iWorQ
Work Management
Quick Start Guide

Welcome to Work Management

iWorQ is designed so you can customize the software to meet your Work Management needs. This guide was created to help you start performing common tasks in the Work Management system through step-by-step explanations and screenshots.

For additional help or questions, please call technical support at **1-888-655-1259.**

TECHNICAL SUPPORT AND TRAINING IS ALWAYS FREE!

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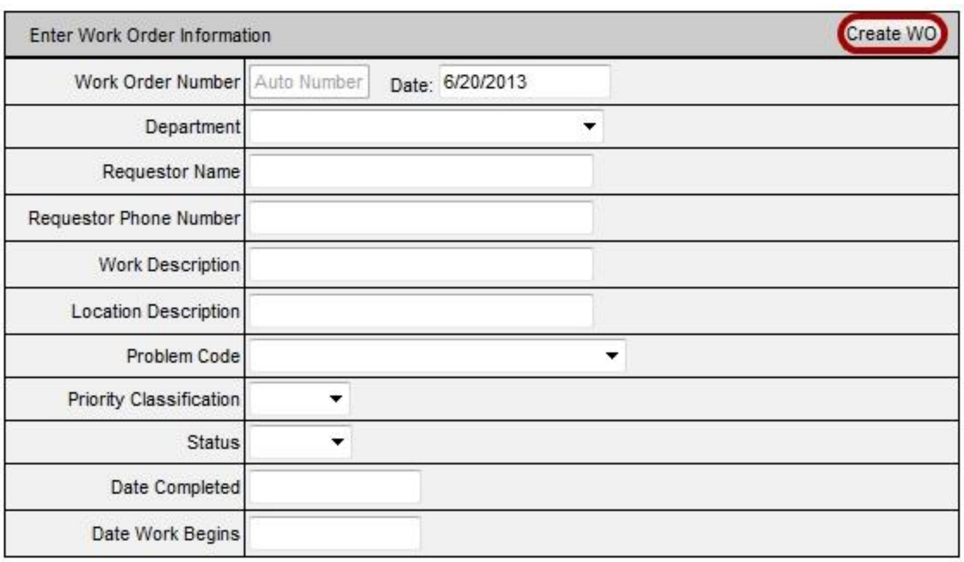
Creating/Managing Work Orders

This page displays all the work orders that are in your system. Here is where you create, edit, and manage work orders. This page shows all the work orders created over a certain time-period.

Adding a New Work Order

1. Click the Work Orders tab located near the top left of the screen.

2. Click the Create WO button located in the submenu beneath the tabs. A new window will open.



3. Fill out the work order information. This can be changed later if necessary.

4. Click the Create WO button at the top-right of the screen.

5. Repeat steps 2 – 4 to create additional work orders.

NOTE

Once the case is created, more features become available; such as Email Work Order, Add Notes, Add Material, Upload File, Etc.

NOTE

To add additional fields or items to the drop down menus see page 17.

The Work Order Interface

The History button shows a record of every change made to the work order, who changed it, and when.

The Save button saves your changes. If you do not click save before closing the window, no changes will be made.

The Copy Work Order button creates a copy of the work order, assigns it a new number, and immediately displays the new work order.

Each work order is assigned an automatic number, which is displayed here.

The Create Template button creates a template for work orders. It can be accessed from the Work Orders screen.

The Note button opens a window to write additional notes concerning the work order.

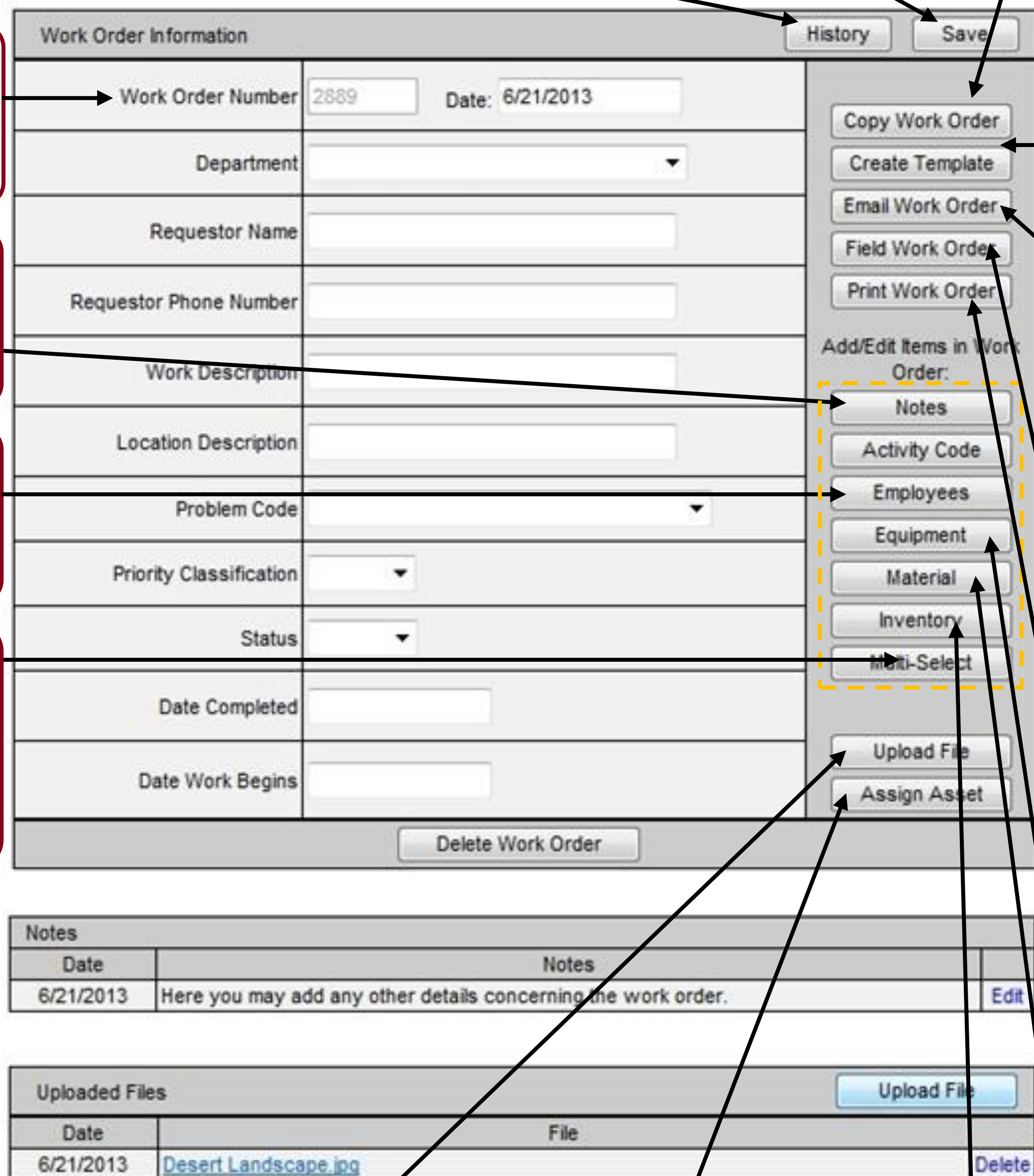
The Email Work Order button allows you to email the work order to employees.

The Employee button allows you to assign certain employees to a work order.

The Field Work Order button creates a printable field copy of the work order.

The Multi-Select button allows you to add employees, equipment, materials and/or inventory at once from one window.

The Print Work Order button allows you to print all the data recorded in the



The Equipment button allows you to assign certain equipment to a work order.

NOTE

Your pop-up blocker must allow pop-ups from iWorQ or many of these buttons will not work.

The Material button allows you to assign materials to a work order.

The Upload File button allows you to attach pdf, jpeg, word, excel, and other files to the work order. The maximum file size is 3MG. Jpeg files are automatically compressed.

The Assign Asset button allows you to assign assets to each work order.

The Inventory button allows you to assign certain inventory to a work order.

Viewing and Editing Your Preferences

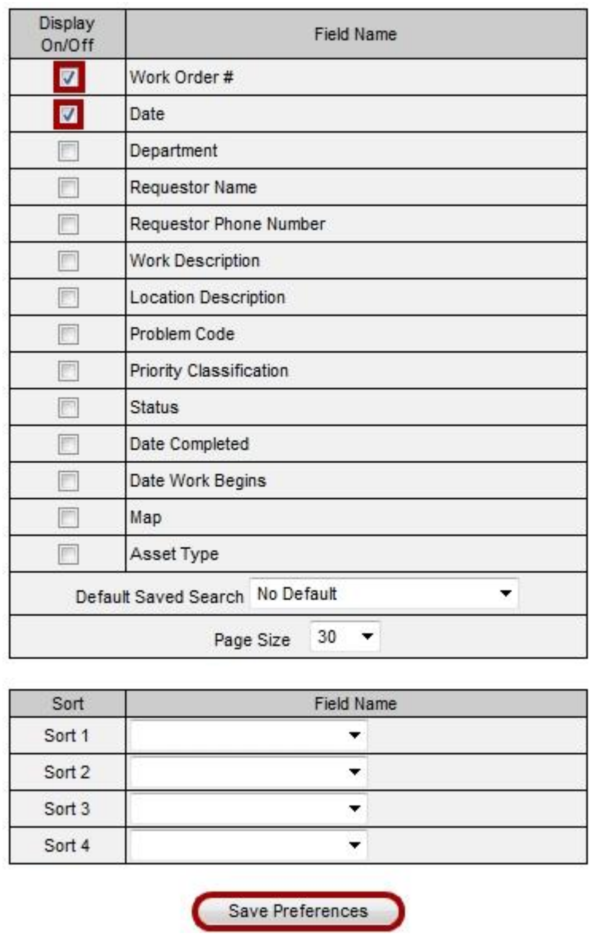
Each user has their own Viewing Preferences. These unique preferences are automatically loaded every time you log in.

1. Click the Work Orders tab located near the top left of the screen.

2. Click Edit Preferences under the Tools section on the right side of the screen. A separate window will open.

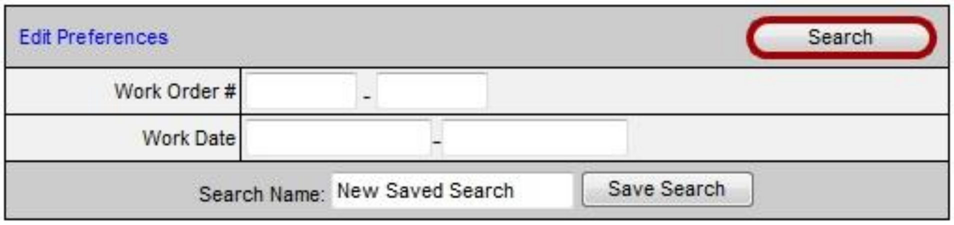
3. In the new window, check the boxes next to the information that you want to view and pick any specific sorts you'd like applied to the information.

4. Press Save Preferences once you have picked your desired format. The Search Results screen will reload showing the information



Simple Search

The simple search allows you to search your work orders according to work order number and date.



1. Under the Work Orders tab click on Simple Search. A new window will open.

2. Enter which work order number(s) and/or the date range you would like to search. Then press the Search button.

Advanced Search

The search feature in Work Management is extremely flexible. You can search by nearly every data field in your application. The following steps will guide you through executing an advanced search.

NOTE

Each of the tabs in Work Management has search criteria that isn't included in the advanced search.

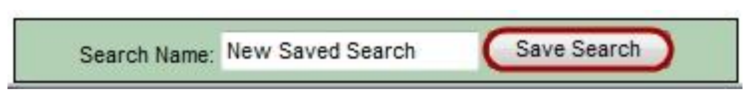
1. Under the Work Orders tab click on Advanced Search. A new window will open.

2. You can search all work orders by any criteria listed in the Advanced Search window. Once you have selected the desired criteria, press the Save button at the top of the window.

Saved Search

If you will be searching the same criteria often, there is a Save Search option.

1. Once you have selected your desired search criteria in either the Simple Search or Advanced Search window, press Save Search at the bottom of the window. To the left of the Save Search button is a field to name your saved search.



2. Saved searches will allow you to run reports on certain work orders. For example, if you want to run a report on only the 'open' work orders, you can create a saved search for those work orders and use it in the report.

Employee Information

This page shows a list of the employees who are entered into your application.

Adding an Employee

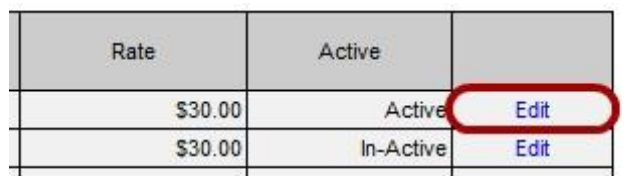
NOTE

The email is only necessary for employees who will be receiving their work orders via email.

1. Under the Employees tab, press Add Employee in the upper left corner of the screen.

2. A new window will open. Fill out the employee information. Click Add when finished.

3. To edit or delete an employee, press the Edit button to the right of the intended employee. In the new window, press Delete or make any desired changes and press Save.



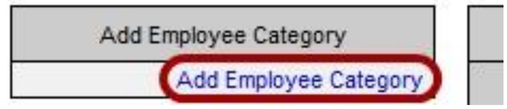
NOTE

You cannot delete an employee who has work orders attached to them. Instead, list them as In-Active (the last field in the edit window).

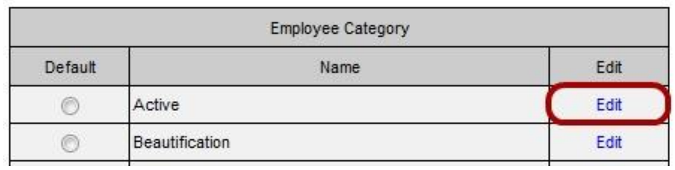
Adding an Employee Category

1. Under the Employees tab, press Add Employee Category in the upper left corner of the screen.

2. A new window will open. Enter the new category and click Add.

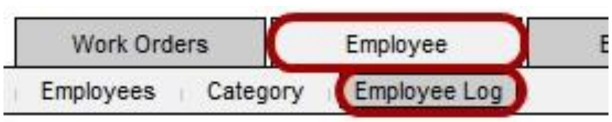


3. To edit or delete an employee category, press the Edit button to the right of the intended category.

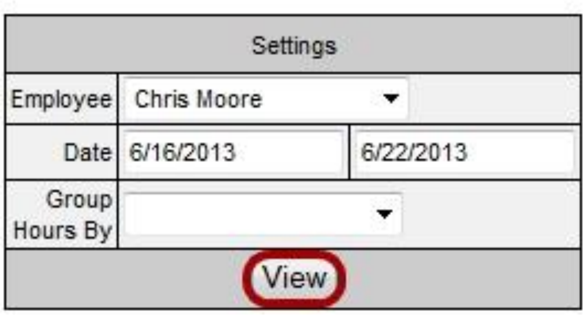


4. In the new window, press Delete or enter the new category name and press Save.

Checking the Employee Log



1. Under the Employees tab, click the Employee Log button located in the submenu.



2. Choose the employee and date range you would like to search. Then press View.

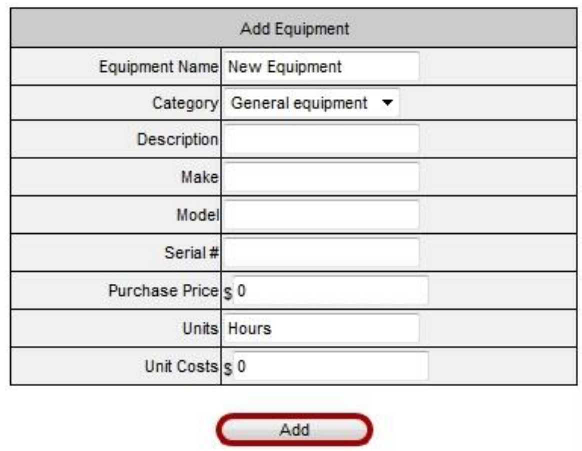
3. The search results will show the daily total of hours during the specified date range for the employee.

Equipment Information

This page shows a list of the equipment entered into your application.

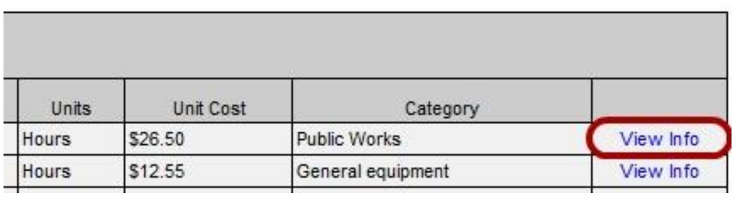
Adding Equipment

1. Under the Equipment tab, in the upper left corner of the screen, click Add New Equipment.

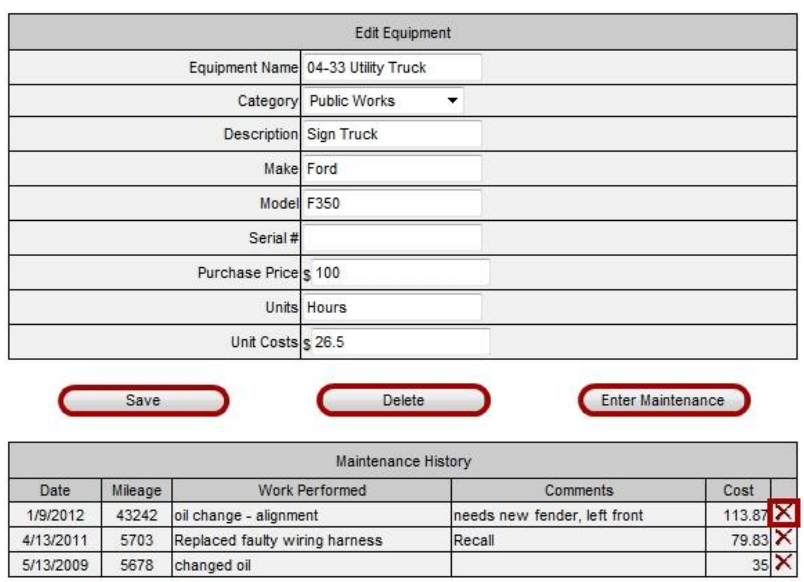


2. In the new window, enter the equipment information. Then press Add.

3. To edit or delete equipment, click the View Info button to the right of the equipment.



4. A new window will open. From here you can edit any of the equipment information, delete the equipment, view the maintenance history, enter new maintenance, or delete maintenance already entered. When finished editing, press Save.



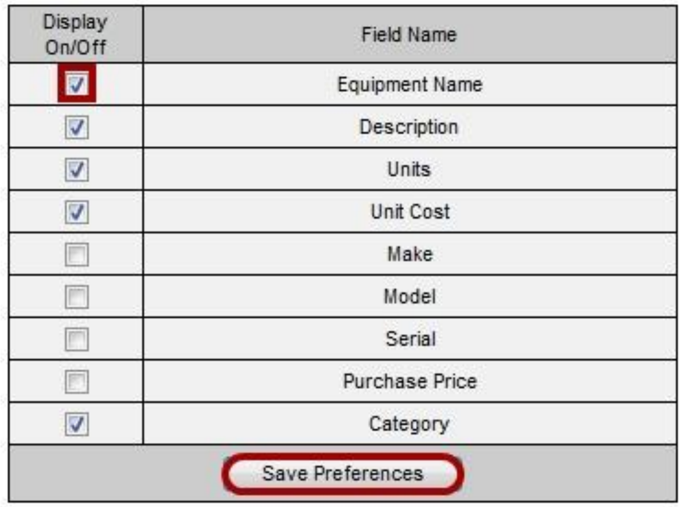
NOTE

You cannot delete equipment that has work orders attached to it. However, you may create a new category (see pg 10) named In-Active to place equipment in when it's no longer being used.

Managing Equipment Preferences

1. Under the Equipment tab, in the upper left corner of the screen, click Preferences.

2. A new window will open. From there you can select which fields you would like to have show under the Equipment tab by checking the box to the left of the Field Name. Press Save Preferences when you're finished.

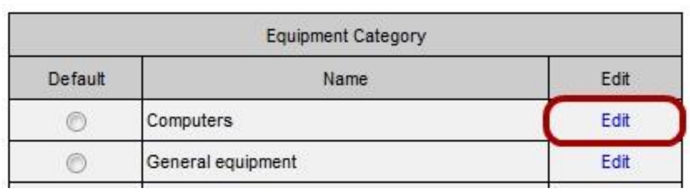


Adding Equipment Categories

1. Under the Equipment tab, click Category. In the upper left corner of the screen, click Add Equipment Category.

2. In the new window, enter the category name and press Add.

3. To edit or delete categories, click the Edit button to the right of the equipment category.



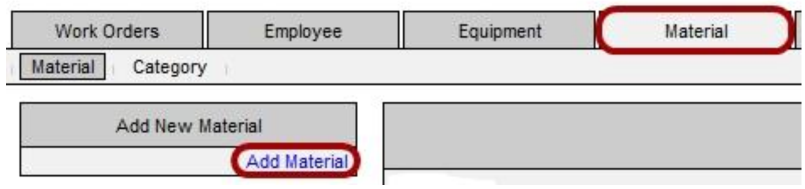
4. Enter the new category name and press Save. Or press Delete.

Material Information

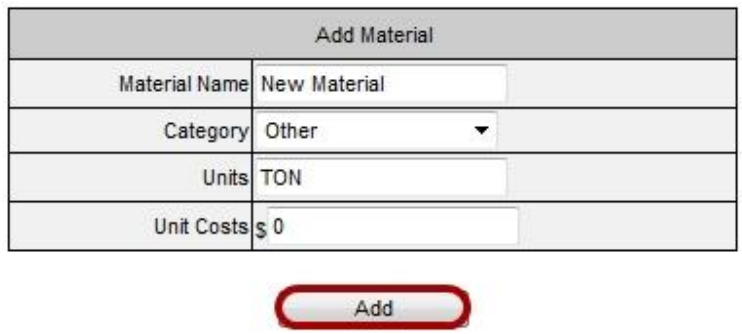
This page shows a list of the materials that are entered into your system.

Adding Materials

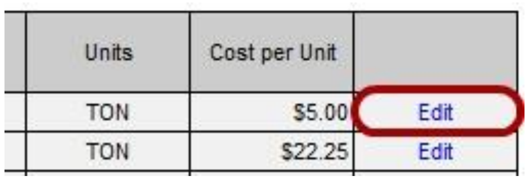
1. On the Material page under the Material tab, click Add Material in the top left corner of the screen.



2. A new window will open. In the new window, enter the new material information. Then press Add.



3. To edit or delete existing materials, click the Edit button to the right of the material you want to edit or delete.



4. A new window will open. Press Delete or make the necessary changes and press Save.

NOTE

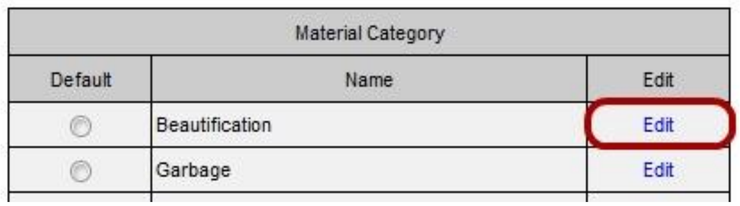
You cannot delete materials that have work orders attached to them. However, you may create a new category (see pg 12) named In-Active to place materials in when they're no longer being used.

Adding Material Categories

1. Under the Material tab click Category. In the upper left corner of the screen press Add Material Category.

2. A new window will open. Enter the new material category name and press Add.

3. To edit or delete existing categories, press the Edit button to the right of the category you want to edit or delete.

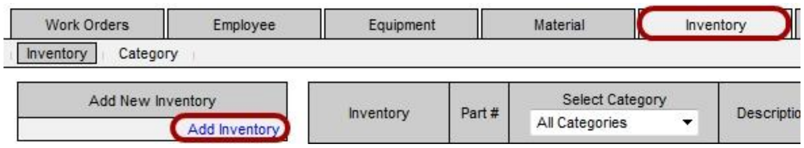


4. A new window will open. Press Delete or make the necessary changes and press Save.

Inventory Information

This page shows a list of the inventory that is entered into your system.

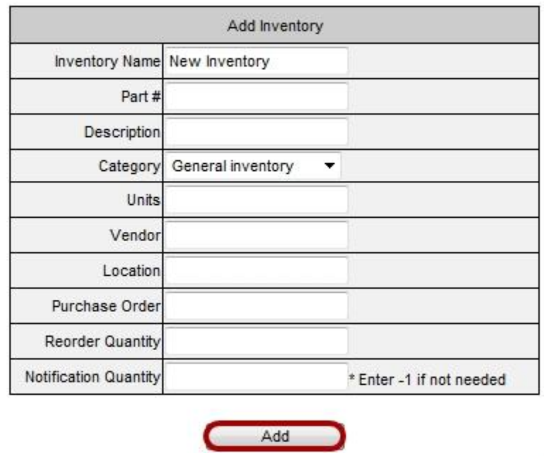
Adding Inventory

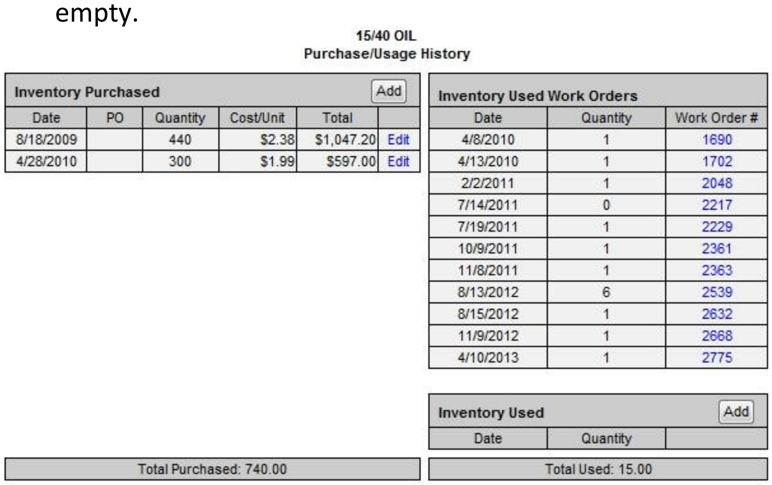


1. Under the Inventory tab, in the upper left corner of the screen, click Add Inventory. A new window will open.

2. In the new window, enter the new inventory information. When finished, click Add. A new window will open.

3. This new window displays the details of that particular part (past purchases and the date and quantity of it used). If it is a new part to inventory, this window will be empty.





15/40 OIL
Purchase/Usage History

Inventory Purchased (Add)

Date	PO	Quantity	Cost/Unit	Total	
8/18/2009		440	$2.38	$1,047.20	Edit
4/28/2010		300	$1.99	$597.00	Edit

Total Purchased: 740.00

Inventory Used Work Orders

Date	Quantity	Work Order #
4/8/2010	1	1690
4/13/2010	1	1702
2/2/2011	1	2048
7/14/2011	0	2217
7/19/2011	1	2229
10/9/2011	1	2361
11/8/2011	1	2363
8/13/2012	6	2539
8/15/2012	1	2632
11/9/2012	1	2668
4/10/2013	1	2775

Inventory Used (Add)

Date	Quantity

Total Used: 15.00

4. You can also get to this window by clicking the Details button to the far right of the particular inventory part.

Average Cost/Unit	Inventory Value 6/21/2013	Notification Quantity		
$31.65	$55,286.60	8	Details	Edit
$6.00	$120.00	2	Details	Edit

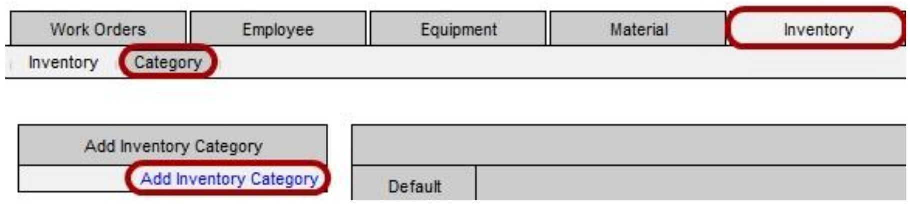
5. The Edit button to the right of the Details button opens a window in which you can edit the inventory information or delete the inventory part. Press Save when you are done editing or press Delete.

NOTE

You can set a notification to display when an inventory part reaches a certain quantity. Enter the quantity in the bottom field of the Add or Edit Inventory windows. If you do not need a notification, enter -1.

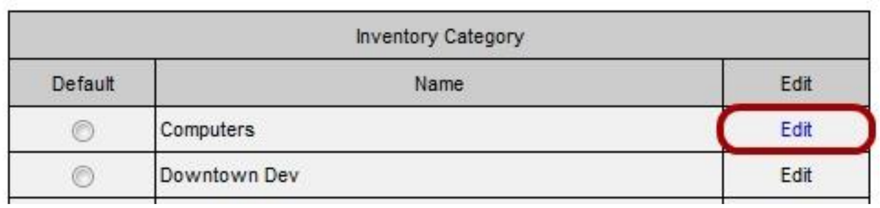
Adding Inventory Categories

1. Under the Inventory tab click Category. In the upper left corner of the screen press Add Inventory Category.



2. A new window will open. Enter the new inventory category name and press Add.

3. To edit or delete existing categories, press the Edit button to the right of the category you want to edit or delete.



4. A new window will open. Press Delete or make the necessary changes and press Save.

NOTE

You cannot delete inventory that has work orders attached to it. However, you may create a new category (see this page) named In-Active to place inventory in when it's no longer being used.

Data Fields

iWorQ is customizable to your work management needs. The following steps will explain how to edit your data fields to create just what you need.

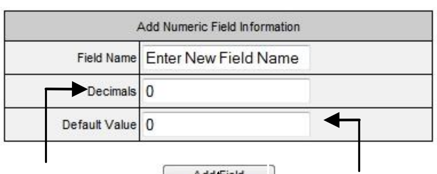
Adding Fields

1. You can add data fields to your work order information under the Fields tab.

2. In the top left corner of the screen you can add a Numeric, Lookup, Text, or Date Field. Click on which field type you want to add. The screenshots below explain each type.

Numeric Field

Accepts numbers and decimals only



The number of decimal places that will be shown

Click Add Field to create the new numeric field.

This number automatically appears in this field when a new case is

Text Field

Accepts text, symbols, and numbers

Click Add Field to create a new text field

This text automatically appears in the field when a new case is created.

Date Field

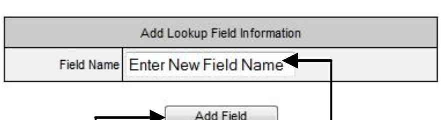
Accepts numbers formatted as dates

Click Add Field to create a new date field

This date automatically appears in this field when a new case is created.

Look-up Field

Creates a drop down box

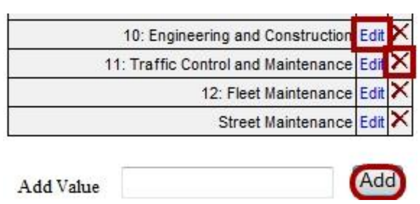


Click Add Field to create a new look-up field

This value automatically appears in this field when a new case is created.

Adding Values to a Look-up Field

The drop down box will appear blank until values have been added.



1. Click the Values button and a new window will open.

2. Type a new value and click Add. You can edit the values by clicking the Edit button or delete them by using the 'X'.

Editing and Deleting Fields

1. Click the Edit/Delete button in the row of the field you would like to change.

Field		Lookup Values	Type	Order	
Department	Edit/Default	Values	lookup	1	⬇
Requestor Name	Edit/Default		text	2	⬆ ⬇
Requestor Phone Number	Edit/Default		text	3	⬆ ⬇

2. A new window will open. In the new window enter the changes and press the Save button or press the Delete button.

Edit Field	
Field Name	Department
Default Value	

Save Delete

NOTE

You cannot delete fields that have work orders attached to them.

Reordering Fields

1. The farthest right column displays blue arrows. These control the order of the rows.

To move the field up one position, click the left arrow.

To move the field down one position, click the right arrow.

	Lookup Values	Type	Order	
Edit/Default	Values	lookup	1	⬇
Edit/Default		text	2	⬆ ⬇
Edit/Default		text	3	⬆ ⬇
Edit/Default		text	4	⬆ ⬇
Edit/Default		text	5	⬆ ⬇
Edit/Default	Values	lookup	6	⬆ ⬇
Edit/Default	Values	lookup	7	⬆ ⬇
Edit/Default	Values	lookup	8	⬆ ⬇
Edit/Default		date	9	⬆ ⬇
Edit/Default		date	10	⬆ ⬇

Schedules

This page allows you to create work orders from scheduled maintenance.

Managing Work Order Templates

1. On the left side of the screen under the Schedule tab you will see a list of all the work order templates.

2. In this table you can edit the template and create/edit a schedule for the template.

Template Name	Edit Template	Schedule
Change Water Meter	Edit Template	Create Schedule
Citizen Complaint Pothole	Edit Template	Edit Schedule
Daily Time Sheet	Edit Template	Edit Schedule
Ditch Maintenance	Edit Template	Edit Schedule
Fire Hydrant Replacements	Edit Template	Create Schedule
Gutter Cleaning	Edit Template	Create Schedule
Hydrant Repair	Edit Template	Edit Schedule
Lift Stations	Edit Template	Edit Schedule
Mowing	Edit Template	Edit Schedule

NOTE

A work order template will allow you to input the information for a work order you use frequently. For example, if you are making a Lawn Mowing work order once a week, you can create a template of that work order and have the information saved for future use. This way you don't have to re-enter the same information over and over. Similarly, you can create a schedule of each of these templates to automatically remind you when a work order needs to be made.

Editing a Work Order Template

1. Click Edit Template. A new window will open.

2. In this window you have the option to edit any of the existing information or add an Activity Code, Employee, Equipment, Material, or Inventory to the template. Press Save Template when you are finished.

Template Information		Save Template
Template Name	Change Water Meter	Add/Edit Items in Template:
Department	09: Water Meters	Activity Code
Requestor Name	Jesse Watkins	Employees
Requestor Phone Number	281455645	Equipment
Work Description	Change Meter	Material
Location Description	nasa rd 1	Inventory
Problem Code	09: Water Meter Installation	
Priority Classification	Low	
Status	Closed	
Date Work Begins		
Date Completed	3/5/2013	

Creating and Editing a Schedule

1. Click Create Schedule. A new window will open.

Add Schedule		
Scheduled Day Interval	0	Note: Must be Greater than 0. Required.
Date		Note: The last time this type of maintenance was done. Required.

Add

2. Enter how often you war scheduled maintenance for that specific work order and the date it was last performed. Then press Add.

NOTE

A work order you would like done once a week, such as Lawn Mowing every Friday, should have a Scheduled Day Interval of 7. It will schedule the maintenance off of the last day the maintenance was done. If maintenance has not been previously performed, choose the date you would like the Scheduled Day Interval to start from.

3. To edit or delete the schedule information, click Edit Schedule (Edit Schedule appears once a schedule has been created).

Edit Schedule		
Scheduled Day Interval	21	Note: Must be Greater than 0. Required.
Date	6/10/2013	Note: The last time this type of maintenance was done. Required.

Save Delete

4. Press the Delete button or make any necessary changes and press Save.

Creating Work Orders from Scheduled Templates

1. To the right of the Template list is the scheduled work orders. Here you can see upcoming and past due work orders and create a work order from the scheduled template. In the top right corner, you can choose how far in advance you want to view the scheduled work orders by entering the number of days.

Maintenance Schedule By Date — Due in 7 Days GO

Template Name	Last Date	Next Date	
Hydrant Repair	2/12/2013	3/14/2013	Create WO
Ditch Maintenance	3/20/2013	4/3/2013	Create WO
Mowing	5/20/2013	5/25/2013	Create WO
Potholes	5/29/2013	6/1/2013	Create WO
Lift Stations	5/16/2013	6/15/2013	Create WO
Daily Time Sheet	6/24/2013	6/25/2013	Create WO
Citizen Complaint Pothole	6/10/2013	7/1/2013	Create WO

2. Click Create WO to create a work order for scheduled maintenance. This is will open the Work Order Interface.

NOTE

The scheduled maintenance past due appears in red.

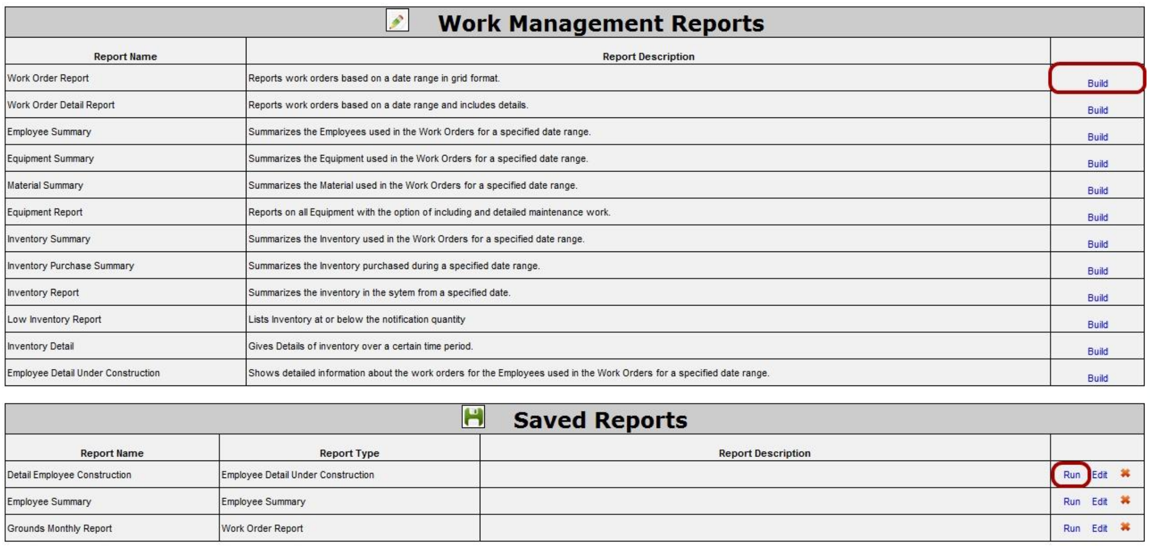
Creating Reports

Reports are used to organize work order data into useful groups that can be printed out and shared. This section will cover how to create and save report criteria for later use, and how to export a report into a Microsoft Excel or PDF file.

Building a Work Order Report

1. In the Reports tab, click Build on the report type of your choice.

2. To run a saved report, click Run on any of your saved reports.



Designing a Work Order Report

3. To choose the report fields you would like to have show in the report, click the '+' next to the field(s) you want.

4. Click Run once you have selected all the desired fields.

Selecting Report Criteria

5. On this screen, you can pick which work orders you want to run the report on. Selecting a date is required, and you have the option to use a saved search to further narrow your results. When you've selected the criteria, click the Run button.

Exporting a Report

5. At the top of the report window, chose either Excel or PDF in the select a format drop down box.

6. When you select a format, the Export button will turn blue, and allow you to click on it.

Explanation of the Report Interface

The Group By button customizes the way the information is organized.

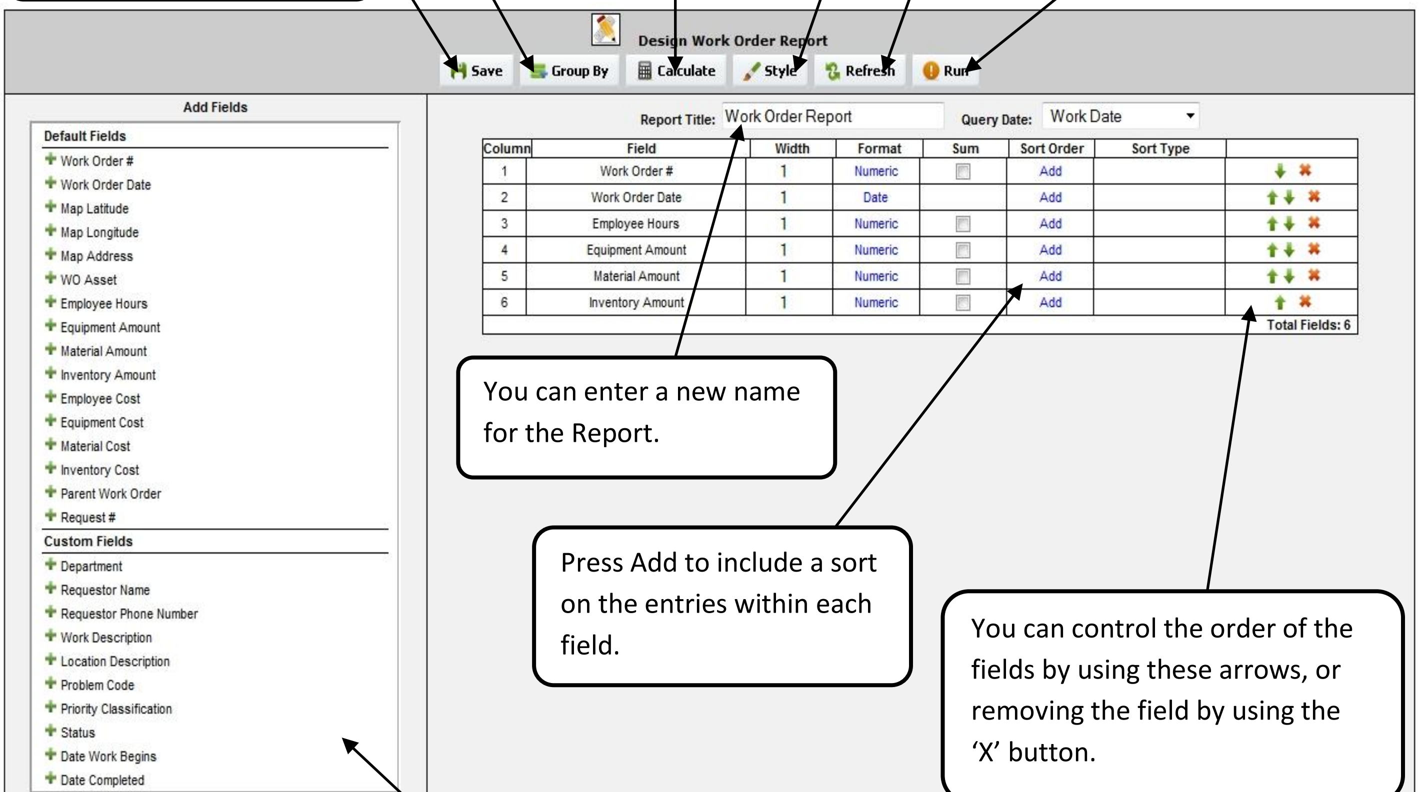
The Style button customizes the color, font, and font size.

The Refresh button refreshes the report, and removes any unsaved changes.

The Save button can be used to save a report template that will be used frequently.

The Calculate button allows calculations to be included.

The Run button opens a window to choose report criteria and then creates the report.



You can enter a new name for the Report.

Press Add to include a sort on the entries within each field.

You can control the order of the fields by using these arrows, or removing the field by using the 'X' button.

These are the different fields you can add to the report.