

Work Order Guide

8-11-2017

New Work Order
BLH-AR-0251A 21
📄

Work Order #
1028 1

Vendor Name*
 3

Attention*
 12

Back Charge 16

Title*
 2

Vendor #

Items* 4

Due Date	Item	Ph/Act	Amount	Reason Code
Fri, Aug 11, 2017 5	<input type="text" value="Item..."/> 6	Select v ▾	\$ Amount	Select a reason... ▾ 9
Total Amount:			\$ 0 10	

+ 11

Comment 13

Tags 14

Files 15

No files attached

Attach File

17 Create

18 Save as Draft

19 Cancel

20 ↑

1. Work Order (WO) Number, this is always generated within the system. No two WOs will ever have the same number
2. Title will auto generate with Vendor Name and WO #, this can be edited during the creation process
3. Vendor name will prepopulate when created by a vendor, NVR users need to select a vendor who works within your division, if not available please contact your CCM to add them to the Community Vendor Table (CVT)
4. All fields with a red * need to be filled to create a WO, the system will give notification if something is missing
5. Due Date will prepopulate with current date, be sure to update it with the date that the work is to be COMPLETED. Each item can have a different due date.
6. Item is the field that is used to describe the scope of the work, it should not be a full explanation of why the work is needed but what is being done
7. Phase/Activity should be where the amount is going to be billed, Vendors should use the phase/activity that the division has instructed them to use. Available phases are based on the CVT for that vendor, if not available please contact your CCM to add it to the Community Vendor Table (CVT)
8. Amount field cannot be null, a Zero can be placed in this area but it is requested that an amount be entered, even if it ends up being different.
9. Reason Code should be selected based on the reason for the work order item. Please see the Work Order Reason Code guide for examples and definitions.
10. Total Amount would be a sum of all items
11. Green Plus (+) button allows a user to add more items, it is not required to have separate items unless you need to split scope among different phases and reasons.
12. Attention allows the author of the WO to determine who the notification go to, it is based on the vendor selected and DCLU. 1 NVR user and 1 Vendor must be on every WO. Authors of WOs will automatically be added. To add someone, start by typing the @ then their name, a list of names that match will populate the field.
13. Comments will appear on the PDF WO and should be used to provide the reason for the WO, this field does not have a limit on the number of characters that can be entered.
14. Tags allow a user to search WOs based on key works, to add a tag start with a # then type a contiguous string of characters. You can use existing tags or create your own. All tags are visible to ALL users.
15. Files can include pictures and documents, there is no limit to the number of files that can be added. Documents will be printed out in the PDF version of the WO.
16. Back Charge flag is only visible to NVR users; this flag can be added/removed during any stage of the WO. The purpose of the flag is to alert the office staff that the PJM/PM need to code this invoice back to another vendor. Clicking the back charge flag does not notify the responsible party. This should follow normal NVR protocol.
17. Create Button is visible to NVR users; it will notify all users in the attention that a WO has been created
18. Save as Draft allows a user to come back and finish a WO later, drafts are visible to all users but require no action and no notification
19. Cancel deletes the WO, nothing is saved
20. Export button generates a PDF version of the WO; it will include key time stamps depending on the stage of the WO, history and tags are not included.
21. DCLU – this is the lot the WO was generated for, when processed the billing will be coded to this lot.

***Changes to the CVT will take over night to populate within SchedulePro**