Training Guide

SiteNet Training Manual

By Strategic Resource Solutions

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SiteNet Training Manual
Version 1.0

Glossary of Terms

(Item) Description

Description is an informational field that describes the inventory item selected in Item ID.

(Pool) Description

Description is an informational field that describes the pool selected for the inventory adjustment.

Account Description

Account Description is the description of the account chosen in Account ID. This description is determined in the Accounts Form.

Account ID

Account ID is the short name for an account, and is used to associate an account with a specific location. This should be a concise yet understandable code. When accounts are accessed, they are alphabetized by the ID. For example, JE-B (Jones Elementary Budget), GB (General Budget), and INV (Inventory).

Account ID and Description

Account ID is used to associate an account with a specific vendor. For instance, purchases from a lumber company are always charged to the Building account. Make your choice through the drop-down box or double-click inside the box to add or alter current accounts in the Accounts Form. The Description will appear in the box to the right after the selection is made

Accounting Sub-form

The Accounting Sub-form tells what account, payment term, and delivery term is associated with the location.

Action Taken (Preventive Maintenance)

Action Taken is located inside the PM, CM, and Total Maintenance Work Order History windows. This is an informational field that lists the Action Taken with each completed Work Order for that PM task.

Action Taken (Work Order)

Action Taken should be entered after the work order is completed. This field tells what work was actually done, which in some cases is not the same as what is requested. When there are major differences, it is important to document these changes.

Active Vendor

Active Vendor should be clicked if the vendor is currently in business and is being used by your organization. This allows you to make choices based on current vendors.

Activity Description

Activity Description is used to describe the activity during the scheduled time. Once inside the field you will notice arrows on the right side of the screen, which are used to view the description.

Activity Information Screen

Activity Information Screen holds detailed information on facility schedules, including description and the Cost and Time table.

Actual Completion Date

Actual Completion Date tells the actual date of completion for a work order. This field should only be entered after a work order is completed. Entry should be made in standard date format.

Actual kW

Actual kW is the number of kilowatts that were actually used during the billing cycle. The data type is a number.

Additional Cost

Additional Cost should be used for extra costs incurred at the time of fill-up. An example of this is buying a quart of oil.

Additional Information

Additional Information is an informational field derived from Maintenance Assets or from the Tasks Form. This holds any extra information or notes on the vehicle or the task.

Additional Information Sub-form

Additional Information is the last of the four sub-forms in the Inspection Information screen. To access this screen, click-on the button marked Additional Info at the bottom of the screen. This is an area to enter any additional information you may want to know about an inspection or PM Schedule. This is a memo field and the data type is text.

Address

Address identifies the street address of the vendor, employee, or location. Do not put the City, State, and Postal Code in this area. For example: 25 E. Main Street or PO Box 466.

Address Sub-form

The Address Sub-form holds the location's address and distance from the maintenance office. This information can be used when analyzing money and time spent on travel for work orders.

Adjustment Cost

Adjustment Cost is an informational field that tells how much money is lost or gained from the inventory adjustment. This field is calculated by multiplying the Unit Cost by the Adjustment Quantity.

Adjustment Quantity

Adjustment Quantity is the difference between the actual quantity and recorded quantity (New Quantity and Original Quantity). To make a change to inventory, you can enter the difference in this field or the actual quantity in New Quantity. By filling in one of these fields, the other will automatically be filled out.

Adjustment Reason

Adjustment Reason is used to explain why the adjustment was made. Some examples are: Annual Inventory, 3 Bottles broken, and Initial inventory settings.

After Hours?

After Hours? should be clicked on if the facility will be used after normal business hours.

Air Time Charge

Air Time Charge is located inside the cost table. This field tracks airtime charges for cellular calls. The amount entered will be added to the Total Cost of the utility transaction.

Alternate Vendors

Alternate Vendors is a table that tracks any alternate vendors that offer the same inventory item. By choosing the Vendor ID, the Vendor Name will appear. You can also enter the Vendor Item ID.

Area

Area is used as a quick reference to a maintenance asset's location. Ideally, this is the same location as the Reference ID and Full Path Name. The data type is text.

Area Served

Area Served is used to identify the area that the utility serves, or "covers."

Asset

Asset should be clicked on if you are scheduling a single piece of equipment. Whenever an asset requires special attention that cannot be maintained by a Master Schedule, choose to do an Asset Schedule. By choosing asset, all of the fields in the form can be accessed.

Asset Codes

Asset Codes is the third and most specific asset category. For example, in the categories: 1) Hand Tools; 2) Electric Drills; 3) Black and Decker 4110, the Code is Black and Decker 4110.

The Asset Codes screen holds the Code, Description, Manufacturer ID, and Model Number.

- Code is the name of the asset code. This field is system-required, and the data type is text. When an asset code is chosen, this will show up.
- Description gives a more detailed explanation of the asset. This field is system-required, and the data type is text. The Code Description is defaulted as the asset Name. This can be easily changed if needed.
- Manufacturer ID is used to identify the manufacturer of the code (ex: Black and Decker). Make your choice from the drop-down box, or go to the Manufacturer Form by double clicking inside the field.
- Model Number holds the model number of the asset. The data type is text.

Asset Groups

Asset Groups is the first and broadest asset category. For example, in the categories: 1) Hand Tools; 2) Electric Drills; 3) Black and Decker 4110, the Group is Hand Tools.

The Asset Groups screen holds the Group and Description.

- Group is the name of the asset group. This field is system-required, and the data type is text. When an asset group is chosen, this will show up.
- Description gives a more detailed explanation of the asset. This field is system-required, and the data type is text.

Asset ID

Asset ID is a computer-generated number assigned to a maintenance asset after the record is saved. This is an informational field.

Asset Life Folder

Asset Life Folder is the second folder on the bottom of the screen. It contains date and life expectancy information.

Asset Tag

Asset Tag # is a second form of identification for a maintenance asset. In addition to the Asset ID, which is assigned, you can enter your own identification for a particular asset. The data type is text. This ID is used to locate assets in other parts of ACT 1000 System.

Asset Types

Asset Types is the second, or middle, asset category. For example, in the categories: 1) Hand Tools; 2) Electric Drills; 3) Black and Decker 4110, the Type is Electric Drills.

The Asset Types screen holds the Type and Description.

- Type is the name of the asset type. This field is system-required, and the data type is text. When an asset Type is chosen, this will show up.
- Description gives a more detailed explanation of the asset. This field is system-required, and the data type is text.

Assigned To

Assigned To tells what employee is in charge of the work order or PM work order. This is especially helpful if the work order requires more than one employee.

Attendance Code

Attendance Code identifies the type of attendance taken or earned. Enter an easily identifiable code for each type of attendance time that can either be taken or earned. This code is shown on the screen of the Attendance Form. A few examples are Vacation, Sick Leave, Family Emergency, Overtime, etc.

Attendance Description

Attendance Description is the description that correlates to the Attendance Code. In this field, you can be as detailed as you want in describing the Attendance Code. This information can be found in the drop-down box for the Attendance Code of the Attendance Form.

Attendance Summary

By clicking the Attendance Summary button, all attendance transactions will be shown by Attendance Code, Description, and Hours Remaining. To go back to the original screen, click the Hide Attendance Summary button. The Attendance Summary will also show negative hours under Hours Remaining.

AutoLink Message

AutoLink Message will indicate the success or failure of the conditioning of a facility. If Schedule ACT BAS? is checked, AutoLink, which works with ACT 5100, 6100, and 7100 BAS will be activated. This informational memo will tell of any problems encountered while attempting to condition the facility. For more information on energy scheduling, refer to the AutoLink manual.

Automatic

Automatic is a check box that should be selected for ACT 1000 to generate PM work orders automatically the next time the user logs into the application.

AutoPrint Button

By clicking the AutoPrint Button, approved work orders are automatically printed out when saved. Once the button is activated, it will appear a light gray color. The status is changed from Approved to Incomplete once work orders are saved and printed. This feature is defaulted NOT to print work orders automatically and must be activated each time the Work Order Form is opened.

Basic Charges

Basic Charges is located inside the cost table. This field tracks the base charge for a specific utility. Additional charges for special services can be listed in Other Charges. The amount entered will be added to the Total Cost of the transaction.

Beginning Balance

Beginning Balance is a system-required field that gives the initial balance of the account. For some accounts, such as the Budget Account or the General Funding Accounts, this balances begin at the maximum money available and will decrease as the year progresses. Expense accounts will begin at $0 and will increase as spending increases. Inventory accounts will begin at $0 if no there is no inventory; otherwise, it will begin with the amount that is currently in inventory. To learn more about what beginning balances should be for an account, refer to "The three types of accounts" on page 36.

Billed kW

Billed kW is the number of kilowatts billed to your account. The data type is a number.

Billing Period: End Date

End Date indicates the last day of service for a utility billing cycle. This is a system-required field, and can be entered in standard date format ONLY after the Start Date has been entered.

Billing Period: Start Date

Start Date indicates the first day of service for a utility billing cycle. This is a system-required field and can be entered in standard date format.

Bin

Bin identifies the bin of the pool that the item is located. This field is available only if Enter Pool Settings is clicked on. This option should be turned on when setting up initial item information.

Birthdate

Birthdate tells the employee's date of birth. This can be entered in standard date format (08/10/73).

Budget Code

Budget Code identifies the type of budget code for the work order or PM work order. This field also links to an additional information screen, the Budget Codes Form, to add or alter current budget code information.

Budget Code

Budget Code is the short name for a budget code or "type." Some examples are PM for Preventive Maintenance and CM for Corrective Maintenance.

Business Phone

Business Phone is the employee's work telephone number. You may choose to enter only the extension for the employee if all exchanges (first three digits) are the same.

by Employee

by Employee prints work orders assigned to a specific employee. You can make your choice of employee through the drop-down box.

by Group

by Group is a way to generate specific PM work orders. Group is the broadest category of the maintenance asset categories. This field can be used by itself, or in conjunction with Type and Trade Code work orders. Make your choice from the drop-down box.

by Priority

by Priority prints work orders by a specific priority. You can make your choice of priority through the drop-down box.

by Purpose Code

by Purpose Code prints work orders by a specific purpose code. You can make your choice of purpose code through the drop-down box.

by Reference ID

by Reference ID prints work orders by a specific Reference ID. You can make your choice through the drop-down box.

by Status

by Status prints all work orders for the specified status. You can make your choice of priority through the drop-down box.

by Trade Code

by Trade Code prints work orders by a specific trade code. You can make your choice of trade code through the drop-down box.

by Type

by Type is a way to generate specific PM work orders. Type is the second category of the maintenance asset categories. This field can be used by itself, or in conjunction with Group and Trade Code work orders. Make your choice from the drop-down box.

Can be a Manager

Can be a Manager should be clicked if the employee can be a manager in the trade chosen.

Cancel (Create Pick List)

Cancel is used to stop any selections that have been made. No requests will be included in the Pick List if you cancel the form.

Cancel (PM Work Orders)

Cancel is a button that closes the screen and cancels the request to generate PM work orders.

CCFs

CCFs should be clicked if the gas is measured in CCFs, which equals 100 cubic feet.

Cellular Number

Cellular Number is the mobile or car phone number for the vendor contact or employee.

Certificate of Insurance?

Certificate of Insurance? should be clicked on if the organization using the facility has a Certificate of Insurance on file.

City

City identifies the city for the address of the vendor, employee, or location.

Code

Code is a way to categorize assets. It is the third most specific asset category. For example, in the categories, 1) Hand Tools, 2) Electric Drills, 3) Black and Decker 4110: the Code is Black and Decker 4110. This field also has access to an additional information screen, the Asset Categories Form, to add or change current asset Code.

Color

Color identifies the color of the car.

Commit Inventory

Commit Inventory indicates whether or not adjusted, transferred, or incoming inventory will be held for requests on Material Delay. If inventory becomes available that is needed by a request in the Inventory Request Form, it can be held for requests. When inventory is transferred between Pools and the new pool matches the Suggested Pool ID of an inventory item that is being requested, the inventory can be held. If requests in the Inventory Request Form are waiting for the item being received and the button is clicked-on, the inventory will be committed. To hold, or "commit" inventory requests in the Inventory Request Form, the button must be clicked on. The default for this field is established in Properties for the Inventory Request Form, which is found in System Configuration. You are not limited to a default though. You can turn this feature on or off for individual invoices.

Committed Quantity

Committed Quantity is an informational field that tells if inventory is being reserved, and if so, how much. If inventory is approved, the amount available will be displayed. If the request was approved and the amount is "0," the request is on Material Delay.

Commodity Code

Commodity Code identifies what type of product the inventory item is. For example, a Plumbing item could be found in both Mechanical and Custodial Inventory.

Commodity Code

Commodity Code is the short name for the type of material. For example, EL for Electrical and PL for Plumbing. When choosing a commodity in a drop-down box, the choices are listed alphabetically by Commodity Code. When creating Commodity Codes make sure the codes are short yet understandable.

Completed Requests (button)

By clicking the Completed Requests button, you can view all completed inventory requests. After inventory is issued or marked as Complete after a partial delivery, it can be found on the Inventory Request History.

Completion Date

Completion Date is located inside the PM, CM, and Total Maintenance Work History windows. This is an informational field that lists the actual Completion Date with each completed Work Order for that PM task.

Contact Address

Contact Address holds the address of the contact person or organization making the request.

Contact Person

Contact Person is the person responsible for a particular facility schedule. This individual should be contacted for further facility use information. This is a system-required field.

Contact Person

Contact Person identifies the name of the person to be contacted if anyone needs to be reached.

Contact Sub-form

The Contact Sub-form holds information about the contact person for the location. This can be an administrator, teacher, etc.

Contract ID

Contract ID should be used when an organization has a contract with a organization and the number or ID needs to be documented.

Cost per Day

Cost per Day is an informational field that tells the utility's cost per day in that particular billing cycle.

Cost per Gallon

Cost per Gallon is an informational field that calculates the average cost of water per gallon.

Cost per kWh

Cost per kWh is an informational field that tracks the average cost per kilowatt used.

Cost per Minute

Cost per Minute is an informational field that calculates the average cost of telephone use per minute.

Cost per Ton

Cost per Ton is an informational field that calculates the average cost of each ton of coal.

Cost per Unit

Cost per Unit is an informational field that calculates the average cost per gallon, pound, CCF, Therm, or Kilojoules (depending on which one you are using) of gas.

Cost Table

The Cost Table is located on the lower left side of the utility analysis screens. It tracks all cost information, both positive and negative. Some of the utilities will contain specific cost fields such as Long Distance Charges for Telephone. Each of these fields is explained in the individual utility section.

Cost/Gallon

Cost/Gallon is the amount of money per gallon of gasoline. This field is automatically filled-in if the Gallons and Fuel Cost are entered.

Country

Country is the country of the vendor or location. This field is especially helpful when vendors produce materials out of country. Ex: China, USA, Thailand.

Create Pick List

Create Pick List should be chosen after all selections are made. Selections can be made individually by clicking Include in Pick List or by choosing the Select All button at the bottom of the screen. This button will print the Pick List and provide a Pick List Number to help identify it. The status of all requests that are included in the Pick List will automatically change to Incomplete.

Credit Limit

Credit Limit tells your credit limit with the vendor. The credit limit can be for a single "order" or it can be a total of all orders. Whichever type of limit you are tracking, keep it consistent with each vendor. For example, when J&M Electrical Supplies has a credit limit of $5000.00 per order.

Credits

Credits is located inside the cost table. This field tracks any previous credits you may have. The amount entered will be subtracted from the Total Cost of the utility transaction.

Current Balance

Current Balance tells the balance of the account. This balance is calculated from various fields such as Issued From, Issued To, Funded By, and Expensed To that will either add or subtract money from an account. Budget accounts are subtracted from, Expense accounts are added to, and Inventory accounts do both.

Current Work Order

Current Work Order # prints the work order currently on the screen. This option is only available when the print button is clicked from the Work Order Form.

Cylinder Number

Cylinder Number identifies the Cylinder Number for a specific key. The data type is text.

Data Line Number

Data Line Number is the telephone number for a line dedicated to data transfer. These lines are normally connected to a modem or computer.

Date

Date identifies the date on which a certain transaction occurred. By default, the current date is used, but can be easily changed to any date.

Date (work order printing)

Date prints work orders entered on a specific date to another date. For instance, you may want all the work orders in September. Enter 9/1/95-9/31/95.

Date Acquired

Date Acquired identifies the date that the maintenance asset was purchased or received in standard date format.

Date Discontinued

Date Discontinued is an informational field that is filled in when Discontinued is checked. This date signifies when the item will no longer be reordered or issued.

Date Hired

Date Hired identifies the date that the employee was hired.

Date Issued

Date Issued is the date that the key is issued. This defaults to the current date. If you need to change the date, you can enter it in standard date format.

Date Last Promoted

Date Last Promoted identifies the last date of promotion for the employee.

Date of Use

Date of Use is a system-required field that identifies the date that the facility will be used. The date should be entered in the standard date format.

Date Picked

Date Picked is a system-required field that identifies the date that the inventory was pulled. It is defaulted to the current date, but can easily be changed.

Date Placed in Service

Date Placed identifies the maintenance asset's first date of use in standard date format.

Date Received

Date Received tells the date that the work order or request was received. The current date is defaulted, but it can easily be changed using standard date format.

Date Returned

Date Returned is the date that the key is returned. This should be entered in standard date format.

Date Started

Date Started tells the date that work actually began on the work order. This is especially useful if there is a lapse in time between when the work was received and started. Entry should be in standard date format.

Date Submitted

Date Submitted is a system-required field that defaults to the current date. If a different date is desired, it can easily be changed.

Date/Time Reviewed

Date/Time Reviewed tells the date and time that the status of the request is changed from Submitted. When an item is Approved, Rejected, Voided, or marked as Duplicate, the date and time of the change is automatically entered into the field. For requests with a Material Delay status, this field holds the date and time that the request was approved.

Date/Time Submitted

Date/Time Submitted is an informational field that tells the time and date that the request was received or entered into the Inventory Request Form or ACT 1000 System.

Deductions

Deductions identifies any deductions to be made in an employee's pay. For example, if $30 is deducted for Insurance every month, it should be entered here. When tracking deductions, make sure that each employee's deductions are standard. For example, if you choose to track deductions by month, do this for all employees. Some people may prefer to track deductions by year, week, or pay period.

Default Pool Table

The Default Pool Table allows you to set up default pools for inventory items being requested. You can choose any available Pool for the three inventory types. The default will appear in the Suggested Pool ID field in the Inventory Request Form.

Deliver To

Deliver To identifies the person who will receive the request when it is delivered. Depending on user preference, you can enter the name of the individual who will hand the item out at the site or the actual person who will receive the item. For example, if a teacher asked for a broom for her classroom, you can enter either her name or the name of the maintenance employee who will receive the broom first.

Delivered Quantity

Delivered Quantity is an informational field that identifies the number of items that have been previously delivered for the request. **This number does not include the Quantity Picked. This number will be 0 unless there was a Material Delay and a partial delivery was made. In this case, the quantity requested, picked, and delivered will reflect this. To find the total quantity requested, add the Delivered Quantity with the Quantity found in the Inventory Request Form.

Delivery Terms

Delivery Terms is used to associate a location with a specific way that materials will be delivered. For example, 6-8 (6-8 weeks) and Net 30 (30 days after the order is received).

Delivery Terms Code

Delivery Terms Code tells how a vendor will deliver materials. For example, 6-8 (6-8 weeks) and Net 30 (30 days after the order is received). This code should be concise yet easily recognizable. When delivery terms are looked up, they are alphabetized by the Delivery Terms Code.

Delivery Terms Days

Delivery Terms Days tells how long it will be before materials are received after the vendor receives the order. This number is used to approximate the delivery date. This is an informational field.

Demand Charge

Demand Charge is located inside the cost table. This field tracks supply and demand charges. The amount entered will be added to the Total Cost of the utility transaction.

Department ID

Department ID is the short name for a department. For example, instead of entering Smith High -West Building, you can call it Dept 3-A. Another suggestion, use a naming system that can also be used in Employee IDs. For example, if departments are numbered (100,200,300), employees in the department can be identified easily. Sample Employee IDs with Department ID 200: 20015, 20044, or 215, 244.

Department Name

Department Name is an informational field that tells the name of the employee's department chosen in Employee ID.

Department Name

Department Name identifies the department to which the employee belongs. Make your choice from the drop-down box, or click inside the field to go to the Employee Department Form. Make sure to set up your department structure before assigning employees. For example: Maintenance Department, Custodial Department.

Department Organization

Department Organization lists the structure the department being viewed. The lineage for the department that the cursor is in will be shown.

Description

Description identifies the preceding field. This field may or may not be system-required.

Description

Description is a system-required field that defines the Code, Type, or ID.

Description (of hazard) at Location

Description at Location is a description of the hazard in that particular location. For instance, if asbestos is identified, use the description field to indicate where and how much is present.

Deselect All

Deselect All can be chosen if Select All has been chosen and needs to be taken off. For tips on selection refer to the explanation on the Create Pick List Form.

Discontinued

Discontinued should be clicked if an item is no longer available or needed. Discontinued items cannot be issued. Therefore, it is important to issue all of an item before it is discontinued. Discontinued items will not appear in drop-down boxes for selection in receiving, transferring, issuing, etc.

Discounts

Discounts is located inside the cost table. This field tracks any discounts received. The amount entered will be subtracted from the Total Cost of the utility transaction.

Driver License

Driver License # identifies the employee's state driver's license number.

Driver License Type

Driver License Type identifies the type of vehicle(s) that an employee is licensed to drive. This is also referred to as Vehicle Classifications and/or Endorsements. This field is helpful in identifying individuals that can drive vans and buses.

E-Mail Address

E-Mail Address identifies the e-mail address of the vendor contact, employee, or contact person. For example: jspencer@bjd.com.

Emergency Contact Number

Emergency Contact Number gives the telephone number of the Emergency Contact Person.

Emergency Contact Person

Emergency Contact Person identifies the person to call in case of an emergency involving the employee.

Employee ID

Employee ID is a system-required field that identifies a particular employee. This field also links to an additional information screen, the Employees Form. To enter in new employees or alter current employee information, go to this screen.

Employee ID

Employee ID identifies the employee. When assigning Employee IDs, you can use previously established numbers or create a new methodology to identify employees. A suggestion: begin the ID with the department identification, then the employee #. For example, the Operations department is identified with the number 300. An employee's Employee ID in this department is 30018.

Employee Name

Employee Name is an informational field that tells the name of the employee chosen in Employee ID.

Employee Type

Employee Type is an informational field that tells the employee's type that was chosen in Employee ID.

Employee Type

Employee Type allows you to classify your employees into types. A few examples are PT for part time employees, I for internships, and S for summer employees.

Employment Information Sub-form

Employment Information Sub-form is located on the lower half of the Employees Form. This Sub-form holds information concerning an employee's salary, date of hire, etc. To access this sub-form, click the Employment Information tab.

Enter Pool Settings

Enter Pool Settings should be checked when entering initial quantities and location information for an item. When this option is checked, the following fields will appear at the bottom of the screen: Aisle, Bin, High Quantity, Low Quantity, and Minimum Reorder Quantity. These settings indicate the location and quantities for the item in the pool selected. This option is especially helpful when setting up inventory items. This information can also be found in the Inventory Form.

Equipment Charges

Equipment Charges is located inside the cost table. This field tracks charges for equipment rental or purchasing. The amount entered will be added to the Total Cost of the utility transaction.

Estimated Cost

Estimated Cost is used to enter the estimated cost for your work order or PM work order.

Estimated Hours

Estimated Hours is used to enter the estimated time in hours for your work order or PM work order. If fractions of Hours are used, they will be rounded to the hundredth place. For example, 1.66=1 hour and 40 minutes.

Expensed To

Expensed To is a system-required field that identifies the account that a transaction is "assigned" or charged to. For example, for utilities, a $2,000 Electrical bill is deducted, or Funded By the Organization Budget and is Expensed To Purchased Services. By expensing costs, it is easy to track money spent by different accounts. From this field you have access to the Accounts Form, which is an additional information screen where you can alter current account information or add new accounts.

Expensed To

Expensed To identifies the account that the employee's labor or work is charged to. For example, an employee is Funded By the Budget and is Expensed To the Jones Elem. Maintenance Budget. By expensing costs it is easy to track how much money each account uses. Make your choice from the drop-down box. From this field, you have access to the Accounts Form, which is an additional information screen where you can alter current account information or add new accounts.

Extension

Extension is the employee's business telephone extension number. If voice mail is available, this is often the same number.

Facility Scheduling ID

Facility Scheduling ID is a unique identification that is generated after a scheduling record is saved.

Fax Number

Fax Number identifies the fax number of the vendor or location.

Federal ID

Federal ID # is the federal identification given for the vendor. Some countries provide identification for producers of materials. If this is the case, and this information needs to be tracked, enter the ID here.

First Name

First Name identifies the employee's first name.

Fuel Charge

Fuel Charge is located inside the cost table. This field tracks the base amount for the fuel received (gas or coal). If this amount is entered in Basic Charges, do not enter it here also. The amount entered will be added to the Total Cost of the utility transaction.

Fuel Cost

Fuel Cost is the total amount of money paid for the gasoline. This field is automatically filled-in if the Gallons and Cost/Gallon are entered.

Fuel Meter Reading

Fuel Meter Reading should be used if a facility tracks its own fuel tank use. The reading should be a number available on the tank.

Fuel Type

Fuel Type is located inside the vehicle data folder. Choose the type of fuel suggested for use in the vehicle from the drop-down box.

Full Path Name

Full Path Name is an informational field that identifies the full path name for the Reference ID selected.

Full Path Name

Full Path Name is the complete lineage for the SiteNet Path. This structure is established in the Path Editor of the SiteNet Manager.

Funded By

Funded By is a system-required field that identifies the account that pays for or "funds" the transaction. In most cases, this is an account for the organization budget or general budget. From this field you have access to the Accounts Form, which is an additional information screen.

Funded By

Funded By identifies the account that funds, or pays, the employee. Money will be deducted from this account, which is commonly a organization or general account whenever the employee does work on a work order. Make your choice from the drop-down box. From this field, you have access to the Accounts Form, which is an additional information screen that allows you to alter current account information or add new accounts.

Gallons

Gallons is the number (whole or fraction) of gallons that was used to fill-up the vehicle's fuel tank (Vehicle Fuel Usage Form). This field is automatically filled-in if Cost/Gallon and Fuel Cost are entered. Gallons can also be a check box used to indicate whether you want to use Pounds or Gallons of fuel (Utility Analysis Form).

Gallons per Day

Gallons per Day is an informational field that calculates the average gallons of water used per day.

Generate PM Work Order

Generate PM Work Order is a button to click-on when you are ready to generate work orders. Be sure that you have made whatever selections necessary by Group, Type, or Trade Code before clicking this button. If no selections are made, all work orders will be generated.

Generate Work Order

Generate Work Order should be clicked on if you want to create a Work Order in association with that particular Facility Schedule. For example, if the walls need to be painted in order to hold a dance, press this button and the Work Order Form will appear. After approving the form and saving the Work Order, close the screen, and the Facility Scheduling Form should reappear.

Group

Group is a way to categorize assets and masters. It is the first and broadest category. For example, in the categories, 1) Hand Tools, 2) Electric Drills, 3) Black and Decker 4110: the Group is Hand Tools. This field also has access to an additional information screen, the Asset Categories Form, to add or change current asset Groups.

Hazards Sub-form

The Hazards Sub-form tracks hazards found in the location. For instance, some rooms may contain asbestos. The types of hazards available are established in the Location Hazards Form. Choose what type of hazard a location has in the field: Type of Hazard. In the Description field, enter information specific to the hazard in that specific location. This is a good place to tell exactly where and "how much" of the hazard is present. To add a hazard type, click inside the field to go to the Location Hazards Form.

High (Quantity)

High identifies the high level of quantity for the item. This field is available only if Enter Pool Settings is clicked on. This option should be turned on when setting up initial item information.

History

History tracks Inventory being received, issued, and changes in Unit Cost. By choosing to view, the item's Issued History, the following information will appear for each transaction:

- Date
- Reference ID
- Full Path Name
- Quantity
- Unit of Issue
- Unit Cost
- Total Cost

By viewing the Received History, the following information will be listed:

- Date
- PO Number
- Vendor ID
- Quantity
- Unit of Receipt
- Unit Cost
- Total Cost

By viewing the Unit Cost Modifications, the following information will be listed:

- Old Unit Cost
- New Unit Cost
- Date Changed
- Changed By

Home Phone

Home Phone is the employee's after work telephone number.

Hook ID

Hook ID is used to classify keys. The term hook comes from key hooks that tell where a key opens. The data type is text. Multiple keys can be on the same hook. This is a system-required field.

Hourly Rate Charged

Hourly Rate Charged is the amount of money charged for the labor type chosen. For example, Joe's services are charged out to the organization at $10.00 per hour. This may not be the amount that he actually receives, but is the amount that is charged.

Hourly Rate Paid

Hourly Rate Paid is the amount of money paid to an employee for the labor type chosen for that employee. For example, an organization is charged $10.00 per hour for Joe's services, but Joe is paid $8.00. $8.00 should be entered into the Hourly Rate Paid.

Hours

Hours is a system-required field that tells the amount of time needed for facility use or how long an employee worked on a work order (depending on which screen you are using). You can enter whole numbers (1,2,3) or any fraction of an hour (1.5, 1.2222, and 4.0).

In Service

In Service is located inside the vehicle data folder. This field is a check box to click-on if the vehicle is currently in service.

Include in Pick List

Include in Pick List should be checked to select the item to be part of the pick list. This button should be used for individual selections. The Select All button is used to choose all requests. After all requests have been selected, click Create Pick List to print the list.

Inspection Information Button

The Inspection Information Button is located in the Inspections window. This button can only be accessed if all required information is entered. By clicking on the button, the Inspection Information Screen appears. Detailed information in this screen is provided in the Inspection Information Form section.

Inspection Scheduling Box

The Inspection Scheduling Box is located on the right side of the Work Order Info and Material Lists screens. With this box, you can decide when to schedule PM work orders. You can schedule the frequency by either weeks or intervals, depending on your preference.

Inspections Window

The Inspections Window is one of the four windows located at the bottom of the PM Schedules Form. This window is defaulted to appear on the form because information in the window must be completed before accessing the other windows. An important feature of this window is its access to the Inspection Information screen, through the button located to the right of each task information.

Interval Scheduling

To access Interval Scheduling, click-on the button marked Interval Scheduling at the bottom of the Inspections Scheduling Box. The box is defaulted to Weekly Scheduling, which schedules PM work orders by week. To schedule by intervals, enter the frequency in the first field and the type if interval in the second field. The frequency should be entered in standard number format, and the interval choices are listed in a drop-down box:

- Miles
- Kilometers
- Hours
- Days
- Weeks
- Months
- Years

You can also enter a second frequency scheduler. A PM will be scheduled when the first of the two choices occurs. For instance, for vehicle maintenance, you may need to change the oil every 5,000 miles or every 5 months.

Inventory Cost

Inventory Cost is an informational field that tells the total cost for inventory used for the work order.

Inventory Type

Inventory Type identifies the type of inventory the asset is. Your choices are: Mechanical, Custodial, Instructional, or Other.

Invoice Number

Invoice Number is used for invoices received from stores or businesses. The data type is text.

Issue Inventory

Issue Inventory should be clicked after the Pick List Number, Picked By, Pick Date, and any changes to Quantity have been made. By clicking this button, the items listed, along with their amounts, are issued from inventory.

Issued From

Issued From is a system-required field that identifies the account that holds the inventory. This should be the same account from the Inventory Received Form that the inventory was Issued To. For example, if the inventory is Issued To the Inventory account when it is received, it should also be taken out (Issued From) of the Inventory account when it assigned a new account. From this field you have access to the Accounts Form, which is an additional information screen where you can alter current account information or add new accounts.

Issued To

Issued To is a system-required field that identifies the account that receives the inventory. As a general example, inventory received is Funded By the Organization Budget and Issued To the Inventory account. It is held here until it is issued to a specific account. From this field you have access to the Accounts Form, which is an additional information screen where you can alter current account information or add new accounts.

Item Description

Item Description is the description of the Item ID for the inventory being requested. It is an informational field derived from the Inventory Form.

Item ID

Item ID is a user-defined field that is system-required. This field "defines" the item. When an inventory item is referenced, whether it is for purchasing or issuing, the Item ID is referenced. The data type is text. The following special characters are not allowed in the Item ID: ~`!@#$%^&*()-_=+\{}[];:'"<>?/.,.

Key ID

Key ID identifies the specific key. This is a system-required field, and the data type is text. Although some keys may share a Hook ID, each key must have an individual Key ID.

Kilojoules

Kilojoules should be clicked if the gas is measured in Kilojoules (an energy unit used for measuring gas for heating).

kWh per Day

kWh per Day is an informational field that tracks the average number of kilowatts used per day.

Labor Cost

Labor Cost is an informational field that tells the total cost for employee labor for the work order.

Labor Rates Sub-form

Labor Rates Sub-form is located on the bottom-half of the Employees Form. This Sub-form identifies the employee's pay with different Labor Types. For instance, if an employee is working overtime, he receives $14.00. For regular time, the same employee receives $10. To access this sub-form, click the Labor Rates tab.

Labor Type

Labor Type is a system-required field that tells the type of labor performed by the employee. For example, your choice may be regular and overtime. Your Rate will vary depending on what type of labor.

Labor Type

Labor Type tells the type of labor that the employee can perform. The purpose of this form is to assign employee pay to specific labor types. Labor types are based on different pay types. A few examples are regular, overtime, holiday time, etc. Enter all labor type used to classify employee pay. The Labor Type, which is designed to be a quick, or short reference, is used in the Work Order Form to identify the type of work an employee has done. Make sure that these codes are easily recognizable. A few examples: R for regular time and O for overtime.

Last Activity Date

Last Activity Date is an informational field that gives the last date that the item was used in some way, whether received, transferred, issued, or adjusted.

Last Date

Last Date identifies the date of the Last PM Work Order for the PM Schedule. The data type is text.

Last Day of Employment

Last Day of Employment tells when the employee stopped working for your organization. This date should be entered in standard date format once an employee leaves. For example: 12/20/95. Once a date is entered in this field, the employee will no longer be available in employee lists.

Last Measured Unit

Last Measured Unit is located inside the main folder. It can be used on maintenance assets to track kilometers, miles, or hours. Enter the most recent measurement in number format.

Last Name

Last Name identifies the employee's last name.

Last PO

Last PO # is used to purchase items, and is calculated by the program. It should not be changed unless there are discrepancies.

Last Unit

Last Unit identifies the last recorded unit for the PM Schedule. For example, for vehicle preventive maintenance you may want to record the odometer reading. The data type is a number. It is up to you to remember the type of unit you are using.

Last WO ID

Last WO ID identifies the most recent Preventive Maintenance Work Order for the PM Schedule. The data type is text.

License Plate

License Plate # is located inside the vehicle data folder. This is the state-identified "tag" number. The data type is text.

Life Expectancy

Life Expectancy is located inside the asset life folder. By using this field in conjunction with the Unit Type, you can track the life expectancy of the asset. Enter the number, either in whole or decimal form.

Local Charges

Local Charges is located inside the cost table. This field tracks the charge for local calls. If this is the same amount as Basic Charges, do not enter the amount twice. The amount entered will be added to the Total Cost of the utility transaction.

Lock Changed

Lock Changed refers to the date that the lock was changed since being installed. Entry can be made in standard date format.

Lock Installed

Lock Installed refers to the date that the lock was installed. Entry can be made in standard date format.

Long Distance Charges

Long Distance Charges is located inside the cost table. This field tracks the charge for long distance calls. If this amount is part of Basic Charges, do not enter the amount twice. The amount entered will be added to the Total Cost of the utility transaction.

Low (Quantity)

Low identifies the low level of quantity for the item. Once the quantity reaches this point, the item should be reordered. This field is available only if Enter Pool Settings is clicked on. This option should be turned on when setting up initial item information.

Make

Make identifies the Make for a specific key.

Manufacturer ID

Manufacturer ID tells the manufacturer-defined identification number. This field also links to an additional information screen, the Manufacturer Form. To enter additional manufacturers or change current information, go to this screen.

Manufacturer ID

Manufacturer ID identifies the manufacturer of an item. A few examples are BD for Black and Decker and MS for Microsoft.

Master

Master should be clicked if you are scheduling a group of assets (pieces of equipment). When the tasks to perform the work order are the same for more than one piece of equipment, choose a Master Schedule. You can schedule equipment by Asset Groups and Asset Types. For example, you can do a single schedule for all Heaters, which is a Group, and a separate schedule for all Trane Heaters, which is a Type of Heaters.

Materials List

Materials List is the third of the four sub-screens that appear at the bottom of the Inspections Information Form. The sub-screens default to Work Order Info, and the Materials List can be accessed by clicking the bottom marked Materials List. This sub-screen keeps up with inventory items and purchased items used for the PM Schedule.

Materials List Folder

Materials List Folder is the second folder on the bottom of the Maintenance Assets Form. This should be used if the maintenance item is a part of inventory.

Max Units b/t Fill-ups

Max Units b/t Fill-ups is located inside the vehicle data folder. This shows the maximum number of units, which could be anything from miles, hours, or days between fill-ups. The data type is a number.

Maximum Occupants

Maximum Occupants identifies the maximum number of occupants the location can seat/handle. This field is designed for locations that are rooms and buildings. For example, the Maximum Occupancy for the Cafeteria is 220.

Meter Factor/Size

Meter Factor/Size is used on accounts with an identifiable factor or size. The data type is text.

Meter/Account ID

Meter/Account ID is a system-required field that identifies the utility account or meter for your transaction. You can use the ID designated by the utility vendor or make your own.

Middle Name

Middle Name identifies the employee's middle name or initial.

Mileage Rate

Mileage Rate is located inside the vehicle data folder. This is the average number of miles per gallon of gasoline from a vehicle.

Mileage to Maintenance Office

Mileage to Maintenance Office tells the number of miles from the main maintenance office to the location. This is especially helpful when evaluating costs and time incurred for work orders. For example, it is 13 miles to Jones Elementary to the maintenance facility. Each time a trip is taken to the organization, it is 26 miles round trip. This information can be compared to the data entered into the Vehicle Travel Sub-Form of the Work Order Form, in the ACT 1000 System.

Mileage/Hourly Rate

Mileage/Hourly Rate is an informational field that tells the cost per hour or mile for the vehicle.

Miles/Hours

Miles/Hours is a system-required field that tracks either the miles or hours used on the vehicle for the work order.

Minimum Order Amount

Minimum Order Amount is used when the vendors or your organization requires a certain amount to order materials. If the minimum order amount is not met and items are still ordered, often there is an additional charge. Enter this information in the Surcharge field and make a note of it in the Notes field.

Minimum Reorder (Quantity)

Minimum Reorder identifies the ideal amount for reorder. When ordering the item, the minimum reorder quantity should be considered. This field is available only if Enter Pool Settings is clicked on. This option should be turned on when setting up initial item information.

Minutes per Day

Minutes per Day is an informational field that calculates the average minutes of telephone use per day.

Model

Model is located inside the vehicle data folder. This field identifies the model of the car, and the data type is text. For example, with a Ford Explorer, Explorer is the model.

Model Number

Model Number identifies the model number of the inventory item or maintenance asset. The data type is text.

Name

Name is used as a quick reference to a maintenance asset. In most cases, an asset will be categorized by Group, Type, and Code, but occasionally it may require additional categorization, or quick look-up. An example is New B&D4110 Drill or Joe's Truck.

Name

Name the name of the location. By default, the Name will be the path name, which is the last section of the Full Path Name.

National Employee Number

National Employee Number is used for countries that assign a national employee number, which can be entered in text format. For example, in Australia, each employee is assigned an identification.

New Quantity

New Quantity is the actual quantity of an inventory item in the pool. This number can greater than or less than the Original Quantity. New Quantities are often entered after inventory is taken or to record initial quantities of an item. To make a change to inventory, you can enter the difference in this field or the difference in Adjustment Quantity. By filling in one of these fields, the other will automatically be filled out.

Next Evaluation Date

Next Evaluation Date identifies the date for which the next employee evaluation is scheduled. For example: 11/11/97.

Non-Asset

Non-Asset should be clicked whenever equipment is not being scheduled. For instance, Lawn Care is a Non-Asset schedule. Asset fields are not available for Non-Assets.

Notes

Notes is a place to put any additional information for a form. Usually, Notes is a good place to record additional information on a utility account, a fill-up, explanations of unusual numbers or excessive fuel usage, or explanations for material delays or problems with inventory request.

Notes

Notes is used to keep additional information on a project or vendor.

Notes Folder

The Notes Folder holds any additional information for a maintenance asset.

Notes Sub-form

Notes Sub-form is a tab located on the lower half of the Employees Form and on the Location Form. This Sub-form holds any additional information on an employee or location. To access this sub-form, click the Notes tab.

Number of Days

Number of Days is an informational field that tells the number of days in that particular billing cycle.

Number of Days to Delivery

Number of Days to Delivery tells how long it will take to receive materials after the vendor receives the order. This number is used by the ACT Purchase Order System to give an approximate date of delivery.

Number of Days to Payment

Number of Days to Payment is the number of days between when the bill was shipped and when it is due. For example, 30 (which equals a month). This number is used by the ACT Purchase Order System to determine due dates of bills.

Number of Occupants

Number of Occupants tells the actual number of occupants currently in the location. This field is designed for locations that are rooms and buildings. For example, a classroom may hold 60 people, but there are only 28 kids and one teacher in the room. The number of occupants is 29.

Odometer Reading

Odometer Reading is a system-required field that is located in the fuel entry table. Enter the number of miles recorded on the odometer of the vehicle. It is important that this reading is accurate because fuel costs and other calculations depend on this number.

Off-Peak kWh

Off-Peak kWh is used to enter the number of kilowatts per hour during off-peak periods. Off-Peak indicates a period of lower use and cost in most cases.

On State Contract

On State Contract is a check box. This box should be clicked on if a state contract exists.

On-Peak kWh

On-Peak kWh is used to enter the number of kilowatts per hour during on-peak periods. On-Peak indicates a period of higher use and cost in most cases.

Organization

Organization is a system-required field that is used to name the organization that will sponsor and/or use the facility. A few examples are PTA, Football Team, and Girl's Basketball Team.

Original Quantity

Original Quantity is the "starting" quantity of an inventory item in the pool. This represents the original number before the quantity adjustment. This number reflects inventory received, issued, and transferred. Requested inventory is not reflected in this number unless it has been issued. To make a change to the Original Quantity, enter the difference (more or less) in Adjustment Quantity or the actual quantity in New Quantity.

Other Charges

Other Charges is located inside the cost table. List any additional costs such as special services here. The amount entered will be added to the Total Cost of the utility transaction.

Other kW

Other kW is used to enter any additional kilowatt measurements that are tracked.

Other kWh

Other kWh is used to track any additional kilowatts per hour measurements.

Pager

Pager represents the employee or contact person’s pager number.

Paid?

Paid? should be clicked on if the costs from the Cost Table have already been paid.

Part of Asset Tag

Part of Asset Tag # can be used when a maintenance asset is a part, or is connected to, another asset. If you want to add, view, or change the asset that it is part of, double click-on the field. An asset must be chosen to view the additional screen.

Path Type

Path Type is chosen when creating the path in the SiteNet Manager. This is an informational field that identifies what type of location the Reference ID is.

Pay Grade

Pay Grade is used to classify or grade salaries. Identify the grade in this field.

Pay Period

Pay Period identifies the employee's pay period. This can be hourly, weekly, or monthly.

Pay Step

Pay Step is used to classify salaries into steps. Identify the step in this field.

Payment Terms

Payment Terms identifies how the vendor should be paid. Make your choice from the drop-down window or double-click inside the field to add new payment terms.

Payment Terms Code

Payment Terms Code is used to associate a location with a type of payment. Payment terms are ways that the location pays the vendor. This should be a concise yet understandable code. When payment terms are accessed, they are alphabetized by the Payment Terms Code.

Payment Terms Days

Payment Terms Days is the number of days between when a bill is shipped and when it is due. For example, 30 (which equals a month). A location can select a payment term that indicates when they typically pay bills.

Personal Information Sub-form

Personal Information Sub-form is located on the lower half of the Employees Form. This Sub-form holds personal employee data. To go to this sub-form simply click the Personal Information tab.

Phone Number

Phone Number holds the telephone number, including area code, of the contact person.

Phone Number

Phone Number, located inside the Contact Table, identifies the telephone number of the vendor, vendor contact, or location.

Pick List Number

Pick List Number is a system-required field that identifies the pick list to be evaluated. When a pick list is created in the Create Pick List Form, you will be notified of the Pick List Number. Open pick lists, which are ones where inventory has not been issued, will appear in the drop-down box. The drop-down box also holds who created the list and when it was created.

Picked By

Picked By is a system-required field that identifies the person who pulled the inventory. If there are any questions about the Pick List or inventory delivery, this individual can be used as a reference. This is a text field.

PM Task ID

PM Task ID is a way to identify the Task List.

PO No. -Line No.

PO No. -Line No. is used identify the purchase that was made for the materials. You can either enter in a purchase number assigned by your accounting department or use the drop-down box to choose a Line No. from the ACT Purchase Order System (if you are using this application).

PO Number

PO Number is used to associate a utility record or item purchase with a Purchase Order # assigned by the purchasing or finance department.

Pool Distribution Table

The Pool Distribution Table contains quantity and location information about an item in a particular pool. Inventory received, issued, and transferred is reflected in the pool quantity. This information can also be set up through the Inventory Adjustment Form.

- Pool ID -lists the pools where the item is located.
- Description -names the Pool ID.
- Aisle -identifies the Aisle in which the item is located.
- Bin -identifies the Bin in which the item is located.
- High -identifies the high level of quantity for the item.
- Low -identifies the low level of quantity for the item.
- Reorder -identifies the ideal amount for reorder. When reordering, the minimum reorder quantity should be considered.
- Quantity -tells the current quantity found in the pool.

Pool ID

Pool ID is a system-required field that provides identification for the inventory pool. The data type is text.

Pool Type

Pool Type is a system-required field. The choices are pre-defined and can be chosen from the drop-down box or entered in by the user. The choices are: Warehouse, Truck, and Other.

Postal Code

Postal Code identifies the zip code for the address of the vendor, employee, or location. There is room to enter the full nine-digit postal code, but it is not required. For example, you can enter 24556-0078 or 24556.

Pounds

Pounds should be clicked on to indicate the use of pounds. You cannot choose Gallons if you choose Pounds.

Primary Trade

Primary Trade should be clicked if the trade chosen is the employee's primary trade.

Print Button

By clicking on the Print Button, the Work Order Print Screen will appear. You can automatically print your work orders from this screen. For more information about printing, refer to “Printing Work Orders.”

Priority

Priority determines a work order's priority. Make your choice through the drop-down box. This field links to an additional information screen, the Work Order Priorities Form, to add or alter current priority information.

Project Description

Project Description describes the project. It is an informational field derived from choice of Project ID.

Project Description

Project Description describes the project. This is a good place to identify the purpose of creating the project. For example, Renovations for Jones Elementary -from fire in Jan. 95. All work upstairs should be given this Project ID.

Project ID

Project ID is used to associate a transaction (work order, utility transaction, facility schedule, inventory, etc.) with a particular project. Make your choice through the drop-down box. This field also links to the Projects Screen, an additional information screen, used to change current project information or add projects.

Project ID

Project ID is the short name for a project. A few examples are GM for General Maintenance and R for Renovations. This identification should be concise yet recognizable. When projects are accessed in drop-down boxes, they are listed alphabetically by Project ID.

Project Lead

Project Lead tells the name of the employee in charge of the project. It is an informational field derived from choice of Project ID.

Project Lead

Project Lead identifies the person or group in charge of the project.

Project Name

Project Name tells the name of the project. It is an informational field derived from choice of Project ID.

Project Name

Project Name is the full name for the Project ID. A few examples are General Maintenance and Renovations. Although the Project ID alphabetizes drop-down boxes containing projects, the Project Name often provides clarity. Be specific.

Purchased Cost

Purchased Cost is an informational field that tells the total cost for purchased items used for the work order.

Purchasing Info

Purchasing Info can only be accessed if you are using the ACT Purchase Order System. This product integrates with ACT 1000 inventory to create a complete purchasing, bidding, and reordering process.

Purpose Code

Purpose Code tells who or why the work order or PM work order is needed. For example, the purpose code of a work order to fix a broken window may be Vandalism. This field links to an additional information screen, the Purpose Code Form, to add or alter current purpose code information.

Purpose Code

Purpose Code is the short name for the maintenance purpose. Some examples are VA for Vandalism and W for Weather-induced work.

Qty in Other Pools

Qty in Other Pools tells the number of items available, excluding the amount in the Suggested Pool. This is an informational field.

Qty in Suggested Pool

Qty in Suggested Pool is the number of items available in the pool identified in Suggested Pool ID. If the suggested pool is changed, the quantity will change accordingly.

Quantity

Quantity tells the amount or number of items associated with the asset, inventory received, requested, or issued, material used for a PM work order, purchased item used, or inventory item used. This is a system-required field.

Quantity Picked

Quantity Picked is a system-required field that tells the number of items pulled for the request. This field defaults to the Quantity to Pick from the Create Pick List Form. This number can be changed to accommodate any unavailable inventory. When the Quantity Picked does not match the intended amount, the request will receive a Material Delay status and will be available in the Inventory Request Form.

Quantity to Pick

Quantity to Pick is an informational field that identifies the number of items to pull from the Pool. This will be the same as Quantity in the Inventory Request Form unless there has been a Material Delay, in which case, the Delivered Quantity plus the Quantity to Pick will equal the total requested amount.

Range

Range prints work orders from a specific Work Order ID to another. For instance, if you choose 10-100: 90 work orders will be printed.

Rate

Rate is an informational field that tells the employee's rate of pay per hour.

Receipt ID

Receipt ID is used to identify the receipt for the key transaction or facility use.

Reference ID

Reference ID is a system-required field that identifies the SiteNet path, or location.

Reference ID

Reference ID identifies the SiteNet path, or location. Each location that is set up in the SiteNet Path Editor will have its own record, identified by Reference ID. The records in the Location Information Form are listed alphabetically by Reference ID.

Region

Region identifies the region of the vendor, location, or employee. This can be a region of the country, state, or district, depending on your preference.

Reports to Account ID

Reports to Account ID should be used if an account is a sub-account of another account. By identifying an account as a sub-account of another account it does not transfer or divide money. For example, if the Jones Budget Account is a sub-account of the Budget Account, money will NOT be subtracted from the Budget Account when it is subtracted from the Jones Budget Account. Instead, this field simply helps to identify accounts.

Reports to Department

Reports to Department identifies the department above the current one, also referred to as the parent department. For example, if the Carpentry Department reports to the Maintenance Department, choose Maintenance Department in this field.

Request ID

Request ID is a blank field that is used to enter the remote identification for facility requests or inventory requests. This ID can be received through the Request Assistant or taken from a number on a paper request. Only numeric values can be used.

Requested Completion Date

Requested Completion Date is the date that the requester wants the work order to be completed. It is an estimate of what is expected. This gives employees a good idea of how much time should be spent on a particular work order. Entry should be in standard date format.

Requested Quantity

Requested Quantity is an informational field taken from Quantity in the Inventory Request Form. This will be the original amount requested unless it was changed before being approved. In cases of Material Delay and partial shipments, the amount delivered is not deducted from the Requested Quantity. This amount is found in the Delivered Quantity field.

Requester

Requester identifies the person who is either entering the request at the remote site or the individual in need of the request. For example, in a request for a broom you can enter the teacher who asked for the broom, or the name of the employee entering the request. Choose a format and follow it consistently.

Requisition

Requisition # is used to associate a utility record with a requisition made to the purchasing or finance department.

Reviewed By

Reviewed By indicates who approved, rejected, voided, etc., the request. Any changes, including Status of the request, are made by this individual. This is a text field.

Roaming Charge

Roaming Charge is located inside the cost table. This field tracks roaming charges for cellular calls. The amount entered will be added to the Total Cost of the utility transaction.

Room

Room is an informational field that identifies the room, or location, that the key has access to.

Schedule BAS?

Schedule BAS? should be clicked to condition the facility for the event. By conditioning a facility, the lights and heating/air will be turned on. By clicking this button, AutoLink will tell your ACT 5100, 6100, or 7100 Building Automation System (or Energy Management System) to prepare the facility. If the changes to your BAS are successful, the status of the schedule will automatically be changed to Complete or Incomplete if a problem occurs. For more information on energy scheduling, refer to the AutoLink manual.

Schedule ID

Schedule ID is unique field that is populated by ACT 1000 to identify the schedule.

Schedule Information Screen

Schedule Information Screen holds basic scheduling information. The Facility Scheduling form is defaulted to show this screen. To move to Activity Information click on the tab.

Select All

Select All allows you to select all requests on the Pick List. Keep in mind that all requests on the form have been Approved with at least partial delivery available.

Serial Number

Serial Number identifies the serial number of the maintenance asset.

Service Type

Service Type tracks the type of telephone service for a specific account, such as: Long Distance, Local, Cellular, and Combination.

Show Transfer History

By clicking on Show Transfer History, a screen appears that gives the history of any transfers for that particular item. This screen is located on the Inventory Received Form and appears on top of the Transfer To and Transfer From screens. The history screen holds the following information on each transfer:

- Date (of Transfer)
- Inventory Type
- Item ID
- Transferred From
- Transferred To
- Quantity
- Unit of Issue

To move to the original Transfer Form, click Hide Transfer History.

Site Account

Site Account is an informational field that identifies the account for a specific site. Some users will use site accounts in addition to basic budget accounts identified in Issued To. Entering a site account provides accountability without any money being transferred. This is a text field.

Social Security

Social Security # identifies the nine digit Social Security number for the employee. Dashes are automatically in place after the third and fifth number. You cannot enter more than nine numbers. For example: 243-66-7896.

Sponsored?

Sponsored? should be clicked on if the facility schedule is sponsored by the organization.

Spouse’s Name

Spouse's Name is the name of the employee's spouse.

Square Footage

Square Footage identifies the size of the location. For example, the Square Footage for the Cafeteria is 2800 (square feet).

Standard Response Period

Standard Response Period is used to identify the length of time associated with that particular priority level.

Start Date

Start Date is located inside the PM, CM, and Total Work Order History windows. This is an informational field that lists the Start Date with each completed Work Order for that PM task.

Start Time

Start Time identifies the time that the facility needs to be available for use. This is a system-required field and is entered in military format. Fractions of hours should be entered in minutes. For example, 3:30 means thirty minutes past the hour and not 1/3 of an hour.

State

State identifies the state for the address of the vendor, employee, or location. It is suggested to use the two-digit code for the state. For example: NC, NY, and TX.

State Assigned Code

State Assigned Code is a unique identification assigned to a location by the State. Some states require specific types of rooms or buildings, such as auditoriums and gyms, to be identified on a state level.

Status (Facility Schedule)

Status indicates the status or condition of the facility schedule. The choices from the drop-down box are explained below:

- Submitted -Remote requests are automatically received with a Submitted status unless they are approved through the ACT Request Assistant.
- Approved -This status will allow schedules to be saved on the facility calendar. After making additional scheduling selections from the Facility Scheduling Calendar go back to each record and approve its use.

  Note: If a record is not approved, another record can be scheduled in the same facility at the same time.
- Complete -The status will automatically be changed to Complete when AutoLink successfully enables the ACT Energy System to condition the facility before the event. For this to occur, the Schedule BAS? check box must be clicked and the status must be marked Approved beforehand. Complete can also be chosen manually to track energy management.
- Incomplete -The status will automatically be changed to Incomplete when AutoLink has a problem enabling the ACT Energy System before the event. For this to occur, the Schedule BAS? check box must be clicked and the status must be marked Approved beforehand. The ACT Energy System will attempt to enable itself at five-minute intervals if there are any problems and a schedule has a status of Incomplete. Incomplete can also be chosen manually to track energy management problems.
- Rejected -Used to dismiss the facility schedule but still save the record.
- Void -Used to indicate a facility schedule that will not be used, but is still saved.

Status (Inventory Request)

Status indicates the state of the inventory request. Incoming requests have a Submitted status. To approve the request click the A to the left of the field, type in Approved or make your choice through the drop-down box. Explanation of Status choices:

- Submitted -Indicates incoming and new requests. Inventory is not reserved for submitted requests.
- Approved -Signifies that the request is authorized and that at least a partial shipment is available. Whenever the status of a request is changed to Approved, whether from Submitted, Material Delay, or Rejected, Inventory is automatically committed or "held." If any inventory is available, the request will be sent to the Create Pick List Form. All of the requests for a specific item will be updated by changing a Material Delay to Approved. **Hint: Click the A to the left of the requests to quickly approve requests.
- Material Delay -Indicates an approved request with no available inventory. You cannot choose Material Delay; it can only be assigned. A Material Delay request can either be new, meaning it has never been approved and sent to the Create Pick List Form, or it may be returning to the Inventory Request Form after a partial delivery. The partial delivery is marked as complete and the remaining quantity waits for incoming or transferred inventory. To check for new inventory you can try to change the status of the Material Delay to Approved. If any inventory is available it will be approved and move to the Create Pick List Form.
- Incomplete -Indicates an approved request, selected in the Create Pick List Form, waiting to be delivered and issued. Inventory for an Incomplete request is reserved.
- Complete -Used when partial deliveries are made and the request needs to be closed out. For example, 10 items were requested and nine were delivered. Instead of waiting for the single item, someone decides nine is good enough. Mark the request as Complete and the request will be taken out of the "loop" to receive the last item.
- Rejected -Chosen when a request is denied. Rejected requests are not deleted from the Inventory Request Form.
- Void -Indicates an invalid request. If you enter incorrect information, choose Void. If inventory is chosen, it will not be committed when the request is voided. Voided requests are not deleted form the Inventory Request form.

- Duplicate -Occurs when a remote site sends the same request more than once. If you notice a request for the same items at the same location, chances are that it is repeated. Occasionally remote sites will forget they have made a request or will send additional requests in hopes of hurrying things up. You cannot assign a Duplicate status to requests that have issued inventory.

Status (Work Order)

Status is a system-required field that indicates the current status of the work order. Some of the fields in the Work Order Form can only be accessed when a work order is complete. After approved work orders are printed out, it is important to go back and change the status to complete or material delay.

Work orders received from remote sites using SiteNet Maintenance Management RequestLINE or ACT Request Assistant are automatically given a Submitted status.

The choices of status, which are found in the drop-down box, are listed and explained below:

- Approved -Approved work orders eventually are completed (ideally). Approved work orders should be printed out. Once an approved work order is printed, the status changes to Incomplete.
- Complete -This status indicates a finished work order. All totals are accurate and no additions will be made.
- Duplicate -A work order should be marked as Duplicate if more than one work order is received for the same job. The user must notice (find) any duplicate work orders. A duplicate work order is void.
- Incomplete -After approved work orders are printed, they become incomplete. They remain incomplete until the work is finished (complete) or a delay in materials occurs (material delay).
- Material Delay -When inventory items or purchases are not available to be used for a work order, it should be marked as Material Delay. Work orders on material delay are approved and should eventually be completed.
- Rejected -Work orders or work requests that will not be processed are marked as Rejected. This status is the opposite of Approved. When work orders are rejected, they become null.
- Submitted -When work orders are initially entered or received, they will have the submitted status. In most cases, through

evaluation, a work order will either be approved or rejected after it is submitted.

- Void -Voided work orders are "mistakes." If there were any problems entering the work order, it should be Voided. Void work orders will not be completed; they are null.

Stock Item

Stock Item should be clicked on if the item is stocked.

Suggested Pool ID

Suggested Pool ID is defaulted to the Pool chosen for that type of inventory in the Inventory Pool Form. To change the default, click inside the box and the form will appear. If the inventory will be pulled from a different pool than the one listed, simply make your choice through the drop-down box.

Supervisor Name

Supervisor Name tells the name of the employee’s supervisor. It is an informational field derived from choice of Employee ID.

Supervisor Name

Supervisor Name identifies the name of the employee's direct supervisor.

Vendor

Vendor is located inside the main folder. It identifies the vendor of the maintenance asset. This field also links to an additional information screen, the Vendor Form, to add or change current vendor information.

Vendor Contact Name

Vendor Contact Name, located inside the Contact Table, identifies the name of the vendor contact.

Vendor ID

Vendor ID identifies the vendor. This is a system-required field. Make your choice through the drop-down box. This field also links to an additional information screen: the Vendor Form. To enter additional Vendor information or alter current information, go to this screen.

Vendor ID

Vendor ID identifies the vendor. This identification is used to look up vendors for inventory items, preventive maintenance items, and maintenance assets. Create Vendor IDs that are easily recognizable or memorable.

Vendor Item ID

The Vendor Item ID is the identification number from the Vendor. This is good to keep up with, especially for reordering purposes.

Vendor Name

Vendor Name is name of the vendor. This is an informational field derived from the choice of Vendor ID.

Vendor Name

Vendor Name is the name of the vendor identified in Vendor ID. Although the Vendor ID is normally entered when choosing a vendor, the Vendor Name is found in drop-down boxes to help locate vendors.

Vendor Type

Vendor Type is used to categorize vendors. For example, ST for Standard Vendors.

Surcharge

Surcharge is located inside the cost table. This field tracks additional toll charges. The amount entered will be added to the Total Cost of the utility transaction.

Surcharge

Surcharge is used to document any extra charges from the vendor. For instance, some vendors have a surcharge if you order below the minimum amount.

Task (Inspections)

Task is a system-required field located in the Inspections window, which identifies the object/s being scheduled. Make your choice from the drop-down box. This field also links to an additional screen, the Tasks Form. To enter additional task information or alter current information, go to this screen.

Task (PM Schedule)

Task is an informational field derived from the PM Schedules Form. This field identifies the PM Schedule that is being maintained.

Task List (Inspections)

Task List is the second of the four sub-screens that appear at the bottom of the Inspections Information Form. The sub-screens are defaulted to Work Order Info, and the Task List can be accessed by clicking the button marked Task List. This is an informational field derived from the PM Task Form, which provides the directions, or list of tasks, for your inspection.

Task List (PM Schedule)

Task List is an area to enter the tasks, or "directions," to perform the PM inspection. Task List is a memo field and the data type is text.

Taxes

Taxes is located inside the cost table. This field tracks any additional taxes charged. The amount entered will be added to the Total Cost of the utility transaction.

Therms

Therms should be clicked if the gas in measured in Therms, an energy measurement.

Time and Cost Table

The Time and Cost Table contains all information concerning the cost and time for the facility's use. There are six different types of costs:

- Facility Fee
- System Security
- Professional Supervision
- Equipment Operator
- Classified Supervision
- Other

With each of these types of costs, there is a Time and Cost field that tells the length of time and amount paid for that time. At the bottom of the table is a computer-generated Total row that holds the total time and costs for all cost types.

Title

Title is an informational field that tells the title of the employee chosen in Employee ID.

Title

Title identifies the employee or vendor contact's job title, or position. Some examples are Operations Manager and Computer Technician.

Tolerance Level

Tolerance Level is a system-required field. It should be filled in with the percentage tolerated for an item issued below 0. You may choose 0.00% if you do want to issue any items past the available amount. This is a beneficial feature, especially when items are on order.

Tons per Day

Tons per Day is an informational field that calculates the average amount of coal used each day.

Tons Used

Tons Used is a system-required field that tracks the tons of coal used. The data type is a number.

Total (Inventory)

Total tracks the total cost for issuing a particular inventory item, which is the Quantity multiplied by the Amount Charged. This is an informational field.

Total (Labor Transactions)

Total is an informational field that tells the employee's total labor cost for the line item of the work order. This amount is calculated by multiplying the Rate by the Hours.

Total (Purchased Transactions)

Total is an informational field that calculates the total cost of purchased materials by multiplying the Amount Paid by the Quantity.

Total (Vehicle Fuel Usage)

Total is an informational field that tells the total travel cost for the vehicle. This number is calculated by multiplying the number of Miles or Hours by the Rate.

Total (Work Order)

Total is an informational field that tells the employee's total labor cost for the line item of the work order. This amount is calculated by multiplying the Rate by the Hours.

Total Cost (Utility Analysis)

Total Cost is an informational field that calculates the total cost of a utility bill, derived from information in the cost table.

Total Cost (Vehicle Fuel Usage)

Total Cost is the total cost of the fill-up, including any additional costs. This field is informational, requiring no data entry.

Total Cost (Work Order)

Total Cost is an informational field that totals all the costs for the work order including Labor, Inventory, Purchased, and Vehicle costs.

Total kWh

Total kWh is a system-required field that is used to track the total kilowatts per hour during the billing cycle. In most cases, the three measurements: On-Peak, Off-Peak, and Other should add up to this amount. The data type is a number.

Total Minutes

Total Minutes is a system-required field that holds the total number of minutes of telephone use. This number should be located on your bill, and the data type is a number.

Total Quantity

Total Quantity is an informational field derived from the Inventory Pools.

Total Value

Total Value is an informational field that tells the total value of the inventory item.

Trade Code

Trade Code is a system-required field that identifies the type of trade for the employee or PM work order. This field also links to an additional information screen, the Trade Codes Form, to add or alter current trade code information.

Trade Code

Trade Code is the short name for a trade code. Each employee must be assigned at least one trade. Choose trades that the employee has training in or is qualified to work in. Some examples are CA for Carpentry, PL for Plumbing and CR for Computer Repair.

Trades Sub-form

Trades Sub-form is located on the bottom-half of the Employees Form and lists the employee's trades. To access this sub-form, click the Trades tab.

Transaction Buttons

Located on the bottom of the Work Order Form are six buttons. These buttons can be accessed after a record has been saved. The screen is defaulted to the Main Sub-form, or screen, and the remaining sub-forms can be accessed after the work order is saved:

- Labor -Labor Transactions for the work order
- Inventory Issued -Inventory Transactions for the work order
- Purchased -Purchased Transactions for the work order
- Vehicle Travel -Vehicle Travel Transactions for the work order
- Totals -Total costs and time for the work order

Transaction Total

Transaction Total is an informational field that tells the total amount for the transfer.

Transfer

Transfer activates the transfer of an item from one Inventory Pool to another. This button can only be accessed after the Transfer To and

From Pools have been selected. Before clicking on Transfer, be sure you have selected transfer quantity, unit of issue, and the correct pools.

Transfer From

Transfer From is a screen that tells where an item is located and the quantity at each location. After choosing an item, this screen should list all Pools where the item is found. The screen contains a table that holds the following information for each item:

- Pool ID
- Description (of Pool)
- Quantity
- Aisle
- Bin

Click-on the Pool you would like to transfer the item from. When you do this, you will notice that the Transfer To screen and buttons between the screens comes out.

Transfer Quantity

Transfer Quantity is the number of items to be transferred.

Transfer To

Transfer To is a screen that lists all possible Pools that an item can be transferred to. These will appear after a Pool has been selected from the Transfer From screen. The screen contains a table that holds the following information for possible Pool:

- Pool ID
- Description (of Pool)
- Quantity
- Aisle
- Bin

To finish the Transfer process, complete the fields located between the Transfer screens and click-on Transfer.

Transportation Charges

Transportation Charges is located inside the cost table. This field tracks any charges for transportation of the gas or coal. The amount entered will be added to the Total Cost of the utility transaction.

Travel Cost

Travel Cost is an informational field that tells the total vehicle cost for the work order.

Type

Type is a way to categorize assets and masters. It is the second, or middle, category. For example, in the categories, 1) Hand Tools, 2) Electric Drills, 3) Black and Decker 4110: the Type is Electric Drills. Make your choice from the drop-down box. This field also has access to an additional information screen, the Asset Categories Form, to add or change current asset Types.

Type of Hazard

Type of Hazard identifies what type of hazard is found in the location. An example is AS for Asbestos.

Unit

Unit is an informational field derived from the PM Tasks Form. This field, which is located in the Inspections window, tells the unit of the last Work Order ID for that particular task.

Unit Cost

Unit Cost tells the average cost per item for an inventory item. This amount can be changed easily. Changes in Unit Cost can be tracked through the History Sub-form of the Inventory Form.

Unit of Issue

Unit of Issue is a system-required field that identifies the unit of measurement that an item comes in and/or is issued in. The choices are pre-defined and can be chosen from the drop-down box or entered in by the user. The units vary from inches, days, pounds, and teaspoons.

Unit of Receipt

Unit of Receipt is a system-required field in which the user names the unit of measurement that an item comes in and/or is issued in. The choices are pre-defined and can be chosen from the drop-down box or entered in by the user. The units vary from inches, days, pounds, and teaspoons.

Unit Price

Unit Price is an informational field that tells the amount charged for a single item issued. This is derived from the Unit Price set up in the Inventory Form. The amount will be the same as the average Unit Cost unless the Unit Price is changed in the Inventory Form.

Unit Type

Unit Type is used to tell the type of "number" in the field to the left to determine the life expectancy of an asset. Choose from the following choices in the drop-down box:

- Years
- Months
- Weeks
- Days
- Hours

Units b/t Fill-ups

Units b/t Fill-ups is an informational field derived from Maintenance Assets. This shows the expected number of units, which could be anything from miles, hours, or days, between fill-ups.

Units per Day

Units per Day is an informational field that calculates the average gallons, pounds, CCFs, Therms, or Kilojoules (depending on which one you are using) of gas per day.

Units Used

Units Used is a system-required field used to enter the number of gallons, pounds, CCFs, or Therms of gas used. This number can be entered in whole or decimal form.

Utility Type

Utility Type is a system-required field that lets you choose the type of utility for the meter or account. You can make your choice from the drop-down box, or enter in one of the designated choices listed below:

- Electricity
- LP Gas
- Natural Gas

- Coal
- Telephone
- Water
- Sewer
- Garbage
- Cable TV
- Information Services
- Recycling

Vehicle

Vehicle is a check box to be clicked when the maintenance asset is a vehicle. If the asset is a vehicle, it is important to click the box because an additional Vehicle Data folder will be added to the screen.

Vehicle Data Folder

The Vehicle Data Folder is only available if the maintenance asset is a vehicle. In other words, Vehicle must be clicked on. This holds information specific to vehicles.

Vehicle Name

Vehicle Name is an informational field that describes the vehicle or Asset Tag #.

View Calendar

View Calendar is an option that provides a visual picture of schedules. This calendar also has the capacity to make identical schedules with separate Facility Scheduling ID's for different dates. For more information on the Calendar, refer to Facility Scheduling Calendar

View/Hide Vendor Contact button

View/Hide Vendor Contact allows is used to view and enter information for vendor contacts. By default, the Vendor Contact Table is not shown and the button must be clicked in order to view the information. Once the table is shown, click Hide Vendor Contacts to return to the normal screen. This table, which is located at the bottom of the Vendors Form, is used to track vendor contacts. When vendors need to be reached when items are defective, late, or questions arise, this information is very valuable. This table can contain more than one individual per vendor.

Void

Void is a check box that can be used to cancel the entire utility transaction. Once it has been clicked, a screen will appear to make sure you want to delete the record. If you choose Yes, you can fill out the reason for voiding. You can close the screen after this explanation has been entered, and the record will be deleted.

Warranty Exp. Date

Warranty Exp. Date tells the last date of warranty for a maintenance asset.

Warranty Exp. Mileage

Warranty Exp. Mileage tells the maximum number of miles a vehicle is under warranty for. Whole or decimal numbers can be entered, but will be rounded to the closest whole number.

Way

Way identifies the stock number of the key blank for a specific key.

Weekly Scheduling

The Inspections Scheduling Box is defaulted to Specific Weeks. By Scheduling PM work orders by week, select the weeks and the date will automatically appear. The data type is a number, but if you enter a decimal number, the number will be rounded to the nearest whole number. At the bottom of the screen is a box marked Interval Scheduling. To schedule PM work orders through intervals instead of weeks, click-on this button.

WO Complete?

WO Complete? indicates if the work order is complete. By clicking the button, the status of the work order will change to Complete. This cannot be undone except through the Work Order Form.

Work Date

Work Date tells the date that the employee worked on the work order. The date is defaulted to the current date, but can easily be changed using standard date format.

Work Order History

Work Order History is a common name for three of the four windows located at the bottom of the PM Schedules Form. These windows can be accessed by clicking on one of the following Work Order History buttons:

- Preventive Maintenance Work Order History: Provides a history of PM Work Orders for that particular task.
- Corrective Maintenance Work Order History: Provides a history of CM Work Orders for that particular task.
- Total Work Order History: Provides a combined history of maintenance work orders, both PM and CM, for a particular task.

Work Order ID

Work Order ID is an informational field given after a work order, PM work order, or facility schedule has been generated. A facility schedule must be saved and approved before generating a work order. It is also used to associate inventory with a specific work order.

Work Order Info

Work Order Info is one of the four sub-screens that appear at the bottom of the Inspections Information Form. The sub-screens are defaulted to Work Order Info, which contains the information to create a work order for the PM Schedule. If you move to one of the sub-screens, you can return by clicking on the button marked Work Order Info.

Work Request ID

Work Request ID is used to enter the remote identification. If you are using written requests, enter the request # here. Request IDs will be given to work orders that are received from SiteNet Maintenance Management RequestLINE. The Work Request ID must be a number.

Works with Grand Master?

Works with Grand Master? should be clicked if the Grand Master key can open the lock(s) that the key opens. Grand Master keys can open multiple locks.

Year

Year identifies the model year of the car. It can be entered in standard date format.