

REACTION PHYSICAL PLANT MODULE USER MENU

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WORK ORDER

ADD WORK ORDER:

1. Logon to [Reaction](#)
2. Go to **Physical Plant** → **Add Work Order**. Or [Click Here](#)
3. Enter or Select the following required information(see figure 1):
 - Net ID***
 - Short Description***
 - Work Needed***
 - Building***
 - Work Type***
4. Enter or Select optional fields (see figure 1).
5. Click **Submit**
6. A confirmation page will be displayed (see figure 2).

PHYSICAL PLANT - CREATE WORK ORDER

Category*	Maintenance	*	<input type="checkbox"/> Emergency	<input type="checkbox"/> Request Quote
NetID:	dambache	*	* Search Net ID from Phonebook	
Short Description (22 char max):	check window AC	*		
Work Needed:	Windows AC not working			
Building:	Noyes Lab	*		
Room No:	53			
Room Type:	Lab			
Work Type:	Normal	*		
Contact Name/Phone:	Chad Stevens 3-6365			
<input type="button" value="Submit"/>				

Figure 1: Add Work Order Screen

PHYSICAL PLANT WORK ORDER

The Following Work order created successful

View / Add Comments	View / Add F&S Charge
Work Order #:	802
NetID:	dambache
Category	Maintenance
Emergency Request:	No
Request Quote:	No
Short Description:	check window AC
Work Needed:	Window AC not working
Building / Room No:	Noyes Lab 53
Room Type:	Lab
Work Type:	Normal
Contact:	Chad Stevens 3-6365
Status:	Requested

Add Single Cfopa Split Cost

Figure 2: Add Work Order Confirmation Screen

SEARCH WORK ORDER:

1. Logon to [Reaction](#)
2. Go to **Physical Plant** → **Search Work Order**. Or [Click Here](#)
3. Provide one or more of the following:
 - Work Order #**
 - Net ID**
 - Short Description**
 - Work Needed**
 - Category**
 - Building**
 - Requested By**
 - PI Net ID**
 - Status**
 - SCS Cfopa or Alias**
 - User Cfopa or Alias**
 - Date Range** (request date or completed date)Check other options available at the bottom of the screen

4. Click **Submit** (see figure 3)
5. Update / Delete, View / Add Comments and Quotes are available on result page(see figure 4)

PHYSICAL PLANT SEARCH WORK ORDER

SCS Work Order #:

Net ID:

Short Description:

Work Needed:

Category:

Building:

Requested By:

PI Net ID:

Status:

-----USER CFOPA-----

C	F	O	P	A
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

OR Alias:

-----DATE RANGE (MM/DD/YYYY)-----

Request Date: From To

Submit Date: From To

- Check this box if you want to list ONLY **emergency** items
- Check this box if you want to list ONLY **requested quote** items
- Check this box if you want to list ONLY jobs with an **incomplete cfopa**
- Check this box if you want to list ONLY items that **do not have pi approval**
- Check this box if you want to list ONLY **open jobs**
- Check this box if you want to list ONLY items **not billed**

Figure 3: Search Work Order Screen

	WO #	F&S	WO #	Description	Date	NET ID	SCS	Cfopa	Emergency	Request Quote	Completed				
	504	9970529		mnthly A/C maintenance	12/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	503	9970494		A/C maintenance	12/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	502	9970319		service A/C unit	12/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	501	9970284		clean humidificatn pan	12/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	500	9969824		clean chiller unit	12/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	499	9966993		test backflow preventr	12/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	498	9966992		test backflow preventr	12/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	497	9966991		test backflow preventr	12/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	496	4523996		remv floor tile	12/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	495	4522622		rplc condenser contact	12/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	494	4522104		install control relay	12/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	484	4515901		assemble furniture	12/7/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	482	9969379		bi-annual AC check	11/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	
	481	9968756		mnthly NMR compressor	11/15/10	kcagle	1 301369 510000 510063	510000	No	No	No	View/Add Charges	View/Add Comments	View Banner	

Figure 4: Search Work Order Result Screen

PHYSICAL PLANT - UPDATE WORK ORDER

Back

View / Add Comments View / Add F&S Charge

SCS Work order #: **802**
 NetID: dambache
 Requested by: CHERYL KAPPES
 Status: Requested
 Statement Description: check window AC

-----THE FOLLOWING INFO CAN BE UPDATED-----

Category:

Maintenance * Request Quote Emergency

Work Needed:

Window AC not working *

Building:

Noyes Lab *

Room No:

53

Room Type:

Lab

Work Type:

Normal *

Contact Name/Phone:



Chad Stevens 3-6365

Update

Add Single Cfopa Split Cost


Figure 5: Update Work Order Screen

UPDATE / DELETE WORK ORDER


1. Logon to [Reaction](#)
2. Go to **Physical Plant** → **Search Work Order**. Or [Click Here](#)
3. Follow instructions on how to search work order. If work order id is known, enter the id number. Click Submit.
4. On search result page, Click  or  (**Delete**) link to update or delete the work order (see figure 5). For deleting, if the work order has cfopa, quote, comments or charges (not available for end users) attached, those attached items have to be deleted first before the work order can be deleted.

CFOPA

ADD CFOPA

1. Logon to [Reaction](#)
2. Go to **Physical Plant** → **Search Work Order**. Or [Click Here](#)
3. Follow instructions on how to search work order. If work order id is known, enter the id number. Click Submit.
4. On search result page, click  link.
5. On update work order page, **Click Add Single Cfopa** or **Split Cost**. Single cfopa will cover 100 % of the cost. Split Cost will provide the option of splitting by percentage or dollar amount (see figure 7, 7a and 8 for screen). Add cfopa links also available on add / update work order confirmation page.

UPDATE CFOPA % COVERAGE OR DOLLAR AMOUNT

1. Logon to [Reaction](#)
2. Go to **Physical Plant** → **Search Work Order**. Or [Click Here](#)
3. Follow instructions on how to search work order. If work order id is known, enter the id number. Click Submit.
4. On search result page, click  link.
5. If there are active cfopas attached to a work order, the % and \$ splitting amount can be modified. However, for % splitting, it has to cover 100% of the cost in total. For dollar amount splitting, an overage account is mandatory (see figure 9).
6. Update link is also available on create / update work order confirmation page.

PHYSICAL PLANT - ADD A WORK ORDER CFOPA COVER 100% COST

[Back to Search](#)

Cfopa: C F O P A

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	* Validate
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Or Alias: *

Effective Date: *

Figure 7: Add Single Cfopa Screen

PHYSICAL PLANT WORK ORDER

[View / Add Comments](#)

[View / Add F&S Charge](#)

Work Order #:

802

NetID:

dambache

Category

Maintenance

Emergency Request:

No

Request Quote:

No

Short Description:

check window AC

Work Needed:

Window AC not working

Building / Room No:

Noyes Lab 53

Room Type:

Lab

Work Type:

Normal

Contact:

Chad Stevens 3-6365

Status:

CfopaCompleted

Added Cfopas:

Cfopa	PI	Split By	Active Status	Active Date	End Date	Approved By	Approved On
1- 301045- 510008- 510045	VERA MAINZ	100%	Yes	2/22/11			
Update Percentage	Replace this cfopa	Delete					

Figure 7a: Add Single Cfopa Confirmation Screen

PHYSICAL PLANT - SPLIT WORK ORDER COST

Back to Search

Cfopa: C F O P A

* **Validate**

Or Alias: *

Split By Percentage \$Amount


Percentage : *

OR \$Amount: *

Effective Date: *

Figure 8: Split Cfopa Screen

REPLACE / DELETE / RE-ACTIVATE CFOPA AND OVERAGE ACCOUNT

1. Logon to [Reaction](#)
2. Go to **Physical Plant** → **Search Work Order**. Or [Click Here](#)
3. Follow instructions on how to search work order. If work order id is known, enter the id number. **Click Submit**.
4. On search result page, click  link.
5. Active cfopas can be deleted /replaced from the update work order page. **Replace** cfopa will mark the existing cfopa inactive and add a new cfopa with everything the same but require pi approval and today's date as effective date. **Delete** cfopa only marks the cfopa inactive and will not remove the record permanently. Deleted cfopas can also be **Re-activated**.
6. For each delete and reactivate, the % coverage and dollar amount splitting will be re-evaluated to make sure the entire cost is covered.
7. **Overage Account** can be switched between the cfopas set up for the work order. By doing that, cost over the specified \$ amount limit will be charge to this account (see figure 10).
8. Replace / Delete / Re-Activate links are also available on create / update work order confirmation page.

PHYSICAL PLANT - REPLACE CFOPA

[Back to Search](#)

Cfopa: C F O P A

<input type="text" value="1"/>	<input type="text" value="301045"/>	<input type="text" value="510008"/>	<input type="text" value="510045"/>	<input type="text"/>
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* **Validate**

Or Alias: *

Effective Date: *

Figure 9: Replace Cfopa Screen

PHYSICAL PLANT - UPDATE PERCENTAGE OR \$AMOUNT

[Back to Search](#)

Cfopa: C F O P A

<input type="text" value="1"/>	<input type="text" value="301045"/>	<input type="text" value="510008"/>	<input type="text" value="510045"/>	<input type="text"/>
--------------------------------	-------------------------------------	-------------------------------------	-------------------------------------	----------------------

Alias:

Split By Percentage \$Amount

Enter Percentage: *

Figure 10: Update Cfopa Screen

VIEW / ADD F&S CHARGES (ONLY AVAILABLE TO MANAGERS)

1. Logon to [Reaction](#)
2. Go to **Physical Plant** → **Search Work Order**. Or [Click Here](#)
3. Follow instructions on how to search work order. If work order id is known, enter the id number. **Click Submit**.
4. On search result page, **Click View / Add F&S Charge**.
5. Previous bills will be displayed. **Add F&S Charge** link is located at the bottom of the page (see figure 11 and 12).
6. If charges not billed yet, it can be updated.
7. The link is also available on update work order page.

PHYSICAL PLANT - VIEW F&S BILLS

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SCS Billing ID	SCS WO#	F&S Job#	Accounting Period	Cfopa Charged	Labor Charge	Material Charge	Total Charge
546	504	9970529	11/27/10	1 301369 510000 510063	\$309.62	\$0.00	\$309.62

Add F&S Charge

Figure 11: View / Add F&S Charges Screen

PHYSICAL PLANT - CREATE FACILITY AND SERVICES BILLING

SCS Work Order #: 802

FS Work Order #: *

Cfopa: C F O P A * **Validate**

Or Alias: *

Accounting Period: *

Labor Cost:

Material Cost:

Figure 12: Add F&S Charges Screen

View / Add Quotes

1. Logon to [Reaction](#)
2. Go to **Physical Plant** → **Search Work Order**. Or [Click Here](#)
3. Follow instructions on how to search work order. If work order id is known, enter the id number. **Click Submit**.
4. If the work order indicated quote is required, **View / Add Quote** link will be available on search result page.
5. **Click View / Add Quote**, previous quotes will be displayed. **Add Quote** link is located at the bottom of the page (see figure 13 and 14).
6. Quote can be approved, rejected or requesting for re-submit. It can also be removed.
7. **Email Notification** may be sent between physical plant manager and user until either the quote accepted or rejected. If accepted, the work order will move forward. Otherwise, it will end there.
8. The link is also available on update work order page

PHYSICAL PLANT - VIEW WORK ORDER QUOTES

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Work Order #: 802

(Company Name) submitted on 02/22/2011

Status: QuoteSubmitted

This is a quote

Approve

Reject

Re-Submit

Delete

Figure 13: Add / View Quote Screen

PHYSICAL PLANT - CREATE QUOTE

SCS Work Order #: 802

Enter Comments Detail:

Name of Company:

*

Upload a File:

Browse...

Submit

Figure 14: Add Quote Screen

View / Add Comments

1. Logon to [Reaction](#)
2. Go to **Physical Plant** → **Search Work Order**. Or [Click Here](#)
3. Follow instructions on how to search work order. If work order id is known, enter the id number. Click Submit.
4. If the work order indicated quote is required, **View / Add Comments** link will be available on search result page.
5. **Click View / Add Comments**, previous comments will be displayed. Add comments link is located at the bottom of the page (see figure 15 and 16).

[Back](#)

Work Order #: **802**

Date Submitted: 02/22/2011

this is a comment

[Add Comments](#)

Figure 15: View / Add Comments Screen

PHYSICAL PLANT - CREATE COMMENTS

SCS Work Order #: 802

Enter Comments Detail Below:

*

Check this box if you **want to** send an email to requester

Submit

Figure 16: Add Comments Screen