

# **WORK ORDERS**

REFERENCE MANUAL

AND

INSTALLATION GUIDE

(last revised Oct. 2019)

## Introduction

This manual provides descriptive and operational information for the Work Orders program which operates on PCs running Microsoft Windows.

Section 1, **Main Menu**

Section 2, **Keyboard Use**

Section 3, **Printer Settings**

Section 4, **Work Order Entry**; a description of how to enter and print Work Order info.

Section 5, **Task Codes**; a description of how to set up codes that will represent Work Order tasks.

Section 6, **Employee Codes**; a description of how to set up codes that will represent Employees.

Section 7, **Other Functions**; a description of miscellaneous routines.

Section 8, **Options**: a description of how to enter recurring data that is needed each day in Work Order functions.

## Work Order Overview

- o The Work Order software is menu driven to minimize operator training time. At each step the operator is prompted as to what entry is needed. This feature reduces operator training time.
- o Task and Employee Codes may be set up to help automate insertion of key data on the Work Order.
- o User is allowed to enter a Work Order entering the date, time, location, and tasks to be done.  
Optionally a Work Order form may be printed to give to the personnel who will be completing the tasks.
- o When the Work Order is completed user may enter in the completion info (date completed, time, by which employee, etc).
- o When needed user may print lists of Work Orders by date, by type of task, employee, etc.

## SECTION 1 MAIN MENU

Upon entering the Work Order program the following screen will display.

```
Work Order Manager (x.x)
-----
|Work Orders  Task Codes  Employee Codes  Other Routines  Options  Exit |
|-----|
| Work Orders |
| Task Codes |
| Employee Codes |
| Exit |
|
| Work Orders |
|
|-----|
=====
```

Each of the items on the main menu is a separate program and each program is opened by clicking on the command or by using a short-cut key (displayed by pressing the Alt key). The purpose of the main menu is to inform the operator what options are available and to provide the user with the opportunity to select the routine which performs the desired function. Note also on the main menu is a version number. Since these programs are updated regularly, this number will help you and your installer know which version you have. Note: if desired you may display a photo on the main menu. To do this copy the photo file into the Work Order directory (usually named WOrders) and name it WorkOrdr.jpg.

Selecting the Esc key, "X", or the 'Exit' command will close the main menu and will cause the system to return to the Windows Desktop.

In the following sections an attempt will be made to explain the operation of each program and how it interacts with all of the other programs. To learn the operation of the Work Orders program, read the sections of this document in the following sequence:

- Section 2 - Keyboard Use
- Section 3 - Printer Settings
- Section 1 - Main Menu
- Section 8 - Options
- Section 7 - Other Routines
- Section 5 - Task Codes
- Section 6 - Employee Codes
- Section 4 - Work Orders

## SECTION 2 KEYBOARD USE

This software is written for use on personal computers using Microsoft Windows. The keyboard of that system has some special function keys. Below is a list and an explanation of their use:

<b>Key</b>	<b>Function</b>
Tab	This key is normally used to move from field to field although in some cases Enter will do the same thing.
Shift-Tab	This key combination is normally used to move back to the previous field
Enter	When the cursor is on a command (such as "Save" or "Close") this key is normally used to execute the command (same as clicking on the command). On Lookup screens and other screens that display lists of records, Enter can be used to select the highlighted record. On Work Order entry screens this key causes the cursor to move to the next field (like the Tab key).
Esc	This key will cause a program to close and return to the Main Menu. In File Maintenance programs if a record is displayed on the screen the Esc key will first clear the screen and if pressed again will cause the program to close. On screens where data is filled out Esc acts like a Cancel command by clearing the screen. For example when adding a new work order pressing Esc would cause the program to cancel the operation and the work order screen would be cleared.
Down/Up Arrow	In the some programs these keys will scroll thru records. For example in the Work Order program user can enter a partial name and the closest record will display. User may then press Down/Up arrows to scroll thru additional records until the record desired is displayed. On 'Lookup' screens and other screens with lists of records user may use these keys to move up and down the list of records to get to the record desired.
Page Up/Down	On Lookup screens and other screens that display lists of records user may use these keys to display the next or previous page of records making it faster to get to the record desired.
Alt	This key will make the short-cut keys visible. For example on many screens there is a "Print" command. To access this command by using the keyboard press the Alt key and the letter "P" to execute the Print command.
Home	When entering info in a data field, this key moves the cursor back to the beginning of the field.
End	When entering info in a data field, this key moves the cursor to the end of any existing text.

### SECTION 3 PRINTER SETTINGS

All “Print” programs allow user to select a default printer name, font, size, and orientation which are unique to the program opened. Following is an explanation of each of the fields:

- Printer:** The default or last used printer name will initially display but user can select the drop-down arrow to choose any other printers set up under Windows Printers/Faxes.
- Font:** The default or last used font will initially display but user can select the drop-down arrow to choose any other displayed font.
- Size:** The default or last used font size will initially display but user can select the drop-down arrow to choose any other font size desired.
- Orientation:** The default or last used orientation selected. The orientation can be either Portrait (8 1/2 X 11) or Landscape (11 X 8 1/2). User may select from a drop-down list or by pressing P or L.
- Set:** When user prints a report the printer settings (name, font, size, or orientation) are saved. Use this command if user has changed the printer settings and wants to save the new settings without printing.
- Print to Screen:** If a report screen has this checkbox and it is enabled then checking it means the report should be displayed to the screen instead of printed to paper.

Note that all the above settings are stored in each PC’s registry so the settings can be uniquely set for each PC.

Programs will initially list your Windows default printer as the printer name and “Arial” will initially be the default font name. The default size will vary and in some cases may not be the ideal size for your printer. Below are recommended print sizes.

<b>Program Name</b>	<b>Font Size (Arial)</b>
Work Order Reports	8
Work Order Form	10 or 11
Task Code Rept	10 or 11
Employee Code Rept	10 or 11

If the font size selected results in a print size smaller than you desire, an alternative would be to use the font “Arial Narrow” (if available) which allows user to increase the font size by 1 or 2. For example a report printed at Arial-8 could be printed at Arial Narrow-9 or 10 which would be more readable.

## SECTION 4 WORK ORDERS

This program is used to enter and print Work Orders. The purpose of this program is to enter, store, and print Work Orders. During Work Order entry the program allows for selecting standard Utility Tasks or "Other Tasks" which have task codes set up for easy entry. "Completion" info is entered when the tasks are completed including the name of employee completing the task using employee codes or by manually typing the name.

After choosing the "Work Orders" command the following screen appears:

```

=====
|Post  Edit  Delete  Print  Lookup  Main Menu  Help
|-----
|Work Order#: _____ Date: _____ Time: ____ AM  By: _____ Entry: Date: _____ Time: _____
|Dept:  _Water/Sewer  _Electric  _Gas  _Street
|       _Sanitation  _Cemetery  _Park/Rec  _Other  Desc: _____
|Utility Loc: _____ Name: _____ Location: _____
|Account #: _____ Phone#: _____
|
|           Meter Ser# EID/ERT# MM/YY Dig #D Prev Rdg Curr Rdg Service Desc:
|           Meter-1: _____
|           Meter-2: _____
|           Meter-3: _____
|
|Utility Task: _Re-Read  _Turn-on  _Turn-off  _Install/Repair  _Transfer
|
|Other Task 1: _____ Catgy: _____
|Other Task 2: _____ Catgy: _____
|
|Comments: _____
|-----
|_Completed  Date: _____ Time: ____ AM  By: _____
|
|Meter Readings: Meter-1: _____ Meter-2: _____ Meter-3: _____ Updt Cust Acct
|Gas Meter Actions: _Blended  _Locked  _Removed  _Spot Tested 5 Minutes oPassed oFailed
|
|Remarks: |
|          |
|          |
|-----
|
|           Save           Cancel
|-----
  
```

Name: \_\_\_\_\_ Location: \_\_\_\_\_ WO#: \_\_\_\_\_ Exit

User may exit the Work Orders program by pressing Esc or selecting "X" or "Exit" or "Main Menu" command. Otherwise user will normally follow these general steps:

- a. Post new Work Orders and print a Work Order form.
- b. Edit an existing Work Order entering "completion" info.
- c. Print Lists of Work Orders when needed.

### Work Order Entry

To review, edit, or delete a previously entered Work Order, user must enter a name, location, or work order# from the "Name", "Location" or "Work Order#" fields at the bottom of the screen. If the exact value is not known user may enter an approximate value then select "Lookup" (Alt-L) or press Down-Up Arrow (or click on red arrows at top of screen) to scroll to the correct record. When in the Location field user may do a **keyword** Lookup by entering "/" followed by a keyword. For example /MAIN would display all locations on Main St.

## Post

To post a new Work Order user should select "Post" command (Alt-O). The Work Order screen should then be filled in by user. Following is an explanation of each field:

- WO#:** Depending upon how the Auto-WO# question on the Options-General screen has been answered, the Work Order# will either fill in automatically with the next automatic number or will begin with 000001. If "Edit WO#" in Options has been un-checked then this field may not be changed. If that question is checked user may change the Work Order#.
- Date:** Work Order date. Leaving the date blank will cause the program to display the current date.
- Time:** User may enter a time the Work Order was called in. Leaving the time blank will cause the program to display the current time.
- AM/PM:** If the system time fills in automatically the AM/PM will fill in correctly. On a manual entry the program will attempt to display the correct value based on the time where hours 7 thru 11 will display AM while all other hours will display PM (ex: 9:00 will be AM while 4:00 will display PM). If the value does not display correctly then change it using Up-Down arrows or from the drop-down list or by pressing A or P keys.
- By:** First name or initials of person entering work order.
- Entry Date:** Current date filled in automatically and not changeable. This helps user know the date the Work Order was actually entered.
- Entry Time:** Current time filled in automatically and not changeable. This helps user know the time the Work Order was actually entered.
- Dept:** Checkboxes are provided so user can indicate which dept the Work Order is to be turned over to for completion. More than one dept may be checked. If the dept is not listed then check "Other" and type the dept name. Boxes may be checked by clicking or pressing the space bar.
- Utility Loc:** Since this program allows access to two sets of Utility files, user may select the location name from this drop-down list. Initially the setting will be first location name but user may change by pressing down-arrow or by using the mouse to access the drop-down list. Upon beginning each Work Order this value will automatically repeat from the last entry. Note: this field is not accessible by using Tab or Enter from other fields so the mouse must be used to gain access.
- Account#:** If the Work Order is utility-related then user can enter the utility acct# so utility info can be displayed on the screen. If acct# is not known user can enter an approximate acct# and select Lookup (Alt-L) to get a list of customers in acct# order. Optionally user can leave the acct# blank and press Enter or Tab to go to the "Name" or "Location" fields to perform a lookup. Once a valid acct# is found the customer's name, address, and meter readings will display.
- Name:** If entering a utility-related Work Order and the account# is not known then user may enter a few letters of the name and select 'Lookup' (Alt-L) to get a list of utility customers in name order. When the record desired is selected the customer name, address, and account# will fill in automatically on the Work Order screen. If the Work Order is not utility-related then user must type the name.
- Location:** If entering a utility-related Work Order and the account# is not known then user may enter a few letters of the location and select 'Lookup' (Alt-L) to get a list of utility customers in service address order. If the Lookup should be for a keyword (ex: Main St) then enter "/" followed by the keyword(s). When the record desired is selected the customer name, address, and account# will fill in automatically on the Work Order screen. If the Work Order is not utility-related then user must type the location.
- Phone#:** If entering a utility acct#, the home phone# will auto-fill from the customer utility acct. If there is no home phone# then the cell# will be used. If no cell# then the work phone# will display.

**Meter Info:** If the Work Order is utility-related and a customer acct has been accessed from the utility files this info (serial#, EID#, etc) will fill in automatically but can be changed.

**Utility Tasks:** If this is a utility-related Work Order user should check the task involved. More than one box can be checked if needed. Tasks may be checked/unchecked by clicking on the box or pressing space bar.

**Other Tasks:** Up to two **Other** tasks may be filled in. These tasks may be accessed by entering a code already set up in the Task Code file. If the code is not known then user may press Down/Up arrows or use the mouse to open the drop-down list to view records by description. User may select the record by double-clicking or pressing Enter when a record is high-lighted. Note: if you chose specific depts on the Task Code records the program will only display records for the selected depts.

**Catgy:** When the Task Code was set up a Catgy could be entered which is displayed when each 'Other' Task is selected. This value can be changed if needed.

**Comments:** If any additional information about the Work Order is needed to be recorded, enter it on the two Comment lines.

**COMPLETION INFO:**

**Completed:** Check this box when the Work Order is completed. When checked the below fields will get enabled.

**Date:** The date completed. Leaving the date blank will repeat the Work Order date automatically. If the date is not known enter 0. Otherwise enter the date.

**Time:** Time completed if known. If not known enter 0 or leave blank.

**AM/PM:** Specifies whether time completed was in the AM or PM. When the time is entered the program will attempt to display the correct value based on the time where hours 7 thru 11 will display AM while all other hours will display PM (ex: 9:00 will be AM while 4:00 will display PM). If the value does not display correctly then change it using Up-Down arrows or from the drop-down list or by pressing A or P keys.

**By:** Name of employee(s) or crew that completed the Work Order. There are potentially two "By" fields... a drop-down list to select an Employee Code and a field for the name (note: the drop-down list will be disabled if Employee Codes have not been previously set up). The employee name can be entered manually in the second field or user may choose an Employee Code by selecting records from the drop-down list (assuming Employee Code records have been previously set up). If choosing an Employee Code from the drop-down list the name will be displayed automatically but can be changed. When using Employee Codes user may later print reports based on the code whereas if the name is typed manually reports this can not be done.

**Meter Readings:** If the Work Order involved getting new meter readings, enter the reading(s) on the appropriate line.

**Gas Metr Actions:** If the work order is for the Gas dept, certain gas-related options are made visible. When "Completed" is checked then the fields are enabled.

**Updt Cust Acct:** If the Utility Customer Acct should be updated as a result of this Work Order then check this box. This box will always be disabled if the question "Updt Cust on completed WO" in Options-General is unchecked or there is no customer account# entered above.

**Remarks:** Enter any misc remarks about the completion on up to 11 "scroll" lines.

After answering the above questions, the "Save" command will add the Work Order to the Work Order file while the Esc key (or Cancel command) will void the entry. Upon saving (depending upon a setting in Options) the user will be asked whether a Work Order form should be printed. Select "Yes" to print or "No" to not. If "Yes" is selected a Work Order will print. If for any reason the Work Order does not print properly user may (while Work Order is displayed) click on the printer icon at the top of the screen or may select "Print" and "Work Order on Screen" to re-print.



## **Edit**

To edit a Work Order user must first access a record as described under "Work Order Entry". Once a Work Order displays user may select "Edit" (Alt-E) to make changes. User would normally "point and click" to access the field to be changed. When making changes notice that when you enter a value in a field that already has a value the field may be cleared. If you do not want to clear the entire field but only change a portion of it then arrow over to the area to be changed and then enter the correction. The Esc key (or Cancel command) may be used to start the edit over. The "Save" command will rewrite the revised data to disk thereby making it permanent.

Normally the "**Completion**" info defined above is entered using the "Edit" function. When the "Completed" box is checked and the Work Order has a valid utility account# and user has checked the "**Updt Cust Acct**" box the program will (upon selecting "Save") open a screen with check boxes that allows user to make changes to readings, reading dates, or the "Status" on the Customer Acct screen. Placing a check in the appropriate boxes performs the described function and unchecking the box returns to the original value. The boxes include:

*Update Current Reading(s):* moves any meter reading entered into the Completion section into the corresponding meter's current reading field. Unchecking restores original value.

*Update Previous Reading(s):* moves any meter reading entered into the Completion section into the corresponding meter's previous reading field. Unchecking restores original value.

*Update Current Reading Date:* moves the Completion date into the "Curr Rdg Date". Unchecking restores original value.

*Update Previous Reading Date:* moves the Completion date into the "Prev Rdg Date". Unchecking restores original value.

*Update Status:* allows user access to the "Status" drop-down list to change status. Unchecking restores original value.

*Enable All Meter Fields:* allows user to have access to all meter fields and dates.

Upon completing the updates user should select "Save and Exit" to update. "Cancel" command voids any changes.

The "Updt Cust Acct" function is not designed to be an all inclusive way of making changes to the Customer Acct. As a result of a Work Order there could be other changes needed to the customer acct such as changing the acct# or mailing address but it is not practical to make those changes using the Work Order program. Use the regular Utility Billing Customer Accts "Edit" routine to make any other needed changes.

If after saving the edited info you would like to print the revised Work Order, select the printer icon at top of screen or select "Print" (Alt-P) and then "**Work Order on Screen**". If you want more than one copy to print you will do this more than once.

## **Delete**

To delete a **single** Work Order user must first access a record as described under "Work Order Entry". Once a Work Order is found user may select "**Delete**" (Alt-D) and then "**WO on Screen**". After selecting, the program will sound an audible alarm asking user whether the Work Order should be deleted. Select "Yes" to delete or "No" to not.

To delete Work Orders by **date** select "**Delete**" (Alt-D) and then "**By Date**". User must then enter begin and ending dates. If you want to delete the oldest Work Orders enter 0 for the begin date. Make sure the ending date is not past the time period you want to delete thru. The checkbox "**Delete Completed WOs Only**" should be checked if only "Completed" Work Orders within the date range should be removed. Uncheck the box if all Work Orders within the date range should be deleted.

## **Print**

Upon selecting "Print" (or Alt-P) the program allows three options... 'Work Order on Screen', 'Report', or 'Screen'. "Work Order on Screen" prints a Work Order for the displayed record so a Work Order must be displayed at the time this is selected. "Report" allows user to print a list of Work Orders. "Screen" prints an image of the screen. Upon selecting "Report" the following screen displays:

```

=====
==Print Work Orders=====
| Report Type:          Print Order:          Ranges/Options:          |
| o Work Order List    o Work Order#          Beg WO#: 000000          |
|                       o Name                    End WO#: 999999          |
| o Work Order Full    o Location              Beg Name/Loc: _____|
|                       o Employee Code          End Name/Loc: zzzzzzzzzzzz|
| Depts                Tasks                      |
| Select All          Select All              Beg WO Date: 00/00/000   |
|                       End WO Date: 99/99/99          |
| Clear All          Clear All              |
|                       Beg WO Compl Date: 00/00/00      |
| _Water/Sewer         _Re-Read                End WO Compl Date: 99/99/99|
| _Electric            _Turn-on                |
| _Gas                 _Turn-off              Beg Employee Code: _____|
| _Street              _Install/Repair        End Employee Code: ZZZZ   |
| _Sanitation          _Transfer                |
| _Cemetery            _Other Tasks           Catgy: _____          |
| _Park/Rec            Beg Cd: _____      _Include Uncompleted WOs  |
| _Other               End Cd: _____      _Include Completed WOs   |
| o Match any dept     o Match any task       Loc Keyword: _____   |
| o Match all depts    o Match all tasks     Blank Lines: 0 _New Page/Emp Cd|
| Printer:                                                     |
| Font: _____ Size: _____                          |
|                                                                 Print   Close |
| Orientation:         Set      _Print to Screen          |
=====

```

User would answer questions as follows:

- Report Type:** There are 2 report types. "Work Order List" means to print a "short" list of Work Orders (1 line per record). "Work Order Full" means to print the entire Work Order record which would be a longer report.
- Print Order:** There are 4 choices. "Work Order #" prints the records in WO# order while "Name" prints in Name order, "Location" prints in Location order, and "Employee Code" prints the records in Emp Code order (assuming you are using Employee Codes and including completed Work Orders).
- Depts:** To include work orders for a given dept check the dept name. To help select boxes there are "Select All" and "Clear All" commands. "Clear All" would uncheck all depts while "Select All" would check all depts. Note: at least one dept must be selected.
- Match Any or All:** When the program looks at the depts selected the program needs to know whether to print any work order that has all the selected depts or any of the depts. For example if "Water/Sewer" and "Electric" are checked selecting "Any" means any work order having either of those depts would be included while "All" means the work order would only be included if the work order has both (All) depts.
- Tasks:** To include work orders for a given task check the task name. To help select boxes there are "Select All" and "Clear All" commands. "Clear All" would uncheck all tasks while "Select All" would check all tasks. Note: at least one task must be selected.
- Match Any or All:** When the program looks at the tasks selected the program needs to know whether to print any work order that has all the selected tasks or any of the tasks. For example if Turn-on and Turn-off are checked selecting "Any" means any work order having either of those tasks would be included while "All" means the work order would only be included if the work order has both (All) tasks.

**Beg/End WO#:** If the list should only include a range of work order#s, enter a beg/end number. If the list should not be restricted based on the work order# leave the defaults as 000000 and 999999.

**Beg/End Name/Loc:** Applicable only if printing in name or location order. If the list should only include a range of names or locations then enter a beg/end name or location. If the list should not be restricted based on the name or location then leave the defaults as spaces and zzzzzzzzzzzz.

**Beg/End WO Date:** If the list should only include a range of work order dates enter a beg/end date. If the list should not be restricted by on the work order date leave the defaults as 00/00/00 and 99/99/99.

**Beg/End WO Compl Dt:** Applicable only if "Completed" work orders are being included. If the list should only include a range of work order **completed** dates then enter a beg/end completed date. If the list should **not** be restricted based on the completion date then leave the defaults as 00/00/00 and 99/99/99.

**Beg/End Employee Code:** Applicable only if "Completed" work orders are being included. If the list should include **completed** work orders for a range of employee codes, enter beg/end employee codes. If the list should **not** be restricted based on the employee code then leave the defaults as blank and ZZZZ. To print a report for only completed work orders, uncheck "Include Uncompl WOs" and enter a range of employee codes. If there are work orders without employee codes that you do not want included, enter "1" as the "Beg" code.

**Catgy:** If "Other Tasks" are being included the user might want to only include those with a specific catgy. If so enter the Catgy desired. Leaving it blank means the catgy is not applicable.

**Include Uncompl WOs:** Work Orders are either **Uncompleted** or **Completed**. Checking this box means that uncompleted work orders should be included. Uncheck this box if uncompleted work orders should not be included.

**Include Compl WOs:** Work Orders are either **Uncompleted** or **Completed**. Checking this box means that completed work orders should be included. Uncheck this box if completed work orders should not be included.

**Loc Keyword:** Applicable if printing in "Location" order. Whatever value is entered will be used by the program to find a match in the location. For example if MAPLE is entered then only locations with the word MAPLE will be included. **Leaving this blank means that the records will be printed in regular location order.**

**Blank Lines (0-3):** Applicable to the "List" report only. This value allows user to single(0), double(1) or triple(2) space the report. User may select the value by entering the value, using down-arrow to scroll thru choices, or selecting from the drop-down list.

**New Page/Emp Cd:** Applicable only if printing in Employee Code order. Checking this box tells the program to place each employee's work orders on a separate page.

**Printer Info:** see Printer Settings discussion in Section 3.

After answering the above questions, the "Print" command will begin the report. Depressing Esc key or selecting "Close" or "X" will exit the routine without printing.

### Main Menu

Selecting this command (Alt-M) will cause the program to be exited and returned to the Main Menu (same as selecting "X"). If user is entering a receipt this command is disabled until the receipt is saved.

### Help

Selecting this command (Alt-H) will display summary information about this program. A "Print" command is provided to print the information to your default printer.



## Edit

If changes are needed on an existing record user must first select the record from the list on the left side of the screen and then "Edit" (Alt-E) must be selected. User may 'point and click' to select the field to be edited or Tab/Enter keys may be used to move a field at a time. Notice that when you enter a value in a field that already contains a value the field will be cleared. If you do not want to clear the entire field but only change a portion of it then arrow over to the area to be changed and then enter the correction. Esc key or the Cancel command may be used to start the edit over. Selecting the "Save" command will rewrite the revised data to disk thereby making it permanent.

## Delete

To delete an existing record user must first select the record from the list on the left side of the screen and then "Delete" (Alt-D) must be selected. Upon selecting "Delete" the system will display a message asking user whether the record should be deleted. Select "Yes" to delete or "No" to not.

## Print

Upon selecting "Print" (Alt-P) the program allows two options... 'Report' or 'Screen'. "Screen" prints an image of the screen to your default printer. "Report" allows user to print a list of Task records to the printer if needed. Upon selecting "Print" (or the printer icon) the following screen displays:

```
====Print=====
|               Print Order:           |
|               o Code                 |
|               o Description          |
|               |                       |
|               Beg Code: _____ |
|               End Code: ZZZZ        |
|               |                       |
|               Beg Desc: _____ |
|               End Desc: ZZZZZZZZZZZZZZZZZZZ |
|               |                       |
|               Category: _____ |
|               |                       |
|               Printer                 |
|               |                       |
|               Font _____ Size   |
|               |                       |
|               Orientation              |
|               |                       |
|               _____ Set  _Print to Screen |
=====
```

User would answer questions as follows:

- Print Order:** select "Code" to print the list in Task code order or "Description" to print in Task description order.
- Beg Code:** if user would like just a partial listing and you are printing in code order, enter the code to start with. Leaving the beginning code as blank means to start with the lowest code.
- End Code:** if user would like just a partial listing and you are printing in code order, enter the code to end with. Leaving the ending code as ZZZZ means to print thru the highest code.
- Beg Desc:** if user would like just a partial listing and you are printing in desc order, enter the desc to start with. Leaving the beginning desc as blank means to start with the lowest desc.
- End Desc:** if user would like just a partial listing and you are printing in desc order, enter the desc to end with. Leaving the ending desc as ZZZZZZZZZZZZZZZZZZZ means to print thru the highest desc.

**Category:** If you entered Category codes on the Task Code records and you want a list of just codes with a specific Category, enter the Category.

**Printer Info:** see Printer Settings discussion in Section 3.

After answering the above questions, the "Print" command will begin the report. Pressing Esc key or selecting "Close" or "X" will exit the program without printing.

### **Main Menu**

Selecting this command (or Alt-M) will cause the program to be exited and returned to the Main Menu (same as selecting "X"). If user is adding/editing a record this command is disabled until the record is saved.

### **Help**

Selecting this command (or Alt-H) will display help information about this program. A "Print" command is provided to print the information to your default printer.

## SECTION 6 EMPLOYEE CODES

This program is used to maintain or print "Employee" records. These records are optional since the employee name on the Work Order can in theory just be entered manually. The purpose of Employee records are to establish employee names to **automatically** place on Work Orders. Giving an employee a short code can make placing an employee name on a Work Order much quicker and Work Orders containing employee codes can be printed by those codes. After choosing the Employee Codes program the following screen appears:

```
==Employee Codes=====
| Add  Edit  Delete  Print  Main Menu  Help  |
|-----|
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|                                          |
|          Code: _____ |
|          Name: _____ |
|          Misc: _____ |
|                                          |
|                                          |
|                                          |
|          Save    Cancel    Exit  |
|-----|
=====
```

### Add

To add a new Employee Code user should select "Add" (Alt-A). The right-side of the screen (shown above) should then be filled in by user. Following is an explanation of each field:

**Employee Code:** This code will be used to refer to a given employee or group of employees (ex: ELECT CREW). The code can be letters and/or numbers. This code must be a unique code and can not be used on more than one record. User might want to make the code be an abbreviation of the name (ex: JCB could be used for JESSE C BROWN). **The program works best if user uses the same number of digits or characters in each code. For example all codes have 3 or 4 characters.**

**Name:** The name of the employee(s) or crew.

**Misc:** Any additional info for this employee (ex: dept employee works in).

After answering the above questions, the "Save" command will update the Employee Code file. Pressing Esc key or selecting "Cancel" will cancel the entries.

### Edit

If changes are needed on an existing record user must first select the record from the list on the left side of the screen and then "Edit" (Alt-E) must be selected. User may 'point and click' to select the field to be edited or Tab/Enter keys may be used to move a field at a time. Notice that when you enter a value in a field that already contains a value the field will be cleared. If you do not want to clear the entire field but only change a portion of it then arrow over to the area to be changed and then enter the correction. Esc key or the Cancel command may be used to start the edit over. Selecting the "Save" command will rewrite the revised data to disk thereby making it permanent.

### Delete

To delete an existing record user must first select the record from the list on the left side of the screen and then "Delete" (Alt-D) must be selected. Upon selecting "Delete" the system will display a message asking user whether the record should be deleted. Select "Yes" to delete or "No" to not.

## Print

Upon selecting "Print" (Alt-P) the program allows two options... 'Report' or 'Screen'. "Screen" prints an image of the screen to your default printer. "Report" allows user to print a list of Employee Code records to the printer if needed. Upon selecting "Print" (or the printer icon) the following screen displays:

```
====Print=====
|               Print Order:                |
|               o Code                      |
|               o Name                      |
|
|               Beg Code: _____        |
|               End Code: ZZZZ              |
|
|               Beg Name: _____        |
|               End Name: ZZZZZZZZZZZZZZZZZ|
|
|               Printer                     |
|_____|_____|
|               Font                      Size|
|_____|_____|
|               Orientation                |
|_____|_____| Set | Print to Screen    |
=====
```

User would answer questions as follows:

- Print Order:** select "Code" to print the list in employee code order or "Name" to print in Name order.
- Beg Code:** if user would like just a partial listing and you are printing in code order, enter the code to start with. Leaving the beginning code as blank means to start with the lowest code.
- End Code:** if user would like just a partial listing and you are printing in code order, enter the code to end with. Leaving the ending code as ZZZZ means to print thru the highest code.
- Beg Name:** if user would like just a partial listing and you are printing in name order, enter the name to start with. Leaving the beginning name blank means to start with the lowest name.
- End Name:** if user would like just a partial listing and you are printing in name order, enter the name to end with. Leaving the ending name as all Z's means to print thru the highest name.
- Printer Info:** see Printer Settings discussion in Section 3.

After answering the above questions, the "Print" command will begin the report. Pressing Esc key or selecting "Close" or "X" will exit the program without printing.

## Main Menu

Selecting this command (or Alt-M) will cause the program to be exited and returned to the Main Menu (same as selecting "X"). If user is adding/editing a record this command is disabled until the record is saved.

## Help

Selecting this command (or Alt-H) will display help information about this program. A "Print" command is provided to print the information to your default printer.



## SECTION 7 OTHER FUNCTIONS

This menu choice allows access to programs which are used to set up perform certain miscellaneous functions. After choosing the Other Functions menu the following choices display:

**File Repair**  
**Clear Registry**

User should select the routine desired.

### **File Repair**

This command would be used in rare cases when the Receipt or Category Code files might get corrupted from power outage or computer malfunction. **You should not attempt to run this program without assistance from GFC Data Systems.**

### **Clear Registry**

On rare occasions printer or display settings might need to be reset (cleared). For example if suddenly the wrong printer or font name begins displaying on your print screens it is easier to reset all the printer settings at one time rather than change printer settings one screen at a time. You must confirm the program should be run - click on Yes to clear or No to cancel. Display size settings will also be reset so some 'LookUp' or 'Print to Screen' screen and column heights and widths may need to be adjusted.

## SECTION 8 OPTIONS

This program is used to enter recurring settings that control the behavior of other Work Order routines.

After choosing the Options menu appears:

### **General Work Order Printer**

User should select the routine desired.

### **General**

The purpose of this routine is store information regarding entering and printing Work Orders. This information can be set up once and then the program can refer to it when needed. Upon selecting "General" the following screen appears:

```

=====Options=====
| Work Order Options:          | Paths:                                |
| _ Auto-WO#                  |           Path Name Cat Cd          |
| _ Edit WO#                  | Utility 1: _____              |
| _ Updt Cust Acct on completed WO | Utility 2: _____              |
| _ Print Work Orders         |                                       |
| # Work Orders _            | -Passwords:-----                |
| Next WO#: _____       | Passwords          Retype          |
| Top Margin (inches): _____ | Master: _____                |
| Left Margin (inches): _____ | Rd-Only: _____                |
| Name: _____           |                                       |
| Addr 1: _____         |           Save      Close          |
| Addr 2: _____         |                                       |
| Addr 3: _____         |           Print                    |
=====

```

User should answer the following questions:

- Auto-WO#: when entering Work Orders, the system allows entry of a Work Order number. If this number should be automatically entered, incremented, and stored, user should check this box. Un-checking this box will cause the Work Order# to start over at 1 each session.
- Edit Work Order#: if user should be allowed to change the Work Order number during posting, check this box. If un-checked the Work Order number field will not be accessible when posting.
- Updt Cust Acct on Completed WO: when a utility-related Work Order is completed this may result in the need to change a reading or a reading date on the Customer Acct screen. If user would prefer that this capability never be used then leave this box unchecked. If the capability is desired then check this box. User will still have to click on a check box on the Work Order screen to initiate the action.
- Print Work Orders: since users may want to post Work Orders but not print a form, you can un-check this question to not print Work Order forms. Check this box to print forms. If checked user will be asked at entry time whether a Work Order should be printed. If un-checked then the user will never be asked.

# Work Orders: if printing Work Orders you may want to print more than one. Therefore this drop-down list allows user to choose the number of Work Orders to print (1 thru 3).

Next WO#: if work order numbers are being carried over day to day this is the next number. On an initial installation the value would be set to 000001.

Top Margin: this is the amount of space (in inches) that the program will advance from the top of the page before printing the Work Order form. On an initial installation 0.200 could be used. User can adjust this value to be more or less later.

Left Margin: this is the amount of space (in inches) that the program will move the print from the left side of the page when printing the Work Order form. On an initial installation 0.200 could be entered. User can adjust this value to be more or less later.

Name/Addr(1-3): if printing Work Order forms, the name prints at the top of the form. The addresses are not currently used so entry is optional.

Utility Paths (1-2): since the Work Orders program can interface with GFC's Utility Billing program, the program needs to know where the Utility files are located. Normal response would be \UTIL\ but could be \UTIL2\ if a second set of files are used. You should consult with your installer if you are not sure of the proper entry.

Path Names (1-2): a meaningful path name can be assigned to each of the Utility Paths. For example "Utility" or "Water" or "Sewer" could be entered to help user identify the files in each path. A name should only be entered for lines that contains an actual path.

Task Cd(1-2): these values are unused at this time.

Passwords: if needed, user may enter a password that would have to be entered to get into the program. Since the entry can not be seen as it typed, the user must repeat the password. If the entries do not match then the password must be typed twice again. The 'Master' password allows user access to all functions whereas the 'Rd-Only' only allows for viewing records.

After answering the above questions, selecting "Save" will update the Options screen. Pressing Esc or selecting "Cancel" or "X" will leave the questions unchanged.

### Work Order Printer

The purpose of this routine is set up information regarding the printer to be used for printing the Work Order form. Since the Work Order form prints without asking for any printer information, the needed information must be set up in advance as to which printer, font name, font size is needed. Upon selecting this command the following screen displays:

```

WO Printer Setup
=====
| Printer |
|-----|
| Font           Size |
|-----|
| Orientation |
|-----|
| Save      Cancel |
=====

```

See section 3 (Printer Settings) for more information regarding printer information. Upon changing the above setting user should select "Save" to permanently save the new settings or "Cancel" (or "X") to not save.