

# On-Line Repair Request Application User's Guide

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## I. Work Order Overview

Work Order	Costs	Account	Work Description	Shop	Contact	Status	Date
2-602263	1	0	9000 EXIT 1 OUTSIDE DOOR WILLNOT LI	904 Lock	SALAAM	Issued	01/13/2003
2-602257	1	0	9000 IN ROOM104 THE EQUIPMENT ROOM	910 Pipe	SALAAM	Issued	01/13/2003
2-602215	1	0	9000 ROOM107 EXHAUST FAN WILLNOT C	902 Electric	SALAAM	Issued	01/13/2003
2-596167	2	0	5000 PLEASE PAINT (1) GUARD. COLOR=S	909 Paint, Plaster	DASPER	Issued	01/13/2003
2-596016	2	0	5000 PLEASE PAINT (3) GUARDS AS MARK	909 Paint, Plaster	DASPER	Issued	01/13/2003
2-600952	1	165	9000 ALARMS AT 68TH ST. KEEP ON GOIN	902 Electric	FRICKE	Issued	01/03/2003
2-600691	1	0	9000 NO.1 BOILER WATER COLUMN WHEP	910 Pipe	SALAAM	Issued	12/26/2002
2-600688	1	0	9000 2. BOILER KEEPS GOING OFF IN LOW	910 Pipe	SALAAM	Issued	12/26/2002
2-600605	1	146	9000 ROOM-102 IS COLD THERMOSTAT H	910 Pipe	SALAAM	Issued	12/23/2002
2-599122	1	0	9000 NEED REPAIR FOR SALTER TIRES. PU	919 Small Engine	SALAAM	Issued	12/11/2002
2-597703	1	30	9000 DOOR TO MAIN ENTER. LOCK IS IN	904 Lock	CLAY	Issued	12/02/2002
2-596801	1	0	9000 PLEAS REPLACES SCARED PLAXS GLAS	909 Paint, Plaster	SALAAM	Issued	11/20/2002
2-596167	1	164	9000 PLEAS PROVIDE SOME TYP OF COVE	907 Sheet Metal	SALAAM	Issued	11/19/2002
2-596016	1	325	9000 PLEAS PROVIDE SOME TYP OF COVE	907 Sheet Metal	SALAAM	Issued	11/19/2002
2-594534	1	229	9000 PLEASE CHECK CONTROLS IN ROOM	910 Pipe	SALAAM	Issued	11/07/2002

This screen gives you the basic information of the work orders.

*View the complete description of a work order:*

Click on the button right at the end of the field.

*Exit the application:*

Click on the *Exit*  button or *Action* on the menu and select *Exit*.

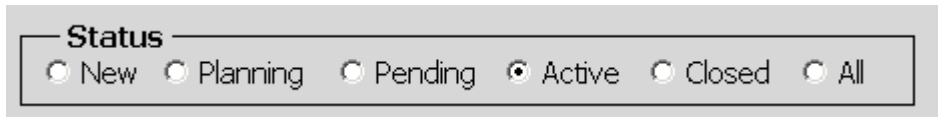
### A. Column Sort

Each of the following columns can be sorted by clicking on the button on the top of it.

1. Work Order
2. Costs
3. Account
4. Work Description
5. Shop
6. Contact (Last Name)
7. Status
8. Date (When work order was created).

## B. Query Data

You can do data querying based on most of the fields on the Work Order Overview.  
Query Using Status



**Status**

New  Planning  Pending  Active  Closed  All

Select your desired status in this section. All records that belong to the selected status will be displayed on the screen automatically after your selection.

New = Work Order is still “New”

Planning = Work order in “Planning” process

Pending = Work order in “Pending” process

Active = Issued Work Order

Closed = Completed Work Order

All = Every Work Order that has one of the above statuses.

### Query Using Date Range



**Date Selection**


From  To

Narrow down your selection to see within a range.

1. Type in the Date selection and press the *Enter* key on the keyboard.
2. Select a Status from the Status section to further narrow down your selection.



### Searching for a specific record:

In addition to a query using status and date range above, you can further narrow down your selection by using the Enter Query function (i.e., you can select status of new and then enter a query in one of the fields on the Work Order Overview to get a sub-query data).

1. You click on *Enter Query* button  or click on Query option from the pull-down menu and select *Enter Query*.
2. Click the cursor (vertical blinking bar) in the field(s) that you want data retrieval based on.
3. Enter your value in the field. If there is a List of Values that is included in the field to select, the bottom command line (line on the bottom of your screen) will tell you so.

Press Ctrl + L to display the list of values.

You can enter a sub-string to search on by entering a “%” sign before and after the sub-string.

4. Click the *Execute Query* button  or click on the Query option from the pull-down menu and select the *Execute Query* to get the data based on what you entered in step 3.
5. You can cancel your query before executing it or stop the executing process by clicking on the *Cancel Query* button  or clicking on Query option from the pull-down menu.

### C. **Copy Work Order to Survey button**



The purpose of this button is to provide a means of connecting a new work order to a survey. Before you use this button you should create a new work order first that corresponds to the question on the survey.

1. Highlight a question on the Survey (where you want to place or reference a work order).
2. Go to the Work Order Overview screen, highlight the Work Order that you have created, click the “*Copy Work Order to Survey*” button.
3. Click on the Survey tab to view the connection.

### D. **View the detail of a work order:**

1. Highlight the work order that you want to view the detail.
2. Click on “*View Work Order Detail*” button.  
Once the button is clicked, you will see the Work Order Detail screen.

## II. Work Order Detail

Work Order Detail with Current Status

Status	Date Modified
Issued	01/14/2003
New	01/13/2003

\* Required field

Shop\* XH - Lock

Payment Method TIME & MATERIALS

Account\* 3000 INFRASTRUCTURE MAINTENANCE

Acct. No.\* Or Acct Key & Object

First\* CHESTER N Last\* SALAM Phone\* 945-8900

Is this an emergency?  Estimate Required?

Request Id 2-51720-924 Work Order Type OTHER

Description\* EXIT 1 OUTSIDE DOOR WILL NOT UNLOCK WITH PRIMPUS KEY LOCK Edit

Date Needed\* Calendar 01/15/2003

Vehicle List UNKNOWN

Model  
Serial No.  
Description  
Current Reading

Equipment List

### A. Viewing Work Order Detail

This detail screen gives you more information of the work order you highlighted on the Overview screen. The current status is displayed on the top right-hand side of the screen.

Generally, no update or modification is allowed on this screen (all fields are gray<sup>1</sup>). The above image is how the screen looks like when it is not updateable or modifiable.

*Exception:*

If the current status of the selected work order is "New" and you are the one who created the work order, then you can update or modify it. All updateable or modifiable fields will be white.<sup>1</sup>

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<sup>1</sup> Grayed = No update or modify

## B. Modify Work Order Detail

This is how the screen looks when it is updateable or modifiable.

Oracle Forms Runtime - [W\_WORK\_ORDER]

Action Edit Query Block Record Field Window Help

Work Order Detail with Current Status

Building Name and No.	Work Order	Task No.	Status	Date Modified
68TH ST. EARLY CHILDHOOD - 328	2-604007	1	New	04/24/2003

\* Required field

Shop\* 532 - First Shop for Rec.

Payment Method FINE & MATERIALS

Account\* 5000 EDUCATIONAL MAINTENANCE

Acct. No.\* Or Acct Key & Object

First\* TRACEY Last\* NGUYEN Phone\* 24709

Is this an emergency?  Estimate Required?

Request Id Work Order Type NORMAL WEAR

Description\* TEST Edit

Date Needed\* Calendar 05/15/2003

Vehicle List LGT001 - LARGE LAWN TRACTORS Model GR1750 Equipment List


Serial No. 88482001 Brand Husograph

Description 100

Current Reading 0

### 1. Modify

Only fields are in white color are updateable or modifiable, gray color are not.

- Change the current data by clicking on the button (i.e., Shop, Account, Calendar, Vehicle and Equipment List) or by typing into the field (i.e., Description).
- Click on the *Save* button  to save the change(s).
- Exit the Work Order Detail screen and go back to the Overview screen:

Click on *Exit* button  on the tool bar

Or click on *Action* (pull-down menu) and select the *Exit* option.


### 2. Cancel Work Order


Check to “Cancel this work order?” check box to cancel the current work order.  
Select “Close” status on the Work Order Overview to view the cancelled work order(s).

### III. New Work Order

This is how the screen looks when you click on the New Work Order screen (all fields are gray).

#### A. Create new work order(s).


1. Click on New Work Order screen
1. Click on the *Insert* button  on the tool bar.

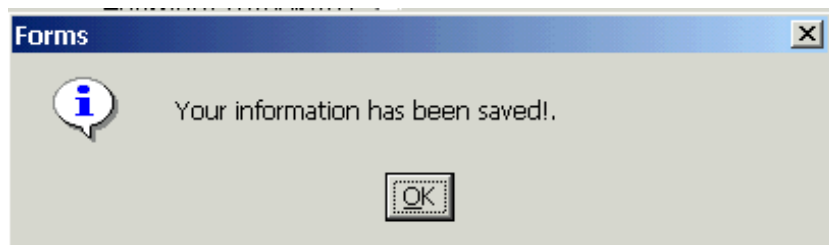
This is how the screen looks once the *Insert* button  is clicked (All fields are white<sup>2</sup>).

3. Fill in information for the required fields (with asterisks \*)
  - a. Shop:
    - Click on the button Shop. A list of shops will display.
    - Select the shop you want and then click on the “OK” button.
  - b. Payment Method:
    - The default value for this list is “*Time and Material*” for all shops.
    - For Electronic shop and depend on the payment method that the selected building has, the list has 2 values to select “*Time and Material*” and “*Maintenance Contract*”.
  - c. Account:
    - Click on the Account button. A list of available account for the shop and selected building will display.
    - Select the account type you want and then click on the “OK” button.
    - If you select the “*Hand Entered Account*” option from the list, you need to enter the data in either one of the following 2:
      - Account Code: is required.
      - Or Account Key and Object: is required.

<sup>2</sup> White = Updateable or modifiable

Combination of Key and Object is required but not Account Code, Key and Object.

- d. First (Name): Can be changed. It doesn't have to be your name (who created the work order).
  - e. Last (Name): Can be changed. It doesn't have to be your name (who created the work order).
  - f. Phone: The (building's) phone number that the shop can contact in regard to the Work Order.
  - g. Emergency: Check here if the Work Order needs to be done immediately.
  - h. Estimate Required: Check here if you want to receive an estimate before the shop works on the work order.
  - i. Request Id: Optional
  - j. Work Order Type: Default to "Normal Wear". It can be changed.
  - k. Description: For the work that needs to be done.  
Click on the Edit button. Type the description into the editor box.
  - l. Date Needed: When should the work be done.  
Enter in the date or click on Calendar button (the calendar will display).
  - m. Vehicle:
    - Click on the button you the list will display.
    - Select the vehicle that has problem and click on the "OK" button
  - n. Equipment:
    - Click on the button you the list will display.
    - Select the equipment that has problem and click on the "OK" button.
4. Click on the *Save* button  to save the record.
  5. Once the *Save* button is clicked, you should see the following message:



Click on the "OK" button.

You can repeat these 5 steps to create additional work order(s).

## **B. Modify Work Order**

This option is only available for work order with “New” status and user logged in is who created it.

1. Select “New” status under Status section
2. High light work order that need modification
3. Click on “*View Work Order Detail*” button
4. You are in Work Order Detail screen now, start updating/modifying your work order.

Only fields are in white color are updateable or modifiable, gray color are not. (See Work Order Detail-Modify Work Order Detail section for details of how to update/modify a work order).

## **C. Turn on the Insert button:**

If you have clicked this button from the Overview screen, it will be off (gray).


To turn it on (green color)  from off function  (gray color)

1. Click on the menu item *Record*
2. Select *Clear* option from the drop down list.

## IV. Survey

Questionnaire	Answer	Comments	Work Order	Vandalism
1 To be sure of positive knowledge of the condition of all exits	Yes		0	<input type="checkbox"/>
2 Are they in good condition?	Yes		0	<input type="checkbox"/>
3 Are all exit doors, including doors to fire escapes, equipped	No		2-602263	<input type="checkbox"/>
4 Are these devices tested daily during the school year to insure	Yes		0	<input type="checkbox"/>
5 If not daily, how often?	*		0	<input type="checkbox"/>
6 Are classroom doors equipped with safety type locks permitted	*		0	<input type="checkbox"/>
7 List of rooms not so equipped:	*		0	<input type="checkbox"/>
8 Are supplementary locks, bolts or chains used on any exit doors	*		0	<input type="checkbox"/>
9 List the the doors in your building having self-closing devices	*		0	<input type="checkbox"/>
10 Does the Boiler Room, Oil Room, and Paint Room have fusible links	*		0	<input type="checkbox"/>
11 Enter any other rooms if they have fusible links.	*		0	<input type="checkbox"/>
12 Are these doors kept unobstructed and closed, or free to open	*		0	<input type="checkbox"/>
13 Are there outside fire escapes on your building?	*		0	<input type="checkbox"/>
14 Are they free from obstruction and in good working order?	*		0	<input type="checkbox"/>
15 Number of outside fire escapes:	*		0	<input type="checkbox"/>

### A. Completing a survey:

1. Select a survey type and survey period from the drop down lists. Status of the current survey period is displayed in red.
2. Replace asterisk (\*) in each question with appropriate answer. Valid answers are either *N/A*, *Yes* or *No*.
3. Click on the button at the end of the Comment column to type in any text if necessary.
4. Click on the *Save*  button to save your answers.

### B. Updating or changing a survey

If a survey has not been “*Authorized*” (Status), it can be updated. Updating survey process is as the same as completing a survey (see #2 above).

### C. Referencing or creating a work order

1. If you have an existing work order and want to reference it into a question:
  - a. High light the question
  - b. Go work order Overview and select the work order.
  - c. Click on “Copy Work Order to Survey” button.
  - d. 2. If you want to create a work order for a question:

- e. See New Work Order-Create new Work Order(s) section
- f. Repeat steps A thru C above.

## V. Building Detail

**Building Detail**

Name	Address	City	State	Zip
88TH ST. EARLY CHILDHOOD	6720 WEST MOLTKE AVENUE	MILWAUKEE	WI	53230-1399
ID	Sq. Feet	Historical	Building Type	School Type
328	22019	N	ELEMENTARY	Public - MPS
				Year Built
				1917

**Drawings**

Floor	Fr. Type	Description
1st	1	Elem\328\328-1.dwg
2nd	2	Elem\328\328-2.dwg
Attic	99	Elem\328\328-ATTIC.dwg
Roof	300	Elem\328\328-r.dwg

**Areas**

Area Type	Area ID	Signage	Date End	Comments
GENERAL	100	110A		
GENERAL	102	111		
GENERAL	102A	111A		
GENERAL	103	114		
GENERAL	104	112A		
GENERAL	105	113A		
GENERAL	106	112		
GENERAL	107	113		
GENERAL	110	110		
GENERAL	113B	113B		

**Area Changes**

Code:  Date:

Area:  Into:

Comments:

This screen gives you the detail of the building that is selected on the Overview screen.

### A. Drawings section

Gives you information about the building floors and their drawings.

*View a floor's drawing:*

1. Highlight the floor that you want to see the drawing for.
2. Click on the button at the end of the "Description" field to see the drawing of that selected floor.

### B. Areas section

Gives you information about the building's floors.

*View the complete Comment field:*

Click on the button at the end of the field.

### C. Column Sort

By ascending or descending order by clicking on the corresponding button on the top of the following columns.

1. Area Type
2. Area Id
3. Signage (room numbers).