse-click within any column such as Asset # to sort the list in that order. In the pop up, click either the Sort A to Z or Sort Z to A option.

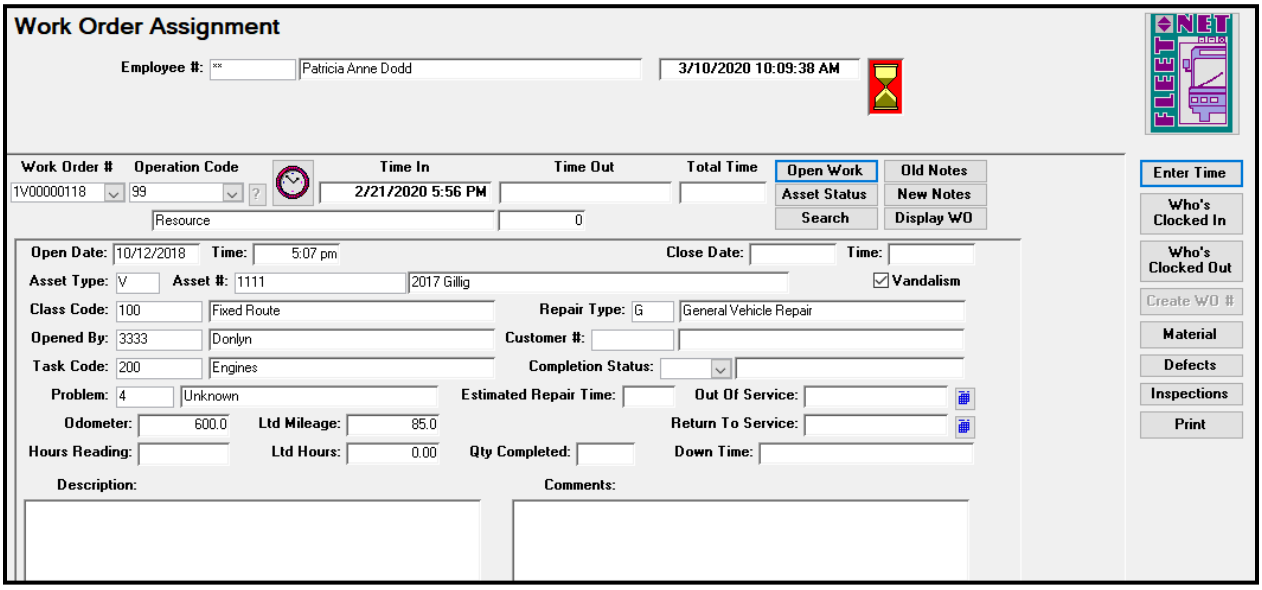


Double click the Work Order # from the list to populate it in the work order field of the form.

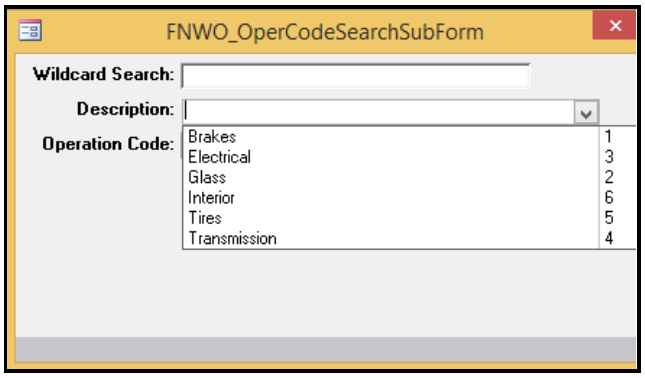
Another option is the select the drop-down option from the Work Order # field. The list is in WO # descending order. The first two characters of a WO # are the location and asset type. If WO's for another area such as facilities start with "4" they will appear at the top of the list. To access the vehicle WO's which may begin with a 1, begin typing 1V within the Work Order # field and it will take the user to that portion of the list, then click the WO from list to populate the field above.



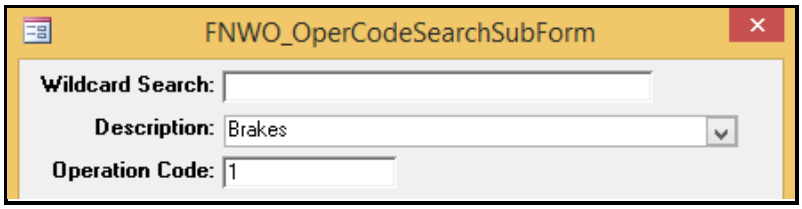
Once the WO is selected, the Labor Operation Code must be selected. The code can also be typed directly into the field.



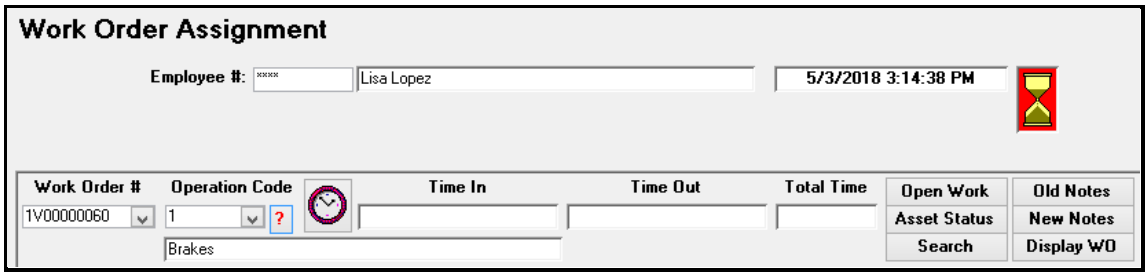
To see a list of codes, click the ? button. The following form appears. The drop-down options will display the list of labor operation codes in Description order.



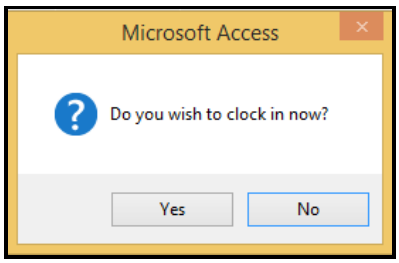
Click the code from the list that best describes the type of work about to be done. The code will be populated in the description field. Double click in the Operation Code Field to populate the code into the main form.



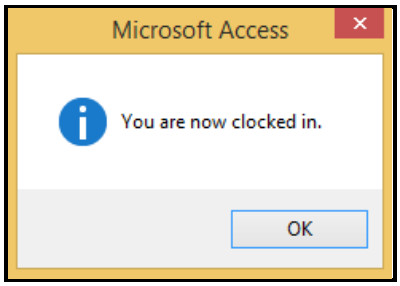
Once the Work Order and Operation Code have been populated, the user is ready to clock in. Click the clock to begin tracking time.



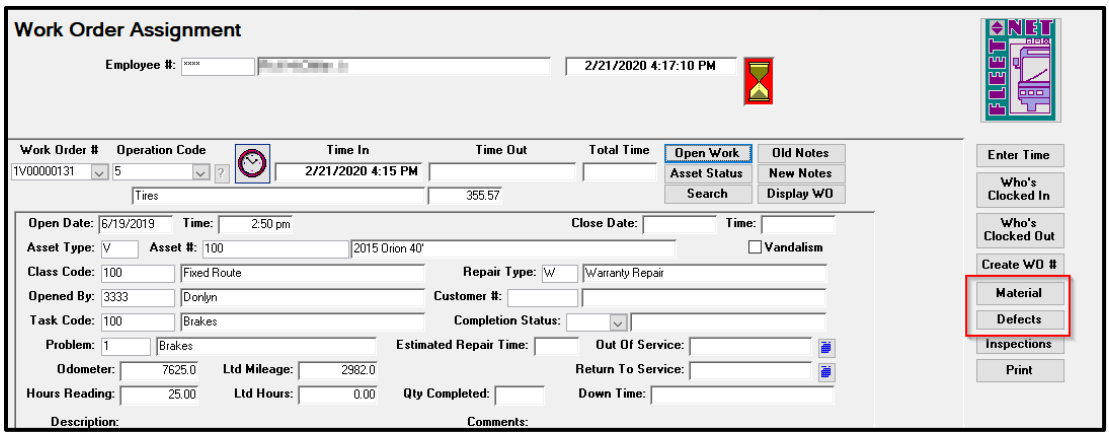
User will get the message below. Click ***Yes*** to proceed with the clocking in process.



Click ***OK*** to confirm.

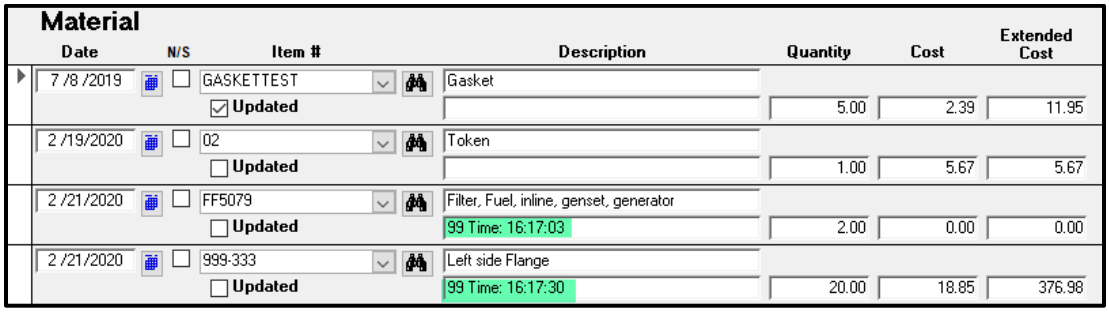


The form will now populate with the time clocked in. Notice the two buttons, ***Material*** and ***Defects***, are no longer grayed out. This is so the mechanic can add both to this work order***.***



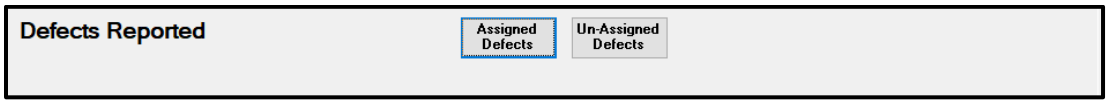
Materials

Click ***Material*** and here is where the mechanic can add parts to this work order. If parts were scanned with a handheld unit, they will display here. The top two parts were keyed in; the last two scanned, as it shows the mechanics number and time scanned.

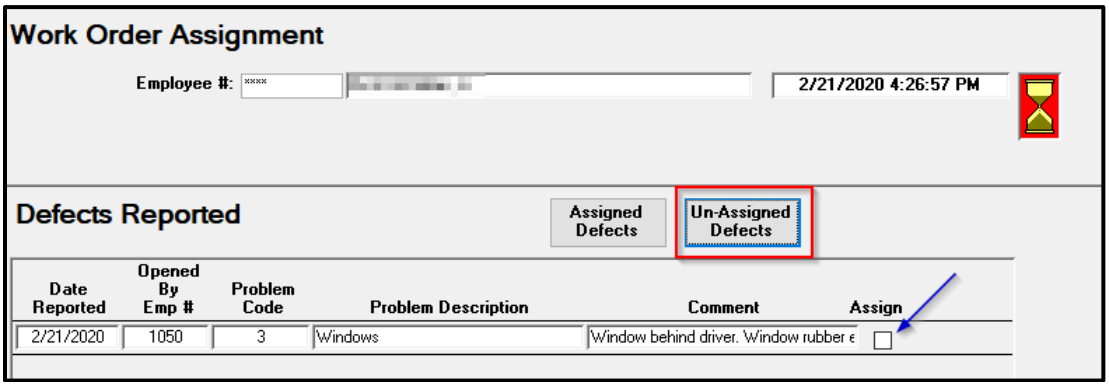


Defects

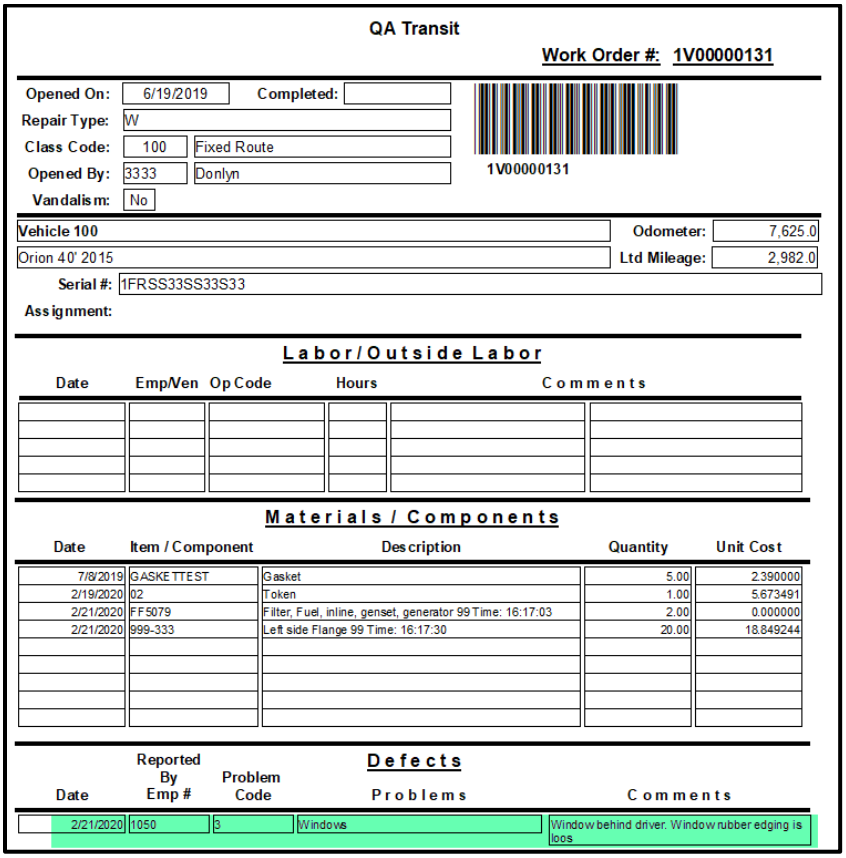
Deferred Defects are added in the Vehicle Problems module and can be added to any work order for that vehicle. Click ***Defect*** to see if there are any reported defects waiting for repair. The following will display.



Click on ***Assigned Defects*** to see if any defects have already been added to this work order. Click ***Un-Assigned Defects*** to view any that can be added to this work order. To add an unassigned defect, click the Assign box.



This will add the defect to the work order.



QA Transit

Work Order #: 1V00000131

Opened On: 6/19/2019 Completed:
Repair Type: W
Class Code: 100 Fixed Route
Opened By: 3333 Donlyn
Vandalism: No

1V00000131

Vehicle 100 Odometer: 7,625.0
Orion 40' 2015 Ltd Mileage: 2,982.0
Serial #: 1FRSS33SS33S33
Assignment:

Labor/Outside Labor

Date	Emp/Ven	Op Code	Hours	Comments

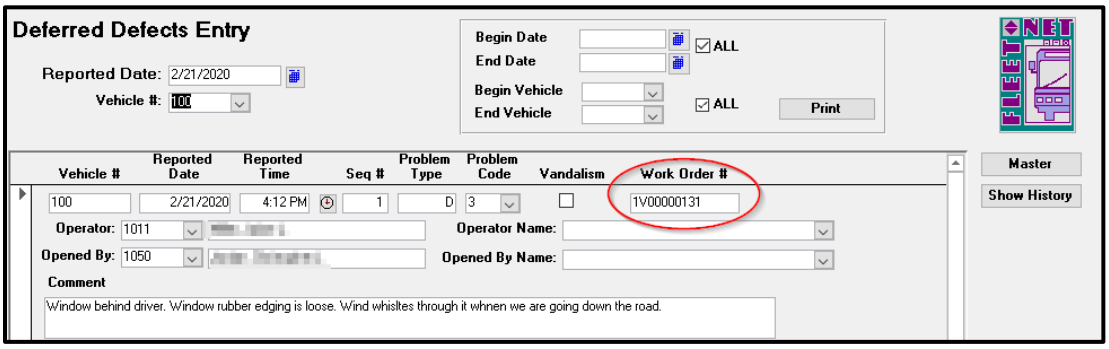
Materials / Components

Date	Item / Component	Description	Quantity	Unit Cost
7/8/2019	GASKETTEST	Gasket	5.00	2.390000
2/19/2020	02	Token	1.00	5.673491
2/21/2020	FF5079	Filter, Fuel, inline, genset, generator 99 Time: 16:17:03	2.00	0.000000
2/21/2020	999-333	Left side Flange 99 Time: 16:17:30	20.00	18.849244

Defects

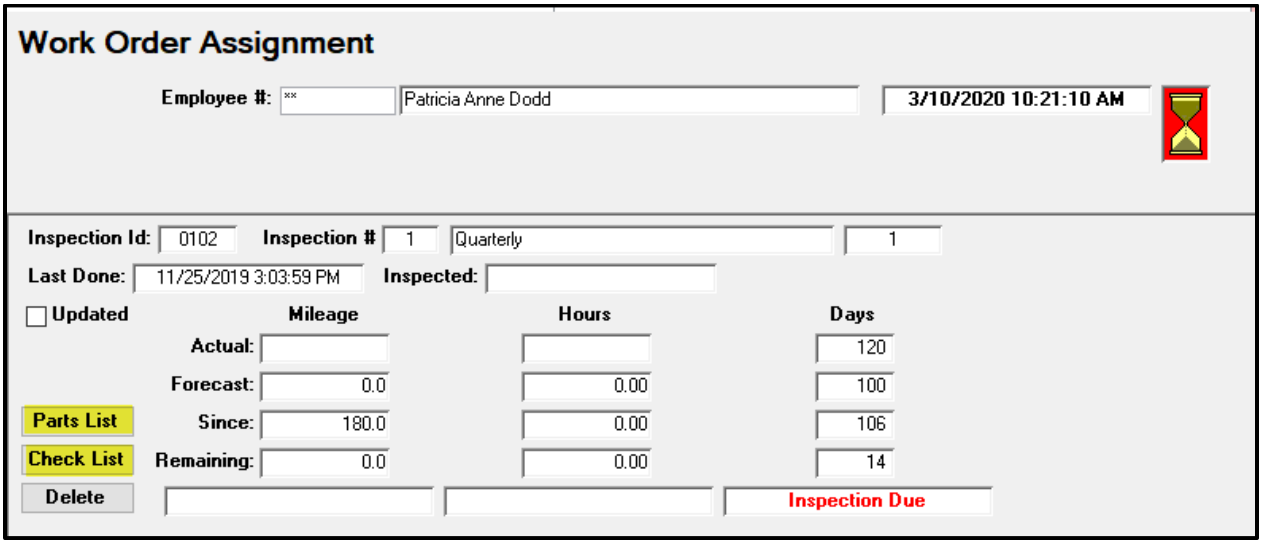
Date	Reported By Emp #	Problem Code	Problems	Comments
2/21/2020	1050	3	Windows	Window behind driver. Window rubber edging is loos

It will also display in the Vehicle Problems module on the Deferred Defect Entry screen.

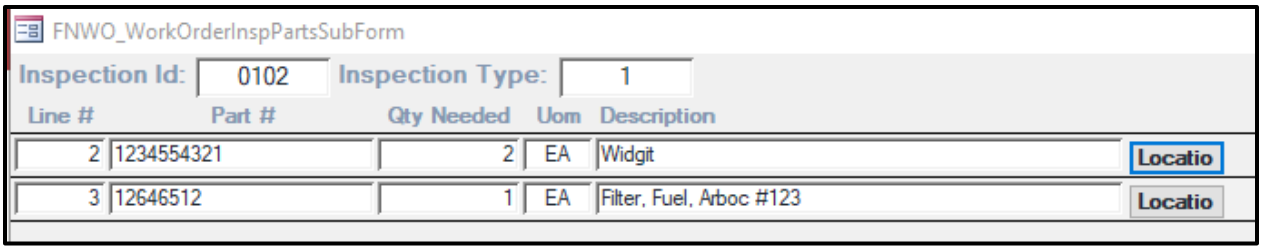


Inspections

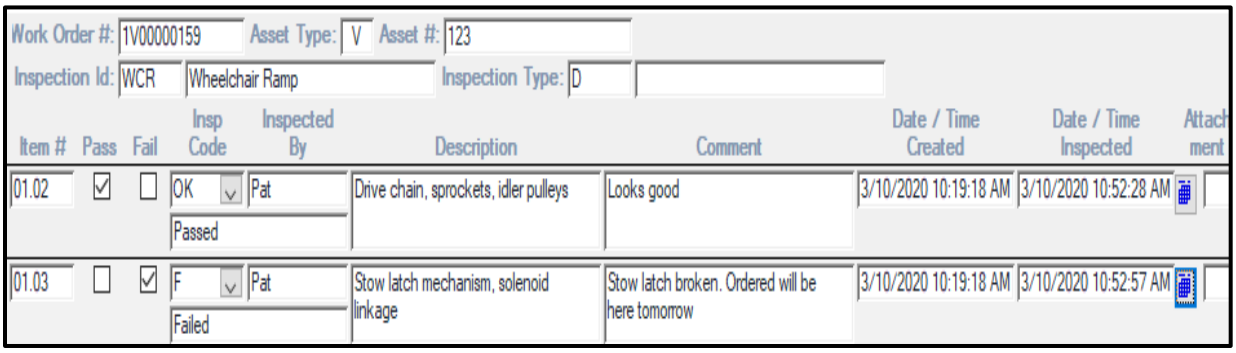
If the current work order is an Inspection work order, clicking ***Inspections*** will bring up the screen below.



The user can access the parts needs for this inspection by clicking on ***Parts List***. "No Parts List Found" will display if the list has not been created in the Inspection Master. Parts List will display with quantities needed as seen below. Location button will display Warehouse and Bin Number. This is for information only as not all parts are needed on every inspection.

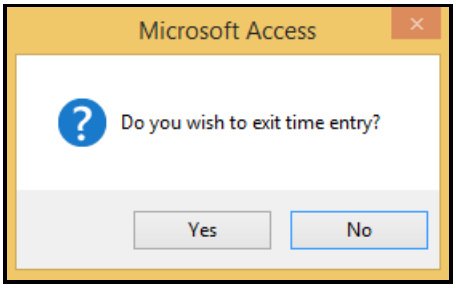


The user can access the checklist items for this inspection by clicking on ***Check List***. Pass or Fail must be chosen for each item.



Field	Description
Item #	Populated from the Checklist Items set up in Inspection Planning menu
Pass Fail	Once user clicks onto a line item, they must choose Pass or Fail
Insp Code	These codes must be entered in the Miscellaneous Code setup in WO01, Option #2. These are user defined. *Optional*
Inspected By	Tech can enter their name or employee number here. *Optional*
Description	Populated from the Checklist Items set up in Inspection Planning menu
Comment	User can type in a note in this box. Double click in this field to bring up a larger screen to type in or to read the existing note. *Optional*
Date/Time Created	Date the inspection work order was created
Date/Time Inspected	Click the blue calendar symbol to note when the item was completed. *Optional*
Attachment	Populated from the Checklist Items set up in Inspection Planning menu, if applicable

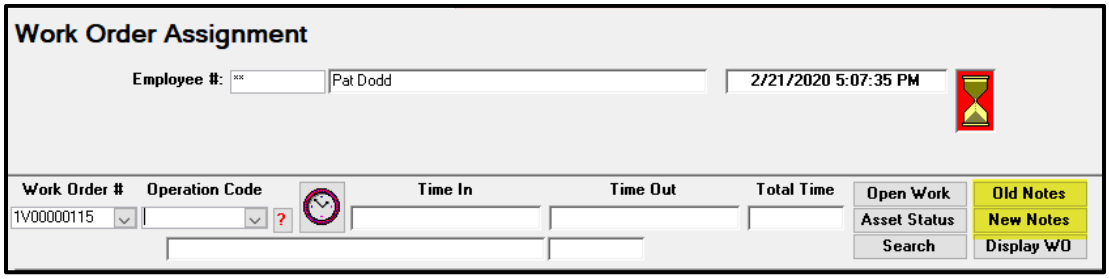
Click the bus icon in the upper right to exit the form. The following prompt appears. Click ***Yes*** to exit and begin work.



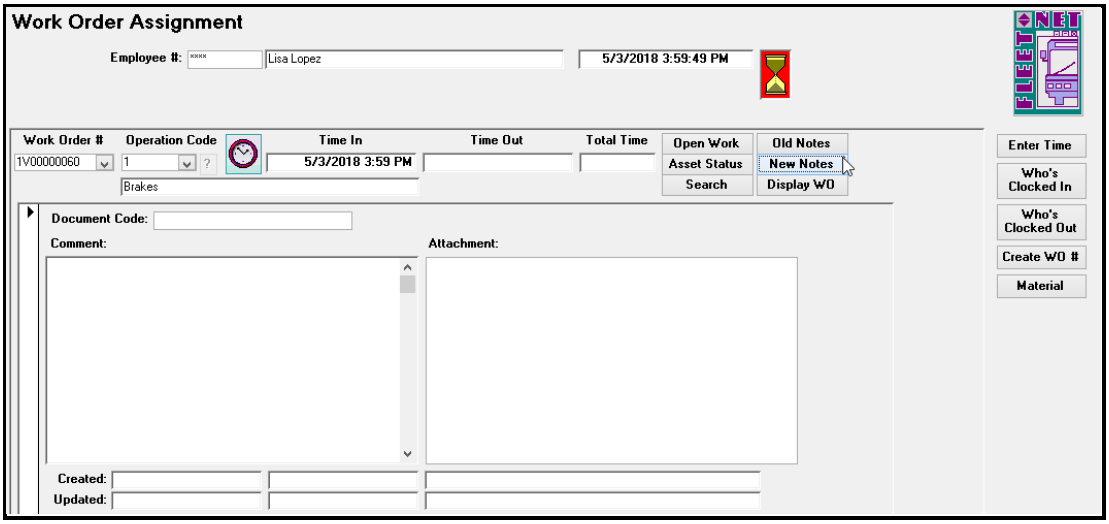
Adding Notes

Once the repair work is completed, the user will enter their employee # and PIN # to access the form once again. As they are clocked into a work order, the number will populate automatically in the Work Order # field.

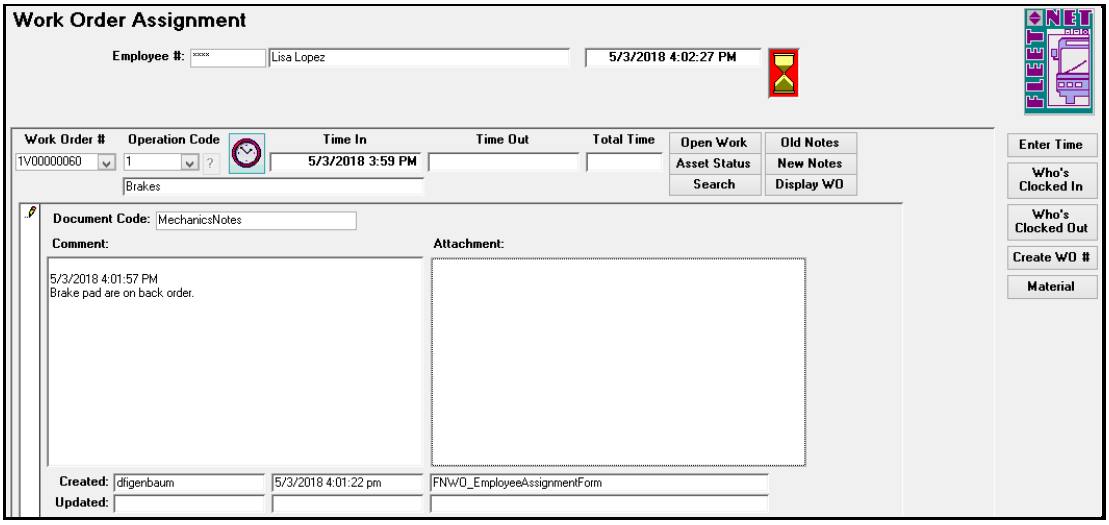
Before clocking out of a work order, the user must enter comments or findings regarding the repair via the Notes button. As seen below, there are two separate notes buttons: Old Notes and New Notes. The user must be clocked into a work order before being able to input New Notes. However, they do not have to clock into a work order to read its Old Notes.



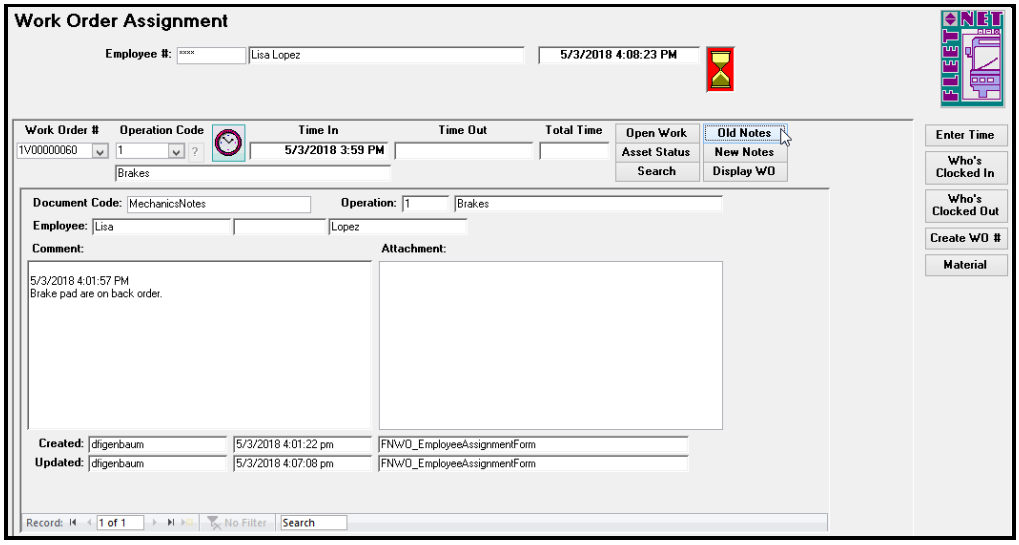
Click ***New Notes*** to enter notes. A blank form will appear for both the Comments and Attachment fields. If the user has already created a note in the past for the WO, then their notes that were entered before will appear.



Click into the ***Comment*** box and the system will automatically date and time stamp the record. Begin typing notes below the date.

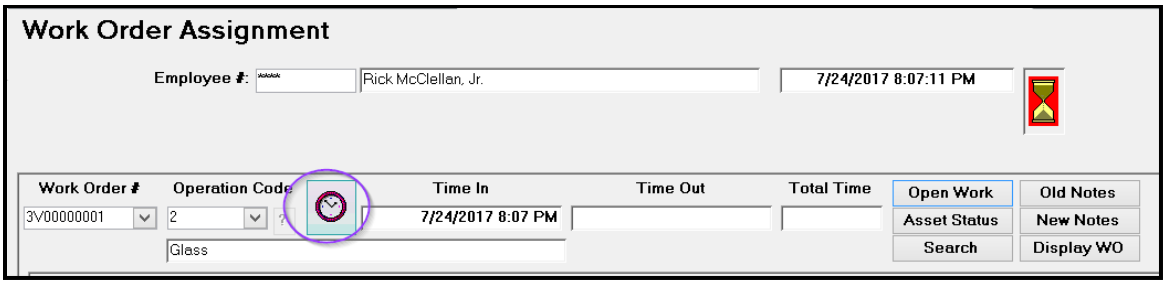


By clicking ***Old Notes***, the user can view all notes entered by the user themselves as well as other users regarding this work order. The user cannot alter any of the OLD NOTES by other users, only their own.

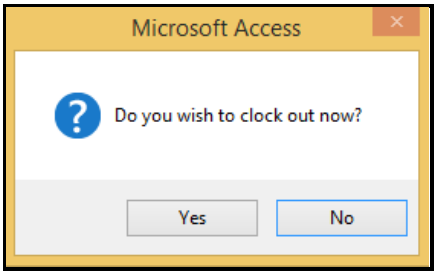


Clocking Out

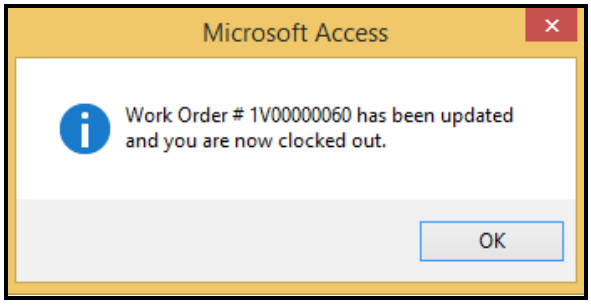
Once notes have been added, the mechanic will click the clock face to clock out.



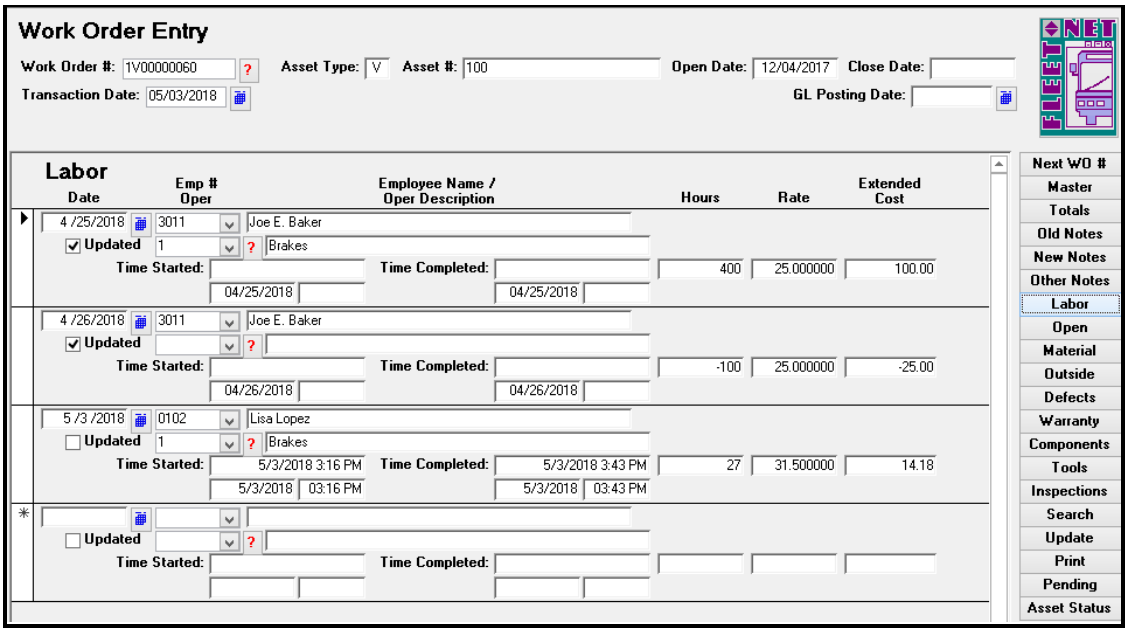
Click ***Yes*** to clock out.



Confirmation message appears. Click ***OK***.



Once the user has clocked out, a new labor entry record is automatically written for the corresponding WO. The record can be viewed via the Work Order Entry form.

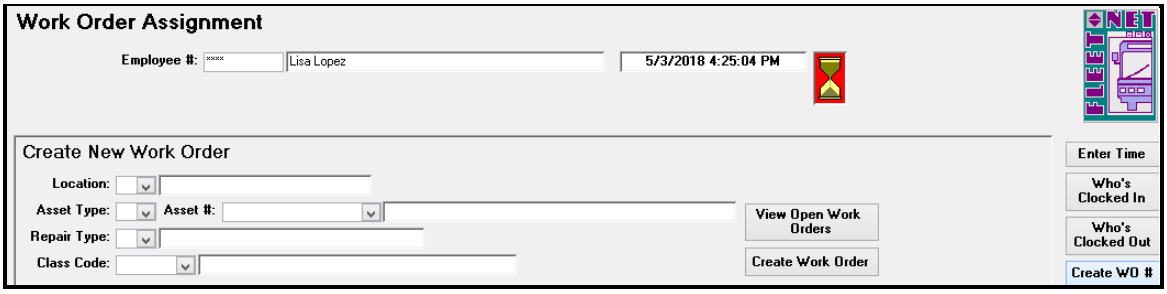


Creating a New WO

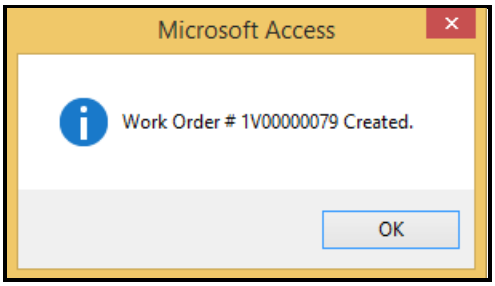
New Work Orders can be generated via Employee Work Order Assignment. Users must first have been given permission to create WO's via the Employee Setup option. ***Create WO #*** will not be visible to those users not given access to create work orders.

Sign in with employee # and PIN #. Click ***Create WO #.***

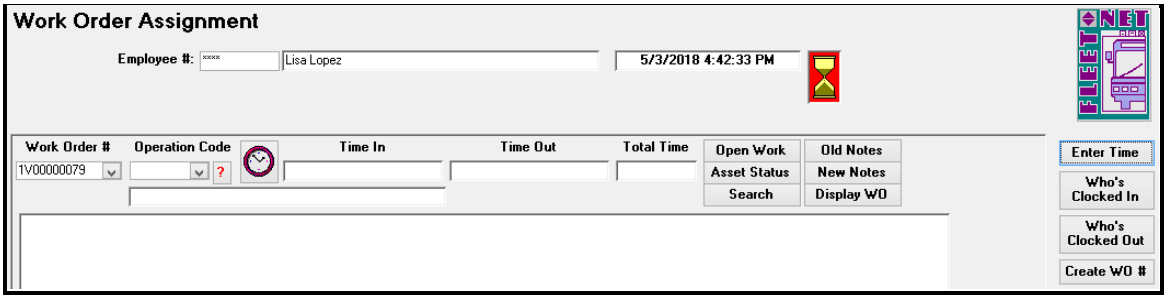
The following form appears. The Location, Asset Type, Repair Code and Class Code fields will automatically populate with the defaults that have been setup for the employee via the Employee Setup form. The defaults can be set for the type of work orders the employee creates the most. They can be overwritten here by selecting another choice from the drop-down options. Either way, all fields must be populated.



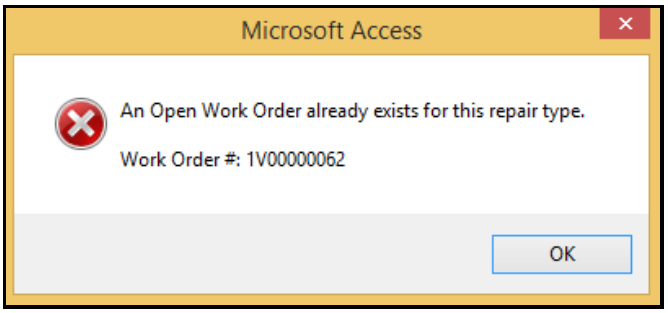
Click the ***Create Work Order***. The following prompt will list the newly created Work Order #. Click ***OK*** to proceed.



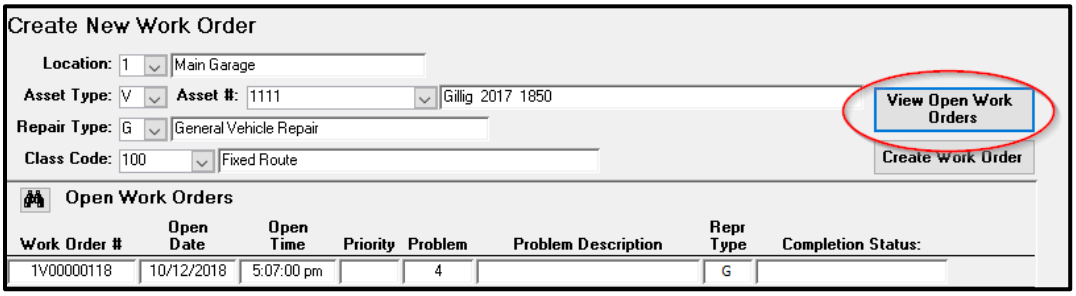
The newly created work order # will automatically populate at the top of the form ready for the user to select an Operation Code and clock in. At this point, the new work order can also be accessed via the Work Order Entry form. The work order creation process is complete.



The system will not allow a user to create a new work order for an asset/vehicle with the same Repair Type if an open work order already exists. The following prompt will appear. The next step will provide a tool to help identify which work orders are still open.



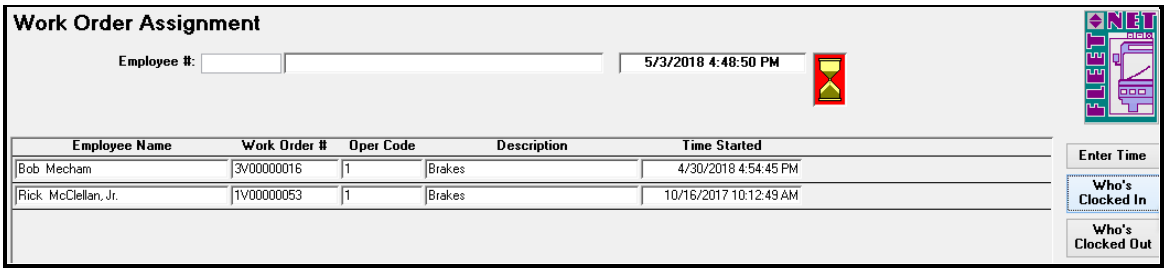
One option that is available during the work order creation process is the ***View Open Work Orders***. It works in a similar fashion as the ***Open Work*** described in Clocking into a Work Order. However, this option will show open work orders for just the Asset # entered. In the example below, there is just one open work orders for vehicle 1111.



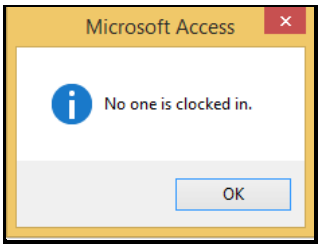
Who's Clocked In/Out

Another feature within Employee Assignments is the ability to see who is currently clocked into a work order and who is not. A user can access these two buttons directly without having to sign in with their employee # or PIN #.

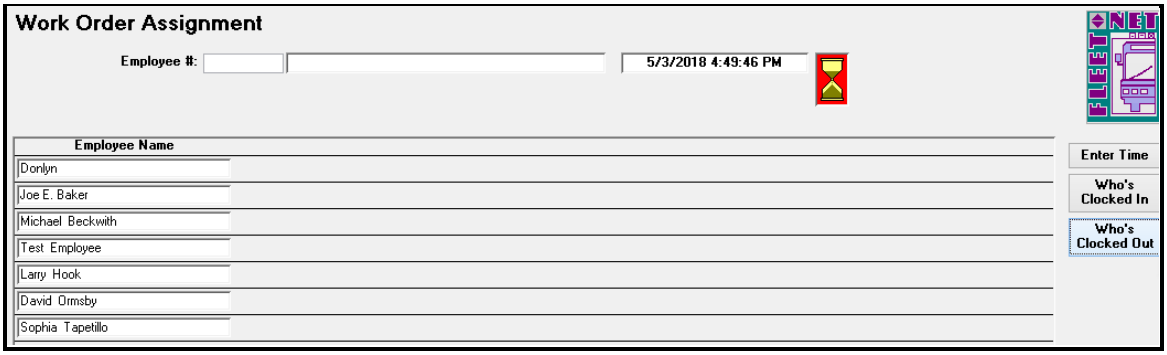
Click ***Who's Clocked In*** to see all users currently clocked into a work order via Employee Assignments.



If no users are clocked in the following prompt will appear.



Click ***Who's Clocked Out*** to see a list of names of users that are not clocked into a work order.

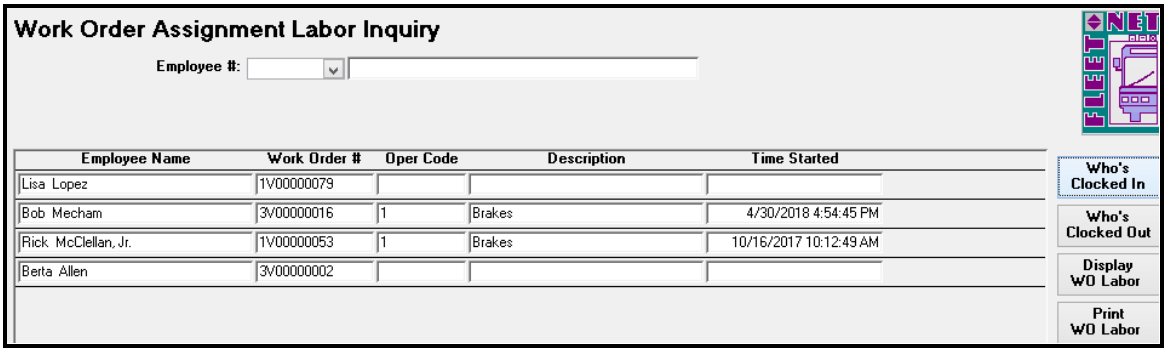


Work Order Assignment Labor Inquiry

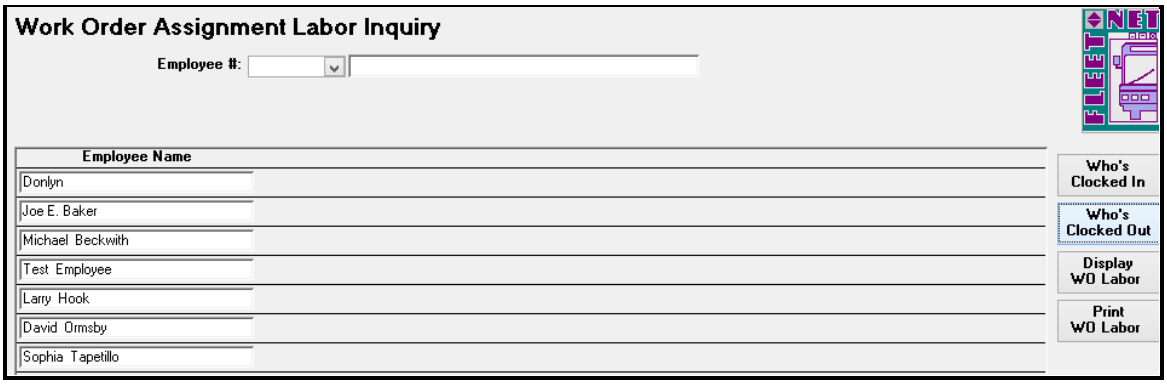
This form is for Inquiry only to view Who's Clocked In, Who's Clocked In, Display WO Labor, and Print WO Labor records. ***Who's Clocked In***/ and ***Who's Clocked Out*** can be reviewed without an Employee # being entered.

Labor history can be reviewed for a single employee by entering the Employee # **OR** all labor history for all employees can be reviewed by leaving Employee # field blank.

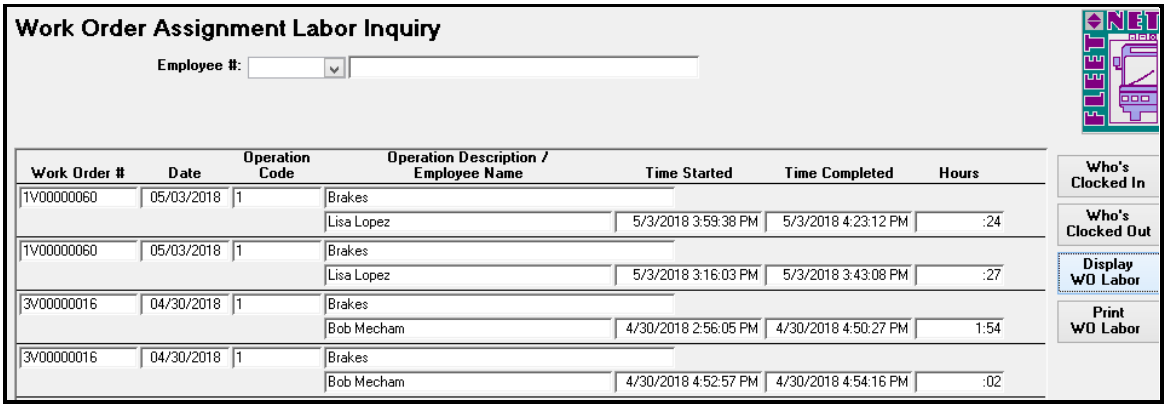
Click ***Who's Clocked In*** to see all users currently clocked into a work order via Employee Assignments. The list will display the Employee Name, Work Order, Operation Code, Description and Time Started.



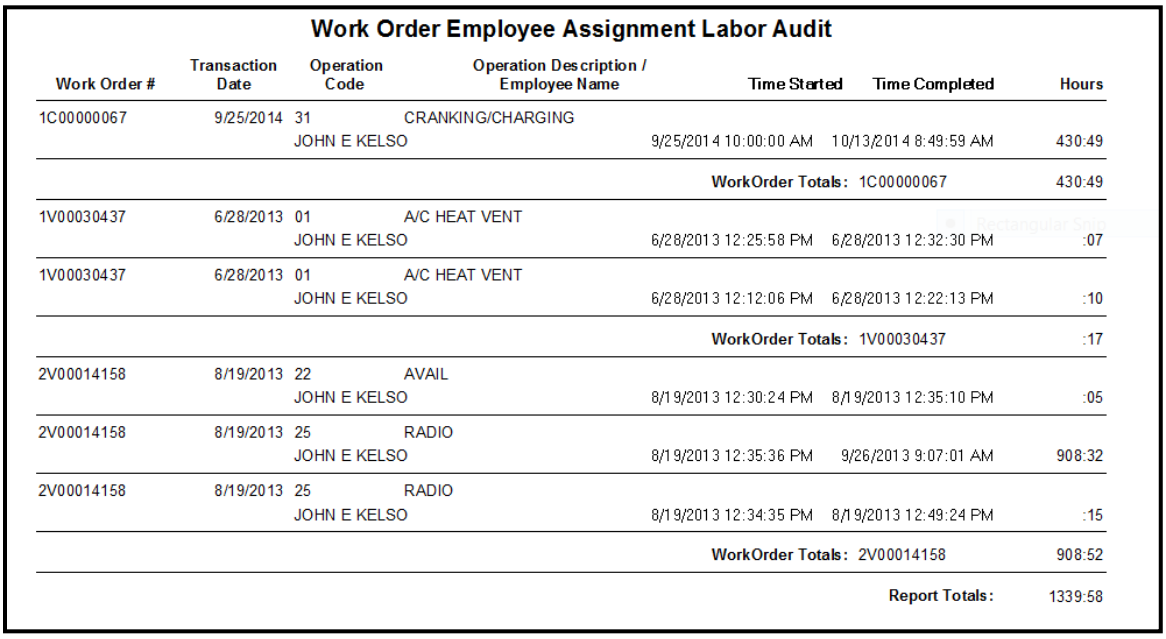
Click ***Who's Clocked Out*** to see a list of names of users that are not clocked into a work order.



Click ***Display WO Labor*** to see a list of all labor updated to Work orders for the selected employee or leave blank for all labor entries



Click ***Print WO Labor*** to preview a report for all labor updated to Work orders for the selected employee



Work Order Employee Assignment Labor Audit

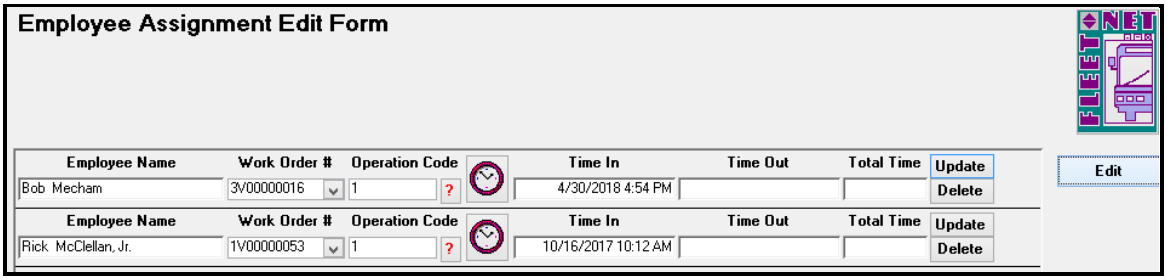
Work Order #	Transaction Date	Operation Code	Operation Description / Employee Name	Time Started	Time Completed	Hours
1C00000067	9/25/2014	31	CRANKING/CHARGING			
			JOHN E KELSO	9/25/2014 10:00:00 AM	10/13/2014 8:49:59 AM	430:49
				WorkOrder Totals:	1C00000067	430:49
1V00030437	6/28/2013	01	A/C HEAT VENT			
			JOHN E KELSO	6/28/2013 12:25:58 PM	6/28/2013 12:32:30 PM	:07
1V00030437	6/28/2013	01	A/C HEAT VENT			
			JOHN E KELSO	6/28/2013 12:12:06 PM	6/28/2013 12:22:13 PM	:10
				WorkOrder Totals:	1V00030437	:17
2V00014158	8/19/2013	22	AVAIL			
			JOHN E KELSO	8/19/2013 12:30:24 PM	8/19/2013 12:35:10 PM	:05
2V00014158	8/19/2013	25	RADIO			
			JOHN E KELSO	8/19/2013 12:35:36 PM	9/26/2013 9:07:01 AM	908:32
2V00014158	8/19/2013	25	RADIO			
			JOHN E KELSO	8/19/2013 12:34:35 PM	8/19/2013 12:49:24 PM	:15
				WorkOrder Totals:	2V00014158	908:52
					Report Totals:	1339:58

Employee Assignment Edit Form (Supervisor)

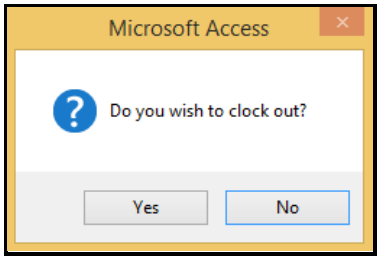
This form allows supervisors to edit Time Clocked In or clock out an employee. Access to this menu item should be limited to supervisors and above.

Click ***Edit.***

This will display **only** employees who are clocked in and have not yet clocked out.



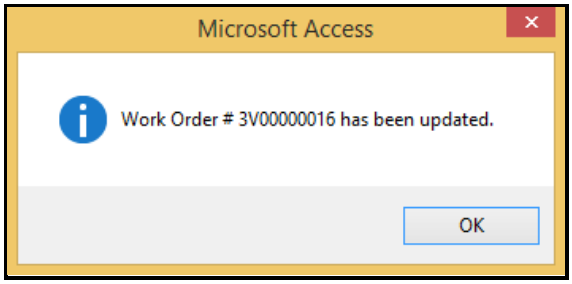
Click the clock icon to populate the Time Out date and time field, or key it in manually. click ***Update***. Click ***Delete*** to delete the record entirely. The following confirmation message displays.



Click ***Yes*** to continue, Click ***No*** to clear the Time Out field.

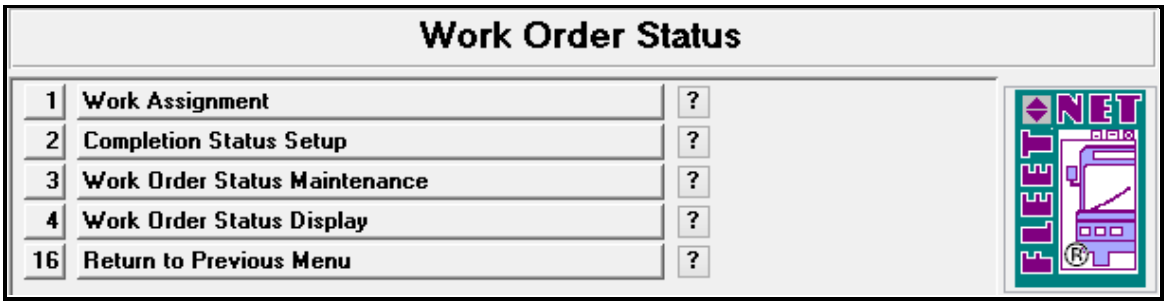
The Time In field can also be modified – the format must be mm/dd/yyyy hh:mm AM or PM

Once the time in and out are correct, the Total Time field is calculated.
The Update button will transfer the records to WO Labor. The following comfirmation message displays:



Work Order Status

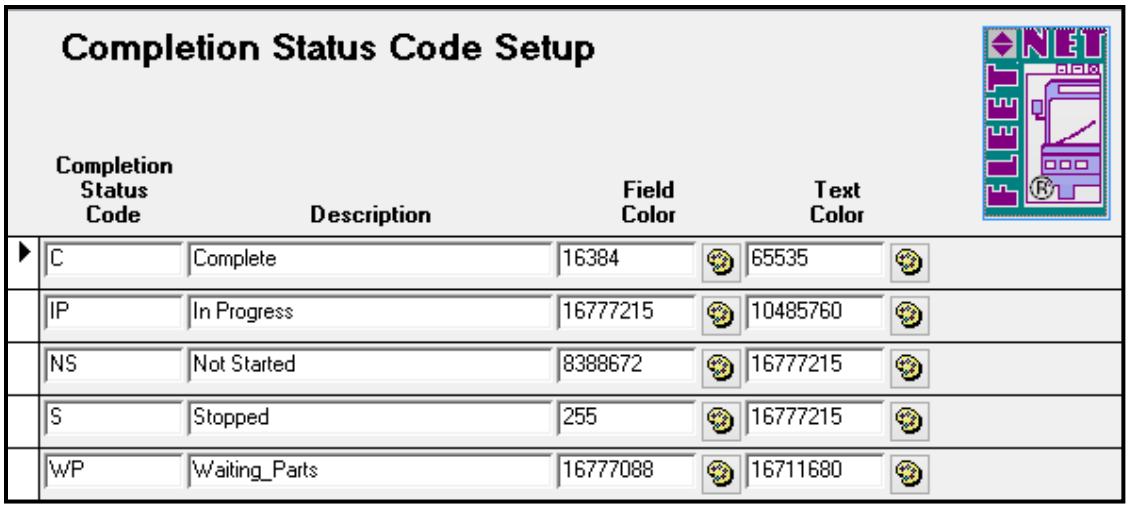
The Work Assignment Display can be viewed on a large monitor in the shop to track all open work orders or put on the mechanics' menus so they can view it on their computers.



Completion Status Setup

This allows user to customize the Completion Status field on the Work Assignment display screen.

Enter the Complete Status Codes as they will be seen in the drop-down on Work Order Entry and on the Work Assignment Display. Click the palette to choose a Field (background) Color and a Text (lettering) Color. Try for contrast so they can be read on a TV screen or computer monitor in the Shop or in Facilities.

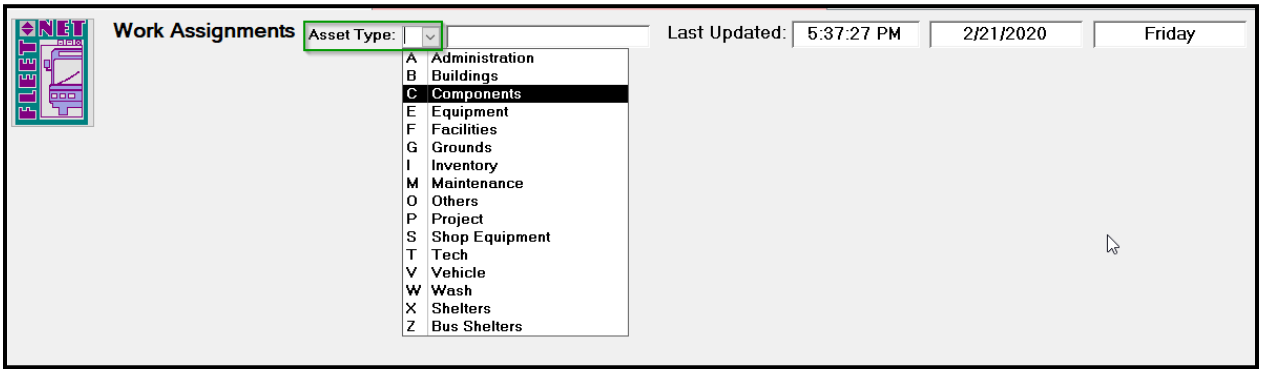


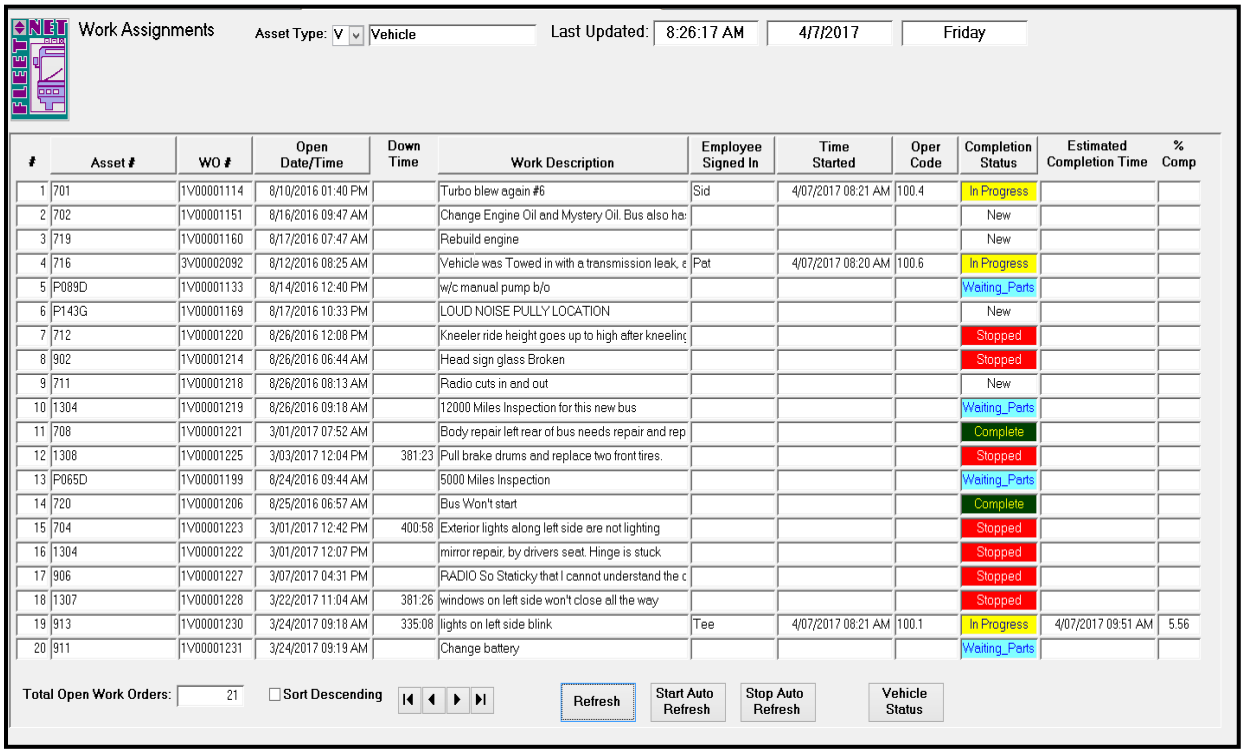
Work Assignment

This screen will display all open work orders with their descriptions, who is clocked in to them, how long the vehicle has been down and, based on the estimated work completion time entered in the Work Order entry, will calculate the Estimated Completion Time and the % of time passed from when the tech clocked into the work order. If the estimated completion time is four hours and the tech has been clocked into the work order for 1 hour, the % Comp will show 25%. This will add all the labor entries for that work order number.

This is a real time display and no fields can be changed here. If desired, the user must go to WO Entry or Employee Assignment to make any needed changes. The following buttons can be clicked to *re-sort* this screen: Asset #, WO #, Open Date/Time, Work Descripton, Employee Signed IN, Time Started, Oper Code and Completion Status.

Click ***Work Assignment*** and choose the Asset Type.





#	Asset #	WO #	Open Date/Time	Down Time	Work Description	Employee Signed In	Time Started	Oper Code	Completion Status	Estimated Completion Time	% Comp
1	701	1V00001114	8/10/2016 01:40 PM		Turbo blew again #6	Sid	4/07/2017 08:21 AM	100.4	In Progress		
2	702	1V00001151	8/16/2016 09:47 AM		Change Engine Oil and Mystery Oil. Bus also ha:				New		
3	719	1V00001160	8/17/2016 07:47 AM		Rebuild engine				New		
4	716	3V00002092	8/12/2016 08:25 AM		Vehicle was Towed in with a transmission leak, a	Pat	4/07/2017 08:20 AM	100.6	In Progress		
5	P089D	1V00001133	8/14/2016 12:40 PM		w/c manual pump b/o				Waiting_Parts		
6	P143G	1V00001169	8/17/2016 10:33 PM		LOUD NOISE PULLY LOCATION				New		
7	712	1V00001220	8/26/2016 12:08 PM		Kneeler ride height goes up to high after kneeling				Stopped		
8	902	1V00001214	8/26/2016 06:44 AM		Head sign glass Broken				Stopped		
9	711	1V00001218	8/26/2016 08:13 AM		Radio cuts in and out				New		
10	1304	1V00001219	8/26/2016 09:18 AM		12000 Miles Inspection for this new bus				Waiting_Parts		
11	708	1V00001221	3/01/2017 07:52 AM		Body repair left rear of bus needs repair and rep				Complete		
12	1308	1V00001225	3/03/2017 12:04 PM	381:23	Pull brake drums and replace two front tires.				Stopped		
13	P065D	1V00001199	8/24/2016 09:44 AM		5000 Miles Inspection				Waiting_Parts		
14	720	1V00001206	8/25/2016 06:57 AM		Bus Won't start				Complete		
15	704	1V00001223	3/01/2017 12:42 PM	400:58	Exterior lights along left side are not lighting				Stopped		
16	1304	1V00001222	3/01/2017 12:07 PM		mirror repair, by drivers seat. Hinge is stuck				Stopped		
17	906	1V00001227	3/07/2017 04:31 PM		RADIO So Staticky that I cannot understand the c				Stopped		
18	1307	1V00001228	3/22/2017 11:04 AM	381:26	windows on left side won't close all the way				Stopped		
19	913	1V00001230	3/24/2017 09:18 AM	335:08	lights on left side blink	Tee	4/07/2017 08:21 AM	100.1	In Progress	4/07/2017 09:51 AM	5.56
20	911	1V00001231	3/24/2017 09:19 AM		Change battery				Waiting_Parts		

Field	Description
Asset #	Automatically populated **– cannot be edited**
WO#	Automatically populated **– cannot be edited**
Open Date/Time	Automatically populated **– cannot be edited**
Down Time	This calculates from the Out of Service Date and Time entered on the WO.
Work Description	Automatically populated from the description entered when work order was created.
Employee Signed In	This will populate when the tech clocks into the WO.
Time Started	Automatically populated with the date and time the tech clocks into the WO
Oper Code	Displays the Operation Code chosen by the tech when clocking in.
Completion Status	This will display the status chosen on the WO.
Estimated Completion Time	This field calculates from the Estimated Repair Time from the WO. It will total all time on the work order so far, including labor from another mechanic
% Comp	Calculated field- how much of the work has been completed.

Sort Descending

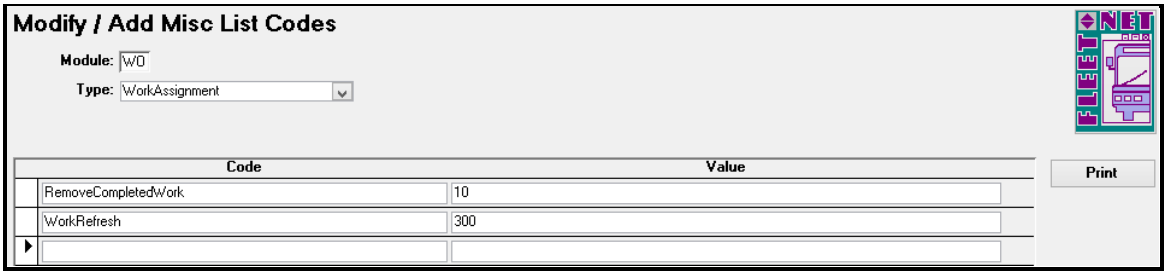
The program is set to display in ascending order. Use this button to change it to descending. Click ***Refresh*** to have the change take affect.

Page Up/Down

Click the center arrows to go up or down a single page. Click the outer arrows to go to the first or last page.

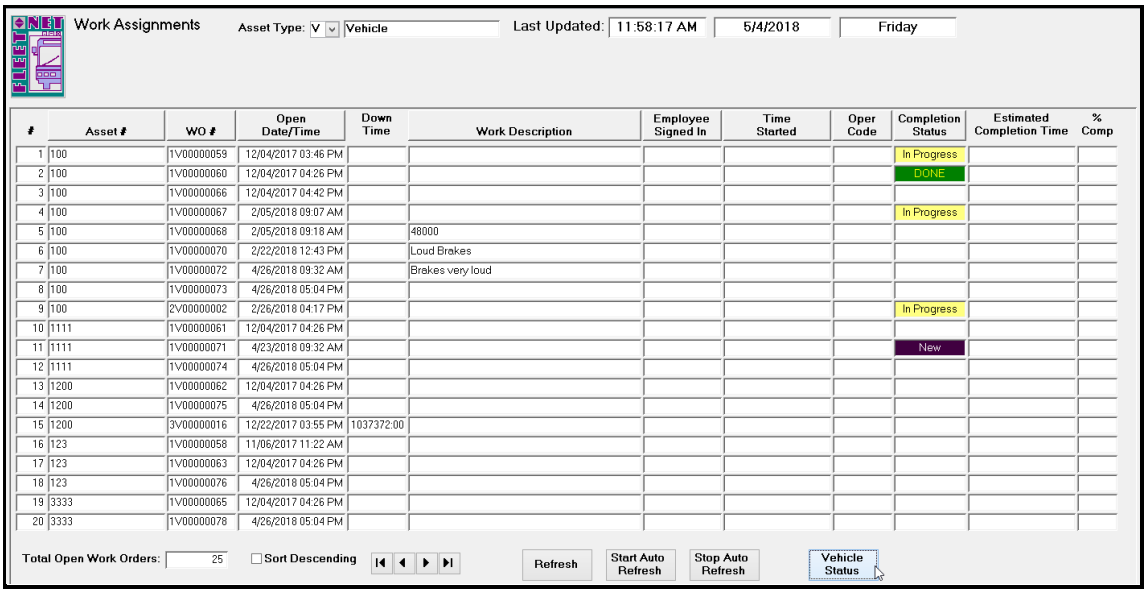
Refresh

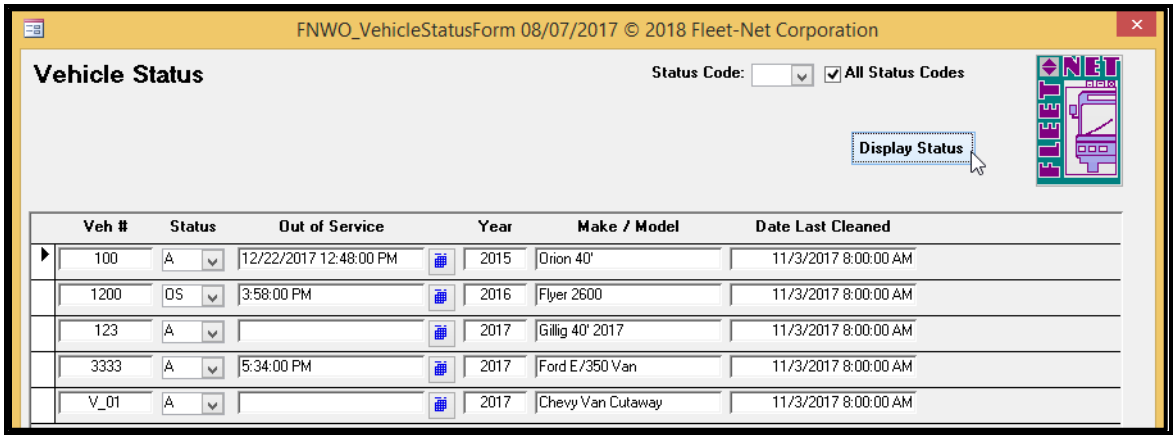
Use ***Refresh*** to do a refresh immediately. To set up autorefresh, go to the Work Order Miscellaneous List (WO01 #2) and choose WorkAssignment from the drop-down. Remove Completed Work Order is in minutes so 10 means that every 10 minutes Work Orders with a Closed Date will come off of the display. In the WorkRefresh field, choose the interval you want the screen to refresh (these are in seconds). In the example below, 300 was entered so when you click Start Auto Refresh, it tells the screen to refresh every 300 seconds or 5 minutes.



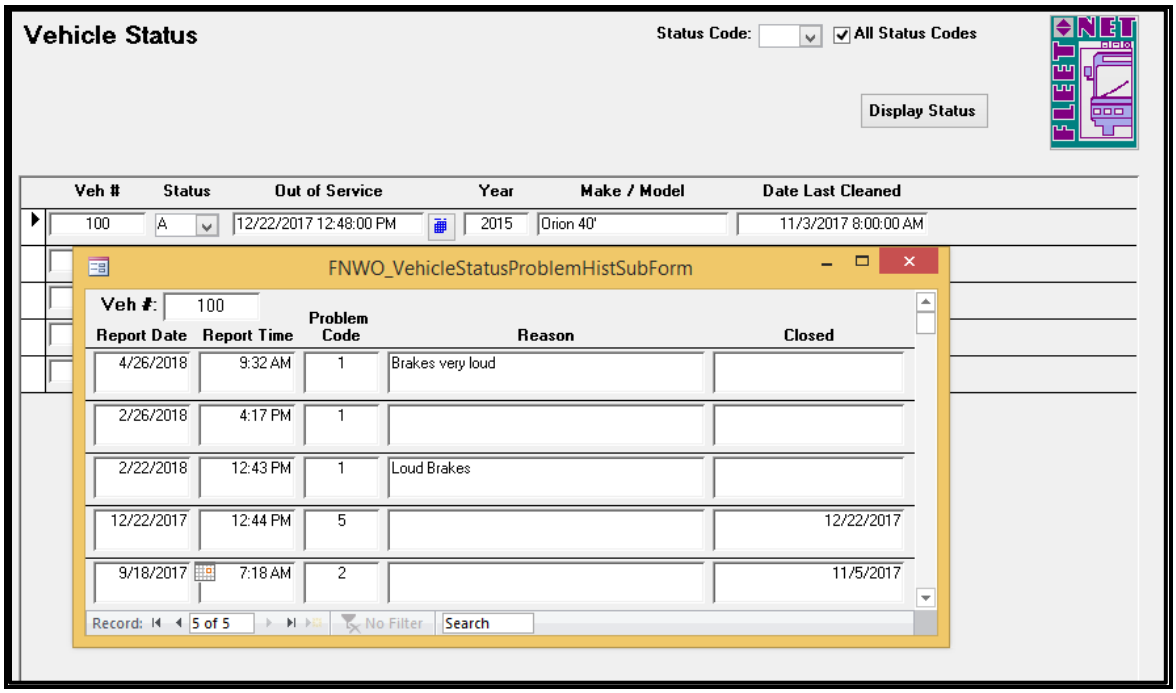
Vehicle Status

This will take you to Vehicle Status in VM. There you can enter the appropriate code (user defined) and see which vehicles that are available or down, etc.



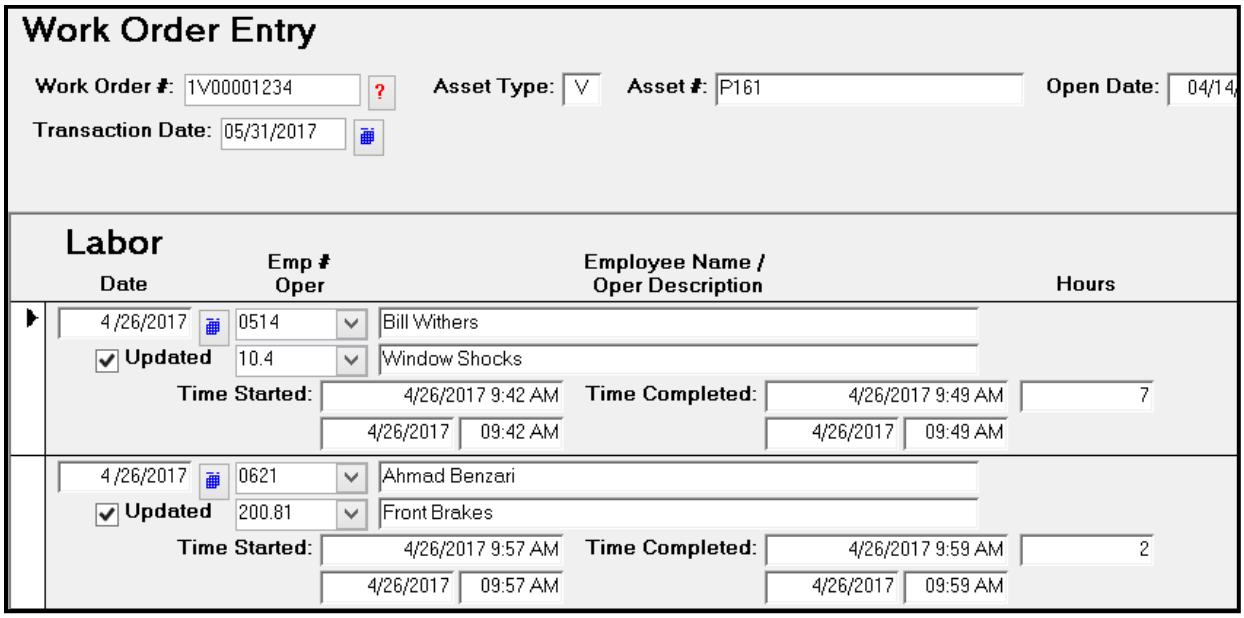


Double click in the vehicle # field. This will bring up a history of the the vehicle problem codes from work orders for the vehicle choosen. If the garage does not use the Problem Code field on the Work Orders, this will return no data.



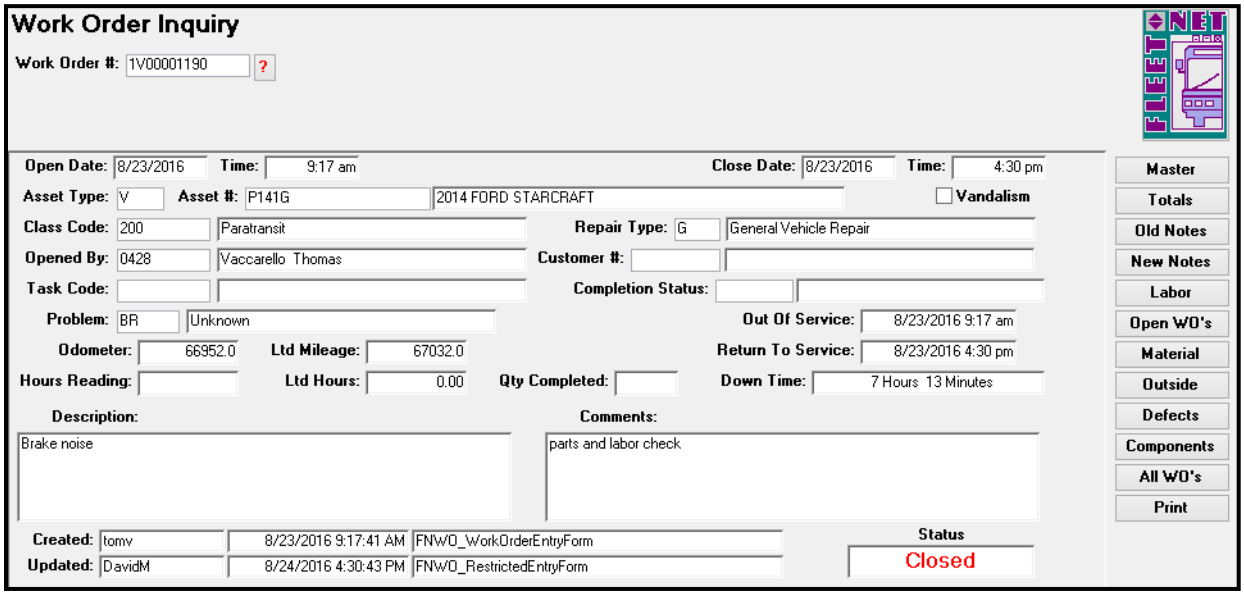
Work Order Entry – Modified Labor Form

This is a version of Work Order Entry #2. The main difference is that it **does not show the Rate on the Labor entry screen**, only the time in and time out and total hours. If a transit is not using Employee Assignments for techs do not clock in and out of work orders, this option could be put on the shop menu for the techs to use. However, in this option, all fields are open to be changed up until the work order is updated.

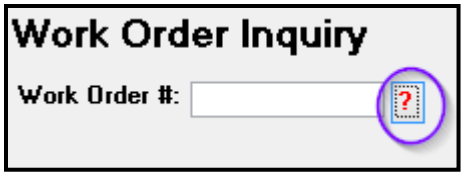


Work Order Inquiry

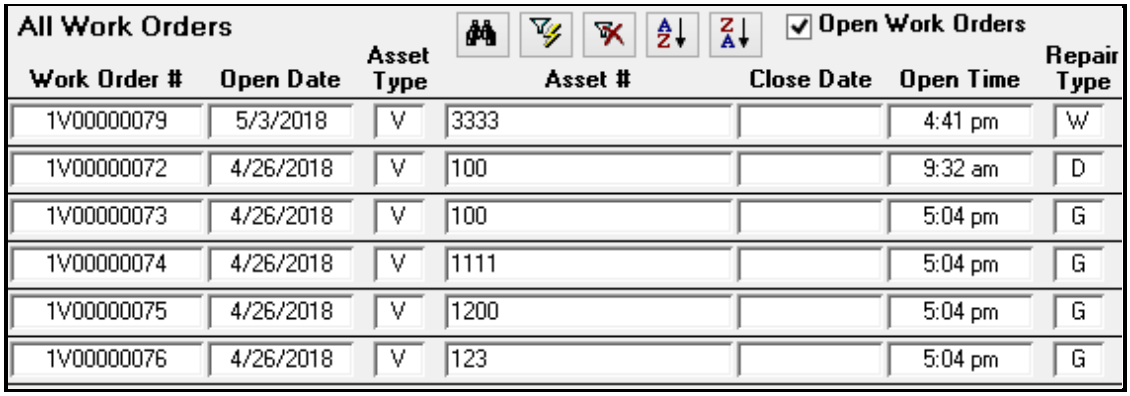
This form is useful for users that should not have access to generating or updating work orders. In this option, data can be viewed but not changed. The sole exception of New Notes, the only button that will allow users to enter data. Note that there are fewer buttons than on Work Order Entry.



To search for a work order, click the  , which displays the All Work Orders sub form. [Note: form must be expanded to view selections].

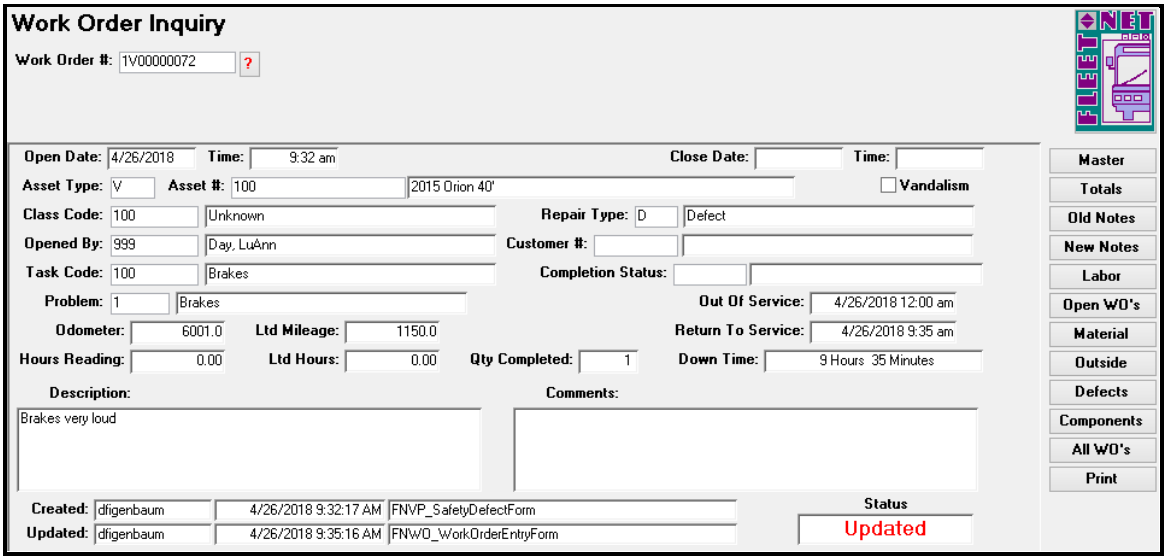


To display only open work orders, check the box next to Open Work Orders. User may choose to search or filter on Work Order #; Open Date; Asset Type; Asset #; Close Date (if check box for Open Work Orders is not selected); or Repair Type using the search/filter selection buttons.

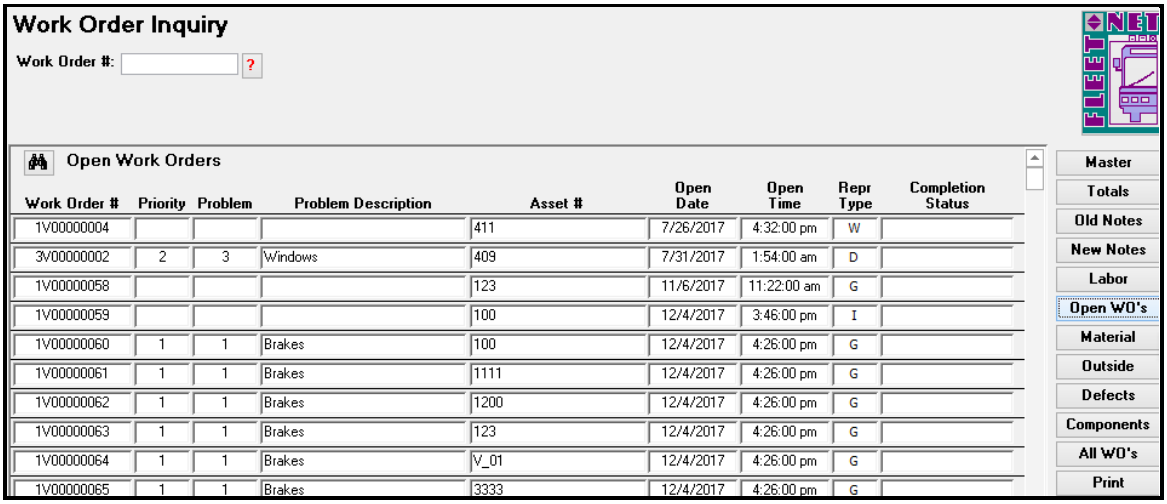


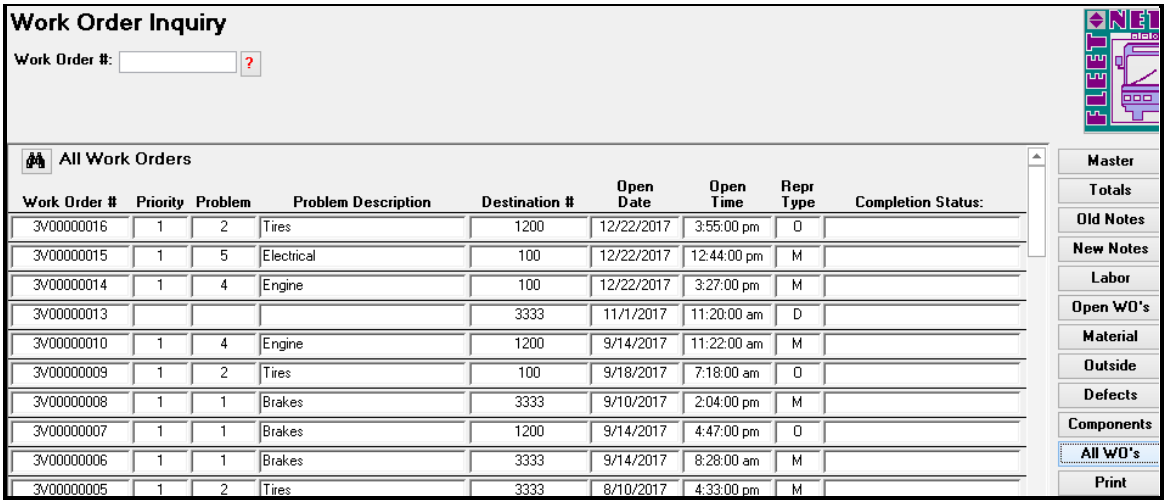
Work Order #	Open Date	Asset Type	Asset #	Close Date	Open Time	Repair Type
1V00000079	5/3/2018	V	3333		4:41 pm	W
1V00000072	4/26/2018	V	100		9:32 am	D
1V00000073	4/26/2018	V	100		5:04 pm	G
1V00000074	4/26/2018	V	1111		5:04 pm	G
1V00000075	4/26/2018	V	1200		5:04 pm	G
1V00000076	4/26/2018	V	123		5:04 pm	G

Double-click on Work Order # to select and review Master WO form.



User can also click ***Open WO's*** to view only Open Work Orders or ***All WO's*** to view all Work Orders in Fleet-Net. Double-click on Work Order # to select and review the WO Master form. *No changes or additions* can be made with the exception of New Notes, which may be added, as needed.

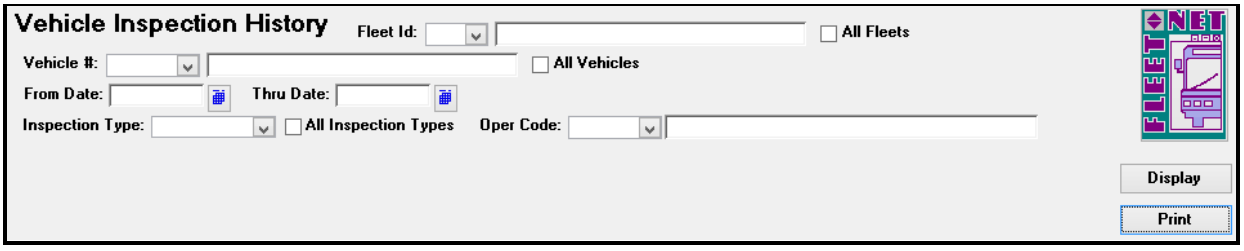




Inspection History

Select ***Inspection History*** to review inspections for selected Fleets or All Fleets based on criteria chosen. Total Inspections, Overdue and % Overdue will be displayed for review.

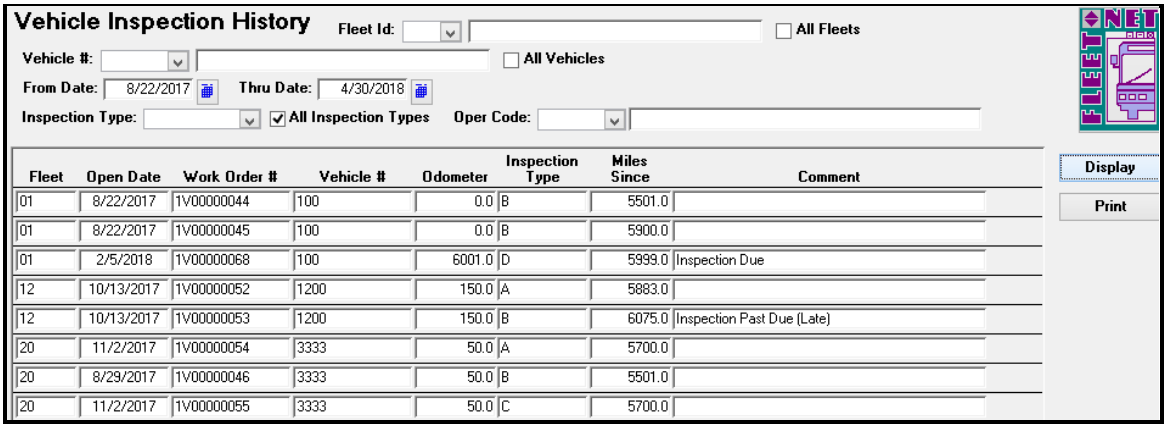
The following form displays.



Field	Description
Fleet Id	Select or enter the Fleet Id. Leave blank to search All Fleets **OR**
All Fleets	Check the box to search All Fleets
Vehicle #	Select or enter Vehicle #
All Vehicles	Check the box to report on all Vehicles
From Date **Thru Date**	Select or enter a date range or leave blank for all dates.
Inspection Type	Select or enter an Inspection Type. Leave blank to search All Inspection Types **OR**
All Inspection Types	Check the box to search All Inspection Types. *[Note: user must enter an Inspection Type or check All Inspection Types checkbox]*
Oper Code	Select or enter an Operation Code or leave blank to search All Operation Codes. *[Note: user must enter either an Inspection Type or an Oper Code]*

Display

Click ***Display***, the following form displays based on the search criteria selected.

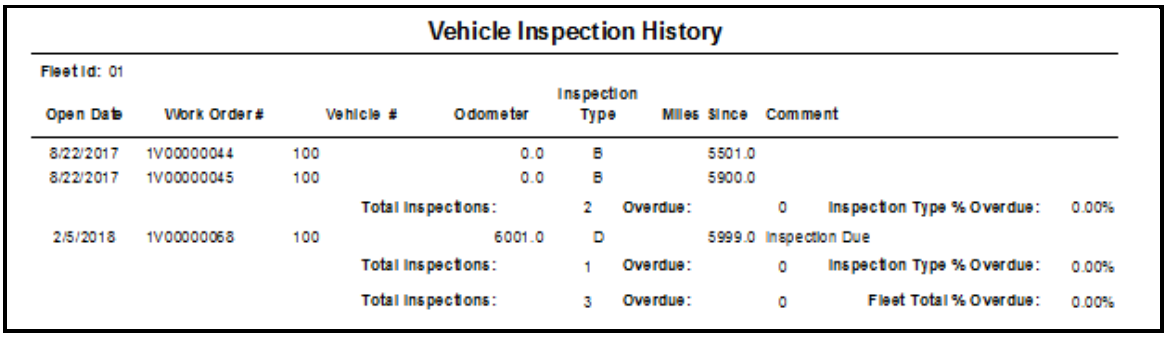


Fleet	Open Date	Work Order #	Vehicle #	Odometer	Inspection Type	Miles Since	Comment
01	8/22/2017	1V00000044	100	0.0	B	5501.0	
01	8/22/2017	1V00000045	100	0.0	B	5900.0	
01	2/5/2018	1V00000068	100	6001.0	D	5999.0	Inspection Due
12	10/13/2017	1V00000052	1200	150.0	A	5883.0	
12	10/13/2017	1V00000053	1200	150.0	B	6075.0	Inspection Past Due (Late)
20	11/2/2017	1V00000054	3333	50.0	A	5700.0	
20	8/29/2017	1V00000046	3333	50.0	B	5501.0	
20	11/2/2017	1V00000055	3333	50.0	C	5700.0	

Field	Description
Comment	Displays the Comment indicating an inspection due or past due at the time the work order was generated
Total Inspections	Displays the Total Inspections based on selected search criteria
Overdue	Automatically populates number of Inspections Overdue based on selected search criteria
% Overdue	Automatically populates a calculated field of the percentage of Overdue Inspections based on selected search criteria

Print

Select ***Print*** to review Inspection History report based on selected criteria. To print a hard copy of report, use toolbar features. Below is a sample report.

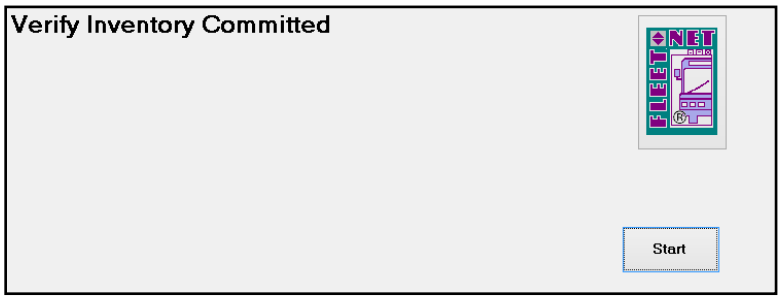


Vehicle Inspection History

Fleet Id: 01

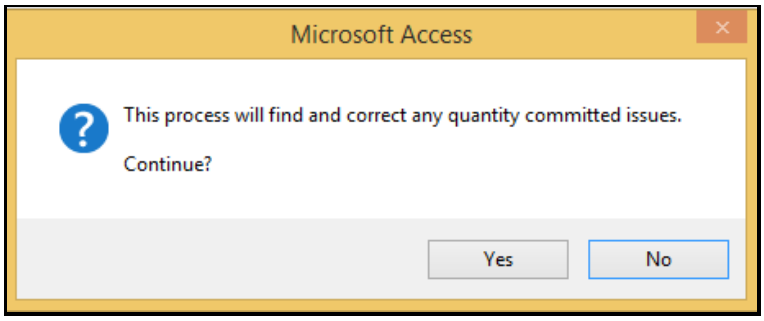
Open Date	Work Order #	Vehicle #	Odometer	Inspection Type	Miles Since	Comment
8/22/2017	1V00000044	100	0.0	B	5501.0	
8/22/2017	1V00000045	100	0.0	B	5900.0	
		Total Inspections:	2	Overdue:	0	Inspection Type % Overdue: 0.00%
2/5/2018	1V00000068	100	6001.0	D	5999.0	Inspection Due
		Total Inspections:	1	Overdue:	0	Inspection Type % Overdue: 0.00%
		Total Inspections:	3	Overdue:	0	Fleet Total % Overdue: 0.00%

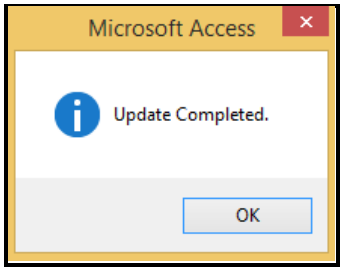
Fix Incorrect Committed Parts



This form will correct any work orders with negative numbers on the inventory line items. This will change them to the numbers that match what is on the work order or to 0, depending on the work order. This affects work orders that have not been updated yet.

The following message will display when user clicks ***Start***.





Parts Catalog

Fleet-Net Parts Catalog is a feature that allows users, primarily maintenance staff, to check inventory stock for parts, add parts to a work order, and order parts.

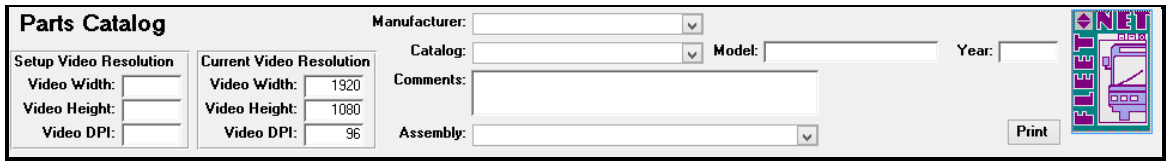
The Parts Catalog uses data from the Inventory (IN) and Work Order (WO) modules. A folder named PartsCatalog will have to be added to the network. This folder will contain pictures, the manufacturers' catalog and various htm/web pages.

The fleet's manufacturers' catalog is required before this feature can be utilized.

Fleet-Net technicians use the fleet's manufacturers' catalog to build the Parts Catalog. OEM numbers, descriptions, quantities, and other fields are setup during this process.

Utilizing the Parts Catalog form, users also have an option to use a 'Hot Spot' feature. The 'Hot Spot' is another feature that is setup by a Fleet-Net technician that will allow users the option to click on the part they want from a picture rather than using the parts list.

Please refer to the Parts Catalog User Guide for implementation and complete instructions.

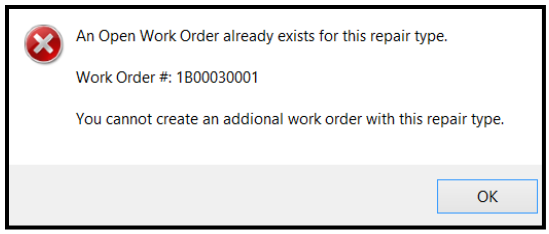


Restricted Work Order Entry Form

The purpose of this work order entry menu is to keep from generating a duplicate Work Order with the same Location, Asset Type, Asset Number and Repair Type. This will not allow users to create these duplicates, but the rest of the entry is the same as the Work Order Entry (Menu Option #2). This is generally assigned to techs who create work orders, when not using Employee Assignment.

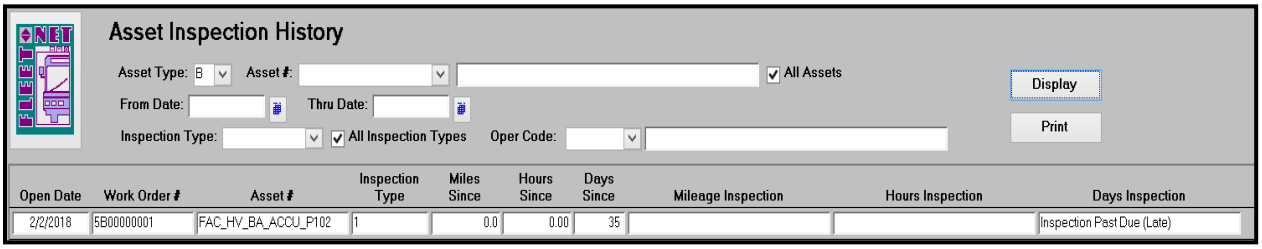
Work Orders generated from Vehicle Problems (Road Calls and Safety Defects) or Inspection Planning PM Checklist will still allow work orders to be generated without the Location, Asset Type, Asset Number and Repair Type being unique.

The process for creating work orders is the same. Should there be an Open Work Order with the same selections (Location, Asset Type, Asset #, and Repair Type) the following message displays.



Inspection History - Assets

Select Inspection History from the main WO menu to review Non-Vehicle inspections for a selected Asset Type based on criteria chosen. This report can be generated for a specific asset or all Assets for the specified type. The following form displays.



Field	Description
Asset Type	Select or enter an Asset Type. C = Components; or another Asset setup in the Asset Maintenance module
Asset #	Select or enter Asset #.
All Assets	Check the box to search All Assets.
From Date **Thru Date**	Select or enter a date range or leave blank for all dates.
Inspection Type	Select or enter an Inspection Type. Leave blank to search All Inspection Types **OR**
All Inspection Types	Check the box to search All Inspection Types. *[Note: user must enter an Inspection Type or check All Inspection Types checkbox]*
Oper Code	Select or enter an Operation Code or leave blank to search All Operation Codes. *[Note: user must enter either an Inspection Type or an Oper Code]*

Display

Based on the criteria selected, all inspections are displayed with Fleet ID, Open Date, Work Order #, Vehicle #, Odometer, Operation Code, Inspection Type, Miles Since the last inspection.

Field	Description
Comment	Displays the Comment indicating an inspection due or past due at the time the work order was generated
Total Inspections	Displays the Total Inspections based on selected search criteria
Overdue	Automatically populates number of Inspections Overdue based on selected search criteria
% Overdue	Automatically populates a calculated field of the percentage of Overdue Inspections based on selected search criteria

Print

Select ***Print*** to review Asset Inspection History report based on selected criteria. To print a hard copy of report, use toolbar features. Below is an example report.

Sample Transit

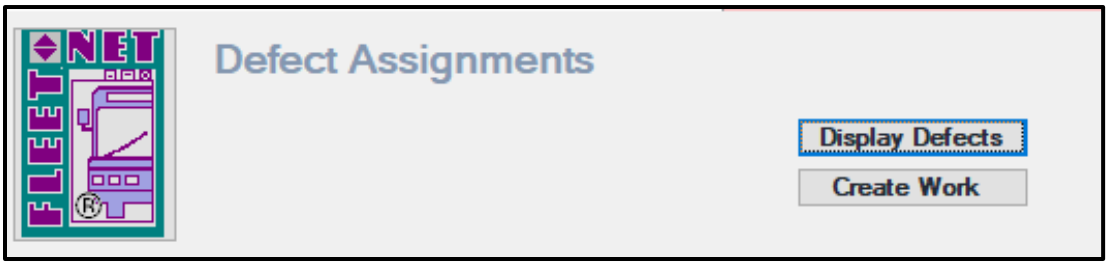
Asset Inspection History

Asset Type: C Components

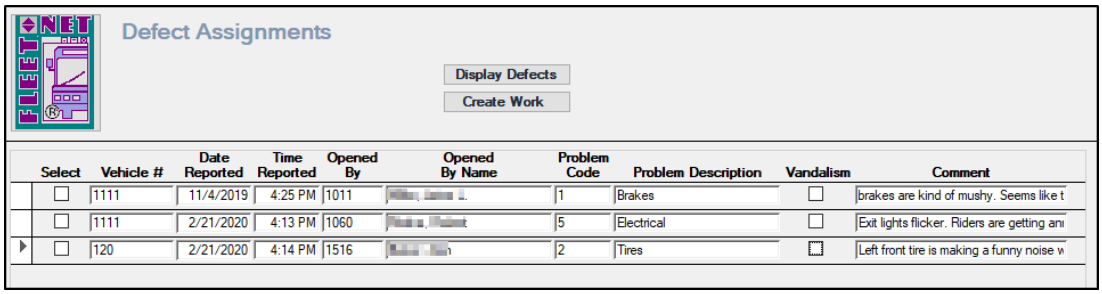
Open Date	Work Order #	Asset #	Inspection Type	Days Since	Hours Since	Miles Since	Days Inspection	Hours Inspection	Mileage Inspection
8/20/2012	1C00000129	88888	1	0.0	0	49,160			
8/22/2012	1C00000133	99999	1	0.0	0	49,800			
						Total Inspections:	2 **Overdue:**	0 **Inspection Type % Overdue:**	0.00%
8/22/2012	1C00000134	SF CNG Station TP	ASF	316.0	0	0	Inspection Past Due (Late)		
8/22/2012	1C00000135	SF CNG Station Indio	ASF	316.0	0	0	Inspection Past Due (Late)		
						Total Inspections:	2 **Overdue:**	2 **Inspection Type % Overdue:**	100.00%
8/22/2012	1C00000136	SF Hydrogen Station	SFA	316.0	0	0	Inspection Past Due (Late)		
						Total Inspections:	1 **Overdue:**	1 **Inspection Type % Overdue:**	100.00%
						Total Inspections:	5 **Overdue:**	3 **Asset Type Total % Overdue:**	60.00%
						Total Inspections:	5 **Overdue:**	3 **Report Total % Overdue:**	60.00%

Defect Assignments

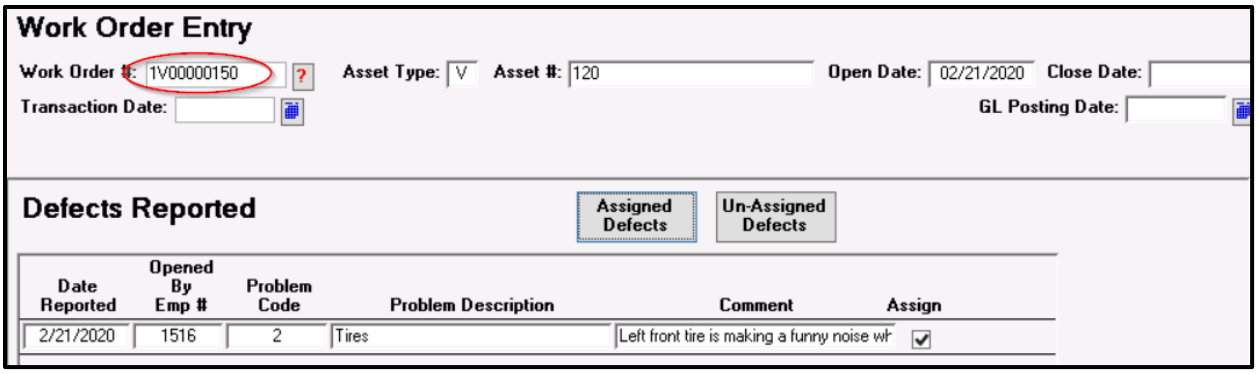
Deferred Defects are entered via the Vehicle Problems module. Then they are assigned to work orders so they can be repaired. Here unassigned defects can be viewed, and if desired, a work order can be created so the repairs can be completed on them.



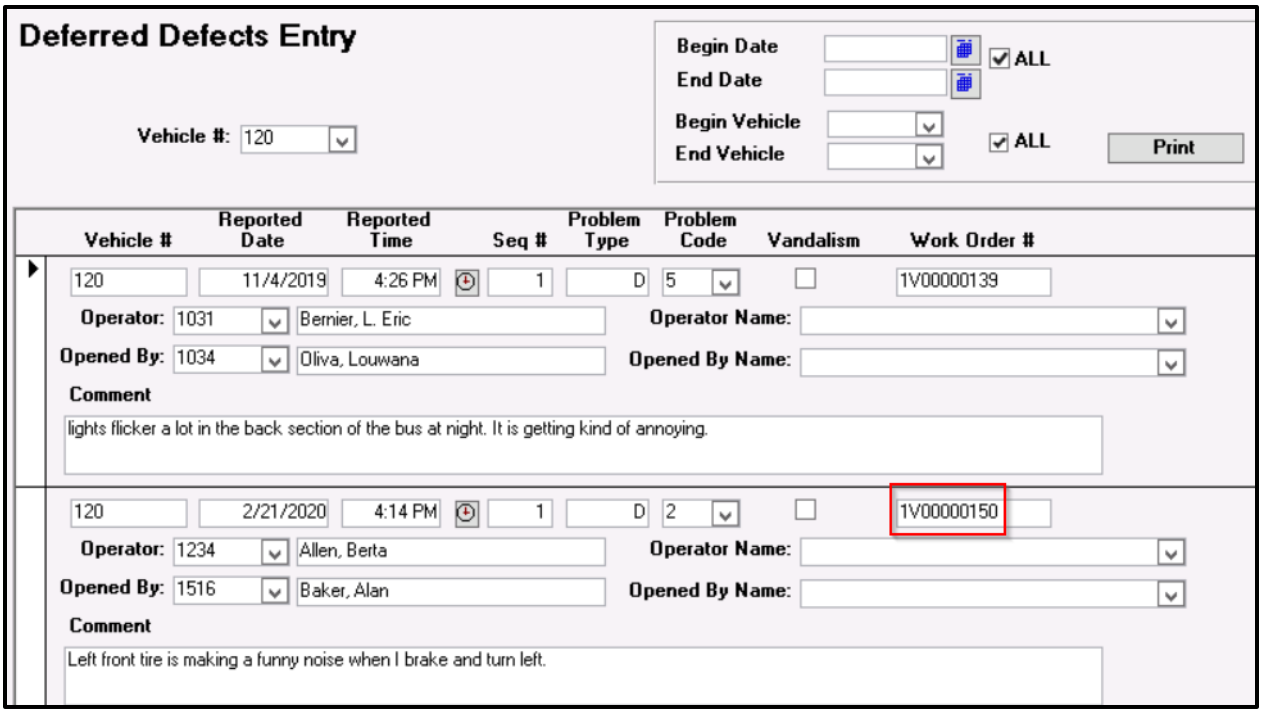
Click ***Display Defects*** and the following displays.



Click the Select Box on the left to choose any of the defects or leave blank to choose all the defects. Click ***Create Work***. System will ask for Location (the first digit of the Work Order # to be created). The system will create one WO for each defect. These can now be viewed in Work Order Entry and Work Assignment. Here is the WO for Vehicle 120 noted above.

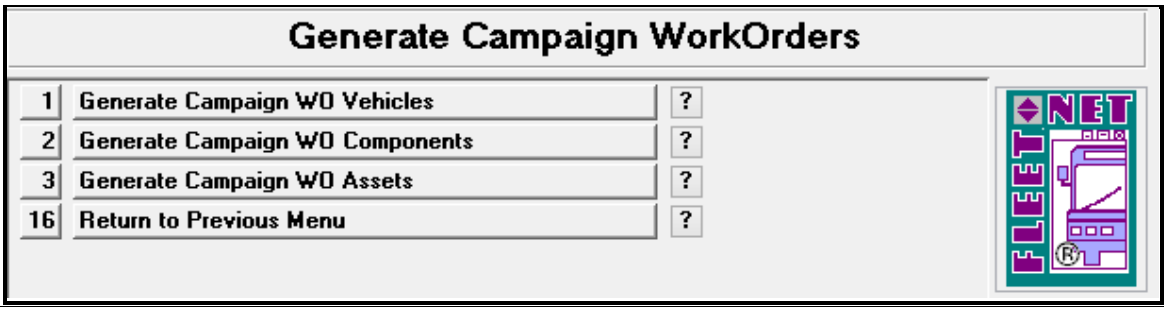


The Vehicle Problems module will now reference the WO # as well.



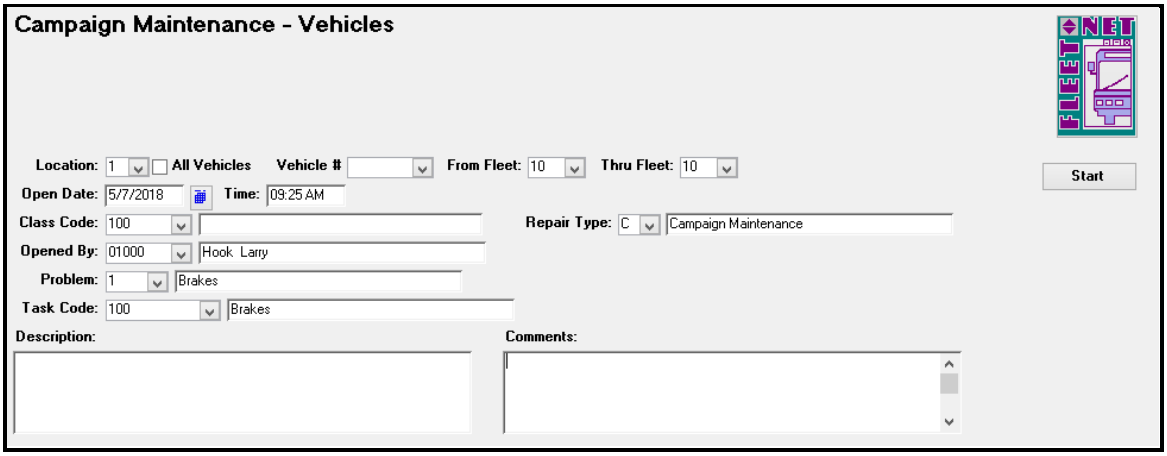
Generate Campaign Work Orders

Campaign work orders can be created for a fleet or for all vehicles at once. For instance, at the end of spring, user wants to create a work order for each vehicle to check their A/C units before the summer heat descends.



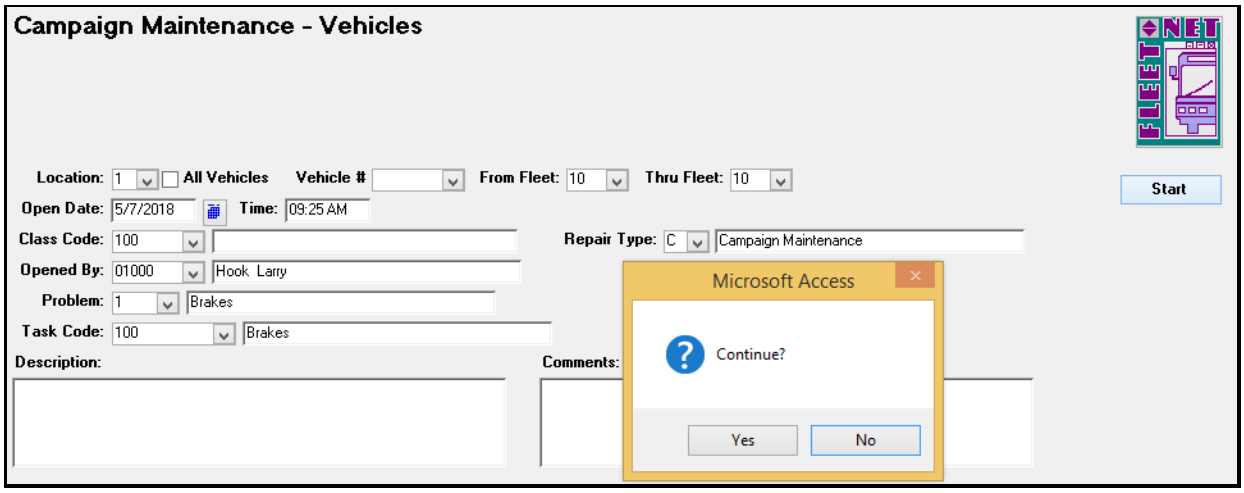
Generate Campaign WO Vehicle

Used to generate Campaign Work Orders for All Vehicles, specify one vehicle, a Fleet or range of Fleets

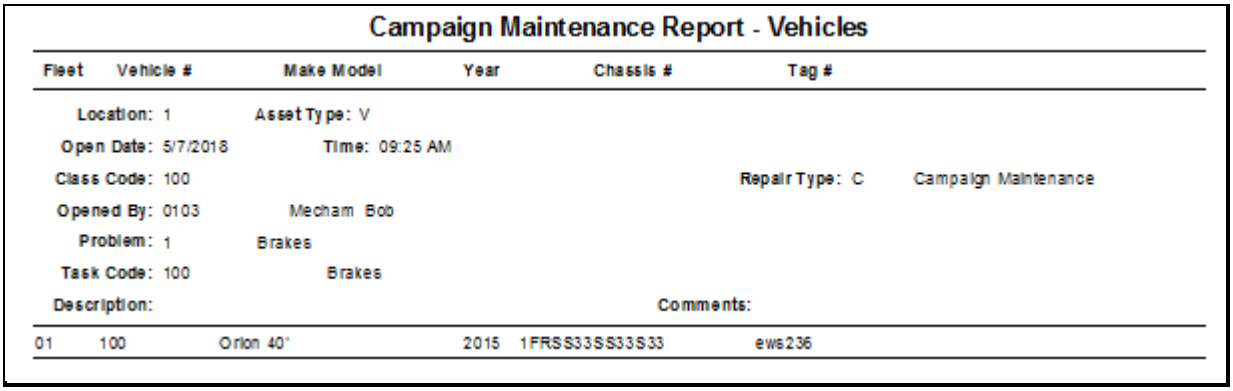


Field	Description
Location	Select the location where Work Order Campaign will be performed. This is required to generate the Work Order The location code becomes the first character of the work order #
All Vehicles **Vehicle #** **From Fleet Thru Fleet**	Select All Vehicles. Or the user can specify a vehicle or enter a Fleet range
Open Date Time	Click the calendar icon and the current date and time is populated or manually enter the date and time
Class Code	Select the applicable class code setup via **'Modify/Add Class Codes'**. The Class Code selected determines which GL journal entries are generated for material, labor, billing, and outside services.
Opened By	Select the employee number of the person generating the work order.
Repair Type	**C** – Campaign Maintenance
Problem	Enter or select from the drop-down list a problem code. (Optional)
Task Code	Select the task code from the drop-down list (setup via **Modify/Add Tasks**). The task code is used to calculate the estimated costs based on the material and operation code assigned to the task. (Optional)
Description	Enter the description of the work assignment – Enter any additional comments
Comments	

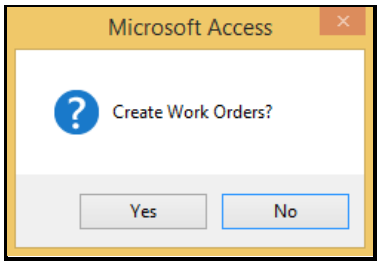
Click ***Start*** to generate the Work Orders.



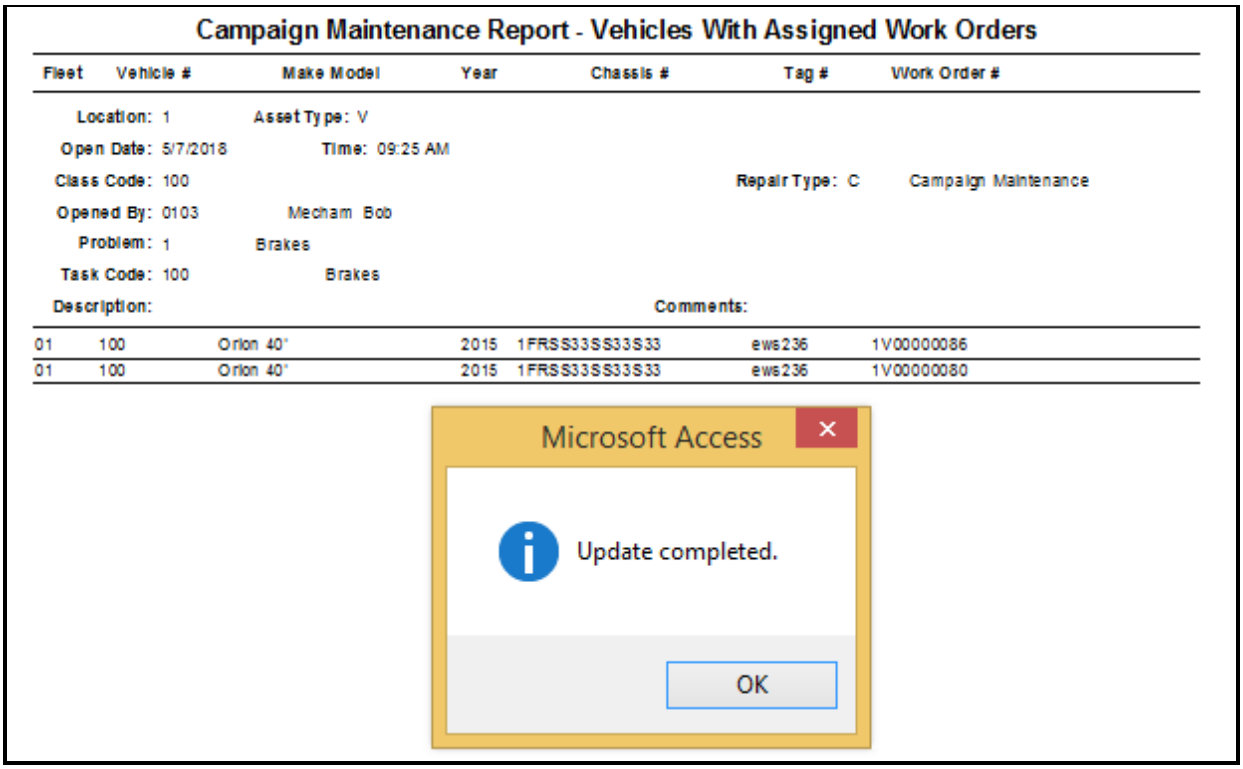
The following report is displayed.



The user should review the report. When they click to close it, the following confirmation message displays.



The following report displays with the assigned work order numbers to the right.



This is the same process that the user will use to create WO's for **Components and Assets.**

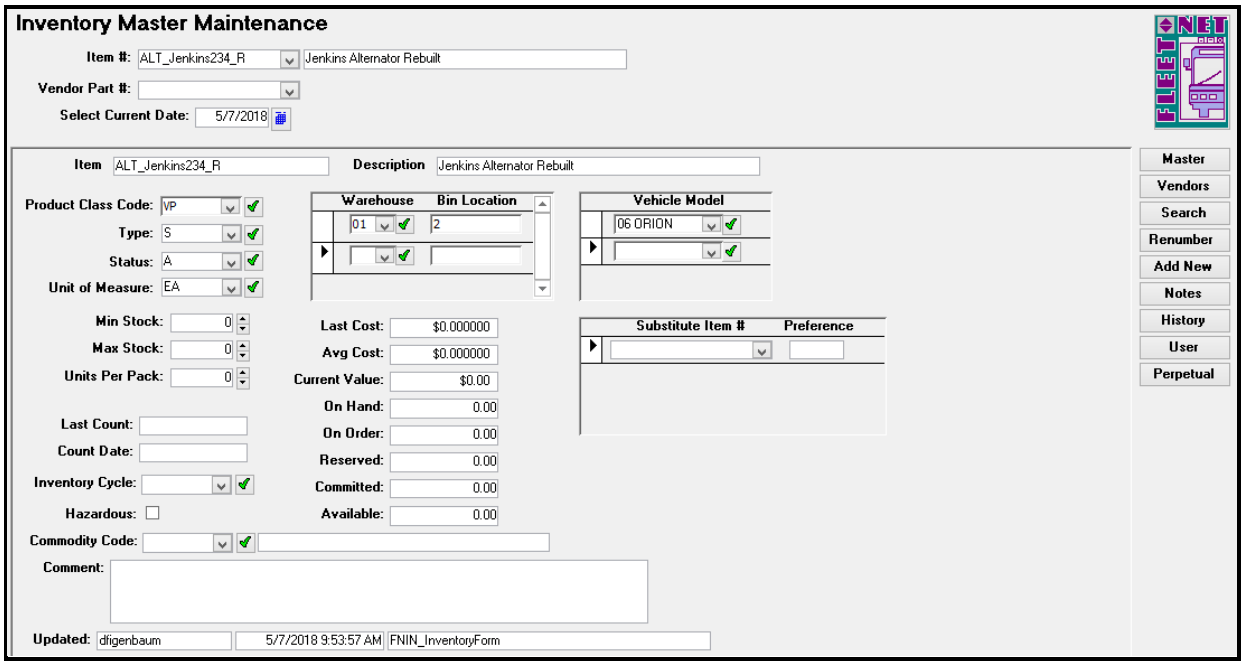
Work Order Repair Types

Inventory Rebuild Work Orders

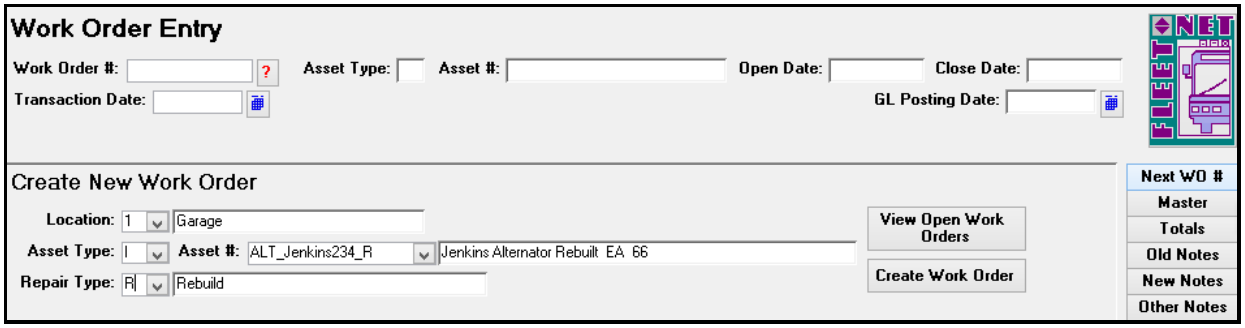
Following the steps below will guide user through creating a rebuilt inventory item, assigning the rebuild to a Work Order and updating the entire process.

1. Create a rebuild inventory item number (IN02 #1). FNC recommends the item number end with the letter **'R'** to identify and distinguish the rebuilt part from the standard numbering convention for regular inventory items. The **Last Cost**, **Avg Cost**, **Current Value**, **On Hand**, and **Available** fields of the rebuilt part will be generated when Labor and Material entries are created through the WO process. The example below is **prior** to completing the process in which the work order will be Closed and all values Updated.

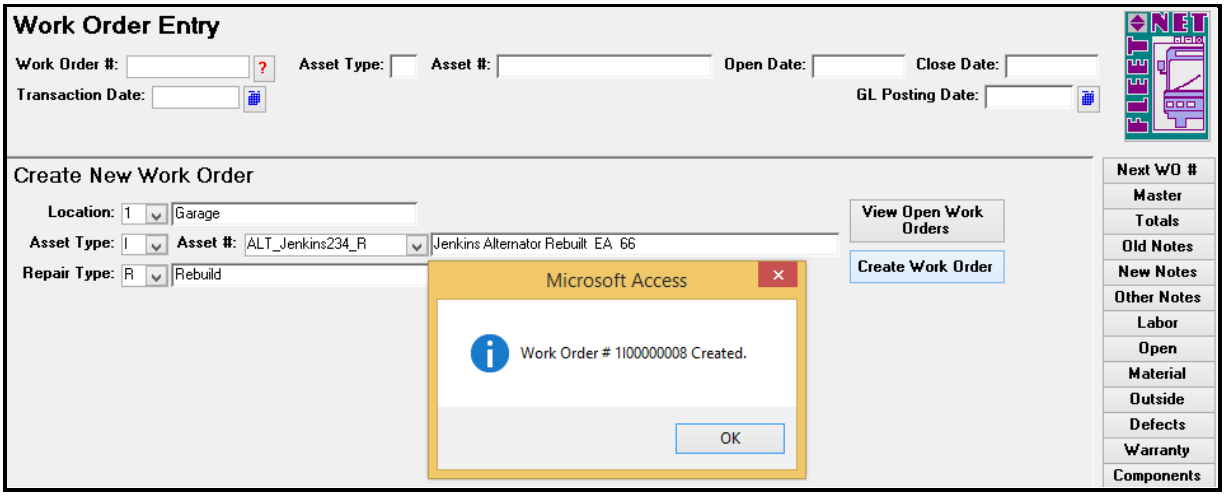
This will create a finished good. EXAMPLE: creating kits from inventory parts or rebuilding parts using stocked parts.



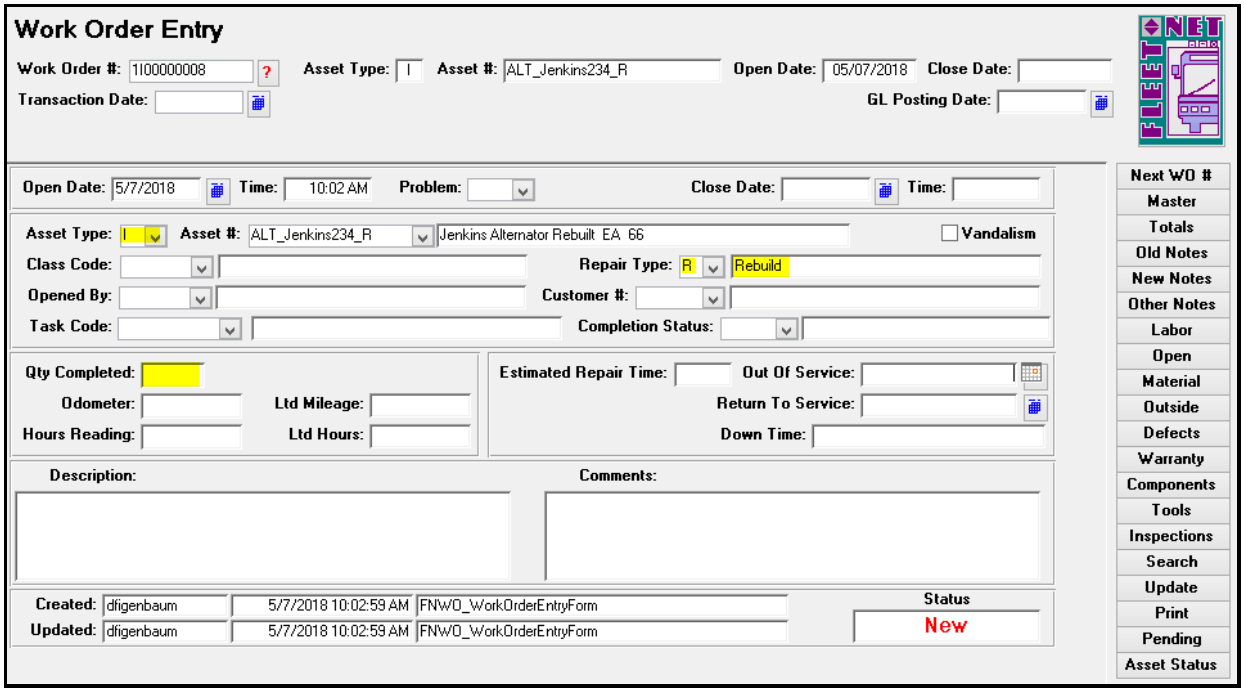
Create an Inventory Work Order through Work Order Entry. Select Location and Asset Type. Work Orders created for a rebuild item **MUST** select the Asset Type of **I = Inventory.**



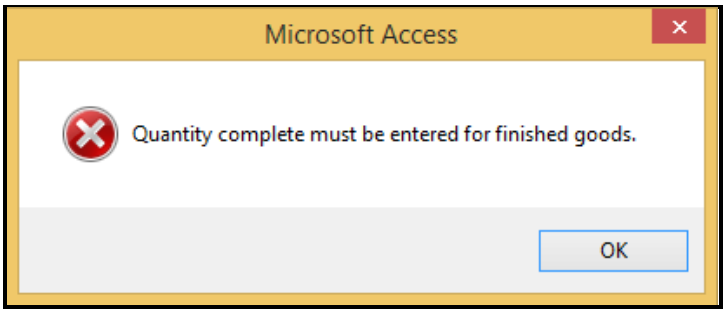
Selecting Location 1 and Asset Type **I** above means the Work Order number will begin with 1I. Select Repair Type **R** for Rebuilds. When reviewing reports by Repair Type, Rebuild Work Orders are also more easily identified.



When an Asset Type **I** = Inventory Work Order is created, the **Qty Completed** must be entered **before** the work order is Closed, which will increase the inventory quantity **On Hand**.



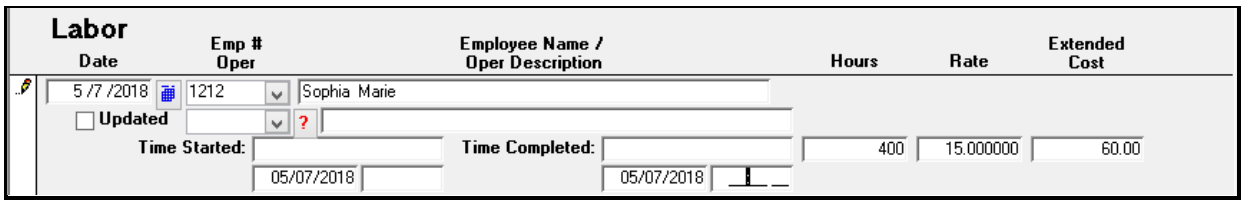
If **Qty Completed** is not entered, the work order cannot be closed. The following message displays.

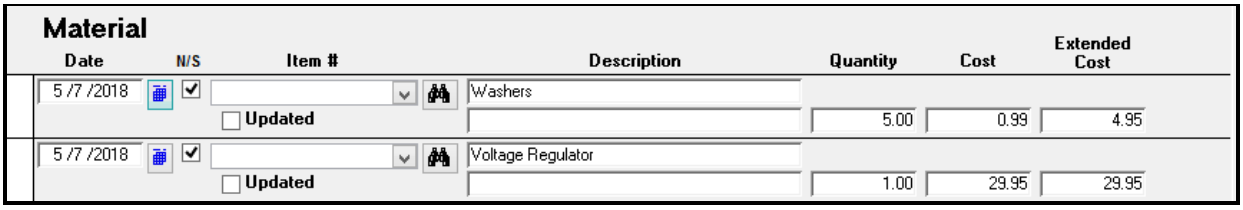


Click OK and enter the **Qty Completed**.

All Labor and Material will be added to the cost of the rebuild part along with any Labor and Material Overhead associated with the WO Class Code used on the rebuild Work Order.

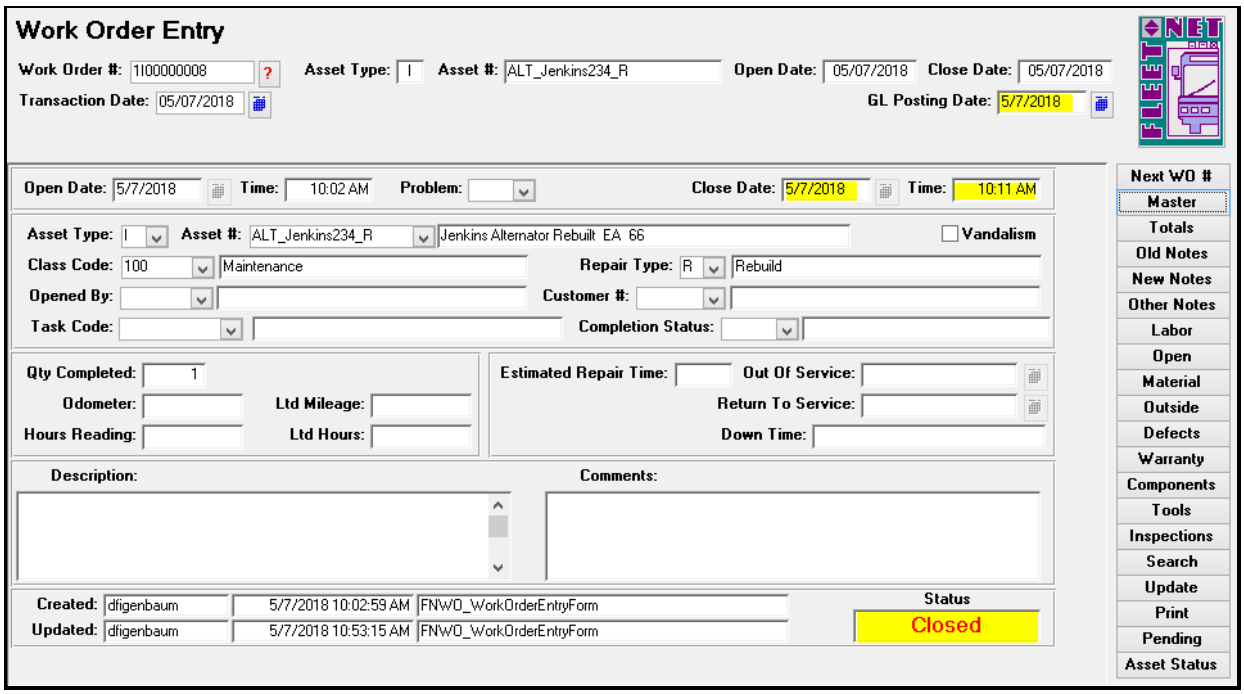
Note: Qty Completed, Labor and Material MUST be entered. Work Order MUST be Closed and Updated in order for the rebuild part to reflect properly in Inventory Master. Once a Rebuild Work Order is Closed and Updated, Labor and Material costs can no longer be added to the Finished Good.





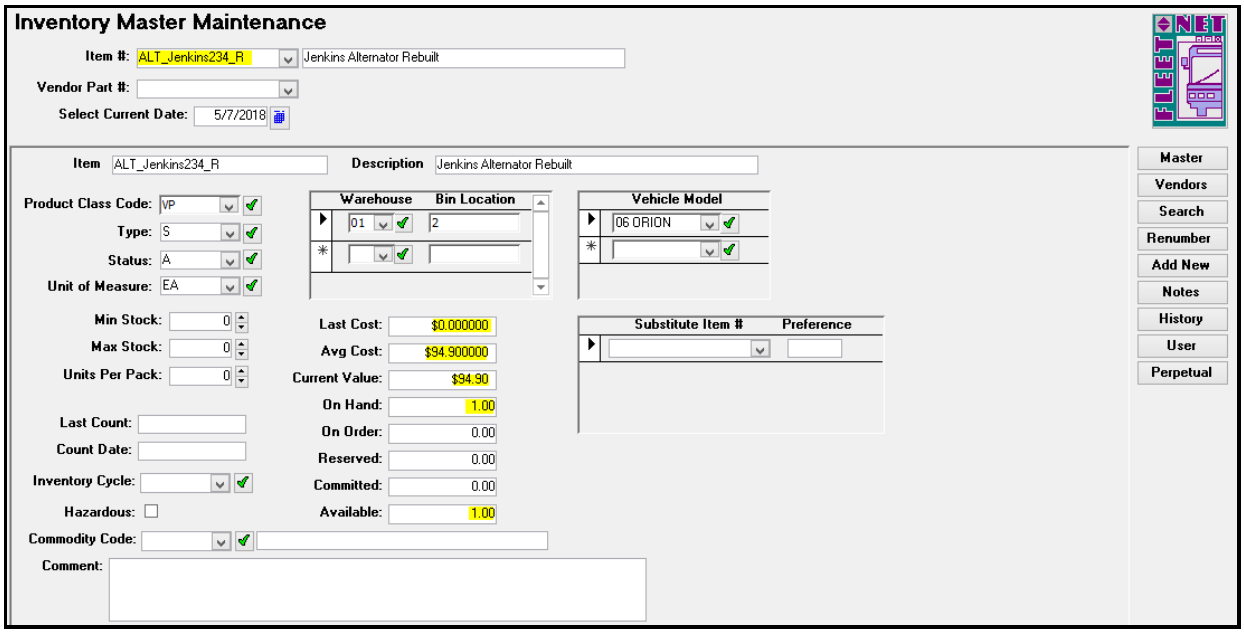
Note: If it is determined that the Rebuild cannot be completed, zero can be entered in the Qty Completed field. If materials had been previously updated on the Inventory Work Order, negative entries must be entered for all parts being returned to inventory.

Enter or select the **GL Posting Date**, **Close Date,** and select **Update** to close the work order. Closing the work order increases the Inventory quantity **On Hand** for the rebuild part.



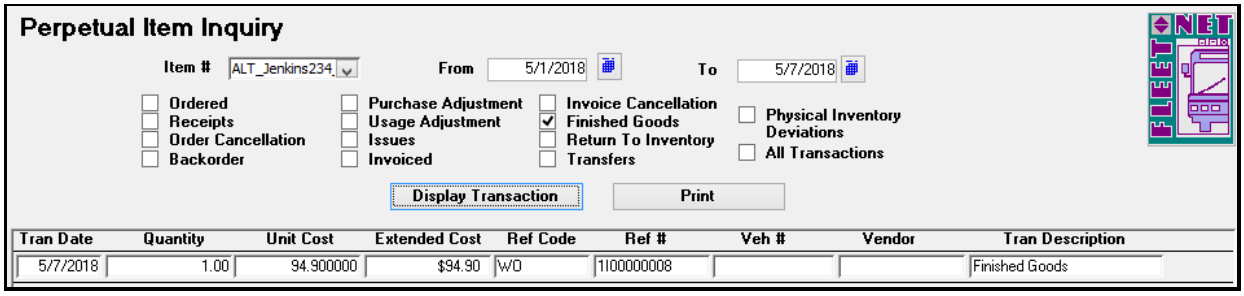
As with all type of work orders, during the Update process, the Work Order Update GL Distribution Audit Report is displayed for review and/or printing. The audit report displays all Material associated with the Inventory Work Order generated for the rebuilt inventory item.

The example below displays the rebuilt part in Inventory now with associated cost. The rebuilt part can be issued on a work order.

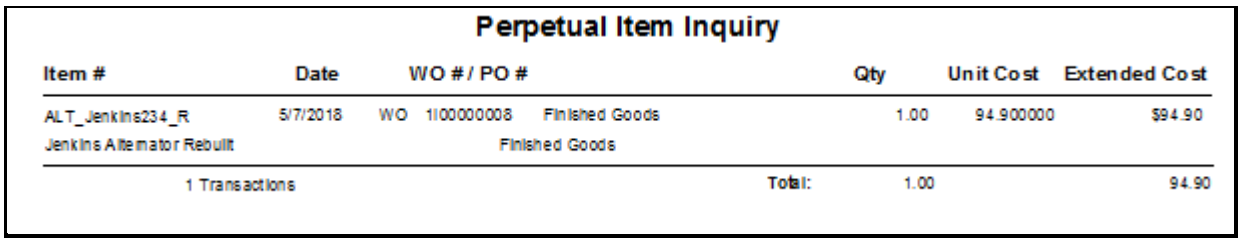


To setup a rebuilt part as a Component for tracking, see the **Components** section of this user guide. To assign the rebuilt part to a vehicle model, select the **Vehicle Model** from the drop-down list. This field can be used to identify the specific vehicle model(s) on which this rebuild part can be installed.

Select ***Perpetual*** to review item displayed as Finished Goods in the **Tran Description** field. **Perpetual Item Inquiry** (IN01 #2) can also be used to review Inventory rebuild item as Finished Goods.

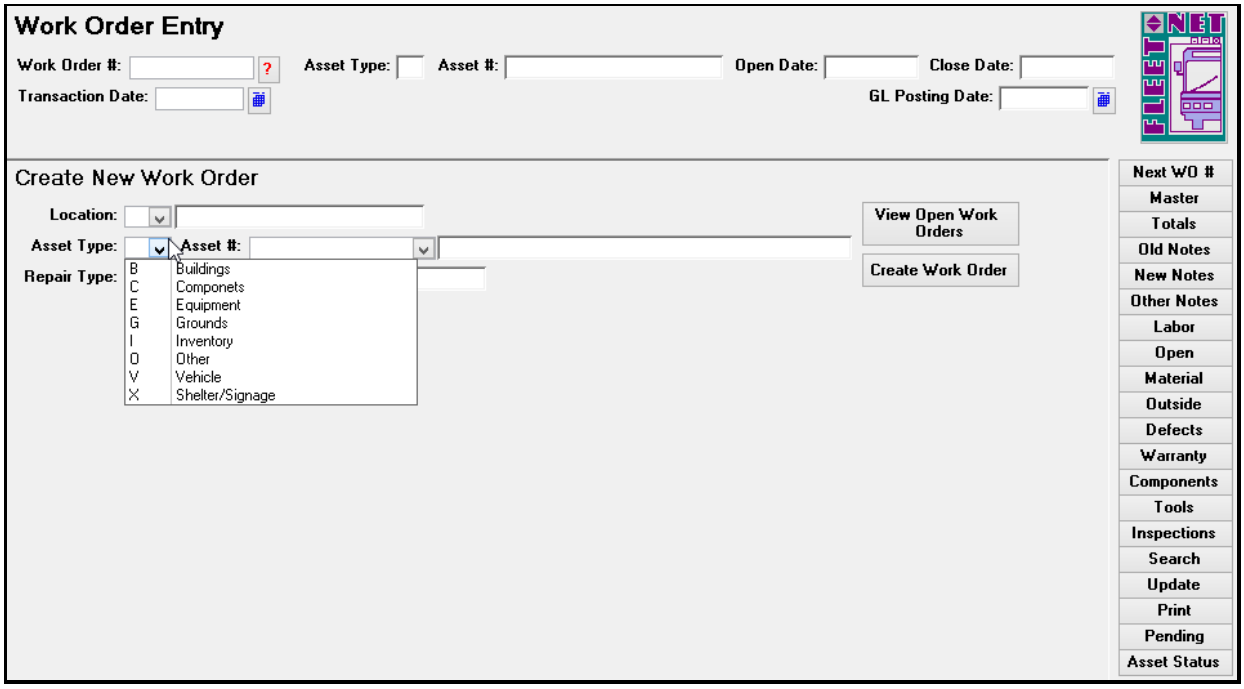


Select ***Print*** to review and/or print the Perpetual Item Inquiry report. See the following example.

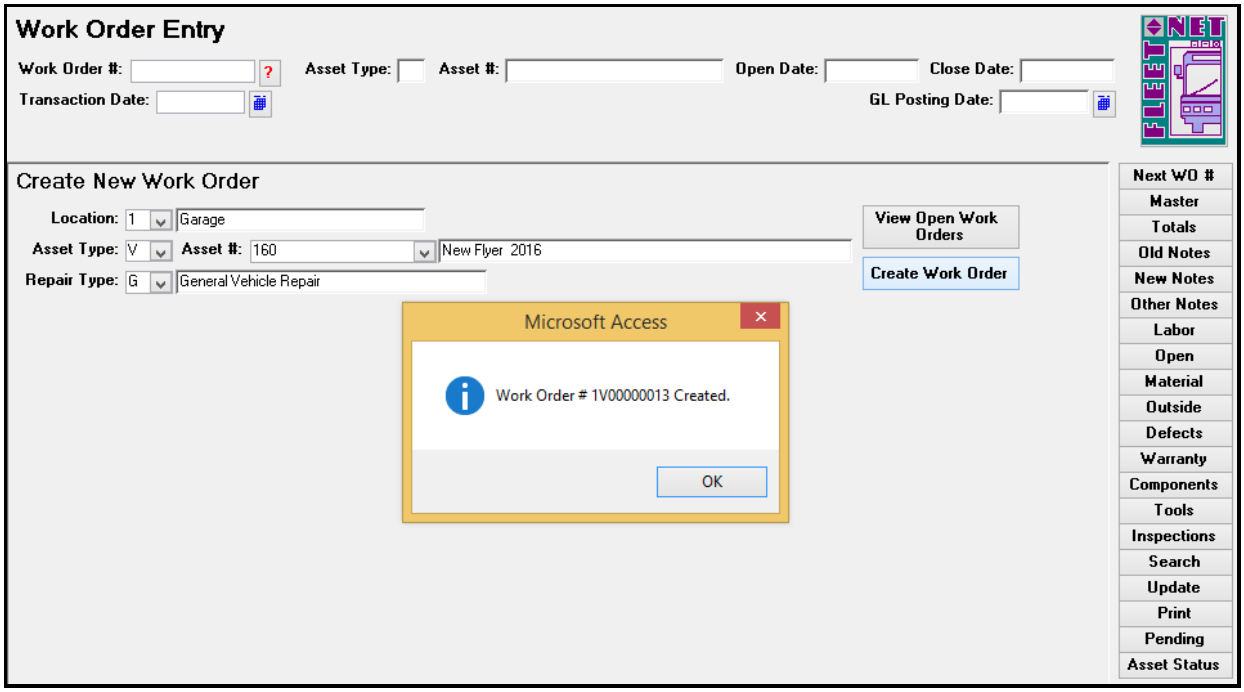


To Install or Remove Components from Vehicle Work Orders

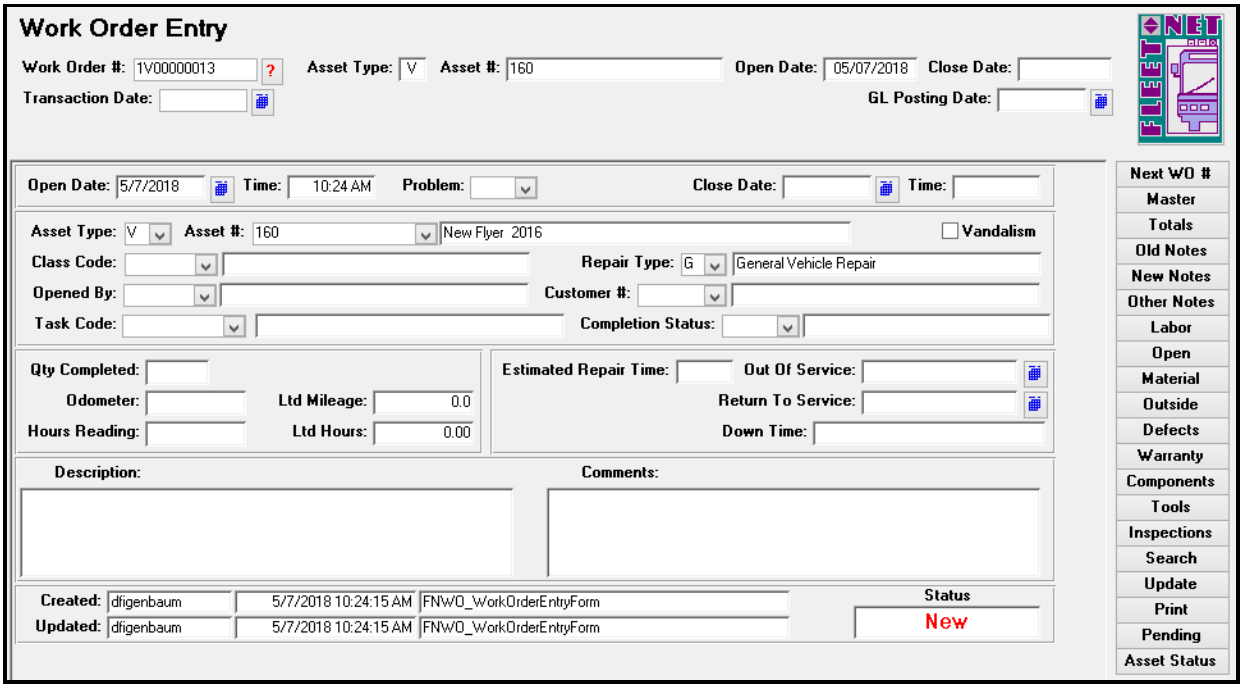
Open a new work order, select **V** = Vehicle for **Asset Type** to install or remove a component on a vehicle.



Enter Asset Type, Asset Number, Class Code, Opened By, and select **G** = General Repair for **Repair Type**.

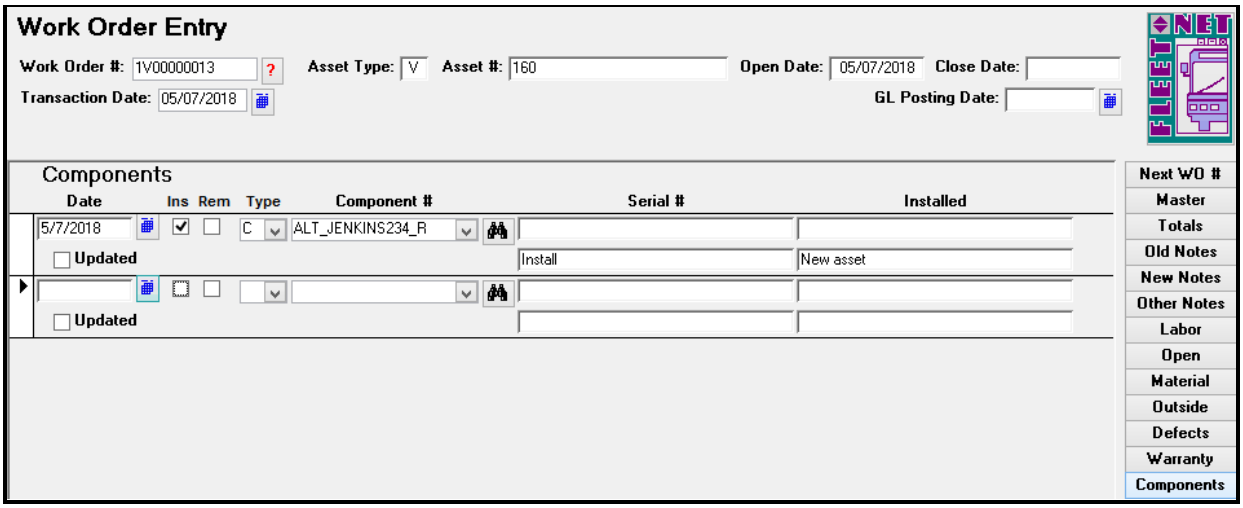


Click ***OK*** to generate new work order.

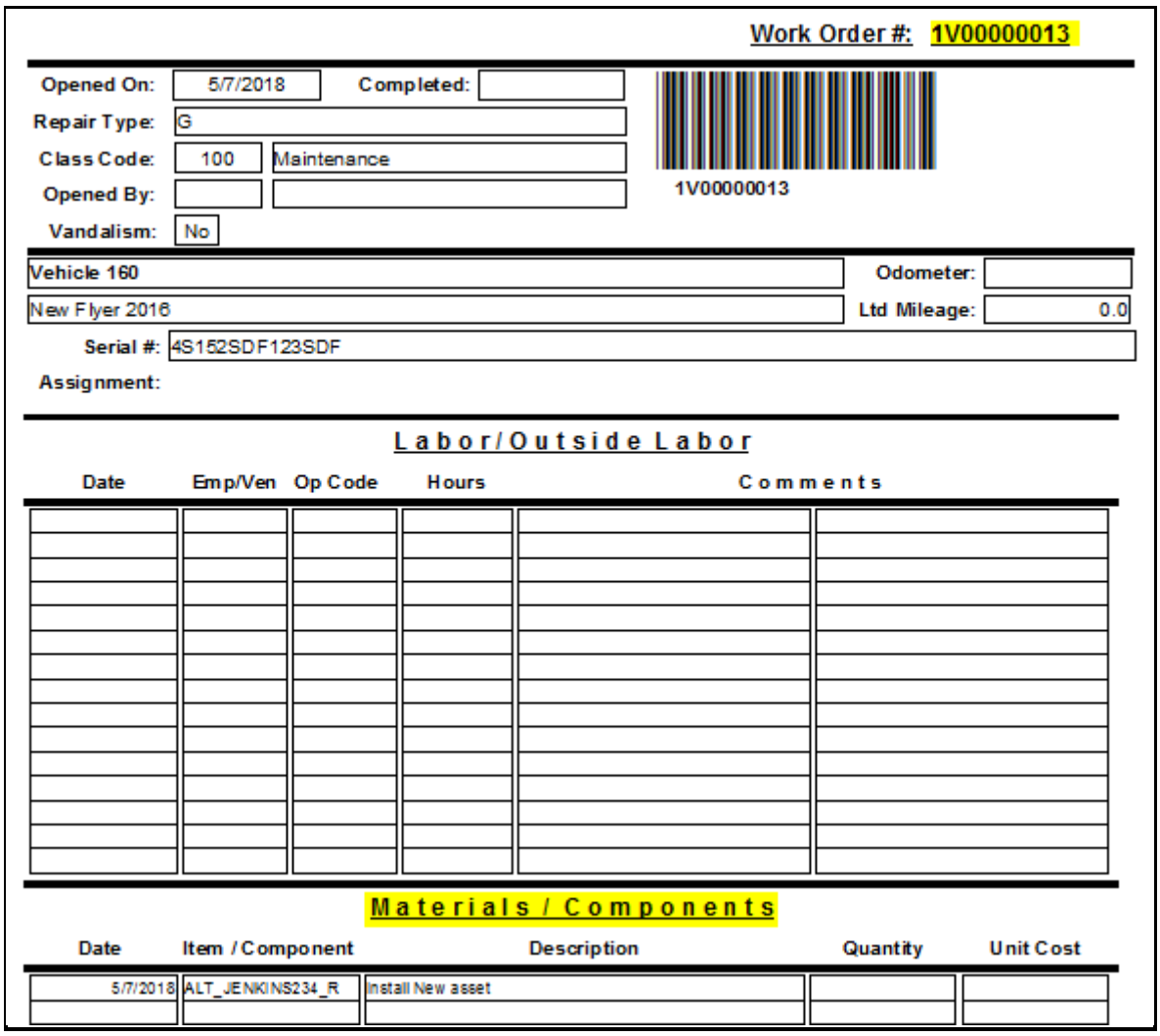


Click ***Component*** and select the component from the drop-down list. Check ***Install*** to install the component.

Component MUST be setup in VM Modify /Add Components Maintenance first.



Components that are being installed or removed will appear in the Materials/Components section of the Work Order when it is printed.



Work Order #: 1V00000013

Opened On: 5/7/2018 Completed:
Repair Type: G
Class Code: 100 Maintenance
Opened By:
Vandalism: No

1V00000013

Vehicle 160 Odometer:
New Flyer 2016 Ltd Mileage: 0.0
Serial #: 4S152SDF123SDF
Assignment:

Labor/Outside Labor

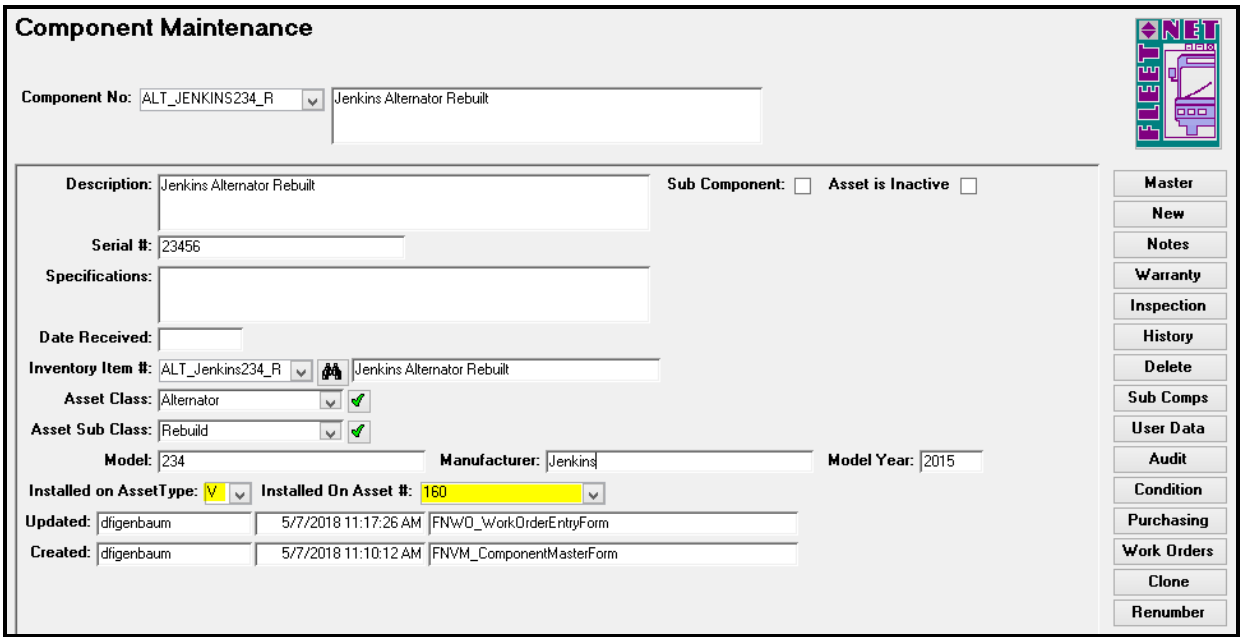
Date	Emp/Ven	Op Code	Hours	Comments	

Materials / Components

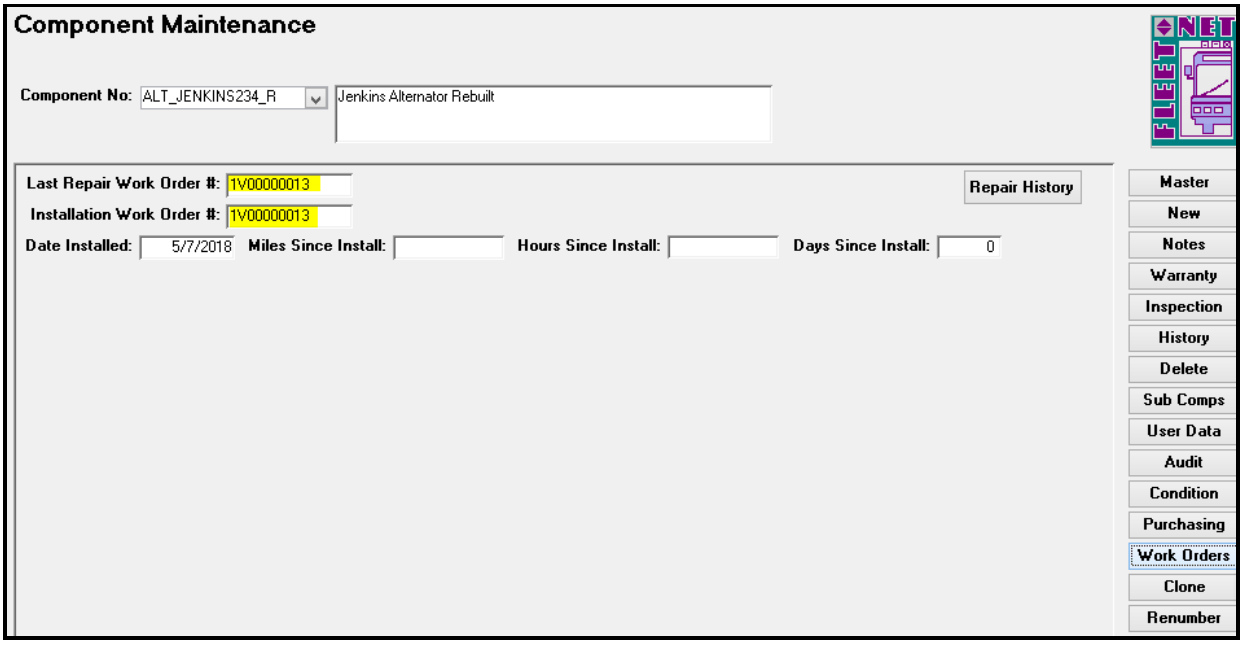
Date	Item / Component	Description	Quantity	Unit Cost
5/7/2018	ALT_JENKINS234_R	Install New asset		

Complete the work order process as previously instructed in the Work Order Entry section of this user guide.

Once the work order has been updated, the **Component Master** form in Modify/Add Components (VM #7) populates the installation fields.



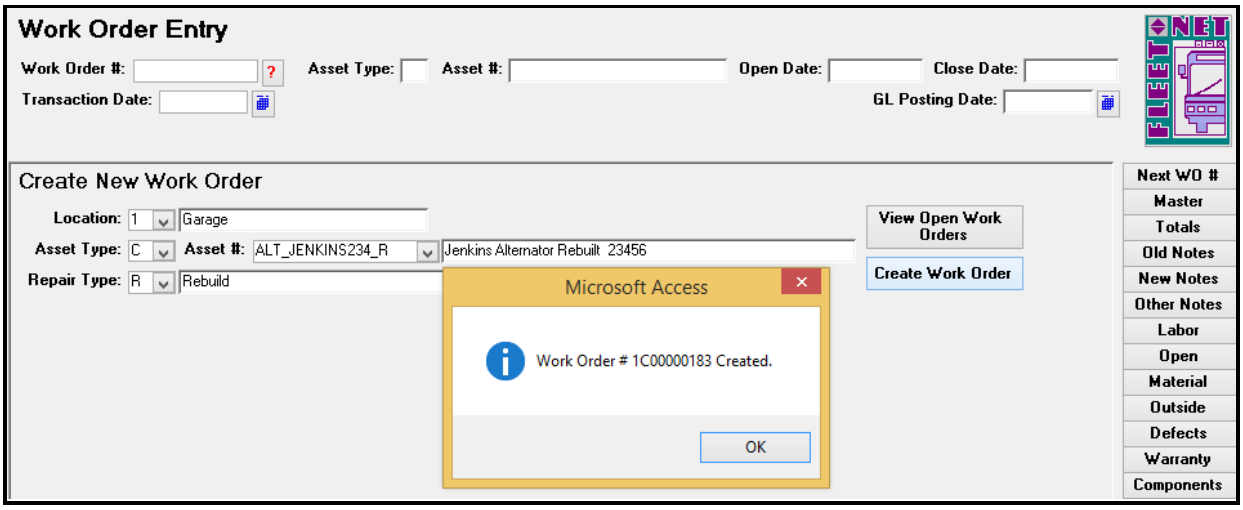
The installation work order will display when the user clicks ***Work Orders***.

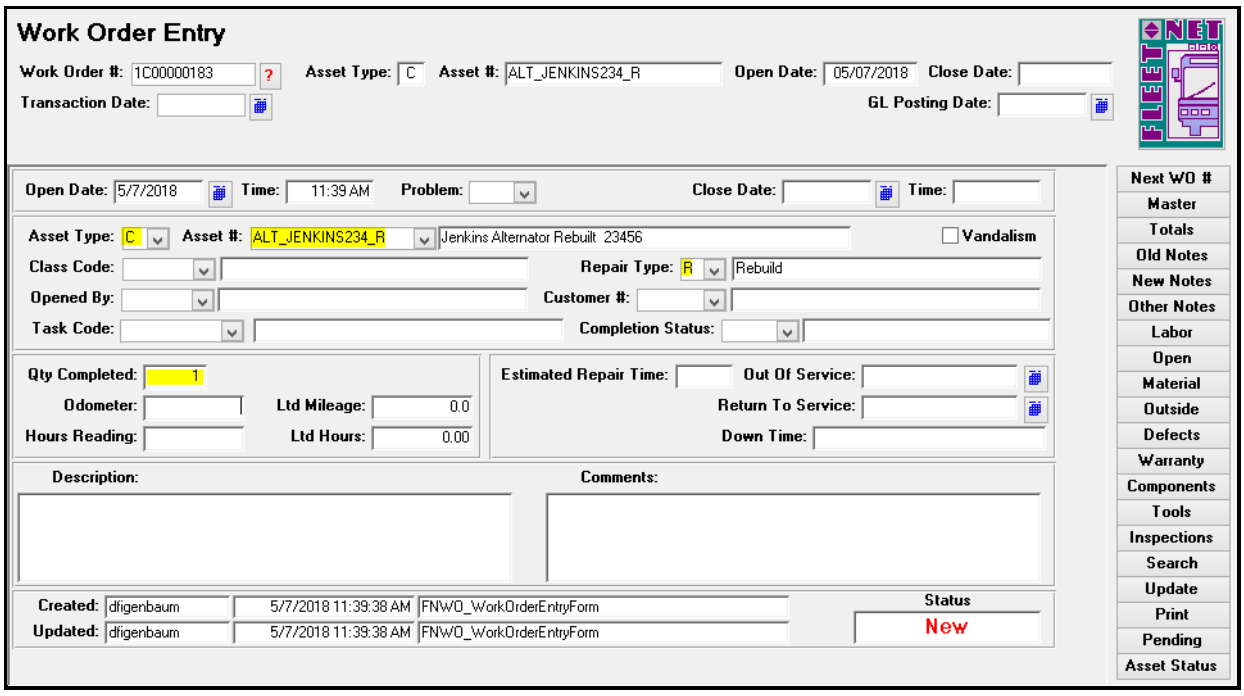


NOTE: *A component can be installed or removed without generating a work order. If a component is already installed on the vehicle (Asset #), select the vehicle (Asset #) on which the component is installed from the* **Installed on Asset #** *drop-down box in the* ***Master*** *form in* **Modify/Add Components***. Once the component is installed or added to a vehicle (Asset #),* **Miles since Install** *or* **Hours since Install** *can be tracked as of the installation date. Updated Rebuild Work Orders will update the* **Miles since Last Overhaul, Last Rebuild Date**, and **# of Rebuilds.**

Component Rebuild Work Order

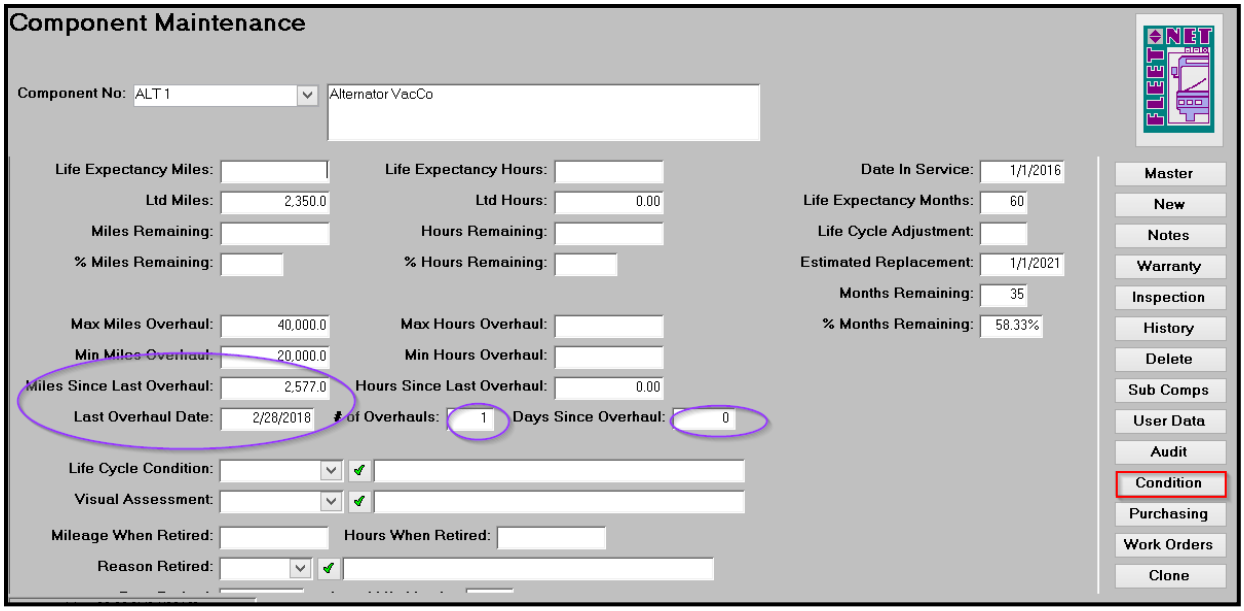
To generate a Component Work Order, select ***Next WO #***, Enter **Location**, **Asset Type** C for Component and Repair Type. Select ***Create Work Order.*** Click ***OK***.





Enter any Labor and/or Material associated with the work order. Once the rebuild has been completed and the work order is ready to be closed, enter, or select the **GL Posting Date**, enter or select the **Close Date** and update the work order. As previously instructed with all work orders, review the Work Order Update Audit Report and Work Order Update GL Distribution Audit Report before completing the update.

Once the work order has been closed, the ***Condition*** button on the **Component Master** Form (VM #7) will be updated to show how many miles have passed since the Overhaul, the date and how many overhauls the Component has had.



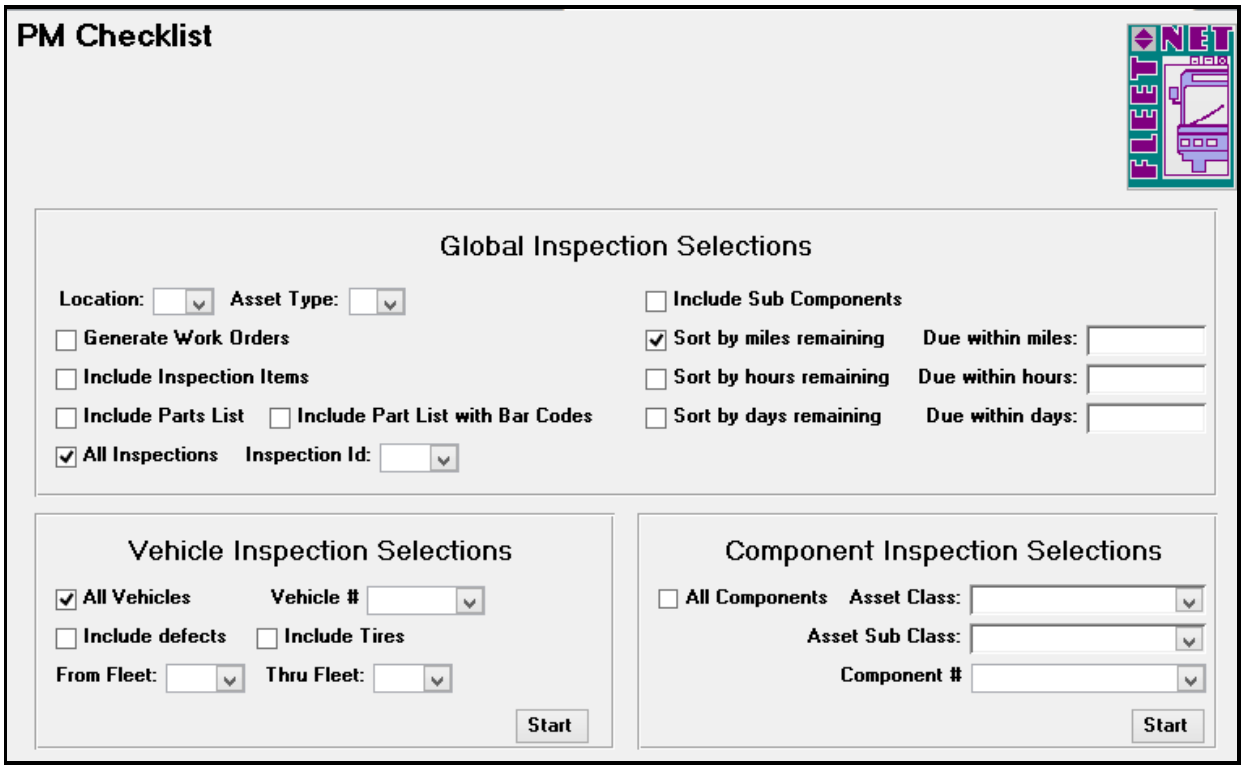
Inspection Work Orders

Inspection Work Orders should be generated via ***PM Checklist*** (VM02 #2) in Vehicle Maintenance.

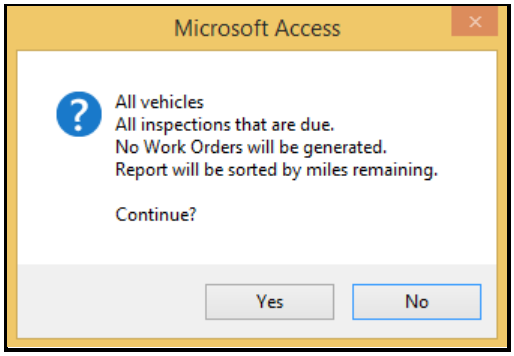
Inspection Work Orders can be generated for one specific vehicle or one component.

Inspection Work Orders can be generated for All Vehicles or All Components. The PM Checklist form provides selections to generate inspection work orders for vehicles or components. See the Vehicle Maintenance User Guide to setup Modify/Add PM Types, Modify/Add PM Cycles, Modify/Add PM Checklist Items, and Modify/Add PM Parts List.

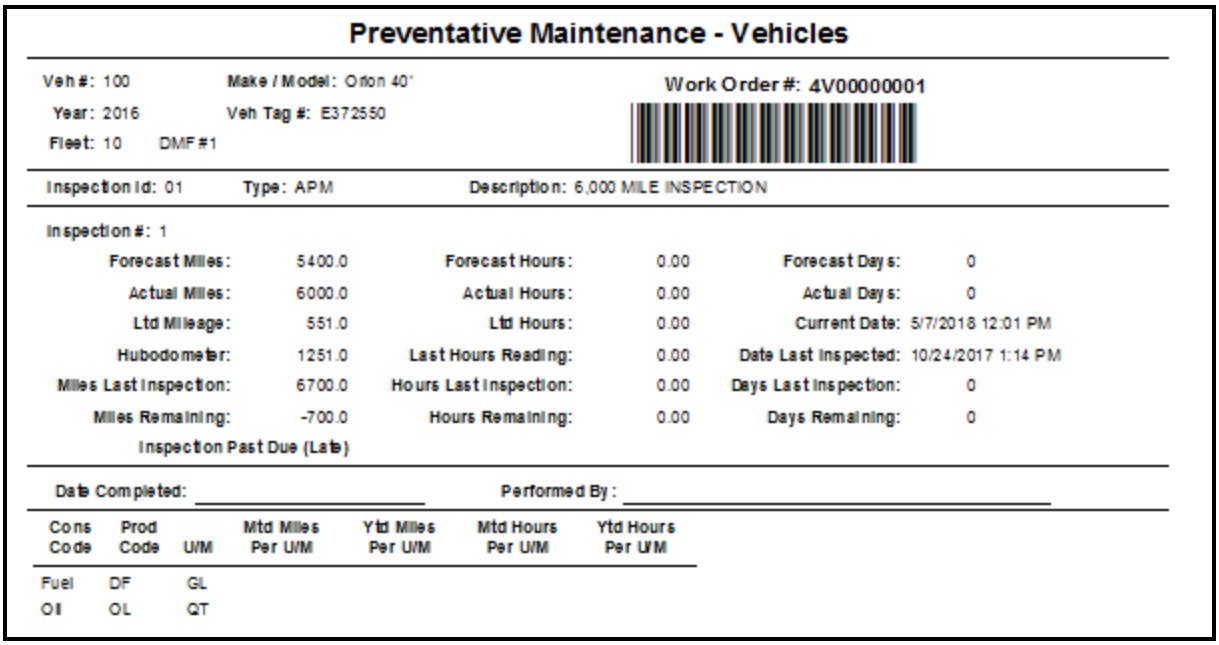
Inspection Work Orders that have been generated using this form can be selected and completed via the Work Order Entry.



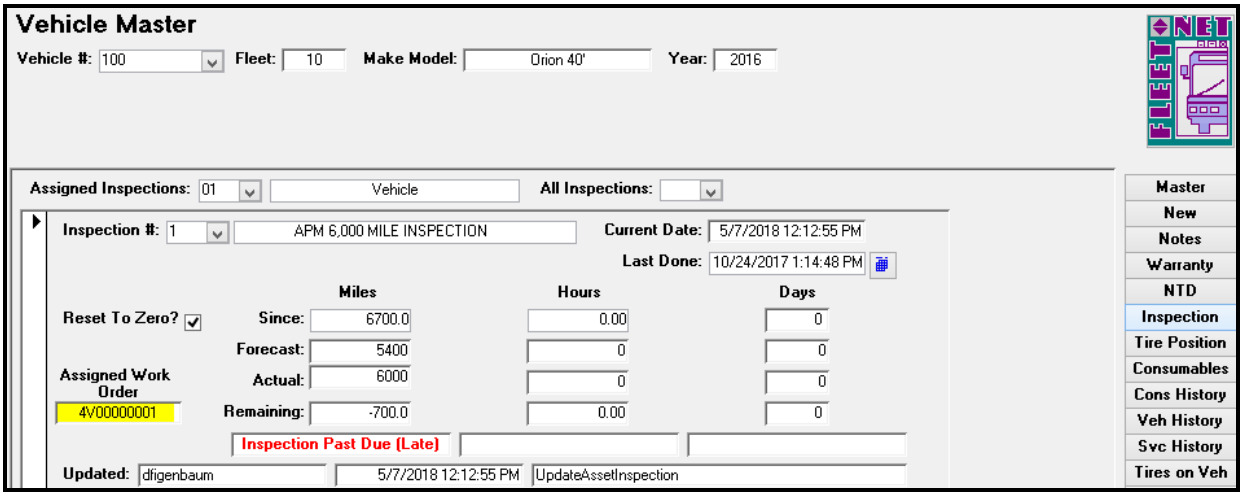
Based on selections chosen, an Inspection Work Order will be generated, which can be selected and completed via Work Order Entry form.



Check List Items and Parts that have been setup via Vehicle Maintenance, Inspection Planning (VM02) will display on the “Preventative Maintenance – Vehicles” report after the Inspection Work Order has been generated. A hard copy of this report may be printed and given to maintenance personnel completing the inspection.

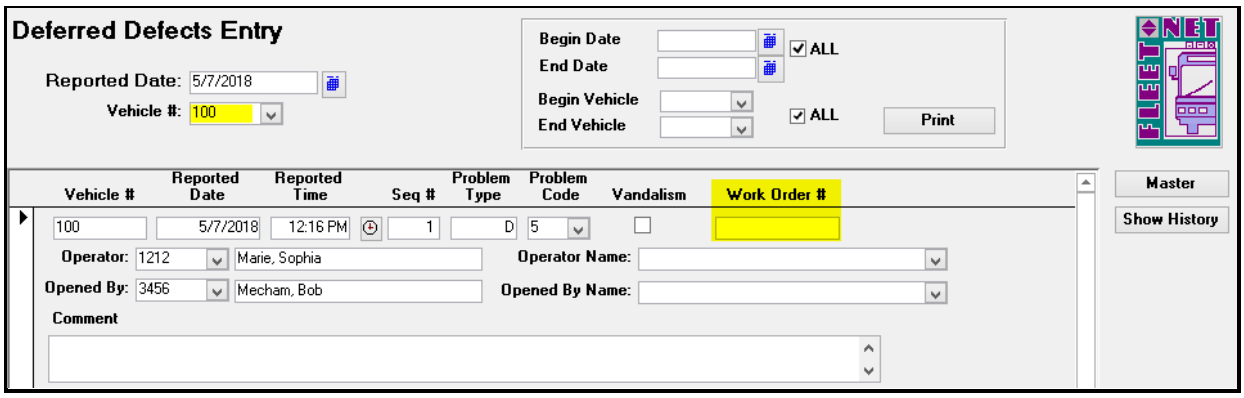


The assigned work order number will now show on the ***Inspection*** screen in the Vehicle Master.

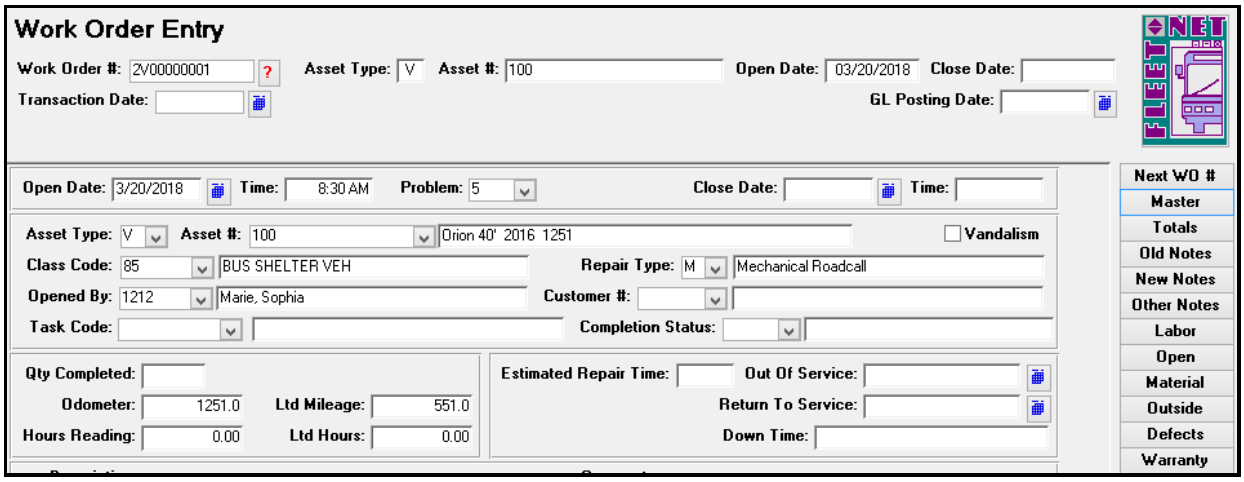


Defect Work Order

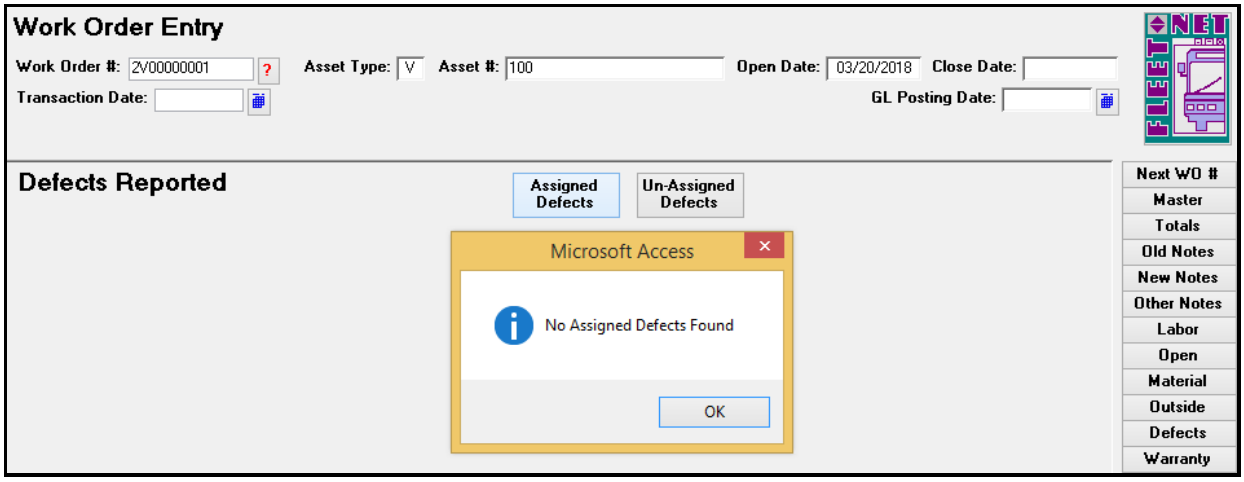
Defects reported through the Vehicle Problems module can be assigned to an open Work Order. These are reported through the Vehicle Problems Deferred Defect Entry form (VP #2). See example below.



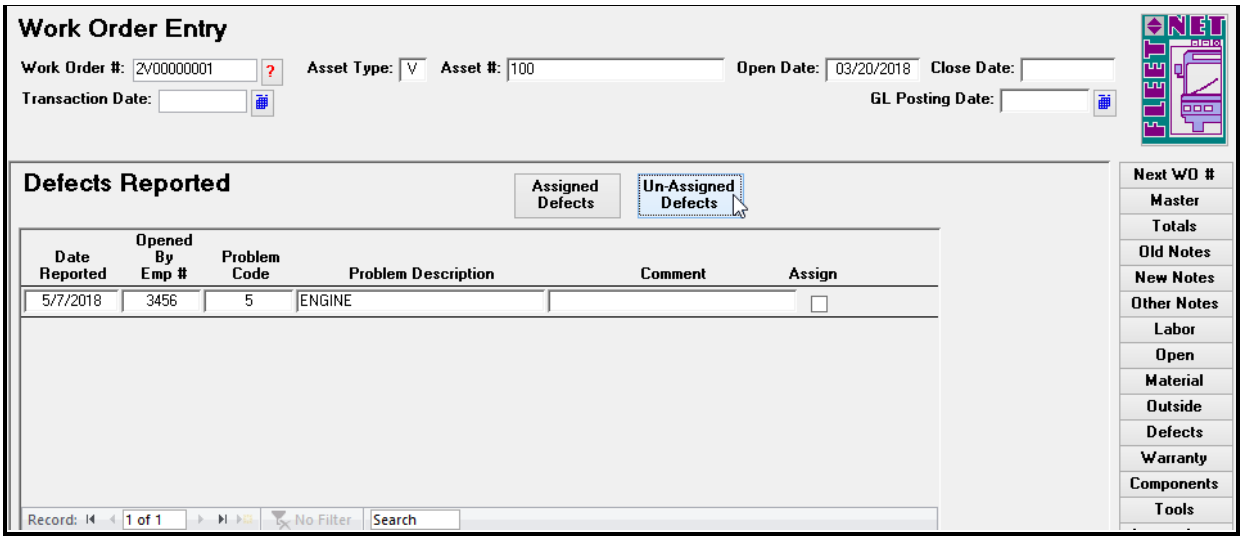
Defects can be assigned in the Work Order Entry form by clicking ***Defects***.



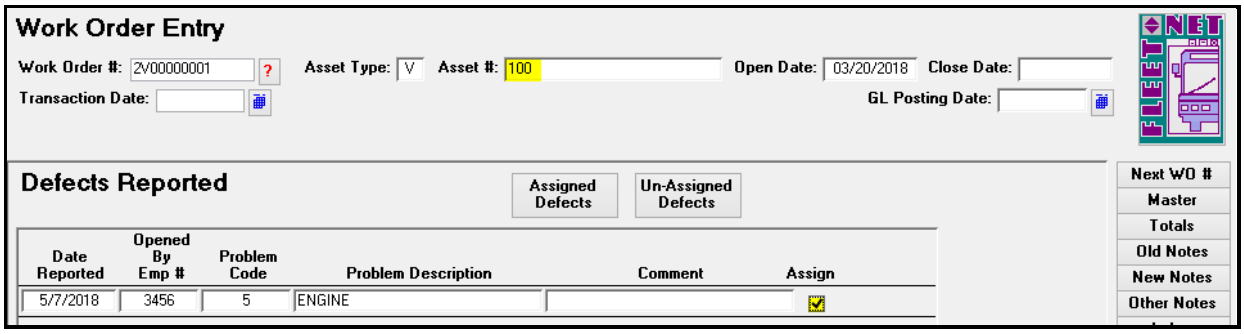
If no Defects have been entered via Vehicle Problems, the following message will display.



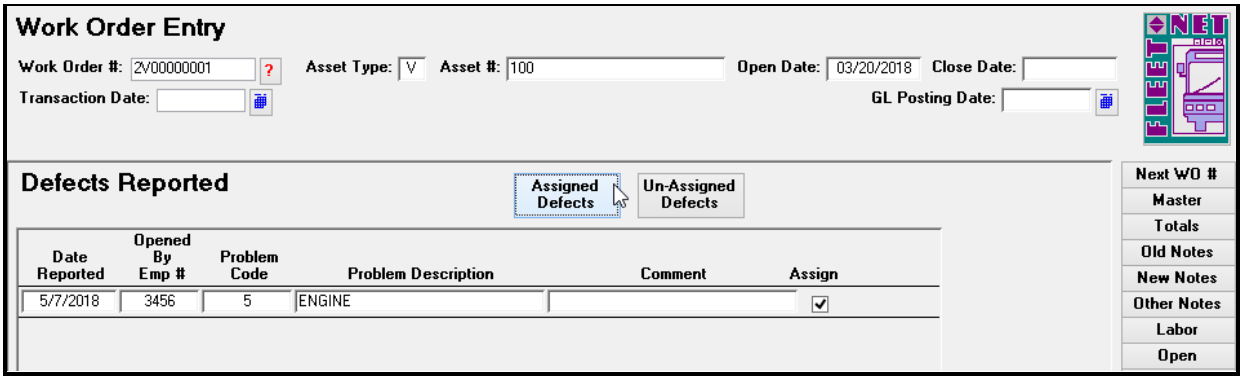
Click ***Un-Assigned Defects*** to view defects reported via Vehicle Problems, Deferred Defect Entry. Only those which have not been previously added to a WO will show on this screen.



To assign the defect(s) to this work order, check the Assign check box or boxes. An unlimited number of defects can be assigned to a single work order. Defects can also be deferred for repair until a later date. Provided defects have been reported (entered via VP #2), the defects remain available for assignment on any work order generated for the specific Asset #.



Click ***Assigned Defects*** to review any defects assigned to the work order. To un-assign the defect, uncheck the Assign check box.



Defects assigned to a work order will display in the Defects section of the printed work order. This will provide the mechanics with a hard copy of any defects that need repair.

Work Order #: 2V00000001

Opened On:	3/20/2018	Completed:	
Repair Type:	M		
Class Code:	85	BUS SHELTER VEH	
Opened By:	1212	Marie, Sophia	
Vandalism:	No		

2V00000001

Vehicle 100		Odometer:	1,251.0
Orion 40' 2016		Ltd Mileage:	551.0
Serial #:	1FMMM33MM2MM333		
Assignment:			

Labor/Outside Labor

Date	Emp/Ven	Op Code	Hours	Comments	

Materials / Components

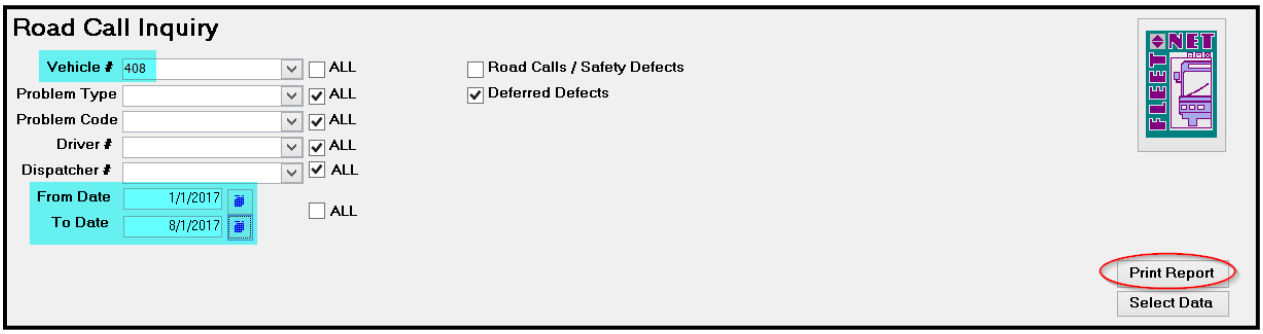
Date	Item / Component	Description	Quantity	Unit Cost

Work Order #: 2V00000001

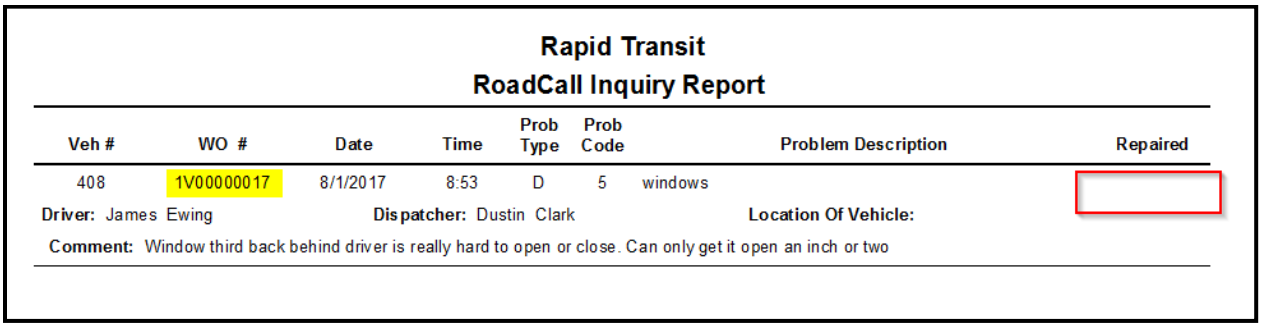
Defects

Date	Reported By Emp #	Problem Code	Problems	Comments
5/7/2018	3456	5	ENGINE	

Once the work order is **Closed** and **Updated**, any Assigned Defects will be marked as repaired and can be reviewed on the Road Call Inquiry Report (VP #4) in Vehicle Problems. Minimum selections may be **Vehicle #** (Asset #) and/or **From Date** and **To Date** fields. Any other criteria selected will narrow the results further based upon the selections. Click ***Print Report*** to review.



When the defect has been added to a WO, the number will display in the second column. Once the WO is closed, a date will populate under Repaired in the last column. The WO below is still open.



Rapid Transit

RoadCall Inquiry Report

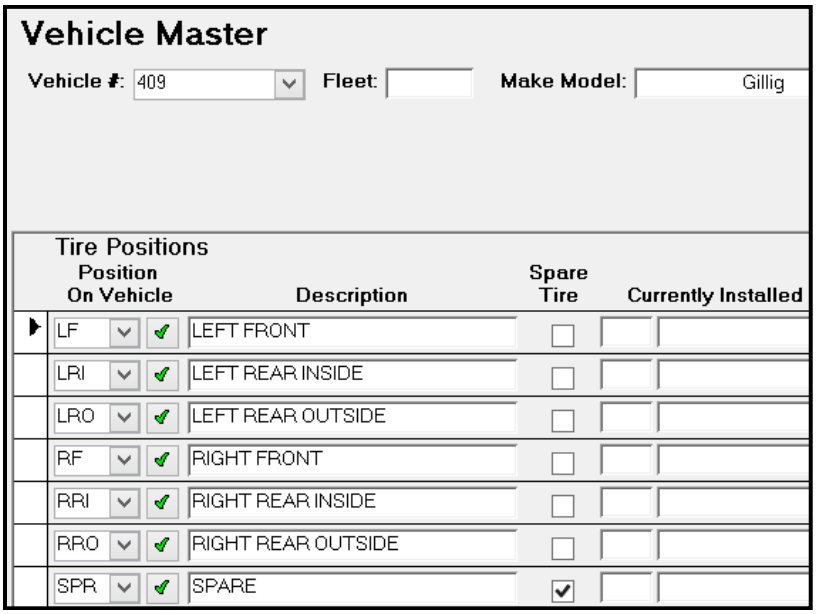
Veh #	WO #	Date	Time	Prob Type	Prob Code	Problem Description	Repaired
408	1V00000017	8/1/2017	8:53	D	5	windows	

Driver: James Ewing **Dispatcher:** Dustin Clark **Location Of Vehicle:**

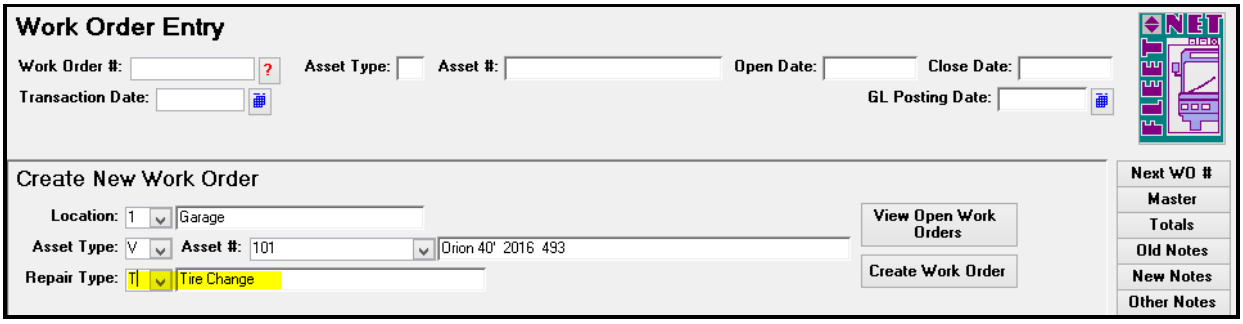
Comment: Window third back behind driver is really hard to open or close. Can only get it open an inch or two

Tire Change Work Order

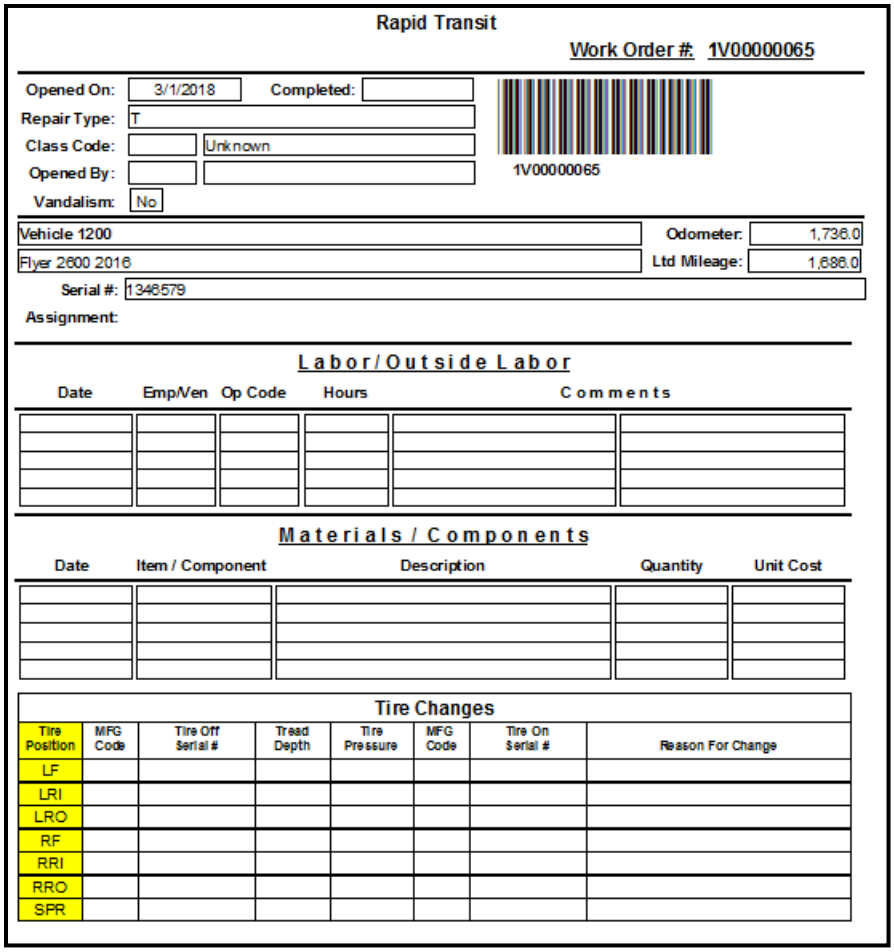
Tire positions for the vehicle must be setup first in Vehicle Maintenance, Modify/Add Vehicles, in order for the tire positions to appear on a Tire Change Work Order.



To create a Tire Change Work Order, use T = Tire Change as the Repair type.



Once tires and positions are setup for a vehicle and a Tire Change Work Order is printed, the tire positions for the vehicle will appear on the bottom of the Work Order.



Rapid Transit

Work Order #: 1V00000065

Opened On: 3/1/2018 Completed:
Repair Type: T
Class Code: Unknown
Opened By:
Vandalism: No

1V00000065

Vehicle 1200 Odometer: 1,736.0
Flyer 2600 2016 Ltd Mileage: 1,686.0
Serial #: 1346579
Assignment:

Labor/Outside Labor

Date	Emp/Ven	Op Code	Hours	Comments

Materials / Components

Date	Item / Component	Description	Quantity	Unit Cost

Tire Changes

Tire Position	MFG Code	Tire Off Serial #	Tread Depth	Tire Pressure	MFG Code	Tire On Serial #	Reason For Change
LF							
LRI							
LRO							
RF							
RRI							
RRO							
SPR							

This section of the printed Work Order allows for handwritten entries that can then be added to Tire Change Entry.

Appendix A

Support Tip-Track Warranty Parts

Topic/Problem:

To help keep track of warranty parts in the future, the following procedure should be followed in the Work Order.

Procedure:

1. Remove part from the Vehicle.
2. Enter on the WO as a –1. This will return the item to inventory.
3. Add new part to bus. Enter the item on the work order as normal. This will reduce inventory.
4. Do a Warranty Adjustment to take away Quantity of 1 and send out part. Debit Warranty adjustment account (may need to set this up) and Credit inventory account.
5. When the part returns, do a new warranty adjustment to put the part back in stock. Debit inventory account and Credit warranty adjustment account.
6. The part is now back in inventory waiting for next install.

Appendix B

Support Tip-New WO Employee Setup

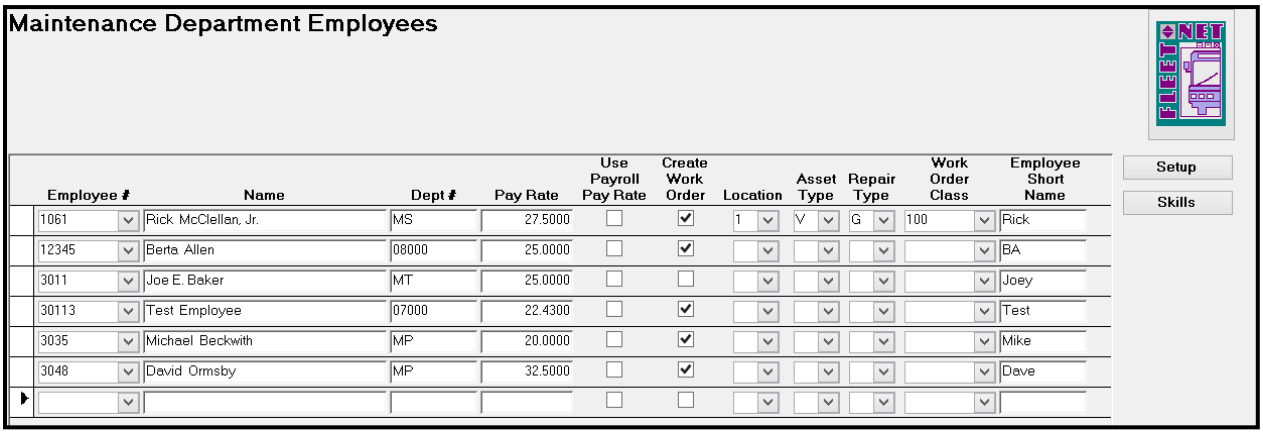
Topic/Problem:

How to setup a new maintenance employee in work orders.

Procedure:

Only employees entered via this form can be assigned to Work orders and other maintenance related programs. Therefore, setup only Maintenance personnel on this form.
Click ***Setup*** to identify Maintenance Department Employees.

Setup



Employee #	Name	Dept #	Pay Rate	Use Payroll Pay Rate	Create Work Order	Location	Asset Type	Repair Type	Work Order Class	Employee Short Name
1061	Rick McClellan, Jr.	MS	27.5000	☐	☑	1	V	G	100	Rick
12345	Berta Allen	08000	25.0000	☐	☑					BA
3011	Joe E. Baker	MT	25.0000	☐	☐					Joey
30113	Test Employee	07000	22.4300	☐	☑					Test
3035	Michael Beckwith	MP	20.0000	☐	☑					Mike
3048	David Ormsby	MP	32.5000	☐	☑					Dave
				☐	☐					

Field	Description
Employee #	The employee must be set up in the system parameters before they can be chosen here. If they are in the system, then they will be in the drop-down list.
Name	The employee's name is automatically populated.
Dept #	The employee's department number is automatically populated.
Pay Rate	Enter a pay rate to be used for work order labor calculation. If using the employees pay rate from payroll, enter 0.00.
Use Payroll for Pay Rate	Select checkbox to use the employee's pay rate from the employees pay records via payroll.
Create Work Order	Click the checkbox if the employee is permitted to create a new WO via the Employee Assignments form. A check mark here causes the Create WO # button to appear for the users once they have entered their PIN.
Applies to Next 4 Fields	The following information applies to Location, Asset Type, Repair Type and Work Order Class Code. These are the default codes that will show when a user creates a new work order in Employee Assignments. Information populated in this form can still be overwritten. Field can be left blank here. The employee will need to manually enter the code when creating a work order.
Location	The location selected here will become the default location (WO # prefix) when creating a new work order via Employee Assignments.
Asset Type	The asset type selected here will become the default when creating a new WO via Employee Assignments. If the mechanic primarily works on buses, select V, for example, or, if it is a facilities employee, select F.
Repair Type	The location selected here will become the default repair type when creating a new work order via Employee Assignments form. Examples of repair types are G-General Repair, A-Accident etc.

Work Order Class	The location selected here will become the default Work Order class code when creating a new work order via Employee Assignments. Examples of class codes are chosen via the drop-down. This is an important code because it determines which GL account numbers will be charged for materials, labor and outside services.
Employee Short Name	Enter employee's initials or some other short unique identifier. This name will be visible via the Word Order Status forms.

Click ***Skills*** to enter the skills of each maintenance employee based on Tasks and/or Labor Operation Codes to assist in work order assignment.

Skills

Field	Description
Employee	Select the employee sorted by last name. Employee number and full name display.
Task Code	Select a task code as setup via Modify/Add Tasks. The task description will display. A message will display asking Assign All Operation Codes For This Task? When you click ***OK***, this will assign all operation codes for this task. Leave Task code blank to only assign Labor Operation codes
Operation Code	Select the operation codes from the drop-down list. A search button has been provided for ease of finding specific operation codes.