



**Training/User  
Manual -  
Work Order  
Masters**

**3.8**



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# Work Order Masters

## Overview

The *Work Order Masters* page in the *Work Order* Functional Area is used to create, delete, schedule, or activate a work order master. The *Work Order Master* page is used to define maintenance jobs and procedures that are routinely completed. An example of this type of work order would be a weekly diesel fire pump test. It is a job which follows the same procedures every time and once scheduled, will be activated by the MMX Scheduling Service based on the scheduled need.

The *Work Order Masters* page is instrumental in the creation of Preventive and any Templated maintenance work orders (these are work orders with no schedule or asset, but can be copied, edited and activated when needed as a PM or as a Demand maintenance work order). When a work order master is activated by a user, it can create a demand maintenance work order that will be listed in the *Active Work Orders* page or a PM based on the activation Icon that is used. When a work order master is activated by the MMX scheduler, it becomes a preventive maintenance work order and will be listed in the *Active Work Orders* page. If there are multiple assets on the Master, it will activate one work order per asset.

**Note:** Work Order numbers are automatically assigned when the work order master is activated or an *Active Work Order* is scheduled manually. The Work Order number will not be displayed in *Work Order Masters*. The Work Order number will be displayed in the *Active Work Orders* page.

The *Record Navigator* displays a listing of the work order masters. When a specific work order master is expanded, a details grid appears on the screen and lists the schedules associated with the work order master. The fields listed in the *Record Navigator* are Job Number, Description, Priority, Work Type, Shift, Cost Center Name, and Maintenance Code. The fields in the *Details Grid* are Schedule Type, Description, Summary, Next Occurrence Date, and Last Occurrence Date.

Job Number	Description	Priority	Work Type	Shift Name	Cost Center Name	Maintenance Code	UserField 1	UserField 2
MO_AHU_MAINT	MONTHLY AIR HANDLING EQUIPMENT MAINTENANCE	SCHEDULED	HVAC	FIRST SHIFT (DAY)	6500-S71141 BUILD-INSPECT/SERV	HVAC		

**Record Navigator (Work Order Masters)**

## Details

The Details Tab consists of basic work order information fields. These fields are Job Number, Description, Cost Center, Priority, Shift, Maintenance Code, and Work Type.

**Note:** Job Number is a required field in order to create a record. All other fields are optional. Job Numbers can be categorized by work type, interval, asset type, or by any other meaningful method of grouping. Examples include:

AH100 – CLN	Weekly cleaning of Air Handling Unit #100
AH100 – INS	Inspection of Air Handling Unit #100
TEST01	Compressor leakdown test

**Note:** Leaving information fields blank will decrease Proteus MMX’s effectiveness in building complete maintenance history records. Make sure all available information has been gathered prior to recording.

The screenshot displays the Proteus MMX software interface for the 'Work Order Master Dialog'. The main window title is 'MO\_AHU\_MAINT'. The 'Details' tab is active, showing the following information:

- Job Number: MO\_AHU\_MAINT
- Description: MONTHLY AIR HANDLING EQUIPMENT MAINTENANCE
- Cost Center: 6500-571141 BUILD-INSPECT/SERV
- Priority: SCHEDULED
- Shift: FIRST SHIFT (DAY)
- Maintenance Code: HVAC
- Work Type: HVAC
- Assigned To: MIKE VASQUEZ

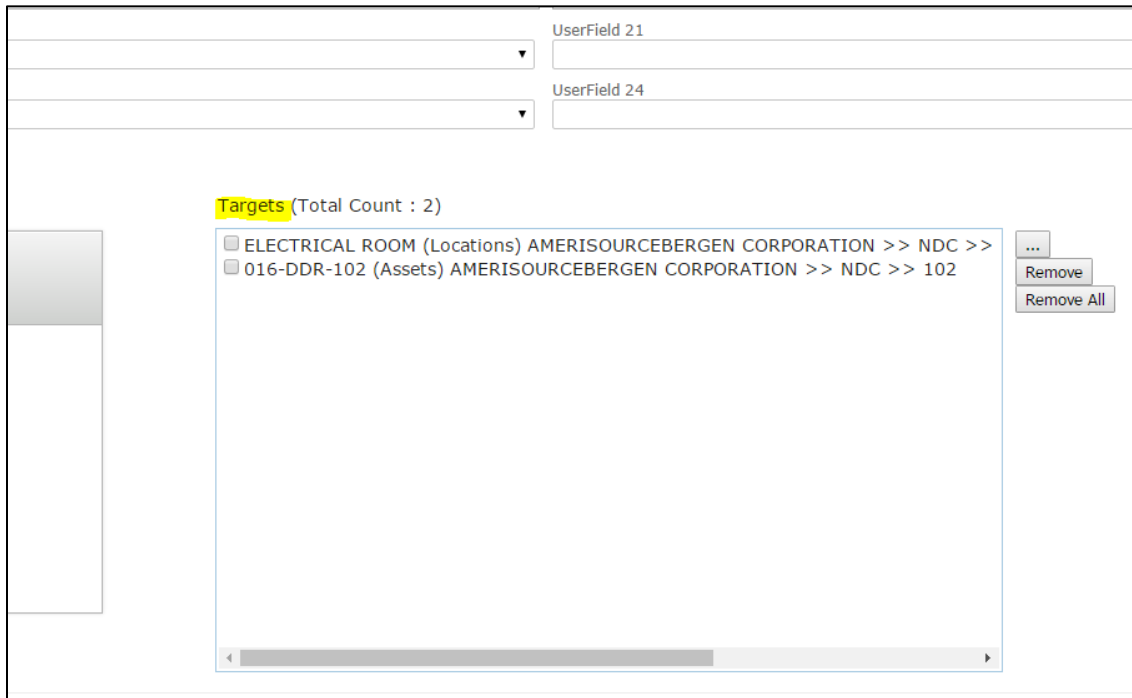
Below these fields are 24 'UserField' input boxes, arranged in two columns of 12. At the bottom, there is a 'Notes' section with a rich text editor and a 'Targets' section showing one target: '016-RTU-RTU-01 (Assets) AMERISOURCEBERGEN CORPORATION >> NDC >> ROOF'.

Details Tab

## Targets

The Targets Section located on the Details Tab is used to attach assets or a location to a Work Order Master. Work Order Masters can also be created for a location by creating an Asset that represents an area (i.e., create an asset record called North Lawn, North Building, or North Entrance).

The Targets Section accesses a list of assets from the Assets page.



**Targets Section**

## Attaching a Target to a Work Order Master

To add Targets to a Work Order Master:

1. Open *Work Order Masters* from the *Work Orders* Functional Area.
2. Under the Details tab, on the Targets section, Select the icon with 3 dots.
3. Select an Asset from the list on the right.



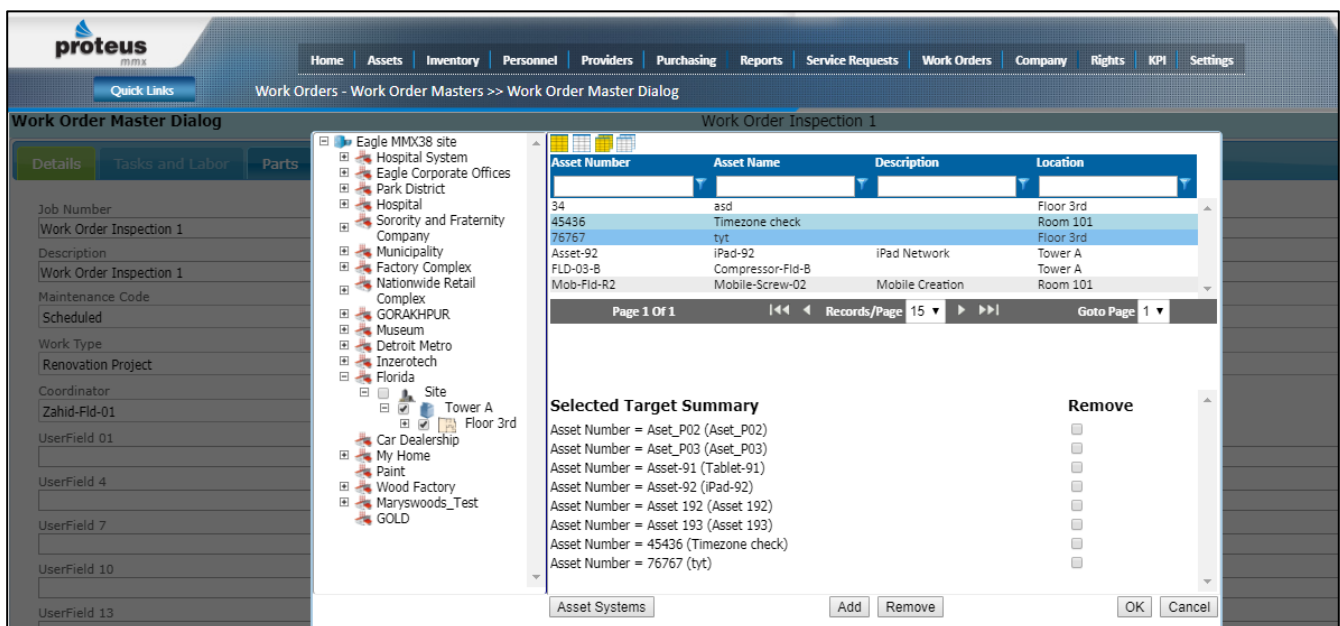
**Work Order – Target**

**Note:** You can also use the navigation tree on the left to find an Asset by location, or select a location as a Target.

4. When you've selected an asset or location, Select the *Add* icon at the bottom of the window.
5. Select *OK*.

To remove Targets from a Work Order Master:

1. On the Targets section, select the checkbox next to the Asset or Location that you wish to remove.
2. Select the *Remove* icon.
3. Select *OK*.



**Asset/Location Tree in Targets Tab**

## Tasks and Labor

The Tasks and Labor Tab is used to attach tasks and labor to a Work Order Master. Tasks are defined in *Tasks* and Labor is defined in *Labor Crafts/Employees*.

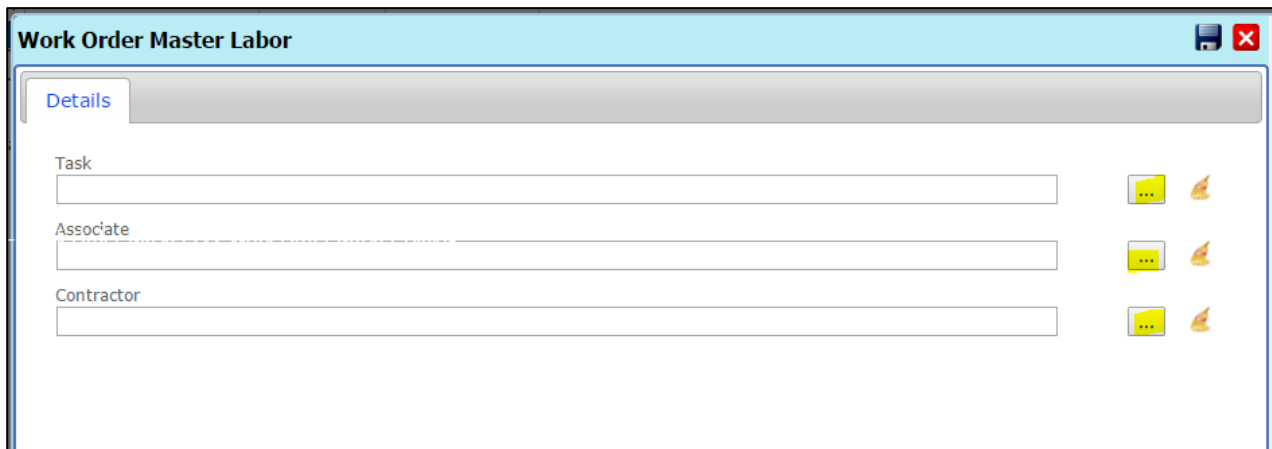
The Tasks and Labor Tab consists of a listing of all tasks/labor assigned to the current work order master. The grid contains various task related fields. These fields are:

Sequence	Task Number	Description	Employee Name
Employee Labor Craft	Contractor Name	Contractor Labor Craft	Estimated Hours

## Attaching Tasks and Labor to a Work Order Master

To add Tasks, Labor and/or Contractors to a Work Order Master:

1. Open *Work Order Masters* from the *Work Orders* Functional Area.
2. Under the Tasks and Labor tab, Select *Add* and select a Task, Employee and/or Contractor from the pop-up.
3. Select Save.



**Tasks and Labor Dialog**

To Remove Tasks from a Work Order Master:

1. Open *Work Order Masters* from the *Work Orders* Functional Area.
2. Under the Tasks and Labor tab, select a Task from the grid and Select the Remove (Red Minus Sign) icon.
3. Select Save.

**Work Order Master Dialog** MO\_AH

Details | **Tasks and Labor** | Parts | Tools | Email | Attachments | Alarms

Sort By: [ ] Sort Order: [ ]

Sequence	Task Number	Description	Estimated Hours	Associate Name	Contractor Name
1	DAI-MPS026GG4DV1CMBV-001-12	1. Tighten all belts, wire connections, and setscrews. 2. Clean the evaporator and condenser coils mechanically or with cold water, if necessary. Usually any fouling is only matted on the entering air face of the coil and can be removed by brushing or vacuuming. 3. Lubricate the motor and fan shaft bearings. 4. Align or replace the belts as required. 5. Clean or replace the filters as required. NOTE: A partially full sight glass is not uncommon at part load conditions. A varying amount of bubbles may be noticeable in the sight glass, which is normal. 6.	8.00	MIKE VASQUEZ	

### Tasks and Labor Tab - Remove

To reorder Tasks on a Work Order Master:

1. Open *Work Order Masters* from the *Work Orders* Functional Area.
2. Under the *Tasks and Labor* tab, select a Task from the grid.
3. Select *Perform Earlier* (Green Arrow Up) or *Perform Later* (Red Arrow Down), depending on your preference.
4. Select *Save*.

**proteus** Home | Assets | Inventory | Associates | Providers | Purchasing | Reports | Service Requests | Work Orders | Company | Rights | Settings

Quick Links | Work Orders - Work Order Masters >> Work Order Master Dialog

**Work Order Master Dialog** MO\_AHU\_MAINT

Details | **Tasks and Labor** | Parts | Tools | Email | Attachments | Alarms

Sort By: [ ] Sort Order: [ ]

Sequence	Task Number	Description	Estimated Hours	Associate Name	Contractor Name
1	DAI-MPS026GG4DV1CMBV-001-12	1. Tighten all belts, wire connections, and setscrews. 2. Clean the evaporator and condenser coils mechanically or with cold water, if necessary. Usually any fouling is only matted on the entering air face of the coil and can be removed by brushing or vacuuming. 3. Lubricate the motor and fan shaft	8.00	MIKE VASQUEZ	

*Note: An orange arrow points to the 'Perform Later' button in the 'Task Number' column of the first row.*

### Tasks and Labor Tab - Reorder





## Tools

The Tools Tab is used to attach a tool or tools to a Work Order Master. Each tool is defined in the Tools page in the Inventory Functional Area.

The Tools Tab consists of a list of all tools from the Tools page. The grid contains various tool related fields. These fields are:

Tool Number  
Tool Name  
Tool Crib Name

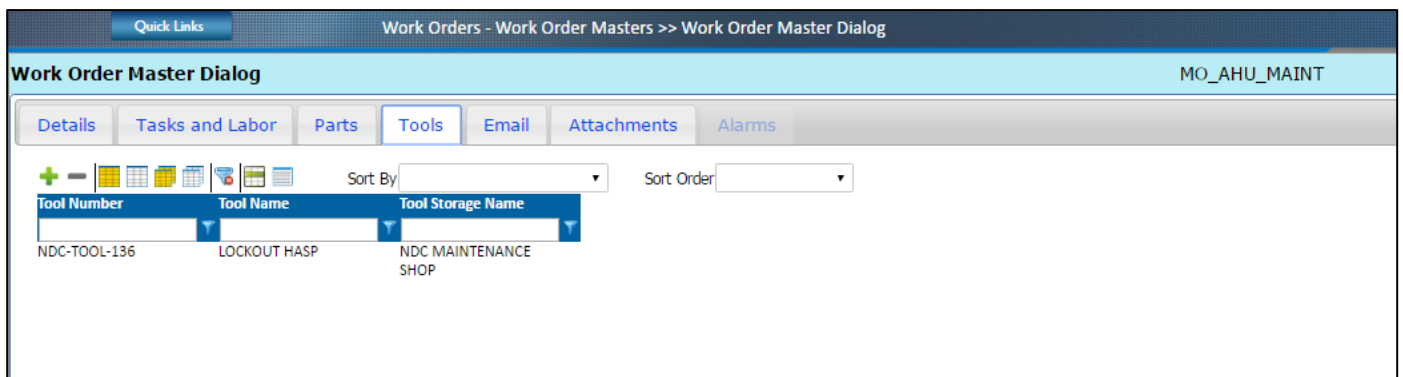
### Attaching a Tool to a Work Order Master

To add Tools to a Work Order Master:

1. Open *Work Order Masters* from the *Work Orders* Functional Area.
2. Under the Tools tab, Select *Add (Green Plus sign)* and select a Tool from the pop-up.
3. Select Save.

To remove Tools from a Work Order Master:

1. Open *Work Order Masters* from the *Work Orders* Functional Area.
2. Under the Tools tab, select a Tool from the grid and Select the *Remove (Red Minus Sign)* icon.
3. Select Save.

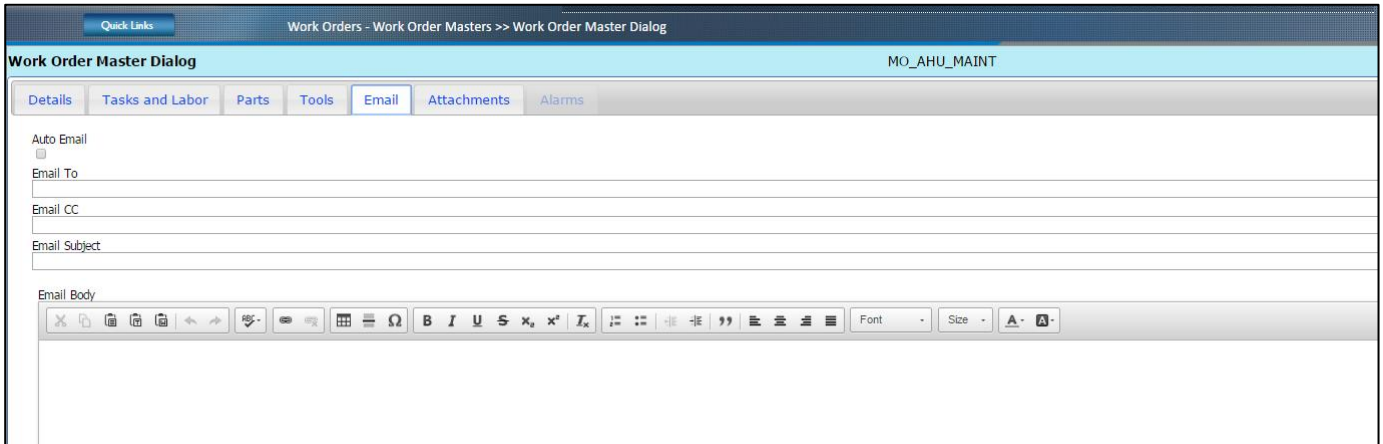


**Tools Tab**

## Email

The Email Tab consists of a form that contains all email related activities for the work order master. If this is filled out, an e-mail will be sent to the recipient upon activation of the Work Order Master.

**Note:** This is not required.





The screenshot shows a software window titled "Work Order Master Dialog" with a sub-header "MO\_AHU\_MAINT". Below the header is a tabbed interface with tabs for "Details", "Tasks and Labor", "Parts", "Tools", "Email", "Attachments", and "Alarms". The "Email" tab is active. It contains a form with fields for "Auto Email" (with a checkbox), "Email To", "Email CC", and "Email Subject". Below these fields is a rich text editor for "Email Body" with a standard toolbar including bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, indent, outdent, link, unlink, font size, and text color options.

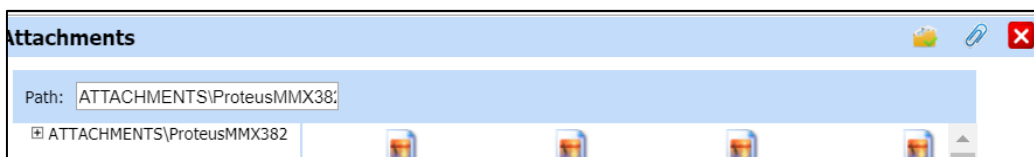
**Email Tab**

## Attachments


Attachments can be added to the work order master record once the work order master is created.

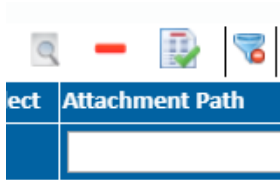
### Attachments

To add an Attachment, on the Attachments tab, select the green + sign    . Find the file you want to attach (just like adding an attachment to an email. If the attachment is in the current attachments folder, you can *Attach* (paperclip) icon in the top left of the window.



If it is not in the current folder, you can select *choose file*, which allows you to search any drive/folder and add a file to the work order attachments. Selecting the file to be attached, and then select the

upload icon.  The attachment will be uploaded to the work order master attachments, and appear in the attachments folder in the future. Any type of file can be attached to a work order master. It can be viewed as long as the person trying to view the attachment has the proper tool to view the file type on their specific device. There is no limit to the number of attachments on a work order master. The



remaining icons on the tab are; view,  D:\Attachments\MM delete, and associate with every work order master. These Icons will only be active if one or more attachments are selected.

## Inspections

Inspections can be selected from Inspections module under work orders.

The screenshot shows the Proteus MMS Work Order Master Dialog interface. The 'Inspections' tab is selected, and the 'Employee Name' is set to 'Zahid-Fid-01 (FLD-01)'. The main content area displays a table of inspection questions for the work order '2S SET TO ORDER'.

Questions	Type
<b>Floors, Aisles, Walls, Ceilings</b>	None
Rack locations are clearly marked and visible	Multiple Choice
Stock storage locations are defined and labeled	Multiple Choice
Empty spaces are kept clear of all items	Multiple Choice
Display board contain up-to-date information	Multiple Choice
All material drop zones are clearly marked and visible	Multiple Choice

## Creating a Work Order Master

To Create a Work Order Master:

1. Open *Work Order Masters* from the *Work Orders* Functional Area.
2. Select the *New* icon.
3. Enter in all data on the *Details* tab.
4. Select *Save*.
5. All remaining tabs/information can be entered at this point.
6. Save your selection.

The screenshot displays the 'Work Order Master Dialog' form in the Proteus software interface. The form is titled 'Work Order Master Dialog' and has a 'Details' tab selected. The form fields are organized as follows:

- Job Number: Text input field.
- Description: Text input field.
- Cost Center: Dropdown menu.
- Shift: Dropdown menu.
- Work Type: Dropdown menu.
- Priority: Dropdown menu.
- Maintenance Code: Dropdown menu.
- Assigned To: Dropdown menu.
- UserField 1 through UserField 24: A grid of 24 text input fields arranged in 8 rows and 3 columns.
- Project: Dropdown menu.

At the bottom of the form, there are two sections:

- Notes: A rich text editor with a toolbar containing icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and text alignment. Below the toolbar are 'Font' and 'Size' dropdown menus.
- Targets: A text input field with 'Remove' and 'Remove All' buttons to its right.

### Work Order Master New

**Note:** A job number and description are required. A target is not initially required, but must be added before work order activation is possible.

## Scheduling a Work Order Master

1. Locate the Work Order Master you just created from the record navigator and select it.
2. Select the + sign on the left of the record.

Job Number	Description	Priority	Work Type	Shift Name
Work Order	Inspection Work Order	Life Safety-Immediate	Planned Maintenance	

Schedule Type	Description	Summary	Next Occurrence Date	Last Occurrence Date	Manual Activation Date
Daily		Every 2 calendar day(s)	04/15/2019	04/11/2019	
Daily		Everycalendar day(s)	04/12/2019	04/11/2019	
Daily		Everycalendar day(s)	04/12/2019	04/11/2019	
Daily		Everycalendar day(s)	04/12/2019	04/11/2019	02/21/2019
Daily		Everycalendar day(s)	06/17/2019	06/14/2019	

### Add Schedule

3. Select the *New* icon.
4. Choose the Cycle Type for the work order (Daily, Weekly, Monthly, And Yearly or Runtime).
5. Enter the *Schedule Initiation Date*. (This date basically “turns on” the work order.)
6. Enter the frequency of the work order. (i.e. Every 3 days, Every 2 weeks, Every 1 year, etc.)
7. Choose on which day the work order should occur (for the Weekly, Monthly, and Yearly schedules).
8. Choose when the work order is *Due* (i.e. how many days it should take to complete.)
9. Select the *Save* icon.

### Schedule Set-Up

**Note:** The Daily schedule has the option of *Schedule On Completion* so that the work order won't generate again until the previous one is completed.

### Activating a Work Order Master

To Activate a Work Order Master:

1. Select a record from the Record Navigator.
2. Select the *Activate (Green Play)* icon.
3. After verification, the Work Order will now be assigned a Work Order Number and shown in the Active Work Orders page.

### Activating Multiple Work Order Masters

To Activate multiple Work Order Masters:

1. Select multiple records from the Record Navigator (by pressing and holding the Ctrl key)
2. Select the *Activate (Green Play)* icon.

	Job Number	Description	Priority	Work Type	Shift Name	Cost Center Nam
+	Work Order	Inspection Work Order	Life Safety-Immediate	Planned Maintenance		Fld-Inventory Co
+	ordercheck	sdgr	Life Safety-Immediate	Pest Control	inzerotech	
+	Oct 22		VERY HIGH - 5 mins	Plumbing		
+	JM-MULTISCHED		LOW - Within 30 days	Drywall	AM	
+	INS-PMMASTER	INSPECTION	MEDIUM- within 2 days	Inspection		

**Work Order Master - Activate**

## **Exercises**

Create new Work Order Master records according to the following information:

1. Every 15 days, an inspection of the building fire system must take place. Schedule this WO to occur every 15 days. If the tasks and equipment do not exist, create them. Add an employee to this job.
2. Create a WO that will occur every month for calibration of the CNC Lathe. This WO must always occur on the fourth Friday of the month and must be performed by a qualified equipment technician.