

*AVANTIS.PRO*

**Creating a Work Order**  
**University Of Western Ontario**



# Create WO – Step 1

The screenshot shows the 'Avantis Asset Management' software interface. The title bar reads '\*UWO Caretaking Supervisor/Lead - Avantis Asset Management'. Below the title bar are three tabs: 'Search', 'Create', and 'Reports'. The 'Create' tab is active, displaying a list of options with checkboxes:

- Create Work Order
- Create M ACFM
- Create Maint CARPTR
- Create Maint CONTROLS
- Create Maint E/M
- Create Maint ELECT
- Create Maint GROUNDS
- Create Maint LOCK
- Create Maint P/F
- Create Maint PAINT
- Create Maint VEHICLE
- Create Maint WES

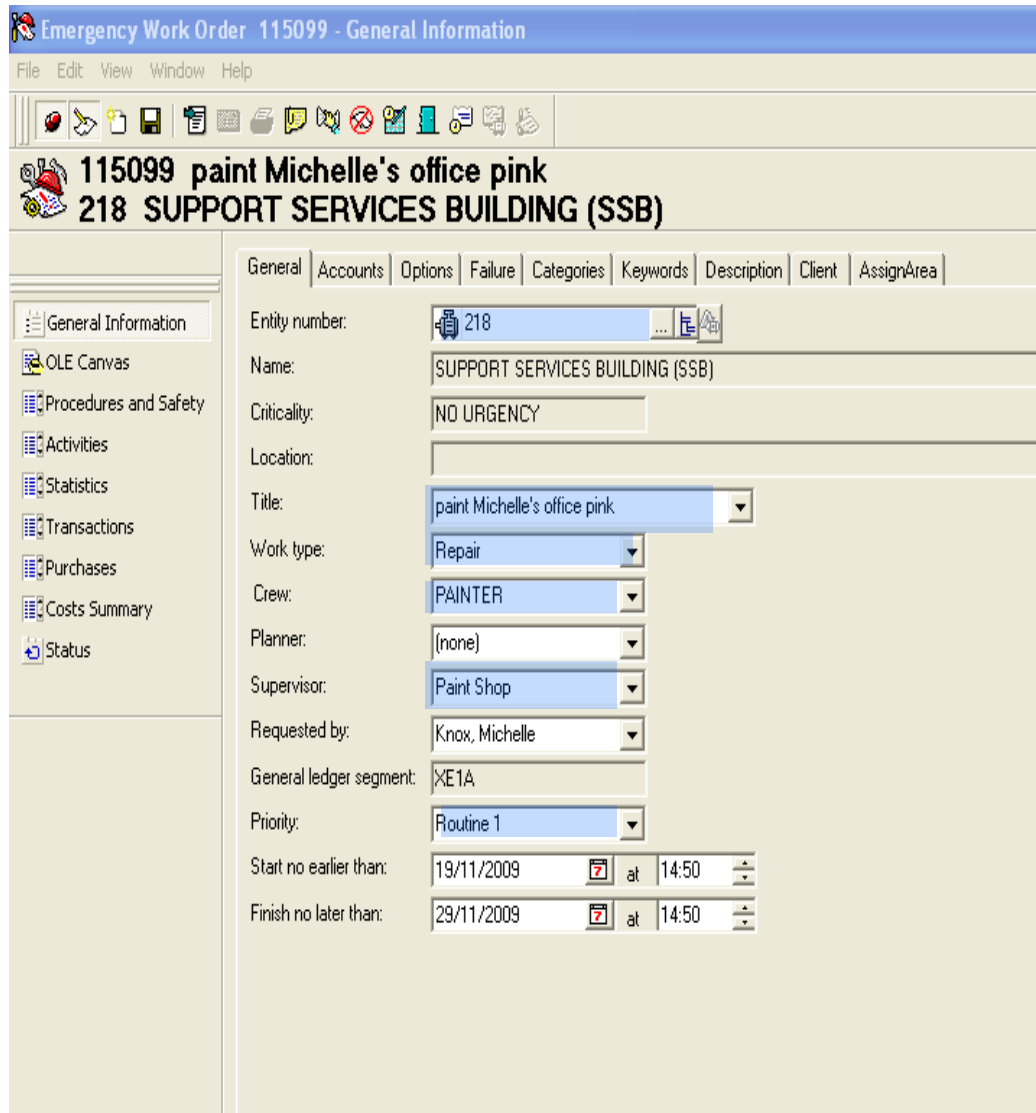
A dialog box titled 'Create New Emergency Work Order' is open in the foreground. It contains the following fields and controls:

- 'Create in PPD' label
- 'New number:' text box containing '115099'
- 'Template to use:' dropdown menu showing 'Maintenance Paint'
- 'OK' button
- 'Cancel' button

## Create

- select the appropriate template
- double click or press enter
- a work order number is assigned

# Create WO – Step 2



Emergency Work Order 115099 - General Information

File Edit View Window Help

115099 paint Michelle's office pink  
218 SUPPORT SERVICES BUILDING (SSB)

General Accounts Options Failure Categories Keywords Description Client AssignArea

Entity number: 218

Name: SUPPORT SERVICES BUILDING (SSB)

Criticality: NO URGENCY

Location:

Title: paint Michelle's office pink

Work type: Repair

Crew: PAINTER

Planner: (none)

Supervisor: Paint Shop

Requested by: Knox, Michelle

General ledger segment: XE1A

Priority: Routine 1

Start no earlier than: 19/11/2009 at 14:50

Finish no later than: 29/11/2009 at 14:50

## General

### Complete the following:

- Entity number (building number)
- Title (work to be completed)
- Work Type (change if required)
- Crew (trade)
- Supervisor
- Priority

# Create WO – Step 3

The screenshot shows a software window titled "Emergency Work Order 115099 - General Information". The window has a menu bar (File, Edit, View, Window, Help) and a toolbar with various icons. The main content area displays the work order details: "115099 paint Michelle's office pink" and "218 SUPPORT SERVICES BUILDING (SSB)". Below this, there are several tabs: "General", "Accounts", "Options", "Failure", "Categories", "Keywords", "Description", "Client", and "AssignArea". The "Accounts" tab is selected, showing a "General ledger segment:" section with a "Number:" field containing "XE1A". Below this, a table titled "Accounts that make up this number:" is displayed.

	Named Segment Group	Segment
▶	Speed Code	XE1A-PPD-PAINT-GENERA
	Account	

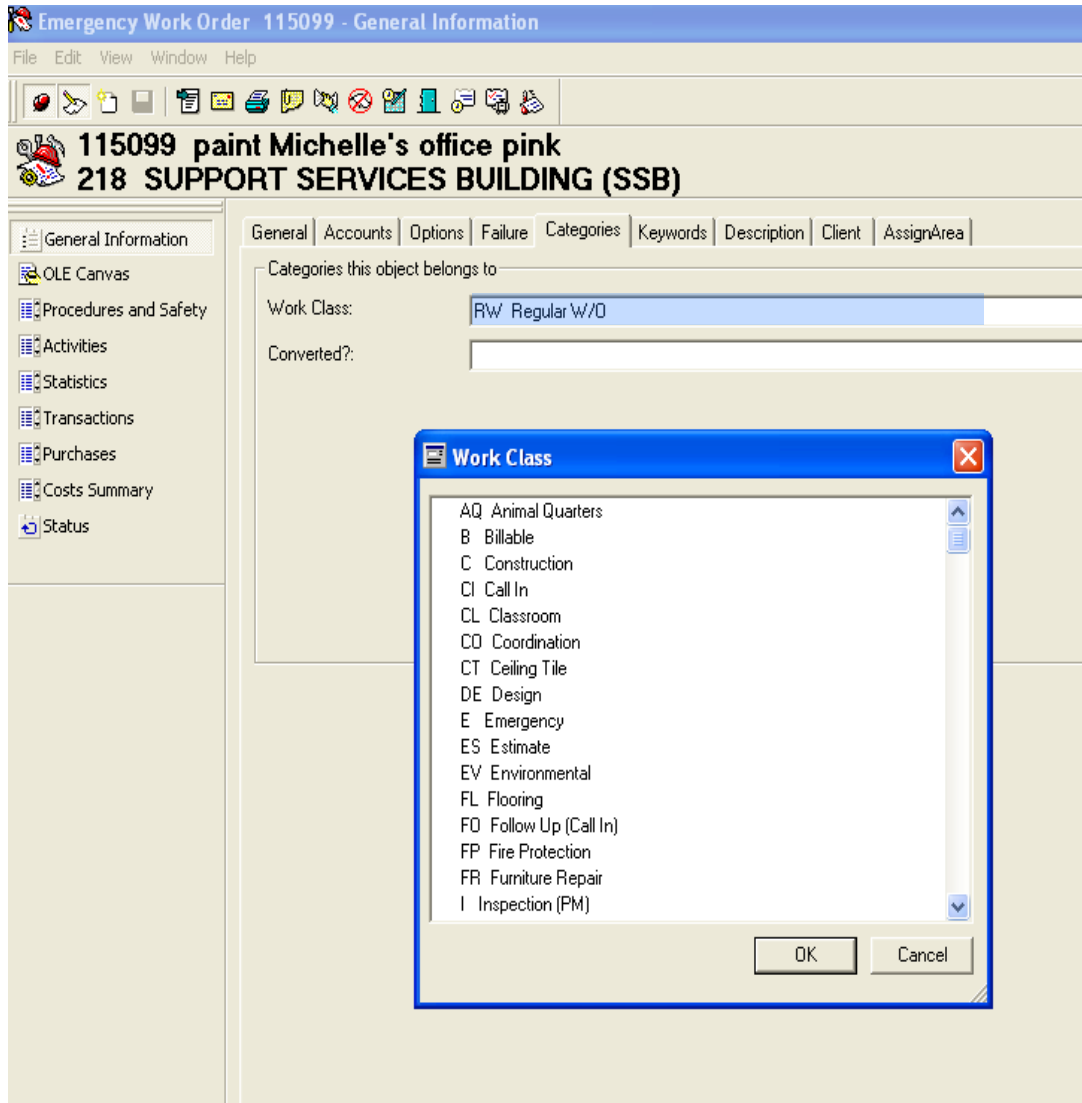
## Accounts

- enter the speed code
- enter the account (for billable work only)

Note: Residence accounts will populate automatically based on the entity (building) number



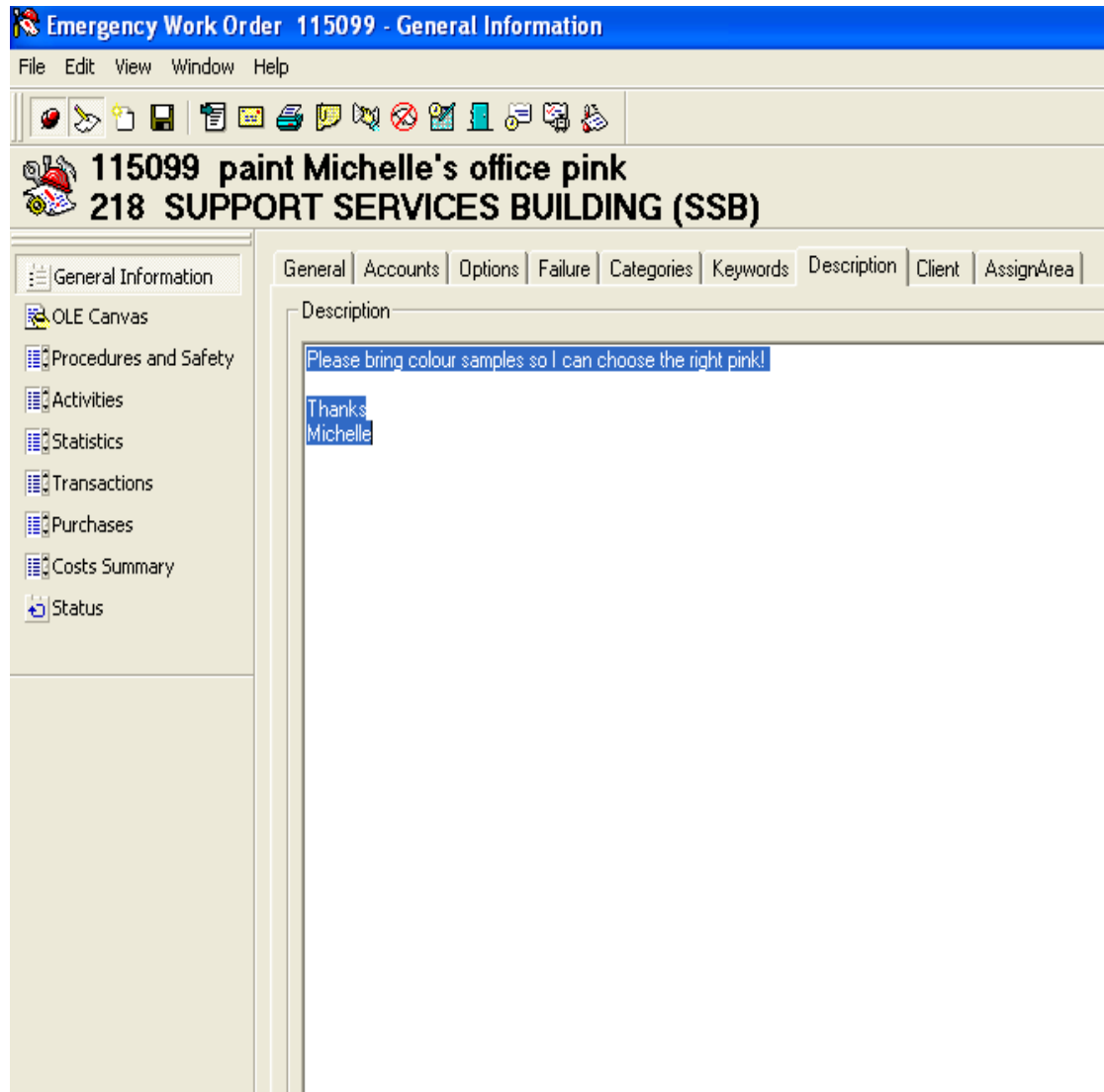
# Create WO – Step 4



## Categories

- select the correct value

# Create WO – Step 5



The screenshot shows a software window titled "Emergency Work Order 115099 - General Information". The window has a menu bar with "File", "Edit", "View", "Window", and "Help". Below the menu bar is a toolbar with various icons. The main title bar of the window displays "115099 paint Michelle's office pink" and "218 SUPPORT SERVICES BUILDING (SSB)". A tabbed interface is visible with tabs for "General", "Accounts", "Options", "Failure", "Categories", "Keywords", "Description", "Client", and "AssignArea". The "Description" tab is active, showing a text area with the following content:

Please bring colour samples so I can choose the right pink!

Thanks  
Michelle

On the left side of the window, there is a sidebar menu with the following items: "General Information", "OLE Canvas", "Procedures and Safety", "Activities", "Statistics", "Transactions", "Purchases", "Costs Summary", and "Status".

## Description

- enter the details of the work

# Create WO – Step 6

The screenshot shows a software window titled "Emergency Work Order 115099 - General Information". The window has a menu bar (File, Edit, View, Window, Help) and a toolbar with various icons. The main content area is divided into a left sidebar and a main panel. The sidebar contains a tree view with the following items: General Information (selected), OLE Canvas, Procedures and Safety, Activities, Statistics, Transactions, Purchases, Costs Summary, and Status. The main panel has a tabbed interface with tabs for General, Accounts, Options, Failure, Categories, Keywords, Description, Client (selected), and AssignArea. The "Client" tab is active, displaying a form with the following fields:

Client	
Room / Area:	2379
Client:	Michelle Knox
Client Phone #:	88739
Client Email:	
Confirmed with:	
Alternate Client:	
Alternate Client Phone #:	
Alternate Client Email:	

## Client

- enter the appropriate information
- **save work order** (click on disk on tool bar)