



Quick Start Guide

This guide is intended to help you through the very initial phases of launch. It is by no means a complete reference. Refer to the online help on each screen for more details and do not hesitate to contact support at (888) 333-4617 x2 if you have any questions or concerns.

Work Order Statuses

Select Work Orders, then Statuses. By default, you have: "0- Open", "1- On Hold", "2- Closed", and "3- Cancelled". It is recommended that you keep these statuses as they work with the library of reports that have already been created. You can change the "0- Open" to just "Open" or such. The number prefixes are used in different sections to assist with the sort order on different screens. In this case 0- Open will be the default on many screens whereas Cancelled might be otherwise.

Work Order Priorities

Similar to Work Order Statuses, no need to change them unless you really want to.

Work Order Types

Two basic types are setup by default: Corrective Work, and Preventive Maintenance. Some people use these but you can add and change this list to have whatever you want for reporting and management purposes. To edit an item on the list just click the description. To add a new one click Add on the top menu. If you check "Include in the Catalogue of Services", this work order type will appear as an option in an online catalogue of services for your customers. It is recommended that you select "Work Order Title", "Work Order Location", Include and Require "Name" and "Email Address" for a typical service request. Once a catalogue of services is established customers can reach it by go to:
yourname.eWorkOrders.com/servicecatalogue.asp

Asset Areas

This is a list of areas where your assets reside. These can be buildings, campuses, sections of town, departments, anything you want.

Asset Categories

This is a list of categories for organizing your assets. These could be: HVAC, vehicles, pumps, fire hydrants, buildings... Anything you need.

Asset Criticalities

This is mostly used in the Pharmaceutical and Food Industries for things relating to FDA compliance, but can be used to identify different levels of criticality for different assets.

Employee Payroll Items

Default items are in the list. Feel free to add and edit these to meet you needs. These are not used by most customers.

PMs

In PMs Management add page, the Work Order Setup tab basically corresponds to fields that will be found on the work order that is generated, though the PM Number can be anything you want. On the Asset Setup tab, the top boxes are for selecting an area and an asset in that area. Press the "PM This Asset" button to add the asset to the PM Asset List. Each asset in the list has it's own set of tabs below. Most people just use the Scheduling tab to Add Schedules. There is detailed help on this section (and every section) when you are on the add or edit page located in the Online Help file (top right corner), be sure to click the "more..." button at the bottom of the help pages.



Workstation Configuration

Browser Settings

There are several browser settings needed on any workstation that will be using eWorkOrders.

Disable your pop-up blocker

In Internet Explorer, select Tools/Pop-up Blocker/Pop-up Blocker Settings. Enter "infopros.eworkorders.com" in the Address of website to allow box. Press the Add button. Enter "***mysite***.eworkorders.com" in the Address of website to allow box. (Replace *mysite* with the subdomain name you selected for your website. Press the Add button. Press the Close button.

Also, be aware that third party software may contain pop-up blocking capability and need to be updated. This includes programs like Yahoo! Toolbar, Google Toolbar and others.

Internet Explorer Settings

Enable error messages - In Internet Explorer, select Tools/Internet Options. Click on the Advanced tab. Scroll down to the Browsing section and find the line that says "Show friendly HTTP error messages". Uncheck this box. Press the OK button.

Compatibility View Settings - In Internet Explorer, select Tools/ Compatibility View Settings. Enter "eworkorders.com" in the "Add this website:" box. Click the "Add" button. eworkorders.com should appear in the "Websites you've added to Compatibility View:" box. Press the Close button.

Printing Work Orders and Reports

If your work order or report is getting cut off when being printed, the margins in Internet Explorer are set too large. To adjust the margins, do the following:

Go into Internet Explorer, select File/Page Setup from the menu. Set all of the margins to 0. Press OK. Internet Explorer may automatically change the 0 to a small number such as 0.166 or when you press OK it will ask you to "Fix" the margin sizes. You should allow this to happen or press Fix.

If you want the barcode to show up on the printed work order then you need to install the Bar3of9.ttf font. You can download this font from <http://www.eWorkOrders.com/downloads/BAR3OF9.TTF> Save this file on your computer (choose a location you remember). Then you need to load this file into your system's fonts area. To do this press Start, Settings, Control Panel, double click on the Fonts folder, then from the menu choose File, Install New Font. Select the appropriate drive letter, then select the appropriate folder, then click on the font in the list of fonts and click OK.

Automatically updating the "Printed" field

This field on the work order should automatically update when the print option is selected and you say "OK" to "Press OK if the printing was successful." If it does not update properly then you need to disable your pop-up blocker from blocking your eWorkOrders site. See Disable your pop-up blocker instructions above.



Other Configuration Items & FAQs

Uploading Employee Pictures

If you are going to upload the pictures of employees you should edit the pictures to be no larger than 240 pixels wide x320 pixels high prior to uploading them. Pictures should be less than 100KB in size.

Create a shortcut on your desktop for eWorkOrders

Internet Explorer, Chrome, Edge or Opera must be your default browser for this to work properly. Right click on your desktop and select New then Shortcut. Enter the name of your site (ie: <https://YourOrg.eWorkOrders.com>) in the "Type the location of the item:" box. Click the Next button. Enter "eWorkOrders" in the "Type a name for this shortcut:" box. Click the Finish button.

My Work Orders

If you are logged in and you do not see the work orders that you are assigned to work on in the My Work Orders section, then you must go into employee management, edit your employee record, update the User field with the User ID that you use to log in to eWorkOrders, then press save.

Creating a Home Screen Shortcut on Your Mobile Device

Email your mobile login link to your mobile devices and click on the link in your email.

On an Apple Device:

- Open the login page in Safari.
- Click the "Share" icon (a box with an arrow pointing upwards) at the top of the browser.
- Click the "Add to Home Screen" button.
- You can rename the Shortcut at this point. When done click Add.

On an Android Device:

- Open the login page in Chrome.
- Click the three vertical dots in the top right corner of the screen.
- Select the "Add to Home" screen" option.

Setup login page as the default page in the browser

To setup the login page as the default page in the browser you must do the following:

Internet Explorer - Open internet options or click Tools then Internet Options in the file menu. Go to the General Tab and type in your login page inside the, "To create home page tabs, type each address on its own line." textbox or simply click the Use current button if you are already on your eWorkOrders login page. Then click the OK button.

Google Chrome – Go to Settings then in the "On startup" section click the radio button that reads "Open a specific page or set of pages" then click "Set pages". Type or paste your eWorkOrders login page URL in the "Add a new page" textbox and then click OK.

Data Imports

There are a number of import utilities that can be found in the Settings/Report Management section. There is also a spreadsheet you can download with the standard import templates. These standard templates do not include any user fields. If you have any user fields setup or plan on using them during your import process, then you will need to download the template from the specific import program. Download the standard import templates from: <http://www.eWorkOrders.com/downloads/Import-Templates.xlsx>

Other FAQs

There are other important FAQs that are very helpful for new users and are updated in a regular basis. When logged into eWorkOrders press the Help in the top right corner. If you are not on the Table of Contents, then click on the Contents link at the top of the page. Tips, How Tos & FAQs are listed at the top.