



5.0 User Guide

WEB Work Order Manager



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WEB Work Order Manager

TeamWORKS WEB Work Order Manager is designed to mimic the client version and effectively manages and tracks the work order process from virtually anywhere. By using WEB Work Order Manager, users can access their work orders from anywhere and can keep track of work orders tied to specific categories like:

- Assigned To Employee
- Trades
- Projects
- Specific Locations
- Departments
- Vandalism
- Priority
- Budgets
- 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 to complete a work order request.

NOTE: Pop up blockers should be turned off or exceptions to this site should be made if not functionality will be lost. Also some screen shots may vary depending upon the browser you use.

Login to TeamWORKS WEB

Please Log In

User Name:

Password:

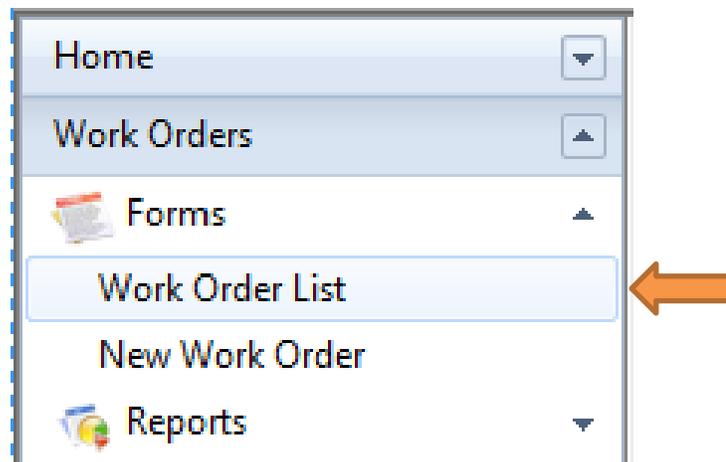


Forms

Work Order List

The Work Order List provides the user with a complete list of all work orders. You can set default view for each user to specify the work orders contained in the initial view.

From the main menu Click on **Work Orders** and under **Forms** Select **Work Order List**.



Work Order List screen

Work Order List											
New Work Order		New Search		My Search List		Save Search		Clear Search		Click the column title to sort.	
Refresh											
W/O ID	Location	Rec'd Date	Comp. Date	Status	Priority	Description	Resolution				
146905	Forsyth County S.S., Big Creek ES	08/30/2011		I		Roof is leaking					
146902	Forsyth County S.S., Sawnee ES, Building 1	06/09/2011	06/09/2011	I	3	check and adjusted 1200 halls trap primers	started				
146899	Forsyth County S.S., South Forsyth HS	06/09/2011		I	2	Need three keys for room 1501 because we now have 2 additional part time teachers need to gain entry...					
146898	Forsyth County S.S., Silver City ES	06/09/2011		i	3	Nancy reported this roof leak on June 1, 2011. I visited Silver City yesterday afternoon and it app...					
146897	Forsyth County S.S., North Forsyth HS	06/09/2011		I	4	C & A Room 670--there are multiple locations in this locker room where studs are protruding from t...					
146895	Forsyth County S.S., North Forsyth HS	06/09/2011		I	4	Room 670/680--repair/replace missing base molding.					
146894	Forsyth County S.S., Vickery Creek MS	06/09/2011		I	4	Rms need to change the ballasts #240, 247, 248, 249, 250, 251, 252, 253, 254, 255, 256, 257, 258, 259, 260, 261, 262, 263, 264, 265, 266, 267, 268, 269, 270, 271, 272, 273, 274, 275, 276, 277, 278, 279, 280, 281, 282, 283, 284, 285, 286, 287, 288, 289, 290, 291, 292, 293, 294, 295, 296, 297, 298, 299, 300, 301, 302, 303, 304, 305, 306, 307, 308, 309, 310, 311, 312, 313, 314, 315, 316, 317, 318, 319, 320, 321, 322, 323, 324, 325, 326, 327, 328, 329, 330, 331, 332, 333, 334, 335, 336, 337, 338, 339, 340, 341, 342, 343, 344, 345, 346, 347, 348, 349, 350, 351, 352, 353, 354, 355, 356, 357, 358, 359, 360, 361, 362, 363, 364, 365, 366, 367, 368, 369, 370, 371, 372, 373, 374, 375, 376, 377, 378, 379, 380, 381, 382, 383, 384, 385, 386, 387, 388, 389, 390, 391, 392, 393, 394, 395, 396, 397, 398, 399, 400, 401, 402, 403, 404, 405, 406, 407, 408, 409, 410, 411, 412, 413, 414, 415, 416, 417, 418, 419, 420, 421, 422, 423, 424, 425, 426, 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1188, 1189, 1190, 1191, 1192, 1193, 1194, 1195, 1196, 1197, 1198, 1199, 1200, 1201, 1202, 1203, 1204, 1205, 1206, 1207, 1208, 1209, 1210, 1211, 1212, 1213, 1214, 1215, 1216, 1217, 1218, 1219, 1220, 1221, 1222, 1223, 1224, 1225, 1226, 1227, 1228, 1229, 1230, 1231, 1232, 1233, 1234, 1235, 1236, 1237, 1238, 1239, 1240, 1241, 1242, 1243, 1244, 1245, 1246, 1247, 1248, 1249, 1250, 1251, 1252, 1253, 1254, 1255, 1256, 1257, 1258, 1259, 1260, 1261, 1262, 1263, 1264, 1265, 1266, 1267, 1268, 1269, 1270, 1271, 1272, 1273, 1274, 1275, 1276, 1277, 1278, 1279, 1280, 1281, 1282, 1283, 1284, 1285, 1286, 1287, 1288, 1289, 1290, 1291, 1292, 1293, 1294, 1295, 1296, 1297, 1298, 1299, 1300, 1301, 1302, 1303, 1304, 1305, 1306, 1307, 1308, 1309, 1310, 1311, 1312, 1313, 1314, 1315, 1316, 1317, 1318, 1319, 1320, 1321, 1322, 1323, 1324, 1325, 1326, 1327, 1328, 1329, 1330, 1331, 1332, 1333, 1334, 1335, 1336, 1337, 1338, 1339, 1340, 1341, 1342, 1343, 1344, 1345, 1346, 1347, 1348, 1349, 1350, 1351, 1352, 1353, 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1520, 1521, 1522, 1523, 1524, 1525, 1526, 1527, 1528, 1529, 1530, 1531, 1532, 1533, 1534, 1535, 1536, 1537, 1538, 1539, 1540, 1541, 1542, 1543, 1544, 1545, 1546, 1547, 1548, 1549, 1550, 1551, 1552, 1553, 1554, 1555, 1556, 1557, 1558, 1559, 1560, 1561, 1562, 1563, 1564, 1565, 1566, 1567, 1568, 1569, 1570, 1571, 1572, 1573, 1574, 1575, 1576, 1577, 1578, 1579, 1580, 1581, 1582, 1583, 1584, 1585, 1586, 1587, 1588, 1589, 1590, 1591, 1592, 1593, 1594, 1595, 1596, 1597, 1598, 1599, 1600, 1601, 1602, 1603, 1604, 1605, 1606, 1607, 1608, 1609, 1610, 1611, 1612, 1613, 1614, 1615, 1616, 1617, 1618, 1619, 1620, 1621, 1622, 1623, 1624, 1625, 1626, 1627, 1628, 1629, 1630, 1631, 1632, 1633, 1634, 1635, 1636, 1637, 1638, 1639, 1640, 1641, 1642, 1643, 1644, 1645, 1646, 1647, 1648, 1649, 1650, 1651, 1652, 1653, 1654, 1655, 1656, 1657, 1658, 1659, 1660, 1661, 1662, 1663, 1664, 1665, 1666, 1667, 1668, 1669, 1670, 1671, 1672, 1673, 1674, 1675, 1676, 1677, 1678, 1679, 1680, 1681, 1682, 1683, 1684, 1685, 1686, 1687, 1688, 1689, 1690, 1691, 1692, 1693, 1694, 1695, 1696, 1697, 1698, 1699, 1700, 1701, 1702, 1703, 1704, 1705, 1706, 1707, 1708, 1709, 1710, 1711, 1712, 1713, 1714, 1715, 1716, 1717, 1718, 1719, 1720, 1721, 1722, 1723, 1724, 1725, 1726, 1727, 1728, 1729, 1730, 1731, 1732, 1733, 1734, 1735, 1736, 1737, 1738, 1739, 1740, 1741, 1742, 1743, 1744, 1745, 1746, 1747, 1748, 1749, 1750, 1751, 1752, 1753, 1754, 1755, 1756, 1757, 1758, 1759, 1760, 1761, 1762, 1763, 1764, 1765, 1766, 1767, 1768, 1769, 1770, 1771, 1772, 1773, 1774, 1775, 1776, 1777, 1778, 1779, 1780, 1781, 1782, 1783, 1784, 1785, 1786, 1787, 1788, 1789, 1790, 1791, 1792, 1793, 1794, 1795, 1796, 1797, 1798, 1799, 1800, 1801, 1802, 1803, 1804, 1805, 1806, 1807, 1808, 1809, 1810, 1811, 1812, 1813, 1814, 1815, 1816, 1817, 1818, 1819, 1820, 1821, 1822, 1823, 1824, 1825, 1826, 1827, 1828, 1829, 1830, 1831, 1832, 1833, 1834, 1835, 1836, 1837, 1838, 1839, 1840, 1841, 1842, 1843, 1844, 1845, 1846, 1847, 1848, 1849, 1850, 1851, 1852, 1853, 1854, 1855, 1856, 1857, 1858, 1859, 1860, 1861, 1862, 1863, 1864, 1865, 1866, 1867, 1868, 1869, 1870, 1871, 1872, 1873, 1874, 1875, 1876, 1877, 1878, 1879, 1880, 1881, 1882, 1883, 1884, 1885, 1886, 1887, 1888, 1889, 1890, 1891, 1892, 1893, 1894, 1895, 1896, 1897, 1898, 1899, 1900, 1901, 1902, 1903, 1904, 1905, 1906, 1907, 1908, 1909, 1910, 1911, 1912, 1913, 1914, 1915, 1916, 1917, 1918, 1919, 1920, 1921, 1922, 1923, 1924, 1925, 1926, 1927, 1928, 1929, 1930, 1931, 1932, 1933, 1934, 1935, 1936, 1937, 1938, 1939, 1940, 1941, 1942, 1943, 1944, 1945, 1946, 1947, 1948, 1949, 1950, 1951, 1952, 1953, 1954, 1955, 1956, 1957, 1958, 1959, 1960, 1961, 1962, 1963, 1964, 1965, 1966, 1967, 1968, 1969, 1970, 1971, 1972, 1973, 1974, 1975, 1976, 1977, 1978, 1979, 1980, 1981, 1982, 1983, 1984, 1985, 1986, 1987, 1988, 1989, 1990, 1991, 1992, 1993, 1994, 1995, 1996, 1997, 1998, 1999, 2000, 2001, 2002, 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024, 2025, 2026, 2027, 2028, 2029, 2030, 2031, 2032, 2033, 2034, 2035, 2036, 2037, 2038, 2039, 2040, 2041, 2042, 2043, 2044, 2045, 2046, 2047, 2048, 2049, 2050, 2051, 2052, 2053, 2054, 2055, 2056, 2057, 2058, 2059, 2060, 2061, 2062, 2063, 2064, 2065, 2066, 2067, 2068, 2069, 2070, 2071, 2072, 2073, 2074, 2075, 2076, 2077, 2078, 2079, 2080, 2081, 2082, 2083, 2084, 2085, 2086, 2087, 2088, 2089, 2090, 2091, 2092, 2093, 2094, 2095, 2096, 2097, 2098, 2099, 2100, 2101, 2102, 2103, 2104, 2105, 2106, 2107, 2108, 2109, 2110, 2111, 2112, 2113, 2114, 2115, 2116, 2117, 2118, 2119, 2120, 2121, 2122, 2123, 2124, 2125, 2126, 2127, 2128, 2129, 2130, 2131, 2132, 2133, 2134, 2135, 2136, 2137, 2138, 2139, 2140, 2141, 2142, 2143, 2144, 2145, 2146, 2147, 2148, 2149, 2150, 2151, 2152, 2153, 2154, 2155, 2156, 2157, 2158, 2159, 2160, 2161, 2162, 2163, 2164, 2165, 2166, 2167, 2168, 2169, 2170, 2171, 2172, 2173, 2174, 2175, 2176, 2177, 2178, 2179, 2180, 2181, 2182, 2183, 2184, 2185, 2186, 2187, 2188, 2189, 2190, 2191, 2192, 2193, 2194, 2195, 2196, 2197, 2198, 2199, 2200, 2201, 2202, 2203, 2204, 2205, 2206, 2207, 2208, 2209, 2210, 2211, 2212, 2213, 2214, 2215, 2216, 2217, 2218, 2219, 2220, 2221, 2222, 2223, 2224, 2225, 2226, 2227, 2228, 2229, 2230, 2231, 2232, 2233, 2234, 2235, 2236, 2237, 2238, 2239, 2240, 2241, 2242, 2243, 2244, 2245, 2246, 2247, 2248					

Resolution – indicates what was done to complete the Work Order displayed.

Bottom tool bar – indicated page number and number of records.



Open or Export page into Microsoft Excel®

The search results will yield the following screen:

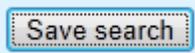
Work Order List

Click the column title to sort.

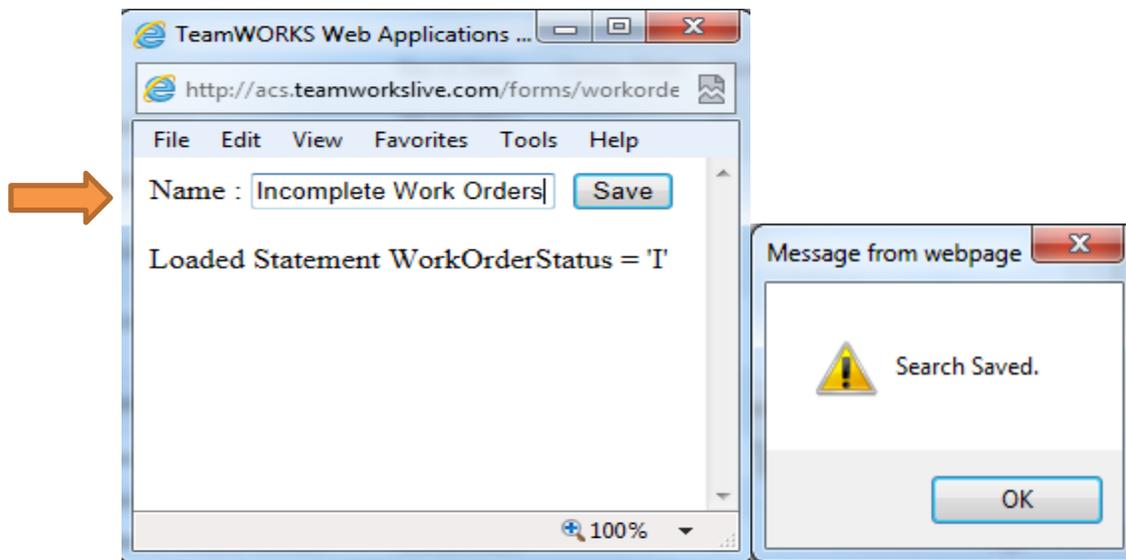
W/O ID	Location	Rec'd Date	Comp. Date	Status	Priority	Description	Resolution
146431	Forsyth County S.S., Shiloh Point ES	06/07/2011		I	4	The 5400 # 02990 right cleaning brush will not turn.	
146427	Forsyth County S.S., Cumming ES	06/07/2011		I	4	rider scrubber machine 7100 asset 02612 suction motor has stopped working please send someone as so...	
145498	Forsyth County S.S., Liberty MS	05/24/2011	05/26/2011	L	3	High Speed Buffer #02875 will not move after you turn the buffing motor on (moves find when it is c...	
145446	Forsyth County S.S., North Forsyth MS	05/23/2011	05/26/2011	L	4	Please, if I could get the Athen Ganitorial Technician check the Rider Tag #15123 if the machine nee...	
145120	Forsyth County S.S., Forsyth Central HS	05/19/2011	05/26/2011	L	3	East Campus GTX machine asset #15114 needs new rear squeege, cannot be turned over again.	
145077	Forsyth County S.S., Forsyth Central HS	05/19/2011	05/26/2011	L	3	West Campus room 1214 asset #02618 drive motor does not work, need repair before	

Page: of 17 Go Page size: Change Item 1 to 25 of 405



To save, Click  at the top of the Work Order List. The saved search will load each time you login.

It will then prompt you to another screen where the user can type the name in which they wish to save the search under. Click Save and you will receive a message confirmation. Click OK to close.



My Search List Tab

Click here to view a list of your saved searches.

Click the **My Search List** tab at the top of the Work Order List page



The following screen will appear with a list of the user's saved searches:

Set your default Search :

Load	ID	UserID	wherestatement	Name	default	
Load	4	636	WorkOrderStat = 'I'	Incomplete	yes	

Load –click this button to launch the work order list page with your saved results.

ID – system generated identification for report.

User ID – system generated identification for individual logged in to TeamWORKS.

Wherestatement – SQL statement used to retrieve data.

Name – displays the name of your saved search

Default – set to “yes” for the default view that will load when initially viewing the work order list page.



-Click here to delete the search

*NOTE: Only **ONE** Default search Criteria can be saved at a time. The Default Search can have one search that has multiple criteria*

Set your default Search : Save

Load	ID	Incomplete	wherestatement	Name	default	
Load	4		WorkOrderStat = 'I'	Incomplete	yes	

Clear Search

Clears the users search parameters.

Work Order List

New Work Order

Click the New Work Order Tab at the top of the Work Order List page.

Work Order List

New Work Order
New Search
My Search List
Save Search
Clear Search

Click the column title to sort.

WEB Work Order Form

WO Number	Request ID	Project ID	Date Received	Completion Deadline
146883		GM	6/9/2011	6/14/2011
			Date Started	Completion Date
Status	Location Code	Location	Room Number	
Incomplete	38	Forsyth County S.S., Piney Grove MS		
Requestor	Contact	Contact Email	Asset Tag # / Asset Name	Mileage/Hours
Debbie Kelley				
Department	Employee Number	Employee Name	Trade Code	
Maint	22467	Carlisle, Bryan	H	
Work Order Description			Work Order Resolution	
Rm 1263 Floor Schedule June 13 and 14 from 7am-5pm			Emailed Bryan 06-09-11	
Purpose Code	Priority Code	Budget Code	<input type="button" value="Print"/> <input type="button" value="Transactions"/> <input type="button" value="Adv.Print"/> <input type="button" value="History"/> <input type="button" value="R/R"/>	
RM	2		<input type="button" value="Email WO"/> <input type="button" value="WO Search"/> <input type="button" value="Complete"/> <input type="button" value="Config"/> <input type="button" value="Docs"/>	
Estimated Hours	Created By	Modified Last By		
	Debbie Kelley	aodom		
Estimated Cost	Date Created	Date Modified	<input type="checkbox"/> Planned?	
	6/9/2011 9:41:0	6/9/2011 2:19:4		
<input type="button" value="New"/> <input type="button" value="Update"/> <input type="button" value="Reset"/>				
<input type="button" value="Update/Close"/>				
<input type="button" value="Work Order Search"/> <input type="button" value="Work Order List"/>				

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 cursor in the appropriate field, you can go to the Records Menu and 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, reference an Event Schedule ID, or a vendor work order number.

*** 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 2 different ways:

- Type in the date (i.e. 6/6/05)
- Click on the Calendar icon  and select date.

Date 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 throughout 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 will be completed at a later date (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 and reviewed. 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 data entry.
- **Material Delay** – indicates waiting on parts, materials or service to complete the requested work.
- **Rejected** – indicates the work requested will not be approved.
- **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 user 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).

* **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 is filtered by the location selected for this work order. Only assets from the Asset Main Form tied to this location will show.

** 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).

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

Work Order 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.

Date Created – Indicates the original date the work order was created

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 Last 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.

Date Modified – indicates the **LAST** date changes were made to this work order.

Print – 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.

Transactions - allows you to track work orders costs for:

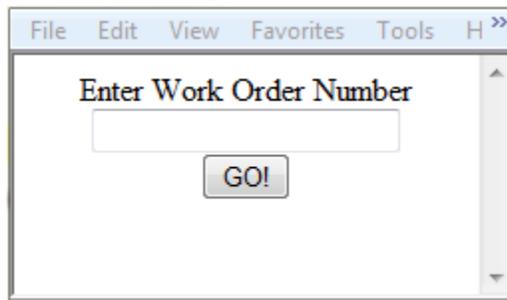
- Labor
- Inventory Issued for work order
- Purchases made for the work order from outside vendors
- Vehicle Travel
- Transactions Totals

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

R/R - Duplicate Work Order – click this button 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 same ‘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.

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

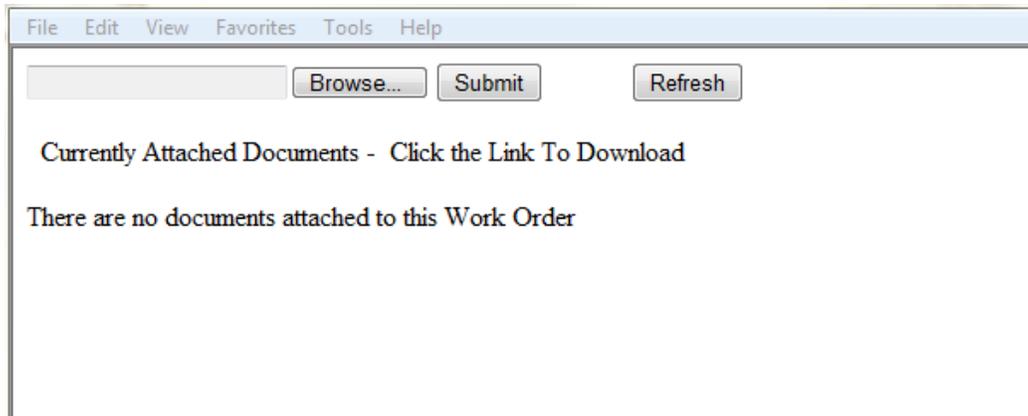
Config – click this button to go the configuration options for the work order main form. The Config form allows users to specify default values, set tab stops and more.

Name	Default	Tabstop	Required	Disabled	System-Required	Save
Request ID		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1
Project ID		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	2
Received Date		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3
Date Started		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4
Calendar Start Date		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5
Completion Deadline		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5
Completion Date		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6
Button Show Submitted Work Orders		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7
Calendar Requested Completion Date		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7
Status	A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	8
Location Code		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	9
Calendar Completion Date		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	9
Location		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10
Requester		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12
Contact		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13
Asset Tag Number		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15
Asset Name		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	15

- **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.

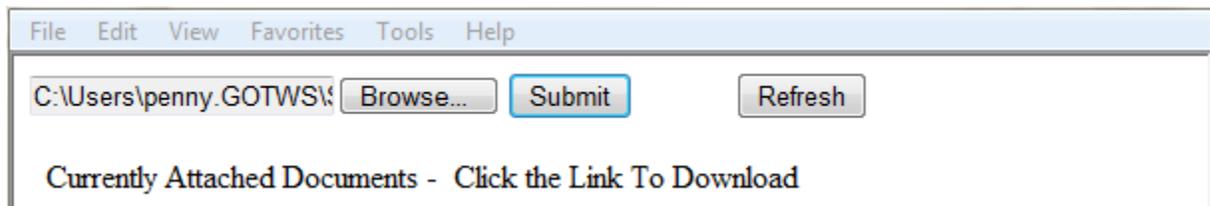
Docs – click this button to attach a document to the work order. This document will be viewable to other users including Remote Request as long as they have the proper application to open the file.

NOTE: Set up is required by your TeamWORKS System Administrator.

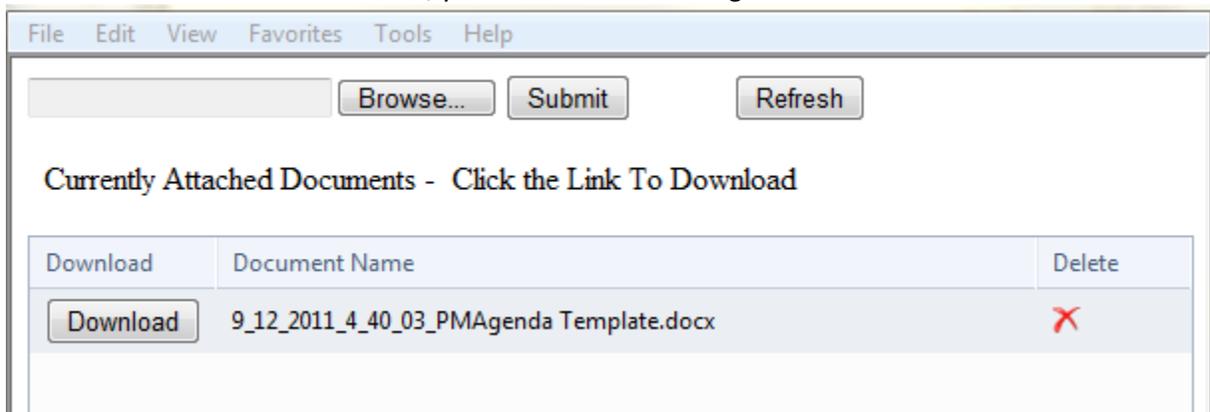


To attach a document to a work order:

1. Browse to the file you want to attach and double click the file
2. File Path now shows in the window as such:



3. Attached document now shows in the Currently Attached Documents Window
4. Click Submit to attach document
5. Once document is attached, you will see the following:

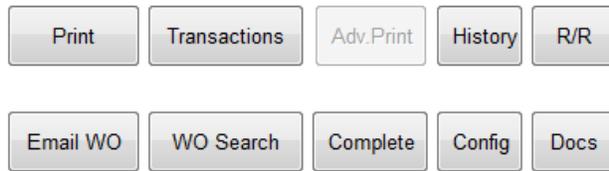


6. To Delete an attached document, select it from the Currently Attached Documents window and click the delete icon .

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.

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



Planned?

This will prompt the below Work Order Transaction form

Transactions for WO #: Close Form

Labor	Inventory Issued	Purchases	Vehicle Travel	Transactions Totals
Employee ID	Hours Worked	Work Date	Hourly Rate	Total
Employee Name	Trade	Labor Type	Paid From	Charged To

No records to display.

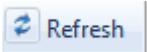
+ Add new record
Refresh

Config

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

Close Form – this button closes the Transaction Form and takes you back to the work order you were working with

Add new record –  - click this icon to create a new transaction

Refresh icon  - click this icon to refresh the page

Labor

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

Transactions for WO #: Close Form

Labor	Inventory Issued	Purchases	Vehicle Travel	Transactions Totals
Employee ID Employee Name	Hours Worked Trade	Work Date Labor Type	Hourly Rate Paid From	Total Charged To
<input type="text" value="0001"/>	<input type="text" value="1.00"/>	<input type="text" value="9/9/2011"/>	<input type="text" value="\$15.00"/>	<input type="text" value="\$15.00"/>
<input type="text" value="Drouillard, Craig"/>	<input type="text" value="H"/>	<input type="text" value="R"/>	<input type="text" value="1"/>	<input type="text" value="0-410.0-01"/>
<input type="button" value="Insert"/> <input type="button" value="Cancel"/>				
No records to display.				
<input type="button" value="Add new record"/>				<input type="button" value="Refresh"/>
<input type="button" value="Config"/>				

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

Close Form – Click this button to close the Work Order Transaction Form

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

Insert – this button will attach the transaction information to the Work Order

Cancel – this button will cancel the transaction

Add New Record – Click here to add another 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.

Transactions for WO #: 148882 Close Form

Labor	Inventory Issued	Purchases	Vehicle Travel	Transactions Totals
Inventory Type	Stock - Inventory Loc.	Description	Qty ---- Date Unit of Issue	Unit Price Paid From Total Charged To
Mechanical	C121	BOOTH #2020 RR BRINK LOCKING SYSTEM W/ POWER SUPPLY #3631	0.00 9/9/2011 Units	0.00 0-410.0-01 0.00
<input type="button" value="Insert"/> <input type="button" value="Cancel"/>				
No records to display.				
<input type="button" value="Add new record"/>				<input type="button" value="Refresh"/>
<input type="button" value="Config"/>				

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.

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

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

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

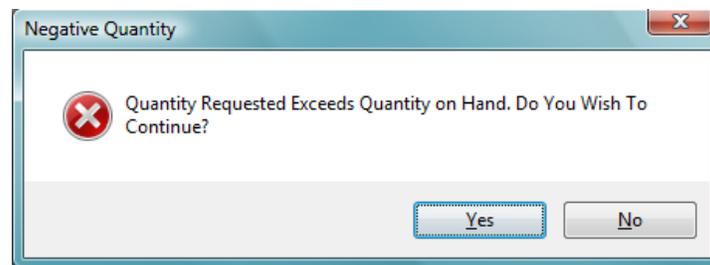
Insert – this button will attach the transaction information to the Work Order

Cancel – this button will cancel the transaction

Add new Record – Click this to create a new record

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

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:



Selecting **Yes** will take your inventory balance for that item into a negative. **(Note: This feature must be enabled.)** Selecting No will zero out your Quantity field and allow you to modify your Quantity issued.

Purchases

shortcut is Alt + P

Keep track of any purchases made from a vendor in order to complete this work order

Transactions for WO #:

Labor	Inventory Issued	Purchases	Vehicle Travel	Transactions Totals	
Purchase Type	Stock #	Description	Quantity -- Date	Unit Cost	Total
PO Number	Vendor ID	Vendor Name	Invoice Number	Paid From	Charged To
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Insert"/>	<input type="button" value="Cancel"/>				
No records to display.					
<input type="button" value="Add new record"/>					<input type="button" value="Refresh"/>
<input type="button" value="Config"/>					

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 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

Insert – this button will attach the transaction information to the Work Order

Cancel – this button will cancel the transaction

Add new Record – Click this to create a new record

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

Vehicle Travel

Shortcut is Alt + V

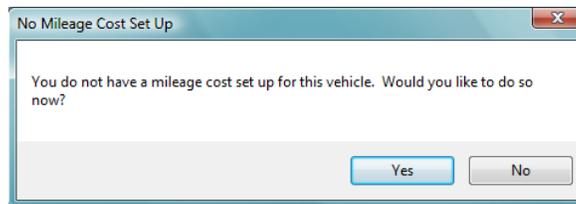
Keep track of mileage driven from site to site for work orders

Transactions for WO #:

Labor	Inventory Issued	Purchases	Vehicle Travel	Transactions Totals
Vehicle Tag Number	Vehicle Name	Miles Traveled Date	Mileage Rate Paid From	Total Charged To
<input type="text"/>	<input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>
<input type="button" value="Insert"/>	<input type="button" value="Cancel"/>			
No records to display.				
<input type="button" value="Add new record"/>				<input type="button" value="Refresh"/>
<input type="button" value="Config"/>				

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 now 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

Insert – this button will attach the transaction information to the Work Order

Cancel – this button will cancel the transaction

Add new Record – Click this to create a new record

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

Transactions Totals

Shortcut is Alt + T

Transactions for WO #: Close Form

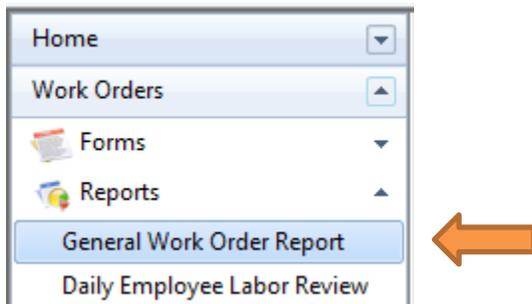
Labor	Inventory Issued	Purchases	Vehicle Travel	Transactions Totals
Refresh				
Total Labor:		\$0.00	Total Purchases: \$0.00	
Total Inventory:		\$0.00	Total Veh. Travel: \$0.00	
Total Labor Hours:		0	Grand Total: \$0.00	

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

Reports

General Report

From the main menu, click on **Work Orders** and Select **Reports**. From there you will need to Select **General Work Order Report**



You will then be shown a form where you can select the criteria in order to generate a Work Order report.

		<input type="button" value="Clear All"/>
Location	<input type="button" value="✖"/>	<input type="button" value="Open"/>
Status	<input type="button" value="✖"/>	<input type="button" value="Open"/>
Trade	<input type="button" value="✖"/>	<input type="button" value="Open"/>
Purpose	<input type="button" value="✖"/>	<input type="button" value="Open"/>
Budget	<input type="button" value="✖"/>	<input type="button" value="Open"/>
Project	<input type="button" value="✖"/>	<input type="button" value="Open"/>
Employee	<input type="button" value="✖"/>	<input type="button" value="Open"/>
Department	<input type="button" value="✖"/>	<input type="button" value="Open"/>
Priority	<input type="button" value="✖"/>	<input type="button" value="Open"/>
Work Order Description	<input type="text"/>	
Received Date	<input type="text"/>	<input type="button" value="📅"/>
	<input type="text"/>	<input type="button" value="📅"/>
Completion Date	<input type="text"/>	<input type="button" value="📅"/>
	<input type="text"/>	<input type="button" value="📅"/>
Report Title	<input type="text" value="General Work Order Report"/>	
Expand Description	<input type="checkbox"/> Expand Fields to show Entire Description?	
Sort Report By	First	<input type="button" value="▼"/>
	Second	<input type="button" value="▼"/>
	Third	<input type="button" value="▼"/>
	<input type="button" value="Build"/>	<input type="button" value="Refresh"/>

Location – indicates the location of the work order.

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

Trade – shows the trade for the work order.

Purpose – indicates the purpose of the work order.

Budget – indicates the budget the work order cost was pulled from.

Project – indicates if a specific project associated with this work order.

Employee – indicates the name of the tradesman assigned to this work order.

Department – indicates the department this work order is assigned to.

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

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 Key Word Search field. You can enter multiple words but are limited to 255 characters.

Received Date – Work Order start date.

Completion Date – Work Order completion date.

Report Title – this field will allow you to type a Title for the report.

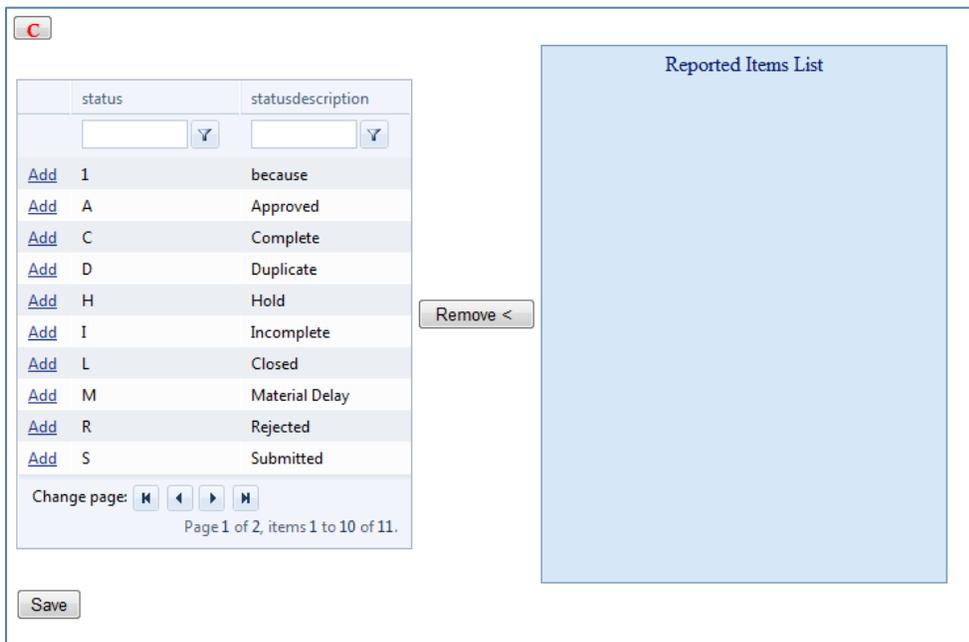
Expand Description – check this box if you want the report to show the entire Work Order Description you have entered.

Sort Report by – Allows the report to be sorted by up to 3 different fields.

Build - Click here to Build the report.

Refresh –Click here to Refresh the page.

Click on Open beside each criteria to include in the report. Example: Status



The screenshot shows a web-based report builder interface. On the left, there is a table of criteria with columns for 'status' and 'statusdescription'. Each row includes an 'Add' link and a 'Remove <' button. Below the table are navigation controls for 'Change page' and a 'Save' button. On the right, there is a large empty box labeled 'Reported Items List'.

	status	statusdescription
Add	1	because
Add	A	Approved
Add	C	Complete
Add	D	Duplicate
Add	H	Hold
Add	I	Incomplete
Add	L	Closed
Add	M	Material Delay
Add	R	Rejected
Add	S	Submitted

Change page: [Home] [Previous] [Next] [End]

Page 1 of 2, items 1 to 10 of 11.

Save

Click on **Add** beside the status you want added to the report and it will move the selection to the right pane. Repeat to make more selections.

The screenshot shows a web interface with a table of status options and a 'Reported Items List' pane. The table has columns for 'status' and 'statusdescription'. The 'Complete' status (C) is selected. The 'Reported Items List' pane shows 'C | Complete' with a checkbox. A 'Remove <' button is located between the table and the list pane. At the bottom of the table, there are pagination controls and a 'Save' button.

	status	statusdescription
Add	1	because
Add	A	Approved
Add	C	Complete
Add	D	Duplicate
Add	H	Hold
Add	I	Incomplete
Add	L	Closed
Add	M	Material Delay
Add	R	Rejected
Add	S	Submitted

Reported Items List

C | Complete

Remove <

Change page: [Home] [Previous] [Next] [End]

Page 1 of 2, items 1 to 10 of 11.

Save

Click Save to continue.

This will yield the criteria selection form with your selection marked with

		<input type="button" value="Clear All"/>
Location	<input type="checkbox"/>	<input type="button" value="Open"/>
Status	<input checked="" type="checkbox"/>	<input type="button" value="Open"/>
Trade	<input type="checkbox"/>	<input type="button" value="Open"/>
Purpose	<input type="checkbox"/>	<input type="button" value="Open"/>
Budget	<input type="checkbox"/>	<input type="button" value="Open"/>
Project	<input type="checkbox"/>	<input type="button" value="Open"/>
Employee	<input type="checkbox"/>	<input type="button" value="Open"/>
Department	<input type="checkbox"/>	<input type="button" value="Open"/>
Priority	<input type="checkbox"/>	<input type="button" value="Open"/>
Work Order Description	<input type="text"/>	
Received Date	<input type="text"/>	<input type="button" value="Calendar"/>
	<input type="text"/>	<input type="button" value="Calendar"/>
Completion Date	<input type="text"/>	<input type="button" value="Calendar"/>
	<input type="text"/>	<input type="button" value="Calendar"/>
Report Title	<input type="text" value="General Work Order Report"/>	
Expand Description	<input type="checkbox"/> Expand Fields to show Entire Description?	
Sort Report By	First	<input type="text"/>
	Second	<input type="text"/>
	Third	<input type="text"/>
	<input type="button" value="Build"/>	<input type="button" value="Refresh"/>

Once all selections have been made and fields completed, Click Build to generate the report.

http://acs.teamworkslive.com/reports/MsReports/genworptgen.aspx - Windows Internet Explorer

http://acs.teamworkslive.com/reports/MsReports/genworptgen.aspx

File Edit View Favorites Tools Help

1 of 2 100% Find | Next

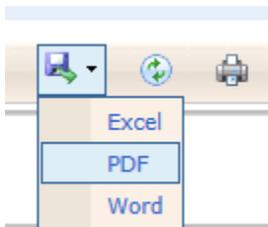
General Work Order Report

TeamWORKS Solutions, Inc.
Facilities and Maintenance Solutions

Dates Received: From 1/1/1900 To 1/1/1900 Dates Completed: From 1/1/1900 To 1/1/1900

-----Dates----- -----Codes----- -----Costs-----

Location ID	WO #	Dept	Assn. To	Received	Completed	Status	Priority	Trade	Failure	Budget	Hours	Labor	Material	Travel	Total	
Location	Room #	Description		Resolution												
301	7413	Maintenance	Maness, Johnny	5/4/2011		I		Plumbing				0	\$0.00	\$0.00	\$0.00	\$
ACS, Asheboro High School At Zoo School - water fountain is not working																
302	7421	Maintenance	Craven, Ricky	5/6/2011		I		GM				0	\$0.00	\$0.00	\$0.00	\$
ACS, South Asheboro Middle School Please hang Smart Board boom in in room 16.																
301	7444	Maintenance	Maness, Ralph	5/12/2011		I		GM				0	\$0.00	\$0.00	\$0.00	\$
ACS, Asheboro High School Door handle at right side at bus circle by computer help desk needs repair.																
301	7449	Maintenance	Winslow, William	5/13/2011		I		GM				0	\$0.00	\$0.00	\$0.00	\$
ACS, Asheboro High School Change the frequency on scoreboard controller at AHS																
312	7455	Maintenance	Winters, Ken	5/19/2011		I		GM				0	\$0.00	\$0.00	\$0.00	\$
ACS, Balfour Elementary School Clean gutters system-wide																

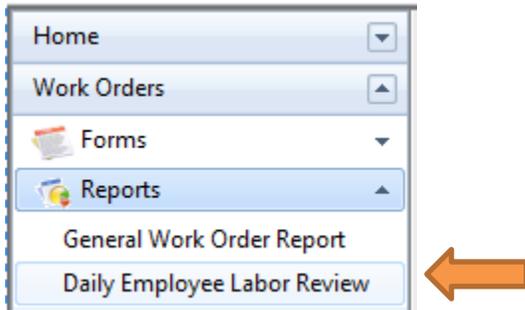


File can be saved in Excel, PDF, or Word

Daily Employee Labor Review

This report will show labor transactions for any employee, department or specific labor types specified in the report front.

From the main menu, Click on **Work Orders** and Select **Reports**. From there Select **Daily Employee Labor Review**



The following screen will appear.

NOTE: the Employee's labor has to be entered in order to have results

Please select an employee: Work Date:

Refresh |

W/O ID	Trans ID	Location	Hours	Requester	W/O Date	Trans. Date
No records to display.						
Total Hours:						

Select an employee from the drop down menu.

Please select an employee: Work Date: []

EmployeeID	Name
Arrellano, Luis	Arrellano, Luis
Cook, Kimberly	Cook, Kimberly
Craven, Ricky	Craven, Ricky
Hayes, David	Hayes, David
Maness, Johnny	Maness, Johnny
Maness, Ralph	Maness, Ralph
Mize, Mike	Mize, Mike
Otero, Luis	Otero, Luis
Shane, Michael	Shane, Michael
Wallace, Jeff	Wallace, Jeff

▼ Items 1-10 out of 12

Enter the Work Date or use the Calendar: By default it loads with the current date

Work Date:

August 2011

	S	M	T	W	T	F	S
32	31	1	2	3	4	5	6
33	7	8	9	10	11	12	13
34	14	15	16	17	18	19	20
35	21	22	23	24	25	26	27
36	28	29	30	31	1	2	3
37	4	5	6	7	8	9	10

Then click to generate the results.

Please select an employee:

Winslow, William

Work Date: 8/16/2011

[Build Report](#)

W/O ID	Trans ID	Location	Hours	Requester	W/O Date	Trans. Date
7676	15219	ACS, Charles W. McCrary Elementary School	2	dsummey	08/08/2011	08/17/2011
7677	15222	ACS, Charles W. McCrary Elementary School	2	dsummey	08/08/2011	08/17/2011

Refresh |   

Total Hours: 4



From the results you have several options

Export to Microsoft Excel, CSV (comma Separated Values) it will open it Excel and to open in Microsoft Word. From these formats you can save, email and print if needed.

Customer Support

Email: Support@goTeamWORKS.com

Telephone: Toll Free (866) 892-0034