
CUSTOMER GUIDE: Work Order Retrieval**Overview**

The FLEETMATE Work Order Retrieval option focuses on existing work orders, and offers a number of features to search your database for existing work orders. The Labor and Parts lines on your work orders may be edited, as well as completion date, completion status, and full description fields.

You cannot add or delete work orders from the Work Order Retrieval program. The program is designed to enable you to retrieve and manage existing work orders only.

The column headings for the work order list area are based on your settings defined in FLEETMATE. This makes the list consistent for all database users.

The Work Order Retrieval program is an optional add-on to the base FLEETMATE software, and must be downloaded and purchased separately. The Work Order Retrieval license is included with any Office license purchase. Simply use your existing Office registration key to license the software at no additional charge.

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Search Options

The Work Order Retrieval software offers the following types of search and retrieval functions:

- **Quick Search - Key Entry and Barcode Scans**
 - By Work Order Number
 - By Part Number
 - By Vehicle Number
 - By VIN
- **Date Range**

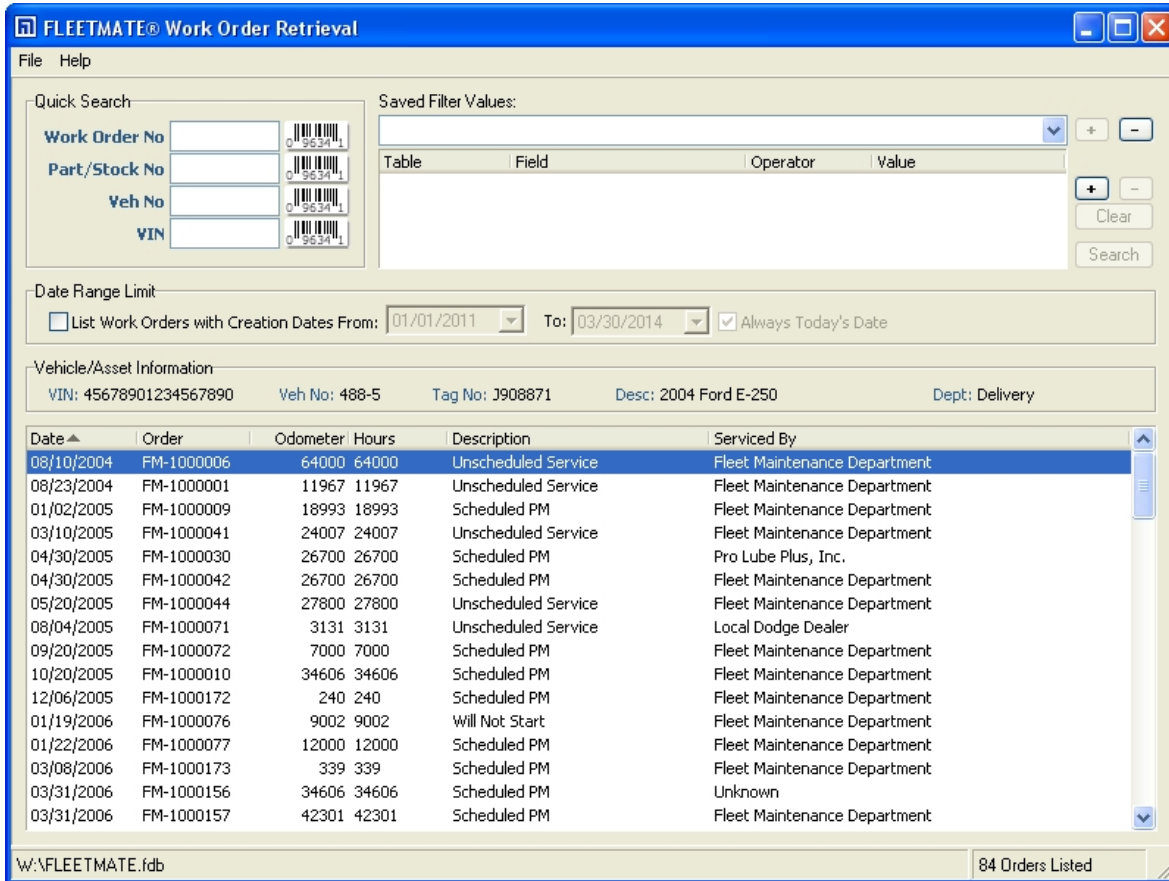
You can limit the above searches to orders created between two dates
- **Complex Filtering**

You can create a complex filter by selecting Tables, Fields, Operators, and Values. These can also be compound filters made up of individual expressions. All individual expressions are ANDed, so all expressions specified must be true.
- **Saved Filters**

You can also choose to save your filters in your FLEETMATE database. This is handy for filter expressions that you use on a repeating, routine basis.

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Main Window Features



Work Order Retrieval Main Window

The main window presents search features in the upper portion of the window. The lower portion of the window will list the work orders that are returned by your search criteria.

To edit any work order listed, double-click on the record. Once the Work Order window appears, it will function much the same way it does within FLEETMATE.

The Status Bar at the bottom of the Work Order Retrieval window will display the full path to the database that is currently open, and will indicate the number of work orders returned by your most recent search.

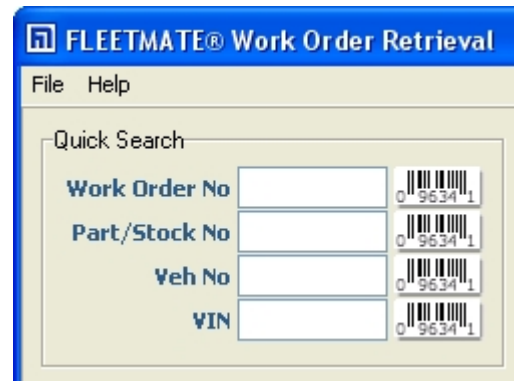
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Quick Search - Key Entry and Barcode Scan

This area of the program will enable you to retrieve work orders using two methods:

- Key-in the value and press the **[Enter]** key on your keyboard
- Scan a barcode value

You can use either method with Work Order Numbers, Part Numbers, Vehicle Numbers, and VINs.



When using the Quick Search method, if only one (1) work order is returned by your search (i.e. in the case of a specific Work Order No), the Work Order window will immediately open on your screen. This will give you quick access to a specific work order with no further action required.

If more than one work order is returned by your search, the resulting work orders will be listed on your screen. You can then choose the work order you need from the list. A double-click will open the selected work order.

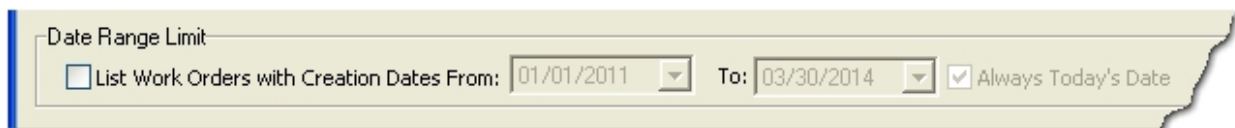
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Date Range Limit

This feature was designed to enable you to quickly list all work orders created within a range of dates. Your last used date values are retained between sessions.

This area of the program enables you to specify a beginning and an ending date. When active, only work orders that were created within the date range specified will be listed.

The Date Range Limit settings, if active, will be used in combination with the Quick Search method of retrieval. In other words, if you scan a work order number, the work order must have been created within the date range specified in order for the work order to be retrieved.



Date Range Limit

The Date Range Limit feature is ignored when searching using a Filter, or a Saved Filter. This is because the filter feature gives you total control over your search criteria, including dates.

To activate your date range retrieval, check the List Work Orders... checkbox, and then re-run your search using the Quick Search area.

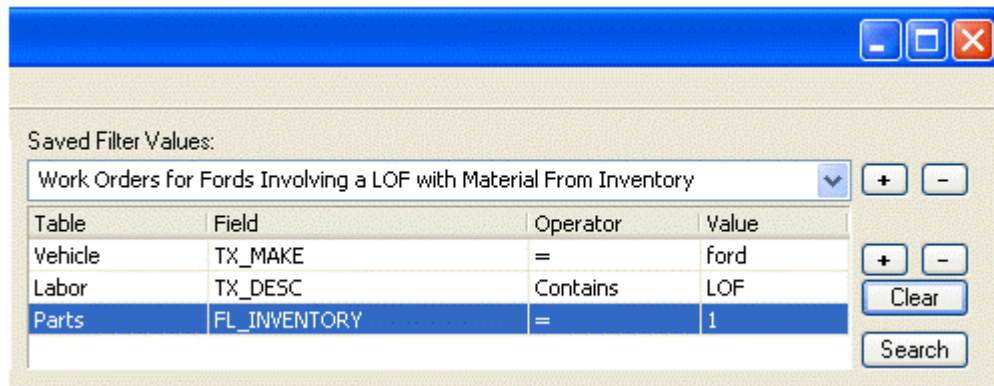
To edit a date, click the download-arrow and select your date from the popup calendar.

To disable your date range, uncheck the List Work Orders... checkbox, and then re-run your search using the Quick Search area. All work orders in your database will then be listed, regardless of creation date.

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Complex Filters

To retrieve work orders that match a very specific set of criteria, you can create a filter.



A Filter Containing Three Conditional Expressions

A filter is made up of one (1) or more conditions. Each physical line in the filter list area represents one (1) condition.

To add a condition, click the [+] button. To delete an existing condition, click it to select it, then click the [-] button. The Table, Field, and Operator columns will present lists of items from which to choose. Set your column values from left to right, beginning with the **Table** you wish to search. You may create conditions that will search the following database tables:

Maintenance
Labor
Parts
Vehicle

Once you select your table, click within the Field cell to select your Field. The fields listed will depend upon the table you have selected.

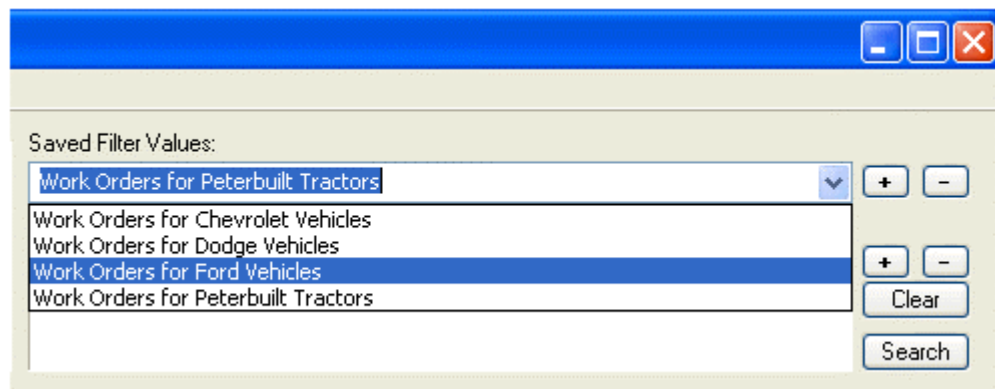
Once you have selected your field, select the Operator you wish to use. The Operators listed will depend upon the field you selected.

Enter the Value you wish to search for and then press [Tab]. You may now click [Search] to execute your search.

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Saved Filter Values

If you find that you repeatedly use the same filter, you can choose to save the filter. You can then reuse the saved filter at any time simply by selecting it from the Saved Filter Values listbox. Saved Filters are global, so everyone else using Work Order Retrieval will see all Saved Filters.



Saved Filters Listbox

To add the current filter to the list of saved filters, click the [+] button to the right of the Saved Filter Values droplist. If the filter previously existed, it will be replaced. This enables to modify existing saved filters.

To clone/copy an existing saved filter, simply rename it to something else and then click the [+] button to the right of the Saved Filter Values droplist.

To select a saved filter, drop the list and click the saved filter you wish to run. This will immediately execute your search using the condition(s) defined within the filter.

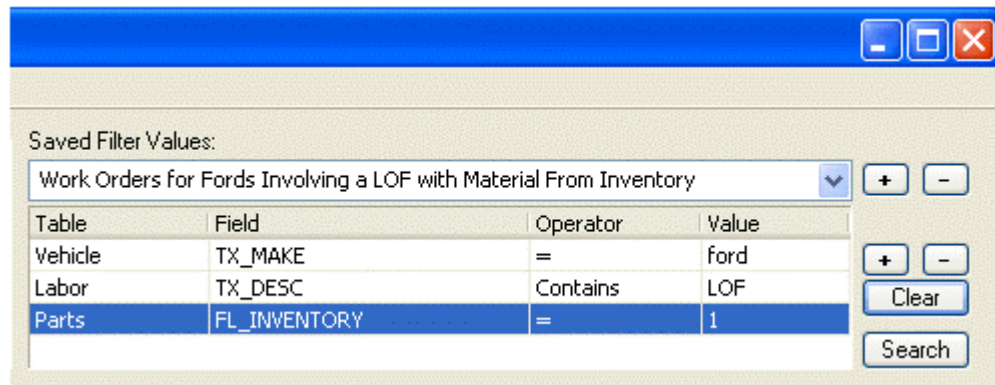
To delete a saved filter, drop the list and click the saved filter, and then click the [-] button to the right of the Saved Filter Values droplist.

You can save any number of filters. All users of the Work Order Retrieval program will see these saved filters.

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Notes Regarding Complex Filters

All individual conditions in your filter are **AND**ed together, and evaluated as a compound expression. There is no support for evaluating conditions using **OR** or **XOR** functions.



A Saved Filter Containing Three Filter Expressions

In the above example filter there are three (3) conditions. If written in English, this filter would read:

- **Return all work orders where:**

The vehicle Make is ford

AND

One (or more) labor lines has a description that contains the text "LOF"

AND

One (or more) parts used on the work order was issued from inventory

Some additional points to consider with this filter are:

- Work orders that do not have parts lines, will not be retrieved.
- This filter does not require that a specific Stock No appear on a work order, only that at least one part was used from inventory.

This filter could be written to be more precise, in the event you wanted to only retrieve only work orders where a specific Stock No was used.

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Additional Notes on Program Use

The Work Order Retrieval application will follow security settings defined in your FLEETMATE database. If you are required to login using a Username and Password when using FLEETMATE, you will also be required to login to the Work Order Retrieval application. Use the same Username and Password when starting Work Order Retrieval.

When security is active, your user profile defined for you by your FLEETMATE administrator must grant rights to edit work orders. Otherwise, your access will be read-only. You can still query your database to search for and view/print work orders, but you will not be able to edit work orders unless you have been granted permission to do so.

When Work Order Retrieval starts it will initially open the database that was last opened using FLEETMATE. You may use the File | Open Database... menu option to select a different database to use with Work Order Retrieval. The software will store this database path for subsequent sessions.

If FLEETMATE was never installed on the PC where Work Order Retrieval is being used, there will be no database on your local disk. Therefore, you will receive an advisory that your database could not be found. In this case, use the File | Open Database... menu option to select and open the database that you need. If you are unsure where your FLEETMATE database is located, please contact your network or IT administrator for assistance.

Saved Filters are not assigned to a specific user. Therefore, anyone using Work Order Retrieval will see all saved filters that are stored in your FLEETMATE Database. Be careful not to delete a saved filter that may have been created by a co-worker for a specific purpose.