Work Management

Quick Start Guide

Welcome to Permit 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 screen shots.

For additional help or questions, please call technical support at **888.655.1259.**

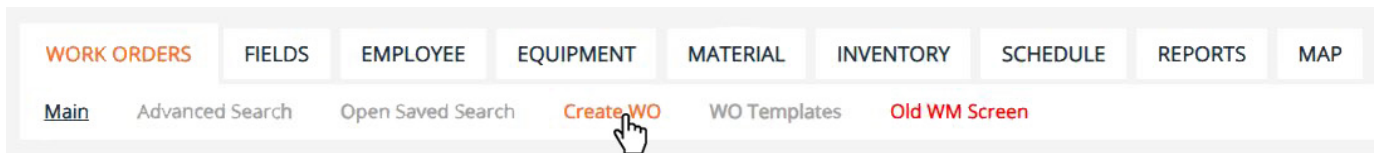> **Technical support and training are always free!**

Table of Contents

Creating/Managing Work Orders

Adding a New Work Order

WORK ORDERS	FIELDS	EMPLOYEE	EQUIPMENT	MATERIAL	INVENTORY	SCHEDULE	REPORTS	MAP

Main   Advanced Search   Open Saved Search   Create WO   WO Templates   Old WM Screen

1 - In the dashboard click on 'Create WO"

CREATE WORK ORDER

🖫 CREATE

Work Order Date:	08/30/18
Department:	▾
Category:	-- ▾
Work Description:	
Location Description:	
Date Completed:	
Requestor Name:	
Requestor Phone Number:	
Project :	-- ▾
Estimated Completion Date:	
Priority Classification:	▾
Problem Code:	-- ▾
Date Work Begins:	
District:	-- ▾
Status:	▾

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

3 - Click the create button at the top-right of the screen.

> **Once the case is created you can email, add notes, upload files, etc.**

> **To add additional fields or items to the drop down menus, see page 5.**

2

Modifying an Existing Work Order

Opening an Existing Work Order

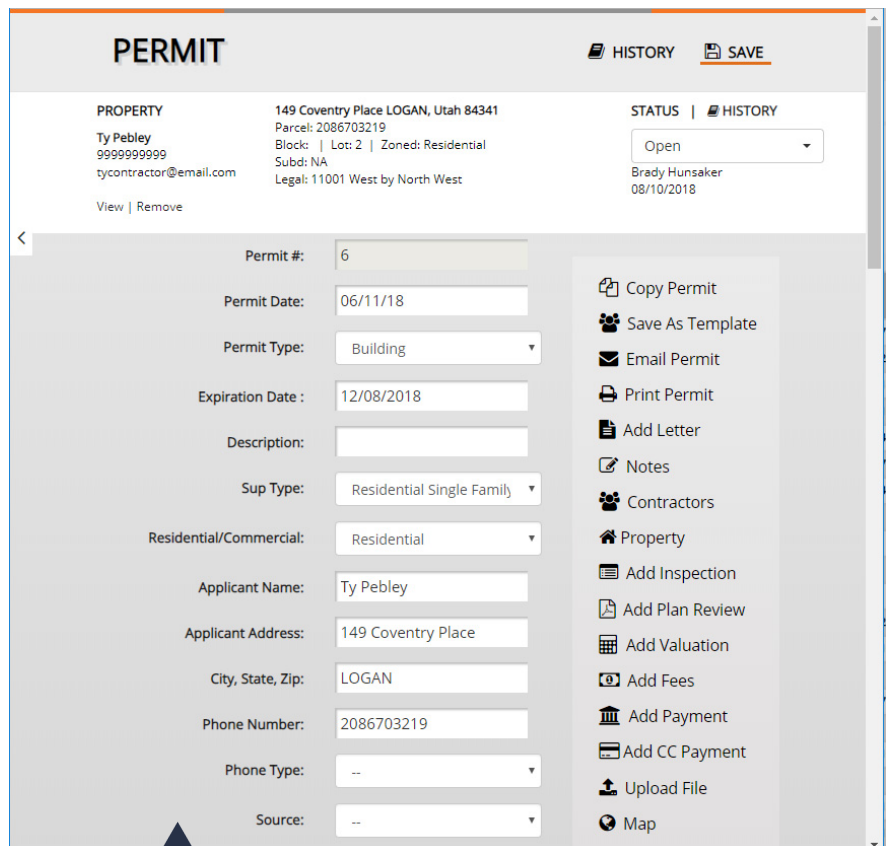| ame	Applicant Address	City, State, Zip	Issued Date	Phone Number	Edit/View
	7777 Ball Park Way	Boston	06/19/2018	2223334444	✏️
	200 Main Street	Logan	07/17/2018	2223334444	✏️

1 - Click anywhere in the row of the work order you want to view, or click on the pencil icon of whichever work order you want to modify.

> **If the work order you are looking for is not displayed, see the section on searching for work orders and data on page 13.**

Modifying Work Order Data

2 - The work order information window will display the work order and all the information attached to it. You can update any of the fields as well as attach equipment, inventory, files and more. When you are finished click the save button in the top-right of the window.

See the screen shot on page 4 for an explanation of all the buttons on the work order interface.

PERMIT

🗐 HISTORY   💾 SAVE

PROPERTY
Ty Pebley
9999999999
tycontractor@email.com

View | Remove

149 Coventry Place LOGAN, Utah 84341
Parcel: 2086703219
Block: | Lot: 2 | Zoned: Residential
Subd: NA
Legal: 11001 West by North West

STATUS | 🗐 HISTORY

Open ▼

Brady Hunsaker
08/10/2018

Field	Value
Permit #:	6
Permit Date:	06/11/18
Permit Type:	Building ▼
Expiration Date :	12/08/2018
Description:	
Sup Type:	Residential Single Family ▼
Residential/Commercial:	Residential ▼
Applicant Name:	Ty Pebley
Applicant Address:	149 Coventry Place
City, State, Zip:	LOGAN
Phone Number:	2086703219
Phone Type:	-- ▼
Source:	-- ▼

📲 Copy Permit
👥 Save As Template
✉️ Email Permit
🖨️ Print Permit
📄 Add Letter
📝 Notes
👥 Contractors
🏠 Property
🖼️ Add Inspection
📄 Add Plan Review
▦ Add Valuation
🔘 Add Fees
🏛️ Add Payment
💳 Add CC Payment
⬆️ Upload File
🌐 Map

3

The Work Order Interface

Opens the quick find menu for the work order.

Creates a copy of the work order, assigns it a new number, and immediately displays the new work order.

Saves your changes. It must be clicked or no changes will be made.

Takes the entered information and saves it for use as a template. It can be accessed from the dashboard.

Emails the work order to employees or contractors.

Prints any recorded data.

Opens a window to add a letter.

Adds detailed notes.

Opens a window to add a purchase order.

Searches employees to add.

Choose what equipment to add to the work order.

Choose what materials to add.

Choose what inventory to add.

Opens a window to assign an asset.

Opens a window to upload files or pictures.

Opens up the map.

WORK ORDER

📖 HISTORY   💾 SAVE

Work Order #: 7100

Work Order Date:

Estimated Completion Date:

Work Description:

Department: --

Category: --

Project : --

Date Work Begins:

Location Description:

Date Completed:

Requestor Name:

Requestor Phone Number:

Priority Classification: --

Problem Code: --

District: --

📋 Copy Work Order
👥 Save As Template
✉ Email Work Order
🖶 Print Work Order
📄 Create Form
✏ Notes
💲 Purchase Order
👥 Employees
🚚 Equipment
🐝 Material
⚙ Inventory
🏷 Assign Asset(s)
⬆ Upload File
🌐 Map

Your pop-up blocker must allow pop-ups from iWorQ or many of these buttons won't work.

4

Using the Advanced Search
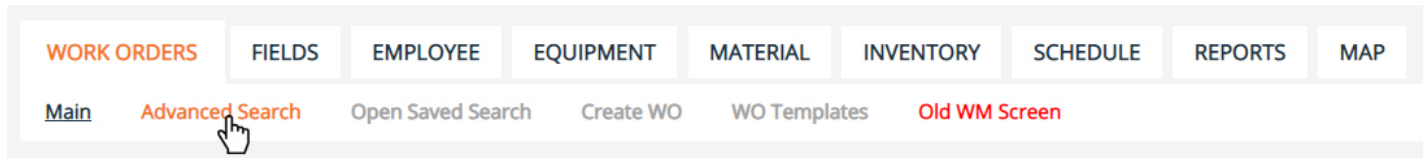
1 - Click on advanced search in the sub menu.

2 - You can search by any of your fields. Click the search button when you're finished entering your search parameters.

3 - If you plan on running a search multiple times, you can save the search parameters by clicking save search at the top of the window.

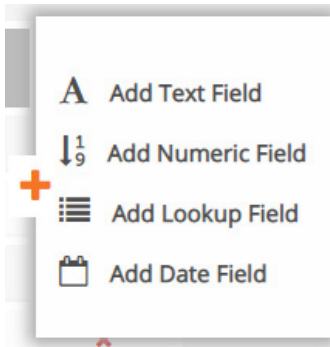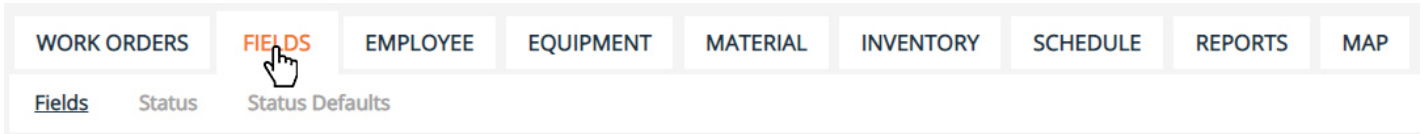Saved searches will allow you to run reports on certain work orders. For example, if you want to run a report on only the 'street maintenance', you can create a saved search and use it when creating a report. For more information on reports see page 15.

Customizing Data Fields

Adding Fields

WORK ORDERS	FIELDS	EMPLOYEE	EQUIPMENT	MATERIAL	INVENTORY	SCHEDULE	REPORTS	MAP

Fields   Status   Status Defaults

A Add Text Field

↓¹₉ Add Numeric Field

☰ Add Lookup Field

📅 Add Date Field

1 - Click on the Fields tab.

2 - On the right-hand side of the screen, there are 4 options to add a new field. Click on the button that corresponds with the field you would like to add.

Numeric Field
Accepts numbers & decimals

Add Numeric Field ✖

Field Name: [ ]

Decimals: [0]

Default Value: [0]

ADD FIELD

Text Field
Accepts text, symbols & numbers

Add Text Field ✖

Field Name: [ ]

Default Value: [ ]

ADD FIELD

Date Field
Accepts numbers formatted as dates

Add Date Field ✖

Field Name: [ ]

Default Days From Creation Date: [ ]

ADD FIELD

Lookup Field
Creates a drop down box

Add Lookup Field ✖

Field Name: [ ]

ADD FIELD

Adding Values to a Lookup Field
The drop down will appear blank until values have been added.

Phone Type	Values	lookup	10	✖
Source	Values	lookup	11	✖

Lookup Values ✖

+ Add Value

Edit	Cell	✖
Edit	Home	✖
Edit	Primary	✖
Edit	Work	✖

1 - Click the values button and a new window will open.

2 - Click add value, type a value then click add.

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Deleting Fields

1 - Click on the red X on the right-hand side of the page. Then click Yes to confirm.

Phone Type	Values	lookup	10	✖
Source	Values	lookup	11	✖

9 ✖

Delete Record?

✔ Yes ✖ No

✖

11 ✖

Reordering Fields

1 - To reorder the field position, click and drag the field that you would like to move. Let go of the field when it is in the spot you would like it in.

| Edit/View	Field ID	Field Name	Lookup Values	Type	Order	
✎	147787	Estimated Completion Date		date	1	✖
✎	84321	Work Description		text	2	✖
✎	152694	Category	Values	lookup	4	✖
✎	72485	Department	Values	lookup	3	✖
✎	109608	Project	Values	lookup	5	✖
✎	98011	Date Work Begins		date	6	✖
✎	86434	Location Description		text	7	✖
✎	96507	Date Completed		date	8	✖
✎	88327	Requestor Name		text	9	✖
✎	90075	Requestor Phone Number		text	10	✖
✎	77173	Priority Classification	Values	lookup	11	✖

7
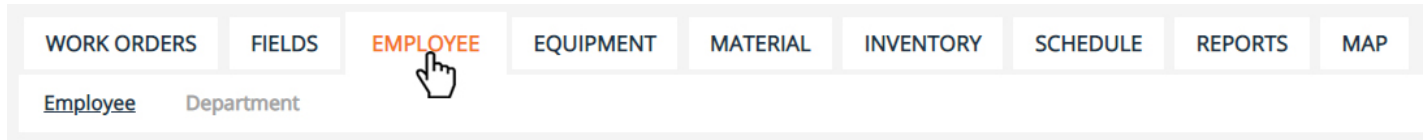
Employees

Adding an Employee

1 - Click on the add employee button from the side menu.
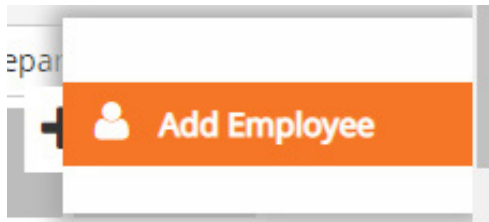
2 - Fill in the employee information and click add employee.

Add Employee

Employee Name	New Employee
Email	
Department	Full-Time
Employee #	
Rate	0.00
Active:	Active

ADD EMPLOYEE

An employee must have an email entered to appear in a check list when you use the email work order option.

Adding a Department
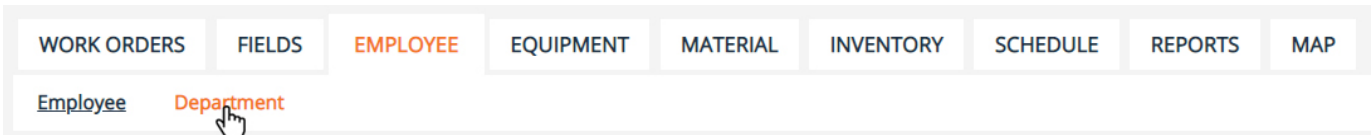
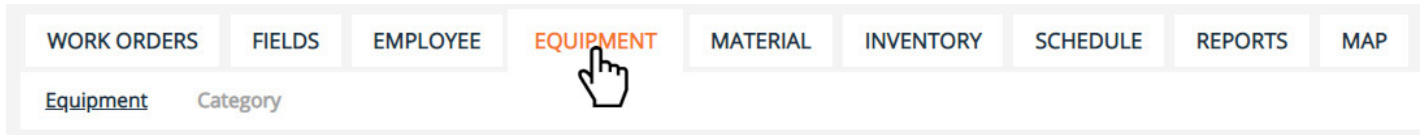**1** - Click on the department button from the sub menu.

2 - Click on add department, enter a name and decide if it should be added to this application only or all applications. Click add.

Departments

+Add Department

✏	🌐	✏	001 GEN ENG - DRAINAGE	✗
✏	🌐	✏	002 GEN ENG - WATER DIST	✗
✏	🌐	✏	003 GEN ENG - WATER TREAT	✗
✏	🌐	✏	004 GEN ENG - SEWER	✗
✏	🌐	✏	005 GEN ENG - AIRPORT	✗
✏	🌐	✏	006 GEN ENG - STREETS	✗
✏	🌐	✏	007 GEN ENG - SOLID WASTE	✗
	🌐	✏	008 GEN ENG - PARKS & REC	✗

Departments

Department Name	
Type	This application only

CANCEL   **ADD**

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Equipment

Adding/Editing Equipment

1 - Click on the add equipment button from the side menu.
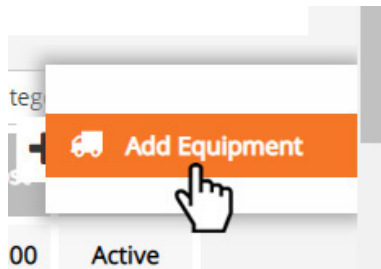
2 - Fill in the equipment information and click add equipment.

3 - To edit a piece of equipment, click on it from the dashboard, enter the updated information and click save.

Add Equipment

Equipment Name	New Equipment
Description	
Category	COA
Make	
Model	
Serial #	
Purchase Price	0.00
Units	each
Unit Cost	0.00
Active:	Active
% Link To:	Work Management

ADD EQUIPMENT

Adding an Equipment Category

1 - Click on the category button from the sub menu.

2 - Click on add category, then enter the new category name and choose if it will apply to this application only, or all applications. Click add to create the new category.
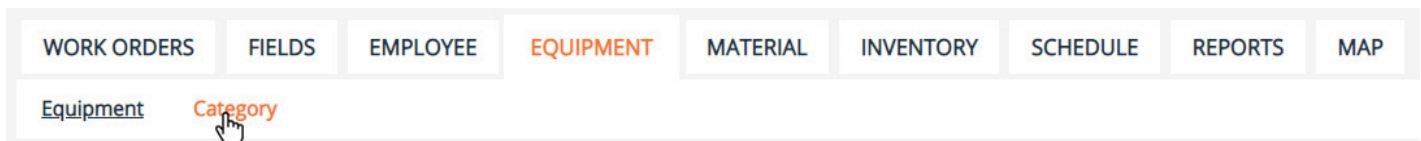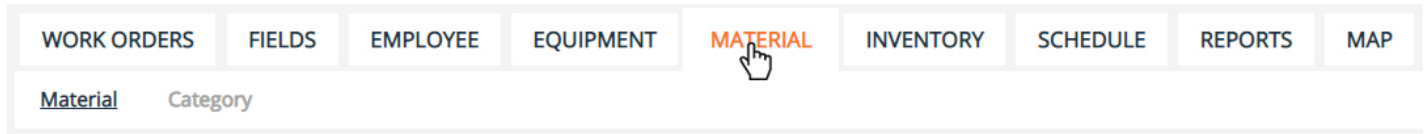
Categories

+ Add Category

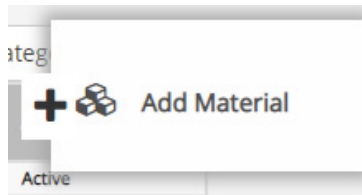|			
✎	◉	COA	✖
✎	◉	Dozer	✖
✎	◉	Fire Department	✖
✎	◉	Flying Automobiles	✖
✎	◉	General	✖
✎	◉	General equipment	✖
✎	◉	Grader	✖
✎	◉	Highway	✖
✎	◉	Lease Equipment	✖
✎	◉	Parks	✖
✎	◉	pickup	✖
✎	◉	Police Department	✖
✎	◉	Public Works	✖

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Material

Adding Material

1 - Click on the add material button from the side menu.

2 - Fill in the material details and click add.

Add Material

Material Name	New Material
Category	Streets & Sidewalks
Units	each
Unit Cost	0.00
Active:	Active
% Link To:	Work Management

ADD MATERIAL

➕ 📦 Add Material

Active

Adding Material Category
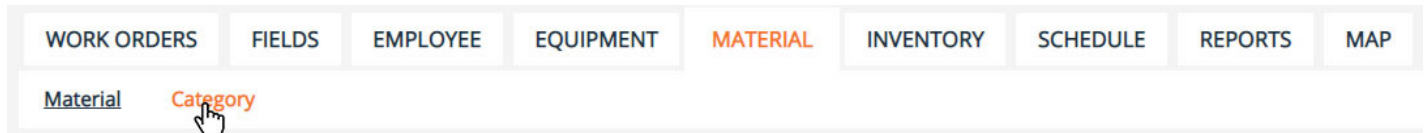
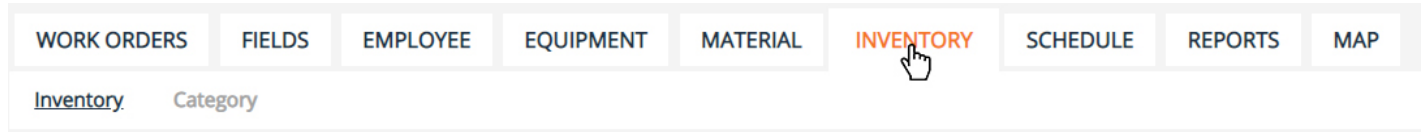**1** - Click on the category button from the sub menu.

2 - Click on the add category button from the window that pops up.

3 - Enter a category name and choose if it will apply to this application only, or all applications. Click add to create the new category.

Categories

+ Add Category

✏️	🌐	Beautification
✏️	🌐	Concrete Construction
✏️	🌐	Drainage
✏️	🌐	Facilities
✏️	🌐	Farm
✏️	🌐	Garbage
✏️	🌐	General
✏️	🌐	General Material
✏️	🌐	Miscellaneous
✏️	🌐	Money Trees
✏️	🌐	Mosquito Control
✏️	🌐	Office of Director
✏️	🌐	Other

Add Category

Category Name	
Type	This application only

ADD   **CANCEL**

10

Inventory

Inventory   Category

Adding Inventory

1 - Click on the add inventory button from the side menu.

2 - Fill in the inventory details and click add inventory.

Add Inventory

Inventory Name	New Inventory
Inventory Number	
Category	Batteries
Description	
Vendor	
Location	
Purchase Order	
Purchase Date	10/16/2018
Quantity	1
Units	Each
Cost/Unit	0
Notification Quantity	0
Active:	Active

ADD INVENTORY

Adding Inventory Category

Inventory   Category

1 - Click on category in the sub menu.

2 - Click on add category from the window that pops up.

3 - Enter a category name and choose if it will apply to this application only, or all applications. Click add to create the new category.
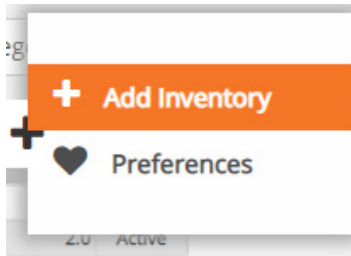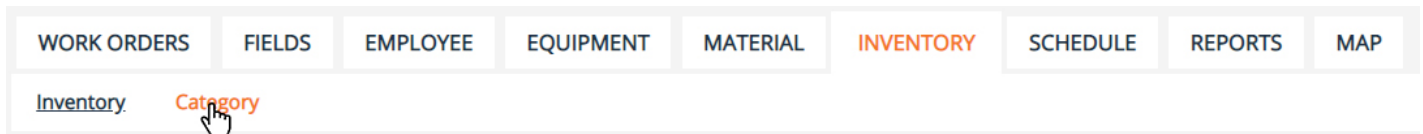
Add Category

Category Name	
Type	This application only

ADD | CANCEL

Categories

+ Add Category

✏	🌐	Batteries	✕
✏	🌐	calculator	✕
✏	🌐	Custodial Supplies	✕
✏	🌐	Dirt	✕
✏	🌐	Downtown Dev	✕
✏	🌐	Drainage	✕
✏	🌐	flying parts	✕
✏	🌐	Fuel	✕
✏	🌐	Garage	✕
✏	🌐	Garbage Cans	✕
✏	🌐	General	✕
✏	🌐	General inventory	✕
✏	🌐	Guitars	✕

View History/Add Purchase

Edit			Inventory Name	Inventory Number	Categor
✏	💲	📕	#67 Limestone 21	578940	General inventory

HISTORY   💲 ADD PURCHASE   ✏ ADD USAGE

Purchases

Date	PO #	Quantity	Cost/Unit	Total	
05/06/09		525.0	2.86	1,501.50	Edit
05/04/16	123456	100.0	3.00	300.00	Edit
05/31/18	12565	5.0	30.00	150.00	Edit

Total Purchased: 630.0

Work Order Usage

Date	Quantity	WO #	
01/01/00 12:00:00	1.0	5392	Open
03/14/12 12:00:00	15.0	2451	Open
03/21/12 12:00:00	5.0	2453	Open
10/02/12 12:00:00	1.0	2627	Open
12/14/12 12:00:00	1.0	2705	Open
02/12/13 12:00:00	56.0	2729	Open

1 - Click on the book icon next to the corresponding inventory item.

2 - From the window that pops up, you can view previous purchases and work orders where the inventory item has been used.

3 - Use the buttons at the top of the window to add purchases of the inventory or document inventory usage.

Purchases can also be added from the dashboard by clicking on the dollar bill icon next to an inventory item.

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Schedule

Managing Work Order Templates

1 - On the left side of the screen you will see any existing templates.

2 - There are options to edit the template or create/edit a schedule for the template.

Existing Templates		
Template Name	**Edit Template**	**Schedule**
Demo Test 921	Edit Template	Create Schedule
Ditch Maintenance	Edit Template	Schedule
Facilities	Edit Template	Schedule
Fire Hydrant Replacements	Edit Template	Schedule
	Edit	

> 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. 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 on 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 Employee, Equipment, Material or Inventory to the template. Press the save button when you're finished editing.

DITCH MAINTENANCE   💾 SAVE

Template Name:	Ditch Maintenance
Estimated Completion Date:	
Work Description:	888-888-7777
Department:	Facilities
Category:	--
Project :	Road Project 2018
Date Work Begins:	12/25/2015
Location Description:	Cut / clean ditch for adequate runoff
Date Completed:	
Requestor Name:	
Requestor Phone Number:	10:00 am
Priority Classification:	--
Problem Code:	01: Vehicle Operation Ch

👥 Employees
🚜 Equipment
🛠 Material
⚙ Inventory

13

Creating and Editing a Schedule

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

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

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

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

Add Schedule	✕
Scheduled Day Interval	15
	Note: Must be Greater than 0. Required.
Date	10/17/2018
	Note: The last time this type of maintenance was done. Required.
	ADD

A work order you would like done once a week, should have a scheduled day interval of 7. If the maintenance has not been previously performed, choose the date you would like your interval to start from.

Creating and Editing a Schedule

Upcoming Work Orders			Due Before 11/07/2018
Template Name	**Last Date**	**Next Date**	
General Ins./Main. For Asset - Mike	08/15/18	08/15/18	Create WO
Road Work Maintenance	04/16/18	09/13/18	Create WO
Multiple Problem Code Work Order	08/30/18	09/13/18	Create WO
Gutter Cleaning	09/07/18	09/17/18	Create WO

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 form the scheduled template. In the right top corner, you can enter a date to view the work orders due before that date.

2 - Click Create WO to create a work order for scheduled maintenance. This will open up the work order interface.

Creating Reports

Building a Report

WORK ORDERS	FIELDS	EMPLOYEE	EQUIPMENT	MATERIAL	INVENTORY	SCHEDULE	REPORTS	MAP
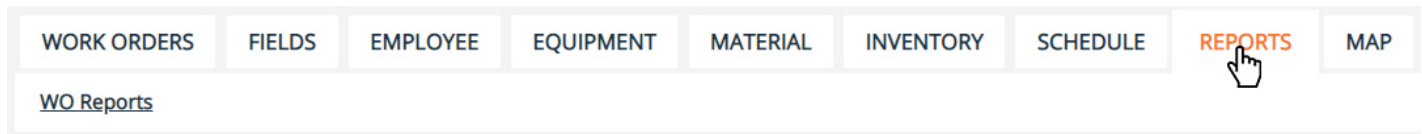
WO Reports

1 - Click on the reports tab in the menu.

Work Order Reports		
Report Name	**Report Description**	
Work Order Report	Reports work orders based on a date range in grid format.	Build
Work Order Detail Report	Reports work orders based on a date range and includes details.	Build
Employee Summary	Summarizes the Employees used in the Work Orders for a specified date range.	Build
Equipment Summary	Summarizes the Equipment used in the Work Orders for a specified date range.	Build

2 - Choose from the options which report you would like to run. Click the build button that corresponds with the correct report.

3 - Pick the from the fields which data you would like displayed in your report. You can control the order of the fields by clicking the up or down arrows. When you're finished, click the run button.

4 - Choose the date range for the report. You have the option to use a saved search to further narrow your results. When you've selected the criteria, click run to view or print the report, cancel to go back, or export as .csv to download the data in a spreadsheet.

Please contact iWorQ at 888.655.1259 for any questions on running reports.

15

Using the Map

Map Dashboard

Select the color to display search results

Choose from saved searches to display specific parcels

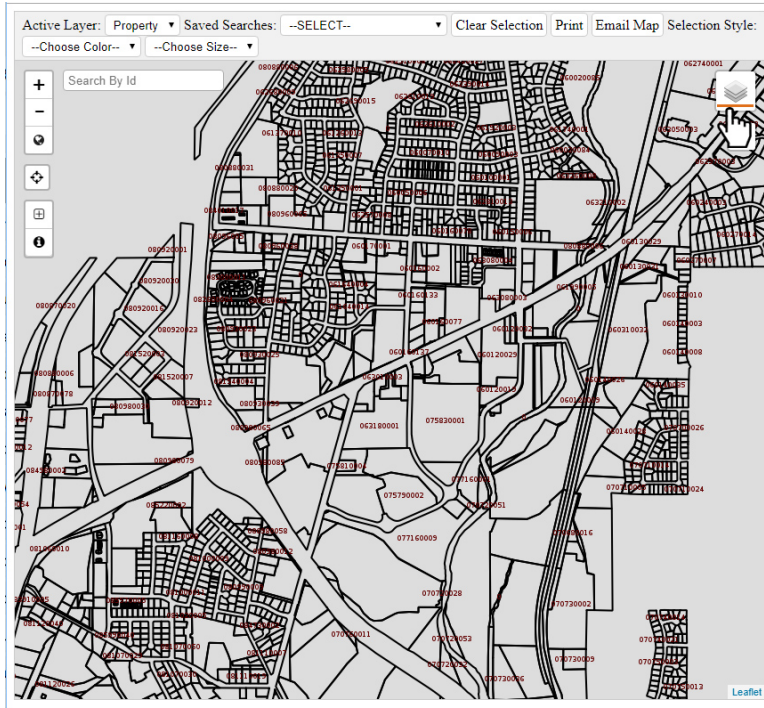Select the background layer to display

Resets the zoom

Finds your current location

Select one or more parcels

Identify a property

Active Layer: Property ▼   Saved Searches: --SELECT-- ▼   Clear Selection   Print   Email Map   Selection Style:

--Choose Color-- ▼   --Choose Size-- ▼

Search By Id

Changing the Background View

1 - To adjust what layer is displayed behind your parcel and work order information, click on the layers button at the top right side of the window. Select an option from the list to change your view.

Viewing Saved Searches

1 - Saved search data in the map can be displayed by selecting a search from the drop-down menu at the top of the window. The results of the search will be highlighted in your chosen color.

2 - To learn more about an asset, click on the identify button and then on the highlighted shape.
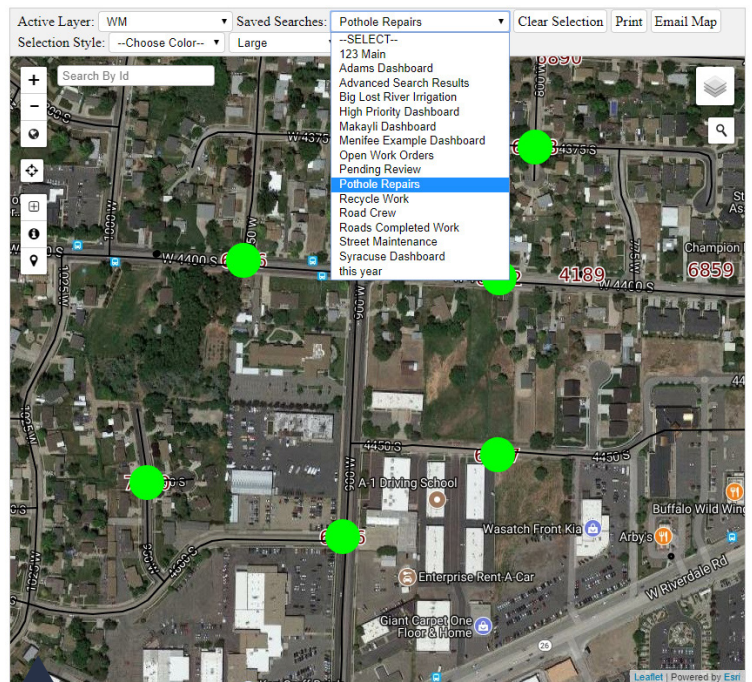
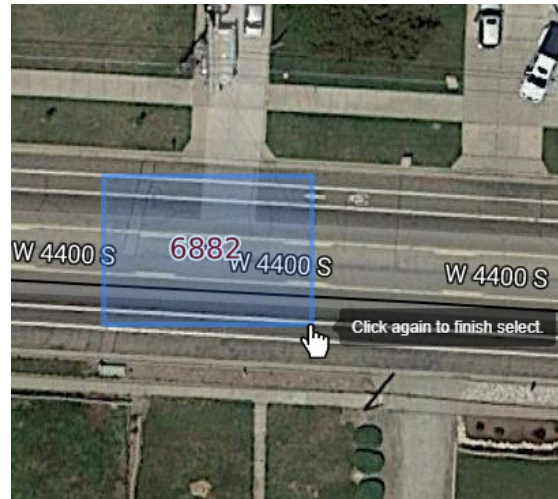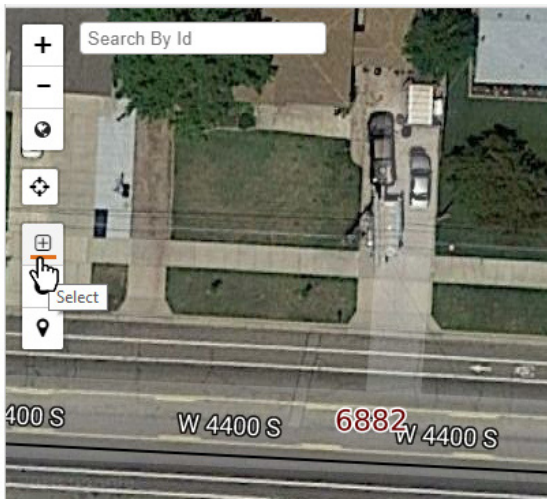# Creating a Work Order in the Field

1 - To issue a new work order while you're on-site, use the current location option to find your location on the map.

2 - Click on the select option and place your cursor and click and draw a rectangle around the asset you would like to select.
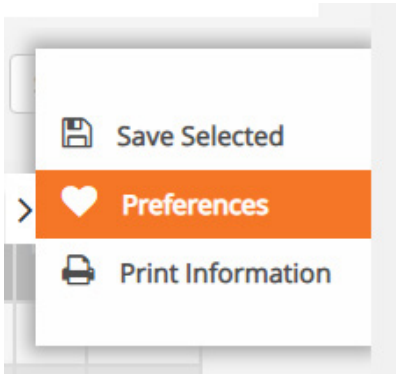

3 - Click on Create New Work Order link.

4 - Choose a template to create the work order from or click on create blank WO.
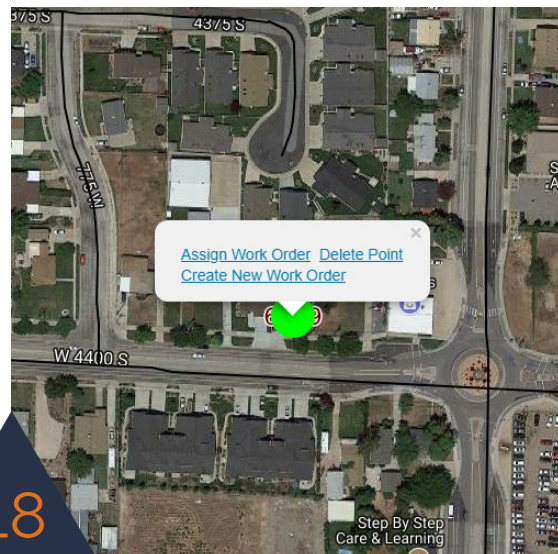
Dashboard Preferences

1 - Customize the size or display of your work order application by selecting the preferences button from the side menu.

🖫	Save Selected
❤	Preferences
🖶	Print Information

2 - From within the preferences window you can select which fields you want to display on your dashboard, how many lines of data you would like to see on one page (using page size) and what size the information is displayed at (using view size).

Permit Preferences ✕

Source	✔
Applicant Name	✔
Sup Type	✔
Applicant Address	✔
City, State, Zip	✔
Issued Date	✔
Phone Number	✔
Expiration Date	✔
Description	✔
Assigned To	✔
Primary Contractor	✔
Unpaid Fees	✔
Map	✔
Valuation	☐
Square Feet	☐
Phone Type	☐
Subdivision	☐
Letter	☐
Inspection	☐
Status	☐

Page Size   30 ▾

View Size   Desktop View ▾

Default Interface
  Default
  Small
  Medium
  Desktop View
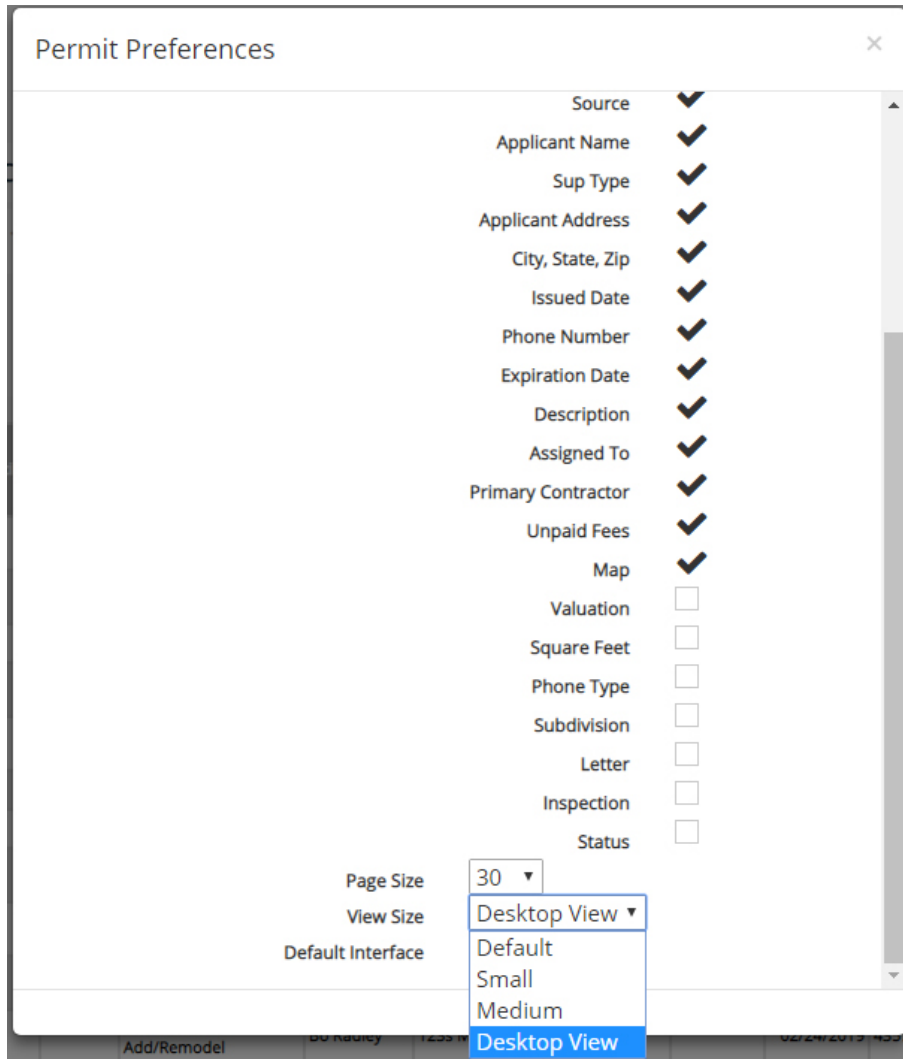
Dashboard Overview

Enter specific parameters to search the data

Create a new work order

View a saved search or specific time frame

Save selected, adjust preferences, print information

Change the details of a work order

| WORK ORDERS | FIELDS | EMPLOYEE | EQUIPMENT | MATERIAL | INVENTORY | SCHEDULE | REPORTS | MAP |

Main   Advanced Search   Open Saved Search   Create WO   WO Templates   Old WM Screen

Select View ▾

ALL

Selected	WO Date	WO #	Project	Requestor Phone Number	Priority Classification	Department	Problem Code	Work Description	Requestor Name	Location Description	District	Date Completed	Status	Map	Edit/View
☐	09/05/2018	7000	Street Repairs		High	03: Street Maintenance Beautification	02: Asphalt Cut Out/Replace	Pothole needs to be repaired ASAP			Millville		Pending	●	✎
☐	09/05/2018	6999			High	03: Street Maintenance Beautification	02: Asphalt Cut Out/Replace			Corner of Smith Ave. and Lincoln St.	Millville		Pending	●	✎
☐	09/05/2018	6998	Street Repairs		Medium	03: Street Maintenance Beautification	02: Asphalt Cut Out/Replace	Pothole needs to be repaired asap					Pending	●	✎
☐	09/05/2018	6997	Street Repairs		Medium	03: Street Maintenance Beautification	02: Asphalt Cut Out/Replace	Pothole needs to be repaired asap					Pending	●	✎
☐	09/05/2018	6996		555-555-5555									0	●	✎
☐	09/05/2018	6995		(605) 753-3535	High	06: Recycling			Lindsay B	111 main street		09/05/2018	Pending	●	✎
☐	09/05/2018	6994		(605) 753-3535	High	06: Recycling			Lindsay B	111 main street		09/05/2018	Pending	●	✎
☐	09/05/2018	6993		(605) 753-3535	High	06: Recycling			Lindsay B	111 main street		09/05/2018	Pending	●	✎
☐	09/05/2018	6992	Street Repairs		Medium	03: Street Maintenance Beautification	02: Asphalt Cut Out/Replace	Pothole needs to be repaired asap					Pending	●	✎
☐	09/05/2018	6991	Street Repairs		Medium	03: Street Maintenance Beautification	02: Asphalt Cut Out/Replace	Pothole needs to be repaired asap					Pending	●	✎
☐	09/05/2018	6990		555-555-5555	High	06: Recycling	02: Sidewalk Repair	huge pothole to be fixed		123 main street	Logan		Pending	●	✎
☐	09/05/2018	6989	Street Repairs		Medium	03: Street Maintenance Beautification	02: Asphalt Cut Out/Replace	Pothole needs to be repaired asap					Pending	●	✎
☐	09/05/2018	6988		435-764-3890	High	06: Recycling			Joel Perkins	123 Street		09/05/2018	Pending	●	✎
☐	09/05/2018	6987		(605) 753-3535	High	06: Recycling			Lindsay Williams	576 E 1000 N #12		09/05/2018	Pending	●	✎
☐	09/05/2018	6986	Street Repairs		Medium	03: Street Maintenance Beautification	02: Asphalt Cut Out/Replace	Pothole needs to be repaired asap					Pending	●	✎
☐	09/05/2018	6985		555-555-5555	High	06: Recycling		huge pothole to be filled		123 main street			Pending	●	✎
☐	09/05/2018	6984			High				Nikki Ethington	Iworq			Pending	●	✎
☐	09/05/2018	6983		555-555-5555	High	06: Recycling							Pending	●	✎

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