



Property Maintenance Work Orders

AWARDS INSTRUCTION SHEET

The Operations module Property Maintenance feature is used to enter, update, and delete property maintenance work orders as necessary, as well as to view read-only property maintenance work order reports.

REQUIRED PERMISSIONS

Permissions required to use the Property Maintenance feature are as follows:

- **Chart Access** – You must have chart access permission for any program(s) for which work order information is to be entered or accessed.

ABOUT THIS DOCUMENT

This document is intended to guide you through the process completing common property maintenance work order data entry and report viewing tasks. Specific topics covered are:

- **Entering a New Work Order** – Learn to create a property maintenance work order. Page 1
- **Updating or Deleting an Existing Work Order** – Learn to make changes or delete a work order. Page 3
- **Viewing a Work Orders Report** – Learn to view a read-only report of work orders. Page 5
- **Frequently Asked Questions** – Learn the answers to common work order questions. Page 7



ENTERING A NEW WORK ORDER

To enter a new property maintenance work order request, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Operations**. The *Operations Menu* page is displayed.
2. Click **Property Maintenance**. The *Maintenance Work Orders Preliminary Selection Settings* page is displayed. →
3. Click the **Work Site** drop-down arrow and select the site for which the work order request is being entered. Do not enter values into any of the other fields on this page.
4. Click **CONTINUE**. The *Maintenance Settings Selection Detail* page is displayed. →
5. If there is more than one address for the selected work site, click the **Address** drop-down arrow and select the address for

which the work order is to be entered. Leave all other options on this page at their default values.

Work sites with a single address will not have an Address selection option on this page as shown at right.

6. Click **CONTINUE**. The *Maintenance Selection Final Settings* page is displayed. 
7. Click the **Job Site** drop-down arrow and select the site for which the work order request is to be entered.
8. Click the **Database** drop-down arrow and select "Data Entry."
9. Click **CONTINUE**. The *Maintenance Work* selection page is displayed. 



Foothold Demo Maintenance Selection Final Settings

Family Housing One 08/22/2013 to 09/05/2013
Requestor: All 258 East 4th St Resident: All

Job Site	Job Type	Job Status	Sort By	Database
All Job Sites	All Types	All Jobs	Work Order Location	Data Entry

Select One Job Site to Add a New Request

CONTINUE

Jump Back Opening Menu Help Menu Log Out



Foothold Demo Maintenance Work 08/22/2013 to 09/05/2013
Family Housing One 258 East 4th St. Apt/Bed3G All Types All Jobs
Requestor: All Resident: All
Sorted by Work Order Location

Excel File

Job #	Req Date	Req By	Program	Work Site	Address	Apt/Bed	Location	Resident	Job Type	Urgency	Target	Description	Done	Done By	Work Started	Total Cost
<input type="checkbox"/> 10100.0	09/05/2013	Seymour, Melissa	Family Housing One	Family Housing One	258 East 4th St.	3G	Bathroom		Plumbing	Routine	09/09/2013	Fix Leaky Faucet		Unassigned		\$0.00
<input type="checkbox"/> 99999.9	09/05/2013	New Request		258 East 4th St. Apt/Bed3G												


Check Items to Update or Delete

DATA ENTRY DELETE New Search

Jump Back Opening Menu Help Menu Log Out

This page contains a table listing any existing maintenance work orders for the selected work site, address, and job site.

Click any of the table's column headings to sort the list by that variable. Clicking a heading more than once reverses the sort order. To also sort by a secondary variable, press <SHIFT> and click the second column heading.

10. Click the check box next to Job # 99999.9 – "New Request."
11. Click **DATA ENTRY**. The *Selected Maintenance Work Orders* page is displayed. 
12. Configure the fields and options on this page as necessary. For more information on those fields and options, refer to AWARDS Online Help.

All users can enter work order requests; however, only members of the "Operations" and "System Administrator" user groups have access to all work order information (for example, target date and done date). As a result, if you are not a member of one of those groups, some field and options on this page will not be available for data entry.

13. Click **UPDATE REQUEST**. The work order request is saved and the updated *Maintenance Work* selection page is displayed.



Foothold Demo Selected Maintenance Work Orders

Job # 99999.9 ReqDate 09/05/2013

Requested By Seymour, Melissa Resident Vacant

Address 258 East 4th St. Apt/Bed 3G

Location Bathroom Job Type Fire-Related

Urgency Emergency Target Date

Description* DoneDate

Done By Materials Cost \$ 0.00

Work Date 1 Hours

Work Date 2 Hours

Work Date 3 Hours

Work Date 4 Hours

Labor Rate \$ 0.00 Total Cost \$0.00

09/05/2013 Note Writer: Melissa Seymour

Spell Check

UPDATE REQUEST New Search Jump Back Opening Menu Help Menu Log Out

At this time a system generated message for the request is also sent out to the user who made the request and to all users with the "Superintendent's Log" data entry/access permission. If the work order is for an apartment in a residential program, the primary service coordinators in the program and the program director/deputies also receive the notification.

The process of entering a work order request is now complete.

UPDATING OR DELETING AN EXISTING WORK ORDER

To update or delete an existing work order request, complete the following steps:

1. From the **AWARDS Opening Menu** page, click **Operations**. The *Operations Menu* page is displayed.
2. Click **Property Maintenance**. The *Maintenance Work Orders Preliminary Selection Settings* page is displayed.
3. To narrow work order selection, configure one or more of the selection options on this page:
 - **Request Date Range** – Only those work orders requested on a date that falls within the date range entered here will be included in the selection process. The default date range is the past two weeks. Make changes to this default date range as necessary by typing the dates into the **From** and **To** fields (using mm/dd/yyyy format), or by selecting them using the calendar icon.
 - **Requestor Initials** – Only those work orders requested by users with the first and/or last name initials entered into the **First** and **Last** initial fields will be included in the selection process. Asterisks (*) in these fields will include all requestors in the selection process.
 - **Work Site** – Only those work orders requested for the selected work site will be included in the selection process. Click this drop-down arrow and select the work site for which the work order is to be updated. The default value is "All Work Sites."
 - **Resident Info** – Only those work orders for residents with the first and/or last name initials entered into the **First** and **Last** initial fields will be included in the selection process. Asterisks (*) in these fields will include all residents in the selection process.
4. Click **CONTINUE**. The *Maintenance Settings Selection Detail* page is displayed.
5. To further narrow work order selection, configure one or more of the settings on this page:
 - **Requestor** – Click this drop-down arrow and select the requestor associated with the work order to be updated or deleted. If requestor initials were entered on the previous page, only requestors with those initials are included in this selection list. If no requestor initials were entered, the default value for this selection list is "All Requestors."

The Requestor list includes everyone who has previously entered work order requests for the selected location, unless specifically limited by initials as mentioned above. Users who are not members of the "Operations" user group cannot select requestors other than themselves.

- **Address** – Click this drop-down arrow and select the address associated with the work order to be updated or deleted.

This option is only available when a work site was selected on the previous page.

- **Resident** – Click this drop-down arrow and select the resident associated with the work order to be updated or deleted. If resident initials were entered on the previous page, only residents with those initials are included in this selection list. If no resident initials were entered, the default value for this selection list is “All Residents.”

The Resident selection list includes everyone for which there is a work order in the date range specified on the previous page, unless specifically limited by initials as mentioned above. This selection option is not meant to be used for data entry, only reporting, and as such it is not a comprehensive list.

6. Click **CONTINUE**. The *Maintenance Selection Final Settings* page is displayed.
7. Click the **Database** drop-down arrow and select “Data Entry.”
8. To further narrow work order selection, configure one or more of the settings on this page:
 - **Job Site** – Click this drop-down arrow and select the job site associated with the work order to be updated or deleted.
 - **Job Type** – Click this drop-down arrow and select the job type of the work order to be updated or deleted. The default value is “All Types.”
 - **Job Status** – Click this drop-down arrow and select the job status of the work order to be updated or deleted. The default value is “All Jobs.”
9. Click the **Sort By** drop-down arrow and select one of the available options to indicate how work orders matching the selection criteria are to be sorted. Available selections are:
 - **Work Order Location** – When this option is selected, work orders are sorted alphabetically by work order location.
 - **Person Who Made Request** – When this option is selected, work orders are sorted alphabetically by work order requestor name.
 - **Scheduling Status** – When this option is selected, work orders are sorted by target date.
 - **Job Type** – When this option is selected, work orders are sorted alphabetically by location and job type.
 - **Request Date** – When this option is selected, work orders are sorted by the date on which the requests were made, with the most recent requests listed last.
10. Click **CONTINUE**. The *Maintenance Work* selection page is displayed. ↓

Foothold Demo Maintenance Work 08/22/2013 to 09/05/2013															
Family Housing One 258 East 4th St. Apt/Bed3G All Types All Jobs															
Requestor: All Resident: All															
Sorted by Work Order Location															
Excel File															
Job #	Req Date	Req By	Program	Work Site	Address	Apt/Bed	Location	Resident	Job Type	Urgency	Target	Description	Done	Done By	Total Cost
<input type="checkbox"/> 10100.0	09/05/2013	Seymour, Melissa	Family Housing One	Family Housing One	258 East 4th St.	3G	Bathroom		Plumbing	Routine	09/09/2013	Fix Leaky Faucet		Unassigned	\$0.00
<input type="checkbox"/> 99999.9	09/05/2013	New Request	258 East 4th St. Apt/Bed3G												
Check Items to Update or Delete															
DATA ENTRY DELETED New Search Jump Back Opening Menu Help Menu Log Out															

This page contains a table listing any existing maintenance work orders for the selected work site, address, and job site.

Click any of the table's column headings to sort the list by that variable. Clicking a heading more than once reverses the sort order. To also sort by a secondary variable, press <SHIFT> and click the second column heading.

11. Click the check box next to the work order to be updated or deleted.

Unless you are a member of the "Operations" user group, you can only complete these tasks for those work orders you entered.

12. After the appropriate work order is selected, proceed with the update/delete process as follows:

- **When updating an existing work order** – Click **DATA ENTRY**. The *Selected Maintenance Work Orders* page is displayed. Make changes or additions to the information on this page as necessary, referring to AWARDS Online Help if you need more information about any of the page's fields/options. When all changes are complete, click **UPDATE REQUEST** to save.
- **When deleting an existing work order** – Click **DELETE**. The *Selected Maintenance Work Orders to be Deleted* page is displayed. Verify that the correct work order was selected, and then click **CONFIRM DELETE** to delete the record.

The process of updating/deleting a work order request is now complete.

VIEWING A WORK ORDERS REPORT

To view a read-only work order request report, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Operations**. The *Operations Menu* page is displayed.
2. Click **Property Maintenance**. The *Maintenance Work Orders Preliminary Selection Settings* page is displayed.
3. To narrow work order selection, configure one or more of the selection options on this page:
 - **Request Date Range** – Only those work orders requested on a date that falls within the date range entered here will be included in the selection process. The default date range is the past two weeks. Make changes to this default date range as necessary by typing the dates into the **From** and **To** fields (using mm/dd/yyyy format), or by selecting them using the calendar icon.
 - **Requestor Initials** – Only those work orders requested by users with the first and/or last name initials entered into the **First** and **Last** initial fields will be included in the selection process. Asterisks (*) in these fields will include all requestors in the selection process.
 - **Work Site** – Only those work orders requested for the selected work site will be included in the selection process. Click this drop-down arrow and select the work site for which the work order is to be updated. The default value is "All Work Sites."
 - **Resident Info** – Only those work orders for residents with the first and/or last name initials entered into the **First** and **Last** initial fields will be included in the selection process. Asterisks (*) in these fields will include all residents in the selection process.
4. Click **CONTINUE**. The *Maintenance Settings Selection Detail* page is displayed.
5. To further narrow work order selection, configure one or more of the settings on this page:

- **Requestor** – Click this drop-down arrow and select the requestor associated with the work order to be viewed. If requestor initials were entered on the previous page, only requestors with those initials are included in this selection list. If no requestor initials were entered, the default value for this selection list is "All Requestors."

The Requestor list includes everyone who has previously entered work order requests for the selected location, unless specifically limited by initials as mentioned above. Users who are not members of the "Operations" user group cannot select requestors other than themselves.

- **Address** – Click this drop-down arrow and select the address associated with the work order to be viewed.

This option is only available when a work site was selected on the previous page.

- **Resident** – Click this drop-down arrow and select the resident associated with the work order to be viewed. If resident initials were entered on the previous page, only residents with those initials are included in this selection list. If no resident initials were entered, the default value for this selection list is "All Residents."

The Resident selection list includes everyone for which there is a work order in the date range specified on the previous page, unless specifically limited by initials as mentioned above. This selection option is not meant to be used for data entry, only reporting, and as such it is not a comprehensive list.

6. Click **CONTINUE**. The *Maintenance Selection Final Settings* page is displayed.
7. Click the **Database** drop-down arrow and select "Reports."
8. To further narrow work order selection, configure one or more of the settings on this page:
 - **Job Site** – Click this drop-down arrow and select the job site associated with the work order to be viewed.
 - **Job Type** – Click this drop-down arrow and select the job type of the work order to be viewed. The default value is "All Types."
 - **Job Status** – Click this drop-down arrow and select the job status of the work order to be viewed. The default value is "All Jobs."
13. Click the **Sort By** drop-down arrow and select one of the available options to indicate how work orders matching the selection criteria are to be sorted. Available selections are:
 - **Work Order Location** – When this option is selected, work orders are sorted alphabetically by work order location.
 - **Person Who Made Request** – When this option is selected, work orders are sorted alphabetically by work order requestor name.
 - **Scheduling Status** – When this option is selected, work orders are sorted by target date.
 - **Job Type** – When this option is selected, work orders are sorted alphabetically by location and job type.
 - **Request Date** – When this option is selected, work orders are sorted by the date on which the requests were made, with the most recent requests listed last.

14. Click **CONTINUE**. The *Maintenance Work* selection page is displayed. ↓

Foothold Demo Maintenance Work 08/22/2013 to 09/05/2013															
All Work Sites All Job Sites All Types All Jobs															
Requestor: All															
Sorted by Work Order Location															
Excel File															
Job #	Req Date	Req By	Program	Work Site	Address	Apt/Bed	Location	Resident	Job Type	Urgency	Target	Description	Done	Done By	Total Cost
<input type="checkbox"/> 10100.0	09/05/2013	Seymour, Melissa	Family Housing One	Family Housing One	258 East 4th St.	3G	Bathroom		Plumbing	Routine	09/09/2013	Fix Leaky Faucet		Unassigned	\$0.00
Check Items to Show															
<div>SHOW New Search</div> <div>Jump Back Opening Menu Help Menu Log Out</div>															

This page contains a table listing all existing work orders matching the selection criteria specified on the previous pages.

Click any of the table's column headings to sort the list by that variable. Clicking a heading more than once reverses the sort order. To also sort by a secondary variable, press <SHIFT> and click the second column heading.

15. Click the check box next to each work order to be included in the report.

Unless you are a member of the "Operations" user group, you cannot select work orders other than those you entered.

16. Click **SHOW**. The *Selected Maintenance Work Orders* page is displayed with a read-only report version of the selected work order(s).

The process of viewing a work order request report is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding Property Maintenance work orders and apartment painting records can be a useful reference when you have your own questions about the functionality.

ARE ALL USERS ABLE TO ENTER WORK ORDERS OR ARE PERMISSIONS REQUIRED?

All users with access to the Operations module and chart access permission can enter work order requests for the programs to which they have access. They can also update and delete those requests which they themselves entered; however, some portions of work order records are reserved for use by the Operations and System Administrators user groups. Specifically, "Requested By," "Done By," "Done Date," "Target Date," "Materials Code," and "Labor Rate" information within a work order can only be entered by a member of those groups.

There is a behind-the-scenes option that, when set, lifts the Operations/System Administrator user group restrictions and enables specified users or user groups to enter data in all work order fields/options, as well as to edit/delete work orders entered by others. If that is something you are interested in having turned on in your AWARDS database, please contact your Foothold client services representative or the Help Desk.

CAN THE ENTRY OR COMPLETION DATES OF WORK ORDERS BE BACKDATED?

No, there is currently no way to backdate within the Operations module. The system was designed to record work orders as they are entered rather than ones that may have been submitted previously via another system.

CAN USERS ENTER WORK ORDERS FOR PROGRAMS THEY DON'T HAVE ACCESS TO?

Anyone who has access to the Operations module can create work orders for non-program work sites; for example, a business office. In order to enter work orders for program work sites however, chart access permissions are required.

CAN WORK ORDER DATA ENTRY BE LIMITED TO SPECIFIC USERS?

No, anyone who has access to the Operations module can enter work orders. Note though that unless you are a member of the Operations or System Administrators user groups, you can only work with those work orders you entered. Additionally, the fields/options you can configure in work orders is limited unless you are Operations/System Administration staff; specifically, "Requested By," "Done By," "Done Date," "Target Date," "Materials Code," and "Labor Rate" data cannot be updated by other users.

There is a behind-the-scenes option that, when set, lifts the Operations/System Administrator user group restrictions and enables specified users or user groups to enter data in all work order fields/options, as well as to edit/delete work orders entered by others. If that is something you are interested in having turned on in your AWARDS database, please contact your Foothold client services representative or the Help Desk.

DO OPERATIONS STAFF RECEIVE WORK ORDER NOTIFICATIONS AUTOMATICALLY?

Members of the Operations user group do not receive work order notification messages by default. They will only receive those messages if they have the "Superintendent's Log" permission, and/or if they were the person who made the work order request.

HOW ARE WORK ORDER ID NUMBERS ASSIGNED?

Work order ID numbers are assigned consecutively across all programs. For example, if a work order in program A has an ID number of 10001, the next work order entered will have an ID number of 10002, regardless of whether it is also entered in program A or another program.

HOW ARE WORK ORDERS ASSIGNED TO SPECIFIC USERS?

There is no option to assign work orders to particular staff members. There is, however, the option to specify who completed the work order using the "Done By" option.

HOW ARE WORK SITES ADDED TO THE "WORK SITES" SELECTION LIST?

Changes to the work sites list must be made by Foothold Technology. Please contact the Help Desk for assistance.

WHICH PROGRAMS DO USERS WITH THE "SUPERINTENDENT'S LOG" PERMIT RECEIVE WORK ORDER NOTIFICATIONS FOR?

Users with that permission receive all work order notifications, regardless of the program for which they are generated. Chart access permissions of the user are not taken into consideration.

WHO IS INCLUDED IN THE WORK ORDER "REQUESTOR" LIST?

The requestor selection list includes everyone who has previously entered work order requests within the date range and for the location specified on the *Preliminary Selection Settings* page. It is also limited to those users whose initials are the same as those specified in the "Requestor Initials" fields on the previous page (if any).

WHO IS INCLUDED IN THE WORK ORDER "RESIDENT" LIST?

The resident selection list on the work order *Maintenance Settings Selection Detail* page was not meant to be used for data entry purposes, only reporting, and as such it is not comprehensive. It includes everyone for which there is a work order in the date range specified on the previous page, and whose initials are the same as those specified in the "Resident Info" fields on that previous page (if any).

WHO RECEIVES WORK ORDER NOTIFICATION MESSAGES?

Work order notification messages (whether for new work orders or for updates to existing work orders) are sent to all users with the "Superintendent's Log" permission, as well as to the person who made the work order request. If the work order is for an apartment in a residential program, the primary service coordinators in the program and the program director/deputies will also receive the notification.

WHY CAN'T I ENTER DATA IN ALL OF THE WORK ORDER FIELDS?

Some pieces of work order requests can only be updated by members of the Operations user group; specifically, "Requested By," "Done By," "Done Date," "Target Date," "Materials Code," and "Labor Rate."

There is a behind-the-scenes option that, when set, enables other specified users or user groups to enter data in these fields, as well as to edit/delete work orders entered by others. If that is something you are interested in having turned on in your AWARDS database, please contact your Foothold client services representative or the Help Desk.