

# MAINTENANCE CONNECTION UNIVERSAL WORK ORDERS USER GUIDE

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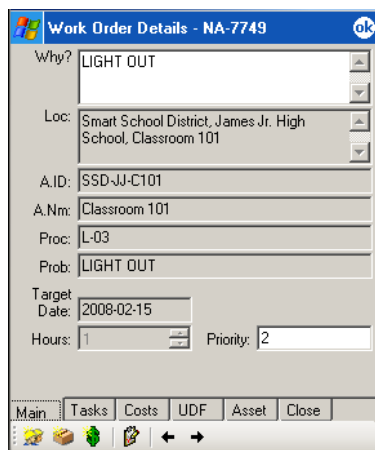
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## INTRODUCTION

Maintenance Connection Universal Work Orders(UWO) is a cost effective, Windows Pocket PC (Windows Mobile) and Windows PC Desktop solution for taking your Maintenance Connection (MC) work orders into the field. The application utilizes the advanced functionality of Pocket PCs including wireless syncing ability. The desktop version is suitable for laptops that have limited connectivity to the network. Although there are slight visual differences between the two versions, the processes described in this manual are accurate for both versions.

UWO works on a check out/in system. The Work Order(WO) is checked out onto the Mobile device and locked within MC. After the WO is completed it is then its checked back into MC and cleared off the PPC.

Once the WO is complete and checked in it is unlocked on the main MC system and is ready to be changed or closed by the administrator.



This screen is typical of a Pocket PC device with supplied applications including Maintenance Connection Mobile.

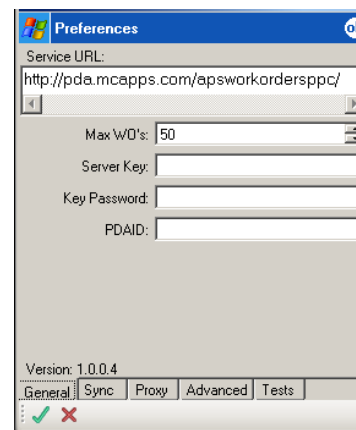
## CONFIGURATION

Configuration of UWO consists of entering in the URL of the mobile web service, the server key, and the PDAID. This information will be provided to you by the MC install technician or by your local MC administrator.

### STEP 1 – CONFIGURATION SETTINGS



Click the Preferences button after opening UWO



This is default setting for UWO, the following fields must be correctly filled out for UWO to connect to the server.

**Service URL:**

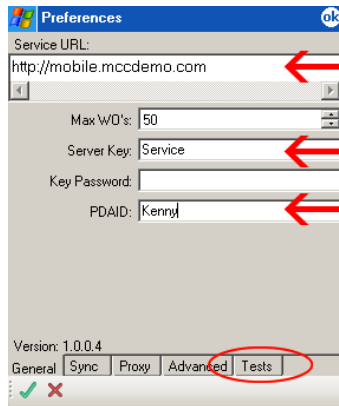
**Server Key:**

**PDAID:**

Obtain these settings and proceed to step two.

**STEP 2 – THE TESTS TAB**

Using the information provided by your MC install technician or by your local MC administrator enter in the following:



**Service URL:**

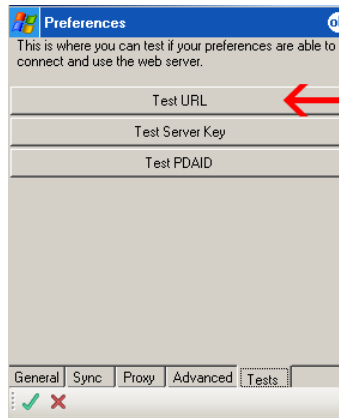
**Server Key:**

**PDAID:**

The entries on the screen capture are only examples.

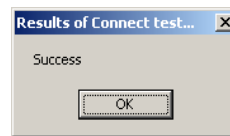
Once entered press the “Tests” on the bottom of the screen to save and continue to the testing stage.

**STEP 3 – TESTING THE URL**

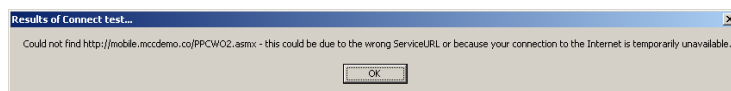


The first step in the testing process is to test the URL entered in Step two. Click on the Test URL button and you will receive one of two messages.

A successful connection will return the following:



If the mobile device is unable to connect to the URL the following will be displayed:



If you receive this message either the URL entered is incorrect, or your connection to the server is not working.

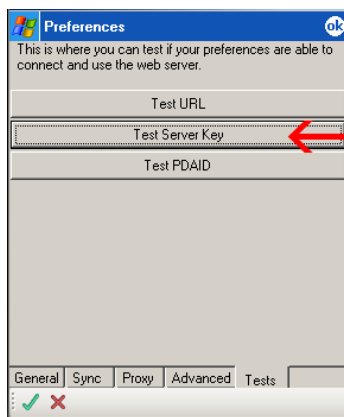
To resolve the URL double check your entry in Step 2. If there are no errors contact your MC install technician or your local MC administrator.

To confirm your connection to the server is working you can open a web page on your PDA or check any other application that uses the same connection. If you are unable to use other applications contact your local network administrator.

If you have an error, resolve it prior to proceeding with the other tests.

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#### STEP 4 – TESTING THE SERVER KEY

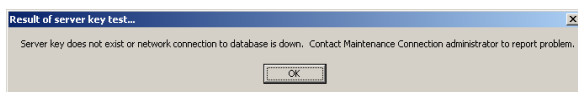


The second step in the testing process is to test the Server Key entered in Step two. Click on the Test Server Key button and you will receive one of two messages.

A successful connection will return the following:



If the mobile device is unable to connect to the Server Key the following will be displayed:



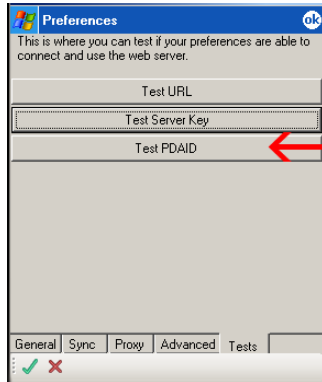
If you receive this message either the Server Key entered is incorrect, or your connection to the server is not working.

To resolve the Server Key double check your entry in Step 2. If there are no errors contact your MC install technician or your local MC administrator.

To confirm your connection to the server is working you can open a web page on your PDA or check any other application that uses the same connection. If you are unable to use other applications contact your local network administrator.

If you have an error, resolve it prior to proceeding with the other tests.

STEP 5 – TESTING PDAID



The third step in the testing process is to test the PDAID entered in Step two. Click on the Test PDAID button and you will receive one of two messages.

A successful connection will return the following:



If the mobile device is unable to find the PDAID the following will be displayed:



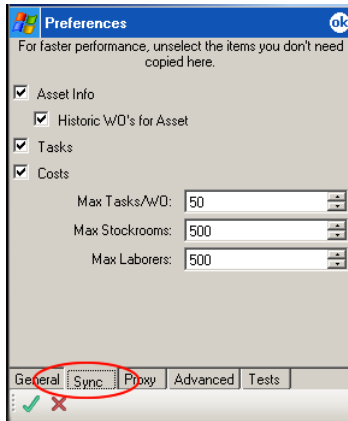
If you receive this message either the PDAID entered is incorrect, or your connection to the server is not working.

To resolve the PDAID double check your entry in Step 2. If there are no errors contact your MC install technician or your local MC administrator.

To confirm you connection to the server is working you can open a web page on your PDA or check any other application that uses the same connection. If you are unable to use other applications contact your local network administrator.

If you have an error, resolve it prior to proceeding with the next step.

**STEP 6 – THE SYNC TAB**



Click on the “Sync” tab to display the screen to your left. The Sync screen lets you configure how much information is downloaded to your PDA.

Decide which of the items are required for your work environment and then select accordingly.

**Asset Info:** Detailed information about the assets that is being repaired.

**Historic WO’s for Asset:** Past work orders for the asset, to help with knowledge of past repairs.

**Tasks:** The tasks linked to the procedure on the work order.

**Costs:** A list of estimated and actual costs of repairs

**Max Task/WO:** How many tasks per work order are downloaded.

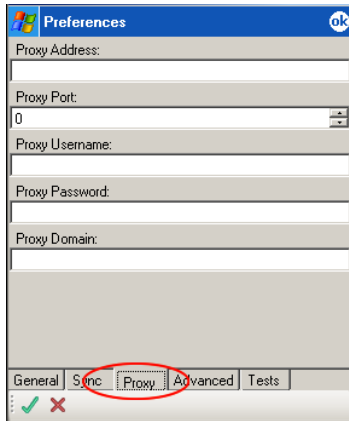
**Max Stockrooms:** How many stockrooms are downloaded.

**Max Laborers:** How many laborers are downloaded.

To improve performance it is recommended that each of these items be adjusted according to your organization. It is important to discuss these settings with your Maintenance Connection representative. If you set these numbers too high the performance of you device may degrade. If you set the numbers too low you may not have the information you need to complete the WO.

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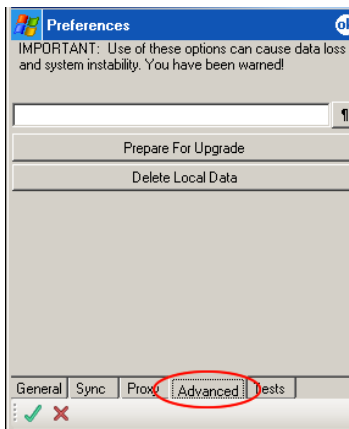
*STEP 7 – THE PROXY TAB*



Please note: For the purpose of this manual the Proxy tab is not covered. The proxy tab is only used in special circumstances and is normally configured by your network administrator.

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*STEP 8 – THE ADVANCED TAB*



The advanced tab is used when synchronization errors occur or when the software is going to be upgraded.

If your PDA software is going to be upgraded click the “Prepare for Upgrade” button.

If you are having issues syncing data with your PDA click the “Delete Local Data” button and then attempt the synchronization again.



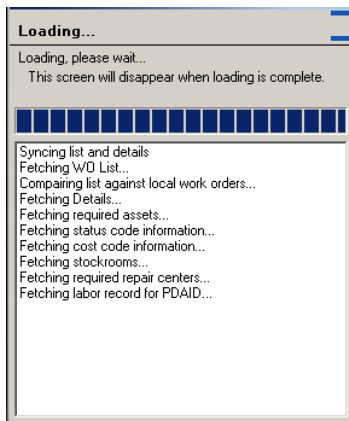
## WORKING WITH WORK ORDERS (WO)

### SYNCING WORK ORDERS TO SERVER

#### STEP 1 - THE SYNC BUTTON

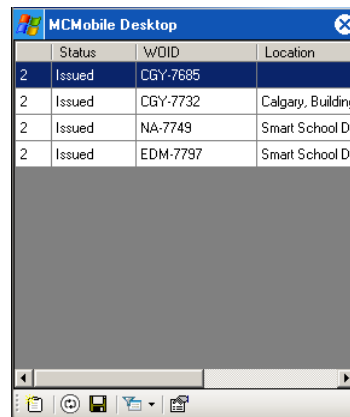


Click the synchronize button as shown to the left to perform the synchronization. The synchronization will allow you to use your device without being connected to your network or computer. The synchronization copies both data to your device and from your device.



While the device is being synchronized the following screen will appear for a few seconds to a few minutes depending on the number of WO's assigned to the user.

After Synchronization is complete a list of WO will be visible as shown below



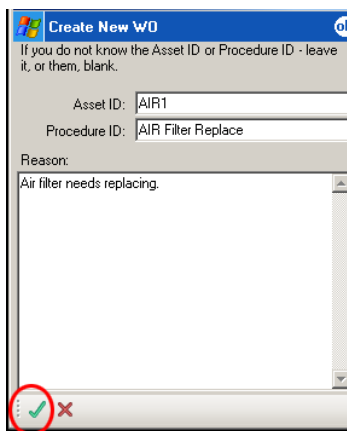
Status	WOID	Location
2	Issued	CGY-7685
2	Issued	CGY-7732
2	Issued	NA-7749
2	Issued	EDM-7797

## CREATING A NEW WORK REQUEST

### STEP 1- CREATING A NEW WORK REQUEST



Press the new WO button as shown to the left.



**Create New WO**  
If you do not know the Asset ID or Procedure ID - leave it, or them, blank.

Asset ID: AIR1

Procedure ID: AIR Filter Replace

Reason:  
Air filter needs replacing.

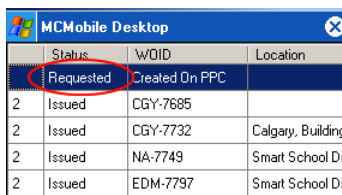
The options for creating a new WO are Asset ID, Procedure ID and Reason.

**Asset ID:** If known enter the Asset ID of the item requiring maintenance. If unknown enter a location/description of the assets to assist the administrator in completing the WO.

**Procedure ID:** If known enter the Procedure ID or leave blank.

**Reason:** Enter the reason for the WO.

When complete press the  in the bottom left corner of the screen to submit.



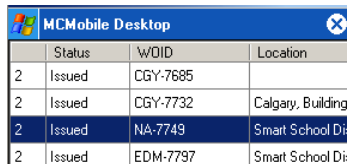
Status	WOID	Location
Requested	Created On PPC	
2 Issued	CGY-7685	
2 Issued	CGY-7732	Calgary, Building
2 Issued	NA-7749	Smart School Dis
2 Issued	EDM-7797	Smart School Dis

After submission the request will show on the top of your list as “requested”. At this stage the WO only exists on your device and is not uploaded to MC until your next sync. After the sync it will no longer show up because it still needs to be approved. If the WO is assigned to this PPC and after approval by your administrator the work order status will change to issued and once again show up on the device.

If the work needs to be completed immediately you change the status to issued and then completed as shown on page 18 of this manual.

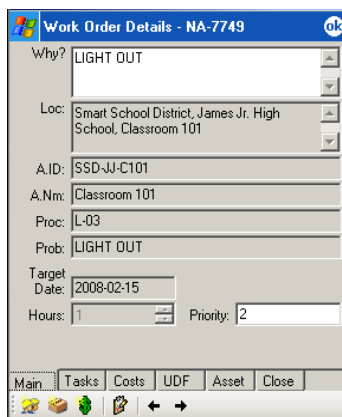
## UPDATING A WORK ORDER.

### OPENING A WO



Status	WOID	Location	
2	Issued	CGY-7685	
2	Issued	CGY-7732	Calgary, Building
2	Issued	NA-7749	Smart School Dis
2	Issued	EDM-7797	Smart School Dis

Double click on the WO you are going to update.



Work Order Details - NA-7749

Why? LIGHT OUT

Loc: Smart School District, James Jr. High School, Classroom 101

A.ID: SSD-JJ-C101

A.Nm: Classroom 101

Proc: L-03

Prob: LIGHT OUT

Target Date: 2008-02-15

Hours: 1 Priority: 2

Main Tasks Costs UDF Asset Close

The initial WO screen is primarily read only information only with the exception of the “Why” field and the “Priority Field”.

The field descriptions are:

**Why?:** The reason for the work order

**Loc:** Location of the Assets

**A ID:** Asset ID

**A Nm:** Asset Name

**Proc:** ID of the procedure to be performed

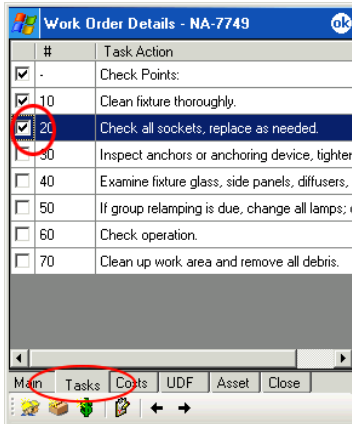
**Problem:** Problem code ID

**Target Date:** Date targeted for completion

**Hours:** Estimated hours to do job

**Priority:** Current Priority

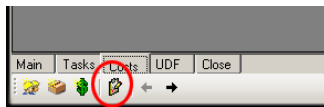
WO TASKS



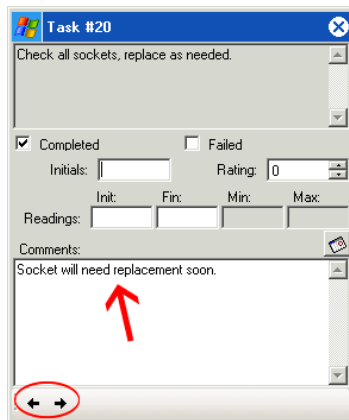
The WO task are listed in order the procedure is meant to be completed.

The operator is expected to check off all tasks completed and can then move onto the Costs Tab

To set all of the tasks complete at once click the icon as shown below.



Please note, the tasks will not show as complete until you go to another tab.

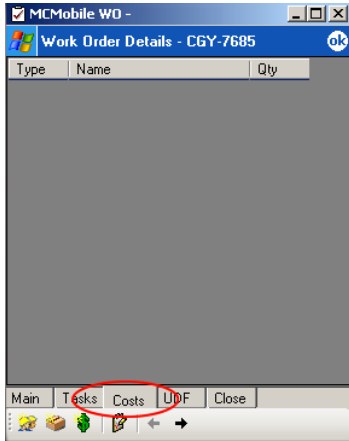


For each task you can enter in further details by clicking on the task. The following fields can be filled out:

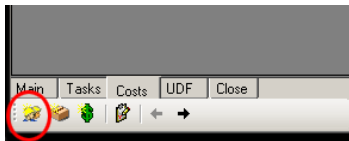
- Completed:** Check if task has been completed.
- Failed:** Check if item in question has failed
- Initials:** Enter initials of person completing the work
- Rating:** Used if item has a rating code
- Readings Init:** If a meter, enter in the initial meter reading
- Readings Fin:** If a meter, enter in the final meter reading
- Comments:** Any comments pertinent to the task

It's important to note that you can scroll through all the task by using the arrow buttons on the bottom left of the school.

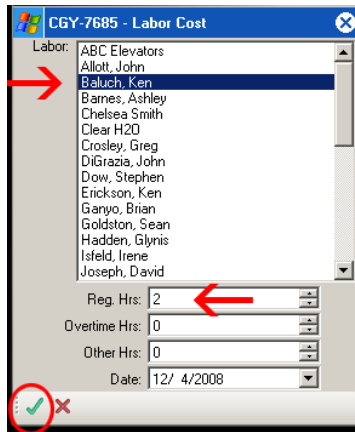
WO COSTS




Click on the costs tab to open the WO Costs area.

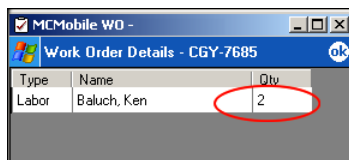


Click on the "Add New Labor" icon as show to the left

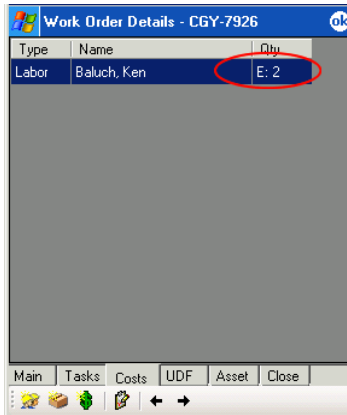


To add a new labor cost.

1. Select the employee
2. Enter in the hours, overtime hours, and other hours
3. Press the 

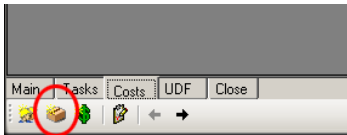


The hours will be confirmed and shown on the screen.

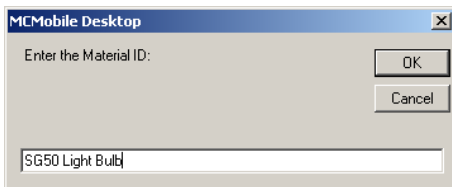


Note: If there are estimates assigned to the WO they will show in the list. If you click on the estimate the new labor cost screen will appear with the employee name already selected.

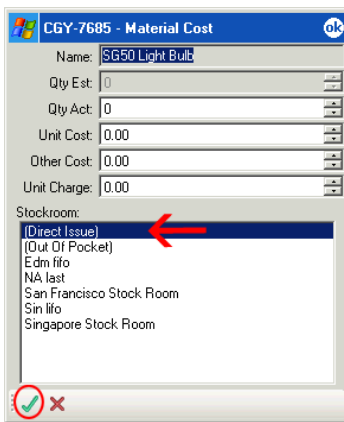
ADDING MATERIAL COSTS



Click on the "Material Costs" icon as show to the left



A dialog box similar to the one on the left will appear. Enter in the Material ID number.



Enter in the following as required:

**Qty Act:** Actual quantity of item used

**Unit Cost:** If known

**Other Cost:** If applicable

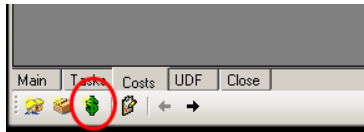
**Unit Charge:** Cost charged to client (if different)

**Stockroom:** Select Direct Issue if it is an item that is not normally stocked but is tracked in the inventory, Out of pocket if it is an item that was purchased by the employee for this WO. Or select the name of the stock room the item was taken from. Press the to continue

Labor		L: 2
Labor	Baluch, Ken	L: 2
Material	test	L: 0
Material	SG50 Light Bulb	L: 2

The material cost will be shown in the costs list along with the Labor costs.

### ADDING OTHER COSTS



Click on the "Other Costs" icon as show to the left

CGY-7685 - Other Cost

Name: Parking

Desc: Was unable to park in employee parking and had to use metered parking

Actual Cost: 3.00

Date: 12/ 4/2008

Invoice:

Submit buttons: [OK] [X] [Checkmark]

Enter in the following fields to complete the other cost.

**Name:** The name of the item/service purchased

**Desc:** The description of the item/service purchased

**Actual Cost:** The cost of the item/service

**Date:** The date of the purchase

**Invoice:** The invoice number if applicable

When complete press the to submit.

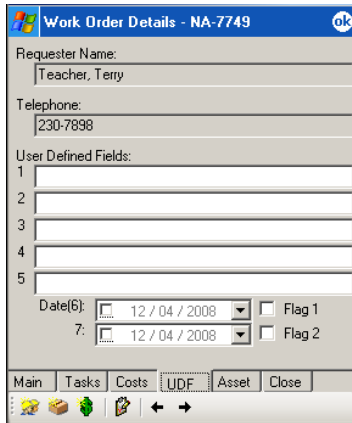
Labor	Baluch, Ken	L: 2
Material	test	L: 0
Material	SG50 Light Bulb	L: 2
Other	Parking	3 (0)

Similar to Labor and Material Costs, the Other costs will appear in the list of costs.

### USER DEFINED FIELDS



Click on the UDF tab to view the user defined fields



The user defined fields are optional and will be assigned according to the needs of your organization.

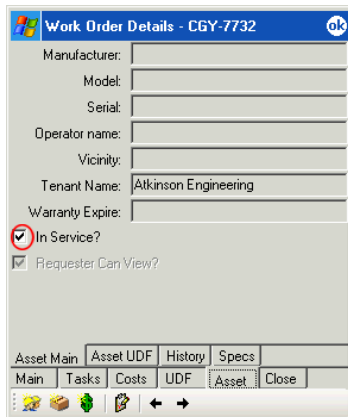
Enter in the details and proceed to another tab to continue.

### THE ASSET TAB



The asset tab contains 4 sub tabs:

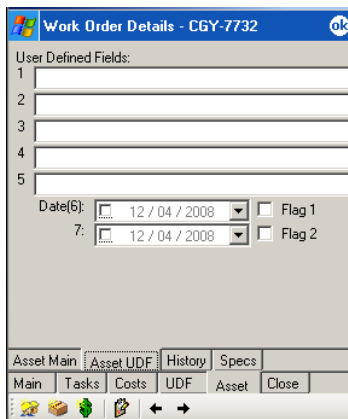
Asset Main, Asset UDF, History, and Specs



The Asset Main screen is primarily read only information on the asset. If the asset is being taken out of service the checkmark on the “In Service” field should be removed.

If the asset is being placed back in service then the “In service” field should be checked off.

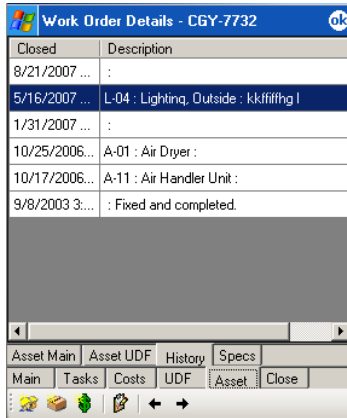
In order to have the In Service status show up on the main database, please remember to sync your device.



The Asset User Defined Fields are optional and will be assigned according to the needs of your organization.

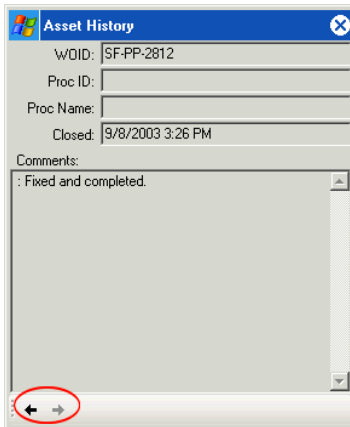
Enter in the details and proceed to another tab to continue.





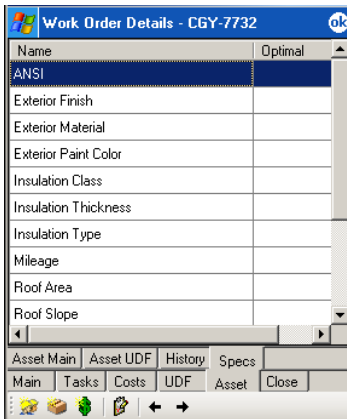
The History Tab will display a list of past work orders issued on this Asset.

Double click the WO to view the details.



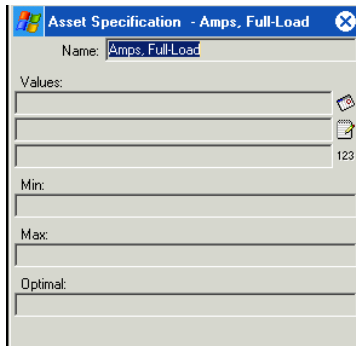
You can cycle through the past work orders using the left and right arrow keys at the bottom left of the screen.

Click the white X at the top right of the screen when complete.



The Specs tab under Asset lists out all the pertinent specifications about the asset as well as the optimal setting for the specification.

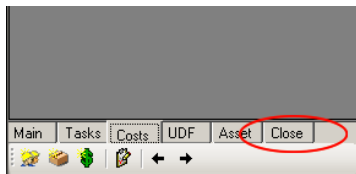
To view detailed information on any spec click on it to open.



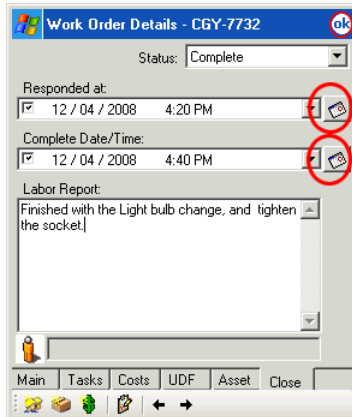
Any other values regarding the spec will be displayed.

This information is for reference only.

### CLOSING A WO

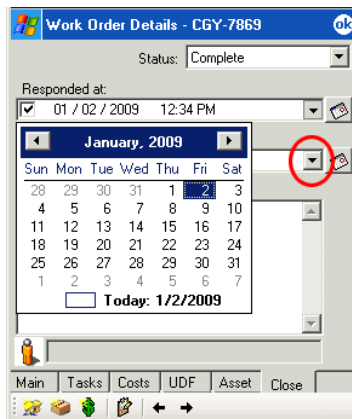


To close a work order, begin by clicking the close tab as show to the left.



To complete the work order fill out/adjust the Responded at, Complete Date/Time and Labor Report fields and then click on "OK" to complete.

To enter the current date & time click the calendar button to the right of the date fields.



To enter a specific date, click on the drop down box to the right of the date field and pick a date from the calendar.

Status	WOID	Location
2 Issued	CGY-7685	
2 Complete	CGY-7732	Calgary, Building
2 Issued	NA-7749	Smart School Dis
2 Issued	EDM-7797	Smart School Dis

You will now see the WO listed as Complete in the status field. It is recommended that you perform a synchronization as soon as possible to update the WO on the server.

Click the synchronization button on the bottom of the screen.