

# Setting up a Work Order

Prior to setting up a Work Order, you need to be setup in the Address Book as a "Service Provider". If you are not, when you click "Add" to enter a Work Order, you will see the error below. If you receive this error, submit a ticket to the Helpdesk titled "Add me as a Service Provider".

**This form has 1 Errors 0 Warnings**

Issues (click each label for more information):

- [S/WM Service Provider Info Missing](#)

Please look for the highlighted fields, correct the entries, and resubmit your request.

If you are setup as a Service Provider, click on either the "Work with Work Orders" or "Work w/ Equipment Work Orders" programs on the Capital Asset Management Menu. Both work order setup programs are the same, they just have different layouts. Either can be used to setup a Work Order.

## Capital Asset Management Equipment Maintenance and Work Orders

Equipment Setup	Preventative Maintenance	Maintenance Work Orders
<ul style="list-style-type: none"><li>Equipment PM Schedules</li><li>PM Backlog</li><li>PM Update</li><li>Print PM Schedule</li><li>Print Equipment Maintenance Log</li><li>Post GL Costs to Work Orders</li><li>Maintenance Rules</li></ul>	<ul style="list-style-type: none"><li>Work with Work Orders</li><li>Work w/ Equipment Work Orders<ul style="list-style-type: none"><li>Print a Work Order</li></ul></li><li>Parent WO Inquiry</li><li>Work Order Pick List</li><li>WO - Inventory Issues</li><li>Work Order Parts List Inquiry</li><li>Equipment Parts List by Unit</li><li>Equipment Parts List Report</li><li>Equipment Backlog</li><li>Work Order Completion Report</li></ul>	

Click the Add ("+") button

### Work With Work Orders

✓ [Add] [Print] [Delete] [Form] [Row] [Tools] [One View]

**General** | People | Dates | Category Codes | Status | Order Definition

Unit Number: [ ]

Business Unit: [\* ]

Subsidiary: [\* ]

Parent W.O. No: [\* ]

Site Number: [\* ]

Inventory Number: [ ]

Serial Number: [\* ]

Unit Number: [\* ]

### Search for Equipment Work Orders

✓ [Add] [Print] [Delete] [Form] [Row] [Tools] [One View]

**Order Definition** | People | Dates | Category Codes

Unit Number: [ ]

Order Type: WM *Maintenance Work Order*

Type: [\* ]

Priority: [\* ]

Parent W.O. No: [\* ]

Business Unit: [\* ]

Lead Craft: [\* ]

Status: [05] [99]

Reference: [\* ]

Display Children  Include Models

## Setting up a Work Order

Enter the Work Order Type (1 = Maintenance Order for tracking maintenance on a piece of equipment, J = tracking a change order or specific work within a Job). Also enter the Unit Number of the piece of Equipment, and the Description/Failure Description. The Branch field will automatically populate with the Branch on the piece of equipment. The Description is free form. The Failure Description will populate with what is entered in the Description field, but it does not have to match exactly.

Records 1 - 9			Customize Grid
	Code	Description	Description 2
<input type="radio"/>	1	Maintenance Order	
<input type="radio"/>	6	Preventive Maintenance Order	
<input type="radio"/>	9	Mobilization/Demobilization	Transfer only; no repairs
<input type="radio"/>	J	Job Cost	
<input type="radio"/>	M	Model W.O. - Eq Mgmt	X Maintenance Model Order
<input type="radio"/>	S	Shop Order	
<input type="radio"/>	V	Inspections/Permits/License	
<input type="radio"/>	W	Warranty	

### Work Order Revisions

Order Number  WM Type 1 Maintenance Order

**Order Detail** Planning Classification Accounting Attachment

#### Equipment Master Information

Case Number

Unit Number

Branch \*

Inventory Item Number

Lot/SN  Quantity

Product Model

Product Family

Description

Failure Description

Enter the Customer information at the bottom of the Order Detail tab. When setting up an Equipment Work Order, the Customer Information is in a tab of its own, and the Order Detail information shown above is not a tab. All information is the same in both types of setup, it is just laid out differently.

### Customer Information

Requestor Reference

Customer Number

Site Number

Contact Number

Contact Name  Number

# Setting up a Work Order

Order Detail	Planning	Classification	Accounting	Attachment
<b>Status</b>				
Status	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Est. Hours	<input type="text"/>		Actual Hours	<input type="text"/>
Estimated Downtime Hours	<input type="text"/>		Actual Downtime Hours	<input type="text"/>
Requested Finish Date	<input type="text"/>	<input type="text"/>	Guaranteed Response Time	<input type="text" value=".00"/>
Planned Start Date	<input type="text"/>	<input type="text"/>		
Planned Finish Date	<input type="text"/>	<input type="text"/>		
Actual Finish Date	<input type="text"/>	<input type="text"/>		
Status Comment	<input type="text"/>		Percent Complete	<input type="text"/>
<b>Responsible Persons</b>				
Crew	<input type="text"/>			
Lead Craft	<input type="text"/>			
Assigned To	<input type="text"/>			
Inspector	<input type="text"/>			
Originator	<input type="text"/>			
Supervisor	<input type="text"/>			

Order Detail	Planning	Classification	Accounting	Attachment
<b>Category Codes</b>				
Category Code 1	<input type="text"/>	<input type="text"/>	Category 11	<input type="text"/>
Inspection	<input type="text"/>	<input type="text"/>	Category 12	<input type="text"/>
Inspection Cycle	<input type="text"/>	<input type="text"/>	Category 13	<input type="text"/>
PM Reason	<input type="text"/>	<input type="text"/>	Category 14	<input type="text"/>
Component Code	<input type="text"/>	<input type="text"/>	Category 15	<input type="text"/>
Failure Code	<input type="text"/>	<input type="text"/>	Category 16	<input type="text"/>
Billing Rate Table	<input type="text"/>	<input type="text"/>	Category 17	<input type="text"/>
Capitalized (Y/N)	<input type="text"/>	<i>WO Not Capitalized</i>	Category 18	<input type="text"/>
Category Code 9	<input type="text"/>	<input type="text"/>	Category 19	<input type="text"/>
Category 10	<input type="text"/>	<input type="text"/>	Category 20	<input type="text"/>
Priority	<input type="text" value="M"/>	<i>Med</i>	Language	<input type="text"/>
Approval Type	<input type="text"/>		Geographic Region	<input type="text"/>
W.O. Flash Message	<input type="text"/>		Time Zone	<input type="text" value="44"/> <i>Pacific Time (US &amp; Canada)</i>
Parent W.O. No	<input type="text"/>		Country	<input type="text"/> <i>Default Country</i>
Message No	<input type="text"/>		Type Bill of Material	<input type="text" value="M"/> <i>Standard Manufacturing Bill</i>
Reference	<input type="text"/>		Type of Routing	<input type="text" value="M"/> <i>Standard Manufacturing Routi</i>

# Setting up a Work Order

The screenshot shows the 'Accounting' tab of a software interface. It is divided into several sections:

- Estimated Cost of Work Order:** Fields for Est. Labor, Est. Material, Est. Other, and Est. Amount.
- Actual Cost of Work Order:** Fields for Actual Labor, Actual Material, Actual Other, and Actual Amount.
- Accounting:** Fields for Business Unit, Subsidiary, Subledger Inactive Code, Covered G/L Category, Non-Covered G/L Category, Tax Expl Code, Tax Rate/Area, Payment Instrument, and Pre-Payment Amount.
- Service Contract:** Field for Document Number.
- Method of Pricing:** Radio buttons for Flat Rate and Time and Materials (selected).
- Currency:** Fields for Currency Code, Exchange Rate, and To Currency Code, with a checked box for Foreign.

Costs get coded to a Work Order via the use of a Subledger in addition to the standard Business Unit.Object Account.Subsidiary account structure. The assigned Work Order number is expanded to 8 digits and the Subledger type is a "W" for Work Order. Using the Subledger will track the costs within the Work Order and also populate the "Actual Cost of Work Order" fields in the Accounting tab to allow for tracking of Estimates versus Actuals.

Entering it in the system would look like the screen shots below:

Order Number	22583	WM	Type	J	Job Cost
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Pay Type Description	Sat 8/1	Sun 8/2	Mon 8/3	Tue 8/4	Wed 8/5	Thu 8/6	Fri 8/7	Sub Type	Sub-ledger
Regular			8.00					W	00022583

  

Debit Amount	Credit Amount	Account Description	Subledger Type	Subledger	Subledger Description
10,000.00		Labor	W	00022583	REPAIR LILLY

The Business Unit and Subsidiary fields on the Accounting tab are for classification purposes only. These fields can be used to search for Work Orders on a Business Unit or within a Subsidiary. They can also be used to bill a Work Order to another Job internally. In this process, the Work Order Business Unit and Subsidiary are completed with the Job Number and account to bill the Work Order to, and the Service Billing process is used to actually bill the Work Order costs internally. (Contact the I/S Helpdesk or a Business Analyst for more information on using Service Billing.)

When a Work Order is complete, the status can be changed to "99 – Closed" manually as shown above. When the Work Order is closed, the Subledger is made inactive so the Work Order can no longer be charged to.