

CHAPTER 4
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CHAPTER 4

SERVICE AND REPAIR RECORD MANAGEMENT

1. PURPOSE. This chapter contains basic information and instruction about using FleetFocus to manage vehicle maintenance activities. These activities include processing repair, preventative maintenance (PM), and commercial work orders, and making corrections to previously processed work orders.

2. WORK ORDERS.

a. Definition. FleetFocus provides two screens for creating work orders: “Work Order Center” and “Work Order-Short Form.” The purpose of the “Work Order Center” is to record detailed information and requires two steps to process. The purpose of the “Work Order-Short Form” is to quickly record minimal maintenance information in a single transaction. The “Work Order-Short Form” is the primary screen used by California Highway Patrol maintenance personnel and is the focus of this chapter.

b. Repair Work Order. Repair work orders are used to record the tasks, labor, and parts associated with unscheduled maintenance activities resulting from normal wear and tear, damage, and accidents. Use the following instructions to complete a repair “Work Order-Short Form.”

- (1) Click “Data,” “Shop Activity,” and “Work Order-Short Form” from the dropdown menus.
- (2) Click “Prepare for Insert” and select “Basic Info” tab.
- (3) Select “Job Type” (Repair) and enter “Equipment ID.”
- (4) Enter “Meter 1 Reading” (current odometer) and appropriate “Repair Reason ID.”
- (5) Enter appropriate “Work Class” and “Warranty” status.
- (6) Select “Comments” tab and enter appropriate comments.
- (7) Select “Labor” tab and enter appropriate “Task ID” and “Work Accomplished Code.”
- (8) Enter “Employee ID” and enter “Labor Hours” (in tenths of an hour).

- (9) Select "Parts" tab.
- (10) Enter "Task ID" and "Work Accomplished Code."
- (11) Enter "Issuing Location ID," "Part ID," and "Quantity Issued."
- (12) Select "Basic Info" tab.
- (13) Check "Date and Time Closed" box and click "Process."

c. Preventative Maintenance Work Order. Preventative maintenance work orders are used to record the tasks, labor, and parts associated with scheduled maintenance activities. Use the following instructions to complete a PM "Work Order-Short Form."

- (1) Click "Data," "Shop Activity," and "Work Order-Short Form" from the dropdown menus.
- (2) Click "Prepare for Insert" and select "Basic Info" tab.
- (3) Select "Job Type" (PM) and enter "Equipment ID."
- (4) Enter "Meter 1 Reading" (current odometer) and select "No" in the "Warranty Work" field.
- (5) Select "PM Service" (A - Z).
- (6) Enter "Tech/Vendor" (Employee ID).
- (7) Select "Comments" tab and enter appropriate comments.
- (8) Select "Labor" tab and enter appropriate "Task ID" (same as PM Service).
- (9) Enter appropriate "Work Accomplished Code" (13 - Provide Service) and "Employee ID."
- (10) Enter appropriate "Labor Hours" (in tenths of an hour) and select "Parts" tab.
- (11) Enter appropriate "Task ID" (same as PM Service) and enter appropriate "Work Accomplished Code" (13 - Provide Service).
- (12) Enter "Issuing Location ID" and "Part ID."
- (13) Enter "Quantity Issued" and select "Basic Info" tab.

(14) Check “Date and Time Closed” box and click “Process” button.

d. Commercial Work Orders. Commercial work orders are used to record the tasks, labor, and parts associated with maintenance activities performed by commercial vendors. Use the following instructions to complete a commercial “Work Order-Short Form.”

(1) Click “Data,” “Shop Activity,” and “Work Order-Short Form” from the dropdown menus.

(2) Click “Prepare for Insert” button and select “Basic Info” tab.

(3) Select “Job Type” (Repair) and enter “Equipment ID.”

(4) Enter “Meter 1 Reading” (current odometer) and “Tech/Vendor ID” (Vendor ID).

(5) Enter “Repair Reason ID” and “Work Class.”

(6) Select appropriate “Warranty Work Status.”

(7) Select “Comments” tab and enter appropriate comments.

(8) Select “Commercial” tab and enter “Task ID” and “Work Accomplish Code.”

(9) Enter total “Labor Cost” and total “Parts Cost.”

(10) Enter “Vendor Invoice” number and “Vendor Work Order” number.

(11) Click “Process.”

e. Work Order Corrections. The following screen is used to correct previously entered work orders. Use the following instructions to process a work order correction.

(1) Click “Data,” “Shop Activity,” and “Work Order-Short Form” from the dropdown menus.

(2) Click “Filter” button and enter appropriate filter/search criteria.

(3) Click “Get Data.”

(4) Select appropriate “Work Order” and click “Unlock” (Prepare for Update).

- (5) Select "Basic Info" tab and un-check "Date and Time Closed" or "Date and Time Finished" box.
- (6) Click "Process."
- (7) Click "Unlock" (Prepare for Update).
- (8) Select appropriate tab(s) to correct.
- (9) Enter another row to correct the incorrect entry, except, check the "Reversal", "Delete" or "Return" box in order to cancel the original incorrect entry.
- (10) Enter correct data and select "Basic Info" tab.
- (11) Check "Date and Time Closed" box and click "Process."