

## Fleet Training Guide

<b>Table of Contents</b>	
General Program and Database Organization	2
Fleet Category Data	3
Preventive Maintenance Items	5
Equipment	10
Specs: Preventive Maintenance Items	16
Specs: Required Parts and Notes	18
Parts Inventory	19
Adding / Returning / Transferring your Parts Inventory	21
Part Kits	22
Shop Tasks	24
Service Groups	26
Fleet Work Orders	28
Adding Work Orders	30
Work Orders: Special Considerations	32
Work Order Status	34
Creating a PM Schedule	35
Equipment Rate Calculator	36
Fuel and Odometer Log	37
Fleet Program Settings	40
Fleet Maintenance Reports	41
Fleet Listing Reports	42
Index	43

## General program and database organization

**PubWorks** Fleet is designed to record information about the work performed to maintain your vehicle and equipment fleet. Recording this maintenance information will give you the power to analyze costs and maintenance records in a wide variety of ways.

In **PubWorks** Fleet, a *Work Order* is the record of work performed on single piece of equipment. The Work Order can involve multiple employees and/or contractors and can involve the use of multiple parts and shop maintenance tasks.

**PubWorks**, in essence a cost accounting system, is very much concerned with the cost of maintenance performed. The cost of any Work Order is the sum of the cost of employee labor, contractor services and the cost of parts used and recorded on the Work Order.

As Work Orders are recorded in the **PubWorks** database, a wealth of data is accumulated describing your fleet maintenance operation. **PubWorks** has been designed to be extremely flexible, consistent and easy-to-use – thus expediting the data entry process and helping to assure that entered data is accurate and reliable.

### Database Hierarchy

Work Orders represent the top level of the **PubWorks** database hierarchy.

Data entities that contribute to Work Orders (employees, contractors, equipment, parts and tasks) represent the middle tier of the database.

The bottom tier of the database hierarchy consists of “category” data (priority, repair reason, maintenance category, vehicle component, part/material types, etc.). Category data is used to help assign user-defined, standard attributes to data of the middle tier. Making use of standard category data items provides for a high degree of flexibility, better data organization and enhanced reporting power.

### Conclusion

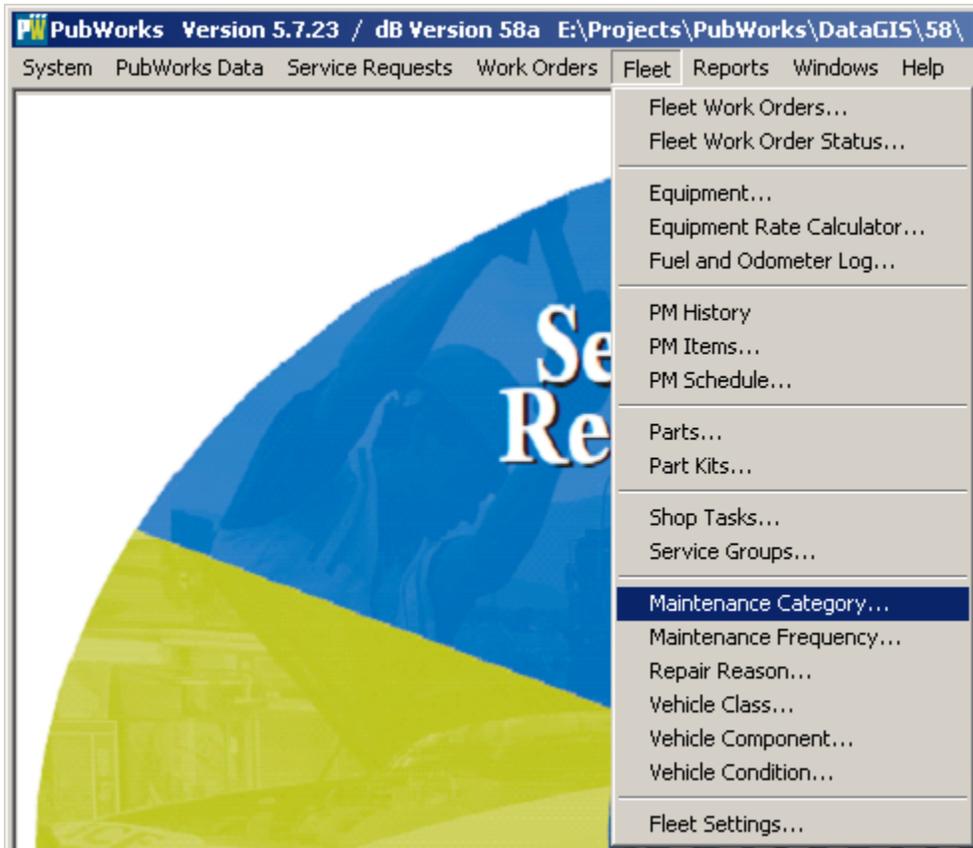
**PubWorks** Fleet is seamlessly integrated with the **PubWorks** road & bridge functions giving you one program for both fleet maintenance and road and bridge maintenance. As a result many program elements are shared and duplicate data entries are not required.

Are we missing any functionality you need? If so please tell us! Send us an email (to [support@PubWorks.com](mailto:support@PubWorks.com)) or phone us. Adding new features and functions to **PubWorks** is a mutually beneficial effort.

## Fleet Category Data

Category data is a means to add details to various records but in a way that is precise, reusable and standard. The primary benefits to using category data is consistent data qualifiers and reporting power.

Like category data in the rest of **PubWorks**, these records are simply defined by an eight character alpha-numeric code, a 64 character alpha-numeric name and an Active flag. You can add, modify and delete these records as you wish to best suit your department's needs – Maintenance Frequency being the only exception.



**Maintenance Categories** – help define certain classes of maintenance work such as emergency repair, routine, scheduled and similar notions. These items can be selected from the Work Order Detail screen.

**Repair Reason** – allows you to categorize why the equipment/vehicle is in for repair.

**Vehicle Class** – used to group equipment into more or less industry standard groups. These values can be selected on the Equipment Screen.

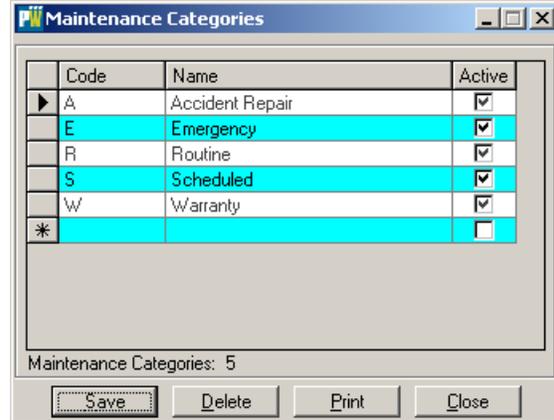
**Vehicle Component** – used to specify standard vehicle sub-systems and can be added to a Work Order to provide details as to what portion of a vehicle is being maintained.

**Vehicle Condition** – allows you to create distinct condition classes for vehicle assignment.

These data sets are all presented in a window similar to that depicted below. Entries are made directly to the blue and white grid as if it were a spreadsheet. New entries can be made in the grid's last line (marked by an asterisk).

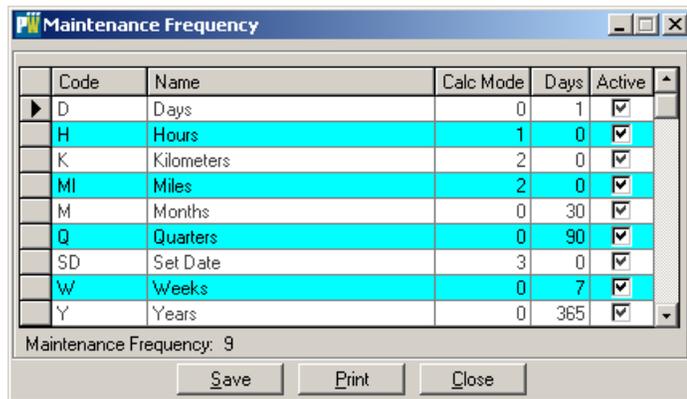
Additions and/or changes can be saved by moving off the current line, clicking the **Save** button or by closing the window.

The **Delete** button will delete the selected row (marked by a black arrow) and the **Print** button will create a listing report of the data in the grid.



**Maintenance Frequencies** – used to represent a fixed set of standard elapsed-time or usage values for the purposes of establishing PM items and triggers.

Like the preceding category tables, each record is defined by a code, a name and an active flag. Unlike the preceding category tables, this table can not be changed by the user but the values in the table are sufficient to meet any elapsed-time or utilization criterion.



Additionally columns for **Calculation Mode** and **Days** are included. Calculation Mode can be one of four values that drive PM triggers:

- 0 – Based on number of calendar days passed
- 1 – Based on the number of hours of use
- 2 – Based on the number of miles used
- 3 – Based on a specific calendar date

For those rows possessing a Calculation Mode value of 0, a set number of days is in place so **PubWorks** can properly perform date-based PM due calculations.

## Preventive Maintenance Items

Preventive Maintenance Items can be established for all of your equipment/vehicle using the Preventive Maintenance Items feature. This feature allows you to create any number of Preventive Maintenance Items giving each a code, a name and frequency values. Optionally, you can assign vehicle component and warranty flag information.

The screen below lists a sample set of generic/standard PM items that, once established here, can be applied to any piece of equipment in your database. Once a PM item is assigned to a piece of equipment, you can modify the frequency information to fit the piece of equipment appropriately.

General Information		Electrical Inspection (4)				
12 PM Items						
Code	Description	Frequency	Frequency Unit	Veh Component	Warr Item	Active
A	A Service	3,000	Miles		<input type="checkbox"/>	<input checked="" type="checkbox"/>
B	B Service	7,500	Miles		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Brakes	Brake Job	12	Months	Wheels and Brake	<input type="checkbox"/>	<input checked="" type="checkbox"/>
cat250	cat 250	250	Hours		<input type="checkbox"/>	<input checked="" type="checkbox"/>
cat500	cat 500	500	Hours		<input type="checkbox"/>	<input checked="" type="checkbox"/>
EI	Electrical Inspection	6	Months	Electrical System	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FH	Flush Hydraulic System	200	Hours	Hydraulics	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FT	Flush Transmission	6,000	Miles	Drive Train	<input type="checkbox"/>	<input checked="" type="checkbox"/>
X	Inspection	55	Weeks		<input type="checkbox"/>	<input checked="" type="checkbox"/>
LOF	Lube, Oil and Filter	3,000	Miles	Engine	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SI	Safety Inspection	1	Years		<input type="checkbox"/>	<input checked="" type="checkbox"/>
TR	Tire Rotation	6	Months	Wheels and Brake	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons: Add New, Modify, Delete, Associate, History, Reports, Close

### Adding PM Items

To add to your set of generic/standard PM items, click the **Add New** button and you will be presented with the screen below. The same screen will be used when you wish to modify an existing PM item. Enter information to describe the PM – code and name fields are 8 and 64 alpha-numeric characters respectively and must be unique. A numeric Frequency value and a Frequency Unit value from the drop list are required. Vehicle component and Warranty Item values are optional.

Click the **Save** button to save the newly added or modified PM item. Click **Cancel** to cancel an add-new or undo any modification made to an existing PM item. Once a PM item is saved it will appear in the Preventive Maintenance Items shown above.

Code: EI  
Description: Electrical Inspection  
Frequency: 6  
Frequency Unit: Months  
Vehicle Component: Electrical System  
Warranty Item:   
Record Active:

Buttons: Save, Cancel

### Modifying Existing PM Items

Modifying PM items is accomplished by clicking on a row to select a PM item on the Preventive Maintenance Items screen and then clicking the **Modify** button or just double-clicking the row. The PM item will be displayed in the small Preventive Maintenance Item screen show above. At this point you may make any change to it that you wish.

### Deleting PM Items

Deleting PM items can be accomplished by clicking on a row to select a PM item on the Preventative Maintenance Items screen and then clicking the **Delete** button. If the PM is associated to a piece of equipment, deletion will not be possible and **PubWorks** will render the PM item inactive.

### Printing PM Items

A variety of reports are available when you're ready to print PM Items.

- Click the Report button to display a screen that possesses eight different report choices

Or

- Click the Reports menu then Fleet Reports then PM Items Listing Reports

**Listing Reports**

Route Task Category Data  
Location Location Feature Materials/Parts  
Contractor/Vendor Employee Equipment  
Part Kits **PM Items** Service Groups

PM Item listing by Code  
 PM Item listing by Name

PM Items with Equipment by PM Item Code  
 PM Items with Equipment by PM Item Name  
 Reverse PM Item listing by Equipment Code  
 Reverse PM Item listing by Equipment Name  
 PM History by PM Item then Equipment Code  
 PM History by Equipment Code then PM Item

**Equipment Sort Order**  
 Sort by Equipment Code  
 Sort by Equipment Name

Equipment   
PM Item

OK Close Active Only

**Associated Equipment**

The Preventative Maintenance Item screen has a tab that displays a grid/list of the equipment associated to the selected PM item.

Notice that the PM item grid shown above has a highlighted/selected row. This row is distinguishable by the dark blue coloring but more importantly by the small, right-pointing triangular arrow on the extreme left of the selected row. This indicates that PM item “EI” / “Electrical Inspection” is selected.

General Information		Electrical Inspection (4)				
12 PM Items						
	Code	Description	Frequency	Frequency Unit	Veh Component	Warr Item
	A	A Service	3,000	Miles		<input type="checkbox"/>
	B	B Service	7,500	Miles		<input type="checkbox"/>
	Brakes	Brake Job	12	Months	Wheels and Brake	<input type="checkbox"/>
	cat250	cat 250	250	Hours		<input type="checkbox"/>
	cat500	cat 500	500	Hours		<input type="checkbox"/>
▶	EI	Electrical Inspection	6	Months	Electrical System	<input type="checkbox"/>
	FH	Flush Hydraulic System	200	Hours	Hydraulics	<input type="checkbox"/>
	FT	Flush Transmission	6,000	Miles	Drive Train	<input type="checkbox"/>

Once a PM item is selected, it is possible to view a list of equipment that possesses that particular PM item. To do this, simply click the tab that is labeled with the PM Item name. In this case it’s “Electrical Inspection”. The tab caption will possess the PM Item name and if there are any associated vehicle/equipment records, a number will appear in parenthesis indicating how many.

When you click on the tab, you will see each piece of equipment that possesses the selected PM item.

General Information		Electrical Inspection (4)				
4 Equipment Records						
	Eqp Code	Equipment Name	Frequency	Frequency Unit	Veh Component	Warr Item
▶	9008	Backhoe 580C	6	Months	Electrical System	<input type="checkbox"/>
	1080	Sander	6	Months	Electrical System	<input type="checkbox"/>
	1069	Sweeper	6	Months	Electrical System	<input type="checkbox"/>
	1038	Loader	6	Months	Electrical System	<input type="checkbox"/>

Buttons: Add New, Modify, Delete, Associate, History, Reports, Close

### Associating PM Items to Equipment

Once a PM Item has been created, the next step is to link or **associate** the PM Item to the appropriate equipment and vehicle. **PubWorks** gives you a very handy way to make these associations.

Click on the PM item of interest and then click the **Associate** button; the screen below will appear:

This screen allows you to associate the PM Items “in bulk” to equipment records based on...

- Equipment Type (the default selection)
- Equipment Code (unit number)
- Equipment Name (description)
- Department
- Vehicle Class

Once you make a selection from the drop list, the appropriate values will appear in the left-hand-side list. Move the desired items to the right-hand-side list and click **Add Association**. **PubWorks** will tell you how many pieces of equipment received the assignment.

To reverse the process, do the same but instead click **Remove Association**.

Worry Not: Performing multiple assignments will not create duplicate equipment-PM item associations.

**PM History**

To display the history of PM Items serviced, select the PM Item in the General Information tab.

PM Items					
General Information					Brake Job
12 PM Items					
	Code	Description	Frequency	Frequency Unit	Veh Comp
	A	A Service	3,000	Miles	
	B	B Service	7,500	Miles	
▶	Brakes	Brake Job	12	Months	Wheels and
	cat250	cat 250	250	Hours	
	cat500	cat 500	500	Hours	

Now, click the **History** button at the bottom of the screen to display the PM History Screen.

PM History									
Equipment					PM Item				
					Brake Job				
Maintenance Records: 4									
	WO ID	Date	Odometer	Equipment	PM Item	Mechanic	Labor (\$)	Parts (\$)	Total (\$)
▶	000032	02/04/10	375	1014	Brake Job	Brady, Billy	25.00	409.85	434.85
	000026	04/20/09	4,788	2015	Brake Job	Kramer, Jerry	120.32	409.85	530.17
	000005	01/23/09	3,500	2015	Brake Job	Riordan, Hank	187.50	410.00	597.50
	000001	12/05/08	2,500	2015	Brake Job	Kramer, Jerry	1,893.04	1,326.17	3,219.21

Display Selected Work Order      Close Window

This screen will display all Fleet Work Orders that have been created to service the selected PM Item.

Use the **Equipment** and/or **PM Item** drop lists to filter on specific vehicles or PM Items to display the precise information you seek.

Use the **Display Selected Work Order** button (or double-click a row in the grid) to display the Work Order used to service the PM item displayed.

## Equipment

Describe each piece of equipment in your operation in terms of make and model, equipment type and department categorization, cost rates, model year and replacement year.

- General descriptive and Identification information (16 character unit#/code, 64 character name/description)
- Categorizations equipment by Type, Department, Driver, Asset Class, Vehicle Class and Shop Location.
- Cost rates (primary and secondary) and cost basis (hour or mile)
- Depreciation parameters
- Last Service and Estimated use
- Utilization summary includes hours/miles of use, the cost of that use and MPG figures

**Equipment : F250 Pickup / 2015**

Reports | First | Previous | Next | Last | Add New | Save | Cancel | Delete | Locate | More\* | Specs\*

General Info | GASB 34\* | Odometer Log\* | Fleet WO Log\* | Activity Log\* | List View

Unit/Code: 2015 Record Active  Eqp Type: Pick Up Asset Class: Rolling Stock  
 Name: F250 Pickup Department: Parks Vehicle Class: Light Truck  
 Make: Ford Employee: Brady, Billy Shop Location:   
 Model: F250 3/4 Ton 4x4 Model Year: 1997 Condition:   
 Gross Vehicle Weight: 0  
 Vehicle ID # (VIN): 1FTHF26H4VED17655  
 License Plate #: 334A57  
 Registration #:   
 External Code: 1203  
 FEMA Identifier: PU  
 Old Unit/Code:   
 Acquisition Date: 01/01/1997 Flagged for Auction:   
 Disposal Date: Auction Year:   
 Replacement Year: 2007  
 Useful Life: 20  
 Original Cost (\$): 20,000.00 Calculate  
 Replacement Cost (\$): 25,000.00 Calculate Chart  
 Scrap Value (\$): 0.00

**Usage Cost Basis**  
 Usage Cost by the Hour   
 Usage Cost by the Mile   
 Primary Cost: \$/Hour: 33.00  
 Secondary Cost: \$/Hour: 39.00  
 FEMA Rate: \$/Hour: 20.00

**Service, Use and Seasonality**  
 Last Service: 5,788 07/27/2010  
 Has Odometer  Hours  Miles   
 Labor Rate (\$): 77.77  
 Annual Insurance Prem (\$): 0.00  
 Deductable (\$): 0.00  
 Estimated Mile/Mon: 1,000.00  
 Estimated Mile/Year: 12,000.00  
 Seasonal Start - Mon/Day:   
 Seasonal End - Mon/Day:   
**Utilization Summary**  

	Custom	MTD	QTD	YTD	LTD
Hours	1.00	0.00	1.00	111.00	5,933.00
Cost	33.00	0.00	33.00	3,663.00	159,561.00
MPG	0.00	0.00	0.00	0.00	4,748.00

Record: 6 of 17 | 2015 | F250 Pickup | Active: Yes

## Equipment Depreciation Schedule

- Parameter values (repeated from the General Information tab)
- Acquisition and Disposal dates
- Depreciation method radio buttons for method selection
- Calculate and clear buttons for manipulate the depreciation schedule
- Betterments button give you access to creating betterments, write-downs and disposals.
- Tab caption will possess an asterisk (\*) when a depreciation schedule is present.

Year	Depreciation Exp (\$)	Accumulated Depr (\$)	Book Value (\$)	BWD
1997	1,000.00	1,000.00	19,000.00	
1998	1,000.00	2,000.00	18,000.00	
1999	1,000.00	3,000.00	17,000.00	
2000	1,000.00	4,000.00	16,000.00	
2001	1,000.00	5,000.00	15,000.00	
2002	1,000.00	6,000.00	14,000.00	
2003	1,000.00	7,000.00	13,000.00	
2004	1,000.00	8,000.00	12,000.00	
2005	1,000.00	9,000.00	11,000.00	
2006	1,000.00	10,000.00	10,000.00	
2007	1,000.00	11,000.00	9,000.00	
2008	1,000.00	12,000.00	8,000.00	
2009	1,000.00	13,000.00	7,000.00	
2010	1,000.00	14,000.00	6,000.00	
2011	1,000.00	15,000.00	5,000.00	
2012	1,000.00	16,000.00	4,000.00	
2013	1,000.00	17,000.00	3,000.00	
2014	1,000.00	18,000.00	2,000.00	
2015	1,000.00	19,000.00	1,000.00	
2016	1,000.00	20,000.00	0.00	

Many of these fields are also part of the General Info tab. You do not have to enter the values twice - **PubWorks** automatically copies the values between the fields on these two tabs.

Use the **Create Schedule** button to create a new depreciation schedule for the vehicle. If a schedule already exists, this will remove/delete associated the depreciation from the vehicle and remove any Betterments created for the vehicle.

Use the **Clear Schedule** button to remove/delete associated the depreciation from the vehicle (this will also remove any Betterments created for the vehicle).

Use the **Betterments** button to create any betterments (capital improvements), write-downs or disposals for the vehicle.

## Equipment Odometer Log

The **Odometer Log** tab displays odometer and fueling transaction recordings for the displayed piece of equipment/vehicle.

Like other data grids in **PubWorks**, a variety of functions are available to make the data displayed more active and navigation easier.

- Column-click sorting to re-arrange the display of data.
- **Double-click locate to display the record in detail at which point it can be modified.**
- Grid caption displays record count.
- Tab caption will possess an asterisk (\*) when one or more records are present.
- Summary fields for quantity consumed and the cost of fuel.
- For a more comprehensive treatment of fueling and odometer log transactions and report, please see the Fuel and Odometer Log screen on page 37.

3 Odometer Log Records.								
Date	Miles	Hours	Quantity	Unit Cost	Fuel Cost	Fuel	Submitted By	Comment
07/27/10	6,000	0	20.00	2.07	41.36	GAS / Regular Gas		
06/13/09	167,717	0	17.03	2.17	36.96	GAS / Regular Gas	Watts, James	08/06/10 Gasboy - TRN#6497
06/03/09	167,517	0	17.03	2.17	36.96	GAS / Regular Gas	Watts, James	08/06/10 Gasboy - TRN#6497

Quantity: 54.06    Cost: 115.27

Record: 6 of 17    2015    F250 Pickup    Active: Yes

### Key Questions:

How do I get my GasBoy (or similar system) transactions into **PubWorks**?

### Answer:

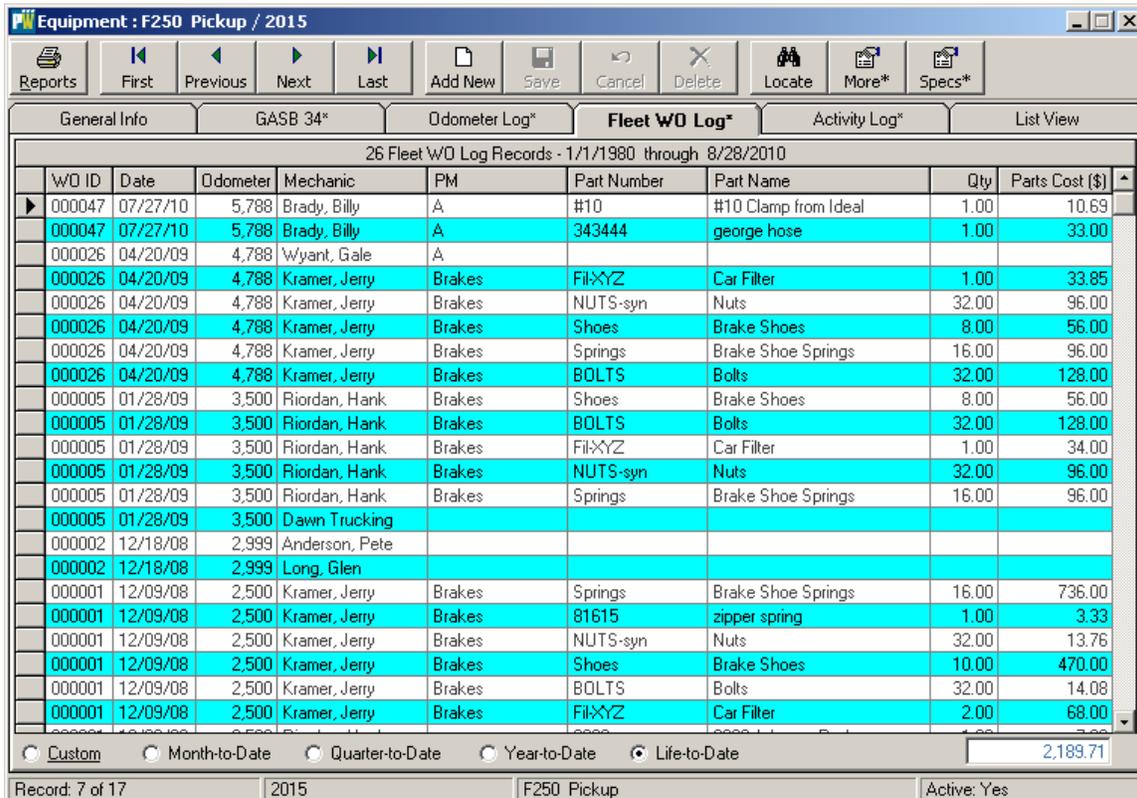
See page 37.

## Equipment Fleet Work Order Log

Displays the details of work performed on the vehicle.

Like other data grids in *PubWorks*, a variety of functions are available to make the data displayed more active and navigation easier.

- Column-click sorting to re-arrange the display of data.
- **Double-click locate to display the Work Order record in detail.**
- Radio-button-filtering (custom, month, quarter, year and life to date) to view data from any desired timeframe.
- Grid caption displays date range and record count.
- Tab caption will possess an asterisk (\*) when one or more records are present.
- Parts cost summary field.
- For a more comprehensive treatment of Fleet Work Orders, please see Fleet Work Order section on page 28.



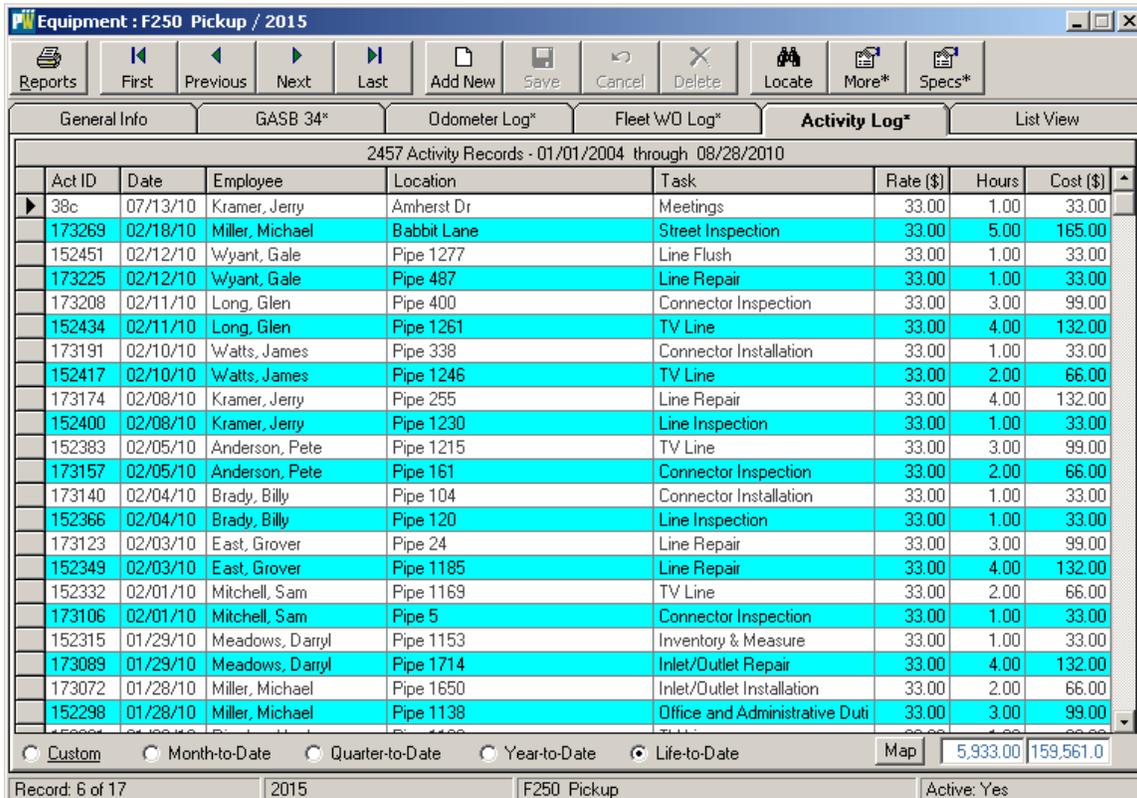
WO ID	Date	Odometer	Mechanic	PM	Part Number	Part Name	Qty	Parts Cost (\$)
000047	07/27/10	5,788	Brady, Billy	A	#10	#10 Clamp from Ideal	1.00	10.69
000047	07/27/10	5,788	Brady, Billy	A	343444	george hose	1.00	33.00
000026	04/20/09	4,788	Wyant, Gale	A				
000026	04/20/09	4,788	Kramer, Jerry	Brakes	FilterXYZ	Car Filter	1.00	33.85
000026	04/20/09	4,788	Kramer, Jerry	Brakes	NUTS-syn	Nuts	32.00	96.00
000026	04/20/09	4,788	Kramer, Jerry	Brakes	Shoes	Brake Shoes	8.00	56.00
000026	04/20/09	4,788	Kramer, Jerry	Brakes	Springs	Brake Shoe Springs	16.00	96.00
000026	04/20/09	4,788	Kramer, Jerry	Brakes	BOLTS	Bolts	32.00	128.00
000005	01/28/09	3,500	Riordan, Hank	Brakes	Shoes	Brake Shoes	8.00	56.00
000005	01/28/09	3,500	Riordan, Hank	Brakes	BOLTS	Bolts	32.00	128.00
000005	01/28/09	3,500	Riordan, Hank	Brakes	FilterXYZ	Car Filter	1.00	34.00
000005	01/28/09	3,500	Riordan, Hank	Brakes	NUTS-syn	Nuts	32.00	96.00
000005	01/28/09	3,500	Riordan, Hank	Brakes	Springs	Brake Shoe Springs	16.00	96.00
000005	01/28/09	3,500	Dawn Trucking					
000002	12/18/08	2,999	Anderson, Pete					
000002	12/18/08	2,999	Long, Glen					
000001	12/09/08	2,500	Kramer, Jerry	Brakes	Springs	Brake Shoe Springs	16.00	736.00
000001	12/09/08	2,500	Kramer, Jerry	Brakes	81615	zipper spring	1.00	3.33
000001	12/09/08	2,500	Kramer, Jerry	Brakes	NUTS-syn	Nuts	32.00	13.76
000001	12/09/08	2,500	Kramer, Jerry	Brakes	Shoes	Brake Shoes	10.00	470.00
000001	12/09/08	2,500	Kramer, Jerry	Brakes	BOLTS	Bolts	32.00	14.08
000001	12/09/08	2,500	Kramer, Jerry	Brakes	FilterXYZ	Car Filter	2.00	68.00

## Equipment Activity Log

Displays the details of work performed *by* the vehicle.

Like other data grids in *PubWorks*, a variety of functions are available to make the data displayed more active and navigation easier.

- Column-click sorting to re-arrange the display of data.
- **Double-click locate to display the Activity record in detail.**
- Radio-button-filtering (custom, month, quarter, year and life to date) to view data from any desired timeframe.
- Grid caption displays date range and record count.
- Tab caption will possess an asterisk (\*) when one or more records are present.
- Parts cost summary field.
- For a more comprehensive treatment of Activity Records, please see Activity section of the general *PubWorks* training guide.



Act ID	Date	Employee	Location	Task	Rate (\$)	Hours	Cost (\$)
38c	07/13/10	Kramer, Jerry	Amherst Dr	Meetings	33.00	1.00	33.00
173269	02/18/10	Miller, Michael	Babbit Lane	Street Inspection	33.00	5.00	165.00
152451	02/12/10	Wyant, Gale	Pipe 1277	Line Flush	33.00	1.00	33.00
173225	02/12/10	Wyant, Gale	Pipe 487	Line Repair	33.00	1.00	33.00
173208	02/11/10	Long, Glen	Pipe 400	Connector Inspection	33.00	3.00	99.00
152434	02/11/10	Long, Glen	Pipe 1261	TV Line	33.00	4.00	132.00
173191	02/10/10	Watts, James	Pipe 338	Connector Installation	33.00	1.00	33.00
152417	02/10/10	Watts, James	Pipe 1246	TV Line	33.00	2.00	66.00
173174	02/08/10	Kramer, Jerry	Pipe 255	Line Repair	33.00	4.00	132.00
152400	02/08/10	Kramer, Jerry	Pipe 1230	Line Inspection	33.00	1.00	33.00
152383	02/05/10	Anderson, Pete	Pipe 1215	TV Line	33.00	3.00	99.00
173157	02/05/10	Anderson, Pete	Pipe 161	Connector Inspection	33.00	2.00	66.00
173140	02/04/10	Brady, Billy	Pipe 104	Connector Installation	33.00	1.00	33.00
152366	02/04/10	Brady, Billy	Pipe 120	Line Inspection	33.00	1.00	33.00
173123	02/03/10	East, Grover	Pipe 24	Line Repair	33.00	3.00	99.00
152349	02/03/10	East, Grover	Pipe 1185	Line Repair	33.00	4.00	132.00
152332	02/01/10	Mitchell, Sam	Pipe 1169	TV Line	33.00	2.00	66.00
173106	02/01/10	Mitchell, Sam	Pipe 5	Connector Inspection	33.00	1.00	33.00
152315	01/29/10	Meadows, Darryl	Pipe 1153	Inventory & Measure	33.00	1.00	33.00
173089	01/29/10	Meadows, Darryl	Pipe 1714	Inlet/Outlet Repair	33.00	4.00	132.00
173072	01/28/10	Miller, Michael	Pipe 1650	Inlet/Outlet Installation	33.00	2.00	66.00
152298	01/28/10	Miller, Michael	Pipe 1138	Office and Administrative Duti	33.00	3.00	99.00

## Equipment List View

Displays a list of all equipment and vehicle you have inventoried in **PubWorks**.

Like other data grids in **PubWorks**, a variety of functions are available to make the data displayed more active and navigation easier.

- Column-click sorting to re-arrange the display of data.
- **Double-click locate to display an equipment/vehicle record in detail.**

Equipment : F250 Pickup / 2015

Reports First Previous Next Last Add New Save Cancel Delete Locate More\* Specs\*

General Info		GASB 34*		Odometer Log*		Fleet WO Log*		Activity Log*		List View	
Equipment Code	Equipment Name	Make	Model	Equipment Type	Department	Year	Repl Year	Int F			
9008	Backhoe 580C	Case	Super L	Heavy	Parks	2000	2015				
1099	Cat Dozer	Caterpillar	D6	Heavy	Public Works	2009					
1009	Curbside	GMC	15 CY	Sweeper	Public Works	1995	2015				
1045	Dozer D-6	Caterpillar	D6	Heavy	Public Works	1991	2021				
1010	Dump Truck with Plow	Mack		Dump Truck	Public Works	1990	2015				
▶ 2015	F250 Pickup	Ford	F250 3/4 Ton 4x4	Pick Up	Parks	1997	2007				
2005	F250 Crew Cab	Ford	F250	Pick Up	Parks	2009					
1006	Ford Dump Truck	Ford	9000	Dump Truck	Public Works	2009					
2101	Ford F150	Ford	F150	Pick Up	Parks	2000	2015				
2345	Ford F350 Pickup	Ford	F350	Pick Up	Public Works	2005					
1038	Loader	Case	624 E	Heavy	Public Works	1990	2015				
1014	Motorgrader	Caterpillar	140G	Heavy	Public Works	1996	2026				
9000	Police Cruiser	Ford	Crown Vic	Car	Police	2007					
1080	Sander	Hi-Way	E2020	Sweeper	Public Works	1996	2026				
1069	Sweeper	Elgin	Model - MRS196	Sweeper	Public Works	1993	2013				
2007	Tractor Mower	Kubota	RT-700	Mower	Parks	2002	2012				
1095	Trash Truck	International	I-9000	Sweeper	Public Works	2009					

Record: 6 of 17 | 2015 | F250 Pickup | Active: Yes

## Specs: Preventative Maintenance Items

You may have noticed that the equipment screen possesses a **Specs** button on its button bar. This button is used to display a special Equipment Specifications screen that stores Preventative Maintenance Items and a Required Parts list for each piece of equipment.

For each piece of equipment, any number of Warranty and Scheduled Maintenance (PM) items can be associated – this is where you established your Preventative Maintenance items.

In the example below four PM items are associated to the piece of equipment “Backhoe 16.” Each PM item has certain frequency data that helps **PubWorks** calculate when service will be required for the vehicle.

Each of these PM items was selected from a pre-established list of generic/standard PM items (as described above). Once selected the frequency, vehicle component and warranty item values can be modified to better fit the current piece of equipment.

To associate a new PM item to a piece of equipment, click in the last cell of the **Preventative Maintenance Items** column and a drop list down arrow will appear. Click the drop list down arrow and select a PM item from the list of generic/standard PM items you have already established. Once a PM item is selected, its default values will populate a new row. At this point, you can change the default Frequency, Frequency Units, Vehicle Component and Next Service date values. Moving (clicking) off the row will save the newly added or modified item as will clicking the OK button.

**2015 - F250 Pickup**

Gas    Engine: Ford 302 V8  
 Diesel    Serial #:    Model #:    Transmission:    Serial #:    Model #:

HP:    Air Filter:    Steering:    Front Axle:    Brakes:    Front Brake Pad:    Rear Brake Pad:    Rear End Make:    Rear End Capacity:

Oil Filter:    Fuel Filter:    Amps:    Tire Size:    Tire Ply:    Tire PSI:

Alternator:    Wheel Base:    Wheel Size:    Lugs:

Preventative Maintenance Items (7)						
Preventative Maintenance Items *	Warr Item	Frequency	Frequency Units *	Vehicle Component *	Service Date	
A Service	<input type="checkbox"/>	3,000	Miles			
B Service	<input checked="" type="checkbox"/>	7,500	Miles			
Brake Job	<input type="checkbox"/>	12	Months	Wheels and		
Flush Transmission	<input type="checkbox"/>	6,000	Miles	Drive Train		
Inspection	<input type="checkbox"/>	55	Weeks			
Lube, Oil and Filter	<input type="checkbox"/>	3,000	Miles	Engine		
Tire Rotation	<input type="checkbox"/>	6	Months	Wheels and		
*	<input type="checkbox"/>					

Record: 7 of 17               

Clicking the **Display History** button (or double clicking the row) will display a screen holding a grid listing all the Work Order detail records that have been created for the selected piece of equipment and the specific PM item. The history grid, shown below, possesses standard column click sort capabilities but also a double-click Fleet Work Order Locate – by clicking on a row in the grid, the associated Fleet Work Order is displayed.

Clicking on (selecting) a grid row and then clicking the **Display History** button accomplishes the same function.

Equipment: 2015 / F250 Pickup  
PM Item: Brake Job

Maintenance Records: 3

WO ID	Date	Odometer	Equipment	PM Item	Mechanic	Labor (\$)	Parts (\$)	Total (\$)
000026	04/20/09	4,788	2015	Brake Job	Kramer, Jerry	120.32	409.85	530.17
000005	01/23/09	3,500	2015	Brake Job	Riordan, Hank	187.50	410.00	597.50
000001	12/05/08	2,500	2015	Brake Job	Kramer, Jerry	1,893.04	1,326.17	3,219.21

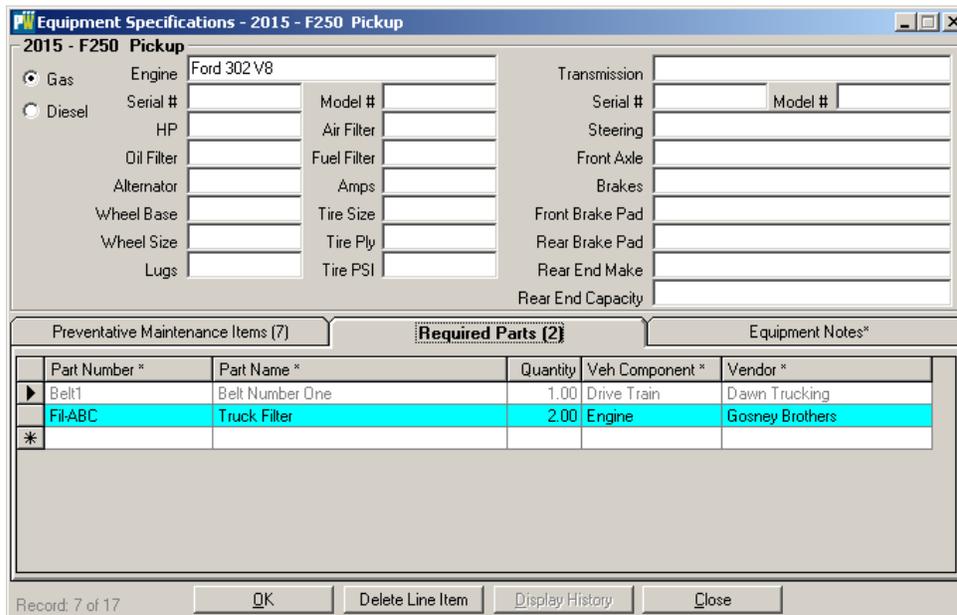
Buttons: Display Selected Work Order, Close Window

## Specs: Required Parts and Notes

This screen is designed to give you the ability to create a list of specific parts for a specific piece of equipment.

The **Required Parts** data grid can be filled out by selecting a part number (or part name) from the drop list that manifests in the **Part Number** cell. Once a part number is selected the part name will automatically be filled in.

A quantity value is required but values for vehicle component and vendor (which can be selected via cell-embedded drop lists) are optional.



**Equipment Specifications - 2015 - F250 Pickup**

2015 - F250 Pickup

Gas    Engine: Ford 302 V8    Transmission: \_\_\_\_\_

Diesel    Serial #: \_\_\_\_\_    Model #: \_\_\_\_\_    Serial #: \_\_\_\_\_    Model #: \_\_\_\_\_

HP: \_\_\_\_\_    Air Filter: \_\_\_\_\_    Steering: \_\_\_\_\_

Oil Filter: \_\_\_\_\_    Fuel Filter: \_\_\_\_\_    Front Axle: \_\_\_\_\_

Alternator: \_\_\_\_\_    Amps: \_\_\_\_\_    Brakes: \_\_\_\_\_

Wheel Base: \_\_\_\_\_    Tire Size: \_\_\_\_\_    Front Brake Pad: \_\_\_\_\_

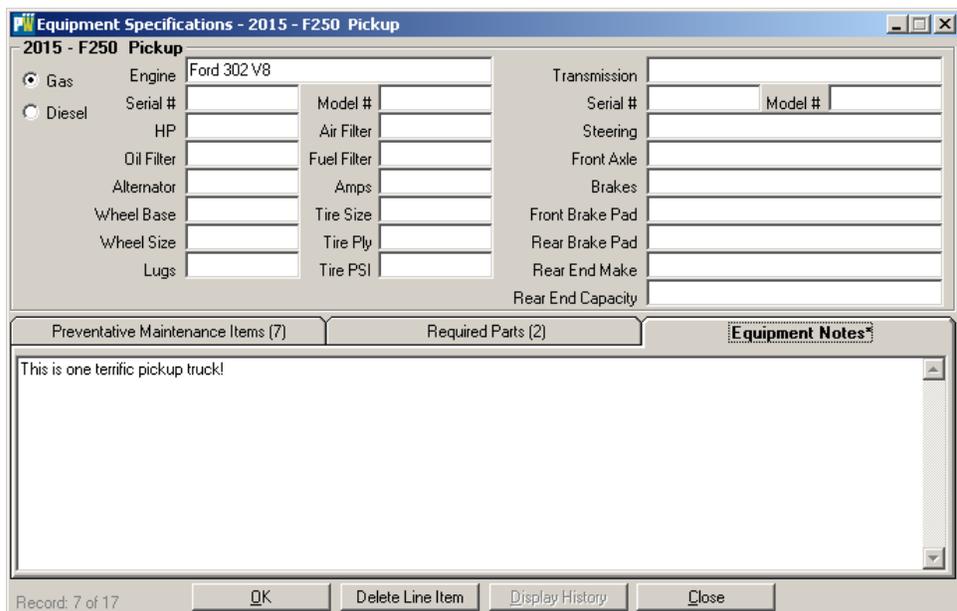
Wheel Size: \_\_\_\_\_    Tire Ply: \_\_\_\_\_    Rear Brake Pad: \_\_\_\_\_

Lugs: \_\_\_\_\_    Tire PSI: \_\_\_\_\_    Rear End Make: \_\_\_\_\_

Rear End Capacity: \_\_\_\_\_

Preventative Maintenance Items (7)		Required Parts (2)		Equipment Notes*	
Part Number *	Part Name *	Quantity	Veh Component *	Vendor *	
Belt1	Belt Number One	1.00	Drive Train	Dawn Trucking	
Fit-ABC	Truck Filter	2.00	Engine	Gosney Brothers	
*					

Record: 7 of 17               



**Equipment Specifications - 2015 - F250 Pickup**

2015 - F250 Pickup

Gas    Engine: Ford 302 V8    Transmission: \_\_\_\_\_

Diesel    Serial #: \_\_\_\_\_    Model #: \_\_\_\_\_    Serial #: \_\_\_\_\_    Model #: \_\_\_\_\_

HP: \_\_\_\_\_    Air Filter: \_\_\_\_\_    Steering: \_\_\_\_\_

Oil Filter: \_\_\_\_\_    Fuel Filter: \_\_\_\_\_    Front Axle: \_\_\_\_\_

Alternator: \_\_\_\_\_    Amps: \_\_\_\_\_    Brakes: \_\_\_\_\_

Wheel Base: \_\_\_\_\_    Tire Size: \_\_\_\_\_    Front Brake Pad: \_\_\_\_\_

Wheel Size: \_\_\_\_\_    Tire Ply: \_\_\_\_\_    Rear Brake Pad: \_\_\_\_\_

Lugs: \_\_\_\_\_    Tire PSI: \_\_\_\_\_    Rear End Make: \_\_\_\_\_

Rear End Capacity: \_\_\_\_\_

Preventative Maintenance Items (7)		Required Parts (2)		Equipment Notes*	
This is one terrific pickup truck!					

Record: 7 of 17

## Parts Inventory

This module handles your parts inventory. Each part can be categorized by material type, shop location, vendor information and fund. Values describing minimum and maximum inventory quantities can be entered to aid in the re-order process. Inventory additions are easy and straightforward and inventory reductions are made automatically through the Work Order recording process.

- General descriptive information (16 character code, 64 character name) and miscellaneous notes
- Records inventory summary and reorder information
- Provides means to categorize equipment by Type and Shop Location
- Provides means to assign Primary and Secondary Vendor
- Categorize equipment by Type and Shop Location
- Inventory pricing, cost, reorder and quantity information
- Add to Inventory and Transfer Inventory buttons provide capabilities described below

**Parts : #10 Clamp from Ideal / #10**

Reports | First | Previous | Next | Last | Add New | Save | Cancel | Delete | Locate | More\*

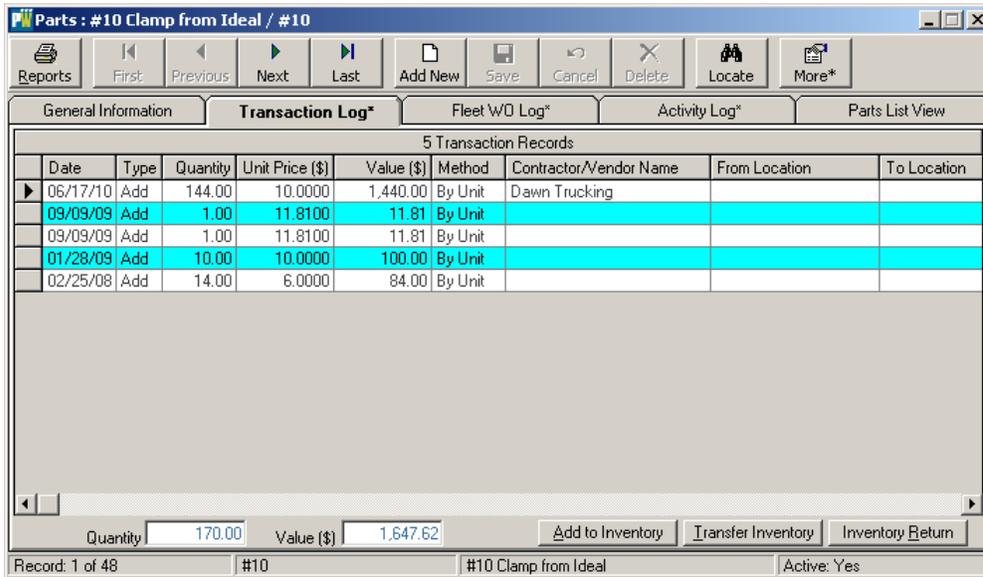
**General Information** | Transaction Log\* | Fleet WO Log\* | Activity Log\* | Parts List View

Part Number	#10	Record Active	<input checked="" type="checkbox"/>	Last Updated	06/17/2010
Part Name	#10 Clamp from Ideal	Quantity On Hand	72.0000	Inventory Value (\$)	
Part Type	Clamps	Avg Unit Cost (\$)	10.6932		769.9104
Shop Location	Public Works Shop	Last Price Paid (\$)	10.0000		720.0000
Aisle/Shelf/Bin	1 2 3	FEMA Rate (\$)	0.0000		
Vendor One	Dawn Trucking	Minimum Quantity	75.0000		
Vendor Two	Fleming Chemical Co, Inc.	Re-Order Quantity	150.0000		
Vendor Part #		<input type="button" value="Add to Inventory"/>			
Fund		<input type="button" value="Transfer Inventory"/>			
Misc. Note	Added on-the-fly: Work Order #34				
Field Material	<input type="checkbox"/>	Stock Item	<input checked="" type="checkbox"/>	<input type="button" value="Inventory Return"/>	
Shop Part	<input checked="" type="checkbox"/>	Added on-the-Fly	<input checked="" type="checkbox"/>		
Environmental Fee	<input type="checkbox"/>				

Record: 1 of 48 | #10 | #10 Clamp from Ideal | Active: Yes

### Parts Transaction Log

- Column-click sorting
- Double-click Transaction log record edit
- Grid caption displays transaction record count
- Tab caption will possess an asterisk (\*) when one or more records are present.
- Parts quantity and value summary



Parts : #10 Clamp from Ideal / #10

Transaction Log\* (5 Transaction Records)

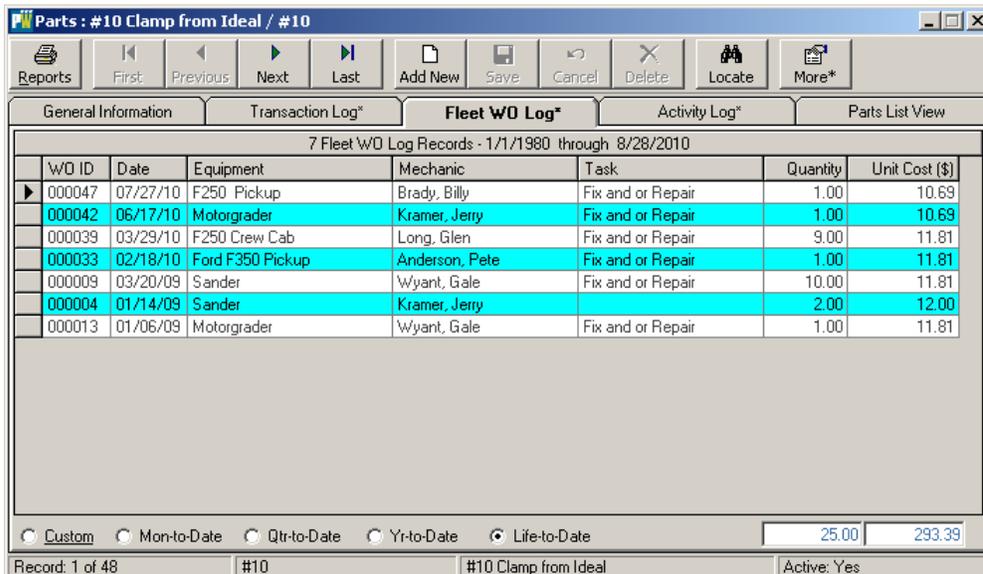
Date	Type	Quantity	Unit Price (\$)	Value (\$)	Method	Contractor/Vendor Name	From Location	To Location
06/17/10	Add	144.00	10.0000	1,440.00	By Unit	Dawn Trucking		
09/09/09	Add	1.00	11.8100	11.81	By Unit			
09/09/09	Add	1.00	11.8100	11.81	By Unit			
01/28/09	Add	10.00	10.0000	100.00	By Unit			
02/25/08	Add	14.00	6.0000	84.00	By Unit			

Quantity: 170.00 Value (\$): 1,647.62

Record: 1 of 48 #10 #10 Clamp from Ideal Active: Yes

### Parts Fleet Work Order Log

- Column-click sorting
- Double-click Fleet Work Order record locate
- Radio-button-filtering (week, month, quarter, year and life to date)
- Grid caption displays date range and record count
- Tab caption will possess an asterisk (\*) when one or more fleet work order records are present.
- Parts quantity and cost summary



Parts : #10 Clamp from Ideal / #10

Fleet WO Log\* (7 Fleet WO Log Records - 1/1/1980 through 8/28/2010)

WO ID	Date	Equipment	Mechanic	Task	Quantity	Unit Cost (\$)
000047	07/27/10	F250 Pickup	Brady, Billy	Fix and or Repair	1.00	10.69
000042	06/17/10	Motorgrader	Kramer, Jerry	Fix and or Repair	1.00	10.69
000039	03/29/10	F250 Crew Cab	Long, Glen	Fix and or Repair	9.00	11.81
000033	02/18/10	Ford F350 Pickup	Anderson, Pete	Fix and or Repair	1.00	11.81
000009	03/20/09	Sander	Wyant, Gale	Fix and or Repair	10.00	11.81
000004	01/14/09	Sander	Kramer, Jerry	Fix and or Repair	2.00	12.00
000013	01/06/09	Motorgrader	Wyant, Gale	Fix and or Repair	1.00	11.81

Custom Mon-to-Date Qtr-to-Date Yr-to-Date Life-to-Date

Record: 1 of 48 #10 #10 Clamp from Ideal Active: Yes

## Adding / Returning / Transferring your Parts Inventory

The General Information tab and Transaction Log tab on the Part screen possess three Inventory Transaction buttons; when clicked, this button will display the screen below. The screen will, by default be filled in with values inherited from the part that was in view.

Minimum Qty	144.0000
Re-Order Qty	144.0000
Add to Inventory	
Transfer Inventory	
Inventory Return	

Entering a unit count and unit cost for the parts being added and then clicking the **Calculate** button, you will be able to see how the inventory addition affects current inventory. If you are satisfied with the inventory addition, click the Save button and your inventory will automatically be updated.

Click the **Clear** button clear this screen's fields and any calculation performed.

Click **Cancel** to close the screen with out updating inventory.

Click **Save** to save the inventory addition and update current inventory values.

## Part Kits

Part kits allow you to assemble any number of inventory parts into a group that can be selected and used as a unit on a Fleet Work Order detail record. Creating part kits that group sets of parts that are frequently used could save a great deal of time while performing Work Order Detail data entry.

Like all other records in **PubWorks**, each Part Kit requires a unique code and a unique name. An optional Default Task can be selected or entered.

Once a part kit code and name are established, you can enter parts into the part kit grid by either typing the part number or part name or selecting parts from a drop list that appears when you click in the part number or part name cells.

When a part is selected, the quantity value is set to 1 and the unit cost is set based on current inventory information. If your entry requires more than one part, then you can directly alter the quantity value in the grid. The total cost for the selected part is automatically calculated as is the total cost of all parts in the kit.

The screenshot shows the 'Part Kits : Brake Kit / BKit' window. It includes a toolbar with buttons for Reports, First, Previous, Next, Last, Add New, Save, Cancel, Delete, and Locate. The 'General Information' tab is active, showing fields for Code (BKit), Name (Brake Kit), Default Task (Replace), and a checked 'Part Kit Active' box. Below this is a table of components:

	Part Number *	Part Name *	Quantity	Unit Cost (\$)	Total (\$)
▶	Shoes	Brake Shoes	8.00	25.00	200.00
	Springs	Brake Shoe Springs	16.00	4.75	76.00
	NUTS-syn	Nuts	32.00	0.35	11.20
	BOLTS	Bolts	32.00	0.25	8.00
	Filter-XYZ	Car Filter	1.00	5.25	5.25
*					

At the bottom of the window, it shows 'Kit Components: 5', a 'Total (\$)' of 300.45, and a status bar indicating 'Record: 1 of 3', 'BKit', 'Brake Kit', 'Replace', and 'Active: Yes'.

Moving off a row in the parts grid will save the data in the row if data has been added or modified – clicking the **Save Part** button will have the same effect.

To delete a part from the parts grid, simply click on the row to select it and then click the **Delete Part** button.

Established and active Part Kits will appear in the Work Order Detail parts drop lists with a special designation of **K** for kit. When selected all the parts in the kit will expand into the Work Order Detail record with your selected quantities and the last inventory unit costs. Once expanded, individual parts from the kit can be altered or removed from the Work Order Detail record.

## Part Kit List View

- All Part Kits listed together
- Column click sorting
- Double-click Part Kit locate

The screenshot shows a software window titled "Part Kits : Brake Kit / BKit". The window has a menu bar with options: Reports, First, Previous, Next, Last, Add New, Save, Cancel, Delete, and Locate. Below the menu bar is a tabbed interface with "General Information" and "Part Kit List View". The "Part Kit List View" tab contains a table with the following data:

Part Kit Code	Part Kit Name	Default Task Name	Active
BKit	Brake Kit	Replace	<input checked="" type="checkbox"/>
OC-C	Oil Change - Car	Fix and or Repair	<input checked="" type="checkbox"/>
OC-T	Oil Change - Truck	Replace	<input checked="" type="checkbox"/>

At the bottom of the window, there is a status bar showing: Record: 1 of 3 | BKit | Brake Kit | Replace | Active: Yes

## Shop Tasks

Shop tasks are used to describe, in detail, the exact nature of the work performed when parts are installed or replaced on a piece of equipment on the Work Order Detail record.

You can define a large set of Shop Tasks to capture a high level of detail or you can define a small set to capture less detail but you will have to define at least on Shop Task as it is a required field in the Work Order Detail record.

**Shop Tasks : Brake Job / BRK**

Reports | First | Previous | Next | Last | Add New | Save | Cancel | Delete | Locate | More

**General Information** | Description\* | Task List View

Task Code:  Record Active:

Task Name:

Task Type:

Ext Code:

**Activities Require/Allow**

Employee  Fund  Zero Emp Hours   
 Contractor  Project  Force 0 Eqp Hr/Mi   
 Equipment  Service  Force 0 Eqp Rate   
 Materials  Request

**Unit Cost Accounting Settings**

Requires Units

	MTD	QTD	YTD	LTD
Total Cost	0.00	0.00	73.75	1,534.46
Prod Units	0	0	0	0
\$ / Unit	0.00	0.00	0.00	0.00

Unit Type:

Standard Hours:

**Overhead, GASB, GIS**

Include in Overhead Allocations   
 Include in GIS Export Filtering

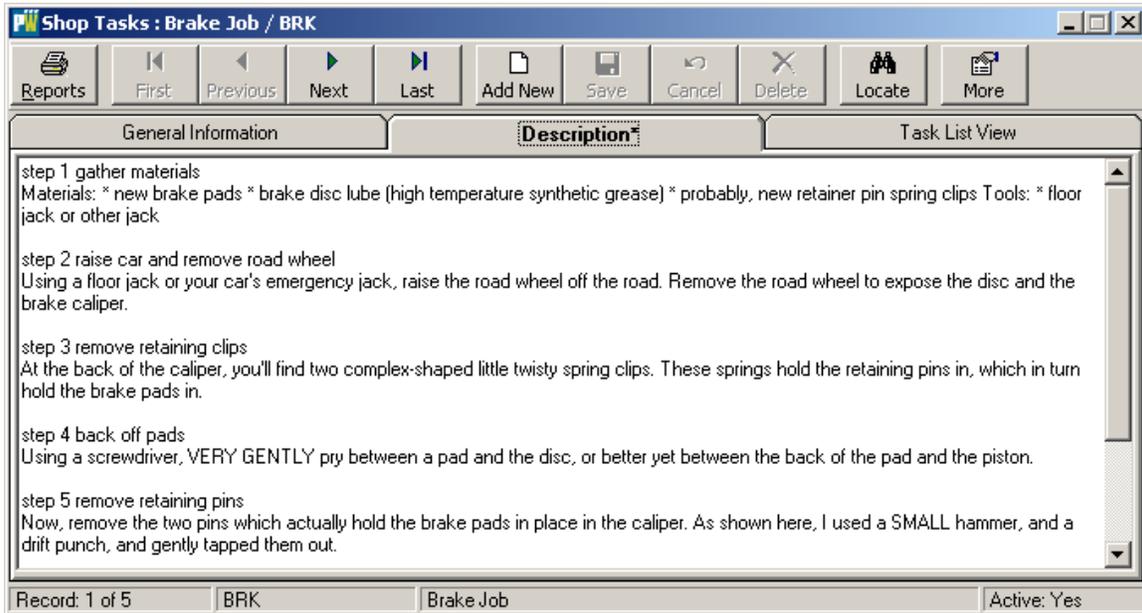
Record: 1 of 5 | BRK | Brake Job | Active: Yes

Some key considerations for shop tasks:

- Shop tasks are differentiated from field tasks using the check boxes in the lower left-hand corner.
- Categorizing by Task Type can be helpful in providing added reporting power.
- A default standard hours value can be established.

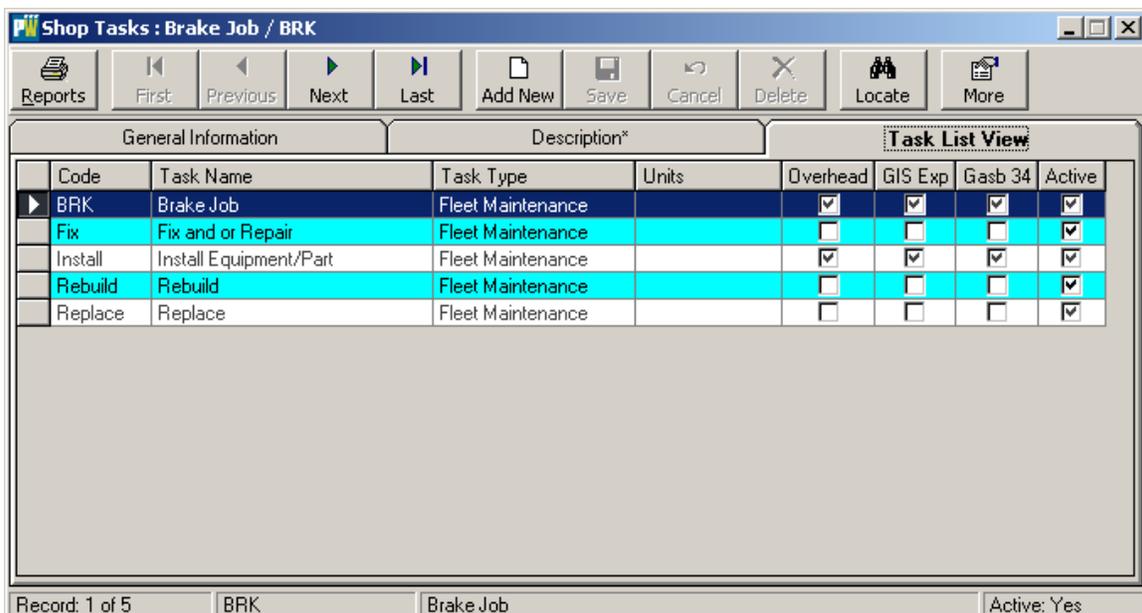
## Task Description

A narrative task description can be created and stored with the task record.



## Task List View

- All Tasks listed together
- Column click sorting
- Double-click Task locate



## Service Groups

Service Groups allow you to assemble any number of shop tasks and inventory parts into a group that can be selected and used as a unit on a Fleet Work Order detail record. Creating Service Groups that combine sets of tasks and parts that are frequently used together could save a great deal of time while performing Work Order Detail data entry.

Like all other records in **PubWorks**, each Service Group requires a unique code and a unique name.

**Service Groups : Brakes/Belts/Lube / BBL**

Reports First Previous Next Last Add New Save Cancel Delete Locate

**General Information** Service Group List View

Code	Name	Hours	Task Count	Parts Count	Parts Cost (\$)
BBL	Brakes/Belts/Lube		5	65.00	396.74

Service Group Active

**Tasks / Parts**

Add Task Modify Delete  Show All Parts

Task Name	Hours
Fix and or Repair	
Install Equipment/Part	
Replace	
Replace	
Street Sweeping	

Part Number	Part Name	Quantity
#16	#16 Ideal Hose Clamp	1.00
10w40	10w40 Motor Oil	4.00
Belt1	Belt Number One	1.00
Belt2	Belt Number Two	1.00
BOLTS	Bolts	16.00
Springs	Brake Shoe Springs	16.00
Shoes	Brake Shoes	8.00
FilterXYZ	Car Filter	1.00
NUTS-syn	Nuts	16.00
Plugs	Spark Plugs	1.00

Record: 1 of 2      BBL      Brakes/Belts/Lube      Active: Yes

Once a Service Group code and name are established and saved, you can enter tasks and parts by clicking the **Add Task** button. See screen depiction below.

Adding a task is done by selecting the task code or the task name from the drop list. Once a task is selected the Parts grid will become enabled and parts can be selected from the embedded part drop lists that appear in the **Part Number** and **Part Name** cells. Selecting or enter a Part Number will cause the Part Name to appear and vice versa.

When a part is selected, the quantity is automatically filled in with a value of 1. To change this default value, edit the cell directly on the grid.

To save any added or modified data you can click the **OK** button.

To remove a part from the part grid click on the row containing the part you wish to delete and then click the **Delete** button.

The **Cancel** button will undo any unsaved changes.

Established and active Service Groups will appear in the Work Order Detail tasks drop lists with a special designation of **SG** for Service Group. When selected all the tasks and parts in the Service Group will expand into the Work Order Detail record with your selected quantities and the last inventory unit costs. Once expanded, individual tasks and part from the Service Group can be altered or removed.

Service Group Add/Modify

Task Code / Name  
Fix    Fix and or Repair

Parts (3)		
Part Number *	Part Name *	Quantity
Shoes	Brake Shoes	8.00
NUTS-syn	Nuts	16.00
BOLTS	Bolts	16.00
*		

OK    Delete    Cancel

### Service Group List View

- All Service Groups listed together
- Column click sorting
- Double-click Service Group locate

Service Groups : Brakes/Belts/Lube / BBL

Reports    First    Previous    Next    Last    Add New    Save    Cancel    Delete    Locate

General Information    **Service Group List View**

Code	Name	Hours	Tasks	Parts	Value (\$)	Active
BBL	Brakes/Belts/Lube		4	64	319.16	<input checked="" type="checkbox"/>
TB	Timing Belt Replacement		1	2	19.00	<input checked="" type="checkbox"/>

Record: 1 of 2    BBL    Brakes/Belts/Lube    Active: Yes

## Fleet Work Orders

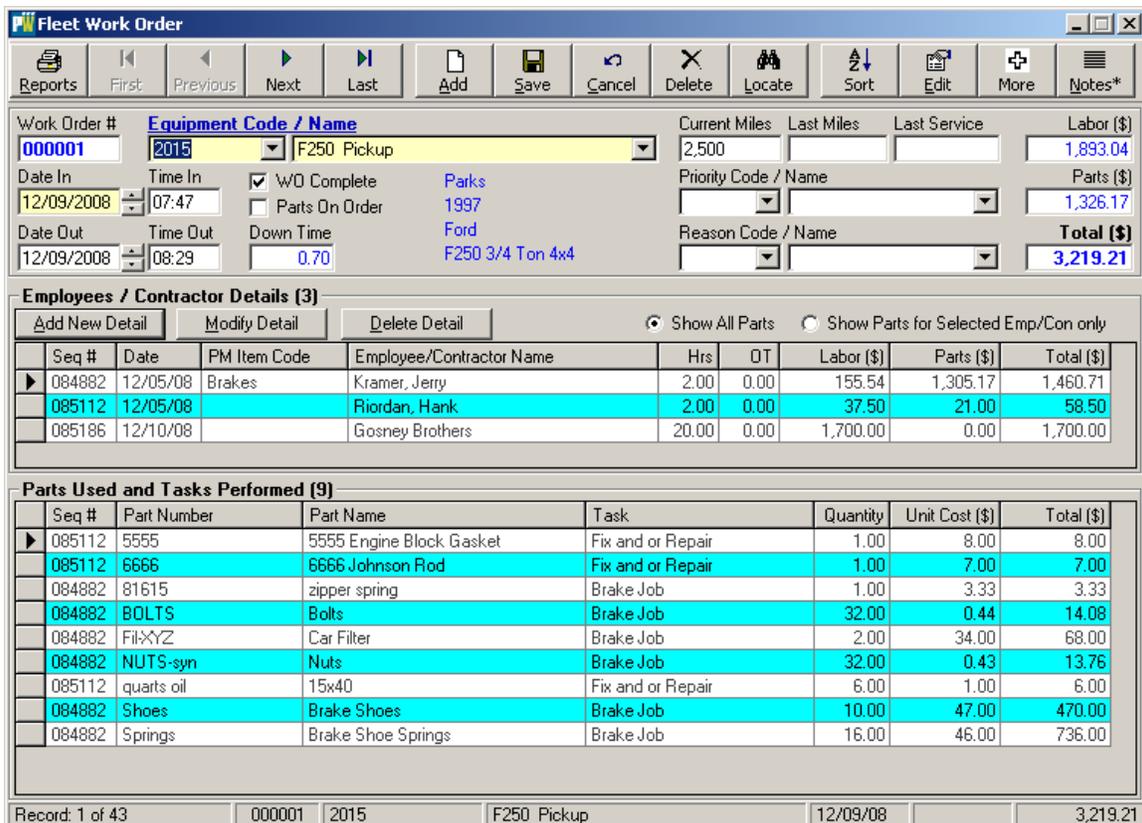
Fleet Work Orders are the crux of the **PubWorks** Fleet system – here is where maintenance costs (parts and labor) are recorded and associated to your equipment and vehicles.

A Fleet Work Order can be associated with one and only one piece of equipment/vehicle but multiple employees and/or contractors can contribute to the Work Order. The Work Order comes in two parts, the **Work Order Header** and then one or more **Work Order Detail** records.

The Work Order Header records the system-assigned Work Order ID number, the equipment/vehicle, the Work Order dates and odometer readings. Additionally, Priority and Reason codes can be recorded.

The screen below displays one Work Order (number 1) that records work performed on the Ford F250 Pickup (unit# 2015) Truck. The work was performed by two in-house employees **and** a contractor. Nine distinct parts were used to complete the work. The total Work Order cost was \$3,219.21 where \$1,893.04 came from labor and \$1326.17 from parts.

This Work Order has three Work Order Detail records: #84882, #85112 and #85186. The three detail records are composed of nine parts that were installed or replaced on the vehicle.



Work Order #	Equipment Code / Name	Current Miles	Last Miles	Last Service	Labor (\$)
000001	2015 F250 Pickup	2,500			1,893.04

Date In	Time In	W/D Complete	Parts On Order	Priority Code / Name	Parts (\$)
12/09/2008	07:47	<input checked="" type="checkbox"/>	<input type="checkbox"/>		1,326.17

Date Out	Time Out	Down Time	Reason Code / Name	Total (\$)
12/09/2008	08:29	0.70		3,219.21

Seq #	Date	PM Item Code	Employee/Contractor Name	Hrs	OT	Labor (\$)	Parts (\$)	Total (\$)
084882	12/05/08	Brakes	Kramer, Jerry	2.00	0.00	155.54	1,305.17	1,460.71
085112	12/05/08		Riordan, Hank	2.00	0.00	37.50	21.00	58.50
085186	12/10/08		Gosney Brothers	20.00	0.00	1,700.00	0.00	1,700.00

Seq #	Part Number	Part Name	Task	Quantity	Unit Cost (\$)	Total (\$)
085112	5555	5555 Engine Block Gasket	Fix and or Repair	1.00	8.00	8.00
085112	6666	6666 Johnson Rod	Fix and or Repair	1.00	7.00	7.00
084882	81615	zipper spring	Brake Job	1.00	3.33	3.33
084882	BOLTS	Bolts	Brake Job	32.00	0.44	14.08
084882	Fil-YZ	Car Filter	Brake Job	2.00	34.00	68.00
084882	NUTS-syn	Nuts	Brake Job	32.00	0.43	13.76
085112	quarts oil	15x40	Fix and or Repair	6.00	1.00	6.00
084882	Shoes	Brake Shoes	Brake Job	10.00	47.00	470.00
084882	Springs	Brake Shoe Springs	Brake Job	16.00	46.00	736.00

Record: 1 of 43 | 000001 | 2015 | F250 Pickup | 12/09/08 | 3,219.21

All Work Order and Work Order Detail ID numbers are generated automatically by **PubWorks**. These numbers start a one and go to two billion. When a Work Order or Work Order Detail record is saved the next available number is assigned to the record. If the record deleted, the assigned number is lost forever. Work Order and Work Order Detail each have their own separate set of non-conflicting ID numbers.

The Work Order Detail records the employee (or contractor) performing the work, labor hours, standard hours, maintenance category, vehicle component, PM item and most importantly, the parts and tasks used to perform the work.

The Work Order Detail record below shows the employee who performed the work, his labor hours and labor rate.

A **standard task** can be selected as well as a value for standard hours from a choice of default, minimum, maximum and average. A new value for standard hours can be entered as well. The values used for , minimum, maximum and average are derived from the history of Work Orders that have made use of that task.

*Notice that a PM item is present.* The PM item drop list is filled with the PM items specific to the piece of equipment being worked on, in this case, unit 2015 – F250 Pickup.

Selection can also be made for maintenance category, vehicle component and shop location.

The **Parts Used and Tasks Performed** grid possesses five rows indicating the quantity and cost of each part used and the shop task used to install or replace each part.

**Fleet Work Order Detail - 000001 / 2015 - F250 Pickup / Parks**

Employee Code / Name: 00 Kramer, Jerry Date: 12/05/2008 Hours: 2.00 Rate (\$): 77.77 Cost (\$): 155.54 Labor (\$): 155.54

Contractor Code / Name: Labor Type: Regular OT: 0.00 77.77 0.00 Parts (\$): 1,305.17 Total (\$): 1,460.71

Standard Task Code / Name: BRK Brake Job Standard Hours: 0.00 Notes:

PM Item Code / Name (12 Months): Brakes Brake Job Vehicle Component Code / Name:

Maintenance Category Code / Name: S Scheduled

Parts Used and Tasks Performed (6)						
Part Number *	Part Description *	Task Code *	Task Name *	Quantity	Unit Cost (\$)	Total (\$)
81615	zipper spring	BRK	Brake Job	1.00	3.33	3.33
BOLTS	Bolts	BRK	Brake Job	32.00	0.44	14.08
Filter:XYZ	Car Filter	BRK	Brake Job	2.00	34.00	68.00
NUTS-syn	Nuts	BRK	Brake Job	32.00	0.43	13.76
Shoes	Brake Shoes	BRK	Brake Job	10.00	47.00	470.00
Springs	Brake Shoe Springs	BRK	Brake Job	16.00	46.00	736.00
*						

Buttons: Save Delete Line-Item Cancel

## Adding Work Orders

To add a new Work Order click the **Fleet** menu and then the **Work Orders** menu item – this loads the Fleet Work Order screen. The Fleet Work Order screen has an **Add** button on its button bar, clicking this button will start the add-new process.



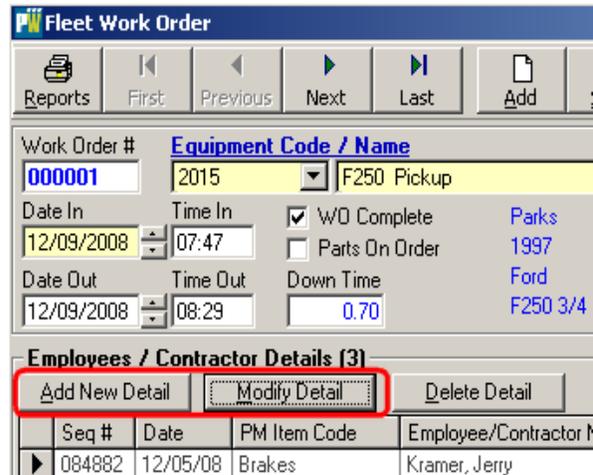
Automatically, **PubWorks** will fill in the **Work Order ID**, **Date In** and **Time In** fields. With the exception of the Work Order ID field you can change these values if you wish.

The cursor is placed in the Equipment Code drop list – you can select a piece of equipment by code or by name (using the Equipment Name drop list) or you can type in the code or name.

After you have selected a piece of equipment, you can enter the latest odometer reading (if necessary). With each successive **Tab** key hit, you will be moved to the next field in the tab order at which point you can enter or modify the information in that field.

Click the **Add New Detail** button to display a blank/new Work Order Detail screen. (You can click the **Modify Detail** button to make change to already existing Work Order Detail records.)

The blank/new Work Order Detail screen requires either an employee or contractor as the performer of the work you wish to record. If an employee is selected (by code or name from the appropriate drop lists) the employee’s pay rates will automatically be filled in on the screen. When you enter the number of labor hours, **PubWorks** will then calculate labor cost. If you select a contractor instead of an employee, you will have enter both labor hours and the labor rate – **PubWorks** will use these values to calculate labor cost for the contractor.



Values for Maintenance Category and Shop Location can be selected even if they are filled in by **PubWorks** thanks to their default values in Fleet Settings. Also, a value for Vehicle Component and PM item can be selected if desired or required. Lastly a 64 character comment or note can be added to the Work Order Detail to help describe the work performed.

Please note that the selection of a PM item will indicate to **PubWorks** that the PM has been “taken care of” in this Work Order and will have a direct impact of the results of an **Equipment Due Maintenance** operation performed elsewhere in **PubWorks**.

**Navigation Tip:** Note that the label for **Equipment Code / Name** is underscored and bold. Clicking this label will locate and display the equipment/vehicle record whose code and name are in the drop down lists.

## Adding Parts Used and Tasks Performed

The **Parts Used and Tasks Performed** data grid in the lower half of the Work Order Detail screen contains four embedded drop lists – a parts number/name pair and a task code/name pair (this fact is indicated by the asterisk that appears in each of these column headings).

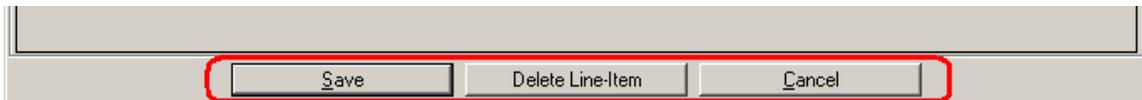
To add a part, click in the first empty Part Number cell; a drop list down arrow will appear. At this point you can either open the drop list and select a part number or you can type the part number in if you wish. Once a part number is selected, its matching part name/description will be filled in automatically. Additionally a part quantity of one will be filled in as will the current unit cost of the part.

Moving the cursor off the row will cause the row data to validated and saved (if valid). If you have entered or selected a task, **PubWorks** will automatically fill in task for you if you have selected a default task in Fleet Settings or the task will be filled in with the task value from the row above.

As parts are entered in the grid they are removed from inventory based on the quantity entered. If a part row is deleted or its quantity altered, inventory is updated to reflect the deletion or alteration.

## Saving the Detail Record

When you are satisfied with the entries you have made in the Work Order Detail record, click the Save button. **PubWorks** will validate the information you have entered and will, if there is a validation error, place the cursor in the offending field so you have the opportunity to make to appropriate correction.



The required fields on the Work Order Detail record are the Employee/Contractor selection plus the appropriate labor hours, a Labor Type and a Shop Locations (if this Fleet Setting is so selected). In the Parts grid, Part Number and Name are required as are Task Code and Name, Quantity and Unit Cost.

If you need to delete a line item in the Parts Used grid, click any where on the row you wish to delete and then click the **Delete Line Item** button. **PubWorks** will ask you to confirm the deletion and if you do the line item will be deleted and the part quantity “returned” to inventory.

The **Cancel** button will have a similar effect in that any new information added to the Detail record will be removed, part quantities returned to inventory and the detail record will go unaffected. Further, the Detail screen will be closed and you will be returned to the main Work Order screen.

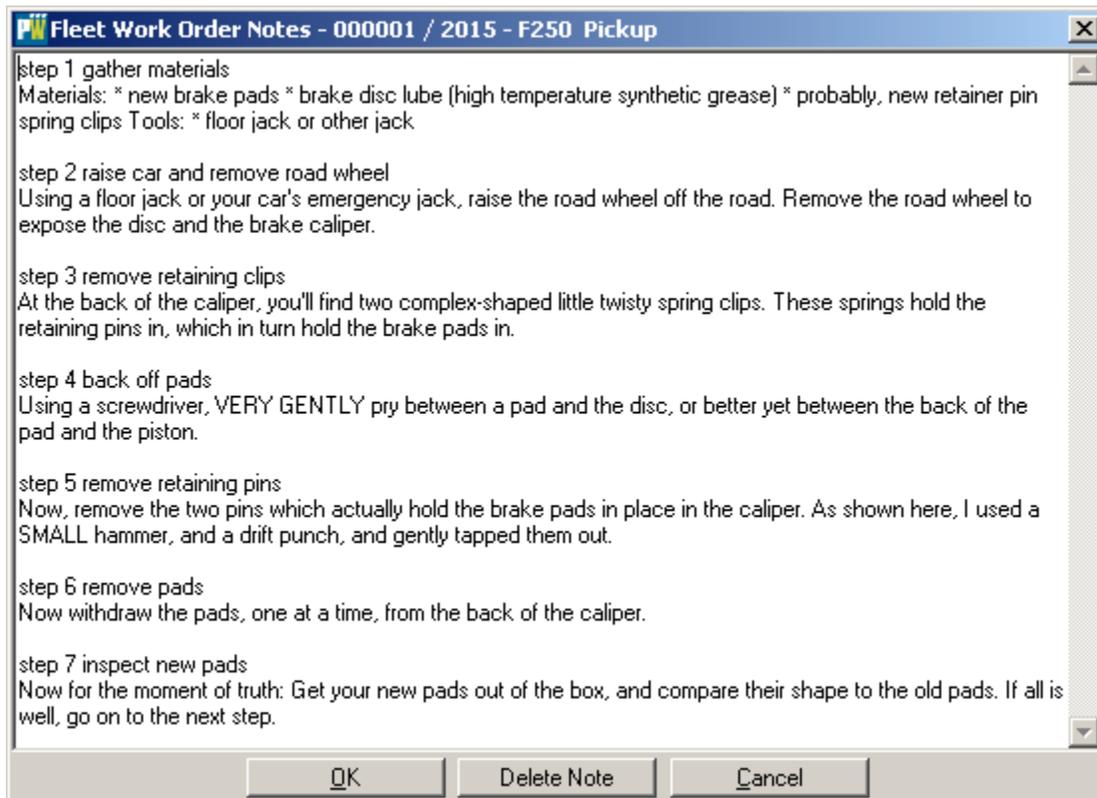
The **Save** button will cause the detail record to be saved (as described above) the detail record will be closed and you will be brought back the main Work Order screen with updated information.

## Work Orders: Special Considerations



The Fleet Work Order screen displays all data initially in a locked mode to prevent unintentional changes. It is clearly important to be able to correct and/or add to existing Work Orders. This is easily accomplished by clicking the **Edit** button on the button bar. Such a click will render all fields unlocked giving you the ability to make any change you wish. Once your edit is complete, click the **Save** button. When you save the record, the same validation process will be performed as described above for new records.

A large, free form note or comment can be attached to each Fleet Work Order. When you click the **Notes** button a screen will appear into which you can type a note of unlimited size. The **Notes** button will possess an asterisk (\*) when a note has been entered for the Fleet Work Order.



### Things to Notice

Notice that most of the data entry fields are in the form of drop-lists and that drop lists are *paired*. The pairing takes the form of a code drop list followed by a name drop list. These paired drop-lists work in unison – selecting a value from the code drop-list will cause its matching value in the name drop-list to appear and vice versa.

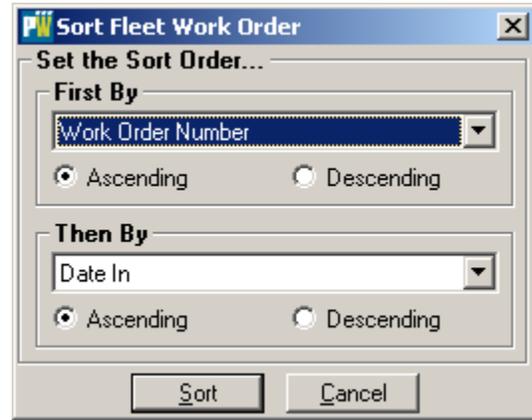
Values in the code drop-lists are in code order and they also possess a column for the code value and the corresponding name value. Values in the name drop-lists are in name order and they also possess a column for the corresponding code value.

Values, from either drop-list, can be selected by using the mouse or they can be selected by typing all or part of a value. Either way, when a selection is clicked or typed in a drop-list, its corresponding code or name is automatically selected.

When and Employee is selected, the employee's pay rates are automatically filled in.

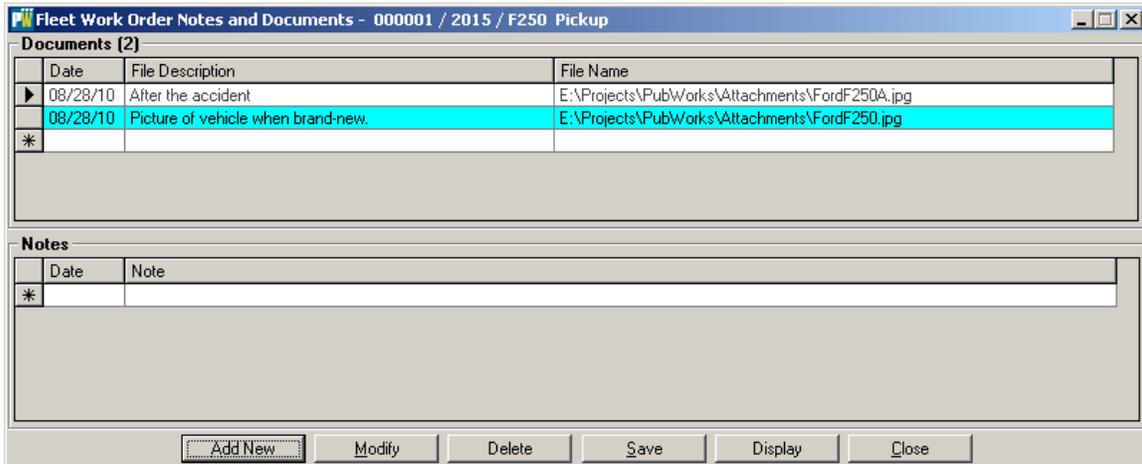
**Date Fields** – don't forget that the date field has an embedded calendar (double-click) and fills in a date in response to special key strokes: Y for yesterday, T for tomorrow, M for *manana*. Also, using the up/down arrow keys and/or the +/- keys you can scroll a date forward or backward in time.

Also, on the Work Order screen, date fields may or may NOT be automatically populated by PubWorks based on the fleet system setting "Automatically fill in date/time values on Work Order records".



**Sort Order** – the Sort button on the Button Bar allows you to arrange the Work Order records in whatever order you wish. The sort order you select will not interfere with the sort order of other users.

**More Button** – an easy way to add any document to the Work Order record. By document we mean photo, spreadsheet, movie, PDF, etc, etc.



## Work Order Status

Each Fleet Work Order in PubWorks comes with a check box indicating whether or not it has been complete. The Work Order Status screen gives you the ability to review all work orders in a straightforward listing and the data presented can be filtered using the radio button and drop list controls at the bottom of the window.

To summarize, this screen has the following capabilities and features:

- Complete/Incomplete/All Work Orders status filtering
- Week/Month/Quarter/Year/Life to date filtering
- Drop list filters Equipment, Department and Equipment Type
- “M” button for more or multi-item list filtering
- Summaries of parts, labor and total costs
- Column click sorting
- Double click Work Order locate
- Print displayed listing

WO#	Complete	PonD	Date In	Date Out	Eqp Code	Equipment Name	Odometer	Parts (\$)	Labor (\$)	Total (\$)
000007	<input type="checkbox"/>	<input type="checkbox"/>	01/30/09		1045	Dozer D-6	233	0.00	0.00	0.00
000022	<input type="checkbox"/>	<input type="checkbox"/>	04/19/09		1035	Trash Truck	4,500	167.97	18.75	186.72
000023	<input type="checkbox"/>	<input type="checkbox"/>	04/19/09		1038	Loader	45	89.99	25.00	114.99
000027	<input type="checkbox"/>	<input type="checkbox"/>	04/22/09		9008	Backhoe 580C	120	236.00	37.50	273.50
000028	<input type="checkbox"/>	<input type="checkbox"/>	07/01/09		2005	F250 Crew Cab	4,500	245.45	93.76	339.21
000030	<input type="checkbox"/>	<input type="checkbox"/>	01/22/10		1045	Dozer D-6	521	406.00	18.75	424.75
000031	<input type="checkbox"/>	<input type="checkbox"/>	01/22/10		9000	Police Cruiser	33,000	0.00	0.00	0.00
000032	<input type="checkbox"/>	<input type="checkbox"/>	02/04/10		1014	Motorgrader	375	409.85	25.00	434.85
000033	<input type="checkbox"/>	<input type="checkbox"/>	02/18/10		2345	Ford F350 Pickup	1,000	11.81	18.75	30.56
000035	<input type="checkbox"/>	<input type="checkbox"/>	02/25/10		1045	Dozer D-6	3,633	0.00	0.00	0.00
000036	<input type="checkbox"/>	<input type="checkbox"/>	12/31/09		1045	Dozer D-6	0	0.00	0.00	0.00
000037	<input type="checkbox"/>	<input type="checkbox"/>	03/02/10		2101	Ford F150	3,999	0.00	0.00	0.00
000038	<input type="checkbox"/>	<input type="checkbox"/>	03/24/10		9008	Backhoe 580C	125	55.00	18.75	73.75
000039	<input type="checkbox"/>	<input type="checkbox"/>	03/29/10		2005	F250 Crew Cab	5,600	319.92	36.26	356.18
000040	<input type="checkbox"/>	<input type="checkbox"/>	05/08/10		2005	F250 Crew Cab	7,500	0.00	36.26	36.26
000042	<input type="checkbox"/>	<input type="checkbox"/>	06/17/10		1014	Motorgrader	425	68.69	93.76	162.45
000043	<input type="checkbox"/>	<input type="checkbox"/>	06/21/10		1014	Motorgrader	500	400.24	36.26	436.50
000044	<input type="checkbox"/>	<input type="checkbox"/>	07/07/10		1001	F350 Pickup	13,000	108.92	72.52	181.44
000046	<input type="checkbox"/>	<input type="checkbox"/>	07/13/10		1099	Cat Dozer	151	113.00	25.00	138.00
000047	<input type="checkbox"/>	<input type="checkbox"/>	07/27/10		2015	F250 Pickup	5,788	43.69	311.08	354.77

20 Incomplete Fleet Work Orders - 1/1/1980 through 8/28/2010		2,676.53	867.40	3,543.93
--	--	----------	--------	----------

Completed  
  Incomplete  
  All Work Orders  
 Custom  
 Mon-to-Date  
 Qtr-to-Date  
 Yr-to-Date  
 Life-to-Date

For Equipment...  M  
 For Department...  M  
 For Equip Type...  M

## Creating a PM Schedule

This program feature is designed to generate a list of equipment due maintenance based on PM items. The screen comes with filters to limit the list by specific equipment item, equipment department, class or type. Furthermore, you can bracket the PM items based on the timeframe.

Once your timeframe and equipment filters are set, clicking the **Generate List** button will display a list of equipment and each PM item that is due for execution in the selected timeframe. This list can help you plan PM work.

Printing the list is based on the **Print** check box column. By default all grid items are checked but you can selectively check or uncheck any row in the grid. You can also use the **Set All Check** or **Clear all Checks** buttons to set or clear the check box in every row. The **Print List** button will print a list of PM items as they appear in the grid for those with rows where the **Print** check box is checked.

Print	Equipment Code	Equipment Name	PM Item	Last Odo	PM Odo	PM Date
<input checked="" type="checkbox"/>	1006	Ford Dump Truck	A Service	62,540		
<input checked="" type="checkbox"/>	1006	Ford Dump Truck	B Service	62,540		
<input checked="" type="checkbox"/>	1009	Curbside Collector/Recycler	Flush Hydraulic System	5,868		
<input checked="" type="checkbox"/>	1009	Curbside Collector/Recycler	Safety Inspection	5,868		
<input checked="" type="checkbox"/>	1010	Dump Truck with Plow	A Service	57,806		
<input checked="" type="checkbox"/>	1010	Dump Truck with Plow	B Service	57,806		
<input checked="" type="checkbox"/>	1010	Dump Truck with Plow	Brake Job	57,806		
<input checked="" type="checkbox"/>	1010	Dump Truck with Plow	Inspection	57,806		
<input checked="" type="checkbox"/>	1010	Dump Truck with Plow	Lube, Oil and Filter	57,806		
<input checked="" type="checkbox"/>	1010	Dump Truck with Plow	Tire Rotation	57,806		
<input checked="" type="checkbox"/>	1014	Motorgrader	Brake Job	53,345	375	02/04/10
<input checked="" type="checkbox"/>	1014	Motorgrader	cat 250	53,345		
<input checked="" type="checkbox"/>	1014	Motorgrader	cat 500	53,345	500	06/21/10
<input checked="" type="checkbox"/>	1014	Motorgrader	Flush Hydraulic System	53,345		
<input checked="" type="checkbox"/>	1014	Motorgrader	Safety Inspection	53,345		
<input checked="" type="checkbox"/>	1038	Loader	cat 250	13,789		
<input checked="" type="checkbox"/>	1038	Loader	cat 500	13,789		
<input checked="" type="checkbox"/>	1038	Loader	Electrical Inspection	13,789		
<input checked="" type="checkbox"/>	1038	Loader	Flush Hydraulic System	13,789		
<input checked="" type="checkbox"/>	1038	Loader	Flush Transmission	13,789		

Summary of controls and screen functions:

- The **Generate List** button will rerun the schedule based on the filtering and timeframe criteria selected at the top of the screen.
- The **Clear List** button will clear the displayed PM Schedule.
- Use the **Filtering Drop Lists** at the top of the screen to hone in just the equipment and/or PM items of interest and generate the schedule accordingly.
- Use the **Analysis Timeframe** (the default is *this week*) to look forward or backward in time or span a timeframe of any arbitrary size.
- Use the **Odometer Sources** check boxes to include or exclude odometer readings from their various sources within PubWorks.
- Use the **Set All Checks** and/or **Clear All Checks** buttons to create a listing report of PM Items to Service once you click the **Print List** button.

**Remember:** The PM items *worked on* are recorded in the Fleet Work Order Detail record – see page 29.

## Equipment Rate Calculator

This program feature is designed to calculate usage rates for the equipment in your fleet. The calculation is based on the cost of maintenance performed (past, labors and contractor services) plus any depreciation plus any values you wish to enter in a category called "other."

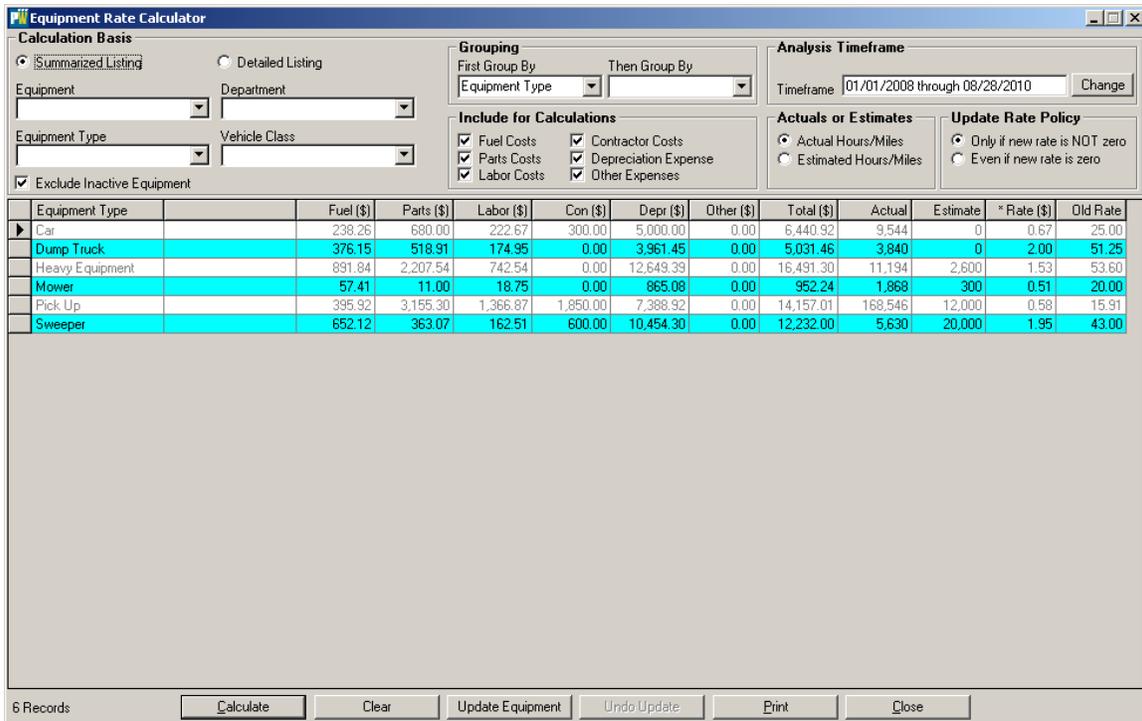
Additionally, the calculation is based on either actual use or estimated use of each vehicle in your fleet. These values for actual use come from odometer entries in the Odometer Log and Work Orders and Daily Activities. Estimated use values come from entries made on the Equipment Screens

A new usage rate is calculated by dividing cost by usage producing a **dollars per mile** or **dollars per hour** value.

You can control how this calculation is executed by setting or checking various cost component check boxes, date filters and whether actual or estimated usage is the factor. You can also key values directly into the **Other** column as well as the **Hrs Est** (estimated hours of actual use) column.

Clicking the **Calculate** button will calculate new rates for the listed equipment based on your calculation parameters and place the new rates in the **Rate** column.

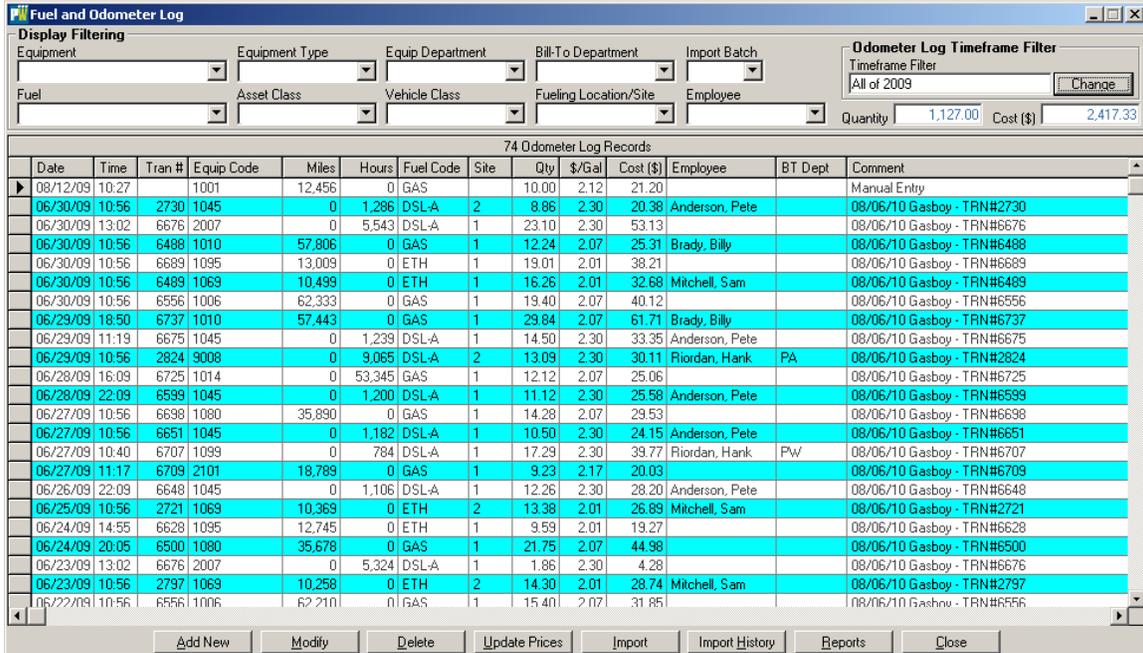
Calculations can be run any number of times until you are satisfied with the results. If you are satisfied with the results you can update all listed equipment with the new rates by clicking the **Update Equipment** button.



Equipment Type	Fuel (\$)	Parts (\$)	Labor (\$)	Con (\$)	Depr (\$)	Other (\$)	Total (\$)	Actual	Estimate	* Rate (\$)	Old Rate
Car	238.26	680.00	222.67	300.00	5,000.00	0.00	6,440.92	9,544	0	0.67	25.00
Dump Truck	376.15	518.91	174.95	0.00	3,961.45	0.00	5,031.46	3,840	0	2.00	51.25
Heavy Equipment	891.84	2,207.54	742.54	0.00	12,649.39	0.00	16,491.30	11,194	2,600	1.53	53.60
Mower	57.41	11.00	18.75	0.00	865.08	0.00	952.24	1,868	300	0.51	20.00
Pick Up	395.92	3,155.30	1,366.87	1,850.00	7,388.92	0.00	14,157.01	168,546	12,000	0.58	15.91
Sweeper	652.12	363.07	162.51	600.00	10,454.30	0.00	12,232.00	5,630	20,000	1.95	43.00

## Fuel and Odometer Log

The Fuel and Odometer Log provides a means to record the miles or hours on a vehicle's odometer without having to create a Fleet Work Order or Daily Activity record. When viewing the Fuel and Odometer Log, drop list filters can be used limit the data appearing in the grid



**Fuel and Odometer Log**

Display Filtering

Equipment: [ ] Equipment Type: [ ] Equip Department: [ ] Bill-To Department: [ ] Import Batch: [ ]

Fuel: [ ] Asset Class: [ ] Vehicle Class: [ ] Fueling Location/Site: [ ] Employee: [ ]

Odometer Log Timeframe Filter  
Timeframe Filter: All of 2009 [Change]

Quantity: 1,127.00 Cost (\$): 2,417.33

74 Odometer Log Records

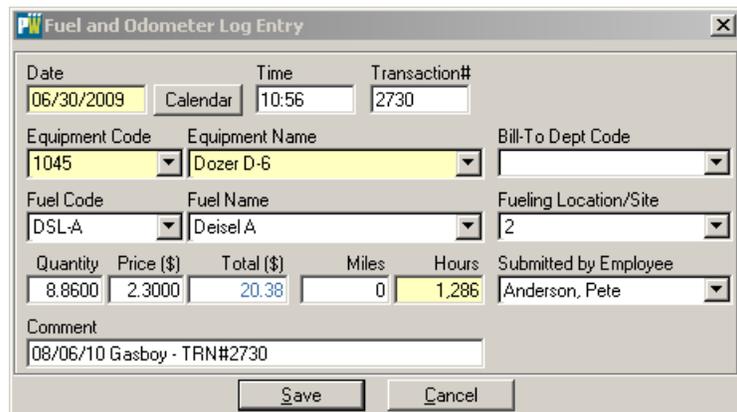
Date	Time	Tran #	Equip Code	Miles	Hours	Fuel Code	Site	Qty	\$/Gal	Cost (\$)	Employee	BT Dept	Comment
08/12/09	10:27		1001	12,456	0	GAS		10.00	2.12	21.20			Manual Entry
06/30/09	10:56	2730	1045	0	1,286	DSL-A	2	8.86	2.30	20.38	Anderson, Pete		08/06/10 Gasboy - TRN#2730
06/30/09	13:02	6676	2007	0	5,543	DSL-A	1	23.10	2.30	53.13			08/06/10 Gasboy - TRN#6676
06/30/09	10:56	6488	1010	57,806	0	GAS	1	12.24	2.07	25.31	Brady, Billy		08/06/10 Gasboy - TRN#6488
06/30/09	10:56	6689	1095	13,009	0	ETH	1	19.01	2.01	38.21			08/06/10 Gasboy - TRN#6689
06/30/09	10:56	6489	1069	10,499	0	ETH	1	16.26	2.01	32.68	Mitchell, Sam		08/06/10 Gasboy - TRN#6489
06/30/09	10:56	6656	1006	62,333	0	GAS	1	19.40	2.07	40.12			08/06/10 Gasboy - TRN#6656
06/29/09	18:50	6737	1010	57,443	0	GAS	1	29.84	2.07	61.71	Brady, Billy		08/06/10 Gasboy - TRN#6737
06/29/09	11:19	6675	1045	0	1,239	DSL-A	1	14.50	2.30	33.35	Anderson, Pete		08/06/10 Gasboy - TRN#6675
06/29/09	10:56	2824	9008	0	9,065	DSL-A	2	13.09	2.30	30.11	Riordan, Hank	PA	08/06/10 Gasboy - TRN#2824
06/28/09	16:09	6725	1014	0	53,345	GAS	1	12.12	2.07	25.06			08/06/10 Gasboy - TRN#6725
06/28/09	22:09	6599	1045	0	1,200	DSL-A	1	11.12	2.30	25.58	Anderson, Pete		08/06/10 Gasboy - TRN#6599
06/27/09	10:56	6698	1080	35,890	0	GAS	1	14.28	2.07	29.53			08/06/10 Gasboy - TRN#6698
06/27/09	10:56	6651	1045	0	1,182	DSL-A	1	10.50	2.30	24.15	Anderson, Pete		08/06/10 Gasboy - TRN#6651
06/27/09	10:40	6707	1099	0	784	DSL-A	1	17.29	2.30	39.77	Riordan, Hank	PW	08/06/10 Gasboy - TRN#6707
06/27/09	11:17	6709	2101	18,789	0	GAS	1	9.23	2.17	20.03			08/06/10 Gasboy - TRN#6709
06/26/09	22:09	6648	1045	0	1,106	DSL-A	1	12.26	2.30	28.20	Anderson, Pete		08/06/10 Gasboy - TRN#6648
06/25/09	10:56	2721	1069	10,369	0	ETH	2	13.38	2.01	26.89	Mitchell, Sam		08/06/10 Gasboy - TRN#2721
06/24/09	14:55	6628	1095	12,745	0	ETH	1	9.59	2.01	19.27			08/06/10 Gasboy - TRN#6628
06/24/09	20:05	6500	1080	35,678	0	GAS	1	21.75	2.07	44.98			08/06/10 Gasboy - TRN#6500
06/23/09	13:02	6676	2007	0	5,324	DSL-A	1	1.86	2.30	4.28			08/06/10 Gasboy - TRN#6676
06/23/09	10:56	2797	1069	10,258	0	ETH	2	14.30	2.01	28.74	Mitchell, Sam		08/06/10 Gasboy - TRN#2797
06/22/09	10:56	6656	1006	62,210	0	GAS	1	15.40	2.07	31.85			08/06/10 Gasboy - TRN#6656

Buttons: Add New, Modify, Delete, Update Prices, Import, Import History, Reports, Close

Fuel and Odometer Log records can be added by clicking the **Add New** button. The screen below requires a date (filled in automatically with today's date) an equipment entry and a value for either hours or miles. The employee submitting or entering the odometer values can be enter along with a 64 character comment.

**Modifying** an existing odometer log record is done by selecting a row in the grid and clicking the **Modify** button, or simply by double-clicking a row on the grid

Click the **Delete** button will delete the selected row or click the **Print** button to print a listing of the Odometer Log values displayed in the grid.



**Fuel and Odometer Log Entry**

Date: 06/30/2009 [Calendar] Time: 10:56 Transaction#: 2730

Equipment Code: 1045 Equipment Name: Dozer D-6 Bill-To Dept Code: [ ]

Fuel Code: DSL-A Fuel Name: Deisel A Fueling Location/Site: 2

Quantity: 8.8600 Price (\$): 2.3000 Total (\$): 20.38 Miles: 0 Hours: 1,286 Submitted by Employee: Anderson, Pete

Comment: 08/06/10 Gasboy - TRN#2730

Buttons: Save, Cancel

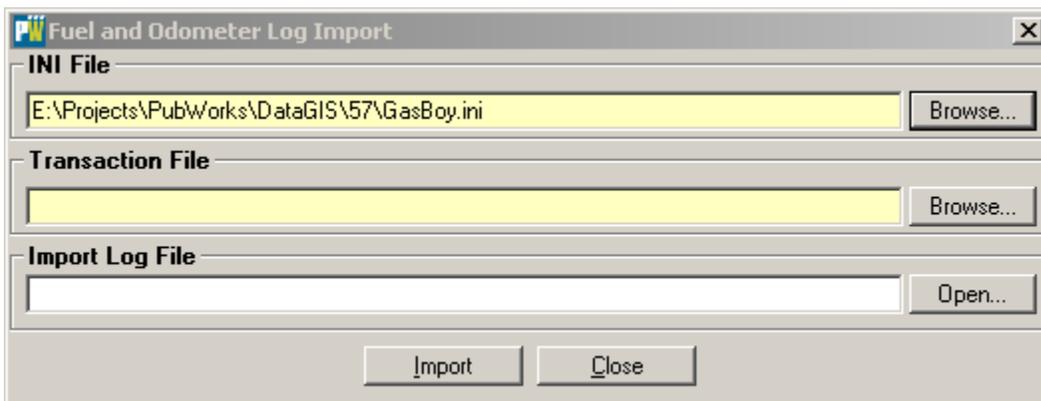
**Updating Prices**

Often is the case where price per gallon for fuel must be updated after an import has occurred. You can solve this problem easily by clicking the **Update Prices** button at the bottom of the screen and entering a per-gallon fuel price.

**Be Careful!** This will update the price for each displayed transaction so be sure to select the right set of transactions (using the drop list and timeframe filters at the top of the screen).

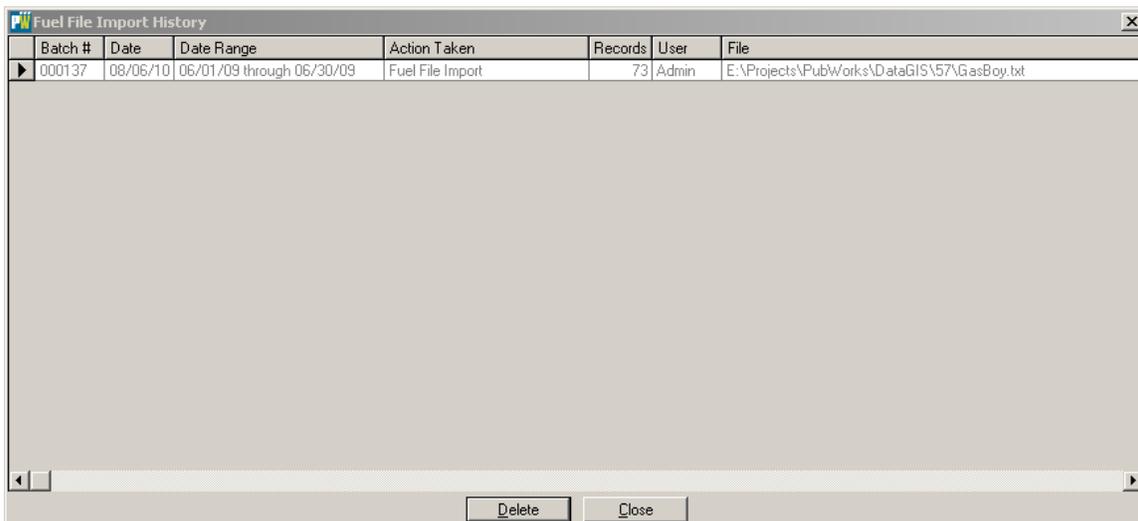
**Importing Fuel System Records**

Clicking the Import button will present you with a screen that asks you to specify the PubWorks fuel import INI file (created custom for your installation) and a fueling system transaction file. This INI file describes the layout of the data in the transaction file.



Clicking the **Import** button on the import screen cause **PubWorks** to read the transaction file, create fueling records for each piece of equipment found and deduct fuel quantities from your inventory items that correspond to the fuel used.

A history of prior imports can be viewed by clicking the **Import History** button. A screen is displayed show all import events. If you wish, you can completely delete all transaction associated with a record in the import history listing.



## Fuel and Odometer Log Reports

A wide variety of reports is available giving you the ability to analyze fuel consumption in very detailed and flexible ways. Clicking the Reports button on the Fuel and Odometer Log screen, you will be presented with the reporting screen below.

**Fuel and Odometer Log Reports**

**Report Type**

- Listing Grouped by Equipment
- Listing Grouped by Equipment Department
- Listing Grouped by Equipment Type
- Listing Grouped by Vehicle Class
- Listing Grouped by Asset Class
- Summary
- MPG
- Listing by Date
- Listing Grouped by Fuel
- Listing Grouped by Bill-To Department
- Listing Grouped by Fueling Location/Site
- Listing Grouped by Employee
- Latest Odometer Readings

**Equipment Filtering**

**Equipment**  M  Exclude

Equip Type  M  Exclude Veh Class  M  Exclude

Department  M  Exclude Asset Class  M  Exclude

Make Model

**Fuel**

Fuel  M  Exclude

Bill-To Department  M  Exclude

Fueling Location/Site  M  Exclude

Employee  M  Exclude

**Date Filtering**

Any Dates Start Date 01/01/2009 Calendar End Date 12/31/2009 Calendar

By Month 2010

By Quarter 2010

By Year 2010

OK Close

Make a report choice via the radio buttons at the top of the screen, then filter based on equipment or equipment attributes. Also use the date filtering controls to select just the fueling transactions that are of interest to you. Click OK and **PubWorks** will display your report in a print preview window.

Are we missing any reports you need? If so please tell us! Send us an email (to [support@PubWorks.com](mailto:support@PubWorks.com)) or phone us. Adding reports to **PubWorks** is a mutually beneficial effort.

## Fleet Program Settings

Program-wide settings are available to enhance the process of Work Order data entry.

Default settings for Shop, Task, Maintenance Category and Shop Locations can be established from your pre-existing sets of these data items and **PubWorks** will automatically fill these values in to all new Work Orders.

Note: The Fuel Material Type setting is required to help drive the Fuel and Odometer log so **PubWorks** can differential fuels from other items in your material/parts inventory.

You can also ask **PubWorks** to ...

- Require an odometer reading for each Work Order (either when you create the Works Order or when you render it complete)
- Require a Shop Location for each Work Order Detail record.
- Warn you if already existing Work Orders exist for the vehicle for which a new Work Order is being created.
- Automatically fill in date/time values on Work Order records.
- Automatically use the logged in employee as the mechanic for newly created Work Orders.
- Use the labor rate associated with the equipment/vehicle instead of the employee labor rate (if present).
- Transform vehicle component and maintenance category into as VMRS system on the Work Order Detail screen.
- Allow free-form labor hours and cost data entry.
- Allow Work Order Detail records to be saved without a specified employee or contractor.
- Allow or disallow parts inventory quantities on hand from going negative.
- Allow non-stock parts to not have their quantity on hand values updated based on usage always keeping the quantity on hand equal to zero.
- Determine the placement of Work Order notes

**Fleet Settings**

**Defaults**

Default Shop Task: Fix and or Repair

Maintenance Category: Routine

Fuel Material Type: Fuel

Shop Location: |

**Work Order Settings**

Require Odometer Reading

When Created

When Completed

Require Shop Location

Require Environmental Fee

Warn on Existing Incomplete Work Orders

Warn on More Recent Existing Works Orders

Auto-Fill Date and Time Fields with PC's Current Date

Use Logged In Employee as Default on Work Orders

Use Equipment Labor Rate Instead of Employee Rate

VMRS (Maintenance Category/Vehicle Component)

Allow Labor with out Calculation

Allow Detail Record with No Employee/Contractor

Allow Negative Inventory Quantities

Non-Stock Items Quantity-on-Hand Always Zero

Update Calculated Equipment Rates Even if Zero

**Work Order Notes**

On Separate Screen    After Employees

After Header            On Bottom of Screen

OK    Apply    Cancel

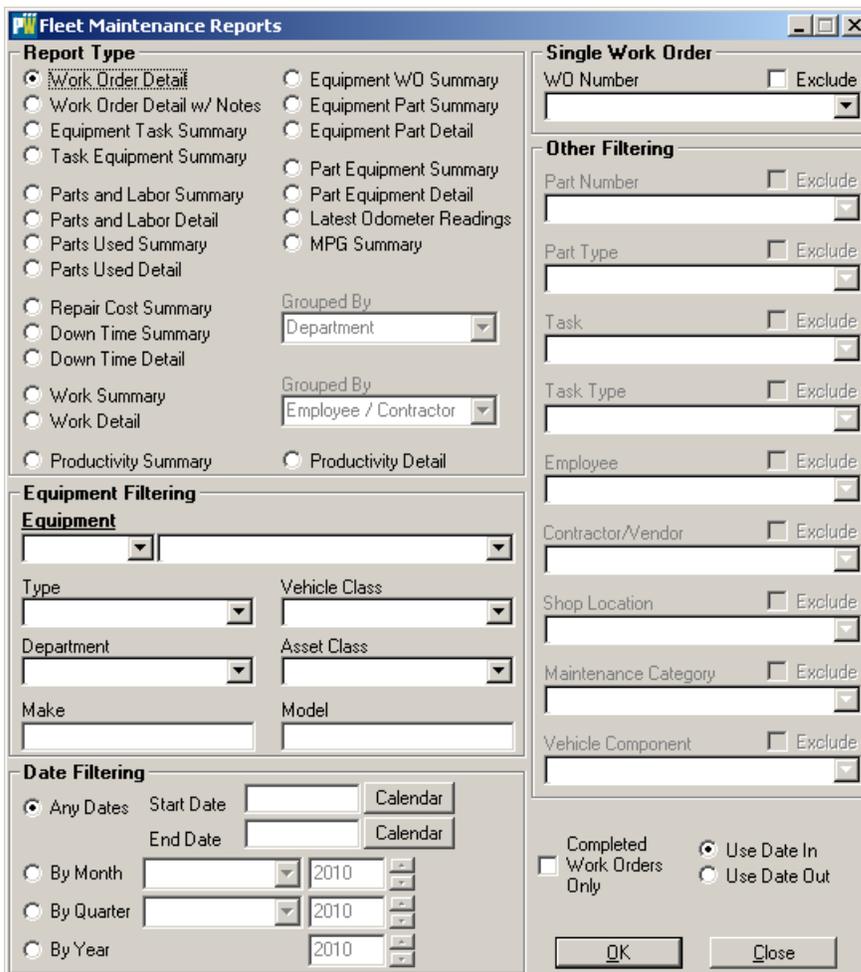
## Fleet Maintenance Reports

A wide variety of cost reports exist to help you analyze the cost of equipment maintenance.

- Report type selection – a series of radio buttons permit selection of the type of report desired
- Equipment filtering – select a single piece of equipment or equipment based on their category data attributes (type, department, class)
- Date filtering – select a date, date range, entire month, quarter or year
- Other filtering – limit report data to only include a certain Work Order, task, employee, contractor, shop, maintenance category or vehicle component.

If too much filtering is applied, thereby providing the report with no data, **PubWorks** will notify you of such a situation.

All reports are displayed in a print preview window and all cost reports possess a legend documenting the filtering that was applied to the report.



**Fleet Maintenance Reports**

**Report Type**

- Work Order Detail
- Work Order Detail w/ Notes
- Equipment Task Summary
- Task Equipment Summary
- Parts and Labor Summary
- Parts and Labor Detail
- Parts Used Summary
- Parts Used Detail
- Repair Cost Summary
- Down Time Summary
- Down Time Detail
- Work Summary
- Work Detail
- Productivity Summary
- Productivity Detail
- Equipment WO Summary
- Equipment Part Summary
- Equipment Part Detail
- Part Equipment Summary
- Part Equipment Detail
- Latest Odometer Readings
- MPG Summary

**Equipment Filtering**

**Equipment**

Equipment: [Dropdown] [Dropdown]

Type: [Dropdown] Vehicle Class: [Dropdown]

Department: [Dropdown] Asset Class: [Dropdown]

Make: [Dropdown] Model: [Dropdown]

**Date Filtering**

Any Dates Start Date: [Text] [Calendar] End Date: [Text] [Calendar]

By Month [Dropdown] 2010 [Dropdown]

By Quarter [Dropdown] 2010 [Dropdown]

By Year 2010 [Dropdown]

**Single Work Order**

WO Number: [Dropdown]  Exclude

**Other Filtering**

Part Number: [Dropdown]  Exclude

Part Type: [Dropdown]  Exclude

Task: [Dropdown]  Exclude

Task Type: [Dropdown]  Exclude

Employee: [Dropdown]  Exclude

Contractor/Vendor: [Dropdown]  Exclude

Shop Location: [Dropdown]  Exclude

Maintenance Category: [Dropdown]  Exclude

Vehicle Component: [Dropdown]  Exclude

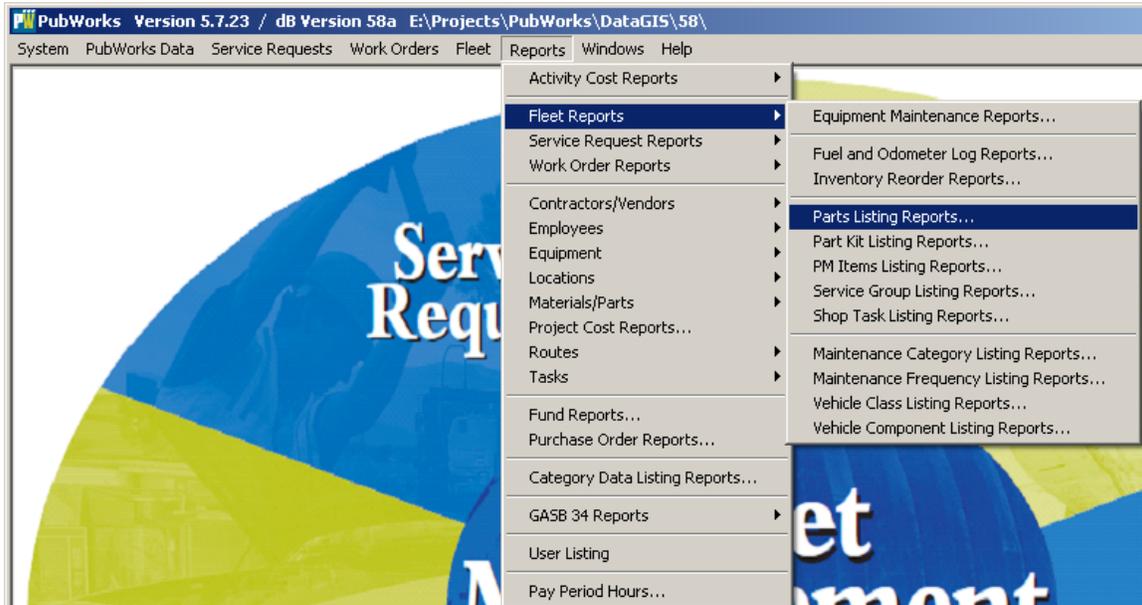
Completed Work Orders Only  Use Date In  Use Date Out

[OK] [Close]

Are we missing any reports you need? If so please tell us! Send us an email (to [support@PubWorks.com](mailto:support@PubWorks.com)) or phone us. Adding reports to **PubWorks** is a mutually beneficial effort.

## Fleet Listing Reports

Listing reports are simple and straightforward listings of each record that resides in each of the **PubWorks** data tables. Listing reports exist for contractors, employees, equipment, locations, materials, routes, tasks and all category data items. Listing reports can be printed in either code or name order and can be grouped by category.



## Fleet Training Guide Index

Adding Documents	33
Adding PM Items	30
Adding Work Orders	30
Adding/Modifying Service Group Tasks	26
Adding/Returning/Transferring Parts Inventory	21
Associated Equipment (to a PM Item)	7
Associating PM Items to Equipment	8
Creating a PM Schedule	35
Database Hierarchy	2
Dates Fields	33
Deleting PM Items	6
Equipment	10
Equipment Activity Log	14
Equipment Depreciation Schedule	11
Equipment Fleet Work Order Log	13
Equipment List View	15
Equipment Odometer Log	12
Equipment Rate Calculator	36
Fleet Category Data	3
Fleet Listing Reports	42
Fleet Maintenance Reports	41
Fleet Program Settings	40
Fleet Work Orders	28
Fuel and Odometer Log	37
Fuel and Odometer Log Updating Prices	38
General Program and Database Organization	2
Importing Fuel System Records	38
Maintenance Frequencies	4
Modifying Existing PM Items	6
Part Kit List View	23
Part Kits	22
Parts Fleet Work Order Log	20
Parts Inventory	19
Parts Transaction Log	20
PM History	9
Preventative Maintenance Items	5
Printing PM Items	6
Saving the Detail Record	31
Service Group List View	27
Service Groups	26
Shop Tasks	24
Sort Order	33
Specs: Preventative Maintenance Items	16
Specs: Required Parts and Notes	18
Table of Contents	1
Task Description	25
Task List View	25
Work Order Detail	29
Work Order Notes	32
Work Orders: Special Considerations	32