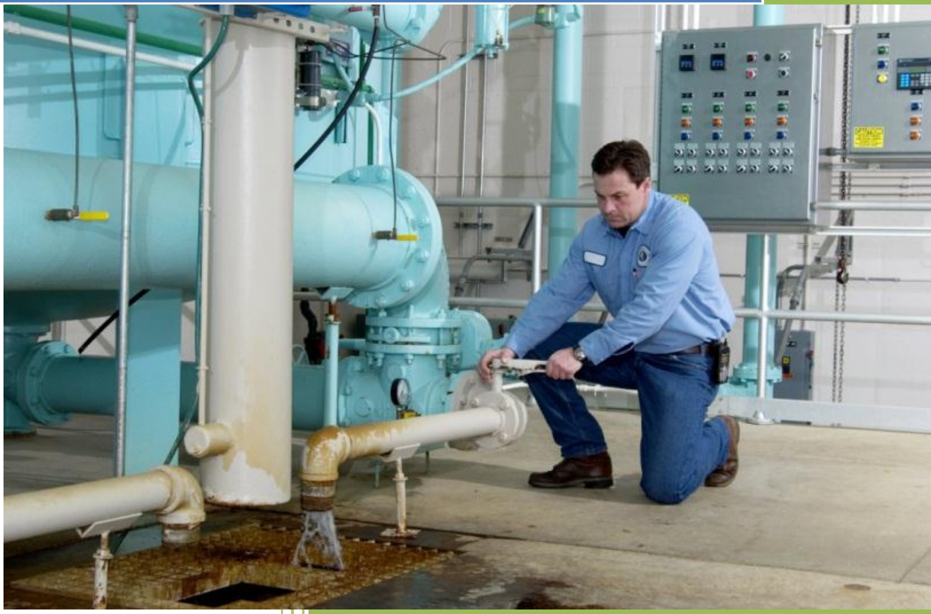
TeamWORKS

5.0 User Guide

C/S Work Order Manager



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Work Order Manager

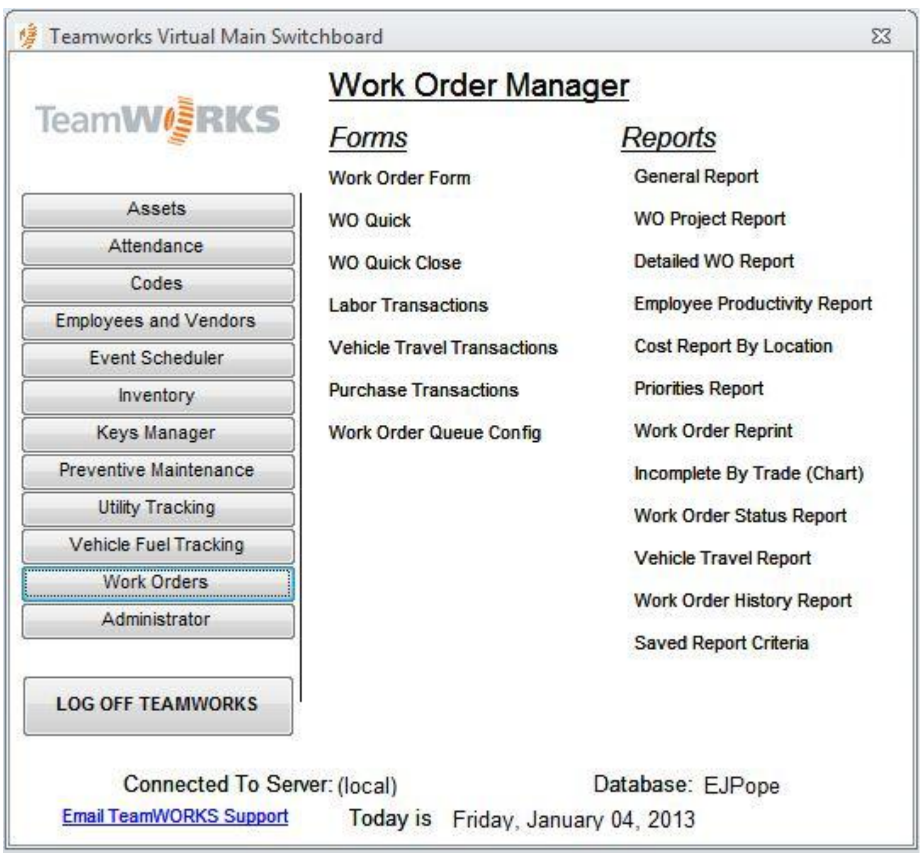
TeamWORKS Work Order Manager is primarily used to fully manage work orders that are received either manually or by Remote Request. By using the Work Order Manager, users can keep track of work orders tied to specific categories like:

- Assigned To Employee
- Trades
- Projects
- Specific Locations
- Departments
- Vandalism
- Priority
- Budgets, and
- Other Purpose Codes

You can also track multiple types of transactions like:

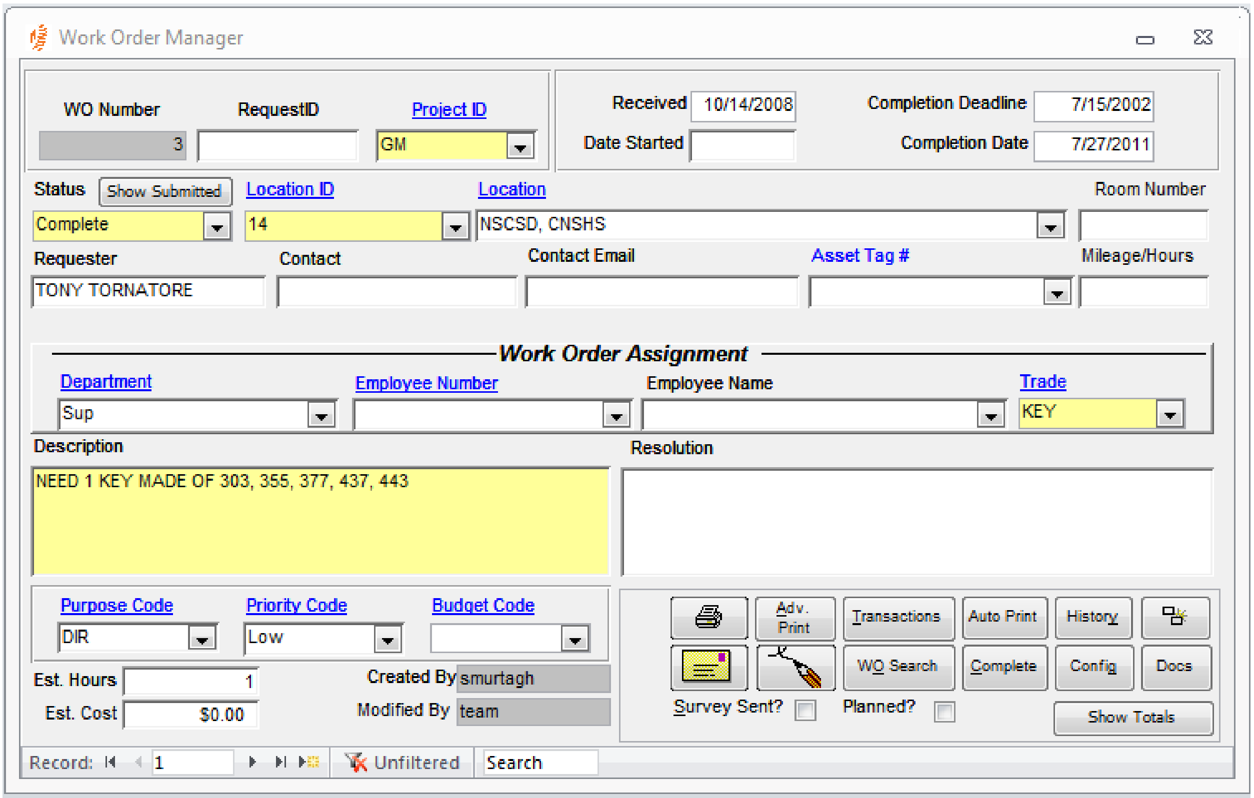
- Labor
- Inventory issued from Warehouse
- Purchase transactions from outside vendors
- Vehicle Travel

…..to have a 'true' and accurate cost of completing a work order request.



Forms

Work Order Form



Text fields - - you can type freely into this field. Most text fields are a 50 character limit.

Drop-down box - - you must select an item from the list. You cannot enter a value that is not in the list into this box. If you begin typing, the system will auto-fill the first option matching the characters you've typed. If you need to create a new item, you can single-click on the option. Once you've entered your new code, close that window and it should be added to your dropdown list.

Note: if your new code does not show in your list, with your curser in the appropriate field, you can go to the Records Menu and the select the Refresh Option.

*** indicates a System required field.**

WO Number – this is a system generated field. On a new work order, the WO Number will indicate '(AutoNumber)' then go blank once the new work order data is being entered. Once the record is saved, the system auto-assigns the next work order number in succession.

RequestID – this is a **NUMERIC** field only. It can be used to reference another work order number (tie to it) or reference an Event Schedule ID.

*** Project ID –** this field is used for tracking specific types of projects like General Maintenance, Preventive Maintenance or H.S. Renovation 2001. To create a new project, simply click on the Project ID link above the field to add a new project. Be aware that you may only want to create new projects when you will have **several** work orders tied to that project.

Entering Dates: you can enter dates 3 different ways:

- Type in the date (i.e. 6/6/05).
- Double Click on the field and click on the appropriate date.
- Type the letter'd' into that field. This will insert today's date in the field.

Received – this defaults to today's date when creating new work orders. You can change this value.

Date Started – this allows you to track the date you began work on the current work order.

Completion Deadline – used for indicating if a work order needs to be completed by a certain date.

Completion Date – the date the work order was completed. If you have a date in this field, your status **must** be 'Complete' or 'Closed'.

*** Status –** indicates the current status of the work order. This will change through the lifecycle of the current work order.

Status Options:

- **Approved** – indicates that the work requested has been approved. If you print a work order with an Approved status, the system will automatically change the status to Incomplete.
- **Complete –** indicates that the work order has been completed. You can still enter transactions against a Completed work order.
- **Duplicate –** indicates a work order has already been created for this requested work.
- **Hold –** indicates that the work order has been reviewed and work on this will be postponed for various reasons (i.e. turning this into a summer project, no resources to do the work yet, tradesman who will do the work is out on vacation).
- **Incomplete –** indicates work in progress.
- **Closed –** indicates the work has been completed. Once a work order is Closed, transactions against this work **cannot** be posted unless by a System Administrator.
- **Material Delay –** indicates waiting on parts or materials to complete the requested work.
- **Rejected –** indicates the work requested will not be approved, hence, will not be done.

- **Submitted –** indicates a ‘new’ work order that is waiting to be reviewed. *NOTE: if you are using Remote Request – as long as the current status is ‘Submitted’, the remote site can make changes to the work request. Once taken off ‘Submitted’ Status, this locks them from making changes to the work order request.*
- **Void –** indicates a ‘dead’ work order. (i.e. after submitting the work request, the requestor fixed their problem).

Show Submitted Button – clicking this button will filter out ONLY submitted work orders.

*** Location Code –** the code or shortcut for the location needing the work to be done.

Location – the full name of the location needing the work to be done.

Room Number – indicates the room number for the work request. This is an alphanumeric field allowing for 50 characters. If your path structure is down to the room level, then this field will not apply to you. You can show/hide this field in the System Configuration form from the Administrator Button.

Requester – indicates the name of the person requesting the work.

Contact – indicates the name of the *actual* person who initiated the request. If the tradesman has questions regarding this work request, this is the name he/she should look for (i.e. Work Description says “lights are out in my room”. Worker arrives and lights are working. He/she should try to find the contact person).

Contact Email – indicates the email address of the contact who initiated the request.

Asset Tag # - indicates the asset this work order is tied to. This field if filtered by the location selected for this work order. Only assets from the Asset Main Form tied to this location will show.

NOTE: If you want to track a service history for any given asset, you MUST select the asset tag number from this drop-down list.

Mileage/Hours – indicates the mileage or hours on the asset being serviced.

Department – indicates the department this work order is assigned to. When a department is selected, the Employees assigned to that department in the Employee Main Form are filtered out. If the department is left blank, then **ALL** employees show.

Employee Number – indicates the employee ID of the tradesman assigned to do this work. Selecting the Employee ID will auto-fill the Employee Name and vice versa.

* You can also assign work orders to Vendors that have ‘Allow Work Order Assignment’ checked on the Vendor main form.

Employee Name – indicates the Name of the tradesman assigned to do this work. Selecting the Employee Name will auto-fill the Employee ID and vice versa.

*** Trade –** indicates the trade required to complete the work order. If the work request will take multiple trades, it is suggested that you create a separate work order(s).

*** Description –** shows a description of the problem/issue for this work request.

Resolution – indicates what was done to complete the request.

Purpose Code – used for a variety of different tracking options.

Can be used to track work orders for:

- Vandalism
- Food Service
- Athletics
- Capital Improvements
- ADA Compliancy

Priority Code – indicates a priority for the requested work. (i.e. H – High, M – Medium, L – Low)

Budget Code – indicates the budget this work order cost will be pulled from.

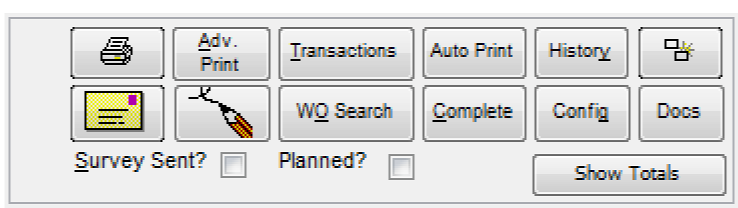
Estimated Hours – indicates the estimated amount of time to complete the work order.

Estimated Cost – indicates the estimated cost to complete the work order.

Created By – indicate the original creator of the work order request and is based on login name. Click this field to get the Date Created date/time stamp.

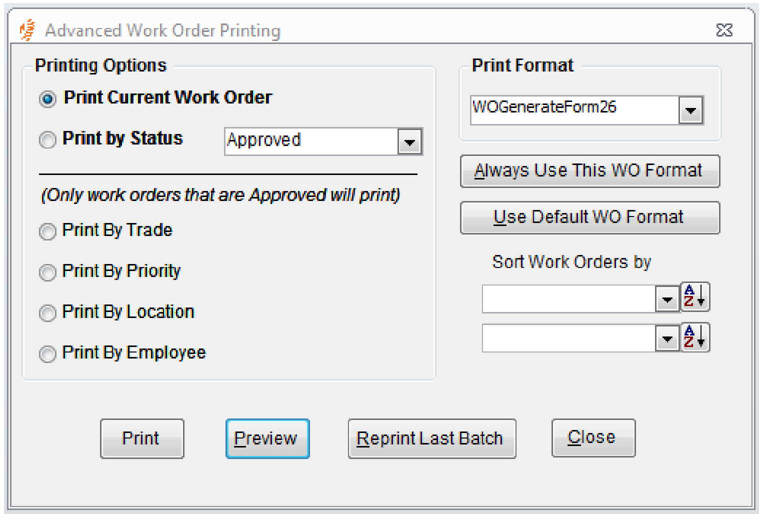
Modified By – indicated the **LAST** person to make a change to this work order. Does not track history of changes made and is based on login name. Click this field to get the Date Modified date/time stamp.

Icons



Printer Icon – click here to print the current work order using the Default work order print format. If the status is Approved, the system will automatically change the status to Incomplete, indicating work in progress.

Adv. Print – click here to go to Advanced Printing Options.



- Print Current Work Order – will print the current work order with the Print Format selected.
- Print By Status – will print ALL work orders with the status selected from this drop-down option.
- Print By Trade – will print only Approved work orders for the selected Trade.
- Print By Priority – will print only Approved work orders for the selected Priority.
- Print By Location – will print only Approved work orders for the selected Location.
- Print By Employee – will print only Approved work orders for the selected Employee.
- Print Format – Select the work order format to print. You can Preview the selected format prior to printing.
- Always use This WO Format – this is based on Login. When you click this button, it 'ties' this work order format to your local PC.
- Use the Default WO Format – changes the printed WO format back to the Default WO format which is set in System Configuration.
- Sort Work Order By – allows you to sort printed work orders.
- Print – prints the work order based on the selected criteria on the form.
- Preview – allows you to preview your work order prior to printing.
- Reprint Last Batch – in case of printer failure or paper jams, you can reprint your last work orders printed.
- Close **–** Closes the Advanced Work Order Printing Form.

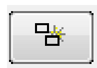
Transactions - allows you to track work orders costs for:

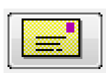
- Labor
- Inventory Issued for work order
- Purchases made for the work order from outside vendors
- Vehicle Travel
- Transactions Totals

NOTE: See detailed Transactions instructions on page 13 of this User Guide.

Auto Print - by clicking this button, when entering a **new work** order, the system will automatically print the work order using the Default Work Order Format when advancing to the next work order.

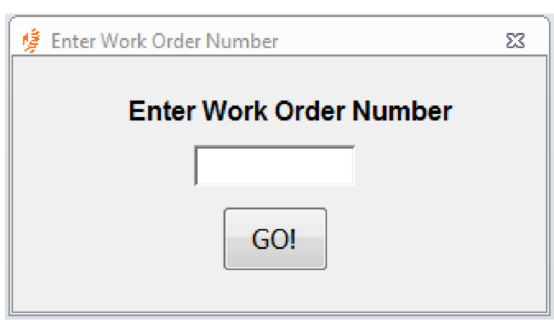
History - ability to view history records for specific work orders.

Duplicate Work Order – click this button  (shortcut is Al t+ R) to create a new work order with all of the same information except for the location. Make sure the work order has been assigned a work order number prior to clicking this button. Great shortcut to creating several work orders that have the save 'everything' but different locations.

Email WO -  ability to email a work order to anyone. This uses your default email application whether you use Outlook, Outlook Express, Lotus Notes, or GroupWise.

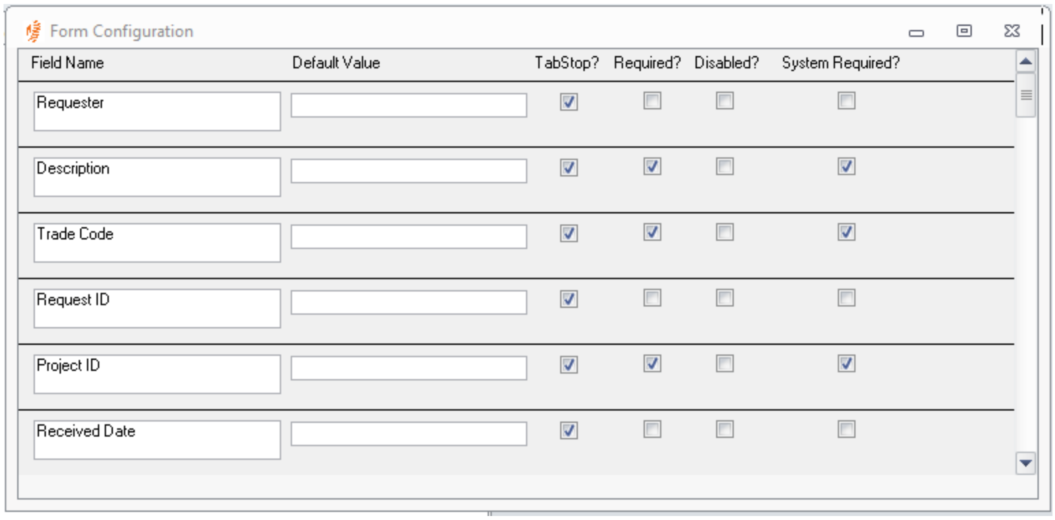
Survey/Survey Sent? - When a work order status is Complete, you will see these options. Clicking the survey button will open up a default Survey that you can email your customer to basically ask 'how did we do?' This creates an RTF file that can be opened with MS Word. The customer can then print the Survey and fax/mail back to maintenance. The Survey Sent check box option can be checked once the survey has been sent, so it won't be sent more than once.

WO Search - allows you to enter a WO number to go right to it. The following window appears. Shortcut is Alt + O



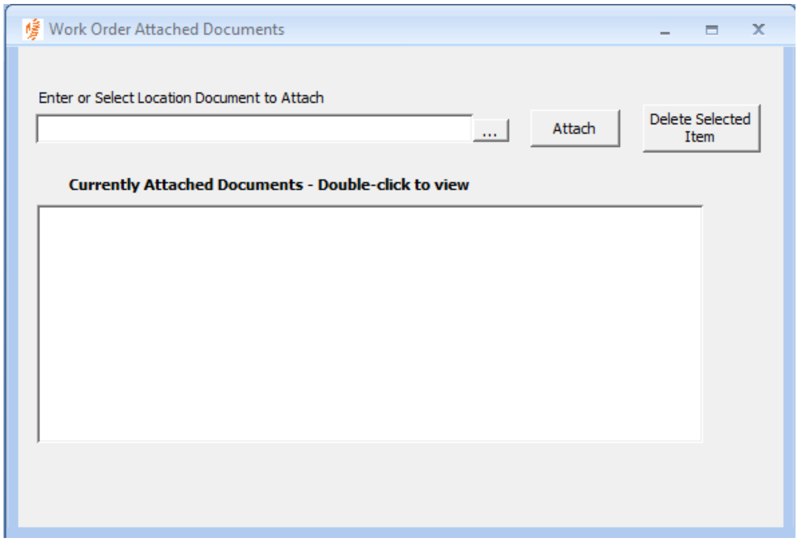
Complete - clicking here will put today's date in the Completion Date field, change the Work Order status to Complete and Place your cursor in the Resolution field. Shortcut is Alt + C

Config – click this button to go the configuration options for the work order main form. The Config form allows users to specify default values, set tab stops and more.



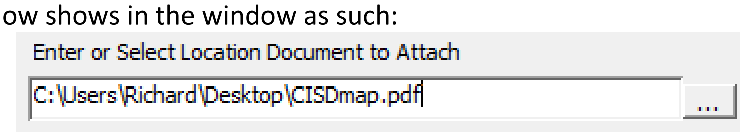
- **Field Name** – shows the field name for the options.
- **Default Value** – specify a default value for any field. For date fields, type in the word Date to default this field to today's date for new records.
- **TabStop?** – check this box to make this a tab stop field. Uncheck to skip field.
- **Required?** – check this box to make this field a required field when filling out a form. Background will change colors to identify a required field.
- **Disabled?** – check this box to disable a field (gray out) so no data can be entered into it.
- **System Required?** – this column identifies which fields are system required fields and cannot be changed.

Docs – click this button to attach a document to the work order. This document will be viewable to other users including Remote Request as long as they have the proper application to open the file. *NOTE: Set up is required by your TeamWORKS System Administrator.*

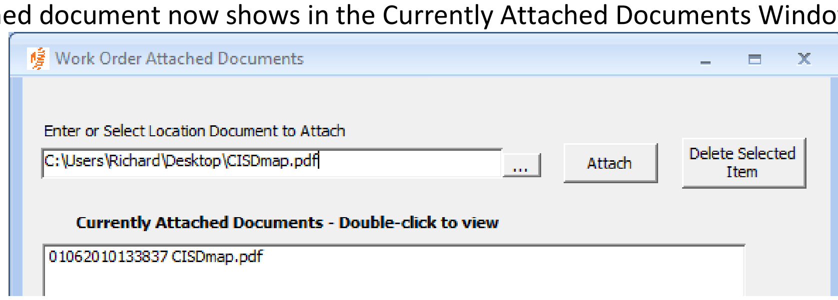


To attach a document to a work order:

1. Click the Docs button on the Work Order Main form
2. Click the Ellipse button (with 3 dots) which will bring up a browse window
3. Browse to the file you want to attach and double click the file
4. File Path now shows in the window as such:



5. Click the Attach Button which will attach this file to the work order number. You can attach multiple files and file types to any given work order.
6. Attached document now shows in the Currently Attached Documents Window



NOTE: If you receive an error indication Invalid Location, your Document Storage Location is either not set up or is invalid. Document Storage Location is set up under the Administrator button from the Switchboard.

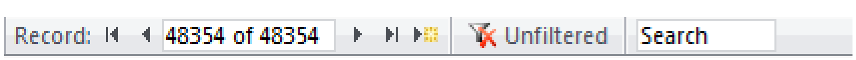
7. To Delete an attached document, select it from the Currently Attached Documents window and click the Delete Selected Item button.

Show Totals – this button will give a quick view of the transaction totals posted against this work order.

Planned – this check box option allows user to hide or show this current work order on Remote Request.

Users may want to 'hide' certain work requests as well as PM work orders.

Navigation Bar - - use the navigation bar to cycle through all of your work orders.



-  - takes you to the first record in the recordset.
-  - takes you to the previous record in the recordset.
-  - takes you to the next record in the recordset.
-  - takes you to the last record in the recordset.
-  - takes you to a new work order.
- 

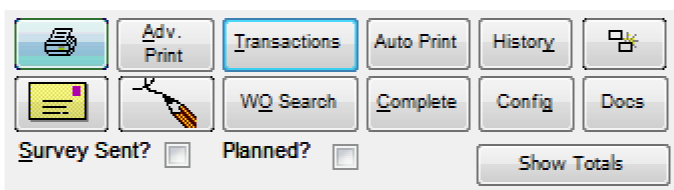
- indicates which record you are on.
- 

- indicates how many total work orders you have in the system.
- 

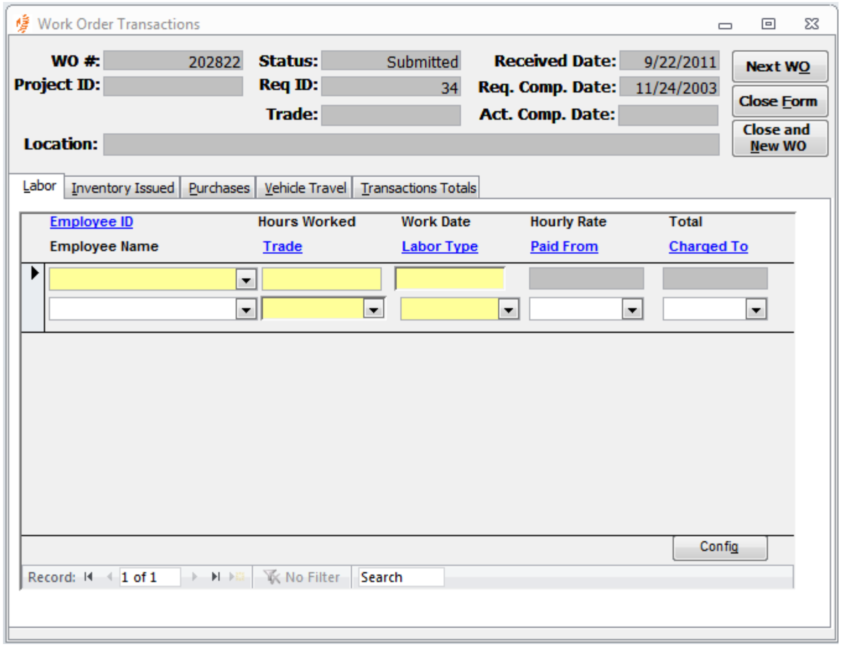
- indicates you are working with a filtered set.

Entering Work Order Transactions

Transactions allow you to track work order costs from labor, inventory issued, purchases and vehicle travel. Click the Transactions icon on the Work Order form



This will prompt the below Work Oder Transaction form



WO #: - shows which WO you are entering transactions for

Status – indicates the current status of the work order

Received Date – indicates the date the work order was created

Project ID – indicates specific types of projects that may have several work orders tied to it

Req ID - this is a **NUMERIC** field only. It can be used to reference another work order number

Req. Comp. Date - used for indicating if a work order needs to be completed by a certain date

Trade -indicates the trade required to complete the work order

Act. Comp. Date - the date the work order was completed.

Location - the full name of the location needing the work to be done

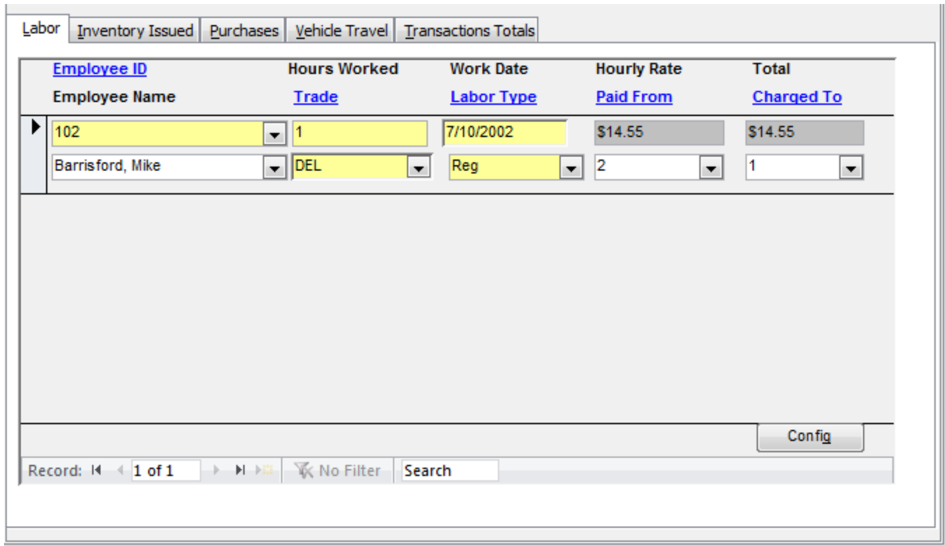
Next WO – click this button to close the transactions form and opens the WO Search Form to enter transactions for another work order

Close Form – Closes the Transactions form and takes you back to the work order you were working with

Close and New WO – closes the transactions form and takes you to a New Work Order record

Labor Transactions – Shortcut is Alt + L

Keep track of tradesmen who work on this work order. This form allows for multiple entries for a single work order



Employee ID – Enter the Employee ID of the person(s) who worked on this work order. Entering an Employee ID will also populate the Employee Name field and vice versa

Hours Worked – Enter the number of hours worked. It does not have to be a whole number (i.e. 3.25)

Work Date – Enter the date the worker worked on this work order. If this worker worked on the work order multiple days, enter each labor transaction separately. Double Click the date field to select the date from a calendar

Hourly Rate – Auto populated field that looks at the workers labor rate which is set in the Employee Main form. It will adjust based on the Labor Type selected.

Total – auto populated field that calculates Hours Worked times Hourly Rate

Employee Name – Enter the Employee's name who worked on the work order. Entering an Employee Name will also populate their Employee ID.

Trade – will default to the tradesman primary trade if selected in the Employee Form. Only the trades assigned to this worker will show in the drop-down list. To add a new Trade for the selected employee, click on the Employee ID link after the Employee ID field is populated

Labor Type – select from the drop-down list the Labor Type for this work. Regular Time and Over time are common labor types. These are populated in the Employee Main Form

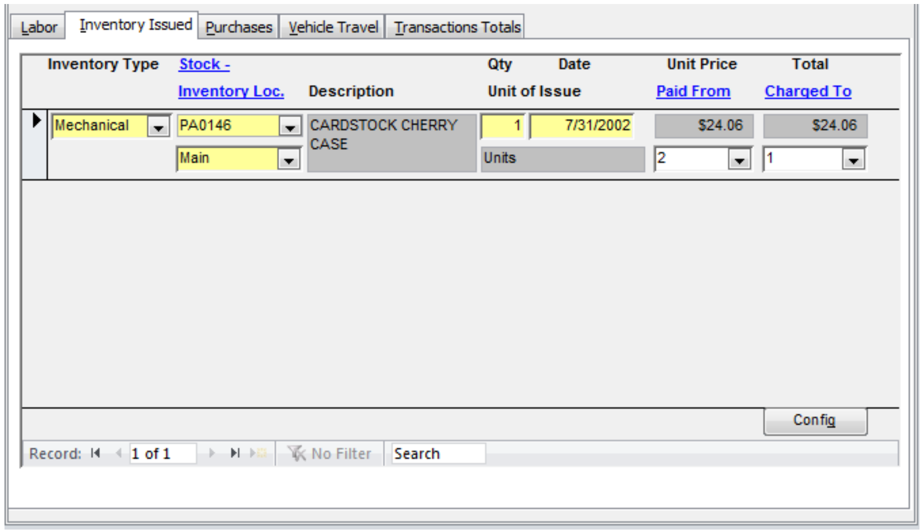
Paid From – system will **deduct** from this account the total labor cost for this transaction

Charged To – system will **add** to this account the total labor cost for this transaction

Config – this button allows you to set default values and tab stops on the labor transactions form

Inventory Issued – Shortcut is Alt + I

Keep track of Inventory that was issued from a warehouse to this work order.



Inventory Type – Select Mechanical, Custodial or Instructional. This will filter out the Stock # field based on your selection

Stock # - enter the stock number or select it from the drop-down list.

Inventory Loc. – enter or select the Inventory Location from which this inventory was pulled.

Description – auto populates when the Stock # is selected

Qty – Enter the quantity that was issued for this stock item. You can enter decimal points to indicate ½ of a unit issued

Date – enter the date the inventory was issued. Use the calendar to select the date

Unit Price – auto populated field indicating the cost per unit for this item

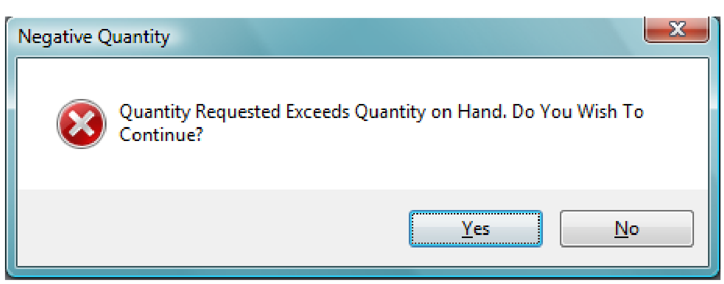
Total – indicates the total dollars for this inventory transaction

Unit of Issue – auto populated field indicating the unit of issue for the selected Stock item

Paid From – system will **deduct** from this account the total cost for this transaction

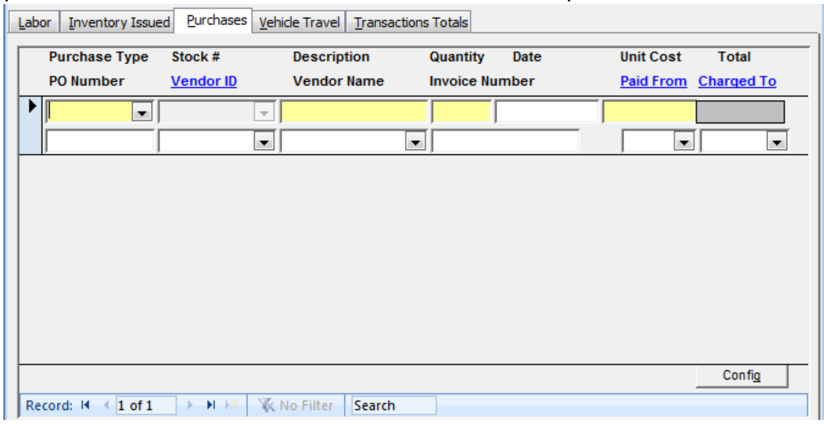
Charged To – system will **add** to this account the total cost for this transaction

NOTE: if you try to issue a quantity greater than what you have in stock for that item, you will be prompted with the following message. See your TeamWORKS System Administrator to set inventory to allow a negative balance.



Selecting **Yes** will take your inventory balance for that item into a negative. Selecting No will zero out your Quantity field and allow you to modify your Quantity issued.

Purchase Transactions – shortcut is Alt + P
Keep track of any purchases made from a vendor in order to complete this work order



Purchase Type – Select the purchase type for this transaction

- **Mechanical –** select this option if this is a mechanical item you usually carry in your warehouse, but might be out.
- **Custodial –** select this option if this is a custodial item you usually carry in your warehouse, but might be out.
- **Instructional -** select this option if this is an instructional item you usually carry in your warehouse, but might be out.
- **Others –** select this option if this is an item that is not in my Inventory list. Perhaps a specialty item.
- **Service –** select this option if you purchased a service (i.e. outsource pest control work) to complete this work.

Stock # - if you selected Others or Service, you are not required to enter a Stock #

Description – if you selected Others or Service, this becomes an 'open' text field so you can type in a description of what you purchased. Otherwise, it will auto populate once the Stock # is entered.

Quantity – enter the quantity of the item(s) you purchased. If you purchased multiple items for this one work order, you can summarize what you purchased by indicating Quantity as 1 and Unit Cost as the TOTAL amount spent.

Date – enter the date of the purchase transaction

Unit Cost – enter the Unit Cost of the item(s) purchased

Total – auto populated field calculating Quantity times Unit Cost

PO Number – allows you to keep track of a PO Number used for this purchase

Vendor ID – Enter or select the Vendor ID from the drop-down list. Entering the Vendor ID will populate the Vendor Name and vice versa

Vendor Name - Enter or select the Vendor Name from the drop-down list. Entering the Vendor Name will populate the Vendor ID and vice versa

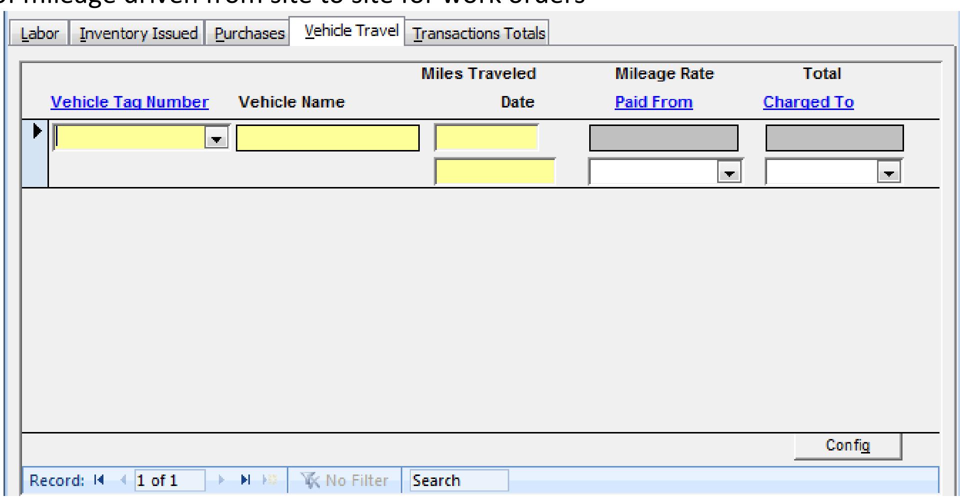
Invoice Number – enter the Invoice Number if available

Paid From – system will **deduct** from this account the total cost for this transaction

Charged To – system will **add** to this account the total cost for this transaction

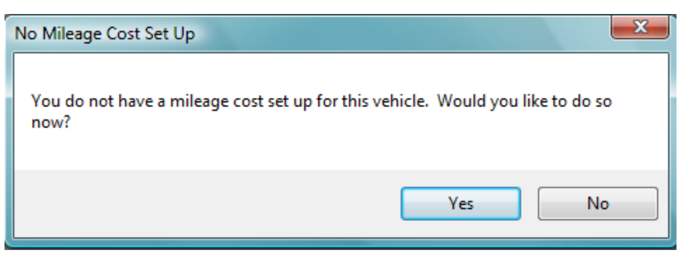
Vehicle Travel Transactions – Shortcut is Alt + V

Keep track of mileage driven from site to site for work orders



Vehicle Tag Number – enter or select the Tag Number for the vehicle(s) used for this work order

*If you select a vehicle that has not been assigned Miles/Gallon yet, you will be prompted with the following message:



Selecting Yes will take you to the Asset Manager form where you can enter Mileage Cost. Selecting No will allow you to continue entering data but will not show a vehicle cost.

Vehicle Name – auto populates when the Vehicle Tag Number is selected

Miles Traveled – enter the miles driven

Mileage Rate – auto populated field that indicates the mileage rate for the vehicle specified in the Tag Number field. This rate is set in the Asset Manager Main Form under the Vehicle Info tab

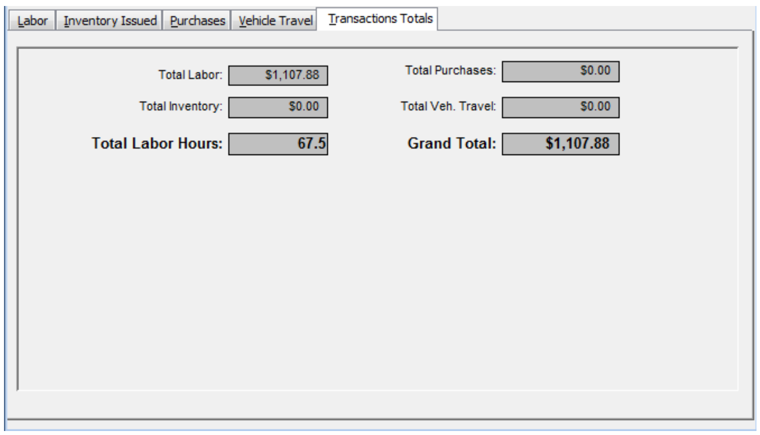
Total – auto populated field that calculates the Miles Traveled times Mileage Rate

Date – enter the date of travel for this transaction

Paid From – system will **deduct** from this account the total cost for this transaction

Charged To – system will **add** to this account the total cost for this transaction

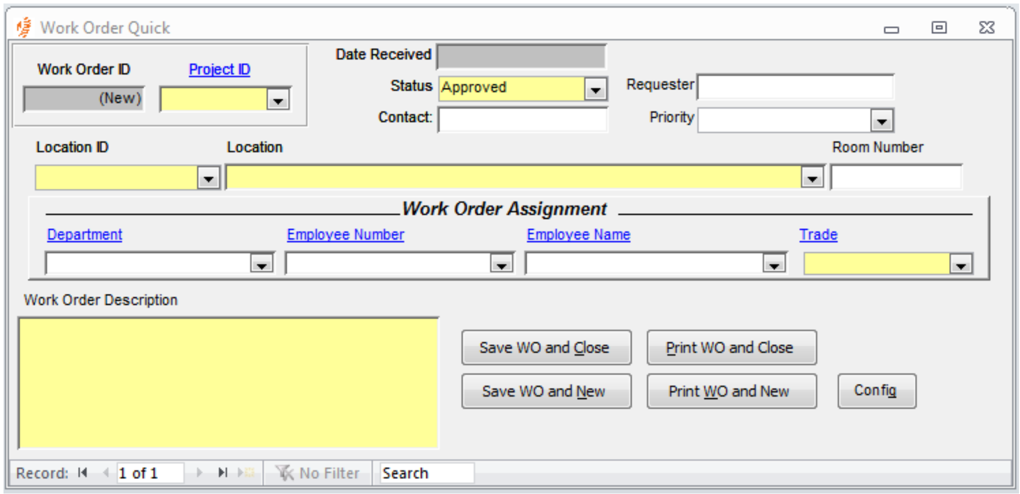
Transactions Total – Shortcut is Alt + T



Shows Total for Labor, Inventory Issued, Purchases, Vehicle Travel and Total Labor Hours giving a Grand Total to complete the work requested.

WO (Work Order) Quick

The Work Order Quick Form is used primarily for quickly creating/generating work orders. It is not a good tool to manage existing work orders. The form is simpler and less busy than the Work Order Main form.



*NOTE: * indicates a System Required field*

Work Order ID – this is a system generated field. On a new work order, the WO Number will indicate '(AutoNumber)' then go blank once the new work order data is being entered. Once the record is saved, the system auto-assigns the next work order number is succession.

*** Project ID –** this field is used for tracking specific types of projects like General Maintenance, Preventive Maintenance or H.S. Renovation 2001. To create a new project, simply click on the Project ID link above the field to add a new project. Be aware that you may only want to create new projects when you will have **several** work orders tied to that project.

Date Received – this defaults to today's date when creating new work orders. You can change this value.

*** Status –** indicates the current status of the work order. This will change throughout the lifecycle of the current work order.

Different Statuses:

- **Approved** – indicates that the work requested has been approved. If you print a work order with an Approved status, the system will automatically change the status to Incomplete.
- **Complete –** indicates that the work order has been Completed. You can still enter transactions against a Completed work order.
- **Duplicate –** indicates a work order has already been created for this requested work.

- **Hold –** indicates that the work order has been reviewed and work on this will be postponed for various reasons (i.e. turning this into a summer project, no resources to do the work yet, tradesman who will do the work is out on vacation).
- **Incomplete –** indicates work in progress.
- **Closed –** indicates the work has been completed. Once a work order is Closed, transactions against this work **cannot** be posted unless by a System Administrator. The work order is not locked from any more data entry.
- **Material Delay –** indicates waiting on parts or materials to complete the requested work.
- **Rejected –** indicates the work requested will not be approved, hence, will not be done.
- **Submitted –** indicates a 'new' work order that is waiting to be reviewed. *NOTE: if you are using Remote Request – as long as the current status is 'Submitted', the remote site can make changes to the work request. Once taken off 'Submitted' Status, this locks them from making changes to the work order request.*
- **Void –** indicates a 'dead' work order. (i.e. after submitting the work request, the requestor fixed their problem)

  NOTE: Additional Statuses may be created by your TeamWORKS System Administrator

Contact – indicates the name of the *actual* person who initiated the request. If the tradesman has questions regarding this work request, this if the name he/she should look for (i.e. Work Description says "lights are out in my room". Worker arrives and lights are working. He/she should try to find the contact person)

Requester – indicates the name of the person requesting the work.

Priority – indicates a priority for the requested work. (i.e. H – High, M – Medium, L – Low)

*** Location ID –** the code or shortcut for the location needing the work to be done.

Location – this indicates the full name of the location needing the work to be done.

Room Number – indicates the room number for the work request. This is an alphanumeric field allowing for 50 characters. If your path structure is down to the room level, then this field will not apply to you. You can show/hide this field in the System Configuration form from the Administrator Button.

Department – indicates the department this work order is assigned to. When a department is selected, the Employees assigned to that department in the Employee Main Form are filtered out. If the department is left blank, then **ALL** employees show.

Employee Number – indicates the employee ID of the tradesman assigned to do this work. Selecting the Employee ID will auto-fill the Employee Name and vice versa.

* You can also assign work orders to Vendors that have 'Allow Work Order Assignment' checked on the Vendor main form.

Employee Name – indicates the Name of the tradesman assigned to do this work. Selecting the Employee Name will auto-fill the Employee ID and vice versa.

*** Trade –** indicates the trade required to complete the work order. If the work request will take multiple trades, it is suggested that you create a separate work order(s).

*** Work Order Description –** shows a description of the problem/issue for this work request.

Save WO and Close – saves the current work order and closes the form.

Save WO and New – saves the current work order and goes to a new record (to enter a new WO).

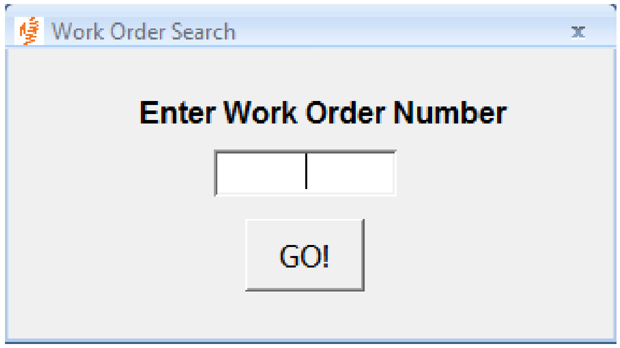
Print WO and Close – Prints the work order and closes the form.

Print WO and New – Prints the work order and goes to a new record (to enter a new WO).

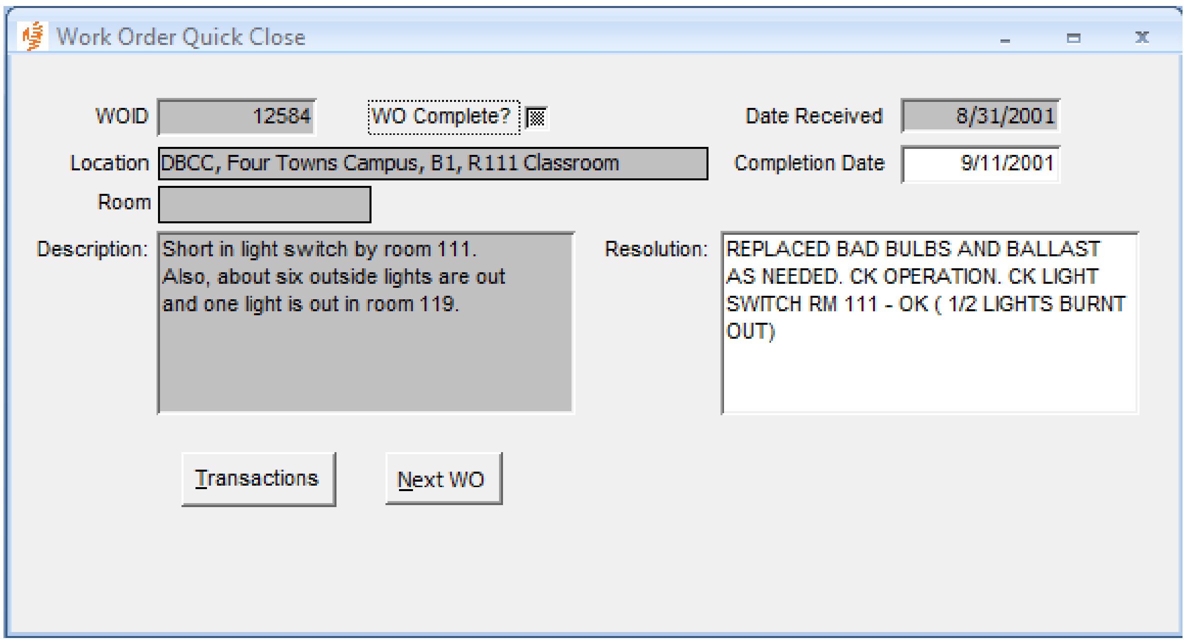
Config – shows configuration options on the Work Order Quick Form.

WO (Work Order) Quick Close

WO Quick close is used to close (complete) work orders in the system. Through Quick Close, you can mark the WO as Complete, enter a Resolution and enter all types of transactions. Clicking the WO Quick Close link from the Main Switchboard gives you the following form:



Enter the WO Number then click GO!



WOID – indicates the work order you are closing out.

WO Complete? – click this check box if the work order is complete. It will change the status to Complete.

Date Received – indicates the Date the work order was received.

Location – indicates the Location for the work order.

Completion Date – enter or select from the Calendar, the date the work order was completed.

Room – indicates the Room Number for the work order.

Description – indicates the Description of the work requested.

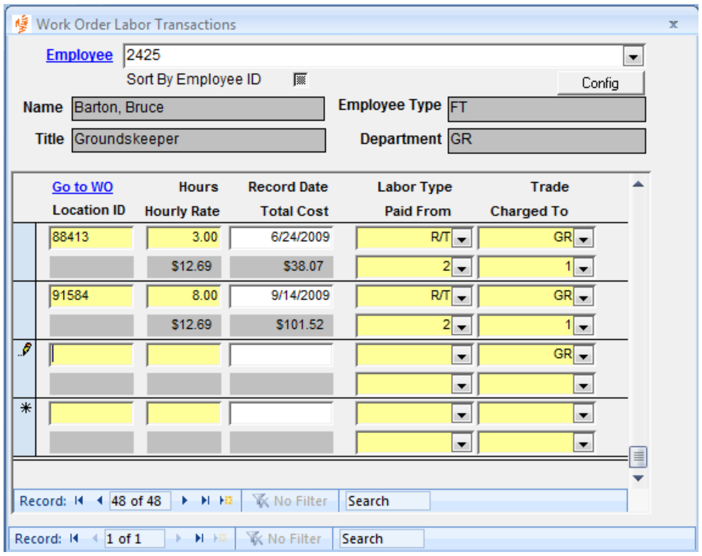
Resolution – enter the resolution, or what was done to repair or fix the work order.

Transactions Button - click here to enter transactions for Labor, Inventory Issued, Purchases, and Vehicle Travel.

Next WO Button - click here when you've finished one work order and are ready to close out the next one.

Labor Transactions

The Labor Transactions Form allows you to enter labor transactions without having to do so through the Work Order Main form. This is a fast and efficient way to enter labor when a person turns in several completed work orders at the end of the day. This will only allow you to log labor transactions.



Employee – enter or select the Employee ID of the individual for which you will be entering labor transactions. After making your selection, you can click on the Employee link and the system will take you to the selected worker's employee file

Sort By EmployeeID – check this box if you want the drop down list to be sorted by Employee ID

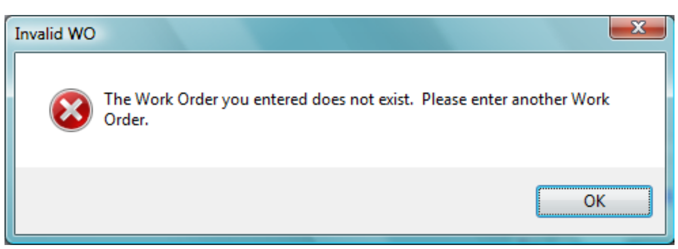
Name – indicates the Name of the employee. Auto populated field

Employee Type – indicates the Employee's Type. Auto populated field

Title – indicates the Employee's Title. Auto populated field

Department - indicates the Employee's Department. Auto populated field

Go to WO – enter the Work Order ID you will be adding labor to. Once populated, you can click on the Go to WO link to take you directly to that work order on the Work Order Main form. Entering a non-existent Work Order will yield the following screen:



Hours – enter the number of hours (time) the worker put in on this work order. If you are entering different days worked for the same work orders, please enter as another transaction

Record Date – enter the date for the labor transaction

Labor Type - enter the Labor Type. Usually Regular Time or Overtime

Trade – enter the Trade for which the employee worked

Location ID – auto populated field indicating the Location ID for this work order

Hourly Rate – auto populated field indicating the worker's hourly pay rate based on the Labor Type selected.

Total Cost – auto populated field indicating the total labor cost applied for this transaction

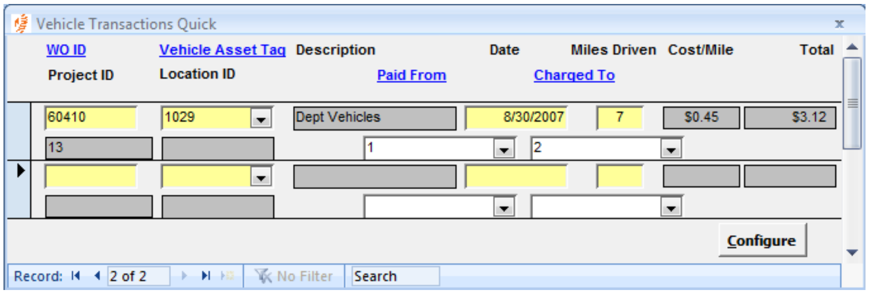
Paid From – system will **deduct** from this account the total cost for this transaction

Charged To – system will **add** to this account the total cost for this transaction

After you have entered all labor transactions for the selected employee, you can select another Employee ID from the list to begin entering transaction for that employee.

Vehicle Travel Transactions

Like the Labor Transactions Quick form, the same can be done with Vehicle Travel Transactions.



WO ID – enter the Work Order ID you will be adding vehicle travel to. Once populated, you can click on the WO ID link to take you directly to that work order on the Work Order Main form.

Vehicle Asset Tag – enter the Asset Tag Number for the vehicle that was used. After your selection has been made, you can click on the Vehicle Asset Tag link to take you directly to the selected vehicle on the Asset Main form.

*** Vehicles must be set up in the Asset Main Form and marked as a Vehicle and must be marked as In Service**

Description – indicates the Vehicle Name.

Date – enter or select the date for the vehicle travel transaction.

Miles Driven – enter the miles driven for this work orde.r

Cost/Mile – indicates the Cost/Mile based on the Vehicle selected. This value can be set in the Asset Main Form under the Vehicle Info tab.

Total – indicates the Total cost for the vehicle travel transaction.

Project ID – indicates the Project ID this work order is tied to.

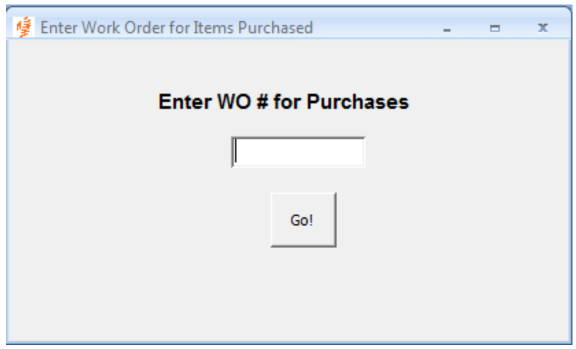
Location ID – indicates the Location ID for the location of the work order.

Paid From – system will **deduct** from this account the total cost for this transaction.

Charged To – system will **add** to this account the total cost for this transaction.

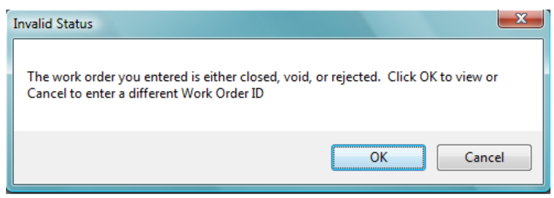
Purchase Transactions

The Purchase Transactions Form allows you to enter purchase transactions without having to do so through the Work Order Main form. This is a fast and efficient way to enter purchases when a person turns in several completed work orders at the end of the day.

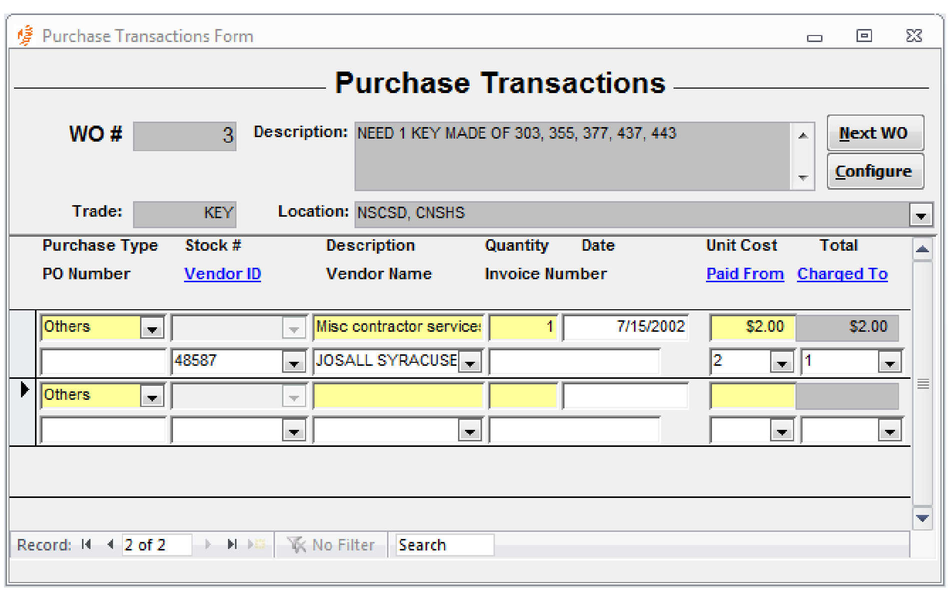


Enter the Work Order # for which you will be entering Transactions.

Entering a Work Order number that has a Closed, Void or Rejected status will yield the following screen:



Clicking Cancel will close the form and take you back to the Enter Work Order Number form. Clicking OK will open the Purchase Transactions form, but will not allow you to enter data.



WO ID – shows the work order number for which you are entering purchases.

Description – shows the description of the work order.

Next WO - Click this button to close the transactions form and opens the WO Search Form to enter transactions for another work order.

Configure - shows configuration options on the Purchase Transactions Form.

Trade – shows the trade for the work order.

Location – shows the location for the work order.

Purchase Type – Select the purchase type for this transaction.

- **Mechanical –** select this option if this is a mechanical item you usually carry in your warehouse.
- **Custodial –** select this option if this is a custodial item you usually carry in your warehouse.
- **Instructional -** select this option if this is an instructional item you usually carry in your warehouse.
- **Others –** select this option if this is an item that is not in my Inventory list. Perhaps a specialty item.
- **Service –** select this option if you purchased a service (i.e. outsource pest control work) to complete this work.

Stock # - if you selected Others or Service, you are not required to enter a Stock #.

Description – if you selected Others or Service, this becomes an 'open' text field so you can type in a description of what you purchased. Otherwise, it will auto populate once the Stock # is entered.

Quantity – enter this quantity if the item(s) you purchased. If you purchased multiple items for this one work order, you can summarize what you purchased by indicating Quantity as 1 and Unit Cost as the TOTAL amount spent.

Date – enter the date of the purchase transaction.

Unit Cost – enter the Unit Cost of the item(s) purchased.

Total – auto populated field calculating Quantity times Unit Cost.

PO Number – allows you to keep track of a PO Number used for this purchase.

Vendor ID – Enter or select the Vendor ID from the drop-down list. Entering the Vendor ID will populate the Vendor Name and vice versa.

Vendor Name - Enter or select the Vendor Name from the drop-down list. Entering the Vendor Name will populate the Vendor ID and vice versa.

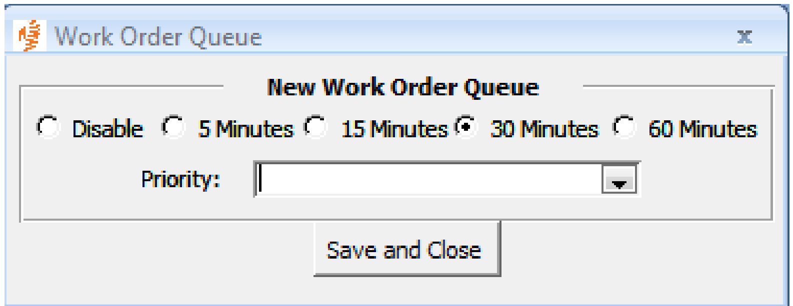
Invoice Number – enter the Invoice Number if available.

Paid From – system will **deduct** from this account the total cost for this transaction.

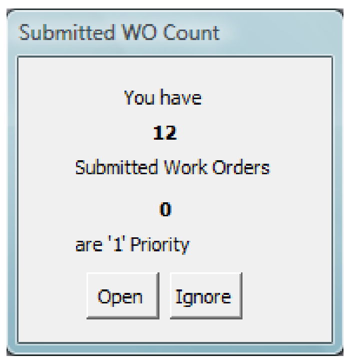
Charged To – system will **add** to this account the total cost for this transaction.

Work Order Queue Configuration

The purposed of this form is to prompt the user when newly submitted work orders are in the system. The prompt window occurs on the interval specified. The user can also determine if he/she would like to know the Priority of the Submitted work orders. The TeamWORKS Client/Server application must be open in order for the Prompt Window to pop up and is computer specific.



After the preferences have been selected, you can Save and Close the form. The settings will take place on the next login.



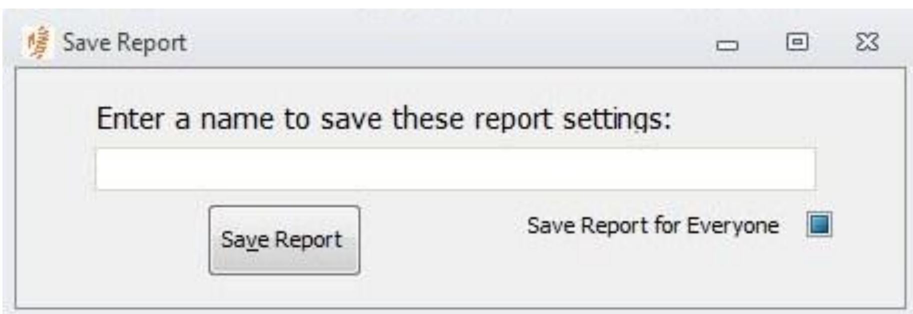
Click Open to go to the Work Order Form with the Submitted Work Orders Filtered out. Click Ignore to close the window and continue what you were doing.

Reports

The more you put in, the more you get out! This is certainly true when it comes to entering data for work orders. We recommend you put in as much data on the work order form as possible so that users can generate a multitude of reports based on several different criteria. The Reports themselves are 'hard coded' so they cannot be modified, however, with the easy to use report front, users can easily filter out the specific data they want to see on their reports.

As with all Report Fronts in the client-server suite, if you do not select an option from a list box, it will include all in the report. A Ctrl+click will allow you to multi-select values in a list box. The 'C' button over each list box will clear your selections. Any list box with an 'Include Sub Paths' checkbox will generate a report on the selected location, PLUS it's child paths.

Some reports will show a Save Report Button so that you can save your report. Once you click Save Report you will see the following:



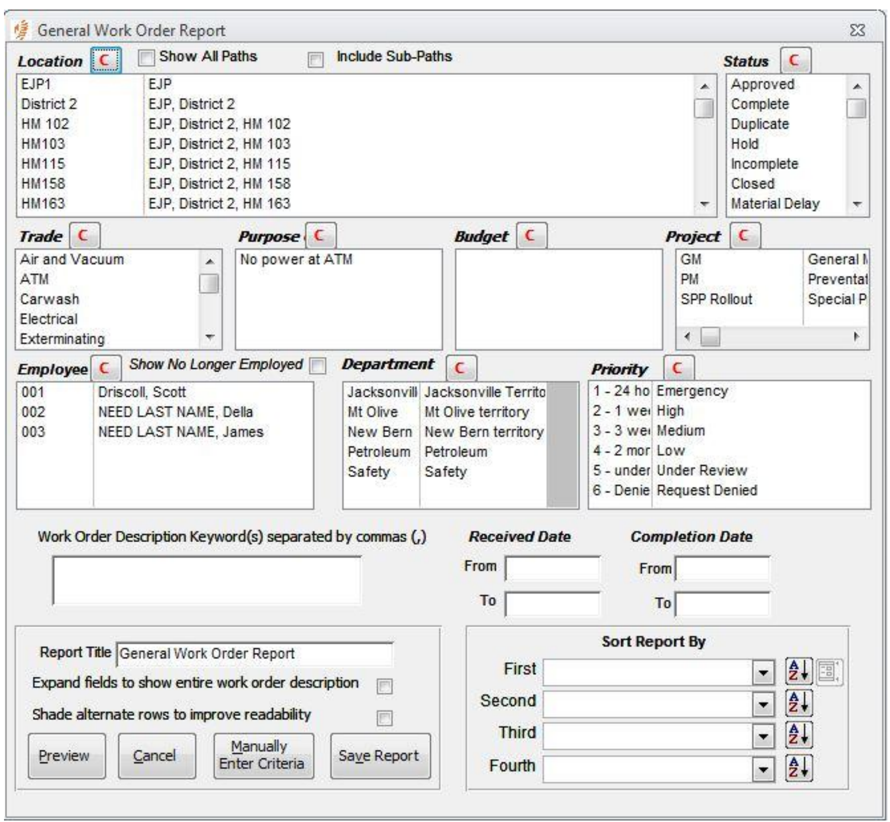
When you save it you can make it available to just you or everyone by checking the box.

General Report

95% of your work order reporting will come through this report. Any data entered on the work order form can be filtered out using this report front.

Work Order Description – this field will allow you to do a fuzzy search based on a key word in the description ***without*** using wildcards. Example: if you want to see all work order with the word 'restroom' or 'bathroom' in the description, then enter "restroom, bathroom" in the Work Order Description Keyword Search field. You can enter multiple words but are limited to 255 characters.

Expand Fields to Show Entire Work Order Description – by default, the report will show the description of the work order truncated to 25 characters. Checking this field will show the entire description field on the work order, thus, creating more pages.



General Work Order Report

DBCC
Facilities Services

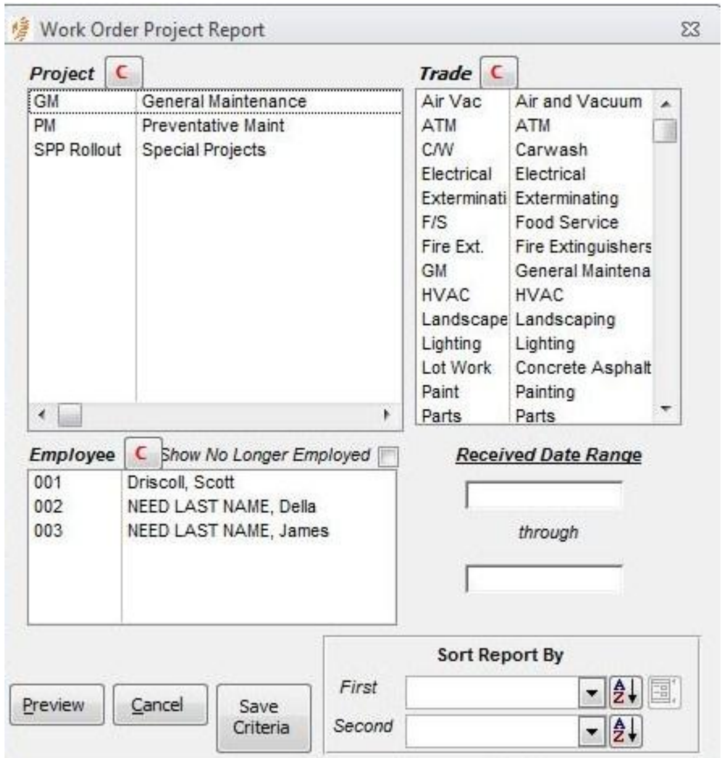
Dates Received: From To Dates Completed: From To

Location ID	WO #	Dept	Assn. To	Received	Completed	Status	Priority	Trade	Failure	Budget	Hours	Labor	Material	Travel	Total
Location					Room #		Description					Resolution			
ATCOUTEL	52025	EL	2687	3/1/2007	3/8/2007	C	1	EL	EM	10-117010200	14.5	$197.93	$0.00	$0.00	$197.93
DBCC, ATC Campus, Outside Electrical							Parking lot pole lights not working numbers 12,					Trouble shoot and repair			
ATCOUTEL	52668	EL	2687	3/22/2007	3/24/2007	C	R	EL		10-117010200	5	$102.35	$0.00	$0.00	$102.35
DBCC, ATC Campus, Outside Electrical							2 Bollard lights out at front entrance.					Changed out bad bulbs and ballast			
ATCOUTEL	52670	EL	2687	3/23/2007	3/24/2007	C	R	EL		10-117010200	5	$102.35	$0.00	$0.00	$102.35
DBCC, ATC Campus, Outside Electrical							Pole Lights out 12(2)-21(2)-13(1). Also North w								
ATCOUTEL	57046	EL	0854	6/22/2007	7/11/2007	C		EL		10-117010200	6	$66.36	$121.54	$0.00	$187.90
DBCC, ATC Campus, Outside Electrical							Multiple outside halogen lights attached to buildi					replaced bad bulbs			
ATCOUTEL	57343			6/28/2007		I		TD			9	$0.00	$0.00	$0.00	$0.00
DBCC, ATC Campus, Outside Electrical							Set stage,follow through Educaters graduation								
ATCOUTEL	61494	EL	2258-	9/21/2007	9/27/2007	C	R	EL		10-117010200	14	$181.09	$0.00	$0.00	$181.09
DBCC, ATC Campus, Outside Electrical							install electrical breakout panel for outside 220					Complete as Requested			

Total Work Orders	Grand Totals:	Hours	Labor	Material	Travel	Total
27		232	$2,984.97	$4,370.68	$0.00	$7,355.65

WO (Work Order) Project Report

This is a great report to run if you want to see all the work orders and costs tied toward any given project at any time.



Work Order Project Report

DBCC
Facilities Services

Project Name / Trade	Project ID / WO #	Location / WO Status	Assigned To	Received Date	Completion Date	Asset / WO Resolution	Purpose Code	Time Estimate / Total Hours	Cost Estimate / Total Cost
Deland Tornado - 2/02/20	10	DBCC, West Volusia Campus						0	$0.00
AC	50963	Complete	Hurd, William (Bi	2/5/2007	2/4/2007			8	$345.60
	CLEAN UP AFTER TORNADO DAMAGE								
	50965	Complete	Cope, James	2/2/2007	2/3/2007			3.75	$59.14
	---Overtime----Clean up Deland after storm					Completed as Requested			
	50914	Duplicate	Cope, James	2/3/2007				8	$189.20
	Clean up Deland Campus after storms.								
	50911	Complete	Holoman, Thoma	2/2/2007	2/2/2007		EM	8	$116.16
	Clean up and repair damage from tornados.					Completed			
	50911	Complete	Holoman, Thoma	2/2/2007	2/2/2007		EM	4	$69.44
	Clean up and repair damage from tornados.					Completed			
	50911	Complete	Holoman, Thoma	2/2/2007	2/2/2007		EM	8	$118.88
	Clean up and repair damage from tornados.					Completed			
	50911	Complete	Holoman, Thoma	2/2/2007	2/2/2007		EM	8	$126.16
	Clean up and repair damage from tornados.					Completed			
	55415	Complete	Acevedo, Edwin	5/19/2007	5/19/2007			8	$189.20
	----Overtime----Clean and PM York cooling tower.								
	50911	Complete	Holoman, Thoma	2/2/2007	2/2/2007		EM	8	$127.68
	Clean up and repair damage from tornados.					Completed			
	50963	Complete	Hurd, William (Bi	2/5/2007	2/4/2007			8	$345.60
	CLEAN UP AFTER TORNADO DAMAGE								

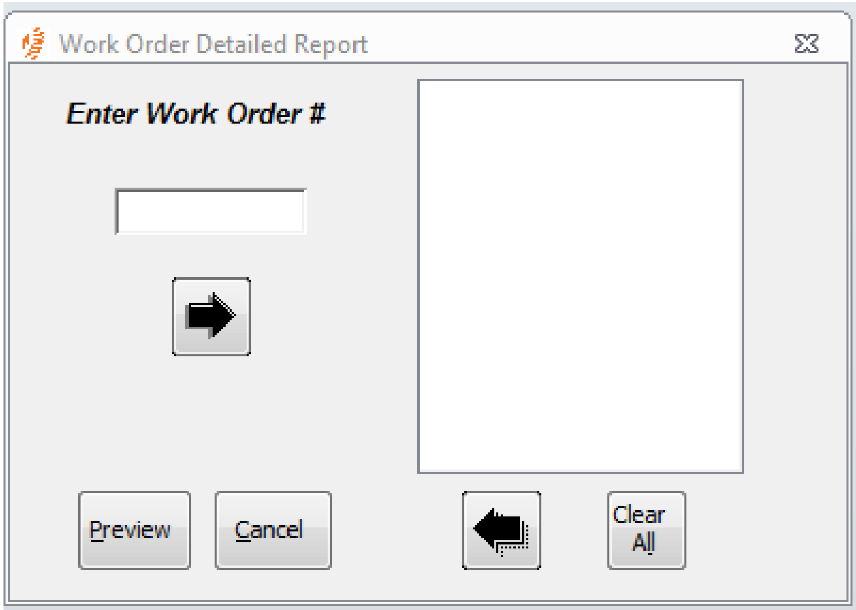
WO Description shown on the line below each work order.

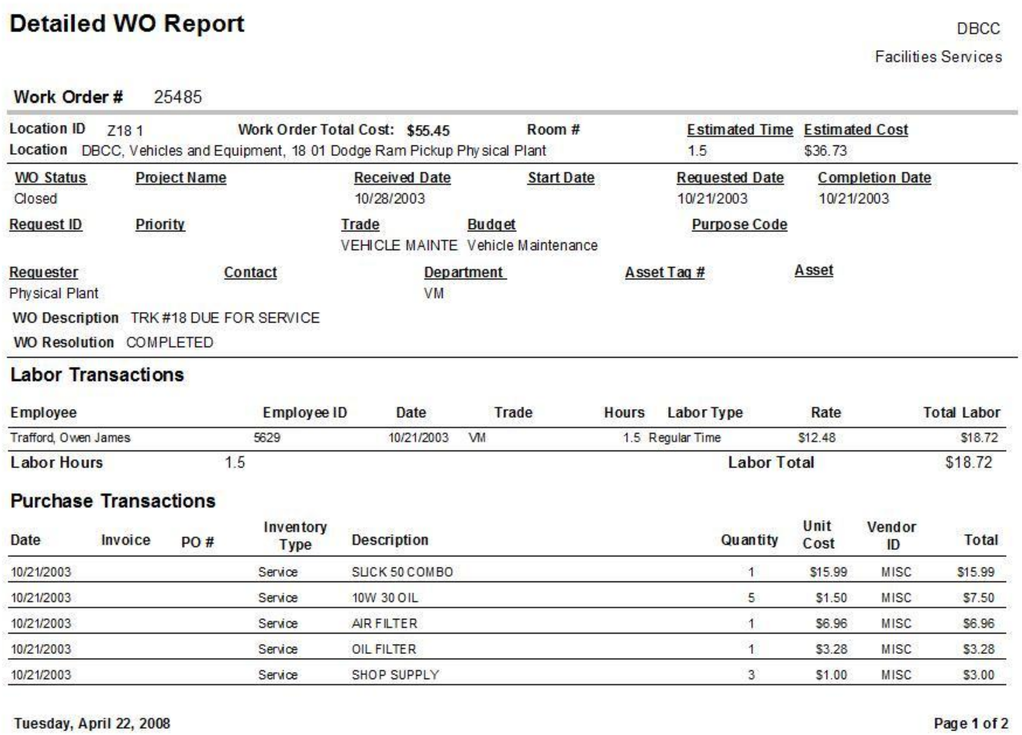
Page 1 of 22

Tuesday, April 22, 2008

Detailed Work Order Report

This report will show every detail including every transaction posted against this work order.





Detailed WO Report

DBCC
Facilities Services

Work Order # 25485

Location ID Z18 1 **Work Order Total Cost:** **$55.45** **Room #** **Estimated Time** 1.5 **Estimated Cost** $36.73

Location DBCC, Vehicles and Equipment, 18 01 Dodge Ram Pickup Physical Plant

WO Status	Project Name	Received Date	Start Date	Requested Date	Completion Date
Closed		10/28/2003		10/21/2003	10/21/2003

Request ID	Priority	Trade	Budget	Purpose Code
		VEHICLE MAINTE	Vehicle Maintenance	

Requester	Contact	Department	Asset Tag #	Asset
Physical Plant		VM		

WO Description TRK #18 DUE FOR SERVICE

WO Resolution COMPLETED

Labor Transactions

Employee	Employee ID	Date	Trade	Hours	Labor Type	Rate	Total Labor
Trafford, Owen James	5629	10/21/2003	VM	1.5	Regular Time	$12.48	$18.72

Labor Hours 1.5 **Labor Total** $18.72

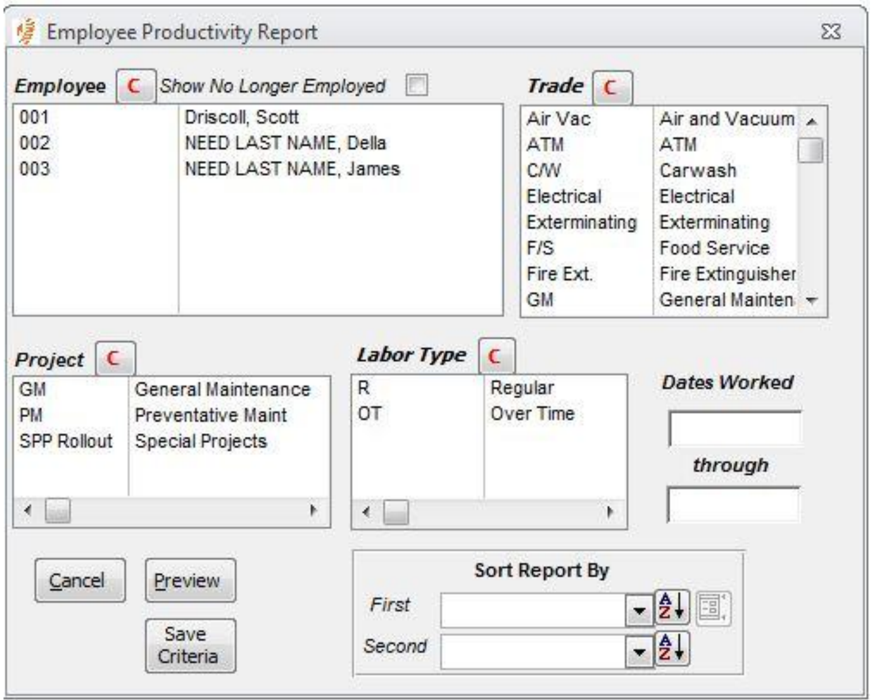
Purchase Transactions

Date	Invoice	PO #	Inventory Type	Description	Quantity	Unit Cost	Vendor ID	Total
10/21/2003			Service	SLICK 50 COMBO	1	$15.99	MISC	$15.99
10/21/2003			Service	10W 30 OIL	5	$1.50	MISC	$7.50
10/21/2003			Service	AIR FILTER	1	$6.96	MISC	$6.96
10/21/2003			Service	OIL FILTER	1	$3.28	MISC	$3.28
10/21/2003			Service	SHOP SUPPLY	3	$1.00	MISC	$3.00

Tuesday, April 22, 2008 — Page 1 of 2

Employee Productivity Report

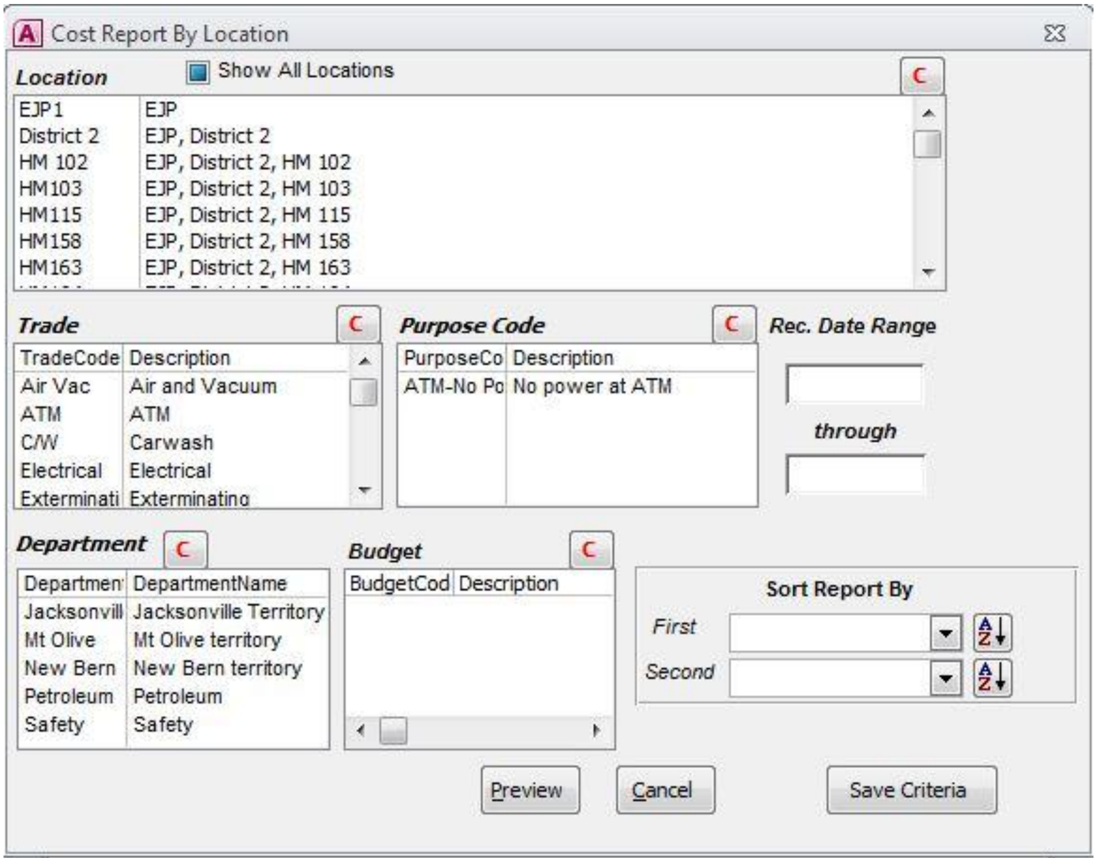
This report will show labor transactions (not Assigned To) for any employee, department or specific labor types specified in the report front.

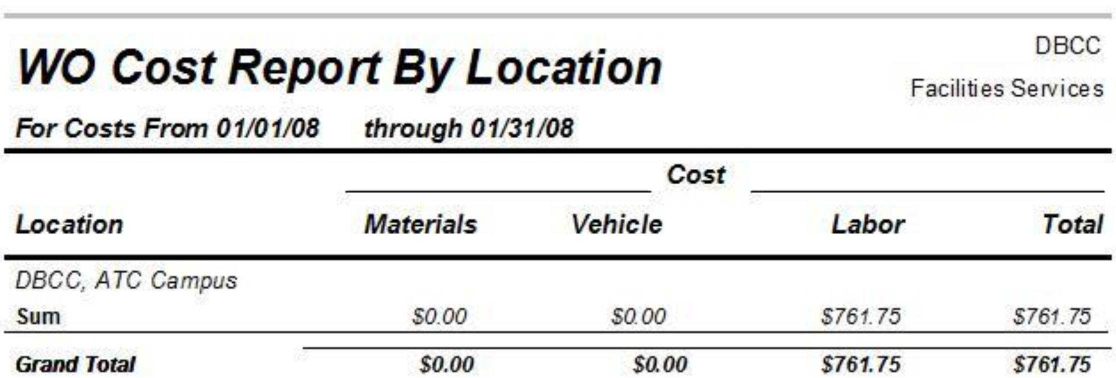


Employee Name			Employee ID				
Trade	WO#	Location ID	Date	Labor Type	Project	Hours	Total Labor
	WO Description						
Smith, Joe			131829				
MG	51244	WV	2/2/2007	R/T	Deland Tornado - 2/02/2007	9.00	$180.00
	HELP WITH CLEAN UP AFTER TORNADO						
	Total Records:		1		Subtotal	9.00	$180.00
Tucker, James			4926				
GR	51052	ZV	2/6/2007	R/T	Deland Tornado - 2/02/2007	3.00	$26.97
	GO TO BULLPEN AND REPLACE BATTERYIN TORO MULTI PRO 1200 FROM WEST CAMPUS CLEAN UP AND CHECK FOR DAMAGE						
GR	50928	WV	2/2/2007	R/T	Deland Tornado - 2/02/2007	4.00	$35.96
	GO TO WVC - REPLACE A HD HOSE ON #119 - HELP WITH TORNADO CLEAN UP						
	Total Records:		2		Subtotal	7.00	$62.93
Zevon, Warren			000979				
MI	51228	WV	2/5/2007	R/T	Deland Tornado - 2/02/2007	1.00	$10.00
	HELP WITH CLEAN UP AFTER TORNADO						
	Total Records:		1		Subtotal	1.00	$10.00
Grand Total	Total Records:		217			844.75	$15,545.40

Cost Report By Location

This Report will break down cost by Labor, materials and vehicle travel for any location for the specified period of time.





WO Cost Report By Location

DBCC
Facilities Services

For Costs From 01/01/08 through 01/31/08

Location	Materials	Vehicle	Labor	Total
DBCC, ATC Campus				
Sum	$0.00	$0.00	$761.75	$761.75
Grand Total	**$0.00**	**$0.00**	**$761.75**	**$761.75**

Priorities Report

Basic report showing priorities set up in the system.

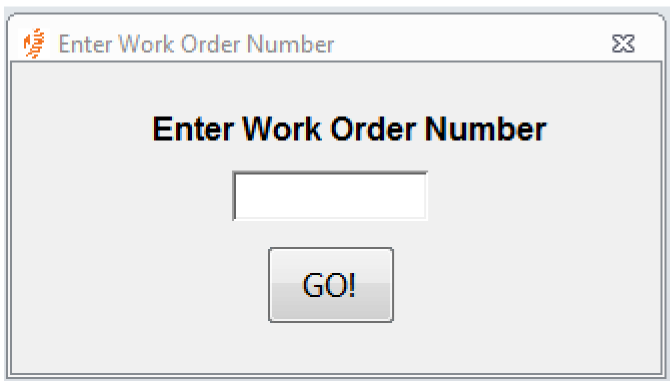
WO Priority Report

DBCC
Facilities Services

Priority ID	Description	Standard Completion Period
1	High	ASAP
R	Routine	

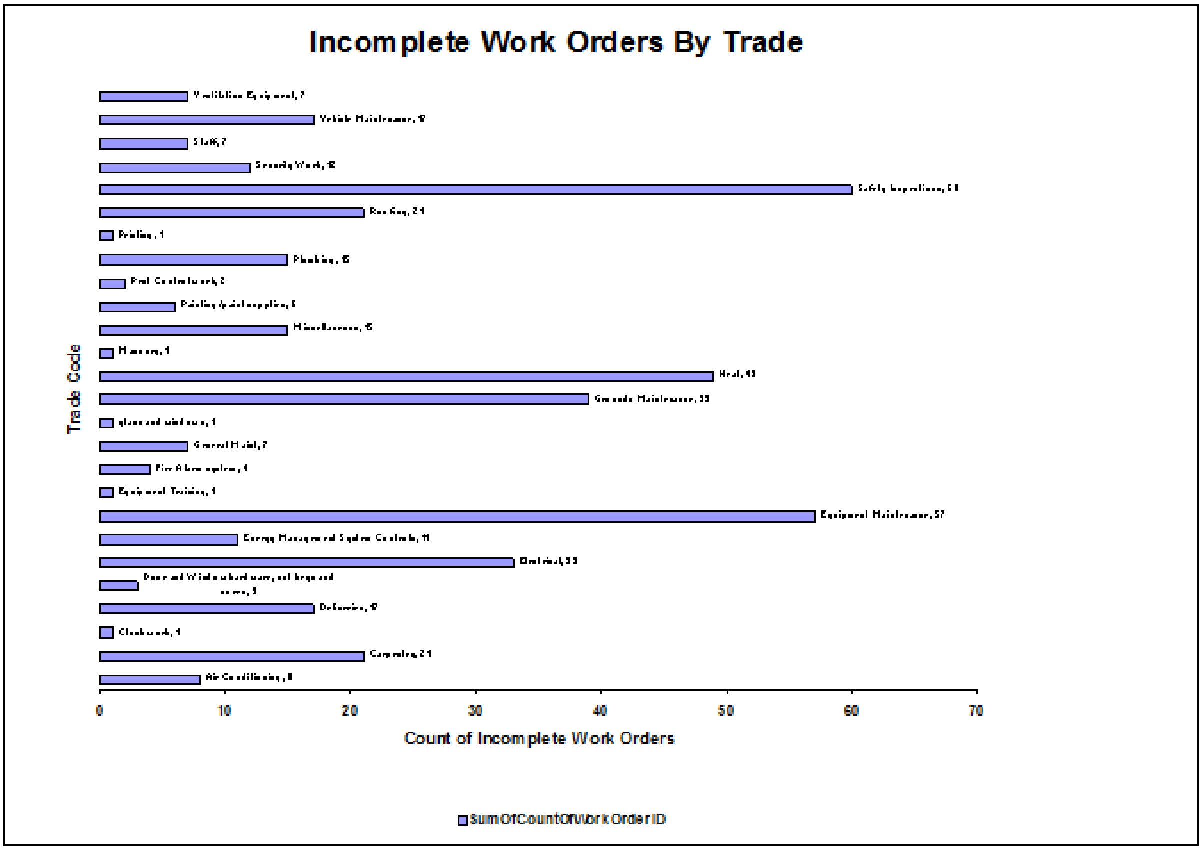
Work Order Reprint

This is a fast way to regenerate a work order without having to back into the Work Order main form.



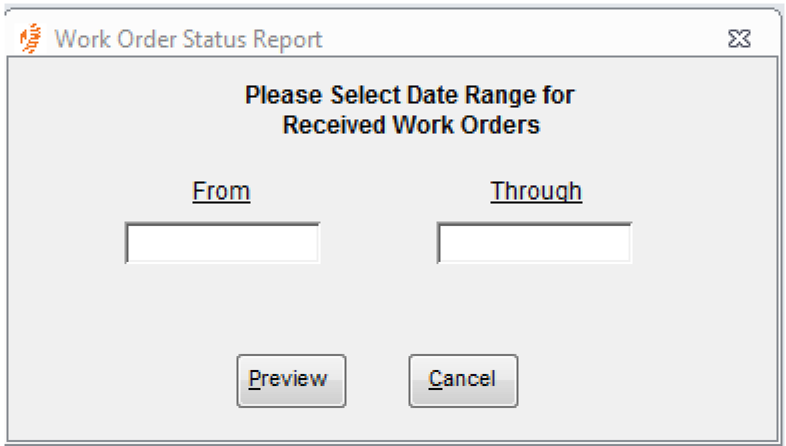
Incomplete By Trade (Chart)

This report will show incomplete work orders by trade code



Work Order Status Report

This report will show a count of the number of work orders in each status that were received during a specified date range.



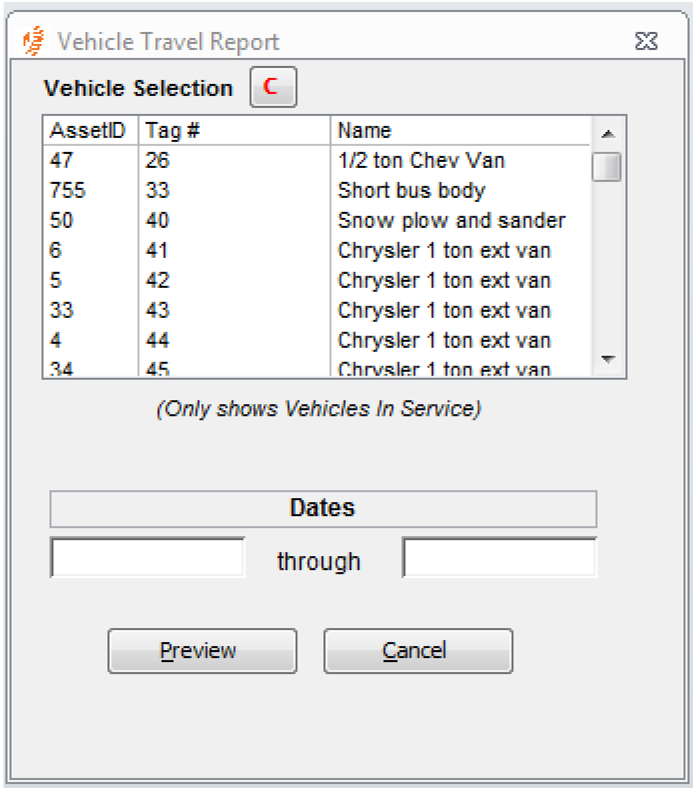
Work Order Status Report

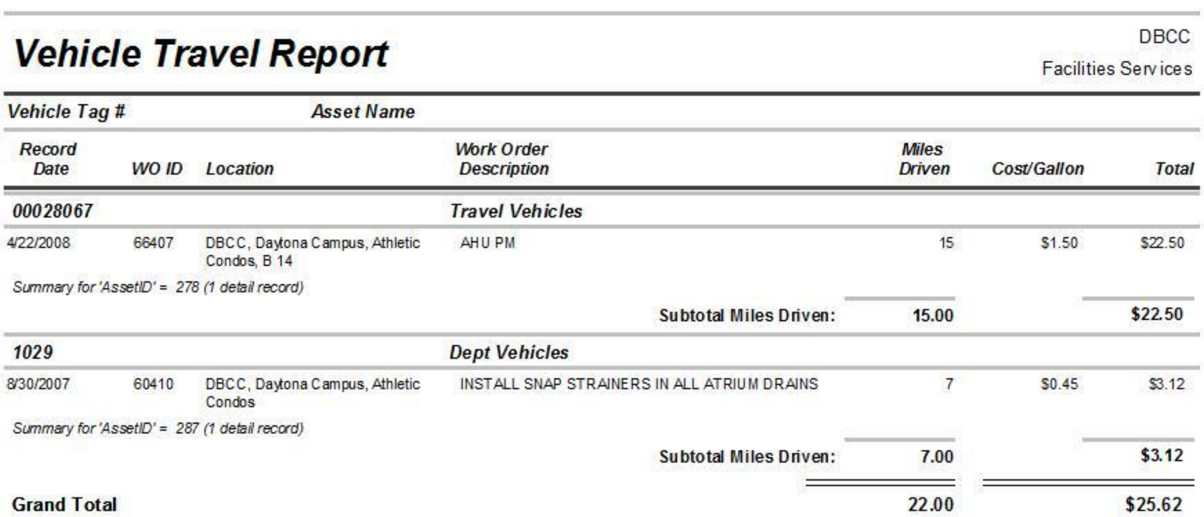
DBCC
Facilities Services

Status Description	Received Date	Number of Work Orders
Approved		
	2/14/2008	2
	2/18/2008	1
	2/26/2008	1
Summary for 'StatusDescription' = Approved (3 detail records)		
	Sum	**4**
Incomplete		
	2/14/2008	37
	2/18/2008	77
Summary for 'StatusDescription' = Incomplete (2 detail records)		
	Sum	**114**
Submitted		
	2/15/2008	2
	2/26/2008	2
Summary for 'StatusDescription' = Submitted (2 detail records)		
	Sum	**4**
Grand Total		**122**

Vehicle Travel Report

This report will show all vehicle travel transactions for any given vehicle during a specified timeframe.





Vehicle Travel Report

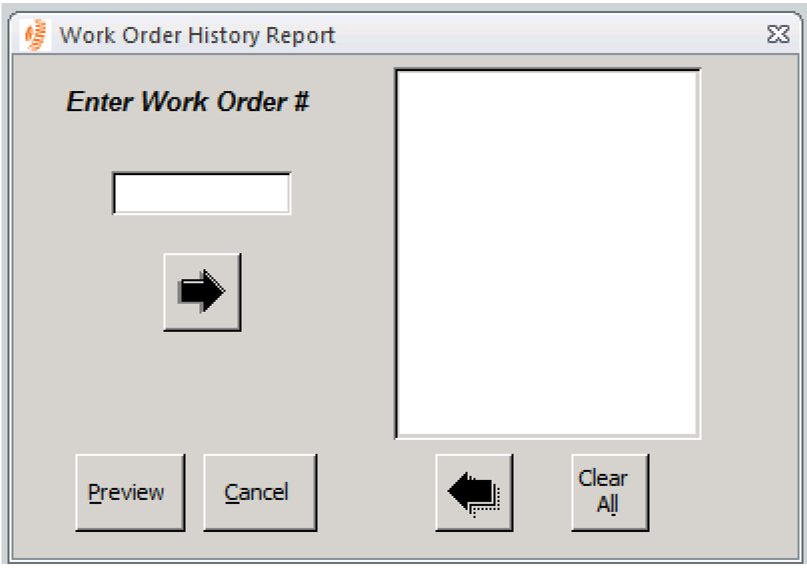
DBCC
Facilities Services

Vehicle Tag # — *Asset Name*

Record Date	WO ID	Location	Work Order Description	Miles Driven	Cost/Gallon	Total
00028067			***Travel Vehicles***			
4/22/2008	66407	DBCC, Daytona Campus, Athletic Condos, B 14	AHU PM	15	$1.50	$22.50
Summary for 'AssetID' = 278 (1 detail record)						
			Subtotal Miles Driven:	**15.00**		**$22.50**
1029			***Dept Vehicles***			
8/30/2007	60410	DBCC, Daytona Campus, Athletic Condos	INSTALL SNAP STRAINERS IN ALL ATRIUM DRAINS	7	$0.45	$3.12
Summary for 'AssetID' = 287 (1 detail record)						
			Subtotal Miles Driven:	**7.00**		**$3.12**
Grand Total				**22.00**		**$25.62**

Work Order History Report

This report will show any changes to the work order since its creation.



Work Order History Report

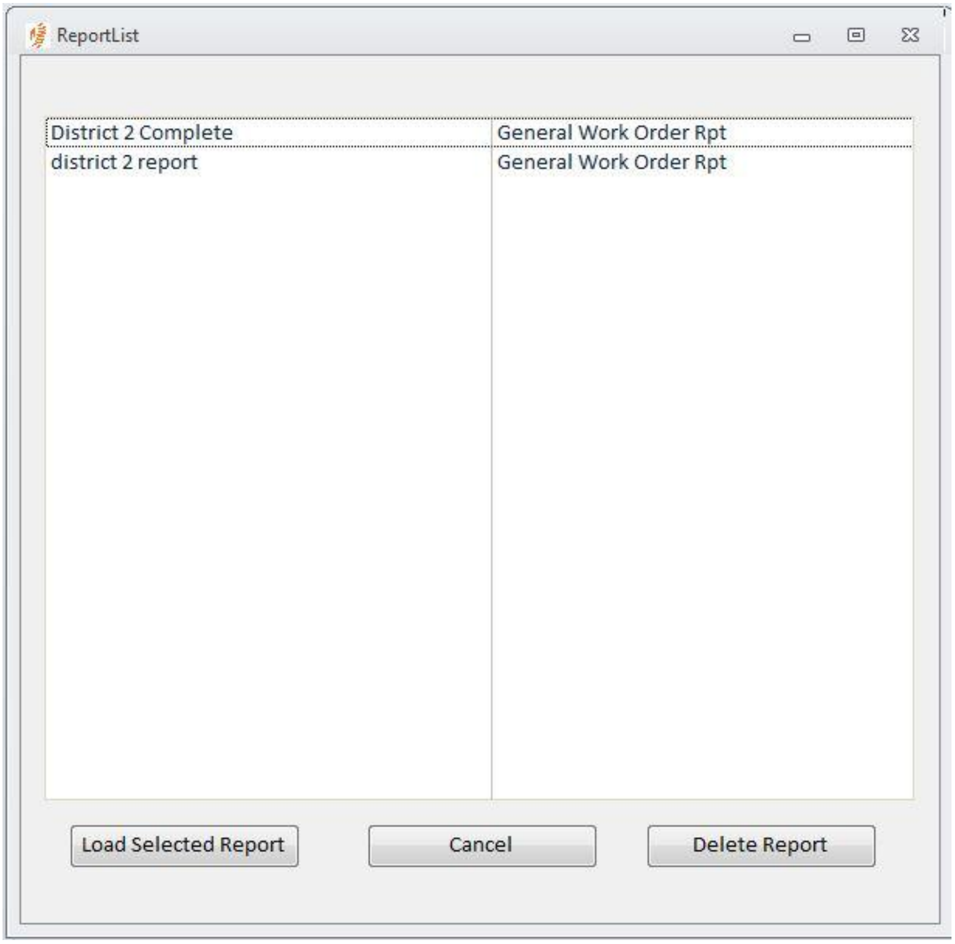
Teamworks Solutions, Inc
Facility Management Software

Field Changed	Old Value	New Value	Date Changed	Changed By User
Work Order ID:	**137022**			
ModifiedByUser		tnarde	7/27/2011 1:14:55 PM	tnarde
DateModified		Jul 27 2011 1:14PM	7/27/2011 1:14:55 PM	tnarde
WorkOrderStatus	S	A	7/27/2011 1:14:55 PM	tnarde
TradeCode		YC	7/27/2011 1:14:55 PM	tnarde
WorkOrderStatus	A	I	7/27/2011 1:15:01 PM	tnarde
AssignedTo			7/27/2011 10:50:51 AM	Team
Work Order ID:	**137023**			
ModifiedByUser		tnarde	7/27/2011 1:15:12 PM	tnarde
DateModified		Jul 27 2011 1:15PM	7/27/2011 1:15:12 PM	tnarde
WorkOrderStatus	S	A	7/27/2011 1:15:12 PM	tnarde
TradeCode		YC	7/27/2011 1:15:12 PM	tnarde
WorkOrderStatus	A	I	7/27/2011 1:15:32 PM	tnarde
AssignedTo			7/27/2011 10:51:05 AM	Team
Work Order ID:	**137024**			
ModifiedByUser		chicks	7/27/2011 10:51:32 AM	chicks
DateModified		Jul 27 2011 10:51AM	7/27/2011 10:51:32 AM	chicks
AssignedTo		4105	7/27/2011 10:51:32 AM	chicks
TradeCode		CA	7/27/2011 10:51:32 AM	chicks

Wednesday, August 31, 2011 **Page 1 of 2**

Saved Report Criteria

This allows you to access all your saved reports.



Just click your desired report and “Load” to open, “Cancel” to return to the Work Order Switchboard or “Delete” to permanently delete the selected report. (This cannot be undone!)

Customer Support

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