Sprocket CMMS

User Guide

Contents

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1.0 Sprocket 3.5 Overview

1.1 What is Sprocket?

Sprocket is a work management application that provides an easy-to-use interface with the flexibility to customize the work management processes to meet your operational processes. This user guide is

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designed to provide an overview training of the features and functionality. This user guide is a step-by-step guide that will walk you through the general work management features of Sprocket 3.5.

1.2 What will I learn from this user guide?

The following modules will be covered in this user guide:

- **Work Management**
  - Creating Work Orders
  - Editing Work Orders
  - Viewing Work Orders
  - Submitting Estimates
  - Time and Materials
  - Work Order Details
- **Time and Materials**
  - Posting Time and Materials
  - Editing Time and Materials Postings
  - Deleting Time and Materials
- **Inventory Management**
  - Purchase Request
  - Inventory Item Checkout
  - Physical Counts
- **Inspections**
  - Inspection Manager
  - Conducting Inspections
  - Submitting Results

2.0 Getting Started with Sprocket

2.1 System Requirements

Sprocket 3.5 requires the following system settings:

- Computer Process or 1 (GHz) or greater
- Memory 2 GB or greater
- Monitor Resolution of 1024 x 768.
- Username and Password provided by your Sprocket System Administrator

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2.2 Accessing Sprocket

Sprocket is accessed using one of the following browsers:

- Internet Explorer 8
- Mozilla Firefox
- Opera
- Google Chrome
- Safari

Note: Popup Blockers may interfere with Sprocket. You should disable your popup blocker when accessing Sprocket.

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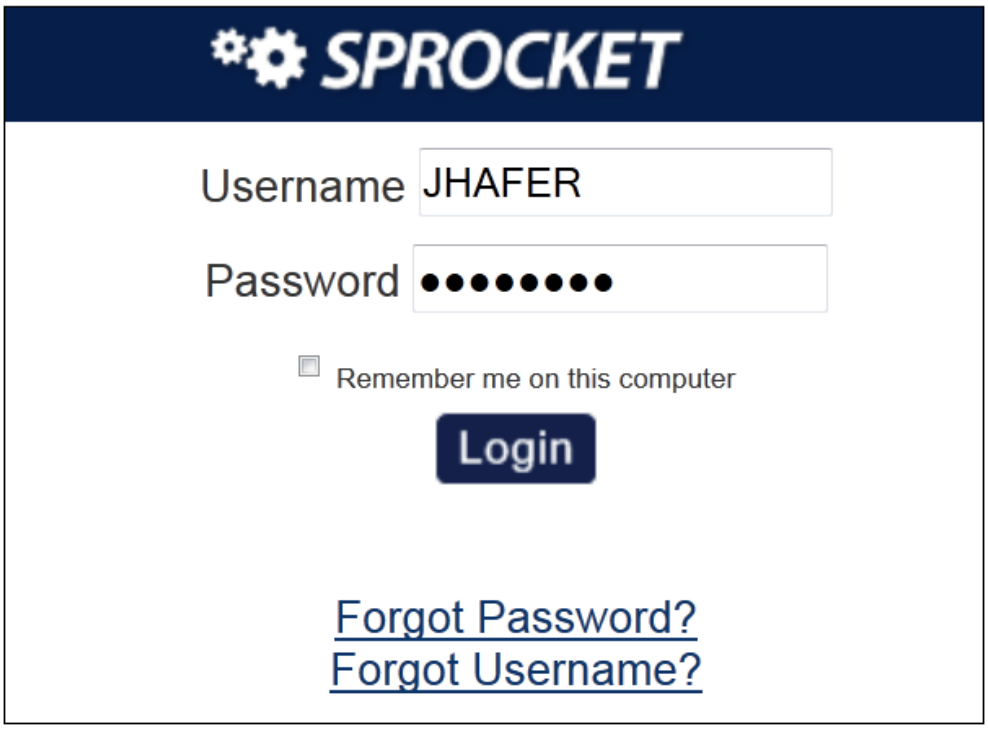

Remember me on this computer:

When this box is checked, Sprocket will not require Username or Password the next time you return from the same computer. Do not click Logout or Username and Password is required each time. Close the window or browser to stay logged in.

Forgot Password?:

Use this Link if Password cannot be remembered. Password reset link is emailed to user email address once the Challenge Question has been answered correctly. This information is stored on the People record, under the Additional tab.

Forgot Username?:

Use this link if Username cannot be remembered. Enter Email address, and username will be sent via email.

Once you have entered in your user name and password, select the ***Log In*** button to enter Sprocket.

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3.0 Sprocket Features

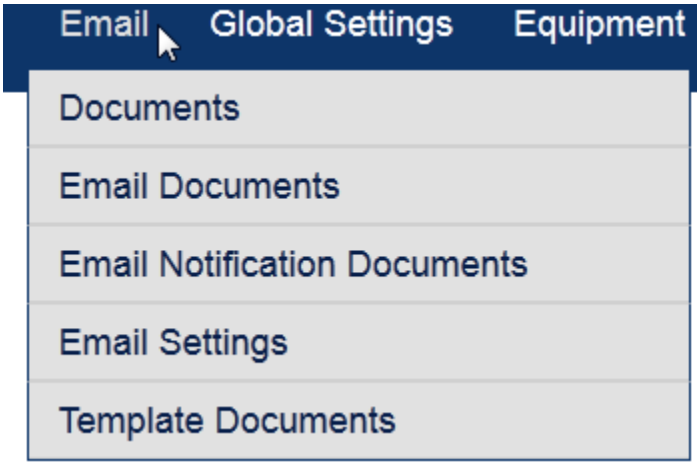
3.1 Sprocket Navigation

Sprocket modules are sectioned into three categories: *Consoles*, *Tabs*, and *Screens*. When you first log into Sprocket, the *Sprocket Portal* tab is displayed under the *Work Management* console. If you hover your cursor over the tabs, a menu of screens will be displayed.

Consoles:

Tabs:

Screens:



Note: Sprocket customizes screen settings based on customer needs. Your screen may or may not display the above Consoles, Tabs, or Screens. Contact your Sprocket Administrator with questions.

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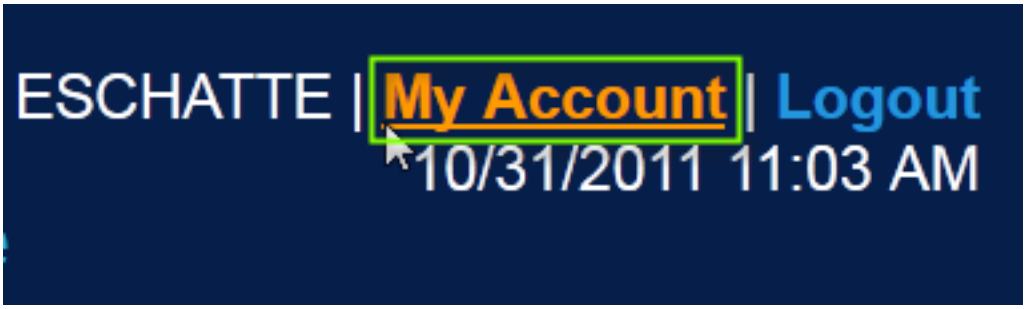
You will use these *Consoles*, *Tabs*, and *Screens* to navigate through Sprocket. Simply select the desired *Console*, *Tab*, then *Screen* to navigate to the desired page.

3.2 Sprocket Screen Header

The heading at the top of the screen displays current information such as the current logged in user, today's date, and the current time. This also displays the buttons you use to log out and adjust account settings.

3.2.1 Account Settings

Next to the logged in user's name, click the ***My Account*** button to change account settings.



Clicking this link will bring you to the ***My Account*** form where you can change information such as password or add additional information such street address.

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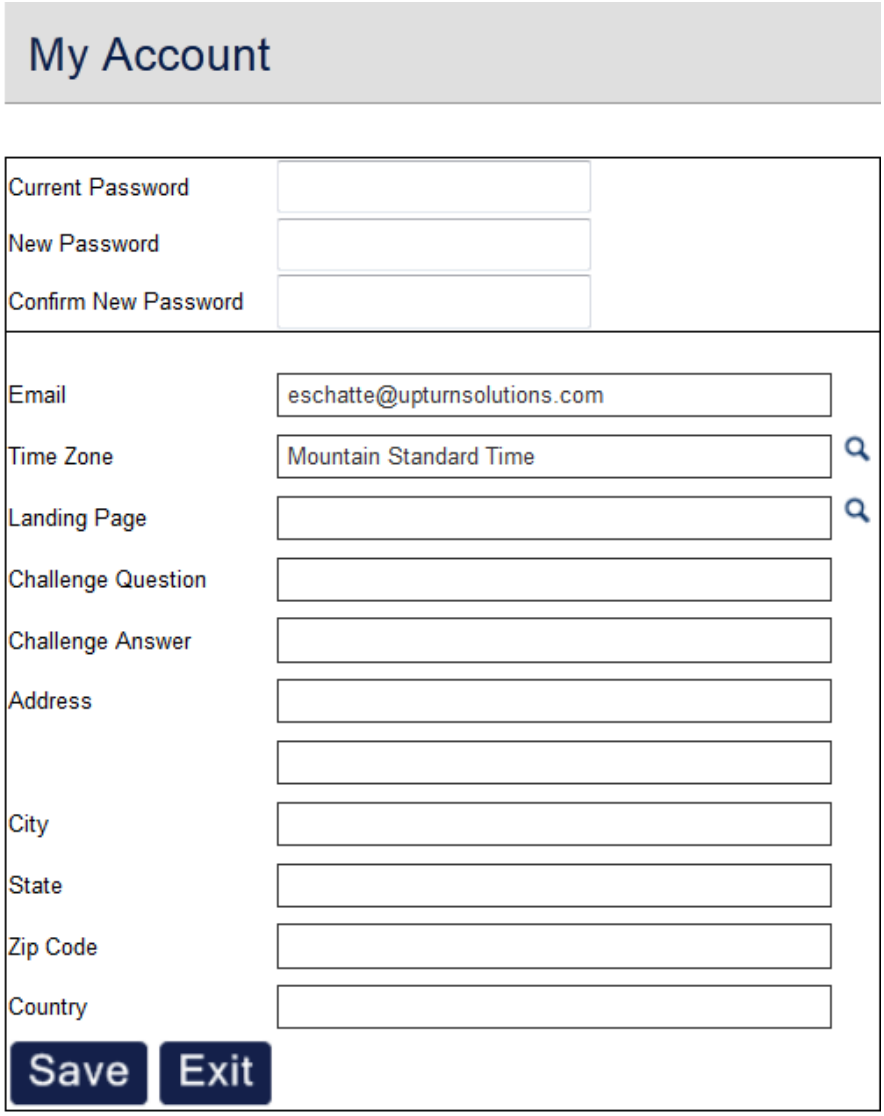

Notice that to the right of the *My Account* form, there is an additional window where you can add New Contact Information. Click the New Contact Information link to add additional information to your user account.

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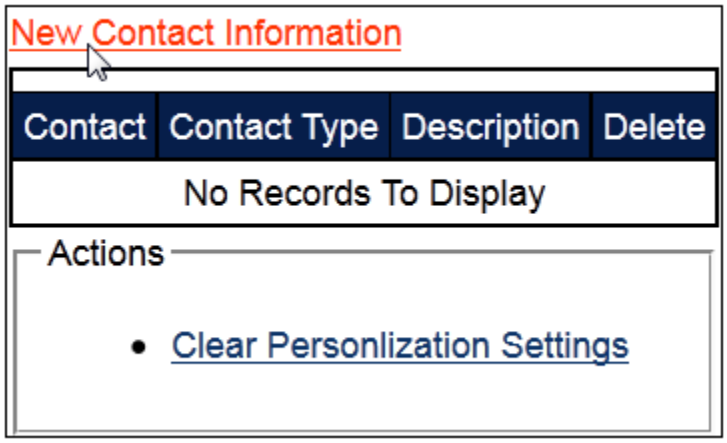

A form will appear for you to enter in your additional contact information. Use the fields in this window to enter in your additional contact information.

Notice that the ***Auto Lookup Tool*** is displayed to the right of the *Type* field.

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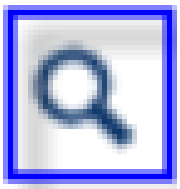
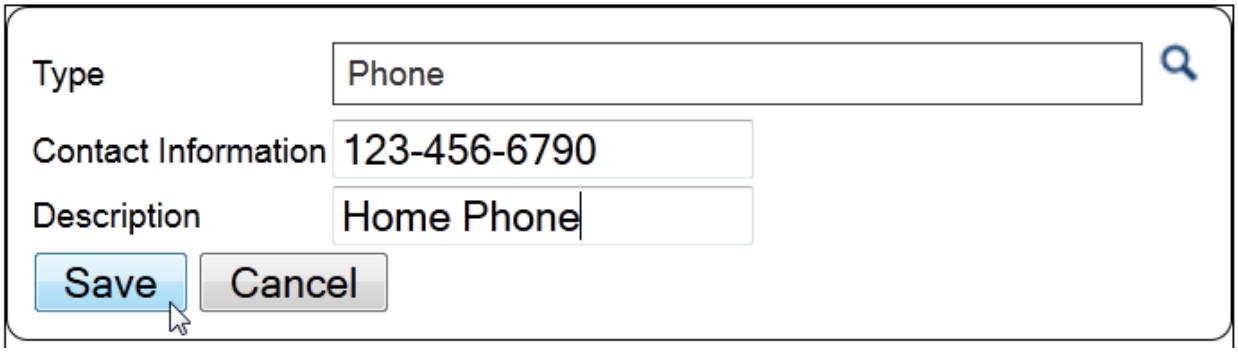
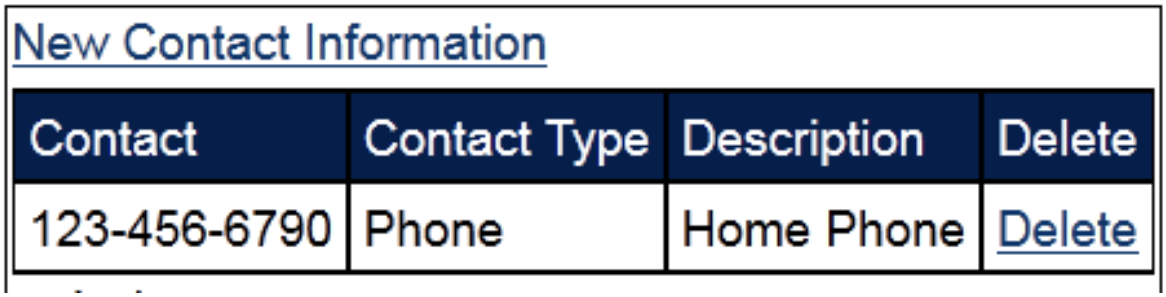


This indicates that this field allows you to search Sprocket for specific records using this function. The Auto Lookup Tool will be described in greater details in the next section.

Once you have entered in all of your new contact information, click the *Save* button to save this to your account record. If you do not wish to add additional contact information, click the *Cancel* button to return to the previous screen.



The page will refresh and a grid will appear that displays your updated information.



You can add other types of contact information by clicking the *New Contact Information* button at the top of the grid at any time. If you ever wish to remove any type of contact information, locate the row you wish to remove and click the *Delete* link at the far right of the grid.

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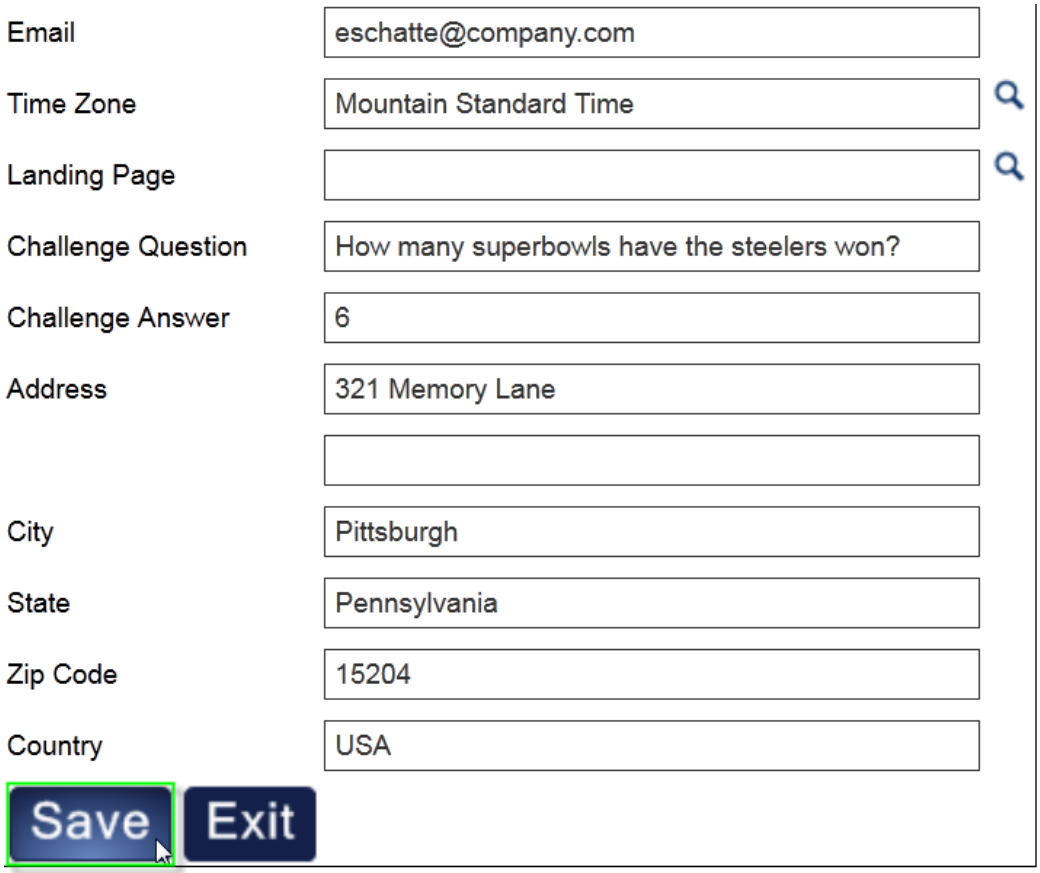
Once you have updated your user account information, click the ***Save*** button at the bottom of the page to update your account.



A window will appear saying ***Success***. Click ***OK*** to continue.

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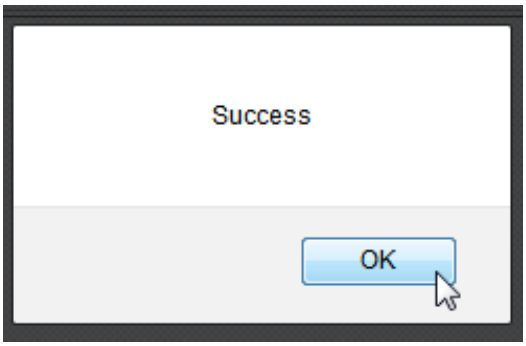
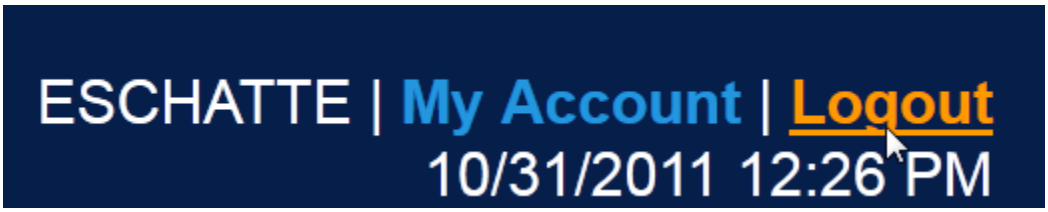


Now that your account settings have been updated, click the *Exit* button at the bottom left of the page to return to your main screen.

3.2.2 Logging Out

Along the header of the Sprocket main page is the log out button located in the upper right hand corner of the page. Click here when you wish to log out of Sprocket. This will return you to log in page where you can enter you user name and password to log back into Sprocket.



3.3 Auto Lookup Tool

Throughout Sprocket, you will notice that ***Auto Lookup Tool*** icon next to certain fields when entering information into a form or when searching for information.

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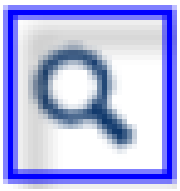
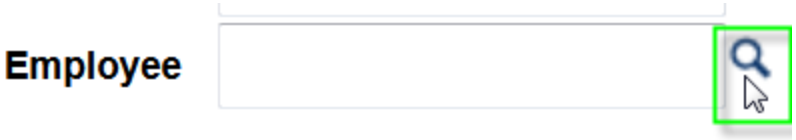


When this function is available, it indicates that you can use it to search for specific records. This tool can be used in a number of ways. Let's say you are searching for a particular *Employee* in Sprocket. One way the *Auto Lookup Tool* can help you locate the account would be by simply clicking the *Auto Lookup Tool.*



A window will appear displaying all possible employee records. Notice the fields at the top of the page. You can enter in additional filters to narrow down your search.

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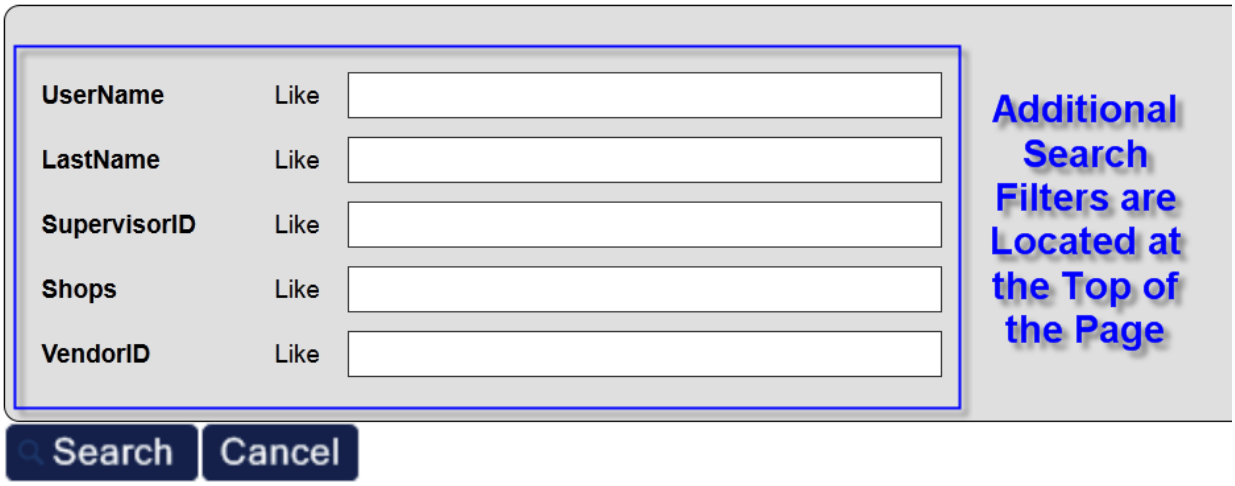

1 2 3 4 5 6 7 8 9 10 >>

UserName	FirstName	LastName	LocationID	SupervisorID
AAMEEN	Asif	Ameen		BLUND
ACARRILLO	Alejandro	Carrillo		MRAMEY
ACHARLEY	Albert	Charley		DDOZIC
AEGBERT	Alma	Egbert		KLUND
AGONZALES	Antonia	Gonzales		MRAMEY

From here you can scroll through the pages to select the desired employee or use search criteria above to narrow search results. If you use the search criteria fields above, enter in all or part of the name and click the ***Search*** button at the top left of the grid. You may also *click* Cancel to return to the previous screen or click the red *X* at the top right of your screen to exit out of the search.

Another way to use the *Auto Lookup Tool* is to simply click inside the text field. A list will appear displaying the top ten records for this category.

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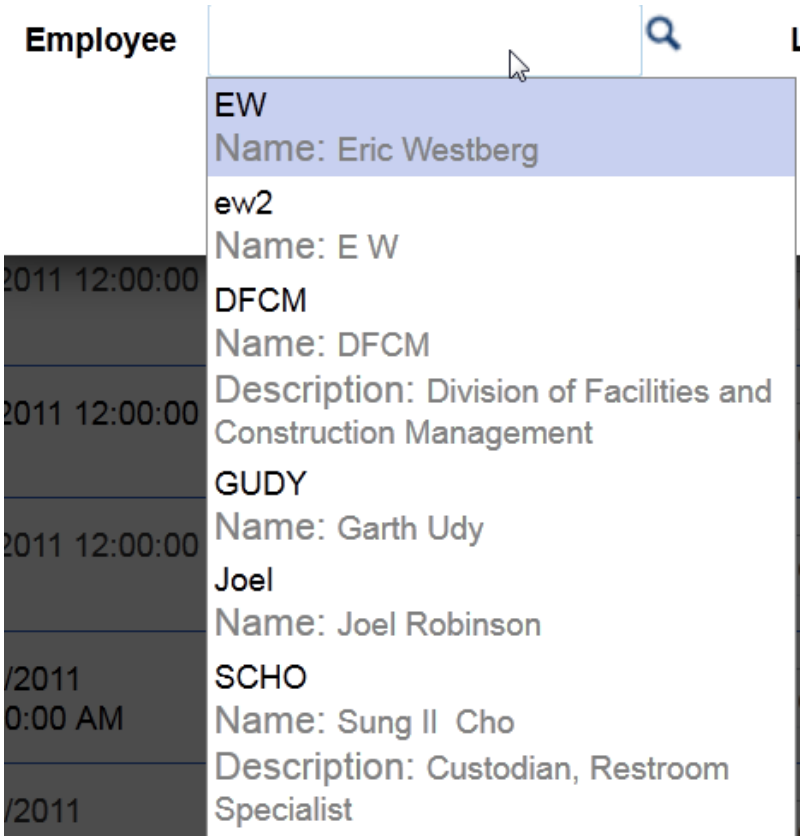

If the desired record still does not appear, click the *Auto Lookup Tool* icon to return to a list of all possible records and search for it there.

Another way the *Auto Lookup Tool* can help locate records is through an autocomplete function. This means that if you begin typing all or part of the name of the record you are searching for, the *Auto Lookup Tool* will return the search results with the same name as what was entered. For example, if you are looking for a record with the user name *JSTEVENS*, you could type in all or part of this name to locate the proper record. If you type in ***JSTE*** into the field, see what results appear.

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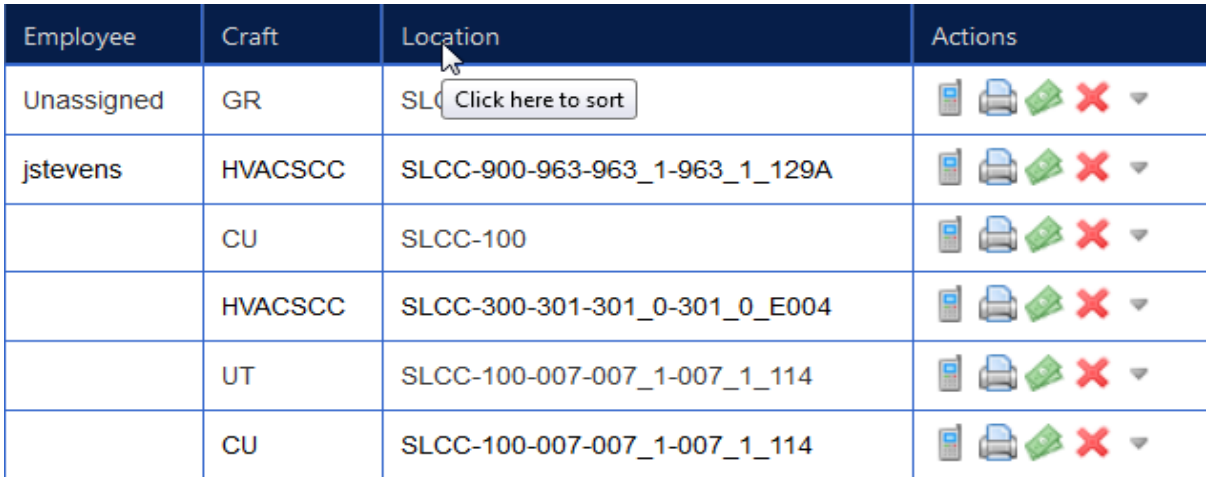
Notice that the record returns displaying the user name with that same lettering sequence that you entered in. To select this employee, click the window that appears below the *Employee* field and the full user name will be populated into the field.

Now that you know how the *Auto Lookup Tool* works, you can use it to your advantage when searching for records in Sprocket. As you learn how to navigate Sprocket, you will you use search function more frequently to view search results.

3.4 Sorting Records in Columns

When looking at grids and columns in Sprocket, it can be helpful to view them ascending or descending order alphabetically or numerically. You can sort records in columns by clicking the column header. Let's say you are viewing a grid of work orders and you wish to view them alphabetically by *Location*. To sort them, simply click the word *Location* at the top of the column.



Now all of these work orders will be displayed in ascending order by location. Click the word Location again to sort in descending order. Notice that the column is highlighted in blue, indicated that this

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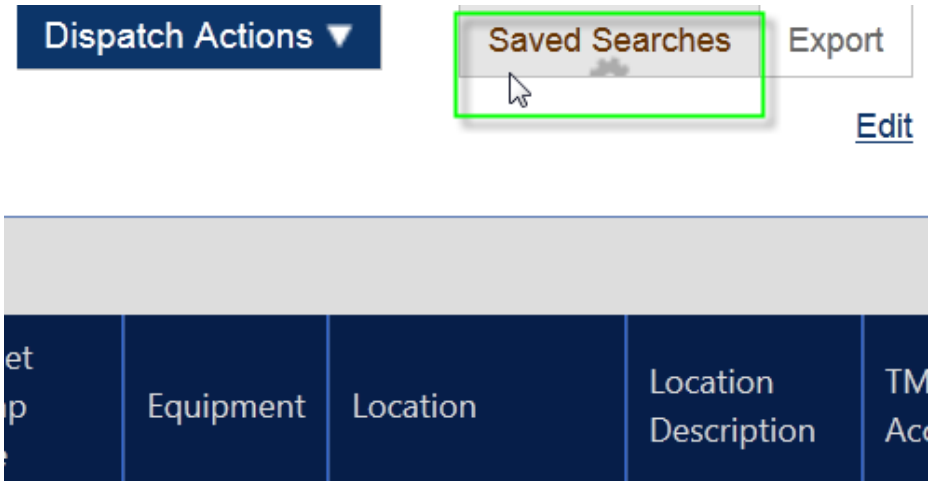
column has been sorted. Once you exit this screen and return, it will be reverted to the default ordering of column information. Columns can also be sorted numerically.

3.5 Saved Searches

Throughout Sprocket, whenever you are viewing a list of work orders or records, you will notice a button labeled ***Saved Searches*** at the upper right hand corner of your page. A ***Saved Search*** is a filtered view of records in Sprocket. For example, if you wanted to view all the cancelled work orders in Sprocket, you would select the *All Cancelled Saved Search* from the list and all the work orders that have been cancelled would be displayed.

Click here to view *Saved Searches*.



This will show a list of possible *Saved Searches* or *Views* you can use to view records in Sprocket. Notice that using the links to the right of each *Saved Search*, you can *Delete* a *Saved Search* or *Share* it with other employees.

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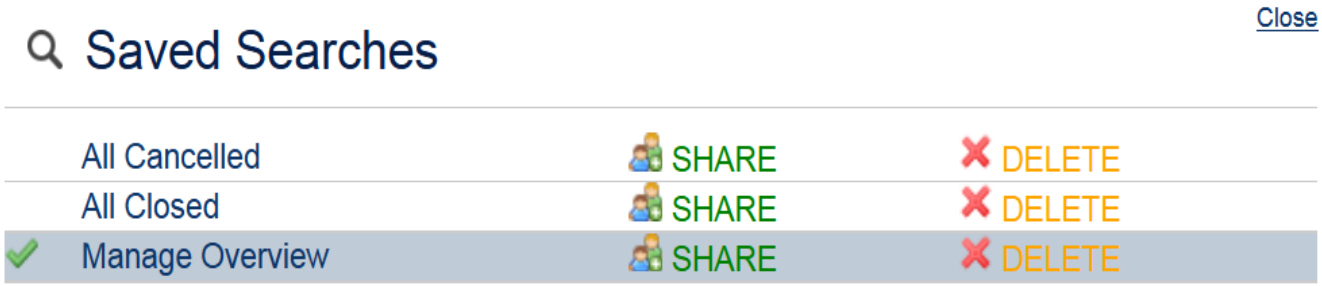
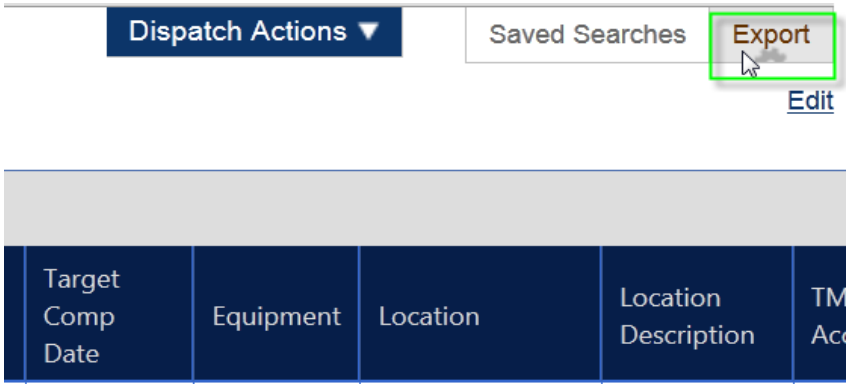


Note: Sprocket customizes screen settings based on customer needs. Your screen may or may not display the above Saved Searches. Contact your Sprocket Administrator with questions.

Here can select the view you would like to use to filter records in Sprocket. The *Manage Overview* saved search is the most commonly used *Saved Search*. It is basically a list of all work orders in Sprocket. If you wanted to view all the cancelled work orders, you would select the *All Cancelled Saved Search*. The screen will refresh and a grid will display all of the cancelled work orders.

3.6 Exporting to a Spreadsheet

Sprocket provides the ability to export data to a spreadsheet application such as Microsoft Excel. If you are viewing a grid of data and would like export to excel, click the ***Export*** button at the top right of the page, next to the *Saved Searches* button.



You may be prompted for the file type you wish to export this data to. Most computers have a default program for spreadsheets. Click ***OK*** to continue with the export.

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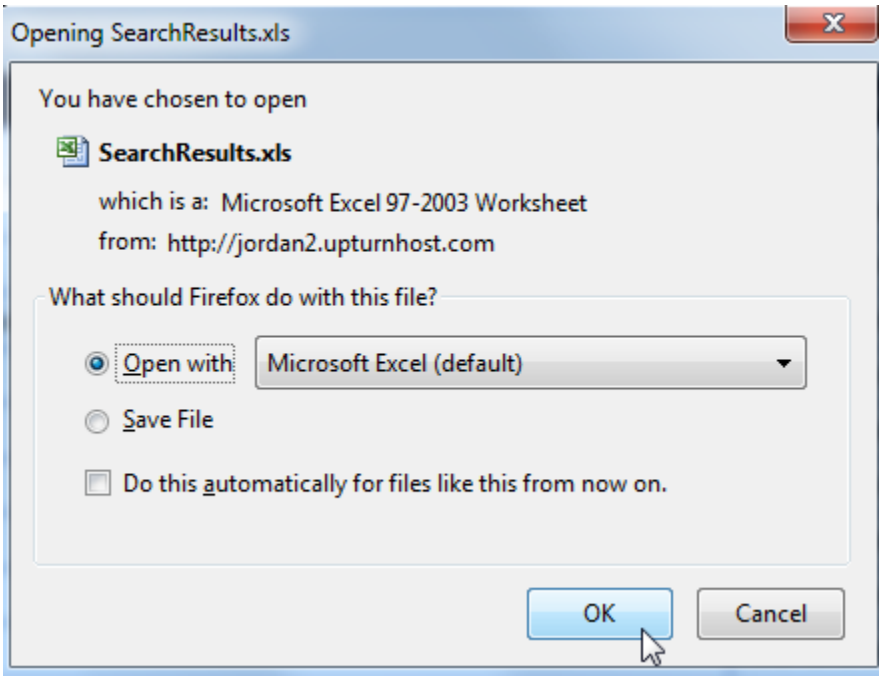

Once your data is in the spreadsheet, you can use the built in filters to arrange it as needed. Exporting and altering data in a spreadsheet will not affect the data in Sprocket.

3.7 Dispatch Actions

Notice on pages with grids there is a ***Dispatch Actions*** menu at the top right corner of the page. Dispatch Actions are used to quickly process work orders to complete work cycles. You will see these

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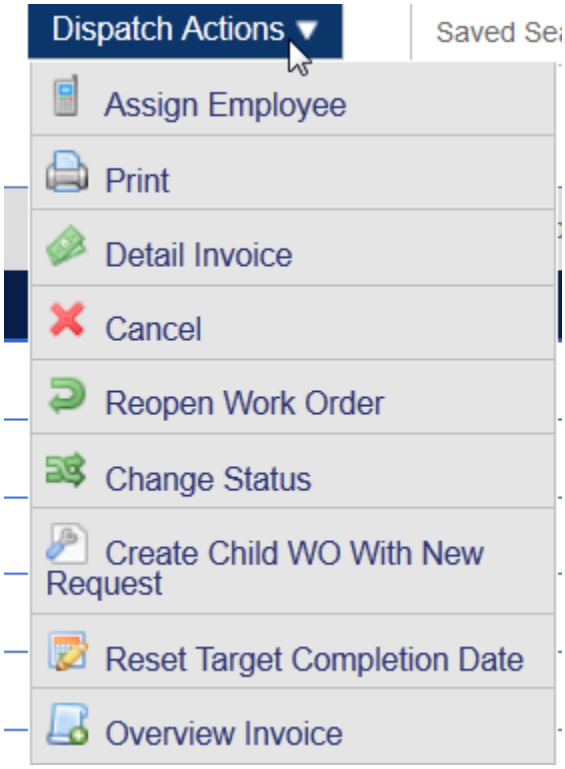
actions on *Saved Searches*, *Work Order Details*, and *Dispatching Results*. To view the *Dispatch Actions* menu, hover your cursor over the *Dispatch Actions* button.



Note: Sprocket is customized based on customer needs. Your screen may or may not display the above dispatch actions. Contact your Sprocket Administrator with questions.

To apply a *Dispatch Action* to a work order from a *Saved Search*, select the desired work order(s) from the grid by clicking the checkbox to the left of each work order. Keep in mind it is possible to select multiple work orders from a grid and perform a single Dispatch Action on all selected work orders.

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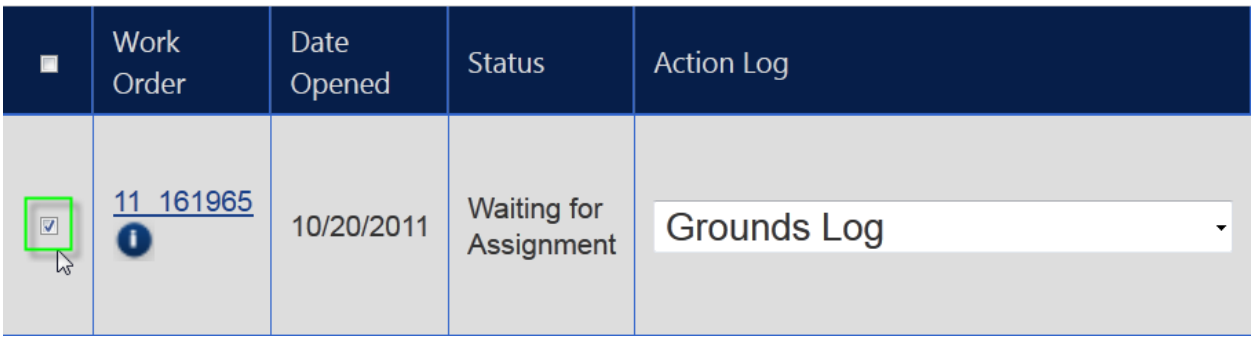
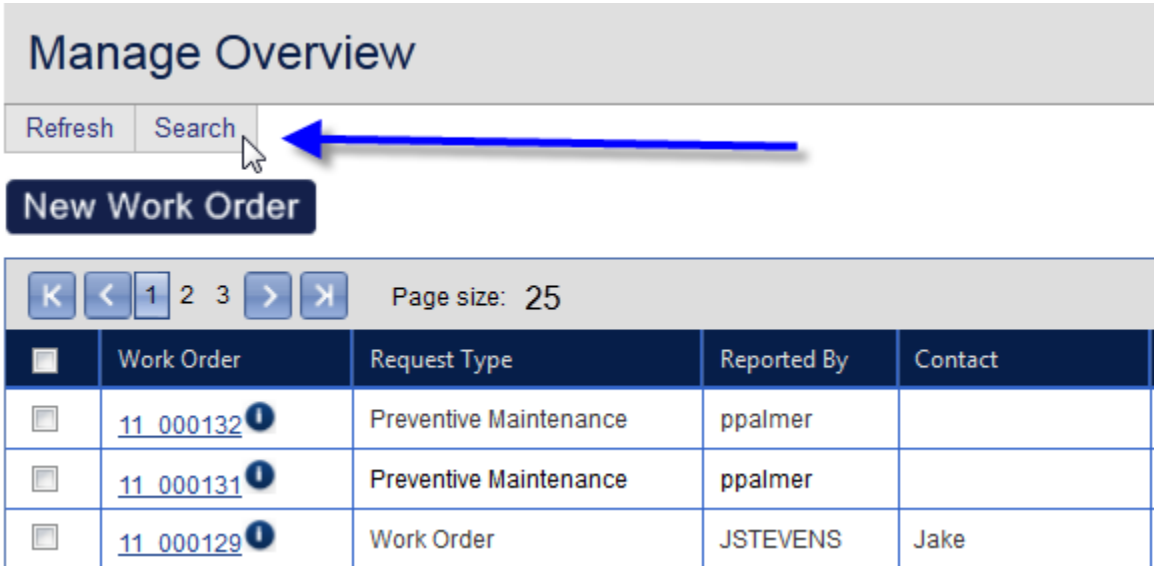


Once selected, open the *Dispatch Action* menu and select the appropriate *Dispatch Action* to apply to the work order(s). So, if you wanted to assign an employee to a work order, you would select the desired work order and select the *Assign Employee Dispatch Action* and fill in the appropriate fields.

You will learn more about *Dispatch Actions* throughout this guide.

3.8 Search Criteria

When viewing records in Sprocket, you can apply search filters and criteria to narrow the results of the search. To do this, click the ***Search*** button in the upper left hand corner of the page.



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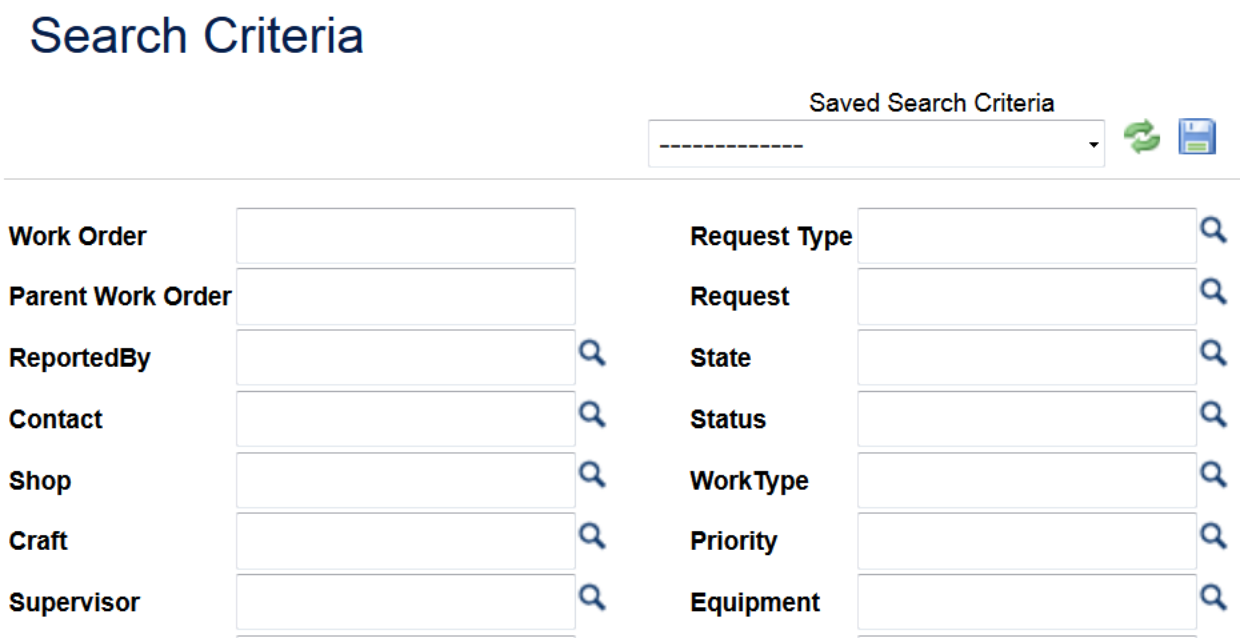
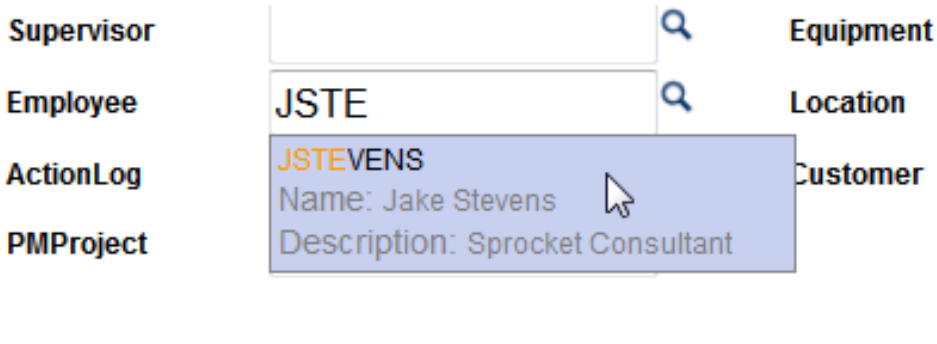
A window labeled ***Search Criteria*** will appear. Here you can enter in particular information you wish to filter for you search.



Let's say you wish to search for only work orders with *JSTEVENS* as the employee. Using the *Auto Lookup Tool*, begin typing *JSTEVENS* into the ***Employee*** field. Once the correct results are displayed, select *JSTEVENS* to populate the *Employee* field.



Once you have populated the employee you wish to search for, click the ***Search*** button at the bottom of the search window to view the results.

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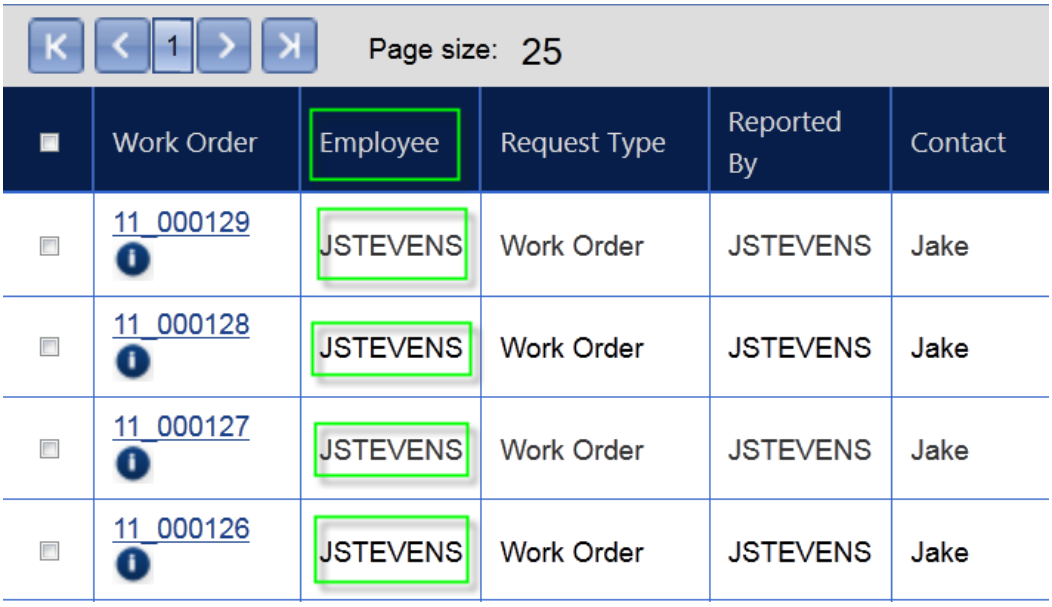
Now all of the work orders that are assigned to JSTEVENS will appear in the grid.



1 Page size: 25

	Work Order	Employee	Request Type	Reported By	Contact
	11_000129	JSTEVENS	Work Order	JSTEVENS	Jake
	11_000128	JSTEVENS	Work Order	JSTEVENS	Jake
	11_000127	JSTEVENS	Work Order	JSTEVENS	Jake
	11_000126	JSTEVENS	Work Order	JSTEVENS	Jake

3.8.1 Saved Search Criteria

You can also save the criteria you search for. Let's say you often search for the work orders that JSTEVENS currently is working on. You can save this criteria and use it to search for this information. To do this, start by entering the desired filters. So, you would enter *JSTEVENS* into the *Employee* field and enter *Scheduled* into the *State* field, meaning it is not closed or cancelled. Once all of the information has been entered into the *Search* form, click the disc icon at the top of the window to save this search criteria.

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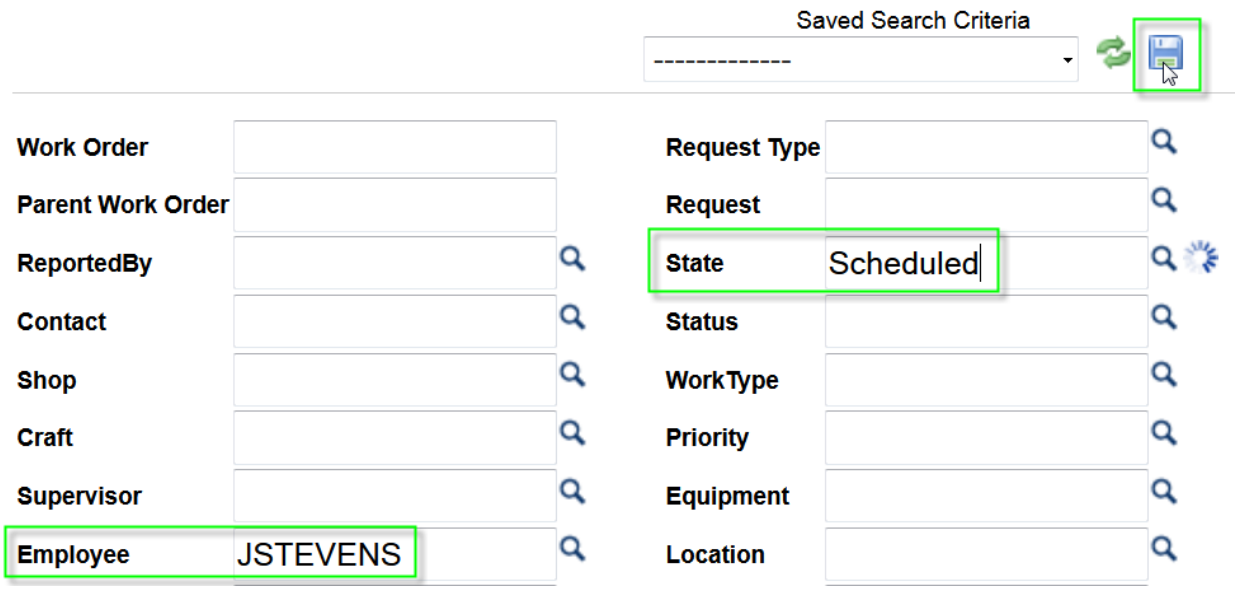
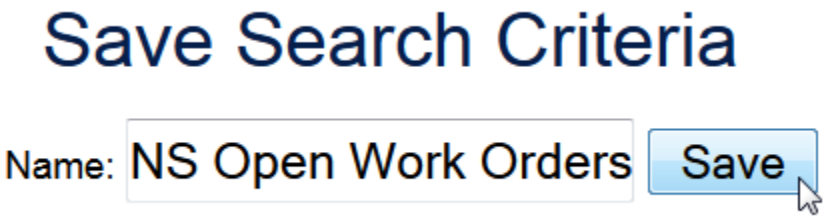


Clicking the disc will open a window with a *Name* field. Here you can name your saved search criteria. Let's name this ***JSTEVENS Open Work Orders***. Once you have entered in the name of your search, click the ***Save*** button to the right of the *Name* field.



Now, whenever you want to see the open work orders for this employee, the saved search criteria will be in a drop down menu at the top of the *Search Criteria* window.

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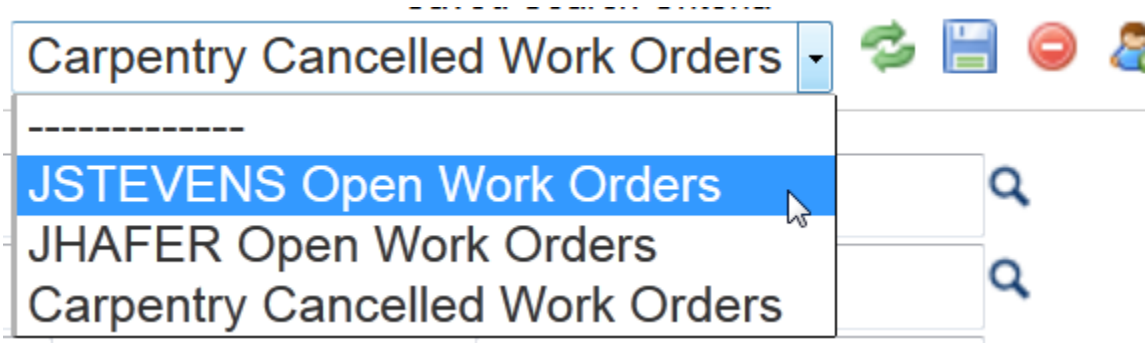

By selecting this *Saved Search Criteria* and clicking the *Search* button, you will be able view only open work orders for JSTEVENS.

3.8.2 Saved Search Criteria Icons

Notice the new icons that have appeared to the right of the *Saved Search Criteria* drop down menu. You already know that the disc icon indicates being able to save criteria and name it. Simply enter in the fields you wish to search for and click the disc to name your *Saved Search Criteria*.

Use the green arrows when you want to refresh the search criteria fields. So, if you were searching for all open work orders for JSTEVENS and you would like to clear the fields and search using different criteria, click the green arrows to clear all the fields and begin a new search.

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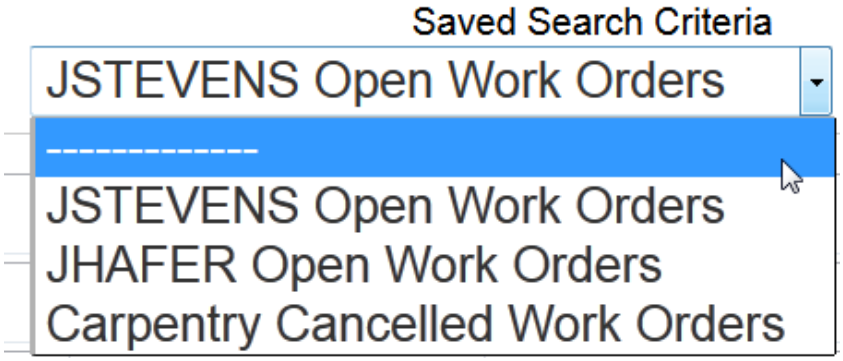
You can also refresh the *Search* window by selecting the ---------- from the *Saved Search Criteria* drop down menu and your search fields will be refreshed.



If you ever decide you do not need a particular *Saved Search Criteria* search, you can always delete it using the red circle. Simply select the desired search from the *Saved Search Criteria* drop down menu and click the red circle.

Just like *Saved Searches*, you can also share your *Saved Search Criteria* with other employees. To share your search criteria, select the desired *Saved Search Criteria* from the drop down menu and click the people icon to share out *Saved Search Criteria* with other employees.

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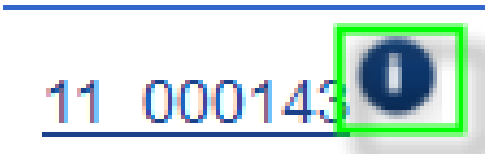
3.9 Information Icon

As you navigate throughout Sprocket, you will notice the *Information Icon* to the right of certain records.



If you click on the icon and drag your cursor into the information pop up window, you can view additional details about a record. This is a quick and easy way to view details about a specific record in Sprocket.

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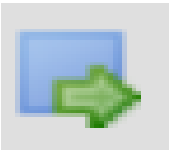
Work Order Number 11_000143
Requested By: Palmer, Paulson
Contact:
Phone:
Supervisor:
Employee:
Location: Parker-Floor 1-Room 102
Description: Parker-Floor 1-Room 102
Person:
Equipment:CONDENSERS5
Description:
State: Scheduled
Status: Waiting Assignment
Description: CONDENSER, AIR COOLED, OVER 100 TONS (No Comp)
Priority:
ActLabHours: 0.0
Budget Unit:
ActMatCost: 0.0
Attachments:

Note: Sprocket is customized based on customer needs. Your screen may or may not display the above Work Order Details. Contact your Sprocket Administrator with questions.

The above features described in this section will be displayed all throughout Sprocket. You now have a better understanding of how to use these functions.

3.10 Quick Jump Tool

You will notice the ***Quick Jump Tool*** as you are in *Work Order Details* or when you are in record grids such as *Equipment* or *Inventory* lists. The *Quick Jump Tool* is symbolized by a blue box with a green arrow.



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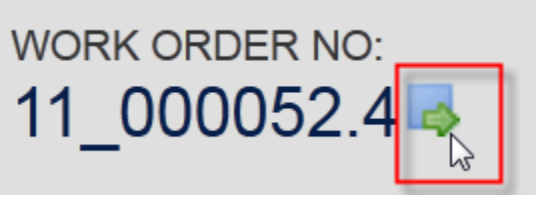
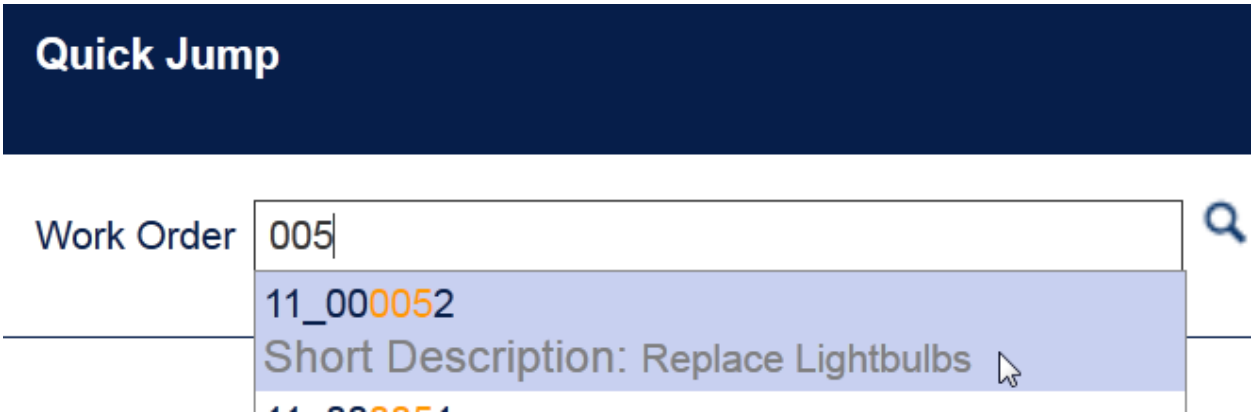
Use this tool to quickly navigate from record to record without having to return to *Saved Search* grids to sift through records. This icon is always located at the top of the page next to the name of the record you viewing. To use the *Quick Jump*, click the icon and enter in the name of the record you wish to "jump" to.



A field will appear where you can use the *Auto Lookup Tool* to help locate the correct record. Once the correct record is returned, select it from the list.



To the right of the window, click ***Go*** to navigate to this record or click *Cancel* to stay on this page.

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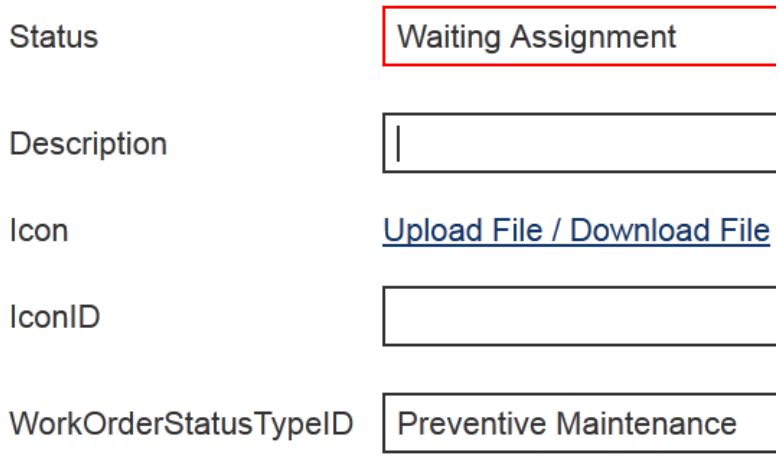
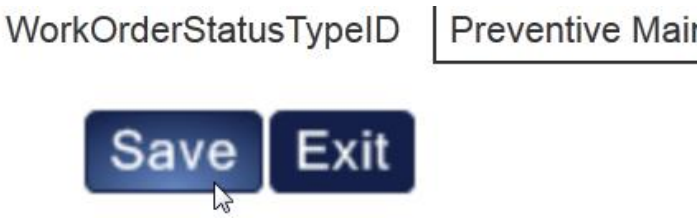
3.11 Quick Edit Tool

Throughout Sprocket, you will notice the ***Quick Edit Tool***. This tool is used to quickly edit or modify records in Sprocket. It is symbolized by a pencil and eraser.

When you click this icon, you are directed to form with information about the field you are editing. Here you can change or add information.



To edit or add information to a field, click inside the field and type in the information you wish to add to this record. Once you have added all information, click the Save button at the bottom left of the page.



Now this record will be updated with your changes.

4.0 Work Management

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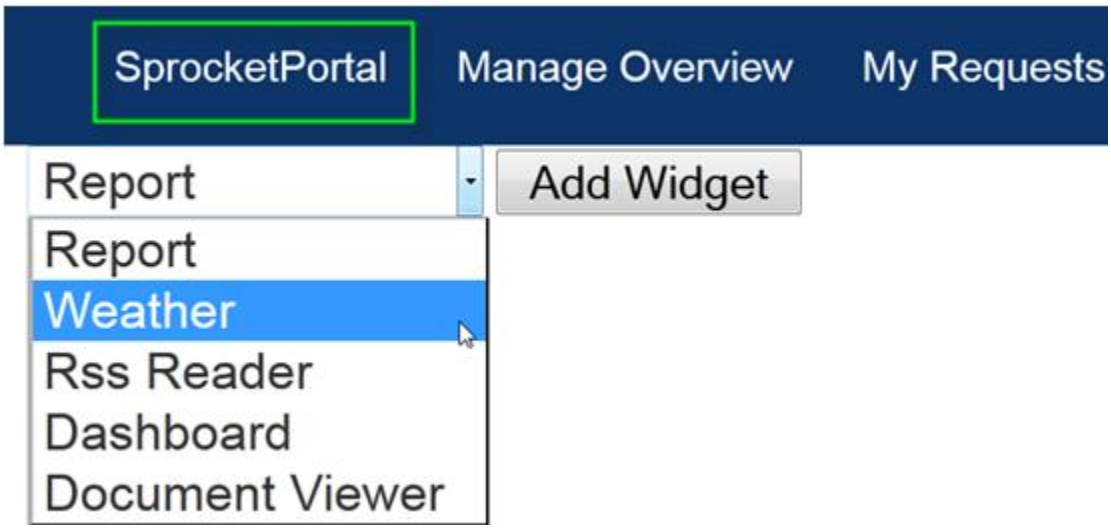
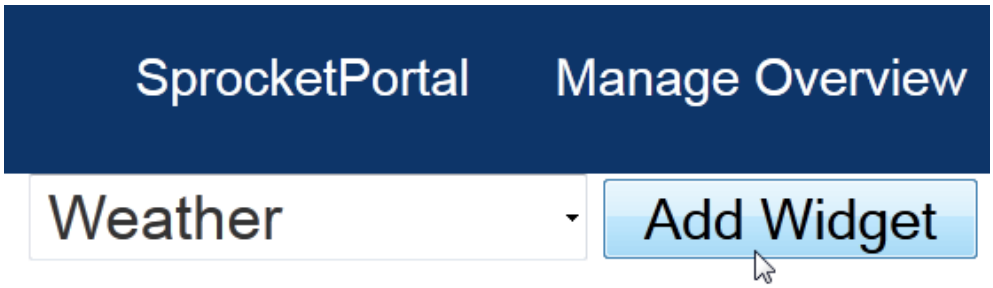
4.1 Sprocket Portal

The first time you log into Sprocket, you will be automatically directed to the ***Sprocket Portal*** tab under the *Work Management* console. This screen allows users to add customized widgets such as daily reports or the weather to their user portal.

Let's say you wanted to add a widget that allows you to see today's weather. When you log into your Sprocket user portal, click the widget drop down menu and select ***Weather***.



Once selected, click the ***Add Widget*** button to the right of the menu.



This widget will prompt you for a zip code. Enter in the zip code and click the ***Save*** button.

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Your screen will refresh and the weather widget will be displayed for this user when logged in. Keep in mind it is possible to have multiple widgets on your *Sprocket Portal*.

Notice the icons that appear in the right hand corner of your widgets. They appear when you hover your mouse over the blue bar at the top of the widget window.

The first icon is a magnifying glass. Click this to increase the size of a widget on your Sprocket Portal.

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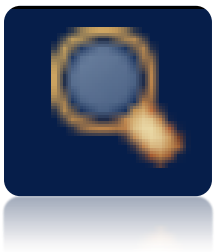
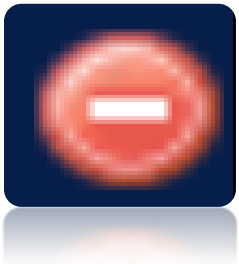


The center icon is the ***Quick Edit*** link. Click here to make a change to your widget. So, if you have a weather widget and you decided to apply a different zip code for daily weather, you would click this icon to apply and save that change.

The icon to the far right should look familiar from the section on *Saved Searches*. Click this red circle if you wish to delete a widget from your *Sprocket Portal* altogether.



4.2 Manage Overview

Next to the *Sprocket Portal* tab is the ***Manage Overview*** Tab. Click here to view and manage work orders.

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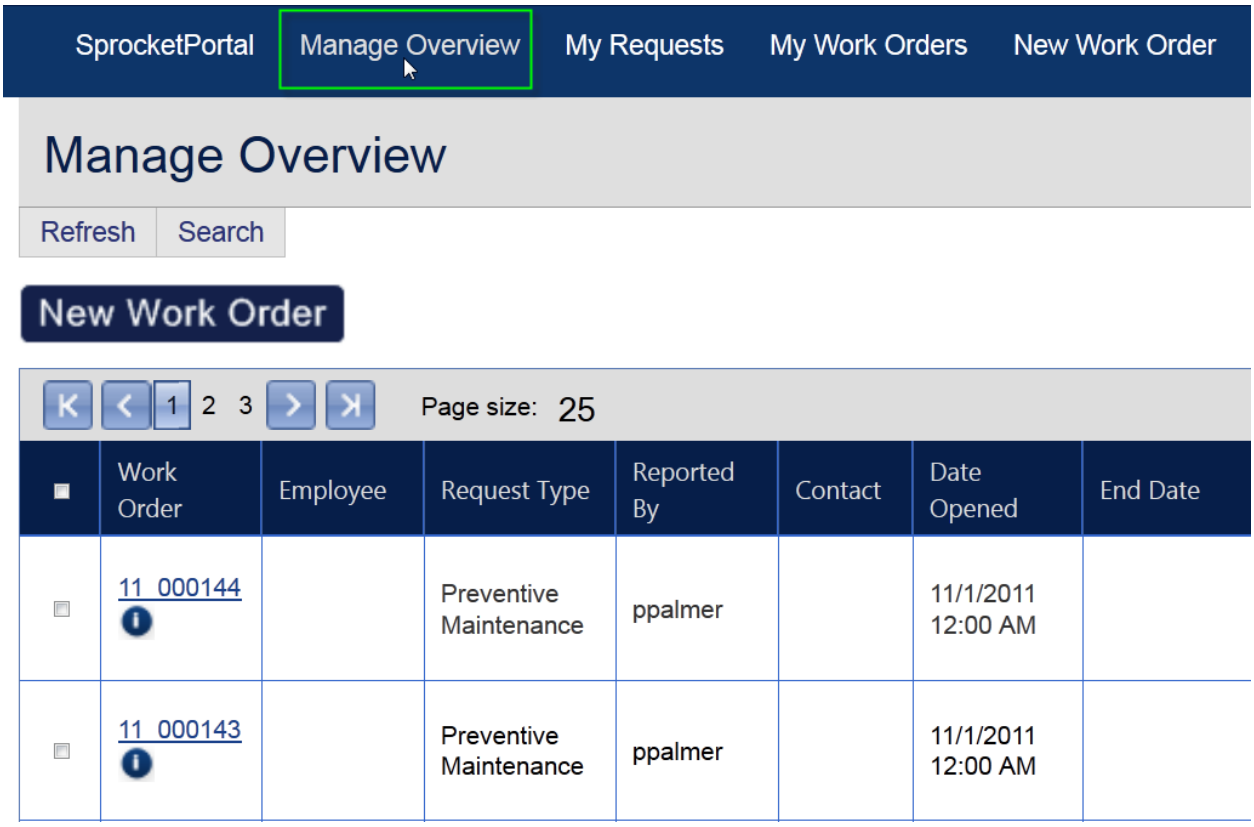

This screen will automatically display the last *Saved Search* that was selected from the logged in user's last session. So, if the last time you logged in, you were using the *All Cancelled Work Orders Saved Search*, this screen will automatically display *All Cancelled Work Orders*.

Notice that the name of the *Saved Search* you are viewing is always displayed at the top left of the page.

So, we are viewing the *Manage Overview Saved search*.

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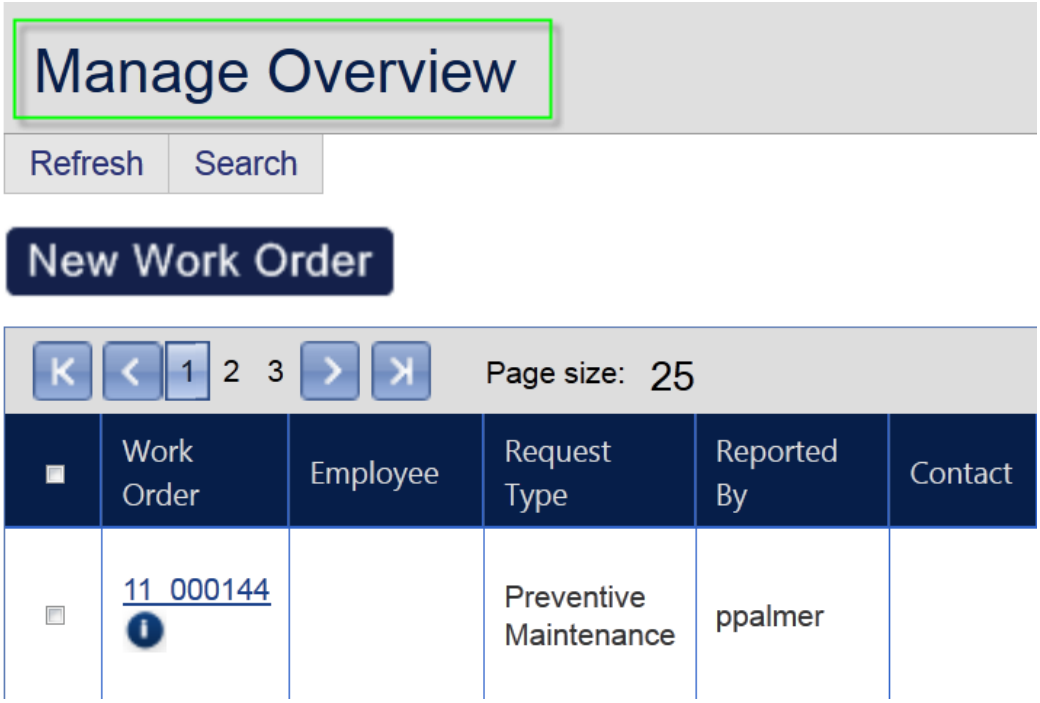
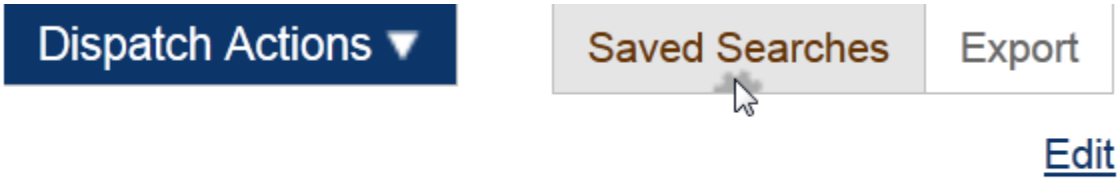


If you ever want to change the *Saved Search* you are viewing, click the *Saved Search* button in the upper right hand corner of your screen.



Notice that the *Saved Searches* appear and the current *Saved Search* is highlighted and has a check mark next to it. Select the name of the desired *Saved Search* to view a different set of work orders.

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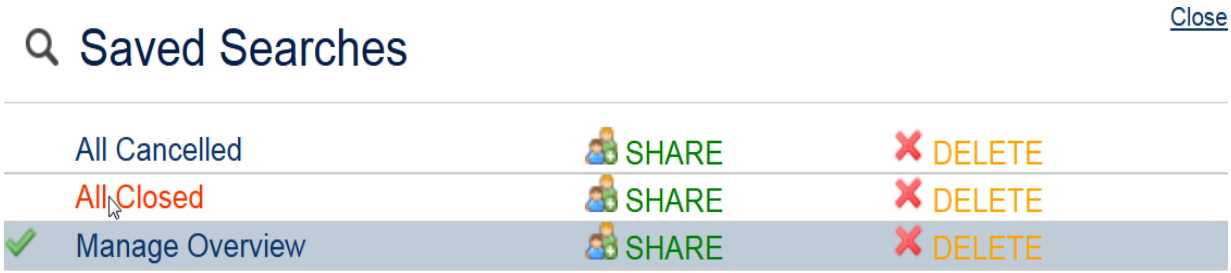
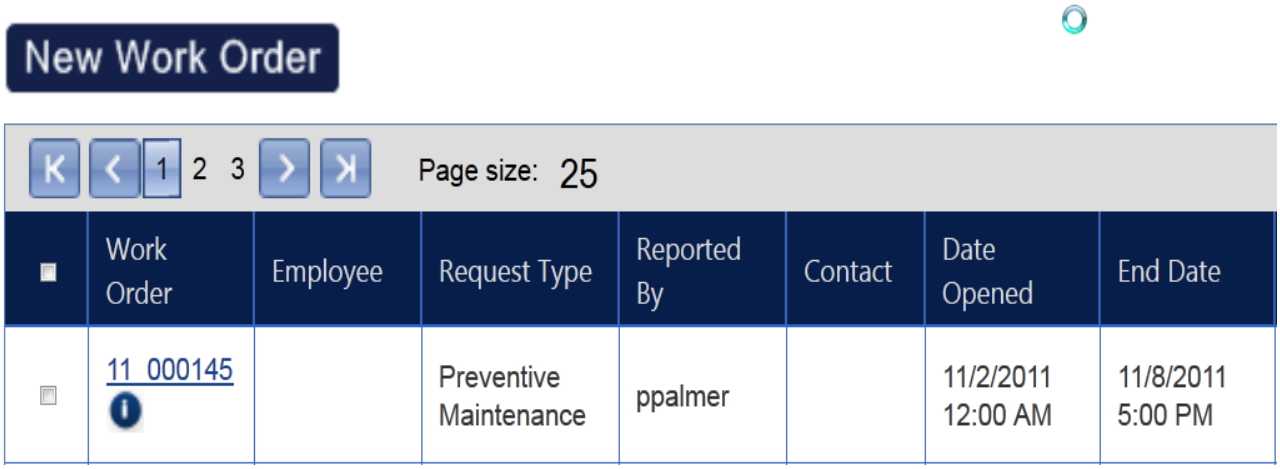


Note: Sprocket is customized based on customer needs. Your screen may or may not display the above Saved Searches. Contact your Sprocket Administrator with questions.

Now, take a look at the grid of work orders displayed. Notice the order of the columns and the page size.



Note: Sprocket is customized based on customer needs. Your screen may or may not display the above columns or column order. Contact your Sprocket Administrator with questions.

If you wish to change the column order, you can click the column header and drag it to the desired location. This will automatically save this view for the logged in user.

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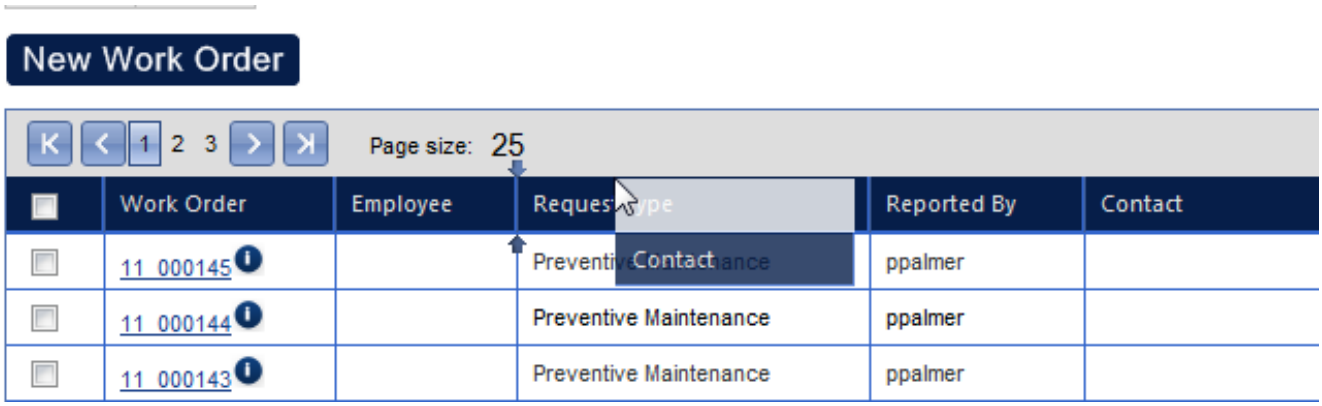
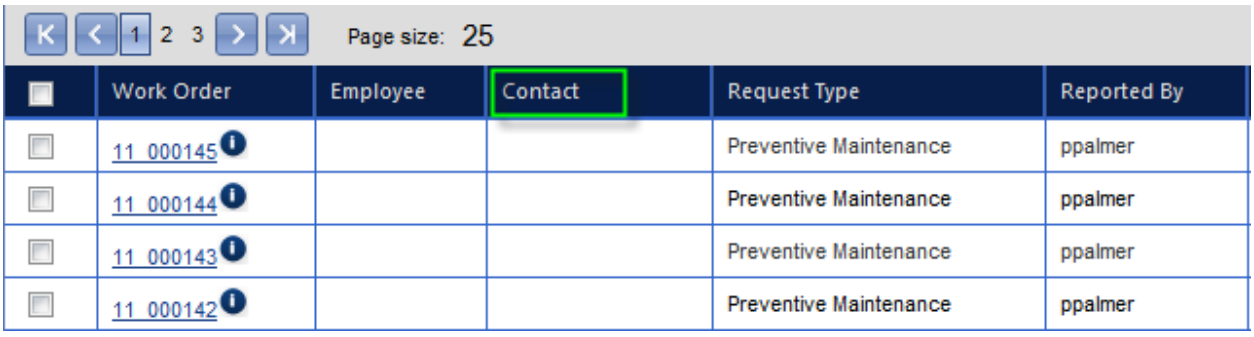


The column will set wherever you "drop" it. This will only change the view for logged in user. Notice that now the *Contact* column is located between *Employee* and *Request Type* columns.



Notice at the top left of the grid, pages 1, 2, and 3 are displayed. This indicates that there are work orders displayed on three pages. Use the arrows to scroll between pages of work orders.

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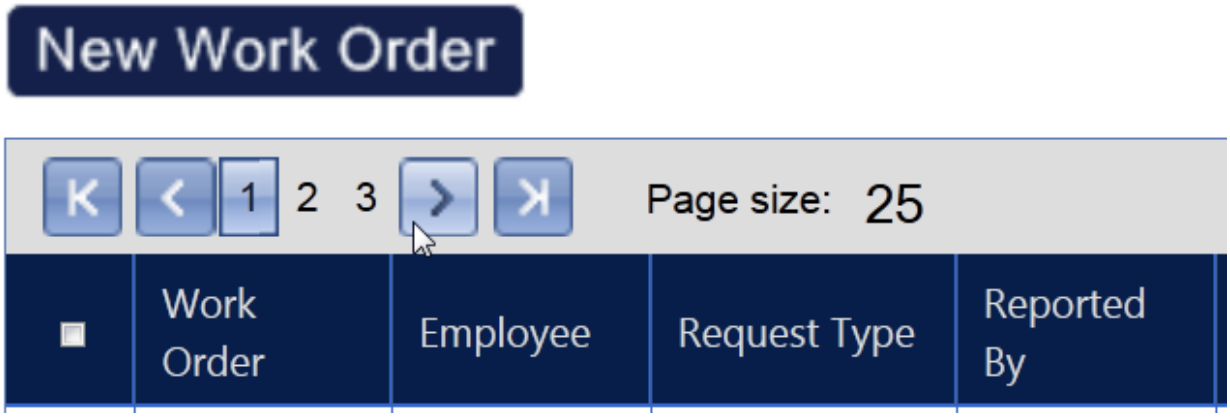
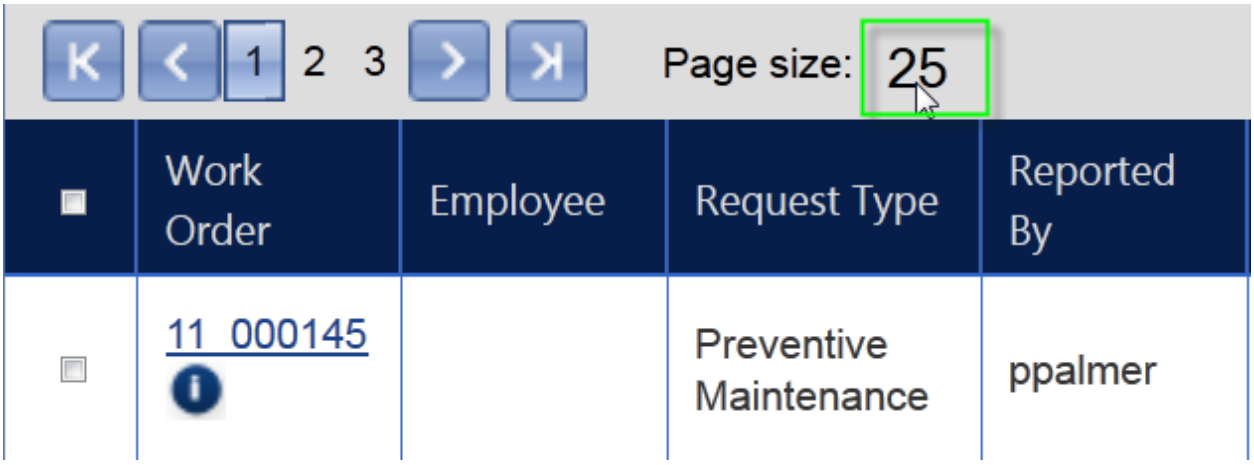


You can also change the amount of work orders you are viewing per page. Notice that next to the page arrows ***Page Size: 25*** is displayed. This indicates that you are viewing 25 work orders per page. You can change the amount of work orders you are viewing per page by clicking the number of work orders per page and selecting the desired amount from the drop down menu.

So, click the number ***25*** at the top of the work order grid.



A drop down menu will appear. Select the number of work orders you would like to view per page.

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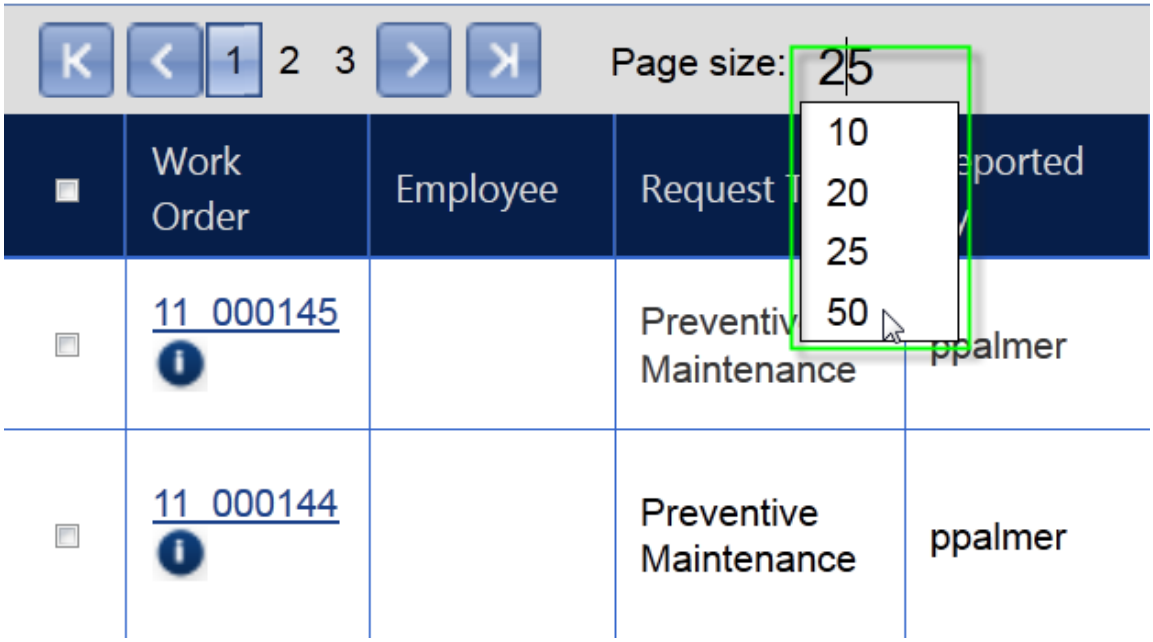
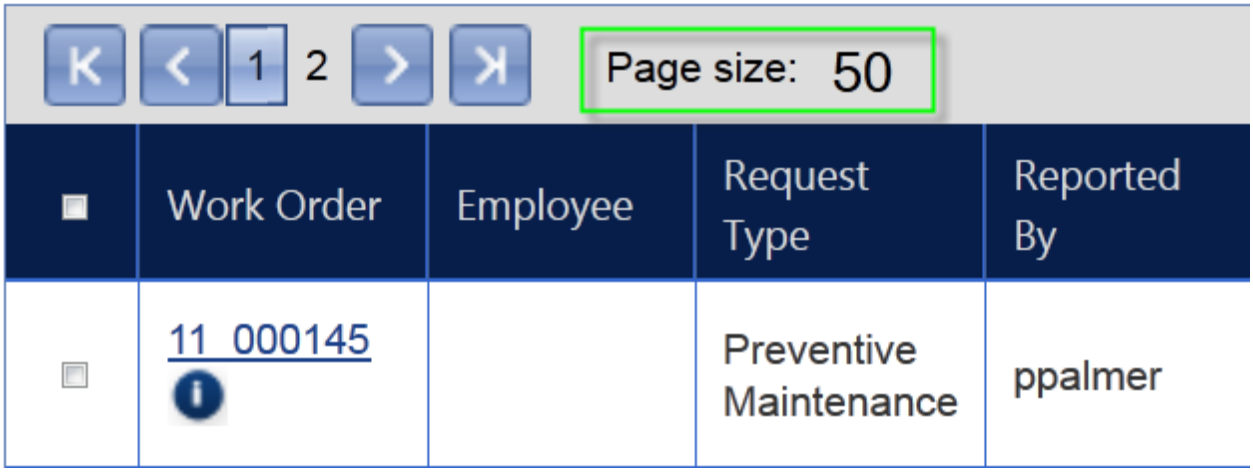


The page number will automatically refresh and show the new amount of work orders per page.



Notice at the top right of the grid, the total number of work orders is displayed.

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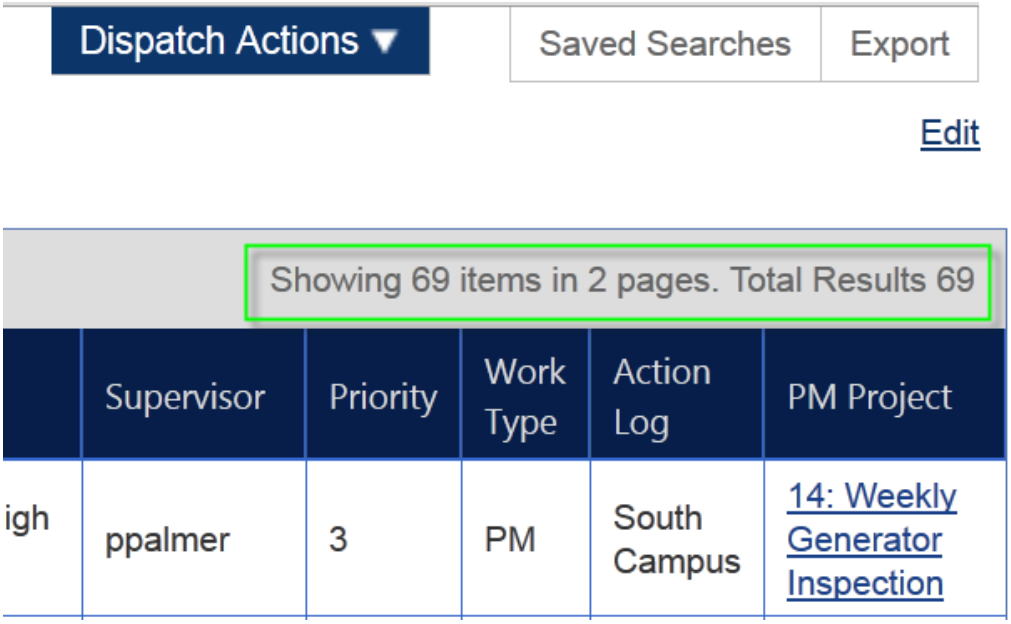
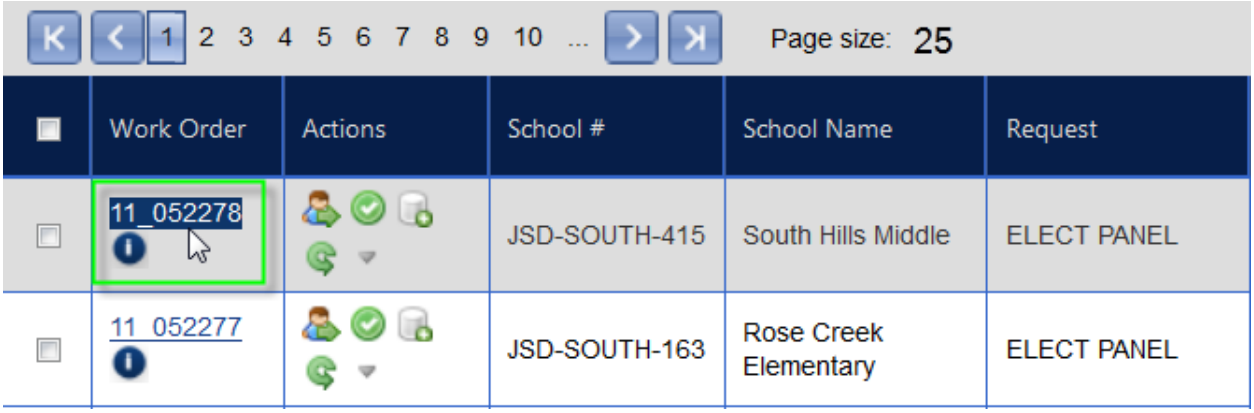


As you view your list of work orders, notice that the *Work Order Identifier* is a clickable link. Click on a *Work Order Identifier* to view the details of this work order.



Note: Work Order Details will be explained in section 5.0.

Notice the ***New Work Order*** button at the top of the screen. Click here to create a new work order on the *New Work Order Screen*.

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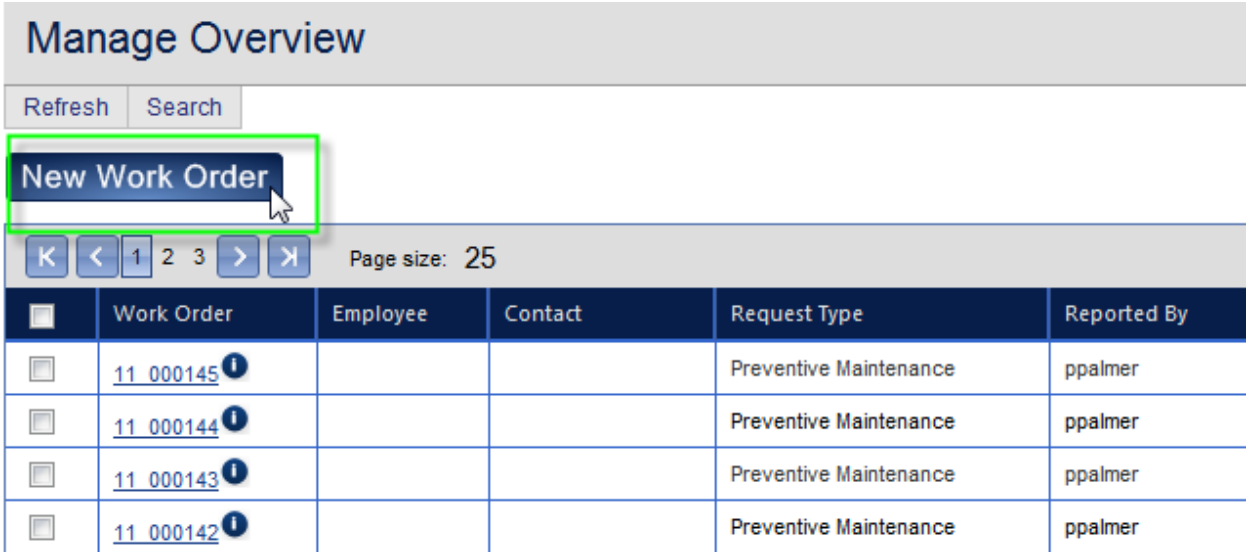

Note: The New Work Order Screen will be explained in section 4.5.

4.3 My Requests

Next to the *Manage Overview* tab is the ***My Requests*** tab. Click here to view and manage work orders that you have requested.

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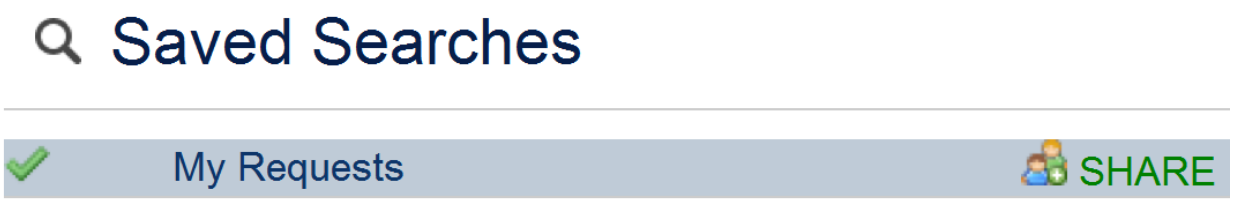
Notice that the name of the *Saved Search* you are viewing is always displayed at the top left of the page.

This screen will automatically display the last *Saved Search* that was selected from the logged in user's last session. Because this screen is specific to requests that you have submitted, the only *Saved Search* is typically *My Requests*.



Note: Sprocket is customized based on customer needs. My Requests is typically the only Saved Search on the My Requests tab. Your screen may or may not display additional Saved Searches. Contact your Sprocket Administrator with questions.

My Requests is based on Manage Overview configurations. Notice that this screen is nearly identical to *Manage Overview*. It simply only filters work orders that you, the logged in user, has requested.

Use Search criteria to search for work orders using additional filters, use Dispatch Actions to easily process work orders, and click the *Work Order Identifier* to view *Work Order Details*.

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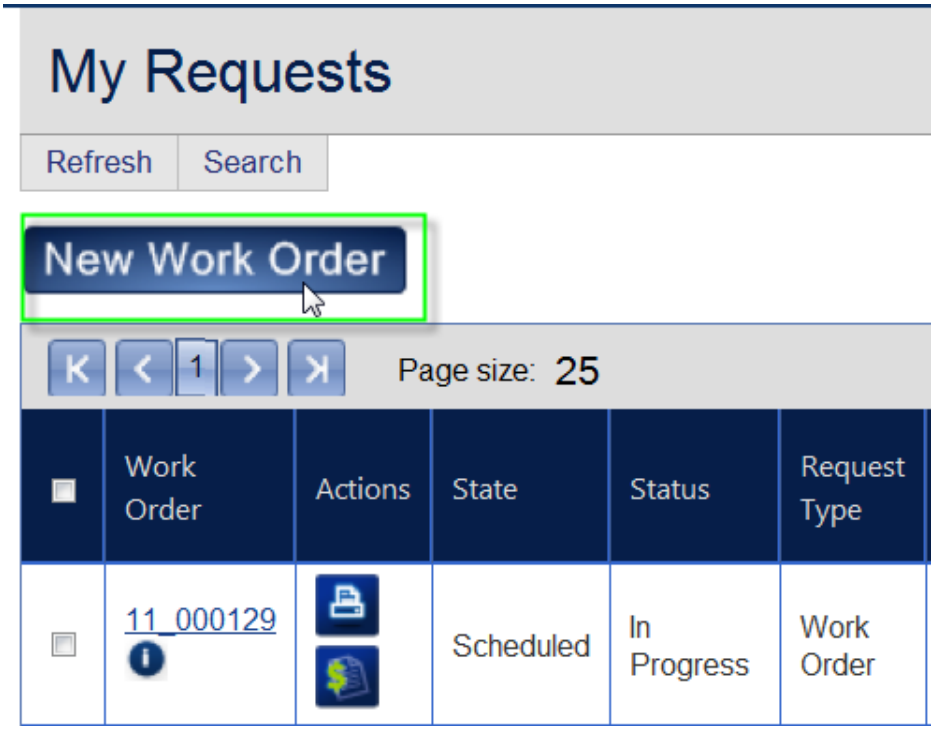
Notice at the top of the left of the screen, there is a button labeled *New Work Order*. Click here to create a new work order on the *New Work Order Screen*.



Note: The New Work Order Screen will be explained in section 4.5.

4.4 My Work Orders

Next to the *My Requests* tab is the ***My Work Orders*** tab. Click here to view and manage work orders that are assigned to you, the logged in user.

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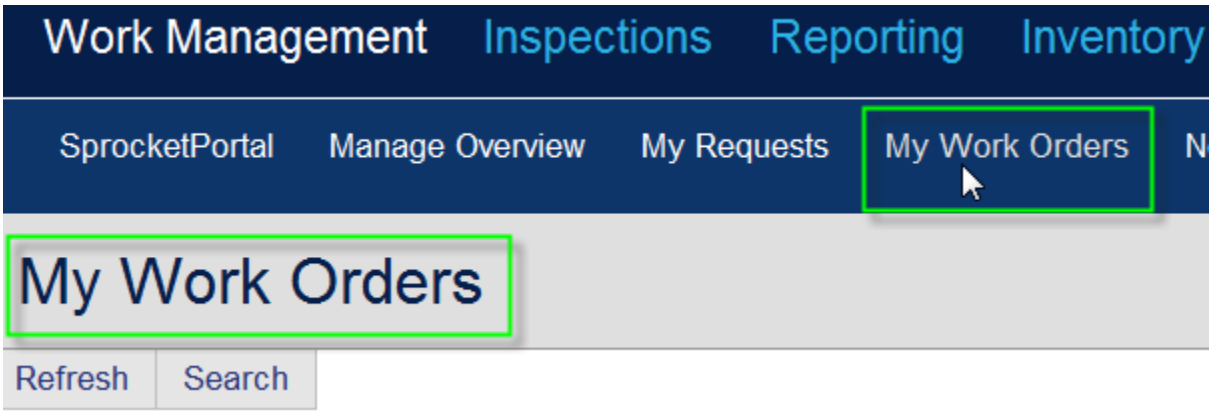

Notice that the name of the *Saved Search* you are viewing is always displayed at the top left of the page.

This screen will automatically display the last *Saved Search* that was selected from the logged in user's last session. Because this screen is specific to work orders assigned to you, the only *Saved Search* is typically *My Work Orders*.

Note: Sprocket is customized based on customer needs. My Work Orders is typically the only Saved Search on the My Work Orders tab. Your screen may or may not display additional Saved Searches. Contact your Sprocket Administrator with questions.

My Work Orders is based on Manage Overview configurations. Notice that this screen is nearly identical to *Manage Overview*. It simply only filters work orders that you, the logged in user, are assigned to.

Use Search criteria to search for work orders using additional filters, use Dispatch Actions to easily process work orders, and click the *Work Order Identifier* to view *Work Order Details*.

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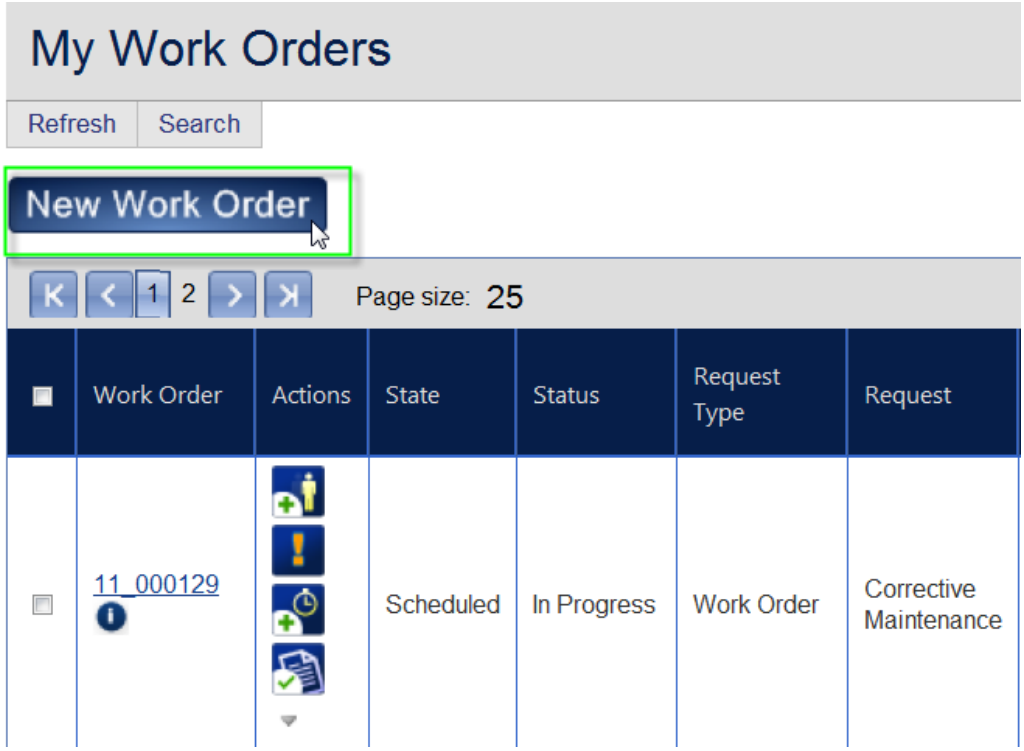
Notice at the top of the left of the screen, there is a button labeled *New Work Order*. Click here to create a new work order on the *New Work Order Screen*.



Note: The New Work Order Screen will be explained in section 4.5.

4.5 New Work Order

Next to the *My Work Orders* tab is the ***New Work Order*** tab. Click here to create and submit a new work order.

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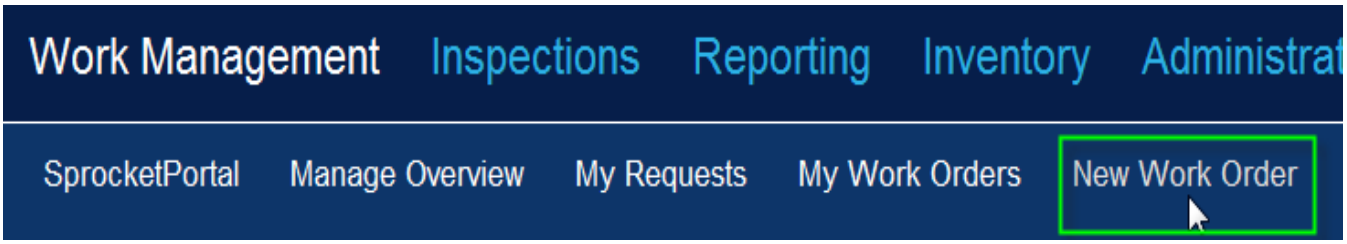
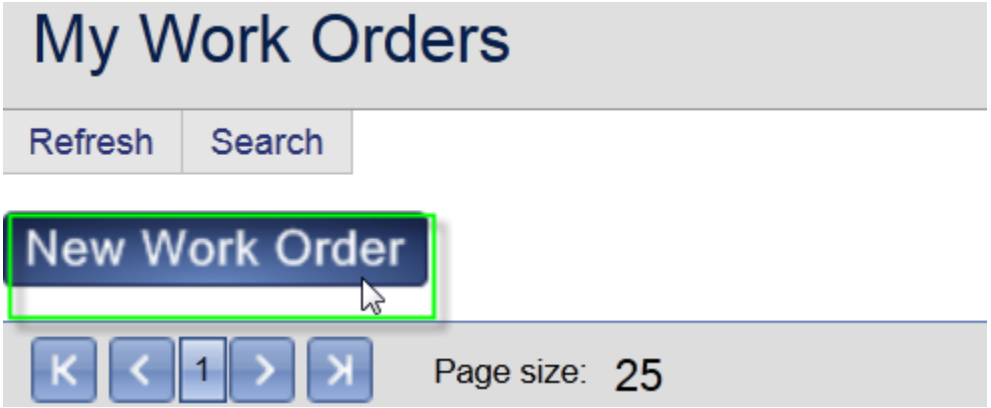


Remember that you can also use the ***New Work Order*** button at the top left of any Saved Search screen to navigate to the *New Work Order* screen as well.



You will be directed to a form called the ***New Work Order Screen***. This form is filled out with important information about the work that needs to be done. All work order screens also have a *Comments* field at the bottom of the page to enter in additional information or instructions about the work that needs to be performed.

This screen will automatically default to the last *Request Type* and *Request Code* chosen by the logged in user. These indicate the type of work you are requesting and the particular request category.

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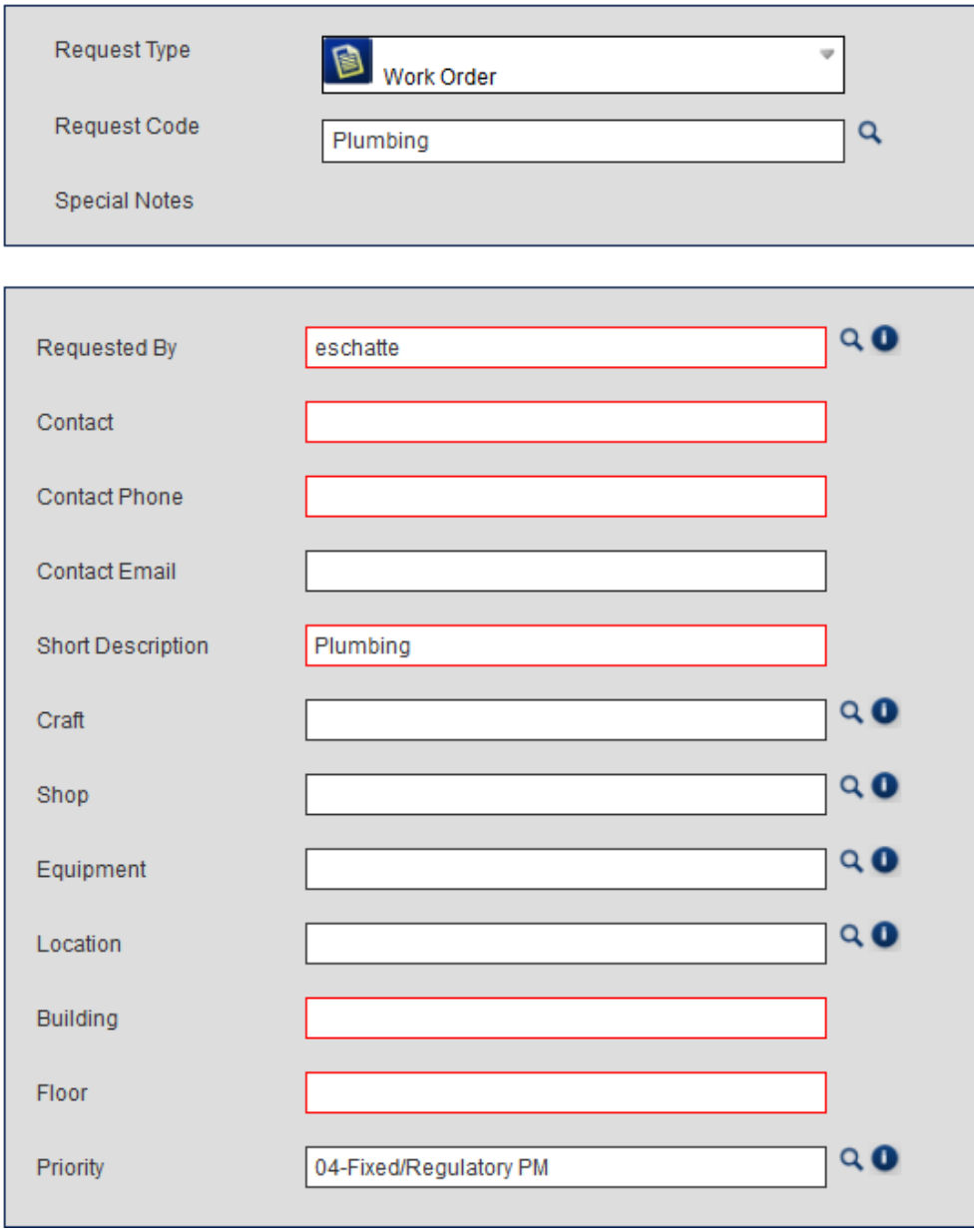

Note: Sprocket is customized based on customer needs. Your screen may or may not display the above new work order fields. Contact your Sprocket Administrator with questions.

Notice that the *Request Type* and *Request Code* fields are located at the top of the *New Work Order Screen*. Click the *Request Type* drop down menu to select the *Request Type* for this work order.

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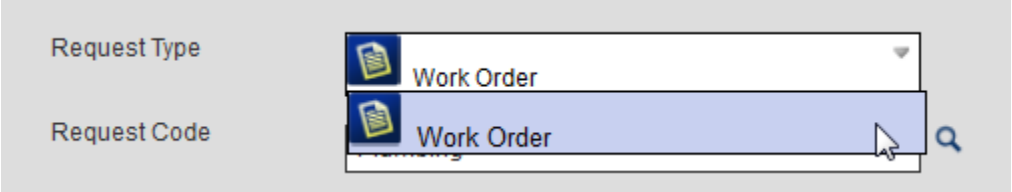
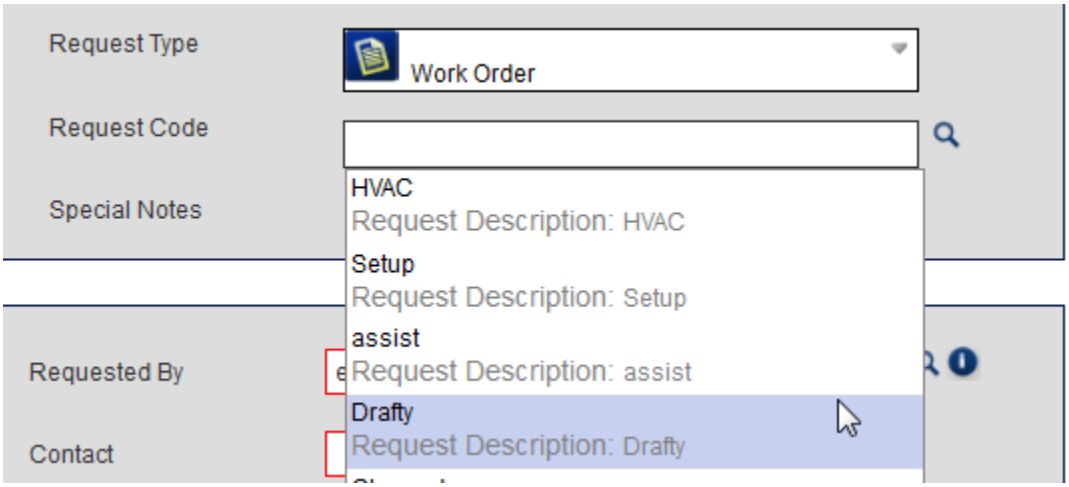


Note: Sprocket is customized based on customer needs. Your screen may or may not display the above Request Types. Contact your Sprocket Administrator with questions.

It is common for *Work Order* to be the only *Request Type*.

Now, using the *Auto Lookup Tool*, select a *Request Code* from the list which helps further classify the requested work.



Note: Sprocket is customized based on customer needs. Your screen may or may not display the above Request Codes. Contact your Sprocket Administrator with questions.

Remember, if you do not see the correct *Request Code* in the list, you can always either click the *Auto Lookup Tool* icon or begin typing all or part of the *Request Code* into the field to locate the correct *Request Code*.

Once you have selected the correct *Request Code* and *Request Type*, the *New Work Order* form will populate the fields you need to fill out. Go through this form and fill out the fields. Remember that fields outlined in red are required fields. You cannot submit a work order without filling out required fields. Fields that are not required are optional, so you may leave these fields unanswered if you wish.

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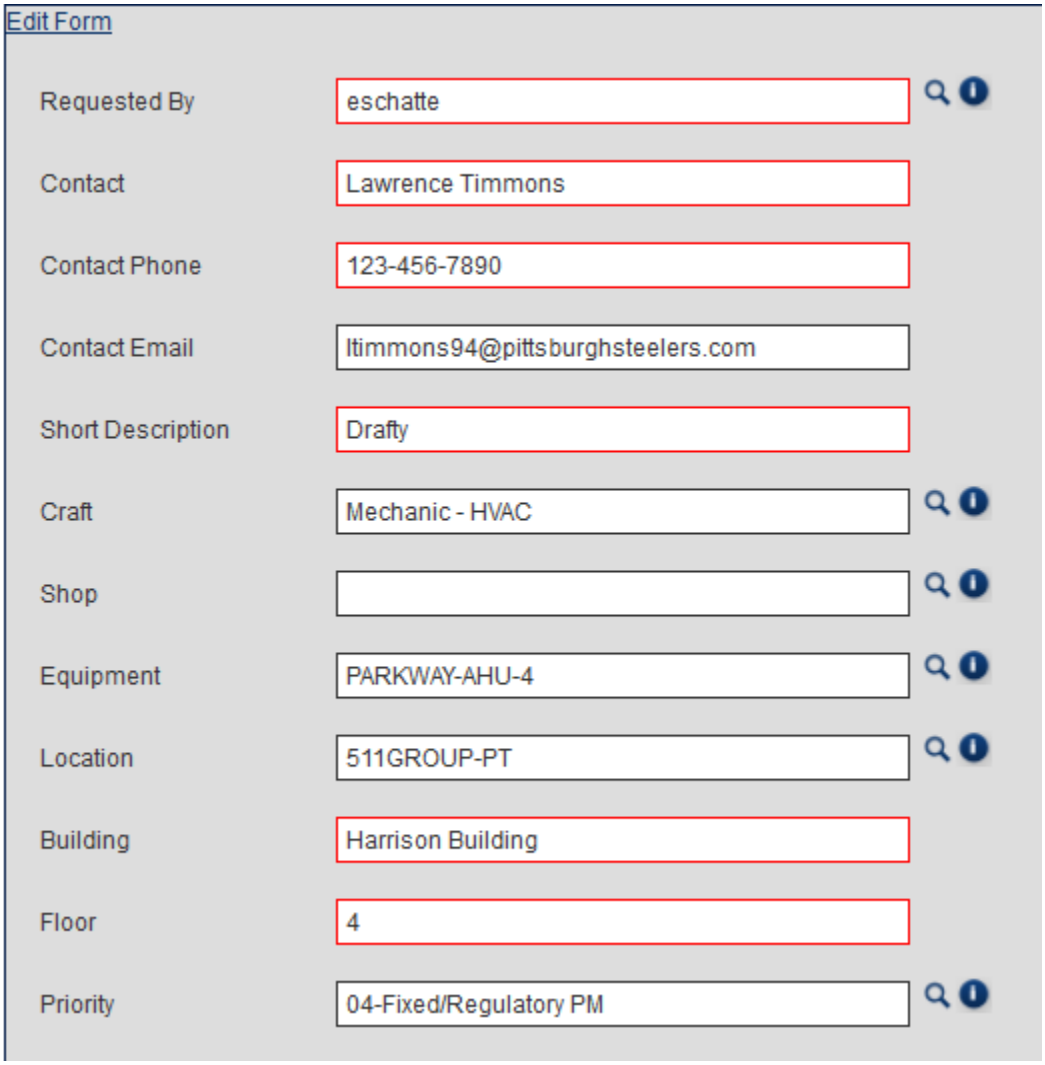
Notice that some fields have the Auto Lookup Tool next to them. Use this to help locate and select records in Sprocket such as location, craft, equipment, and shop.



Note: Sprocket is customized based on customer needs. Your screen may or may not display the above fields, Auto Lookup Tools, and required fields. Contact your Sprocket Administrator with questions.

Once you have completed the form, notice the ***Comments*** field at the bottom of the page. Click here to enter in addition comments, notes, or instructions for this work order.

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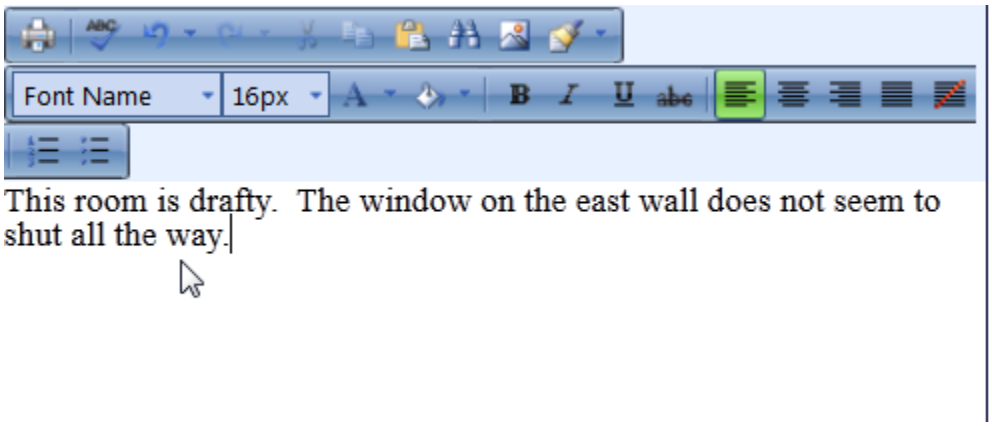

4.5.1 New Work Order Menu Panel

Before you submit your work order, notice the ***New Work Order Menu Panel*** to the left of the screen.

Note: Sprocket is customized based on customer needs. Your screen may or may not display the above New Work Order Menu Panel options. Contact your Sprocket Administrator with questions.

Use the menu to perform additional actions to a work order. Click the *Add/Assign Employee* button to add or assign an employee.

When you click the *Add/Assign Employee* button, notice a few options are displayed.

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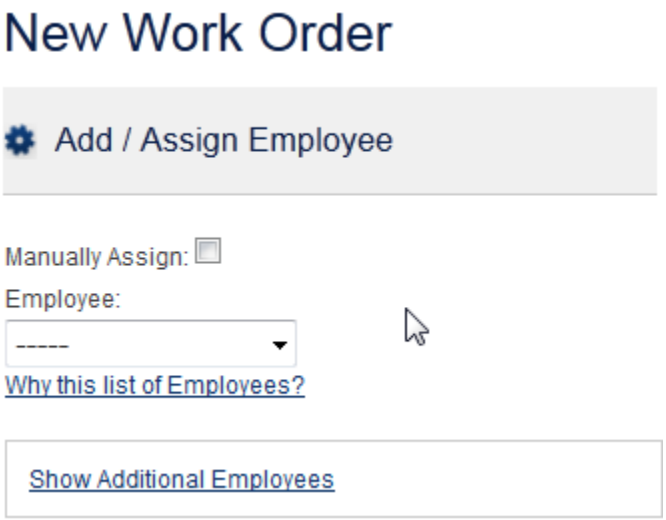
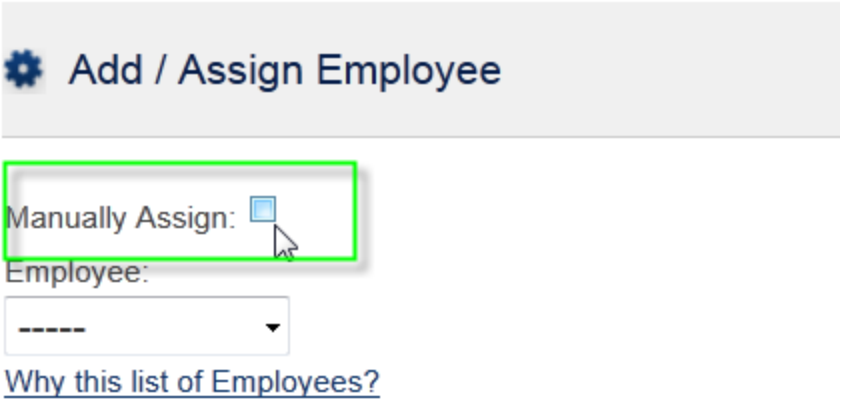


At the top of this section, notice the checkbox labeled *Manually Assign*. When employees are assigned, it is typically based on the craft or shop used for this work order. So, when the box is unchecked, the list of assignable employees to choose from will only be people in the craft or shop categories indicated in this work order. If you would like to choose from a list of employees regardless of shop or craft, check the box to select from a list of all assignable employees.



Below this checkbox is the *Employee* drop down menu. This is the menu that displays possible employees to assign to this work order. Notice that the *Manually Assign* box is unchecked, so this list will only display employees that are in the shop or craft associated to the requested work in this work order.

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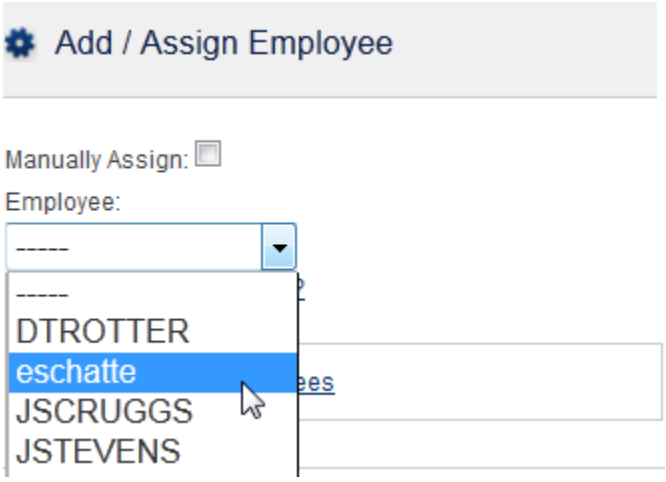

Now that an employee has been selected, notice the *Why this list of Employees?* link. Click here to view a scorecard of suggested employees that can be assigned to this work order. Sprocket utilizes dispatching heuristics to determine who the best candidate for this work is. So, the best employees for this work are shown from top to bottom in this list.

Suggested Employees

	Request (512) Heuristic:Disabled	Supervisor (128)	Shop (64)	Craft (32)	Location (16)	Equipment (8)	AccountCode (4)	Customer (2)	Working (1)
DTROTTER									✓
eschatte									✓
JSCRUGGS									✓
JSTEVENS									✓
ppalmer									✓
SSATTERFIELD									✓

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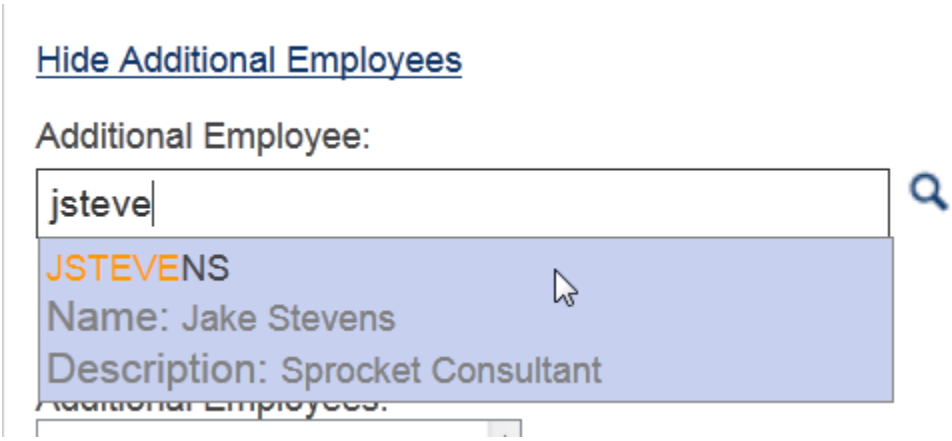
At the bottom of this section is another link labeled *Show Additional Employees*. Once an employee has been assigned, you may assign another person to this work order and create a child work order for it. Keep in mind it is possible to assign more than one additional employee.

To assign an additional employee, you may use the *Auto Lookup Tool* next to the *Additional Employee* field to locate and select an additional employee. To do this, you may either click the *Auto Lookup Tool* to view an entire list of possible employees, or begin typing all or part of the employee user name into the *Additional Employee* field.



Once you have selected the desired employee, click the ***Add Employee*** at the bottom of the field.

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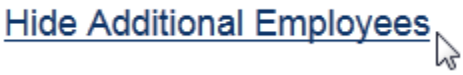
Now, this employee's user name appears in the *Additional Employees* column at the bottom of this section. If you would like to add another employee, use the *Additional Employee* field again to locate and select another employee to assign to this work order.

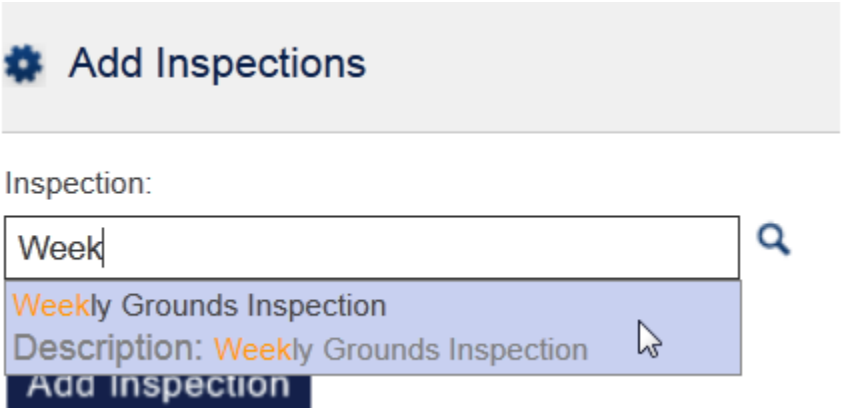
At the bottom of the Additional Employee column, use the ***Remove Employee(s)*** button to remove employees from assignment to this work order. Simply select the desired employee and click this button to remove an employee from this column.

Use the ***Hide Additional Employees*** link at the top of this section to hide this column and view the previous fields. This will still keep any additional employees assigned to this work order.



The next item in the *New Work Order Menu Panel* is ***Add Inspections***. Any work order can have an inspection attached to it so when the work is completed, someone can also inspect everything before closing the work order.

You can use the *Auto Lookup Tool* next to the Inspection field to view a list of all inspections and select one, or begin typing all or part of the name of an inspection in to the *Inspection* field.



Once you have selected the desired inspection, notice the checkbox below labeled ***Require Inspection***.

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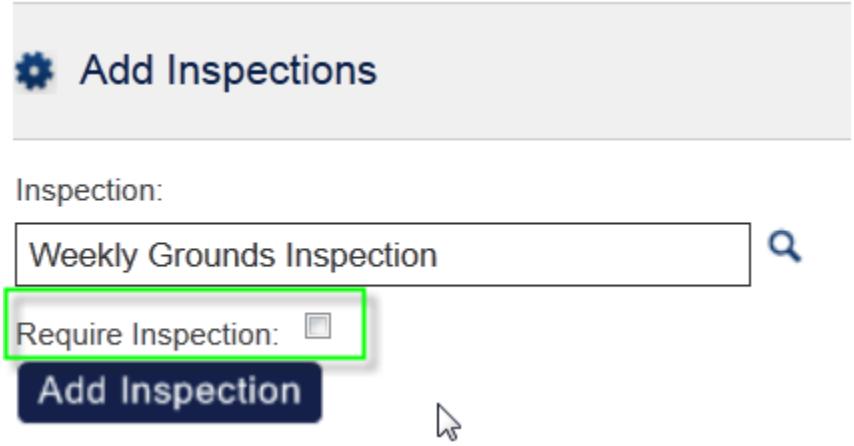
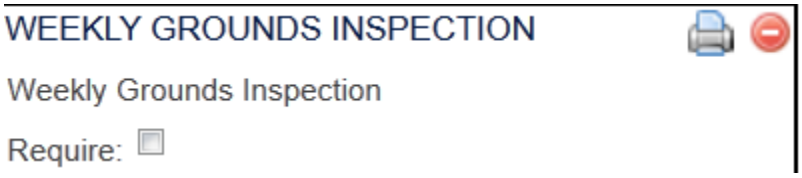


Click here to make this inspection required for the completion of this work order. If checked, this work order will not be able to be closed until the inspection has been completed. Leave this unchecked to make the inspection optional for this work order.

Once you have selected the desired inspection, click the ***Add Inspection*** button at the bottom of the section.

A window will appear at the bottom of this section displaying the inspection. Notice the checkbox labeled *Require*. Click here to make this inspection required.



In the right hand corner of the window, click the printer icon to print this inspection.

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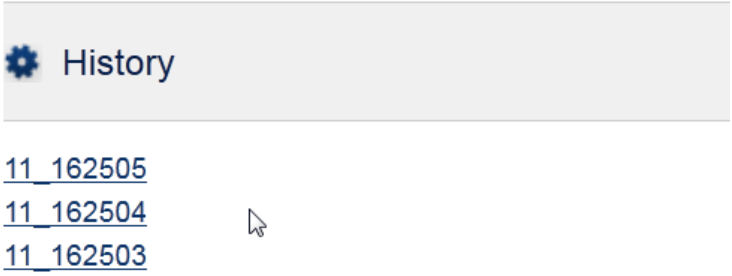
Next to the printer, click the red circle to remove this inspection from the work order.

If you would like to add an additional inspection, follow the same process to do that.

The last tab in the *New Work Order Menu Panel* is the History tab. Click here to view previously submitted work orders.



This will show work orders submitted during a log in session. Click a *Work Order Identifier* to apply changes to your current work order form. So, if your current form is showing certain information and you click a *Work Order Identifier* from the *History* list, you can apply the information from the work order in the *History* list to current work order form.

For example, let's say your current work order form has a different request code, location, and equipment than work order 11_162503. Select the work order 11_162503 to apply this request code, location, and equipment to the current work order form. A window will appear asking if you wish to apply these values to the current request.

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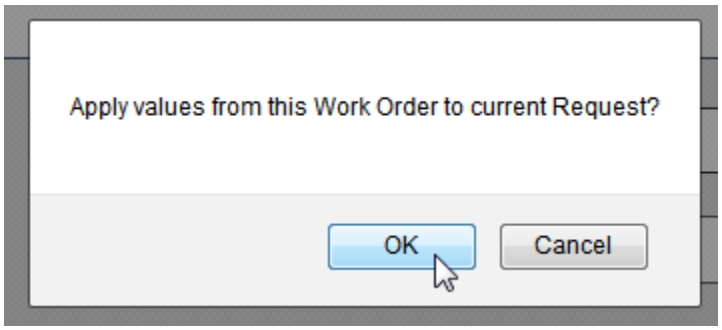

Click *OK* to continue and apply these values or *Cancel* to return to the previous screen.

Once you have entered in any additional information on the New Work Order Menu Panel, you can click the ***Submit Work Order*** button at the bottom of your screen to submit this work order.

4.5.2 Dispatching Results Window

Whenever a work order is submitted, the ***Dispatching Results*** window appears on the screen displaying options to further process this work order.

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Notice at the top of the screen, the *Work Order Identifier* is displayed. This will be the work order number you use to reference this work order in the future.

Click the *Close and Clear* link to be directed to another work order form and submit a new request.

Click the *Close and New* link to be directed to another work order form with the same information as the last submitted request. You might use this if the same work needs to be performed in two different locations, for example.

Click the *My Work Orders* link to view a list of work orders assigned to you.

Click the *Details for Work Order* link to view the full details of this work order.

Notice the Dispatch Actions menu at the bottom of this screen. Use this menu to further process this work order. Hover your mouse over the menu and select the Dispatch Action you would like to apply to this work order.

So, let's say you just entered in a work order. When the *Dispatching Results Window* appears, select ***Assign Employee*** from the *Dispatch Action* menu.

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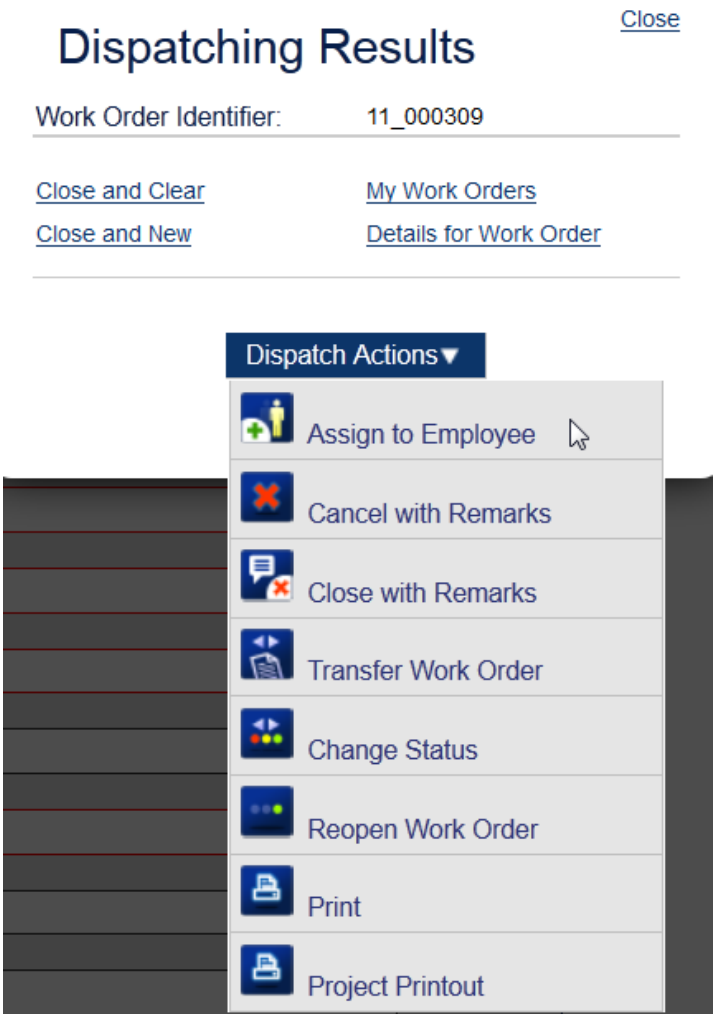

Note: Sprocket is customized based on user needs. Your screen may or may not display the above dispatch actions. Contact your Sprocket Administrator with questions.

You will be directed to the ***Assign Employee*** form. Fill out the appropriate information and click the ***Submit*** button at the bottom left of the screen to process this work order with this *Dispatch Action*.

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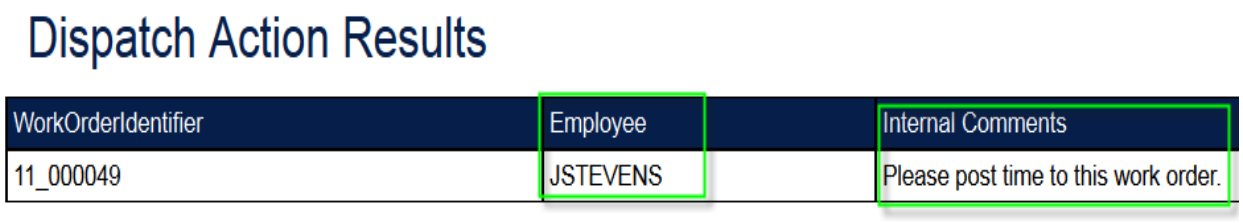
Once you have submitted the *Dispatch Action*, the ***Dispatch Action Results*** window will appear display your results. Notice that the employee we just assigned is now listed for this work order and your remarks have been added to the *Internal Notes* of this work order.



Dispatch Action Results

WorkOrderIdentifier	Employee	Internal Comments
11_000049	JSTEVENS	Please post time to this work order.

4.6 Time Materials Tab

The *Time Materials* tab allows you to track materials and time postings to either work orders or ***TM Accounts(Time Material Accounts)*** . *TM Accounts* are used to track time and materials transactions to events that aren't documented with work orders. For example, supervisors may want to track vacation time, so they may have their employees post time to a *TM Account* called Vacation Time. Along with

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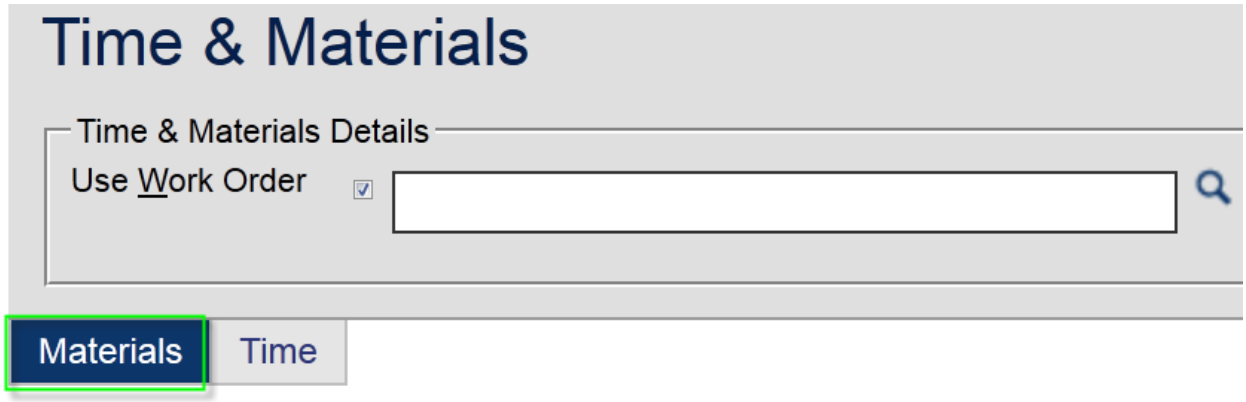
posting time, you can either issue materials to a work order/TM Account or return them from the work order/*TM Account* back to inventory.

4.6.1 Materials

Once you select the *Time Materials* tab, a form will appear for you to begin assigning specified materials to this work order or *TM Account*. Notice that the *Materials* tab his highlighted indicating that we are on the *Materials* tab.



Notice at the top of the screen, there is a field labeled ***Use Work Order***. Use the Auto Lookup Tool to locate and select the desired work order for this *Time Materials* transaction. If you wish to post materials to a *TM Account*, click the checkbox to the left of the field. For this example, let's say we are posting time to a work order. So, in the *Use Work Order* field, begin typing all or part of the work order identifier to locate and select the appropriate work order.

Once you have selected the appropriate work order, begin with *Material Assignment* section at the top of the form and begin filling in the fields with the correct information. Just like any other form in Sprocket, a field that is outlined in red is required.

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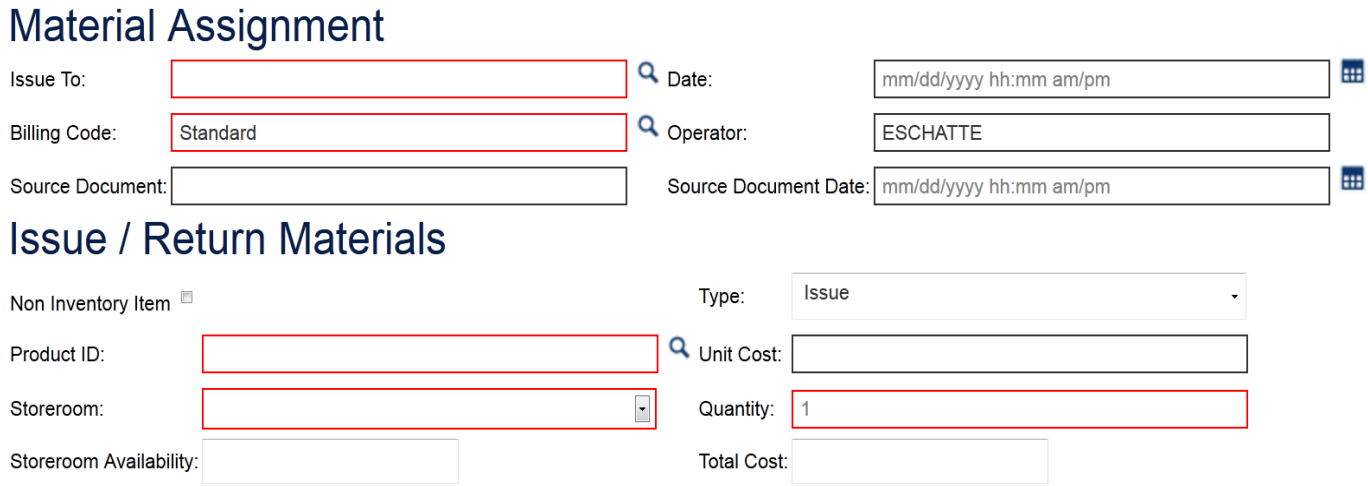
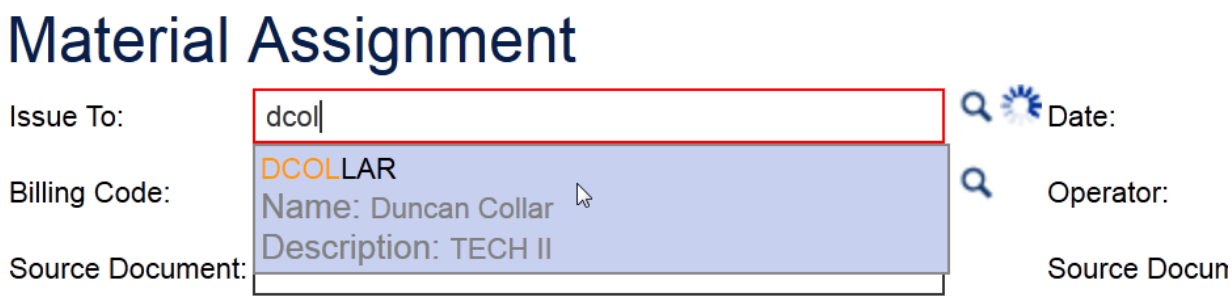


The first section of the form is labeled *Material Assignment*. Start here to document information such as who is checking out the materials and the date they are issued on. Enter your information here. Remember to use the *Auto Lookup Tool* to search for values or begin typing and it will auto complete your entry.



Once you have filled out all of the information in the first section, you may move on to the ***Issue/Return Materials*** section to specify which items you will be using.

To begin, we must first determine if this is an inventory or non-inventory item. If you must go to a store to purchase the appropriate materials, check the *Non Inventory Item* box. The fields in the form will change so that you may enter in the appropriate information.

If you are checking out items from your own inventory, leave the *Non Inventory Item* box unchecked. Let's say we are going to check out an inventory item so leave the box unchecked.

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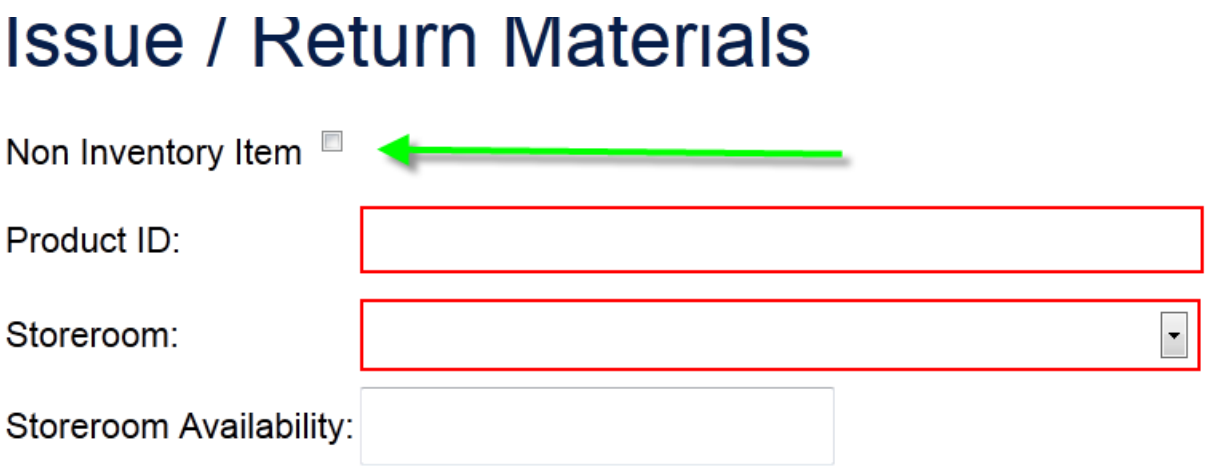
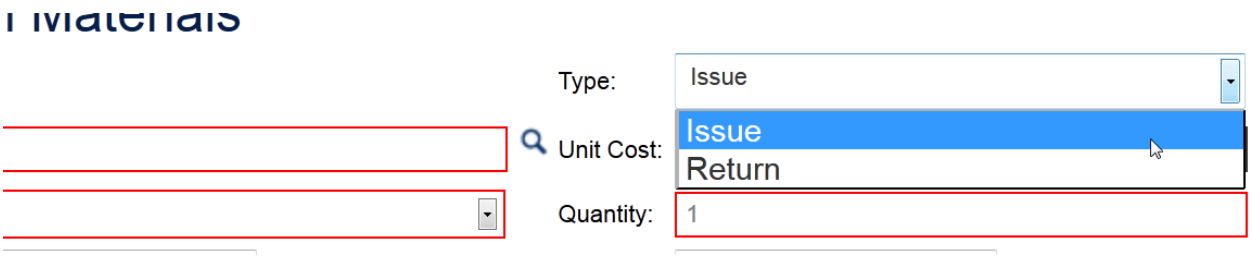


Next, we must determine if this is going to be an issue or return. This means that if we are going to issue materials to use for this work order, we must select *Issue* from the drop down. If we want to return unused items back to inventory, select *Return* from the drop down menu.

Let's say we wish to issue an item from inventory, so in the drop down menu at the right of the form, select *Issue*.



Now that we have determined the type of transaction this will be, we can now locate the correct item to add to this work order. In the ***Product ID*** field, begin typing in all or part of the item you are searching for. Remember, the *Auto Lookup Tool* has an auto complete function that will help locate the appropriate record.

Once the correct record is returned, select it to continue filling out the form.

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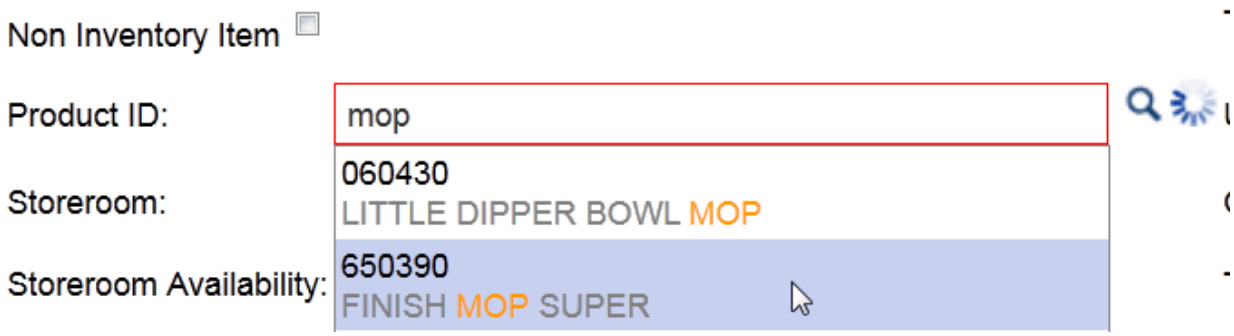
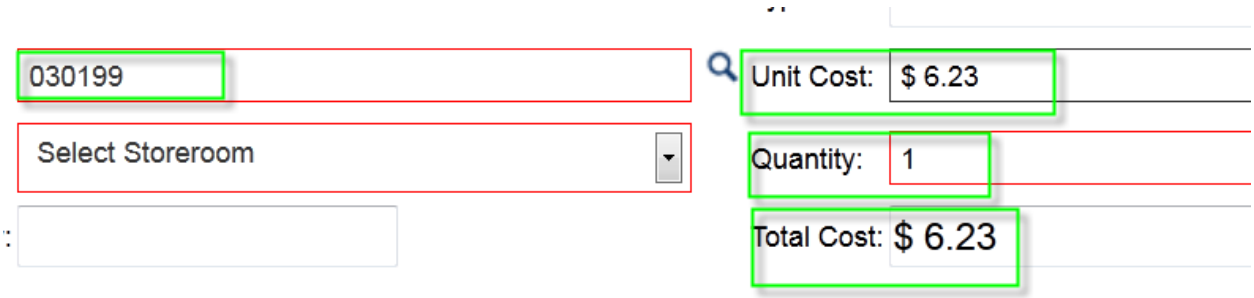
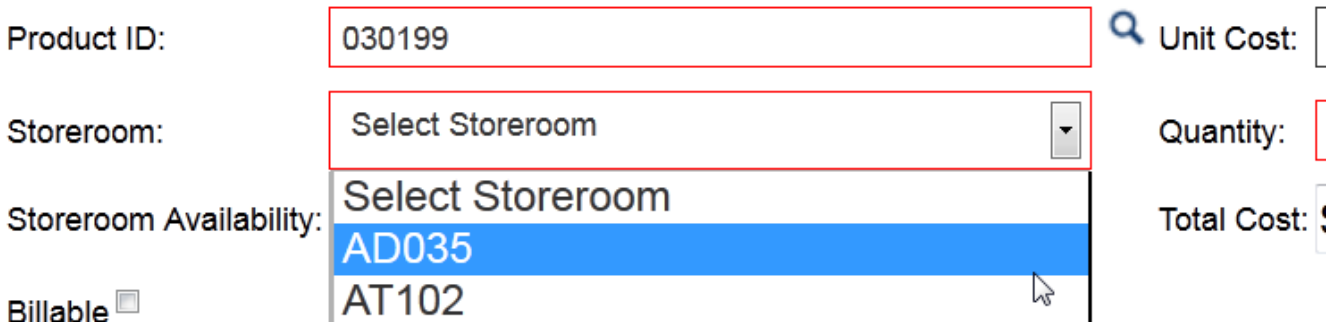
Issue / Return Materials



Notice that once a selection is made, the *Unit Cost* and *Total Cost* fields will automatically populate the correct information for this inventory item. The *Quantity* field will default to 1, so if you need more than one of what you are issuing, be sure to change this to the correct number.



From here, select a storeroom from which you wish to check this item out from the drop down list.



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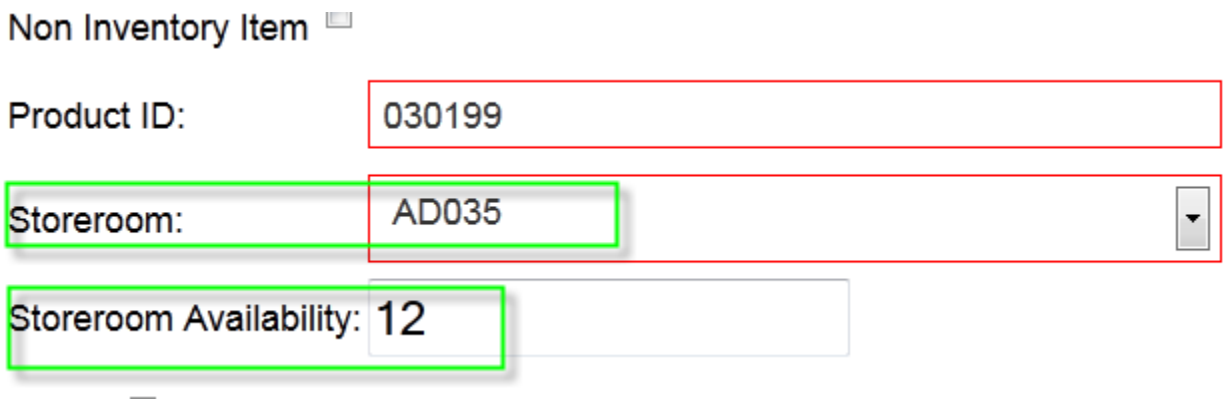
Notice that selecting a storeroom from the drop down list will automatically populate the amount of this item available in the *Storeroom Availability* field.



Before submitting this item to this work order, be sure to check the *Billable* checkbox below the Storeroom availability field if this item will be billable.

Below this section there is a comments field where you can leave any remarks about issuing this item. Click inside the *Comments* box to enter any remarks, the click the ***Save Material*** button at the bottom left of the screen to issue this material to this work order.

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Storeroom: AD035

Storeroom Availability: 12

Billable

I may need an extra mop for this work order.

Save Material

Notice in the ***Material Charges*** section at the bottom of the page, the grid has been updated to include this transaction. This section will show all materials transactions throughout the life of this work order.

Material Charges

Product Like

Trans Date On or After mm/dd/yyyy hh:

Trans Date On or Before mm/dd/yyyy hh:mm am/pm

Issue To Like

Search

Product ID	Description	Comments	QTY	Storeroom	Unit Price	Total Price	Issue To
030199		Comments	1	AD035	$ 6.23	$ 6.23	Jake Stevens

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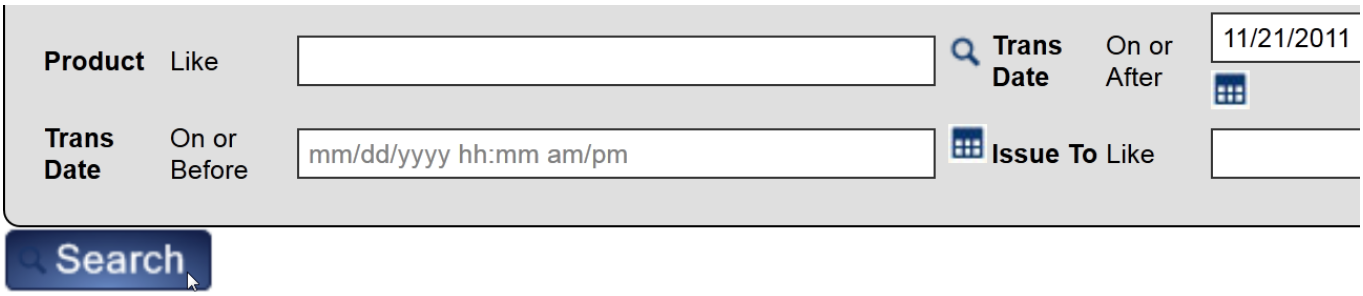
You can use the search fields above the grid in the *Material Charges* section to search for and locate specific materials transactions. Simply use the desired field(s) to search for transaction. For example, let's say we want to search for all materials transactions to this work order made on or after *November 21, 2011*. Enter that date into the ***Trans Date On or After*** field and click the ***Search*** button at the bottom left of the section.



Now this will show all the materials transactions made on or after our specified date in the grid below the search criteria.

Product ID	Description	Comments	QTY	Storeroom	Unit Price	Total Price	Issue To
030199		Comments	1	AD035	$ 6.23	$ 6.23	Jake Stevens
NS-02096	Piping	Comments	1	NonStock	$ 14.59	$ 14.59	Garth Udy
030199		Comments	2	BB208C	$ 6.23	$ 12.46	Deone Heap

If you ever wish to delete a material posting, click the Delete link of the transaction you wish to remove.

Issue To	Transaction Date	Delete
Jake Stevens	11/22/2011 2:00:39 PM	Delete
Garth Udy	11/22/2011 2:12:23 PM	Delete
Deone Heap	11/22/2011 2:24:58 PM	Delete

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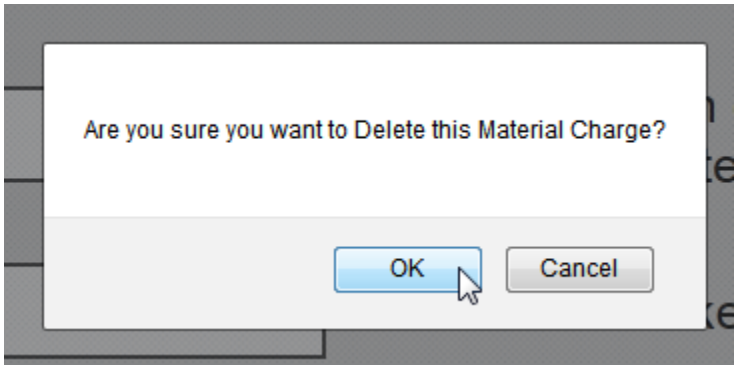
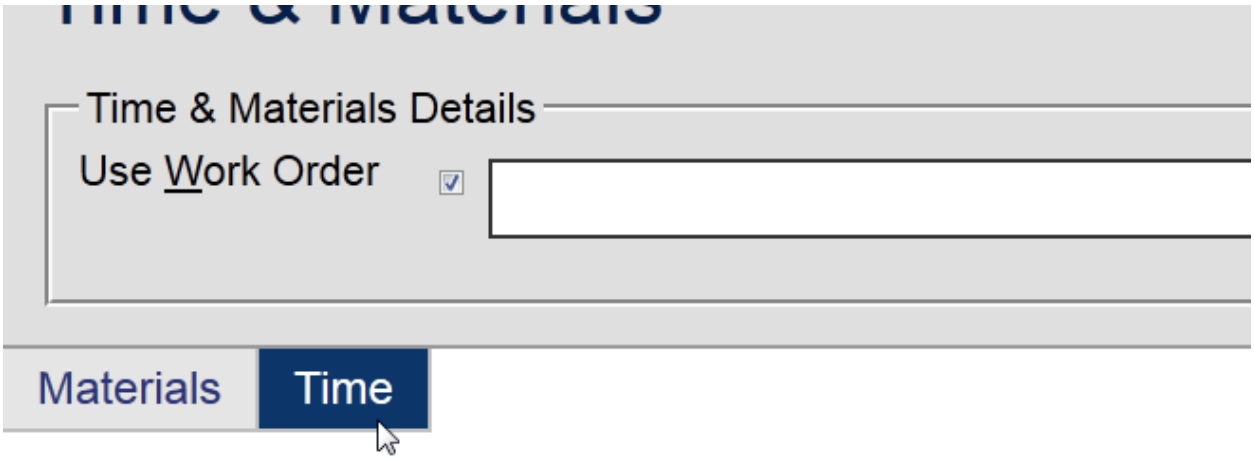
A window will appear saying " *Are you sure you wish to delete this Material Charge?"* Click *OK* to continue or *Cancel* to return to the previous screen.



The grid will refresh and your deleted material transaction will no longer be displayed in the material charges.

4.6.2 Time

Much like the *Materials* tab, the ***Time*** tab is meant to be able to document time transactions throughout the life of a work order. To post time to a work order or *TM Account*, click the Time tab at the top of the page. Clicking the *Time* tab will display a form for employees to fill out to post time to a work order.



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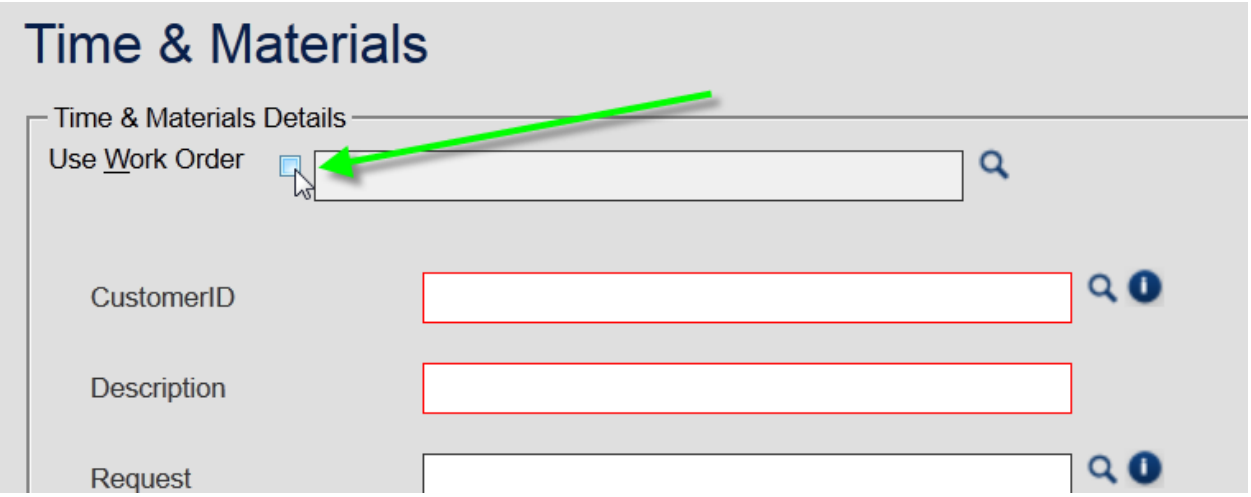
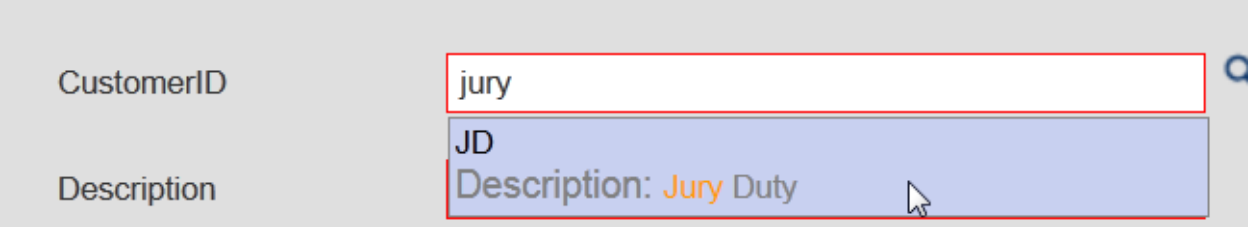
Let's say for this example that we want to post time to a *TM Account* called Jury Duty. To do this, instead of entering a work order identifier, uncheck the check box next to the *Use Work Order* field.



Notice that a new form appears below. Here, you can enter in the information to post time to your *TM Account*. Remember that fields outlined in red are required fields.

Use the ***CustomerID*** field to locate and select the appropriate *TM Account*. Remember, the *Auto Lookup Tool* can help you locate records in Sprocket. Begin typing all or part of the *TM Account* you wish to post time to. When the correct record appears, select it and continue.



Continue filling out the rest of your *TM Account* form with the correct information. Remember that red fields are required.

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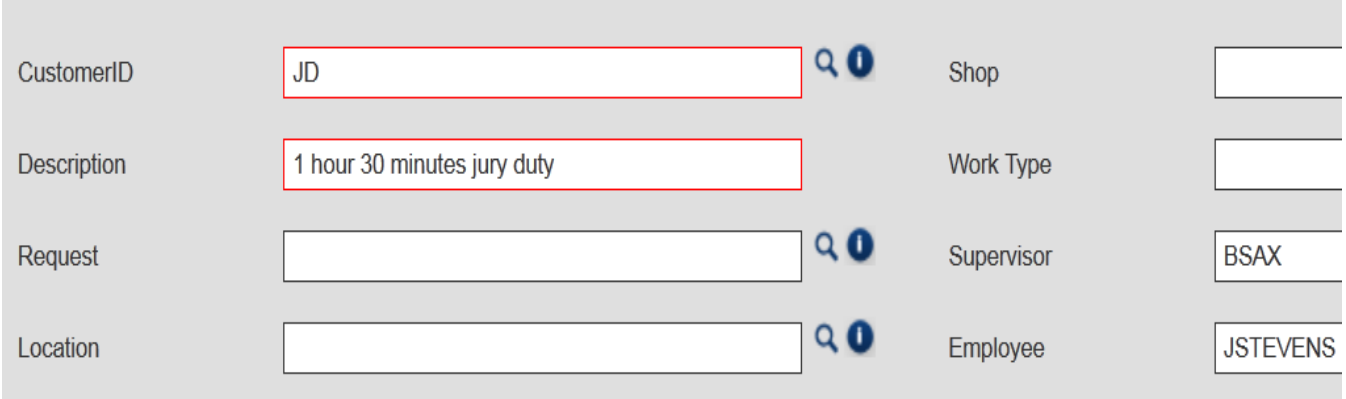
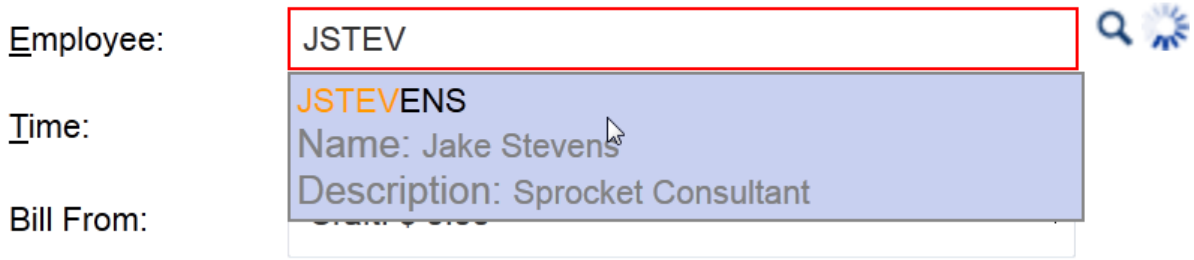
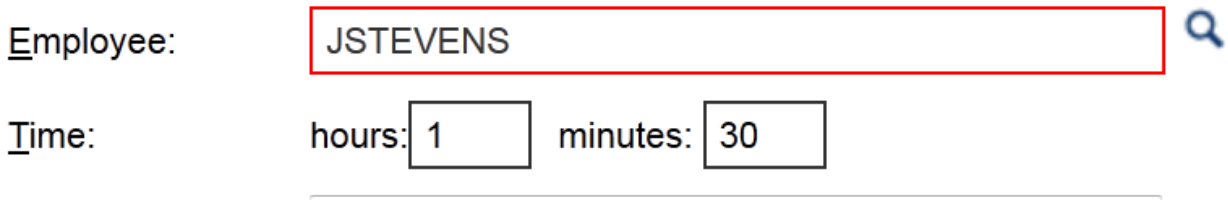


Once you have entered in the TM Account information at the top of the form, fill in the rest of the information on this screen.



Once you have selected the desired employee, enter in the hours and minutes you wish to post in the ***Time*** field below.



Fill in the other fields as necessary with the appropriate information. Once you have entered in all of your information, you may leave comments about this time posting in the *Remarks* box below.

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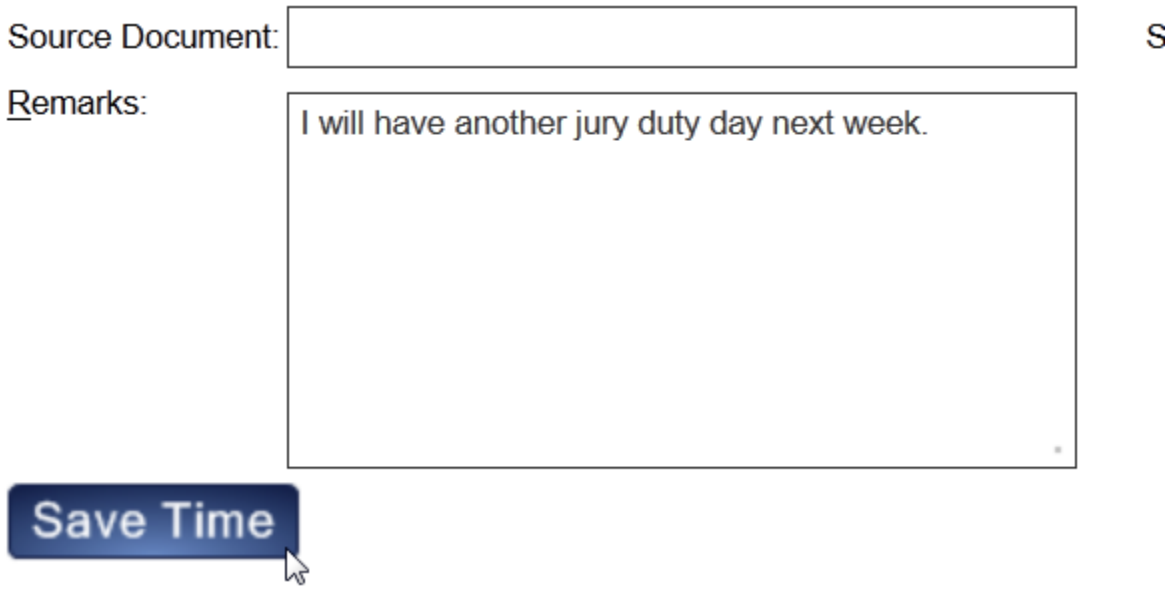
Click ***Save Time*** at the bottom of the form when you wish to submit your time posting.



Notice in the ***Time Charges*** section at the bottom of the page, the grid has been updated to include this transaction. This section will show all time transactions throughout the life of this work order.

Search

TransactionDate	Employee	Comments	WageCode	Hours	MultipliedWageRate	Total Wage	BillingCode
11/22/2011 12:00:00 AM	JSTEVENS	Comments	Regular	1h : 30m	$ 0.00	$0.00	Standard
				sum: 1h : 30m		**sum: $0.00**	

You can use the search fields above the grid in the *Time Charges* section to search for and locate specific time transactions. Simply use the desired field(s) to search for a transaction. For example, let's say we want to search for all time transactions to this *TM Account* or work order made on or after *November 21, 2011*. Enter that date into the ***Trans Date On or After*** field and click the ***Search*** button at the bottom left of the section.

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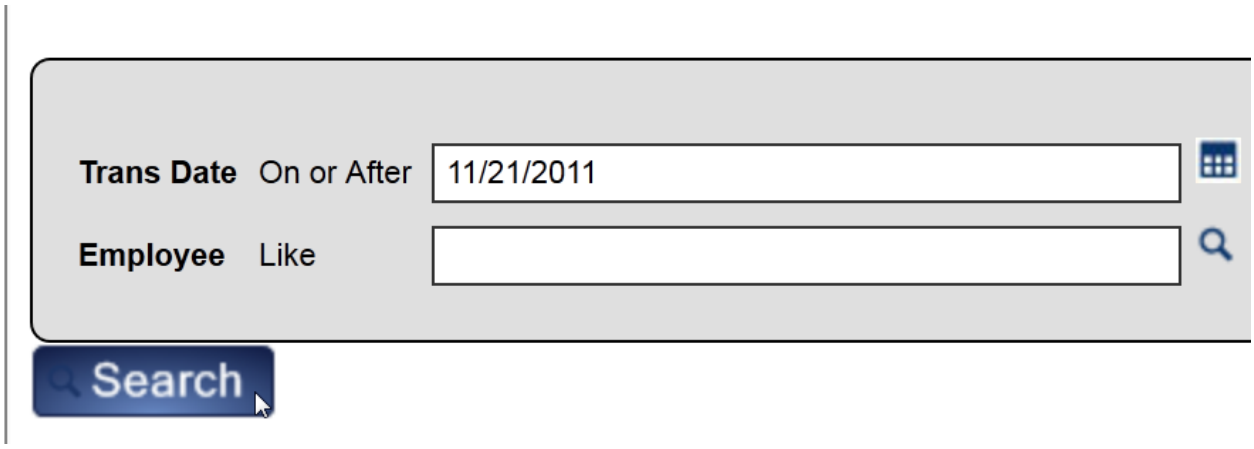

Now this will show all the time transactions made on or after our specified date in the grid below the search criteria.

If you ever wish to delete a time posting, simply scroll to the far right of the grid and click the ***Delete*** link for the time transaction you wish to delete.

BillingCode	MultiplieBillingRate	Total Billing	SourceDoc	SourceDocDate	Delete
Standard	$ 0.00	$0.00			Delete
Standard	$ 0.00	$0.00			Delete

A window will appear saying " *Are you sure you wish to delete this Time posting?"* Click *OK* to continue or *Cancel* to return to the previous screen.

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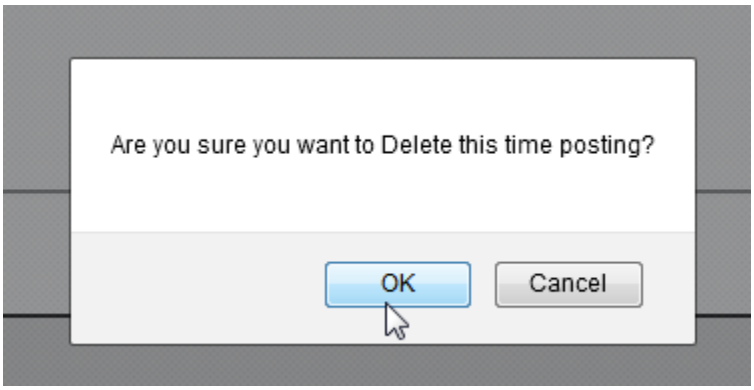

The grid will refresh and your deleted time transaction will no longer be displayed in the time charges.

5.0 Work Order Details

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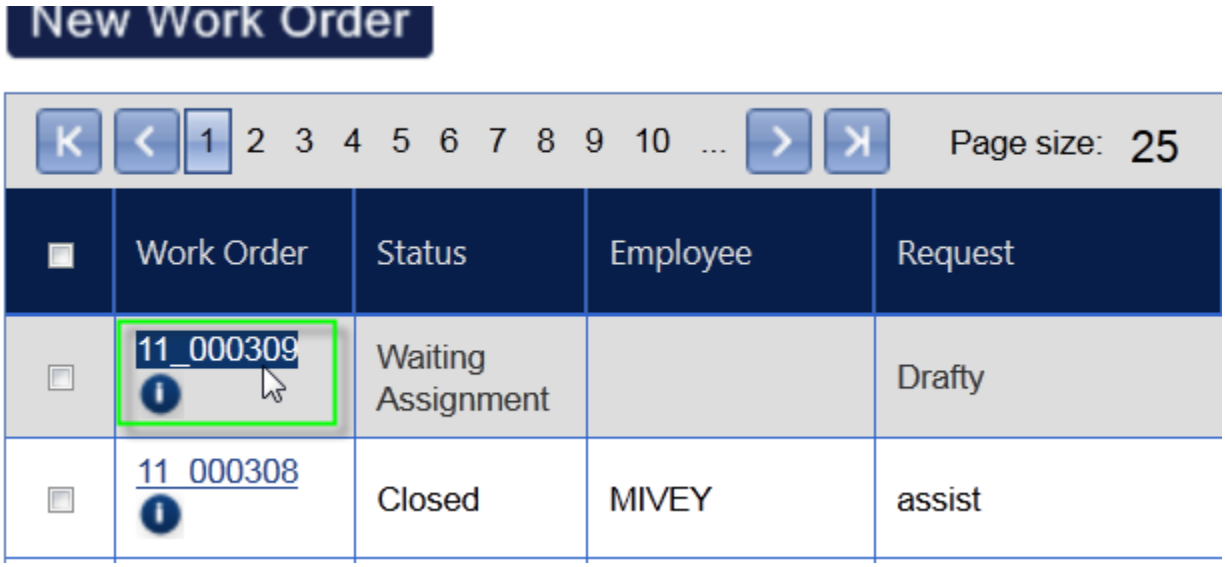
5.1 Navigating to Work Order Details

You can view *Work Order Details* by clicking the *Work Order Identifier* from a work order grid.



This will bring you to the ***Work Order Details*** screen. This screen displays all details for this particular work order. Notice that there are additional fields here that were not on the *New Work Order* screen. Here you can enter in additional information or update original information

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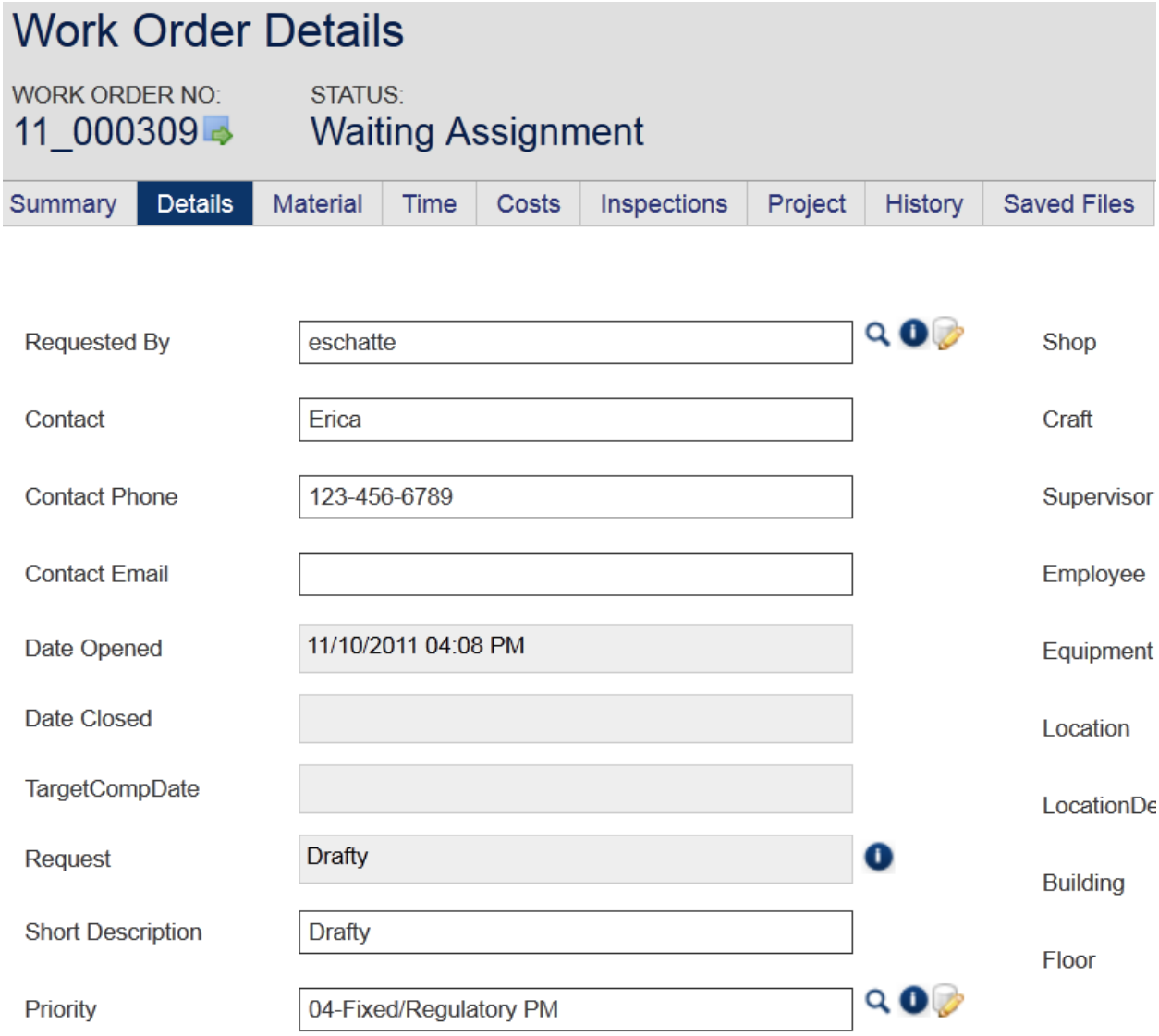

Note: Sprocket is customized based on customer needs. Your screen may or may not display the above fields. Contact your Sprocket Administrator with questions.

Notice that the top of the page displays the *Work Order Identifier*, the *Status* of this work order, and the *Details* tab is highlighted indicating that we are viewing *Work Order Details*.

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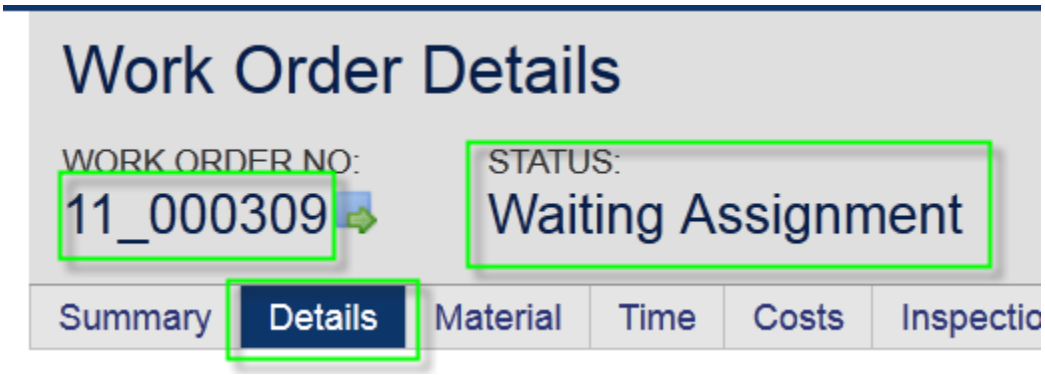
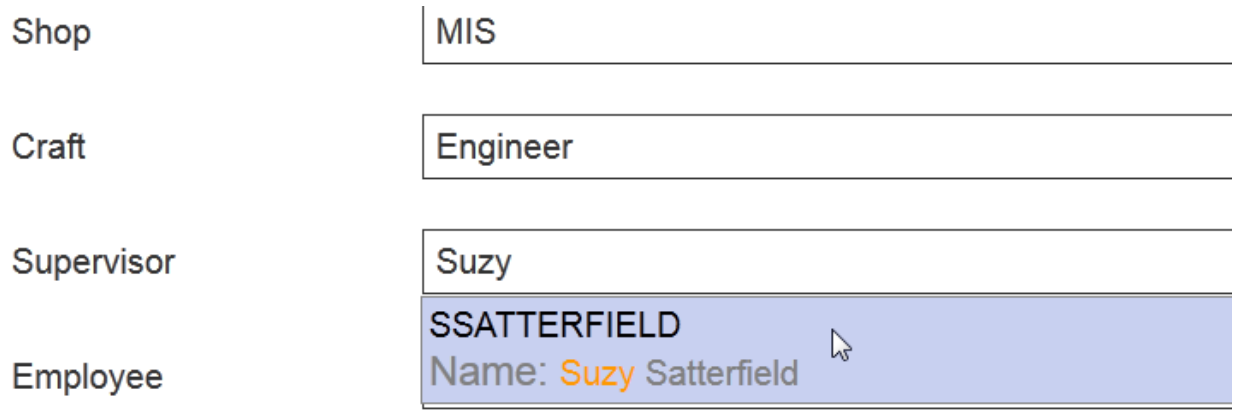


Notice that you are able to add additional information to this work order. Simply click the field you wish to add contents to and enter in the information. For example, let's say you would like to add a Supervisor to a work order. Click inside the *Supervisor* field and enter in all or part of the name of the supervisor. The *Auto Lookup Tool* will yield search results.



Once you have entered in any additional information to the *Work Order Details*, click the ***Save*** button in the upper right hand corner to save your changes.

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Notice the other two buttons: ***Save and Exit*** and ***Exit***. You will see these buttons throughout Sprocket in any form with fields that you are able to edit. Use *Save* to save work you have completed. Use *Save and Exit* to save work you have completed and exit to the previous screen. Use *Exit* to exit the screen without saving changes.

5.2 Work Order Notes

Remember that whenever you submit a new work order you can also submit comments with it as well. Notice at the bottom of the page, there is a note section.

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New Note

Note	User	CreateDate	Delete
I need assistance with installation of new door handle.	SysUser Temp	11/11/2011 12:47:55 PM	Delete

New Internal Note

Note	User	CreateDate	Delete
No Records To Display			

New Closing Note

Note	User	CreateDate	Delete
No Records To Display			

Sprocket has three types of notes that can be included with work orders:

- ***Notes***-Comments included when work order is submitted
- ***Internal Notes***-Comments added throughout work order life cycle
- ***Closing Notes***-Comments added when a work order is closed

Notice that the top note field is labeled *Note*. The comments in this field were added by the person who submitted this work order.

The next field below is labeled *Internal Notes* and the bottom field is labeled *Closing Notes*.

To add a new note to any of these fields, click the link above the upper left hand corner of any of these fields.

So, to add a new note to the *Notes* field, click the ***New Note*** link at the upper left hand corner of the field.

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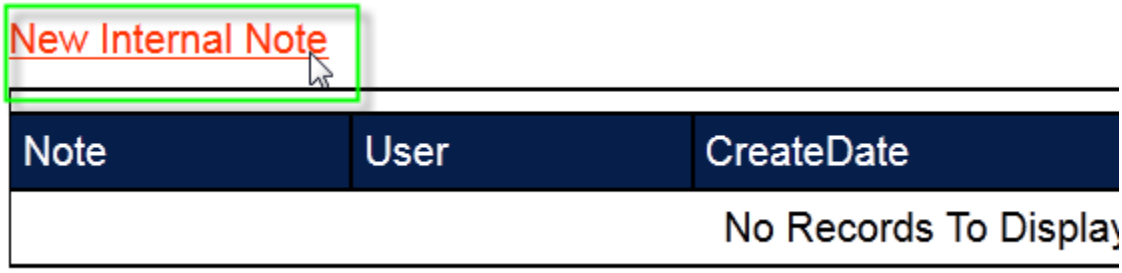
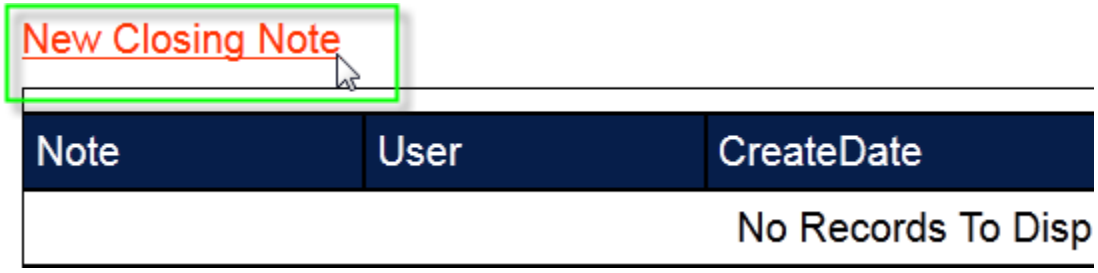
To add a new internal note to the *Internal Note* field, click the ***New Internal Note*** link at the upper left hand corner of the field.



To add a new closing note to the *Closing Notes* field, click the ***New Closing Note*** at the upper left hand corner of the field.



Once you have selected the *New Note* link for one of these fields, you will be redirected to a large free text field.

Begin entering the comments, description, or instructions here.

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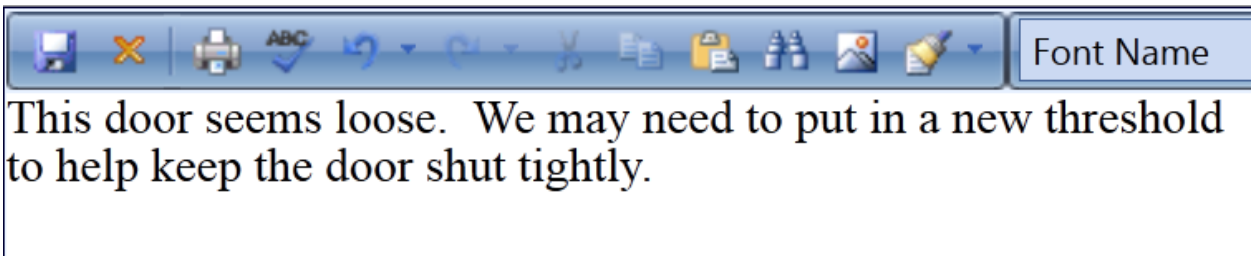

You may enter as much information as you need to in the comments field. Once you have finished entering your note, click the save disc icon in the upper left hand corner of the screen.

If you wish to cancel this note and return to the previous screen, click the red X icon to cancel.

Now the comments you entered will appear in the appropriate field.

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New Note

Note	User	CreateDate	Delete
I need assistance with installation of new door handle.	SysUser Temp	11/11/2011 12:47:55 PM	Delete

New Internal Note

Note	User	CreateDate	Delete
This door seems loose. We may need to put in a new threshold to help keep the door shut tightly.	Erica Schatte	11/11/2011 3:27:11 PM	Delete

New Closing Note

Note	User	CreateDate	Delete
No Records To Display			

If you would like to edit a note, click on the note text and you will be directed back the text field.

New Note

Click Here

Note	User
I need assistance with installation of new door handle.	SysUser Temp

Once back at the text field, you can edit the note or add additional text. When finished, click the *Save* icon at the top left of the screen to save your comments.

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You will be returned to the *Work Order Details* screen and your comments will be updated. If you wish to delete a note, click the ***Delete*** link at the far right of the note grid.

New Note

Note	User	CreateDate	Delete
I need assistance with installation of new door handle.	SysUser Temp	11/11/2011 12:47:55 PM	Delete

Be sure to always click the *Save* button in the upper right hand corner of your screen before exiting this screen to update all *Work Order Details* fields.

5.3 Work Order Details Dispatch Actions

Just like the *Manage Overview* screen and the *Dispatching Results* window, you can also use *Dispatch Actions* from the *Work Order Details* screen. To do this, hover your mouse over the *Dispatch Actions* button at the top right of the screen.

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Note: Sprocket is customized based on customer needs. Your screen may or may not display the above dispatch actions. Contact your Sprocket Administrator with questions.

From here select the dispatch action you would like to use and submit it to update this work order.

So, for example, if you wanted to assign an employee to this work order, you would select the ***Assign Employee*** dispatch action.

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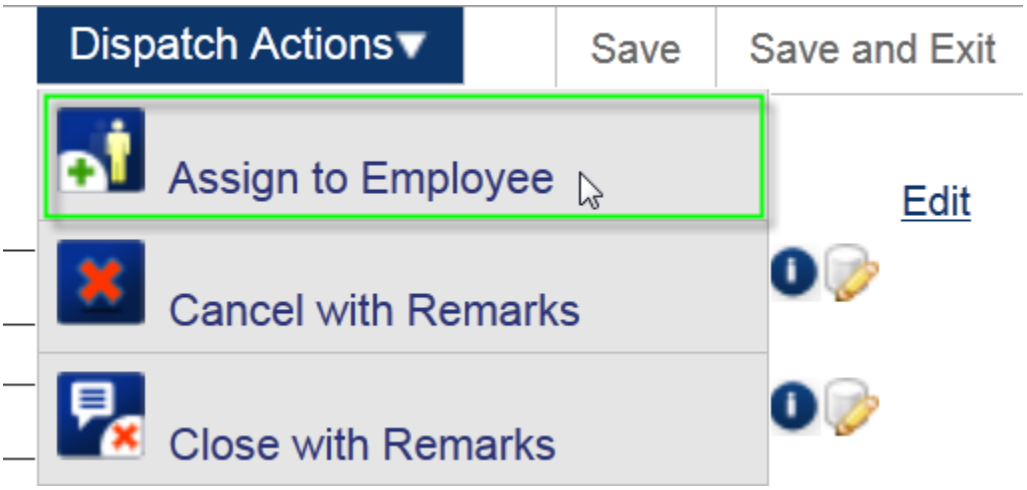
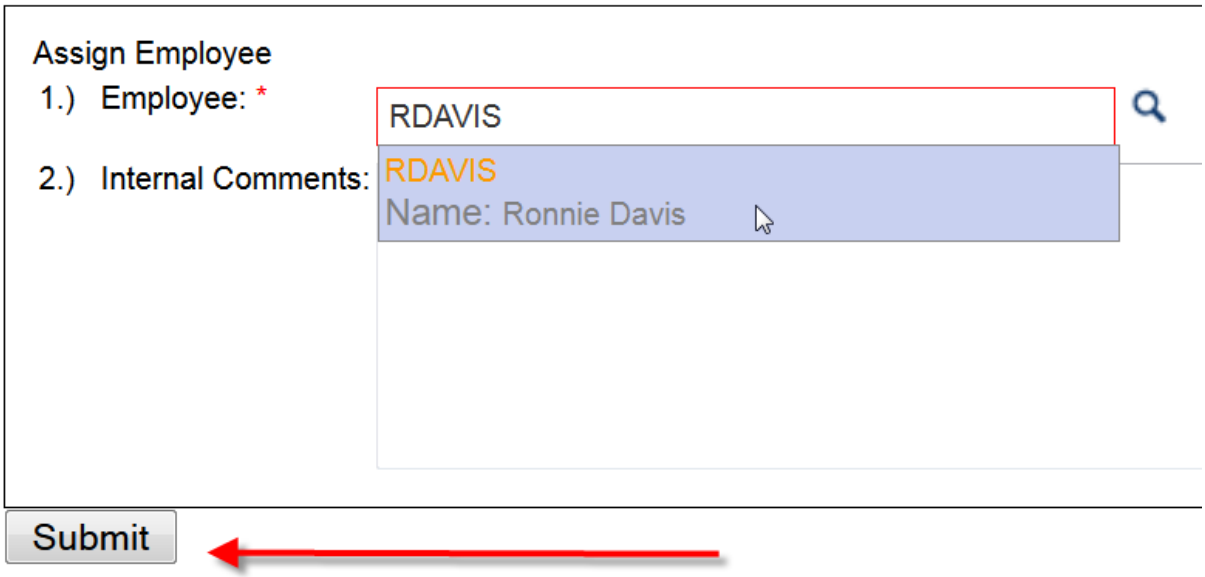


From here, fill out the appropriate fields and submit the dispatch action.



5.4 Work Order Details Tabs

Now that you are familiar with the *Work Order Details*, notice that tabs across the top of the page. Notice that the Details tab is highlighted. This indicates that the Work Order Details screen is being displayed.

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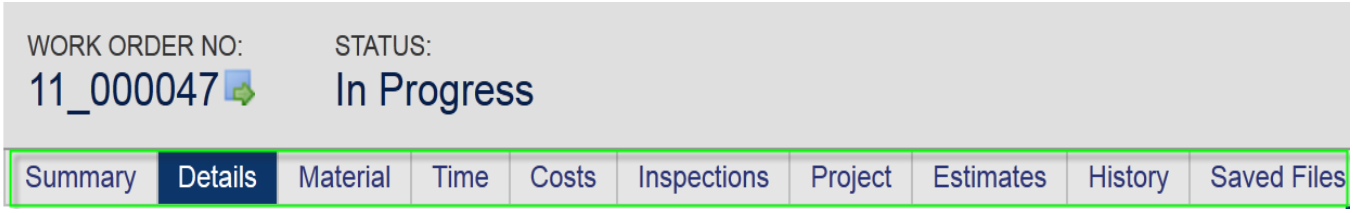

Note: Sprocket is customized based on customer needs. Your screen may or may not display the above tabs. Contact your Sprocket Administrator with questions.

5.4.1 Summary Tab

Starting from left to right, click each tab and familiarize yourself with what each one does. First, select the *Summary* tab.

HIDE DISPATCH SUMMARY

Field	Value	Escalation Points
ActionLogID	Default Action Log	0
Requested By	ESCHATTE	0
Request	LIGHT OUT	0
Location	AC	0
Supervisor	ESCHATTE	0
Employee	EWESTBERG	0
RequestType	Work Order	0

This tab displays a chart with basic information about this work order such as *Request*, *Employee*, and *Supervisor*.

5.4.2 Details Tab

By now you should be familiar with the *Details* tab. This screen displays the full information for this work order and allows you to add or update additional information, add comments or notes, and process with *Dispatch Actions.*

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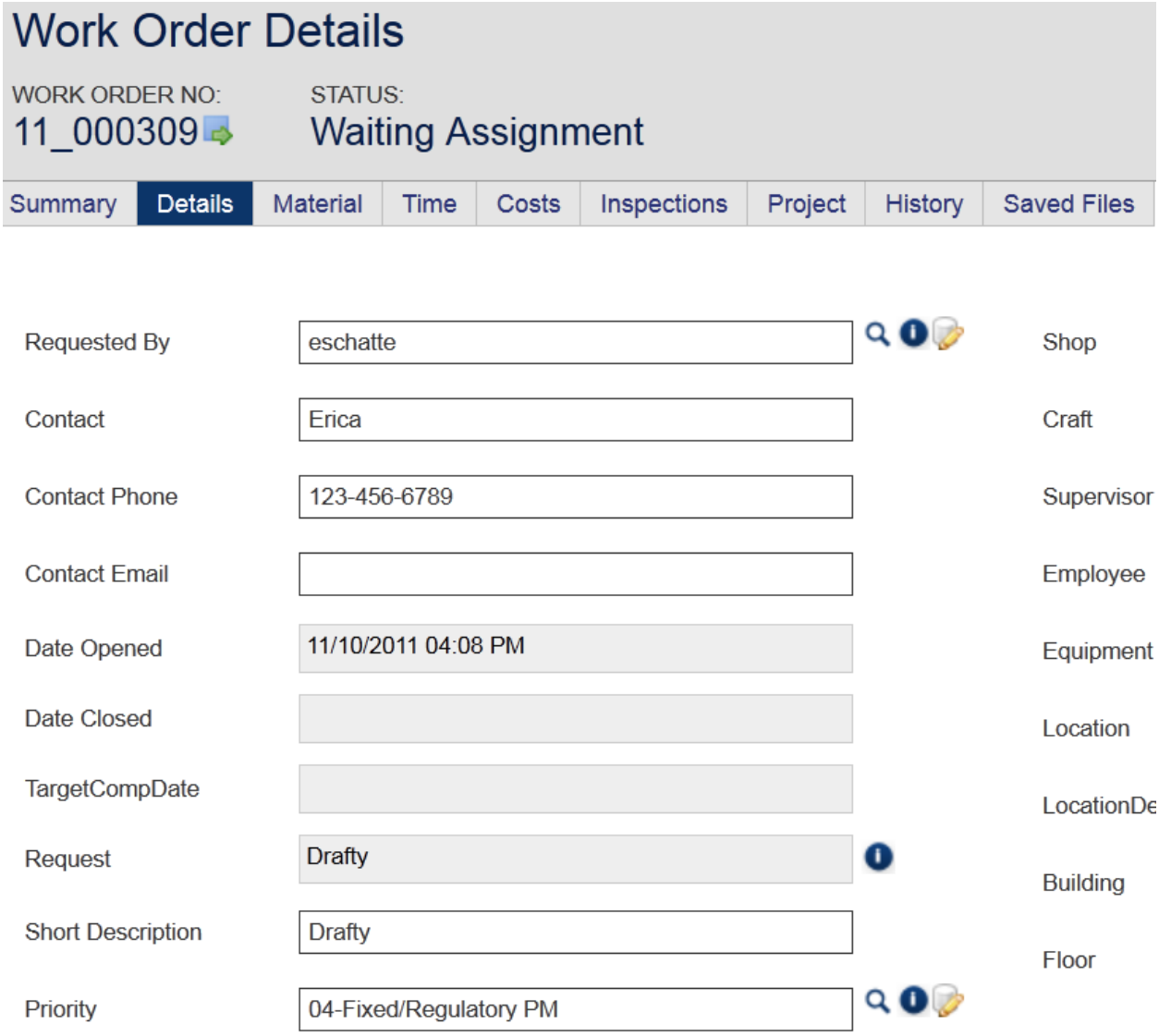

Note: Sprocket is customized based on customer needs. Your screen may or may not display the above fields. Contact your Sprocket Administrator with questions.

5.4.3 Materials Tab

The *Materials* tab allows you to document the inventory items used for this particular work order. You can either issue materials to the work order or return them from the work order back to inventory.

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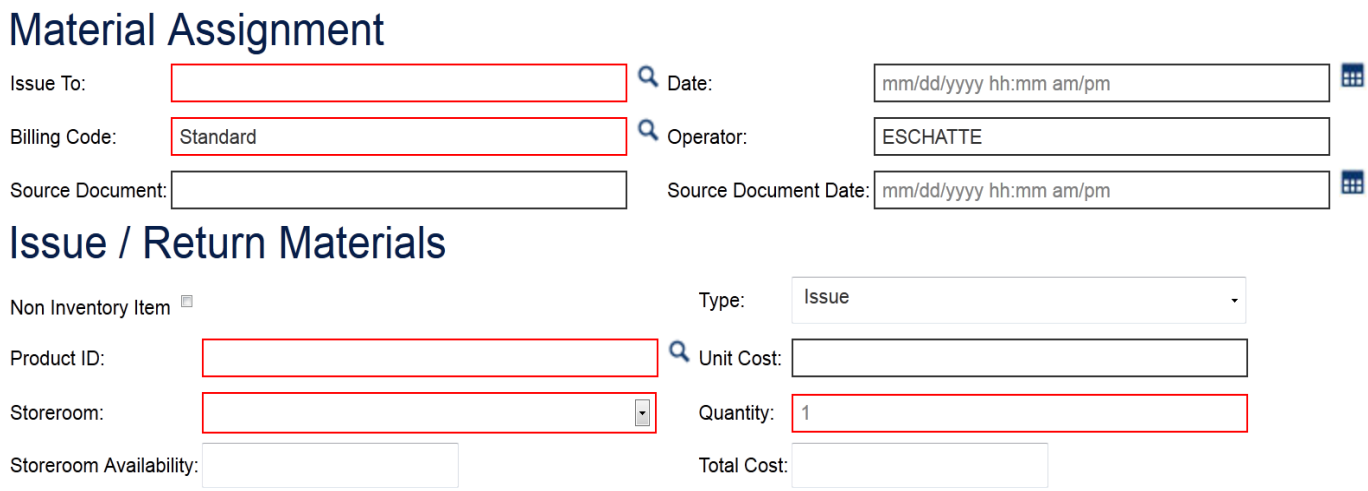
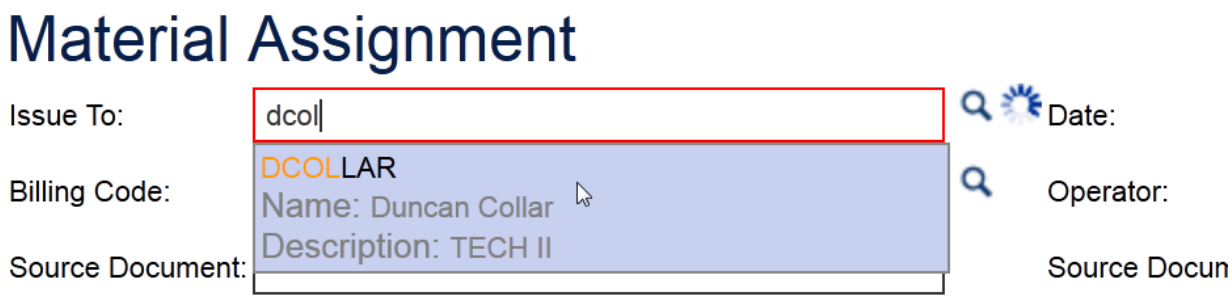
Once you select the *Materials* tab, a form will appear for you to begin assigning specified materials to this work order. Just like any other form in Sprocket, a field that is outlined in red is required.



The first section of the form is labeled Material Assignment. Start here to document information such as who is checking out the materials and the date they are issued on. Enter your information here. Remember to use the *Auto Lookup Tool* to search for values or begin typing and it will auto complete your entry.



Once you have filled out all of the information in the first section, you may move on to the ***Issue/Return Materials*** section to specify which items you will be using.

To begin, we must first determine if this is an inventory or non-inventory item. If you must go to a store to purchase the appropriate materials, check the *Non Inventory Item* box. The fields in the form will change so that you may enter in the appropriate information.

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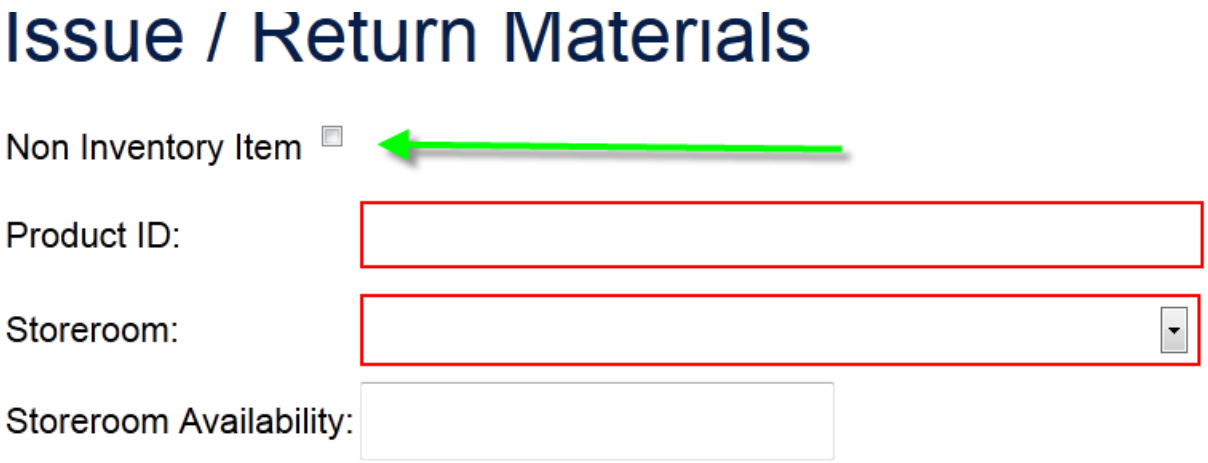
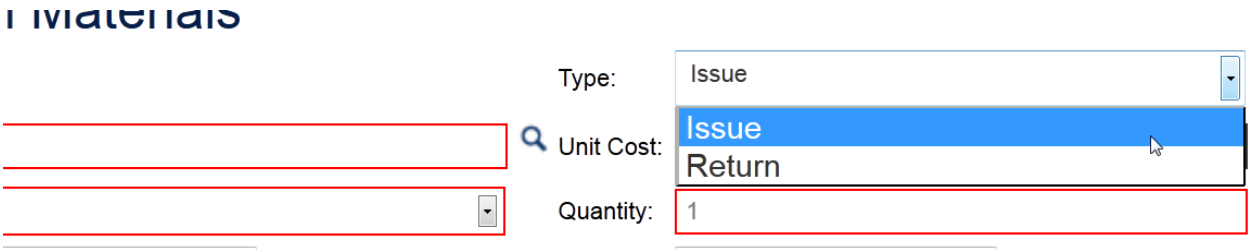
If you are checking out items from your own inventory, leave the *Non Inventory Item* box unchecked. Let's say we are going to check out an inventory item so leave the box unchecked.



Next, we must determine if this is going to be an issue or return. This means that if we are going to issue materials to use for this work order, we must select *Issue* from the drop down. If we want to return unused items back to inventory, select *Return* from the drop down menu.

Let's say we wish to issue an item from inventory, so in the drop down menu at the right of the form, select *Issue*.



Now that we have determined the type of transaction this will be, we can now locate the correct item to add to this work order. In the ***Product ID*** field, begin typing in all or part of the item you are searching for. Remember, the *Auto Lookup Tool* has an auto complete function that will help locate the appropriate record.

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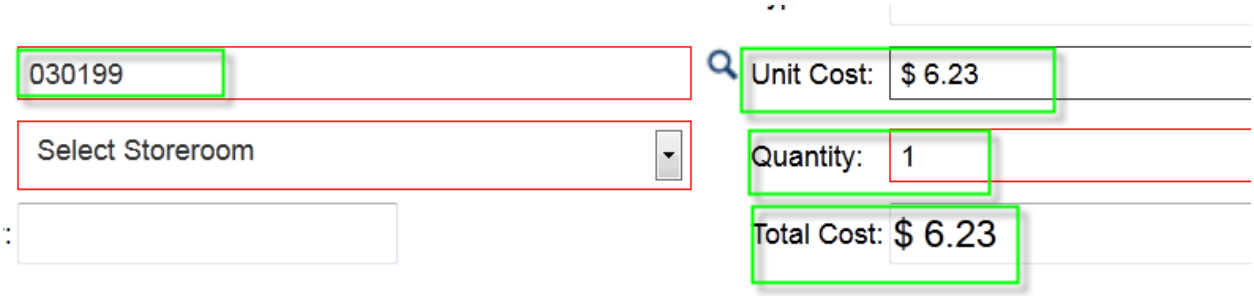
Once the correct record is returned, select it to continue filling out the form.

Notice that once a selection is made, the *Unit Cost* and *Total Cost* fields will automatically populate the correct information for this inventory item. The *Quantity* field will default to 1, so if you need more than one of what you are issuing, be sure to change this to the correct number.



From here, select a storeroom from which you wish to check this item out from the drop down list.

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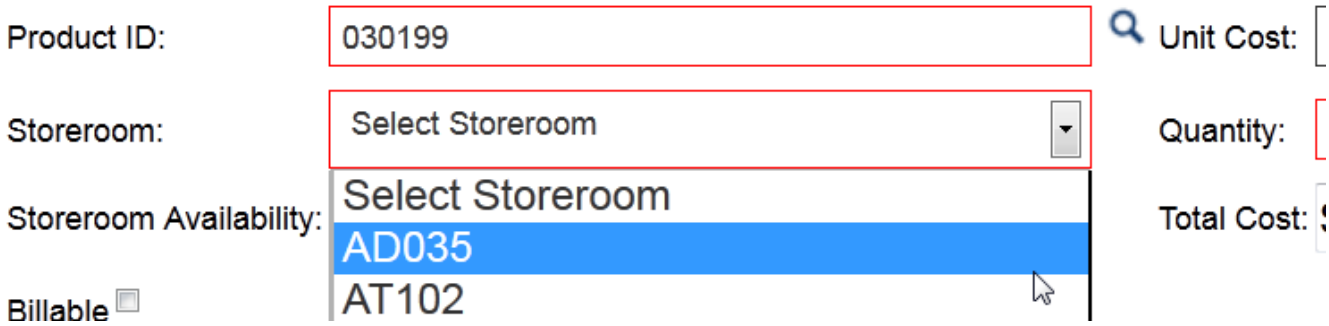
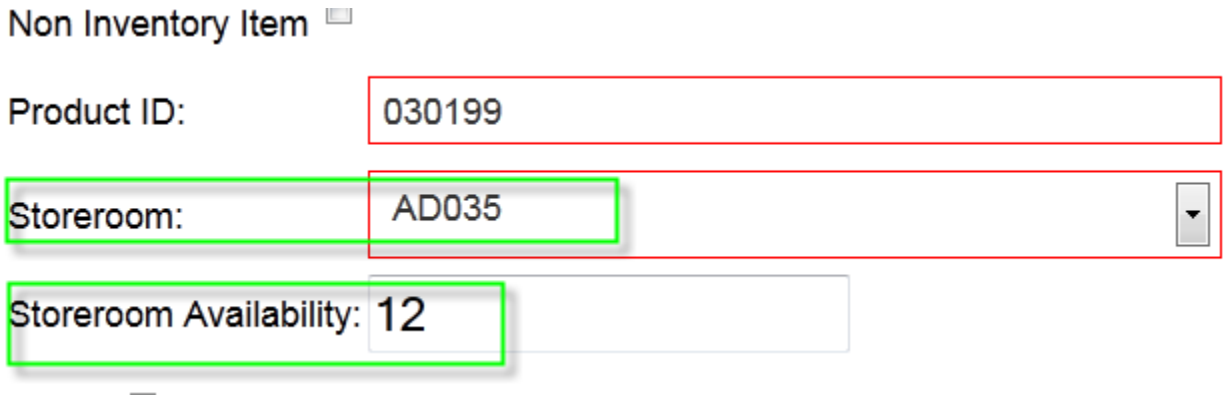


Notice that selecting a storeroom from the drop down list will automatically populate the amount of this item available in the *Storeroom Availability* field.



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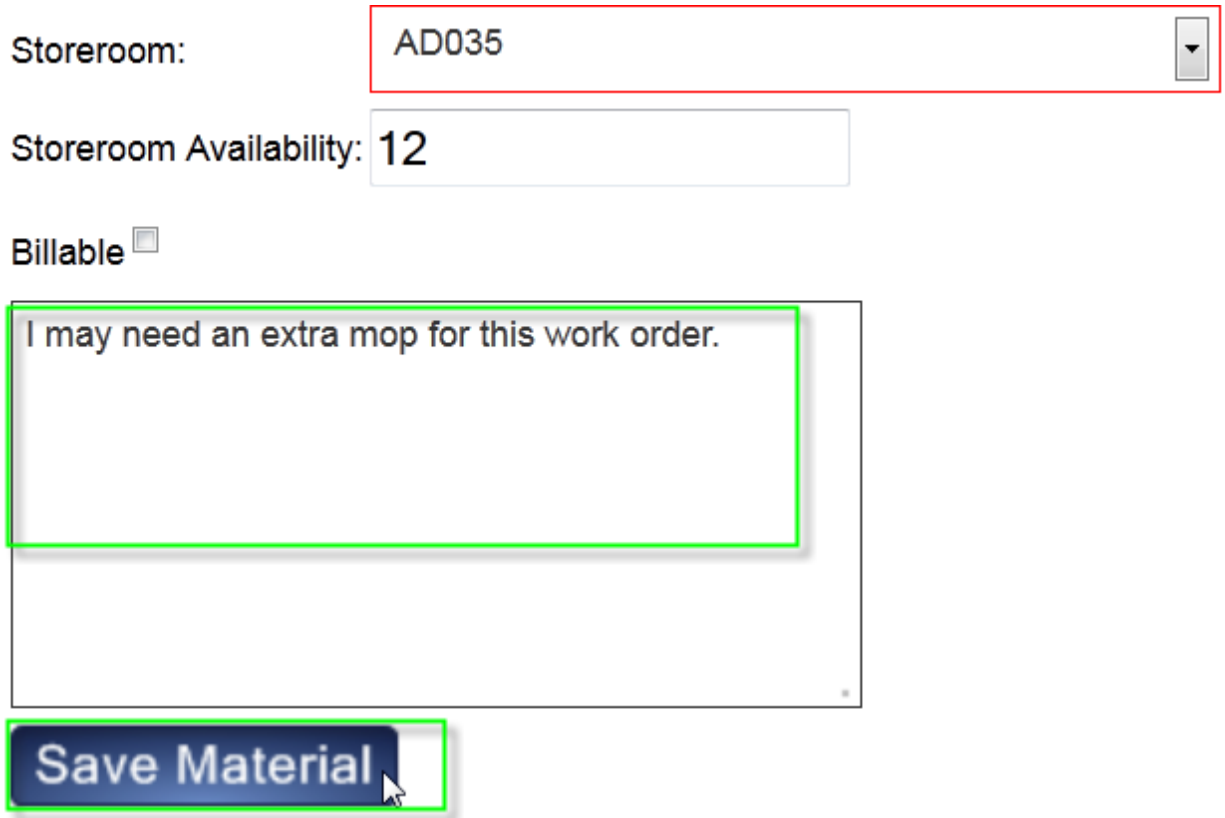
Before submitting this item to this work order, be sure to check the *Billable* checkbox below the Storeroom availability field if this item will be billable.

Below this section there is a comments field where you can leave any remarks about issuing this item. Click inside the *Comments* box to enter any remarks, the click the ***Save Material*** button at the bottom left of the screen to issue this material to this work order.



Notice in the ***Material Charges*** section at the bottom of the page, the grid has been updated to include this transaction. This section will show all materials transactions throughout the life of this work order.

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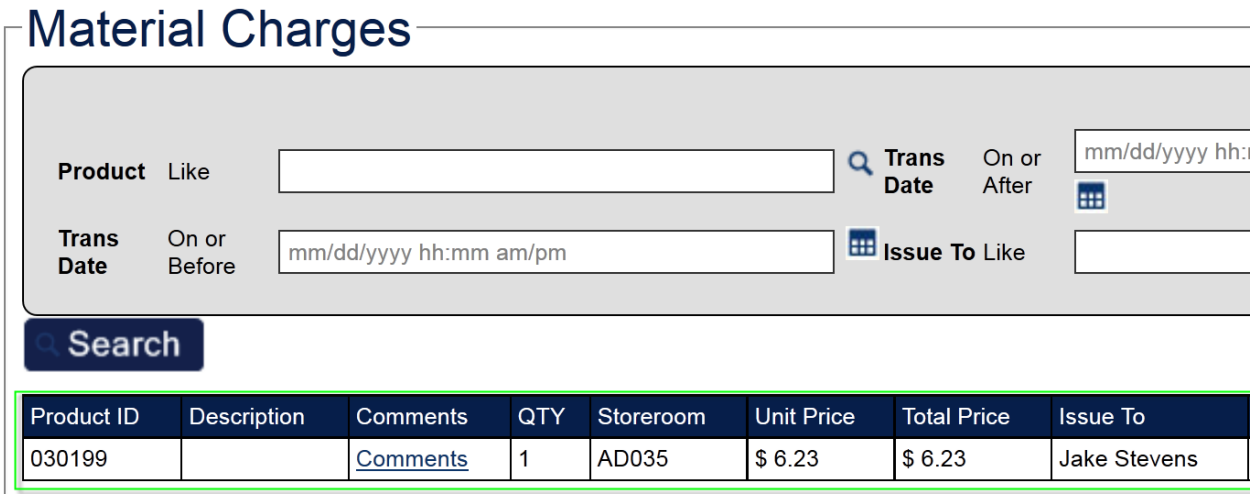
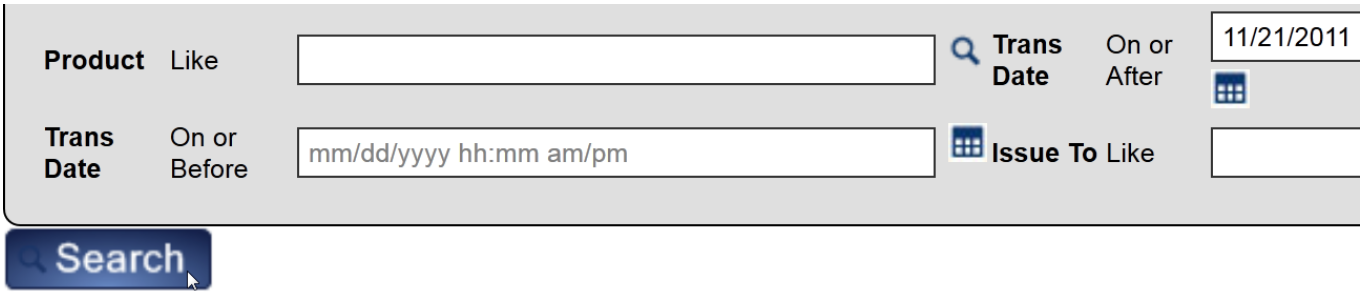


You can use the search fields above the grid in the *Material Charges* section to search for and locate specific materials transactions. Simply use the desired field(s) to search for transaction. For example, let's say we want to search for all materials transactions to this work order made on or after *November 21, 2011*. Enter that date into the ***Trans Date On or After*** field and click the ***Search*** button at the bottom left of the section.



Now this will show all the materials transactions made on or after our specified date in the grid below the search criteria.

Product ID	Description	Comments	QTY	Storeroom	Unit Price	Total Price	Issue To
030199		Comments	1	AD035	$ 6.23	$ 6.23	Jake Stevens
NS-02096	Piping	Comments	1	NonStock	$ 14.59	$ 14.59	Garth Udy
030199		Comments	2	BB208C	$ 6.23	$ 12.46	Deone Heap

If you ever wish to delete a material posting, click the Delete link of the transaction you wish to remove.

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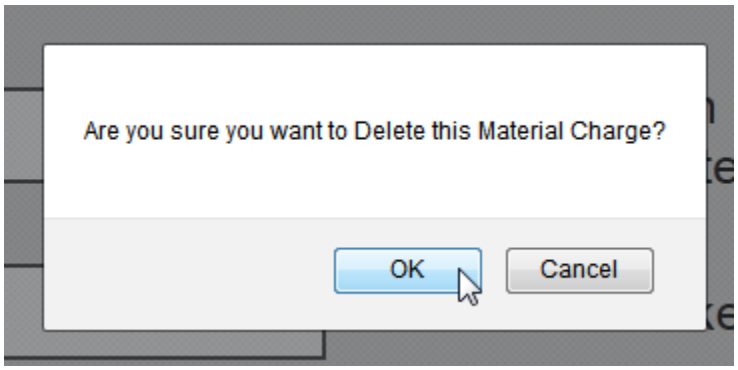
Issue To	Transaction Date	Delete
Jake Stevens	11/22/2011 2:00:39 PM	Delete
Garth Udy	11/22/2011 2:12:23 PM	Delete
Deone Heap	11/22/2011 2:24:58 PM	Delete

A window will appear saying " *Are you sure you wish to delete this Material Charge?"* Click *OK* to continue or *Cancel* to return to the previous screen.



The grid will refresh and your deleted material transaction will no longer be displayed in the material charges.

5.4.3.1 Reserved Materials

Before moving on, notice that when you hover your mouse over the *Materials* tab at the top of the page, a sub-menu labeled ***Reserved Materials*** appears. Click here to checkout required or recommended materials for this work order.

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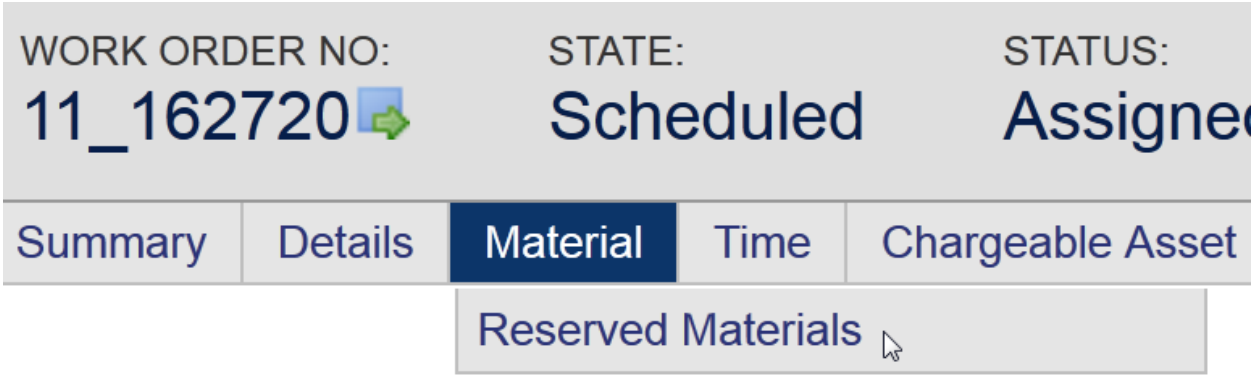

This will show any recommended or required items for this work.

Reserved Material:

Product ID	Quantity	Storeroom	
030199	2	AT102	Issue Reserved Item

Recommended Material:

Product ID	Quantity	Storeroom	
262117	1	TB103	Issue Recommended Item

To issue any of the recommended or required items, click the link at the right of the grid.

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Reserved Material:

Product ID	Quantity	Storeroom	
030199	2	AT102	Issue Reserved Item

This will automatically populate the grid in the *Material Charges* section at the bottom of the page. This makes it simple to check out items based on the work requested.

At the bottom of the page, you have the same search criteria in the Material Charges section as the *Materials* tab. Here you can search for materials transactions specific to this work order.

Notice in the **Material Charges** section at the bottom of the page, the grid has been updated to include this transaction. This section will show all materials transactions throughout the life of this work order.

Material Charges

Product Like

Trans Date On or After mm/dd/yyyy hh:

Trans Date On or Before mm/dd/yyyy hh:mm am/pm

Issue To Like

Search

Product ID	Description	Comments	QTY	Storeroom	Unit Price	Total Price	Issue To
030199		Comments	1	AD035	$ 6.23	$ 6.23	Jake Stevens

You can use the search fields above the grid in the *Material Charges* section to search for and locate specific materials transactions. Simply use the desired field(s) to search for transaction. For example, let's say we want to search for all materials transactions to this work order made on or after *November 21, 2011*. Enter that date into the ***Trans Date On or After*** field and click the ***Search*** button at the bottom left of the section.

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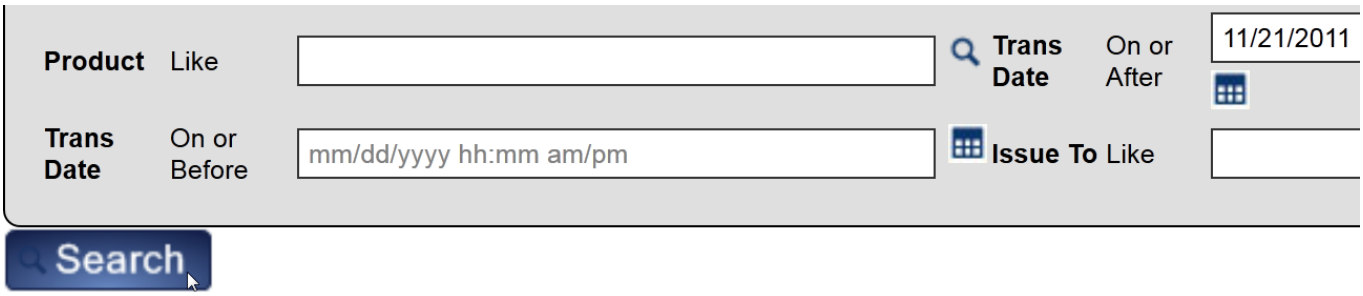

Now this will show all the materials transactions made on or after our specified date in the grid below the search criteria.

Product ID	Description	Comments	QTY	Storeroom	Unit Price	Total Price	Issue To
030199		Comments	1	AD035	$ 6.23	$ 6.23	Jake Stevens
NS-02096	Piping	Comments	1	NonStock	$ 14.59	$ 14.59	Garth Udy
030199		Comments	2	BB208C	$ 6.23	$ 12.46	Deone Heap

If you ever wish to delete a material posting, click the Delete link of the transaction you wish to remove.

Issue To	Transaction Date	Delete
Jake Stevens	11/22/2011 2:00:39 PM	Delete
Garth Udy	11/22/2011 2:12:23 PM	Delete
Deone Heap	11/22/2011 2:24:58 PM	Delete

A window will appear saying " *Are you sure you wish to delete this Material Charge?"* Click *OK* to continue or *Cancel* to return to the previous screen.

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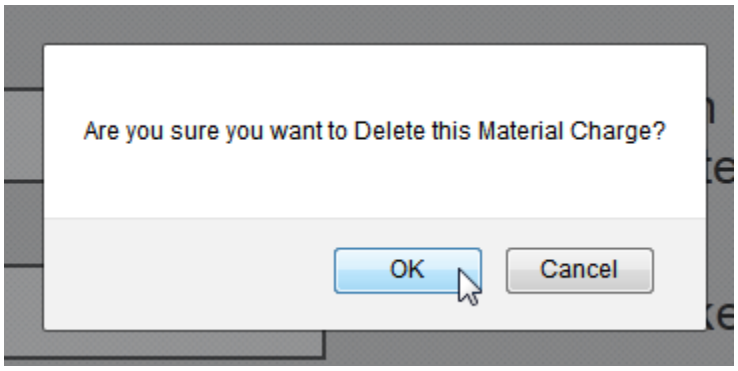
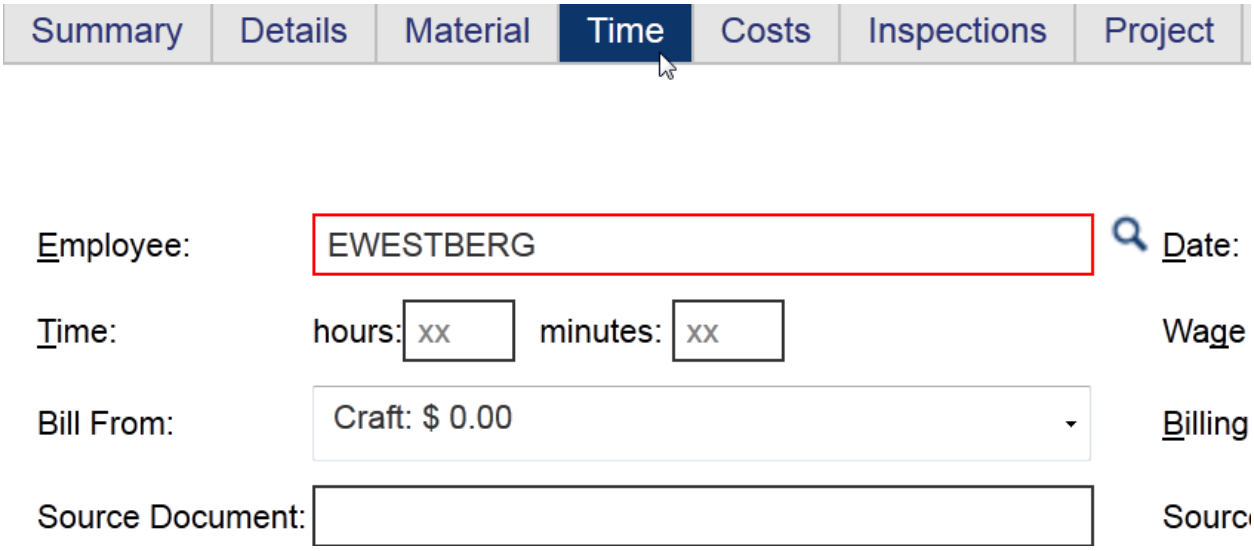


The grid will refresh and your deleted material transaction will no longer be displayed in the material charges.

5.4.4 Time Tab

Much like the *Materials* tab, the ***Time*** tab is meant to be able to document time transactions throughout the life of a work order.

Clicking the *Time* tab will display a form for employees to fill out to post time to a work order.



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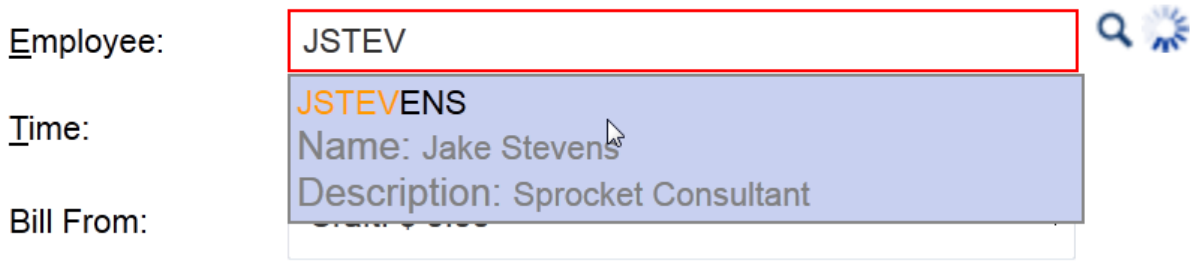
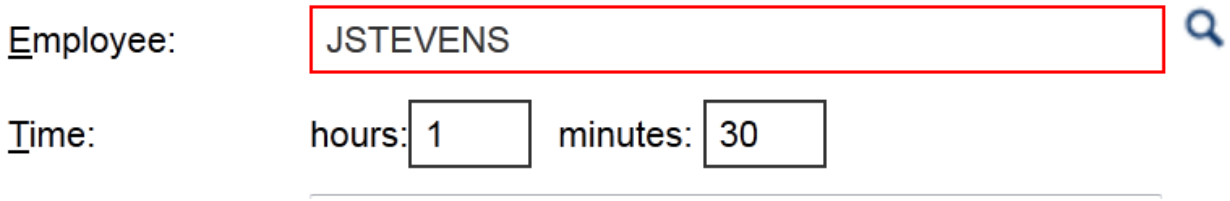
Notice that the value in the ***Employee*** field will automatically populate with the employee who is assigned to this work order. If you wish to post time for a different employee, simply clear the name out of the field and use the *Auto Lookup Tool* to locate and select the desired employee name.

Remember that fields outlined in red are required fields.



Once you have selected the desired employee, enter in the hours and minutes you wish to post in the ***Time*** field below.



Fill in the other fields as necessary with the appropriate information. Once you have entered in all of your information, you may leave comments about this time posting in the *Remarks* box below.

Click ***Save Time*** at the bottom of the form when you wish to submit your time posting.

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Bill From: Division: $ 0.00

Source Document:

Remarks: This will require overtime.

Save Time

Notice in the ***Time Charges*** section at the bottom of the page, the grid has been updated to include this transaction. This section will show all time transactions throughout the life of this work order.

Search

TransactionDate	Employee	Comments	WageCode	Hours	MultipliedWageRate	Total Wage	BillingCode
11/22/2011 12:00:00 AM	JSTEVENS	Comments	Regular	1h : 30m	$ 0.00	$0.00	Standard
				sum: 1h : 30m		**sum: $0.00**	

You can use the search fields above the grid in the *Time Charges* section to search for and locate specific time transactions. Simply use the desired field(s) to search for a transaction. For example, let's say we want to search for all time transactions to this work order made on or after *November 21, 2011*. Enter that date into the ***Trans Date On or After*** field and click the ***Search*** button at the bottom left of the section.

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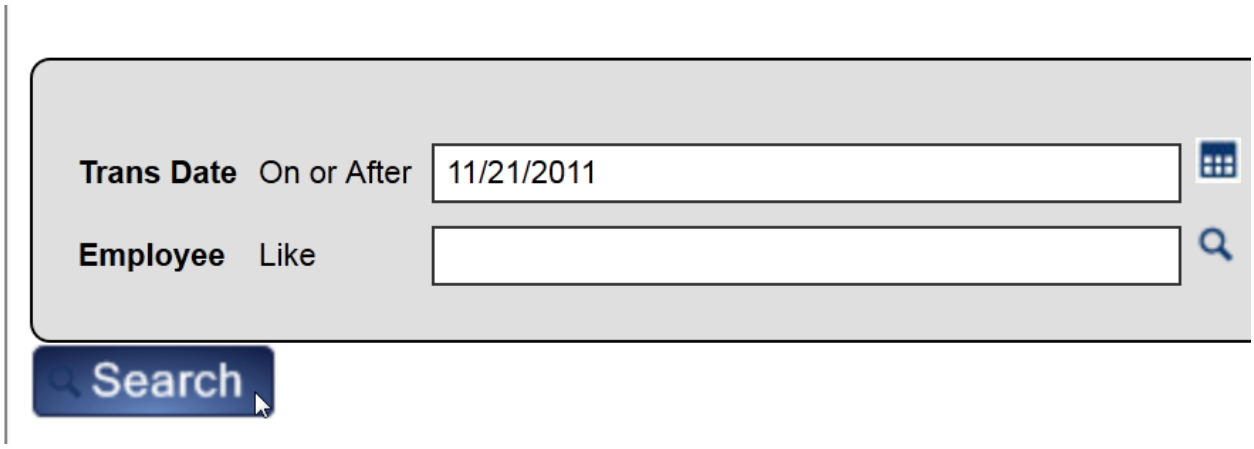

Now this will show all the time transactions made on or after our specified date in the grid below the search criteria.

If you ever wish to delete a time posting, simply scroll to the far right of the grid and click the ***Delete*** link for the time transaction you wish to delete.

BillingCode	MultiplieBillingRate	Total Billing	SourceDoc	SourceDocDate	Delete
Standard	$ 0.00	$0.00			Delete
Standard	$ 0.00	$0.00			Delete

A window will appear saying " *Are you sure you wish to delete this Time posting?"* Click *OK* to continue or *Cancel* to return to the previous screen.

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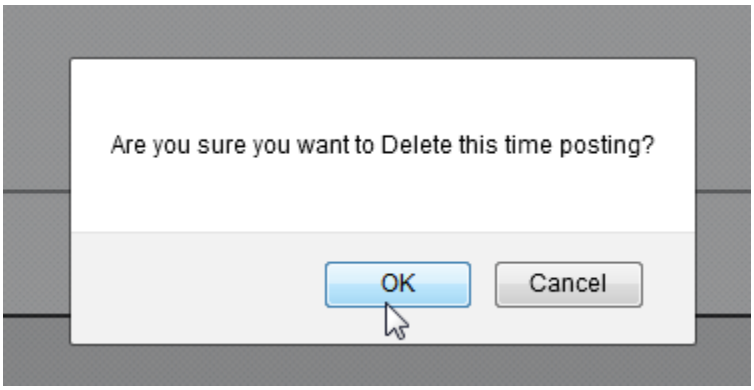

The grid will refresh and your deleted time transaction will no longer be displayed in the time charges.

5.4.5 Costs Tab

The *Costs* tab is used by managers to estimate labor and materials charges and compare them to actual costs.

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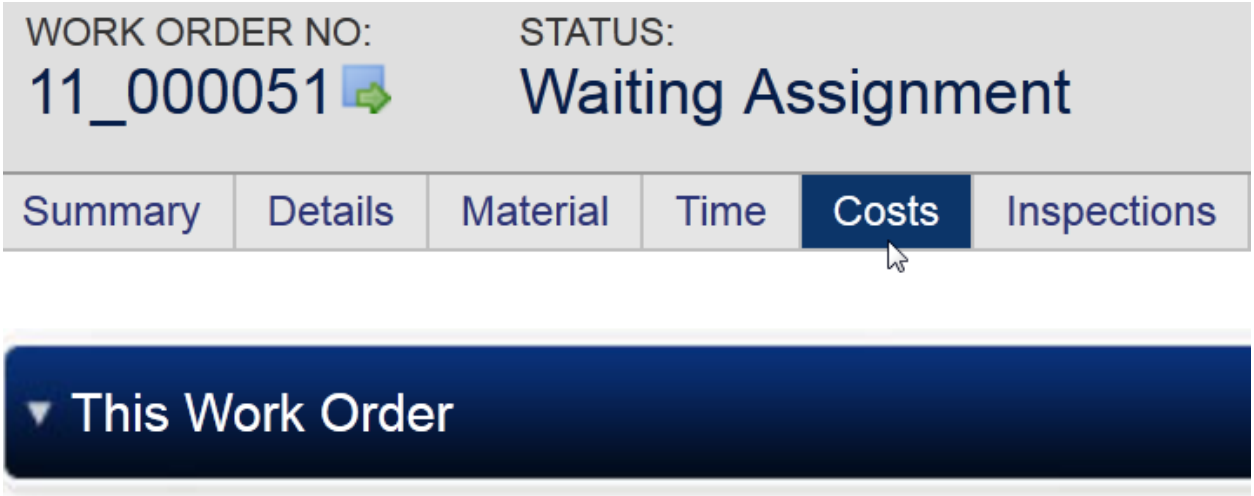
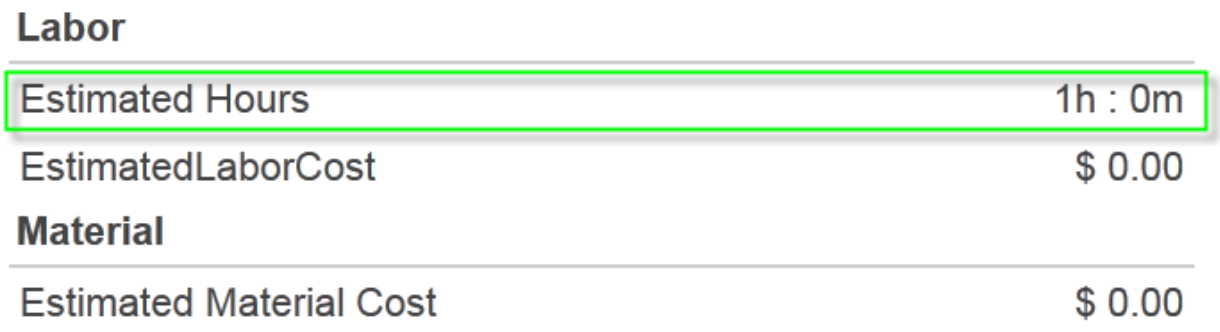


Note: Sprocket is customized based on customer needs. Your screen may or may not display the above information. This will be primarily used by managers. Contact your Sprocket Administrator with questions.

This tab is separated into two sections: *This Work Order* and *Additional Totals*. Notice that you are first directed to the *This Work Order* section of the tab. The left hand column displays estimated time and materials for the type of work in this work order.



The right hand column will display actual labor and material costs of this work order. So, as technicians enter time postings and issue materials, it will all be calculated and tracked in the Costs tab and dynamically change according to changes in time and materials for this work order.

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Labor	
Actual Hours	8h : 30m
Actual Labor Cost	$ 0.00
Actual Labor Price	$ 0.00
Material	

You can click the *Additional Totals* tab below the *This Work Order* tab to view additional costs and details such as sub totals and estimate costs for this work order. The left hand column will include costs for estimates for this work order.

Detailed Estimates	
Sub Totals	
Detailed Estimate Sub Total Cost	$ 0.00
Detailed Estimate Sub Total Price	$ 0.00
Totals	
Detailed Estimate Total Cost	$ 0.00
Detailed Estimate Total Price	$ 0.00

The right hand column in this section will display grand totals that incorporate all costs for labor, materials, and estimates for this work order.

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Grand Totals

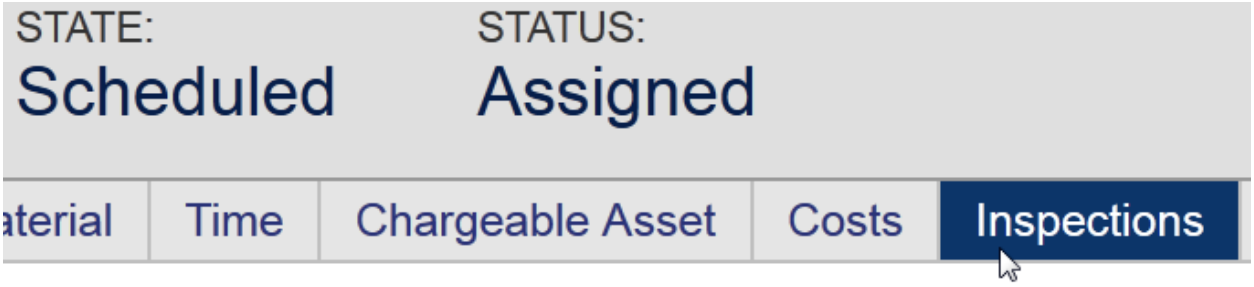
This Work Order

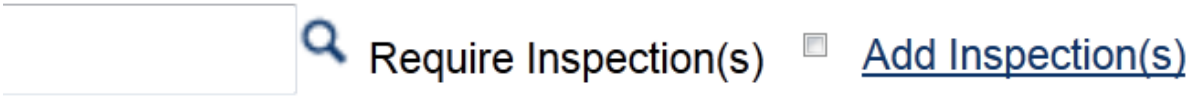
Total Cost For Work Order	$ 0.00
Grand Total Price For Work Order	$ 0.00

Note: Sprocket is customized based on customer needs. Your screen may or may not display the above user information. Contact your Sprocket Administrator with questions.

5.4.6 Inspections Tab

The *Inspections* tab is used to display or add inspections for this particular work order.





5.4.6.1 Conducting an Inspection from Work Order Details

Notice that when you click the tab, any inspections that are attached to this work order will appear in a grid at the bottom of the screen.

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Name	Description
Weekly Grounds Inspection	Weekly Grounds Inspection

Notice that the box is checked in the *Required* column of the grid indicating that it is required that this inspection be completed before the work order can be closed complete.

	Required	Print	Remove
	☑	Print	Remove

There are two ways you can run this inspection:

- You may click the *Print* link at the far right of the grid to use a hard copy
- You may click the *Inspection Name* to directed to the inspection to run it

Clicking the *Inspection Name* will automatically load the inspection form for you to complete.

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Weekly Grounds Inspection		
1.)	Inspector: *	
2.)	Location: *	$S:Odatech.Business.'
3.)	Work Order Identifier: *	$S:Odatech.Business.'
4.)	Garbage Cans Emptied: *	Select an Option
5.)	Sidewalks Clear of Debris: *	Select an Option
6.)	Grass Mowed: *	Select an Option
7.)	Sprinklers Functioning: *	Select an Option
8.)	Comments: *	

Note: Sprocket is customized based on customer needs. Your inspection may or may not display the above fields and/or answer options. Contact your Sprocket Administrator with questions.

You may begin filling in the appropriate information into the inspection form. To enter information, click inside the text field to begin typing or select an option from a drop down menu. Please note that any field with a red asterisk next to it is a required field so you must provide an answer.

So, in the *Inspector* field, enter in your name because you are the person performing this inspection.

Weekly Grounds Inspection		
1.)	Inspector: *	Rashard Mendenhall

Notice that the *Location* and *Work Order Identifier* fields are filled in with lettering. This string of data indicates that the person who created this inspection has added some actions that automatically fill in this information, so you can skip these questions as they will be automatically answered for you.

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Location: *	$S:Odatech.Business.
Work Order Identifier: *	$S:Odatech.Business.

Next, notice that the four questions on this inspection have drop down menus for answer options. As each item is inspected tap or select the *Select an Option* drop down menu to answer each question:

- Yes
- No
- NA

Note: Sprocket is customized based on customer needs. Your inspection may or may not display the above answer options. Contact your Sprocket Administrator with questions.

Garbage Cans Emptied: *	Select an Option
Sidewalks Clear of Debris: *	Select an Option Yes No NA
Grass Mowed: *	
Sprinklers Functioning: *	

To answer a question, tap or select the *Select an Option* drop down menu next to each question. Locate and select the appropriate answer and continue to the next question.

Continue through the inspection until you have answered all of the questions with the appropriate answers.

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At the bottom of the inspection, notice that there is a text field labeled ***Comments***. Here you can leave any remarks about this inspection. Notice the red asterisk next to the field name indicating that this field is also required.

Once you have answered all of the inspection questions and left comments, click the ***Submit*** button submit your inspection results or click the *Cancel* button to return to the previous screen without completing the inspection.

4.)	Garbage Cans Emptied: *	Yes
5.)	Sidewalks Clear of Debris: *	Yes
6.)	Grass Mowed: *	No
7.)	Sprinklers Functioning: *	NA
8.)	Comments: *	I will mow grass this afternoon.

Submit Cancel

When you click the *Submit* button, you will be redirected to the *Inspections* tab in the *Work Order Details*. Notice that the inspection grid has been updated and the links at the far right of the grid now say ***Performed*** indicating that the inspection for this work order has been completed.

Required	Print	Remove
	Performed	Performed

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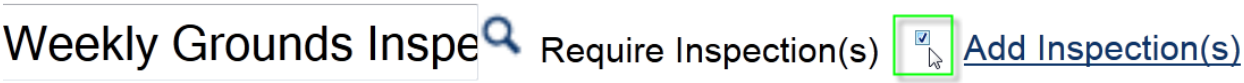
Now that the inspection has been completed, you are able to close out this work order with all the required work being completed and the inspection results being updated in Sprocket.

5.4.6.2 Adding an Inspection to a Work Order

You can also use the *Inspections* tab in the *Work Order Details* to add an inspection to a work order and make it required to complete the work. To do this, use the *Auto Lookup Tool* to locate and select the desired inspection from the ***Add Inspection*** field.

Once the desired record is returned, select it to add it to the work order.

Next, determine if you would like this inspection to be required. If so, check the ***Required*** checkbox. If you do not wish this inspection to be required, leave the *Required* checkbox unchecked. Let's say we would like to make this inspection required, so check the checkbox.



Once this is done, simply click the ***Add Inspection(s)*** link at the right of the screen.

Now notice that a grid appears at the bottom of the page displaying the inspection you just added to the work order.

Name	Description
Weekly Grounds Inspection	Weekly Grounds Inspection

Now you can either add another inspection or exit the page.

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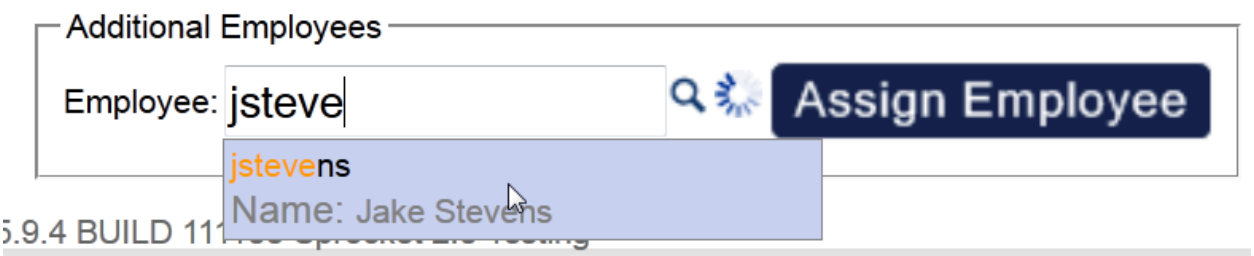
5.4.7 Project Tab

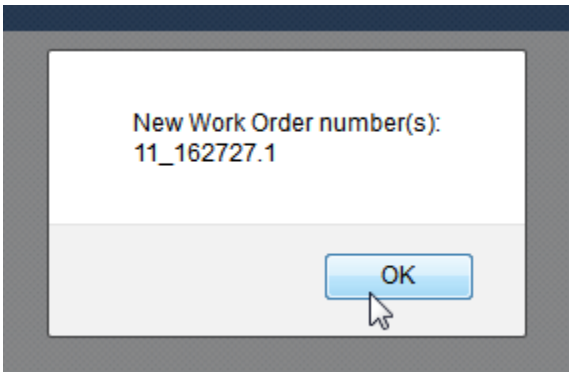
The next tab in the *Work Order Details* is the ***Project*** tab. The *Project* tab is used when a work order is assigned to an employee and the employee needs additional employees to help complete the task. You will use the Project tab to assign these employees to their own *Child Work Order* for them refer to for this work.

To assign an additional employee, use the *Auto Lookup Tool* on the ***Employee*** field to help locate and select the appropriate employee(s) to assign to this work order. Either click the *Auto Lookup Tool* icon to view a list of all possible employees or begin typing all or part of the name of the employee you with to assign in the *Employee* field.



Once the correct name is returned, select it and click the ***Assign Employee*** button to the right. A window will pop up giving you a new work order number. This will be the *Child Work Order Identifier*. Any work order that has a decimal in the Identifier is always a *Child Work Order*.

Click ***OK*** to continue.



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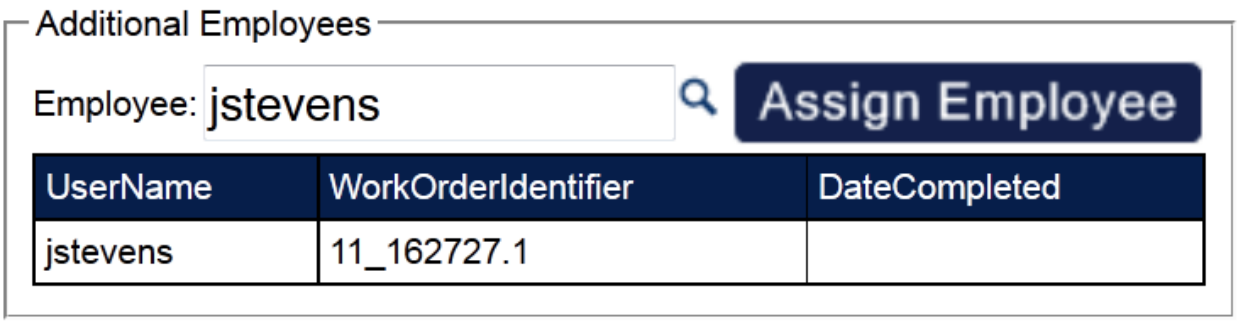
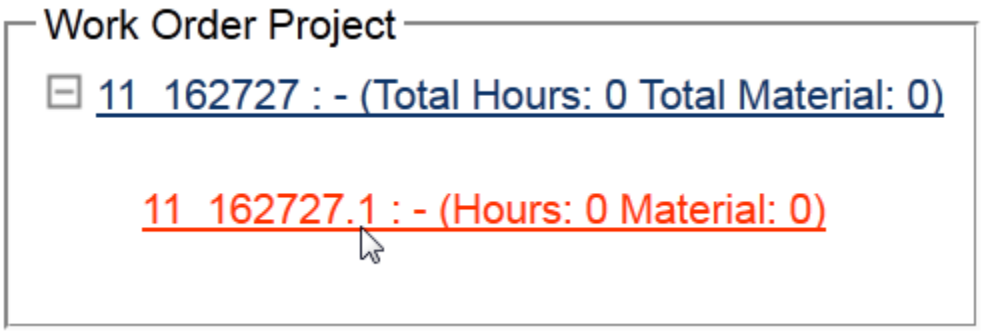
You will be returned to the *Project* tab screen. Notice that a grid is displayed with the name of the employee you just added to the work order and the *Child Work Order Identifier*.



To the left of the grid, a Project Tree is displayed. You can expand each "branch" of the tree to view the *Work Order Details* for each assigned employee by clicking the plus sign to the left of each branch.

Each branch will display the *Work Order Identifier* and the total time and materials posted to this work order to date. You can click the branch to view the full details of that particular work order.



A window will appear asking if you wish to view the details for this work order. Click ***OK*** to continue or click *Cancel* to stay on this page.

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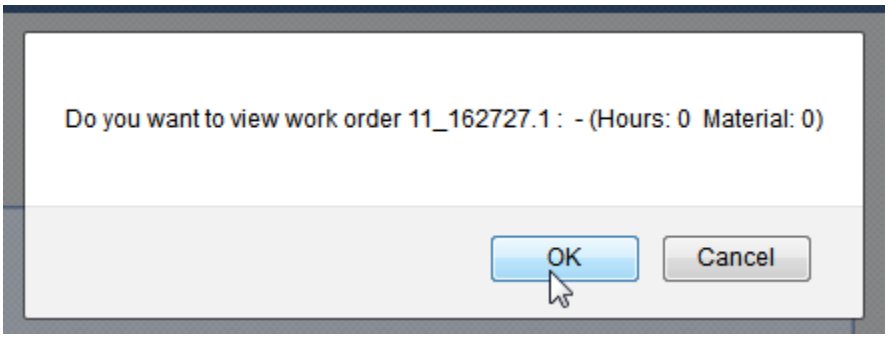
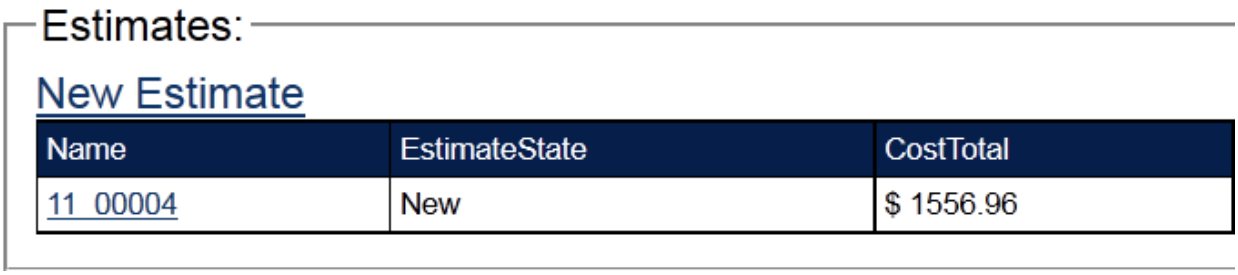


From here you may continue to assign employees to this work order or exit the page.

5.4.8 Estimates Tab

Use the ***Estimates*** tab to request approval of your estimate for this work order and view previous estimate submissions for this work order.

Notice that when you navigate to this screen, any previous estimate submissions are displayed in a grid on the screen.



Name	EstimateState	CostTotal
11_00004	New	$ 1556.96

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5.4.8.1 Creating New Estimate

Now that you have located the ***New Estimate*** screen and have identified the correct work order that this estimate is for, you may begin entering the appropriate information to submit your estimate request. Notice that fields that are outlined in red indicate that these are required fields. Notice that fields filled out in gray are *Read Only* fields that need not be filled out right now.

If you wish to create a new estimate for this work order, click the ***New Estimate*** link at the top of the grid.

Estimates:

New Estimate

Name	EstimateState	CostTotal	BillingTotal	DateSubmitted
11_00016	Approved	$ 15936.27	$ 15000.00	10/21/2011 7:51:00 AM

You will be directed to the ***Main*** tab of the ***New Estimate*** form to fill out and submit for approval. Remember that fields that are outlined in red indicate that these are required fields. Fields filled out in gray are *Read Only* fields that need not be filled out right now.

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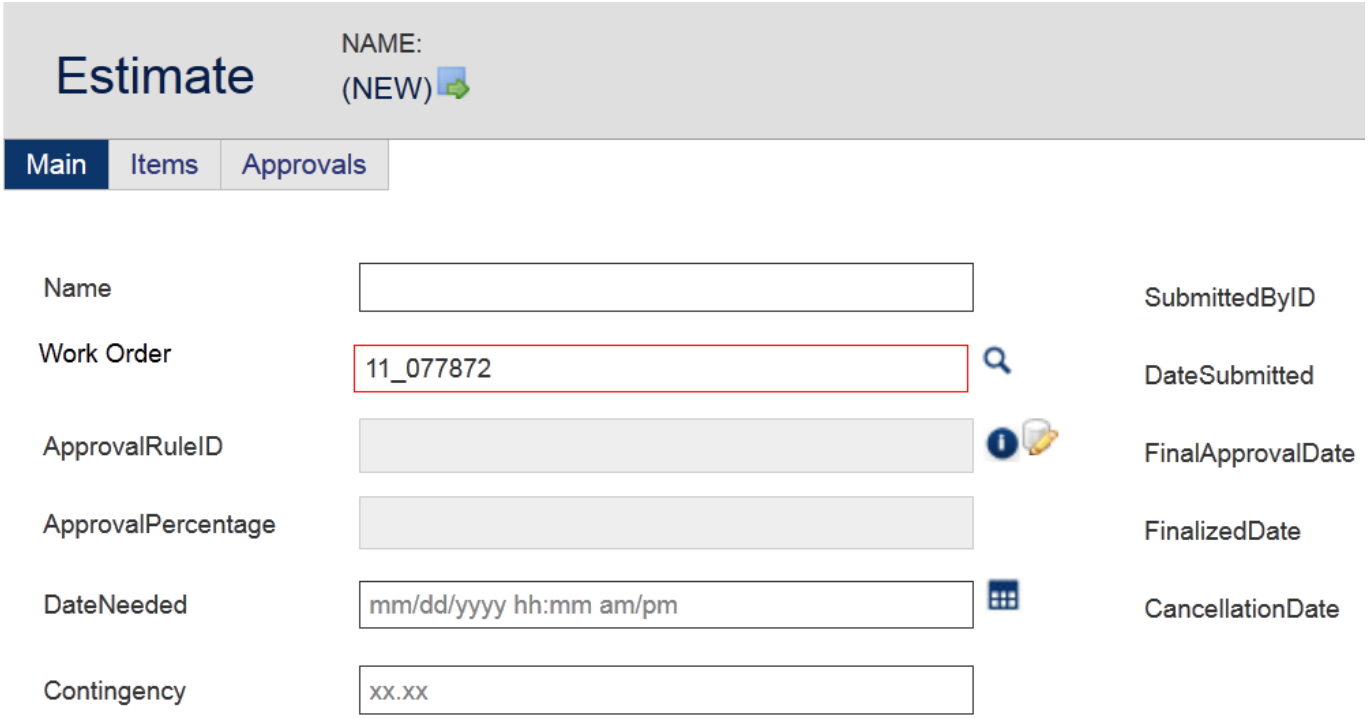

Note: Sprocket screens are customized based on customer needs. Your screen may or may not display the above fields. Contact your Sprocket Administrator with questions.

Begin filling out the details of the estimate you wish to submit for approval. Let's say we would like to submit an estimate for approval for an office renovation for $3,543.89.

So, in the **Name** field, enter in **Office Renovation**. Let's say we need this estimate to be approved by **October 21, 2011**, so enter this into the **Date** field. Let's assume that we plan for a 10% contingency amount that is always rounded up to the next nearest hundred. In the **Contingency** field, enter in **$356.11** (3,543.89 + 10% = 3,898.279 rounded up to 3,900 – 3,543.89 = 356.11).

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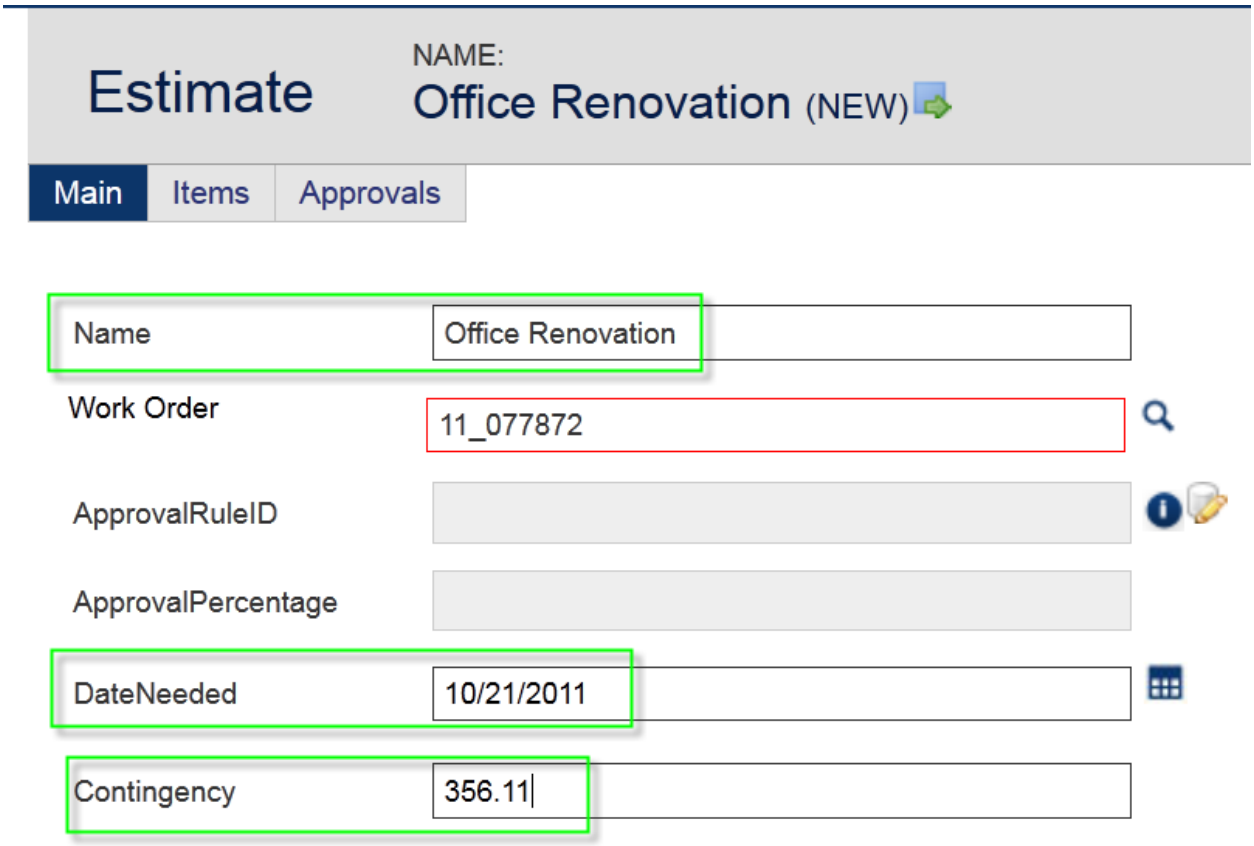
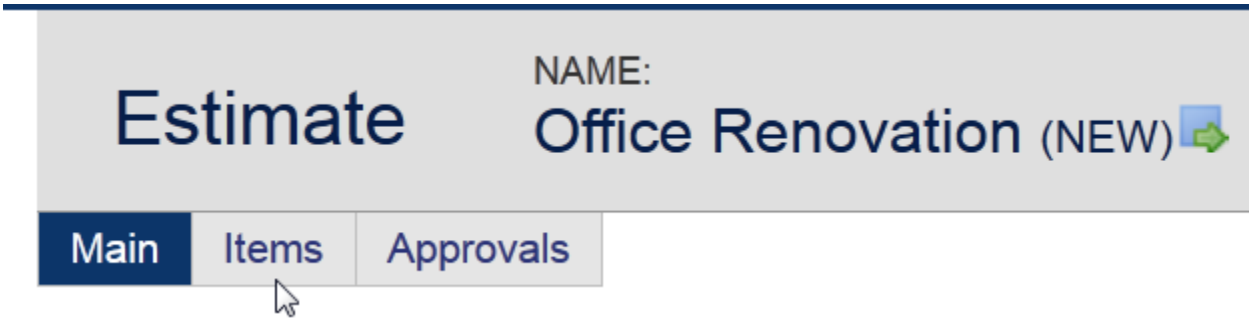


Now that you have added the preliminary information for this estimate, click the ***Items*** tab at the top of the form to add in ***Materials*** and ***Labor*** costs.



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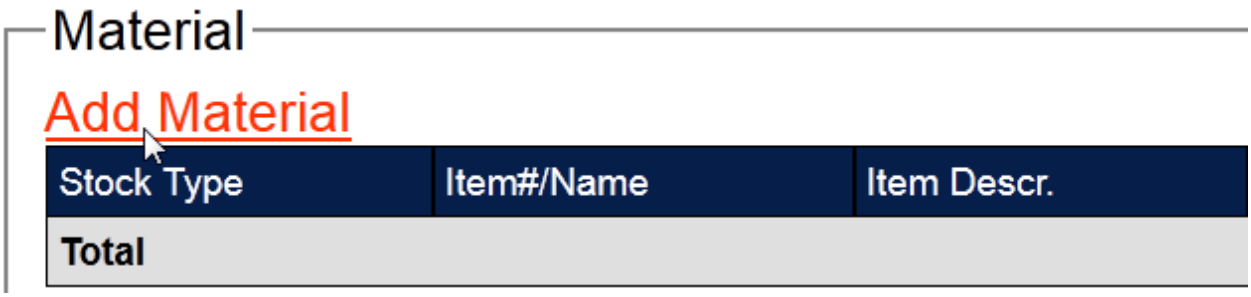
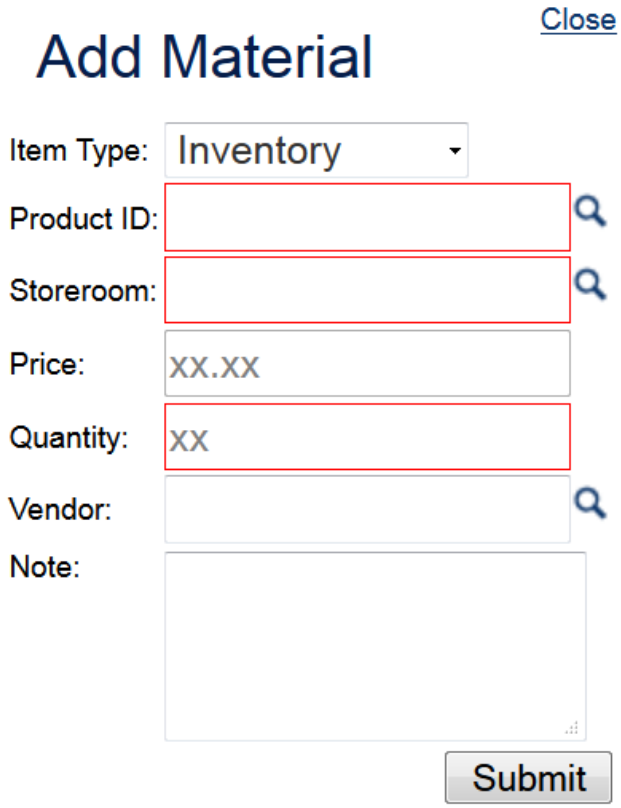
Notice at the top of the page that the current ***Estimate Totals*** for *Material* and *Labor* are all zero. Below these totals are *Material* and *Labor* grids that also display zero. To add materials to this estimate, select the ***Add Material*** link above the materials grid.



The ***Add Material*** window will pop up. Here you can fill out the specific information about the item you will be adding to this estimate.



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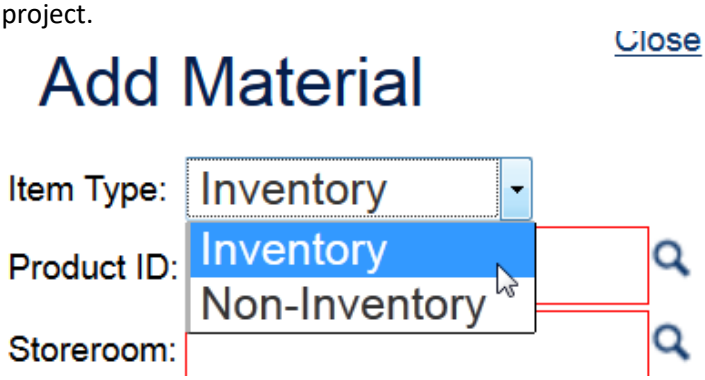
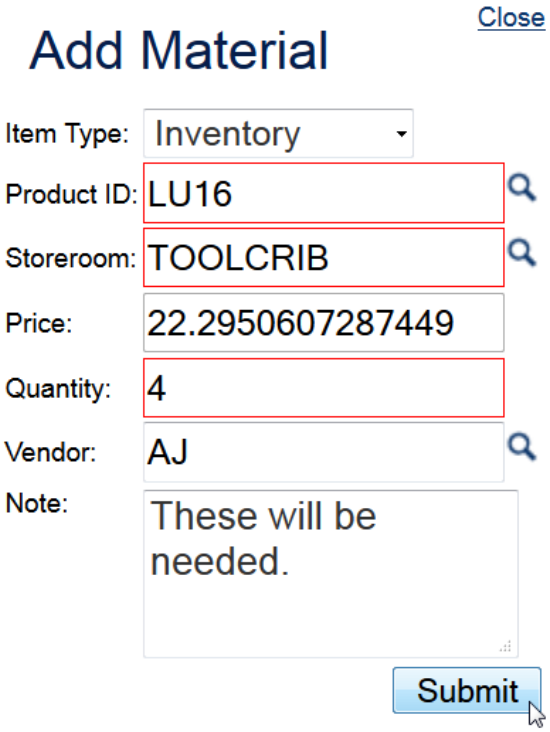
Notice that the ***Item Type*** field is a drop down menu where you can select an item from inventory or a non-stock item for this project.



Let's say we would like to add an item from inventory. Be sure that the word *Inventory* is displayed in the *Item Type* field. From here, fill out the fields as necessary to add the desired material.
Notice that some fields have the *Auto Lookup Tool* icon to the right of them. Click this icon to conduct a search for the desired material, or begin typing in all or part of the name and it will autocomplete your entry for you.

Once you have completed the form, review that your information is correct and click the ***Submit*** button at the bottom of the window.



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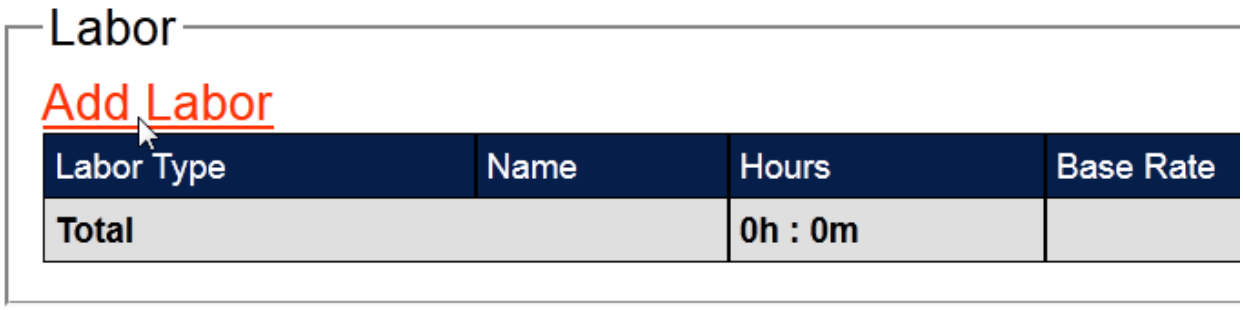
Notice that after selecting the *Submit* button at the bottom of the window, the *Material* grid is updated with new *Materials* totals. If you wish to add additional items, you may do so by clicking the *Add Material* link again.

Now we are going to add *Labor* hours to this estimate. To do this, click the ***Add Labor*** link above the *Labor* grid.



Notice that the ***Labor Type*** field is a drop down menu where you can select which labor classification you will be using for this project.

Let's say we would like to add an *Employee*. Use the drop down menu to locate and select ***Employee*** for the ***Labor Type***. From here, fill out the fields as necessary to add the desired employee. Notice that some fields have the ***Auto Lookup Tool*** icon to the right of them. Click this icon to conduct a search for the desired employee, or begin typing in all or part of the name and it will autocomplete your entry for you.

Next, enter the estimated amount of hours for this employee and select a *Wage Multiplier*.

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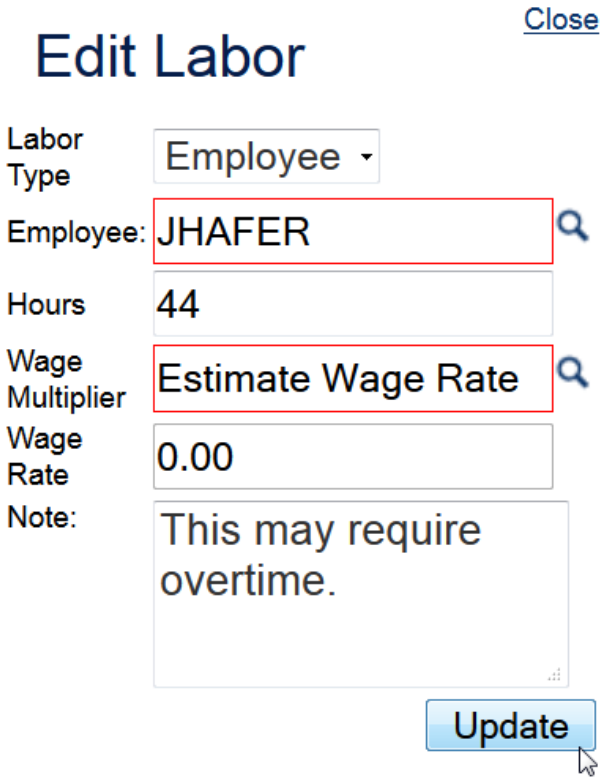
Once you have completed the form, review that your information is correct and click the ***Update*** button at the bottom of the window.



Note: Sprocket is customized based on customer needs. Your screen may or may not display the above fields. Contact your Sprocket Administrator with questions.

Notice that once the *Update* button is clicked, the *Labor* grid is updated with the new labor totals. You may add additional labor to this estimate by clicking the *Add Labor* button again.

Also notice that the *Estimate Totals* grid is also updated with new labor and materials totals.
When the desired items are added to this project estimate, click the ***Save*** button at the top right of the screen.

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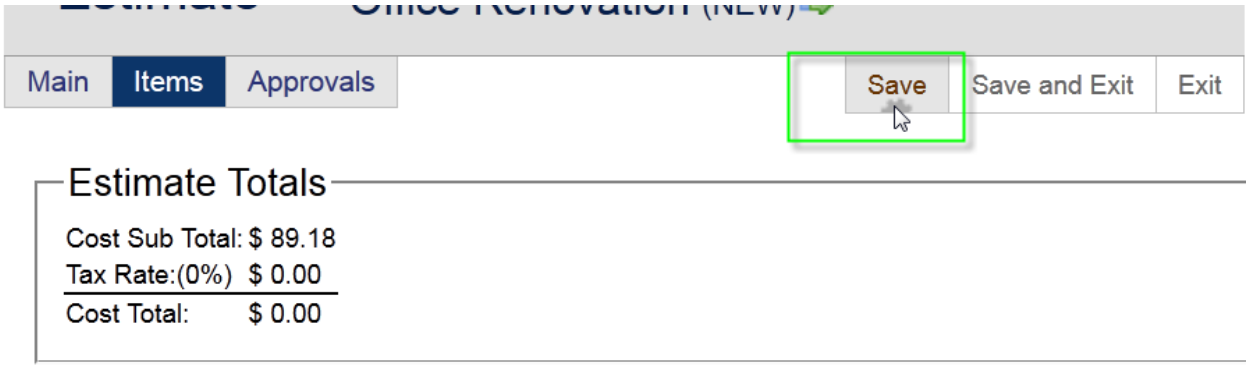

Once the record is saved, you will be directed back to the ***Main*** tab. Before submitting this estimate for approval, if you wish to add any additional information such as *Contact* information or *Attach Files*, click the ***Other Details*** tab at the top of the screen.

Here you can click the ***Add Contact***, ***Add Note***, and ***Attach File*** links to add addition details to this estimate.

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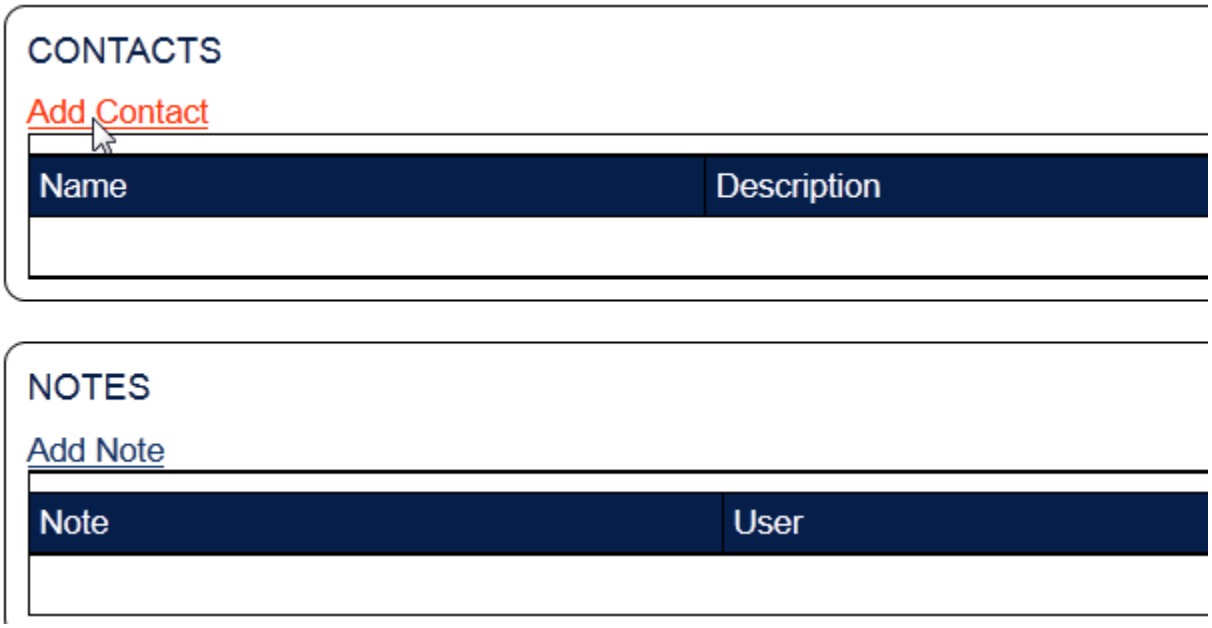

For example, if you wish to add contact information for the estimate requestor, click the ***Add Contact*** link.

A form will appear for you to fill out the information. When you complete the form, click the ***Save*** button at the bottom to update this tab with contact information.

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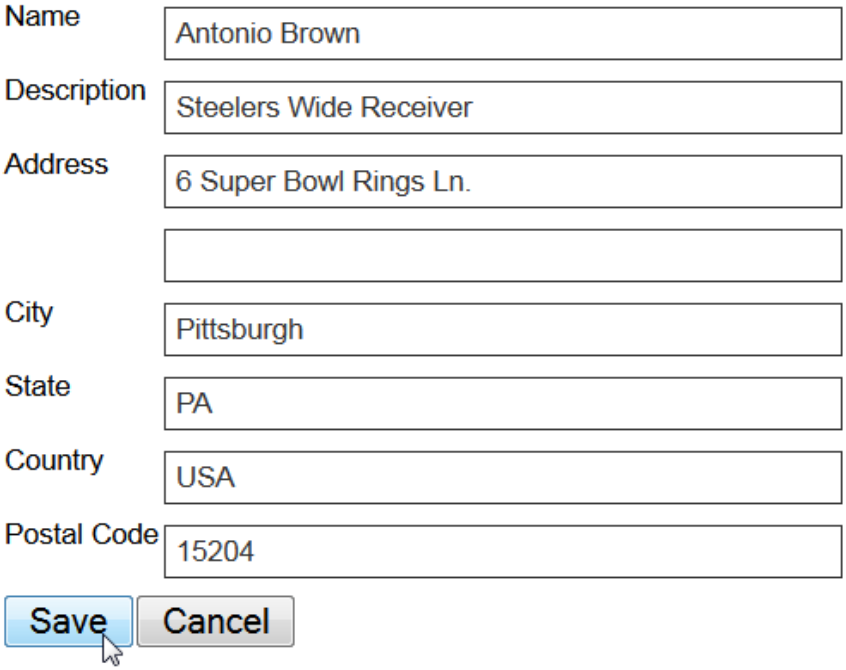
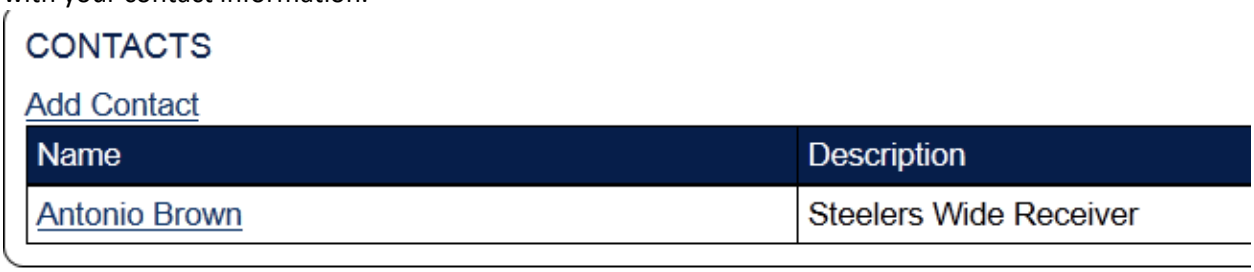
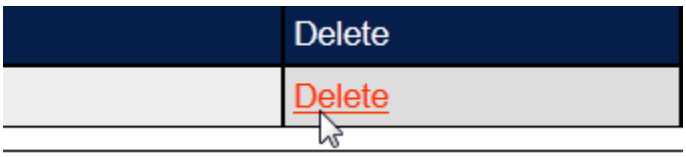


A window will appear saying *Success*. Click ***OK*** to continue. Now the *Other Details* tab will be updated with your contact information.



You can always delete this information by clicking the ***Delete*** link at the far right of the grid.



On the *Main* tab, once you have entered and reviewed all of information for this project estimate, click the ***Submit for Approval*** button to submit this for approval.

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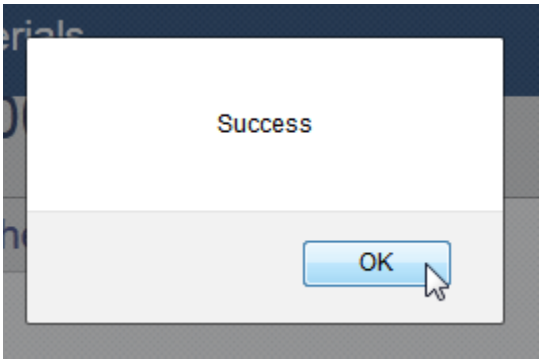
A window will appear saying ***Success***. Click ***OK*** to continue.



This will direct you to the *Estimates* tab in work order details. Now the *Estimates* grid will be updated to include the information you added.

5.4.8.2 Estimate Request Email Notifications

Now the *Estimate* is in a *Waiting for Approval* status. You will receive an initial email as confirmation of that the estimate was submitted for approval. There will be a link at the top of the email document that says ***Click here for work order details***. Use this link to view details of this estimate.

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Message | Estimate Waiting for Approvals.pdf (24 KB)

Click here for work order details

COST ESTIMATE

Auxiliary Maintenance Department

Click here for work order details

TEST ESTIMATE, PLEASE DISREGARD. Work Order

Description: Captial Needs Project

Note: This is an estimate only, you will be billed the actual costs. Any variance from the scope as listed will alter the cost. All scope changes will require approval.

Estimate Number: 11_0(

Estimate State/Status: **Waiti**

Work Order Number: 11_0

Building: BYU

Estimator: ppalm

Date Prepared: 10/21

LINE NO.	TYPE	ITEM DESCRIPTION	UNIT OF MEASURE	UNIT PRICE
1	Material	LU16 - Plywood, Oak 1/4	EA	$ 22.30
2	Employee	Hafer, Jesse - This may require overtime.	Hour	$ 0.00

As your request goes through the approval process, you will be notified by email of the status progression of this estimate.

5.4.8.3 Estimate Request for Modifications

While your *Estimate Request* is going through the approval process, an approver may request that certain changes or modifications be made to the estimate before approval. If this happens, you will receive another email with the subject line ***Estimate Modifications Requested***. There will be a link at the top of the screen saying ***Click here for work order details***. Click this link to view the requested modifications.

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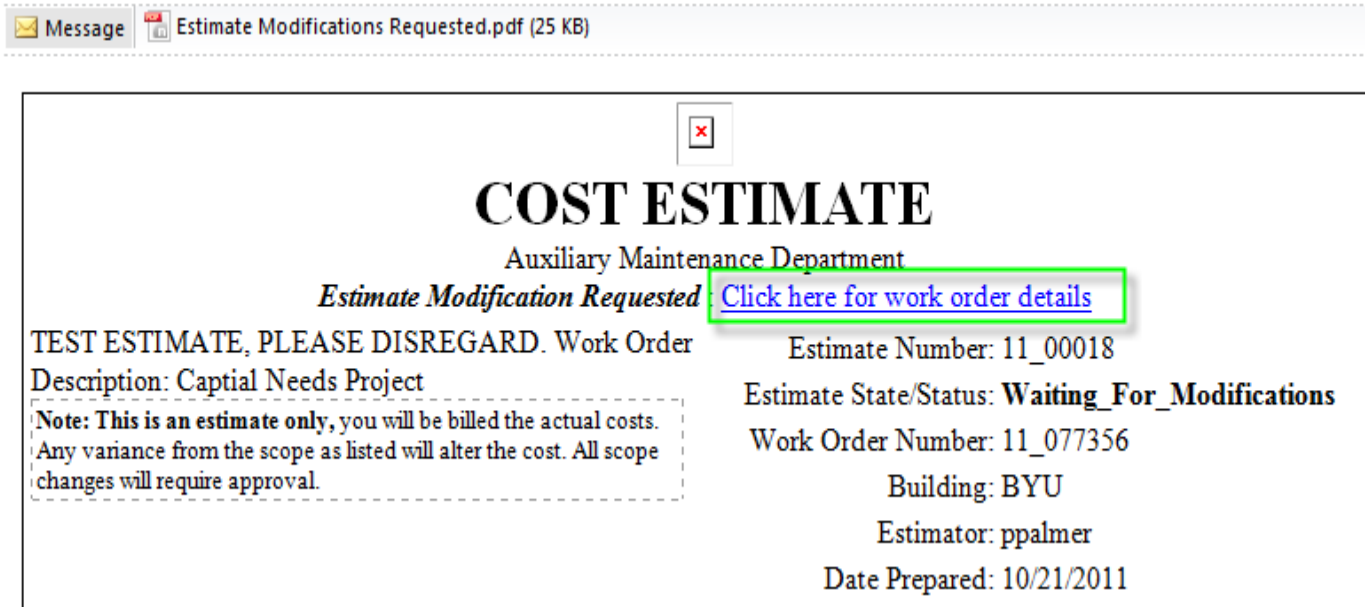
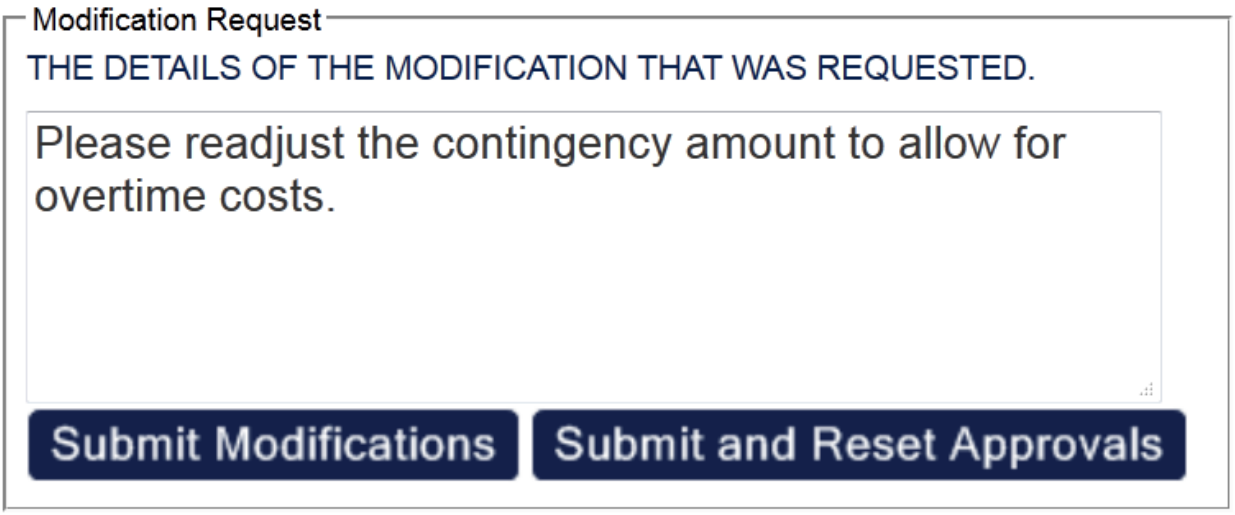


Once in the *Work Order Details*, you can edit, add, remove, or modify the desired aspects of this estimate. Notice that at the bottom of the *Estimate Details* screen on the *Main* tab, a new grid has been added that displays the *Modification Request* and two buttons that say ***Submit Modifications*** and ***Submit and Reset Approvals***.



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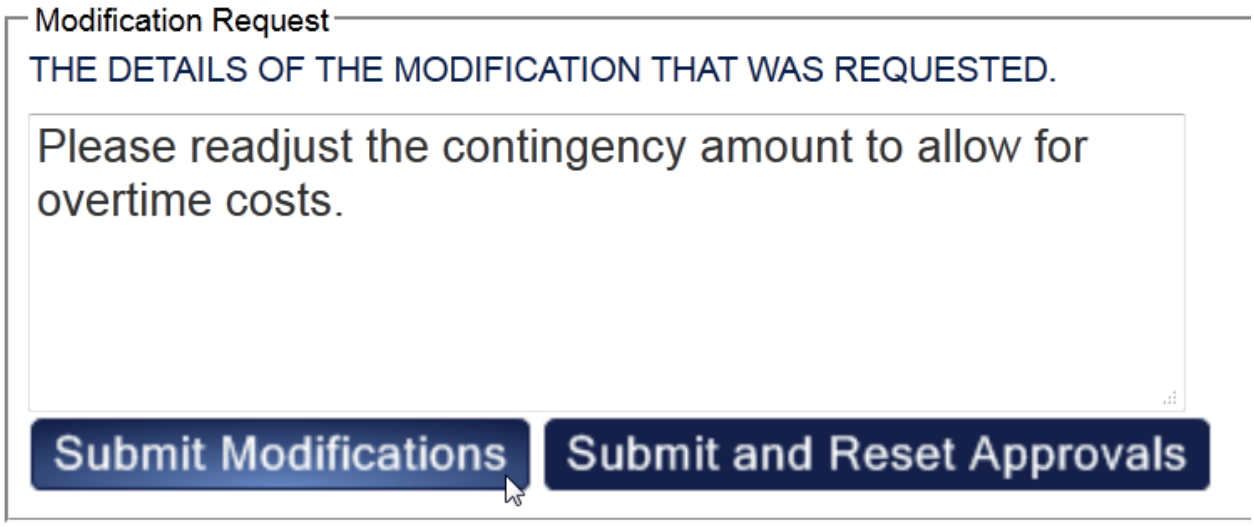
Once the modifications have been made and this estimate is ready to be resubmitted again, you will click one of these two buttons to resubmit.

Submit and Reset Approvals will submit the estimate again and the approval process will begin from the beginning with the first approver.

Submit Modifications will submit the estimate again beginning with the approver who requested the modifications. So, if an approval process requires 5 supervisors to approve this estimate and it was the third supervisor who requested the modifications the last time, this estimate will immediately be sent to that supervisor for review of modifications and approval.

Let's continue where this left off and click the ***Submit Modifications*** button.



A window will pop up saying *Are you sure you wish to submit your changes and notify the other users?*

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Click ***OK*** to continue or *Cancel* to return to the previous screen.

Now the email notifications will be issued to you and the approvers and the process will start from where it left off in the *Waiting for Approvals* status.

Now that your estimate has been submitted, you will receive email notifications that allow you to know if your estimate is approved or denied.

5.4.9 History Tab

The next tab in the *Work Order Details* is the ***History*** tab. Sprocket documents all actions performed to a work order or record in the system. You can use the *History* tab to view actions and changes that have occurred throughout the life of a work order.

This will display a tree that separates each action that has occurred in this work order. You can expand each "branch" to view individual events of this work order by selecting the plus sign in each row.

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Expander	User	ChangeDate
⊟	Erica Schatte	11/23/2011 11:53:00 A

ChangeUser	ColumnName	Old Value	New Value
Erica Schatte	WorkOrderStateID	New	Scheduled
Erica Schatte	WorkOrderStatusID	New	Waiting Assignment

In the example above, you can see that the work order was changed to a *Status* of *Scheduled*. In the *Change User* column, you can see that *Erica Schatte* is the user who changed the *Status* of the work order.

The *History* tab keeps track of every action in a work order so that accountability for work order dispatching is achieved.

5.4.10 Saved Files Tab

Sprocket allows you to attach files to any work order. A typical example of an attached file would be a picture of the problem or a user manual for a certain piece of equipment.

Notice the row of tabs at the top of the *Work Order Details* screen. At the far right of these tabs, click the ***Saved Files*** tab.

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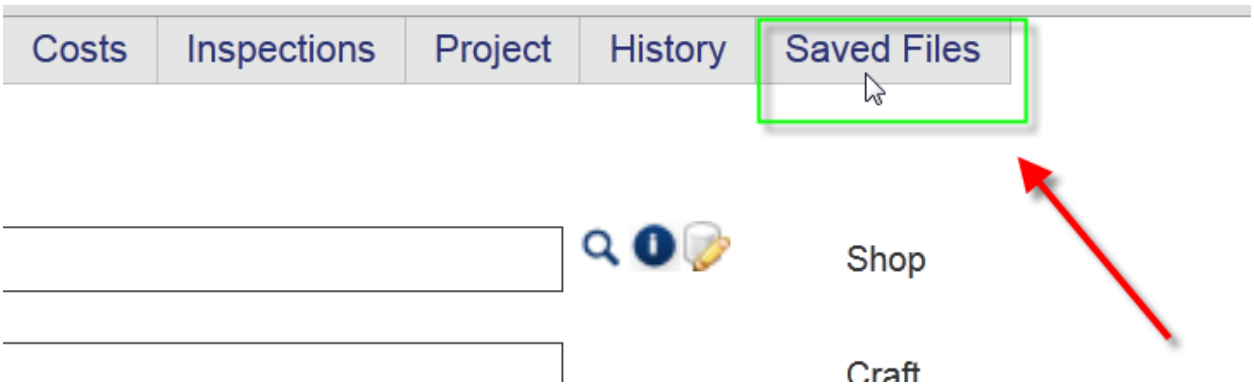
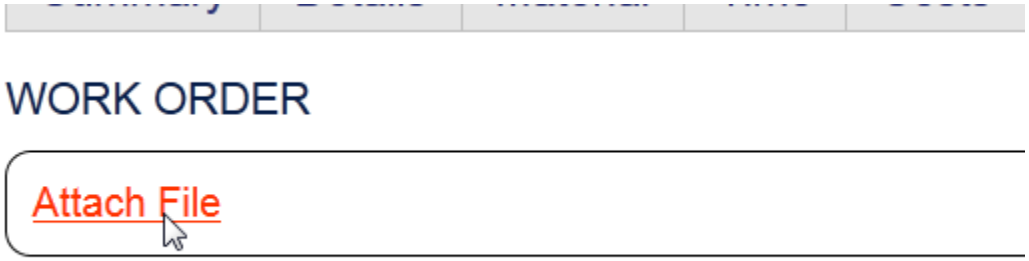


To attach a file to this work order, click the ***Attach File*** link.



A window will appear. Click the ***Browse*** button to search your computer for the file you would like to attach to the work order.

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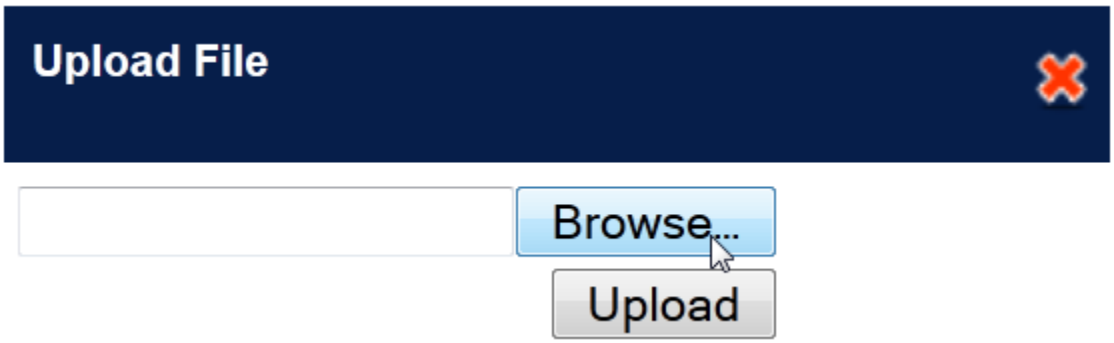
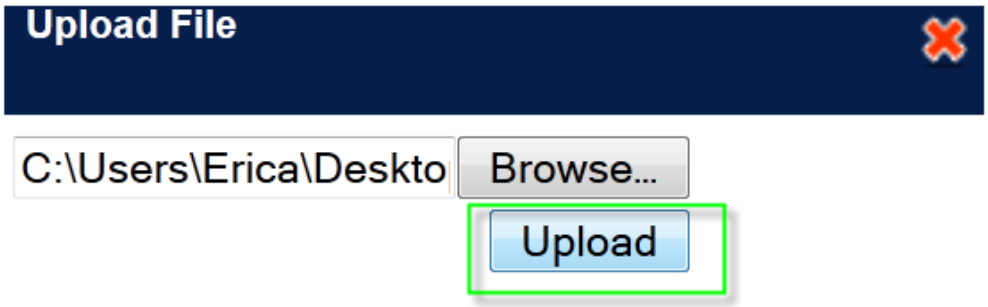
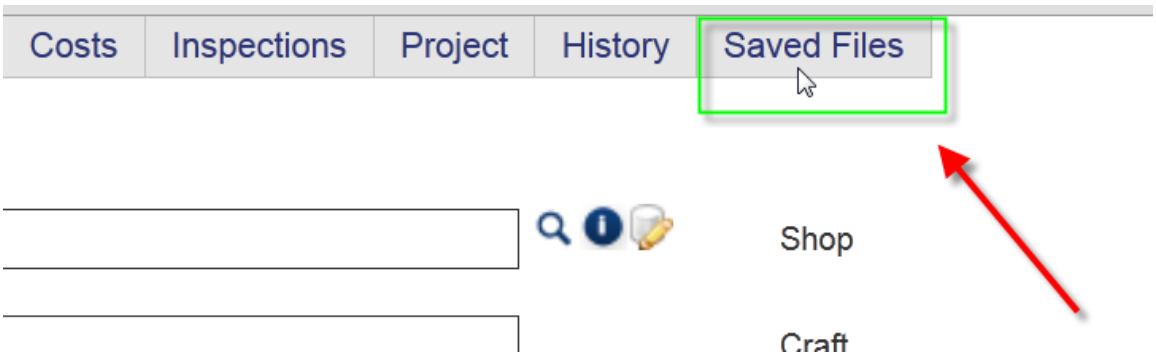


Once you locate and select the file, click the ***Upload*** button to attach it to the work order.



Now the file name and a paperclip icon will be displayed under the *Saved Files* tab.

If you wish to view the *Saved File* attached to this work order, click the *Saved Files* tab from work order details.



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Once here, click the *File Name* link and the file will open in the appropriate program. If you wish to add additional files, simply click the *Attach File* link again to add more files to this work order.

As always, when finished viewing, click the *Save* button at the upper right of the screen to ensure any changes you have made will be applied to the work order.

6.0 Inspections Console

6.1 Inspection Manager

As you learned in the *Work Order Details* section, there will be times when it is necessary for you to perform an inspection. If you need to run an inspection but it is not attached to a work order, you can locate and conduct the inspection using the ***Inspection Manager*** within ***Inspections Console***. To do this, navigate ***Inspections→Inspection Manager***.

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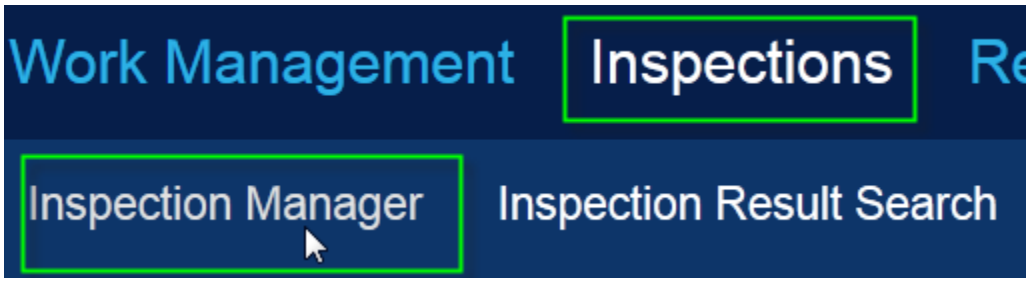
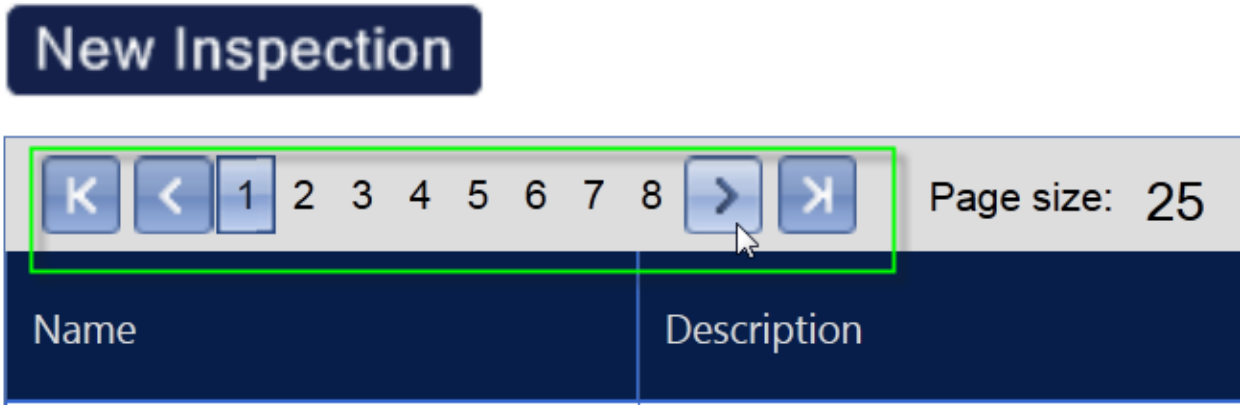


The *Inspection Manager* will display a list of all possible inspections in Sprocket. There are a couple of different ways you can locate your inspection:

- You can use the page number arrows at the top of the grid to scroll through each page of inspections and select the correct one



- You can use the Sprocket Search Criteria feature in the upper left hand corner of the page.

To search for your inspection, click the ***Search*** button in the upper left hand corner of the page.

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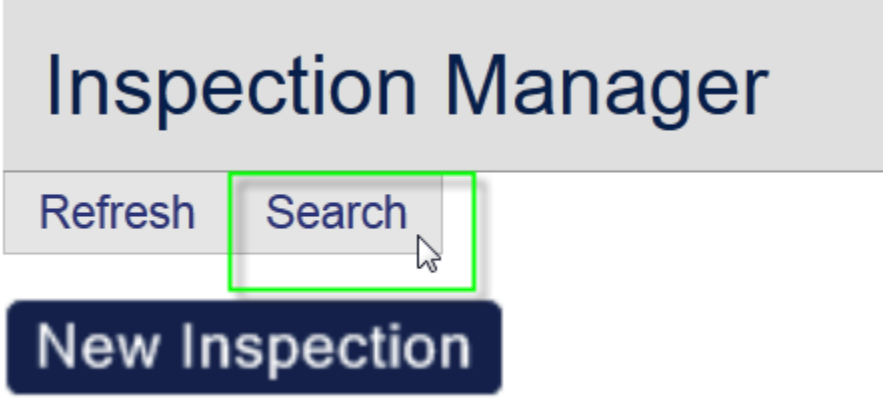
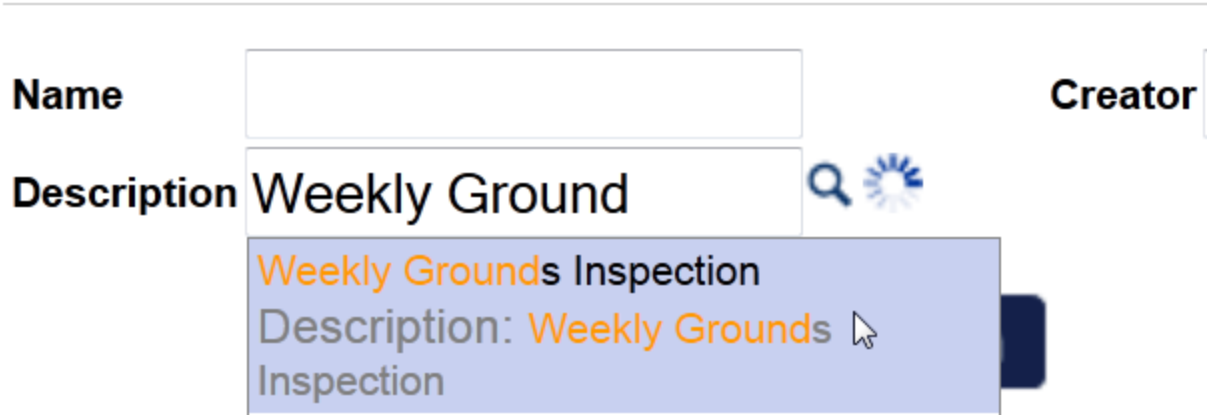


A window labeled ***Search Criteria*** will appear. Here you can enter in particular information you wish to filter for you search. Let's say we are searching for an inspection called *Weekly Grounds Inspection*. In the ***Description*** field, enter in all or part of the name ***Weekly Grounds Inspection***. Remember, the Auto Lookup Tool will help locate the correct record.



Once the correct record is returned, select it and click ***Search***.

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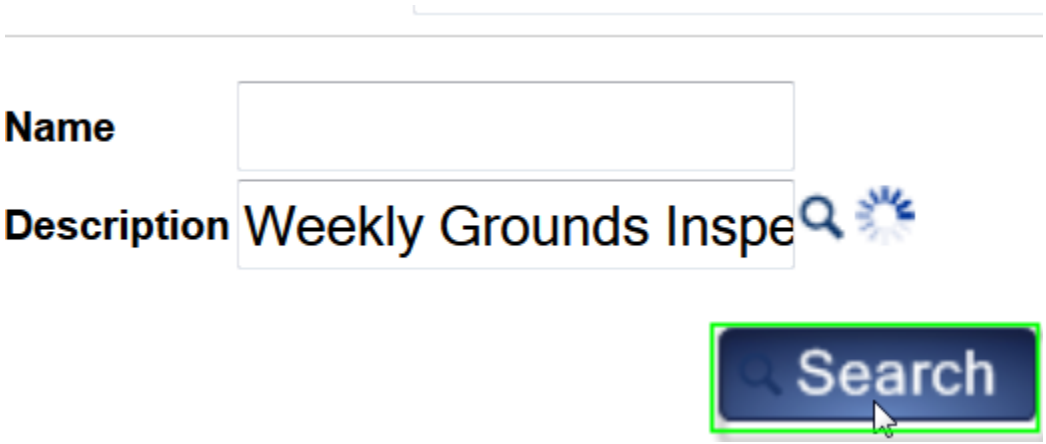
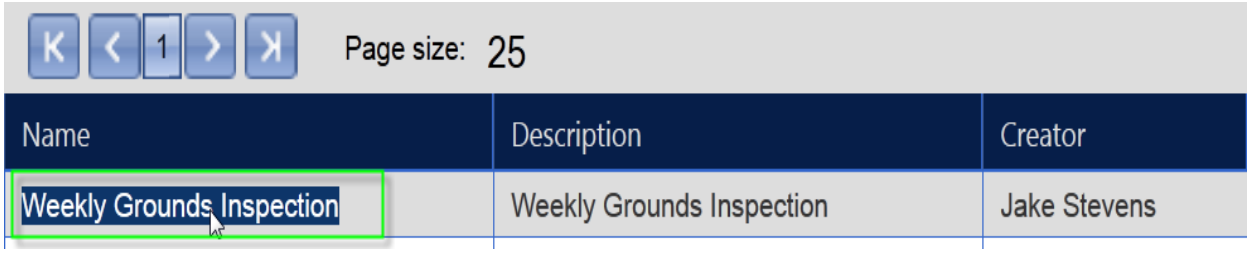


Note: Sprocket is customized based on customer needs. Your screen may or may not display the above search fields. Contact your Sprocket Administrator with questions.

Now the correct results will be displayed. Select the name of your inspection to run and complete it.



Clicking the *Inspection Name* will automatically load the inspection form for you to complete.

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Weekly Grounds Inspection		
1.)	Inspector: *	
2.)	Location: *	$S:Odatech.Business.'
3.)	Work Order Identifier: *	$S:Odatech.Business.'
4.)	Garbage Cans Emptied: *	Select an Option
5.)	Sidewalks Clear of Debris: *	Select an Option
6.)	Grass Mowed: *	Select an Option
7.)	Sprinklers Functioning: *	Select an Option
8.)	Comments: *	

Note: Sprocket is customized based on customer needs. Your inspection may or may not display the above fields and/or answer options. Contact your Sprocket Administrator with questions.

You may begin filling in the appropriate information into the inspection form. To enter information, click inside the text field to begin typing or select an option from a drop down menu. Please note that any field with a red asterisk next to it is a required field so you must provide an answer.

So, in the *Inspector* field, enter in your name because you are the person performing this inspection.

Weekly Grounds Inspection		
1.)	Inspector: *	Rashard Mendenhall

Notice that the *Location* and *Work Order Identifier* fields are filled in with lettering. This string of data indicates that the person who created this inspection has added some actions that automatically fill in this information, so you can skip these questions as they will be automatically answered for you.

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Location: *	$S:Odatech.Business.
Work Order Identifier: *	$S:Odatech.Business.

Next, notice that the four questions on this inspection have drop down menus for answer options. As each item is inspected tap or select the *Select an Option* drop down menu to answer each question:

- Yes
- No
- NA

Note: Sprocket is customized based on customer needs. Your inspection may or may not display the above answer options. Contact your Sprocket Administrator with questions.

Garbage Cans Emptied: *	Select an Option
Sidewalks Clear of Debris: *	Select an Option Yes No NA
Grass Mowed: *	
Sprinklers Functioning: *	

To answer a question, tap or select the *Select an Option* drop down menu next to each question. Locate and select the appropriate answer and continue to the next question.

Continue through the inspection until you have answered all of the questions with the appropriate answers.

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At the bottom of the inspection, notice that there is a text field labeled ***Comments***. Here you can leave any remarks about this inspection. Notice the red asterisk next to the field name indicating that this field is also required.

Once you have answered all of the inspection questions and left comments, click the ***Submit*** button submit your inspection results or click the *Cancel* button to return to the previous screen without completing the inspection.

4.)	Garbage Cans Emptied: *	Yes
5.)	Sidewalks Clear of Debris: *	Yes
6.)	Grass Mowed: *	No
7.)	Sprinklers Functioning: *	NA
8.)	Comments: *	I will mow grass this afternoon.

Submit Cancel

Now the results of this inspection will be automatically updated in Sprocket.

6.2 Inspection Results Search

If you submit an inspection and wish to view the results of the inspection, use the ***Inspection Results Search*** tab.

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This will direct you to a form you can fill out and view the results. In the ***Choose Inspection***, enter in the name of the inspection you wish to see the results for. Remember the *Auto Lookup Tool* will help locate the correct record in Sprocket if you either click the icon or enter into the text field all or part of the name of the inspection.

Once the desired inspection is returned, select it and begin creating search filters in the ***Create Filters*** section below. You must create filters because an inspection may be conducted on a monthly, weekly, or even daily basis. So, you use filters to narrow down your search for a specific occurrence of an inspection.

Use the *Create Filters* drop down menu to select which criteria you wish to search by. Let's say we wish to search for this inspection by the *Inspector* name. We want to see the inspection conducted by employee JSTEVENS specifically.

So, using the drop down menu, select *Inspector* from the list.

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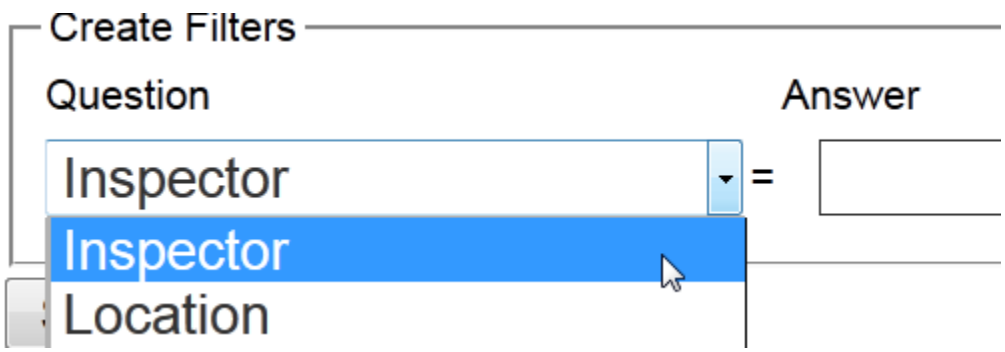
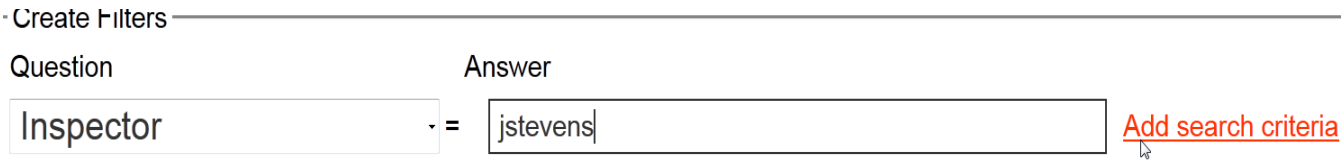
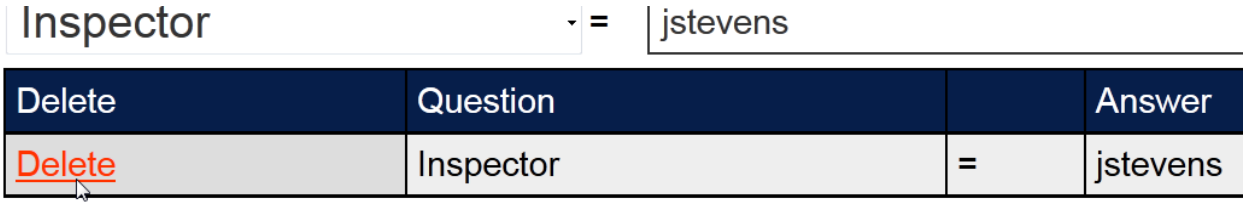


In the ***Answer*** field, type in *JSTEVENS.* Once you have entered the employee name into the text field, click the ***Add Search Criteria*** link to the right of the text field.



Once you have added this *Search Criteria*, a grid will appear displaying your *Search Criteria*. If you wish to remove this criteria, click the *Delete* link at the left of the grid.



If you wish to clear out this criteria and enter new search criteria, click the *Clear Search Criteria* link below the grid.

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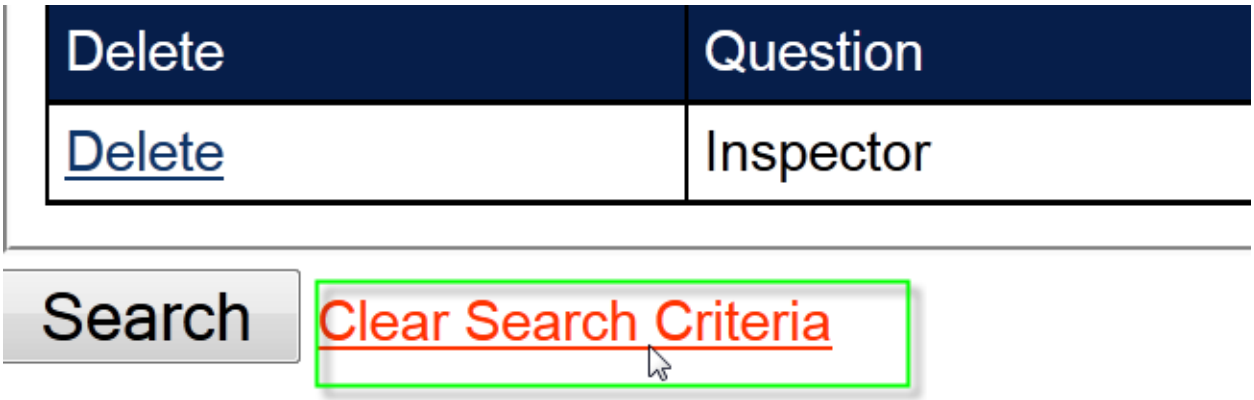
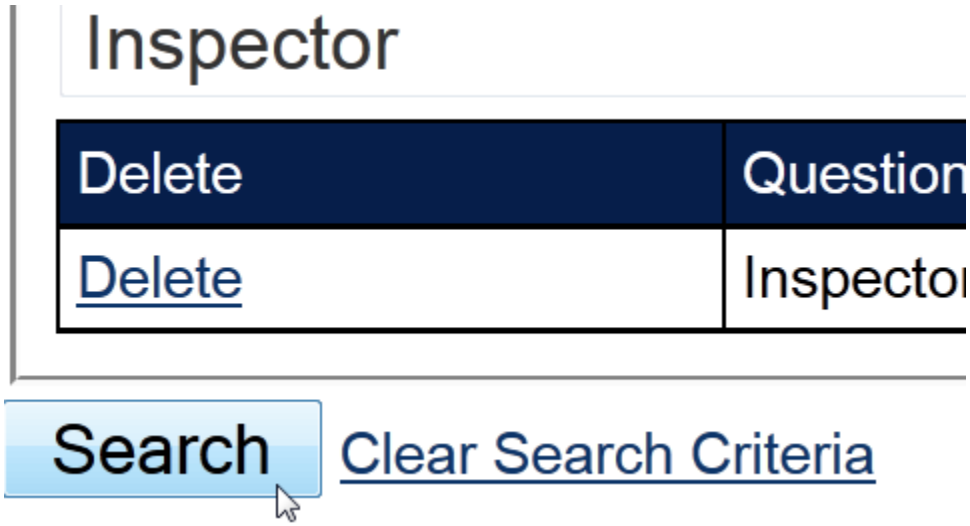


If you wish to use this criteria to search for the *Inspection Results*, click the ***Search*** button at the bottom left of the page.



A grid will appear at the bottom of the page that displays all inspections by this inspector, per our *Search Criteria*.

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	Name
⊞	**Weekly Grounds Inspection**
⊞	**Weekly Grounds Inspection**

Use the plus signs at the left of each inspection row to view the results of each inspection.

QuestionGroup: Weekly Grounds Inspection	
Inspector	Jstevens
Location	
Work Order Identifier	
Garbage Cans Emptied	Yes
Sidewalks Clear of Debris	Yes
Grass Mowed	No
Sprinklers Functioning	NA
Comments	I will mow grass today.

Now you will be able to view your *Inspection Results* after submitting them as well as when they were submitted.

7.0 Inventory Console

7.1 Inventory Overview

As a facility technician, you will use inventory items constantly in your day to day processes. This will involve issuing items for work orders, checking storerooms for availability, and submitting purchase requests to replenish inventory. The *Inventory Module* can help you do all of these things.

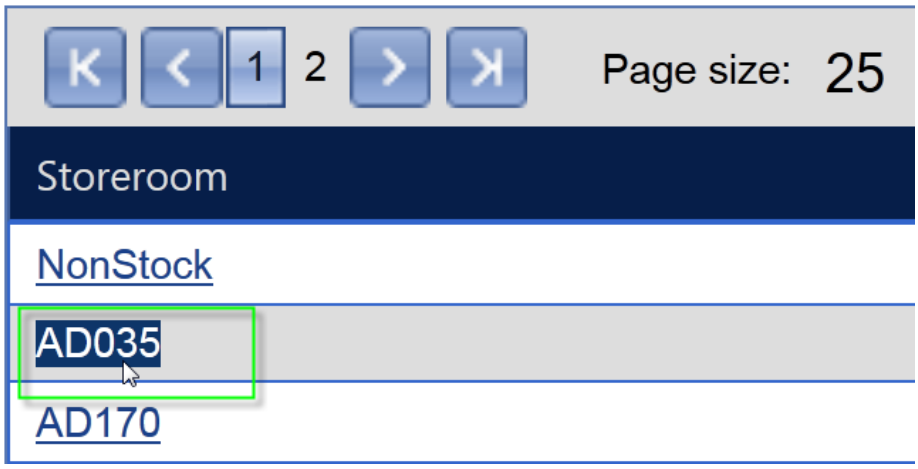
7.2 Inventory Checkout Search

Much like the *Materials* tab in *Work Order Details*, ***Inventory Checkout Search*** is used to check an item out of inventory for use for a work order or return it to inventory. To checkout or return an inventory item, navigate

Inventory →Inventory Checkout Search

Note: Sprocket is customized based on customer needs. Your screen may or may not display the above tabs. Contact your Sprocket Administrator with questions.

You will be directed to a screen that displays all of the storerooms where inventory is kept for your facility. To checkout an item from inventory, locate and select the desired storeroom.



Each storeroom name is a link. So let's say you wish to check out an item from the *AD036 Storeroom*. Simply click the name ***Master Storeroom*** and you will be directed to the checkout page.

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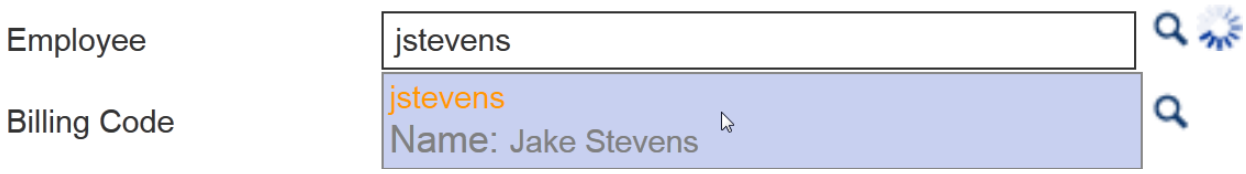
Here you can enter in the information for your inventory checkout. For the ***Employee*** field, enter in your employee name, or use the *Auto Lookup Tool* to locate and tap or select the correct employee name.



Next, enter in the correct billing code for this checkout. You can enter the ***Billing Code*** into the *Billing Code* field, or use the *Auto Lookup Tool* to locate and tap or select the correct *Billing Code*.

To search for the correct billiing code using the ***Auto Lookup Tool***, click the *Auto Lookup Tool* icon at the right of the field.

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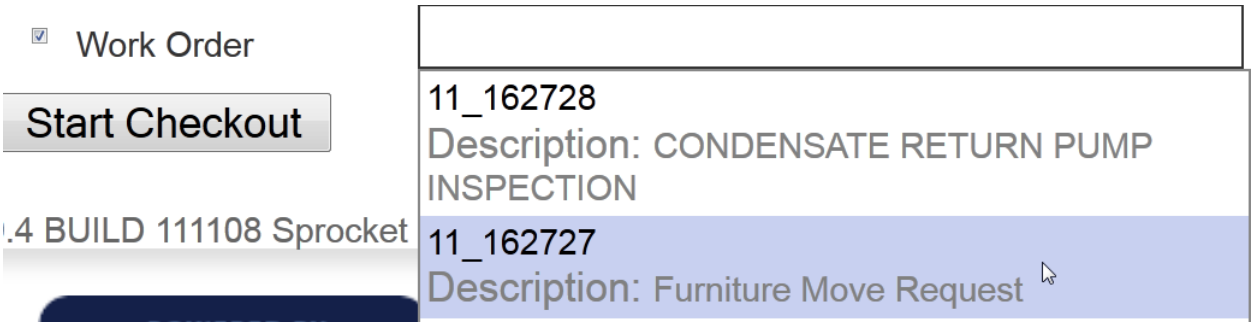
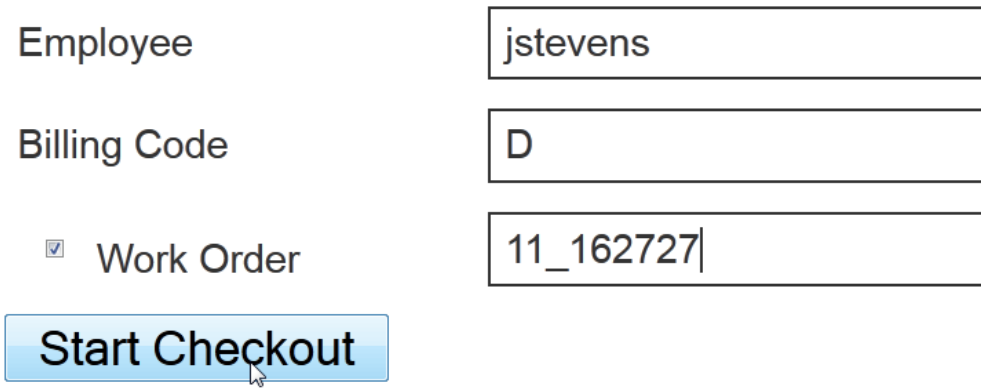
Name	Description
A	Billing Rate A
B	Billing Rate B
C	Billing Rate C
D	Billing Rate D

Note: Sprocket customizes screen settings as needed for customers. Your screen may or may not display the billing codes. These settings are based on configurations and can be customized or modified.

Next, select the work order for which you will be checking out an item.



Once you have entered in this information, click the ***Start Checkout*** button.



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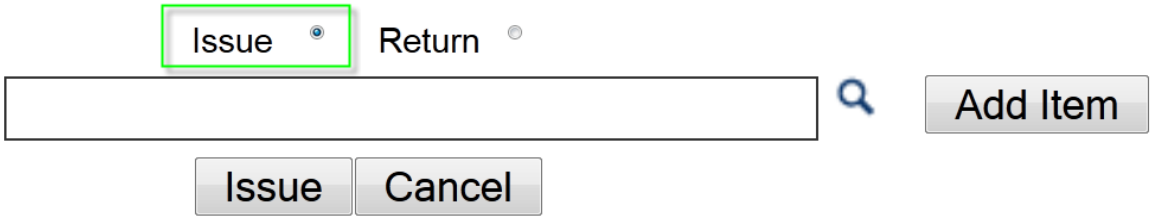
7.2.1 Issuing Items

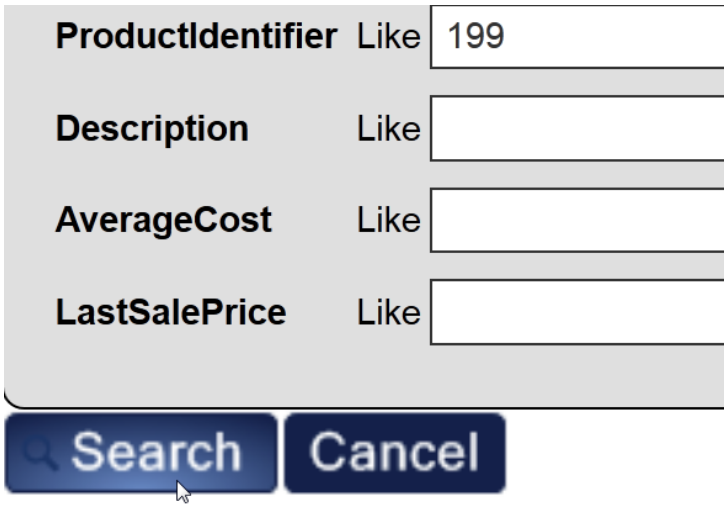
Now, you are directed to the ***Inventory Checkout*** screen. Here you can issue or return an inventory item. To check out an item, be sure that the ***Issue*** button is selected.



Next, in the ***Product Identifier*** field, click the ***Auto Lookup Tool*** to locate and select the correct inventory item. Selecting the *Auto Lookup Tool* brings you to a search screen. Here you will locate and select the item you wish to checkout from inventory.

Notice that there are search fileds located at the top of the screen to help you located and select inventory items. In the ***Product Identifier Like*** field at the top left of the screen,enter in all or part of the Product Identifier to search for your item.

In the ***Like*** field, type in part or all of the *Product Identifier* to search for an inventory item. Let's say you want to search for any item with the number ***199*** in the *Product Identifier*. Enter *199* into the *Like* field. Once you have entered in your search criteria, click the ***Search*** button to view search results.



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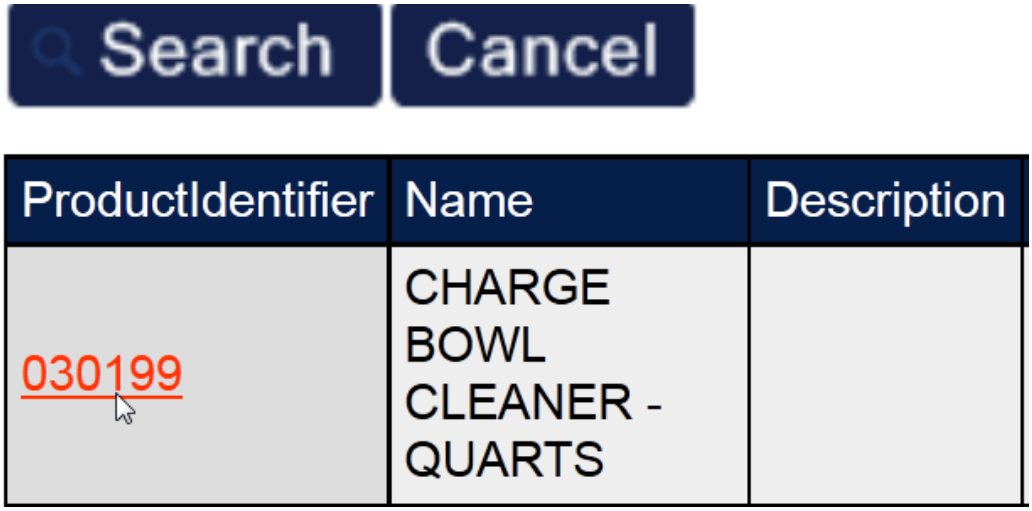
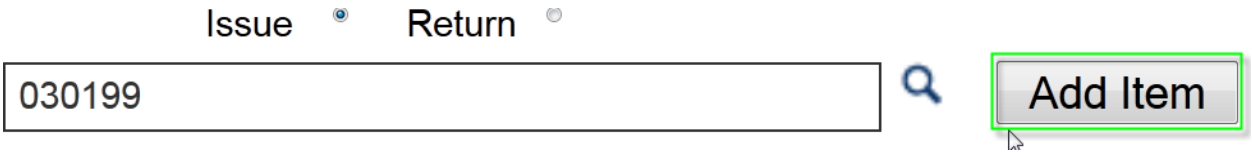
Once your search results are displayed, select the desired *Product Identifier* to return to the checkout screen.



Now your selected product is added to the *Product Identifier* field on the checkout screen. Click the ***Add Item*** at the right of the field to select it for a material issue.



Notice that this item is populated in a grid at the bottom of the screen. Now, you may select other items to add to this checkout transaction, if you wish.

Product Identifier	Description
030199	

If this is an item you do not wish to checkout, click the ***Remove*** button at the right hand side of the grid.

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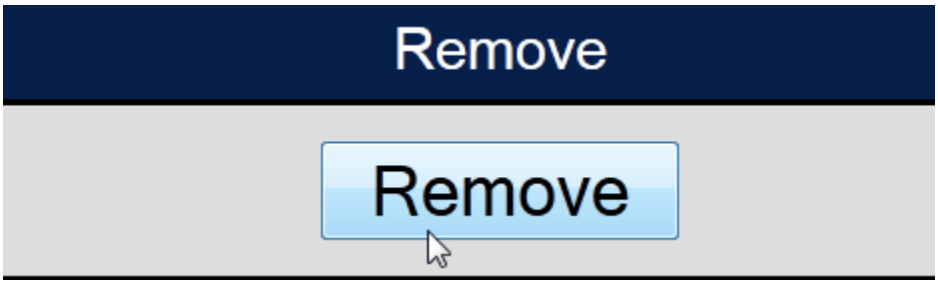
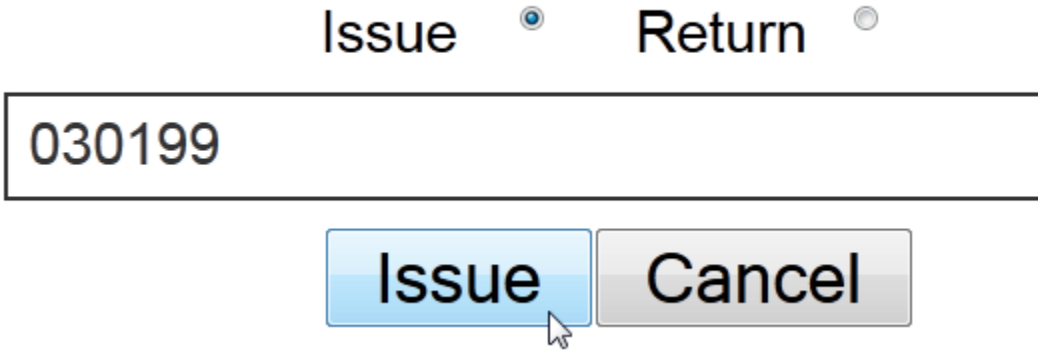


Once your search criteria is set, click the ***Issue*** button to yield search results.



A window will appear saying *Issue Successful*. Click ***OK*** to continue.

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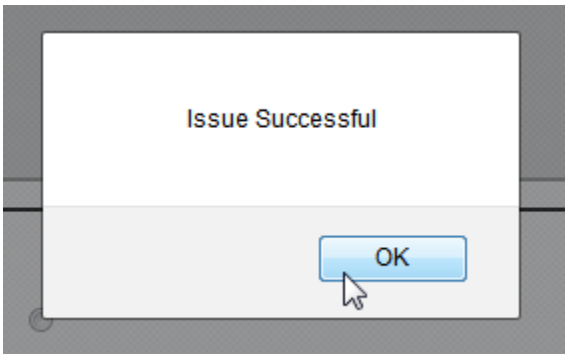
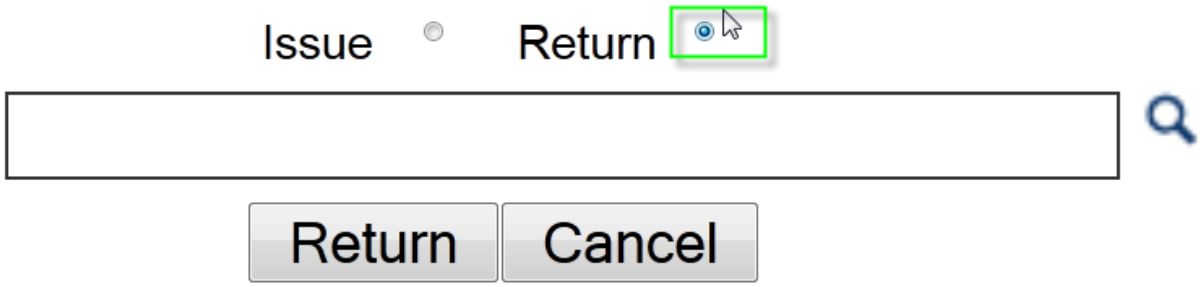


Now your checkout transaction has been completed. You will be returned to the Inventory Checkout screen where you may checkout another item to another work order.

7.2.2 Returning Items

You may also return items to inventory using the ***Inventory Checkout*** screen. . To return an item, be sure that the ***Return*** button is selected.



Next, in the ***Product Identifier*** field, click the ***Auto Lookup Tool*** to locate and select the correct inventory item. Selecting the *Auto Lookup Tool* brings you to a search screen. Here you will locate and select the item you wish to return to inventory.

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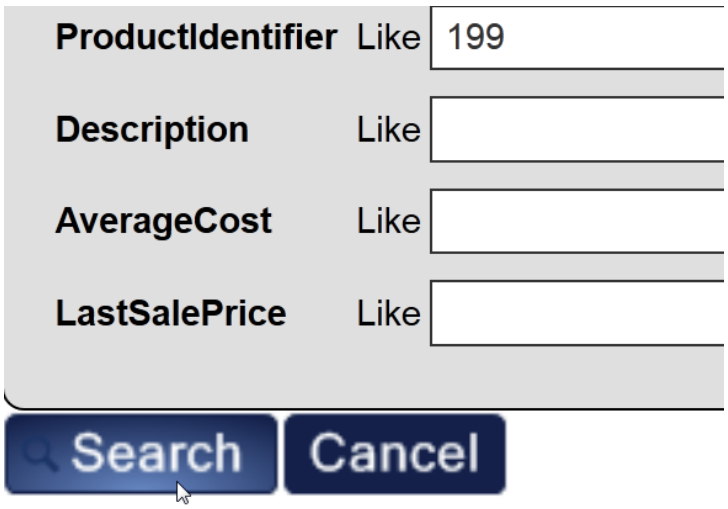
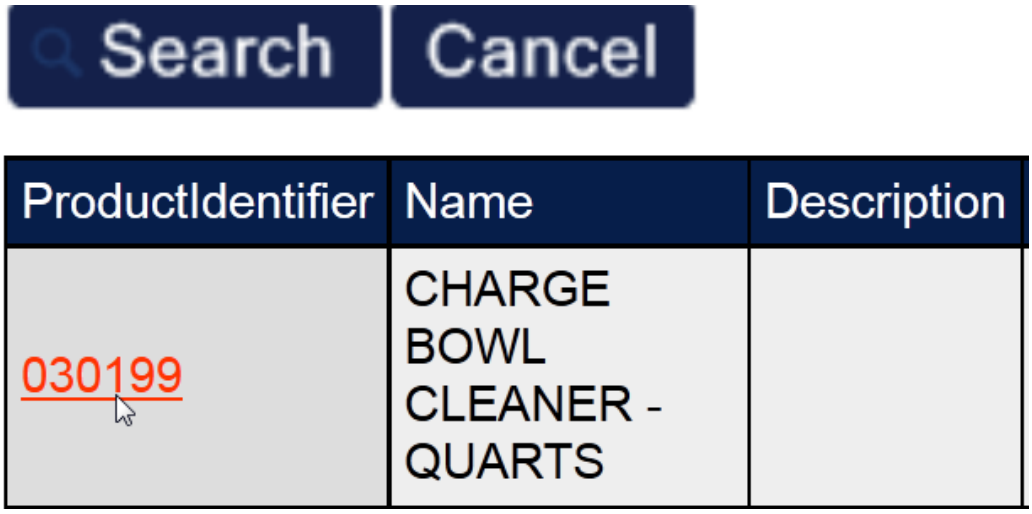
In the ***Like*** field, type in part or all of the *Product Identifier* to search for an inventory item. Let's say you want to search for any item with the number ***199*** in the *Product Identifier*. Enter *199* into the *Like* field. Once you have entered in your search criteria, click the ***Search*** button to view search results.



Once your search results are displayed, select the desired *Product Identifier* to return to the checkout screen.



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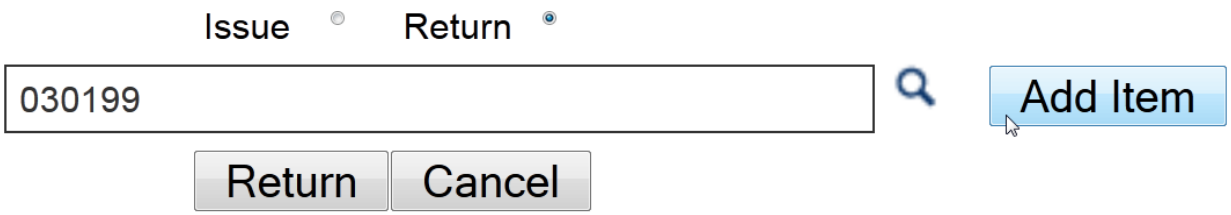
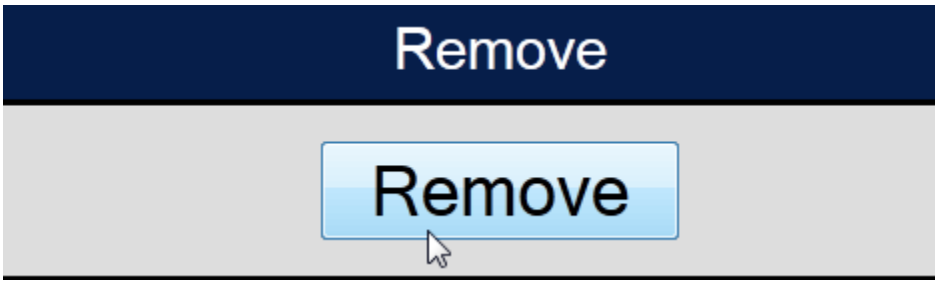
Now your selected product is added to the *Product Identifier* field on the checkout screen. Click the ***Add Item*** at the right of the field to select it for a material issue.



Notice that this item is populated in a grid at the bottom of the screen. Now, you may select other items to add to this return transaction, if you wish.

Product Identifier	Description
030199	

If this is an item you do not wish to return, click the ***Remove*** button at the right hand side of the grid.



Once your search criteria is set, click the ***Retrun*** button to yield search results.

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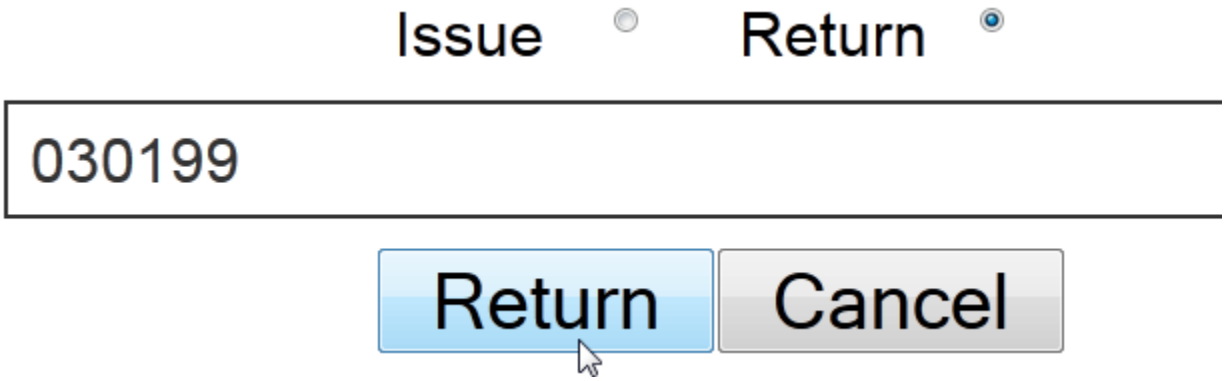
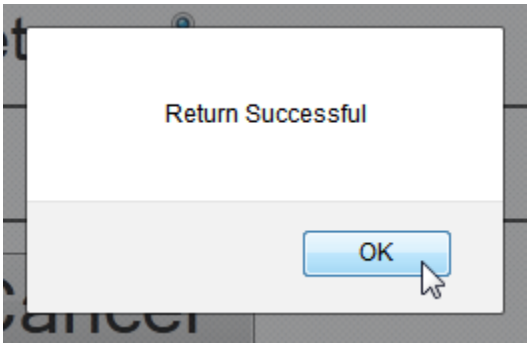


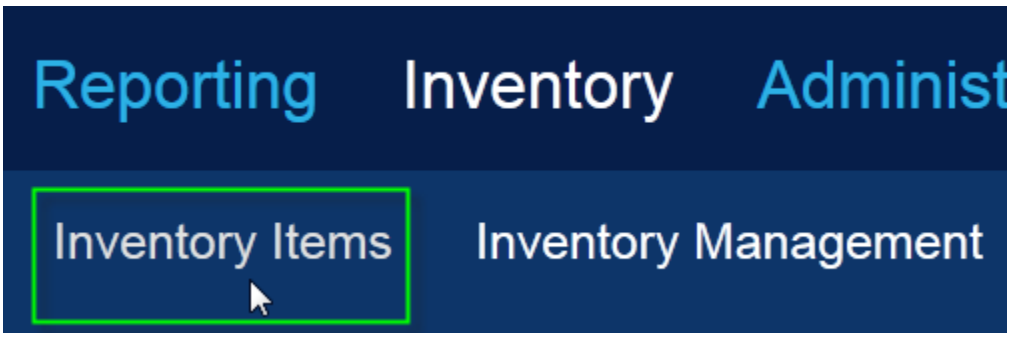
A window will appear saying *Return Successful*. Click ***OK*** to continue.



Now your return transaction has been completed. You will be returned to the Inventory Checkout screen where you may checkout another item to another work order.

7.3 Inventory Items

The ***Inventory Items*** tab is used to view what items a facility has in inventory.



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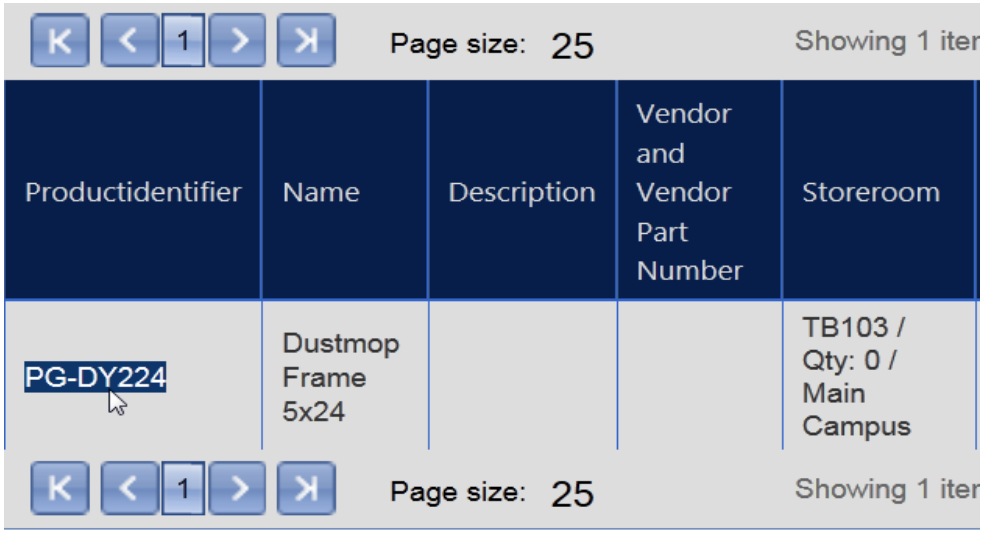
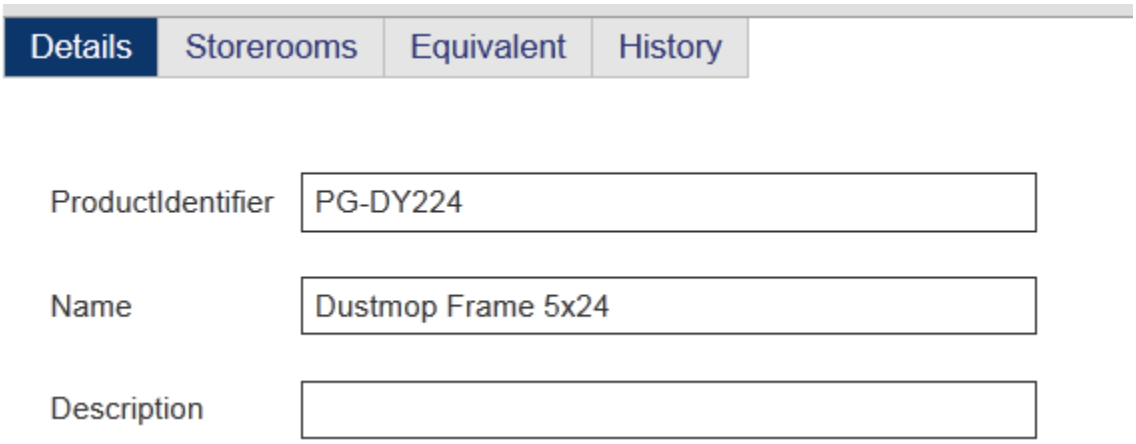
Once you select this tab, you will be directed to a list of all inventory items. Remember you can use the *Search* button in the upper left hand corner to apply *Search Criteria* to locate a specific item.

To view the details of a particular item, click the ***Product Identifier*** on the left hand side of the grid. This will take you to the ***Inventory Item Details*** form. Notice you are on the details tab.



7.3.1 Inventory Items Details Tab



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Add to Vendor
A.O. SMITH

Add to Storeroom
TB103

Add to Kit

Add Unit Of Measure

Attach File

Add Attributes
Inventory Type: TOOLS ()

Note: Sprocket is customized based on customer needs. Your screen may or may not display the above fields or information. It is common for inventory fields to be "read only." Contact your Sprocket Administrator with questions.

The Details tab displays basic and commonly needed information about this item. Notice the fields in the *Details* tab. Some fields may be highlighted in gray indicating that they are "read only" fields. Fields that are white are available for information to be added to them. To add or change information, simply click inside the field and enter your information.

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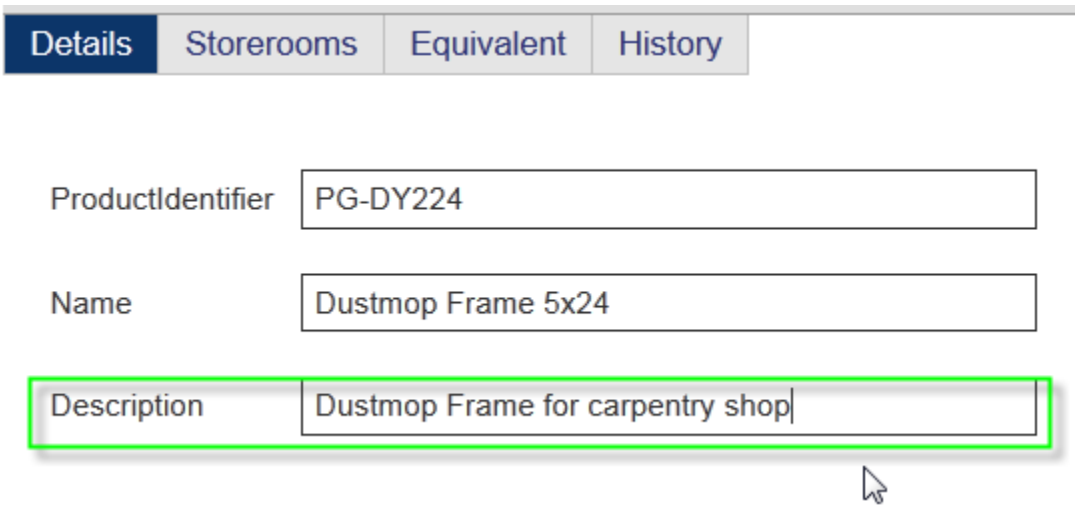

Note: Sprocket is customized based on customer needs. Your screen may or may not contain changeable fields. Contact your Sprocket Administrator with questions.

Notice the fields at the bottom of the screen. Rather than text fields where information is entered, these are meant to link inventory items other data tables in the Sprocket database such as vendors, storerooms, kits etc. If you wish to associate additional information to an inventory item, click one of these links and a form will appear. Here you can enter your additional information and cross reference an item to another data table in Sprocket.

The links at the bottom of the Details tab can be used to associate an item to several different data tables:

- Use the *Add to Vendor* link to display the vendor(s) that supplies this item to the facility. If you receive this item from multiple vendors, you can rank each vendor highest to lowest, indicate which vendor is preferred for supplying this item, and specify the vendor ID for this item.
- Use the *Add to Storeroom* link to display the storeroom where this item resides. You can add multiple storerooms as needed for items that are located in more than one storeroom location.

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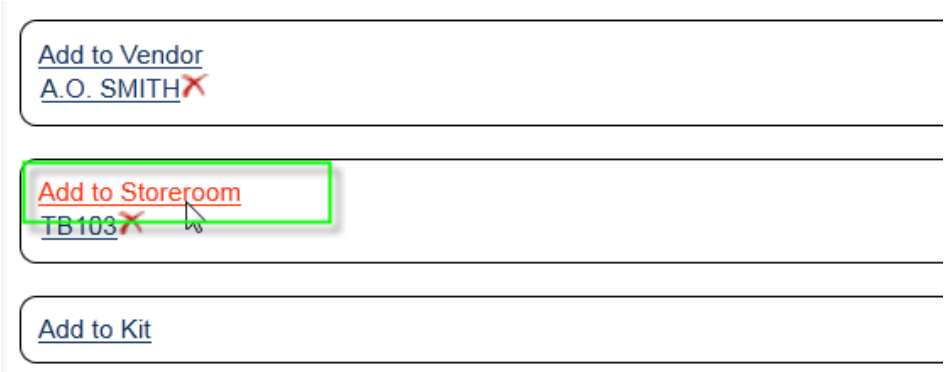
- Use the *Add to Kit* link to add this item to a *Reserved Materials* bundle or *Kit*. This way, when work needs to be completed that inevitably requires this item, it will automatically be added to a *Reserved Materials* list and checked out of inventory through the *Work Order Details*.
- Use the *Add Unit of Measure* link to specify what quantity of this product equals a unit. For example, one unit may be a case, a carton, a box etc. This way, when items are issued, you have a specified amount that is being distributed per unit issue.
- Use the *Attach File* link to attach files with additional information to this item. Common attachments are pictures of the item or a manual for the item.
- Use the *Add Attributes* link to associate equipment and inventory classification and sub types to this item. This helps further classify what this item is and what category it falls under.

Let's say you wish to link this item to an additional storeroom. Click the ***Add to Storeroom*** link.



A window will appear. Use the *Auto Look Tool* to help locate the appropriate record in Sprocket by either clicking the icon or typing all or part of the *Storeroom Name* into the field. When the correct record is returned, select it and continue filling out the form.

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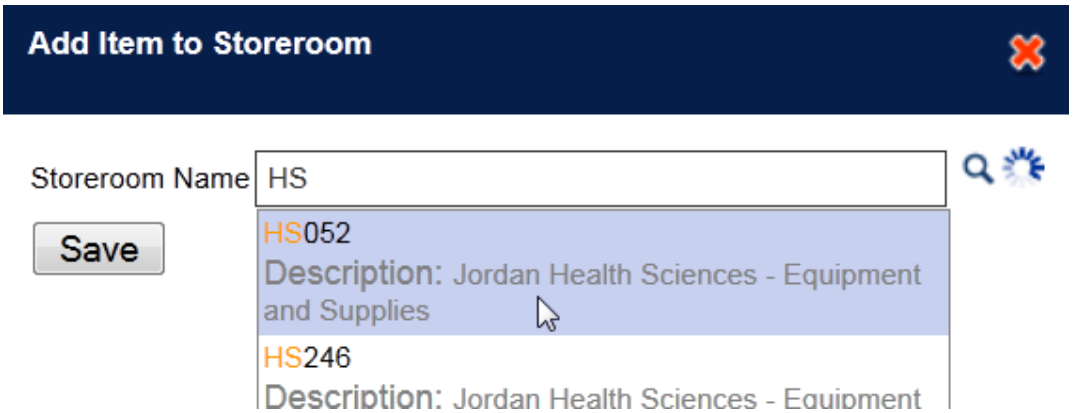
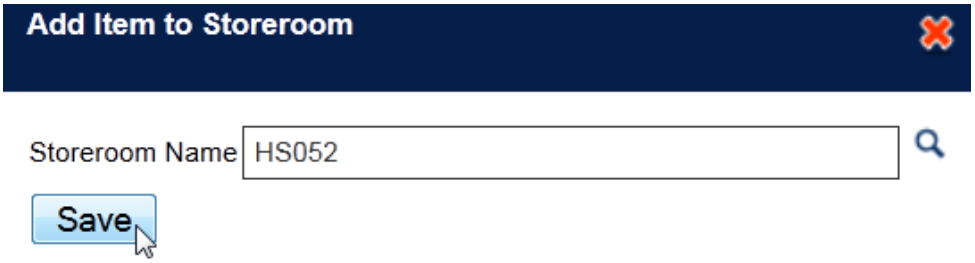
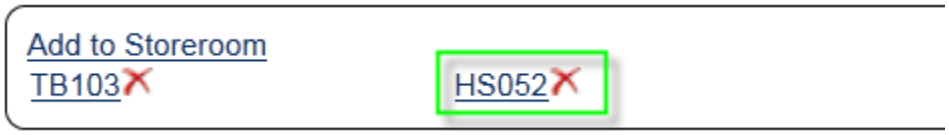


Once you have selected the desired storeroom, click the ***Save*** button in the window.



Now notice that the ***Storeroom*** field at the bottom of the page has been updated to include this storeroom.



If you ever wish to remove any of this information, just click the red ***X*** next to the link.

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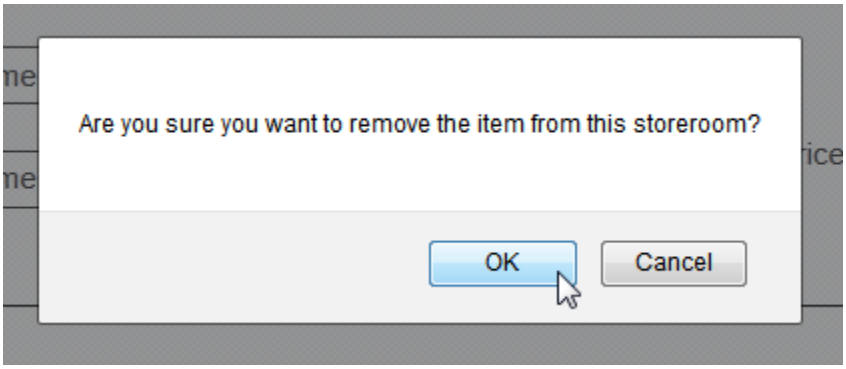
A window will appear asking if you are sure you want to remove this item. Click ***OK*** to continue or *Cancel* to return to the previous page.



Now this *Storeroom* has been removed from this inventory item. When adding information or making changes to an item, be sure to click the *Save* button in the upper right hand corner of the page to save your changes.

7.3.2 Inventory Items Storerooms Tab

The Storerooms tab provides information about where this product is located and what the current quantity is.

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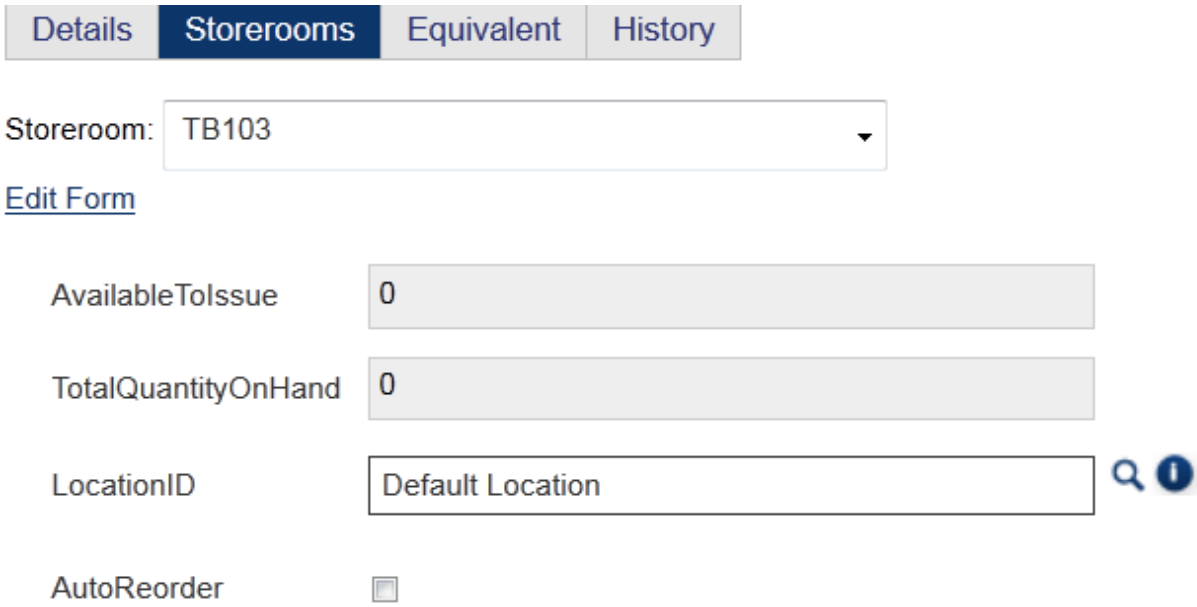
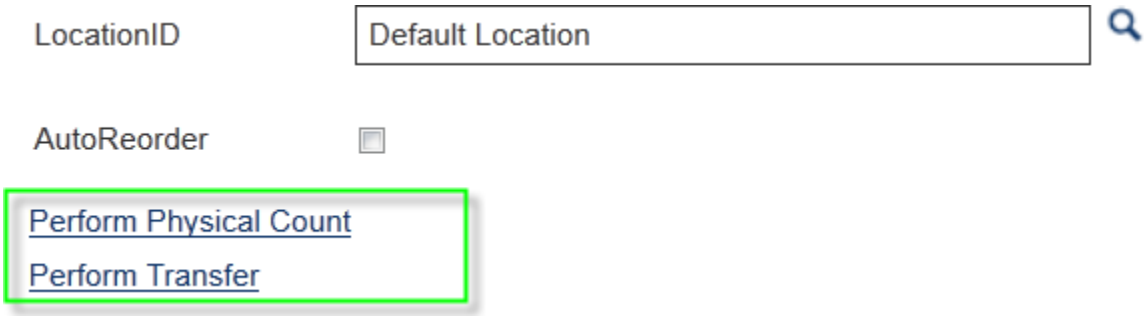


Note: Sprocket is customized based on customer needs. Your screen may or may not display the above fields. Many fields may be read only. Contact your Sprocket Administrator with questions.

Here you can add additional information as needs as well as view the storeroom location(s) for this item and view available quantity.

Notice the two links at the bottom of the page. Use these to count inventory and transfer item location to a different storeroom.



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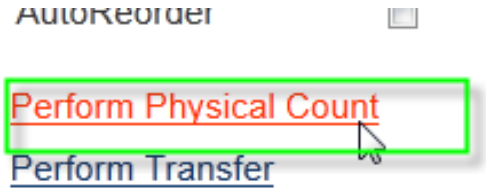
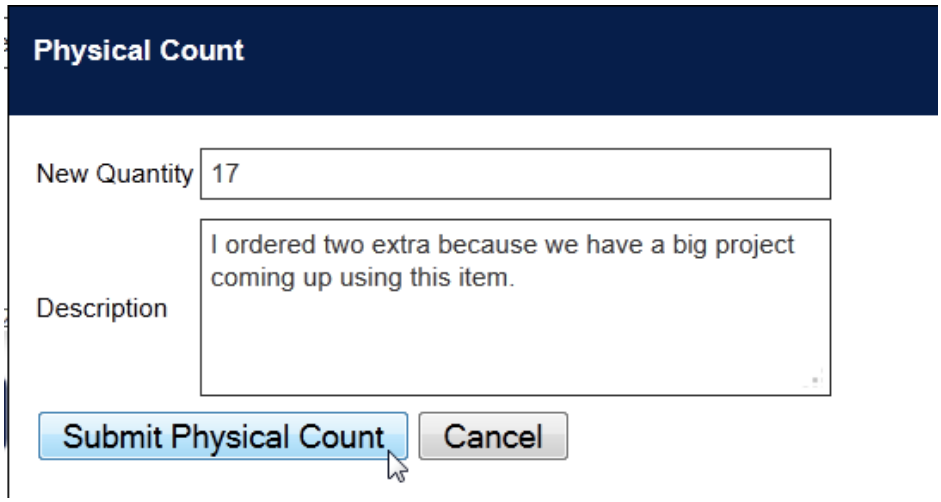
7.3.2.1 Perform Physical Count

Click the ***Perform Physical Count*** link at the bottom of the Storerooms tab to update an actual inventory count in Sprocket.



A form will appear. In the ***New Quantity*** field, enter in the amount of this item you counted. In the ***Description*** field below, enter in any additional details about the product or about this particular inventory count. Once you have entered in all the information about this *Physical Count*, click the ***Submit Physical Count*** button to submit the new inventory quantity or click the *Cancel* button to exit this window and return to the previous screen and old inventory quantity.



A window will appear saying *Success*. Click ***OK*** to continue.

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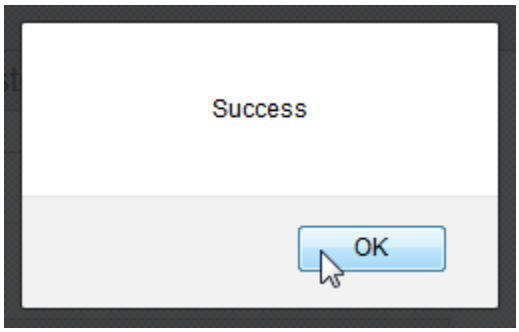
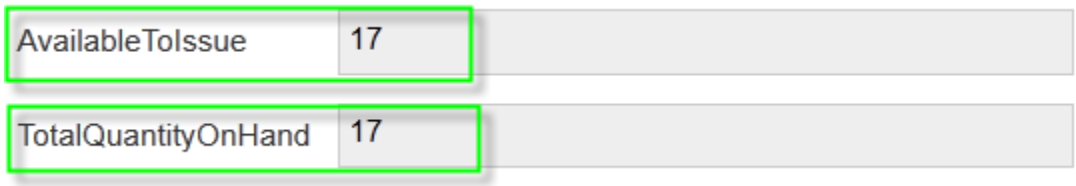


Now notice the *Available to Issue* and the *Total Quantity on Hand* fields have been updated with the new inventory quantity.



As always, when changing information in Sprocket, click the *Save* button in the upper right hand corner of the page to save your changes.

7.3.2.2 Perform Transfer

Use the ***Perform Transfer*** link at the bottom of the Storerooms tab to transfer all or part of the quantity of an item to another storeroom and/or billing code.

In the *Transfer* window, enter the amount you wish to transfer in the ***Quantity*** field at the top of the window. In the ***Storeroom*** drop down menu, select the storeroom you wish to transfer this item to.

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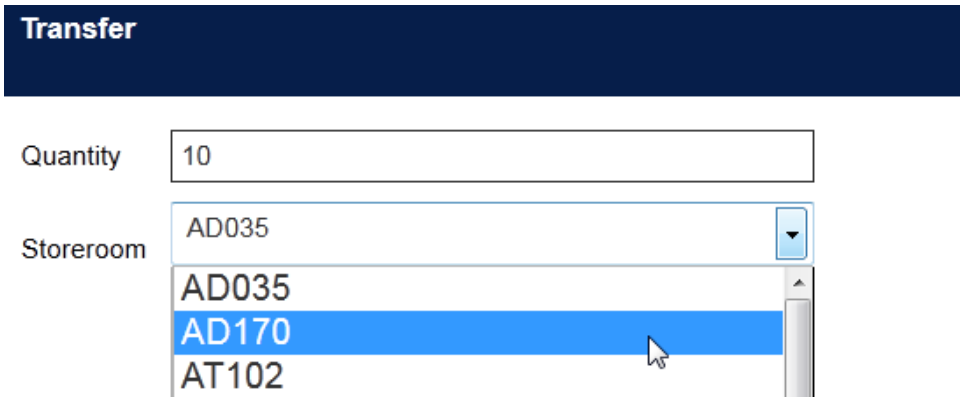
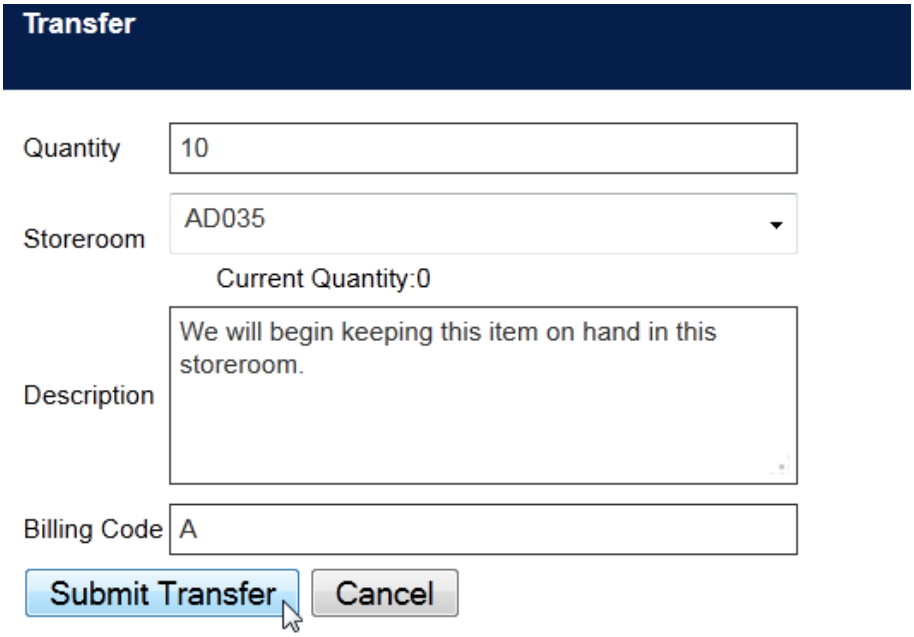


Next, in the ***Description*** field, you can enter in any comments or remarks about this transfer. At the bottom of the window in the ***Billing Code*** field, you can enter a different billing code to be associated to this item. Once all of the information is entered, click the ***Submit Transfer*** button to complete the transaction or click the *Cancel* button to stop the transfer and return to the previous screen.



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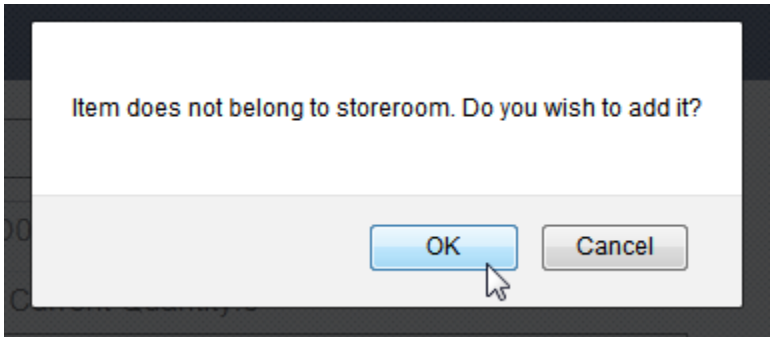
I window will appear saying this item does not belong to this storeroom, do you wish to add it? Click ***OK*** to continue the transfer or *Cancel* to return to the previous screen.



You will be returned to the *Details* tab where the additional storeroom you added will be displayed in the *Add to Storeroom* section at the bottom of the page.

As always, click the *Save* button in the upper right hand corner of the page to save your changes.

7.3.3 Inventory Items Equivalent

The ***Equivalent*** tab is used to display other inventory items that can be used as an equivalent substitute for this inventory item. On this tab, a grid is displayed showing any equivalents to this inventory item.

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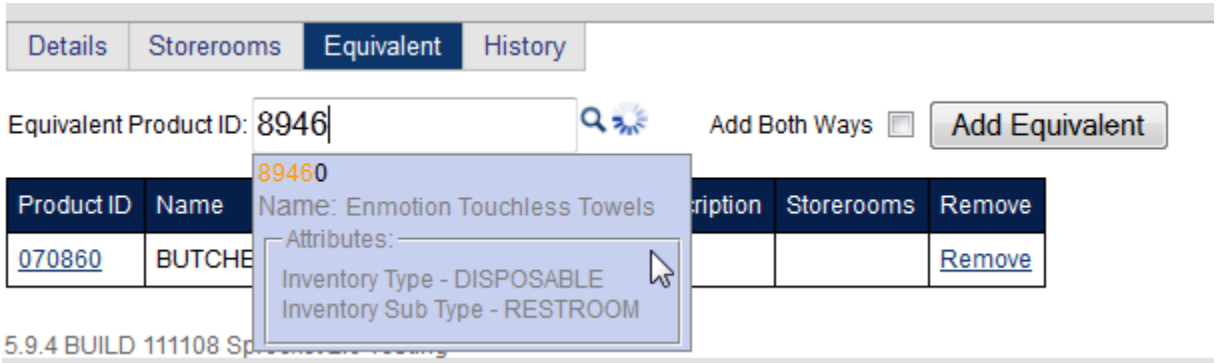
You may also use this tab to add or remove equivalents from an inventory item. To add an equivalent, use the *Auto Lookup Tool* next to the ***Equivalent Product ID*** field at the top of the page to either auto complete an entry to locate and select a product from a list of all possible products.



Once you have selected the *Equivalent Product ID* from the list, you must determine if you would like to add this equivalent both ways. This means that you automatically make both of these products substitutes for each other. If you would not like to substitute either of these products for the other, leave the ***Add Both Ways*** box unchecked.

If you would like to be able substitute either product for the other one, check the ***Add Both Ways*** box. Once this is done, click the ***Add Equivalent*** button to the right to update the grid below.

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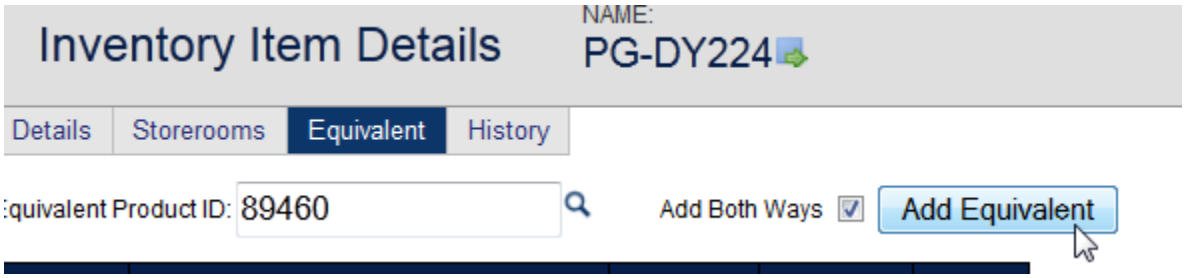
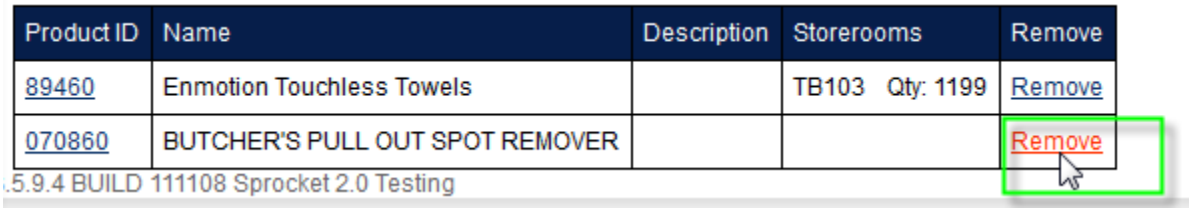


Now notice that the grid has been updated to include the new equivalent that you added.

If you ever wish to remove an equivalent from an inventory item, simply click the ***Remove*** link at the right of the grid for the product you wish to remove.



Be sure to click the *Save* button in the upper right hand corner of the page to save your changes.

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7.3.4 Inventory Items History Tab

The History tab allows you to see any transactions made with this product such as issues to work orders, transfers, quantity changes etc. A grid is displayed showing adjustments made to the item.

1 2 3 4 5 6 7 8 9 10 >>

Transaction Date	Product ID	Description	Transaction Type	Storeroom	Unit Quantity	Unit Cost	Unit Price
11/26/2011 2:18:20 PM	PG-DY224	Dustmop Frame for carpentry shop	QuantityAdjustment	AD035	10	0	0
11/26/2011 2:18:20 PM	PG-DY224	Dustmop Frame for carpentry shop	QuantityAdjustment	TB103	7	17	0
11/26/2011 2:18:20 PM	PG-DY224	Dustmop Frame for carpentry shop	ReceiveTransfer	AD035	10	0	0
11/26/2011 2:18:20 PM	PG-DY224	Dustmop Frame for carpentry shop	IssueTransfer	TB103	10	0	0

Notice the search fields at the top of the page. Use these to add filters and narrow down search results. So, let's say you wish to see any inventory transactions for this item that were made after November 20, 2011. Enter *November 20, 2011* in the ***On or After*** field at the top of the page and click the Search button above the history grid.

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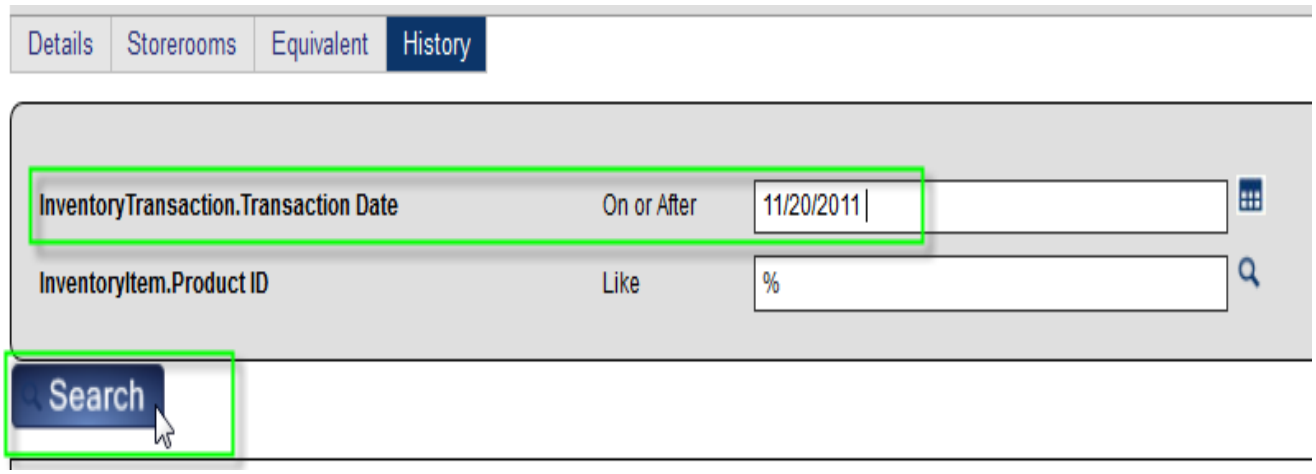

Now you are able to view transactions for this item using a date filter. Click the *Exit* button in the upper right of the page to return to the *Inventory Items* page.

7.4 Inventory Management

Much like the *Storerooms* tab in *Inventory Item Details*, the ***Inventory Management*** tab is used to perform *Physical Counts* for inventory items as well as transfer items among storerooms.

7.4.1 Inventory Management Transfer Tab

When you click *Inventory Management*, you are automatically directed to the ***Transfer*** tab. Use this form to transfer inventory items to different storerooms and billing codes. A form will be displayed for you to fill out the appropriate information about the transfer.

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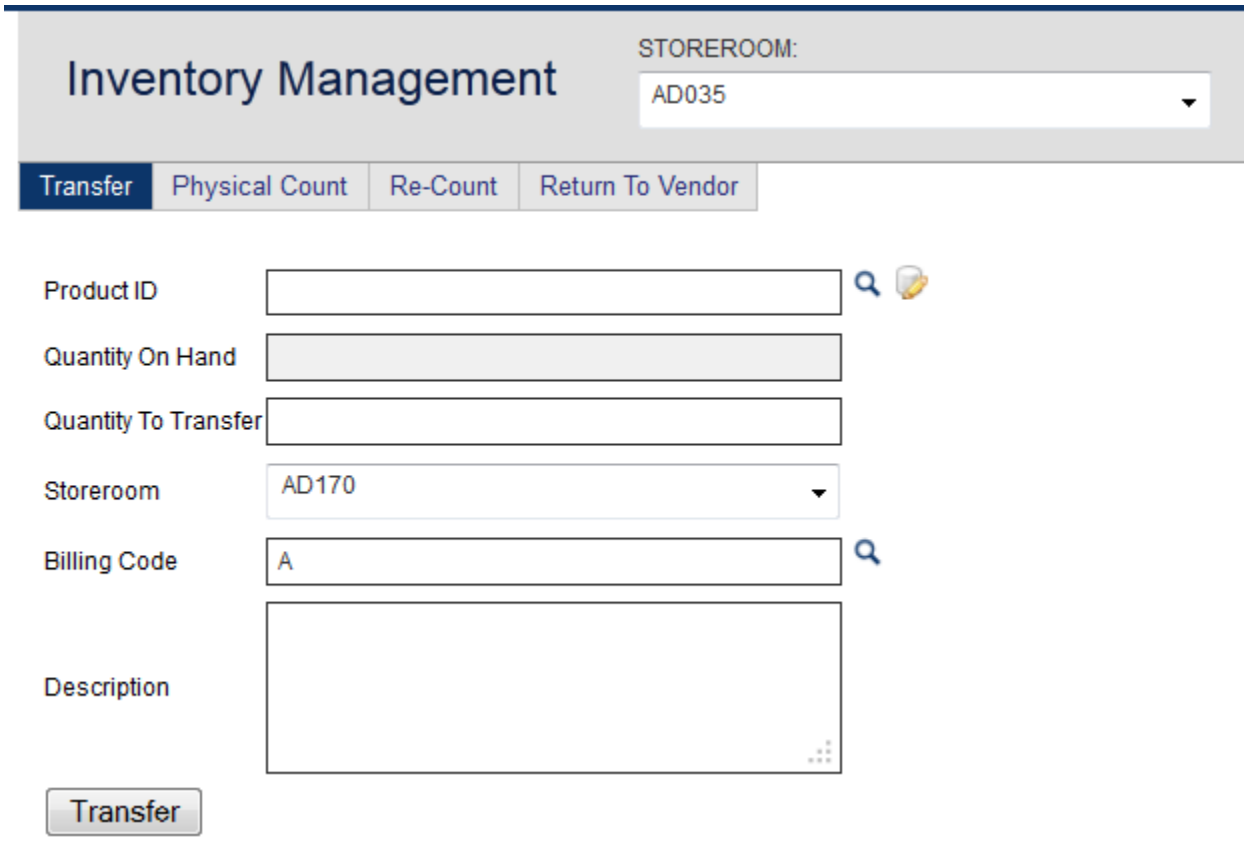
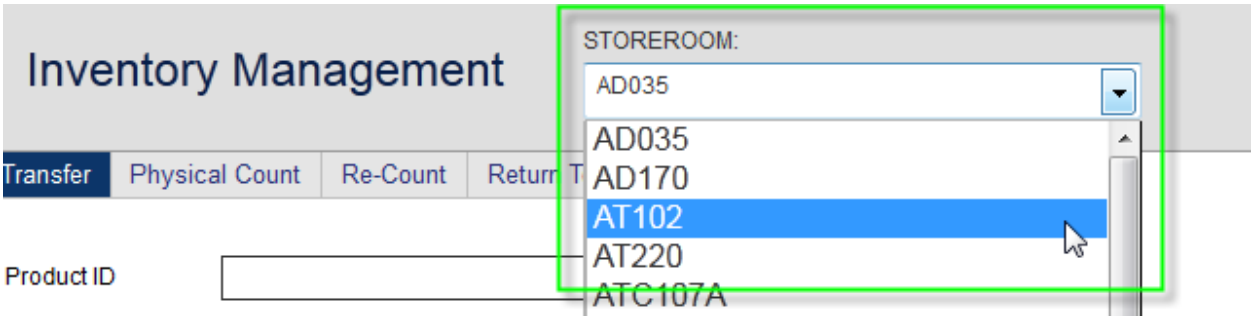


Notice the Storeroom drop down menu at the top of the page. Use this to locate and select the storeroom you wish to transfer from.



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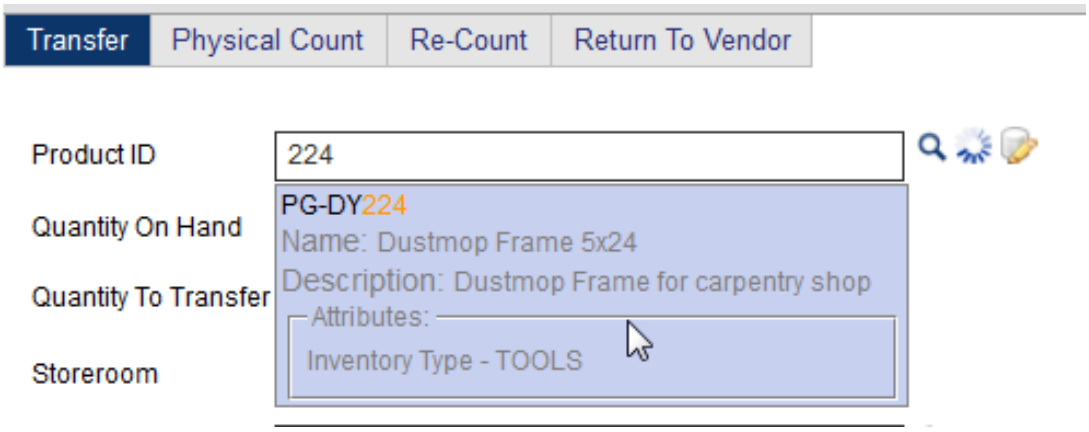
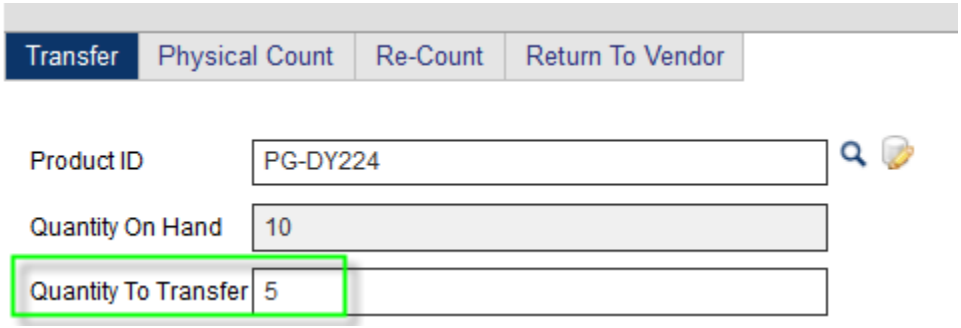
Once you have chosen a storeroom, use the ***Product ID*** *Auto Lookup Tool* to locate and select the item you wish to transfer. Once the results are returned, select the item you wish to transfer.



Notice that the Quantity on Hand field automatically populates the quantity of that Product ID that resides in the above selected storeroom. Below, in the ***Quantity To Transfer*** field, enter the quantity you wish to transfer to a new storeroom.



In the ***Storeroom*** drop down menu below, select the storeroom you would like to transfer this item to.

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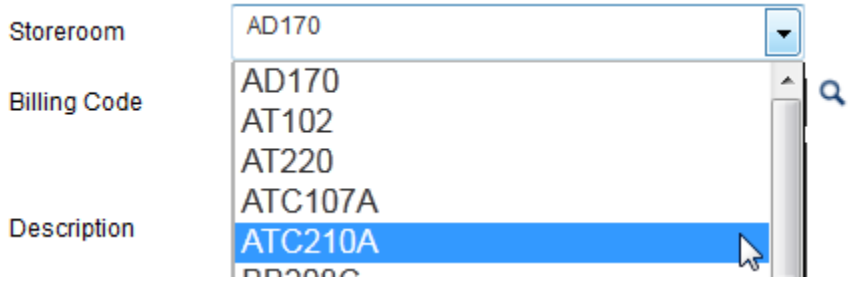
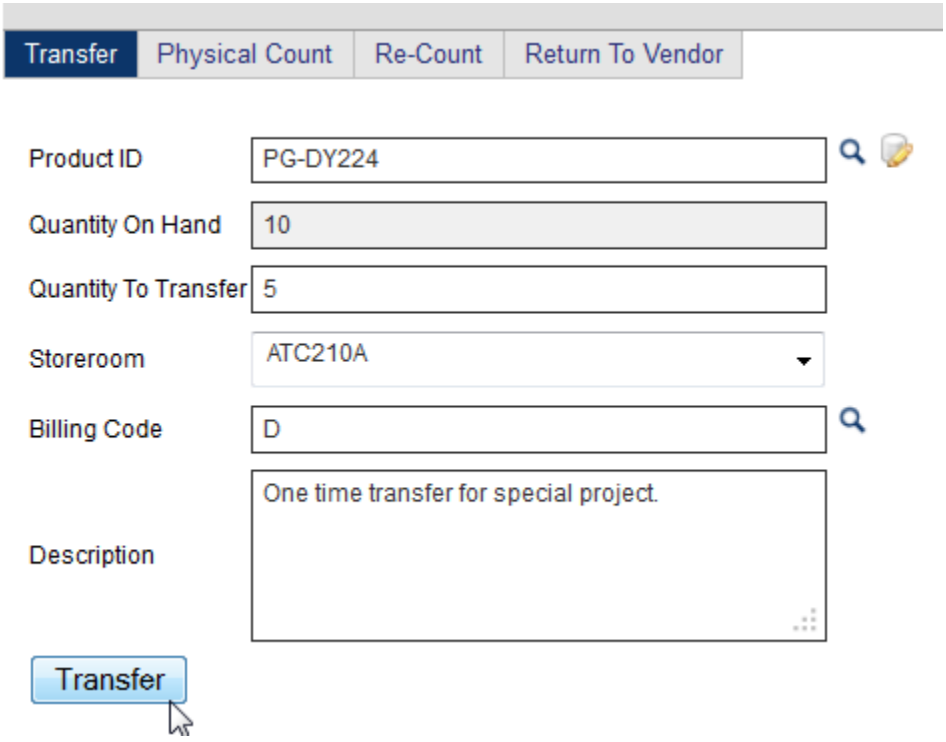


Below in the ***Billing Code*** field, select the billing code for this item using the *Auto Lookup Tool* and use the ***Description*** field to enter any remarks about this transaction.

Once this has all been filled out, click the ***Transfer*** button at the bottom left of the page to finish the transaction.



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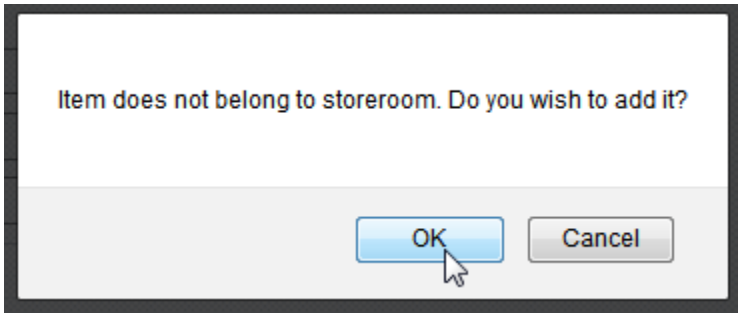
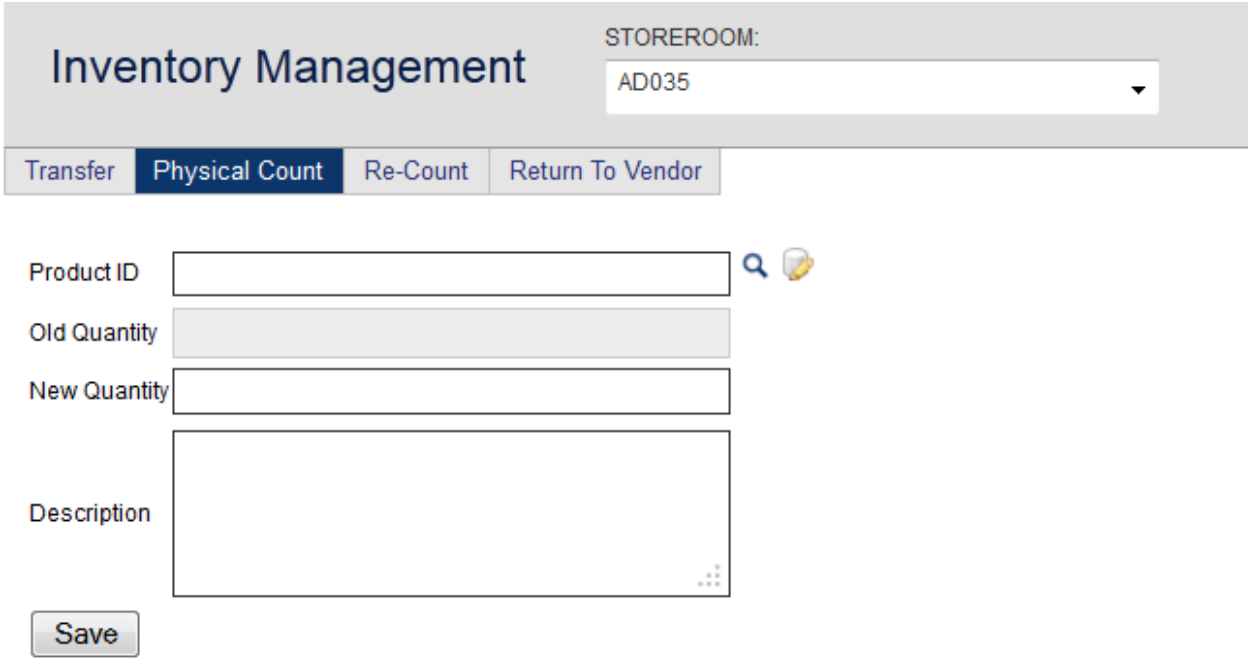
A window will appear saying this item does not belong to this storeroom, do you want to add it? Click ***OK*** to continue or *Cancel* to return to the previous page.



This will complete your transaction and transfer this item to the new storeroom and/or billing code.

7.4.2 Inventory Management Physical Count

The ***Physical Count*** tab allows you to update inventory counts in Sprocket. Once you click the tab, you will be directed to a form which can fill out with the accurate inventory quantity information.



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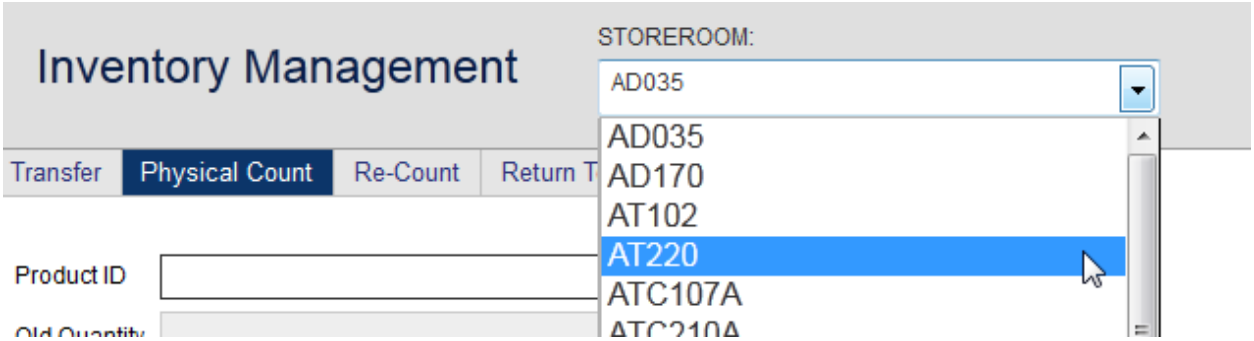
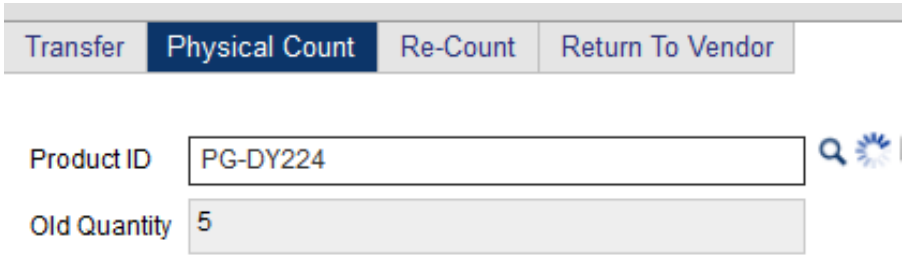
Notice the ***Storeroom*** drop down menu at the top of the page. Use this to select the storeroom you will be counting in.



In the form below, use the ***Product ID*** *Auto Lookup Tool* to locate and select the item you are counting. Once the results are returned, notice that the ***Old Quantity*** filled is automatically populated with the old quantity on hand for this item.



Now, in the ***New Quantity*** field, enter the amount that you counted of this item. Use the ***Description*** field at the bottom of the page to enter any comments or remarks about this item quantity. Once all of your information has been entered, click the ***Save*** button at the bottom of the page to update the item quantity.

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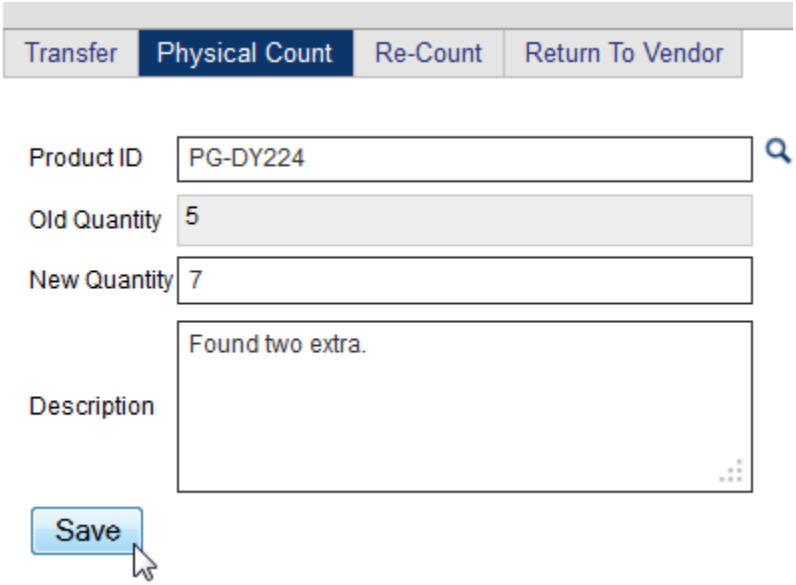
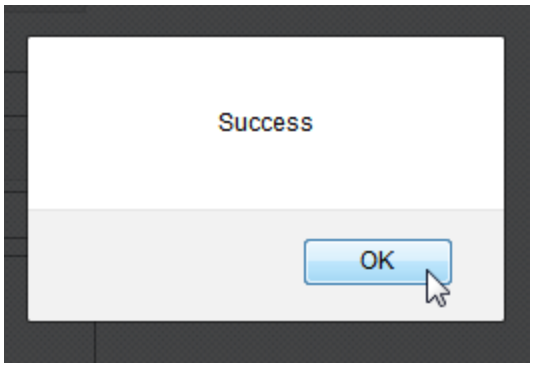


A window will appear saying *Success*. Click ***OK*** to continue.



Now you may enter an amount for another item to update the quantity.

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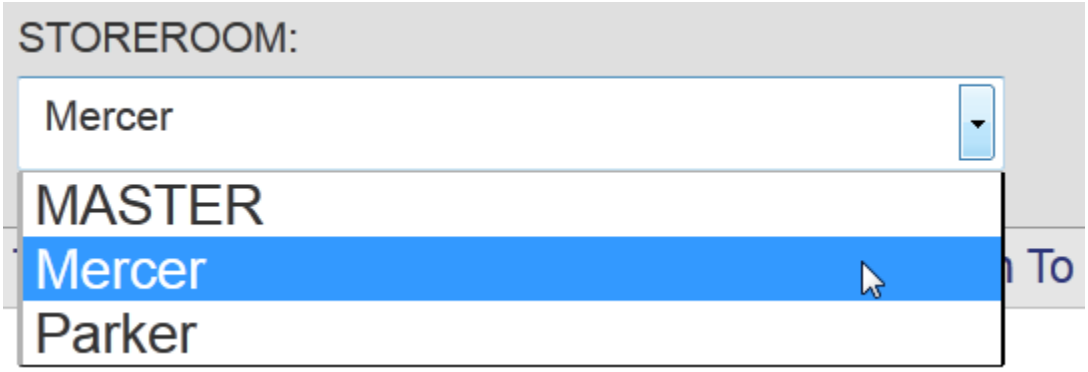
7.4.3 Inventory Management Re-Count

The ***Re-Count*** tab is used to submit any pending physical counts. Click the ***Submit All*** link to submit pending physical counts for recounting.

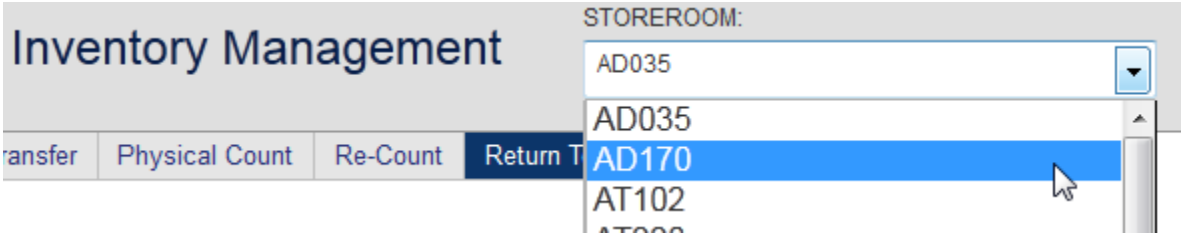
Use the Storeroom dropdown menu at the top of the screen to select a storeroom for recounting.



Here you will see any pending physical counts. Click the ***Submit All*** link to submit for recounting.

7.4.4 Return to Vendor

Use the ***Return to Vendor*** tab to return items to vendors and properly update inventory. Use the ***Storeroom*** drop down menu at the top of the page to select a storeroom.



In the form below, use the ***Product ID*** *Auto Lookup Tool* to locate and select the desired inventory item.

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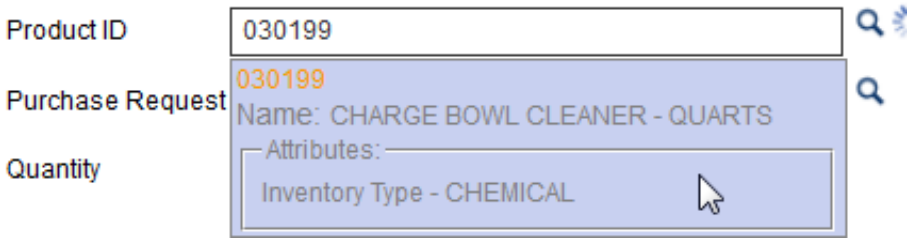

Use the ***Purchase Request*** *Auto Lookup Tool* to locate the correct purchase request for this item.

PRIdentifier	VendorID	AccountCodeID	ProjectAccountID	UserID
11_00002	BCS			JHAFER
11_00003	GEM			JHAFER

In the ***Quantity*** field enter in the quantity you wish to return to the vendor. Use the ***Description*** field to enter in any remarks about this transaction.

Once you have entered in all of your information, click the ***Return*** button at the bottom left of the page.

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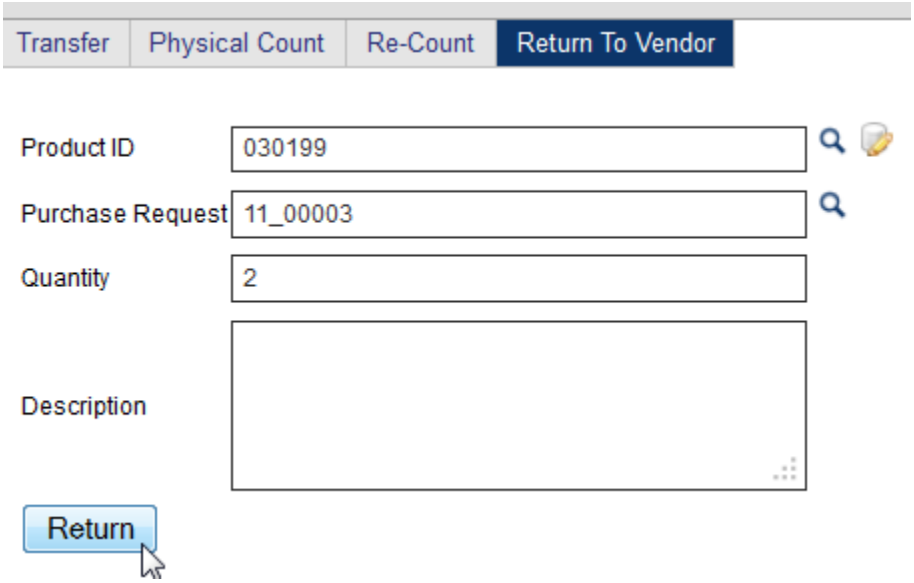

Now you may choose another item to return to a vendor or exit out of ***Inventory Management***.

7.5 Purchase Requests

The ***Purchase Requests*** tab is used to view previous purchase request made by other employees as well as submit purchase requests to replenish inventory. You will use this tab when you wish to have management order more inventory items for employee use. When you click the *Purchase Requests* tab, a grid will display previous purchase requests.

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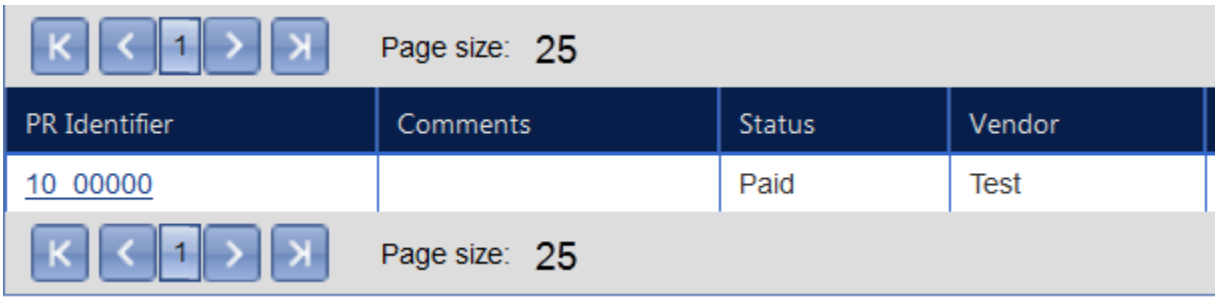

To submit a *Purchase Request*, click the ***New Purchase Request*** button at the top left of the grid.

7.5.1 New Purchase Request Vendor Tab

You will be directed to a form to fill out. Notice that you are on the ***Vendor*** tab.

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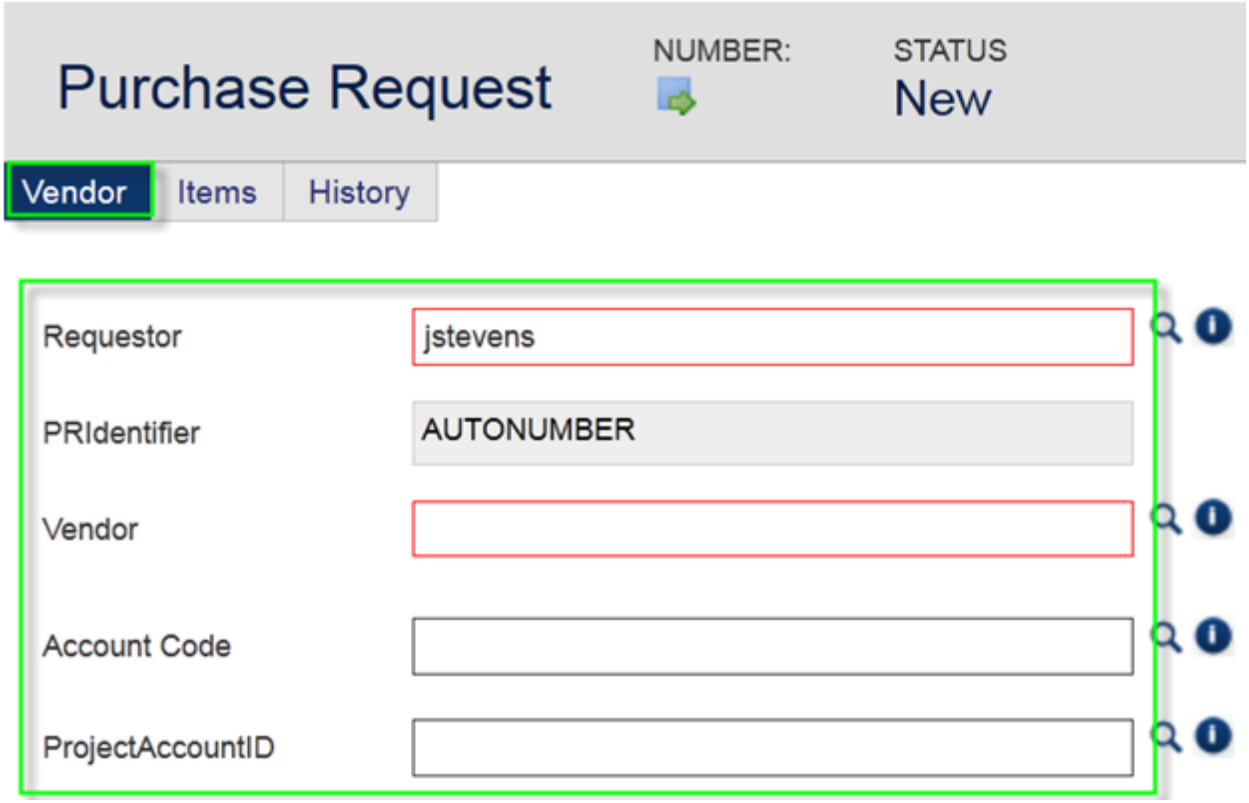
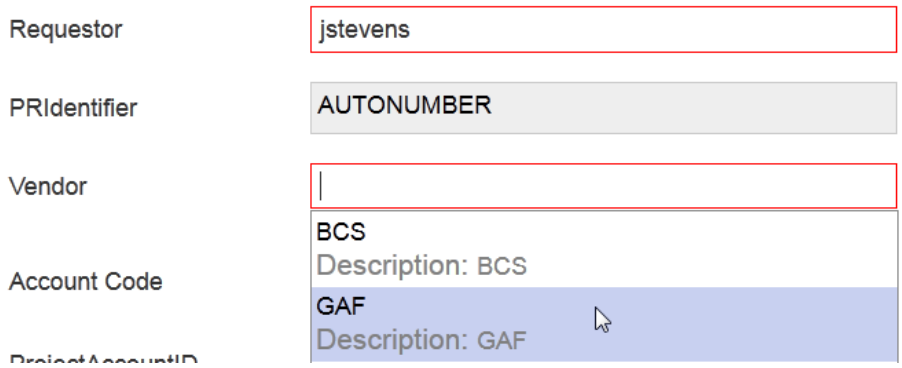


Note: Sprocket is customized based on customer needs. Your screen may or may not display the above fields. Contact your Sprocket Administrator with questions.

Begin filling out the form on the *Vendor* tab. Note that fields outlined in red are required and fields that are white are optional.



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Remember that some fields, such as *Account Code* and *Vendor*, have the *Auto Lookup Tool* next to them. Use the icon to help located records in Sprocket.

Once you have filled out all the required information on the Vendor tab, be sure to click the *Save* button in the upper right hand corner of the page to ensure that your entries are saved. Notice that after saving the information on the *Vendor* tab, a *Purchase Request Identifier* appears at the top of the page. This will be the number used to reference this transaction.

7.5.2 New Purchase Request Items Tab

Now click the *Items* tab at the top of the page. Use this form to select the inventory items you wish to request for purchasing.

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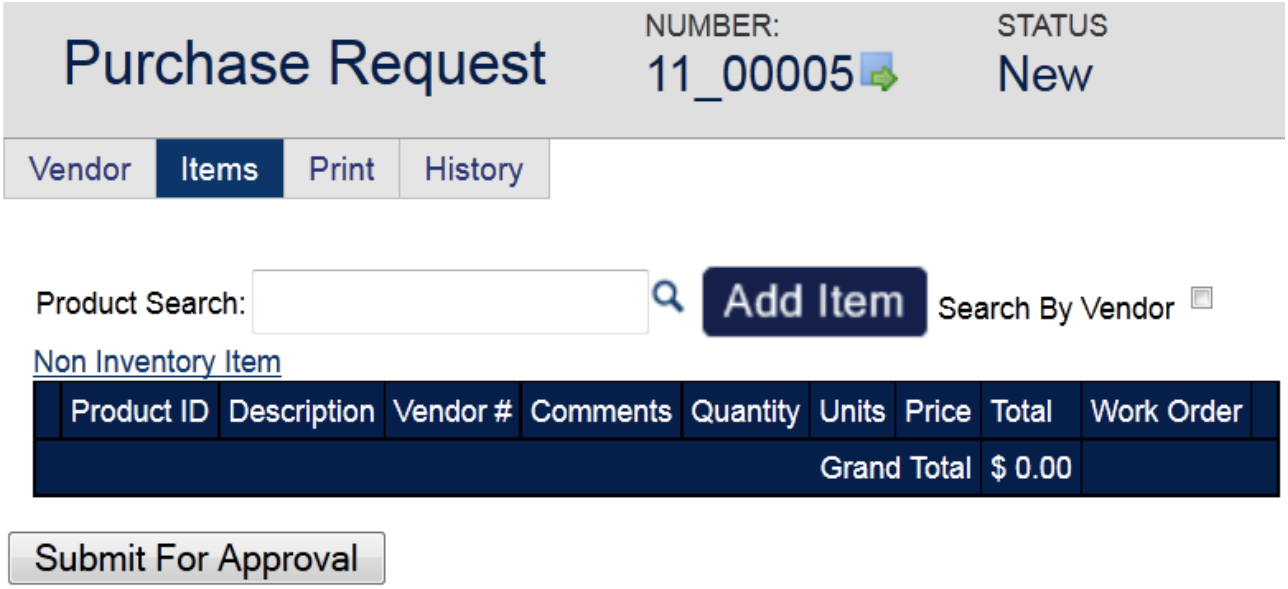

Here we will search for inventory items to add to this *Purchase Request*. You can search for products by product name or by vendor. Notice the ***Product Search*** field is displayed indicating that searching by product is the default search setting.

7.5.2.1 Selecting Products by Product Identifier

To begin selecting items for this *Purchase Request*, use the ***Product Search*** field at the top of the page to search for and enter the products for this transaction. Notice that the *Product Search* field has the *Auto Lookup Tool* next to it. Either begin typing all or part of the name of the product and the *Auto Lookup*

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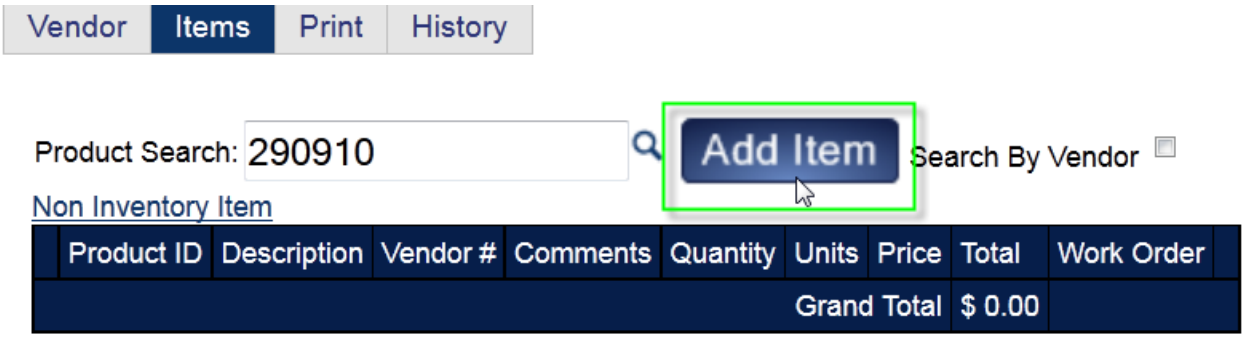
Tool will return results, or click the *Auto Lookup Tool* icon to view an entire list of inventory items to select from.

Once you have selected the desired item, click the ***Add Item*** button to the right of the *Product Search* field.



Notice that the grid at the bottom of the page is updated with the product you selected.

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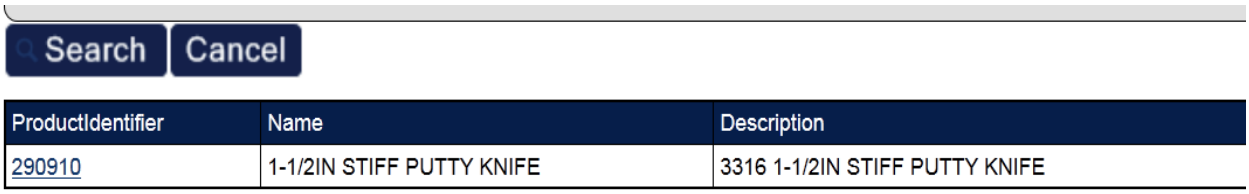
	Product ID	Description	Vendor #	Comments	Quantity
Remove	290910	3316 1-1/2IN STIFF PUTTY KNIFE			1

7.5.2.2 Selecting Products by Purchase Request Vendor

You may also search for products by *Vendor*. To do this, check the ***Search By Vendor*** checkbox at the right of the screen.

Now, in the *Product Search* field, use the *Auto Lookup Tool* to locate and select the desired product. Notice that the list may be very small. By checking this box, you are only able to select products that are supplied by the *Vendor* you entered in on the *Vendor Tab*.



This list displays only one item. To select it, click the ***Product Identifier*** in the far right hand side of the grid.

Now this *Product Identifier* will be populated in the *Product Search* field on the *Items* tab. Click the ***Add Item*** button to add it to the grid.

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Now notice that the grid at the bottom of the page is updated to include this product.

7.5.2.3 Selecting Non-Inventory Items

You may also submit *Purchase Requests* for non-inventory items. To do this, click the ***Non Inventory Item*** link above the items grid at the bottom of the page.

Notice that the form above changes with new fields to fill out.

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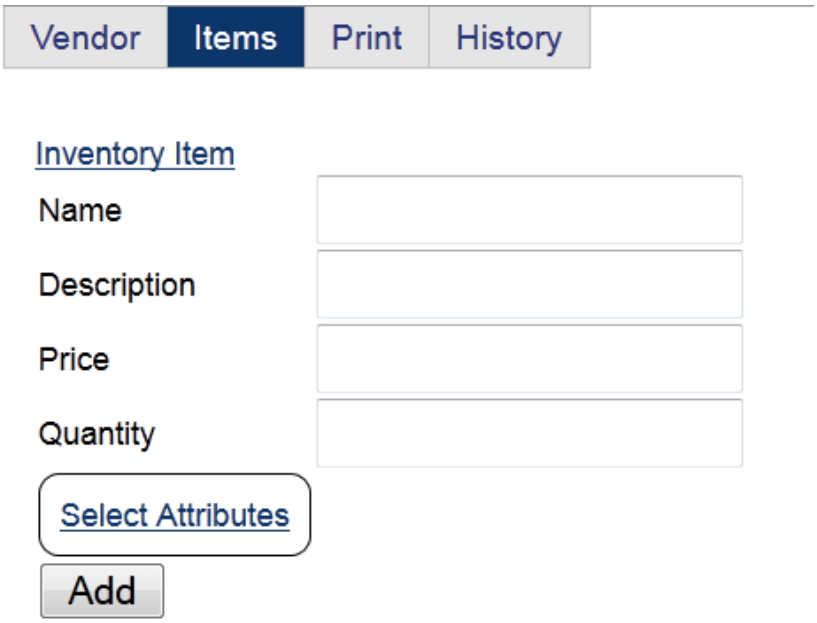
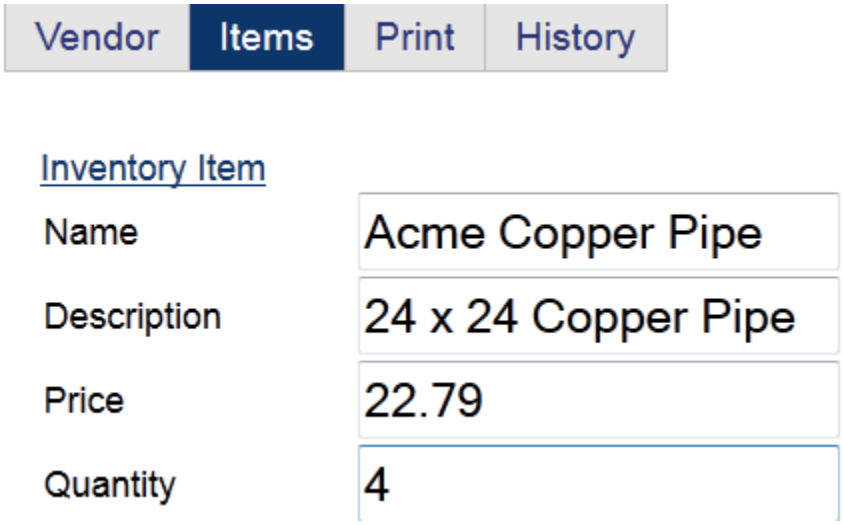


Note: Sprocket is customized based on customer needs. Your screen may or may not display the above fields. Contact your Sprocket Administrator with questions.

Begin filling out the necessary information into the form.



Note: Adding this as a non-inventory item will automatically document this product as an item form the vendor you listed on the vendor page. Be sure you have the correct vendor on the vendor tab before adding additional non-inventory items.

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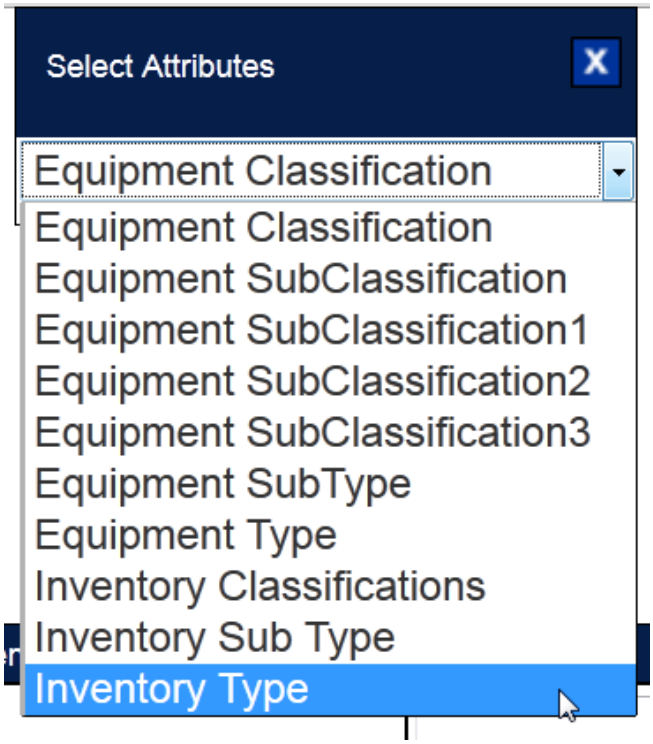
Use the Select Attributes below this form to add additional classifications to this item.

Use the drop down menu from the window that appears to further classify this item in the appropriate category. Remember, *Attributes* are *Optional*.



A list of possible attributes will appear in the window. Select the appropriate attribute for this product.

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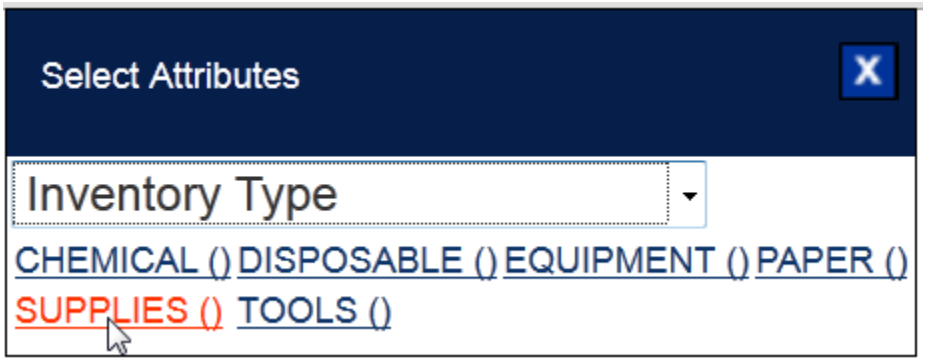
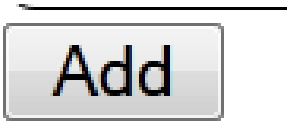


Note: Sprocket is customized based on customer needs. Your screen may or may not display the above attributes. Contact your Sprocket Administrator with questions.

Once you select the appropriate attribute, either select another attribute or click the blue ***X*** in the upper right hand corner of the *Select Attributes* window to close it.

Notice that the *Attributes* section of the form has been updated to include your selection.

Now that you have completed the form, click the ***Add*** button at the bottom to update the item grid with this non-inventory product.



Now, notice that the grid has been updated to include the product you have added.

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	Product ID	Description	Vendor #
Remove	290910	3316 1-1/2IN STIFF PUTTY KNIFE	
Remove	NS-02487	24 x 24 Copper Pipe	

If you wish to add more non-inventory items, begin filling out the form again following the same steps as before. If you wish to add additional inventory items, click the ***Inventory Item*** link at the top of the page to revert back to the original screen format to add inventory items by *Product Identifier* or *Vendor*.

7.5.2.4 Inventory Items Grid

Once you have added all the items to wish to add to this *Purchase Request*, notice that several columns in the *Items* grid have free text fields where you can enter information.

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	Product ID	Description	Vendor #	Comments	Quantity	Units
Remove	290910	3316 1-1/2IN STIFF PUTTY KNIFE			3	EA (1 ct)(1)
Remove	NS-02487	24 x 24 Copper Pipe			4	Individual(1)

You can enter information simply by clicking inside a text field and entering the appropriate information.

	Product ID	Description	Vendor #
Remove	290910	3316 1-1/2IN STIFF PUTTY KNIFE	24567

If you wish to order more than one unit of a particular item, use the Quantity column to enter in the product quantity you wish to request.

Quantity
4
6

Notice the ***Units*** and ***Price*** column. Use these column fields to enter in what the units are you will be requesting (i.e., boxes, crates, packages etc.) and the use the price column to enter in price per unit.

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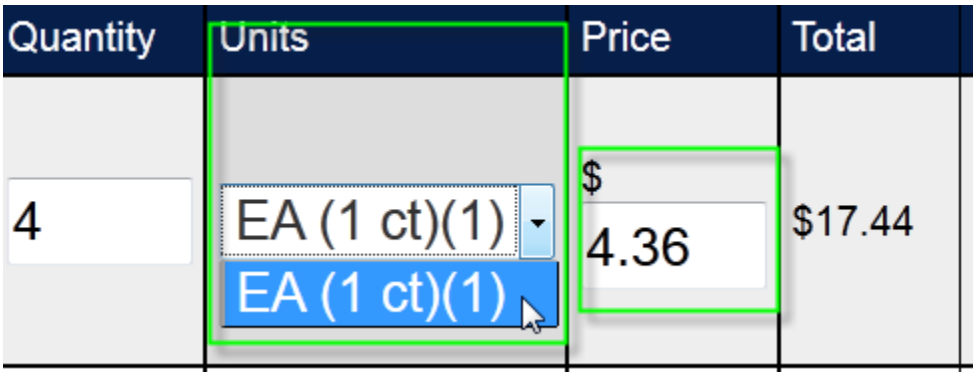
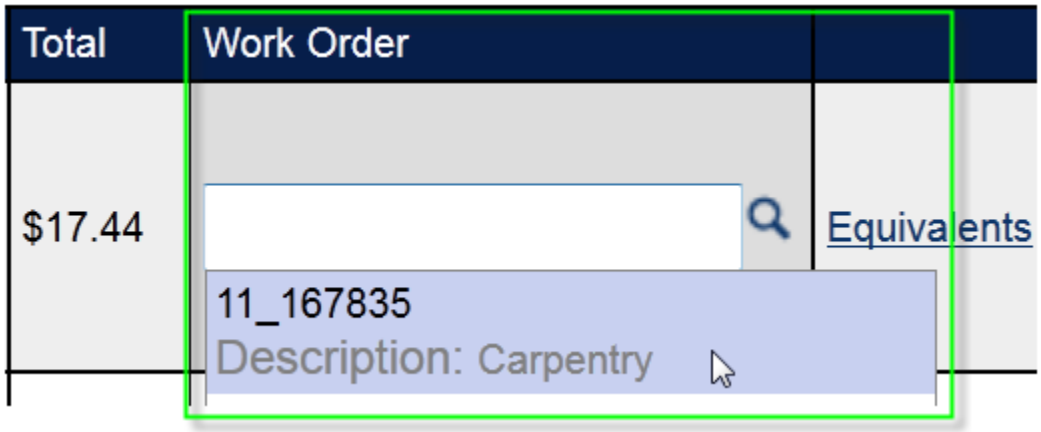


Notice that the ***Total*** column changes as price and quantity amounts are entered into the grid.

If this *Purchase Request* is for items to be applied toward a work order, use the *Auto Lookup Tool* in the ***Work Order*** column to locate and select the appropriate work order.



At the far right of the grid, use the ***Equivalents*** link to view any equivalent substitute products for this item.

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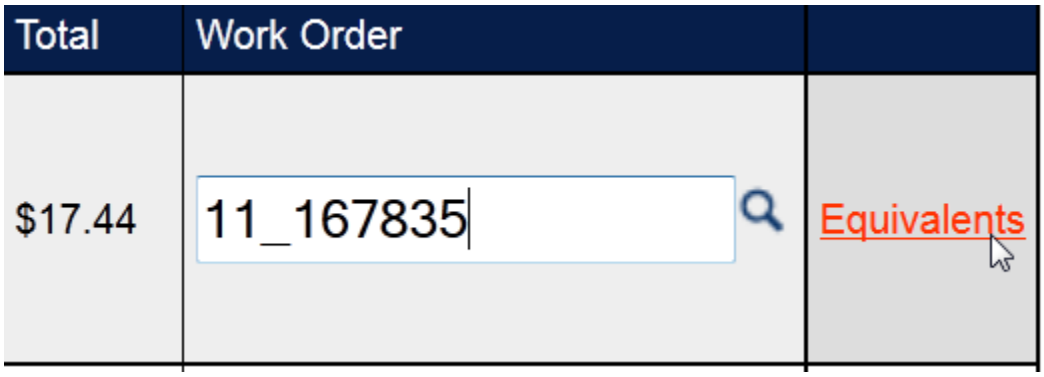

A window will appear displaying all *Equivalents*, if any, for the product in this row.

Once you have finished adding all the information you can exit the screen as all the information has automatically saved and added to the *Purchase Request*.

7.5.3 Purchase Request Print Tab

Use the ***Print*** tab to print out hard copies of your Purchase Request in three different types:

- *File Copy*: A hard copy kept on file within the company for reference
- *Vendor Copy*: A hard copy for vendors to use to supply inventory materials
- *Receipt Copy*: A hard copy of the receipt once materials are purchased

Simply select which copy you wish to print and follow the prompts on your computer to print the document.

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7.5.4 Purchase Request History Tab

Use the ***History*** tab to see an overview of all the additions or changes that have been applied to this Purchase Request throughout its life cycle. Any actions will be displayed in a grid along with the employee name who submitted the changes and the date these changes were made.

Purchase Request History

User	Action	Object	From	To	Date
Stevens, Jake	Update	Unknown	Unknown	Unknown	11/28/2011 9:24:14 AM
Stevens, Jake	Update	1-1/2IN STIFF PUTTY KNIFE Price	0	4.36	11/28/2011 9:19:11 AM
Stevens, Jake	Update	Acme Copper Pipe Quantity	4	6	11/28/2011 9:16:46 AM
Stevens, Jake	Update	1-1/2IN STIFF PUTTY KNIFE Quantity	3	4	11/28/2011 9:16:42 AM
Stevens, Jake	Update	Unknown	Unknown	Unknown	11/28/2011 8:25:49 AM
Stevens, Jake	Update	1-1/2IN STIFF PUTTY KNIFE Quantity	2	3	11/28/2011 8:24:04 AM
Stevens, Jake	Update	1-1/2IN STIFF PUTTY KNIFE Quantity	1	2	11/28/2011 8:23:54 AM
Stevens, Jake	Update	PR Identifier	AUTONUMBER	11_00005	11/28/2011 7:33:08 AM

Once you have reviewed all of the tabs in the *Purchase Request* and you are ready to submit your *Purchase Request* for approval, click the ***Submit For Approval*** button at the bottom left of your screen.

Now your Purchase Request has been submitted for approval and will go through the approval process throughout your facility.

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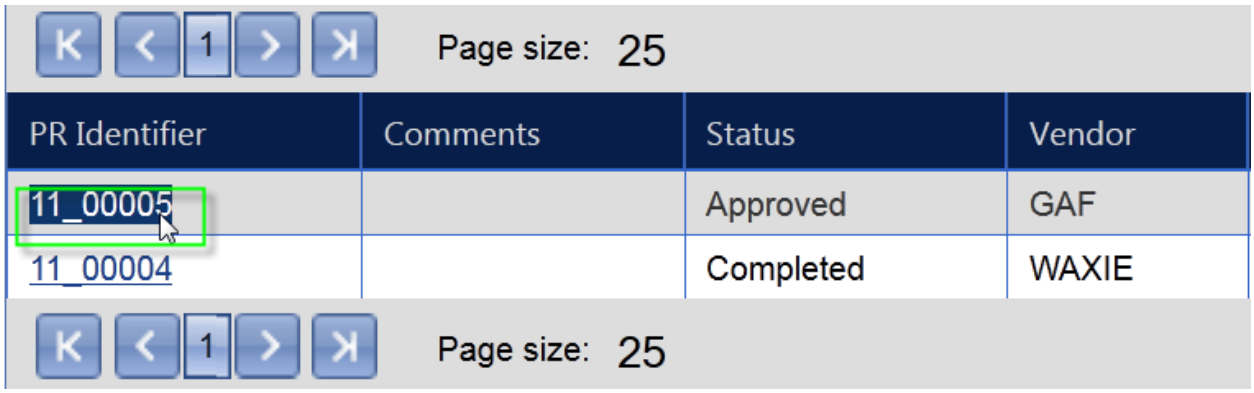
7.6 Purchase Request Details

Now that you have submitted your *Purchase Request*, note that you can always review the details of your *Purchase Request* from the *Purchase Request* screen. To do this, navigate to ***Inventory→Purchase Requests*** and select the Purchase Request Identifier you would like to view details for.



Once here, you can use the same tabs as before to navigate throughout the details of the *Purchase Request.* You can also update, add, or change information in the *Purchase Request*.

If you wish to make any changes or additions to this Purchase Request, simply click in the field you wish to change and type your changes.

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PO Number	45726AB
Foreman	

You may also add additional items using the same steps from section 7.4.2 as well as view history and make additional hard copies from the *Print* tab.

Once you have made your changes, be sure to click the ***Save*** button in the upper right hand corner of the screen to update the *Purchase Request*.

7.7 Purchase Request Save Buttons

When you save a purchase request, notice the other buttons next to the *Save* button.

Save	Save & Exit	Exit	Save & New	Delete

These allow you to do several things within module:

- *Save*-Allows you to save the work you have completed so far
- *Save & Exit*-Allows you to save the work you have completed so far and exit the screen with one click
- *Exit*-Allows you to exit the screen without saving any changes made
- *Save & New*-Allows you to save the work you have completed so far and clear the contents to begin a new purchase request
- *Delete*-Allows you to delete the purchase request altogether.

Once you have saved your work, you can move on to the next *Purchase Request*.

8.0 Additional Details

TOLL FREE: 866.891.4363 – FAX: 866.891.4363
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1396 Riverside Road |Bigfork, MT 59911
www.SPROCKETCMMS.com

8.1 Overview

Now that you have read this manual, you should have a better understanding of how Sprocket can be used for many day to day processes in your facility. Remember that Sprocket is customized based on facility needs so your screen may vary from the examples shown through out this guide. Your Sprocket Administrator will be able to give you additional details about your Sprocket settings and configurations.

8.2 Contact Us

For further assistance, questions, or technical consulting, please contact Sprocket Customer Support at *866-891-4363*. Office hours are Monday through Friday 8am-5pm MST (Office is closed for federal holidays), or email Sprocket Customer Support at *support@upturnsolutions.com*.

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