

Close Your Finished Service Orders When the Work is Complete

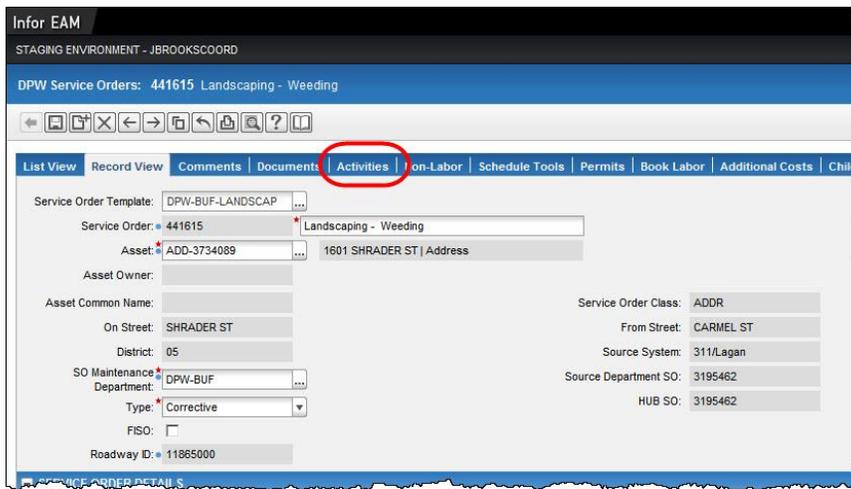
This is for "Regular" Service Orders, not for PM (Preventative Maintenance) SO's

We will work on 4 different tabs. First we'll use the Activities tab.

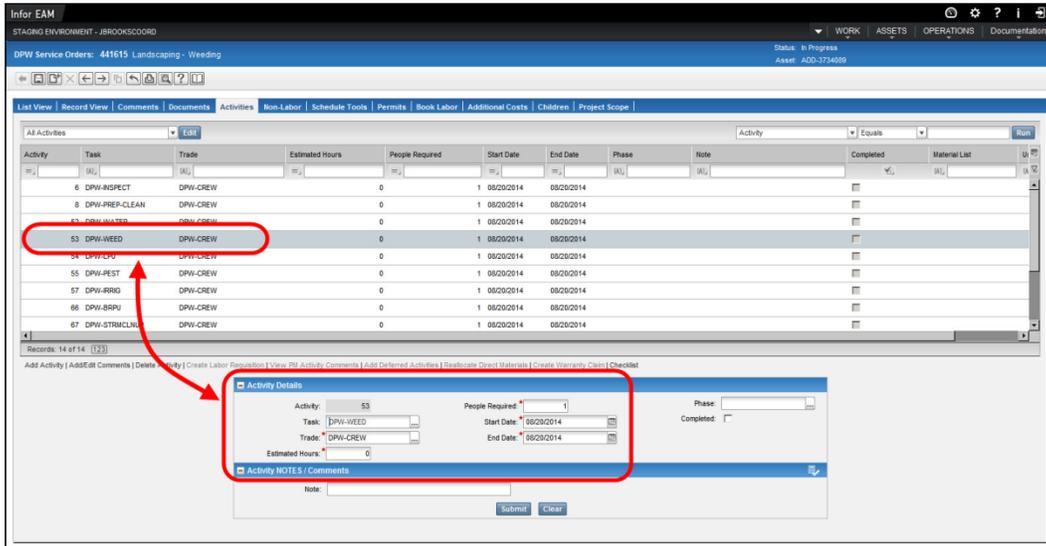
The Activities tab

We're going to select an Activity to enter information about.

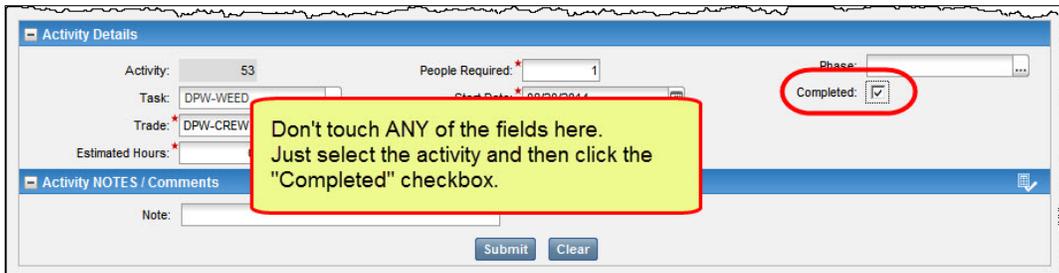
1. Find the Service Order you want to close and open the record. (Tip: it's probably in your CMMS inbox called "DPW Daily Sheet (Assigned to Me)".)
2. Click on the Activities tab to open it.



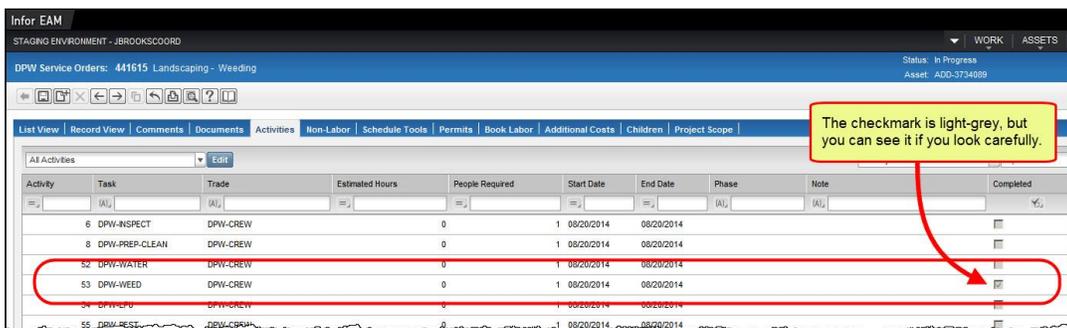
- We want to indicate which Activities were completed. The list shows many possibilities. Find the Activity in question and click on it to highlight that line.



- Notice that when the line is highlighted, the details show in the box at the bottom of the screen. IGNORE ALL THE FIELDS. The only thing you do here is check the "Completed" box and then click the Submit button.



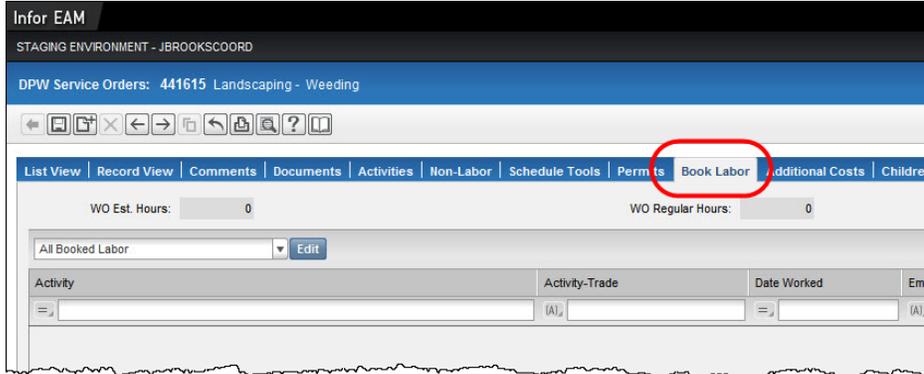
- Result: the list of Activities shows a checked box. It's faint grey but it's there. We will now use other tabs to enter information about this Activity.



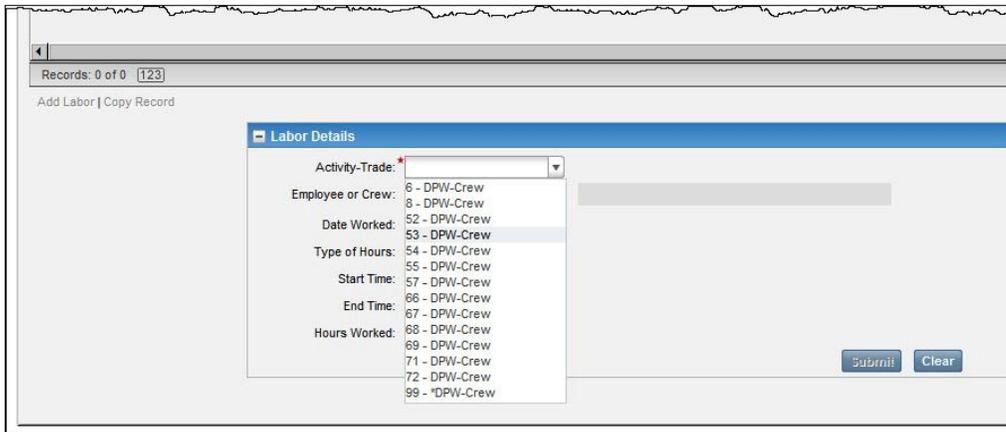
The Book Labor tab

We are going to enter data about how long the crew took to do this Activity.

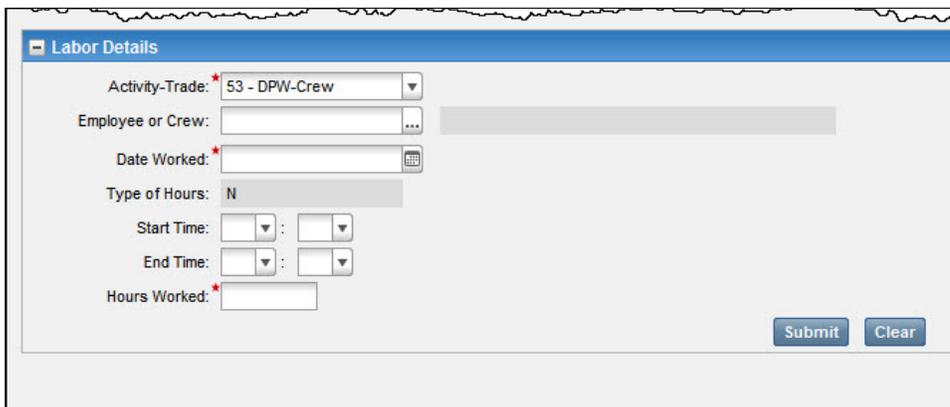
1. Click on the Book Labor tab to open it.



2. In the box at the bottom of the screen, click on the Activity-Trade drop-down list to select the same Activity as we just marked as "Complete" on the Activities tab.



Result of selection:



- Now we need to list the crew (for BUF, this is the truck). We'll use the search button (the Lookup tool) to find it.

WARNING! Don't just click the search button. The list is really long. Instead, type BUF into the field and then click the search button.

Labor Details

Activity-Trade: * 53 - DPW-Crew

Employee or Crew: BUF

Date Worked: [Calendar Icon]

Type of Hours: N

Start Time: [Time Selector] : [Time Selector]

End Time: [Time Selector] : [Time Selector]

Hours Worked: *

Submit Clear

Result of click: the “pre-searched” displays.

Infor EAM

STAGING ENVIRONMENT - JBROOKSCOORD

DPW Service Orders: 441615 Landscaping - Weeding

Status: In Progress Asset: ADD-3714059

Employees

Select a record and click OK:

Employee	Name	Trade	Department	Class	Class Org.
DPW-BUF-0001	DPW-BUF Bucket Truck 0001	*	DPW-BUF		
DPW-BUF-0003	DPW-BUF Bucket Truck 0003	*	DPW-BUF		
DPW-BUF-403	DPW-BUF Ranger Truck 403	*	DPW-BUF		
DPW-BUF-417	DPW-BUF Single Cabr Utility Bed Truck 417	*	DPW-BUF		
DPW-BUF-418	DPW-BUF Ranger Truck 418	*	DPW-BUF		
DPW-BUF-431-650	DPW-BUF Utility Bed Truck 431-650	*	DPW-BUF		
DPW-BUF-431-680	DPW-BUF Utility Bed Truck 431-680	*	DPW-BUF		
DPW-BUF-506	DPW-BUF Single Cabr Utility Bed Truck 506	*	DPW-BUF		
DPW-BUF-512	DPW-BUF Single Cabr Utility Bed Truck 512	*	DPW-BUF		
DPW-BUF-523	DPW-BUF Single Cabr Utility Bed Truck 523	*	DPW-BUF		
DPW-BUF-525	DPW-BUF Single Cabr Utility Bed Truck 525	*	DPW-BUF		
DPW-BUF-604	DPW-BUF Mini Dump Truck 604	*	DPW-BUF		

OK Cancel

Submit Clear

Labor Details

Activity-Trade: * 53 - DPW-Crew

Employee or Crew: BUF

Date Worked: [Calendar Icon]

Type of Hours: N

Start Time: [Time Selector] : [Time Selector]

End Time: [Time Selector] : [Time Selector]

Hours Worked: *

4. Here is the close-up of the truck list. Find the correct truck and double-click to choose it. (Or highlight it and then click the OK button.)

Employees
Select a record and click OK.

(default) Edit Employee Contains BUF Run

Employee	Name	Trade	Department	Class	Class Org.
DPW-BUF-0001	DPW-BUF Bucket Truck 0001	*	DPW-BUF		
DPW-BUF-0003	DPW-BUF Bucket Truck 0003	*	DPW-BUF		
DPW-BUF-403	DPW-BUF Ranger Truck 403	*	DPW-BUF		
DPW-BUF-417	DPW-BUF Single Cab/ Utility Bed Truck 417	*	DPW-BUF		
DPW-BUF-418	DPW-BUF Ranger Truck 418	*	DPW-BUF		
DPW-BUF-431-650	DPW-BUF Utility Bed Truck 431-650	*	DPW-BUF		
DPW-BUF-431-680	DPW-BUF Utility Bed Truck 431-680	*	DPW-BUF		
DPW-BUF-506	DPW-BUF Single Cab/ Utility Bed Truck 506	*	DPW-BUF		
DPW-BUF-512	DPW-BUF Single Cab/ Utility Bed Truck 512	*	DPW-BUF		
DPW-BUF-523	DPW-BUF Single Cab/ Utility Bed Truck 523	*	DPW-BUF		
DPW-BUF-525	DPW-BUF Single Cab/ Utility Bed Truck 525	*	DPW-BUF		
DPW-BUF-604	DPW-BUF Mini Dump Truck 604	*	DPW-BUF		

OK Cancel

Result of choosing the truck shows below. Next we will enter the Date Worked.

Labor Details

Activity-Trade: * 53 - DPW-Crew

Employee or Crew: DPW-BUF-512 DPW-BUF Single Cab/ Utility Bed Truck 512

Date Worked: *

Type of Hours: N

Start Time: :

End Time: :

Hours Worked: *

Submit Clear

5. To enter the date the work was done, click the Calendar icon to see the drop-down calendar.

Labor Details

Activity-Trade: * 53 - DPW-Crew

Employee or Crew: DPW-BUF-512 DPW-BUF Single Cab/ Utility Bed Truck 512

Date Worked: * 

Type of Hours: N

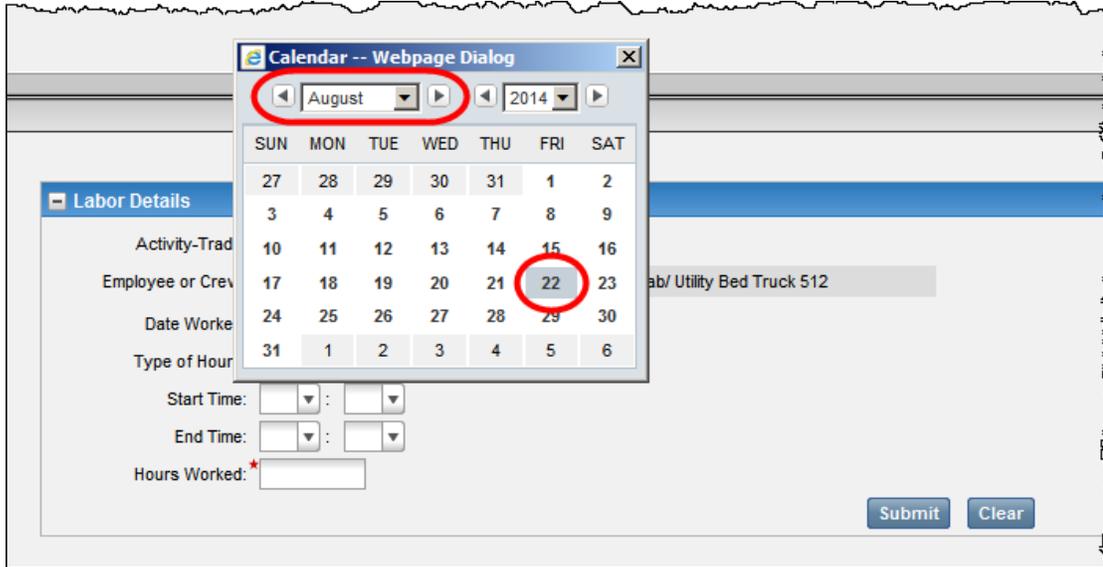
Start Time: :

End Time: :

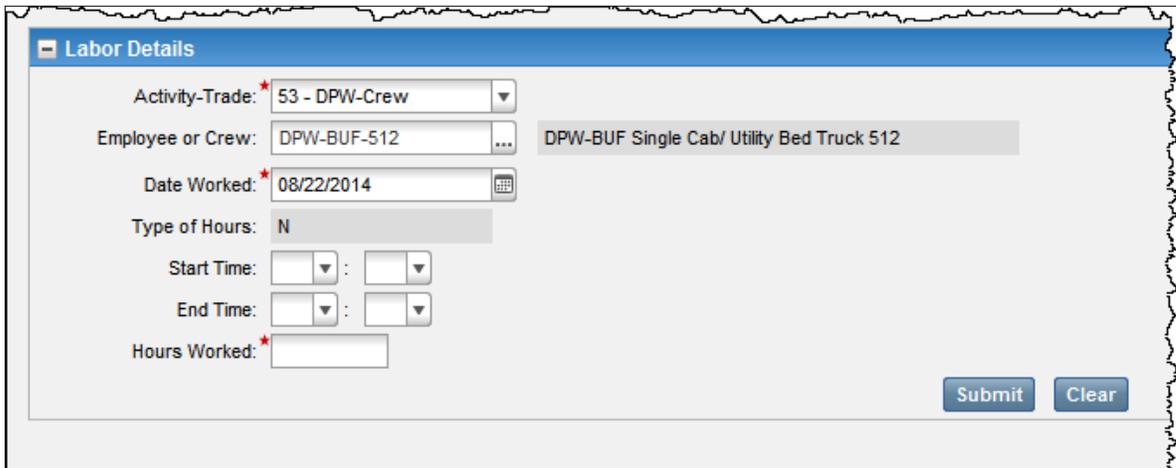
Hours Worked: *

Submit Clear

6. Use the arrows or drop-down list to change the month. Click on the date to select it. (Be careful not to enter the current date unless the work was done the same day you're doing the CMMS data entry)



Result of selecting the date shows below.



- The next field is grayed out – you can't change it. Skip ahead to "Start Time" so we can show how long the crew was on-site. Use the drop-down list to select the hours and minute. First enter the Start Time...

The screenshot shows the 'Labor Details' form with the following fields:

- Activity-Trade: 53 - DPW-Crew
- Employee or Crew: DPW-BUF-512
- Date Worked: 08/22/2014
- Type of Hours: N
- Start Time: 08 : 00 (highlighted with a red circle)
- End Time: 08 : 00
- Hours Worked: 0

Buttons: Submit, Clear

...and then enter EITHER the End Time OR Hours Worked, and then click the "Submit" button.

The screenshot shows the 'Labor Details' form with the following fields:

- Activity-Trade: 53 - DPW-Crew
- Employee or Crew: DPW-BUF-512
- Date Worked: 08/22/2014
- Type of Hours: N
- Start Time: 08 : 00
- End Time: 10 : 00 (highlighted with a red circle)
- Hours Worked: 2 (highlighted with a red circle)

A yellow callout box with a red border points to the End Time and Hours Worked fields, containing the text: "Your choice: enter EITHER End Time or Hours Worked."

Buttons: Submit, Clear

Result: The data you've just entered will show in a line in the top part of the screen and the details box in the bottom part of the screen will be empty again.

The screenshot shows the Infor EAM interface with a table of labor records and a 'Labor Details' pop-up window.

Table of Labor Records:

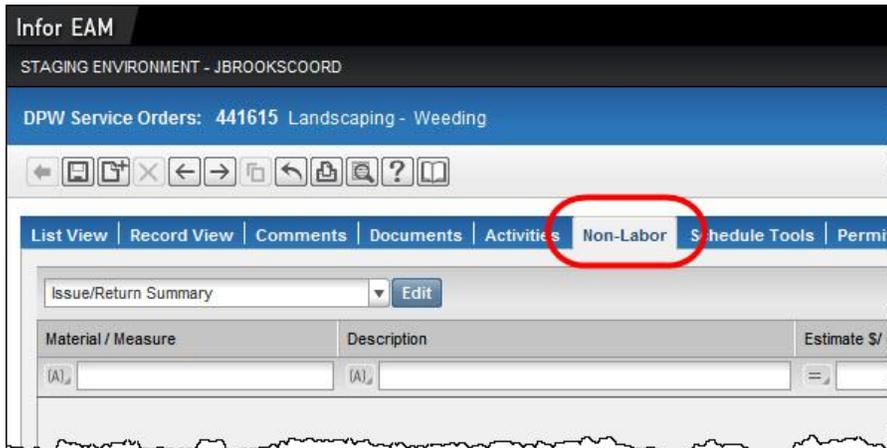
Activity	Activity-Trade	Date Worked	Employee	Name	Trade	Hours Worked	End Time
53	53 - DPW-Crew	08/22/2014	DPW-BUF-512	DPW-BUF Single Cab/ Utility Bed Truck 512		2	10:00

Buttons: Submit, Clear

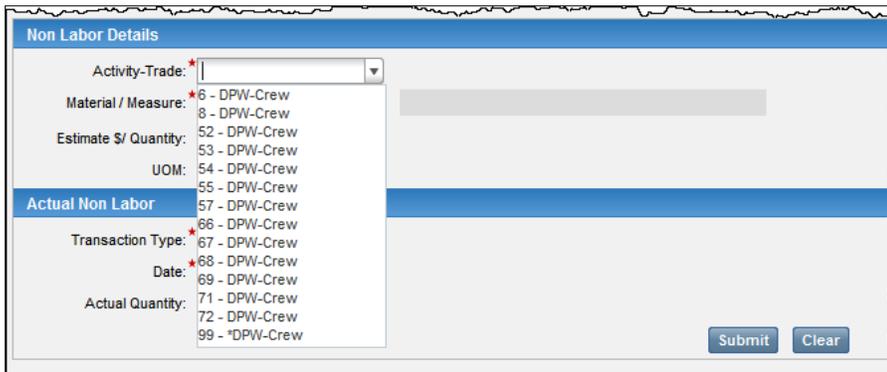
The Non-Labor tab

We are going to enter data about what measurable things the crew accomplished. For example, if the Activity is Mowing, we'll use this tab to show what percentage of the area was mowed.

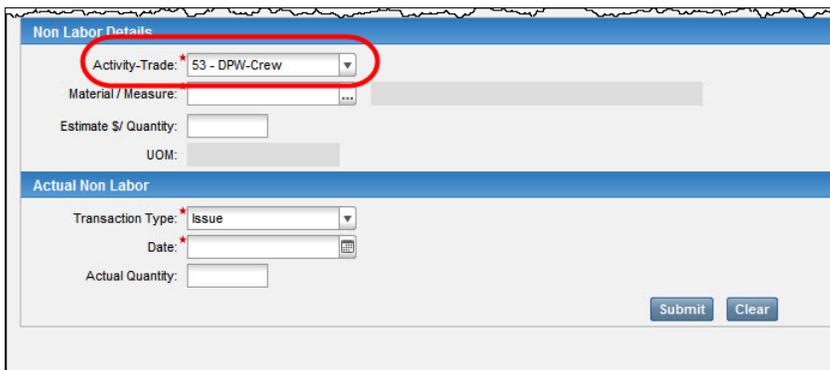
1. Click on the Non-Labor tab to open it.



2. In the box at the bottom of the screen, click on the Activity-Trade drop-down list to select the same Activity as we marked as "Complete" on the Activities tab.



Result of selection:



- Now we need to list the Measure. This means “what work got accomplished that we can measure”. For example, street crews will count potholes filled, while mowing crews will list percentage of mowing complete. We’ll use the search button (the Lookup Tool) to find the correct Measure.

WARNING! Don’t just click the search button. The list is really long. Instead, put in part of the code and then click the search button.

Non Labor Details

Activity-Trade: 53 - DPW-Crew

Material / Measure: WEED

Estimate \$/ Quantity:

UOM:

Actual Non Labor

Transaction Type: Issue

Date:

Actual Quantity:

Submit Clear

- The pre-searched list has only 1 result. Double-click on it (or click the OK button) to select it.

Parts

Select a record and click OK.

(default) Edit Part Contains WE Run

Part	Description	Store	Store Qty.
WEEDING	Weeding (SQFT)	DPW-STORE	0

OK Cancel

Result of choosing the Measure shows below. Next we will enter the Date.

Non Labor Details

Activity-Trade: 53 - DPW-Crew

Material / Measure: WEEDING Weeding (SQFT)

Estimate \$/ Quantity:

UOM: SQFT

Actual Non Labor

Transaction Type: Issue

Date:

Actual Quantity:

Submit Clear

- Skip the next 3 fields (Estimate, UOM, Transaction Type) and jump down to the Date field. Click the Calendar icon to see the drop-down calendar.

Non Labor Details

Activity-Trade: * 53 - DPW-Crew

Material / Measure: * WEEDING Weeding (SQFT)

Estimate \$/ Quantity:

UOM: SQFT

Actual Non Labor

Transaction Type: * Issue

Date: * 

Actual Quantity:

- Use the arrows or drop-down list to change the month. Click on the date to select it. (Be careful not to enter the current date unless the work was done the same day you're doing the CMMS data entry)
- Click the OK button. (Note that the double-click doesn't work for THIS calendar. You must use the OK button instead.)

Non Labor Details

Activity-Trade: * 53 - DPW-Crew

Material / Measure: * WEEDING Weeding (SQFT)

Estimate \$/ Quantity:

UOM: SQFT

Actual Non Labor

Transaction Type: * Issue

Date: * 

Actual Quantity:

Calendar -- Webpage Dialog

August 2014

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Hour: Minute:

8. In the next line, enter the ACTUAL QUANTITY. (This is usually 1 for Arborists.)

The screenshot shows a web form titled "Non Labor Details". It is divided into two sections: "Non Labor Details" and "Actual Non Labor".

Non Labor Details Section:

- Activity-Trade: * 53 - DPW-Crew
- Material / Measure: * WEEDING Weeding (SQFT)
- Estimate \$/ Quantity: []
- UOM: SQFT

Actual Non Labor Section:

- Transaction Type: * Issue
- Date: * 08/22/2014 11:53
- Actual Quantity: [200]

Buttons: Submit, Clear

9. Click the Submit button.

This screenshot is identical to the previous one, but the "Submit" button in the bottom right corner is circled in red.

Result: The data you've just entered will show in a line in the top part of the screen and the details box in the bottom part of the screen will be empty again.

The screenshot shows the Infor EAM interface. At the top, it displays "PRODUCTION ENVIRONMENT - JBROOKSCORD" and "DPW Service Orders: 448202 Landscaping - Shrubbery blocking visibility".

Below the header is a navigation bar with tabs: "List View", "Record View", "Comments", "Documents", "Activities", "Non Labor", "Schedule Tools", "Permits", "Book Labor", "Additional Costs", "Children", "Project Scope".

The main area contains a table with the following data:

Material / Measure	Description	Estimate \$/ Quantity	Used	UOM	Activity-Trade
WD	% of Weeding		0	P1	72-DPW-Crew

Below the table is a "Non Labor Details" form, which is currently empty, matching the state in step 9.

Back to the Record View tab

Just 3 more changes

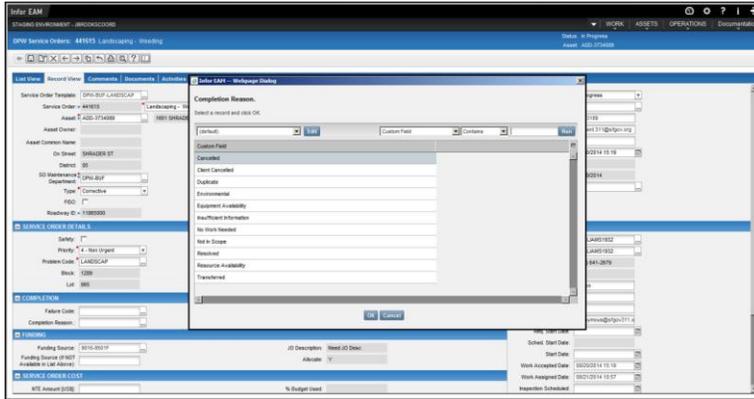
1. We need to enter the "Completion Reason" for this Service Order. See the close-up view in the next screenshot.

The screenshot shows the 'iHfor EAM' interface for a Service Order. The 'Record View' tab is active. The 'COMPLETION' section is expanded, and the 'Completion Reason' field is circled in red. Other fields in the 'COMPLETION' section include 'Failure Code', 'Action Code', and 'Transfer To Department'. The 'SERVICE ORDER DETAILS' section shows 'Priority: 4 - Non Urgent' and 'Problem Code: LANDSCAP'. The 'FUNDING' section shows 'Funding Source: 9016-9501F'. The 'SERVICE ORDER COST' section shows 'NTE Amount [US\$]' and '% Budget Used'.

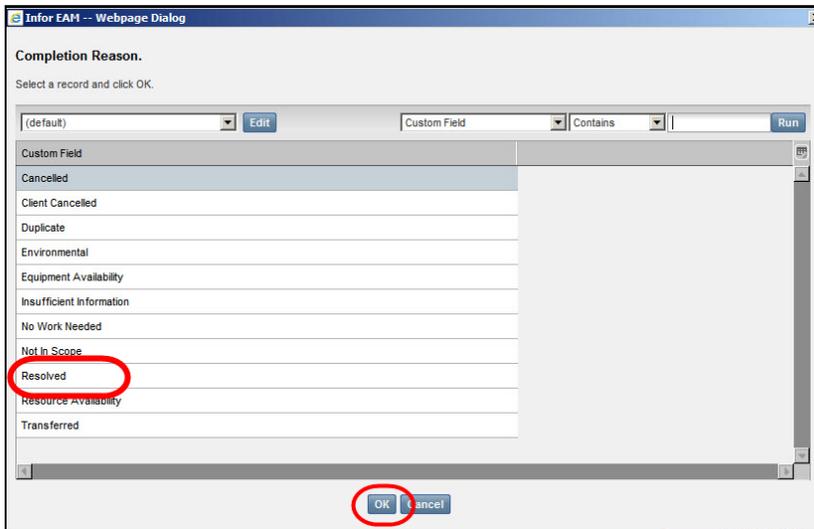
2. Click the Search button to select the Completion Reason.

This is a close-up view of the 'COMPLETION' section of the Service Order form. The 'Completion Reason' field is circled in red, and the search button (three dots) is also circled in red. Other fields in the 'COMPLETION' section include 'Failure Code', 'Action Code', and 'Transfer To Department'. The 'SERVICE ORDER DETAILS' section shows 'Priority: 4 - Non Urgent' and 'Problem Code: LANDSCAP'. The 'FUNDING' section shows 'Funding Source: 9016-9501F'. The 'SERVICE ORDER COST' section shows 'NTE Amount [US\$]' and '% Budget Used'.

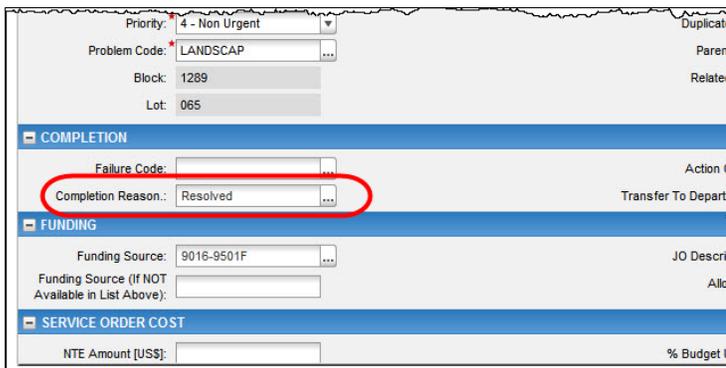
- Result of click. The list of Completion Reasons displays. Most of the reasons listed are for jobs that cannot be finished. For every job that IS finished, choose "Resolved" and then click the OK button.



- Here is the close-up of the list. Select "Resolved" and double-click to choose it. (Or highlight it and then click the OK button.)



Result of choosing the Completion Reason shows below.



- Sometimes, the Service Order is for a request that actually turns out to be an emergency. (This is not common, but it happens. An example would be if an Arborist is called out to prune a tree but what they find is actually a large broken branch that is threatening to fall on pedestrians.) IF THIS HAPPENS, change the Priority from “4 - Non-Urgent” to “2 - Emergency”.

The screenshot shows a web-based form for a service order. The title bar reads "DPW Service Orders: 441615 Landscaping - Weeding". Below the title bar is a navigation menu with options: List View, Record View, Comments, Documents, Activities, Non-Labor, Schedule Tools, and Permissions. The form fields include: Service Order Template (DPW-BUF-LANDSCAP), Service Order (441615), Asset (ADD-3734089), Asset Owner, Asset Common Name, On Street (SHRADER ST), District (05), SO Maintenance Department (DPW-BUF), Type (Corrective), FISO, and Roadway ID (11865000). A section titled "SERVICE ORDER DETAILS" contains a Priority dropdown menu, which is highlighted with a red circle. The dropdown menu is open, showing options: 1 - Official Priority, 2 - Emergency, 3 - Urgent, 4 - Non Urgent, and Default work order priority. Below this is a "COMPLETION" section with Failure Code and Completion Reason fields.

- Finally, set the Status to “Work Completed” and save the change.

The screenshot shows a web-based form for a service order. The top navigation bar includes WORK, ASSETS, OPERATIONS, and Documentation. The status is "In Progress" and the asset is "ADD-3734089". A dropdown menu for "Status" is highlighted with a red circle, showing the option "Work Completed". Below the status dropdown are fields for Reported By (311), Requested By Phone (701.3189), Requested By Email (content.311@sfgov.org), Requester's Department (311), Date Reported (08/20/2014 15:19), and Created By (HUB).

- If this Service Order involved any more Activities, follow all these steps for each Activity. When you have done all the activities, you're done with this Service Order.

You're done with this one! Go on to the next Service Order you need to close out.