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Basic Work Order Process Flow

Requester

Phone Request
Web Request
Email Request
Fax Request
Verbal Request

Request Log

Validation

Accepted

Request Rejected

Supervisor Generated Work

Work Order

Supervisor Review and Assign

Technician Assess & Performs Work

Status is updated

Supervisor Review

Work Incomplete

Work Complete

Work Order Input Closed

Email Sent to Requester
Basic Custodial Process Flow

Building Schedules

Create Program (5/6/7 day & equipment)

Copy Templates (select correct Program)

Add Equipment Tasks

Assign Shift to Template Tasks

Run Labor Estimates and Validate data

Building Routine Assignment's Route (Schedules)

Create/Print Schedules

Building Estimates

Create Program (2011 Estimate)

Copy Templates (select Estimate Program)

Add Equipment Tasks

Assign Shift to Template Tasks

Run Labor Estimates using Estimate Program
Work Flow - Processes

Work Orders

External
1. External - Submit a Request
2. Accepting and Rejecting Requests

Internal
1. Create Work Orders – Internal
2. How to Assign Technicians
3. Review or adjust assignments
4. Update Status
5. Closing Work Orders
6. Batch Closing Work Orders

PMs
1. Reviewing PMs
2. Setup PM by Task
3. Setup PMs by Item
4. New Equipment and setting up PMs

Projects
1. Creating Projects
2. Creating Project Tasks
3. Converting Project Task To Work Orders

Custodial

Custodial Routine Setup
1. Linking Programs to Facility, Building, or Floor
2. Customizing Custodial settings at the Template level
3. Adjusting Area Matrix (If specific adjustments are required (adding equipment etc.)
4. Build Schedules
5. Print/Export Schedules
6. Inspections
7. Area Add - Custodial Setup or Area Edit - Custodial Setup (only for new buildings/Areas or adjustments)
8. Template (For Estimating purposes)

Custodial Project Setup
1. Project Assignment
2. Converting Project Items into Work orders
3. Project Gantt
Utilities
1. Utility Meters
2. Tickets
3. Ticket - Accounts Payable Invoice
4. Weather

Keys
1. Keys
2. Key Quantities
3. Key Rings
4. Key Locks
5. Key Holders

Events
1. Creating Events
2. Accepting/Rejecting an Event
3. Converting Events to Projects
Login

All general users must complete the three Login fields to log in successfully.

Go to www.webtma.net

Once you have accessed the site follow these instructions to log in.

1. Enter your Login ID.
2. Enter Password.
3. Enter Client “aramarkh”.
4. Click Login.

NOTE: You can select remember me, and the site will retain the login ID and Client the next time you access this site. You can also bookmark this page for easy access later.

My Page

My page will be made up of multiple tabs and vary depending on your user access.

- The first tab should be ARAMARK’S corporate My Page with useful link and messages.
- The My Work Order Tab will list all work orders current open and assigned to you.
- Open Requests will list all the Pending Requests that need to be processed in the system.
- KPI vary depending on your line of business and level of access.
Basics

Add New Records
The Add functionality is available only if users rights have been granted for the specific window you are trying to access. This option allows users to add new records. To add a record:

1. Open the record window you want to add a new item to.
2. Click Add on the Toolbar. All required field labels are red.
3. After you have entered in all the required and optional data you need, click Save on the Toolbar.

Edit Records
The Edit functionality is available only if users rights have been granted for the specific window you are trying to access. This option allows users to make changes to existing records. To edit a record:

1. Open the record window and find the item you want to edit.
2. Click Edit on the Toolbar.
3. Make the necessary adjustments.
4. After you have made all the changes, click Save on the Toolbar.

Copy
A good example of the Copy function is copying an existing PM task that you want to modify to meet site specific procedures. This option is only available if the user has the ability to add records. To Copy a record:

1. Open the record window and find the item you want to Copy.
2. Click Copy on the Toolbar.
3. Make the necessary adjustments to unique value fields such as codes and descriptions.
4. Make additional modification to other optional field as needed. If copying a PM task you would change the Task code and descriptions along with the PM task sheet to meet site-specific needs.
5. After you have made all the changes, click Save on the Toolbar.

Next/Previous/First/Last
Next and Previous functions on the Tool bar navigate users through the record list by order of entry. First and Last open the first and last records entered into the database.

Search
The Search function is the easiest way to search through records and find specific records based on user-definable search criteria. To search for records:

1. Open the record window you want to search on.
2. Click Search on the Toolbar.
3. Use the field selection to narrow the criteria you want to search on.
4. Select the search criteria option, this changes based on the type of field you are searching against.
5. Enter the criteria.
6. Click the Find button to search.
7. Double-click any line item to open the record. NOTE: If you want to retain your search list, uncheck the Close Window option.

Requests

Creating Requests

External - How to build the URL link
1. Open the Facility window to build the link.
2. Find and open the facility for which you want to create the Request page.
3. Click Generate URL in the Action Menu.
4. Copy and paste the link into a browser, or email to the client to use as a shortcut.
**External - Submit a Request**

All red labeled fields are required

1. Click on the shortcut or URL favorite created in previous step.
2. Enter Requestor Name (First and Last).
3. Enter Phone #.
4. Enter Requestor Email.
5. Once complete, click the Submit button to generate a request.

NOTE: Notify Me turns on the email transaction with the requestor and sends notification on creation, status changes, and completion.

Useful Links: [Back to Process Flow, Processing Requests](#)

**Internal**

*Path: Transactions > Request > Request Log / Identity Tab*

**How to Add Work Requests**

1. Click Add on the WebTMA toolbar.
2. Accept the default *Request Date* and time or change if necessary.
3. Enter the *Requestor Name* (First and Last).
4. Enter Phone #.
5. Enter Email address if applicable.
6. Type the *Action Requested* information. This is a free-form field used to describe the work to be done.
7. Select the *Request Type Desc* (Internal)
8. Select or type additional information in the elective fields described below.
9. Click Save on the WebTMA toolbar.

The *Request #* field populates automatically when the request is saved.

NOTE: Notify Me turns on the email transaction with the requestor and sends notification on Creation, status changes, and completion.

Useful Links: [Back to Process Flow, Processing Requests](#)

**Accepting and Rejecting Requests**

**Accepting Requests**

1. Go to Transactions >Request >Batch Validation
2. Enter date criteria.
3. Select List Requests.
4. Select all and click Validate.
5. Click OK or Cancel to close pop-up window.
6. Verify or choose Location or Item info.
7. Select Profit Center if not already populated.
8. Verify WO type.
10. Select Task Code.
11. Verify Priority.
12. Select or verify Trade.
13. Adjust Action Requested as needed or check spelling.
14. Save.

Useful Links: Back to Process Flow, Scheduling Work Orders

Rejecting Requests
1. Go to Transactions > Request > Batch Validation
2. Enter Date criteria.
3. Select List Requests.
4. Click the check box for each line item to be deleted.
5. Click the Reject button.
6. Add the Reject Reason to the popup window.
7. Click the desired reply radio button.
8. Click the OK button on the popup to complete the rejection.

When the window refreshes, a red dot in the second column indicates the line items you rejected.
Useful Links: Back to Process Flow

Create Work Orders – Internal
Use this process to create a work order for work identified by ARAMARK personnel.
Path: Transactions > Work Order > Simple WO
1. Click Add.
2. Enter Location or Item info.
3. Select Profit Center if not already populated.
4. Verify WO Type.
5. Verify/select WO Subtype.
6. Select Department if applicable.
7. Verify Request Date.
8. Verify Priority.
9. Enter the Requestor Name (First and Last).
10. Enter Phone # and Email address if applicable.
11. Adjust Action Requested as needed or check spelling.
13. Verify or select Trade.
14. Save and note WO #.

Useful Links: Back to Process Flow, Scheduling Work Orders

**Scheduling Work Orders**

**How to Assign Technicians**

*Path: Transactions > Time Manager > Scheduler*

1. Select Shift and Trade and any other fields to refine your search as needed.
2. Click the *Save* button.
3. Validate or enter Date, Shift, and Trade.
4. Click the Schedule link on the Action Menu.
5. Click a work order check box in the upper pane and a technician check box in the lower left pane.
6. Click the Schedule link once more on the Action Menu.
7. Click Save on the WebTMA toolbar.
8. Click OK or Cancel print to complete scheduling.

Click on desired print option when the window refreshes. Your assignment displays in the lower right Gantt pane. Click the new assignment bar to open the Schedule Item Properties popup window.

Useful Links: Back to Process Flow, Closing Work Orders

**Review Assignments**

*Path: Transactions > Time Manager > Review Assignments*

1. Open the Review Assignments window.
2. Complete as many of the fields as needed to filter your search. Note: Only a date range is required.
3. Click the Set Query link on the Action Menu
4. Click the check boxes in the grid of the lines you want to affect.
5. Use the radio button on right hand side to unassigned or reassign work. Do not use the Remove option.
6. Click the check box adjacent to the Work Order lines to be changed
7. If reassigning, type or select the Technician code of the replacement technician in the field adjacent to this radio button. The field does not appear until the radio button is selected.
8. Click the Reschedule Selected link on the Action Menu to make the changes. The
   new name displays when the window refreshes

Useful Links: Back to Process Flow

Planned Maintenance

Review PM Schedules

Item Based

Building, Area, Equipment, Asset, etc

In this system, a PM Schedule can be assigned to a Building, an Asset, Equipment, or
even a Tool. To look at any of the PMs currently scheduled to an item, open the item
form and go to the PM Tab.
1. Locate the desired Item.
2. Click on the PM Tab.
3. All PM Schedules will be listed for that item.

Useful Links: Back to Processes, Build a PM

Task Based

Path: Organization > Task > Records / PM Tab
1. Locate the desired Task Code.
2. Click on the PM tab
3. All PM schedules for all items will be listed

Useful Links: Back to Processes, Build PMs

How to Create Task PM Schedules

Path: Organization > Task > Records / PM Tab
1. Locate the desired Task Code.
2. Click Edit on the WebTMA toolbar.
3. Go to the PM tab.
4. Click the Modify link at the top of the grid. Note: If no items have been added to a
task, the link reads Add PM.
5. Click the Add PM link to open the Item Selection popup window.
6. Click the check boxes of all items you want to add.
7. Click the Add Selected button.
8. Click the Close button on the window.
9. Validate or enter RC Code:
10. Enter Priority:
11. Enter Due Every: and Select Frequency
12. Select Trade:
13. Select WO Type:
14. Verify Next PM Date:
15. Click the Apply to Selected link.
16. Click Save on the WebTMA toolbar.

Useful Links: Back to Processes

Caution: Step 15 is very important. Unless you apply these settings to the selected item, the system does not add a schedule.

Add PM Schedules to an existing Item – including Meter based PM’s

Path: Organization > Item (Equipment, Vehicle, etc.) > Records / PM Tab
1. Locate the desired Record. (Equipment, Asset, Tool, Vehicle, Area, etc.)
2. Click Edit on the WebTMA toolbar.
3. Go to the PM tab.
4. Click the Modify link at the top of the grid. Note: If no items have been added to a task, the link reads Add PM.
5. Click the Add PM link to open the Item Selection popup window.
6. Click the check boxes of all items you want to add.
7. Click the Add Selected button.
8. Click the Close button on the window.
9. Check only the tasks you want to schedule using the check box on the left.
10. Validate or enter RC Code.
11. Enter Priority.
12. Enter Due Every.
13. Select Frequency.
14. Select Trade.
15. Select WO Type.
16. Verify Next PM Date.

If Meter-based
17. Click the Meter Based subtab in the lower right.
18. Enter the Interval (every X number of Y).
19. Enter Next PM Meter.
20. Select Assigned Meter (the Meter the schedule is affected by).
21. Click the Apply to Selected link in the upper right of list to apply data to the PM line.
22. Repeat steps 9-21 until all tasks have been scheduled.
23. Click Save on the WebTMA toolbar.

**Caution** Step 20 is very important. Unless you apply these settings to the selected item, the system does not add a schedule.

Useful Links: Back to Process Flow

**How to Add New Equipment with PM Schedules**

*Path: Organization > Task > Records / PM Tab*

Any Maintenance-worthy Item that a user copies will also bring the PM schedule with it. For all new equipment it is preferred that you find a piece of equipment that is equal to or similar to the new item and use the Copy feature off the toolbar.

1. Locate a record that is identical to the item you want to add. (Equipment, Asset, Tool, Vehicle, Area, etc.)
2. Click Copy on the Toolbar.
3. Modify all field details and Tag# as needed.
4. Go to the PM tab. Notice all PM schedules that were assigned to the original item are listed.
5. Click the Modify link at the top of the grid. Note: If no items have been added to a task, the link reads Add PM.
6. Select the PM line by putting a check in the box on the left.
7. Validate or enter RC Code.
8. Validate or enter Priority.
9. Validate or enter Due Every.
10. Validate or enter Frequency.
11. Validate or enter Trade.
12. Validate or enter WO Type.
13. Verify Next PM Date.
   **If Meter-based**
14. Click the Meter Based sub tab in the lower right.
15. Enter the Interval (every X number of Y).
16. Enter Next PM Meter
17. Select Assigned Meter (The Meter the schedule is affected by)
18. Click the Apply to Selected link in the upper right of list to apply data to the PM line.
19. Repeat steps 7-19 until all PM tasks are adjusted.
20. Click Save on the WebTMA toolbar.

(Warning) Step 20 is very important. Unless you apply these settings to the selected item, the system does not add a schedule.

Useful Links: Back to Process Flow

Customizing PM Tasks
Follow these steps to create custom tasks from existing PM Schedules

1. Go to Equipment: Organization>Equipment>PM Tab.
2. Double-click on a specific Task Code you want to modify.
3. Click COPY on the control bar, and a new window opens.
4. Rename the Task Code with the following nomenclature:

Site Specific

Site specific Planned Task coding: Prefix P=PM, I=Inspections, A=Administrative, R=Rounds + Sequential number by Task type + “.” + 4 digit Profit Center code

Example: P1500-5879 represents PM task with 1500 code for Carpentry-related task and Profit Center 5879. See Task Type coding below.

Site specific Planned Task Name: Prefix + S + “.” + C+ “.” + O + “.” + Interval + “.” + 4 digit Profit Center code

Example: 5879-NFE-Furniture-Bed-First Aid-1 Year

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<th>Type Description</th>
<th>Sub Type Code</th>
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<td>R55000</td>
<td>Masonry/Concrete</td>
</tr>
<tr>
<td>R60000</td>
<td>Mechanical</td>
</tr>
<tr>
<td>R65000</td>
<td>Motor Pool</td>
</tr>
<tr>
<td>R70000</td>
<td>Painting</td>
</tr>
<tr>
<td>R75000</td>
<td>Parking Lot</td>
</tr>
<tr>
<td>R80000</td>
<td>Pest Control</td>
</tr>
<tr>
<td>R85000</td>
<td>Plumbing</td>
</tr>
<tr>
<td>R90000</td>
<td>Refrigeration</td>
</tr>
<tr>
<td>R95000</td>
<td>Safety</td>
</tr>
</tbody>
</table>

5. Go to the Task Tab. Modify text as required for this piece of equipment. (Priority, timing, trades, employees assigned, and seasonal shut down are NOT performed here. You are only modifying the actual steps of the task itself. However, this is where you might specify special equipment or procedures.)

6. Click Save on the Toolbar to save Task

7. Close the Task window and you should be back to the Equipment PM tab you started from.

8. Click EDIT on the control bar.

9. Click the Modify hyperlink at the top of the list.

10. Click the Pencil icon (Edit) on the old task code.

11. Change the old Task code to the new Code.

12. Click the Save button at the bottom to save new Task.

13. Click on the line you just modified and click Save on the Toolbar.
**Updating Work Order Status**

**Work Order Window**

Path: Transactions > Work Order > Records

1. Locate the work order you want to update
2. Click Edit off the Toolbar
3. Type or select the status into the Status field on the left center of the identity tab
4. Click the Save on the Toolbar to save changes.

Note: If Notify is turned on and there is an email address, an email will be sent to the address.

Useful Links: [Back to Process Flow](#)

**WO Browse**

Path: Transactions > Work Order > WO Browse

WO Browse is the master search tool used to find work orders based off key criteria.

1. Set up the Criteria that meets your searching needs.
2. Click List Records.
3. Use options at the bottom to manage the list and perform different functions.
4. Click on the New Query selection hyperlink in the upper left of window to rebuild the list.

Useful Links: [Back to Process Flow](#)

**Closing Work Orders**

**How to Quick Post Cost**

Path: Transactions > Quick Post > Quick Post Cost

When you follow the path, the Work Order Cost Entry window opens in the foreground. Posting Labor, Parts, or Other costs to this window yields the same results as posting these costs to the Work Order / Cost tab.

1. Type or select the related Work Order #. Most of the required fields are populated.
2. Select the Cost Type. (Labor, Part or Other.)
3. Validate or complete the required fields.
4. Complete any elective fields as needed.
5. Click the Save & Add or Save & Clone option on the right side of the Save button to make additional entries.

   Note: Add allows new but no info while Clone duplicates the data previously entered.

6. Click Save and Close to view the line items entered.

Line items are displayed in the background Quick Post Cost window as you enter and save data. You can edit or delete line items until you click Save on the toolbar. Once you save the records, WebTMA writes the information to the database and clears lines from the window. Click the Add link at the top of the grid to re-open the entry window and continue adding line items.

Useful Links: Back to Process Flow

**Batch Closing Work Orders**

*Path: Transactions > Work Order > WO Browse*

Closing work orders is the final step of the work order process. This function is primarily used to close PMs that were not performed within their allotted time.

1. Open the WO browse window.
2. Set up the Criteria that meets your searching needs.
3. Click List Records.
4. Select all WOs that you want to close by checking the check box.
5. Click the Close Selected button at the bottom of the window.
6. Respond to the confirmation.
7. Set Closed date and click the save button.
8. Click the Closed Selected button to perform the close process.

Useful Links: Back to Process Flow

**Projects**

**(Creating Projects)**

*Path: Transactions > Project > Records*

1. Click Add on the Tool Bar.
2. Enter Project Name: Profit Name + "-" + Site Specific Project Name
3. Enter or select Type.
4. Enter or select Sub Type.
5. Enter or Select Requestor.
6. Complete any other optional fields as needed.
7. Click on the Profit Center Tab.
8. Click Add Profit Center hyperlink.
9. Select all Profit Centers that apply.
10. Click the Save button at the bottom of screen to save list to Project.
11. Click Save on the Toolbar to save the project.

Useful Links: Back to Process Flow

Creating Project Tasks
*Path: Transactions > Project > Records/Task & Resources*

This conversion process is a manual process. The system is set up to auto-generate all Project tasks that have all WO criteria completed on a weekly cycle. If you do not want the task to auto-generate, omit the Work Order type until you are ready to manually or automatically generate.

1. Find the Project you want to modify.
2. Click Edit on the toolbar.
3. Click the Task & Resources tab.
4. Enter a name.
5. Enter a Description.
6. Complete addition optional fields in the top two Sections.
   *Note: if you want to use Gantt functionality, you must enter an estimated start and end date and time on the task.*
7. If you wish to turn the task into a work order complete steps 8 - 13, else go to 16.
8. Select or enter Work Order Type in section one.
9. Select or enter Profit center in section one.
10. Enter Location or Item into the third sections.
11. Enter general comments about this task.
12. Select the task.
13. Select the trade.
14. Select contractor if applicable.
15. Select Employee if applicable.
16. Click Save at the bottom to save record.

Useful Links: Back to Process Flow

Converting Project Task to Work Orders
*Path: Path: Transactions > Project > Records/Task & Resources*

1. Find the Project you want to modify.
2. Click the Task & Resources tab.
3. Double-click any task line you wish to convert to a work order.
   *Note: If any required information is missing, you will be prompted for it, else the application will process the task and open the WO window populated with all data you provided.*
4. Adjust the WO as needed.
5. Click Save on the Toolbar to save the WO.
Custodial Crews

Path: Transactions > Custodial > Custodial Crews

1. Click Add.
2. Enter Crew ID (Profit Center ID + “-” + Crew ID).
3. Enter Crew Description (Profit Center ID + “-” + Crew Description).
4. Click Add Members hyperlink.
5. Select all employees that apply by checking the box on the left of the line.
6. Click the Save button at the bottom of the window to save assignments.
7. Click Save on the Toolbar to save the Custodial Crew.

Useful Links: Back to Process Flow

Matrix

Area - Custodial Setup
This section pertains to the basic custodial information that is stored on the area record and is required.

Path: Organization > Areas

1. Locate and Edit or Add an area record.
2. Assign a Custodial Space Type at the bottom right corner of the Identity window.
3. Enter the Cleanable Square Footage (CSF).
4. Assign a Custodial Priority between 1-5 with 1 being the highest.
5. Click to check the Custodial box making the area a custodial location.
6. Click on the Custodial Audit Item Tab.
7. Click Add Audit Items or Items.
8. Select the items that apply.
9. Enter count or square footage values per item.
10. Click Save to save the area info along with audit item assignments.

Useful Links: Back to Process Flow
Area – Adjusting Custodial Audit Items

Path: Organization > Areas > Audit Items tab

1. Make any necessary changes to the Custodial item in the bottom right
2. Click on the Custodial Audit Item Tab
3. Click on add audit items pencil or trash can to modify existing data.
4. Click Save to save the area info along with audit item assignments.

Useful Links: Back to Process Flow

Templates

Templates are copies of the matrix used in conjunction with Programs and Custodial Space Types to form a new Matrix grouping for scheduling purposes at a site level.

Programs are used to group together Matrix Templates so users can build multiple estimate options or a new matrix to overwrite the corporate matrix. It is also at this group level where users can link a Program to Client, Building, or Floor. Area overwrites should occur at the Area Matrix level since it is not grouped. A Program does not become valid for estimating or scheduling until you assign to a template matrix and assign shifts.

Creating Programs

Path: Organization > Lookups > Custodial Program

1. Click Add.
2. Enter a Program Code.
3. Enter a Program Description.
4. Mark Estimated if this program will be used for estimating purposes.
5. Go to the Link Tab.
6. Click Add Link.
7. Select the level you want to apply to the Program in the upper right.
8. Use the list at the bottom to select and the list in the upper left to filter.
   
   Note: Users can utilize additional filters by using the Tag or Description filter in the upper right of the Item Entry window.
9. Click the Add Selected button at the bottom once you have selected all the items to apply the Program to.
10. Click the Close button if no more items are needed.
11. Click Save on the Toolbar to save the Program.

Back To Custodial Processes
**Copying a Program**

Users copy a Program to either customize a setup at a Client site to override corporate standards or to create estimates. All programs that are copied from the Master Program and not marked as an estimate will supersede Master Programs.

*Path: Organization> Lookup> Custodial Program*

1. Find a Custodial Program to copy.
2. Click Copy on the Toolbar.
3. Select if the copy is an estimate.
4. A message asks if you want to copy over the templates already associated with the copied program, select Yes if you are customizing the setup.
5. Enter a new Program Code: Original Code+”-“+Profit Center code.
6. Enter a new Description: Original Name+”-“+Profit Center Name.
   
   Note: If for estimating, prefix the code and name with “E” and a number. If the program is specific for a building or a floor, add the building code and/or the floor number to the code and name as a suffix.
7. Click the Link tab.
8. Click the Add Link hyperlink.
9. Select which Level you want to associate this program from the upper right list.
10. Select which Type of item you are looking for from the list in the upper left.
11. Find the item you want to add from the list at the bottom.
12. Select the item.
13. Click the Add Selected button.
14. Repeat until all items are added to the list.
15. Click the Cancel button to close the Item selection window.
16. Click Save on the Toolbar to save the record.

Useful Links: [Back to Process Flow](#)

**Linking Programs**

*Path: Organization > Lookups > Custodial Program*

1. Find the Program you want to use.
2. Click Edit on the Toolbar.
3. Go to the Link Tab.
4. Click Add Link.
5. Select the Level you want to apply to the Program in the upper right.
6. Use the list at the bottom to select and the list in the upper left to filter.
   Note: Users can utilize additional filters by using the Tag or Description filter in the upper right of the Item Entry window.
7. Click the Add Selected button at the bottom after selecting all the items you want to apply the program to.
8. Click the Close button if no more items are needed.
9. Click Save on the Toolbar to save the Program

Back To Custodial Processes

Template
Templates are copies of the Matrix.

Path: Transactions > Custodial > Custodial Template
1. Go to Organization > Custodial > Custodial Matrix.
2. Find a Custodial Space Type to copy.
3. Click Create Custodial Template from the Action Menu in the left pane.
4. Enter a Template Description.
5. Select a Custodial Program.
6. Adjust any task items by either editing them or deleting them from the list.
7. Click the Plus to the left of the line to expand the list
8. Click Add Shift to assign a shift to the task.
9. Select the Shift in the Shift Frequency window.
10. Select which level you will be using.
    Note the Task Frequency assigned to this Task and Level.
11. Select the days of the week appropriately. (Example: If the frequency is 3 time a week, you should select which 3 days you want this task to occur by default.
12. Select the Lock Days option if the task has to remain on the days selected.
13. Click Save at the bottom to save the shift assignment.
    Note: if the frequency was 2 times a day, then add an additional line for the same shift or another to allocate the multi-frequency assignment per day.
14. Make the necessary adjustments if adding additional shift or different days for another shift.
15. Click the Save button’s down arrow on the right of button.
16. Select Save and Close.
17. Review shift assignment.
18. Click Save on the Toolbar to save Template.

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Custodial Scheduling

*Path: Transactions > Custodial > Routine Assignment*

1. Click Add on the Toolbar.
2. Enter a Description (Profit Center Code + “-“ + Route number or name).
3. Select the Supervisor who is assigned to this assignment. (This will be used for inspections.)
4. Select the Shift of the assignment. (This is the shift that is linked to Matrix shift assignment.)
5. Select the Custodian who is assigned to the route.
6. Click the Add Area link in the list.
7. Select All Area Types from the list on the left unless you are looking for specific area types.
8. Select the Building you want to start with from the list on the right. A list of all Custodial rooms is listed in the area list at the bottom.
9. Go through the list and select all areas that apply. Note the amount of time at the bottom of the list and add until the total time equals a full week’s worth of work for this custodian.
10. Click the Add Selected button at the bottom to add all selected areas to the route list.
11. Click the Close button at the bottom to close the Item Selection window.
12. Review the Route Assignment.
13. Click Save on the Toolbar to save the route.

Back To Custodial Processes

Printing Master and Employee Schedules

*Path: Transactions > Custodial > Routine Assignment*

1. Open the Route Assignment window using the path listed above.
2. Find the Route you want to print.
3. Click the down arrow on Print on the Toolbar.
4. Select Options. From the list you will see multiple print options.
5. Double-click either the Master Schedule or Master Schedule - Employee Report.
6. Select HTML as the output.
7. Use this login: User=aramarkreports Password=report$38619. The master schedule will run automatically, but you will have to select an employee for the employee report.
8. Click the Review button in the upper right of the window.
9. If you want to Print, click the Printer icon.
   Or,
10. If you want to Export, click the disc icon down arrow and select the format.
11. Select Save and a location.

Back To Custodial Processes

Custodial Projects

Project Assignment

Path: Transactions > Custodial > Project Assignment

1. Click Add on the Toolbar.
2. Enter a Project Description (Profit Center Code + “-” + Project number or name).
3. Select the Supervisor assigned to this assignment.
4. Select the Shift of the assignment.
5. Select the Custodian or Crew assigned to the Project.
6. Click the Add Area link in the list.
7. Select All Area Types from the list on the left unless you are looking for specific area types.
8. Select the Building you want to start with from the list on the right. A list of all Custodial rooms is listed in the area list at the bottom along with the Audit Item Type and Sub Type.
9. Go through the list and select all areas that apply to the project.
10. Click the Add Selected button at the bottom to add all selected areas to the area list.
11. Click the Close button at the bottom to close out the Item Selection window.
12. Select an Area.
13. Click the Apply Schedule Date hyperlink to set start and end dates of the area project. Note the time for the task.
14. Set the Work Order Defaults that will be used later to construct and build work orders.
15. Click Save on the Toolbar to save the Project.

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Converting Custodial Project Items into Work orders

Path: Transactions > Custodial > Project Assignment

1. Find the Custodial Project you want to convert Project Items to Work Orders.
2. Click Edit.
3. Click the + sign next to the Area you want to assign the WO defaults to.
4. Click the Add History hyperlink.
5. Enter the Start and End dates.
6. Add Profit Center.
7. Set the WO Type.
8. Set Priority.
9. Enter Task.
10. Set Trade.
11. Click Save to save defaults.
12. Click Save on the toolbar to save the Project Assignment.
13. Click each area line that you want to convert to a work order.
14. Click Convert Selected to Work Order.
15. Wait until you receive confirmation that all select lines have been converted.

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Custodial Project Gantt

Path: Transactions > Custodial > Custodial Project Gantt

1. Select the Start Date you want the Gantt to start.
2. Set the Shift that is assigned to the projects you want to view/adjust.
3. Set the Supervisor related to the projects you want to adjust.
4. Click Save to build a list of all projects and project items.
5. Click-and-Drag the boxes to adjust Area Assignment (Project Items) as needed.
6. Click the Save button in the upper right of window to save new schedule dates.

Labor Estimating

Path: Transactions > Custodial > Labor Estimates

If you open the window and click Calculate, the system will calculate all known assignments based on user access for all tasks.

1. Select Client to filter for a specific Client.
2. Select Client then Building to filter to a specific Building.
3. Select a Shift to only filter tasks associated with a specific shift. (Note: Calculations are based on task frequencies, not shift assignments.)
4. Select Supervisors to filter to just supervisory shift assignments.
   All Tasks brings in routine and project items.
   Routine only brings in Routine Matrix task items that have Shifts assigned.
   Projects only displays Project Tasks with Shifts assigned.
   Current Assignments will only pull from active schedules. If a location is not scheduled but it is within the routine task assignments, it will not show in these numbers.
5. Select Program to pull just this group of Template Programs to see estimate numbers.
6. Click the Calculate button to process the request.

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Inspections

Custodial Inspections

Path: Transactions > Custodial > Inspections
1. Click Add.
2. Enter the Supervisor.
3. Select the Inspector. (These are Users who get the inspection form on their mobile.)
4. Quantity. (This is the every X record that the system will transfer to the mobile.)
5. Click the Add Route hyperlink in the list.
6. Select all routes that need to be on the inspection.
7. Click the Add Selected button to add all routes to inspection list.
8. Click Save on the Toolbar to save the inspection record.

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Custodial Inspections – Add Set based off Route

Path: Transactions > Custodial > Inspections
1. Find the Inspection you want to process.
2. Click Edit on the Toolbar.
3. Go to the Results tab.
4. Click Add Set.
5. Click Save to save the set with date and time of creating.
6. Put a check in the Sync box to pass inspections to the mobile.
7. Click Save on the toolbar to save the record and values.
Custodial Inspections – Add on the Fly

Path: Transactions > Custodial > Inspections

To add locations on the fly:
1. Find the Inspection you want to process
2. Click Edit on the toolbar if only specific locations.
3. Change the Qty count to 0.
4. Go to the Results tab.
5. Click Add Set.
6. Click Save to save date and time.
7. Click the plus sign to the left of the set.
8. Select the Add Location on the Fly Hyperlink.
9. Select the Location or select Client, Building, Floor and Area to get the Location to populate.
10. Click Save to save Area record to add to the Set list.
11. Repeat steps 7-10 until all additional areas have been added.
12. Put a check in the Sync box to process the Set to mobile device.
13. Click Save on the Toolbar to save the record.

Custodial Inspections – Entering Inspection Feedback

Path: Transactions > Custodial > Inspections
1. Find the Inspection you want to process
2. Click edit on the toolbar
3. Go to the Results tab
4. Click the plus sign to the left of the Set you want to record feedback to
5. Click the + sign next to the area record you want to update
6. Click the Pencil to enter reading
7. Select the Rating and enter notes if needed
8. Click the Update hyperlink to save the rating
9. Repeat steps 6-8 until all items for that room have been updated
10. Click the – sign to collapse the list for the area
11. Repeat steps 5-10 until all areas have been updated
12. Once all areas have been processed, click the Save button on the Toolbar to save the record.
Utilities

Meters

*Path: Organization > Utilities > Meters*

1. Click Add.
2. Enter a Meter code (meter code + “−” + Client ID).
3. Enter Meter Description (Description + “−” + meter code + “−” + Client ID).
4. Select Client Name.
5. Select Building.
6. Select Floor or Area if the meter provides utilities to these levels only.
7. Uncheck Chargeable.
8. Select Meter type.
9. Select Service Type.
10. Select Parent Meter if applicable.
    If tracking meter readings continue, else skip to 13
11. Enter Roll Over Count.
12. Enter Digits.
13. All other fields are optional (update as needed).
14. Go to the Repair Center Tab.
15. Click on the Add Repair Center Hyperlink.
16. Select all Repair Centers that apply.
17. Click the Save button at the bottom of the window.
18. Put a check in the Preferred box for the Repair Center that will be used as the Default.
19. Click the Serviced Locations tab.
20. Click Add Location.
21. Select a Client.
22. Select a building that this meter services and provide percentage.
23. Click the Save button.
24. Repeat 18 and 19 until all buildings are entered.
25. Click the Auto Distribution hyperlink if you want to auto-distribute the percentage.
26. Click Save on the Toolbar to save Meter record.

*Back to Utility Processes*
**Tickets**

*Path: Organization > Utilities > Utility Ticket*

1. Click Add.
2. Select Utility Meter.
3. Select Vendor.
4. Select a Repair Center if applicable.
5. Enter Vendor Account (wait until account name appears before proceeding)
6. Enter the correct start date of the bill
7. Enter the correct end date of the bill
8. Enter Utility Usage.
9. Enter Demand if applicable.
10. Enter Demand Units if applicable.
11. Enter Charge amount for this meter.
12. Click Save on the Toolbar to save record.

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**Ticket - Accounts Payable Invoice**

The Accounts Payable Invoice allows you the ability to combine multiple tickets onto one invoice and also apply additional charges that may or may not be directly related to a meter.

*Path: Organization > Utilities > Utility Ticket*

1. Find the Utility Ticket that you want to apply an AP Invoice to.
2. Click the Create AP Invoice option in the Action Menu on the left.
3. Select Vendor.
4. Select Vendor Account.
5. Select Repair Center if applicable.
6. Enter a PO# if applicable. The current Ticket info should default into the charge list at the bottom.
7. Click on Add Detail line if you need to add additional charges. For adding additional meters to this AP invoice continue, else proceed to step 12.
8. Select a Meter.
9. Select a Ticket number. Note: Users cannot add a ticket that has already been applied to another AP invoice.
10. Click Save to save the Meter info to the detail line and repeat steps 9-11 until all Tickets have been added.
11. Select the Other radio button at the top of the AP Invoice Detail Entry window.
12. Enter Description.
13. Enter Start and End Date. This should match the billing period of tickets on the AP.
14. Enter usage. (If this is a single charge, use 1, else enter quantity.)
15. Enter the Unit. (If this is a single charge, use Each, else enter a unit that applies.)
16. Enter Total charge to be applied.
17. Click Save to add Other Charge to your detail lines.
18. If all cost has been added and this invoice has been paid, mark the paid option in the upper right.
   Note: Once this is marked and saved, you cannot modify this record except for comments.
19. Click Save on the Toolbar to save your AP.

Print/Export Energy Data

Path: Organization > Utility > Utility Ticket
1. Open the Utility Ticket window using the path listed above.
2. Click the down arrow on Print button on the Toolbar.
3. Select Options. From the list you will see multiple print options.
4. Double-click on the line with the Report or Export format you require.
5. Select HTML as the output.
6. Use this login: User=aramarkhreports Password=report$38619.
7. When the report comes up, complete the criteria at the top to filter the report.
8. Once done, click the Review button in the upper right of the window.
9. If you want to Print, click the Printer icon.
   Or,
10. If you want to Export, click the disc icon down arrow and select the format.
11. Select Save, then select a location to save the file.
12. Back to Utility Processes

Weather
This window is used to track the temperature for each day per weather station

Path: Organization > Utility > Weather
1. Find an existing Weather station reading for year and month, else proceed to step 4.
2. Click Edit to modify or add readings – Proceed to step 6
   For New Year and Month Entries
3. Click Add on the Toolbar.
4. Select which station will be used.
5. Enter the Fiscal Year.
6. Enter the Month.
7. Click the Add New Record hyperlink at the top of the list.
8. Enter the day of the month.
9. Enter the Heating Degree if applicable.
10. Enter the Cooling Degree if applicable.
11. Click Update to apply.
12. Repeat steps 7-11 until all reading have been entered.
13. Click Save on the Toolbar to save the record.

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Keys

Path: Material > Keys > Records
1. Click Add on the Toolbar
2. Select Lock Shop
3. Enter Key Number
4. Enter Key Descriptions
5. Select Key Type
6. Enter Repair Center
7. Enter Manufacturer (Optional)
8. Enter Key Way (Optional)
9. Select Parent if this key has a Master (Optional)
10. Enter Key Stamp (Optional)
11. Enter Key Symbol/Level (Optional)
12. Indicate if the key is serialized. No by default.
13. Click Save on the Toolbar to save

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Key Quantities

Path: Material > Keys > Records
1. Find the key record you want to modify.
2. Look in the Action Menu on the left to determine what quantity options are available for this key.
3. Select either Create, Destroy, Lose, or Find and enter a quantity
4. Click the OK button to save.
   Once saved, all quantities for that key adjust and reflect the changes at the bottom
   of the Identity page.

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Key Rings

Path: Material > Keys > Key Rings
1. Click Add on the Toolbar.
2. Enter a Key Ring number.
3. Enter a Key Ring Description.
4. Enter a Repair Center.
5. Add Comments as needed.
6. Click the Save on the Toolbar to save the record.
   To add keys:
7. Go to the Key tab in view mode.
8. Click the Add Key hyperlink in the key list.
9. Select the key and quantity, provide a serial number if serialized.
10. Click the Save button at the bottom of the window to save the key to the ring list.
11. Click the Cancel button to close the Key Entry window. All key entries should be
    listed.

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Key Locks

Path: Material > Keys > Key Locks
1. Click Search on the Toolbar.
2. Enter the room number or location ID of the room you want to associate a key to.
3. Click Find.
4. Look through the list and double-click the room you want to assign a lock.
5. Click Edit on the toolbar.
6. Click on Add Key Lock hyperlink.
7. Select the Key.
8. Lock Manufacturer (Optional).
9. Lock Model Number.
10. Lock Type.
11. Comments.
12. Click the Save button at the bottom to save lock information
13. Click the Cancel button to close window after entering all locks associated with that room.
14. Click Save on the Toolbar to save the record.

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Key Holders

Path: Material > Keys > Key Holders
1. Click Add on the Toolbar.
2. Select Employee ID or enter a key holder ID (Profit Center number + unique ID) 15 digit max.
3. Enter First Name.
4. Enter Last Name.
5. Select Repair Center.
6. Enter Position (Optional).
7. Enter Phone Number (Optional).
8. Select Department (Optional).
9. Enter Comments (Optional).
10. Click Save on the Toolbar to save the record.

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Issue Keys

Path: Material > Keys > Key Holders
1. Find the Key holder you want to issue to.
2. Go to the Key or Key Ring tab.
3. Click Issue or Add key ring.
4. Select Key, if serialized you are prompted to enter serial number.
5. If Key, enter the quantity issued.
6. Change Issue Date (Optional).
7. Enter Return Date if applicable.
8. Click Save at the bottom of window to save transaction.
9. Click Cancel after you have issued all keys.

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Events

Creating Events

_path: Transactions > Events > Records_

1. Click Add on the Toolbar.
2. Enter Event Code. (Site specific ID + + last 4 of Profit Center number)
3. Enter an Event Name.
4. Select or enter Type Description.
5. Enter Start Date.
6. Enter End Date.
7. Complete any of the additional fields available.
8. Click on the Profit Center tab.
9. Click on Add Profit Center.
10. Select all Profit centers that apply.
11. Click the Save button at the bottom of the window.
12. Click Save on the toolbar to save the Event.

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Accepting and Rejecting Events

_path: Transactions > Events > Records_

1. Go to Transactions > Events > Event Browse.
2. Change the date to a date for this month or next.
3. Select Monthly list from Result Layout.
4. Set the Other option in the lower right of window to Pending Events.
5. Click the List Events button at the bottom of the window. A list of Pending requests is listed for that month
6. Select a line by clicking on it.
7. Click the Zoom to Highlighted button at the bottom of screen.
8. Review, and if acceptable, click the Accept or if not the Reject button in the lower right of the window.
9. Wait for the screen to refresh and you should see an Accepted/Rejected confirmation with Accepted/Rejected by and Date populated.

NOTE: If rejected, add text in the Reason field stating why the event request was turned down.
10. Close the window by clicking the X in the upper right of the window. You should
now be back at the Browse window and the list is the same.
11. Put a check into the box on the left of the line you just accepted.
12. Click the Remove Selected box at the bottom of the window.
13. Repeat steps 7-14 until all Events for that month have been processed.

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Converting an Event to a Project

Path: Transactions > Events > Records

1. Find the record you wish to convert to a Project.
2. Validate the Event has been accepted. If so, you have the option to Convert in the
   Accepted box in the lower right of the window.
3. Leave the selection at Project.
4. Click the Convert button.
5. Change the Project Name to: Site Specific Project Name + - + Last 4 of the Profit
   Center Number
6. Enter or select Type.
7. Enter or select Sub Type.
8. Enter or Select Requestor.
9. Complete any other optional fields as needed.
10. Click Save on the toolbar to save the record.

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