Administrator's Manual

Rev 2/1/2013

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Work Orders

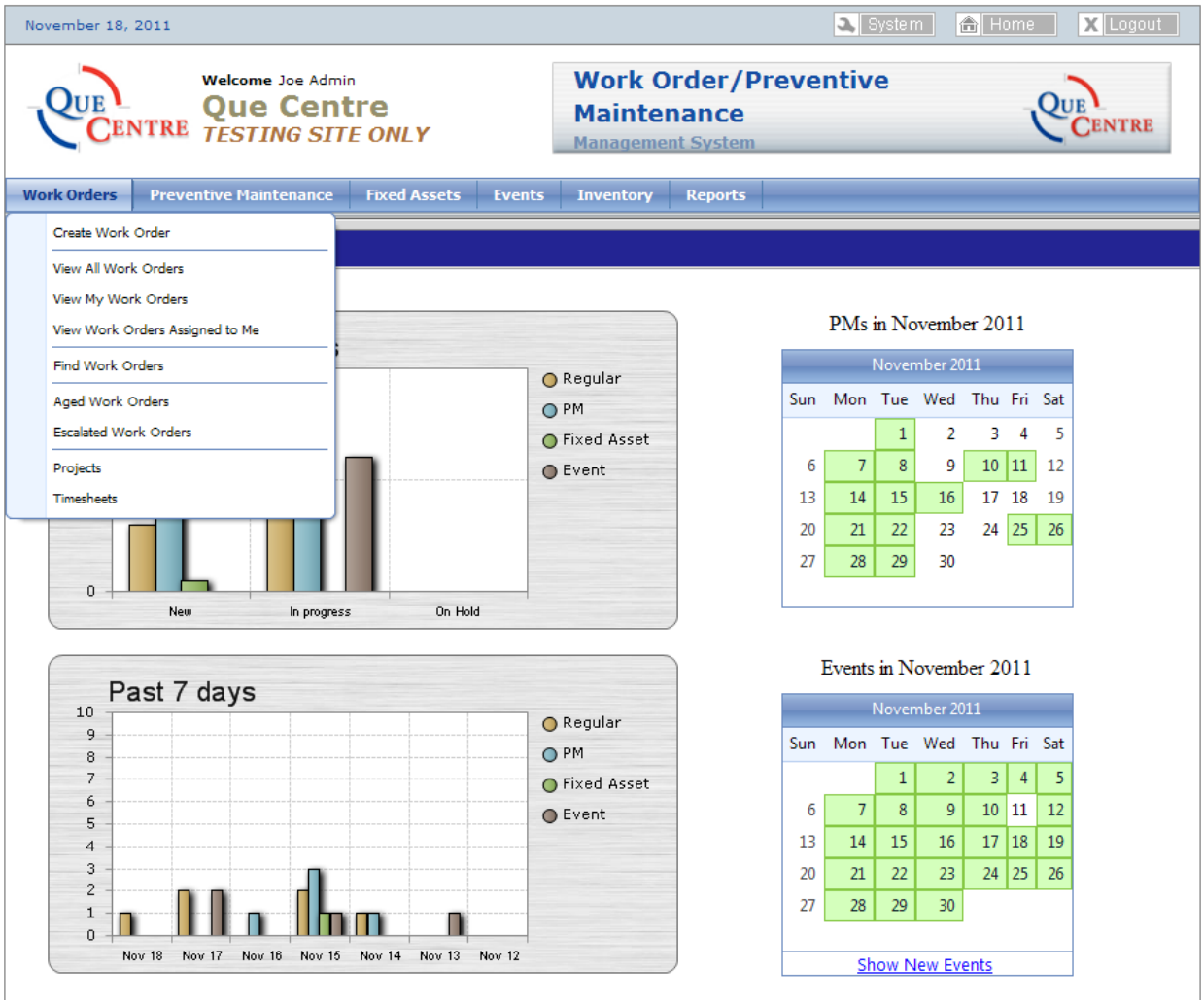


Figure 1 Dashboard - Work Orders

Clicking on the Work Orders tab at the top of the Dashboard will open a drop down box with Work Order related choices. The choices available will depend on which privileges the logged in user has been assigned.

Create Work Order

Click on the Work Orders tab at the top of the Dashboard, then click on Create Work Order. The Create New Work Order is opened.

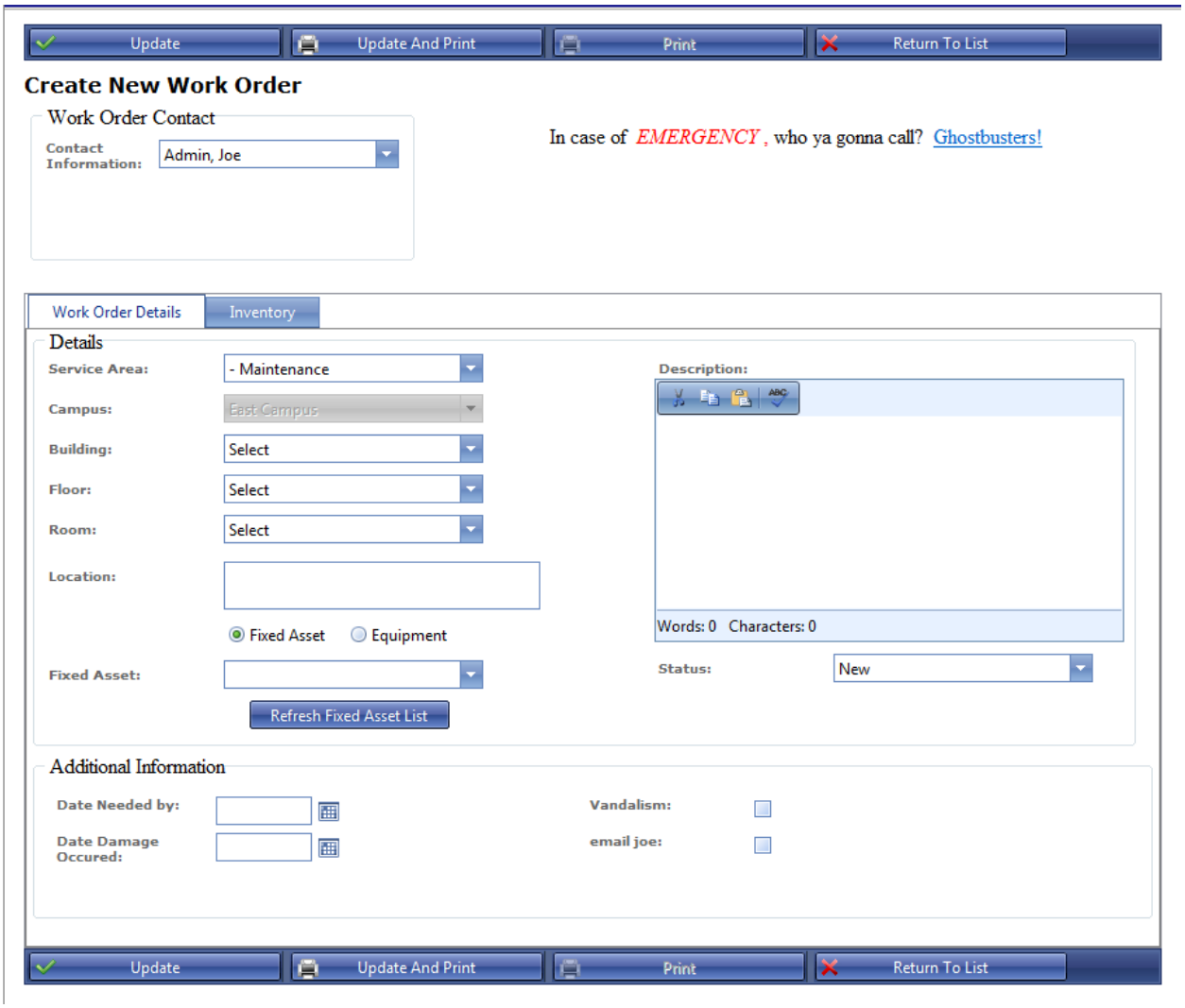


Figure 2 Create New Work Order

Contact Information

The Contact Information is automatically filled out with the logged in user's name. In some cases you may be creating a Work Order for someone else. In that case, the drop down box contains the names of all users in the system. This is useful if Work Orders are entered into Que Centre by one staff member.

Details

The central section of the Create Work Order page contains basic details about the Work Order. Service Area, Location and Description are filled out here. If a user has selected a Favorite

Service Area or a Favorite Location, those fields will be automatically filled in. If they are filled in, they can be changed as needed.

Details (cont)

To see a list of Fixed Assets click the appropriate radio button and then click Refresh Fixed Asset List. A list of Fixed Assets will appear in the drop down box. The same is true for Equipment. Select the Equipment radio button, click Refresh Equipment List and a list of Equipment will appear in the drop down box

Status

The default status for a Work Order is New. The Status drop down box contains a list of statuses the logged in user has permission to use. Change the status here as appropriate.

Additional Information

The bottom section of the Create Work Order page is customizable to your particular needs. Que Centre Support Staff will help you determine what information you need to capture and will set up custom fields and apply them to various stages of Work Orders. When additional information is filled out in this area, it will be carried forward the life cycle of a Work Order.

Save Work Order

Once the Work Order is filled out, click the Update button at the top of the screen to submit the Work Order.

If you wish to return to the Work Order List without submitting the Work Order, click on the Return to List button.

If you would like to submit and print the Work Order, click on the Update and Print Button

View All Work Orders

Click on the Work Orders tab at the top of the Dashboard, then click on View All Work Orders. The list of all Work Orders is opened.

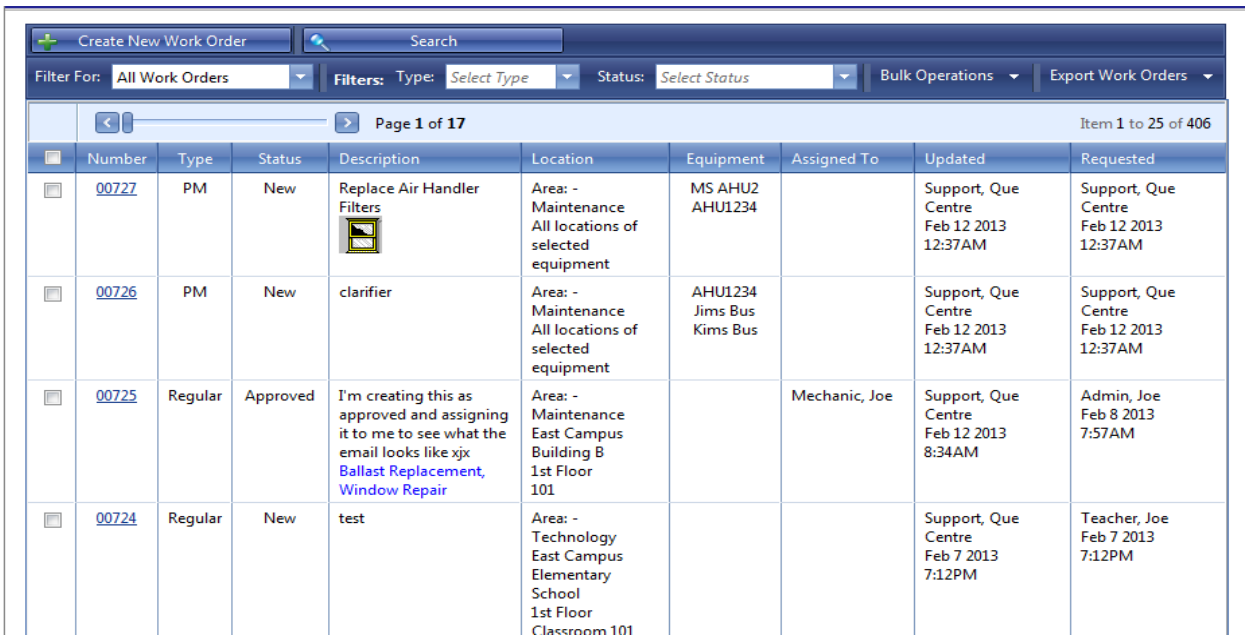


Figure 3 Work Orders - View All Work Orders

Filter

Filters are available on all the View Work Order screens

Work Orders can be filtered by Type or Status. There is also a find option that allows you to search on different fields, as well as a Bulk Operation tab and an Export Work Order tab.

Bulk Operations

Bulk Operations are available on all the View Work Order screens

Bulk Update

Status and Assigned To fields can be updated for multiple Work Orders at one time. All Work Orders must in the same Service Area to user the Bulk Update function. Click the checkbox next to the Work Orders that you want to update and then click Bulk Update under the Bulk Operation tab.

Bulk Print

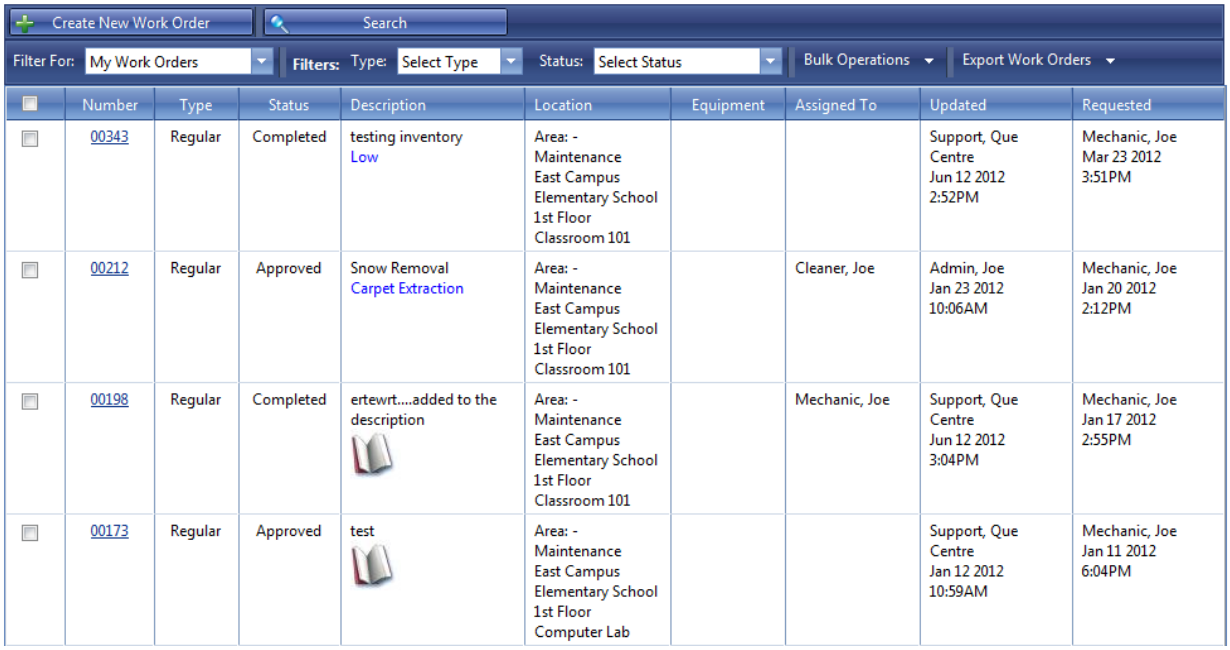
Multiple Work Orders may be selected and printed. Click the checkbox next to the Work Orders that you want to print and then click Bulk Print under the Bulk Operation tab.

Export Work Orders

Work Orders can also be exported to Word or Excel. Click the checkbox next to the Work Orders that you want to export and then click either Export to Excel or Export to Word under the Export Work Orders tab.

My Work Orders

The My Work Orders tab allows you to see Work Orders the logged in user has created. Filter and Bulk Operations function as described in the View All Work Orders section on page 20.

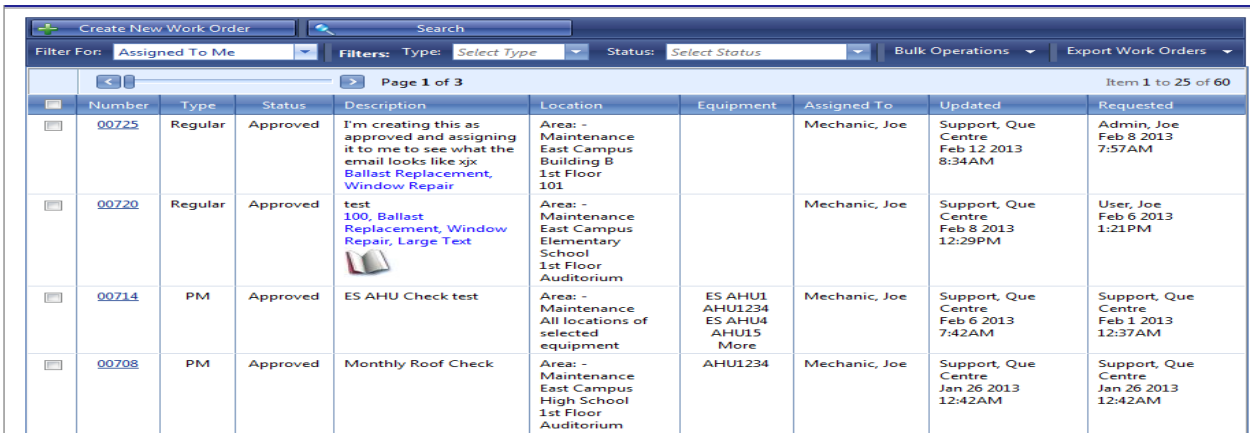


Number	Type	Status	Description	Location	Equipment	Assigned To	Updated	Requested
00343	Regular	Completed	testing inventory Low	Area: - Maintenance East Campus Elementary School 1st Floor Classroom 101			Support, Que Centre Jun 12 2012 2:52PM	Mechanic, Joe Mar 23 2012 3:51PM
00212	Regular	Approved	Snow Removal Carpet Extraction	Area: - Maintenance East Campus Elementary School 1st Floor Classroom 101		Cleaner, Joe	Admin, Joe Jan 23 2012 10:06AM	Mechanic, Joe Jan 20 2012 2:12PM
00198	Regular	Completed	ertewrt....added to the description	Area: - Maintenance East Campus Elementary School 1st Floor Classroom 101		Mechanic, Joe	Support, Que Centre Jun 12 2012 3:04PM	Mechanic, Joe Jan 17 2012 2:55PM
00173	Regular	Approved	test	Area: - Maintenance East Campus Elementary School 1st Floor Computer Lab			Support, Que Centre Jan 12 2012 10:59AM	Mechanic, Joe Jan 11 2012 6:04PM

Figure 4 My Work Orders

Assigned to Me

The Assigned to Me tab displays a list of Work Orders currently assigned to the logged in user. Filter and Bulk Operations function as described in the View All Work Orders section on page 20.

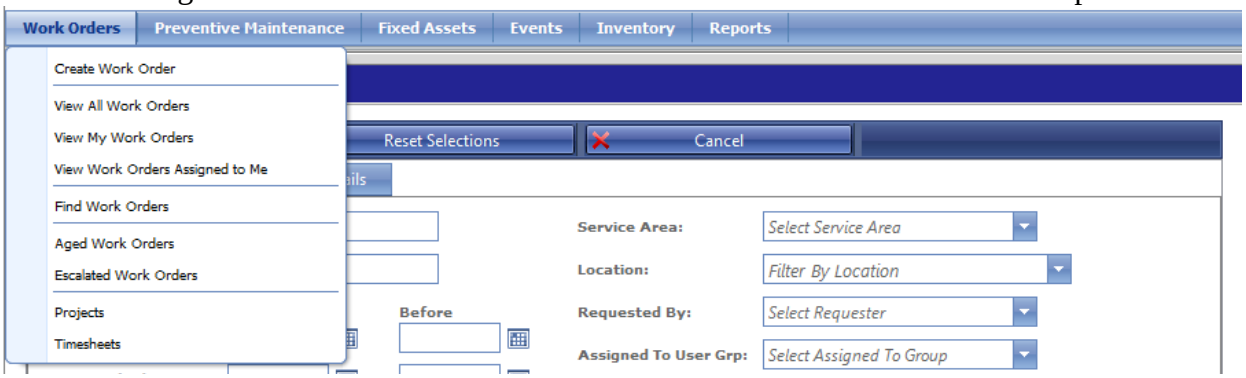


Number	Type	Status	Description	Location	Equipment	Assigned To	Updated	Requested
00725	Regular	Approved	I'm creating this as approved and assigning it to me to see what the email looks like xjx Ballast Replacement, Window Repair	Area: - Maintenance East Campus Building B 1st Floor 101		Mechanic, Joe	Support, Que Centre Feb 12 2013 8:34AM	Admin, Joe Feb 8 2013 7:57AM
00720	Regular	Approved	test 100, Ballast Replacement, Window Repair, Large Text	Area: - Maintenance East Campus Elementary School 1st Floor Auditorium		Mechanic, Joe	Support, Que Centre Feb 8 2013 12:29PM	User, Joe Feb 6 2013 1:21PM
00714	PM	Approved	ES AHU Check test	Area: - Maintenance All locations of selected equipment	ES AHU1 AHU1234 ES AHU4 AHU15 More	Mechanic, Joe	Support, Que Centre Feb 6 2013 7:42AM	Support, Que Centre Feb 1 2013 12:37AM
00708	PM	Approved	Monthly Roof Check	Area: - Maintenance East Campus High School 1st Floor Auditorium	AHU1234	Mechanic, Joe	Support, Que Centre Jan 26 2013 12:42AM	Support, Que Centre Jan 26 2013 12:42AM

Figure 5 Assigned to Me

Aged and Escalated Work Orders

The links for aged and escalated work orders are now located on the work orders drop down



Aged Work Orders

The Aged Work Orders tab displays a list of Aged Work Orders. The Aging period is defined by Que Centre Support Staff in the system settings. A Work Order will appear in this list if it remains in the system, not closed, for longer than the defined number of days

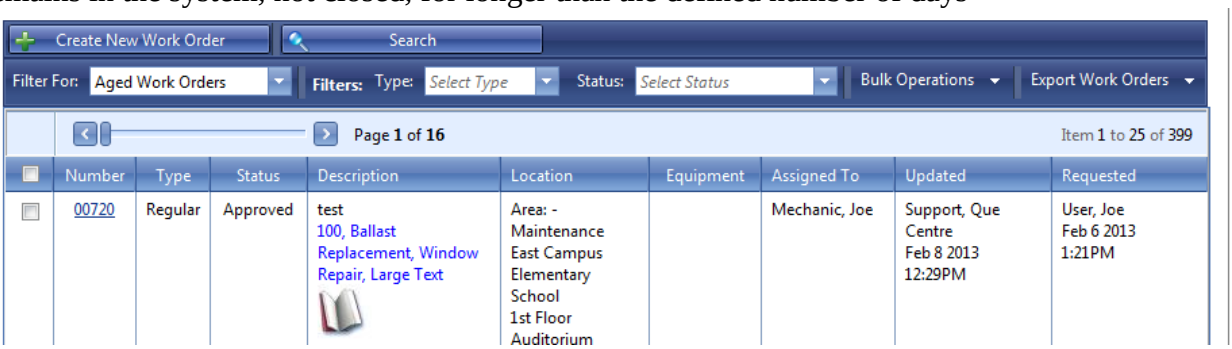


Figure 6 Aged Work Orders

Escalated Work Orders

The Escalated Work Orders tab displays a list of Escalated Work Orders. The Escalated period is defined by Que Centre Support Staff in system settings. A Work Order is Escalated if it remains in one status and was created more than the defined number of days.

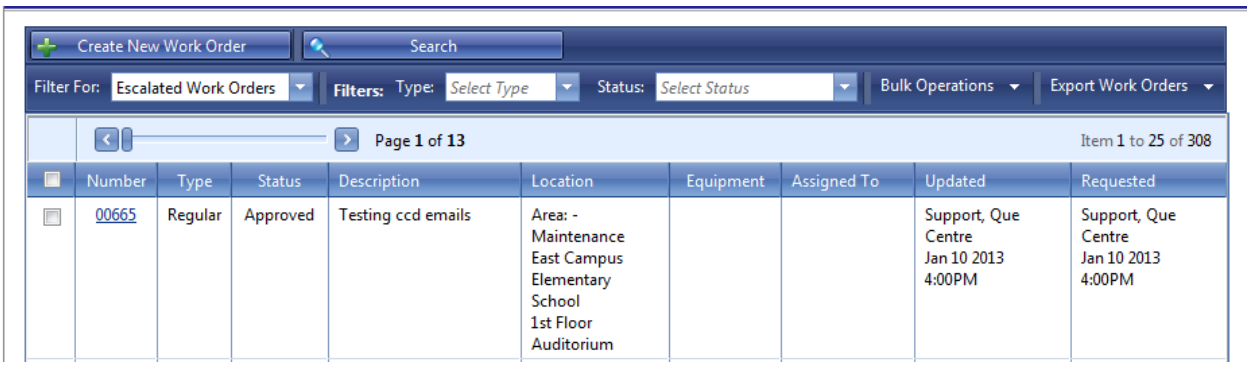


Figure 7 Escalated Work Orders

Find Work Orders

Find Work Orders allows you to search for Work Orders that match criteria you select. Once you make the selections and click on Apply Filters, a new window is opened with a list of Work Orders that meet the specifications you indicated. From there the Bulk Operations and Export options can be used if desired.

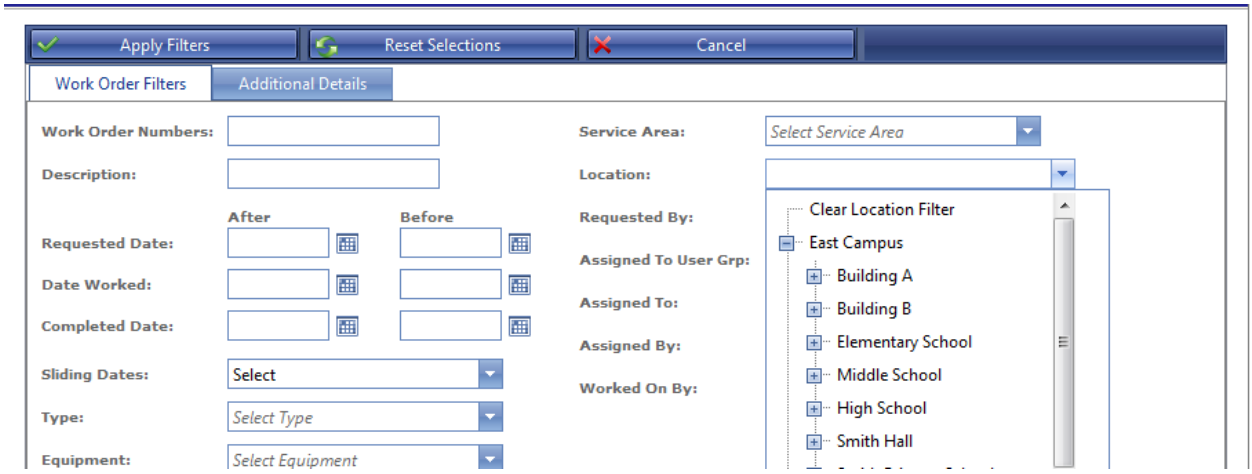
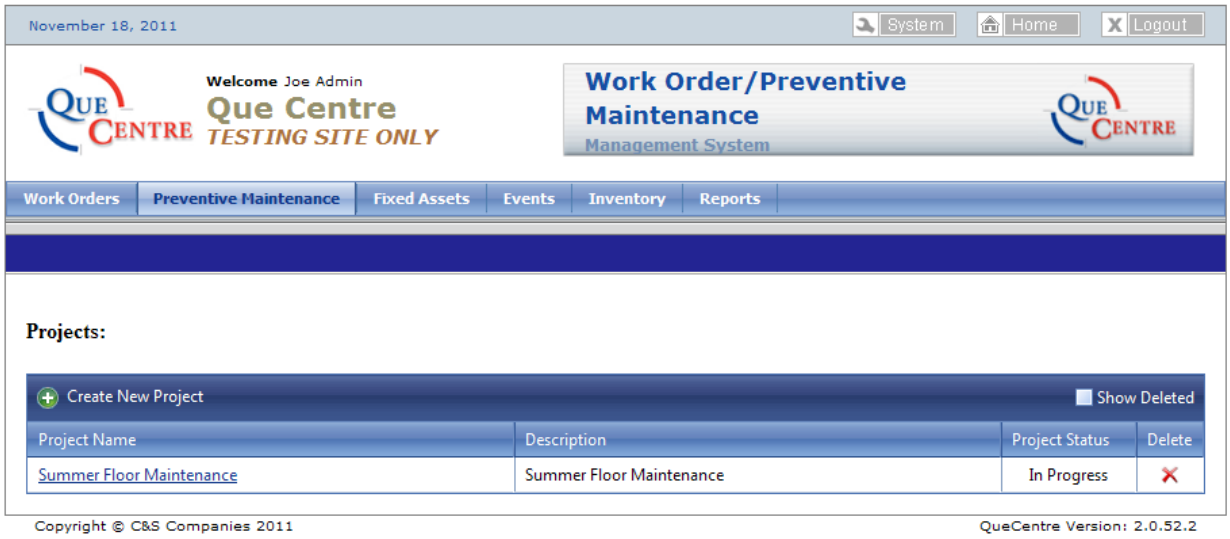


Figure 8 Find Work Order

Projects

Projects are related Work Orders that are grouped together.