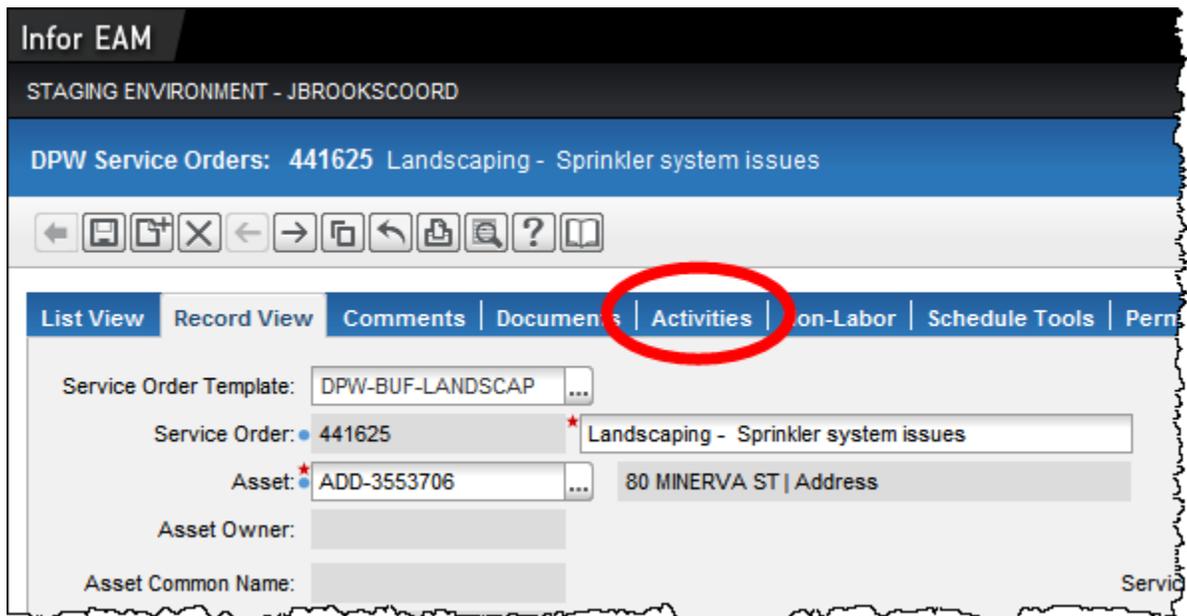


How to Add an Activity to an Existing Service Order

Sometimes, you'll work on a Service Order where the list of Activities does not include the Activity you need to book time to. This might happen because a routine job needs a specific unrelated task done; or because the Service Order was created with an older version of a template. When this happens, you'll need to add the Activity to the Service Order manually.

In this case, we're taking a general-purpose Landscaping Service Order and adding the activity of Adjust Tree Brace. These are the steps to follow:

1. Open the Activities tab



- Use the Activity Details box at the bottom of screen. We need to fill in every field that has a red star, plus also the Task field.

The screenshot shows the Infor EAM interface. At the top, it displays 'DPW Service Orders: 441625 Landscaping - Sprinkler system issues'. Below this is a table of activities. The 'Activity Details' box is expanded, showing the following fields:

- Activity: 102
- Task: [Empty]
- Trade: [Empty]
- Estimated Hours: 0
- People Required: 1
- Start Date: [Empty]
- End Date: [Empty]
- Phase: NONE
- Completed: [Unchecked]
- Note: [Empty]

Close-up of Activity Details box:

This close-up view highlights the fields that require input, indicated by red stars:

- Activity: 102
- Task: [Empty]
- Trade: [Empty]
- Estimated Hours: 0
- People Required: 1
- Start Date: [Empty]
- End Date: [Empty]
- Phase: NONE
- Completed: [Unchecked]
- Note: [Empty]

- The Activity field will have a random number in it. Erase whatever is there, and then enter the correct Activity Number. (Use the list on the Crew Sheet to find the right number.)

This close-up view shows the 'Activity' field updated with the correct number:

- Activity: 64
- Task: [Empty]
- Trade: [Empty]
- Estimated Hours: 0
- People Required: 1
- Start Date: [Empty]
- End Date: [Empty]
- Phase: NONE
- Completed: [Unchecked]
- Note: [Empty]

4. Put in the correct Task. It's a longish list, so make your life easier by putting part of the code into the Task field first, and then clicking the search button.

Activity Details

Activity: 64 People Required: 1 Phase: NONE

Task: ADJ Start Date: End Date: Completed:

Trade: Estimated Hours: 0

Activity NOTES / Comments

Note:

Submit Clear

Result of clicking search button.

Infor EAM -- Webpage Dialog

Tasks

Select a record and click OK.

Task: Contains: ADJ Run

Task	Description	Class	Revision
DPW-ADJTB	DPW-Adjust Tree Brace		0
DPW-BKFADJ	DPW-Backfill/ Adjust		0

5. Here is a close-up of the Search Results box. Double-click on the correct choice (or click once to select and then click the "OK" button) to enter it into the Task field.

Infor EAM -- Webpage Dialog

Tasks

Select a record and click OK.

(default) Edit Task Contains ADJ Run

Task	Description	Class	Revision
DPW-ADJTB	DPW-Adjust Tree Brace		0
DPW-BKFADJ	DPW-Backfill/ Adjust		0

6. Put in the correct Trade. It should either *DPW-CREW or DPW-CREW (no asterisk). The choice depends on how this particular Service Order is being charged. If this is xxxxx, then use the asterisk. But if it is zzzzz, then use the plain version.

The screenshot shows the 'Activity Details' section of a software interface. The 'Trade' dropdown menu is highlighted with a red circle and contains the text '*DPW-CREW'. Other fields include 'Activity' (64), 'Task' (DPW-ADJTB), 'People Required' (1), 'Estimated Hours' (0), 'Start Date', 'End Date', 'Phase' (NONE), and 'Completed' (checkbox). Below this is the 'Activity NOTES / Comments' section with a 'Note' text area and 'Submit' and 'Clear' buttons.

7. The next two fields have default values in them. Leave them there. (Leave "Estimated Hours" at 0 and "People Required" at 1.)

The screenshot shows the 'Activity Details' section. The 'Estimated Hours' field (0) and the 'People Required' field (1) are highlighted with red circles. Other fields include 'Activity' (64), 'Task' (DPW-ADJTB), 'Trade' (DPW-CREW), 'Start Date', 'End Date', 'Phase' (NONE), and 'Completed' (checkbox). Below is the 'Activity NOTES / Comments' section with a 'Note' text area and 'Submit' and 'Clear' buttons.

8. Put in the Start Date and End Date. Just copy what the other lines have. Type in directly (careful of format) or use the calendar drop-down.

The screenshot shows the 'Activity Details' section. The 'Start Date' field (08/20/2014) and the 'End Date' field (11/20/2014) are highlighted with a red circle. Other fields include 'Activity' (64), 'Task' (DPW-ADJTB), 'Trade' (DPW-CREW), 'People Required' (1), 'Estimated Hours' (0), 'Phase' (NONE), and 'Completed' (checkbox). Below is the 'Activity NOTES / Comments' section with a 'Note' text area and 'Submit' and 'Clear' buttons.

- Click the "Submit" button. The information you've just entered will show up in a line in the top part of the screen, and the Activity Details box will be cleared out.

Activity Details

Activity: 64 People Required: 1 Phase: NONE

Task: DPW-ADJTB Start Date: 08/20/2014 Completed:

Trade: DPW-CREW End Date: 11/20/2014

Estimated Hours: 0

Activity NOTES / Comments

Note:

Submit **Clear**

Result: The newly-added Activity is listed on the Activities tab.

Infor EAM
STAGING ENVIRONMENT - JEBROOKSCoord

DPW Service Orders: 441625 Landscaping - Sprinkler system issues Status: In Progress Asset: ACC-3553706

Activities | Non-Labor | Schedule Tools | Permits | Book Labor | Additional Costs | Children | Project Scope

Activity	Task	Trade	Estimated Hours	People Required	Start Date	End Date	Phase	Note	Completed	Material List
6	DPW-INSPECT	DPW-CREW	0	1	08/20/2014	11/20/2014			<input type="checkbox"/>	
8	DPW-PRP-CLEAN	DPW-CREW	0	1	08/20/2014	11/20/2014			<input type="checkbox"/>	
52	DPW-WATER	DPW-CREW	0	1	08/20/2014	11/20/2014			<input type="checkbox"/>	
53	DPW-WEED	DPW-CREW	0	1	08/20/2014	11/20/2014			<input type="checkbox"/>	
54	DPW-LPU	DPW-CREW	0	1	08/20/2014	11/20/2014			<input type="checkbox"/>	
55	DPW-PEST	DPW-CREW	0	1	08/20/2014	11/20/2014			<input type="checkbox"/>	
57	DPW-IRRG	DPW-CREW	0	1	08/20/2014	11/20/2014			<input type="checkbox"/>	
64	DPW-ADJTB	DPW-CREW	0	1	08/20/2014	11/20/2014	NONE		<input type="checkbox"/>	
68	DPW-BRPV	DPW-CREW	0	1	08/20/2014	11/20/2014			<input type="checkbox"/>	

Records: 15 of 15 (1/2)

Activity Details

Activity: 64 People Required: 1 Phase: NONE

Task: Start Date: Completed:

Trade: End Date:

Estimated Hours: 0

Activity NOTES / Comments

Note:

Submit **Clear**

10. The newly-added Activity is now available in the drop-down lists on the Book Labor and Non-Labor tabs.

The screenshot shows the 'Book Labor' tab in the Infor EAM interface. The main table displays labor records with columns for Activity, Activity-Trade, Date Worked, Employee, Name, Trade, Hours Worked, and End Time. A 'Labor Details' dropdown menu is open, showing a list of activity options. The option '64 - DPW-Crew' is highlighted with a red circle.

Activity	Activity-Trade	Date Worked	Employee	Name	Trade	Hours Worked	End Time
	8 - DPW-Crew	09/16/2014	AANDERSON	Adrienne Anderson	REDTENANT	2	11:00
	8 - DPW-Crew	09/15/2014	AANDERSON	Adrienne Anderson	REDTENANT	2	11:00
	8 - DPW-Crew	09/15/2014	AANDERSON	Adrienne Anderson	REDTENANT	-2	

Records: 3 of 3 [23]

Activity-Trade: 6 - DPW-Crew
 Employee or Crew: 8 - DPW-Crew
 Date Worked: 52 - DPW-Crew
 Type of Hours: 53 - DPW-Crew
 Start Time: 54 - DPW-Crew
 End Time: 55 - DPW-Crew
 Hours Worked: 64 - DPW-Crew
 Transaction Type: 65 - DPW-Crew
 Date: 67 - DPW-Crew
 Actual Quantity: 68 - DPW-Crew
 Date: 69 - DPW-Crew
 Actual Quantity: 71 - DPW-Crew
 Date: 72 - DPW-Crew

The screenshot shows the 'Non-Labor' tab in the Infor EAM interface. The main table displays material/measure records with columns for Material / Measure, Description, Estimate \$/ Quantity, Used, UOM, and Activity-Trade. A 'Non Labor Details' dropdown menu is open, showing a list of activity options. The option '64 - DPW-Crew' is highlighted with a red circle.

Material / Measure	Description	Estimate \$/ Quantity	Used	UOM	Activity-Trade

Records: 0 of 0 [23]

Activity-Trade: 6 - DPW-Crew
 Material / Measure: 8 - DPW-Crew
 Estimate \$/ Quantity: 52 - DPW-Crew
 UOM: 53 - DPW-Crew
 Actual Non Labor: 54 - DPW-Crew
 Transaction Type: 55 - DPW-Crew
 Date: 67 - DPW-Crew
 Actual Quantity: 68 - DPW-Crew
 Date: 69 - DPW-Crew
 Actual Quantity: 71 - DPW-Crew
 Date: 72 - DPW-Crew