NETfacilities IMPLEMENTATION GUIDE – BASIC WORK ORDER

September 18, 2020
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Basic User Creates Work Order

A basic user in the system are the following user roles: Basic Staff, Tenant, Customer, Advanced Staff, and Student/Staff.

A basic user is limited to only having the permission to submit a work order.

As a basic user follows the steps below to create a work order, some fields may not be enabled in your domain as they are determined by your Administrators. As a basic user all required fields will be indicated with an asterisk (*), meaning these must be filled in to successfully create the work order.

Basic User login will be very limited to only see the Work Orders Management module and Setup.

Click the Work Orders tile to see the following:
Step 1: Click 'Work Order' to navigate to the 'Create New Work Order' page.

Step 2: Fill and select all the required fields. Fields are defined below.
Step 3: Once all required fields are selected, click the 'Submit' button to create the work order. Work order will be sent to the listed 'Reviewer/Approver' assigned.

Field Definitions:
* Indicate required fields to successfully submit the work order.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site*</td>
<td>Select the Site that the work order is being submitted for. If your profile allows for multiple jurisdictions (sites or locations) the drop down will display the sites enabled in your user profile. If you are missing a site or need to update, please reach out to your Admin or Site Admin.</td>
</tr>
<tr>
<td>Sub-site*</td>
<td>Select Sub-Site if applicable.</td>
</tr>
<tr>
<td>Area*</td>
<td>Select Area if applicable.</td>
</tr>
<tr>
<td>Location Description*</td>
<td>150 spaces and characters allowed to enter a note. For example, a more detailed description of the area.</td>
</tr>
<tr>
<td>Date &amp; Time</td>
<td>Current date is automatically entered by the system, click the calendar icon to select a future date if needed. *Basic users cannot select a past date.</td>
</tr>
<tr>
<td>Service Type*</td>
<td>Select a Service Type from the drop down. This list is setup by the Administrators in the system.</td>
</tr>
<tr>
<td>Symptoms &amp; Tasks</td>
<td>If Symptoms &amp; Tasks (presets) are available select from the drop down, this will automatically fill the service description. Basic users cannot create a new Symptom &amp; Tasks. Admins have the ability to make this a required field.</td>
</tr>
<tr>
<td>Service Description*</td>
<td>Enter a description for what you are reporting for the work order. Or, if Symptoms &amp; Tasks was selected you may now edit the text, anything entered will not be saved to the Symptom &amp;</td>
</tr>
<tr>
<td>Priority Level</td>
<td>Tasks.</td>
</tr>
<tr>
<td>---------------</td>
<td>--------</td>
</tr>
<tr>
<td></td>
<td>The lowest will be automatically be selected by the system, select a different level if needed. This field may not be enabled in your domain. Admins can rename these fields.</td>
</tr>
</tbody>
</table>

**Advanced User Work Order Process**

An advanced user in the system are the following user roles: Maintenance, Site Admin, District Admin, Region Admin, and Admin.

An advanced user has the permissions to create, approve, and close out a work order. This may differ if the user’s permissions have been customized.

As an advanced user, follow the steps below to create a work order, some fields may not be enabled in your domain as they are determined by your Administrators. All required fields will be indicated with an asterisk (*), meaning these must be filled in to successfully create the work order. As an advanced user, some fields will be optional but we suggest to always fill all fields to provide as much information as possible. These fields are also important when running reports in the system.

Advanced user login will have all or certain modules enabled depending on their user role and user permissions.

As displayed above, click the 'Work Orders' tile to land on the 'Overview' page.
Step 1: Click the 'Work Order' button to go to the Create Work Order page.

*Reminder some fields may not be enabled in your domain. Some fields may also be required if Administrator has enabled these settings.

Step 2: Fill and select all the required fields (see fields table glossary below for more information)

Step 3: Once all required fields are selected click the 'Submit' button to create the work order. Work order will be sent to the listed 'Reviewer/Approver' assigned. Or, click the 'Approve & Output' button to continue onto the next step of assigning the work order.

Step 4: On the 'Output Work Order' page, the information on the left side of the page is information previously entered for the work order and the additional fields can be completed where those with asterisks are required (see fields table glossary below for more information)

Note: The 'Output To' drop down will display 'In House Staff' or vendor names. Vendor will only display if the service type selected is listed in their profile under 'Services' and if they have jurisdiction to the site selected. The 'Assignee' drop down will only display users with the 'Receive Work Orders' permission enabled.
Fields Table Glossary

Note: Required fields will be indicated with the * symbol next to the field name

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Tracking</td>
<td>Select the method by which the work order issue was brought to the user's attention.</td>
</tr>
<tr>
<td>Priority</td>
<td>Select the work order priority.</td>
</tr>
<tr>
<td>Schedule Date/Time</td>
<td>Select the date and time for the scheduled work to begin. Note: The default selection is the current date and time, but it can be set to a future date and time.</td>
</tr>
<tr>
<td>Firm Schedule</td>
<td>Select whether or not the assignee must complete the work on or before the designated due date. This is essentially an optional priority designation or note. It will appear in the print preview pop-up. Note: The default selection is No.</td>
</tr>
<tr>
<td>Overdue Date/Time</td>
<td>Default overdue date will be populated by the 'Complete By Days' settings set by an Administrator in the 'Company Settings.' User can manually extend this date range for the work order by clicking the calendar icon and selecting date.</td>
</tr>
<tr>
<td>Output To</td>
<td>Choose whether the work order will be assigned to a Vendor or a member of the in-house staff.</td>
</tr>
<tr>
<td>Assignee</td>
<td>Select either the Vendor or in-house staff member who will be assigned this work order.</td>
</tr>
<tr>
<td>CC Email</td>
<td>Enter any email addresses (separated by commas)</td>
</tr>
</tbody>
</table>
that you would like to be included in this work order.

**Budget Hours**
Select an approximate number of hours you would like to budget for the task. Use 'Budget Hours Converter' by clicking the grey icon box next to drop down, must be entered in decimals or whole hours.

**Comments**
1000 spaces and characters available to enter a comment to the assignee or a comment to be documented.

**Internal**
Check box if you would like to make the 'Comment' entered an internal note; originator or basic user will not be able to view comment.

---

Step 5: You will complete approving the work order by clicking any or all of the following: 'Approve & Send,' 'Approve & Fax' or 'Approve & Print' button. Notice after clicking the button becomes grey letting you know this action has been taken.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Approve &amp; Send</strong></td>
<td>Assigns the work order and sends an alert to the assignee and originator. Print preview will also open.</td>
</tr>
<tr>
<td><strong>Approve &amp; Fax</strong></td>
<td>Assigns the work order and sends a fax if the fax information is correctly entered in the system. Print preview will also open.</td>
</tr>
<tr>
<td><strong>Approve &amp; Print</strong></td>
<td>Assigns the work order and opens the print preview window, alerts will not be sent.</td>
</tr>
</tbody>
</table>

---

Step 6: From the Overview page, hover over the action button and click on the 'Close-Out' option.
Step 7: On the Close-Out page, select the Completion Date/Time. Enter 'Close out Notes' or select a preset from the 'Close out Preset' drop down if available. All fields defined below and steps to create a preset.

*Reminder all required fields are designated with the * symbol.

<table>
<thead>
<tr>
<th>Completion Date/Time*</th>
<th>Select the completion date by clicking the calendar icon. Time is optional.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close-Out Preset</td>
<td>Presets may be available when closing out work orders. If your permissions allow, you may create a new preset see steps listed below for further information.</td>
</tr>
<tr>
<td>Close-Out Notes</td>
<td>3000 spaces and characters allowed in this field. If previous field 'Close-Out Preset' was selected, the Close-out Notes field will be populated but additional information may be entered; however, it will not be saved as part of the preset.</td>
</tr>
<tr>
<td>Force Close Out</td>
<td>Check box ONLY if it is certain that edits/updates will not be needed for the work order. Force closing out a work order will immediately set it to the 'Closed' status which does not allow for the work order to be 'Interrupted' (re-opened).</td>
</tr>
</tbody>
</table>

Step 8: Click the Close-Out button to complete closing the work order. A green bubble will appear in the upper right corner of the screen confirming the work order has been closed.
Sub-tab Information

Asset Tracking

Step 1: Click the 'Asset Tracking' sub-tab

Step 2: Select asset from the 'Attach Asset' drop down

*Reminder only assets located at the selected site/sub site/area will display. The asset must also have the selected service type enabled.

Step 3: Continue with next action for the work order, once the asset is selected from the drop down the asset is attached to the work order. Once selected the following information will display.

*IMPORTANT NOTE: Asset must be attached to the work order before taking the 'Close Out' action. This protects the assets records, as an asset cannot be attached if the work order is in the 'Closed' status. If the work order is in the 'Completed' status, the 'Interrupt' action can be taken which re-opens the work order which allows you to attach an asset if needed.
Adding Labor Cost

The 'Labor Cost' tab can be used to record labor use and costs. Labor amounts can be entered at any time throughout the lifetime of the work order, even after it has been Completed or Closed. This feature is only available for in-house staff active users.

Step 1: Click the 'Labor Cost' sub tab.
Step 2: Click the 'Add New Record' button.

Step 3: Fill all required fields and any applicable optional fields.

*All required fields are indicated with an asterisk (*) symbol.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee*</td>
<td>Choose an in-house staff users name from the drop down.</td>
</tr>
<tr>
<td>Date*</td>
<td>Select date from the calendar, notice only dates from the lifespan of the work order will display. Cannot select outside the date range of the creation date and closed date.</td>
</tr>
<tr>
<td>Notes/Description</td>
<td>Optional field to enter notes or a description of what the user performed for the work order.</td>
</tr>
<tr>
<td>Rate Type*</td>
<td>Choose a rate type from the drop down. Defaults may be listed or customized entries created by an Administrator. See users 'Payroll Info' sub tab for further information. Please refer to Knowledge Center for further information.</td>
</tr>
<tr>
<td>Hours*</td>
<td>Enter time spent on the work order. Enter in full hours or decimal format. See reference chart below in 'Additional Notes.'</td>
</tr>
<tr>
<td>Labor Cost</td>
<td>Total cost calculated by a set rate multiplied by hours entered. Note: Cost will be</td>
</tr>
</tbody>
</table>
zero if the users pay rates are not setup in their 'Payroll Info' tab.

<table>
<thead>
<tr>
<th>Billable</th>
<th>Check box if this will be a billable cost.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bill Rate</td>
<td>Set a higher bill rate if necessary.</td>
</tr>
<tr>
<td>Amount To Bill</td>
<td>Bill Rate multiplied by hours entered will calculate to the total billable amount.</td>
</tr>
</tbody>
</table>

Step 4: Click 'Update' to save. Click 'Edit' after saving to make any update needed.

```
Note: Multiple users can enter hours for the same work order. Labor Costs can be entered any time after the work order is 'Approved.'

Material Cost Sub-tab

The material cost sub-tab helps track which products have been used for a work order, both inventory and non-inventory items.

Adding Inventory Items

Add an inventory item from your inventory list in the system.

Step 1: Click the 'Material Cost' sub-tab.
Step 2: Click 'Add New' button
```
Step 3: Click warehouse from the 'Item Storage' drop down

Step 4: Click item from the 'Item Number: Description' drop down

Step 5: After selecting item, the item number will populate as well as the 'On Hand' count and 'Unit of Measure.' The 'Quantity' is entered and the 'Total Cost' is calculated.

Optional: If item is to be invoiced, the cost of the item can be marked up with a 'Resale' value.

*Reminder On Hand count and items are set up when adding Inventory Items in the system. Please refer to Knowledge Center for further information.

Step 6: Click 'Update' to save item to the work order.

**Note:** On Hand count now subtracts the quantity used for the work order. The 'Material Cost' will display the current material cost recorded.

Adding Non-Inventory Items

Add an item that is not in the inventory list. For example, can be used to document an item that was purchased for this work order only.

Step 1: Click the 'Material Cost' sub-tab.
Step 2: Click 'Add New' button
Step 3: Click 'Non-Inventory Item' from the 'Item Number: Description' drop down

Step 4: Enter all the required fields. Optional: If item is to be invoiced, the cost of the item can be marked up with a 'Resale' value.

Step 5: Click 'Update' to save entry. The 'Material Cost' will display the current material cost recorded.

Note: The asterisk (*) designates the required fields.

<table>
<thead>
<tr>
<th>Item Number: Description*</th>
<th>Quick entry to describe what the item purchased is</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Hand</td>
<td>Will be empty as this item is not in the inventory list</td>
</tr>
<tr>
<td>Qty*</td>
<td>Enter quantity</td>
</tr>
<tr>
<td>Unit Of Measure*</td>
<td>Choose the unit of measure from the default system list</td>
</tr>
<tr>
<td>Unit Cost*</td>
<td>Enter the unit’s cost</td>
</tr>
<tr>
<td>Total Cost</td>
<td>Amount calculated after 'Update' is clicked to save entry</td>
</tr>
</tbody>
</table>

Billed Services Sub-tab

The 'Billed Service' sub-tab can be used to record any billable service that was performed for the work order. Presets can be saved if there are recurring services used by your technicians, steps will be listed below. One time used 'Billed Services' can also be entered manually.

Preset Option:
Step 1: Click the 'Billed Services' sub-tab.

Step 2: Check the box labeled 'Include Billable Services.'
Optional: Enter a 'Not to Exceed Amount,' set a limit for users not to exceed.
Optional: Enter a 'PO Number,' can be any identifier your organization uses.

Step 3: Click 'Add New Record' button.

Step 4: Create a preset or skip to Step 8 if presets already exist. Click the grey icon box next to the 'Choose One' drop down to create new.

Step 5: Pop up window will open, click 'Add New' button.

Step 6: Select 'Sites' and 'Service Types' that will apply to the preset. Enter an optional 'Reference #,' Enter a 'Service Description' for the preset; for example, "Service Fee" or "Maintenance Fee." Enter a set price for the service. Enter a type of 'Measure;' for example, "Each," "Hour," etc.

Step 7: Click 'Update' to save new entry or after saving an update.
Step 8: Select the preset from the 'Choose One' drop down

Step 9: Enter a quantity amount, 'QTY.' Notice any saved information from the created preset will populate after selecting it.
Step 10: Click 'Update' to save.

Additional Notes:

Notice the total amount displays in the sub-tab label after any entry is saved.
Click 'Edit' to make an update to the entry. Click 'Update' to save change.
Click 'Delete' if entry should be removed from the work order.
Custom Option:
Use if a preset does not apply to the billable service being documented.

Step 1: Click 'Billed Services' sub-tab.
Step 2: Click 'Add New Record' button.
Step 3: Enter all fields manually.

Note: Required fields are indicated with an asterisk (*) symbol.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>QTY*</td>
<td>Enter quantity used.</td>
</tr>
<tr>
<td>Item No. Description*</td>
<td>Enter the name of the service or item used.</td>
</tr>
<tr>
<td>Ref #</td>
<td>Optional field to enter a reference number.</td>
</tr>
<tr>
<td>Units of Measure*</td>
<td>Enter the measure used, examples 'Each,' 'Hour,' etc.</td>
</tr>
<tr>
<td>Sale Price*</td>
<td>Enter price for the service or item that will be billed.</td>
</tr>
<tr>
<td>Total Sale</td>
<td>Calculated after quantity and price are entered.</td>
</tr>
</tbody>
</table>

Action
Click 'Update' to save.
Click 'Cancel' if you do not want to save change.
Click 'Edit' to save changes made after entry is saved.
Click 'Delete' to delete entry and remove from the work order.
Files Sub Tab

Step 1: Click 'Files' sub tab

Step 2: Set radio button to 'File Upload'
Step 3: Click 'Browse...' button, select file from your computer’s files
Step 4: Click 'Update' to save

OR

Step 2: Set radio button to 'Link'
Step 3: Enter URL [For example link to a shared Google Drive Folder or Dropbox]
Step 4: Click 'Update' to save

Audit Trail Sub Tab

Step 1: Click the 'Audit Trail' sub tab

Columns Explained:
Author: User Role or System documented on who or what is taking the action
Date/Time: System is dating and time stamping the action, this information cannot be altered
Message: Detail on what the action taken was for the work order
Private: If 'Internal' comments are entered, column will display 'Yes.'

Log Sub Tab

Step 1: Click on the 'Log' sub tab

Step 2: Set date range from the 'Date' filter.

The 'Log' will display actions taken by a user for the work order. For example, if a user changes the service description the system will timestamp the action, list the user's name, and the entry made.

Columns Explained:
User: System will document the user's name that is taking an action.
Timestamp: System is dating and time stamping the action taken.
Message: System will document exactly what the action was.
Create Work Order Page Option

There are a few options that allow you to continue onto the step to 'Approve' a work order and assign it to a user or vendor. Below are the steps to follow for each option available, reminder this action is allowed only if your user role and permissions allow.

Step 1: From the Create Work Order page [please refer to Knowledge Center for further information], fill out the details of the work order, and click the Approve & Output button.

Step 2: On the 'Output Work Order' page the assignee will be selected. The information on the left side of the page is information previously entered for the work order. Below each field is explained further.

This step requires an assignee for the work order, the 'Output To' drop down will display 'In House Staff' or vendor names. The 'Assignee' drop down will display users when the 'Receive Work Orders' permission enabled.
Step 3: You will complete this step by clicking any or all of the following: 'Approve & Send,' 'Approve & Fax' or 'Approve & Print' button. Notice after clicking the button becomes grey letting you know this action has been taken.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve &amp; Send</td>
<td>Assigns the work order and sends an alert to the assignee and originator. Print preview will also open.</td>
</tr>
<tr>
<td>Approve &amp; Fax</td>
<td>Assigns the work order and sends a fax if the fax information is correctly entered in the system. Print preview will also open.</td>
</tr>
<tr>
<td>Approve &amp; Print</td>
<td>Assigns the work order and opens the print preview window, alerts will not be sent.</td>
</tr>
</tbody>
</table>

The next Options to Approve Work Order will follow the same steps 2-4 so step 1 is outlined and then all will follow steps 2-4.

**Create Work Order Page Submit Option**

Similar to the 'Overview Page Option' clicking 'Submit' first then navigated to the 'Choose Type Page' with the radio button options.

Step 1: From the Create Work Order page, fill out the details of the work order, and click the **Submit** button.

Please refer to steps 2-4 below to complete approval.
Overview Page Option

Step 1: From the Overview page, hover over the 'Action' button and click the 'Approve' option.

Please refer to steps 2-4 below to complete approval.

Print Preview Option

The Print Preview window can be opened by clicking the work order number in the Overview page, from an email alert for the work order, or after clicking 'Approve & Send,' ‘Approve & Fax,’ or ‘Approve & Print.’

Step 1: From the Print Preview pop up window, click the Approve button.

Please refer to steps 2-4 below to complete approval.
Schedules Page Option

Step 1: From the Schedules page, hover over the 'Action' button and click on the 'Approve' option.

Please refer to steps 2-4 below to complete approval.

Email Alert Option

Step 1: From the email alert sent after a work order has been created, click the Approve button.

Please refer to steps 2-4 below to complete approval.

Step 2: On the next page, select the 'Approve & Output' radio button and click the 'Continue' button.

Note: To display the work order on the Dashboard, click the Show on Dashboard checkbox before clicking the Continue button.
Step 3: On the 'Output Work Order' page, the assignee will be selected. The information on the left side of the page is information previously entered for the work order. Below each field is explained further. This step requires an assign for the work order, the 'Output To' drop down will display 'In House Staff' or vendor names. The 'Assignee' drop down will display users when the 'Receive Work Orders' permission enabled.

Step 4: You will complete this step by clicking any or all of the following: 'Approve & Send,' 'Approve & Fax' or 'Approve & Print' button. Notice after clicking the button becomes grey letting you know this action has been taken.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve &amp; Send</td>
<td>Assigns the work order and sends an alert to the assignee and originator. Print preview will also open.</td>
</tr>
<tr>
<td>Approve &amp; Fax</td>
<td>Assigns the work order and sends a fax if the fax information is correctly entered in the system. Print preview will also open.</td>
</tr>
<tr>
<td>Approve &amp; Print</td>
<td>Assigns the work order and opens the print</td>
</tr>
</tbody>
</table>
Adding Additional Information in the sub-tabs

Before moving on to the close out step, users can enter additional information for the work order in the additional sub tabs. These sub tabs are available starting from the 'Approve & Output' until after the work order is in the 'Closed' status. This is apart from the 'Asset Tracking' sub tab which must be done before clicking the 'Close Out' button; this is to protect the asset's history. Sub tabs will be listed below.

Output Work Order Page Fields Explained:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Tracking</td>
<td>Select the method by which the work order issue was brought to the user's attention.</td>
</tr>
<tr>
<td>Priority</td>
<td>Select the work order priority.</td>
</tr>
<tr>
<td>Schedule Date/Time</td>
<td>Select the date and time for the scheduled work to begin.</td>
</tr>
<tr>
<td></td>
<td>Note: The default selection is the current date and time but it can be set to a future date and time.</td>
</tr>
<tr>
<td>Firm Schedule</td>
<td>Select whether or not the assignee must complete the work on or before the designated due date. This is essentially an optional priority designation or note. It will appear in the print preview pop-up. Note: The default selection is No.</td>
</tr>
<tr>
<td>Overdue Date/Time</td>
<td>Default overdue date will be populated by the 'Complete By Days' settings set by an</td>
</tr>
</tbody>
</table>
Administrator in the 'Company Settings.' User can manually extend this date range for the work order by clicking the calendar icon and selecting date.

<table>
<thead>
<tr>
<th>Output To</th>
<th>Choose whether the work order will be assigned to a Vendor or a member of the in-house staff.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignee</td>
<td>Select either the Vendor or in-house staff member who will be assigned this work order.</td>
</tr>
<tr>
<td>CC Email</td>
<td>Enter any email addresses (separated by commas) that you would like to be included in this work order.</td>
</tr>
<tr>
<td>Budget Hours</td>
<td>Select an approximate number of hours you would like to budget for the task. Use 'Budget Hours Converter' by clicking the grey icon box next to drop down, must be entered in decimals or whole hours.</td>
</tr>
<tr>
<td>Comments</td>
<td>1000 spaces and characters available to enter a comment to the assignee or a comment to be documented.</td>
</tr>
<tr>
<td>Internal</td>
<td>Check box if you would like to make the 'Comment' entered an internal note; originator or basic user will not be able to view comment.</td>
</tr>
</tbody>
</table>

Reminder: A user must have permissions to Approve a work order and be assigned a work order. User must have, at the least, the 'Work Order Permission' of 'View/Modify' and have the 'Receive Work Orders' check box enabled in their profile. Refer to User Role Permissions for further information [please refer to Knowledge Center for further information].

Sub-tab Information

Asset Tracking - additionally outlined within ‘Asset Tracking’

The ‘Asset Tracking’ sub tab is available once a work order is created up until the work order is in the Closed status. To access Asset Tracking for an open Invoice you must enter ‘Edit’ Mode.
1. Click the 'Asset Tracking' sub-tab
2. Select asset from the 'Attach Asset' drop down
   *Reminder only assets located at the selected site/sub site/ area will display. The asset must also have the selected service type enabled.
3. Continue with next action for the work order, once the asset is selected from the drop down the asset is attached to the work order. Once selected the following information will display.

*IMPORTANT NOTE: Asset must be attached to the work order before taking the 'Close Out' action. This protects the assets records, as an asset cannot be attached if the work order is in the 'Closed' status. If the work order is in the 'Completed' status, the 'Interrupt' action can be taken which re-opens the work order which allows you to attach an asset if needed.

Additional methods of accessing Asset Tracking are noted below.

Asset Tracking - Attach an Asset Link Option

Attach an asset from the ‘Create Work Order’ page.
1. Navigate to ‘Work Order’ to ‘Create Work Order’ page
2. Select Site, Sub site, and Area where the asset is located
3. Select a service type listed in the asset’s ‘Category/Group’
4. ‘Attach an Asset’ link will display if asset is located at the select area with correct service type
5. Pop up window opens that allows for an asset to be selected
6. Select asset and click ‘Continue’ to attach
7. Asset is attached and continue to create work order
Asset Tracking - Asset Edit Page Option

Attach an asset from the Edit Asset page using the ‘New Work Order’ link.

1. Navigate to Assets List
2. Click ‘Edit’ for the asset
3. Click the ‘New Work Order’ link

4. Navigates to ‘Create Work Order’ page
5. Asset is attached, continue to create work order

Note: Site, Sub-site, area, and location description will populate based on the information saved for the asset.
Asset Tracking - Asset List Option

Attach an asset from the asset list page using the ‘Create’ link found in the ‘Work Order’ link.

1. Navigate to Asset List
2. Click the ‘Create’ link in the ‘Work Order’ column
3. Navigates to ‘Create Work Order’ page
4. Asset is attached, continue to create work order

Note: Site, Sub-site, area, and location description will populate based on the information saved for the asset.

Adding Labor Cost

The 'Labor Cost' tab can be used to record labor use and costs. Labor amounts can be entered at any time throughout the lifetime of the work order, even after it has been Completed or Closed. This feature is only available for in-house staff active users.

Step 1: Click the 'Labor Cost' sub tab.
Step 2: Click the 'Add New Record' button.
Step 3: Fill all required fields and any applicable optional fields.

*All required fields are indicated with asterisk (*) symbol.

<table>
<thead>
<tr>
<th><strong>Employee</strong>*</th>
<th>Choose an in-house staff users name from the drop down.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date</strong>*</td>
<td>Select date from the calendar, notice only dates from the lifespan of the work order will display. Cannot select outside the date range of the creation date and closed date.</td>
</tr>
<tr>
<td><strong>Notes/Description</strong></td>
<td>Optional field to enter notes or a description of what the user performed for the work order.</td>
</tr>
<tr>
<td><strong>Rate Type</strong>*</td>
<td>Choose a rate type from the drop down. Defaults may be listed or customized entries created by an Administrator. See users 'Payroll Info' sub tab for further information, [please refer to Knowledge Center for further information].</td>
</tr>
<tr>
<td><strong>Hours</strong>*</td>
<td>Enter time spent on the work order. Enter in full hours or decimal format. See reference chart below in 'Additional Notes'.</td>
</tr>
<tr>
<td><strong>Labor Cost</strong></td>
<td>Total cost calculated by a set rate multiplied by hours entered. Note: Cost will be zero if the users pay rates are not setup in their 'Payroll Info' tab.</td>
</tr>
<tr>
<td><strong>Billable</strong></td>
<td>Check box if this will be a billable cost.</td>
</tr>
<tr>
<td><strong>Bill Rate</strong></td>
<td>Set a higher bill rate if necessary.</td>
</tr>
<tr>
<td><strong>Amount To Bill</strong></td>
<td>Bill Rate multiplied by hours entered will calculate to the total billable amount.</td>
</tr>
</tbody>
</table>
Step 4: Click 'Update' to save. Click 'Edit' after saving to make any update needed.

Note: Multiple users can enter hours for the same work order. Labor Costs can be entered any time after the work order is 'Approved.'

Material Cost Sub-tab

The material cost sub-tab helps track which products have been used for a work order, both inventory and non-inventory items.

Adding Inventory Items
Add an inventory item from your inventory list in the system.

Step 1: Click the 'Material Cost' sub-tab.
Step 2: Click 'Add New' button

Step 3: Click warehouse from the 'Item Storage' drop down

Step 4: Click item from the 'Item Number: Description' drop down
Step 5: After selecting an item, the item number will populate as well as the 'On Hand' count and 'Unit of Measure.' The 'Quantity' is entered and the 'Total Cost' is calculated.

Optional: If invoiced, the cost of the item can be marked up with a 'Resale' value.

*Reminder On Hand count and items are set up when adding Inventory Items in the system. Please refer to Knowledge Center for further information.

Step 6: Click 'Update' to save item to the work order, note the On Hand count now subtracts the quantity used for the work order. The 'Material Cost' will display the current material cost recorded.

Adding Non-Inventory Items

Add an item that is not in the inventory list. For example, can be used to document an item that was purchased for this work order only.

Step 1: Click the 'Material Cost' sub-tab.
Step 2: Click 'Add New' button

Step 3: Click 'Non-Inventory Item' from the 'Item Number: Description' drop down

Step 4: Enter all the required fields.
Optional: If invoiced, the cost of the item can be marked up with a 'Resale' value.

Step 5: Click 'Update' to save entry. The 'Material Cost' will display the current material cost recorded.

Note: The asterisk (*) designates the required fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Number: Description*</td>
<td>Quick entry to describe what the item purchased is</td>
</tr>
<tr>
<td>On Hand</td>
<td>Will be empty as this item is not in the inventory list</td>
</tr>
<tr>
<td>Qty*</td>
<td>Enter quantity</td>
</tr>
<tr>
<td>Unit Of Measure*</td>
<td>Choose the unit of measure from the default system list</td>
</tr>
<tr>
<td>Unit Cost*</td>
<td>Enter the unit cost</td>
</tr>
<tr>
<td>Total Cost</td>
<td>Amount calculated after 'Update' is clicked to save entry</td>
</tr>
</tbody>
</table>

**Billed Services Sub-tab**

The 'Billed Services' sub-tab can be used to record any billable service that was performed for the work order. Presets can be saved if there are recurring services used by your technicians, steps will be listed below. One time used 'Billed Services' can also be entered manually.

Preset Option:

Step 1: Click the 'Billed Services' sub-tab.

Step 2: Check the box labeled 'Include Billable Services.'

Optional: Enter a 'Not to Exceed Amount,' set a limit for users not to exceed.
Optional: Enter a 'PO Number,' can be any identifier your organization uses.

Step 3: Click 'Add New Record' button.

Step 4: Create a preset or skip to Step 8 if presets already exists. Click the grey icon box next to the 'Choose One' drop down to create a new preset service.

Step 5: Pop up window will open, click 'Add New' button.

Step 6: Select 'Sites' and 'Service Types' that will apply to the preset. Enter an optional 'Reference #'.

Enter a 'Service Description' for the preset; for example, "Service Fee" or "Maintenance Fee." Enter a set price for the service. Enter a type of 'Measure;' for example, "Each," "Hour," etc.

Step 7: Click 'Update' to save new entry or after saving an update.

Step 8: Select the preset from the 'Choose One' drop down

Step 9: Enter a quantity amount, 'QTY.' Notice any saved information from the created preset will populate after selecting it.

Step 10: Click 'Update' to save.
Additional Notes:
Notice the total amount displays in the sub-tab label after any entry is saved. Click 'Edit' to make an update to the entry. Click 'Update' to save change. Click 'Delete' if entry should be removed from the work order.

Custom Option:
Used if a preset does not apply to the billable service being documented.

Step 1: Click 'Billed Services' sub-tab
Step 2: Click 'Add New Record' button
Step 3: Enter all fields manually

Note: Required fields are indicated with an asterisk (*) symbol.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>QYT*</td>
<td>Enter quantity used</td>
</tr>
<tr>
<td>Item No. Description*</td>
<td>Enter the name of the service or item used</td>
</tr>
<tr>
<td>Ref #</td>
<td>Optional field to enter a reference number</td>
</tr>
</tbody>
</table>
Units of Measure* Enter the measure used, examples 'Each,' 'Hour,' etc.

Sale Price* Enter price for the service or item that will be billed

Total Sale Calculated after quantity and price are entered

Action Click 'Update' to save. Click 'Cancel' if you do not want to save change. Click 'Edit' to save changes made after entry is saved. Click 'Delete' to delete entry and remove from the work order.

Files Sub Tab

Step 1: Click 'Files' sub tab

Step 2: Set radio button to 'File Upload'
Step 3: Click 'Browse...' button, select file from your computer’s files
Step 4: Click 'Update' to save

OR
Step 2: Set radio button to 'Link'
Step 3: Enter URL; for example, link to a shared Google Drive Folder or Dropbox
Step 4: Click 'Update' to save

Audit Trail Sub Tab

Step 1: Click the 'Audit Trail' sub tab

Columns Explained:
Author: Indicates the User or User Role that took action, if a System action was taken that will be noted as 'System Action'
Date/Time: System is dating and time stamping the action, this information cannot be altered
Message: Detail on what action for work order was taken
Private: If 'Internal' comments are entered, column will display 'Yes'
Log Sub Tab

Step 1: Click on the 'Log' sub tab

Step 2: Set date range from the 'Date' filter

The 'Log' will display actions taken by a user for the work order. For example, if a user changes the service description the system will timestamp the action, list the user's name, and the entry made.

Columns Explained:
User: System will document the user's name that is taking an action
Timestamp: System is dating and time stamping the action taken
Message: System will document exactly what the action was
Close Out Work Orders

The last step in the work order process is the 'Close Out' action which completes the work order. There are few options that allow you to continue onto the step to 'Close Out' a work order. Below are the steps to follow for different options to get to the 'Close Out' page. Reminder this action is allowed only if your user role and permissions allow.

Option 1: Overview Page Option

From the Overview page, hover over the action button and click on the 'Close-Out' option.

![Overview Page Option](image1)

Option 2: Schedules Page Option

From the Schedules page, hover over the 'Action' button and click on the 'Close-Out' option.

![Schedules Page Option](image2)
Option 3: Print Preview Pop-Up Window Option

From the Overview page, click on the work order number to access the print preview pop-up.

Print preview pop-up appears, click on the 'Close-Out' button to access the Close-Out page.
Option 4: Detail Close-Out Option

Step 1: From the Overview page, click on the Detail Close-Out link.

Enter the desired work order number into the pop-up that appears and then click the Submit button.

Once you have accessed the Close-Out screen follow the below steps.

Step 1: On the Close-Out page, select the Completion Date/Time. Enter 'Close out Notes' or select a preset from the 'Close out Preset' drop down if available. All fields defined below and steps to create a preset.
Step 2: Click the Close-Out button to complete closing the work order. A green bubble will appear in the upper right corner of the screen confirming that the work order has been closed.

Note: If “Require Labor Cost” is enabled in General Settings the Labor Cost section will need to be completed prior to Close-Out. See ‘Adding Labor Cost’ for more information.
Adding Additional Information in the sub-tabs

Close-Out Field Explanations

*Reminder all required fields are designated with the * symbol.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completion Date/Time*</td>
<td>Select the completion date by clicking the calendar icon. Time is optional.</td>
</tr>
<tr>
<td>Close-Out Preset</td>
<td>Presets may be available when closing out work orders. If your permissions allow you may create a new preset, see steps listed below for further information.</td>
</tr>
<tr>
<td>Close-Out Notes</td>
<td>3000 spaces and characters allowed in this field. If previous field 'Close-Out Preset' was selected, the Close-out Notes field will be populated but additional information may be entered; however, it will not be saved as part of the preset.</td>
</tr>
<tr>
<td>Force Close Out</td>
<td>Check box ONLY if it is certain that edits/updates will not be needed for the work order. Force closing out a work order will immediately set it to the 'Closed' status which does not allow for the</td>
</tr>
</tbody>
</table>
Before closing out a work order, users can enter additional information for the work order in the additional sub tabs. These sub tabs are available starting from the 'Approve & Output' page up to even after the work order is in the 'Closed' status. That is, with the exception of the 'Asset Tracking' sub tab, this must be done before clicking the 'Close Out' button; this is to protect the asset's history.

See ‘Adding Additional Information in Sub Tabs’ for more information.

Sub-tab Information

Asset Tracking

Step 1: Click the 'Asset Tracking' sub-tab

Step 2: Select asset from the 'Attach Asset' drop down
*Reminder only assets located at the selected site/sub site/area will display. The asset must also have the selected service type enabled.
Step 3: Continue with next action for the work order, once the asset is selected from the drop down the asset is attached to the work order. Once selected the following information will display.

*IMPORTANT NOTE: Asset must be attached to the work order before taking the 'Close Out' action. This protects the assets records, as an asset cannot be attached if the work order is in the 'Closed' status. If the work order is in the 'Completed' status, the 'Interrupt' action can be taken which re-opens the work order which allows you to attach an asset if needed.
Adding Labor Cost

The 'Labor Cost' tab can be used to record labor use and costs. Labor amounts can be entered at any time throughout the lifetime of the work order, even after it has been Completed or Closed. This feature is only available for in-house staff active users.

Step 1: Click the 'Labor Cost' sub tab.
Step 2: Click the 'Add New Record' button.

Step 3: Fill all required fields and any applicable optional fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee*</td>
<td>Choose an in-house staff users name from the drop down.</td>
</tr>
<tr>
<td>Date*</td>
<td>Select date from the calendar, notice only dates from the lifespan of the work order will display. Cannot select outside the date range of the creation date and closed date.</td>
</tr>
<tr>
<td>Notes/Description</td>
<td>Optional field to enter notes or a description of what the user performed for the work order.</td>
</tr>
<tr>
<td>Rate Type*</td>
<td>Choose a rate type from the drop down. Defaults may be listed or customized entries created by an Administrator. See users 'Payroll Info' sub tab for further information, [please refer to Knowledge Center for further information].</td>
</tr>
<tr>
<td>Hours*</td>
<td>Enter time spent on the work order. Enter in full hours or decimal format. See reference chart below in 'Additional Notes.'</td>
</tr>
<tr>
<td>Labor Cost</td>
<td>Total cost calculated by a set rate multiplied by hours entered. Cost will be zero if the users pay rates are not setup in their 'Payroll Info' tab.</td>
</tr>
<tr>
<td>Billable</td>
<td>Check box if this will be a billable cost.</td>
</tr>
<tr>
<td>Bill Rate</td>
<td>Set a higher bill rate if necessary.</td>
</tr>
</tbody>
</table>
Amount To Bill
Bill Rate multiplied by hours entered will calculate to the total billable amount.

Step 4: Click 'Update' to save. Click 'Edit' after saving to make any update needed.

Note: Multiple users can enter hours for the same work order. Labor Costs can be entered any time after the work order is 'Approved.'

Material Cost Sub-tab

The material cost sub-tab helps track which products have been used for a work order, both inventory and non-inventory items.

Adding Inventory Items

Add an inventory item from your inventory list in the system.

Step 1: Click the 'Material Cost' sub-tab
Step 2: Click 'Add New' button

Step 3: Click warehouse from the 'Item Storage' drop down

Step 4: Click item from the 'Item Number: Description' drop down
Step 5: After selecting item the item number will populate as well as the 'On Hand' count and 'Unit of Measure.' The 'Quantity' is entered and the 'Total Cost' is calculated.
Optional: If invoiced, the cost of the item can be marked up with a 'Resale' value.
*Reminder: On Hand count and items are set up when adding Inventory Items in the system. Please refer to Knowledge Center for further information.

Step 6: Click 'Update' to save item to the work order, note the On Hand count now subtracts the quantity used for the work order. The 'Material Cost' will display the current material cost recorded.

Adding Non-Inventory Items

Add an item that is not in the inventory list. For example, can be used to document an item that was purchased for this work order only.

Step 1: Click the 'Material Cost' sub-tab.
Step 2: Click 'Add New' button

Step 3: Click 'Non-Inventory Item' from the 'Item Number: Description' drop down

Step 4: Enter all the required fields.
Optional: If invoiced, the cost of the item can be marked up with a 'Resale' value.

Step 5: Click 'Update' to save entry. The 'Material Cost' will display the current material cost recorded.

The asterisk (*) designates the required fields.

<table>
<thead>
<tr>
<th>Item Number: Description*</th>
<th>Quick entry to describe what the item purchased is</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Hand</td>
<td>Will be empty as this item is not in the inventory list</td>
</tr>
<tr>
<td>Qty*</td>
<td>Enter quantity</td>
</tr>
<tr>
<td>Unit Of Measure*</td>
<td>Choose the unit of measure from the default system list</td>
</tr>
<tr>
<td>Unit Cost*</td>
<td>Enter the unit’s cost</td>
</tr>
<tr>
<td>Total Cost</td>
<td>Amount calculated after 'Update' is clicked to save entry</td>
</tr>
</tbody>
</table>

**Billed Services Sub-tab**

The 'Billed Services' sub-tab can be used to record any billable service that was performed for the work order. Presets can be saved if there are recurring services used by your technicians, steps will be listed below. One time used 'Billed Services' can also be entered manually.

Preset Option:
Step 1: Click the 'Billed Services' sub-tab.

Step 2: Check the box labeled 'Include Billable Services.'
Optional: Enter a 'Not to Exceed Amount,' set a limit for users not to exceed.
Optional: Enter a 'PO Number,' can be any identifier your organization uses.
Step 3: Click 'Add New Record' button.
Step 4: Create a preset or skip to Step 8 if presets already exist. Click the grey icon box next to the 'Choose One' drop down to create new.

Step 5: Pop up window will open, click 'Add New' button.

Step 6: Select 'Sites' and 'Service Types' that will apply to the preset. Enter an optional 'Reference #.' Enter a 'Service Description' for the preset; for example, "Service Fee" or "Maintenance Fee." Enter a set price for the service. Enter a type of 'Measure', for example "Each," "Hour," etc.

Step 7: Click 'Update' to save new entry or after saving an update.

Step 8: Select the preset from the 'Choose One' drop down

Step 9: Enter a quantity amount, 'QTY.' Notice any saved information from the created preset will populate after selecting it.

Step 10: Click 'Update' to save.
**Additional Notes:**
Notice the total amount displays in the sub-tab label after any entry is saved. Click 'Edit' to make an update to the entry. Click 'Update' to save change. Click 'Delete' if entry should be removed from the work order.

**Custom Option:**
Use if a preset does not apply to the billable service being documented.

**Step 1:** Click 'Billed Services' sub-tab  
**Step 2:** Click 'Add New Record' button  
**Step 3:** Enter all fields manually

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>QTY*</td>
<td>Enter quantity used</td>
</tr>
<tr>
<td>Item No. Description*</td>
<td>Enter the name of the service or item used</td>
</tr>
<tr>
<td>Ref #</td>
<td>Optional field to enter a reference number</td>
</tr>
<tr>
<td>Units of Measure*</td>
<td>Enter the measure used, examples 'Each,' 'Hour,' etc.</td>
</tr>
<tr>
<td>Sale Price*</td>
<td>Enter price for the service or item that will be billed</td>
</tr>
<tr>
<td>Total Sale</td>
<td>Calculated after quantity and price are entered</td>
</tr>
<tr>
<td>Action</td>
<td>Click 'Update' to save.</td>
</tr>
</tbody>
</table>

[Diagram of Work Order Management interface]
Click 'Cancel' if you do not want to save change. Click 'Edit' to save changes made after entry is saved. Click 'Delete' to delete entry and remove from the work order.

Files Sub Tab

Step 1: Click 'Files' sub tab

Step 2: Set radio button to 'File Upload'
Step 3: Click 'Browse...' button, select file from your computer's files
Step 4: Click 'Update' to save

OR
Step 2: Set radio button to 'Link'
Step 3: Enter URL; for example, link to a shared Google Drive Folder or Dropbox
Step 4: Click 'Update' to save

Audit Trail Sub Tab

Step 1: Click the 'Audit Trail' sub tab

Columns Explained:
Author: User Role or System documented on who or what is taking the action
Date/Time: System is dating and time stamping the action, this information cannot be altered
Message: Detail on what the action taken was for the work order
Private: If 'Internal' comments are entered column will display 'Yes'

Log Sub Tab

Step 1: Click on the 'Log' sub tab.

Step 2: Set date range from the 'Date' filter.

The 'Log' will display actions taken by a user for the work order. For example, if a user changes the service description the system will timestamp the action, list the user’s name, and the entry made.

Columns Explained:
User: System will document the user’s name that is taking an action
Timestamp: System is dating and time stamping the action taken
Message: System will document exactly what the action was
Create a Close-Out Preset

Step 1: Click the grey icon box next to the 'Close-out Preset' drop down field.

Step 2: Click the 'Add New' button in the pop-up window. All required fields are designated with a (*) symbol.

Step 3: Enter all required fields and optional fields that are applicable.

Field Definitions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task ID</td>
<td>This field will be blank when creating a preset; once the 'Update' button is clicked the system automatically generates a numerical id for this preset.</td>
</tr>
<tr>
<td>Sites*</td>
<td>Check boxes for sites this preset should be available to. Select 'All' box to apply to all sites.</td>
</tr>
<tr>
<td>Services*</td>
<td>Check boxes for service types this preset should be available to. Select 'All' box to apply to all sites.</td>
</tr>
<tr>
<td><strong>Display Name</strong>*</td>
<td>Enter the preset name in the 'Display Name' field.</td>
</tr>
<tr>
<td>------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Enter 'Description' which has a 3000 spaces and characters max.</td>
</tr>
<tr>
<td><strong>Budget</strong></td>
<td>Optional field, enter a time estimation for the work to be done.</td>
</tr>
<tr>
<td><strong>Action</strong></td>
<td>'Update' - Button will save the preset or save an edit made to an existing one. 'Cancel' - Button will cancel an edit being made. 'Delete' - Will appear after the preset is saved. Allows you delete the preset if it will no longer be used.</td>
</tr>
</tbody>
</table>

Step 4: Select a preset from the 'Close-Out Preset' drop down.
Step 5: Close-out Notes field will be populated with the preset information but additional information can be saved; however, it will not be saved as part of the preset.