

PubWorks Work Order Module

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How to Setup Work Orders

Inspection, Replacement and Maintenance

Overview

Work Orders in PubWorks is an optional module that fits a number of situations:

1. Recurring tasks, such as an annual inspection or replacement of an item every three years.
2. Performing a task on a large number of assets in a single job, such as selecting all the signs in a particular district, or of a certain type, that need to be replaced all together.
3. Adding a number of Service Requests to a job.
4. Setting-up one time jobs to be done in the future.

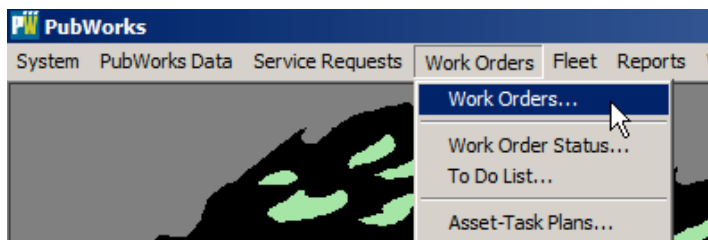
There are two important requirements to remember when using PubWorks Work Orders:

1. Unlike Service Requests, where actual work performed is entered with an activity record; Work Orders have **both** the work and resources recorded with the Work Order Record. You **do not** enter work performed on a Work Order in an Activity; **the Work Order takes the place of an Activity for capturing costs.**

2. **A Work Order is not an ad hoc entry done on-the-fly. Work orders can only be setup when pre-defined assets and tasks have been linked to create work orders.**

A common use of Work Orders is the tracking of sign installations or sign inspections for fulfilling sign retroreflectivity standards. The following example tracks signs, however you can setup Work Orders to track any scheduled event.

Note: Make sure that you have the PubWorks “Work Order” module and that it is turned on. If you need to purchase the module, or need to have it turned on, please contact us.



Make sure that the Work Orders tab at the top of PubWorks is highlighted. You must have purchased the work order module **and** the module must be turned on in the user setup.

The following steps must be done prior to tracking your assets:

1. **Create the assets** (if not already done)
2. **Create the task** (if not already done)
3. **Setup a Plan** - Link the assets with the task to create a Work Order

NOTE: A Plan must be setup before you can create a Work Order – you cannot just enter a Work Order on-the-fly if there is no plan established.

4. For recurring items, such as an annual inspection, make sure that you **initiate the process by performing the trigger task on each asset**. For example, you will need to enter the install date for a sign, if an installation triggers a 10-year replacement schedule. Otherwise, the software doesn't know when to start counting.
5. **Generate your To Do List**
6. **Setup Work Order criteria** such as frequency and batches
7. **Generate the Work Order List**

Create the assets

Define the asset that you want to maintain. In this example you are going to **replace all Type 3 signs every 10 years**. You need to make sure that you have the Type 3 signs in your list of location features.

In the following example, all our Type 3 signs are the same material and with the same replacement schedule.

Location Features (Sign Type 3 10YR) - Stop Sign 100 / Sign100

General Information: GASB 34, Plan (2), Activity Log, List View

Feature Code: Sign100, Record Active: ☒ District: South West

Feature Name: Stop Sign 100, Asset Class: Traffic Control

Feature Type: Sign Type 3 10YR, Fund:

Location Code: 253, Latitude: 40.028407380059, Acquisition Date:

Location Name: Melville Ln, Longitude: -74.8818024613503, Disposal Date:

Segment: , External Code:

Notes:

Metrics: Length, Width, Height, ROW, Left Shoulder, Right Shoulder, Begin Mile Post, End Mile Post, Side, Length (Miles), Square Feet, Square Yards, Square Meters

Custom Attributes: Attributes (15), More Attributes (10)

Attributes (15): Height (in), Width (in), Area (sq in), Qty Of Supports, Signs On Support, Installation Date, Replacement Date, Last Inspection Date, Fabrication Date, Manufacturer, Sign Type, Sheetting Material, Blank Material, Extruded Blank, Support Type, Breakaway Type

Record: 1 of 301 | Sign100 | Stop Sign 100 | Melville Ln | Active: Yes

Note: You can search for groups of assets by attributes, districts and MUTCD. This is a very powerful and useful feature. With this lookup table (Work Orders>Asset Search) you can find all signs of a certain type with certain attributes.

The MUTCD feature is automatically turned on if you select the “Is Sign” checkbox in the Location Feature Type category data list.

District	Location Type	Location Code	Location Name	Feature Type	Mutcd	MutcdVarInfo	Feature Code	Feature Name	Address
North West	Street	37	Brocklow Dr	Sign Prismatic	R1-1		Sign11	Stop Sign 11	
North West	Street	13	Beechlem Ln	Sign Prismatic	R1-1		Sign13	Stop Sign 13	
North West	Street	46	Buttercup Ln	Sign Prismatic	R1-1		Sign15	Stop Sign 15	
North West	Street	12	Beaverdale Ln	Sign Prismatic	R1-1		Sign17	Stop Sign 17	
North West	Street	22	Birchwood Ln	Sign Prismatic	R1-1		Sign19	Stop Sign 19	
North West	Street	40	Buckingham Dr	Sign Prismatic	R1-1		Sign21	Stop Sign 21	
North West	Street	40	Buckingham Dr	Sign Prismatic	R1-1		Sign23	Stop Sign 23	

Create the task

Define the task which will trigger the desired scheduled action. In this case, the task of “sign installation” will trigger a replacement in 10 years, assuming that the material has a warranty of 10 years. **Anytime we perform a “sign installation” on a particular sign, it will create a new 10 year replacement period.** So if a sign is damaged and is re-installed, a new 10 year period will begin with the replacement date.

General Information

Task Code: 114 Record Active: ☒

Task Name: Sign Installation

Task Type: Sign Management

Ext Code:

Unit Cost Accounting Settings

Requires Units: ☐

Unit Type:

Total Cost: MTD: 0.00 QTD: 0.00 YTD: 772.41 LTD: 427,915.20

Prod Units: MTD: 0 QTD: 0 YTD: 0 LTD: 0

\$ / Unit: MTD: 0.00 QTD: 0.00 YTD: 0.00 LTD: 0.00

Field Task: ☒ Standard Hours:

Shop Task: ☐

Activities Require/Allow

Employee: ☐ Fund: ☐ Zero Emp Hours: ☐

Contractor: ☐ Project: ☐ Force 0 Eq Hr/Mi: ☐

Equipment: ☐ Service: ☐ Force 0 Eq Rate: ☐

Materials: ☐ Request: ☐

Overhead, GASB, GIS

Include in Overhead Allocations: ☒

Include in GIS Export Filtering: ☒

Record: 46 of 58 | 114 | Sign Installation | Active: Yes

Create the Work Order Plan - Link assets with the task

Note: Every Work Order must have a pre-defined plan!

So what exactly is a plan? Some examples:

All prismatic signs must be replaced every 10 years

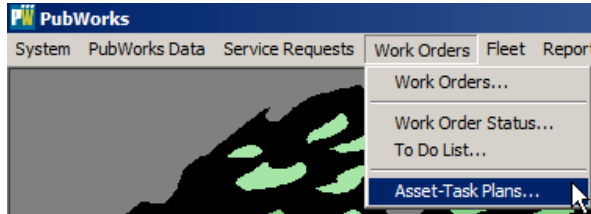
Every sign needs to be inspected once a year

Every culvert in the Middle River watershed needs to be cleaned once a year

In 2016 the Muffin Master needs a complete overhaul by a certified technician

First, tie the asset and the action together.

- a. Go to Work Orders>Asset-Task Plans



- b. Select the asset type that you want and the task that you need to perform.
- c. Select the frequency and time period
- d. Create a Default Result for a Task

When you have a large number of items on your “To Do List” it is easier to create a default result and then make any changes to the norm. OK is the most frequent default value. This feature will come in handy when you complete a work order.

Task Completion Results			Follow-Up Done		
Result	Default	Follow-Up Task *	Immediate	After	Active
OK	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PARTIAL	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Now “Save” the task plan. Notice that before saving the plan (above) the tab for Assets has no asterisk.

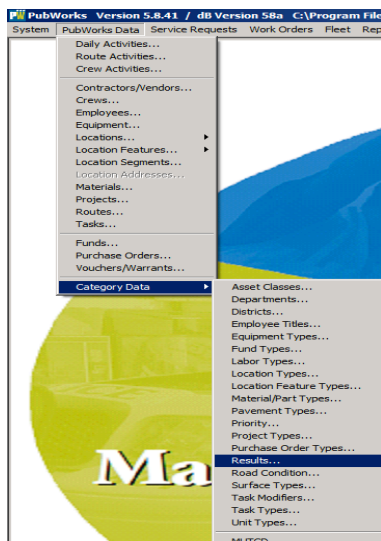
After saving the plan, the tab for Assets has an asterisk. The asterisk in PubWorks means that there is something in that tab...in this case the assets in PubWorks that meet the criteria of the To Do Plan.

Location	Feature	O/D	Last Done	Next Plan	Scheduled	Active
Babbitt Ln	Stop Sign 14		09/02/10	09/02/20		<input checked="" type="checkbox"/>
Babcock Ln	Stop Sign 40		07/21/08	07/21/18		<input checked="" type="checkbox"/>
Baldwin Ln	Stop Sign 459		08/26/09	08/26/19	08/21/09	<input checked="" type="checkbox"/>
Balfour Ln	Stop Sign 451		08/03/07	08/03/17	08/21/09	<input checked="" type="checkbox"/>
Balfour Ln	Stop Sign 453		02/11/08	02/11/18		<input checked="" type="checkbox"/>
Barnwell Dr	Stop Sign 35		07/21/08	07/21/18		<input checked="" type="checkbox"/>
Barnwell Dr	Stop Sign 548		08/10/07	08/10/17	08/21/09	<input checked="" type="checkbox"/>
Barrington Ln	Stop Sign 390		02/06/08	02/06/18		<input checked="" type="checkbox"/>
Barrington Ln	Stop Sign 391		07/31/07	07/31/17	08/21/09	<input checked="" type="checkbox"/>
Barrington Ln	Stop Sign 392		07/31/07	07/31/17	08/21/09	<input checked="" type="checkbox"/>
Barrington Ln	Stop Sign 393		02/06/08	02/06/18		<input checked="" type="checkbox"/>
Barrington Ln	Stop Sign 394		02/06/08	02/06/18		<input checked="" type="checkbox"/>
Barrington Ln	Stop Sign 395		07/31/07	07/31/17	08/21/09	<input checked="" type="checkbox"/>
Bartlett Ln	Stop Sign 9		01/10/08	01/10/18	08/21/09	<input checked="" type="checkbox"/>
Bayberry Ln	Stop Sign 37		01/11/08	01/11/18	08/21/09	<input checked="" type="checkbox"/>
Bayberry Ln	Stop Sign 38		01/11/08	01/11/18	08/21/09	<input checked="" type="checkbox"/>
Bayberry Ln	Stop Sign 39		07/21/08	07/21/18		<input checked="" type="checkbox"/>
Bayberry Ln	Stop Sign 41		01/11/08	01/11/18	08/21/09	<input checked="" type="checkbox"/>
Bayberry Ln	Stop Sign 42		01/11/08	01/11/18	08/21/09	<input checked="" type="checkbox"/>
Beaverdale Ln	Stop Sign 17		01/10/08	01/10/18	08/21/09	<input checked="" type="checkbox"/>
Beechfern Ln	Stop Sign 13		01/10/08	01/10/18	08/21/09	<input checked="" type="checkbox"/>
Beechnut Ln	Stop Sign 265		01/29/08	01/29/18	08/21/09	<input checked="" type="checkbox"/>
Bermuda Cir	Stop Sign 32 Maple Street cmr Johr		01/09/08	01/09/18	08/21/09	<input checked="" type="checkbox"/>
Beverly Rancocas Rd	Stop Sign 348		07/27/07	07/27/17	08/21/09	<input checked="" type="checkbox"/>
Beverly Rancocas Rd	Stop Sign 350		02/04/08	02/04/18		<input checked="" type="checkbox"/>

Record: 16 of 22 Sign Installation Sign Type 3 10YR Active: Yes

Creating Alternative Results

The results are where you setup possible outcomes. For example, it is OK, Broken, Partially Complete, etc.



Code	Name	Active
ACCIDENT	Accident	<input checked="" type="checkbox"/>
FADED	Faded	<input checked="" type="checkbox"/>
Blockage	Major Blockage Fixed	<input checked="" type="checkbox"/>
MajorRepair	Major Repair Reschedule	<input checked="" type="checkbox"/>
MinorRepair	Minor Repair Fixed	<input checked="" type="checkbox"/>
OK	OK	<input checked="" type="checkbox"/>
PARTIAL	Partially Complete	<input checked="" type="checkbox"/>
STOLEN	Stolen	<input checked="" type="checkbox"/>
VANDAL	Vandalism	<input checked="" type="checkbox"/>
*		<input type="checkbox"/>

Results: 9

Save Delete Print Close

You also have the option to create a Follow-Up Task for a specific Result. For example, the following inspection of a culvert says

“if minor repair is needed, do the repairs immediately and the task is Culvert Repair ”

“if major repair is needed, schedule a task for Culvert Repair at a later date”

Result	Default	Follow-Up Task	Immediate	After	Active
OK	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Blockage	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MajorRepair	<input type="checkbox"/>	Culvert Repair	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MinorRepair	<input type="checkbox"/>	Culvert Repair	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PARTIAL	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Selecting a follow-up of “Immediate” or “After” does the following:

Immediate follow-up will say that the work for that asset has been completed and is now off of the to-do list.

After means that some work is not done. So the asset will remain on the Work Order’s to-do list along with the “Follow-Up Task” selected.

Initialization of Schedule

Note: Before you can run a report that lists when signs need to be replaced, you must input the original date of the triggering task. In this case “sign installation,” was performed.

An easy way to find out which assets need to be initialized is to run the “To Do List” for a particular asset with **all dates included for the timeframe**.

Print a report and any asset that doesn’t have a “Last Done” date needs to be performed.

To Do List

Search Criteria

Feature Type: District: Planned Timeframe:

Location Type: Location Code / Name:

Task Type: Task Code / Name:

Work Items [604]

	Location Name	Feature Name	Task Name	O/D	Last Done	Planned	Scheduled	In WD
<input type="checkbox"/>	Gramercy Ln	Stop Sign 208	Sign Installation		07/18/07	07/18/17	08/21/09	17
<input checked="" type="checkbox"/>	Gamer Ln	Stop Sign 212	Sign Installation		07/18/07	07/18/17	08/21/09	17
<input type="checkbox"/>	Gallant Ln	Stop Sign 216	Sign Installation		07/18/07	07/18/17	08/21/09	17
<input checked="" type="checkbox"/>	Montrose Ln	Stop Sign 189	Sign Inspection	*	07/17/07	01/17/09		
<input type="checkbox"/>	Manor Ln	Stop Sign 181	Sign Inspection	*	07/17/07	01/17/09		
<input checked="" type="checkbox"/>	Woodhaven Ln	Stop Sign 310	Sign Inspection					
<input type="checkbox"/>	Windsor Ln	Stop Sign 312	Sign Inspection					
<input type="checkbox"/>	Windsor Ln	Stop Sign 314	Sign Inspection					
<input type="checkbox"/>	Windsor Ln	Stop Sign 316	Sign Inspection					
<input checked="" type="checkbox"/>	Windsor Ln	Stop Sign 308	Sign Inspection					
<input type="checkbox"/>	Van Sciver Pkwy	Stop Sign 458	Sign Inspection					
<input checked="" type="checkbox"/>	Van Sciver Pkwy	Stop Sign 452	Sign Inspection					
<input type="checkbox"/>	Tyler Dr	Stop Sign 256	Sign Inspection					
<input checked="" type="checkbox"/>	Twisting Ln	Stop Sign 286	Sign Inspection					
<input type="checkbox"/>	Twin Hill Dr	Stop Sign 278	Sign Inspection					
<input checked="" type="checkbox"/>	Twin Hill Dr	Stop Sign 236	Sign Inspection					
<input type="checkbox"/>	Twin Hill Dr	Stop Sign 248	Sign Inspection					

138 Locations 302 Features 2 Tasks

Town of Hanover

Work Order To Do List

The assets highlighted in yellow do not have an original installation date, so one will need to be added.

Location	Feature	Task	Last Done	Planned	Scheduled
Bermuda Cir	Sign1	Sign Inspection	07/17/2008	01/17/2010	
Bradford Ln	Sign2	Sign Inspection			
Bradford Ln	Sign3	Sign Inspection	07/30/2009	01/30/2011	
Shelbourne Ln	Sign4	Sign Inspection			
Summit Ln	Sign5	Sign Inspection	07/17/2008	01/17/2010	
Sunset Rd	Sign6	Sign Inspection			
Bradford Ln	Sign7	Sign Inspection	07/30/2009	01/30/2011	
Sheffield Dr	Sign8	Sign Inspection			
Bartlett Ln	Sign9	Sign Inspection	08/06/2008	02/06/2010	
Brooklawn Dr	Sign11	Sign Inspection	07/30/2009	01/30/2011	
Bnierdale Ln	Sign12	Sign Inspection			
Beechfern Ln	Sign13	Sign Inspection	07/18/2008	01/18/2010	
Babbitt Ln	Sign14	Sign Inspection			
Buttercup Ln	Sign15	Sign Inspection	07/30/2009	01/30/2011	
Pembroke Ln	Sign16	Sign Inspection			
Beaverdale Ln	Sign17	Sign Inspection	07/18/2008	01/18/2010	
Birchwood Ln	Sign18	Sign Inspection			
Birchwood Ln	Sign19	Sign Inspection	07/30/2009	01/30/2011	
Birchwood Ln	Sign20	Sign Inspection			
Buckingham Dr	Sign21	Sign Inspection	07/18/2008	01/18/2010	
Buckingham Dr	Sign22	Sign Inspection			
Buckingham Dr	Sign23	Sign Inspection	07/30/2009	01/30/2011	
Birchwood Ln	Sign24	Sign Inspection			
Buckingham Dr	Sign25	Sign Inspection	07/18/2008	01/18/2010	
Buckingham Dr	Sign26	Sign Inspection			
Buckingham Dr	Sign27	Sign Inspection	07/30/2009	01/30/2011	
Buckingham Dr	Sign28	Sign Inspection			
Buckingham Dr	Sign29	Sign Inspection	07/21/2008	01/21/2010	

After entering a date to initialize the process, you are ready to start creating your "To Do" list.

Creating the Work Order

Below are Work Orders created in different ways:

1. From a “To Do” List
2. From a Service Request
3. From an “Asset Search”
4. From an Existing Work Order

Creating a Work Order from the To-Do List

The “To Do List” will aggregate all assets that meet certain criteria – feature type, location, location type, district, task, etc.

After you have selected the criteria, click the “generate list” box in the lower left. This will tell you what needs to be done based on your selections.

In the screenshots below there are 4 signs in the upper screenshot, but only 3 planned replacements in the screenshot directly below. Manor Lane is missing. Why is this?

The reason for the omission is that the yield sign on Manor Lane has not had a task performed for “sign installation,” the computer program counts from the last “sign installation” date. If there isn’t a sign installation date, there will not be a replacement date.

Asset-Task Plans

General Information | **Assets*** | Activity Log | List View

4 Assets

Location	Feature	D/D	Last Done	Next Plan	Scheduled	Active
Babbitt Ln	Test sign		08/21/09	08/21/19		<input checked="" type="checkbox"/>
Brooklawn Dr	Stop Sign 10		01/10/08	01/10/18		<input checked="" type="checkbox"/>
John F Kennedy Wy	Stop Sign 101 John F Kennedy Wa		01/16/08	01/16/18		<input checked="" type="checkbox"/>
Manor Ln	Yield Sign 302 Manor Lane					<input checked="" type="checkbox"/>

To Do List

Search Criteria

Feature Type: District:

Location Type: Location Code / Name:

Task Type: Task Code / Name:

Planned Timeframe:

☐ Exclude Overdue Items

Scheduled Timeframe:

Work Items [3]

	Location Name	Feature Name	Task Name	D/D	Last Done	Planned	Scheduled	In W/D	
<input type="checkbox"/>	Brooklawn Dr	Stop Sign 10	Sign Installation	*	01/10/08	01/10/18	08/21/09	17	
<input checked="" type="checkbox"/>	John F Kennedy Wy	Stop Sign 101 John F Kenn	Sign Installation	*	01/16/08	01/16/18			
<input type="checkbox"/>	Babbitt Ln	Test sign	Sign Installation	*	08/21/09	08/21/19		18	

Note that while the planned timeframe is 2023, the work items are scheduled for 2017, 2018 & 2019. This is because these items are overdue and overdue items are listed unless you check the box for “exclude overdue items”

To fix this problem go to a daily activity and perform the task for “Sign Installation” and say that it was done on mm/dd/yy, so this is entered along with an employee. Now the yield sign on Manor Lane has an original installation date.

Re-running the planned list, it now shows.

Note that while the planned timeframe is 2023, the work items are scheduled for 2017, 2018 & 2019. This is because these items are overdue and overdue items are listed unless you check the box for “exclude overdue items”

	Location Name	Feature Name	Task Name	O/D	Last Done	Planned	Scheduled	In W/D
<input type="checkbox"/>	Brooklawn Dr	Stop Sign 10	Sign Installation	*	01/10/08	01/10/18	08/21/09	17
<input type="checkbox"/>	John F Kennedy Wy	Stop Sign 101 John F Kenn	Sign Installation	*	01/16/08	01/16/18		
<input type="checkbox"/>	Babbitt Ln	Test sign	Sign Installation	*	08/21/09	08/21/19		18
<input type="checkbox"/>	Manor Ln	Yield Sign 302 Manor Lane	Sign Installation	*	11/03/07	11/03/17		

The “To Do List” can also be used as a help with your budgets. Below there are 195 signs that have to be replaced in 2018. If the average cost is \$100 per sign, then \$19,500 should be budgeted for sign replacement.

	Location Name	Feature Name	Task Name	O/D	Last Done	Planned	Scheduled	In W/D
<input checked="" type="checkbox"/>	Bermuda Cir	Stop Sign 32 Maple Street	Sign Installation		01/09/08	01/09/18	08/21/09	17
<input checked="" type="checkbox"/>	Bradford Ln	Stop Sign 2	Sign Installation		01/09/08	01/09/18	08/21/09	17
<input checked="" type="checkbox"/>	Bradford Ln	Stop Sign 3	Sign Installation		07/17/08	07/17/18		
<input checked="" type="checkbox"/>	Shelbourne Ln	Stop Sign 4	Sign Installation		07/17/08	07/17/18		
<input checked="" type="checkbox"/>	Summit Ln	Stop Sign 5	Sign Installation		01/10/08	01/10/18	08/21/09	17
<input checked="" type="checkbox"/>	Sunset Rd	Stop Sign 6	Sign Installation		01/10/08	01/10/18	08/21/09	17
<input checked="" type="checkbox"/>	Bradford Ln	Stop Sign 7	Sign Installation		07/17/08	07/17/18		
<input checked="" type="checkbox"/>	Sheffield Dr	Stop Sign 8	Sign Installation		07/18/08	07/18/18		
<input checked="" type="checkbox"/>	Bartlett Ln	Stop Sign 9	Sign Installation		01/10/08	01/10/18	08/21/09	17
<input checked="" type="checkbox"/>	Brooklawn Dr	Stop Sign 11	Sign Installation		07/18/08	07/18/18		
<input checked="" type="checkbox"/>	Brierdale Ln	Stop Sign 12	Sign Installation		07/18/08	07/18/18		
<input checked="" type="checkbox"/>	Beechfern Ln	Stop Sign 13	Sign Installation		01/10/08	01/10/18	08/21/09	17
<input checked="" type="checkbox"/>	Buttercup Ln	Stop Sign 15	Sign Installation		07/18/08	07/18/18		
<input checked="" type="checkbox"/>	Pembroke Ln	Stop Sign 16	Sign Installation		07/18/08	07/18/18		
<input checked="" type="checkbox"/>	Beaverdale Ln	Stop Sign 17	Sign Installation		01/10/08	01/10/18	08/21/09	17
<input checked="" type="checkbox"/>	Birchwood Ln	Stop Sign 18	Sign Installation		01/10/08	01/10/18	08/21/09	17
<input checked="" type="checkbox"/>	Birchwood Ln	Stop Sign 19	Sign Installation		07/18/08	07/18/18		

101 Locations 195 Features 1 Tasks

Generate List Set All Checks Clear All Checks Create New W/D Add to W/D Print List Close

Creating a Work Order from the “To Do” list

1. From the “To Do List” apply your filters. When you have the items to be worked on, either manually check all items you want to include for this particular work order, or click “Set All Checks” at the bottom of the “To Do List” screen.
2. Click on “Create New WO” to generate a new work order which looks like the work order below.

The screenshot shows the 'Work Orders' window in PubWorks. The 'Work Order' section at the top displays 'WO # 000020' and 'Description Generated from the To Do List on 12/02/2010'. The 'Work View' section shows 'All' items selected. The 'Work Order Details' section contains a table with 195 items, all of which are 'Sign Installation' tasks. The table has columns for Task, Location, Feature, Serv Req#, Done, Result, Task Units, Work Date, and Follow-Up Task. The 'Done' column for all items is empty, indicating they are not yet completed. The 'Task Units' column shows 0.00 for all items. The 'Work Date' column is also empty for all items. The 'Follow-Up Task' column is empty for all items.

Task	Location	Feature	Serv Req#	Done	Result	Task Units	Work Date	Follow-Up Task
Sign Installation	Babcock Ln	Stop Sign 40				0.00		
Sign Installation	Balfour Ln	Stop Sign 453				0.00		
Sign Installation	Barnwell Dr	Stop Sign 35				0.00		
Sign Installation	Barrington Ln	Stop Sign 390				0.00		
Sign Installation	Barrington Ln	Stop Sign 393				0.00		
Sign Installation	Barrington Ln	Stop Sign 394				0.00		
Sign Installation	Bartlett Ln	Stop Sign 9				0.00		
Sign Installation	Bayberry Ln	Stop Sign 37				0.00		
Sign Installation	Bayberry Ln	Stop Sign 38				0.00		
Sign Installation	Bayberry Ln	Stop Sign 39				0.00		
Sign Installation	Bayberry Ln	Stop Sign 41				0.00		
Sign Installation	Bayberry Ln	Stop Sign 42				0.00		
Sign Installation	Beaverdale Ln	Stop Sign 17				0.00		
Sign Installation	Beechfern Ln	Stop Sign 13				0.00		
Sign Installation	Beechnut Ln	Stop Sign 265				0.00		
Sign Installation	Bermuda Cir	Stop Sign 32 Maple Street c				0.00		
Sign Installation	Beverly Flanconas Rd	Stop Sign 350				0.00		
Sign Installation	Beverly Flanconas Rd	Stop Sign 538				0.00		

Hint: Rename the Work Order so that it means something to you. You may have hundreds of Work Orders, so what does “Generated from the To Do List on 12/02/10” mean? Probably nothing, however, changing the Description name to “Signs to Install 2018” tells you why the Work Order was generated.

The screenshot shows the 'Work Orders' window in PubWorks. The 'Work Order' section at the top displays 'WO # 000020' and 'Description Signs to Install 2018'. The 'Work View' section shows 'All' items selected. The 'Work Order Details' section is empty. A text box overlay on the right side of the window says 'Changing the Description to something that is meaningful'.

3. Click the “Edit” button at the top of the Work Order
4. Establish a scheduled date
5. Save

Hint: Include the Department to facilitate looking-up Work Orders by Department.

Modifying Items on the Work Order

This allows you to delete items from your list.

Creating a Work Order from Service Requests

It can be helpful to create a single work order from multiple Service Requests.

1. Add Service Requests to an existing Work Order. You have maintenance scheduled on culverts in the Northeast Section. While there you already have the proper equipment with you to handle Service Requests for drainage problems. Solution: You filter the Service Requests for drainage problems in the Northeast Section and then add these Service Requests to the existing Work Order.
2. Create a new Work Order from one or many Service Requests. You have a number of drainage service requests which may start with an inspection and lead to extended work. You want to keep track of all these Service Requests together over the life of the work.

NOTE: Remember that a plan needs to be created in advance for the work that you want to do. So in the following example, you must already have a pothole plan for all roads created.

Both of the examples above are created in the same way.

Go to your Work Orders and

1. Find an existing Work Order that you want to add Service Requests to
2. Or "Add New" Work Order from Service Requests.

The screenshot shows the 'Work Orders' window in PubWorks. The 'Work Order' tab is active, displaying details for W/O # 000011, Description 'Culvert Repair', and Date Scheduled 'Mon Dec 12 2011'. The 'Work View' is set to 'All'. The 'Work Order Details' section shows a list of 14 tasks, all of which are 'Culvert Repair' at various locations. The tasks are listed in a table with columns for Task, Location, Feature, Serv Req#, Done, Result, Task Units, Work Date, and Follow-Up Task.

Task	Location	Feature	Serv Req#	Done	Result	Task Units	Work Date	Follow-Up Task
Culvert Repair	Babbitt Lane	Culvert 5		✓	OK	7.894.000	12/12/11	
Culvert Repair	Babcock Ln	Culvert 52		✓	OK	0.000	07/13/10	
Culvert Repair	Baldwin Ln	Culvert 6		✓	OK	0.000	07/14/10	
Culvert Repair	Bancroft Ln	Culvert 141		✓	OK	0.000	07/13/10	
Culvert Repair	Barnwell Dr	Culvert 152		✓	OK	0.000	07/14/10	
Culvert Repair	Beaverdale Ln	Culvert 1		✓	OK	5.618.738	12/12/11	
Culvert Repair	Express Ln	Culvert 90		✓	OK	0.000	07/13/10	
Culvert Repair	Exton Ln	Culvert 96		✓	OK	0.000	07/14/10	
Culvert Repair	Flint Rock Ln	Culvert 39		✓	OK	0.000	07/13/10	
Culvert Repair	Garfield Ln	Culvert 84		✓	OK	0.000	07/14/10	
Culvert Repair	Garner Ln	Culvert 100		✓	OK	0.000	07/13/10	
Culvert Repair	Marblestone Ln	Culvert 74		✓	OK	0.000	07/14/10	
Culvert Repair	Marchmont Ln	Culvert 76		✓	OK	0.000	07/13/10	
Culvert Repair	Marshall Ln	Culvert 66		✓	OK	0.000	07/14/10	

When you click “Add Service Request” to either an existing Work Order or a new Work Order, the dialog box for selecting Service Requests will display.

The screenshot shows the 'Work Orders' window with the 'Add Service Request' dialog box open. The dialog box displays a list of 243 open service requests. The 'Request #', 'W/O #', 'Date', 'Description', 'Assignee', 'Department', 'Request Type', 'District', and 'Location' columns are visible. The results are filtered by 'Request Type' and 'District'. The 'New Work Order - All Work Items' section at the bottom shows a table with columns for Task, Location, Feature, and Request #.

Request #	W/O #	Date	Description	Assignee	Department	Request Type	District	Location
000619		12/07/09	There is a problem on Gimble Ln	East, Grover	Public Works	Traffic Light Out	South East	Gimble Ln
000620		12/08/09	There is a problem on Ginger Ln	East, Grover	Public Works	Missed Trash	South East	Ginger Ln
000621		12/14/09	There is a problem on Glen Wy	East, Grover	Public Works	Potholes	South East	Glen Wy
000623		12/21/09	There is a problem on Glenview Ln	East, Grover	Public Works	Line Locate	South East	Glenview Ln
000624		12/22/09	There is a problem on Globe Ln	East, Grover	Public Works	Flooding	South East	Globe Ln
000626		12/29/09	There is a problem on Glover Ln	East, Grover	Public Works	Snow Plowing/San	South East	Glover Ln
000627		01/04/10	There is a problem on Goodwin Ln	East, Grover	Public Works	Street Sign Down	South East	Goodwin Ln
000628		01/11/10	There is a problem on Granby Ln	East, Grover	Public Works	Traffic Light Out	South East	Granby Ln
000630		01/12/10	There is a problem on Granite Ln	East, Grover	Public Works	Street Sign Down	South East	Granite Ln
000631		01/18/10	There is a problem on Gray Ln	East, Grover	Public Works	Potholes	South East	Gray Ln
000632		01/19/10	There is a problem on Grayson Cir	East, Grover	Public Works	Flooding	South East	Grayson Cir

Select the filters you wish to apply. In the following screenshot the results are filtered by Request Type and by District. The results show each time you select a filter. In this case we have ended up with 11 of the 243 open Service Requests.

Work Order - Add Service Request Work Item

Open Service Requests (11 of 243)

Request #	WO #	Date	Description	Assignee	Department	Request Type	District	Location
002551		01/26/10	There is a problem on Meadowbrook Pl	Watts, James		Potholes	North West	Meadowbrook Pl
005035	000049	05/19/09	There is a problem on Torrington Ln	Long, Glen	Public Works	Potholes	North West	36 Babbit Lane
005091	000049	12/01/09	There is a problem on Blackwell Ln	Long, Glen	Public Works	Potholes	North West	11 Blackwell Ln
005095	000049	12/15/09	There is a problem on Bonnie Ln	Long, Glen	Public Works	Potholes	North West	33 Bonnie Ln
005105	000049	01/19/10	There is a problem on Brunswick Ln	Long, Glen	Public Works	Potholes	North West	12 Brunswick Ln
006381		01/12/10	There is a problem on Stafford Ln	Mitchell, Sam		Potholes	North West	Stafford Ln
006385		01/26/10	There is a problem on Stretton Cir	Mitchell, Sam	Public Works	Potholes	North West	Stretton Cir
008291		12/21/09	There is a problem on Willingboro Square	Kramer, Jerry		Potholes	North West	Willingboro Square Con
008301		01/25/10	There is a problem on Bayberry Ln	Kramer, Jerry		Potholes	North West	Bayberry Ln
008371		06/02/11	This is causing me to miss.	Brady, Billy	Engineering	Potholes	North West	55 Babbit Lane
008372		06/07/11	demo	Long, Glen	Public Works	Potholes	North West	Babbit Lane

Clear All Checks ☒ All Open Requests For Assignee... For Department... For Request Type... For District...
☐ In a Work Order ☐ Not in a Work Order [Potholes] [North West]

Information Needed for Work Item
 Task Code / Name
 Add to WO Items Remove from WO Items

New Work Order - All Work Items
 Task Location Feature Request #
☒ All Work Items ☐ Work Items for a Service Request

Save Cancel

Next you either click the “Set All Checks” button to select all the results, or you check each service request that you wish to add to the Work Order.

Work Order - Add Service Request Work Item

Open Service Requests (11 of 243)

Request #	WO #	Date	Description	Assignee	Department	Request Type	District	Location
002551		01/26/10	There is a problem on Meadowbrook Pl	Watts, James		Potholes	North West	Meadowbrook Pl
005035	000049	05/19/09	There is a problem on Torrington Ln	Long, Glen	Public Works	Potholes	North West	36 Babbit Lane
005091	000049	12/01/09	There is a problem on Blackwell Ln	Long, Glen	Public Works	Potholes	North West	11 Blackwell Ln
005095	000049	12/15/09	There is a problem on Bonnie Ln	Long, Glen	Public Works	Potholes	North West	33 Bonnie Ln
005105	000049	01/19/10	There is a problem on Brunswick Ln	Long, Glen	Public Works	Potholes	North West	12 Brunswick Ln
006381		01/12/10	There is a problem on Stafford Ln	Mitchell, Sam		Potholes	North West	Stafford Ln
006385		01/26/10	There is a problem on Stretton Cir	Mitchell, Sam	Public Works	Potholes	North West	Stretton Cir
008291		12/21/09	There is a problem on Willingboro Square	Kramer, Jerry		Potholes	North West	Willingboro Square Con
008301		01/25/10	There is a problem on Bayberry Ln	Kramer, Jerry		Potholes	North West	Bayberry Ln
008371		06/02/11	This is causing me to miss.	Brady, Billy	Engineering	Potholes	North West	55 Babbit Lane
008372		06/07/11	demo	Long, Glen	Public Works	Potholes	North West	Babbit Lane

Clear All Checks ☒ All Open Requests For Assignee... For Department... For Request Type... For District...
☐ In a Work Order ☐ Not in a Work Order [Potholes] [North West]

Information Needed for Work Item
 Task Code / Name
 Add to WO Items Remove from WO Items

New Work Order - All Work Items
 Task Location Feature Request #
☒ All Work Items ☐ Work Items for a Service Request

Save Cancel

A task is then selected that you wish to be performed on these items. Remember: This task must already be linked to the assets.

You must also select if you want to add only those Service Requests that are not already in another Work Order.

Notice that in the dialog box above there are 11 items that match the filtered results. However, in the dialog box below we have only 7 items. This is because the other 4 items are already included in another Work Order. This keeps you from duplicating work requests.

Work Order - Add Service Request Work Item

Open Service Requests [7 of 243]

	Request #	WO #	Date	Description	Assignee	Department	Request Type	District	Location
<input checked="" type="checkbox"/>	002551		01/26/10	There is a problem on Meadowbrook Pl	Watts, James		Potholes	North West	Meadowbrook Pl
<input checked="" type="checkbox"/>	006381		01/12/10	There is a problem on Stafford Ln	Mitchell, Sam		Potholes	North West	Stafford Ln
<input checked="" type="checkbox"/>	006385		01/26/10	There is a problem on Stretton Cir	Mitchell, Sam	Public Works	Potholes	North West	Stretton Cir
<input checked="" type="checkbox"/>	008291		12/21/09	There is a problem on Willingboro Square	Kramer, Jerry		Potholes	North West	Willingboro Square Con
<input checked="" type="checkbox"/>	008301		01/25/10	There is a problem on Bayberry Ln	Kramer, Jerry		Potholes	North West	Bayberry Ln
<input checked="" type="checkbox"/>	008371		06/02/11	This is causing me to miss.	Brady, Billy	Engineering	Potholes	North West	55 Babbit Lane
<input checked="" type="checkbox"/>	008372		06/07/11	demo	Long, Glen	Public Works	Potholes	North West	Babbit Lane

☐ All Open Requests
 ☐ In a Work Order
 ☒ Not in a Work Order

For Assignee...
 For Department...
 For Request Type...
 For District...

Information Needed for Work Item
 Task Code / Name
 858 Patching-Pot Holes

New Work Order - All Work Items
 Task Location Feature Request #

Finally, click "Add to WO Items" and "Save."

Work Order - Add Service Request Work Item

Open Service Requests [0 of 243]

	Request #	WO #	Date	Description	Assignee	Department	Request Type	District	Location
--	-----------	------	------	-------------	----------	------------	--------------	----------	----------

☐ All Open Requests
 ☐ In a Work Order
 ☒ Not in a Work Order

For Assignee...
 For Department...
 For Request Type...
 For District...

Information Needed for Work Item
 Task Code / Name
 858 Patching-Pot Holes

New Work Order - All Work Items [7 of 7]
 Task Location Feature Request #
 Patching-Pot Holes Meadowbrook Pl 002551
 Patching-Pot Holes Stafford Ln 006381
 Patching-Pot Holes Stretton Cir 006385
 Patching-Pot Holes Willingboro Square Condos 008291
 Patching-Pot Holes Bayberry Ln 008301
 Patching-Pot Holes 55 Babbit Lane 008371

☒ All Work Items
 ☐ Work Items for a Service Request

The Work Order is now complete and can be handled like any other Work Order.

Work Orders

Reports First Previous Next Last Add New Save Cancel Delete Locate Edit Copy More Map

Work Order
 WO # **000070** Description **Potholes 12-12-2011** Date Scheduled Date Completed
 Department Project Number / Project Name
 Schedule New Work Date Complete ALL

WO Status
 Created
 Scheduled
 In-Progress
 Completed

Work View
☒ All ☐ To Do ☐ Work Date

Work Date(s)

Actions
 Modify Item List Add Service Request
 Add Single Item

Work Order Details

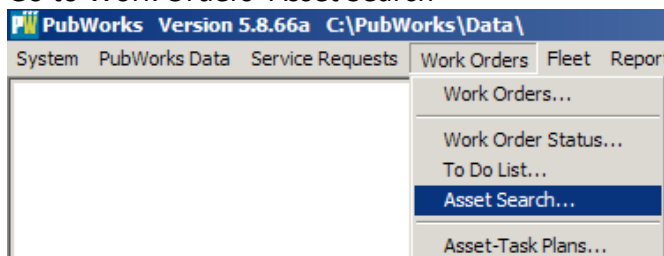
Work Items (7)			Resources			Notes		
Task	Location	Feature	Serv Req#	Done	Result	Task Units	Work Date	Follow-Up Task
Patching-Pot Holes	Meadowbrook Pl		2551	<input type="checkbox"/>		0.000		
Patching-Pot Holes	Stafford Ln		6381	<input type="checkbox"/>		0.000		
Patching-Pot Holes	Stretton Cir		6385	<input type="checkbox"/>		0.000		
Patching-Pot Holes	Willingboro Square Condos		8291	<input type="checkbox"/>		0.000		
Patching-Pot Holes	Bayberry Ln		8301	<input type="checkbox"/>		0.000		
Patching-Pot Holes	55 Babbit Lane		8371	<input type="checkbox"/>		0.000		
Patching-Pot Holes	Babbit Lane		8372	<input type="checkbox"/>		0.000		

New WO

Creating a Work Order from the Asset Search

Using the Asset Search to create Work Orders is a very powerful and useful function.

Go to Work Orders>Asset Search



Select the asset and the criteria for filtering such as districts, MUTCD and any attributes for the asset.

Search Criteria

Location Type (7) District Filter (4) Location Code / Name Filter (2243) Mulcd

☐ Locations ☐ Features

Feature Type (9)

Attribute Operator Numeric Value Text Value List Value

Found Assets

33 Sign Prismatic found - None Selected

	District	Location Type	Location Code	Location Name	Feature Type	Mulcd	Mulcd/val/info	Feature Code	Feature Name	Address	R2	R5	Qty	On	Inst
<input type="checkbox"/>	South East	Street	167	Granery Ln	Sign Prismatic	R1-1		Sign208	Stop Sign 208		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	149	Garnet Ln	Sign Prismatic	R1-1		Sign212	Stop Sign 212		50	100	2	1	03/
<input type="checkbox"/>	South East	Street	140	Gallant Ln	Sign Prismatic	R1-1		Sign216	Stop Sign 216		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	445	Twin Hill Dr	Sign Prismatic	R1-1		Sign236	Stop Sign 236		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	423	Toledo Ln	Sign Prismatic	R1-1		Sign238	Stop Sign 238		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	421	Tipton Ln	Sign Prismatic	R1-1		Sign240	Stop Sign 240		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	423	Toledo Ln	Sign Prismatic	R1-1		Sign242	Stop Sign 242		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	421	Tipton Ln	Sign Prismatic	R1-1		Sign244	Stop Sign 244		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	445	Twin Hill Dr	Sign Prismatic	R1-1		Sign246	Stop Sign 246		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	445	Twin Hill Dr	Sign Prismatic	R1-1		Sign248	Stop Sign 248		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	411	Thornhill Ln	Sign Prismatic	R1-1		Sign250	Stop Sign 250		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	411	Thornhill Ln	Sign Prismatic	R1-1		Sign252	Stop Sign 252		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	430	Trebling Ct	Sign Prismatic	R1-1		Sign254	Stop Sign 254		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	447	Tyler Dr	Sign Prismatic	R1-1		Sign256	Stop Sign 256		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	440	Turner Ln	Sign Prismatic	R1-1		Sign258	Stop Sign 258		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	222	John F Kennedy Wly	Sign Prismatic	R1-1		Sign260	Stop Sign 260		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	222	John F Kennedy Wly	Sign Prismatic	R1-1		Sign262	Stop Sign 262		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	330	Pioneer Ln	Sign Prismatic	R1-1		Sign264	Stop Sign 264		50	100	2	1	Mar
<input type="checkbox"/>	South East	Street	415	Tiffany Ln	Sign Prismatic	R1-1		Sign266	Stop Sign 266		50	100	2	1	Mar

To filter by your selection criteria, Click “Generate List”

You then need to select the assets that you want in the new Work Order. It may be quicker to click the “Set All Checks” button to select everything.

In order to create the Work Order with the filtered items, Click “Create New WO”

Search Criteria

Location Type (7) District Filter (4) Location Code / Name Filter (2243) Mulcd

☐ Locations ☐ Features

Feature Type (9)

Attribute Operator Numeric Value Text Value List Value

Found Assets

33 Sign Prismatic found - 33 Selected

	District	Location Type	Location Code	Location Name	Feature Type	Mulcd	Mulcd/val/info	Feature Code	Feature Name	Address	R2	R5	Qty
<input checked="" type="checkbox"/>	South East	Street	167	Granery Ln	Sign Prismatic	R1-1		Sign208	Stop Sign 208		50	100	2
<input checked="" type="checkbox"/>	South East	Street	149	Garnet Ln	Sign Prismatic	R1-1		Sign212	Stop Sign 212		50	100	2
<input checked="" type="checkbox"/>	South East	Street	140	Gallant Ln	Sign Prismatic	R1-1		Sign216	Stop Sign 216		50	100	2

This will pop-up a dialog box that asks which task you want to perform.

NOTE: As always, the asset and the task must already be planned. You can not select an asset and a task that is not already linked.

Asset Type of Selected Assets
Sign Pri

Task Name	Task Code	Frequency
Sign Inspection	111	18 Months
Sign Installation	112	10 Years

Create Work Order Cancel

This generates a new Work Order. You will want to change the default WO name to something useful.

Work Orders

Work Order
WO # 000081 Description Generated from Asset Search on 10/23/2012 Date Scheduled Date Completed
Department Project Number / Project Name

WO Status
Created
Scheduled
In-Progress
Completed

Actions
Schedule New Work Date
Complete ALL
Modify Item List Add Service Request
Add Single Item

Work View
All To Do Work Date

Work Order Details

Work Items (33)			Resources		Notes				
Task	Location	Feature	Serv Req#	Done	Result	Task Units	Units	Work Date	Follow-Up Task
Sign Inspection	Gallant Ln	Stop Sign 216		<input type="checkbox"/>		0.000	Unit/Item		
Sign Inspection	Garner Ln	Stop Sign 212		<input type="checkbox"/>		0.000	Unit/Item		
Sign Inspection	Gramercy Ln	Stop Sign 208		<input type="checkbox"/>		0.000	Unit/Item		

Creating a New WO from an Existing Work Order – the “Copy” Button

It can be very convenient and time saving to create a new Work Order from an Existing Work Order. For example, you inspect a group of signs every year, and the same signs are always in the same group.

When you finish with a Work Order with these items, Click “Copy”

The screenshot shows the 'Work Orders' window. The 'Work Order' section displays W/O # 000053, Description 'Sign Inspections', Date Scheduled 'Mon May 23 2011', and Date Completed. The 'Work View' section shows 'All' items. The 'Work Order Details' section shows a table of work items:

Task	Location	Feature	Serv Req#	Done	Result	Task Units	Units	Work Date	Follow-Up Task
Sign Inspection	Babbit Lane	Stop Sign at 24 Babbit Lane		<input checked="" type="checkbox"/>	OK	0.000	Unit/Item	05/23/11	
Sign Inspection	Babcock Ln	Stop Sign 40		<input checked="" type="checkbox"/>	OK	0.000	Unit/Item	05/23/11	
Sign Inspection	Baldwin Ln	Stop Sign 459		<input checked="" type="checkbox"/>	OK	0.000	Unit/Item	05/23/11	

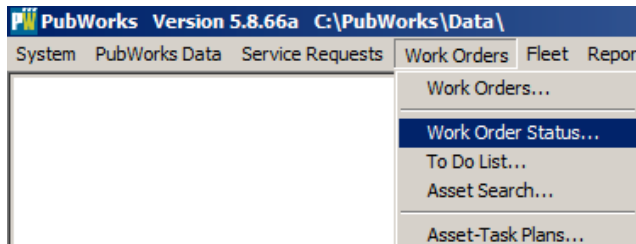
Give the new Work Order a new Description and select a date one year from the completed date.

The 'Copy Work Order 000053' dialog box is shown. The 'New Description' field contains 'Sign Inspections for Next Year'. The 'New Date Scheduled' field shows '05/23/2012'. The 'Work Items to Copy' section has 'All' selected. The 'Resources to Copy' section has 'Employees', 'Equipment', 'Materials', and 'Notes' all checked.

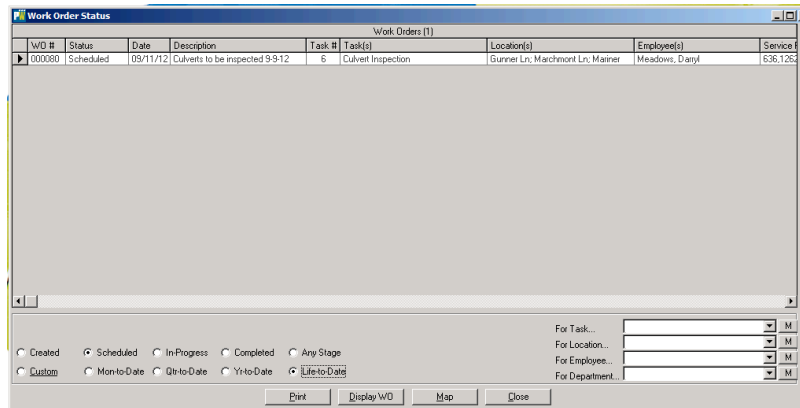
Looking Up Scheduled Work Orders

Looking up scheduled Work Orders, for either now or in the future, is a convenient way to monitor your work.

Go to Work Orders>Work Order Status



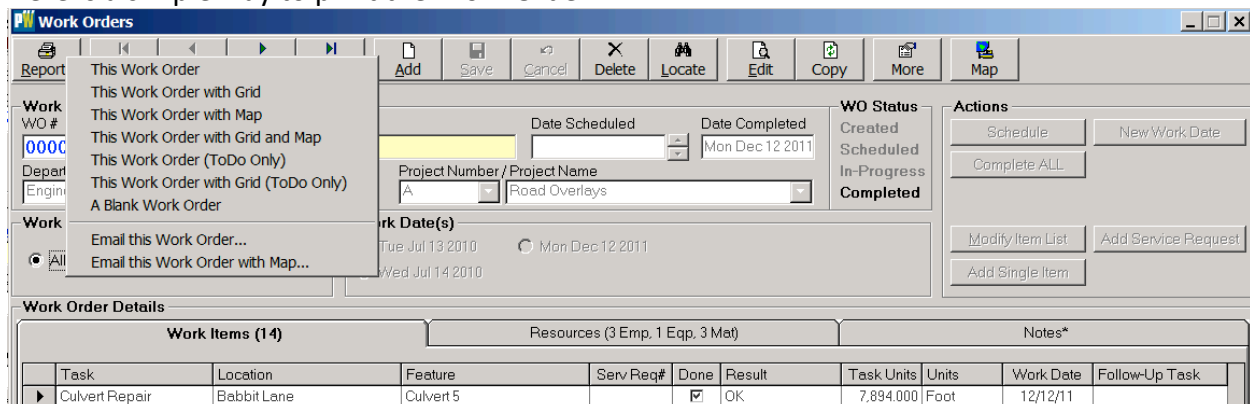
Select the filters you want to apply, and then generate your list.



TIP: Assign Work Orders to a Department. This allows you to quickly view only your department's Work Orders.

Printing a To-Do List for Work Orders

Here is a simple way to print the Work Order.



Work Order # 20

Town of Hanover

Description: Generated from the To Do List on 12/02/2010

Scheduled: Mon, Jan 03, 2011

Employees: None Assigned

Equipment:

Materials:

Item#	SR#	Location	Feature	Task	Done	Remarks
1		Babcock Ln	Stop Sign 40	Sign Installation		
2		Balfour Ln	Stop Sign 453	Sign Installation		
3		Barnwell Dr	Stop Sign 35	Sign Installation		
4		Barrington Ln	Stop Sign 390	Sign Installation		
5		Barrington Ln	Stop Sign 393	Sign Installation		
6		Barrington Ln	Stop Sign 394	Sign Installation		
7		Bartlett Ln	Stop Sign 9	Sign Installation		
8		Bayberry Ln	Stop Sign 37	Sign Installation		
9		Bayberry Ln	Stop Sign 38	Sign Installation		
10		Bayberry Ln	Stop Sign 39	Sign Installation		
11		Bayberry Ln	Stop Sign 41	Sign Installation		
12		Bayberry Ln	Stop Sign 42	Sign Installation		
13		Beaverdale Ln	Stop Sign 17	Sign Installation		
14		Beechfern Ln	Stop Sign 13	Sign Installation		
15		Beechnut Ln	Stop Sign 265	Sign Installation		
16		Bermuda Cir	Stop Sign 32 Maple Street cm	Sign Installation		
17		BeverlyRancocas Rd	Stop Sign 350	Sign Installation		
18		BeverlyRancocas Rd	Stop Sign 538	Sign Installation		
19		BeverlyRancocas Rd	Stop Sign 541	Sign Installation		
20		Birchwood Ln	Stop Sign 18	Sign Installation		

Employees:

Name	Reg hrs	OT hrs	Callout hrs
Text Object			

Equipment:

Unit	Name	Hours	Miles

Materials:

Quantity	Part Number	Description	Unit Cost	Total Cost

Completing the Work Order

Upon completion of the work you must enter at a minimum the following: which assets had work performed and who did the work and how much time did it take. The WO already has the task that was done.

Were all items done – if not, which ones were completed?

Who was assigned the work?

Does vehicle and material usage need to be recorded?

Do incomplete items need to be scheduled?

Note: Work performed on a Work Order is the same as entering a daily activity for the asset. You do not re-enter work performed on a Work Order under Daily Activities. This will cause you to double count the work done by an employee.

Entering Work that was Performed

After completing the work, do the following:

Edit

New Work Date – Enter the date that the work is being performed

Complete ALL – if all the work was done, then click this box

All items will be given the default result, which in this case is OK

Note: Each asset will now reflect that the task was performed on a date, by which employee, etc. If there are 100 items on the “To Do List”, then 100 items will reflect the work performed! This is a real benefit of the Work Order Module.

The screenshot shows the 'Work Orders' window in PubWorks. The 'Work Order' section displays 'WO # 000020' and 'Description Signs to Install 2018'. The 'Date Scheduled' is 'Mon Apr 25 2011'. The 'WD Status' is 'Completed'. The 'Work View' shows 'All' items. The 'Work Date(s)' is 'Mon Apr 25 2011'. The 'Actions' section includes 'Modify Item List', 'Add Service Request', and 'Add Single Item'. The 'Work Order Details' table shows 195 items, all with a 'Result' of 'OK' and a 'Work Date' of '04/25/11'.

Task	Location	Feature	Serv Req'd	Done	Result	Task Units	Work Date	Follow-Up Task
Sign Installation	Babcock Ln	Stop Sign 40		✓	OK	0.00	04/25/11	
Sign Installation	Balfour Ln	Stop Sign 453		✓	OK	0.00	04/25/11	
Sign Installation	Barnwell Dr	Stop Sign 35		✓	OK	0.00	04/25/11	
Sign Installation	Barrington Ln	Stop Sign 380		✓	OK	0.00	04/25/11	
Sign Installation	Barrington Ln	Stop Sign 383		✓	OK	0.00	04/25/11	
Sign Installation	Barrington Ln	Stop Sign 394		✓	OK	0.00	04/25/11	
Sign Installation	Bartlett Ln	Stop Sign 9		✓	OK	0.00	04/25/11	
Sign Installation	Bayberry Ln	Stop Sign 37		✓	OK	0.00	04/25/11	
Sign Installation	Bayberry Ln	Stop Sign 38		✓	OK	0.00	04/25/11	
Sign Installation	Bayberry Ln	Stop Sign 39		✓	OK	0.00	04/25/11	
Sign Installation	Bayberry Ln	Stop Sign 41		✓	OK	0.00	04/25/11	
Sign Installation	Bayberry Ln	Stop Sign 42		✓	OK	0.00	04/25/11	
Sign Installation	Beaverdale Ln	Stop Sign 17		✓	OK	0.00	04/25/11	
Sign Installation	Beechfern Ln	Stop Sign 13		✓	OK	0.00	04/25/11	
Sign Installation	Beechnut Ln	Stop Sign 285		✓	OK	0.00	04/25/11	
Sign Installation	Bermuda Cir	Stop Sign 32 Maple Street c		✓	OK	0.00	04/25/11	
Sign Installation	Beverly Rancocas Rd	Stop Sign 350		✓	OK	0.00	04/25/11	
Sign Installation	Beverly Rancocas Rd	Stop Sign 538		✓	OK	0.00	04/25/11	

Entering Resources for a Completed Work Order

Entering labor, equipment and materials in Work Orders is very easy and takes the place of entering the work as a daily activity.

Under the “Resources” tab, enter labor, equipment and materials. You have now entered the equivalent of a daily activity for each of the employees.

Work Order
 WO # 000020 Description Signs to Install 2018 Date Scheduled Mon Apr 25 2011 Date Completed
 Department Project Number / Project Name
 Work View: All, To Do, Work Date
 Work Date(s): Mon Apr 25 2011
 Actions: Add Employee, Add Equipment, Add Material, Add Crew
 WO Status: Un-Schedule, Scheduled, In-Progress, Completed
 Notes: Employee Cost (\$): 395.92, Equipment Cost (\$): 264.00, Material Cost (\$): 97.72, Work Order Total (\$): 757.64

Employees (2)		Equipment		Materials (2)	
Employee Code	Employee Name	Lead	Hours	Rate (\$)	Cost (\$)
14	East, Grover	<input checked="" type="checkbox"/>	8.00	33.17	265.36
P12	Mitchell, Sam	<input type="checkbox"/>	8.00	16.32	130.56

Equip Code	Equipment Name	Hr/Mi	Rate	Cost (\$)
1015	F250 Pickup	8.00	33.00	264.00

Mat Code	Material Name	Qty	Rate	Cost (\$)
sp12	12 foot sign post	4.00	15.65	62.60
SAKCS	Sackrete	8.00	4.39	35.12

Record: 12 of 13 | 000020 | Signs to Install 2018 | \$757.64 | Created

The total costs are allocated evenly to each of the assets. The work is recorded under the asset's record. So for this WO, each asset is assigned 1/195th of the total labor, material and equipment costs.

Managing Partially Completed Work Orders

Done – Not Done Items

There are various reasons why a Work Order isn't completed in a single day:

- There are just too many items on the list

- A single item is repaired immediately and this takes a long time

- Major repairs are needed and this will be done later

PubWorks gives you the flexibility to enter partially completed work orders.

The simplest form of an incomplete work order is to just say OK to those items completed and leave the other items open.

Notice in the record below there are:

- 14 total work items

- 2 work items are not done

- 12 work items were done on either July 13th or July 14th, 2010.

Work Orders

Reports First Previous Next Last Add New Save Cancel Delete Locate Edit Copy More Map

Work Order
 WO # **000011** Description **Culvert Repair** Date Scheduled Date Completed
 Department **Engineering** Project Number / Project Name **A** Road Overlays
 Schedule New Work Date Complete ALL

WO Status
 Created
 Scheduled
In-Progress
 Completed

Work View
☒ All ☐ To Do ☐ Work Date

Work Date(s)
☒ Tue Jul 13 2010
☐ Wed Jul 14 2010

Actions
 Modify Item List Add Service Request
 Add Single Item

Work Order Details

Work Items (14)			Resources (3 Emp, 1 Eqp, 3 Mat)			Notes*		
Task	Location	Feature	Serv Req#	Done	Result	Task Units	Work Date	Follow-Up Task
Culvert Repair	Babbitt Lane	Culvert 5		<input type="checkbox"/>		0.000		
Culvert Repair	Babcock Ln	Culvert 52		<input checked="" type="checkbox"/>	OK	0.000	07/13/10	
Culvert Repair	Baldwin Ln	Culvert 6		<input checked="" type="checkbox"/>	OK	0.000	07/14/10	
Culvert Repair	Bancroft Ln	Culvert 141		<input checked="" type="checkbox"/>	OK	0.000	07/13/10	
Culvert Repair	Barnwell Dr	Culvert 152		<input checked="" type="checkbox"/>	OK	0.000	07/14/10	
Culvert Repair	Beaverdale Ln	Culvert 1		<input type="checkbox"/>		0.000		
Culvert Repair	Express Ln	Culvert 90		<input checked="" type="checkbox"/>	OK	0.000	07/13/10	
Culvert Repair	Exton Ln	Culvert 96		<input checked="" type="checkbox"/>	OK	0.000	07/14/10	
Culvert Repair	Flint Rock Ln	Culvert 39		<input checked="" type="checkbox"/>	OK	0.000	07/13/10	
Culvert Repair	Garfield Ln	Culvert 84		<input checked="" type="checkbox"/>	OK	0.000	07/14/10	
Culvert Repair	Garnier Ln	Culvert 100		<input checked="" type="checkbox"/>	OK	0.000	07/13/10	
Culvert Repair	Marblestone Ln	Culvert 74		<input checked="" type="checkbox"/>	OK	0.000	07/14/10	
Culvert Repair	Marchmont Ln	Culvert 76		<input checked="" type="checkbox"/>	OK	0.000	07/13/10	
Culvert Repair	Marshal Ln	Culvert 66		<input checked="" type="checkbox"/>	OK	0.000	07/14/10	

Record: 1 of 18 | 000011 | Culvert Repair | \$10,901.04 | In-Progress

Clicking the “To Do” radio button gives me what is still open and you can perform this work.

PubWorks Version 5.8.41 / dB Version 58a C:\Program Files (x86)\PubWorks\Data\

System PubWorks Data Service Requests Work Orders Fleet Reports Windows Help

Work Orders

Reports First Previous Next Last Add New Save Cancel Delete Locate Edit Copy More Map

Work Order
 WO # **000011** Description **Culvert Repair** Date Scheduled Date Completed
 Department **Engineering** Project Number / Project Name **A** Road Overlays
 Schedule New Work Date Complete ALL

WO Status
 Created
 Scheduled
In-Progress
 Completed

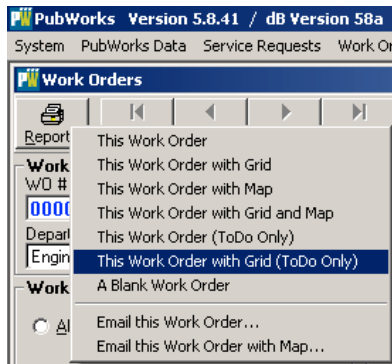
Work View
☐ All ☒ To Do ☐ Work Date

Work Date(s)
☒ Tue Jul 13 2010
☐ Wed Jul 14 2010

Actions
 Modify Item List Add Service Request
 Add Single Item

Work Order Details

Work Items (2+)			Resources (3 Emp, 1 Eqp, 3 Mat)			Notes*		
Task	Location	Feature	Serv Req#	Done	Result	Task Units	Work Date	Follow-Up Task
Culvert Repair	Babbitt Lane	Culvert 5		<input type="checkbox"/>		0.000		
Culvert Repair	Beaverdale Ln	Culvert 1		<input type="checkbox"/>		0.000		



Work Order # 11		Willingboro Public Works				
Description: Culvert Repair		Scheduled:				
Employees: Anderson, Pete (Lead) Brady, Billy Pierce, Tom		Equipment: Ford F350 Pickup		Materials: Culvert 18 Inch Culvert Bolts Culvert Nuts		
Item#	SR#	Location	Feature	Task (To Do)	Done	Remarks
1		Babbit Lane	Culvert 5	Culvert Repair		
2		Beaverdale Ln	Culvert 1	Culvert Repair		
Notes: do this do that then do this thing last.						
Employees:				Equipment:		
Name	Reg hrs	OT hrs	Callout hrs	Unit	Name	Hours
Materials:						
Quantity	Part Number	Description		Unit Cost	Total Cost	

NOTE: This Work Order is already in process, so you do not add a new "Date Scheduled" rather you add a "New Work Date" to the on-going list of work dates. This will add a new work date and you can then enter completed work and resources used for the new work date. Notice below that the work date of Monday, December 12, 2011 has been added.

PubWorks Version 5.8.41 / dB Version 58a C:\Program Files (x86)\PubWorks\Data\

System PubWorks Data Service Requests Work Orders Fleet Reports Windows Help

Work Orders

Reports First Previous Next Last Add New Save Cancel Delete Locate Edit Copy More Map

Work Order

WD # Description Date Scheduled Date Completed

000011 Culvert Repair

Department Project Number / Project Name

Engineering A Road Overlays

Work View

All To Do Work Date

Work Date(s)

Tue Jul 13 2010 Mon Dec 12 2011 Wed Jul 14 2010

Actions

Modify Item List Add Service Request Add Single Item

WD Status

Created Scheduled In-Progress Completed

Work Order Details

Work Items (2+)			Resources (3 Emp, 1 Eq, 3 Mat)			Notes*		
Task	Location	Feature	Serv Req#	Done	Result	Task Units	Work Date	Follow-Up Task
Culvert Repair	Babbit Lane	Culvert 5		<input type="checkbox"/>		0.000		
Culvert Repair	Beaverdale Ln	Culvert 1		<input type="checkbox"/>		0.000		

You enter the resources used and any notes for the current work date. If this completes all the assigned items, the "Date Completed" will automatically be entered, closing this Work Order.

PubWorks Version 5.8.41 / dB Version 58a C:\Program Files (x86)\PubWorks\Data\

System PubWorks Data Service Requests Work Orders Fleet Reports Windows Help

Work Orders

Reports First Previous Next Last Add New Save Cancel Delete Locate Edit Copy More Map

Work Order

WD # Description Date Scheduled Date Completed

000011 Culvert Repair

Department Project Number / Project Name

Engineering A Road Overlays

Work View

All To Do Work Date

Work Date(s)

Tue Jul 13 2010 Mon Dec 12 2011 Wed Jul 14 2010

Actions

Add Employee Add Equipment Add Material Add Crew

WD Status

Created Scheduled In-Progress Completed

Work Order Details

Work Items (6+)			Resources (3 Emp, 1 Eq, 3 Mat)			Notes*		
Employees (3)						Employee Cost (\$) 458.24		
Employee Code	Employee Name	Lead	Hours	Rate (\$)	OT Hrs	Rate (\$)	Cost (\$)	Equipment Cost (\$) 128.00
6505	Anderson, Pete	<input checked="" type="checkbox"/>	8.00	18.75	0.00	28.13	150.00	Material Cost (\$) 4,098.00
15	Brady, Billy	<input type="checkbox"/>	8.00	25.00	0.00	37.50	200.00	Work Order Total (\$) 4,684.24
19	Pierce, Tom	<input type="checkbox"/>	8.00	13.53	0.00	20.30	108.24	
Equipment (1)						Materials (3)		
Equip Code	Equipment Name	Hr/Mi	Rate	Cost (\$)	Mat Code	Material Name	Qty	Rate
2345	Ford F350 Pickup	8.00	16.00	128.00	C18	Culvert 18 Inch	18.00	221.00
					CNuts	Culvert Nuts	24.00	3.00
					CB	Culvert Bolts	24.00	2.00

Record: 1 of 18 | 000011 | Culvert Repair | \$4,684.24 | Completed | 12/12/2011

Work Orders with Different Outcomes

When performing an inspection, cleaning or other task, you may find that additional work is needed such as:

- Additional Repairs
- Replacement

You want to record what needs to be done. So instead of checking that an item is OK, you will check the appropriate outcome. In the following example you need additional Major Repairs which will be performed at a later date.

The culverts were cleaned and “OK” with the exception of the first 4 culverts. These culverts need Major Repair work done. So when you check “Done” you then choose Major Repair as the “Result.”

The screenshot shows the 'Work Orders' window in PubWorks. The 'Work Order' section at the top shows W.O. # 000069, Description 'Culvert Cleaning 2012', and Date Scheduled 'Mon Dec 12 2011'. The 'Work View' section shows 'All' items. The 'Work Order Details' section contains a table of work items.

Task	Location	Feature	Serv Req#	Done	Result	Task Units	Work Date	Follow-Up Task
Culvert Inspection	Babbit Lane	Culvert 5		<input checked="" type="checkbox"/>	MajorRepair	0.000	12/12/11	Culvert Repair
Culvert Inspection	Babcock Ln	Culvert 146		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Babcock Ln	Culvert 52		<input checked="" type="checkbox"/>	OK			
Culvert Inspection	Baldwin Ln	Culvert 6		<input checked="" type="checkbox"/>	OK			
Culvert Inspection	Ballad Ln	Culvert 147		<input checked="" type="checkbox"/>	Blockage			
Culvert Inspection	Ballad Ln	Culvert 51		<input checked="" type="checkbox"/>	MajorRepair			Culvert Repair
Culvert Inspection	Bancroft Ln	Culvert 141		<input checked="" type="checkbox"/>	MinorRepair			Culvert Repair
Culvert Inspection	Barker Ln	Culvert 142		<input checked="" type="checkbox"/>	PARTIAL			
Culvert Inspection	Barnwell Dr	Culvert 152		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Barnwell Dr	Culvert 53		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Bayberry Ln	Culvert 149		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Bayberry Ln	Culvert 50		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Beaverdale Ln	Culvert 1		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Beechfern Ln	Culvert 33		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Belmont Ln	Culvert 144		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Bentley Ln	Culvert 19		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Bentley Ln	Culvert 22		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Berkshire Ln	Culvert 145		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	

Record: 19 of 19 | 000069 | Culvert Cleaning 2012 | \$0.00 | Scheduled | 12/12/2011

In the original setup, a result of Major Repair, creates a follow-up task of Culvert Repair.

Selecting a follow-up of “Immediate” or “After” does the following:

Immediate follow-up will say that the work for that asset has been completed and is now off of the to-do list.

After means that some work is not done. So the asset will remain on the Work Order's to-do list along with the “Follow-Up Task” selected.

Task Completion Results					
Result	Default	Follow-Up Task *	Follow-Up Done		
			Immediate	After	Active
OK	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Blockage	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MajorRepair	<input type="checkbox"/>	Culvert Repair	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MinorRepair	<input type="checkbox"/>	Culvert Repair	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
PARTIAL	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

After entering the results of Major Repair for these 4 culverts, you now have the following:

Work Orders

Reports First Previous Next Last Add New Save Cancel Delete Locate Edit Copy More Map

Work Order
 W.O. # 000069 Description Culvert Cleaning 2012 Date Scheduled Mon Dec 12 2011 Date Completed
 Department Project Number / Project Name

WD Status
 Created
 Scheduled
In-Progress
 Completed

Work View
☒ All ☐ To Do ☐ Work Date

Work Date(s)
 Mon Dec 12 2011

Actions
 Modify Item List Add Service Request
 Add Single Item

Work Order Details

Work Items (44)			Resources (1 Emp, 1 Eqp)		Notes			
Task	Location	Feature	Serv Req#	Done	Result	Task Units	Work Date	Follow-Up Task
Culvert Inspection	Babbitt Lane	Culvert 5		<input checked="" type="checkbox"/>	MajorRepair	0.000	12/12/11	Culvert Repair
Culvert Inspection	Babcock Ln	Culvert 146		<input checked="" type="checkbox"/>	MajorRepair	0.000	12/12/11	Culvert Repair
Culvert Inspection	Babcock Ln	Culvert 52		<input checked="" type="checkbox"/>	MajorRepair	0.000	12/12/11	Culvert Repair
Culvert Inspection	Baldwin Ln	Culvert 6		<input checked="" type="checkbox"/>	MajorRepair	0.000	12/12/11	Culvert Repair
Culvert Inspection	Ballad Ln	Culvert 147		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Ballad Ln	Culvert 51		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Bancroft Ln	Culvert 141		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	
Culvert Inspection	Barker Ln	Culvert 142		<input checked="" type="checkbox"/>	OK	0.000	12/12/11	

If you go to the "To Do" view, you will now see that you have a new tasks added to the existing work order for these 4 items. Notice that the original task was "Culvert Inspection" but now the task is "Culvert Repair."

Work Orders

Reports First Previous Next Last Add New Save Cancel Delete Locate Edit Copy More Map

Work Order
 W.O. # 000069 Description Culvert Cleaning 2012 Date Scheduled Mon Dec 12 2011 Date Completed
 Department Project Number / Project Name

WD Status
 Created
 Scheduled
In-Progress
 Completed

Work View
☐ All ☒ To Do ☐ Work Date

Work Date(s)
 Mon Dec 12 2011

Actions
 Modify Item List Add Service Request
 Add Single Item

Work Order Details

Work Items (4*)			Resources (1 Emp, 1 Eqp)		Notes			
Task	Location	Feature	Serv Req#	Done	Result	Task Units	Work Date	Follow-Up Task
Culvert Repair	Babbitt Lane	Culvert 5		<input type="checkbox"/>		0.000		
Culvert Repair	Babcock Ln	Culvert 146		<input type="checkbox"/>		0.000		
Culvert Repair	Babcock Ln	Culvert 52		<input type="checkbox"/>		0.000		
Culvert Repair	Baldwin Ln	Culvert 6		<input type="checkbox"/>		0.000		

You can now create a printed work order for these 4 items and then enter the work with a new "Work Date" and task completion.