

FLORIDA

WORK ORDER

CREATED BY ME ASSIGNED TO ME IN MY REGIONS MY CREWS

Select... None Selected Select Clear Select... 7/1/2018 to 7/1/2019 FIND Find Request

Complete... Select... Logbook Reports

WORKING

zAdmin2_380

Complete By: 6/29/2019 11:59 PM

inspection

Complete By: 7/14/2019 11:24 AM

Create Request

The screenshot shows a web form titled 'Create Request'. At the top, there are navigation links: 'Requests', 'Find Request', 'Run Report', 'Workloading', and 'Create Request'. Below these is a 'FIND A CONTACT' button. The form contains several dropdown menus and text input fields. A 'View Procedure' link is visible in the middle. At the bottom, there is a section for 'Who is making this request?' with fields for 'Last Name', 'First Name', 'Company', 'E-mail Address', 'Department', and 'Notify Requestor'. A 'CLEAR CONTACT INFO' button is also present.

(If you are the Requestor - Skip to Step 2)

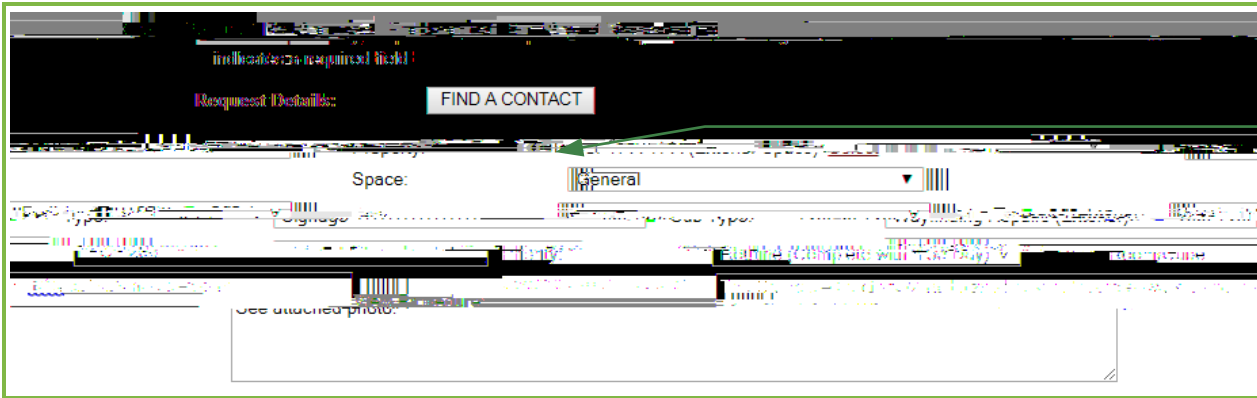
If you will be submitting the request on behalf of another person click FIND A CONTACT in the pop-up box type the name of the requestor and click FIND A list will display click the name to select that user as the requestor.

(See Appendix A-C for a Campus/Building list)

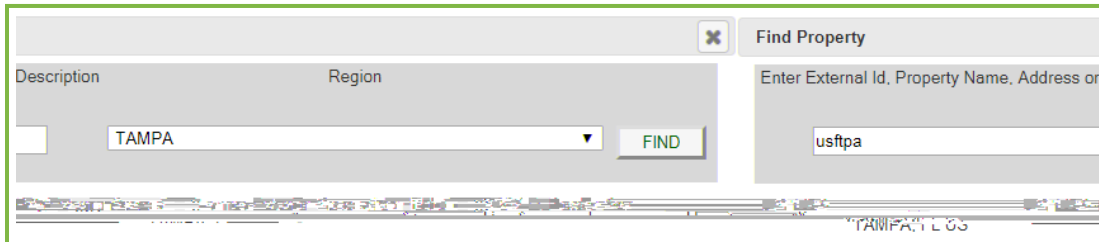
Select the Property (Building or Land Area), Floor (Building Floor Level) & Space (Room) where the issue is located. Clicking Select will display a pop-up box to enter Property, where the issue is located. An External Id (Building Abbreviation), Address or Description can also be used to find and make a selection. Selecting a Region (Campus/Group) will narrow the search to a campus or group.

The screenshot shows a 'Find Property' pop-up window. It has a search bar with the text 'TAMPA' and a 'FIND' button. To the right, there is an 'Enter External Id' field with the text 'fpc'. Below the search bar, there is a list of results, with 'CONSTR BLDG' visible.

Create Request



Select the Property, click Select



A)

Create Request

Create Request

Conference Room: -05 Space: 0108

Please install a SUXXO Whiteboard on the wall in the Conference Room. See attached photo.

Office: John Smith, Email jsmith@usf.edu Accountab

Default Contact CLEAR CONTACT INFO...

Last Name:	<input type="text" value="Test"/>	First Name:	<input type="text" value="USF"/>
E-mail Address:	<input type="text" value="Test.User@usf.edu"/>	Company:	<input type="text" value="University of South Florida"/>
Alt. Phone:	<input type="text" value="813-944-1234"/>	Phone:	<input type="text" value="813-974-2011"/>
Notify Requestor:	<input type="checkbox"/>	Department:	<input type="text" value="379 - UNIVERSITY ADMINISTRATIVE"/> Select Clear

Account Information

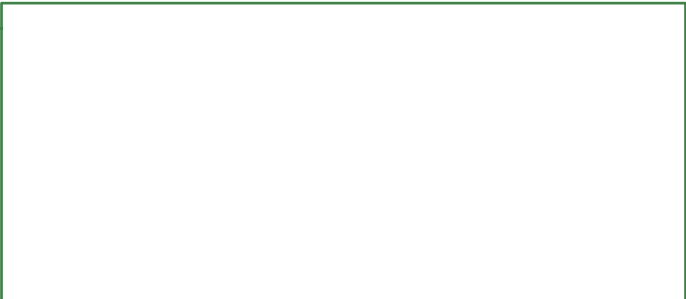
Account:

Schedule For: AM

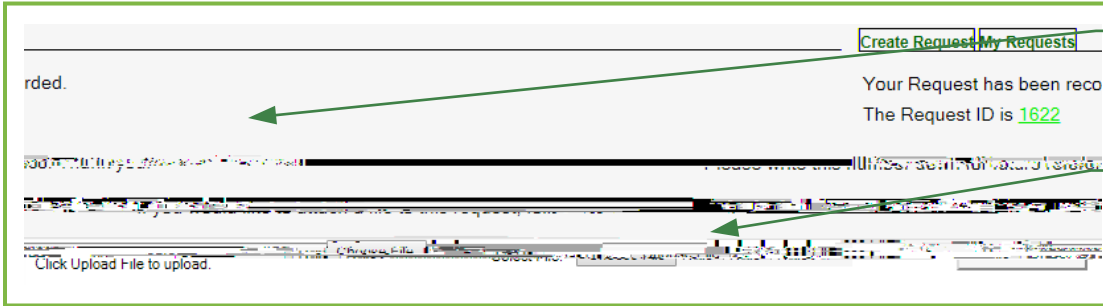
page

ACCOUNTS

RESET



Request Confirmation

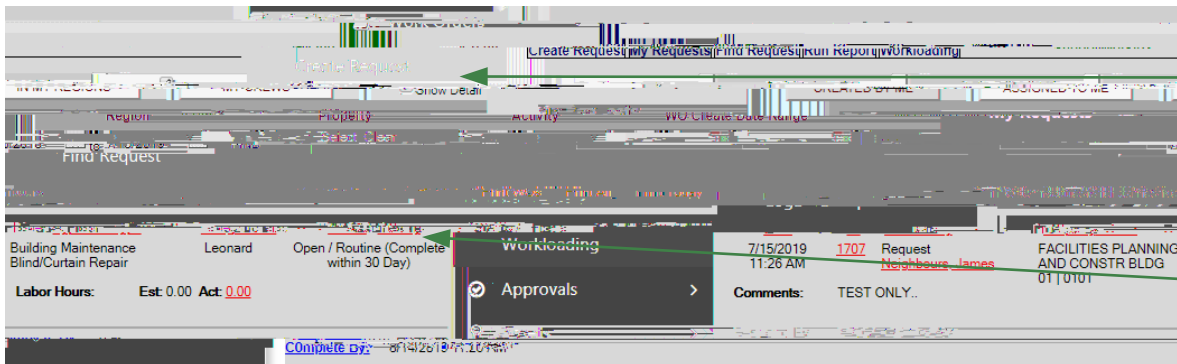


Submitted Request
After the request is submitted, the system will display the request ID as a clickable link. Click the link to view all the details of your request

Adding an attachment to the Work Request
Pick Choose File in the pop-up box, locate and select the file to attach, then pick Open. The file name will be shown. Pick UPLOAD FILE to include a photo/document etc. to the Work Request

Returning to Request

Example



My Requests

Created by Me
The My Request tab provide access to all the requests you submitted. The CREATED BY ME filter will show just the requests you submitted. You can use filters to narrow the selection, the most recent will be at the top of the list

Request Details
Click on the Request ID to see the details and make updates.

REQUEST DETAILS

Requested By: JCF-Test Date: 2018-03-23 09:11:11
Design And Construction Department: 022600 - De

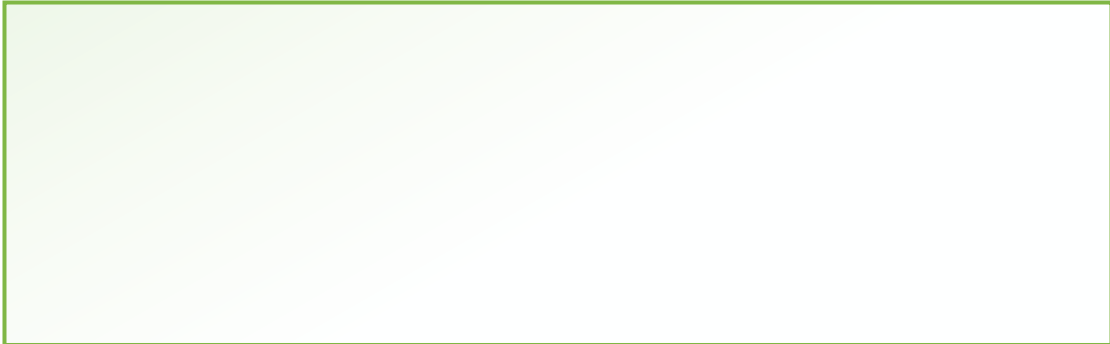
Priority: Routine (Complete within 30 Day) Status: Open
Estimated Amount: \$0.00 Not to Exceed Amt.: \$0.00
Vendor: NA Ext. Cost Center:

REQUEST HISTORY

room, water is coming from ceiling, need addressed ASAP. this is a slip & fall issue, also need clean up from custodial.

Click UPDATE to save: UPDATE





ADD DETAILED ESTIMATE

<input type="text" value="1.00"/>	Estimated Labor
<input type="text"/>	Estimated Materials
<input type="text"/>	Estimated Other Costs
<input type="text" value="1.00"/>	Grand Total

ROLLUP TOTALS SUMMARY

Estimated Labor	\$1.00
Estimated Materials	\$0.00
Estimated Other Costs	\$0.00
Grand Total:	\$1.00

Create Request | My Requests | Find Request | Add Request | Work History

REQUEST DETAILS

NEW APPROVAL REQUEST

APPROVAL RECORDS

No records were found.

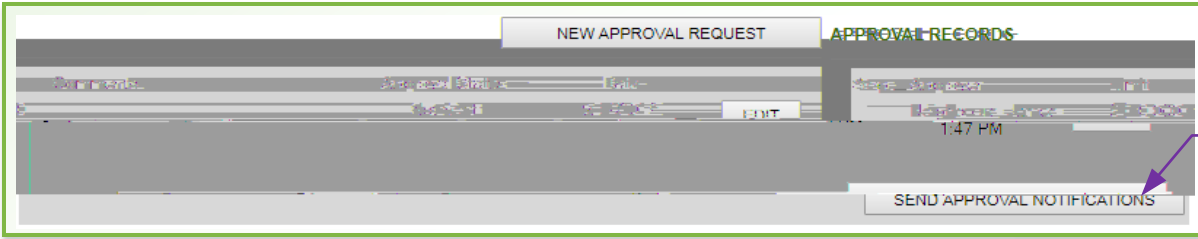
REQUEST HISTORY

10/27/2019 11:50 AM	TECHNICAL: Please install and mount whiteboards on east wall of the waiting area.	Open	10/27/2019 11:50 AM
10/27/2019 11:50 AM	Account: Please install and mount whiteboards on east wall of the waiting area.	Open	10/27/2019 11:50 AM
10/27/2019 11:50 AM	Account: Please install and mount whiteboards on east wall of the waiting area.	Open	10/27/2019 11:50 AM
10/27/2019 11:50 AM	Account: Please install and mount whiteboards on east wall of the waiting area.	Open	10/27/2019 11:50 AM
10/27/2019 11:50 AM	Account: Please install and mount whiteboards on east wall of the waiting area.	Open	10/27/2019 11:50 AM

to \$1.00

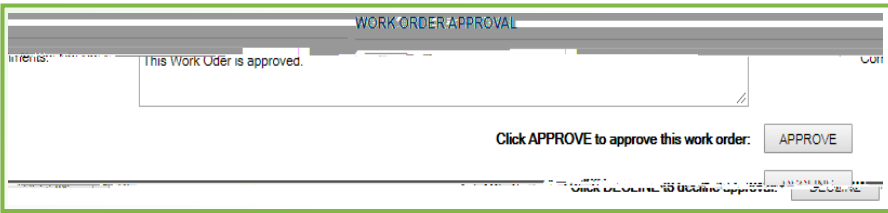
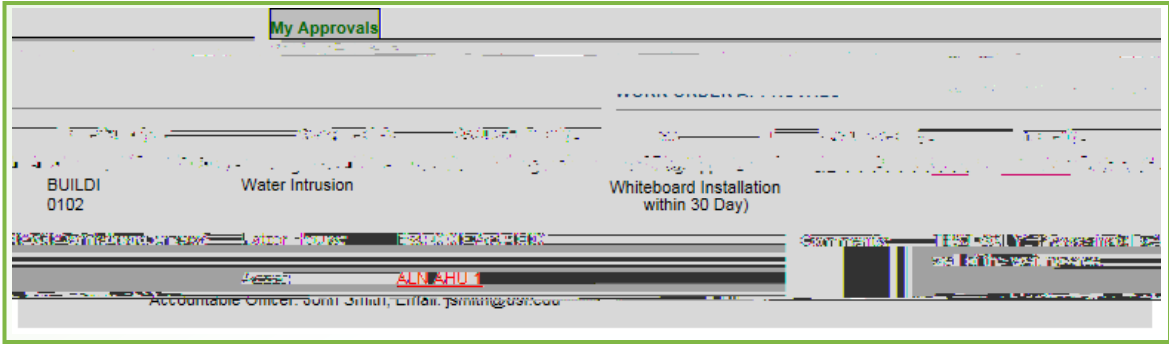
NEW APPROVAL REQUEST

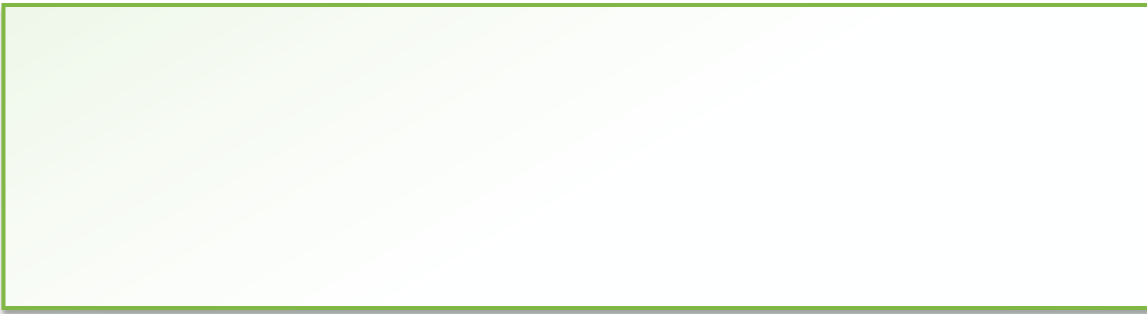
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>



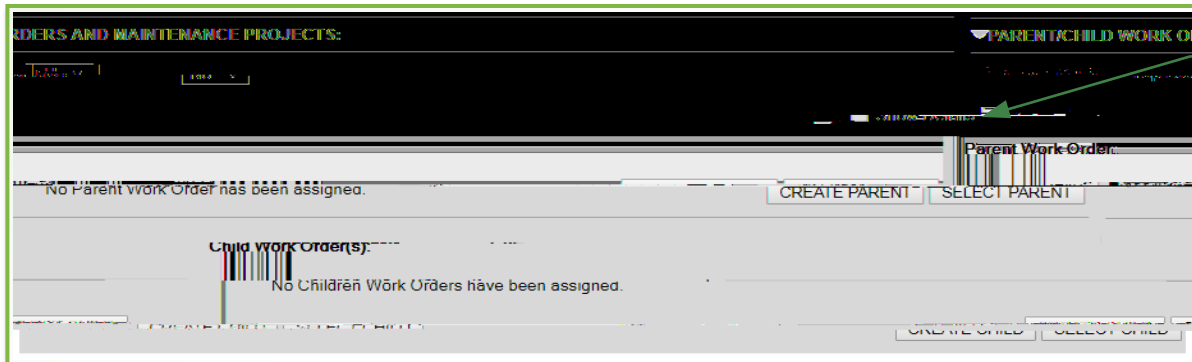
Sending Approvals

Approvals Records
 Click **SEND APPROVAL NOTIFICATIONS** and the approval request to the selected Accountable Officer or Design Approvers receive email notifications with a link, they are directed to view pending, JavaScript, or



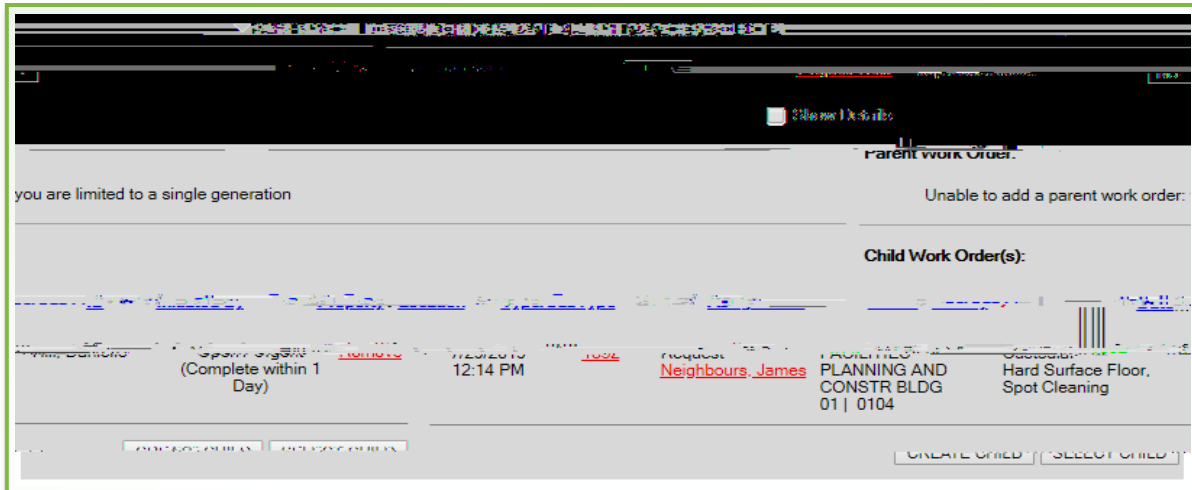


After Submitting
Adding Parent /Child



Parent/ Child Work Order(s)

After a Work Order has been submitted you can create additional Child Work Orders when service will be required from other Crews/Shops. Click CREATE PARENT or CREATE CHILD to create and add additional Work Orders to multiple Crews, this will open the Request Detail page providing the same Property, Floor & Spaces as indicated on the initial request, all that is needed is to select the Type & Subtype for the required service along with a priority, and contact info. Add a detailed description for the request that includes comments indicating the work will support another request. To add the contact, use FIND CONTACT and select the same contact as the initial request. You can also use Default Contact.



LABOR COST SUMMARY (0)

Line	Crew	Employee	Labor Date	Activity Description	Export Date	Hours
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[Add New Labor](#)

[Add New Material](#)

[Add New Other Cost](#)

[View Business Changes](#)

ROLLUP TOTALS SUMMARY

Total Other Costs: \$0.

Work Order Charges Total: \$0.00

Adding Cost to the Work Order
Click the Links Add New Labor Add New Material or Add New Other Cost the section(s) will expand to display the

Adding Material Cost

Quantity: [] Unit Cost: [] Tax Rate(%): [0] Item: [] Select Clear Bin: Select... Description: []

Adding an Item

Click Select to add an item to the Work Order, a dialog box opens allowing you to locate and select the item to add.

Find Material Item

Function Class: [] Part #: [] Description: [] Filter: Part #, Item, Supplier name, Description, or Barcode

tape [] Select... [] Select... [] FIND

Part #	Description	Unit Cost	Qty On Hand	Warehouse
<u>1N956</u>	Barricade Tape, Yellow/Black, 1000ft x 3In	23.48	0 Each	WSF-MTN
<u>4A416</u>	Barricade Tape, Yellow/Black, 1000ft x 3In	23.42	0 Each	WSF-MTN

Adding Other Cost

Item: Contractor Expense Description: Quantity: Unit Cost: Tax Rate(%) Markup: Payee: Vendor: Date: 19/2019 Select Clear ADD CANCEL

Adding an Item/Type

From the item drop-down, select the type of cost you are adding, in the Description field enter a description for the other cost,

Other Cost Summary This section displays any other type of cost incurred when completing the Work Order. These may be rental fees, outsourced contractor services, traveling expenses, estimate billing charge or the cost of material items that are not managed by the Inventory module.

For each item, the following information is displayed:

Line - The line number of the item.

Name - The name of the item.

Date - The date and time when the item was added to the Work Order.

Vendor - The name of the vendor that supplies the item.

Description - A description of the item as stored in the inventory module.

Export Date - The date when this extracted other cost was exported to the general ledger. (Only applies to billable/paying requests)

Quantity - The number of items needed.

Unit Cost - The cost of the item.

Tax - The cost of any tax applied to the item.

S&H - The cost of any shipping and handling charges applied to the item.

Item - The type of cost you are adding.

Markup - Click to add a markup percentage to the item.

Payee - The name of another party that has already received payment.

Company	Address	Description
ASSOCIATED PLUMBING INC	PO BOX 1312 RUSKIN, Florida 33575	
ASSOCIATED PLUMBING INC	7402 N 56TH ST TAMPA, Florida 33617-7709	
BRAVADO PLUMBING LLC	1810 ZIPPERER RD BRADENTON, Florida 34212-9258	

Line	Crew	Employee	Labour Date	Activity Description	Date	Hours	Rate	Amount	Material	Other	Total										
1				for leaks, ran water to test trap.																	
6			8/1/2019	Drain Stopper, Dis-1-1/8" x 1-1/4" W/6.1PK5		1.00		\$11.11	\$1.00	\$0.00	\$12.11										
7			8/1/2019	Special Order Part Plumber's putty		1.00		\$5.00	\$0.45	\$0.00	\$5.45										
<p>OTHER COST SUMMARY (1)</p> <table border="1"> <thead> <tr> <th>Category</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Material</td> <td>\$13.50</td> </tr> <tr> <td>Labor</td> <td>\$150.00</td> </tr> <tr> <td>Other</td> <td>\$0.00</td> </tr> <tr> <td>Total</td> <td>\$163.50</td> </tr> </tbody> </table>												Category	Amount	Material	\$13.50	Labor	\$150.00	Other	\$0.00	Total	\$163.50
Category	Amount																				
Material	\$13.50																				
Labor	\$150.00																				
Other	\$0.00																				
Total	\$163.50																				

Totals Summary

Totals Summary All costs that have been associated with the Work Order are summarized in the Totals Summary section Costs of a specific type are grouped together - Labor Costs, Material Costs, then Other Costs A grand total of all costs is displayed at the bottom of the section. Each time a cost is added to the Work Order, it is added to the appropriate category and the total is updated

Edit and Delete

You can edit/delete an item by clicking either the **Black Pencil** to edit or the **Red Check Mark** to delete that appears on the right as your mouse hovers over the line item dialog box opens asking you to confirm your choice.

Rollup Totals Summary

Viewing Rollup Summary

When using parent/child Work Orders, this section displays a total of the costs from both the Parent and all Child Work Orders Costs of a specific type are grouped together as indicated in the Totals Summary. Each time a cost is added to the Work Order is added to the appropriate category and the total is updated. The following values are displayed:

- Total Labor** - This value reflects the total cost of all labor entries made, including taxes
- Total Materials** - This value reflects the total cost of all material items added including taxes and shipping/handling This value reflects items added directly from the Work Order Financial page as well as any items added to the Work Order through an inventory Item Issue transaction.
- Total Other Costs** This value reflects the total cost of all other cost items added, including taxes and shipping/handling.
- Work Order Charges Total** This value is the sum of the Total Labor Total Materials and Total Other Costs

Item	Description	Amount
1	to install new cleanout.	\$150.00
2	Material	\$13.50
Total	Work Order Charges Total	\$163.50

View Itemized Charges Click the link to examine a detailed list of all of the charges associated with a Work Order and all Child Work Orders in the Parent/Child hierarchy.

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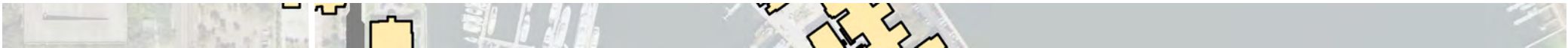
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 EDWARDS DR
 VKA
 VKB
 VKC
 POINCIANNA DR
 VBK
 LANE RD
 DOWNNEY RD
 PARKVIEW DR
 UPPLANDS BLVD

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